

Solutions Catalogue

Wealth Management

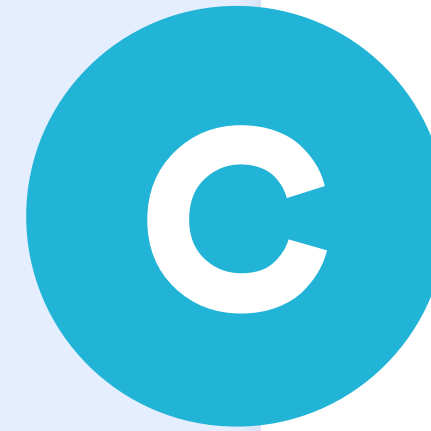
2024

 atomic.io

Introduction

Atomic.io offers a solution to enhance wealth management customer journeys with minimal friction.

This guide is designed to present some of our most popular wealth management use cases for Atomic.io, organised within our C.A.R.E. framework.



Convert

Provide tailored promotions and proactive self-service choices that are easy to respond to, enabling customers to seamlessly accomplish more within your app.

- ▶ [Self-Service](#)
- ▶ [Offers & Promotions](#)
- ▶ [Data Capture](#)



Activate

Send high-priority alerts, drive activation, and nudge customers to engage instantly.

- ▶ [Alerts & Approvals](#)
- ▶ [Onboarding & Activation](#)
- ▶ [Nudges](#)



Retain

Highlight customer insights, enquiries, and rewards that create a compelling path to action within your app.

- ▶ [Insights](#)
- ▶ [Outreach & Surveys](#)
- ▶ [Loyalty & Rewards](#)



Engage

Deliver relevant updates that anticipate individual customer needs at just the right time in your app.

- ▶ [Announcements](#)
- ▶ [Personalised Updates](#)
- ▶ [Education](#)



Action Cards

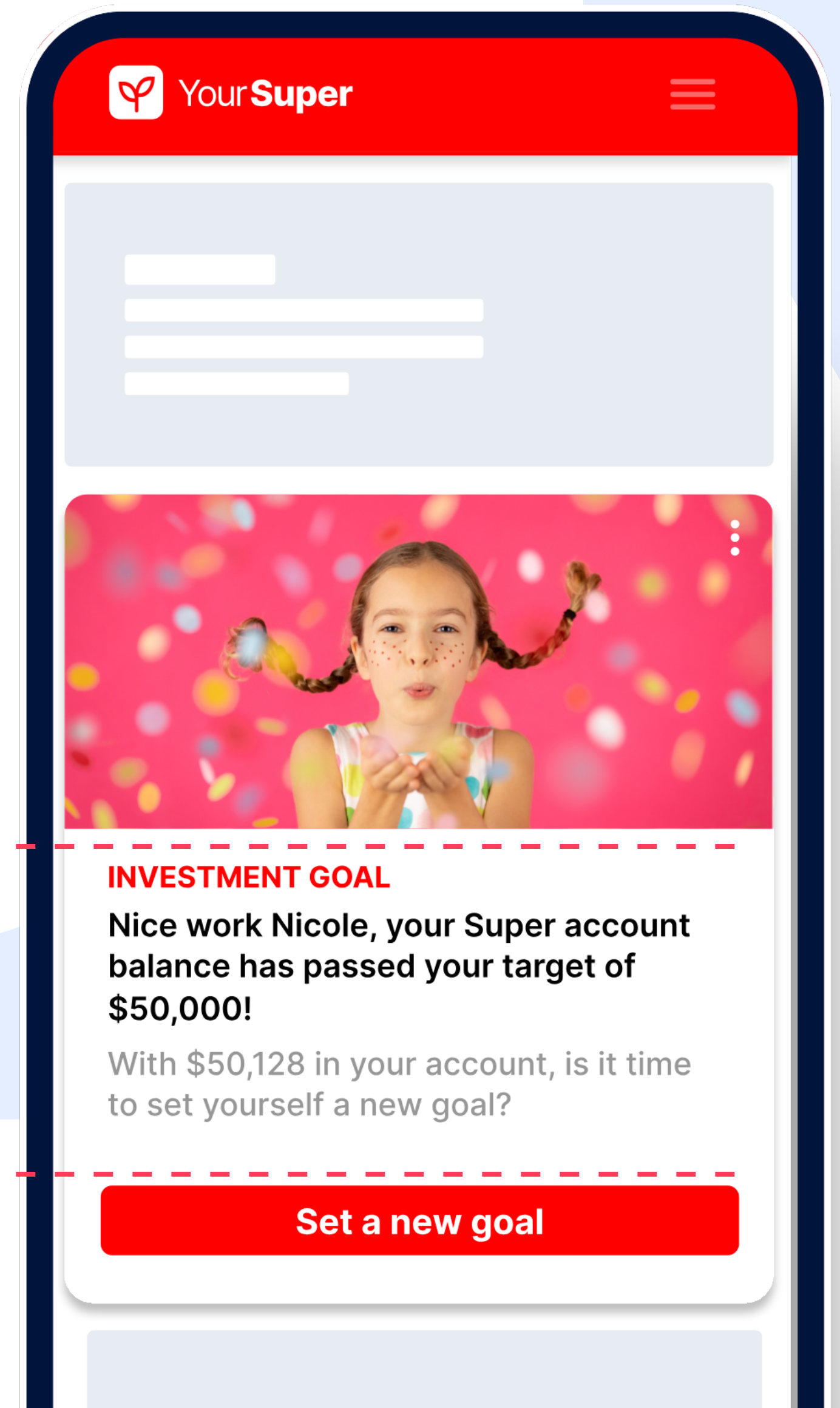
Let's begin by explaining why Atomic.io is the leader with in-app communication: action cards.

With Atomic.io action cards, you can efficiently convey both the message and its corresponding action in a unified interaction. This approach has proven to lead to higher conversion rates and heightened customer satisfaction.

Essentially, we include both the TRIGGER and the ACTION on a single card.

The **TRIGGER** is a push from a system [easy] but needs to be hyper-personalised [hard] to work well.

The **ACTION** is a real-time, two-way connection – enabling inputs from the card directly back to your systems. [hardest]





Self-Service

WHY IT MATTERS

“57% of customers prefer to engage through digital channels”

Source



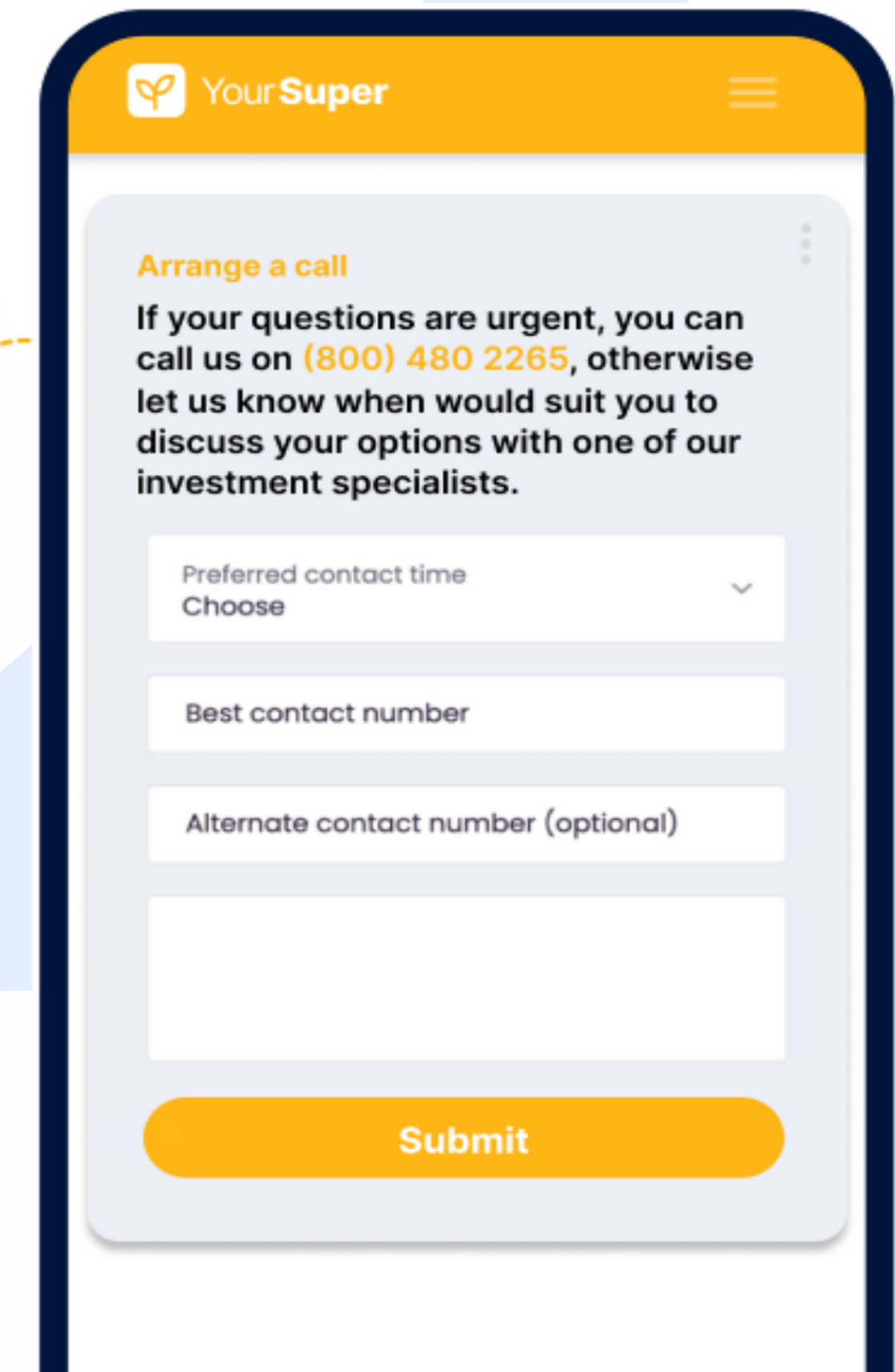
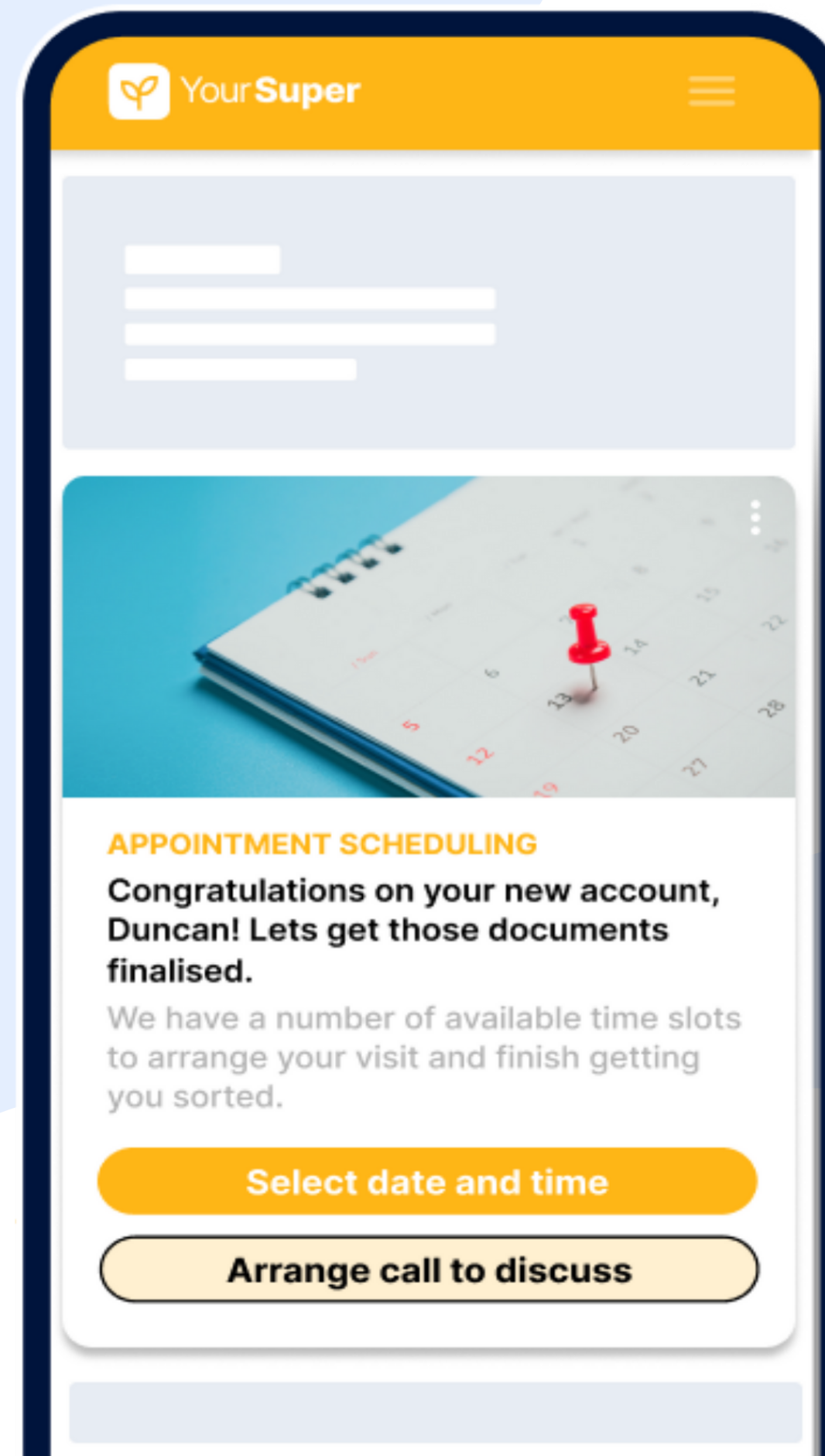
INCREASE CONVERSION

Self-Service

Appointment Scheduling

Let your customers experience the convenience of secure and efficient appointment booking from right inside your app.

Elevate your business operations with card subviews, seamless drop-downs and various input options, enabling your customers to book a call or appointment instantly.



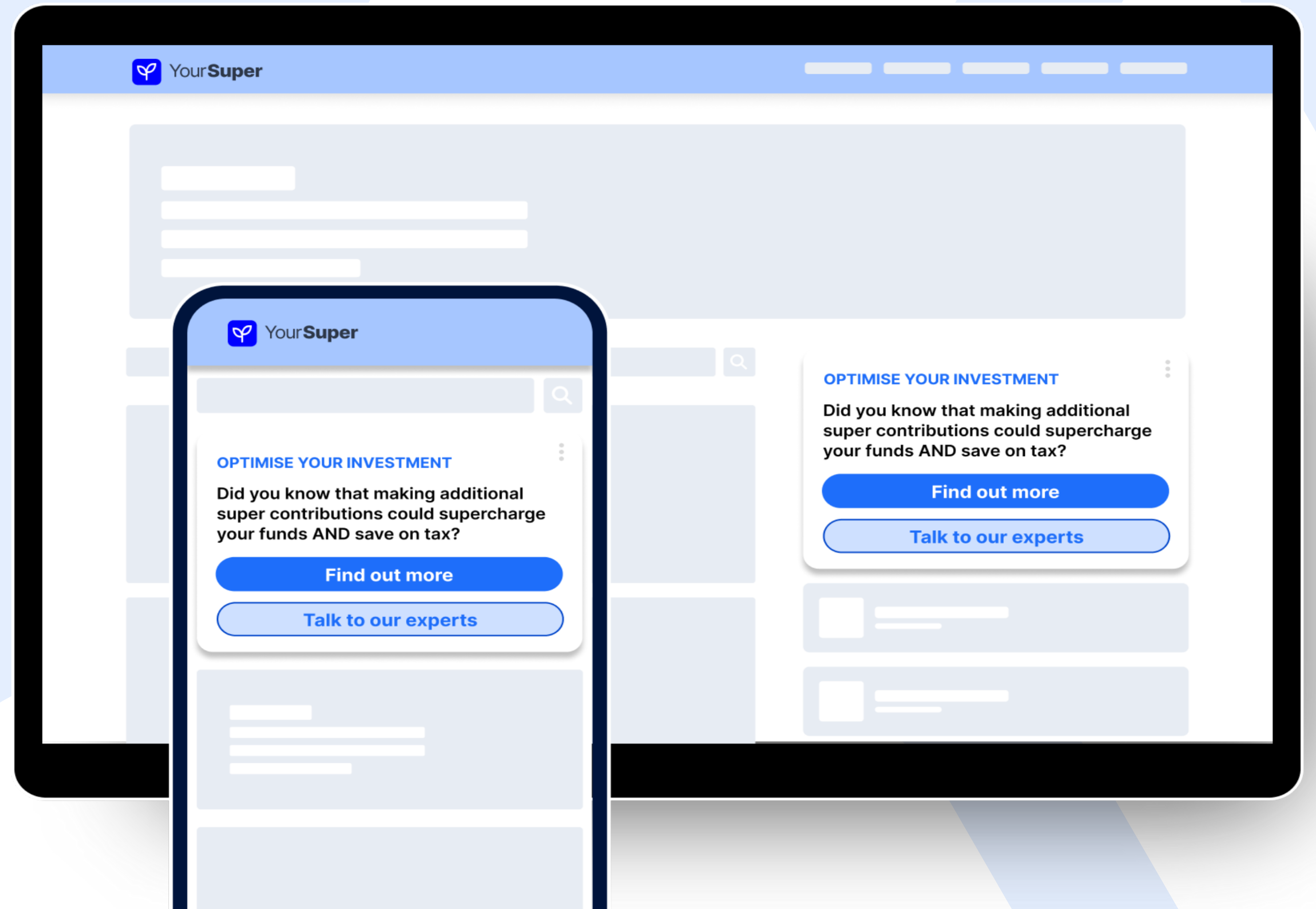


INCREASE CONVERSION

Self-Service

Investment Options

Present investment optimisation opportunities at just the right time, allowing customers to take direct action within the card itself. Streamline decision-making and increase conversions for a seamless and efficient investment experience.





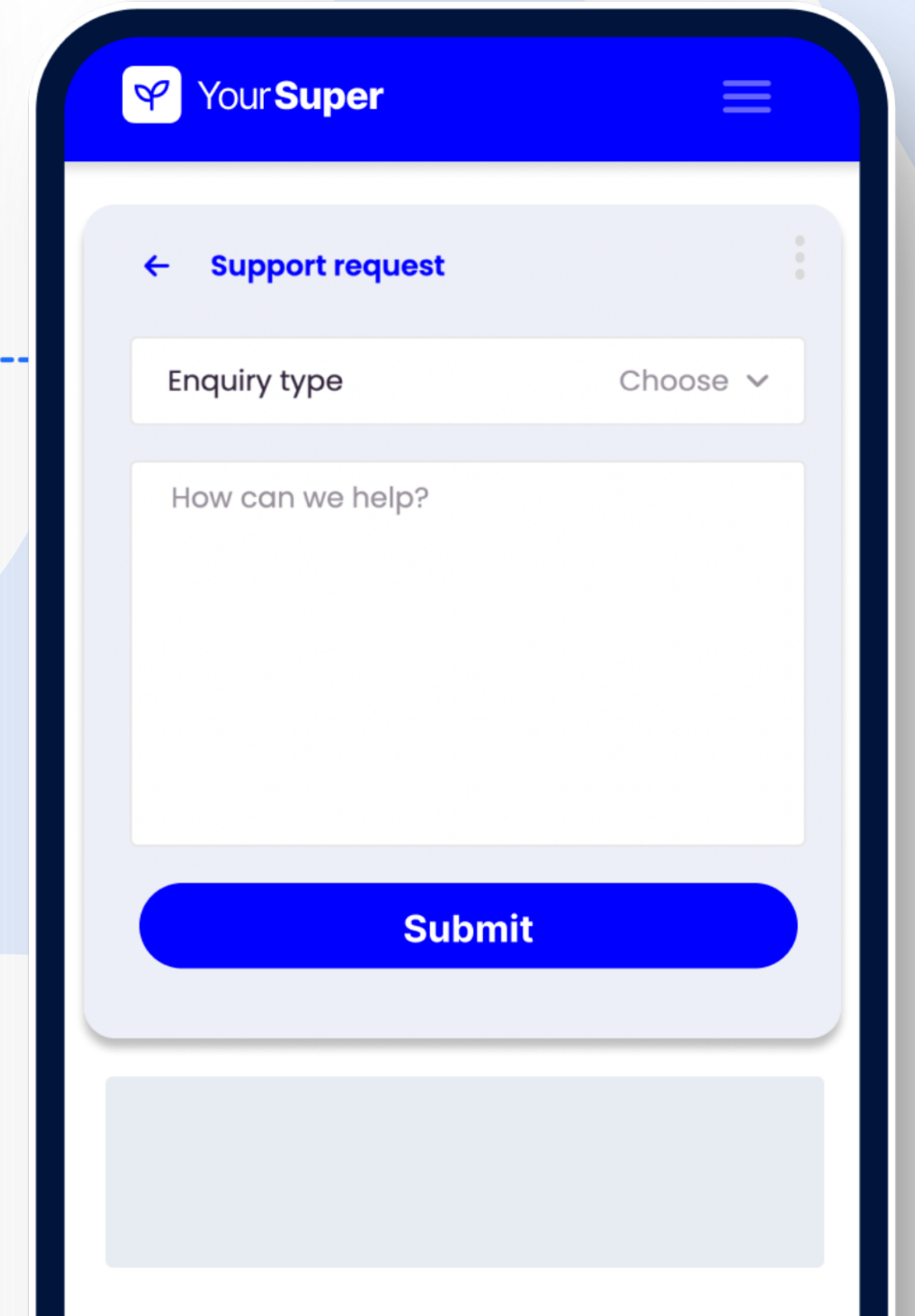
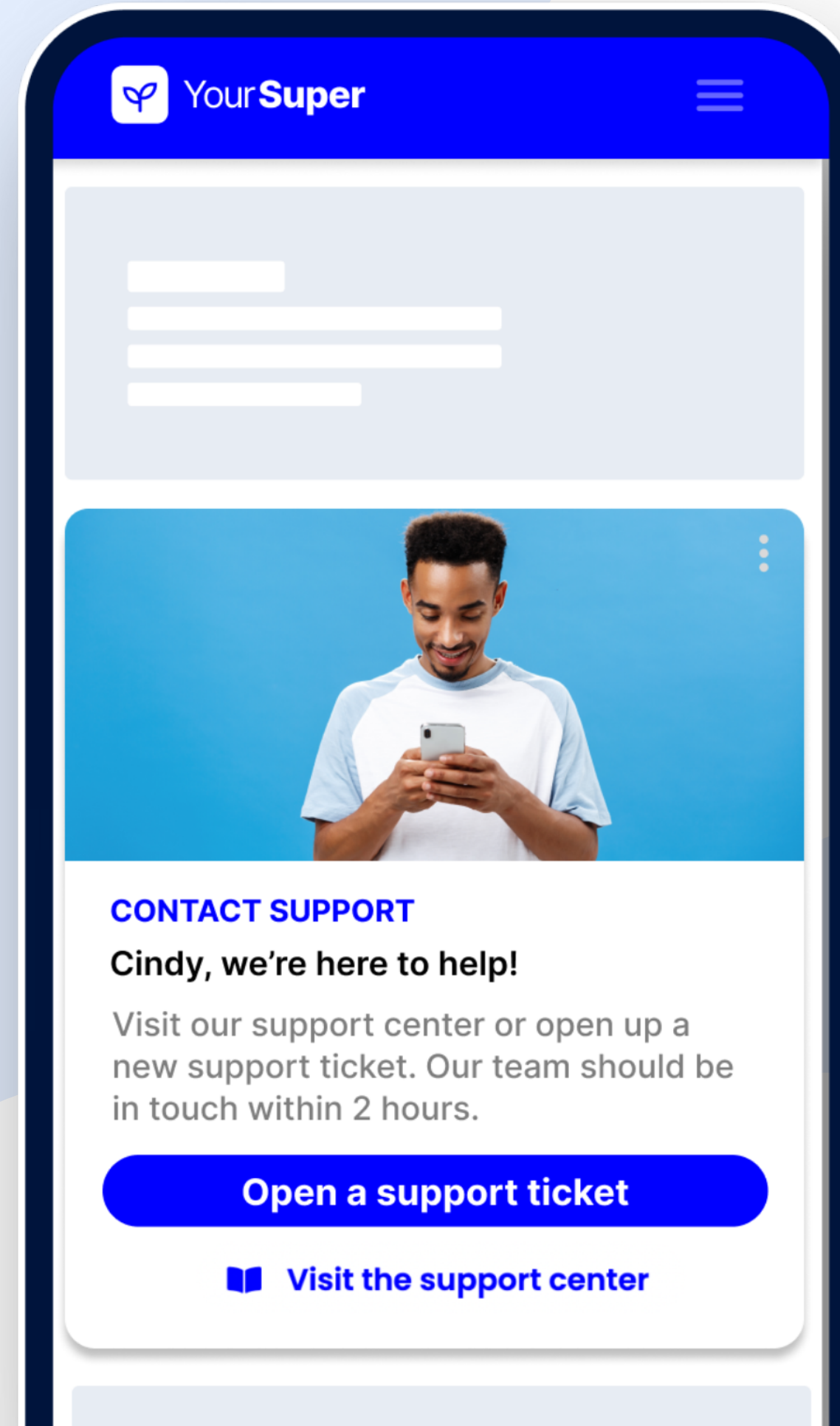
INCREASE CONVERSION

Self-Service

Customer Support

Empower customers with self-service support within your app. Whether raising a ticket for personalised assistance or exploring your comprehensive Support Centre, users can effortlessly address their concerns independently.

This user-centric approach enhances efficiency, giving customers the autonomy to resolve issues seamlessly, all without leaving the app.



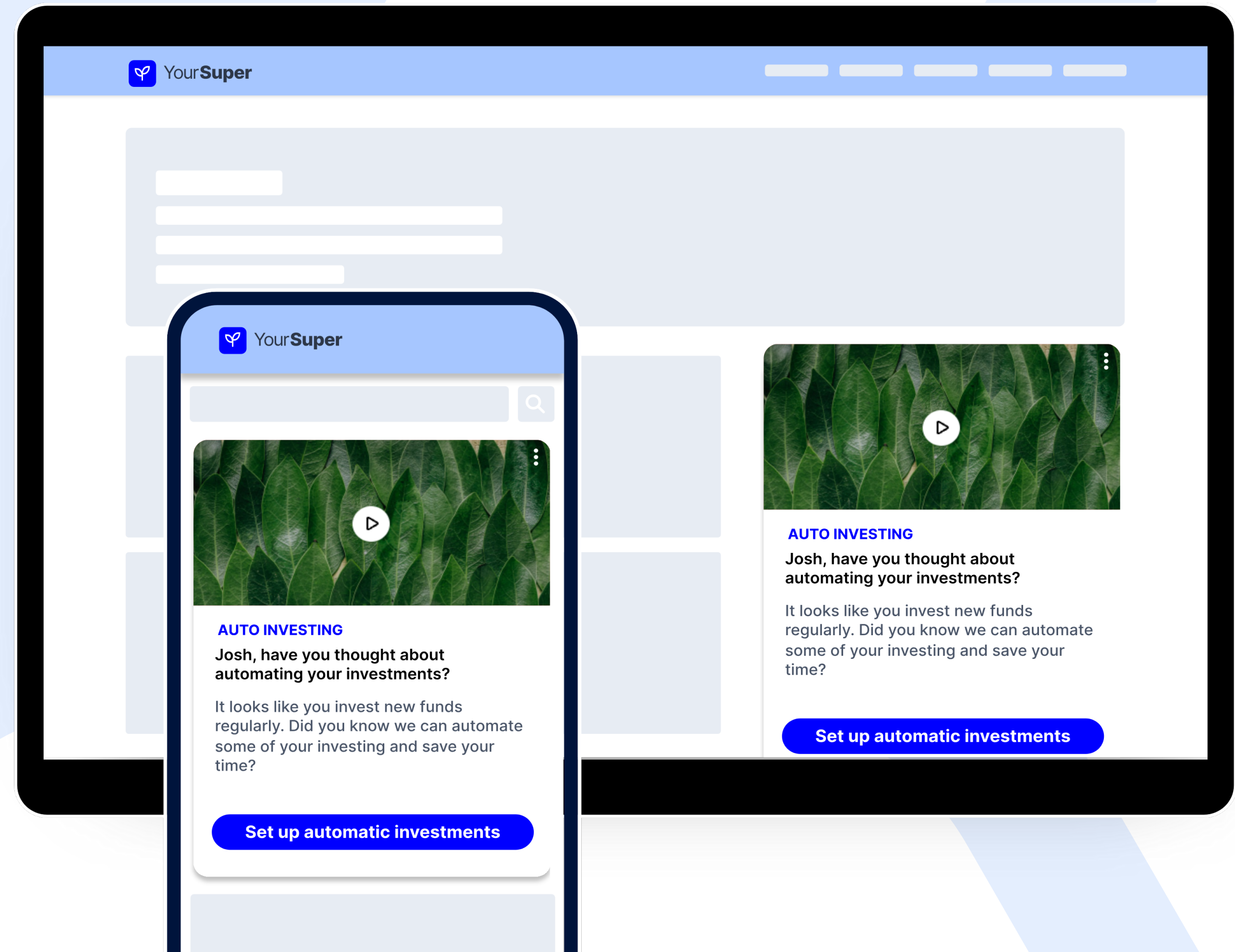


INCREASE CONVERSION

Self-Service

Automated Investments

Let your customers streamline their individual wealth management processes with automated investing. Remove unnecessary admin while giving them a sense of control over their money, creating a tailored approach to their investing.





Offers & Promotions

WHY IT MATTERS

“65% of consumers expect to be offered targeted promotions”

Source

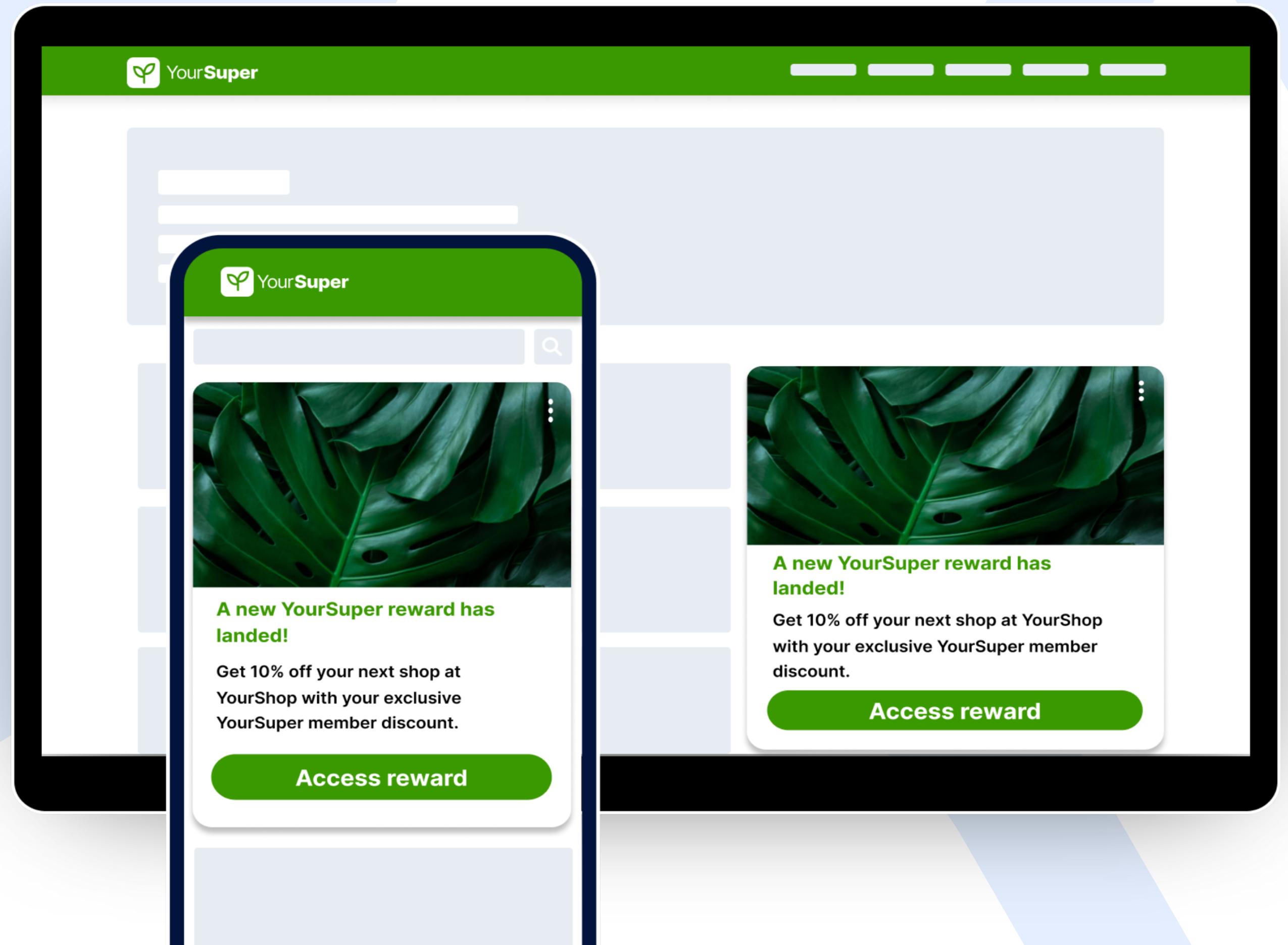


INCREASE CONVERSION

Offers & Promotions

New Rewards

Keep your customer updated and engaged with new member rewards as they become available. Deliver timely updates to bring them back into your app with exclusive new offers and promotions, increasing engagement and loyalty with your customers.





Data Capture

WHY IT MATTERS

“71% of customers say they’re more likely trust a company with personal data if its use is clearly explained”

Source



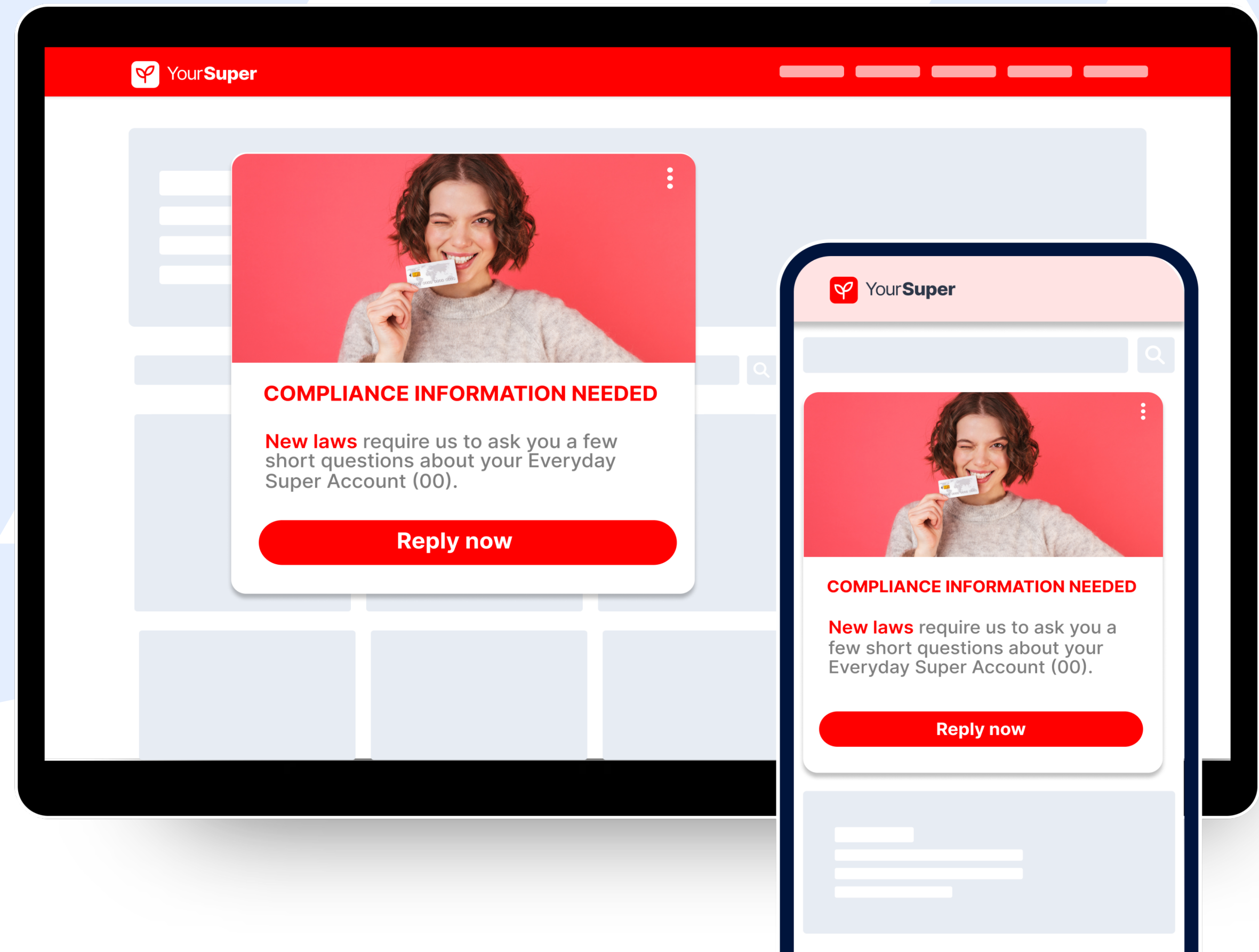
INCREASE CONVERSION

Data Capture

Compliance Checks

Empower your customers with seamless compliance management. Send instant notifications within your app or web portal regarding new laws and regulations. Collect important information you need to adhere to so you can ensure you're being compliant.

Stay ahead with ease, as your business adapts swiftly to evolving legal requirements, all within the convenience of your app.





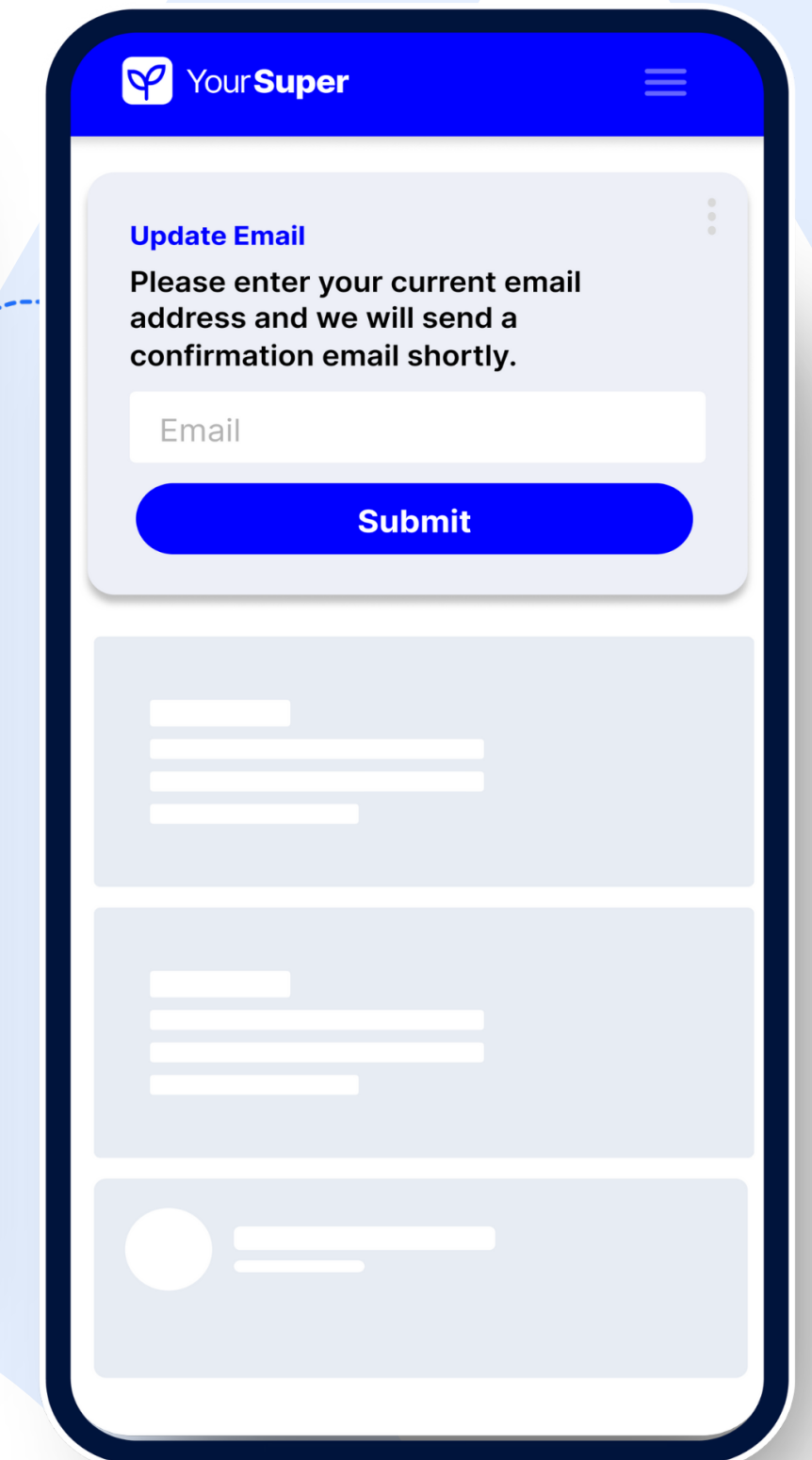
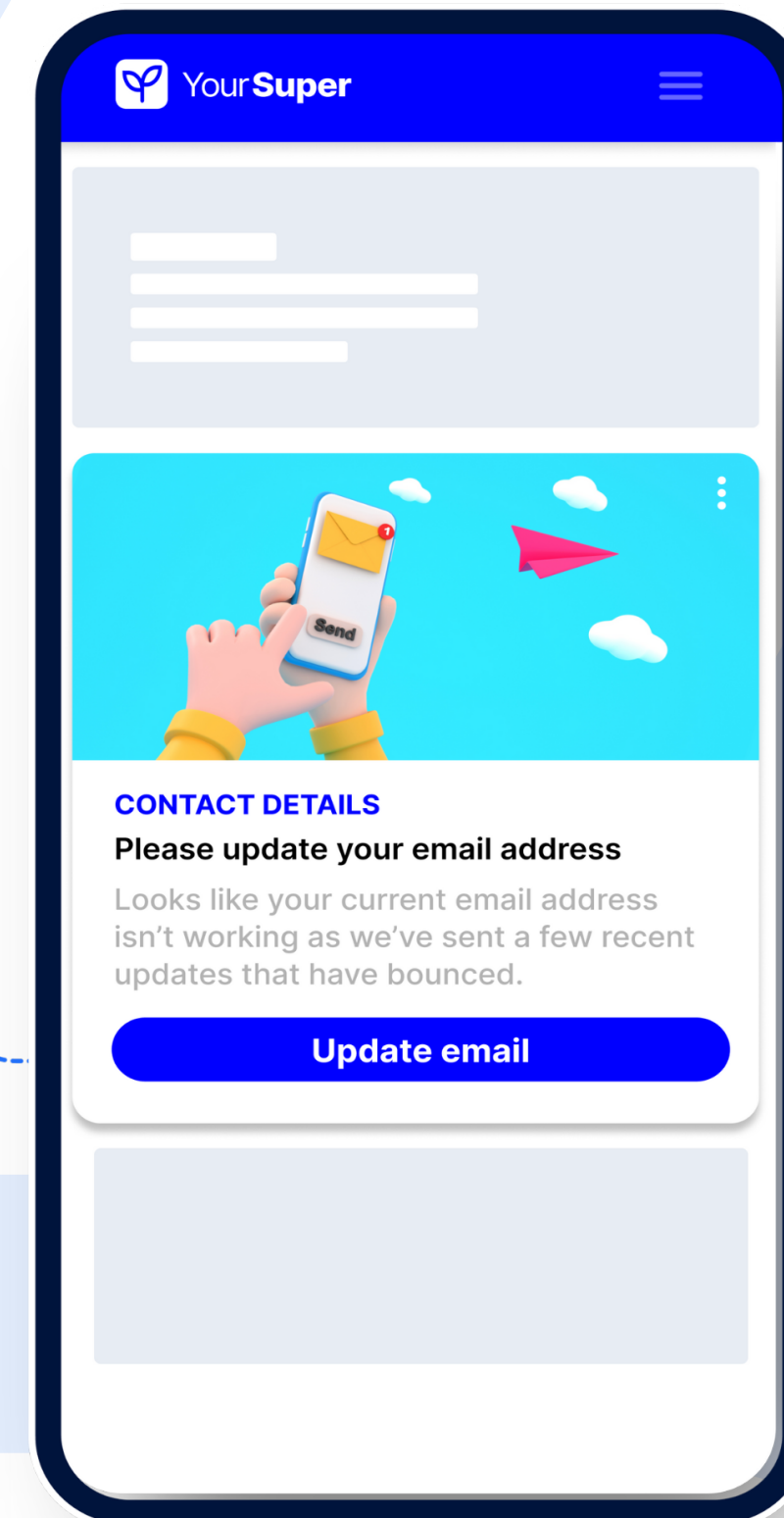
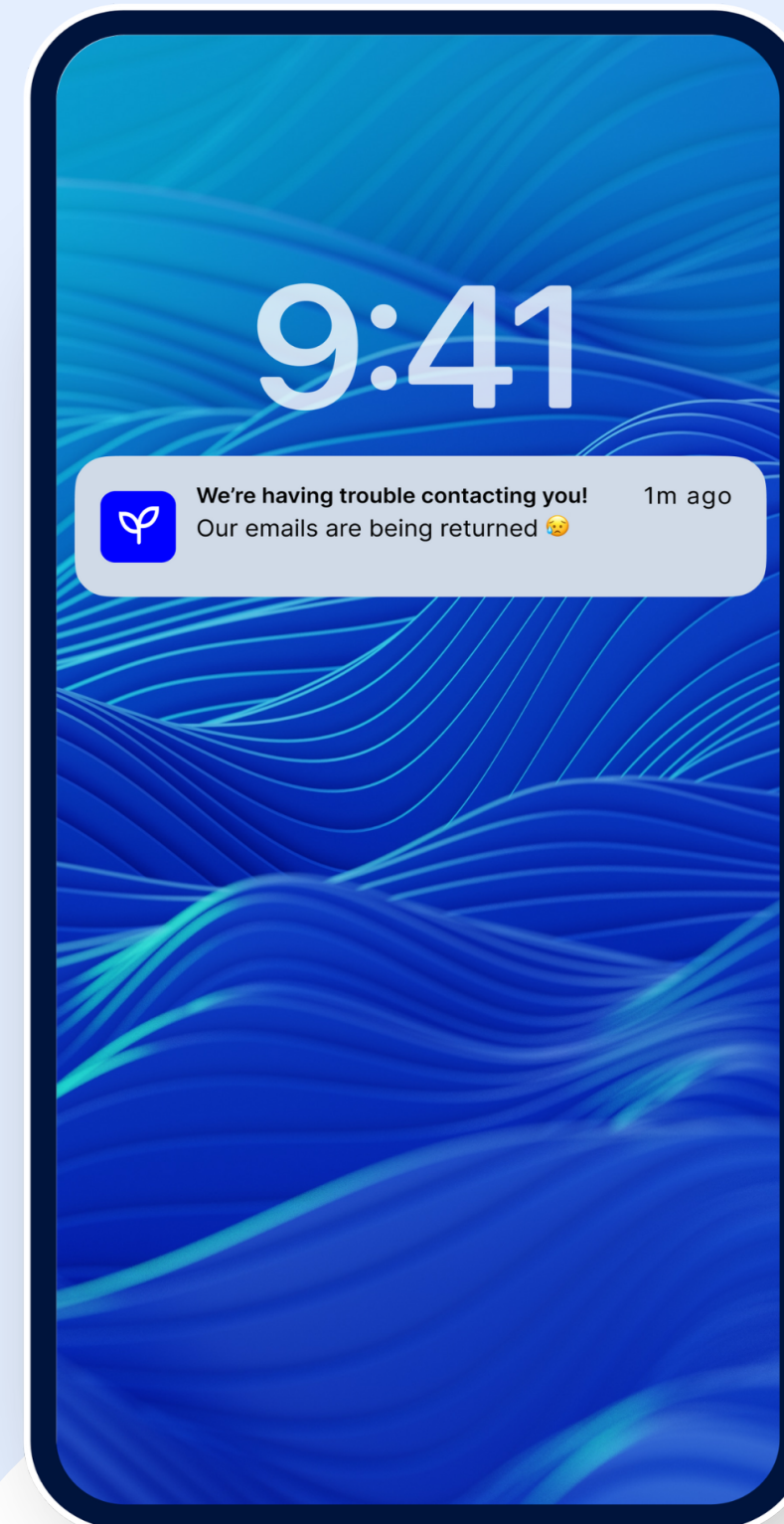
INCREASE CONVERSION

Data Capture

Contact Details Updates

Seamlessly allow customers to update their personal details with just a few clicks, ensuring accuracy and security. From mailing addresses to phone numbers, capture the latest details in seconds.

Reduce reliance on your support team during onboarding while enhancing your overall customer experience.





Alerts & Approvals

WHY IT MATTERS

“76% of consumers have received a malicious text message in the past year”

Source



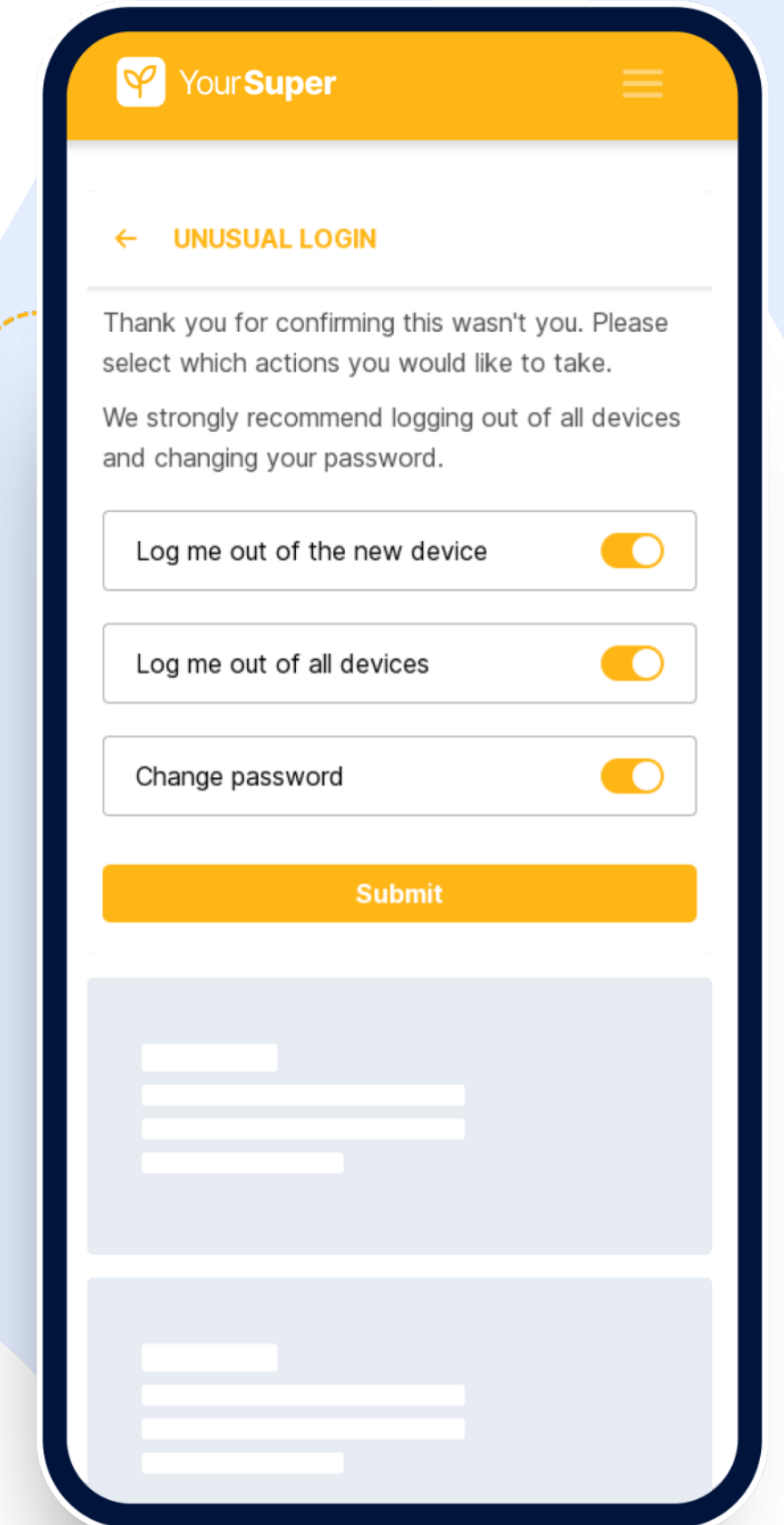
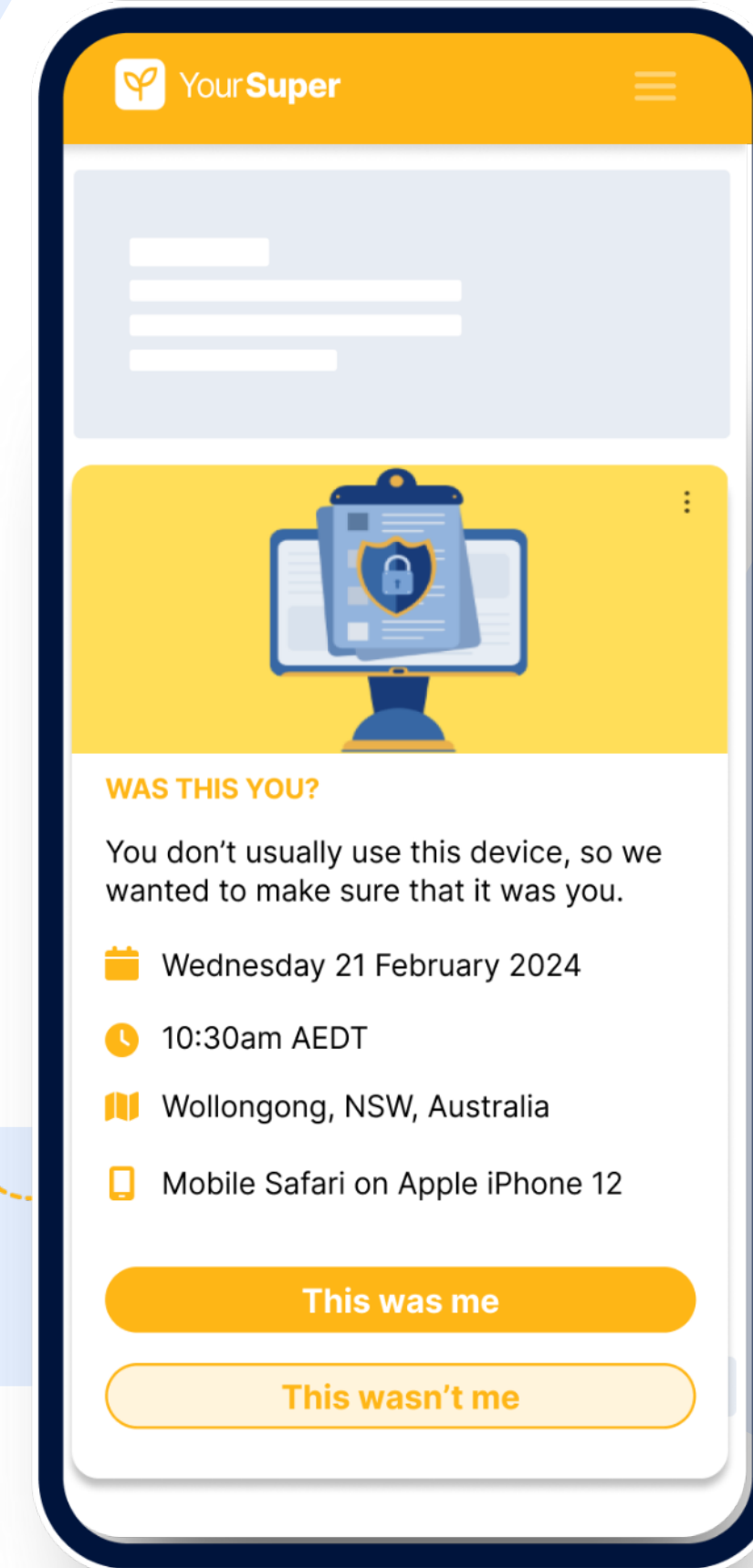
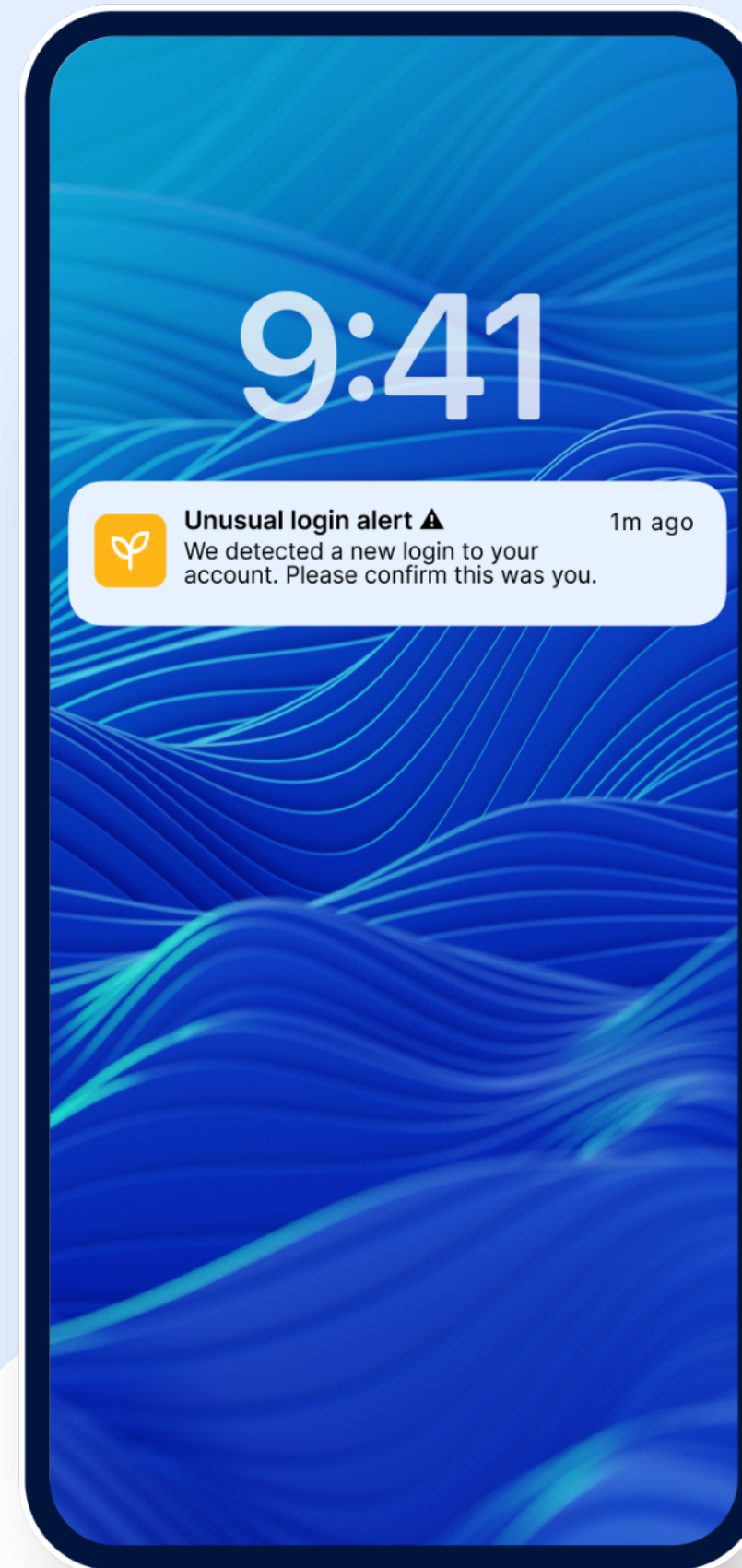
IMPROVE CUSTOMER ACTIVATION

Alerts & Approvals

Unusual Account Login

Suspicious logins can be an extremely sensitive customer experience. By not only notifying a customer the minute an unusual login takes place, but also allowing them the option to take action instantly, you provide a best-in-class experience for customers.

Reduce call centre burdens when unusual logins occur and place the power back in the hands of your customers the minute an event happens.



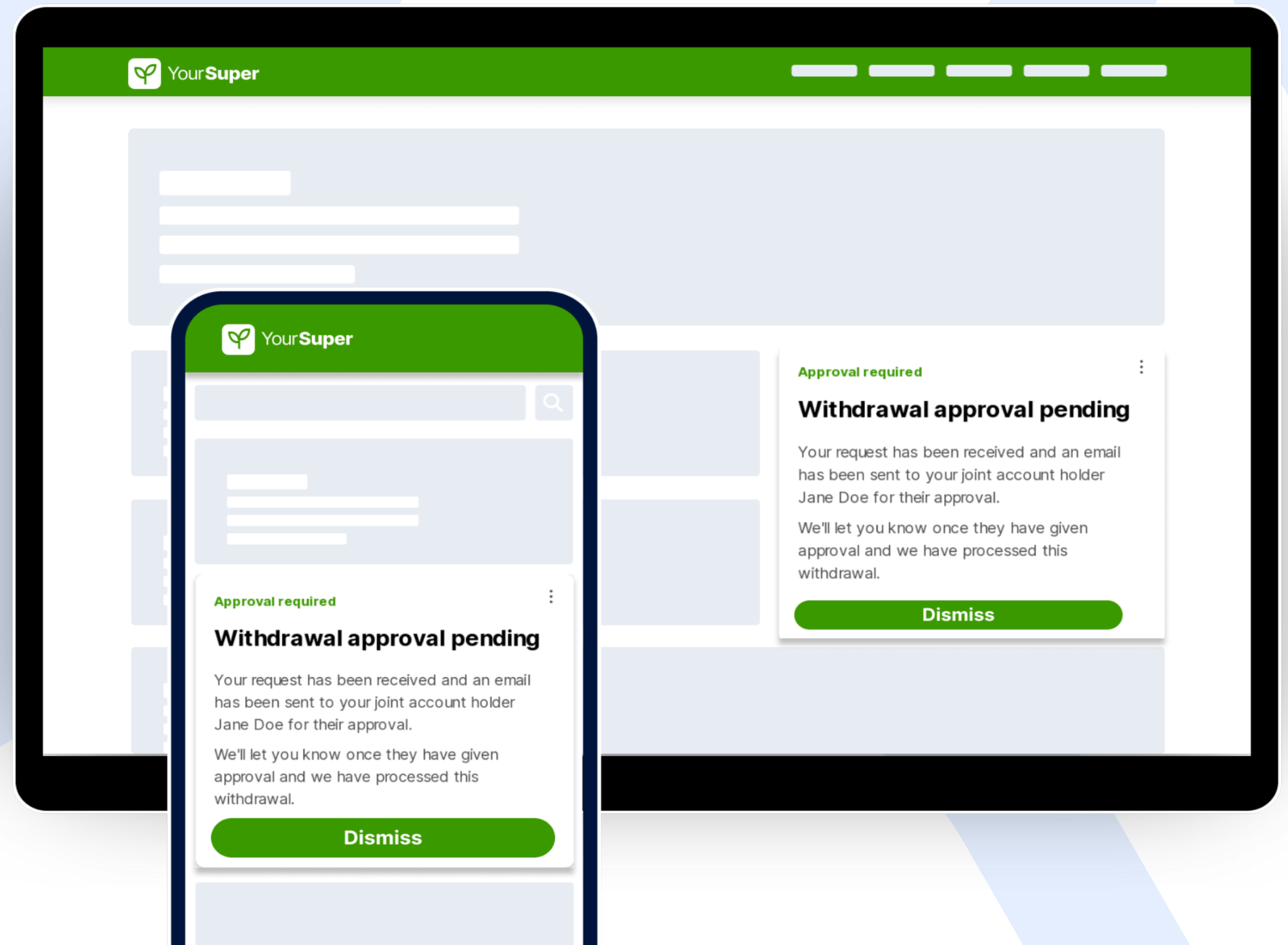


IMPROVE CUSTOMER ACTIVATION

Alerts & Approvals

Transaction Approval

Make transaction approvals seamless by bringing the entire process in-app. Allow your customers to quickly and easily approve or decline transactions with two-factor authentication, increasing their security without having to send them to different apps or platforms.





Onboarding & Activation

WHY IT MATTERS

“88% of customers say the experience a company provides is as important as its products or services”

Source



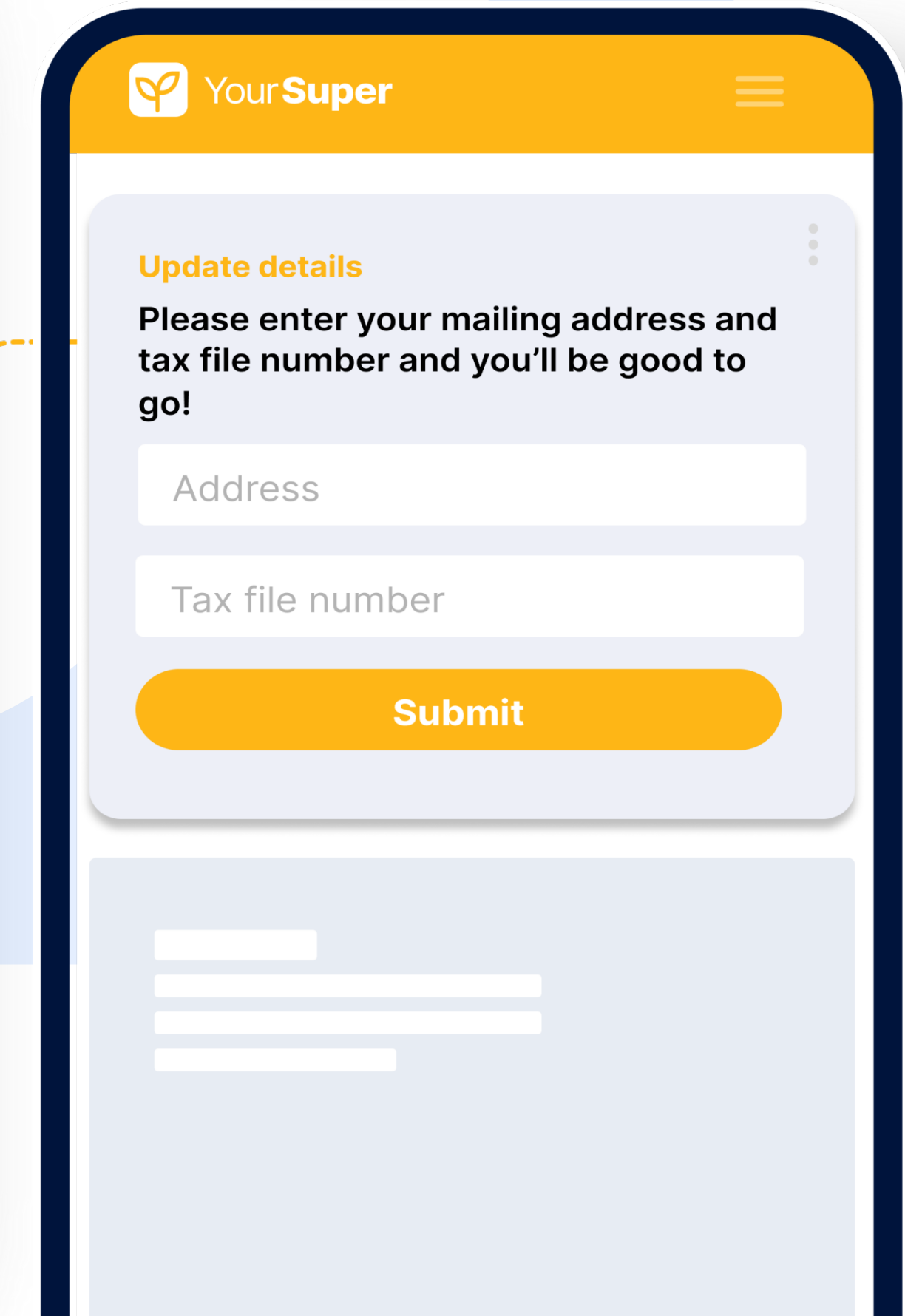
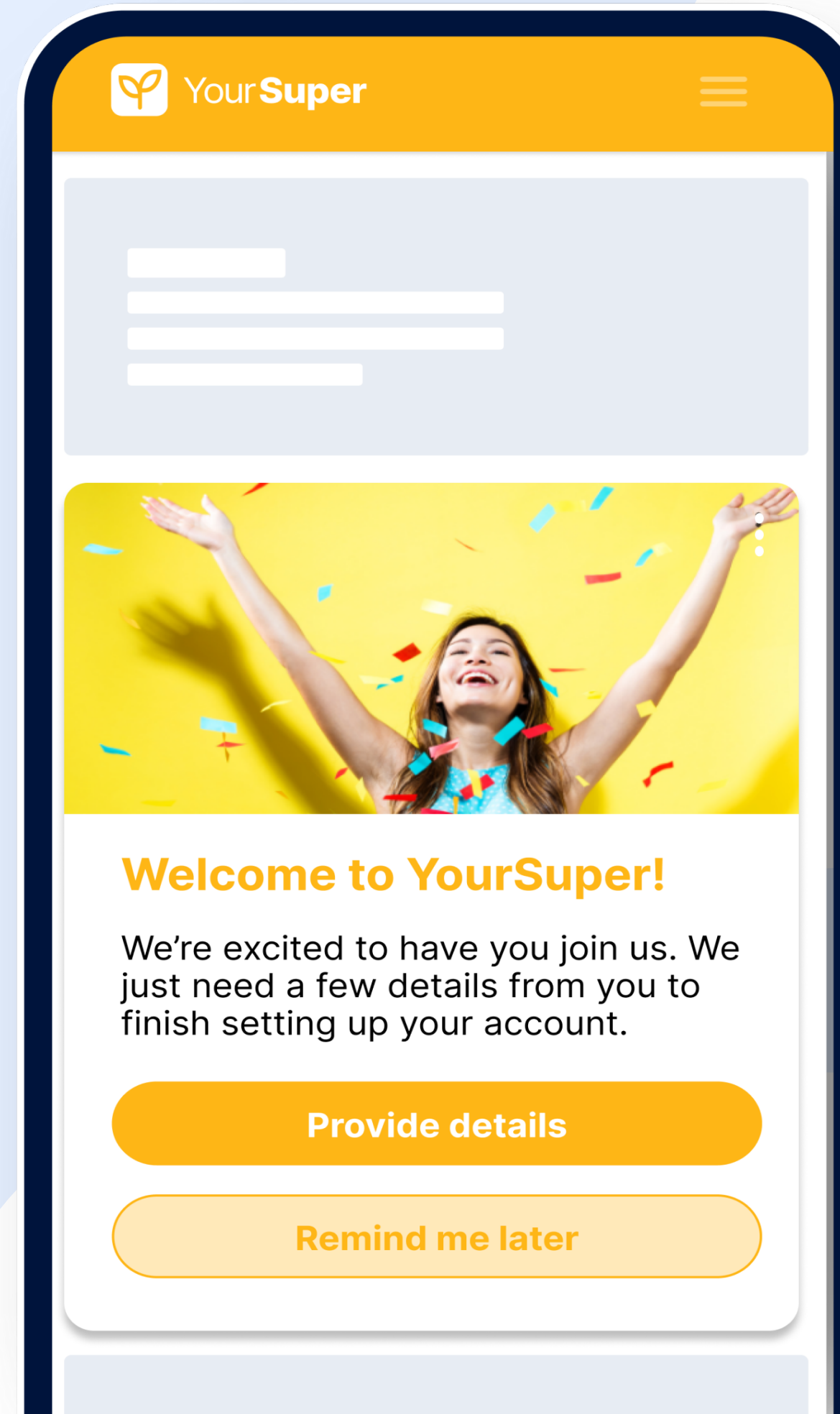
IMPROVE CUSTOMER ACTIVATION

Onboarding & Activation

Account Activation

Say goodbye to the hassle of traditional account set-up processes. We make it easy for your customers to instantly complete their account activation online by creating a simple, actionable onboarding experience.

Enjoy the convenience of reducing reliance on your support team and enhancing your overall customer service experience.





Nudges

WHY IT MATTERS

“73% of customers expect companies to understand their unique needs and expectations”

Source



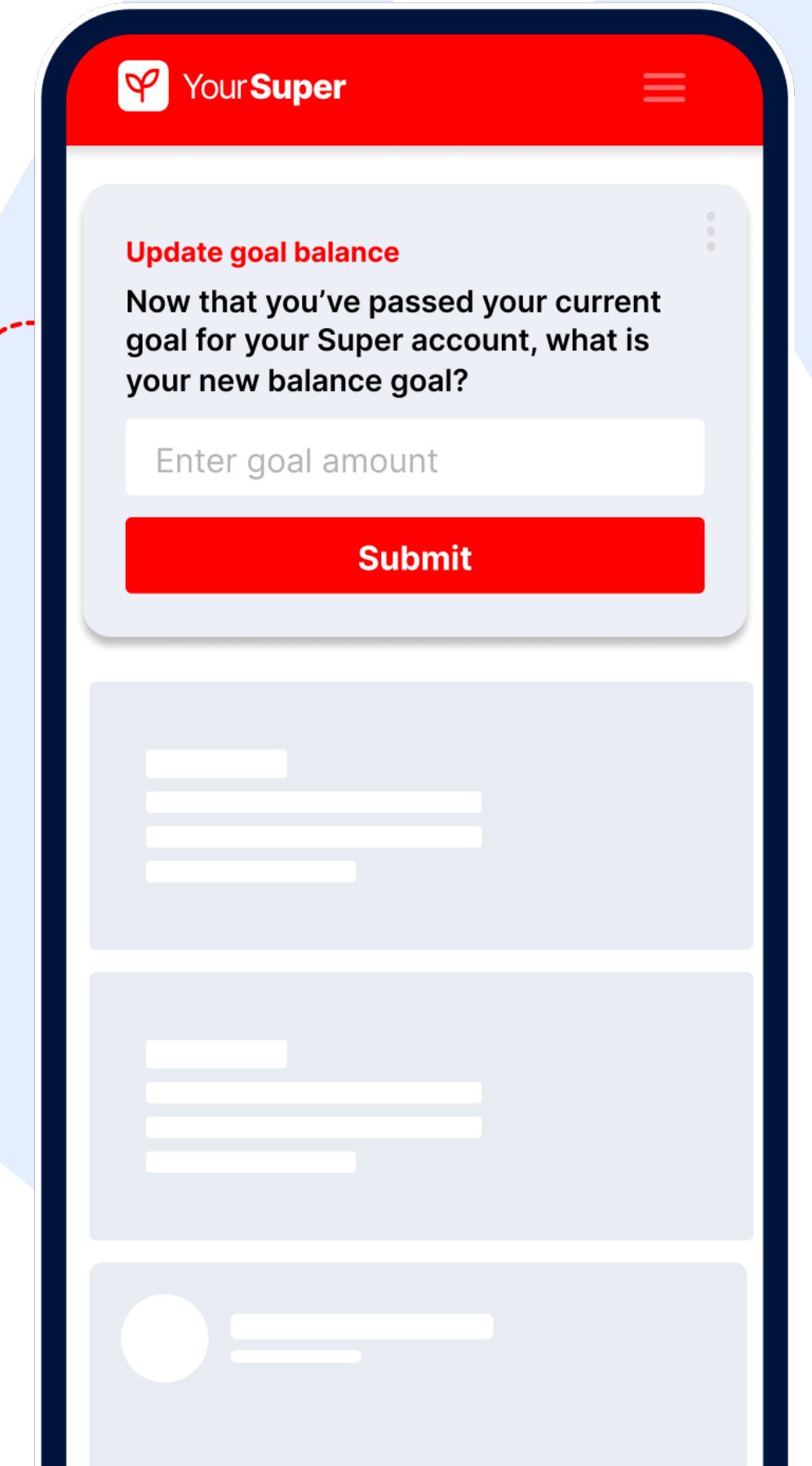
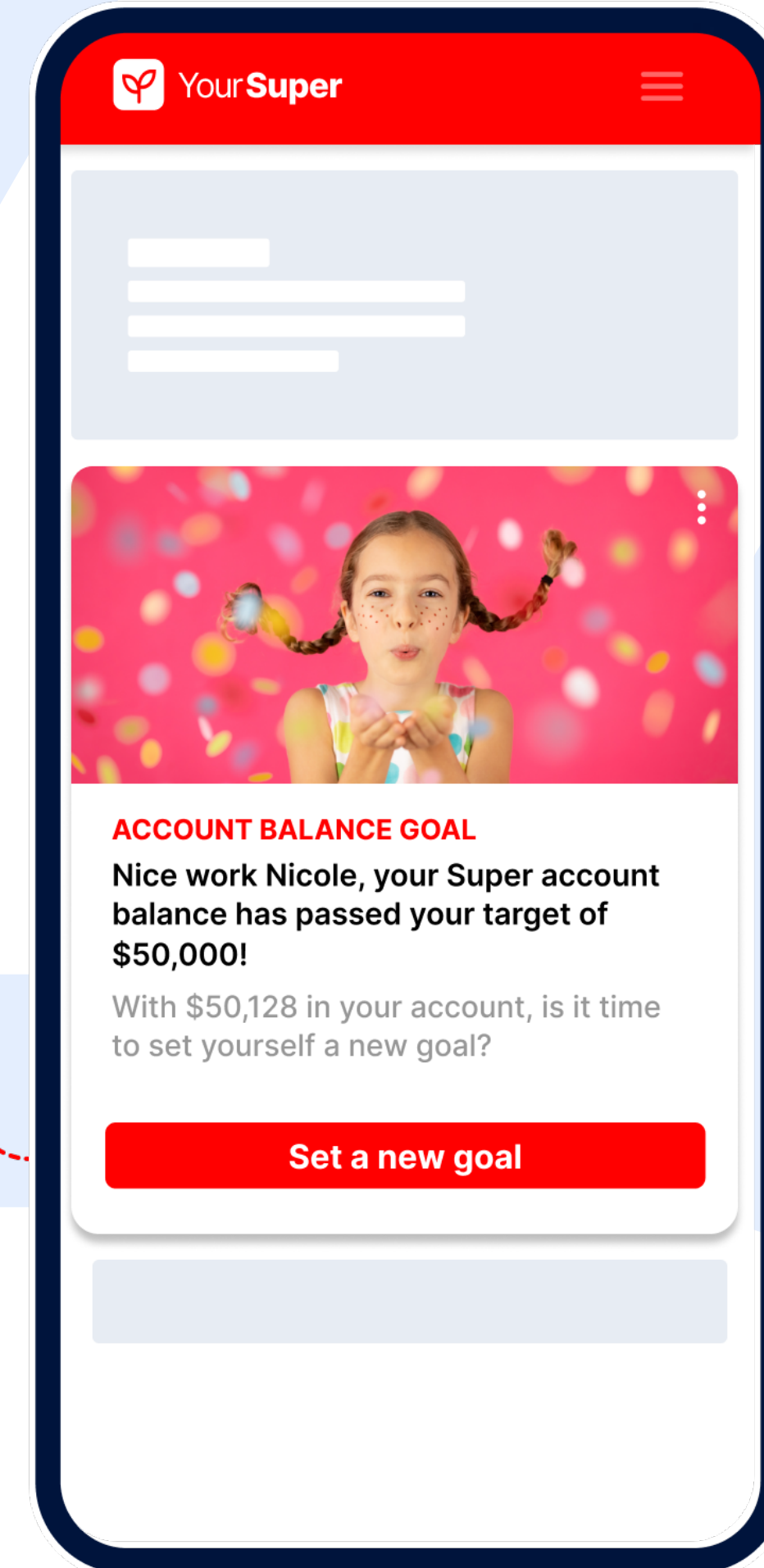
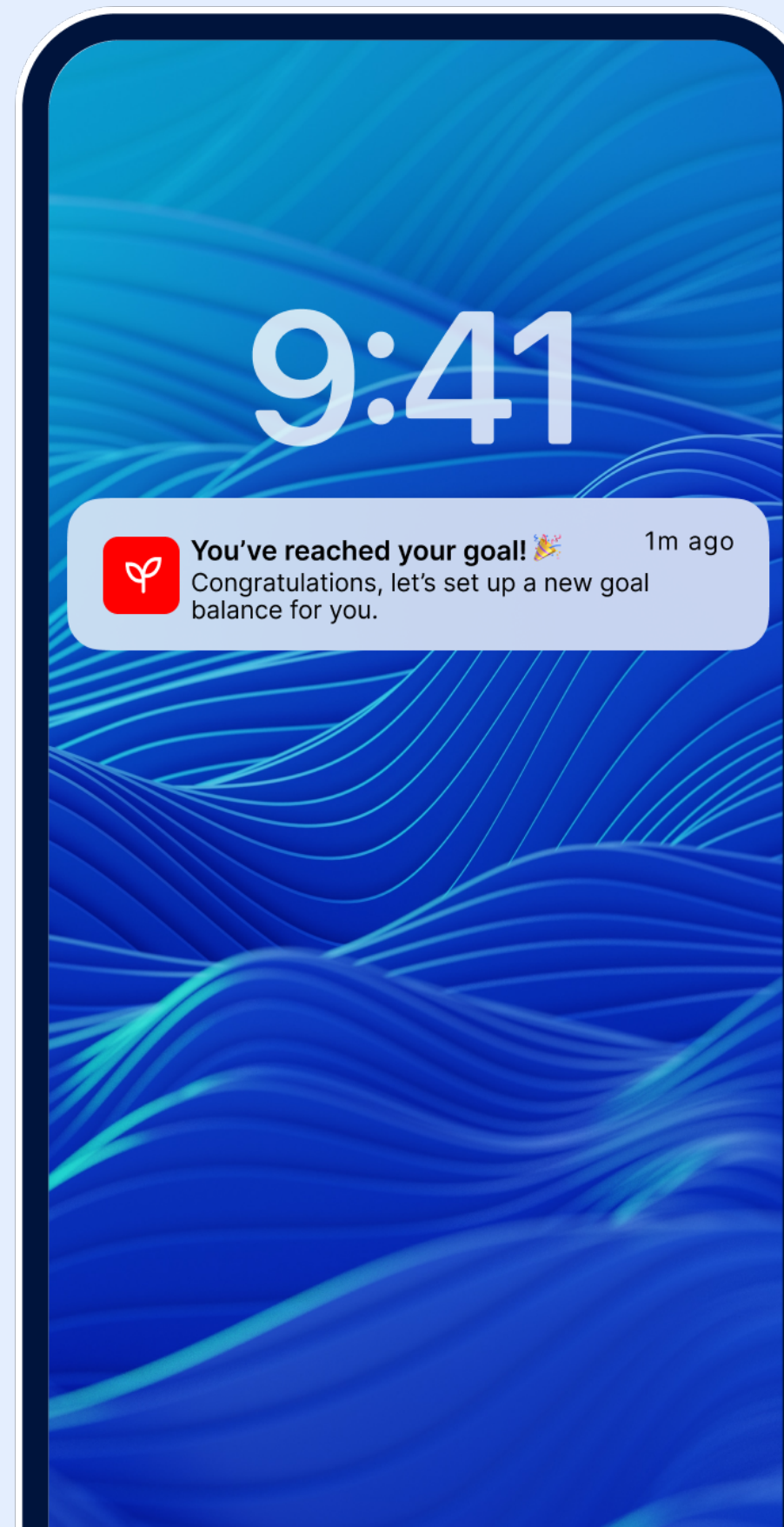
IMPROVE CUSTOMER ACTIVATION

Nudges

Investment Goal

Effortlessly guide users toward their financial objectives through personalised prompts and reminders. Elevate engagement, foster proactive investing, and witness accelerated progress towards financial goals.

Simplify the path to savings success with our intuitive nudges, making every step a triumph.





Insights

WHY IT MATTERS

“76% of consumers think it’s important for brands to demonstrate empathy by showing they can see things from the consumer’s perspective, understand their frustrations and know what’s really important to them.”

Source

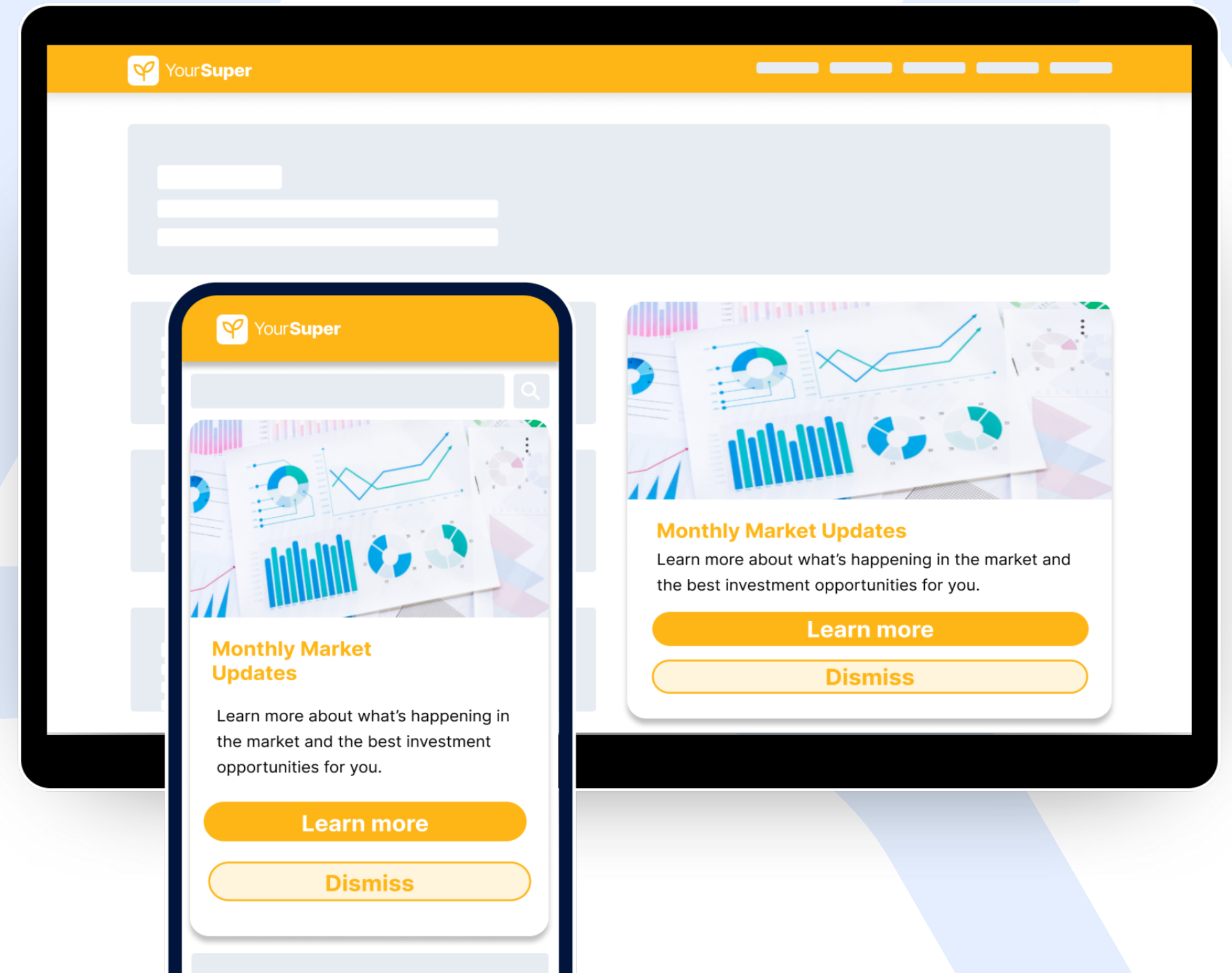


IMPROVE RETENTION

Insights

Market Trends

Share helpful insights and tips to your customers based on market trends to help keep them informed of opportunities in the market. Increase in-app engagement by delivering actionable information they can leverage to reach their goals faster, all without leaving your app.



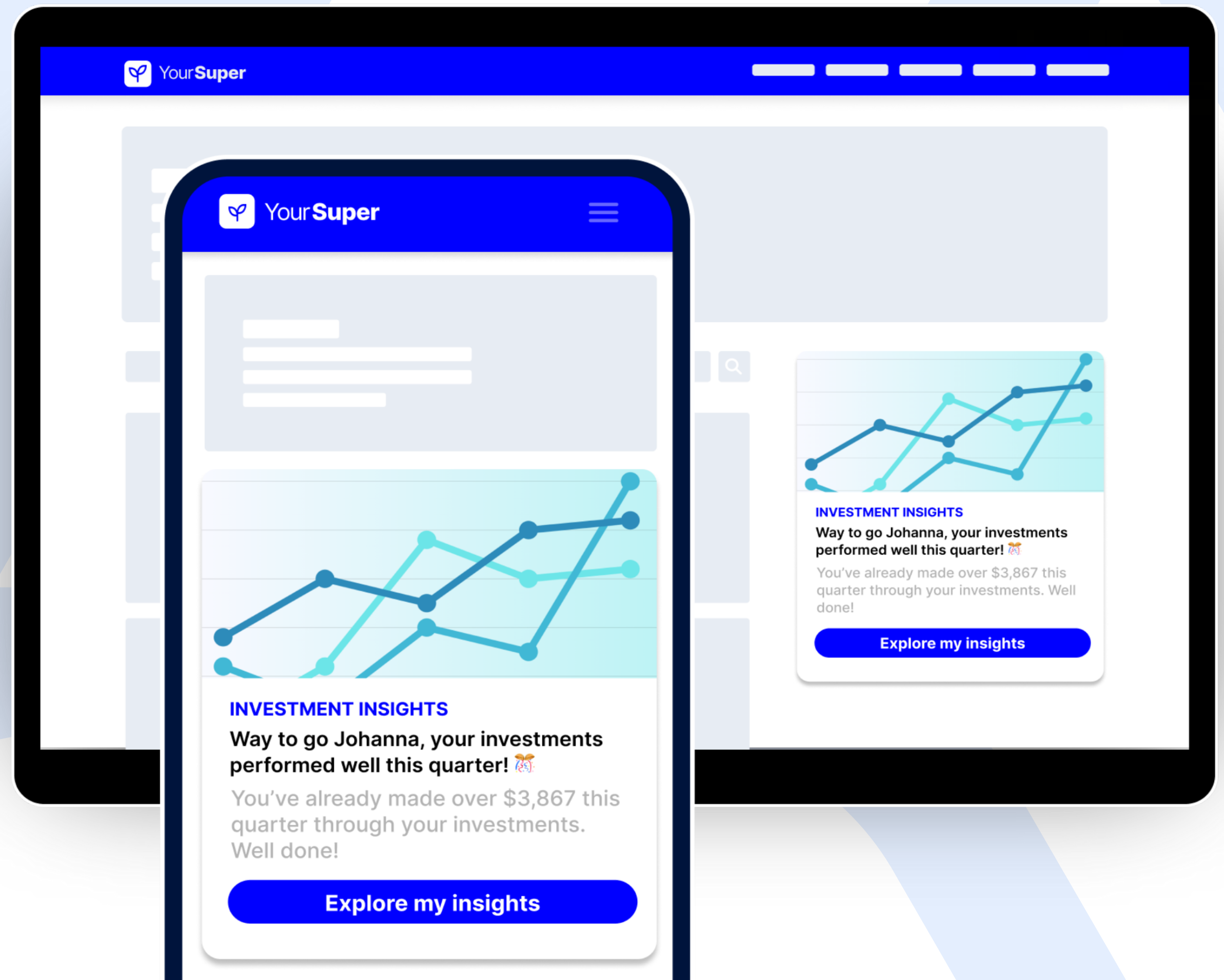


IMPROVE RETENTION

Insights

Account Insights

Provide personalised insights into your customers account and keep them engaged with how their money is performing. Improve in-app engagement and retention by inviting them to become more familiar with their accounts through helpful learnings they can understand (and apply) instantly.





Outreach & Surveys

WHY IT MATTERS

“Businesses underestimate how often customers have poor experiences by an average of 38%”

Source



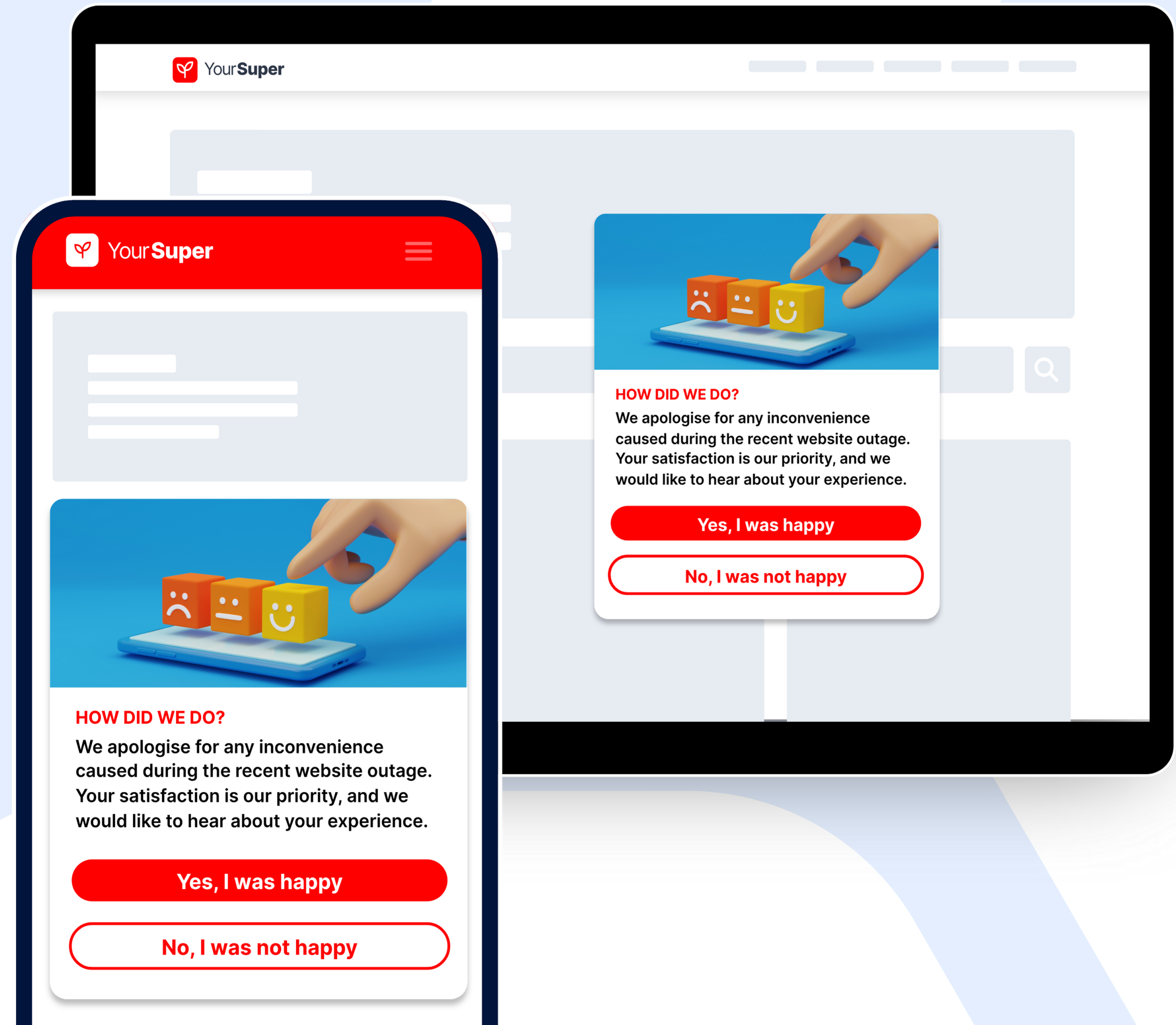
IMPROVE RETENTION

Outreach & Surveys

Feedback

Customer experience matters, and insights shape your organisation's path ahead. Engage with user-friendly surveys to gather opinions and feedback ensuring an enhanced and personalised wealth management journey.

By offering bite-size survey questions and feedback requests, your team will be able to gather more information in a fraction of the time and effort.





Loyalty & Rewards

WHY IT MATTERS

“55% of global consumers say that personalised rewards are why they join loyalty programs”

Source

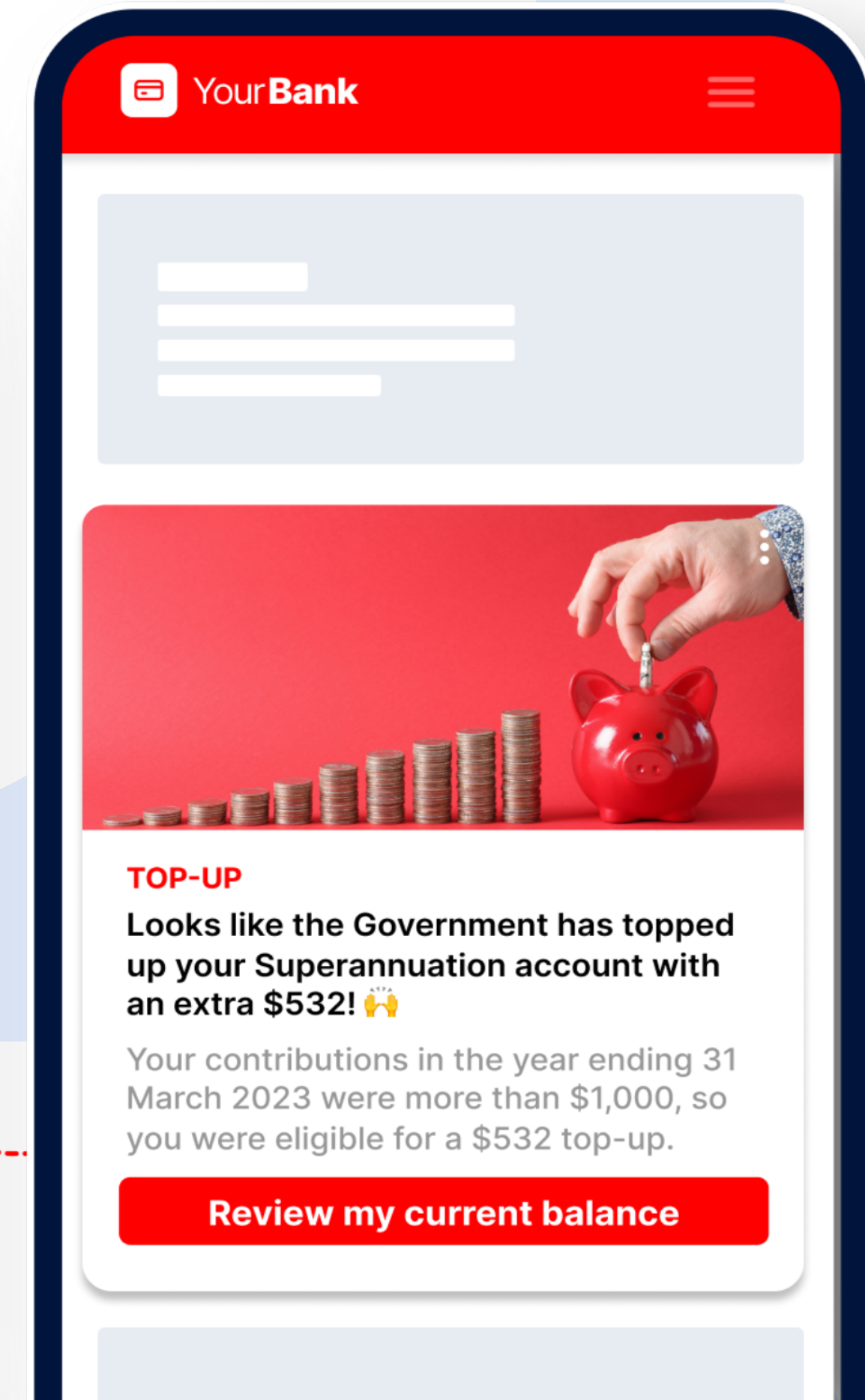
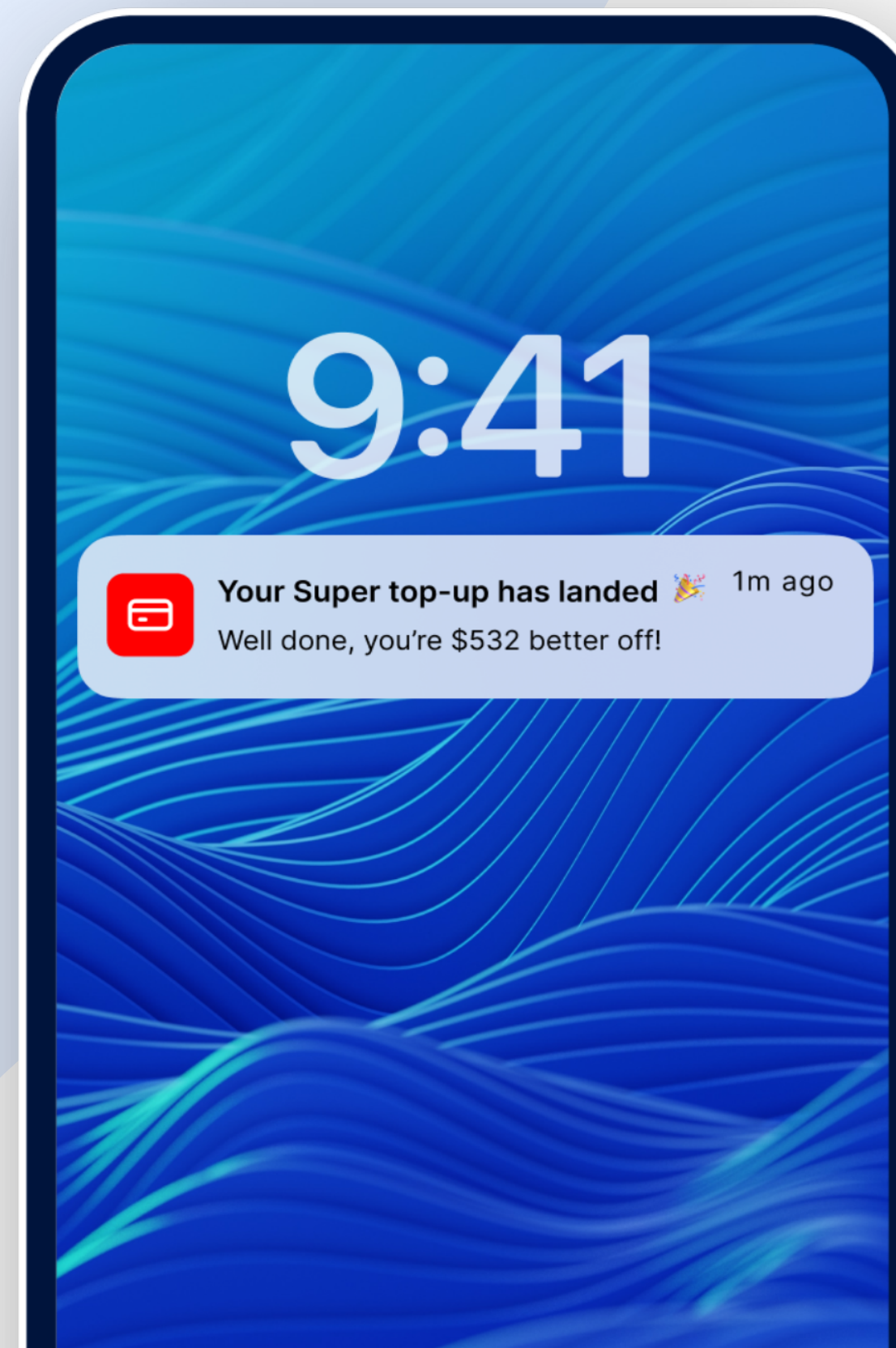


IMPROVE RETENTION

Loyalty & Rewards

Top-Up

Keep your customers engaged and delighted when they receive top-ups to their account. By sending them action cards the minute they receive a deposit, perk or reward, you'll satisfy customers instantly.



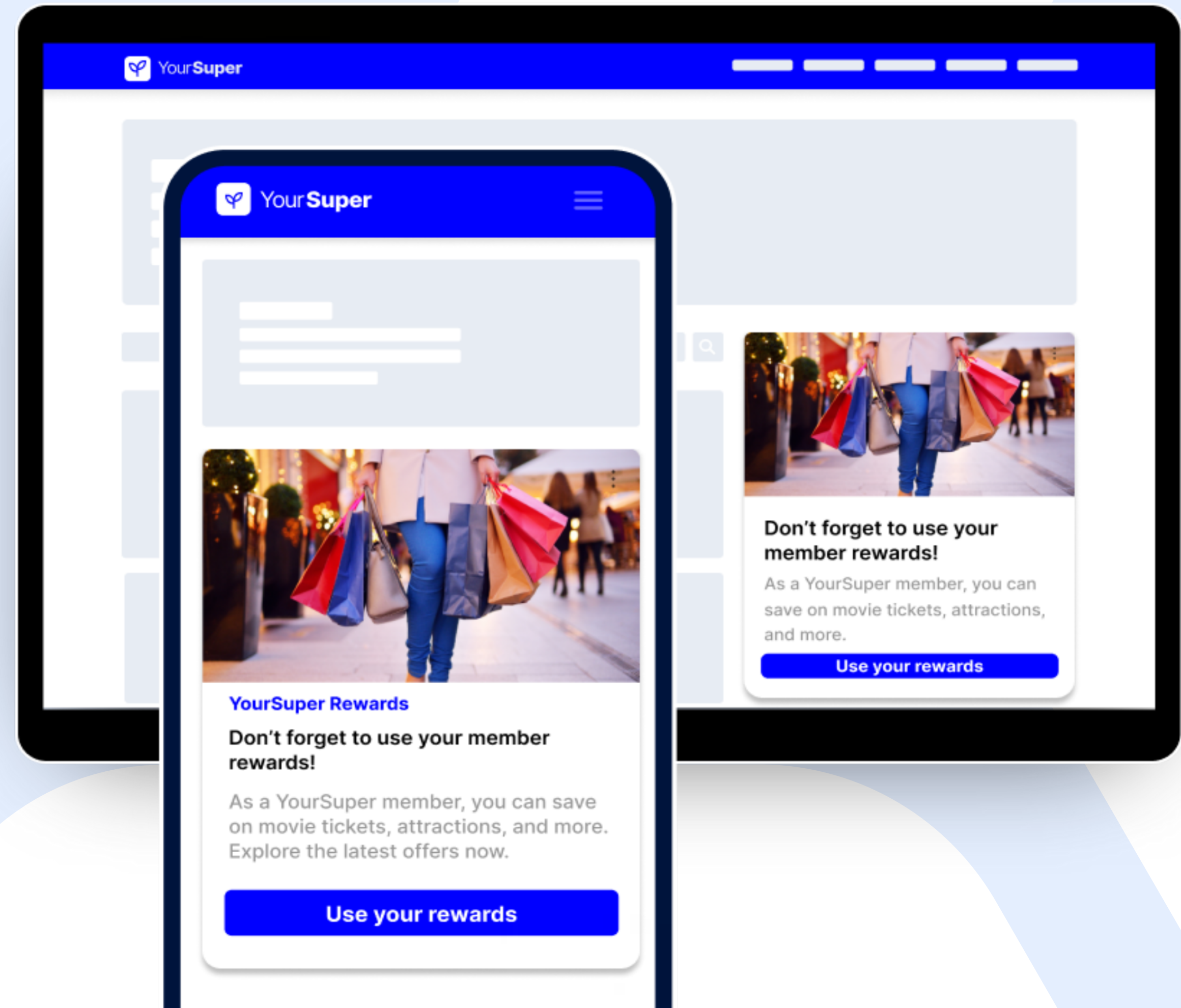


IMPROVE RETENTION

Loyalty & Rewards

Reward Reminders

Bring your customers back into your app with timely reminders to utilise their reward points and engage with your loyalty program. Increase customer retention in your app by keeping your exciting rewards scheme front of mind.





Announcements

WHY IT MATTERS

“72% of consumers are more likely to do business with a company that communicates changes in a timely and transparent manner.”

Source



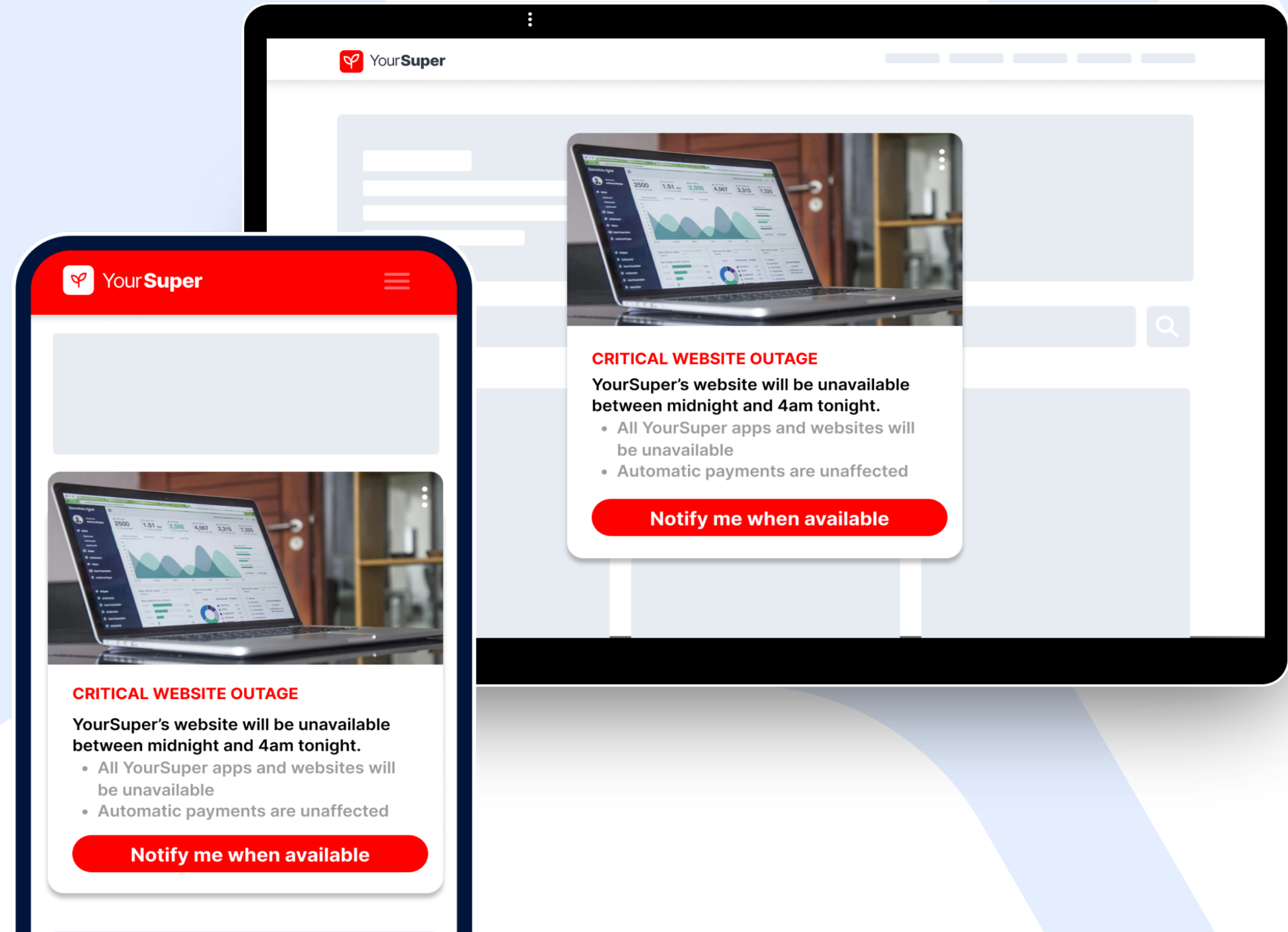
INCREASE CUSTOMER ENGAGEMENT

Announcements

Urgent Outages

Navigate disruptions seamlessly by making sure customers know when there is a planned outage or urgent announcement. Effortlessly allow customers to access alternative solutions, ensuring uninterrupted access to funds.

Make the user's experience a priority, even in the face of unexpected challenges.



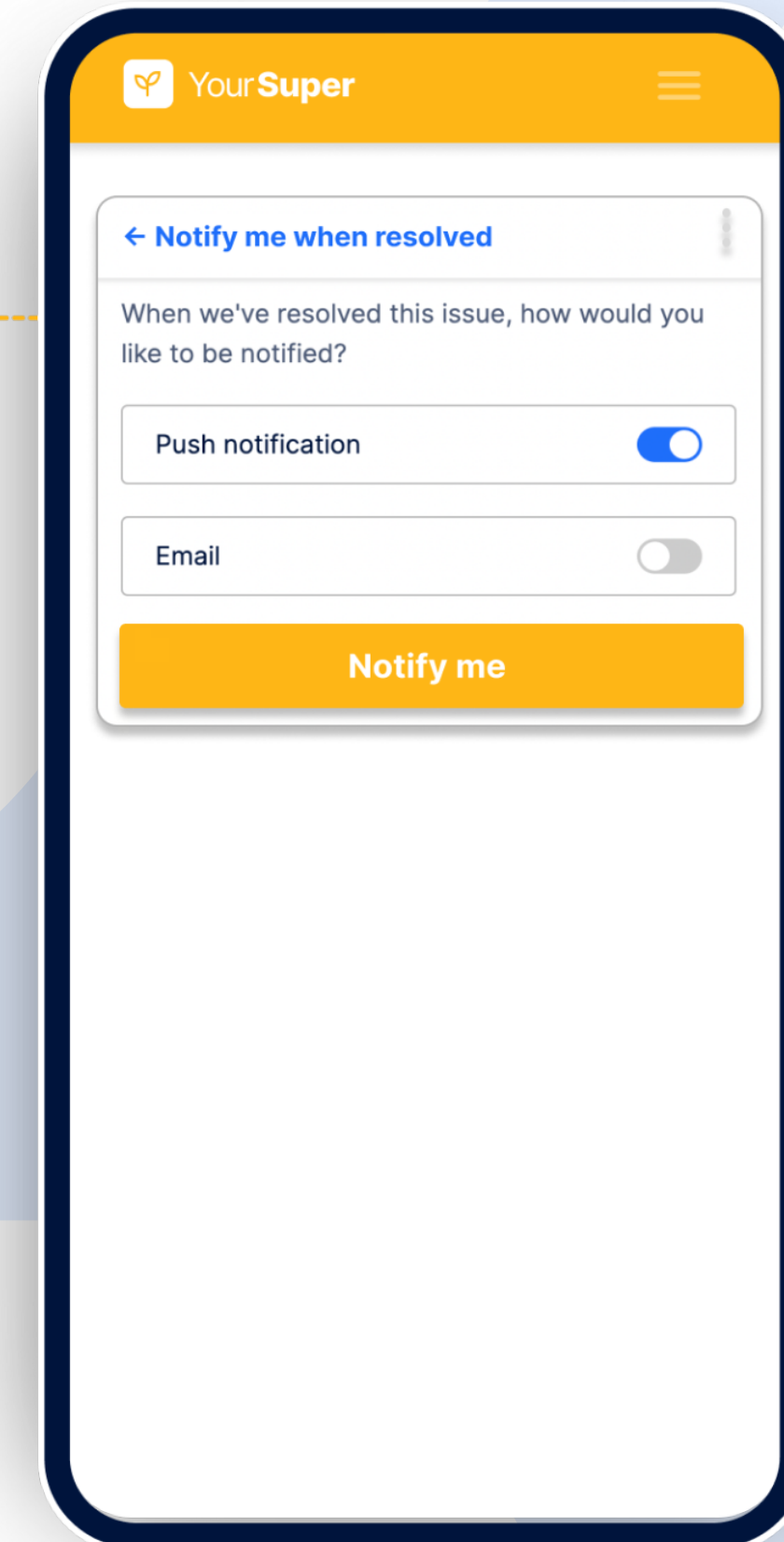
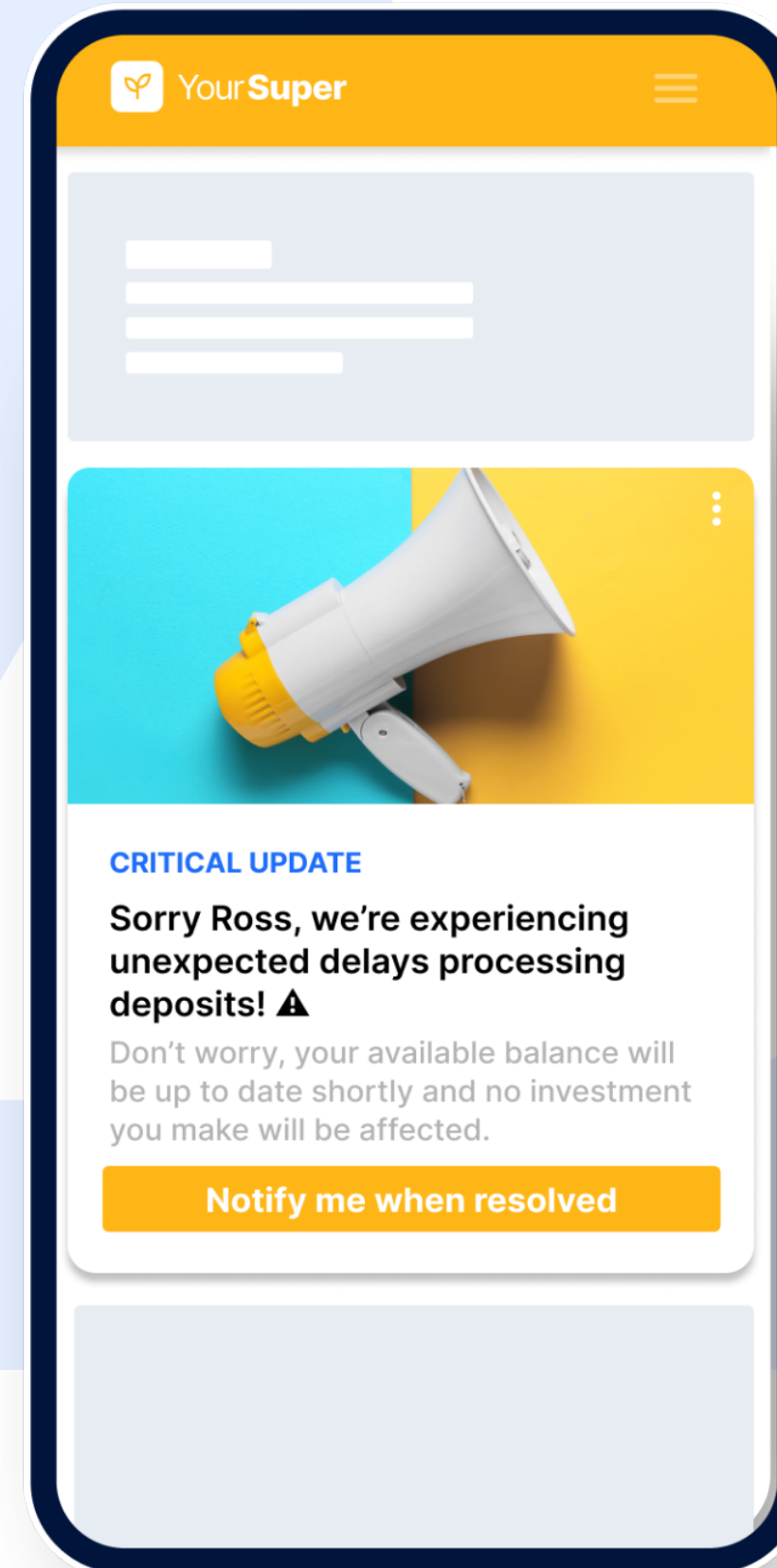


INCREASE CUSTOMER ENGAGEMENT

Announcements

Processing Delays

Delays happen but it's how you handle them that counts with your customers. Keep them informed quickly, while offering them a choice to stay updated - even selecting the channel they prefer.





Personalised Updates

WHY IT MATTERS

“71% of consumers expect companies to deliver personalised interactions”

Source

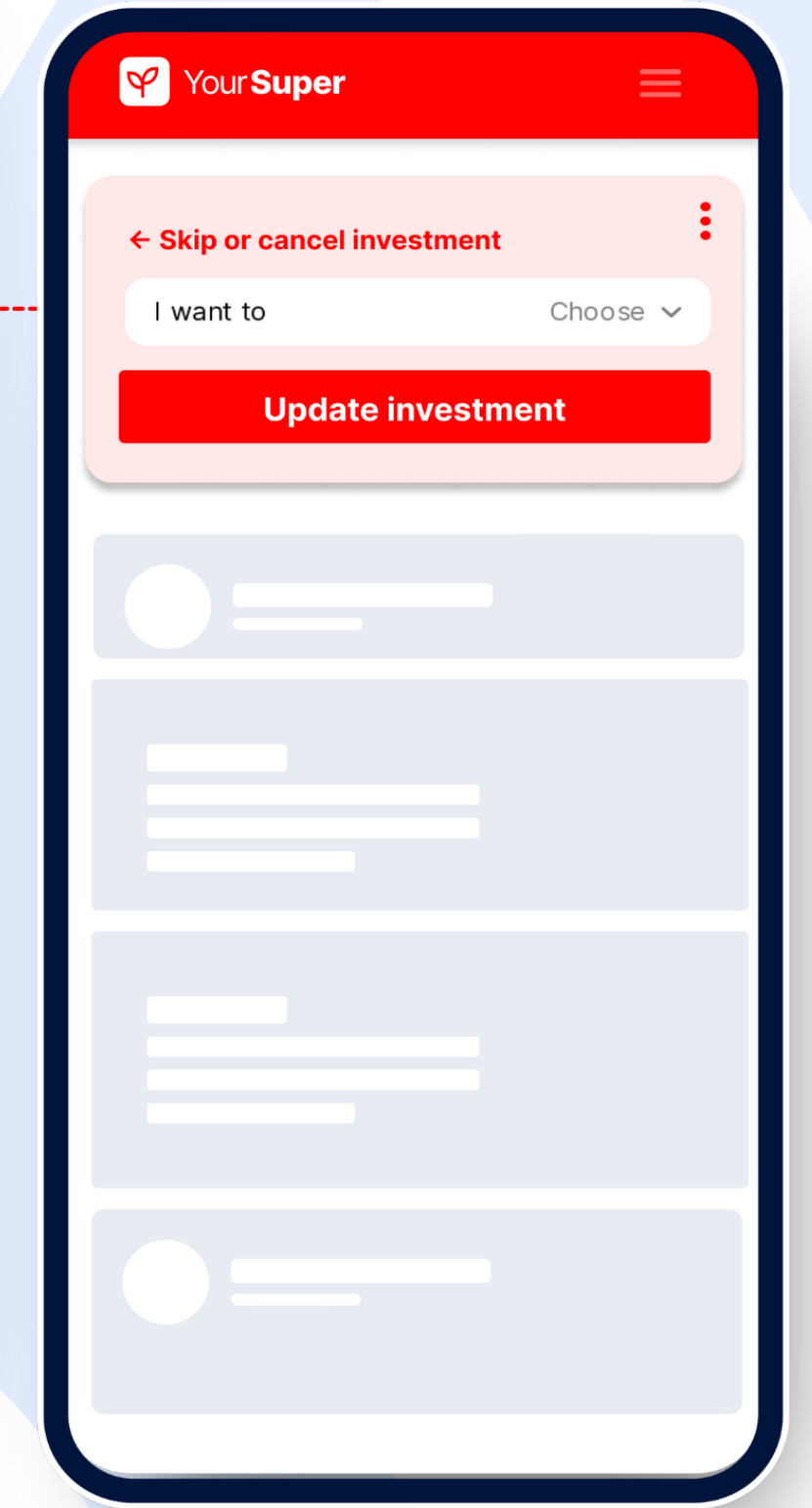
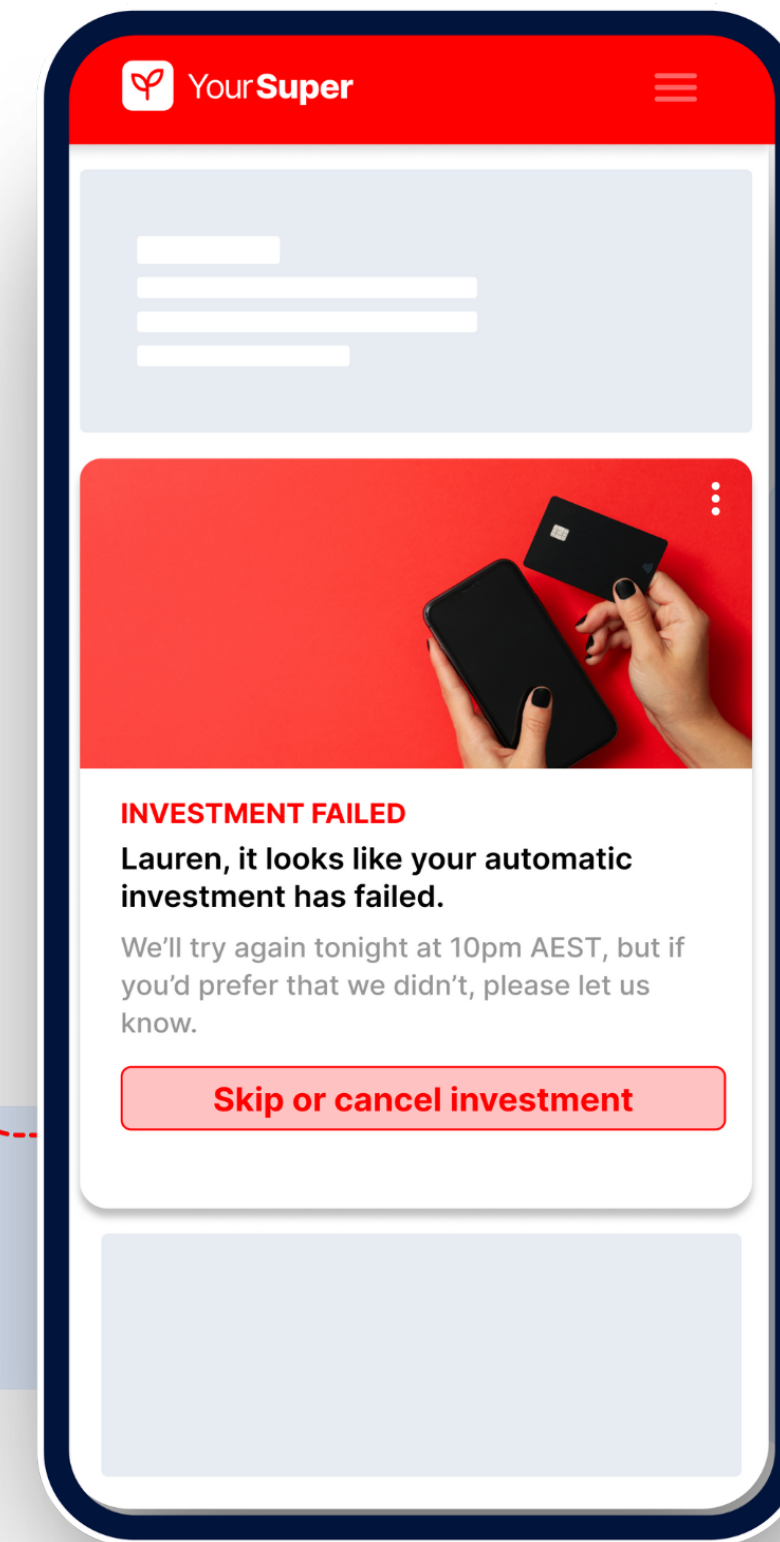
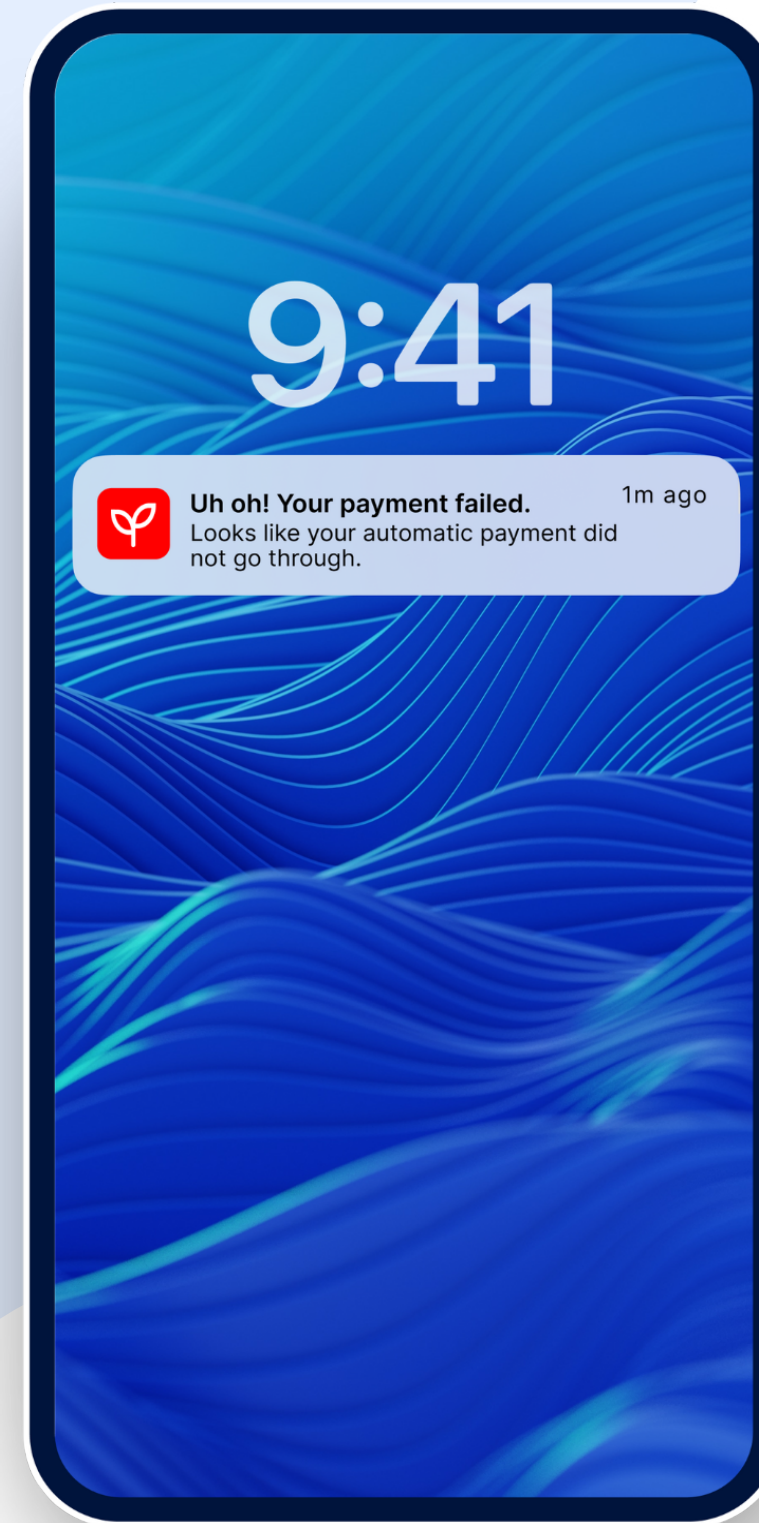


INCREASE CUSTOMER ENGAGEMENT

Personalised Updates

Failed Automatic Investment

Having a scheduled automatic investment failure can be a frustrating experience for a customer, therefore it's crucial that they receive a highly visible and actionable message updating them on the situation. This will inform them of this failure to process the transaction and provide them with a swift path to resolution in the least number of steps so that they can get back to what they were doing.



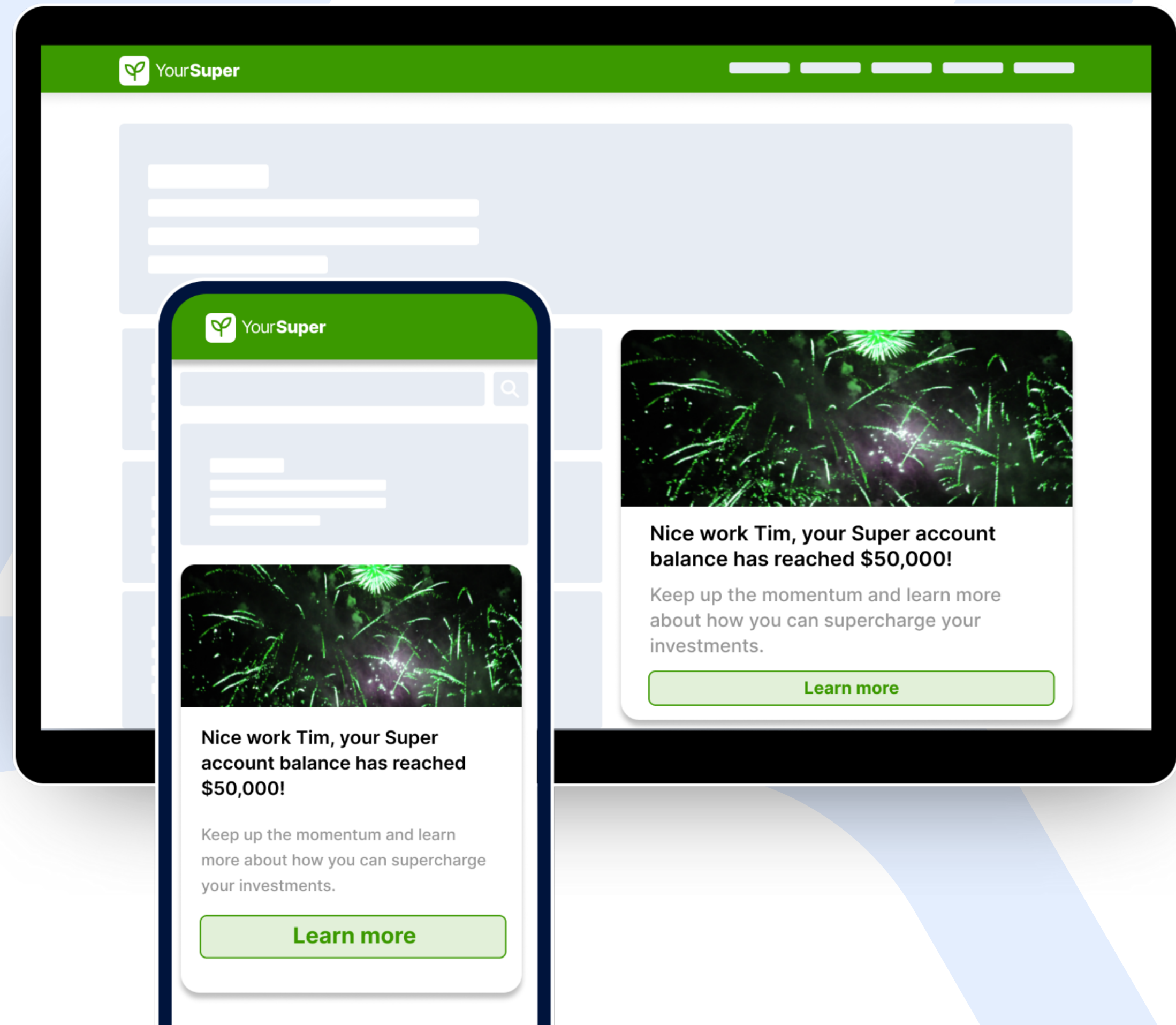


INCREASE CUSTOMER ENGAGEMENT

Personalised Updates

Balance Update

Share exciting news with your customers, keeping them updated with news about their growing balance. Let them take advantage of the great news and increase engagement by providing actionable steps for how they can continue their progress right inside your app.



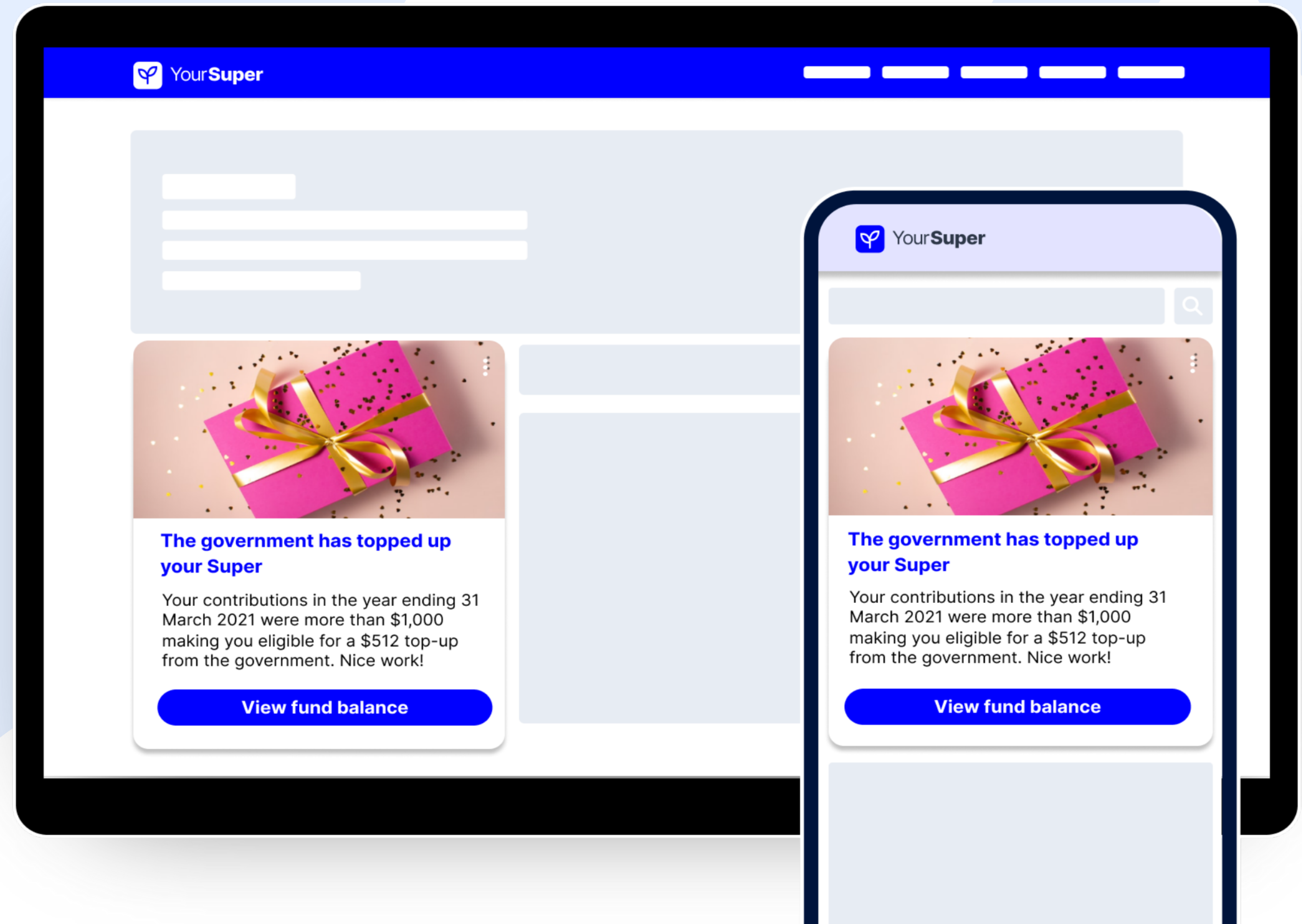


INCREASE CUSTOMER ENGAGEMENT

Personalised Updates

KiwiSaver Deposit

Let customers know when KiwiSaver deposits come through with real-time updates. Create personalised journeys to let them understand next steps and explore possibilities within your app, increasing engagement and retention.





Education

WHY IT MATTERS

“90% of companies have seen a positive return on their customer education investments”

Source

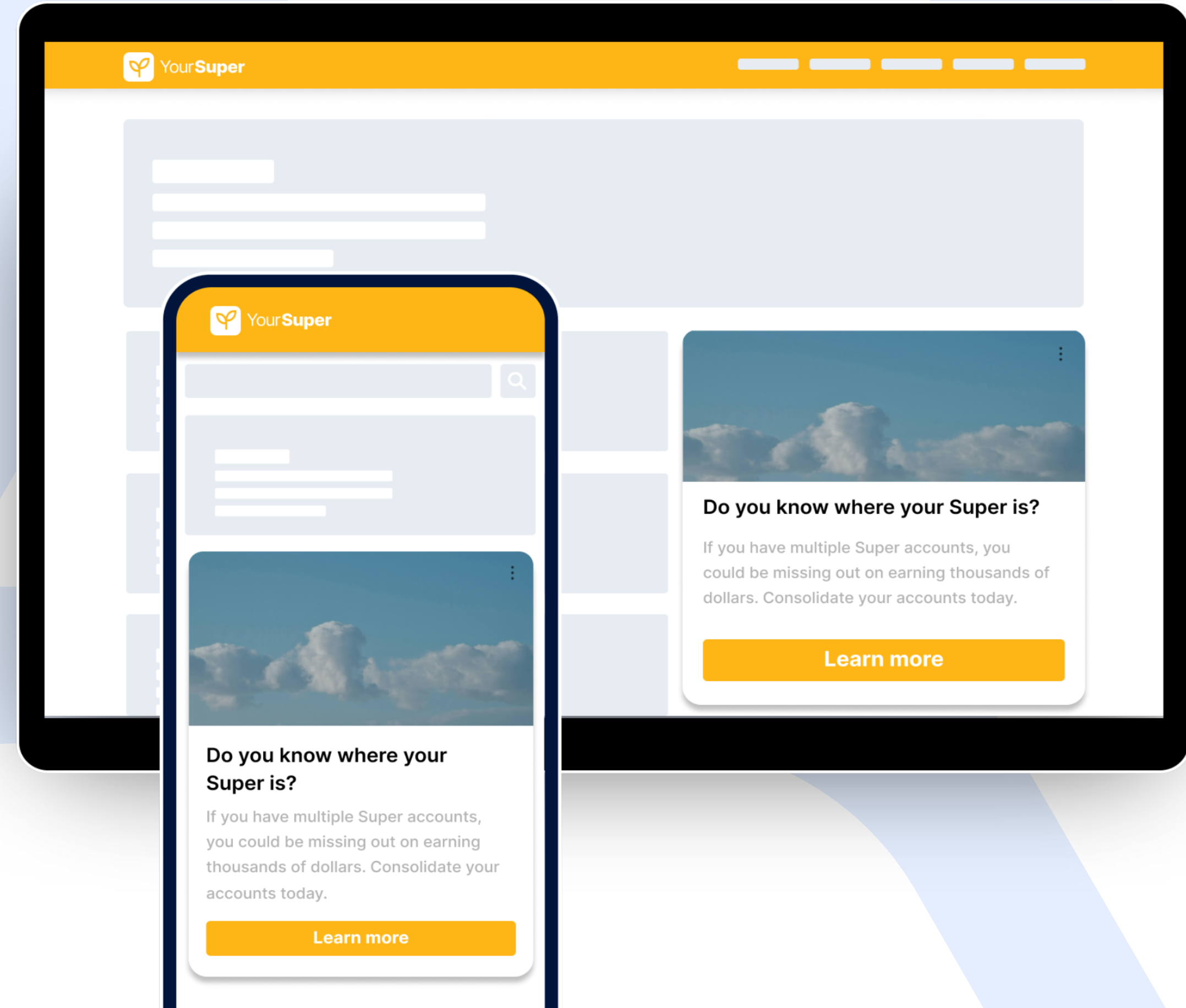


INCREASE CUSTOMER ENGAGEMENT

Education

Combine Accounts

Help customers to navigate the often tedious process of finding and combining superannuation accounts. Create an actionable customer journey walking them through the process and simplify the task, letting them cross off an item on their to do list with minimal fuss.





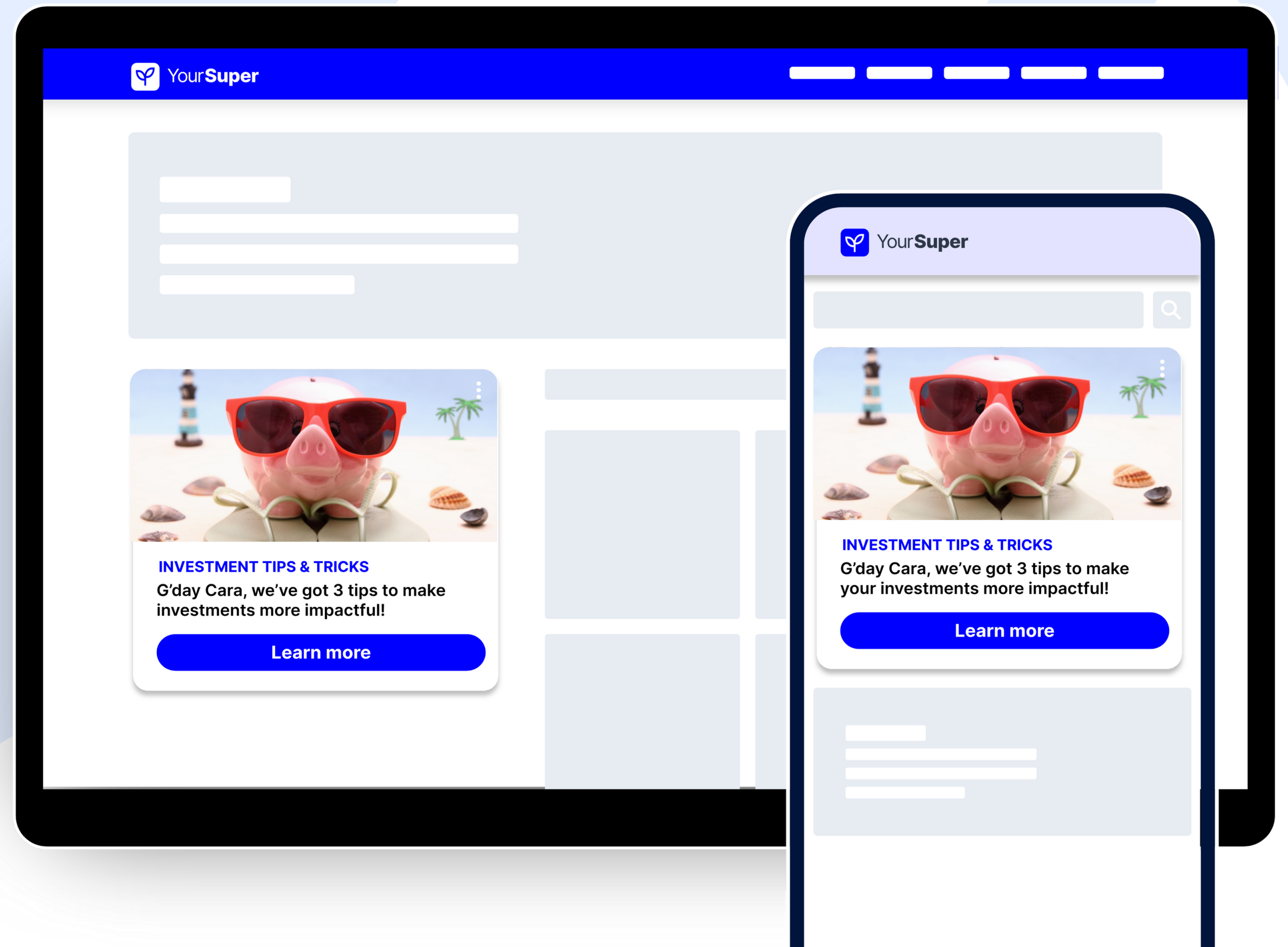
INCREASE CUSTOMER ENGAGEMENT

Education

Investment Tips

Allow users to access expert advice, tips and tricks to optimise their superannuation journey. Enable them to integrate these tips into their financial routine, gaining the knowledge to make informed decisions to achieve their financial goals.

Create a series of informative action cards that can be sent via an action flow, or embed your latest insight video series.





INCREASE CUSTOMER ENGAGEMENT

Education

Education Series

Demystify wealth management for your customers by delivering bite-sized pieces of information educating them on how they can make the most of their superannuation.

Connect with people new to the world of superannuation and help make their journey an easier one.

