

PERSONALIZATION HELPING CUSTOMERS SUCCEED

FUEL

October 4, 2017



Personalization is using
context, habits and preferences
to help a customer succeed.

Personalization Mission: Help Customers Succeed

WHO ARE OUR CUSTOMERS?

Once we identify who our target audiences are, we can learn more about their behavior, preferences and what they're trying to achieve. We will have a better understanding of customers' expectations of personalization and where the line is between valuable and creepy.

WHAT DOES SUCCESS LOOK LIKE?

Success in finances (and life) means different things to different people. Success also changes in timelines and priorities. Through conversations with our target audience, we can identify the opportunities in the customer journey to help them succeed.

The outcome will be an understanding the role personalization can play in customers' lives and how we can build it into our digital experiences.

WHO ARE OUR CUSTOMERS?

Understanding who we're designing for will lead to understanding of what success looks like for them



Define Design Principles

Avoiding mistakes in everyday financial tasks is the first step in a successful financial journey.



Define Aspirational Target

Making progress against defined goals, whether short term or long term, lead to confidence in a financial journey

WHAT DOES SUCCESS LOOK LIKE?

We believe financial success for people falls into 2 categories



Manage Daily Tasks

Avoiding mistakes in everyday financial tasks is the first step in a successful financial journey.



Achieve Financial Goals

Making progress against defined goals, whether short term or long term, lead to confidence in a financial journey

Opportunities & Pain Points



Influence on work streams

6X

Marketplace

Personalization