Design a portal for wealth managers that provide a strong customer experience
while simplifying the workflow across the many systems they need to use to interact with customers (CRM, Financial Planning, etc.)

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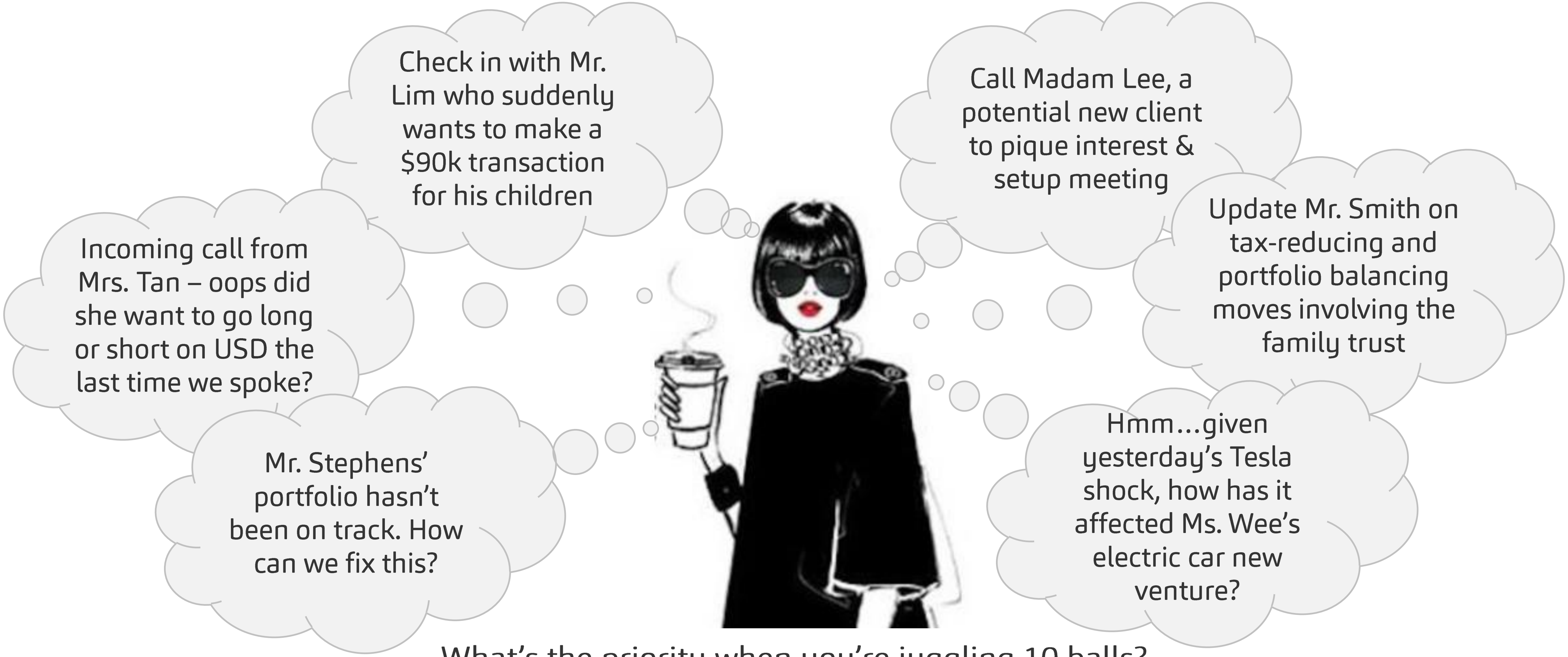
Meet Adeline

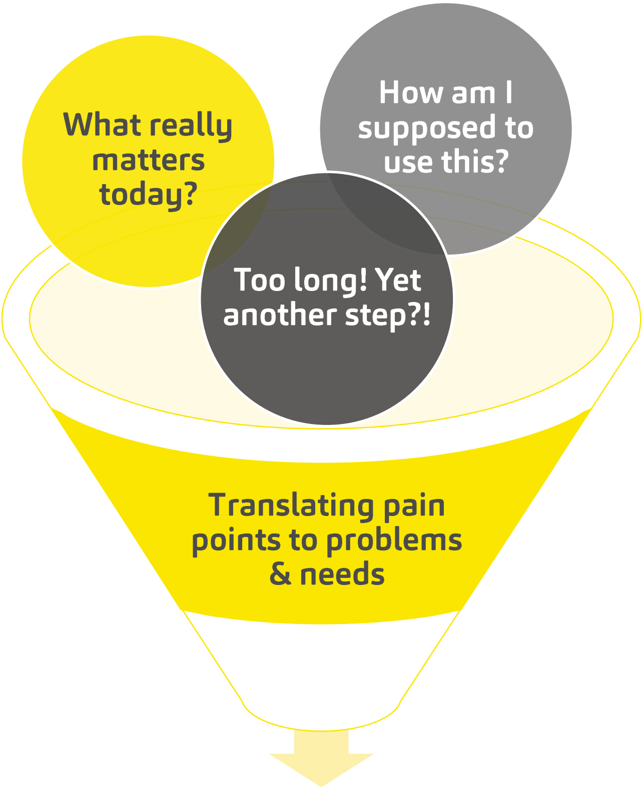
A wealth manager who needs the means to interact with clients in a way that makes her feels knowledgeable and personal because she does not have the capacity to remember everything off the top of her head



What's the priority when you're juggling 10 balls?
Aside from another cup of coffee…

Extra sets of brain (not just hands)

The 3 main focus areas



X-Wealth

- My top 3
- 3 is a charm
- It's socially rad!

01 My top 3

- Analysis paralysis when you are figuring out priorities in this fast-paced setup?
- AI-driven priorities list based on set strategy – Today's Top 3 Tasks
- More intuitive than often-observed "Urgent", "Overdue" in current advisor workbench
- Since it matters so much, it will be where your eyes first land on the portal – top left hand corner

02 3 is a charm

- I have been clicking more than actively listening to my clients and yet I'm not sure I've captured or pulled out what I need!
- Back to basic: the 3-click rule
- Auto-inclusion of most accessed, most reviewed shortcuts
- As you familiarize yourself with the portal, it learns more about you to improve your experiences

03 Socially rad

- I want to spend more time or have better interaction with my clients rather than being tied down to a system
- Social element to incentivize clients to use the portal so the WM does not have to keep switching communication channels
- Representative of off-system interaction and navigation – it is an extension of what you can do or remember

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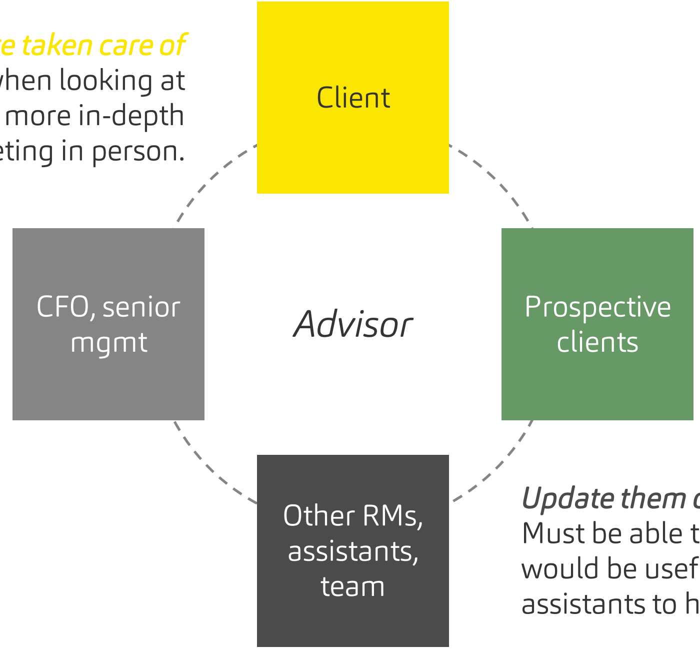
Understanding the user

Key purpose and stakeholders of an advisor

Key purpose	Goal: To provide financial planning services to their clients Strategy: Understand their client needs sufficiently in order to establish a relationship and build trust

Show clients that they are taken care of
Clients probably want a quick overview when looking at their portfolio online/over the phone, and a more in-depth review/ recommendations when meeting in person.

High level update on current and prospective clients, and escalations for large issues
Update mgmt. on overall portfolio standing and potential pipeline, with action plan to close off issues and win clients.



Show prospectives how much they can gain
Prospective clients must immediately understand how the advisor adds value to their portfolio/ lifestyle, and the short & long term gains. Probably needs example portfolios.

Update them on issues and successes
Must be able to highlight any important information that would be useful for the team, and give instructions to assistants to help serve clients.

Understanding the user

Schedule analysis

Latest news related to client portfolios, general industry macro trends, client life events

Tracking performance of all RMs, client portfolios , key highlights

Updates to portfolios, key highlights, recommendations

Updates on client performance, prospects pipeline, sales performance,

Read news/ client updates

Track team/ client performance

Client meeting

Sync up with other RMs/CFO

Clear emails

Sync up with assistant

Client prospecting (calls/ meetings)

Requires quick way to sieve through important/unimportant mails, reply quickly to relevant stakeholders

Instructions for the rest of the day, prep for client meeting, understand client life details, client's purpose of meeting,

Sieve out similar clients, generate leads, follow up on leads, provide quick insights/ recommendations at a glance

Not too relevant

The Empathy Journey / Acid Test

Meet the Wealth Manager (Client Advisor – UBS)

- Put in some scenarios (screens) and allow her to rate
- Observe interactions
- Find out pain points – spoken and unspoken

Simplified workflow

To brainstorm – link with features: *customer-interaction centric*

AS-IS	TO-BE