

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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