PayPal™

SEND MONEY FOR FINANCIAL INSTITUTIONS
HOW TO USE THE TOOLKIT

This document provides guidance on using each asset in the Send Money for Financial Institutions (SM for FIs) toolkit. Please read it in its entirety before using the toolkit.

OVERVIEW

The SM for FIs toolkit provides copy, logos, and images for promoting your institution's branded SM for FIs service to customers. PayPal developed these assets based on:

- Key learnings from financial industry research and testing
- Feedback from financial institutions already using SM for FIs
- Use cases proven by our existing SM for FIs customers
- Our own Send Money positioning

The assets and messaging contained in this toolkit give your institution everything it needs to promote and grow adoption of your branded SM for FIs service.

There are several ways you can use the toolkit:

- Simply cut and paste the copy, imagery, and logos for specific assets (banner ads, marketing emails, displays, etc.) into your branded promotional materials and on your website, inserting details such as the name of the service and your service URL, as appropriate.
- Incorporate only the elements you need into your branded promotional materials.
- Use the proven messages contained in toolkit assets to develop and design your own branded promotional materials.

Please note: There are highlighted placeholders in each asset, including for your institution's name and the name you've branded your SM for FIs service. Please replace highlighted placeholders with appropriate copy.

For example, if your institution names your SM for FIs service "CashNow," here's how you might revise the following tweet copy:

Toolkit tweet copy:

Try our [name of service] service. Send money instantly to almost anyone anywhere around the globe, anytime. All you need is a mobile phone number or email address! [URL].

Revised tweet copy:

Try our CashNow service. Send money instantly to almost anyone anywhere around the globe, anytime. All you need is a mobile phone number or email address! www.your-FI-name.com/cashnow.

TOOLKIT ASSETS

Landing Page

Develop a website landing page using the copy provided in the SM_for_FIs_landingpage file. Direct other promotional materials, such as tweets, banner ads, brochures, and statement inserts, to the URL you create for this landing page to develop a cohesive marketing campaign. Your landing page can serve as the gateway to all information and processes related to your SM for FIs service, including your online customer sign-up process and FAQs.

Landing page sample

Messaging

The messaging document includes information to help you evangelize the SM for FIs service both internally at your institution and externally to your customers (see the SM_for_FIs_messaging file). For internal evangelism, the document provides an overview of the service, why it's different, and how your institution can benefit. For external marketing, the document provides messages you can use in any promotional materials for the service. It describes what customers get, how it works, why they should use it, and how they can use it.

Product Descriptions

The toolkit provides 25, 50, 75, and 100 word product descriptions you can use when you develop your own promotional materials. The product descriptions are all customer-facing messages, so they're ready for use in any outbound promotional material. The product descriptions are located in the SM_for_FIs_productdescriptions file.

FAQs

Answer frequently asked questions on your website or in handouts. To help get you started, the toolkit includes answers to the questions PayPal anticipates your customers will ask. Many of these are based on feedback we receive from financial institutions already offering SM for FIs. Tailor these FAQs as needed to fit your institution's needs.


FAQs sample

Brochure

Promote the SM for FIs service in a branch office with a tri-fold brochure. PayPal recommends using the copy from the SM_for_FIs_brochure file and the HowItWorks image in the SM_for_FIs_imagery file folder. The copy provides an explanation of the service and how it works, benefits to users, and use cases to capture the imagination of your customers. Be sure to brand the brochure with your logo and replace highlighted placeholders with details such as the actual name of your service and website URL.

Tri-fold brochure sample

Statement Insert

The SM for FIs toolkit provides copy for a double-sided statement insert (see the SM_for_FIs_statementinsert file). You can use this copy with the Powered by PayPal logo and your institution's logo, look, and feel to create an eye-catching insert for all customer statements. The Powered by PayPal logo is in the file named PP_BA_Powered-By_V1.zip. Before you use any Powered by PayPal logos, please refer to the PP Brand Association Guidelines included in PP_BA_Powered-By_V1.zip.
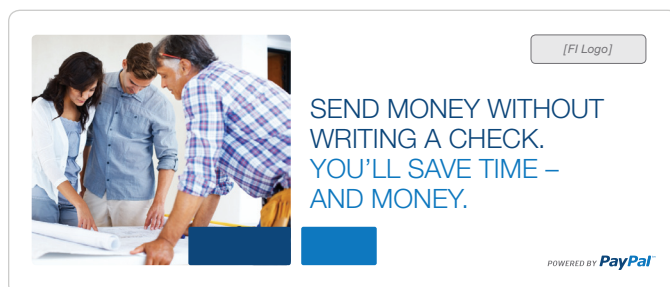
Statement insert sample

Marketing Email

Announce the SM for FIs service to your customers with a marketing email. You'll find all the copy you need to develop your email in the SM_for_FIs_marketingemail file. Add your logo, your name for the service, and your financial institution's name and you're ready to send.
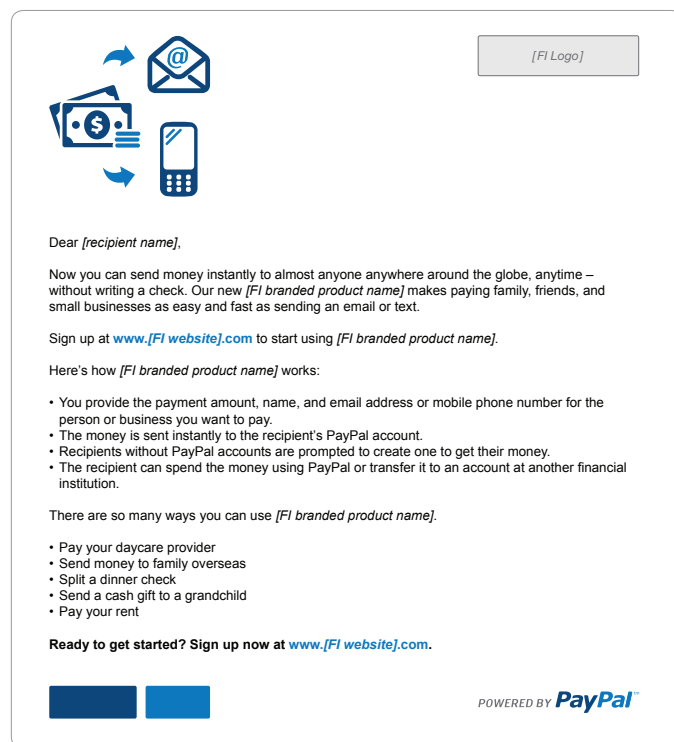
Marketing email sample

On-Statement Message

Inform your customers about the SM for FIs service with a message on their financial statements. You'll find this copy in the SM_for_FIs_on_statement_message file. Add the name of your service and position the message on your financial institution's statements so that it can be viewed easily by customers.

Tabletop Display

Promote the SM for FIs service in your branch with compelling tabletop displays. To create a display, you can use the copy provided in the SM_for_FIs_tabletopdisplay file. If space allows, we recommend including the provided HowItWorks image on your tabletop display. The HowItWorks image is located in various formats in the SM_for_FIs_imagery file folder.

Statement insert sample

HowItWorks Image

You may also want to incorporate an SM for FIs thumbnail image – also in the SM_for_FIs_imagery folder – and a Powered by PayPal logo, located in the PP_BA_Powered-By_V1 file folder. You can use the call to action provided or create a new one to reflect the sign-up process for your SM for FIs service.

Send money instantly to almost anyone anywhere, anytime.

It's easy. Provide the payment amount and the recipient's name and email address or mobile phone number.

Money is taken from your account and sent to the recipient's PayPal account.

Recipient can spend money from a PayPal account or transfer to another account.
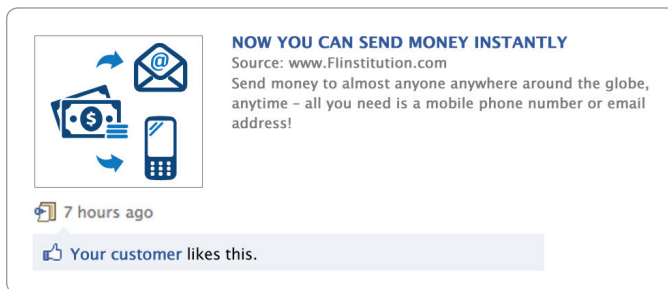
HowItWorks image

Banner Ad

The SM for FIs toolkit includes three different copy blocks you can use to create online ads. You'll find these copy blocks in the SM_for_FIs_banners file. Depending on the size of your ad, you may want to incorporate into the design an SM for FIs thumbnail image, located in the SM_for_FIs_imagery file folder.
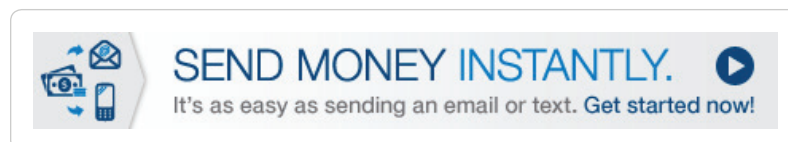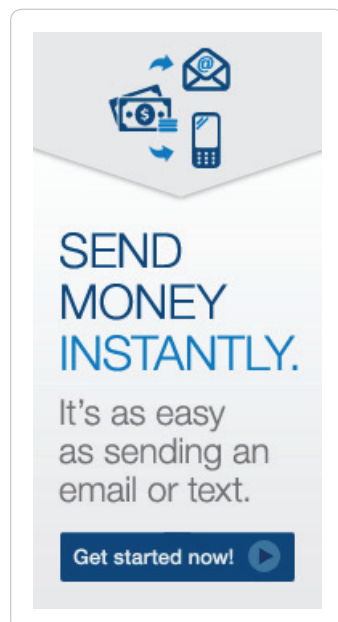
Facebook Thumbnail

Develop an announcement for Facebook with copy provided in the SM_for_FIs_Facebook file and the thumbnail image in the SM_for_FIs_imagery folder. The copy includes all relevant categories and metadata Facebook will use to assemble the description for your SM for FIs service webpage. For more guidance on profiling your service on Facebook, see http://developers.facebook.com/docs/opengraph/.

NOW YOU CAN SEND MONEY INSTANTLY
Source: www.Flinstitution.com
Send money to almost anyone anywhere around the globe, anytime – all you need is a mobile phone number or email address!

7 hours ago

Your customer likes this.

Statement insert sample

Tweets

The toolkit includes five different tweet options – choose one or several to promote your SM for FIs service to your followers. Be sure to replace highlighted placeholders with the correct information for your service, including its name and the URL for more information. Tweet copy is in the SM_for_FIs_tweets file.

Imagery

PayPal has developed several images for the SM for FIs service that can be found in the SM_for_FIs_imagery file folder. Although using these images is not mandatory, it is recommended. Included in the toolkit are several thumbnails that represent the service. These are ideal for communications where space is an issue – such as a Facebook post or an online banner ad.

The toolkit also includes a HowItWorks image that visually explains how the SM for FIs service works. It's ideal for tabletop displays, brochures, websites, and other assets with adequate space.

Logos

The SM for FIs toolkit includes "Powered by PayPal" logos you can use wherever you promote the SM for FIs service. They're located in the file named PP_BA_Powered-By_V1.zip. Before you use any Powered by PayPal logos, please refer to the PP Brand Association Guidelines included in PP_BA_Powered-By_V1.zip. It details instructions for how you may use the Powered by PayPal logo in promotional materials for the SM for FIs service.

POWERED BY **PayPal**™

To understand how Powered by PayPal logos should be used in the SM for FIs product experience, please refer to the mandatory guidelines.

LEARN MORE

After tailoring the assets in the SM for FIs toolkit, you're ready to start promoting your branded SM for FIs service. If you need additional assistance, want to provide feedback on the toolkit, or have questions about the toolkit or the SM for FIs service, contact your relationship manager.