

Usability analysis to motivate and change consumer behavior

Improving the effectiveness of outbound communications to drive client acquisition and increased business from current clients in the financial services sector

Our client, a major provider of consumer financial services and investment solutions, was seeking to launch an enterprise-wide outbound marketing campaign to create a pipeline of sales prospects and drive cross-sell/up-sell of financial services products with current clients. Previous campaigns had not yielded the expected increase in client acquisition or increased business from current clients.

Our first step was to understand what the Customer Experience would look like for both segments as it related to our client's outbound marketing as well as potential triggers and motivators. To do this, we created a Customer Journey Map for both sales prospects and current clients. This enabled our client to understand critical touch points and identify messaging that would potentially appeal to both segments.

Then we analyzed campaign and consumer interaction data from our client's most recent outbound communications campaigns using data visualization techniques such as heat mapping to identify the drivers of the best and worst performing prospect and consumer campaigns.

A key learning was that consumers were spending more time on what were (for our client) lower value areas and messages than they were on higher value offerings and content – even in the best performing campaigns.

Armed with this new knowledge, our client completely revamped its outbound marketing campaigns with new messaging that would motivate consumers to “click-through” to learn more about its higher value offerings. This resulted in a significant improvement in client acquisition, increased business from current clients, a much-improved brand image and increased ROI.

