

Tech Talk 2:  
Driving Digital Fluency,  
Adoption and Growth

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#FXT24

# DIGITAL GROWTH PLATFORM

for FIs and fintechs



**Staff don't have to  
bank with their  
employer**

**If they don't use your  
tech, they can't  
promote or support it**

**They don't have the  
right tools to grow your  
digital banking  
business.**

CHALLENGE

# TECH PARTNERS FOCUS ON TECH - NOT ENABLEMENT



Learning Experience

# TURN STAFF INTO DIGITAL EXPERTS

Engage. Educate.



PROVEN STRATEGY

# Engage

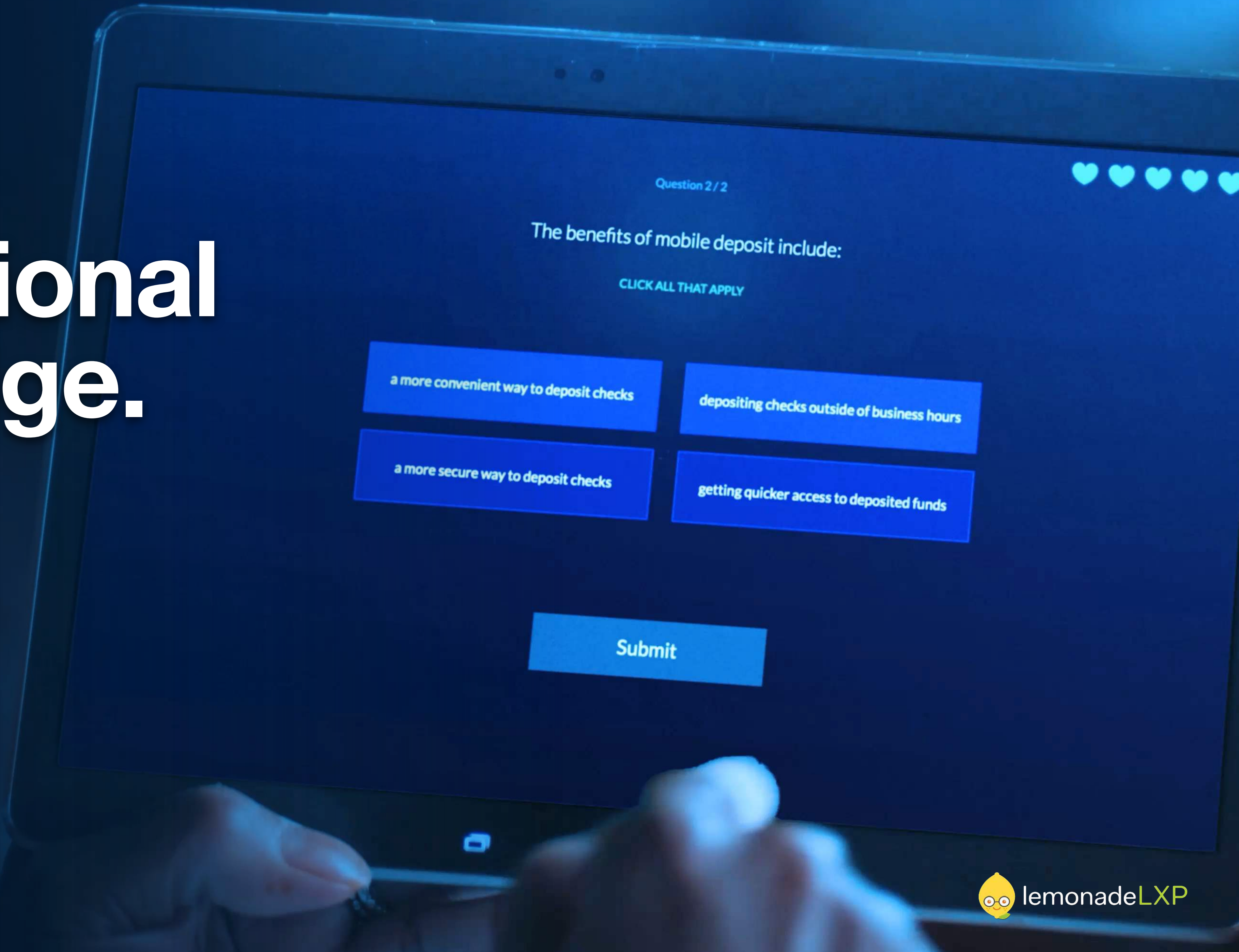
Participation. Practice. Mastery.



PROVEN STRATEGY

# Foundational knowledge.

Game-based.  
Bite-sized.  
Challenging.



**PROVEN STRATEGY**

# **Fluency**

**Knowledge. Confidence.**

**CX**

**PROVEN STRATEGY**

# **Advocacy**

**Creating digital  
ambassadors**

**CX**

PROVEN STRATEGY

# Participation. Practice. Mastery.

MOBILE DEPOSIT RULES AND REGULATIONS



0 of 2 found

Mobile deposit is an easy way for our clients to pay their bills on the go. Clients can access the service via our mobile app.

To use mobile deposit, the client must have a checking account with the bank, and be either a personal or small business banking customer.

New clients are eligible to start using mobile deposit immediately. Their initial deposit limit is \$500. This limit increases to \$500 after 3 months.

There is no fee associated with using mobile deposit. Clients are able to deposit as many checks as they need to each month, as long as they don't exceed their monthly monetary limit.

**DIGITAL ADOPTION PLATFORM**

# **The Adoption Aversion**

**Nobody wants to learn in  
their real bank account.**



DIGITAL ADOPTION PLATFORM

# Support Customers

Activate. Support.



DIGITAL ADOPTION PLATFORM

# Risk-Free Environment to Learn New Tech

Branded. Searchable. WCAG-AA





**DIGITAL ADOPTION PLATFORM**

# **Technology Walkthroughs**

**How & why**

**ADOPTION & ENABLEMENT**



**DIGITAL ADOPTION PLATFORM**

# **Branch Social Search/SEO**

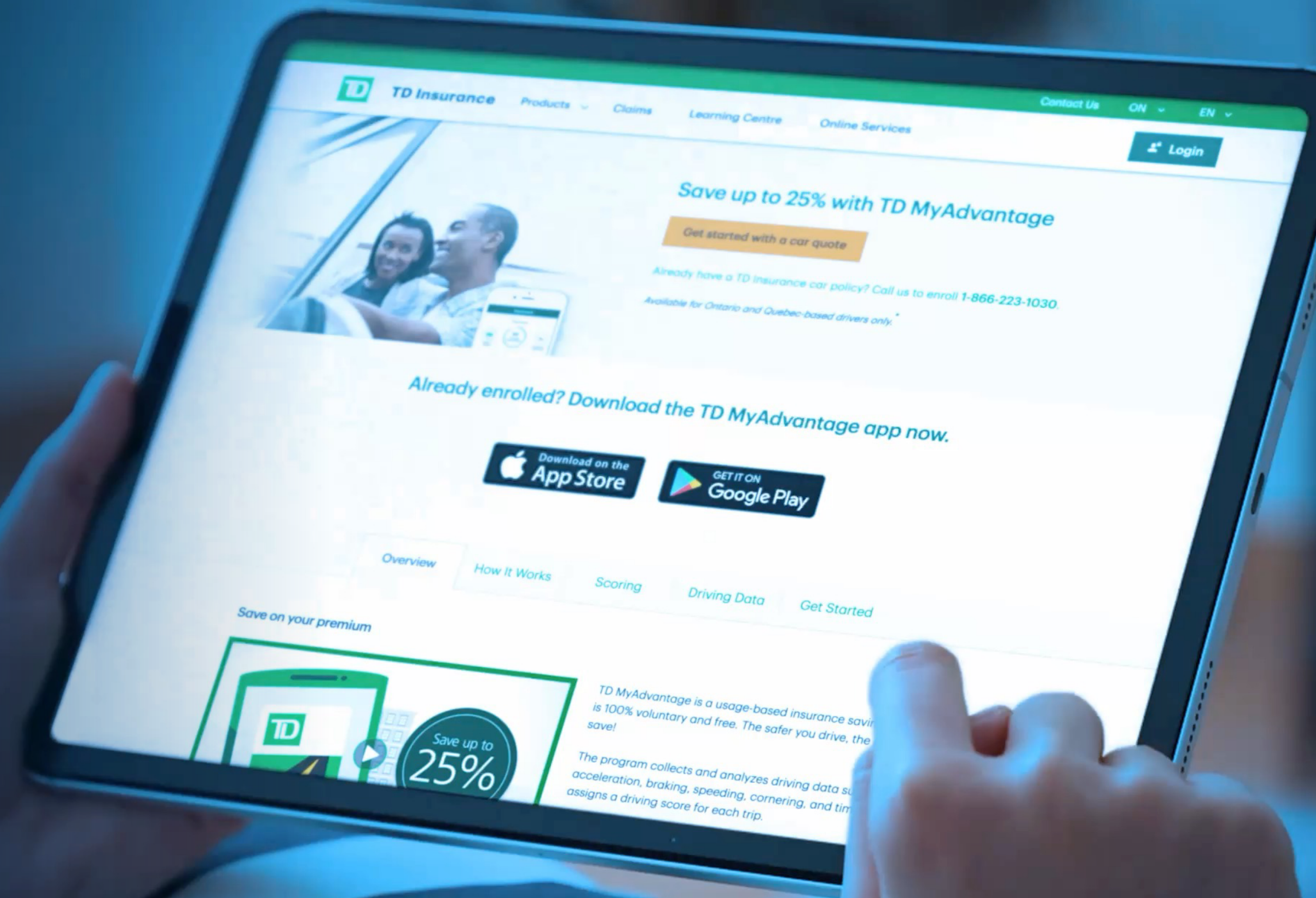
**AWARENESS**



DIGITAL ADOPTION PLATFORM

Product Pages  
Email Campaigns  
Customer Onboarding

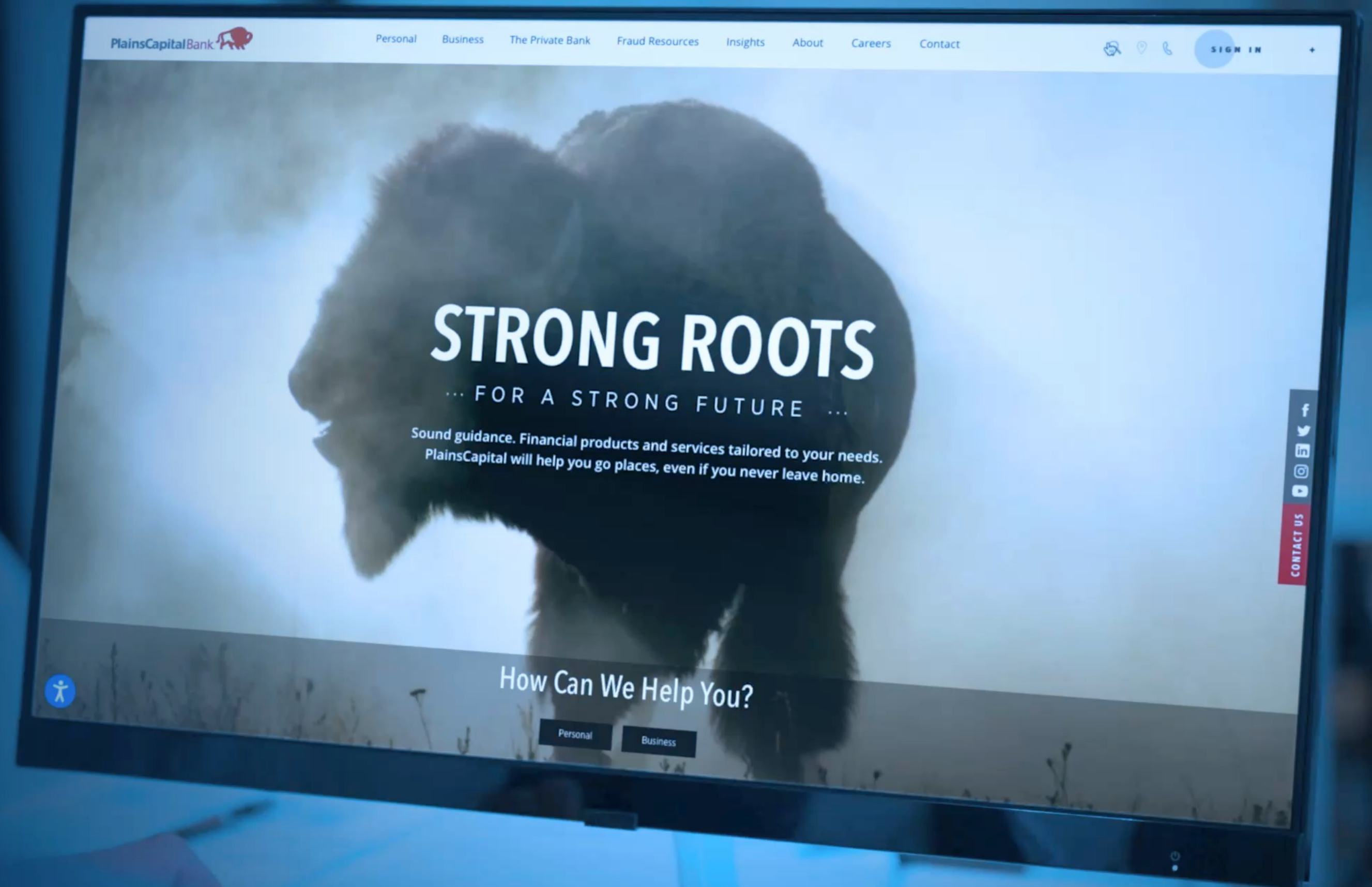
AWARENESS & TRIAL



DIGITAL ADOPTION PLATFORM

# Self-Help / On Demand

In the flow of work.

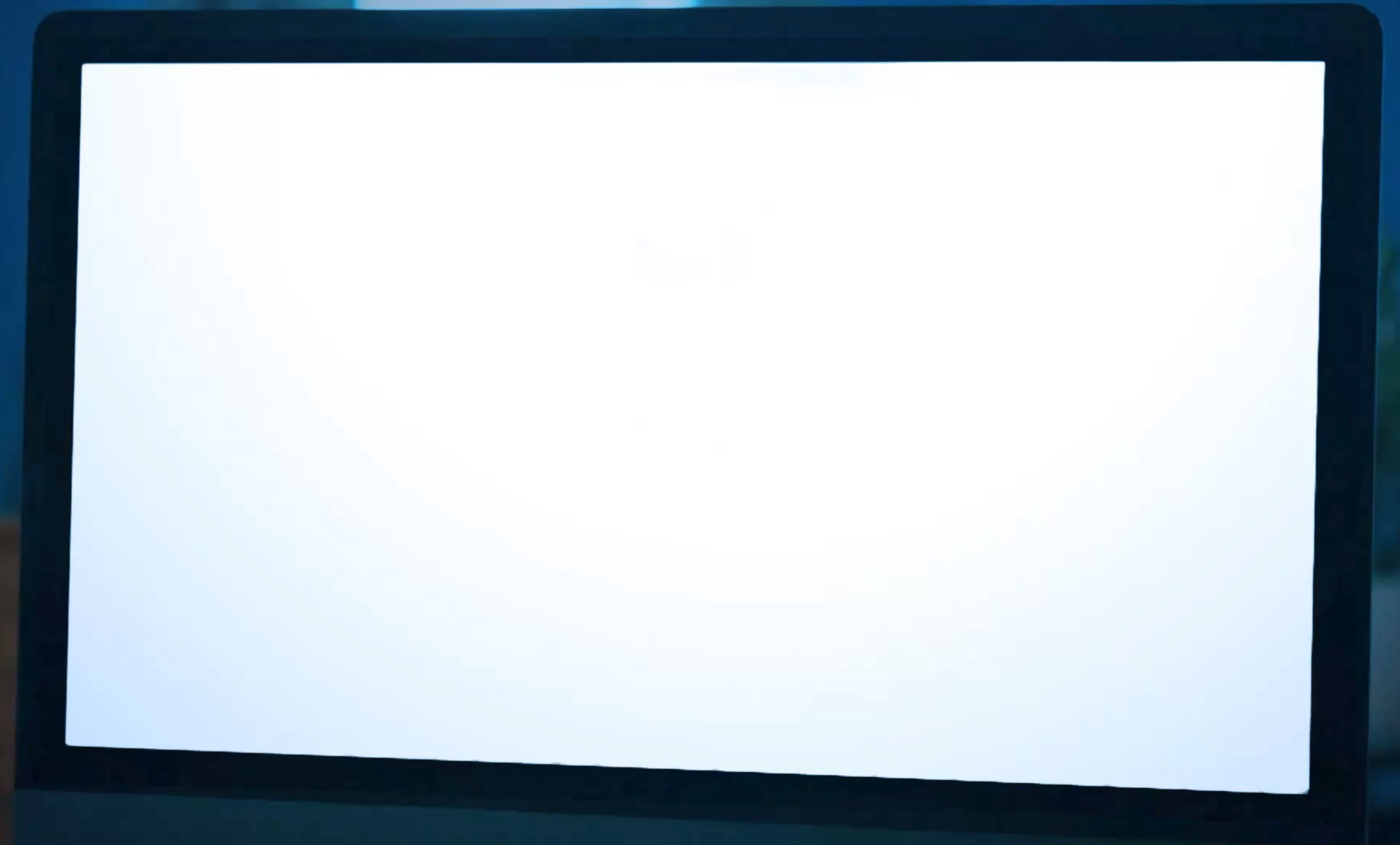


ON DEMAND SUPPORT

**DIGITAL ADOPTION PLATFORM**

# **Contact Center Chat Bot IVR**

**MEMBER SUPPORT**





## CASE STUDY

# One Nevada's Q2 Implementation



### Key challenges:

- Needed Q2 fluent staff ensure a positive member X through the implementation
- Traditional training was time consuming and resource intensive

Historical Implementations = 3 months of SME Training

Time to train staff went from one week to two days

**4**

**MONTHS**

Accelerated implementation

**71%**

**REDUCTION**

In training time

**6,300**

**LESS**

Support calls than expected

**75%**

**MEMBER**

Penetration in week 1

**\$214K**  
**SAVINGS**

# Use Cases



Tech Rollouts & Conversions



New Staff Onboarding



Driving Digital Growth



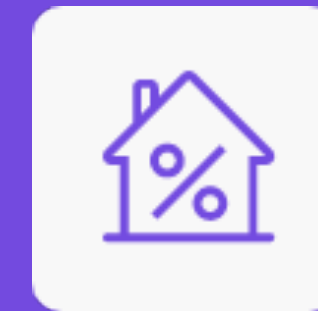
Contact Center



Mergers & Acquisitions



Fintechs



Mortgage



## CASE STUDY

# PSCU - Driving Operational Efficiencies



### 4 Key challenges:

- New Product rollouts
- Hands on training
- Employee Engagement
- Scheduling 24x7

30M calls a year across 3000 agents

35 Platforms across 1000 financial institutions

**50%**

**INCREASED**

Speed to proficiency

**6%**

**INCREASED**

CSAT Score

**22sec**

**REDUCTION**

In call time

**52%**

**DECREASED**

After call work

**56%**

**DECREASED**

Attrition



**Thank you!**