

Global wealth manager – we developed an end-to-end business model on digital wealth management for the client

Situation

- Global wealth management / private banking firm was aspiring to launch a **new wealth management service line through digital** in Asia
- There has been a few emerging players in the market, but basically it is a **completely new service model**

What we did

- Defined **target market segment** and assessed **market opportunity**
- Created **value proposition** tailored to each market segment
- Developed business model including defining **product/service** offering, **service channel** and **operating model**
- Designed **user interface based on customer journey**
- Developed **customer acquiring strategy** with focus on **digital marketing**

Digital marketing expertise



Fumiaki
Katsuki



Ryoma
Yamamoto



Raphael
Bick



Rachel
Rui Zhang

Impact

- A brand new business model which is expected to achieve **USD 35 billion local currency in 5 years**, and **positive cash flow in year 3**
- Agreement with joint venture partner** achieved
- Preliminary **user interface to be launched in 2017** after further refining by designers