

# CUSTOMER LOYALTY SOLUTION

Financial Services



3radical has developed a **Customer Loyalty Solution** that helps Financial Institutions attract and retain younger, digitally savvy investors who are seeking to better engage with their investment portfolio using digital channels.



## Challenge

How do you differentiate your investment solutions in order to attract and retain the younger audience?



## Key Objectives

- Provide an experience that helps younger investors develop their knowledge and understanding of investment portfolio management.
- Attract younger investors to take up company products and services.
- Use the mobile digital channel to better engage with this audience.
- Provide valuable information and resources that enhances the overall service offering.
- Deliver a compelling and immersive experience that is fun and valuable, and that builds long-term loyalty.

# BEST PRACTICE APPROACH

The 3radical Voco platform provides an engagement experience for young investors that is informative, valuable and fun by:

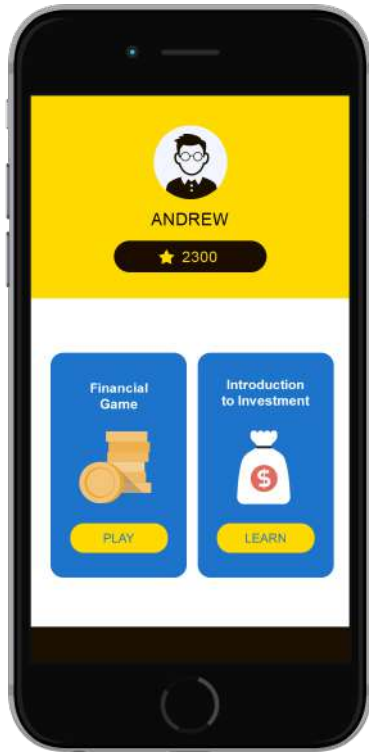
- Providing a mobile app with a highly rewarding and immersive engagement experience
- Delivering a learning game that is fun to play but also builds knowledge and skills that are highly valuable for future portfolio management
- Embedding “Test and Learn” principles into the game to encourage investors to come back and try again
- Using real market data and to make the simulation as real-life as possible
- Rewarding users based on in-app behaviour to motivate repeat engagement and desired portfolio management behaviours



## BENEFITS



- ★ Acquire and retain a greater number of young investors
- ★ Increase the level and frequency of interaction with these investors
- ★ Increase levels of trust and customer satisfaction
- ★ Help investors become more knowledgeable about investment decisions
- ★ Build an emotional connection by providing experiences that are informative, fun and valuable



## IMPLEMENTATION

- Agree scope and timelines
- Confirm overall purpose
- Identify specific goals
- Qualify metrics to be used
- Establish principles of portfolio game
- Agree and develop key content
- Map-out investor engagement journey
- Identify preferred mechanics
- Confirm tactics for recognition
- Agree on rewards to be offered
- Confirm team collaboration and sharing
- Develop roll-out / launch plan
- Implement programme

## TIPS & TRICKS

- ✓ Enable data to be updated to keep the simulation inline with actual market trends
- ✓ Enable users to compare their achievements with others, to create a competitive element

- ✓ Continually introduce new rewards and incentives to motivate ongoing participation
- ✓ Provide resources that complement the game and further build knowledge and insights for the investors



Easy to implement



Pre-defined templates



Unique portfolio management simulation game



Multitude of behavioural mechanics to choose from



Seamless integration with other systems



Journeys and engagements can be customised based on in-app behaviours



All forms of rewards can be offered

3radical is THE AUDIENCE ENGAGEMENT COMPANY. We are focused on getting and keeping an individual's attention in today's increasingly noisy and complex world, thereby driving desirable behaviours and outcomes.

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