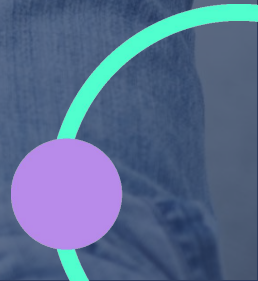




#01 Solved

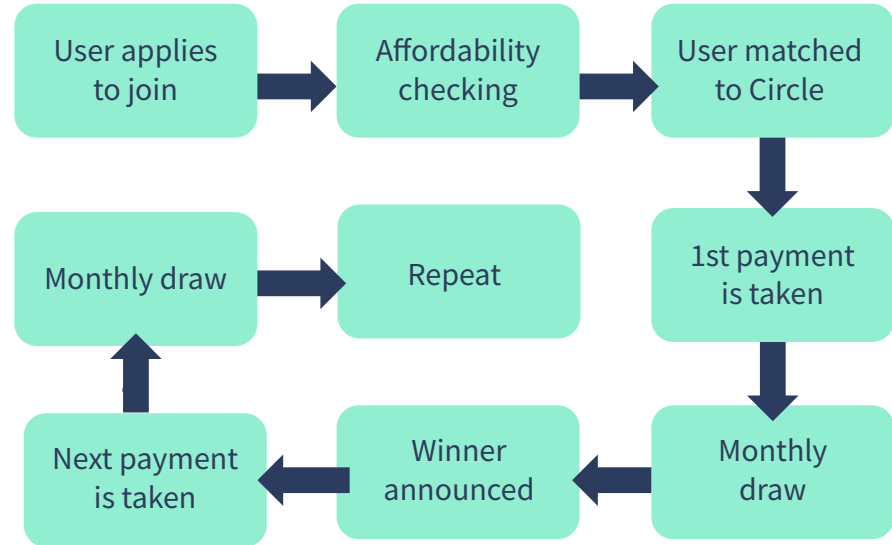
How do you create a 100% digital user journey for a social product?





What is embedded in the StepLadder member journey?

1. Contact creation
2. Affordability checking
3. Circle matching
4. Payment processing
5. Monthly draw management
6. Renewals and habituation





Optimised onboarding process to reduce the number of 'stuck' customers



Member Engagement



Circle Matching



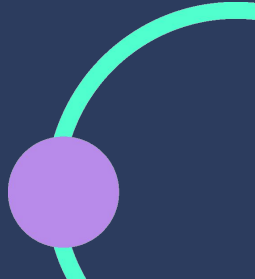
On-boarding & Verification



- Online, chatbot and CRM integration
- Ongoing content via email and WhatsApp
- Basic enquiry through Q&A
- Standardised and compliance approved public facing FAQs

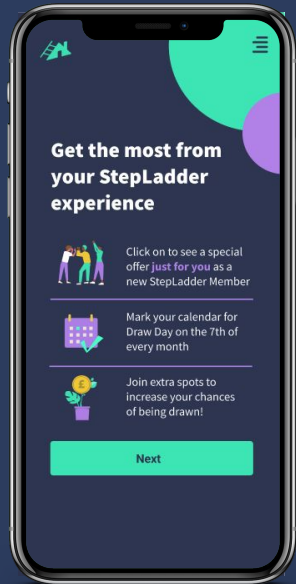
- Online submission of Apply form & credit quote
- Parameter queries for profile, i.e. finances, demographics, suitability factors, etc.
- Invitation to join specific circle when matched to complete group

- Host personas introduced
- P2P platform secure & password protected
- T&C agreements executed; quiz
- Verification documents submitted & credit checked

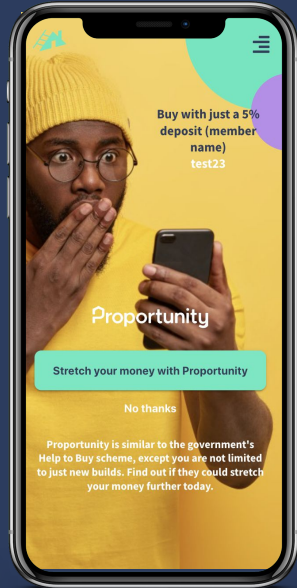




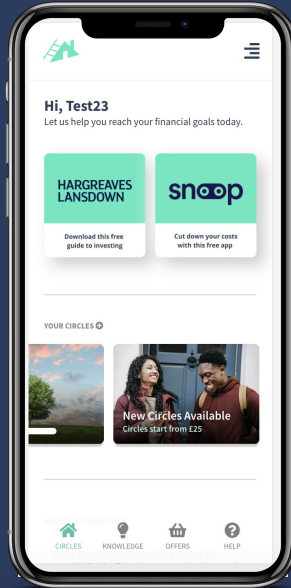
The digital journey: touch points



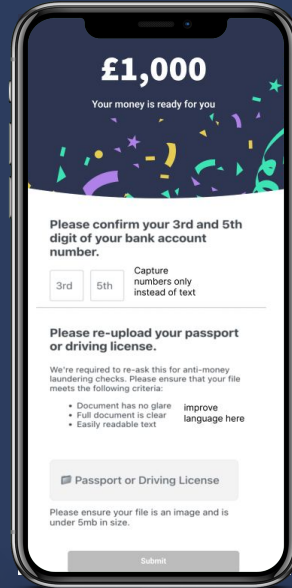
Headlines and simplicity vital



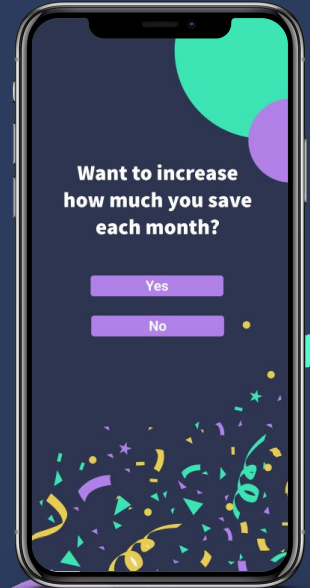
Never too early for a targeted Cross Sell



Dashboard with personalised resources



Managing custody of funds



Organic renewal



With StepLadder, take your conversion from 1% to 30%

The bar chart shows real data for StepLadder's conversion statistics

