



THE BEST SERVICE STARTS WITH UNDERSTANDING THE CLIENT JOURNEY

Visual journey mapping helped a Vancouver-based boutique financial services company elevate its banking experience.

CLIENT BlueShore Financial LOCATION North Vancouver, BC WEBSITE www.blueshorefinancial.com INDUSTRY Finance & Insurance

SERVICES RENDERED



STRATEGY
Personas
Experience Maps



RESEARCH
Stakeholder Research
Customer Interviews



DESIGN
Visual Design



TRAINING
User Experience Research
Experience Mapping

CHALLENGE

As a regional credit union, BlueShore Financial operates in a highly competitive sector in a crowded metropolitan market. To differentiate itself, the organization aims to deliver a unique client experience with outstanding personalization and service. Achieving that to the fullest required deeper insight than its traditional market research was providing. So BlueShore called on Akendi.

APPROACH

Our team conducted extensive interviews with BlueShore Financial's clients and stakeholders to learn more about their needs and experiences. We then developed personas and experience maps to provide a rich, strategically valuable picture of key BlueShore client journeys — account opening, new mortgage and investment consolidation. Our visual presentation of this information gave BlueShore a clear view of its strengths and opportunities for improvement.

IMPACT

The new personas and experience maps plus training from Akendi on how to use them helped BlueShore fine tune its services and improve client engagement. Our in-depth research revealed that new clients referred by mortgage brokers required a completely different onboarding experience. BlueShore implemented a new process to introduce these clients to the full range of products and services available to them.

“WE’VE ALWAYS PRIDED OURSELVES ON OUR EXCEPTIONAL CLIENT SERVICE. AKENDI’S RESEARCH HELPED US FOCUS ON SPECIFIC, ACTIONABLE WAYS TO RAISE IT TO THE NEXT LEVEL.”

Catharine Downes VP, MARKETING