

Leaders Awareness Work Samples

We knew from our assessments and surveys conducted by internal communications and the ATB customer insights team that team members' preferred method of receiving information is from their leaders. With this in mind, the purpose of the Leaders Awareness phase was to inform and excite frontline leaders in advance of communication being shared with their teams and to provide them with the details needed to lead the change at the local level. Targeting leaders specifically would contribute to our goal for frontline team members being aware of the new mobile app and understanding the key features, so they could confidently demo and recommend the app to customers. It would also only be possible to achieve our objectives of doubling the number of team members talking about the mobile app the number of conversation they had with the buy-in and encouragement of their leaders.

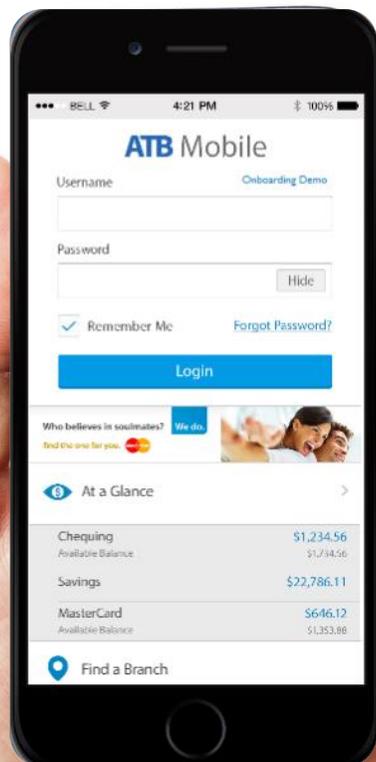
Tactics & Timing	Purpose
Leaders Guides & Meetings <i>Sept 21, Oct 3, Oct 18, Oct 24</i> + <i>weekly stakeholder meetings</i>	<ul style="list-style-type: none"> • Inform and excite leaders and provide them with the details they needed to lead the change at the local level. • Produced two physical Leaders Guides that were emailed out and spoke to leaders during two different standing leadership meetings.

Key Messages:

- **Are your team members ALL IN?** We expect all ATB team members to be experts and advocates for our digital properties and incorporate our digital properties into all customer conversations. Every one of our 5,146 team members need to immerse themselves in our banking and investment experience and be accountable for providing ATB with feedback to help us become the place to bank in Alberta.
- **Saving our customers time and effort.** We're upgrading the ATB Retail Mobile app to make banking with ATB better than ever! Compared to our current mobile app, the new ATB Retail Mobile app is easier and more intuitive to use, has better functionality and fewer steps to complete banking transactions in less time.
- **Help us increase our Digital Core customer base.** Research shows that 1 in 3 ATBOL customers are using their mobile device to access ATB Online using their web browser instead of using our mobile app. The upgraded ATB Mobile app is faster than accessing ATBOL on their phone or tablet devices. Plus it offers greater functionality specifically designed for phones and tablets.
- **Convenience and flexibility with fewer swipes is a thing of beauty.** Our upgraded ATB Retail Mobile app will provide personalized account balances at-a-glance, easier e-transfers and more intuitive navigation in the palm of your hand. Customers can get all this and greater security for free when they enrol in online banking. We know our customers will be "WOW-ed".
- **Features our customers are going to love!** The improved functionality of the new ATB Retail Mobile app includes:
 - **Convenience:** View up to 3 account balances at-a-glance without having to log in. Touch-ID for iOS makes log-in easy. Deposit a cheque as soon as you receive it, simply by taking a picture of it.
 - **Security:** The security of your accounts and transactions is our top priority. With our new mobile app, Enhanced Security is built right in so when we identify a sensitive transaction such as adding a new bill payee or e-Transfer recipient, or a password change we'll verify it's you in two easy steps before completing the transaction.
 - **Easy:** Features are easily accessed from the home screen making it easy to see account balances, make bill payments, deposit cheques, transfer funds other ATB accounts and send *Interac* e-transfers.
 - **Fast:** Find past transactions quickly with comprehensive filters that search all accounts at once
 - **Customer Onboarding:** No need to set up online banking in ATB Online first. Customers can now go directly to the mobile app to get their accounts set up and be on their way.

Retail Mobile 3.0

Leaders Guide



What you need to know

We're upgrading the ATB Retail Mobile app to make banking with ATB better than ever! Compared to our current mobile app, the new ATB Retail Mobile app is easier and more intuitive to use. Customer experience was front of mind when we looked at redesigning our app. It has better functionality and requires fewer steps to complete banking transactions, so they can bank wherever and whenever from their smartphone or tablet without navigating the full ATB Online website. And we've done all this while still producing an app that is safe, secure, speedy and easy to use.

With our new app, we're all about saving our customers time and effort. Here are some things that we think you and our customers will really love!

- **Intuitive Design:** Features are easily accessed from the home screen making it easy to see account balances, make bill payments, deposit cheques, transfer funds other ATB accounts and send Interac e-transfers.
- **Touch ID:** Enabling Touch ID, on iOS, devices makes log-in easy
- **Mobile Cheque Deposit:** Deposit a cheque as soon as you receive it, simply by taking a picture of it
- **At a Glance:** View up to 3 account balances without having to log in
- **Customer Enrolment:** No need for customers to set up online banking at ATB Online first. They can now go directly to the mobile app to get their accounts set up and be on their way.

What you need to do

- ✓ Become aware of the features and functionality of the app
- ✓ Schedule team meetings to share this information with your team
- ✓ Ask any questions that you are unable to answer, and communicate promptly back to your team.
- ✓ Engage in the learning conversation process with team members.



Use this learning conversation model to engage in meaningful conversations with your team members.

Resources for you and your team

- [Retail Mobile product page](#) on insideATB is your one stop for all information related to Retail Mobile.
- [Retail Mobile Simulator](#), available on ATB mobile devices or computers connected to the ATB network, will provide team members with hands on experience using the new app before it's available in the app store.
- **Training Materials**, available beginning September 26, will include information on the app enhancements, using the simulator and job aids.

Spreading the word

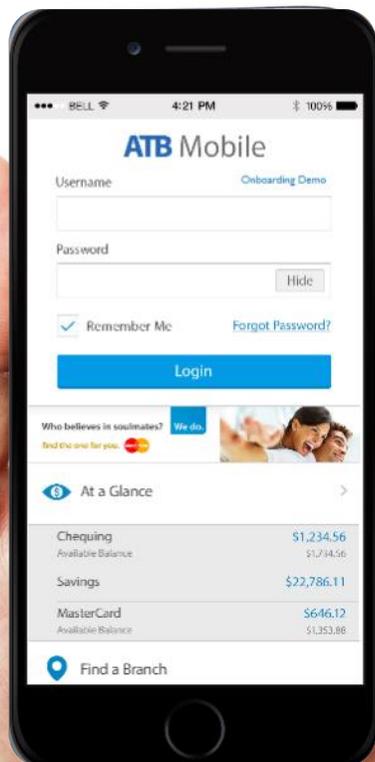
To get the word out to team members, watch for:

- Regular insideATB and AOE newsletter articles, starting September 23
- Team Member Download Week October 24-28
- Customer Enrolment Contest, starting in November

Questions?

If you have any questions related to the new Retail Mobile app, please contact:

- **Support Centre:** 1.877.748.3375 | Option 4
- **Channels & Payments Project Team:** channelchanges@atb.com



Retail Mobile 3.0

Promotion & Contests Leaders Guide

Team Member Download Days

Timing:

- October 26 – November 30

How it works:

- Team members download Retail Mobile 3.0
- Team members use the 3.0 app to make a money movement transaction using the app (ie. Bill Payment, Transfer, Interac e-Transfer, Mobile Cheque Deposit) from October 26 – November 30
- Team members are automatically qualified to win 1 of 5 prizes for a \$500 pre-paid credit card* (in equivalent EDH points)

How you can support:

- Throughout download contest period we encourage ATB people leaders to do random spot checks with team members to see if they've downloaded the new app (and to show them).
 - If the team member hasn't downloaded the app yet, this provides an opportunity for the leader to start a conversation and encourage their team to download the app.
- If the team member has downloaded the app, leaders are encouraged to recognize those team members by giving them a recognition in Every Day Heroes.

Customer Enrolment Contest

Timing:

- November 27 – December 24 (to coincide with MKTG Campaign)

Contest audience:

- All RFS, including APC and CCC team members

How it works:

- Team members to be broken down into Peer Group
 - 12 peer groups in total (10 RFS + 1 APC + 1 CCC)
- Team members will track successful conversations (ie. Customer identifies they already have the mobile app and have updated to the 3.0 version or customers who will download the app. If you have a conversation with the customer and they say they will not download the app the conversation can't be tracked) using the Conversation Tracker in CRM
- Every week 5 random draw prizes will be awarded to team members who have tracked a minimum of 10 mobile conversations in the Conversation Tracker (5 conversations for APC)
- At the end of the 4 week contest period a grand prize will award the top 2 team members from each peer group who have the highest number of successful ATB Retail Mobile customer conversations logged in the Conversation Tracker

Prizes:

- 1st place in each peer group get 20,000 EDH Points
- 2nd place in each peer group get 10,000 EDH Points
- Weekly prize draws of 5,000 EDH Points awarded to 4 randomly selected team members (across all peer groups) who had a minimum of 10 successful mobile conversations tracked in CRM Conversation Tracker (minimum of 5 conversations for APC team members)

How you can support:

- Continue to talk to your team members about Retail Mobile and encourage them to have conversations with customers about the app and how to use it.
- If the team member doesn't have the app, encourage them to download it so they can see how simple and convenient it is to use
- Remind team members of the sales scenarios and that they can use the simulator for customer demos.
- Encourage healthy competition amongst team members (ie. who can track the most conversations in a shift, day or week at your own location)

Questions?

If you have any questions related to the new Retail Mobile app promotion contests, please contact:

- **Channels & Payments Communications Manager:** Nekolina Lau | NLau@atb.com