Journey Re-design for Integrated Experiences at a US WM Firm

**Key Challenges**

- The Advisor experience was fragmented which led to:
  - Inconsistencies within the same user journey made Advisors feel like they belonged to different platforms
  - Advisors were forced to learn new toolsets, adding to the cognitive load
  - Advisors spent more time and abandoned tasks due to the complexity

**Business Solution**

- Incedo Diagnostics : Data and AI solution for Digital Transformation
  - **Platform mapping** to identify the key touch points and interactions within the user journey
  - **Journey visualization** to gain a comprehensive understanding of the customer experience
  - Survey based data analysis for incremental improvement and prototyping of customer use cases

**Business Impact**

- **40%** Reduction in proposal steps
- **20%** Improvement in CSAT
- **8-10%** AUM growth

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