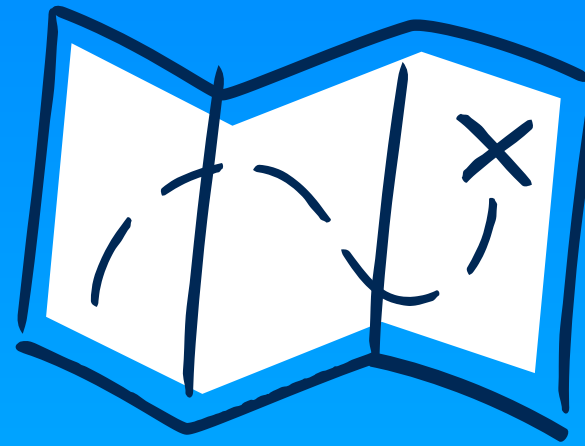


Innovation Toolkit



Customer Journey Posters

See your customer journeys differently.

Brought to you by:



Prospect

When prospects explore, compare and research advice businesses to arrange an initial meeting, so that their financial problem or need can be solved.

Touchpoint examples

- Referral partner
- Family or friend
- Your website
- Phone call
- Google
- Social media (e.g. Facebook, LinkedIn, Instagram)
- Online directories
- Meeting (in person or virtual)

Pain points

Think what is preventing your business from attracting more customers and making a better first impression. A customer pain point could be:

- Being overwhelmed with too much info
- Not knowing what info to trust
- Not having confidence with your website or social media
- Difficulties in finding a suitable time or location to meet
- Having a poor 1st impression (physical office/staff)
- Anxious to take the next step



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Discovery

This is when personal info is collected to create a personal strategy for the customer.

Touchpoint examples

- Meeting (in person or virtual)
- Online surveys
- Risk profile questionnaires
- Online calculators
- Bank statements
- Personal budgets

Pain points

Think what is making the process of collecting data and info from your clients difficult. A customer pain point could be:

- Not being able to locate the info
- Not having time to find the info
- Not understanding the questions being asked
- Not having the ability to answer the questions
- Not feeling comfortable answering the questions



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Advice

Recommended advice is shared with the client.

Touchpoint examples

- A meeting to present the advice
- SOA document
- Disclosure documents

Pain points

Think about the challenges faced in preparing the SOA and presenting the advice in a way that is simple for the client to understand. A customer pain point could be:

- Being confused by the strategy
- Not understanding how the strategy links with objectives
- Being overwhelmed by so many disclaimers and jargon
- Having to wait too long for its completion



Brought to you by:



Implementation

Getting all necessary documentation signed and delivered so you can implement the client strategy.

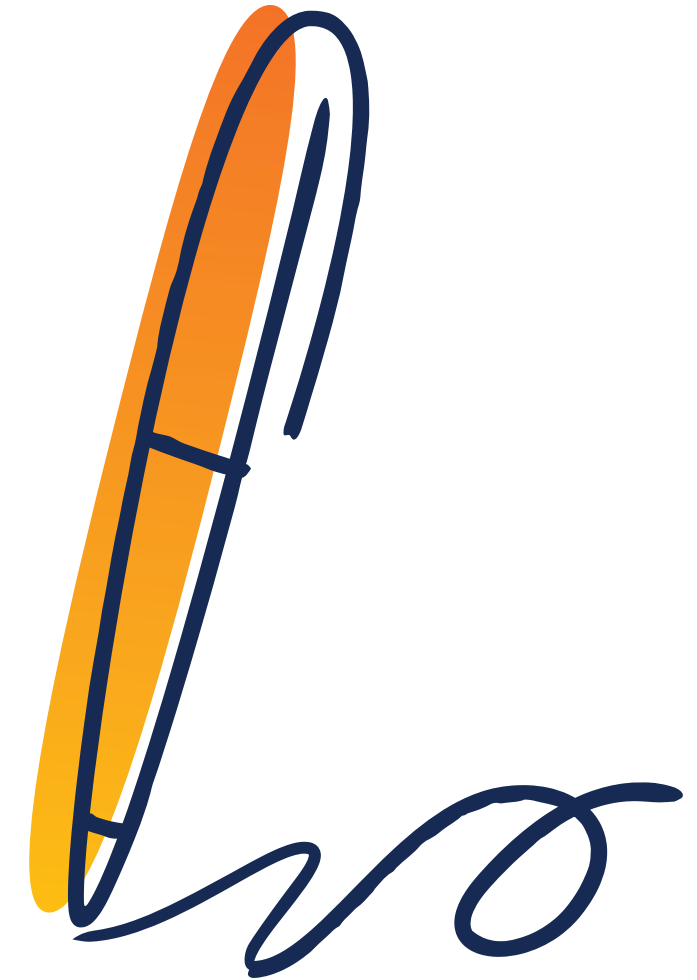
Touchpoint examples

- Execution documents, e.g. application forms, rollover forms, insurance forms
- Online eSignature
- KYC evidence
- Sign, scan and email or fax

Pain points

Think about what frustrations occur at this stage for you and the client. A customer pain point could be:

- Having to get multiple signatories
- Not having a printer at home
- Rework or time delays, because of uncertainty of certain elements of the document
- Not knowing when the advice has been actually executed



Brought to you by:



Engagement and education

Communication with clients post implementation to help them keep up with and understand their situation.



Touchpoint examples

- Client portal
- Reports and dashboards
- Meetings (in person or virtual)
- Calculators
- Newsletters
- Webinars
- Podcasts
- Events and seminars
- Chat-bots

Pain points

Think about how you can be more proactive with your clients. A customer pain point could be:

- Changing circumstances and objectives
- Being unable to understand the implication of a certain life or economic event
- Not using the customer portal
- Feeling unloved or even forgotten

Brought to you by:



End of financial year

Getting statements ready,
providing advice and
chasing key information
in preparation for tax time.



Touchpoint examples

- Tax return, SMSF audit, company accounts
- Meetings (in person or virtual)
- Online eSignature
- Sign, scan and email or fax

Pain points

Think what customers often find frustrating or confusing at this time of year. A customer pain point could be:

- Having to get multiple signatories
- Not having a printer at home
- Not understanding the outcomes of the return, audit or accounts

Brought to you by:



Periodic review

The annual or periodic client review to identify if the clients' strategy should evolve based on life's changing circumstances.

Touchpoint examples

- Meetings (in person or virtual)
- Email
- Bank statements
- Online surveys and tools
- Chat bots

Pain points

Think of information that is commonly missing that would be useful to know prior to the review or that is sometimes not revealed.

The customer pains point are similar to that of the Discovery process, but often require a little less data and info. So things like:

- Not being able to locate the info
- Not being able to answer certain questions, e.g. long term objectives



Brought to you by:



Name of the stage

Description

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Draw an icon here ↗

Touchpoint examples

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Pain points

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Brought to you by:

