UX EXPERIENCE

RELATIONSHIP BRICKLET

BY

KARINA FRID

PROBLEM STATEMENT

As a client I want an easy way to connect with my advisor so that I can get guidance around my financial situation.

I didn't have a choice in who my advisor was and currently I find it difficult and time consuming to schedule appointments with my advisor.

That makes me feel like I don't have control over who I discuss my finances with and the difficulty in setting up appointments sometimes makes me procrastinate in meeting with my advisor.

HYPOTHESIS

We believe that by pairing the scheduling funcionality with an advisors information, it will lead to more self scheduling appointments and therefor a better relationship.

Additionally allowing for costumers to self-schedule appointments provides advisors more time to focus on meaningful interactions.

ROOT CAUSES

Clients have to call to schedule an appointment and this process can be very long and annoying.

TARGET

Increase the amount of self-scheduled appointments made by Premium Covered clients from 12% (Bricklet+CAS) to 25% by the end of Q2 2019.

Bricklet 9%
CAS 3%
Phone 34%
E-mail 54%
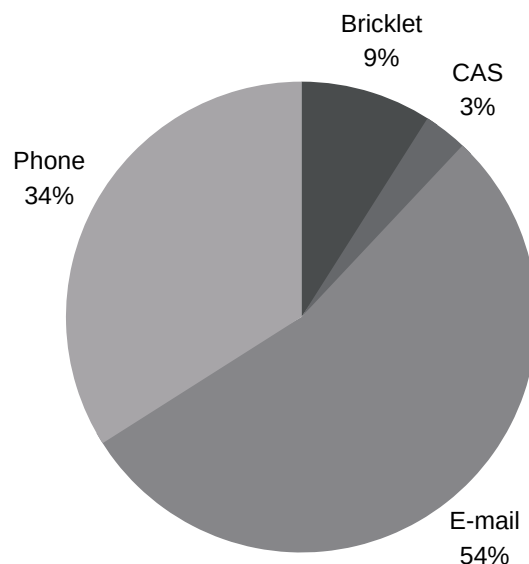
COSTUMER JOURNEY

For the Relationship Bricklet we will focus in step 3 and 4, but it is important to understand the full journey to know what Sally needs.

A-ha Moment

1 — Wondering about retirement

I find myself wondering about retirement a little more often these days.

Organize, Explore & Evaluate

2 — Exploring and organizing

I mean, is retirement even a viable option for us?

3 — Scheduling an appointment

When checking my accounts, I noticed a link to 'Book an Appointment' with our Fidelity Advisor, Christine.

Create Our Vision

4 — Starting to plan with an advisor

Ben and I meet with our advisor, Christine.

5 — Gathering information

I filled in some of the expense information that we didn't know off the top of our heads when meeting with Christine.

6 — Assessing our current state

Christine's current state assessment helps us talk through assumptions Ben and I made.

Build Our Approach & Validate

7 — Discussing decision points and actions

Christine's current state assessment helps us talk through assumptions Ben and I made and where we weren't on the same page.

8 — Generating a list of to-do's

As an outcome of the plan, Ben and I agree to create, review, and complete a to-do list.

Implement Our Vision

9 — Implementing high-priority to-dos

our 'To Do' list helps us to feel like we're taking the right steps.

Monitor Progress & Evolve

10 — Monitoring her status

We see how we're progressing towards our goals when we log into fidelity.com.

11 — Receiving communications from Fidelity

Ben and I separately tailor the format and frequency of follow-ups with Fidelity, and agree to an annual meeting with Christine.

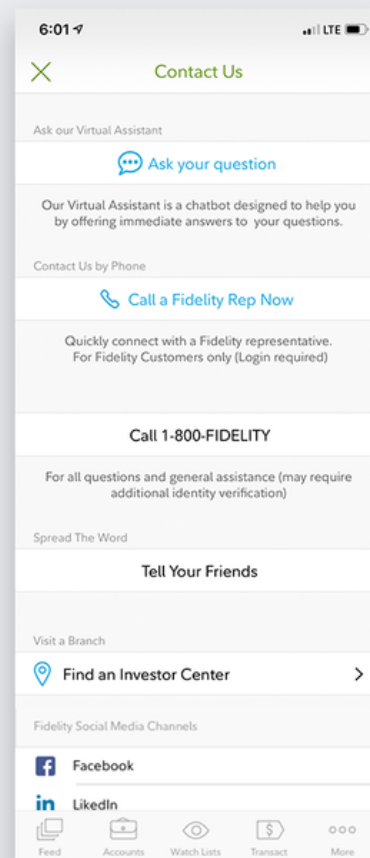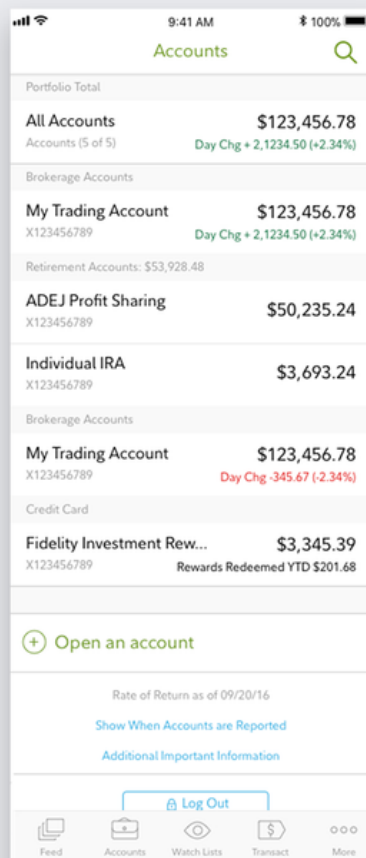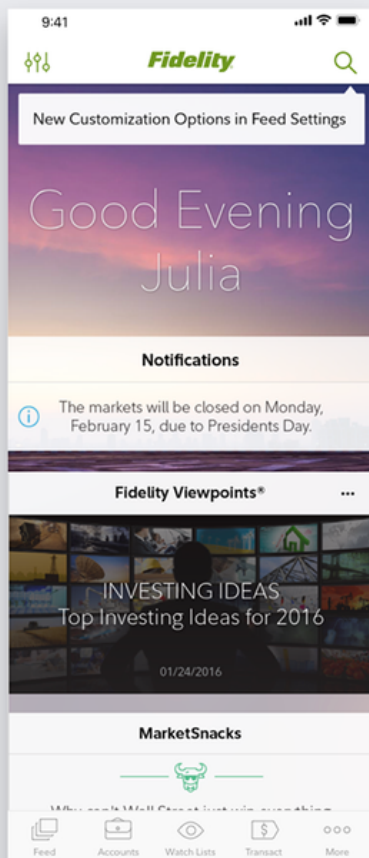### 12 — Experiencing unexpected life events

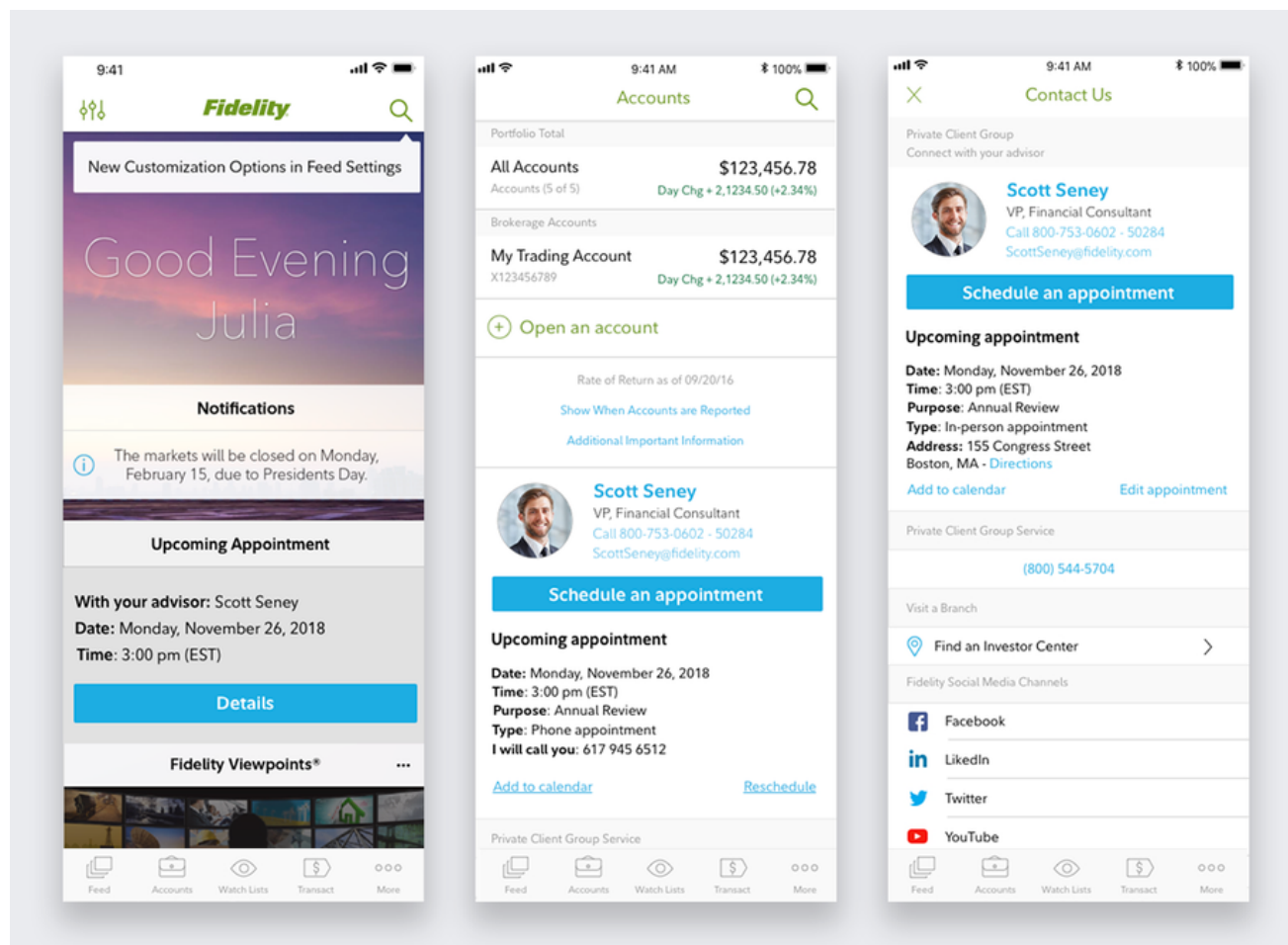A year goes by and our daughter announces she's getting married!

INTEGRATION

Screens where the Bricklet will be added:

- Feed (Only when there is an appointment scheduled)

- Accounts

- Contact

SCREENS TODAY

OUR PROPOSAL

"As a client I want an easy way to find my advisor's contact details so that I can quickly connect with them when I need to"

MVP I
Embed Advisor contact information into fidelity.com mobile experience for covered clients

MVP II
Embed "Find an Advisor" option into fidelity.com's mobile experience for uncovered clients, so they can have access to the Bricklet in the future.

MVP III
Embed upcoming appointment details and management capabilities into fidelity.com's mobile experience for covered clients.