advanta design lab

what if advanta played by different rules?

leap!: sample components

ADVANTA credit cards for small business™

employee cards

XYZ Corporation
April 5, 2009

John Q. Sample
XYZ Corporation
123 Main Street, Suite 456
Anytown, USA 12345-6789

Dear Sample A. Sample,

I recently heard about a difficulty you experienced with your employee cards and wanted you to know that we are working to make employee cards easier to manage.

Here are some things that can help you right now:

- **Dedicated Representative:** I have assigned a Dedicated Representative to help you manage your account. His name is Charles R., and his direct line is 800-617-1269. He is available Monday-Friday from 9:30am-6:30pm Eastern.
- **E-mail Alerts:** Employee Card E-mail Alerts can notify you when an employee is approaching his or her Monthly Spending Limit or makes a large purchase. To sign up for e-mail alerts, log in to www.advanta.com and go to the Customer Preference Center.
- **Quarterly Report:** Review your enclosed Employee Card Quarterly Report to determine if you need to make adjustments to the Monthly Spending Limits currently set for your employees.
- **User Guide:** Read the enclosed Guide to Employee Cards to review how to get the most out of your employee cards, common misunderstandings and the latest features.
- **FAQ Page:** Receive answers to common questions about employee cards on the new Employee Card FAQ page by visiting www.advanta.com and clicking on the Help section.

I want to make sure you have the tools you need to succeed. Please contact us if you have any questions or if we can assist you in any way. Thank you for your business.

Sincerely,

David Herscott
Senior Vice President
Advanta Bank Corp.

manage your employee cards:

www.advanta.com
Log in to go to Employee Cards in the Account Maintenance Section

1.800.705.7255

ADVANTA credit cards for small business™

XYZ Company

employee card quarterly report

April 5, 2009

Employee	Monthly spend limit	JAN	FEB	MAR
David Herscott	$500	$200	$480	$450
Wendy Clegg	$4,000	$3,700	$3,950	$3,800
James Sheero	$6,200	$4,000	$4,000	$4,000
Amy Grove Bigham	$10,000	$9,000	$9,900	$8,500
Chris Berejik	$12,000	$6,000	$11,800	$10,000
Mark Wills	$25,000	$18,000	$25,000	$22,000
Michael Jacobsen	$25,000	$24,500	$14,000	$20,000
Jon Bjornson	$25,000	$18,000	$24,500	$21,000

Monthly Spend Limit
Monthly Spend
Exceeded 75% of Limit

Monthly Spending Limit
You may quickly change a Monthly Spending Limit — it's easy and the changes are effective immediately. By calling customer service you can set a Temporary Monthly Spending Limit increase to cover any period of time up to three months.

Employee Card E-mail Alerts
Employee Card E-mail Alerts can notify you when an employee is approaching his or her monthly limit or makes a purchase over a set amount. To sign up for e-mail alerts, log in to advanta.com and go to the Customer Preference Center.

Full Report Available Online
Get the most up to date information on all employee spending online at www.advanta.com.

manage your employee cards:

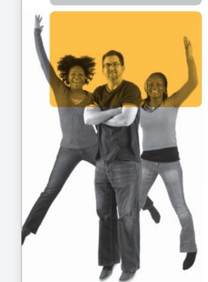
www.advanta.com
Log in to go to Employee Cards in the Account Maintenance Section

1.800.705.7255

Leap!
Guidebook
2009

ADVANTA

Our beliefs



1. You cannot hug somebody and kick them in the shins at the same time.
2. Experiences that are designed for everyone satisfy no one.
3. We must offer an experience to our top customers commensurate with their value to the company, and we don't have to give away the shop to do it.
4. We must challenge convention — ask "why?" and "why not?"
5. We must be relentless in resolving customer issues with immediacy and efficiency.
6. We must be active, attentive listeners. The best customer insights come from the people on the front line.
7. If we make our products easier to use, customers will use them more often.
8. Smart strategies designed to create customer loyalty will make it easier to acquire new customers.
9. Trust carries a premium. If we deliver the experience we promise, we will build trust over time.
10. We can get there together if we are passionate, stay immersed in the process and work like crazy.

1

Customer voices

Please congratulate the rep who assisted me. He was outstanding and extremely helpful as well as knowledgeable. Completely absent from this call was the robotic, script-like approach—ineffective after the first 2 or 3 seconds—common to so many other card companies. Thanks. I appreciate you.
— Leap! Customer, Andrew L.

Thank you for continuing to be the professional company you are. We receive many credit card offers, but we choose to stay with you.
— Leap! Customer, Clayton E.

I am thankful that I have a company looking out for the needs of my business. I am really pleased with the great service.
— Leap! Customer, Tamela M.

I gotta tell you, I appreciate you staying on top of it and calling me.
— Leap! Customer, Leonard Y.

You have been super-helpful and I appreciate it. Do you have an extension so I may speak to you in the future if I need to do anything to my account?
— Leap! Customer, Dennis S.

Team quotes

Leap! is about nurturing two incredibly valuable assets - our most successful small business customers and the employees that serve them. However, we cannot stop there, we must also innovate in order to succeed.
— David H.

Seldom do you get an underhand toss in business. We've been given thousands of profitable, engaged customers to manage. Our success is up to us - we just need to do the right thing every time - the right thing for our customers and employees. — Chris B.

Leap is unique in that we truly see the customer as a partner. We know that our success is rooted firmly in the customer's success.
— Vincent J.

In any business there is always a fight between short term goals and long term strategy. I think we are trying really hard to get that balance right. We work hard every day to reach our goals, but we are just as tireless when it comes to advocating for staying true to building something that will position us for the future. — Jim S.

Leap! is a family of dedicated employees with the passion to innovate and care for our small business partners. It's about breaking through the barriers of old practices with sober idealism.
— Marion S.

Leap!
Style guide
MAY 2009

ADVANTA DESIGN LAB

Typography

Benton Sans is the typeface family for all **Leap!** communications.

body text (print)
heads

Benton Sans Book
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Benton Sans Book Italic
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

body text (web)
text on yellow tags

Benton Sans Regular
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Benton Sans Regular Italic
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

subheads
emphasis within heads

Benton Sans Medium
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Benton Sans Medium Italic
ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

2

Leap! Style Guide : **Typography**

subhead — Benton Sans Medium
body text (print) — Benton Sans Book
head — Benton Sans Book
head — Benton Sans Book
emphasis within head — Benton Sans Medium
body text (web) — Benton Sans Regular
head — Benton Sans Book
yellow tag text — Benton Sans Regular

Note:
Arial should be used for online applications such as emails.

3

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user guide | employee cards

you determine the monthly spending limit that is right for each of your employees

Set a Monthly Spending Limit for each employee. A Monthly Spending Limit is the total amount you authorize your employee to spend over the course of a single statement billing period .

Monthly Spending Limits renew on the first day of each billing cycle. Making a payment does not renew Monthly Spending Limits on employee cards. If an employee reaches his or her limit and you want him or her to be able to spend more before the next billing period starts, you must increase the limit up to the total credit line for the account.

The maximum spending limit any employee can have is equal to the total credit limit for the account. The total of all Monthly Spendi... may be greater than the total credit limit for the acco...

You can also make a Temporary M...
A temporary increase ... months. This is a gre... of additional credit fo...

To change a Monthly S...

www.advanta...
Log in to go to Emplo... in the Account Mainte...

1.800.705.7...

there are four ways to track employee spending:

1. E-mail Alerts new
Get important information about employee spending delivered directly to your inbox, so you don't have to go looking for it. E-mail alerts can notify you when:

> An employee is approaching his or her Monthly Spending Limit
> An employee's purchase exceeds 50% of his or her Monthly Spending Limit

To sign up for e-mail alerts, log in to www.advanta.com and go to the Custo... ...ence Center.

... Management
... your latest account activity organized by employee. ...reate the custom reports you need and print or download ...oks®, Quicken®, Microsoft® Money and Excel®.*

...Card Report new
... can access an overview of each employee's spending ...nthly Spending Limit online.

...ized by employee on your monthly billing statement.

common issues

An employee may only utilize his/her spending limit if there is available credit in the account.
This is true even if Joe has only spent $100 of his $500 Monthly Spending Limit.

user guide | employee cards

how to get the most out of
employee cards

ADVANTA

From: Advanta [sender@emailtests.com]
Sent: Tue 11/25/2008 6:24 PM
Subject: dltest3

ADVANTA credit cards for small business™

employee cards

Sign up for Employee Card Email Alerts >
Visit the Employee Card FAQ page >

Dear Mr. Gorenko,

Employee cards can help you simplify, track and organize business spending. Here are some of the features that employee cards provide:

- **Flexible Monthly Spending Limits**
Because the needs of your business are unique, you determine a Monthly Spending Limit that is right for each of your employees. It is easy to change Monthly Spending Limits as your needs change.
- **Easy Tracking and Control**
Employee Card E-mail Alerts deliver information about employee spending directly to your inbox. Log in to www.advanta.com to view your latest account activity organized by employee and create custom reports. You will receive Quarterly Reports comparing the Monthly Spending Limits of your employees to their actual spending.

We want to make sure you have the tools you need to succeed. Please contact us if you have any questions or if we can assist you in any way. Thank you for your business.

Sincerely,

David Herscott
Senior Vice President
Advanta

www.advanta.com
Log in to your account

1.800.705.7255

This e-mail was sent to [EMAIL_ADDR] as a part of your Advanta BusinessCard membership. If you'd like to choose the kinds of e-mail messages you receive regarding special offers and promotions, or if you'd prefer not to receive future e-mail marketing offers from us, please click here.

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accept credit cards
as well as debit cards, gift cards and e-commerce transactions

- processing terminals and back office software
- 24/7 customer support
- enhanced transaction security

learn more

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employee card alerts
help you track spending

E-mail alerts deliver important account information directly to your inbox know when an:

- Employee Is Approaching Spending Limit
- Employee's Purchase Exceeds 50% of Their Limit

sign up for alerts