



OgilvyInteractive  
worldwide

# **Paperless DTW Marketing: Internal Comms – Opt In to Paperless Creative Brief**

Version 2.0, 24/11/03





# Project Summary

---

**Project Title** Paperless launch: UK Employees

**Business Unit** ICSS

**American Express Contact** Name: Claire Hollinshead  
Phone Number: +44 1273 713224  
Email Address: Claire.a.hollinshead@aexp.com

**Ogilvy Contact** Name: Vicky Graves  
Phone Number: +44 207 5667221  
Email Address vicky.graves@ogilvy.com

**Project Milestones** Brief to Amex  
Brief Approved  
Creative Briefing  
Present creative  
First amends briefed to creative  
Second amends brief to creative  
Pieces delivered and approved

**Project Budget** US \$12,000

**Ogilvy Job Number** AIT01N32345

## Approvals

---

**American Express** Claire Hollinshead  
Project Owner \_\_\_\_\_

**Ogilvy** Ian McAuley  
Client Service \_\_\_\_\_

**Ogilvy** Lino Ribolla  
Creative Director \_\_\_\_\_

[Please sign and date as appropriate]

## Creative requirements

---

### Description of service or offer

Checking your balance and doing simple transactions like balance transfers is standard for online banking but American Express are taking the next step in offering Cardmembers the opportunity to switch off their paper statements and receive online statements only. This is the next generation of managing your finances online. It's not innovative in itself – O<sub>2</sub> have been doing it for ages and British Gas have already launched Paperless - but within Amex's competitive set, it will be leading edge (currently only Egg and Lloyds Flexcard/ Accucard offer this).

We have been tasked to develop some comms. pieces for use internally within American Express offices. A **text email** and a **desk drop** will be given to all staff at the launch of My St@tament, encouraging them to opt-in to the service.

The way it works: You must already be enrolled in My Account – the online servicing section of the Amex website- to register for My St@tament.

1. Got to [www.americanexpress.co.uk/myaccount](http://www.americanexpress.co.uk/myaccount)

2. If you are already registered: enter your User ID and password then when the screen loads, click on the button for My St@tament.

If you are not already registered, click on 'I want to create a User ID and Password' and follow the simple online steps. The you can register for My St@tament.

3. After you sign up, you will no longer receive your monthly bill in the post. Instead, every month when the bill is ready, you will receive an email notification of the bill being ready to view online. The email links to your online statement (via the secure log in page). From here, you can view or print up to six months worth of statements. This online version is a legally binding equivalent to paper.

\*My St@tament is the name we have chosen to represent the paperless option. This is a sub-section of My Account, which is the overall term for the online servicing section. There is no specific branding or logo associated with My St@tament other than the name.

This email/ desk-drop is also part of a wider MYCA enrolment campaign and will follow a roadshow/poster campaign that will appear in Amex foyers/ around the coffee machines to raise awareness of the general online services available.

### Target Audience

This communication is aimed at all American Express employees who have an American Express Card:

#### 1. Primarily those who have a Card and are already enrolled for My Account

Some of those enrolled will be completely comfortable with performing simple transactions online and for them this will simply be the next step of moving life online. Others may use My Account on an infrequent basis for a small number of things, either due to a lack of knowledge about what is available or perhaps a lack of confidence in using new tools/ functionality.

## 2. **Secondarily those who have a Card but are not yet enrolled for My Account**

For others, who are not already in My Account, they may have either never got round to enrolling for online servicing or may be less comfortable with doing things on the Net. They may have concerns about complicated procedures or safety issues online. They will need reassurance that transacting online is straightforward and secure. It could be that these employees have never got round to signing up and the idea of My St@tement may encourage them to sign up.

Qualitative research into My St@tement demonstrated that for some, paperless statementing was a logical step into moving life online but for others, the taking-away for their paper statements was more of an emotional issue: people use their statements to check charges, claim expenses, and file away so they view this as a cynical cost-cutting move by American Express for which they get nothing in return.

Paperless has already been launched in the US and they have found that Cardmembers are more receptive to enrolling if it is promoted simply as a natural next-step/ benefit-led and not hyped up with over defensive messages and offering incentives.

### **Overall Marketing Objectives**

To encourage employees to sign up for My St@tement

### **Single most important thing this creative should convey?**

**Introducing My St@tement: the convenient online filing system for your monthly statements**

### **Why should the target believe this?**

Online statementing is easy, convenient and secure.

- No more need to receive and file mountains of paper
- We will notify you when your monthly statement is ready to view so you never forget
- You can print off or download your statement
- We will securely archive up to six months of previous statements online
- As secure than being sent a paper version in the post
- It's innovative. You buy your groceries and books online, you check your balance and transfer money from account to account online so this is just the next step in your online lifestyle

### **What do we want them to do next?**

Go to [www.americanexpress.co.uk/myaccount](http://www.americanexpress.co.uk/myaccount), log in to the secure area and register for My St@tement

### **Deliverables**

- Text Email (To be delivered by Lotus Notes)
- A5 Flyer/ desk-drop

Two creative concepts will be presented at first round.  
Two rounds of iterations.

**Mandatories** - Must conform to Style Guide.

**Identified best practices or key learning** N/A

