

### **EXECUTIVE SUMMARY**

- Our client is a leading financial services company that offers retail and wholesale banking, and wealth management services to individuals, businesses, high-net-worth individuals, and institutions through its subsidiaries.
- It had recently acquired another company which provided it the opportunity to expand its footprint and its brokerage service offerings by leveraging the acquired company's platform.

#### THE OPPORTUNITY

- The client needed to migrate new retail customers from the acquired client's platform to their banking platform and migrate current customers to the acquired client's brokerage platform.
- There was a need to assess and implement a refined value proposition and strategy for self-directed brokerage offers across multiple channels.
- Enhancements needed to be made to their mobile trading platform to remain competitive.

# **AT A GLANCE**



INDUSTRY Financial



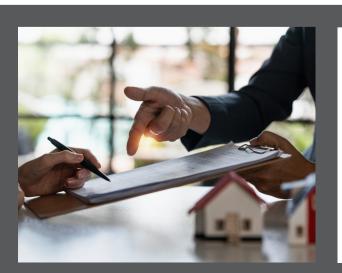
ORG SIZE 234,000



US/INTERNATIONAL
Headquarters in
US/International



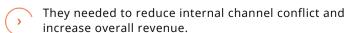
REVENUE \$73.8B

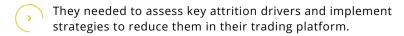


#### **OUR ASSESSMENT**

Mythos found that the acquisition required organizational realignments and improvements to be made for it to be a successful merger.







### WHAT WE DID

Mythos Group partnered to develop a client acquisition strategy to deepen penetration among target segments which would also see a significant financial upside.

- Collaborated in conducting customer interviews to better understand the customer's brokerage needs and perspectives which helped to drive activation, expand cross-sell, and deepen client satisfaction and loyalty.
- A customer communication and engagement strategy were developed to proactively send communication to keep clients informed on relevant legal, tax, and investing topics.
- A concept test with a pilot group for mobile banking was facilitated to gather feedback and behavioral observations on navigation, assess overall usability, and assess if the content was easy to access and wanted by the customer. These results helped refine the final product.
- Competitive analysis to identify and prioritize key enhancements from a brokerage platform was conducted.

## MAKING A DIFFERENCE

The cultural interventions comprised of carefully selected levers and critical behaviors that were adopted had a significant impact on evolving the culture in the desired direction.

# KEY RESULTS

Developed 5-year business plan for growth

Enhanced the self-service brokerage platform

) Increased customer penetration by 8%





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**Book a Consultation**