



Capital Group/American Funds

Transforming digital strategy on personal investment platforms

Eric Shumake: UX Research and Strategy, 2018

Context:

Capital Group is an American financial services company. It ranks among the world's oldest and largest investment management organizations, with \$1.87 trillion in assets under management.

Challenge:

Capital Group was not replicating their success rates with American Funds from live advisors to personal investment platforms.

Capital Group's success with in-person, one-on-one advisors was not translating to personal investment platforms resulting in significant erosion of market share in this rapidly expanding channel.

Solution:

Complete UX audit of all major personal investment platforms and competitors with recommendations based on best-practices including e-commerce.

A revolutionary set of recommendations, from free and simple to robust industry-wide disruptions to recreate their in-person success.

Results:

- Complete user experience audit and brand playbook based on analysis of all significant personal investing platforms including Fidelity, Schwab, and E-Trade.
- Established current industry benchmarks, opportunities and threats in the particular investment platform ecosystem to discover opportunities for increased revenue and share-of-voice in 3rd-party private investing channels.
- Capital Group has applied both our recommendations and our lens to reinvent marketing on personal investment platforms.