Solutions Catalogue Wealth Management

2024



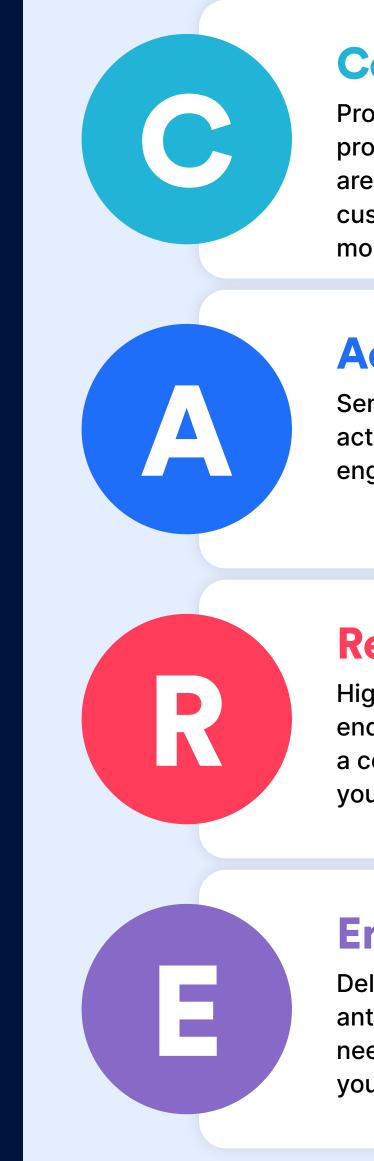




Introduction

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.

► <u>Self-Service</u>

- Offers & Promotions
- Data Capture

Activate

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

- Alerts & Approvals
- Onboarding & Activation
- Nudges

Retain

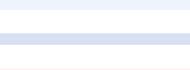
Highlight customer insights, enquiries, and rewards that create a compelling path to action within your app.

- 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.

work well.

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









INVESTMENT GOAL

Nice work Nicole, your Super account balance has passed your target of \$50,000!

With \$50,128 in your account, is it time to set yourself a new goal?

Set a new goal



Self-Service

MATTERS

"57% of customers prefer to engage through digital channels"









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.







APPOINTMENT SCHEDULING

Congratulations on your new account, **Duncan! Lets get those documents** finalised.

We have a number of available time slots to arrange your visit and finish getting you sorted.

Select date and time

Arrange call to discuss

Your Super

Arrange a call

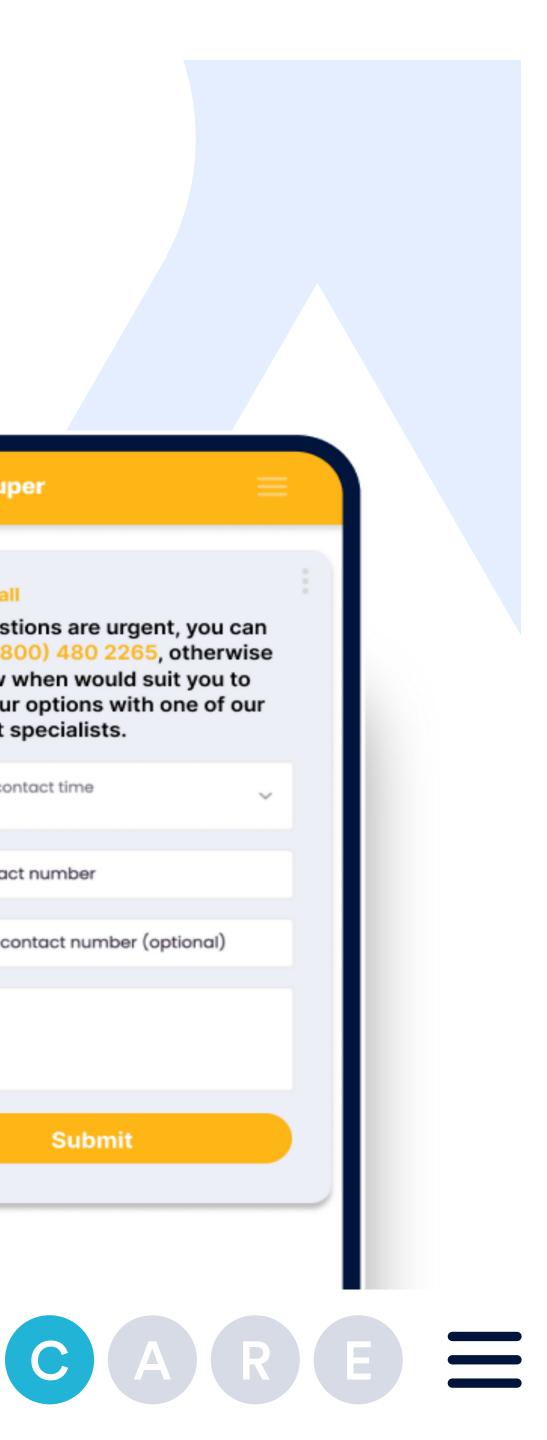
If your questions are urgent, you can call us on (800) 480 2265, otherwise let us know when would suit you to discuss your options with one of our investment specialists.

Preferred contact time Choose

Best contact number

Alternate contact number (optional)

Submit





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.





OPTIMISE YOUR INVESTMENT

Did you know that making additional super contributions could supercharge your funds AND save on tax?

Find out more

Talk to our experts

OPTIMISE YOUR INVESTMENT

Did you know that making additional super contributions could supercharge your funds AND save on tax?

Find out more	
Talk to our experts	







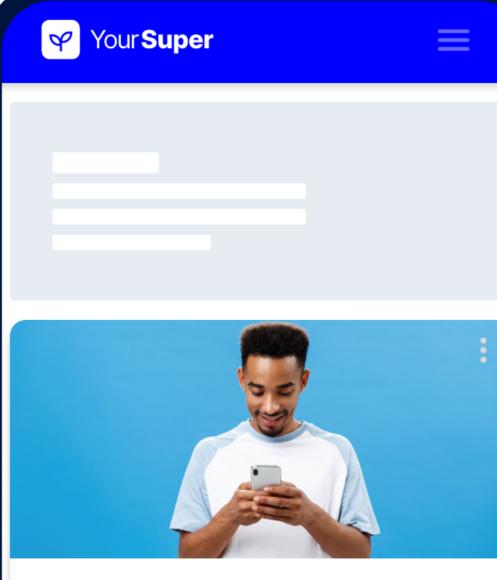
Self-Service

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.





CONTACT SUPPORT

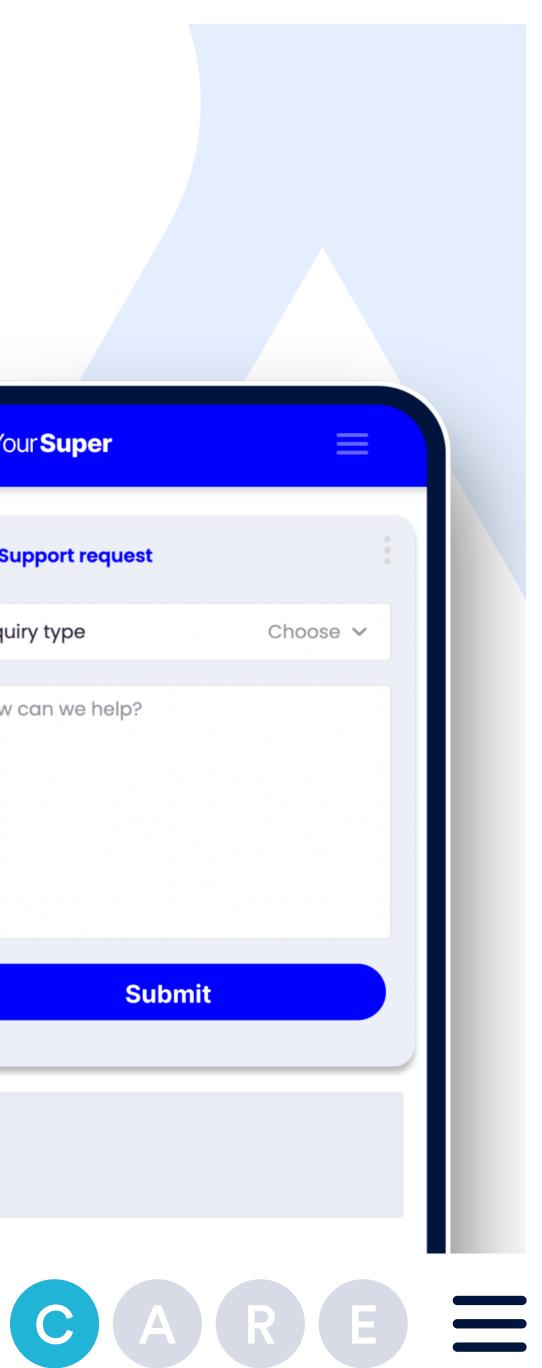
Cindy, we're here to help!

Visit our support center or open up a new support ticket. Our team should be in touch within 2 hours.

Open a support ticket

Visit the support center

Your Super	
← Support request	
Enquiry type	Choose 🗸
How can we help?	
Subr	nit





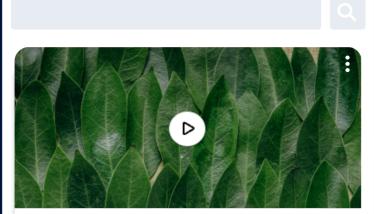
Self-Service Automated Investments

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.



Your **Super**



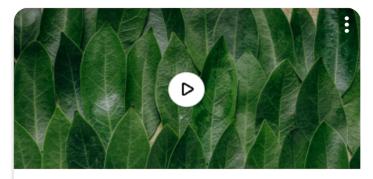


AUTO INVESTING

Josh, have you thought about automating your investments?

It looks like you invest new funds regularly. Did you know we can automate some of your investing and save your time?

Set up automatic investments



AUTO INVESTING

Josh, have you thought about automating your investments?

It looks like you invest new funds regularly. Did you know we can automate some of your investing and save your time?

Set up automatic investments







MATTERS

"65% of consumers expect to be offered targeted promotions"









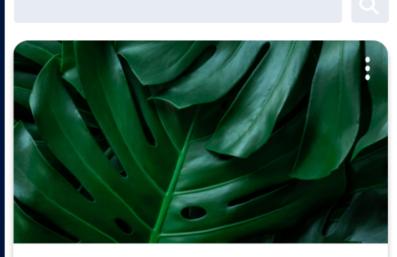
Offers & Promotions New Rewards

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.



Your**Super**

Your Super



A new YourSuper reward has landed!

Get 10% off your next shop at YourShop with your exclusive YourSuper member discount.

Access reward



A new YourSuper reward has landed!

Get 10% off your next shop at YourShop with your exclusive YourSuper member discount.

Access reward





S 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"









Data Capture

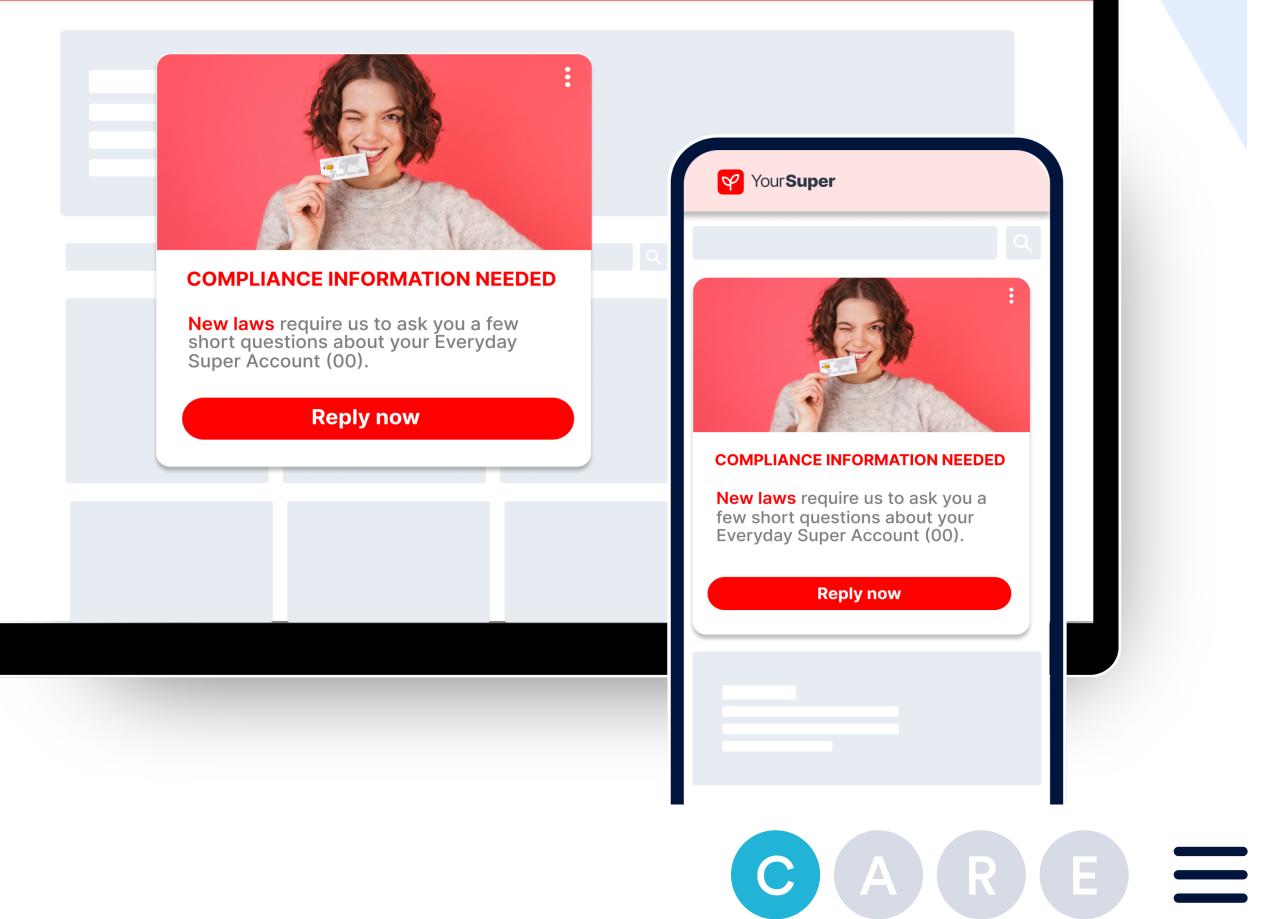
Compliance Checks

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.



Your Super





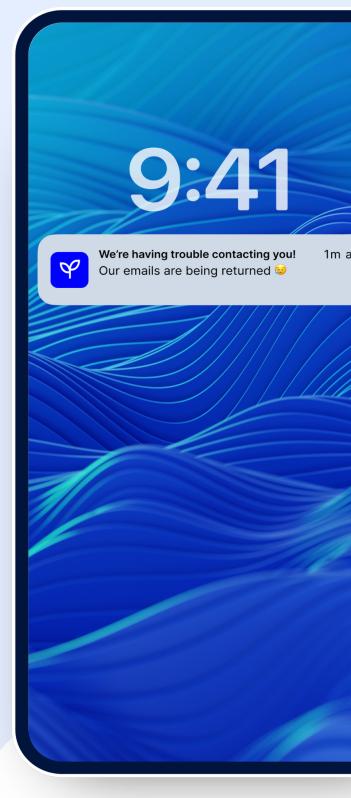


Data Capture

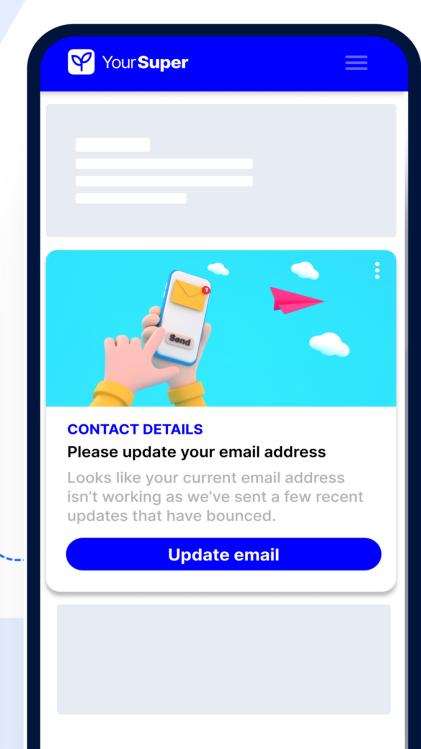
Contact Details Updates

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.







P	/our Super	Ξ
	to Empli	:
	i <mark>te Email</mark> se enter your current email	
addr	ess and we will send a	
conf	irmation email shortly.	
En	nail	
	Submit	







MHX IT MATTERS

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









IMPROVE CUSTOMER ACTIVATION

Alerts & Approvals Unusual Account Login

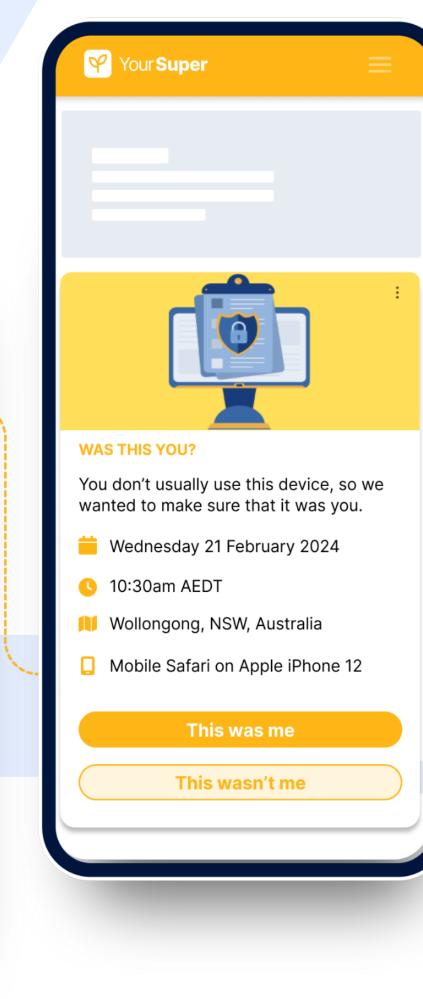
Suspicious logins can be an extremely sensitive customer experience. By not only notifying a customer the minute an unusual login takes place, but also allowing them the option to take action instantly, you provide a best-in-class experience for customers.

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



9:41

Unusual login alert A 1m ago We detected a new login to your account. Please confirm this was you.



⁷ Your Super	
UNUSUAL LOGIN	
nk you for confirming this wasn't you. ct which actions you would like to tak strongly recommend logging out of all changing your password.	e.
og me out of the new device	
og me out of all devices	
Change password	
Submit	







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.



Your Super

Approval required

Withdrawal approval pending

Your request has been received and an email has been sent to your joint account holder Jane Doe for their approval.

We'll let you know once they have given approval and we have processed this withdrawal.

Dismiss

Withdrawal approval pending

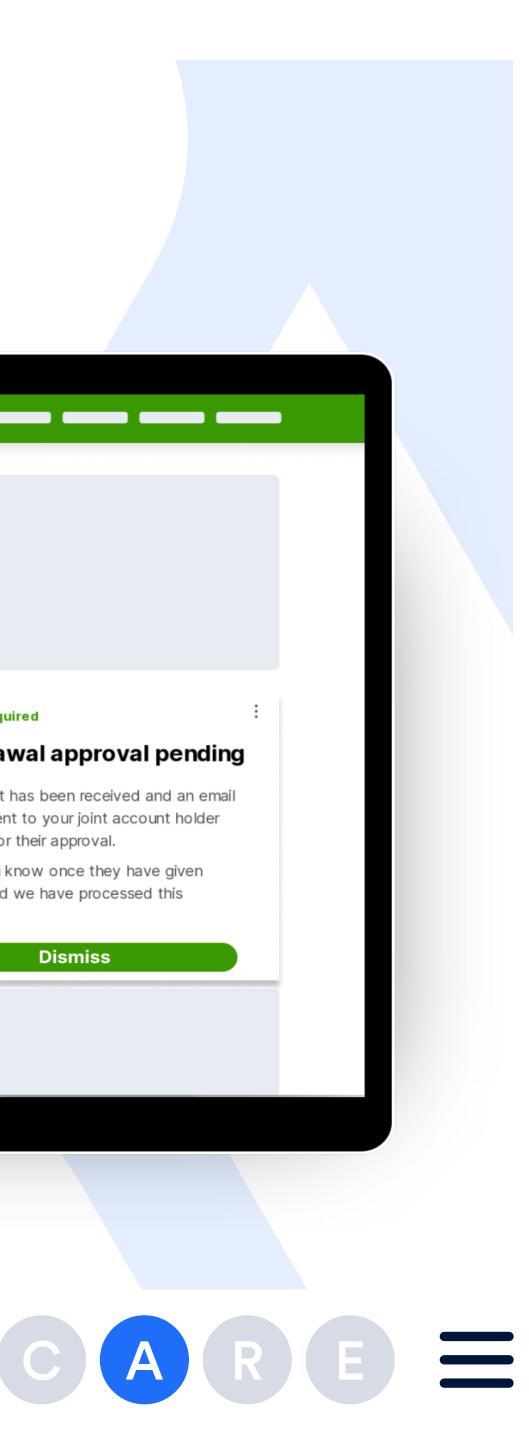
Your Super

Approval required

Your request has been received and an email has been sent to your joint account holder Jane Doe for their approval.

We'll let you know once they have given approval and we have processed this withdrawal.

Dismiss



Onboarding & Activation

WHY IT MATTERS

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









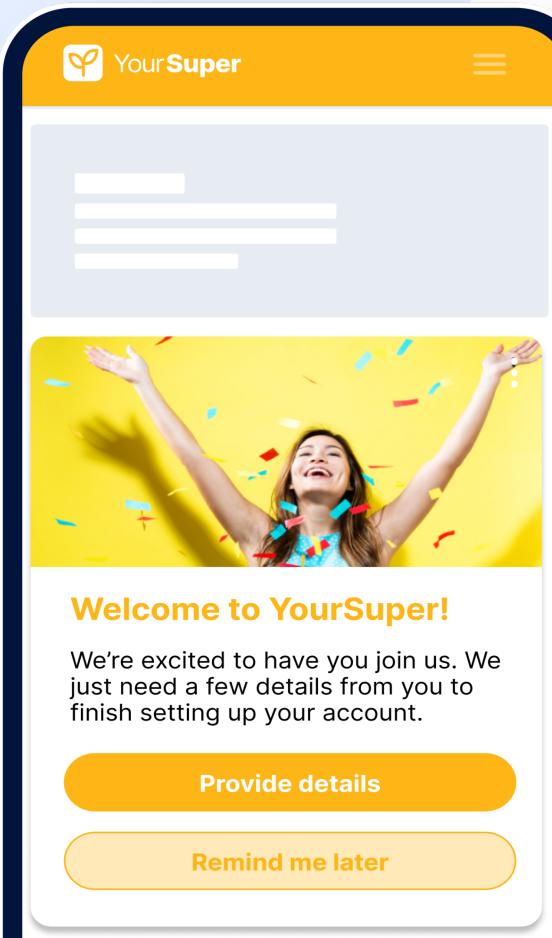
IMPROVE CUSTOMER ACTIVATION

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.





Your **Super**

Update details

Please enter your mailing address and tax file number and you'll be good to go!

Address

Tax file number

Submit

 $CARE \equiv$

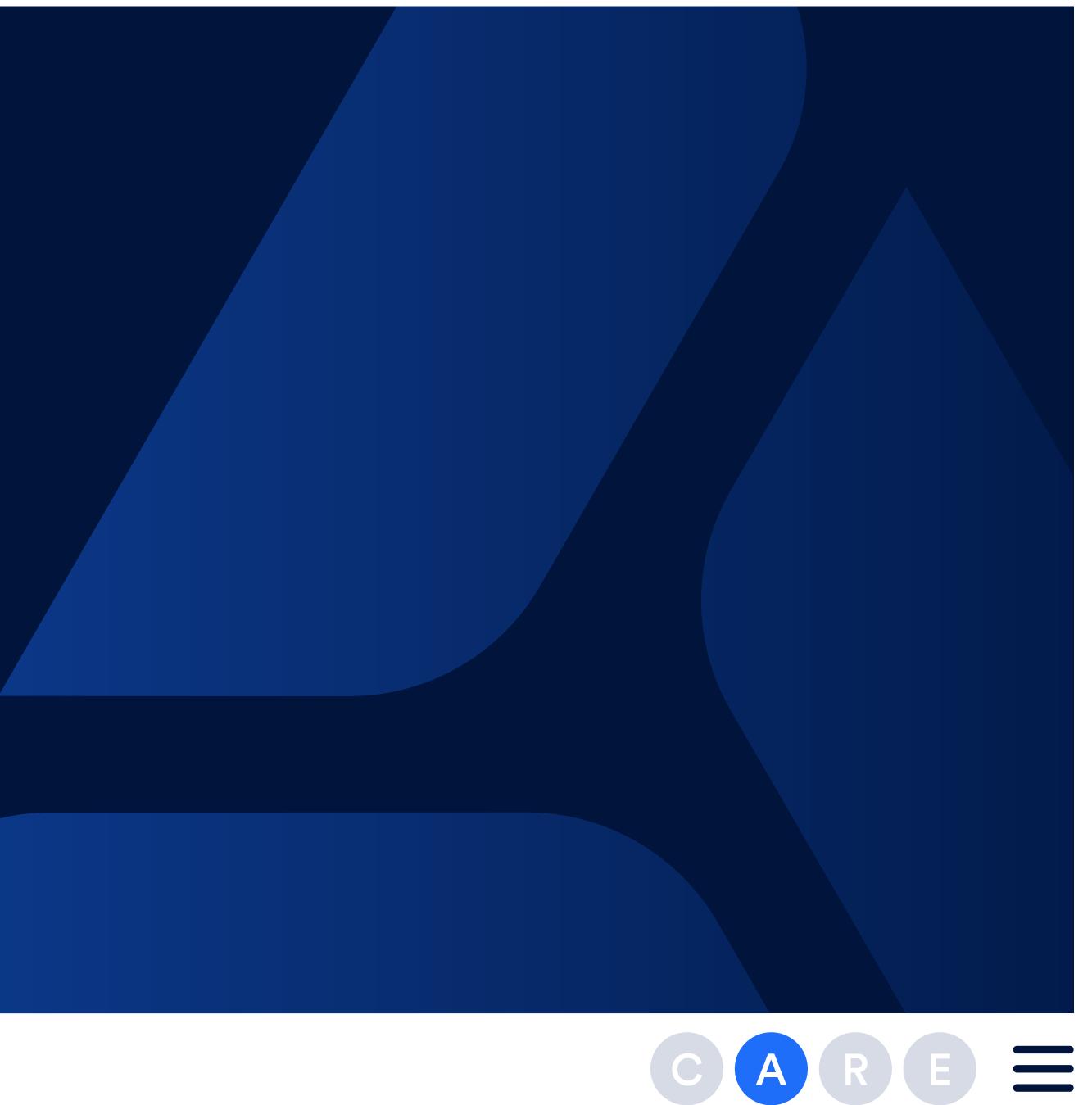




MHX IT MATTERS

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









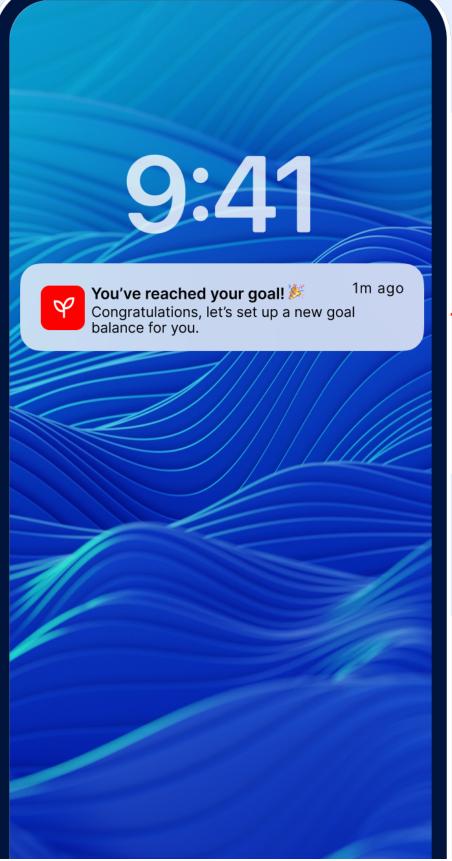
IMPROVE CUSTOMER ACTIVATION

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.









ACCOUNT BALANCE GOAL

Nice work Nicole, your Super account balance has passed your target of \$50,000!

With \$50,128 in your account, is it time to set yourself a new goal?

Set a new goal

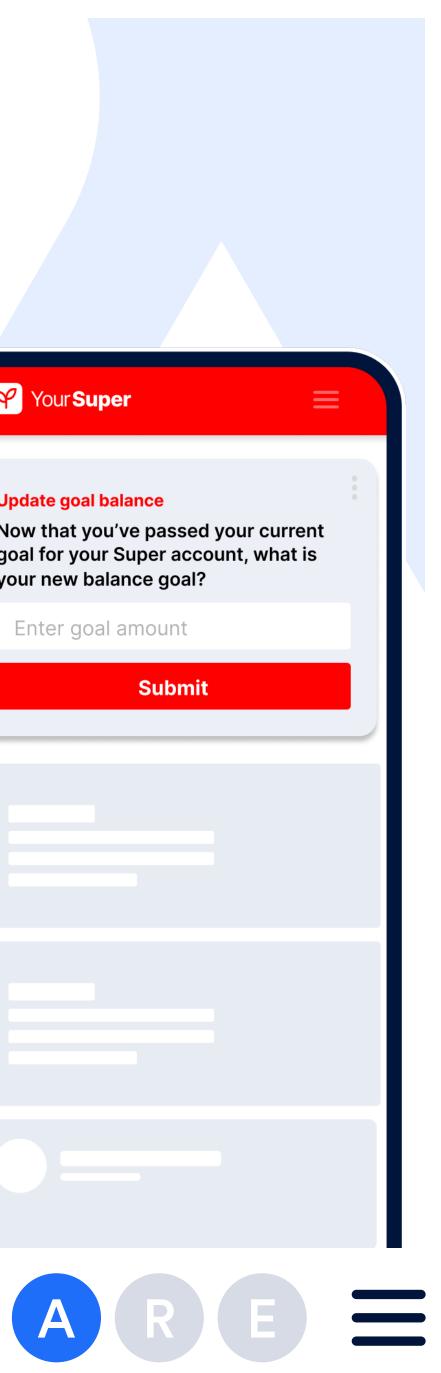
Your Super

Update goal balance

Now that you've passed your current goal for your Super account, what is your new balance goal?

Enter goal amount

Submit



Example 1 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."









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.



Your Super



Monthly Market Updates

Learn more about what's happening in the market and the best investment opportunities for you.

Learn more

Dismiss



Monthly Market Updates

Learn more about what's happening in the market and the best investment opportunities for you.

Learn more

Dismiss







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.



Your Super

INVESTMENT INSIGHTS

Your Super

Way to go Johanna, your investments performed well this quarter! 🐹

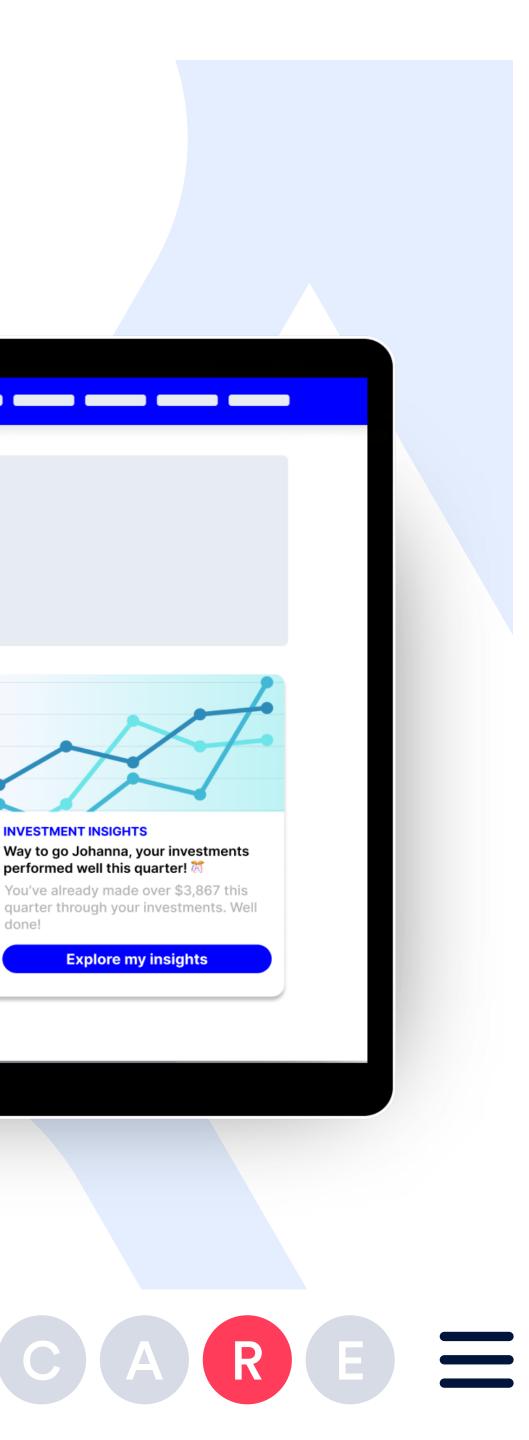
You've already made over \$3,867 this quarter through your investments. Well done!

Explore my insights

Way to go Johanna, your investments performed well this quarter! 🐹

You've already made over \$3,867 this quarter through your investments. Well

Explore my insights



Outreach & Surveys

NHX IT MATTERS

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









Outreach & Surveys

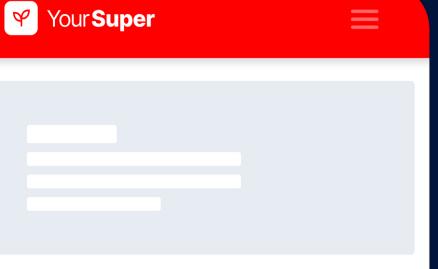
Feedback

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.



Your Super





HOW DID WE DO?

We apologise for any inconvenience caused during the recent website outage. Your satisfaction is our priority, and we would like to hear about your experience.

Yes, I was happy

No, I was not happy



HOW DID WE DO?

We apologise for any inconvenience caused during the recent website outage. Your satisfaction is our priority, and we would like to hear about your experience.

Yes, I was happy

No, I was not happy





WHY IT MATTERS

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









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.





⊡

Your Super top-up has landed 🎉 1m ago Well done, you're \$532 better off!



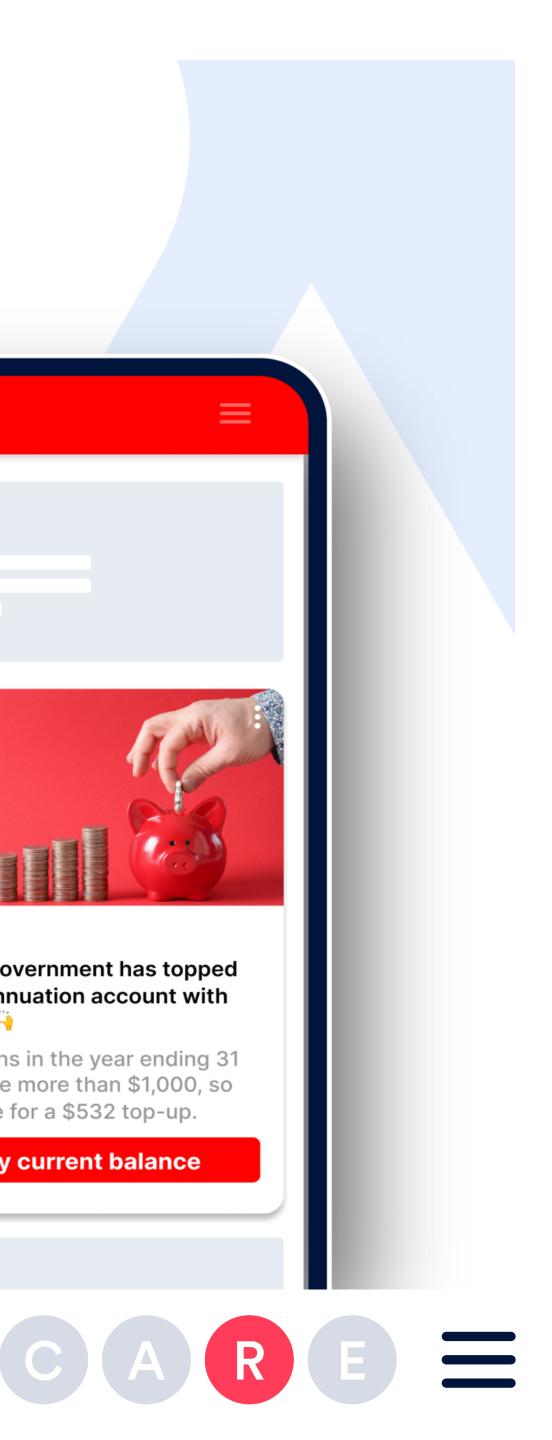


TOP-UP

Looks like the Government has topped up your Superannuation account with an extra \$532! 🙌

Your contributions in the year ending 31 March 2023 were more than \$1,000, so you were eligible for a \$532 top-up.

Review my current balance



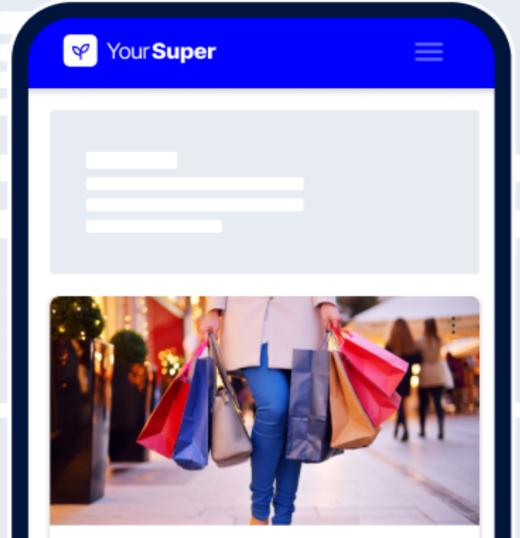


Loyalty & Rewards Rewards Rewards Rewards Remard Reminders

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.



YourSuper



YourSuper Rewards

Don't forget to use your member rewards!

As a YourSuper member, you can save on movie tickets, attractions, and more. Explore the latest offers now.

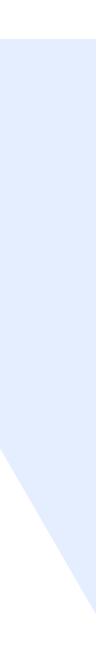
Use your rewards



Don't forget to use your member rewards!

As a YourSuper member, you can save on movie tickets, attractions, and more.

Use your rewards





WHY IT MATTERS

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











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.



Your Super



Your Super

CRITICAL WEBSITE OUTAGE

YourSuper's website will be unavailable between midnight and 4am tonight.
All YourSuper apps and websites will be unavailable

Automatic payments are unaffected

Notify me when available

CRITICAL WEBSITE OUTAGE

YourSuper's website will be unavailable between midnight and 4am tonight.

- All YourSuper apps and websites will be unavailable
- Automatic payments are unaffected

Notify me when available





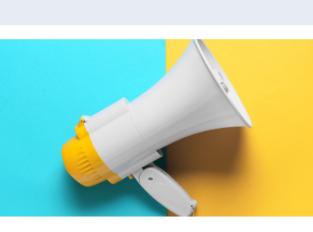


Announcements

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.





CRITICAL UPDATE

Your Super

Sorry Ross, we're experiencing unexpected delays processing deposits! **A**

Don't worry, your available balance will be up to date shortly and no investment you make will be affected.

Notify me when resolved

Your Super

← Notify me when resolved

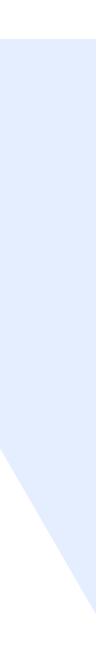
When we've resolved this issue, how would you like to be notified?

Push notification

Email

Notify me







MATTERS

"71% of consumers expect companies to deliver personalised interactions"









Personalised Updates

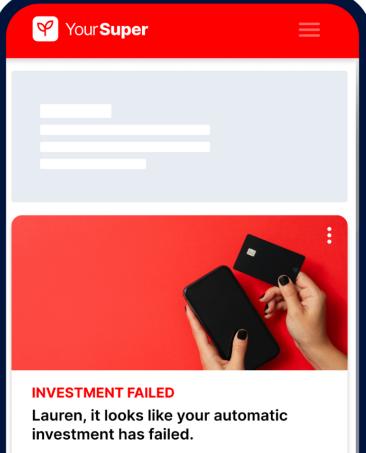
Failed Automatic Investment

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.





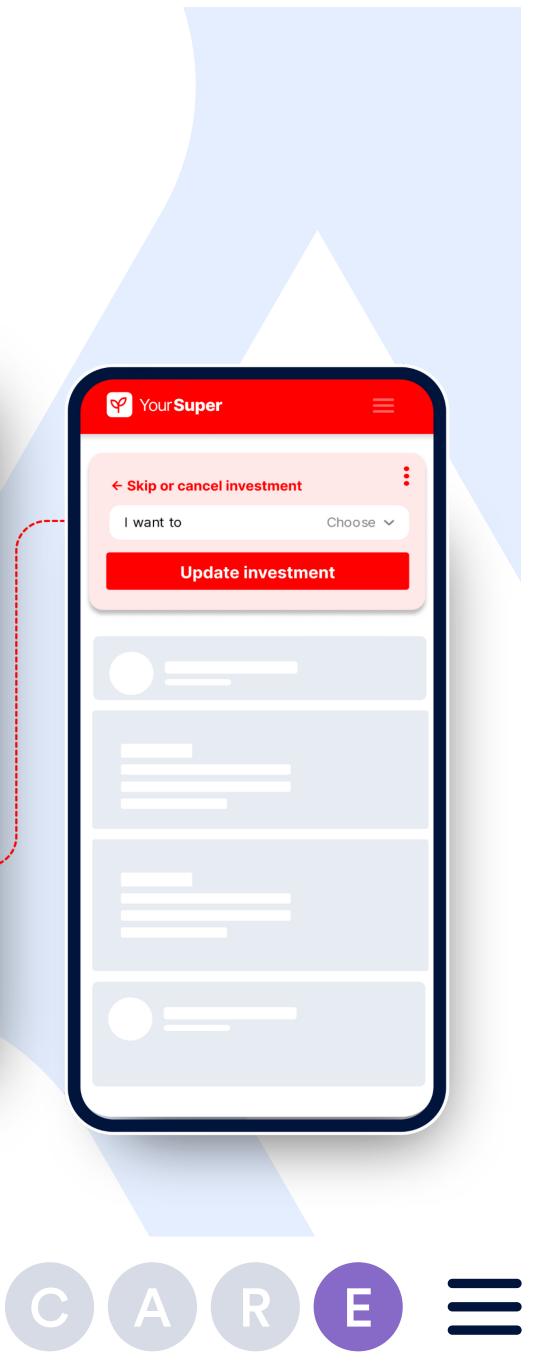
Uh oh! Your payment failed. Looks like your automatic payment did t ao throuah



We'll try again tonight at 10pm AEST, but if you'd prefer that we didn't, please let us

Skip or cancel investment

Your Super	≡
← Skip or cancel investment	:
I want to	Choose 🗸
Update investme	ent





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.









Nice work Tim, your Super account balance has reached \$50,000!

Keep up the momentum and learn more about how you can supercharge your investments.

Learn more



Nice work Tim, your Super account balance has reached \$50,000!

Keep up the momentum and learn more about how you can supercharge your investments.

Learn more







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.



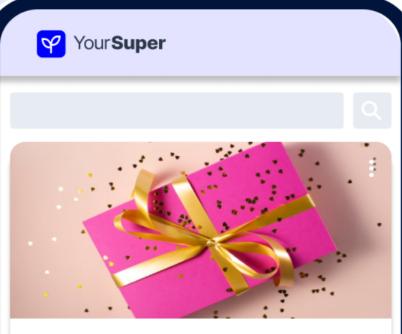




The government has topped up your Super

Your contributions in the year ending 31 March 2021 were more than \$1,000 making you eligible for a \$512 top-up from the government. Nice work!

View fund balance



The government has topped up your Super

Your contributions in the year ending 31 March 2021 were more than \$1,000 making you eligible for a \$512 top-up from the government. Nice work!

View fund balance





Fi Education

WHY IT MATTERS

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









Education

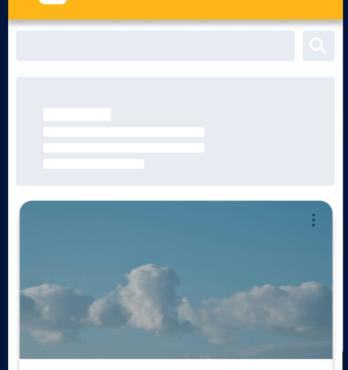
Combine Accounts

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.



Your Super

Your Super



Do you know where your Super is?

If you have multiple Super accounts, you could be missing out on earning thousands of dollars. Consolidate your accounts today.

Learn more



Do you know where your Super is?

If you have multiple Super accounts, you could be missing out on earning thousands of dollars. Consolidate your accounts today.

Learn more







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.

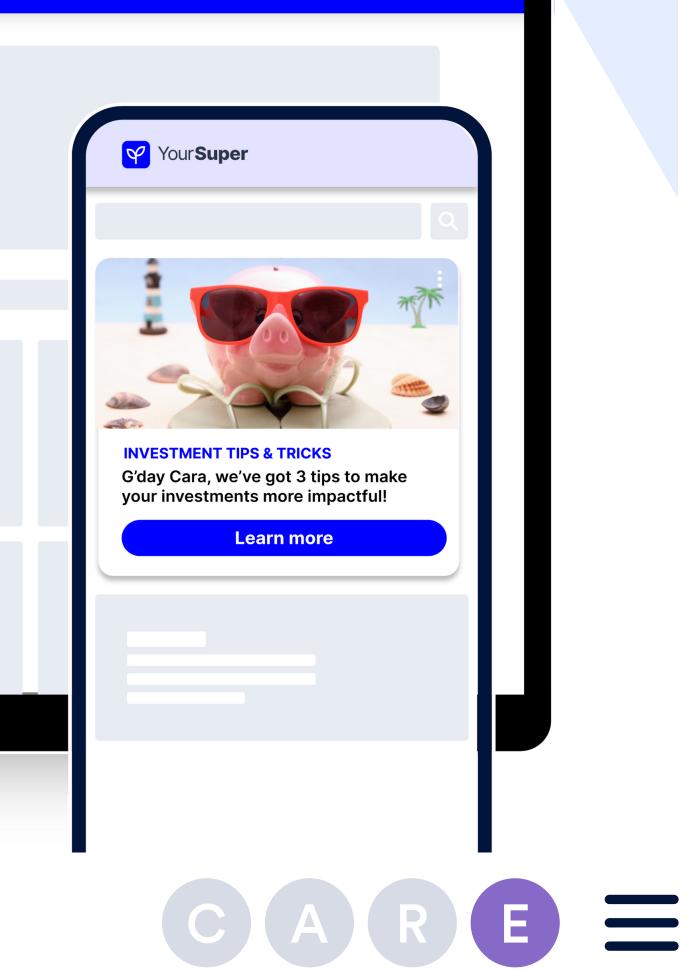


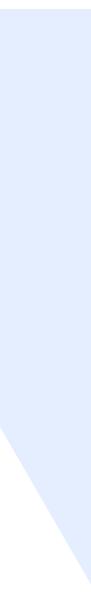




INVESTMENT TIPS & TRICKS G'day Cara, we've got 3 tips to make investments more impactful!

Learn more







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.



Your Super

Your Super



How Superannuation works

Check out our guide 'Superannuation for Beginners' to find out how Super works and how you can make the most of yours.

Read the guide



How Superannuation works

Check out our guide 'Superannuation for Beginners' to find out how Super works and how you can make the most of yours.

Read the guide



