



# Investment Journey Mapping Examples

METHODOLOGY

Online study with 401K plan participants.	In-depth telephone interviews with consumers having retail investment accounts.	In-depth interviews with top tier defined contribution financial advisors selling 401K plans.	Online study of a particular investment firm's financial advisors	Bi-annual online study of advisors of a particular financial services company.
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<b>401K Participant Engagement Drivers</b>	<b>Investment Tools Satisfaction</b>	<b>401K/403b Advisor Journey Mapping</b>	<b>Advisor Tools &amp; Solutions Satisfaction</b>	<b>Advisor Satisfaction Tracking</b>
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OBJECTIVES

To explore expectations, experiences and perceptions to determine drivers of engagement and satisfaction.	To obtain feedback regarding 2 specific online investor tools offered by the client to the investor.	To explore and map the advisor journey in terms of quoting and placing 401K plans.	To determine/trend satisfaction, brand favorability and loyalty, based on usage, importance and satisfaction with solutions and tools.	To measure and track satisfaction, understand trends and the use of tools & techniques for sales and for working with clients
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