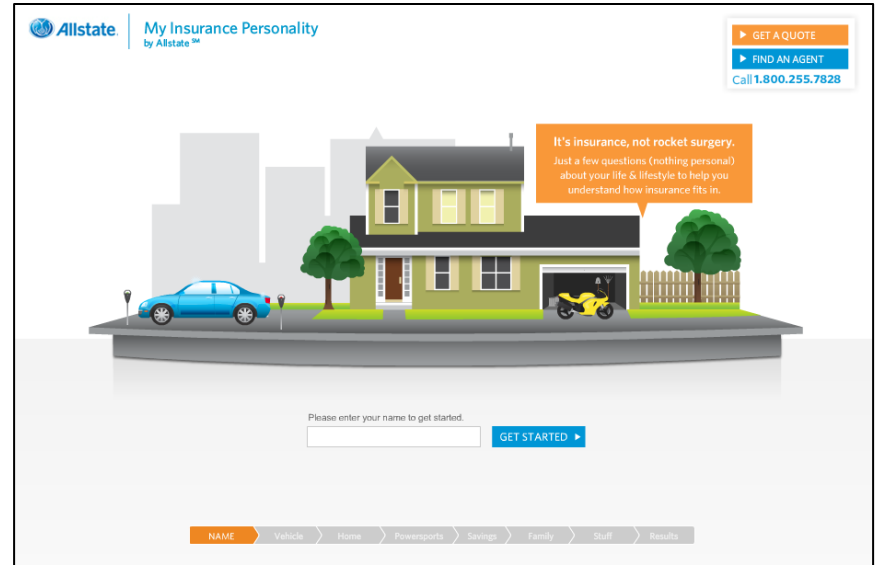


# Sarah Beckley

Senior Content Strategist: Samples  
[me@sarahbeckley.com](mailto:me@sarahbeckley.com) | 312.213.4352

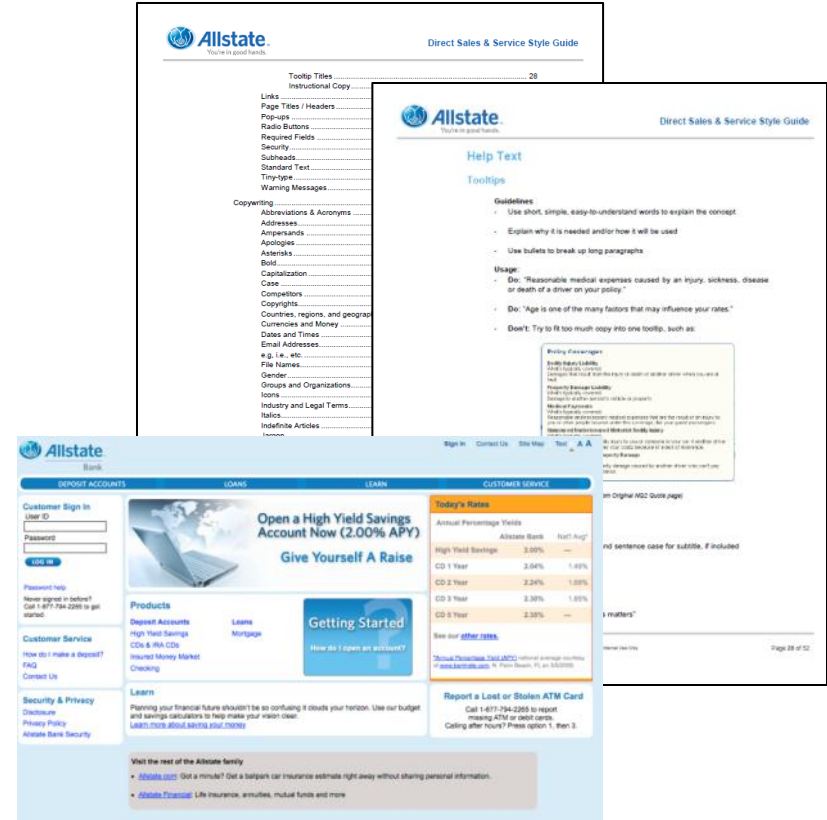
# Interactive sales tool for Allstate

- ▶ **Allstate** wanted a educational and engaging sales tool to illustrate insurance needs now and in the future.
- ▶ **Goal:** Increase site engagement, insurance education, and online sales.
- ▶ **Role:** Content strategist and copy writer
- ▶ **Deliverables:** App flow and copy
- ▶ My Allstate Personality



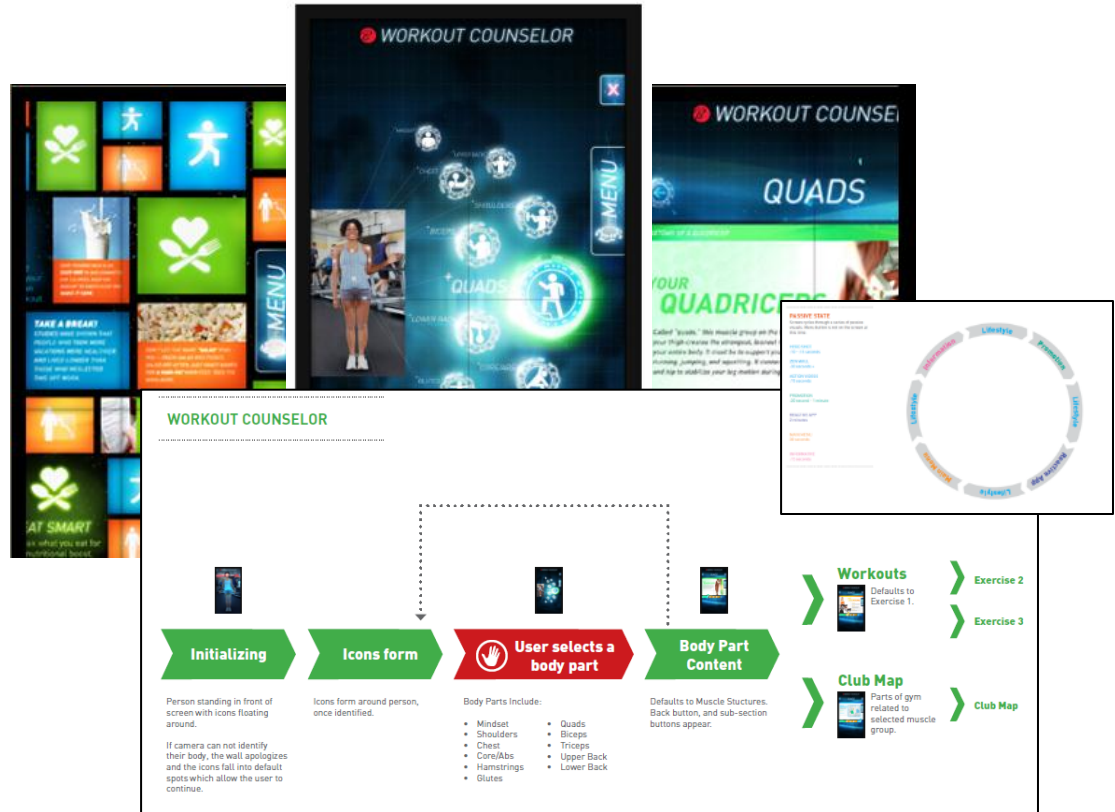
# Various Allstate projects

- ▶ Cumulatively spent 3+ years on a wide variety of projects for **Allstate** at several companies.
- ▶ Managed and audited auto quote (and later renter's quote) content matrix for 50 states:
  - ▶ 60+ columns
  - ▶ 3,500+ rows
- ▶ Created writing style guide for Direct Sales & Service division with fresh voice and tone, yet within Allstate brand guidelines.
- ▶ Managed copy for Allstate Bank redesign.
- ▶ Created many multi-level communication plans for corporate initiatives.



# Interactive media wall for Bally's

- ▶ **Bally's Total Fitness Results Center** is the most progressive health and fitness interactive tool ever delivered in a workout environment—7' media wall.
- ▶ **Goals:** Significantly reduce media spend, increase member satisfaction, and create a bold, industry-leading initiative.
- ▶ **Featured** at the World Retail Congress in Berlin.
- ▶ **Roles:**
  - ▶ Lead Content Strategist
  - ▶ User Experience Strategist
- ▶ **Deliverables:**
  - ▶ Content
  - ▶ UX flows



# Interactive schedules for Bally's

- ▶ Part of the **Results Center** project, we created interactive fitness studio schedules.
- ▶ **Goals:** Improve member experience, eventually offer mobile class sign up.
- ▶ **Roles:** Lead Content Strategist and User Experience Strategist
- ▶ **Deliverables:**
  - ▶ Content
  - ▶ UX flows



# Transactional web app for aigdirect.com

- ▶ **aigdirect.com** created from AIG purchase of 21<sup>st</sup> Century Insurance.
- ▶ **Goal:** Create an auto quote tool in 6 weeks with a 176 page requirements document and no brand identity.
- ▶ **Role:** Lead Content Strategist
  - ▶ Created “sub-brand” for quote
  - ▶ Helped create requirements
  - ▶ Co-designed unique deliverable format
  - ▶ Managed content team
- ▶ **Deliverables:**
  - ▶ Content
  - ▶ Style guide
  - ▶ Legal review packets

Auto Insurance Home | En Español

CONFIRM INFO PAYMENT

### Your Payment Options

\* asterisk indicates required field.

Which payment method do you prefer?

eCheck (electronic withdrawal from checking account)

Credit Card/Debit Card

How would you like to pay?

Pay in Full with +5% Discount = -\$375.00\* (You save -\$433.00\*)

Would you like to set up automatic recurring payments? \*

Yes  No

Your recurring payments will be automatically deducted each month.

Use the same card/account for recurring payment.

Credit Card Info

HELP CENTER

For friendly personal help, call <MCS>Call Help L>

Or you can:

- Have us call you
- Use Live Chat online
- Email us

We're here 24 hours a day, every day.

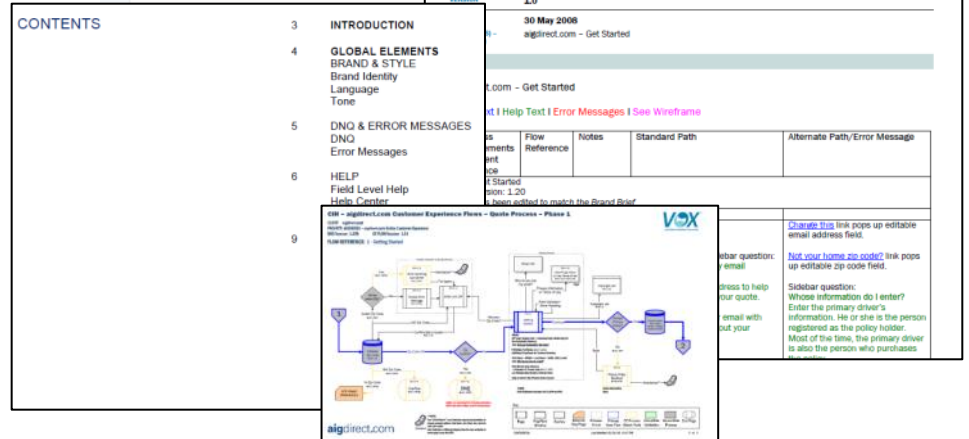
PURCHASE SUMMARY

6 Month Policy: \$538.00

Fee and Surcharges: 300.00

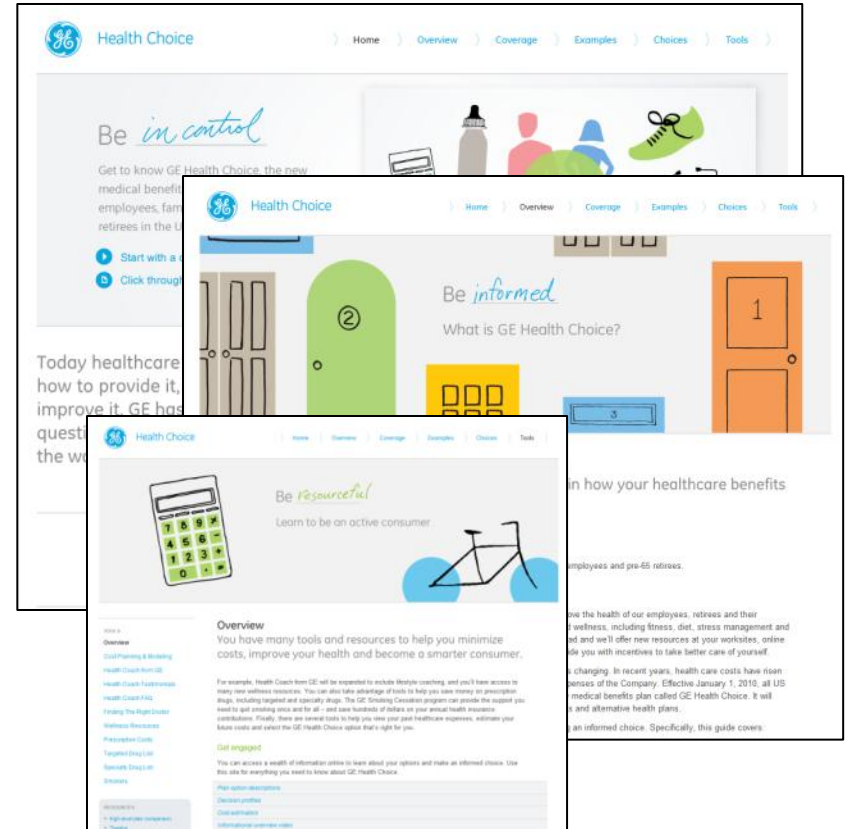
Applied Discounts: -\$63.00

Purchase Total: **\$575.00**



# Site redesign for GE

- ▶ **GE** changed the health insurance provider for 160,000 employees.
- ▶ **Goal:** Convert enrollment site into go-to-site for insurance questions and healthcare resources; reduce call center volume.
- ▶ **Roles:** Content manager and consulted on taxonomy.
- ▶ **Deliverables:**
  - ▶ Content map to new taxonomy
  - ▶ Content
  - ▶ Used Google Sites to manage content development for client and programmers
- ▶ [View the site](#)



# Site redesign for OIC

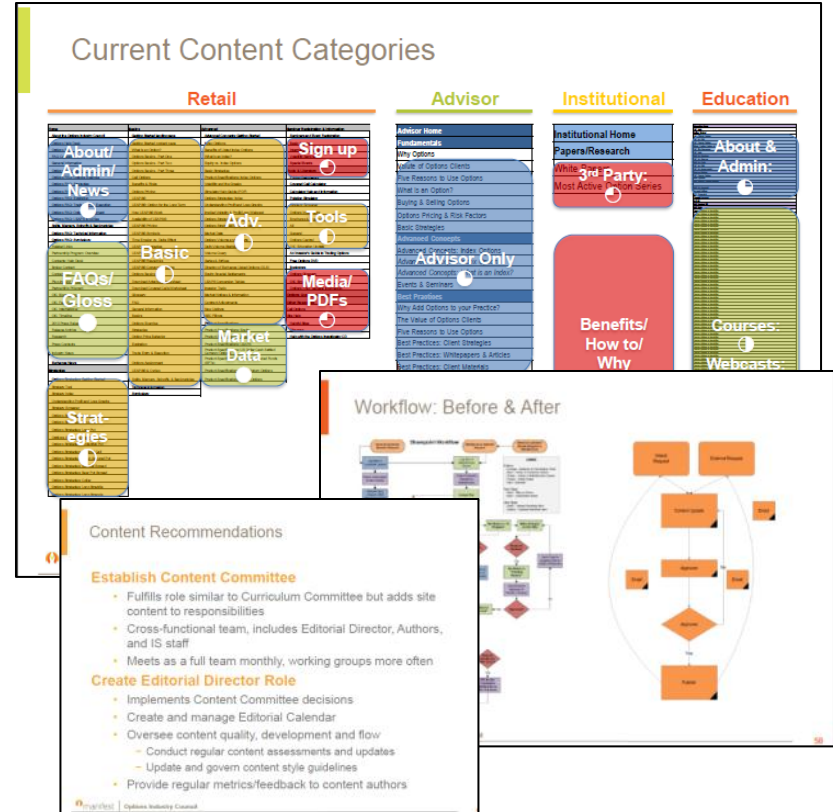
- ▶ **Options Industry Council** had four websites, one for each audience and an LMS that were largely redundant and hard to maintain.
- ▶ **Goal:** Create one site sophisticated enough for experienced traders, but not intimidating to equity options novices.
- ▶ **Role:** Lead Content Strategist
  - ▶ Co-designed and facilitated brand workshop
  - ▶ Created all content strategy docs
  - ▶ Co-designed user testing



# Site redesign for OIC

## Content strategy deliverables:

- Content audit findings
- Creative workshop findings
- Nomenclature audit findings
- Content guidelines and messaging
- Use cases
- Key stakeholder findings
- Content types
- SEO analysis
- User testing findings
- Metadata schema
- Workflows (CMS and editorial)
- Writing style guide
- Migration plan
- Executive presentations



# Internet banking app copy for HSBC

- ▶ **OHE HSBC** initiative to create one global experience for all Business Internet Banking customers. Most heavily used in Europe and Asia.
- ▶ **Success** led to HBUS and HBCA redesign project engagements.
- ▶ **Goals:** To redesign Internet banking; create directional, jargon-free, easy-to-localize copy; boost contextual help.
- ▶ **Roles:** Lead Content Strategist, provided UX consulting
- ▶ **Deliverables:**
  - ▶ Content matrix
  - ▶ UX suggestions

2.5 Success

HSBC Content Matrix

Item ID	Item Title	Page Description	Content Type	Original Content	Revised Content	Help Copy
		Group Transactions Landing Page				Due to length, all page level help copy is in a Word doc. HC numbers map to the Word doc.
11	header	Group Transactions	Group Transactions	Group Transactions		
11	subhead	Help us with this page	Group Transactions	Group Transactions		
11	link	Pay a group	Pay a group	Pay a group		
11	copy	Request payment to a group	Request payment to a group	Request payment to a group		
11	link	Import group from file	Import group from file	Import group from file		
11	link	Use existing template	Use existing template	Use existing template		
11	link	Your group details manually	Add a new group	Add a new group		
11	subhead	Collect from a group	Collect from a group	Collect from a group		
11	copy	Request payment from a group	Request payment from a group	Request payment from a group		
11	link	Import group from a file	Import group from a file	Import group from a file		
11	link	Use existing template	Use existing template	Use existing template		
11	link	Enter group details manually	Add a new group	Add a new group		
11	subhead	View & manage payments & transfers	Manage payments and transfers	Manage payments and transfers		
11	copy	Amend, review and configure payments	Review, edit, and configure payments	Review, edit, and configure payments		
11	subhead	Upcoming Payments & Transfers	Upcoming payments and transfers	Upcoming payments and transfers		
11	link	View all upcoming payments & transfers	View upcoming payments and transfers	View upcoming payments and transfers		
12	link	Select file to import from	Pay a Group - Import group from file	Pay a group: Import group from file		
12	subhead	Select file to import from	Pay a Group - Import group from file	Pay a group: Import group from file		
12	progress bar	Select file to import from	Pay a Group - Import group from file	Pay a group: Import group from file		
12	copy	Indicates a required field	Pay a Group - Import group from file	Pay a group: Import group from file		
12	subhead	Select file to import from	Pay a Group - Import group from file	Pay a group: Import group from file		
12	text label	Let's help	Pay a Group - Import group from file	Pay a group: Import group from file		
12	button label	Select file	Pay a Group - Import group from file	Pay a group: Import group from file		
12	button label	Cancel	Pay a Group - Import group from file	Pay a group: Import group from file		
12	button label	Continue	Pay a Group - Import group from file	Pay a group: Import group from file		
13	header	Pay a Group - Import group from file	Pay a group: Import group from file	Pay a group: Import group from file		
13	subhead	Review and edit group details	Review or edit Group	Review or edit Group		
13	progress bar	Review and edit group details	Review or edit Group	Review or edit Group		
13	link	Successfully imported #B payees from	Review or edit Group	Review or edit Group		

# Site redesign for HSBC

- ▶ **HSBC** rolling out global redesign with accessibility standards compliance.
- ▶ **Goal:** Reduce page count by half, become 508(c) compliant, and expand content in strategic areas.
- ▶ **Role:** Lead Content Strategist
  - ▶ Content style guide
  - ▶ Co-created taxonomy
  - ▶ Managed content team of four
  - ▶ Assisted with user testing
- ▶ **Deliverables:**
  - ▶ Style guide
  - ▶ Word copy decks
  - ▶ Excel copy templates


**Component Details**

Page Section	Component ID	Value	Population	Ordered
General Information Header	GN1	See SCR_1.1		Passed P...
	GN2	See SCR_1.2		
	GN3	See SCR_1.3		
	GN4	See SCR_1.4		
Page Content	PM7.a			Product Tab...
	PM7.a.1			Product Tab...
	PM7.a.1.LSDC			Product Tab...
	PM7.a.2			Product Tab...
	PM7.a.2.Label-on			Product Tab...
	PM7.a.2.HFOP			Product Tab...
	PM7.a.2.Trail-on			Product Tab...
	PM7.a.2.Target			Product Tab...
	PM7.a.3.Label-on			Product Tab...
	PM7.a.4	[More   Premier   Advance   Business]		Product Tab...
	PM7.a.5			Product Tab...
	PM7.a.5			Product Tab...
	PM7.a.5.Action	[Try   Filter]		Product Tab...
	PM7.a.5.Label-on			Product Tab...
	PM7.a.5.PREF	[URL   SCR ID]		Product Tab...
	PM7.a.5.Trail-on			Product Tab...
	PM7.a.5.Target			Product Tab...
PM7.a.6			Product Tab...	
PM7.a.6.Label-on			Product Tab...	
PM7.a.7.HFOP			Product Tab...	

# Site redesign for HSBC Canada

- ▶ **HBCA** brought Manifest on for the same redesign rollout for Commercial Banking.
- ▶ **Client says:**
  - ▶ “[Sarah] makes my job easier.”
  - ▶ “We think Sarah is a value-add to the project and we love working with her.”
- ▶ **Goals:** Same as HBUS project, plus localize content.
- ▶ **Roles:** Lead Content Strategist, UX support for client
- ▶ **Deliverables:**
  - ▶ Style guide
  - ▶ Copy decks

Page Count	Page ID	Level 0	Level 1	Level 2 (Main Nav)	Level 3 (Doormat)	Level 4	Level 5
1	100.2			<b>HSBC Business (\$3million - \$50million)</b>			
	100.2.1			Banking			
	100.2.1.1				Business Banking Accounts		
	100.2.1.1.1					BusinessVantage Account	Product
	100.2.1.1.2						FAQs
	100.2.1.1.3						Compa
	100.2.1.1.4						Apply
	100.2.1.1.5						Busin
	100.2.1.1.6						
						Current Account	
						Cash Management Account	
						Trust Account	
						Commercial Savings Account	
						Foreign Currency Commercial Savings Account	
						Business Savings Account	
						Creditor Insurance	
							Credito
						Travel Insurance	
						Export Credit Insurance	



HSBC Canada CMB Content Development 19-Jan-12

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### CONTENT STYLE GUIDE INTRODUCTION

This document contains writing guidelines for HBCA's PWS 1.5 website redesign that outlines global guidelines for how to write for this site redesign, from capitalization to spelling, and including page-specific guidelines like character counts to accommodate design template restrictions.

Note that this is a living document that should be updated regularly.

This guide is a Canada-specific supplement to the HSBC *Digital Writing Guide*, external writers, editor, and approvers of HSBC Web, mobile, and ATM content 2011, created and updated by Customer Experience Technology (CET) and Guide, version 4.5, June 2009.

**Contents**

FORMATTING.....

PUNCTUATION.....

CAPITALIZATION.....

CTA MODULES | CREATING RIGHT-RAIL CONTENT.....

    CTAs.....

    Right Rail Modules.....

SPELLING.....

DISCLAIMERS.....



HSBC Canada CMB Content Development 19-Jan-12

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### CAPITALIZATION

Terms below are listed with the proper casing. If the term you are looking for does not appear in the list below, it should not be a proper noun.

XSL Modules, CTA modules, all headlines, all subheads, right-hand column modules

Casing should be consistent with proper casing of product names, otherwise it is sentence case. Copy does not become automatically lower or uppercase. All branded product names are capitalized, even if not listed here.

**Note: Service is capitalized when it follows a proper noun, e.g. Account Reconciliation Service**

Account Reconciliation Service	Import Services
Bill Pay	Interac®
Bill Payment Receiver Service	International Banking
Business without Borders	International Banking Centre
Business Internet Banking	International Payments and Cash Management
Commercial Savings Account	Letters of Credit (when modified, that word also becomes capitalized, e.g. Import Letters of Credit)
Electronic Funds Transfer (EFT)	
Foreign Currency Savings Account	Online Tax Filing Service (OTFS)
Global Opportunity Tool	Payment Services
Global Relationship Manager	Relationship Manager
HSBC business client	Trade and Supply Chain
HSBC Connect	Travel Insurance

# Samples close up

Specific documents available for review upon request.