### **Friction Points in the Onboarding Flow**

#### **1. Unclear Call-to-Action or Purpose on Landing Page**

* The login page has no indication of **what the user is about to access**.
* There's no headline, subheading, or tooltip saying:  
   *“You’ve been shared a link to the latest Index Rebalance Report — sign in or request access to view.”*
* This **misses the urgency or context** that would normally drive conversion.

#### **2. No Seamless Deep-Linking**

* The user is clicking on a **deep link** containing specific index, date, and report type info.
* However, on landing, the page **doesn’t reassure them** that they are in the right place or what they'll see after signing in.
* Worse, if they go through sign-up or request access, they likely get dropped into a **generic dashboard** rather than the specific report link.

#### **3. Barrier: Login Wall With No Lightweight Preview**

* A complete login wall is presented with no option to “Preview sample report” or see any teaser of the data they’re missing.
* First-time users are **asked for a password before they understand the value** of the platform.
* You’re losing the chance to build urgency or show differentiated value (especially for index analytics content).

#### **4. Confusing ‘Request Access’ UX**

* The "Request Access" button is vague.  
  + What’s the process after clicking this?
  + How long will access take?
  + What credentials or approvals are needed?
  + Will the report be emailed, or will they get access to the dashboard?
* No feedback or progress indicator adds **cognitive friction** and potential drop-off.

#### **5. Unbranded/Unpersonalized UX**

* For institutional clients or analysts, **trust and branding matter**.
* The login page shows a default-looking interface with minimal branding or visual cues to suggest that this is a trusted RBC Markets product.

### **Suggestions to Improve Conversion and Onboarding**

1. **Contextual Landing Page Based on Shared Link**
   * Detect if a shared link is opened by a non-logged-in user.
   * Show a custom message:  
      *“You’ve been invited to view the Canadian Preferred Share Rebalance Report for April 4, 2025. Log in or request access to view the full report.”*
2. **Add a Report Preview or Visual Teaser**
   * Let them see the **header, timestamp, or a few rows** of data blurred out — this is common in SaaS to hook the user.
3. **Streamline Request Access Flow**
   * Make the form inline (or at least one click away).
   * Set clear expectations: *“Access approved within 1 business day”* or *“Auto-approved for RBC clients.”*
4. **Retain the Deep Link Post Signup/Login**
   * Ensure the user is taken **straight to the shared report**, not just the generic home page.
   * Use tokens or session memory to redirect them post-authentication.
5. **Better UX Messaging**
   * Add trust signals: RBC logo, security message, etc.
   * Add microcopy near buttons like: *“Secure access to premium analytics”* or *“Don’t have an account? Request one in 10 seconds.”*