

Answer Your Customer Questions Anywhere, Anytime

Proven Templates to Deliver Digital Self-Service

Delivering digital self-service starts with enabling customers to quickly and easily find answers to their questions themselves. At SilverCloud, we've worked with 200+ financial institutions to do just that using our proven three best practices. Use these templates to develop answers to the most commonly asked questions for your website and mobile banking application.

What are our best practices? We call it the 3 A's and it's all about creating excellent content that not only answers a question, but engages customers deeper into your products and services. More engagement means more time spent in your digital branch, less calls to your call center, more vested customers and stronger conversion.

SilverCloud Best Practices for Optimal Support Content

1. Answer the Question

Your answer clearly and succinctly answers the question.

2. Provide **Additional Information**

Supplement the answer with other relevant information, and link directly to it.

3. Make your Content **Actionable**

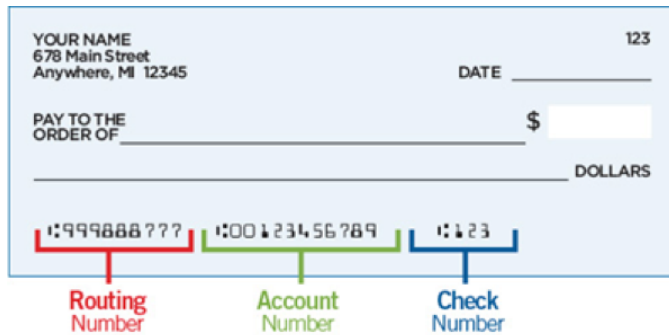
Give customers related actions to take with prominent calls-to-action.



Question

What is your routing / ABA number?

Answer Template #1



[YOUR INSTITUTION NAME]'s routing number is [INSTITUTION ROUTING NUMBER].

The routing number is also called an ABA number or routing transit number. You can find it in the lower left-hand corner of your checks (see left.)

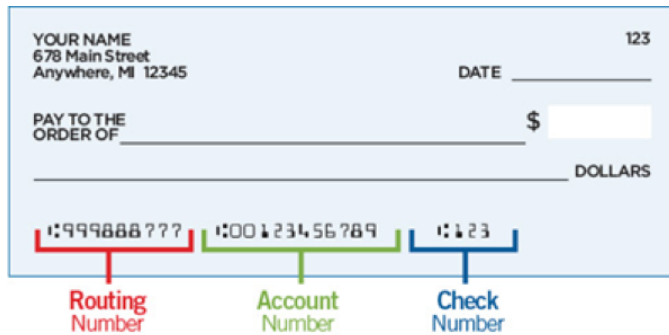
Financial institutions use routing numbers in order to send and receive money from other banks or credit unions. Routing numbers are essential in a lot of transactions that [YOUR INSTITUTION NAME] provides like bill pay [LINK TO YOUR BILL PAY PAGE], wire transfers [LINK TO YOUR WIRE TRANSFERS PAGE], check processing (sometimes called electronic checks), and direct deposits [LINK TO YOUR DIRECT DEPOSITS PAGE].

Using [YOUR INSTUTION'S ONLINE BANKING BRANDED TERM] you are able to use all of these electronic payment methods from your home in a safe and secure environment. Enroll in [YOUR INSTUTION'S ONLINE BANKING BRANDED TERM & LINKED] today!

Question

What is your account number?

Answer Template #2



Your account number can be located:

- On your statements
- Within your online banking [\[HYPERLINK TO ONLINE BANKING LOGIN\]](#)
- On the bottom number of your checks
- If you have misplaced or forgotten your account number, please contact one of our [\[CONSUMER / MEMBER\]](#) service representatives at [\[YOUR INSTITUTION SERVICE PHONE NUMBER\]](#), or stop in at any of our locations [\[LINK TO ATM & BRANCH LOCATOR\]](#) to obtain your full account number. For security purposes we will not include any account numbers via email.

Find a convenient [\[YOUR INSTITUTION NAME\]](#) branch or ATM near you by using our [\[ATM & BRANCH LOCATOR & LINKED\]](#) today!

Question

Can I open a savings or checking account online?

Answer Template #3



If Yes:

Yes! You can join [\[YOUR INSTITUTION NAME\]](#) without leaving the comfort of your home. Review our eligibility requirements [\[LINK TO ELIGIBILITY REQUIREMENTS\]](#) and sign up [\[LINK TO CONSUMER SIGNUP PAGE\]](#) for an account today.

[\[LIST CHECKING ACCOUNT OFFERINGS HERE AND LINK TO RELEVANT PAGES. EXAMPLE:](#)

- [Personal Checking](#)
- [Business Checking](#)
- [Joint Checking\]](#)

For more information about our account offerings please refer to our checking page [\[LINK TO CHECKING PAGE\]](#).

If you have further questions, stop by a branch location [\[LINK TO ATM & BRANCH LOCATOR\]](#) or contact us [\[LINK TO CONTACT US page\]](#) and a [\[CONSUMER / MEMBER\]](#) services representative will be happy to assist you.

Looking to open a Savings Account [\[LINK TO SAVINGS ACCOUNT PAGE\]](#) with [\[YOUR INSTITUTION NAME\]](#) as well? We offer competitive rates on Regular Shares [\[LINK TO REGULAR SHARES PAGE\]](#), Share Certificates [\[LINK TO SHARE CERTIFICATES PAGE\]](#), and Money Market Accounts [\[LINK TO MONEY MARKET ACCOUNTS PAGE\]](#)!



If No:

You will have to visit a branch location [\[LINK TO ATM & BRANCH LOCATOR\]](#) to set up your account. One of our [\[CONSUMER / MEMBER\]](#) service representatives will be happy to help you! Please review the eligibility requirements [\[LINK TO ELIGIBILITY REQUIREMENTS\]](#) and bring a photo ID with you.

[\[LIST CHECKING ACCOUNT OFFERINGS HERE AND LINK TO RELEVANT PAGES. EXAMPLE:](#)

- [Personal Checking](#)
- [Business Checking](#)
- [Joint Checking\]](#)

For more information about our account offerings please refer to our checking page [\[LINK TO CHECKING PAGE\]](#).

Looking to open a Savings Account [\[LINK TO SAVINGS ACCOUNT PAGE\]](#) with [\[YOUR INSTITUTION NAME\]](#) as well? We offer competitive rates on Regular Shares [\[LINK TO REGULAR SHARES PAGE\]](#), Share Certificates [\[LINK TO SHARE CERTIFICATES PAGE\]](#), and Money Market Accounts [\[LINK TO MONEY MARKET ACCOUNTS PAGE\]](#)!

Question

What are your hours?



Answer Template #4

For our branch locations and hours, visit our locations [\[LINK TO ATM & BRANCH LOCATOR\]](#) page.

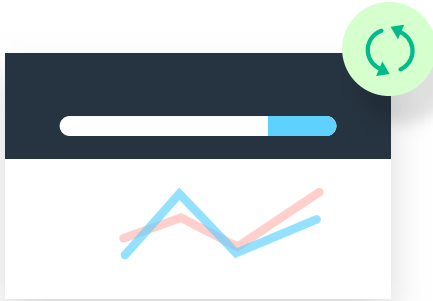
Did you know that you can access your account 24/7 using [\[YOUR INSTITUTION'S ONLINE BANKING BRANDED TERM\]](#)?

With [\[YOUR INSTITUTION'S ONLINE BANKING BRANDED TERM\]](#) you can view your account history, make online transfers, access Bill Pay and Statements...and more! All from the comfort of your own home.

To learn more about the convenience of banking online, please refer to our [\[YOUR INSTITUTION'S ONLINE BANKING BRANDED TERM & HYPERLINKED\]](#) page.

Question

What are the current rates and fees?



Answer Template #5


Rates may change frequently. Please select one of the links below for a complete listing of our competitive rates.

[LIST OFFERINGS WITH RATES HERE AND LINK TO RELEVANT PAGES. EXAMPLE:


- [Personal Deposit Rates](#)
- [Personal Loan Rates](#)
- [Business Deposit Rates](#)
- [Mortgage Loan Rates \]](#)

All fees are also subject to change. You can find our current fee schedule listed here [\[LINK TO FEE SCHEDULE PAGE\]](#).

Did you know...?

 **50%** of all incoming call center questions are the same top 20 questions?

 **54%** of support questions come in on nights and weekends?

 **95%** of call center inquiries can be addressed with 200+ answers to the most commonly asked questions?

 **73%** of mortgage questions come in off-hours?

Is your support content optimized to answer the questions that matter?

Learn how we can help you deliver [digital self-service in 30 days](#)