

STAGE	Discovery	Decision making	Getting prepped for account setup	Wait time	Support to get familiar with CWB's tools & processes	Online banking	
STEP	Learn more about CWB Compare against what they already know / other options	How do you pay your employees, accounts receivable. Aaron asks clients questions in order to come back and suggest the right account	Gathering necessary documents and signers Establish how they want their services set up	Send documents and signers over email	Credentials setup (a few days) 1-5, up to 2 weeks Learning how to do simple tasks	Set up all payees If using EFT - needs a different system. I need to learn it	There's more services here (up to 8) Charlotte and Aaron
ACTION	I want to incorporate new business Research with their close network and trust Start online	Unhappy with current banking (motivation) Look for an alternative: CWB		Provide all documentation Set up signers of the account	Signtaures		Many detailed actions to set up payees (check in with Charlotte and Aaron)
CHANNEL	advertisement referrals google search website community	branch (physical location) face to face marketing social media		board meeting email (sometimes)	email	documentation (how to's, user guides, youtube videos)	
EMOTIONAL JOURNEY	anxiety, uncertainty, not clear on what makes CWB stand out	separate logins for online platforms, they're overwhelmed	setting up something new	transfer / moving money			
BACKSTAGE	Look into SEO Gather info common things clients are asking for Promote clear information and benefits Tradeshows / campaigns / business events Product information before talking to someone Reach out to clients (calls / email / actually going to their business)	"It's not all about service charges. It's about what you're earning on the other side". Showing them the full package. Aaron Wire service promotions - we used to do that and still do it.	Aaron Ask about additional services, products, etc	Aaron makes sure the proof of owner of company is there, makes sure everything checks out, then go to get the signatures	Banking support SLAs Third party vendor SLA (service level agreement)	The majority of the day is spent in supporting clients on how to do things	