

CARDHOLDER EDUCATION

• How we proactively educate our cardholders about their paycard •



Every new cardholder receives a series of emails, each providing an in-depth overview of a different paycard feature.



Upon activation, new cardholders are given an overview of the SOLE Paycard program and our top 3 tips for card use.

1 ACTIVATION CALL



We use enrollment information to target cardholders across various social media platforms with helpful tips and videos.



When a cardholder is repeatedly incurring avoidable fees, such as those associated with ATM use, our outbound call team reaches out to the cardholder to reinforce the available alternatives.

2 NEW CARDHOLDER EMAIL PROGRAM

3 TARGETED SOCIAL MEDIA CONTENT

4 PROACTIVE OUTBOUND CALLS

5 CHECK IN CALLS



The enrollment process happens during a chaotic time when an employee is distracted with the demands of a new job. That's why we wait to call each cardholder 30 days after activation to check in and answer their questions about using the card.



We use dynamic behavior-driven messaging on our website and app to communicate timely information, like instructions for getting tax returns direct deposited onto the card during tax season.

6 MOBILE APP & WEBSITE