

Client Example - Financial Services

Challenge

Collier Sustainable Wealth Management needed a website and brochure makeover, especially in light of peoples' recent negative experiences and perceptions with banks and financial institutions.

Solution

Create personas to represent future customers. Interview prospective customers to capture voice of the customer. Write emotional copy for web and print. Create visual client relationship journey map to visualize key touchpoints. Create opportunity map that shows how to create more remarkable experiences for different audiences.



Company

*Personalized
Local Service
with a
Fresh Global
Perspective*

Tagline



Audience
Personas



Collier Difference

Results

- New website and brochure with emotional copy that connects with audiences
- Opportunity map guides improvements



Website copy: www.collierswm.com