

A LEADING BANKING PROVIDER

– APPLAUSE CASE STUDY –

CUSTOMER

With many competitors in the banking space, any friction during the account creation process can spur users to abandon sign-up and seek out another provider. Smooth onboarding for new customers has become a priority in the industry, as digital-only, branchless competitors enter the financial space. Speed wins in this ultra-competitive market — if one bank makes it difficult to open an account, five more stand ready to serve customers with a few clicks of a button.

A leading banking institution known around the world, this company counts on a variety of new customer onboarding initiatives to maintain its growth. Whether in support of a new checking or savings account, sign-up bonuses are a big draw for customers all around the world.

CHALLENGE

The banking company began marketing offers for new customers for various checking and savings account products. However, the internal testers couldn't validate these offers. To sufficiently test the offer, the bank needed legitimate, net-new accounts, which internal testers were unable to provide or simulate.

Sure enough, some new customers began to experience issues: offers were not added to their accounts during registration. To make matters worse, the company had very little visibility into the issue. The company couldn't identify the root cause, and couldn't reproduce the issue, as the internal QA team was composed entirely of existing account holders.

The company needed videos from real customers experiencing the issue to correctly determine where the problem occurred. Yet, the QA team couldn't sufficiently source these videos from new customers. With staff unable to identify or verify the issue with sign-up offers — let alone fix it — the new promotion seemed on the verge of failure.

COMPANY

A leading banking provider

INDUSTRY

Banking

TESTING TYPES

Functional Testing

APP TYPES

Mobile | Web

CHALLENGES

- Lack of visibility into new customer journeys
- Issues arising during customer onboarding
- Inability to test promotions to new customers

RESULTS

- Access to tester videos of net new customers journeys
- Validation of new promotions before launch
- Improved onboarding through tester feedback
- Net-new testers to the bank available for each product launch

SOLUTION

The banking company turned to Applause to gain visibility into their account signup issues. Applause worked with the company to identify target demographics for new account holders and criteria to reproduce the issue.

Applause sourced testers to apply for new checking and savings accounts. With this in-the-wild approach, Applause vetted, managed and trained testers new to the bank to reproduce and record the issue, giving the company visibility that it couldn't achieve internally. Applause testers created screen recordings as they registered for new accounts and user IDs — giving the company insight into its account opening process flow, from promotion to enrollment and offer fulfillment. These outside testers not only helped the company identify the issue and correct it, but also better understand its customer journey.

Today, the company continues to rely on Applause for insight into the customer journey and visibility of new digital defects. Applause provides net-new digital experts to the bank who identify and detail points of friction with software releases on an ad-hoc basis. Members of the Applause community conduct structured test cases on desktop and mobile devices to confirm that customers receive new products as intended.

RESULTS

For new product releases, Applause provides early visibility to the bank's developers. Applause testers catch issues pre-launch, giving the bank confidence in its in-market experience.

Applause testers provide videos and data points to give the company the information it needs to make bug fixes. For example, one tester found a critical issue in which they were blocked from registering with a new account, receiving an unclear error message that asked for unspecified information.

Through engagement with Applause, the company can now verify that new customers can successfully redeem promotional offers, helping ensure a consistent stream of new revenue for the company. Feedback from Applause testers help the company reduce friction across all of the registration processes.



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ABOUT APPLAUSE

Applause is the worldwide leader in enabling digital quality. Customers are no longer satisfied with digital experiences that are good enough; they demand the exceptional. The Applause Product Excellence Platform provides the world's leading brands with the comprehensive approach to digital quality needed to deliver uncommonly great digital experiences across the globe — with highly vetted testers available on demand, a complete and enterprise-class technology infrastructure, multi-point digital quality solutions and SaaS products, and expertise across industries and use cases. This harmonized approach drastically improves testing coverage, reduces costs and speeds time-to-market for websites, mobile apps, IoT and in-store experiences. Thousands of leading companies — including Ford, Google, Western Union and Dow Jones — rely on Applause as a best practice to deliver the exceptional products and digital experiences their customers love.

Learn more at: www.applause.com