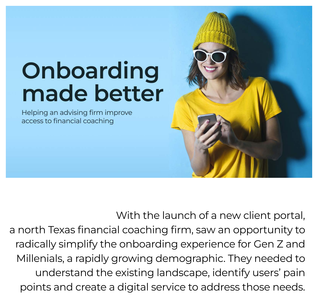
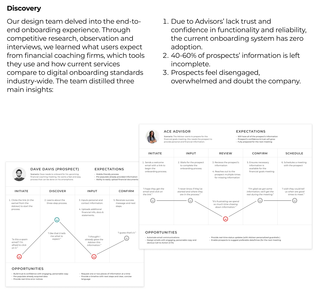


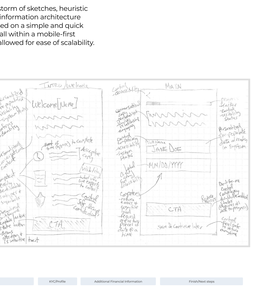
With the launch of a new client portal, a north Texas financial coaching firm, saw an opportunity to radically simplify the onboarding experience for Gen Z and Millenials, a rapidly growing demographic. They needed to understand the existing landscape, identify users' pain points and create a digital service to address those needs.

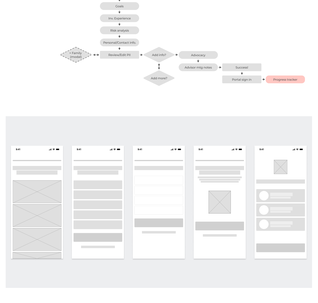


Discovery

Our design team delved into the end-to-end onboarding experience. Through competitive research, observation and interviews, we learned what users expect from financial coaching firms, which tools they use and how current services compare to digital onboarding standards industry-wide. The team distilled three main insights:

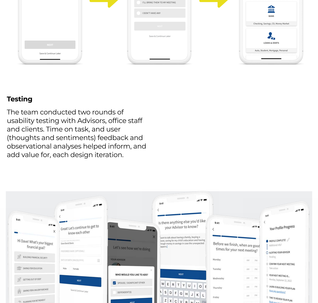
1. Due to Advisors' lack trust and confidence in functionality and reliability, the current onboarding system has zero adoption.
2. 40-60% of prospects' information is left incomplete.
3. Prospects feel disengaged, overwhelmed and doubt the company.





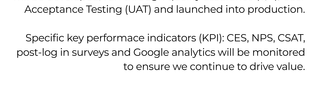
Ideation

Through a brainstorm of sketches, heuristic analyses and an information architecture rework, we focused on a simple and quick way to onboard, all within a mobile-first framework that allowed for ease of scalability.



Prototyping

We collaborated in a series of workshops to design convenient, self-service application. With clear, conversational language and a short-form composition, we created a personalized and streamlined experience with a do-it-for-me approach.



Testing

The team conducted two rounds of usability testing with Advisors, office staff and clients. Time on task, and user (thoughts and sentiments) feedback and observational analyses helped inform, and add value for, each design iteration.

'Having this link directly to our database will be phenomenal, cause I can't tell you how long it takes me to manually put all of that information in. I shouldn't be doing all of that data entry, especially because there's technology out there, like this, that can do this. I just find it exciting.'

Financial Advisor

'It looks great. It's really great to be able to complete on your phone. Seems to flow really nicely and is a good start.'

Current Client

For next steps, we'll continue testing, observing and iterating with target market prospects and Advisors. Upon acheiving the Minimum Viable Experience (MVE), designs will be developed, run through quality assurance (QA), User Acceptance Testing (UAT) and launched into production.

Specific key performace indicators (KPI): CES, NPS, CSAT, post-log in surveys and Google analytics will be monitored to ensure we continue to drive value.