Luis Barriga
Experience Design

Digital Project Presentation

Financial Wellness

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What is Financial Wellness

A tool that helps the company and its customers understand their financial wellbeing, how to maintain, improve, and educate them about their financial security.

For **Whom** is Financial Wellness

Primarily for the company's customers and their employers, it is also available to the general public and other prospective clients and customers.

Why is Financial Wellness Needed

Based on customer research a gap was identified; the need to help customers understand their financial situation and how it all fits into their short and long term plans, in particular retirement.

Where and **How** Financial Wellness

The company's culture is implementing financial wellness as one of their core values and offerings to their customers.
Initially the effort will be conducted only on member digital platforms and quickly expanding to the general public. Brand, marketing, sales and the business in general are currently being trained to support the new philosophy of helping their customers be "Financially well"

What are we solving?

Defining and clarifying the problem statement, there is a gap in the industry when it comes to a comprehensive and easy to understand financial wellbeing solution. This is coming directly from our customers and clients “Where can I go to understand my finances and how to better prepare for retirement?”

Validating and reassuring the problem with actual customers, worked with our product management and customer research teams to stand up and perform a “problem statement validation” effort.

Brought on board the rest of the functional teams like marketing, brand and technology to socialize the vision and get buy-in.

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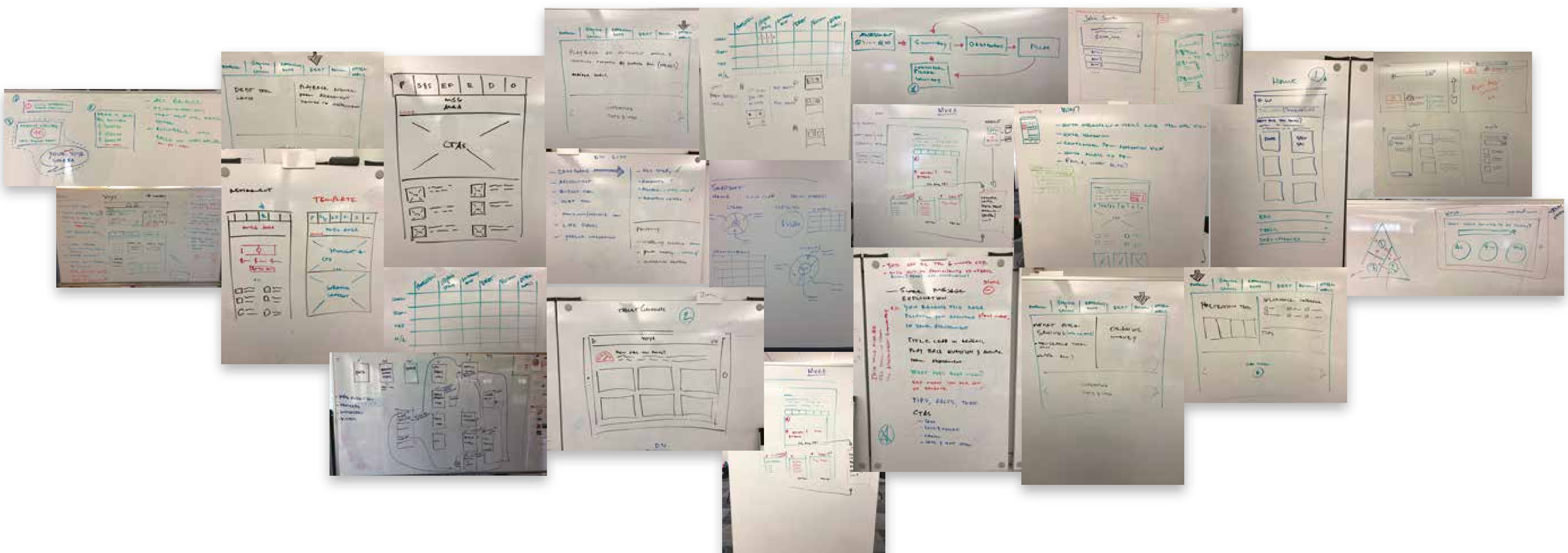
Ideation

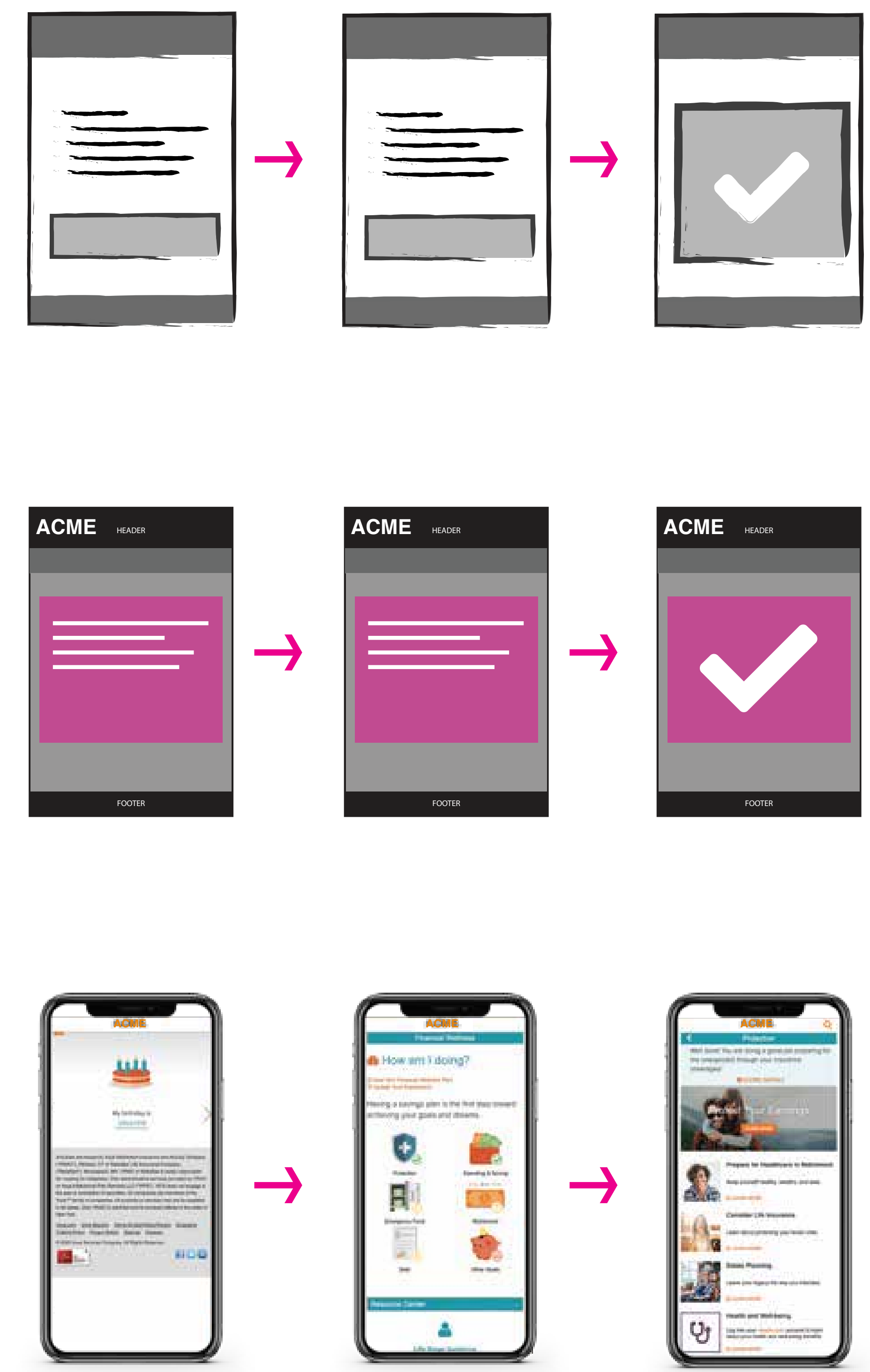
Jumping into competitor analysis, market research, card sorting and good old white boarding. Once we felt comfortable with our ideas we validated them with users, we also involved the technology team to participate and helping us to stay the course of feasibility.



The Design

Once we felt comfortable with our ideas we moved to the actual production of the design, with the following outcomes and artifacts:

- Journey maps
- Taxonomy breakdowns
- Demos, wire-frames and design annotations
- Visual comps and mock-ups
- Usability research
- Accessibility direction
- Style guides
- Pattern library updates
- Design system additions
- Success measurement and metrics



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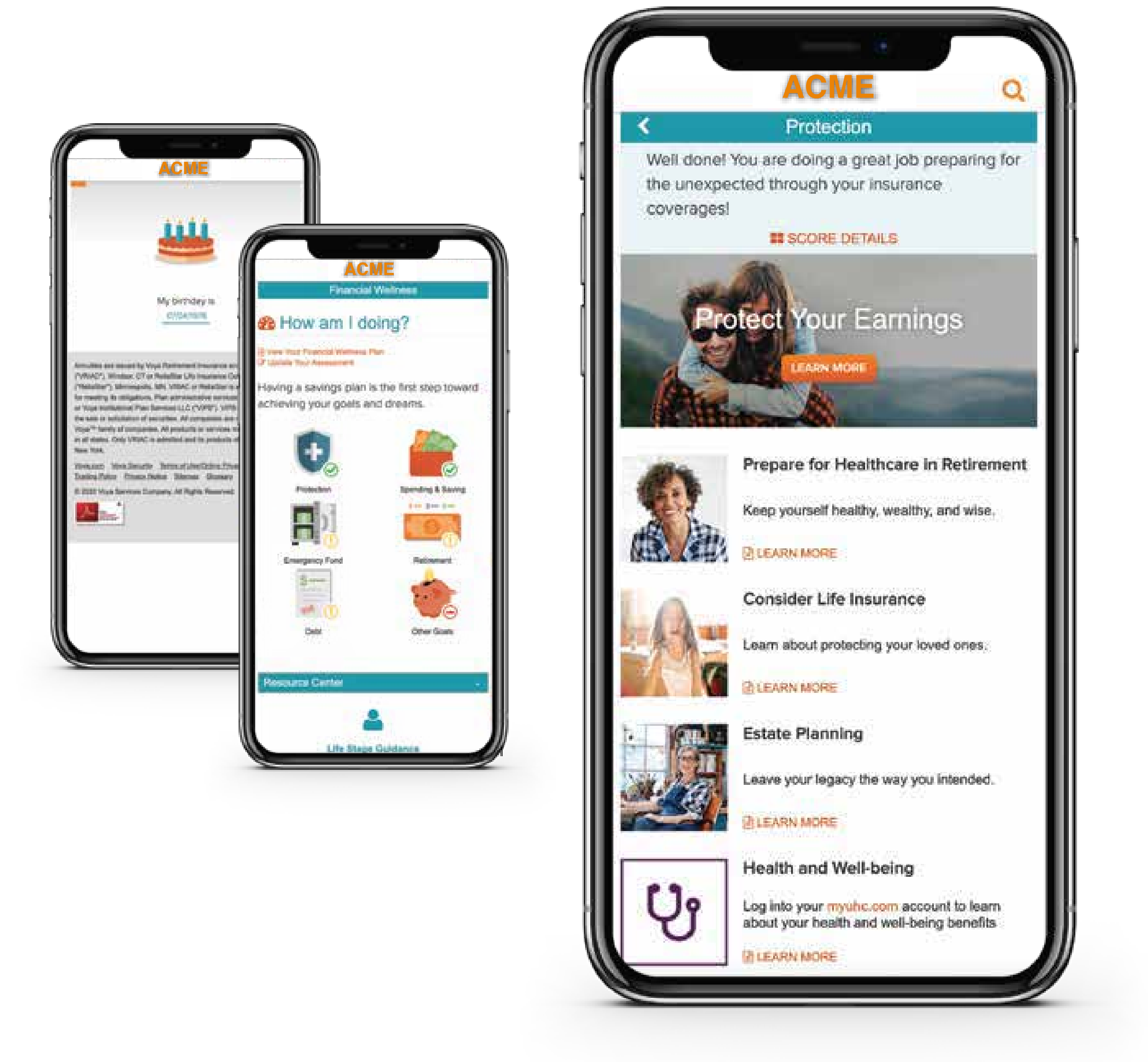
The End Product

An impactful product that is easy to use and brings value. By bridging the gap in understanding financial wellness, our tools help customers gain a more complete picture of their financial situations.

The tool not only drives better customer engagement, trust, and loyalty but also serves as a vehicle to promote business and enhance the overall customer experience. The simple yet elegant design is appealing, driving engagement, ease of use, and a joyful experience overall.



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Measuring Success

These high level metrics are based on 12 months worth of tracking after launch and marketing efforts. These are a combination of web analytics, surveys, customer support logs, marketing campaigns and client relationship managers.

Metric	Target	Actual
Increased customer participation	20%	38%
Customer’s financial confidence/awareness	5/10	6/10
Reduction in loans and withdrawals	20%	38%
Customer support logs	5%	7.5%
New business	50	13
Market perception	9/10	8/10

Thank You!