



CUSTOMER EXPERIENCE EXAMPLE

Sally Short isn't saving for her life after work and doesn't know how much she might need to live on when she retires. Here's an example communication campaign might take help her see the need to start saving and build her awareness and understanding you might take to so she takes action.

	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Year 1		
Phase/ Time	Creating need	Awareness	Understanding	Call to action	Action	Welcome Pack	Quarterly/ Bi-annual newsletter	Quarterly/ Bi-annual newsletter	Annual statement
Channel	Ecards, Posters, Targeted Emails, Reminders Ensure that your campaign system tracks activity (online, by phone, social media and with internal stakeholders.) Act on activity by developing reminders and follow up actions as part of your overall planning process				Website sign in/HR contact	Full online experience or combination of hard copy and digital	Online or hard copy	Online or hard copy	Online or hard copy Think about face to face and more in depth learning
Message	Can you live on £160 a week?	Are you losing out on Free Money?	Don't let your pension be average.	Your life after work – take control!	How to join – sign up/log in here	Hello Sally, great news that you're getting ready for life after work!	Sally, what is your retirement goal? We've tools to help you save and learn more about investments and help you get to where you want to be.		Sally, see how you're doing against your goal. Are you on track?
Reaction	I receive an eCard about pensions. I didn't realise the state pension was only that amount, but I don't know if I could live on that. I might do something sometime.	I've got another eCard. I hadn't thought about it like that, maybe I should find out some more. I could just sign up now, I will get round to it sometime.	Another eCard. Well that sounds a bit like me. They're getting my attention now. That's a little bit scary – but I get the message – I must do something.	Another e-Card, well clearly it's important. It does sound really easy, just do something however small and build it up over time. I'm going to sign up.	Another e-Card, well clearly it's important. It does sound really easy, just do something however small and build it up over time. I'm going to sign up.	That's it, I have done it. I can stop worrying and find out more. There's things here to help me do that. Nothing's urgent, I just need to look at it every now and again.	There's plenty of tools here to help me and I liked the magazine-style to the newsletter. It just makes pensions seem easier and accessible.		OK, so I can see that my employer has paid in £xxx. That's a start, but its not going to get me to my goal. How much more can I save? I also want to find out more about my employer's matching contributions too.

This customer journey or experience is for illustration only. The format can used as a prompt to help you think about the journey needed for the member profiles you wish to target in your communication campaign.