

# EXPERIENCE MAPPING

## The Honeymoon Period

### Case Study: Evaluating the New Investor Onboarding Experience

#### **BUSINESS ISSUE**

- A major financial institution knew they had a good on-boarding experience. They wanted to design a great experience to grow share of wallet.
- How do we identify channel-specific strategies to improve the new customer experience?

#### **APPROACH**

- Evaluated moments & assessed the journey across the first 100 days of the customer experience
- Combined individual ethnographic exercises with short “pulse” surveys using two separate platforms
- Drew nuances and emotions from individual stories

#### **STRATEGIC OUTCOMES & IMPACT**

- Identified three critical decision points allowing the institution to be more proactive in personalizing the experience with relevant communications.
- Designed an alternate customer centric communications program
- Optimized and rolled out the program further entrenching customers

# HONEYMOON PERIOD | EXPERIENCE MAPPING

Evaluating a Financial Institution's New Investor Onboarding Experience

