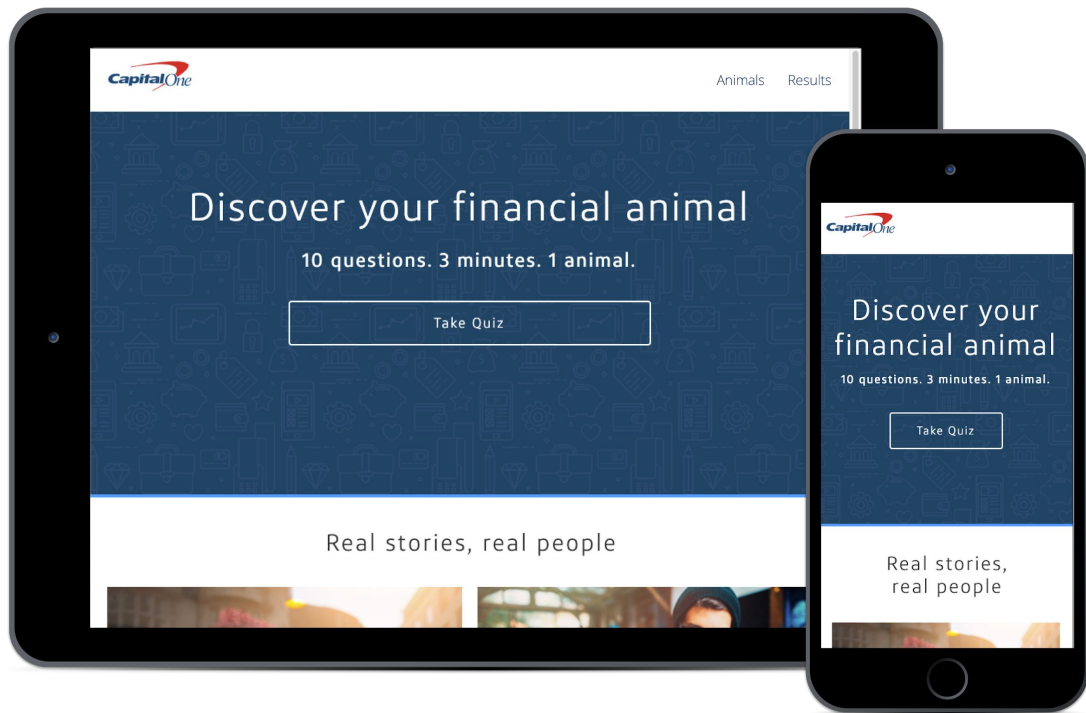

Financial Quiz

Stacey Gennoy . Lead Product Designer . staceygennoy.com

FINANCIAL QUIZ

Financial Quiz

Final Visual Design



Background

Capital One Cafes

- 30 Capital One Cafes across the nation
- Four employees on the floor (called ambassadors) ready to assist customers with servicing requests

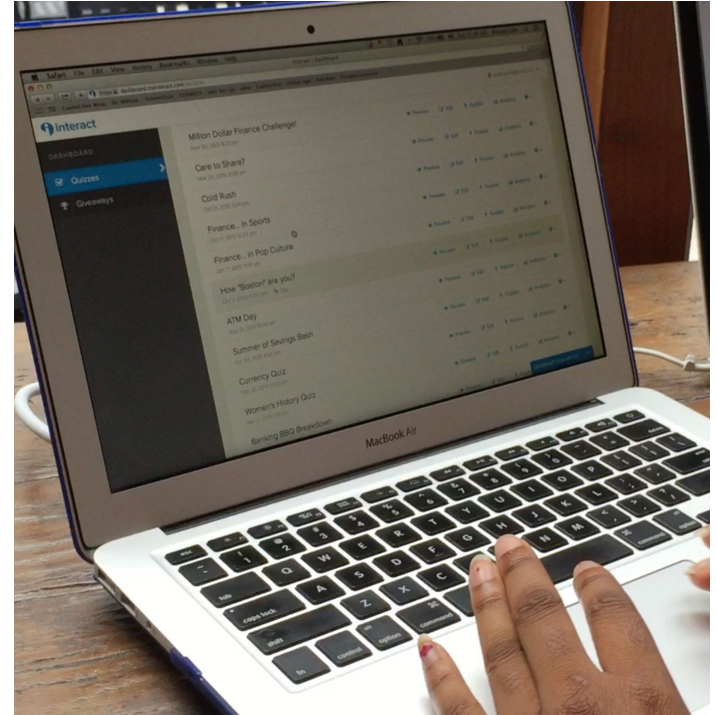
Capital One Cafe Employees are knowledgeable in all Capital One products.



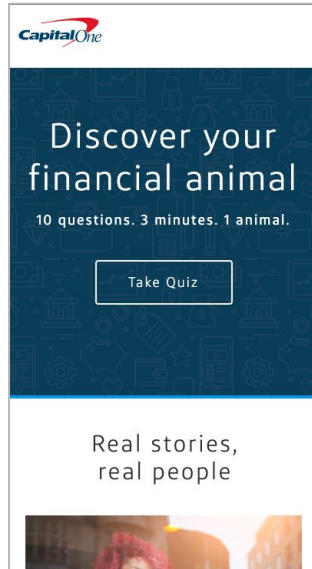
Problem Assessment

Outlining the main areas of improvement

- Ambassadors have a “discovery” process which is how they get to know a person. They want to know about how finances fit in the customer’s life. The process is cumbersome because they are asking people questions about their finances and people get uncomfortable or don’t know how to respond.



How it works



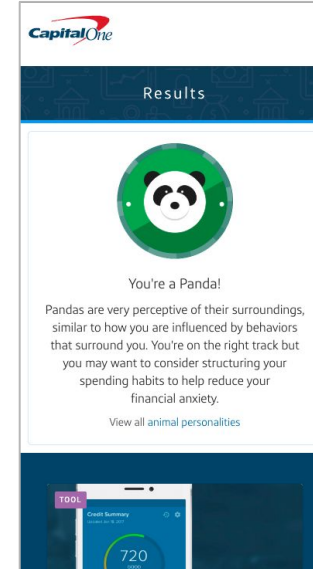
Entry points:

- Customer scans a QR code to the quiz
- Walks up to iPads in cafe



Selects Answers:

The customer answers ten multiple choice questions



Results:

- Receives a personality type
- Products and services are offered

Sketches



Initial Wireframes

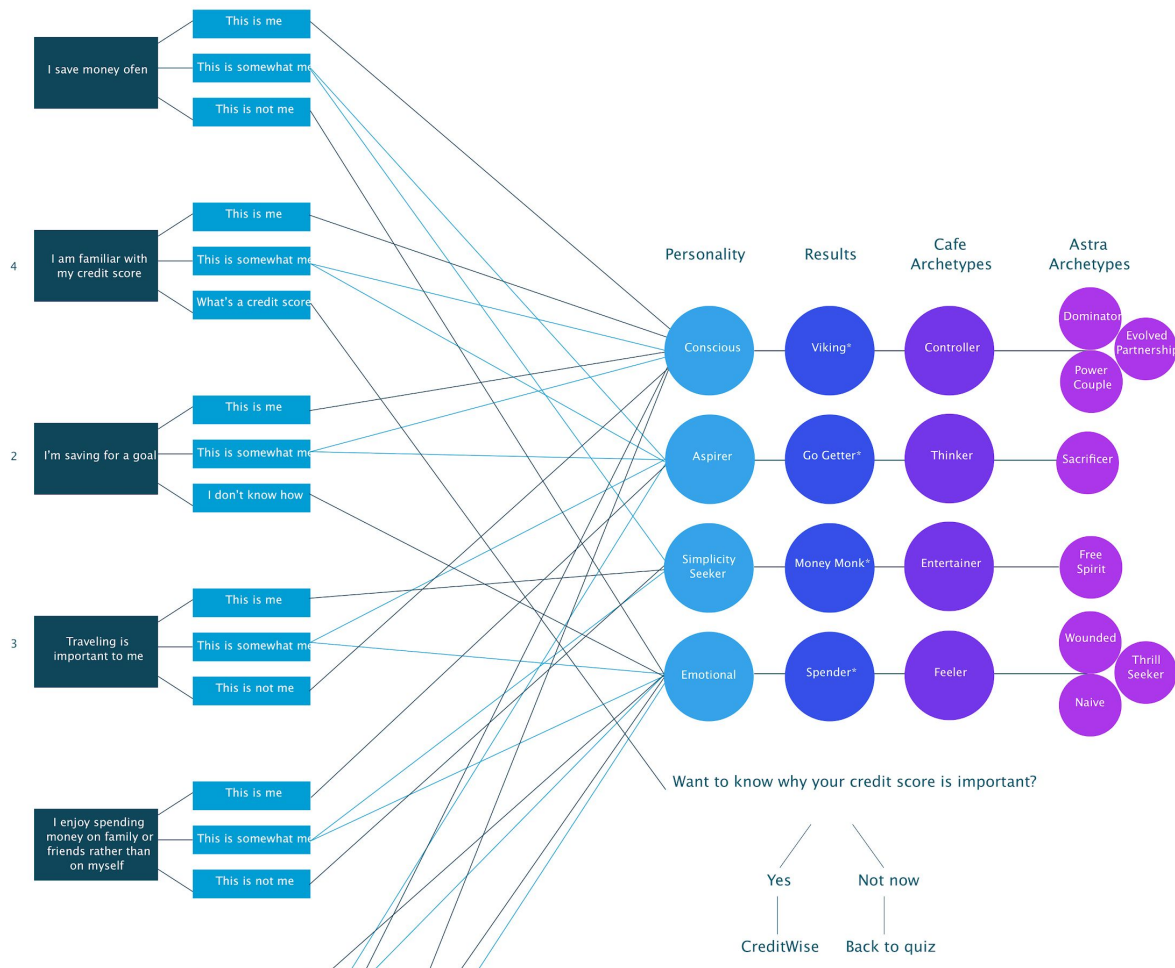
Validation Testing

- This “discovery” phase is the area I focused on for this project
- The quiz had 10 questions asking specifics around behaviors and decisions around money
- The results page displays a financial personality and information to relevant products



Logic

Each question aligned to a particular financial persona



Cafe Quiz

Success Metrics

- More than 80% of customers completed the entire user flow
- Increased associates' confidence to recommend a Capital One product
- Increased “visitor to lead” conversion by 20% through accurate product recommendations

