

Mapping (and Building) the Ultimate User Experience

Presented by Bailey Ronnebaum

Forbinfi

A VGM COMPANY



About Me

- Expecting baby girl
March 2024
- Dog & Cat Mom
- Business Development
Manager
- Marketing for 9 years
- LinkedIn:
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What does forbinfi do?

- Website Development
- Digital Marketing
- Brand Development
- Print Marketing
- Training and Coaching
- Managed IT Services



1 Big Topic...

5 Parts

I will answer...

1. What is User Experience (UX)?
2. What does a UX Designer do?
3. Why is it important?
4. How to get started
5. Financial website trends

...plus takeaways in between!

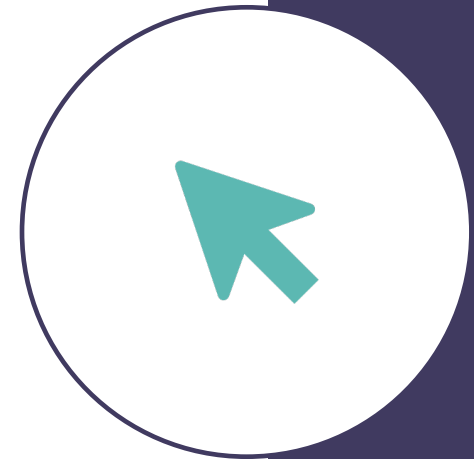


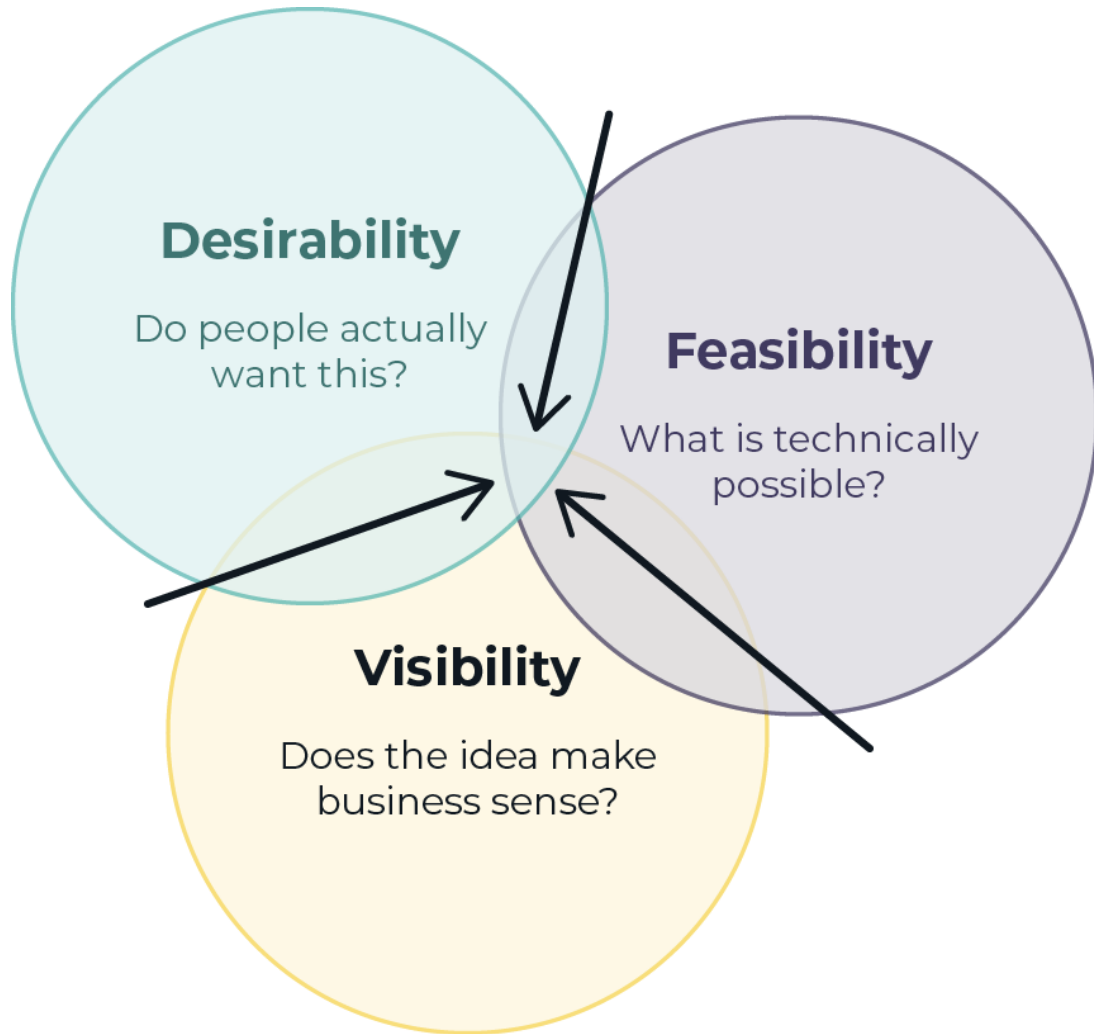
What is (UX) User Experience?

“We spend a lot of time designing the bridge, but not enough time thinking about the **people who are crossing it.**”

User Experience (UX)

- All aspects of someone's **interaction** with a company, its products, and services





UX manages the exchange of value between the user and the business.

Both sides need to be getting value or else things fail.

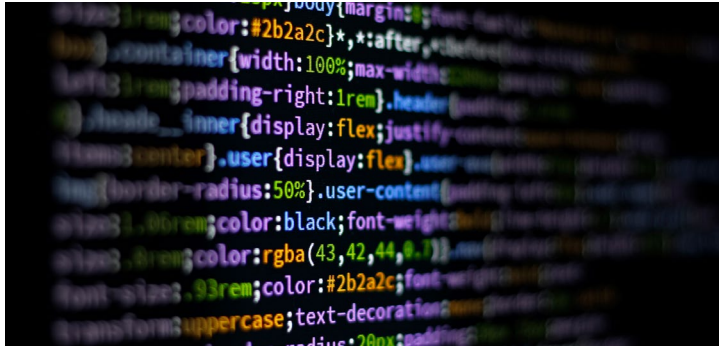
UX is intended to make sure that exchange happens efficiently.



What Does a (UX) Designer Do?

“UX Design is a commitment to building products with the end user in mind.”

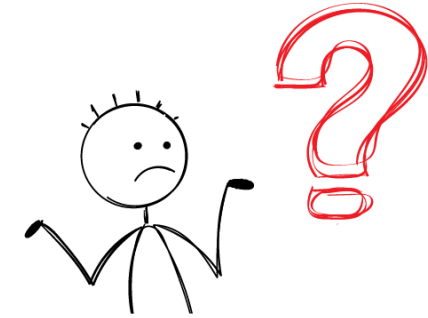
UX Designer



What friends think I do



What my family thinks I do



What clients think I do



What coworkers think I do

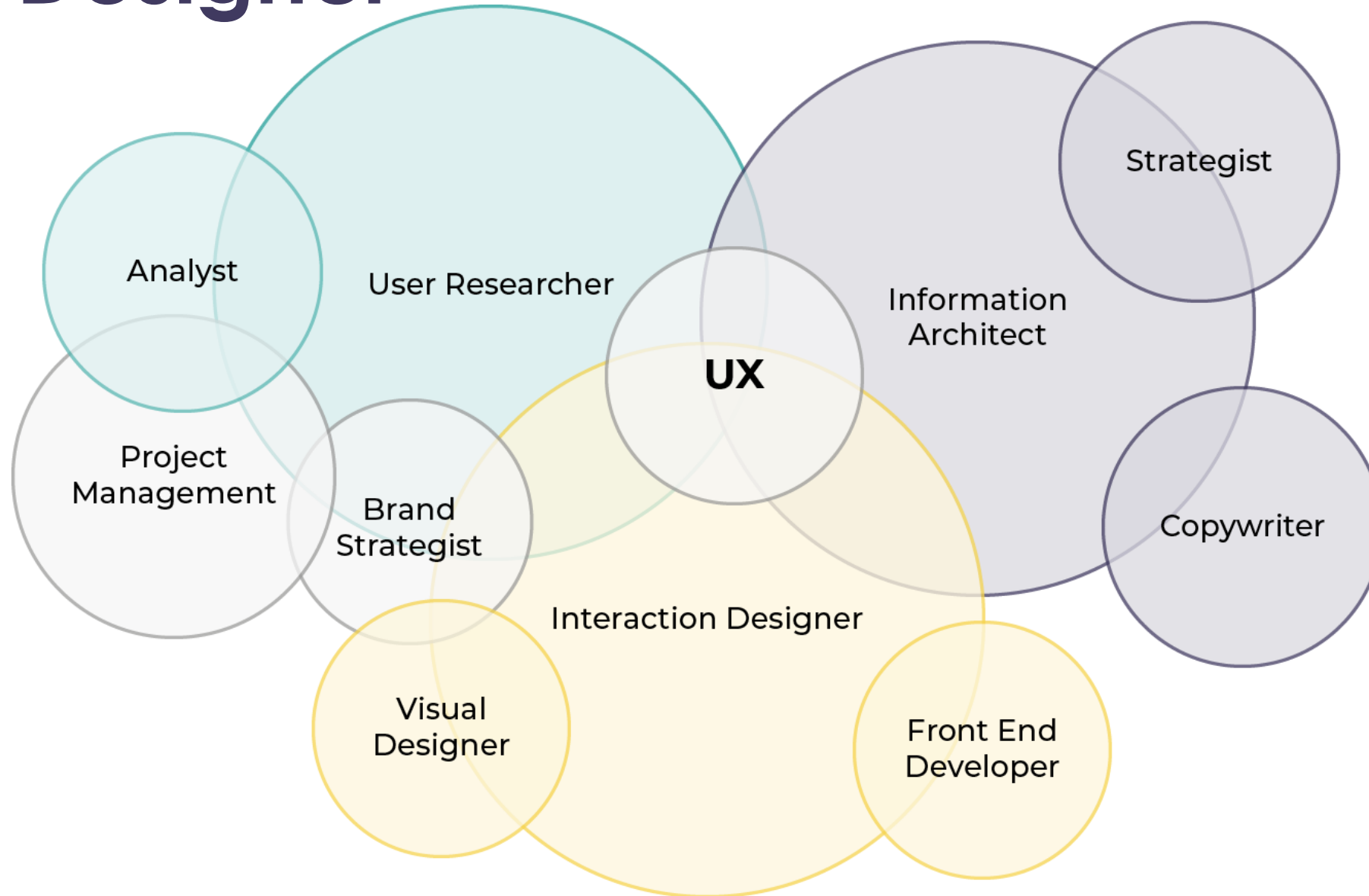


What I think I do



What I actually do

UX Designer



82% of UX professionals
collaborate with other
team members on the
deliverables they produce.

- Nielsen Norman Group

"How UX Professionals Collaborate on Deliverables" (2016)



Why is UX Important?

“FIs that prioritize user experience are more likely to retain customers and attract new ones.”

Key Components of UX:

1. Understanding User Needs & Preferences
2. Outlining Structure
3. Increasing Accessibility
4. Enhancing Efficiency
5. Evolving Security

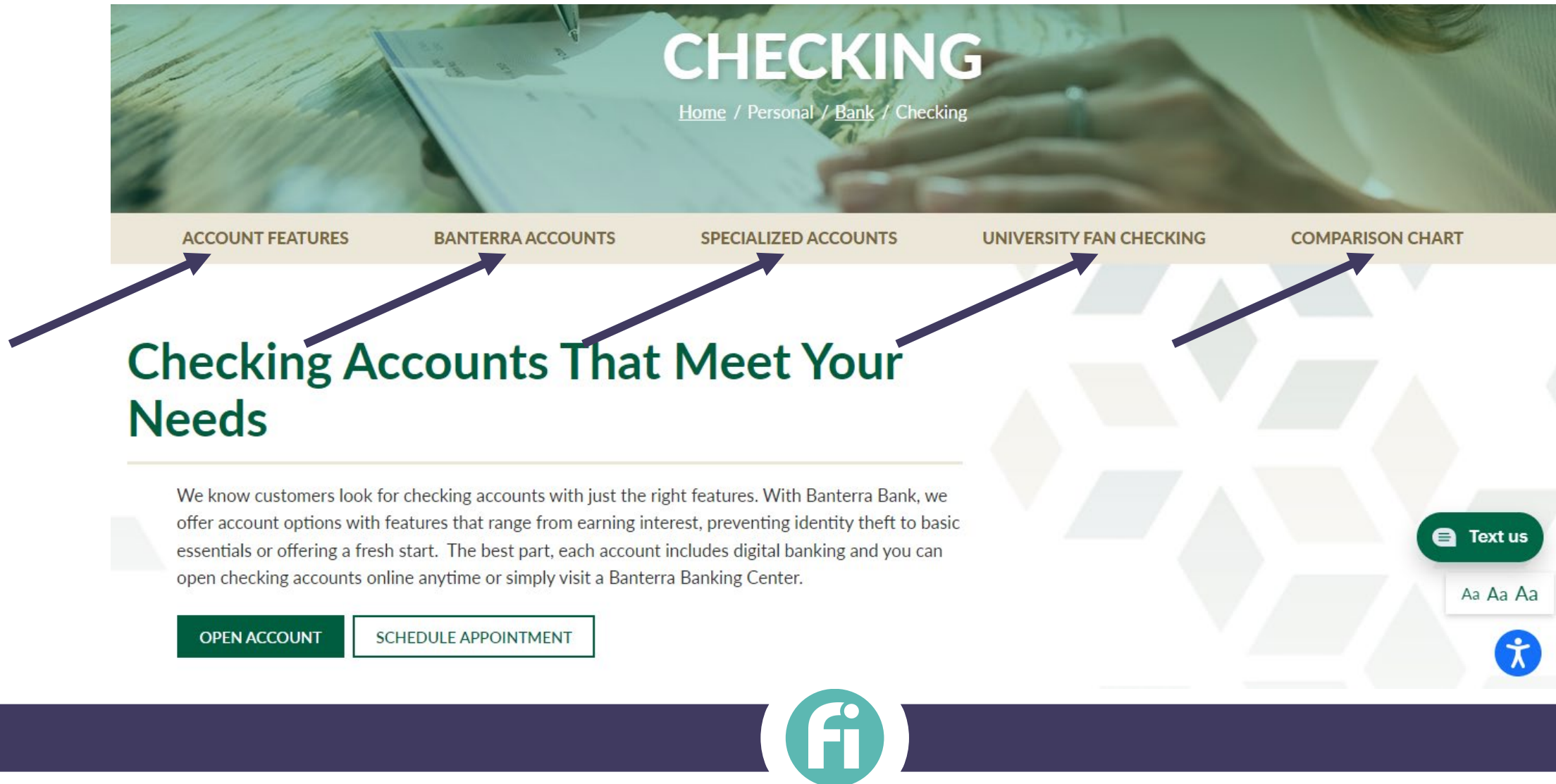




How to Get Started ...

Web Updates for User Experience

Add Text Anchors



Create CTA Buttons

Start Saving Your

Managing your money is about giving every dollar a strategy that works for you is important so you

Contact A Personal Banker

If you already have an account with us and would like to

Switch Your Accounts

Checking Accounts That Meet Your Needs

We know customers look for checking accounts with just the right features. With Banterra Bank we offer account options with features that range from earning interest, preventing identity theft to essentials or offering a fresh start. The best part, each account includes digital banking and you can open checking accounts online anytime or simply visit a Banterra Banking Center.

OPEN ACCOUNT

SCHEDULE APPOINTMENT



Utilize Quick Forms

Full Name *

Phone *

(XXX) XXX-XXXX

Email *

Question/Comments *

☐

I am human



hCaptcha
Privacy - Terms

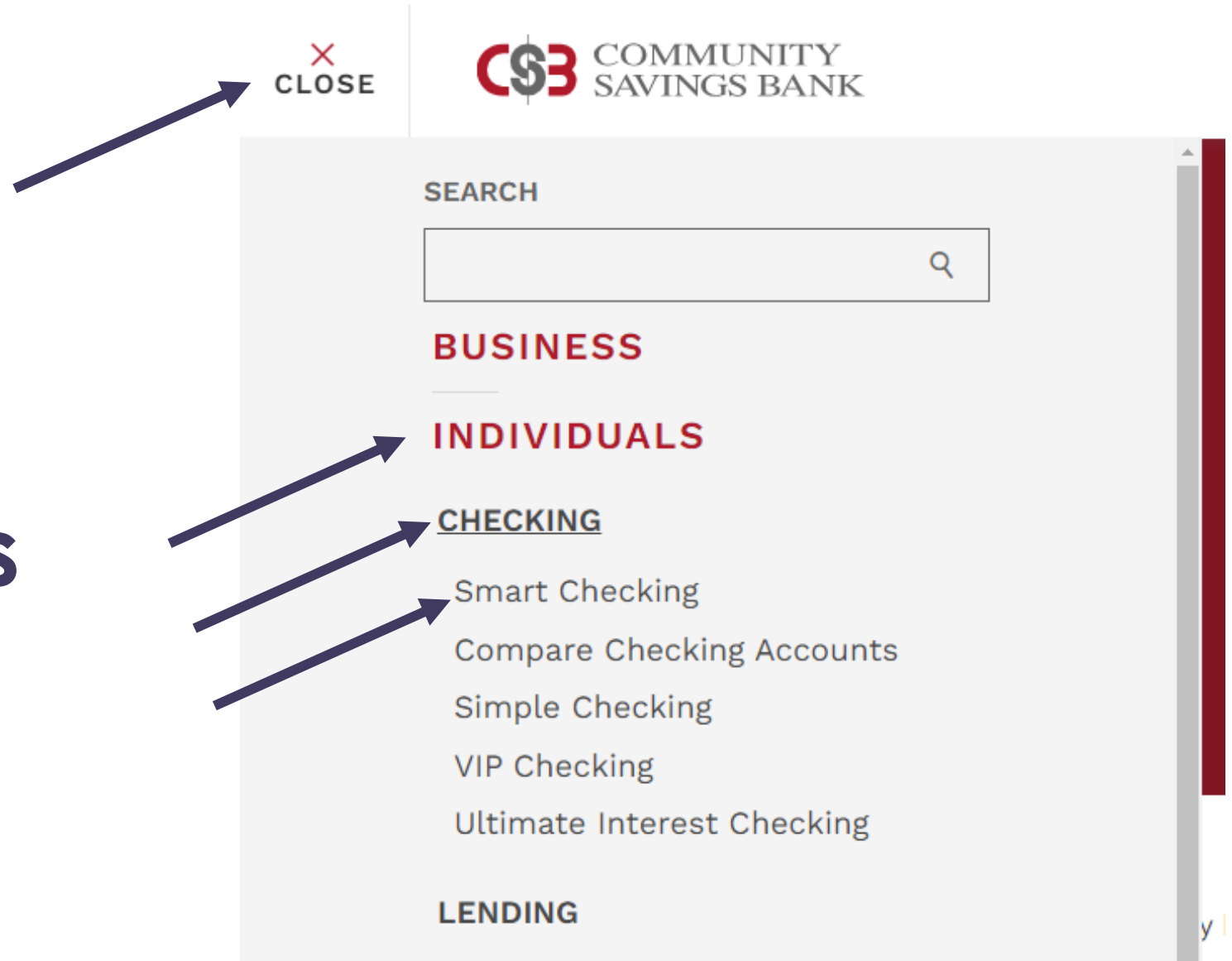
Submit



Lessen Clicks



Lessen Clicks

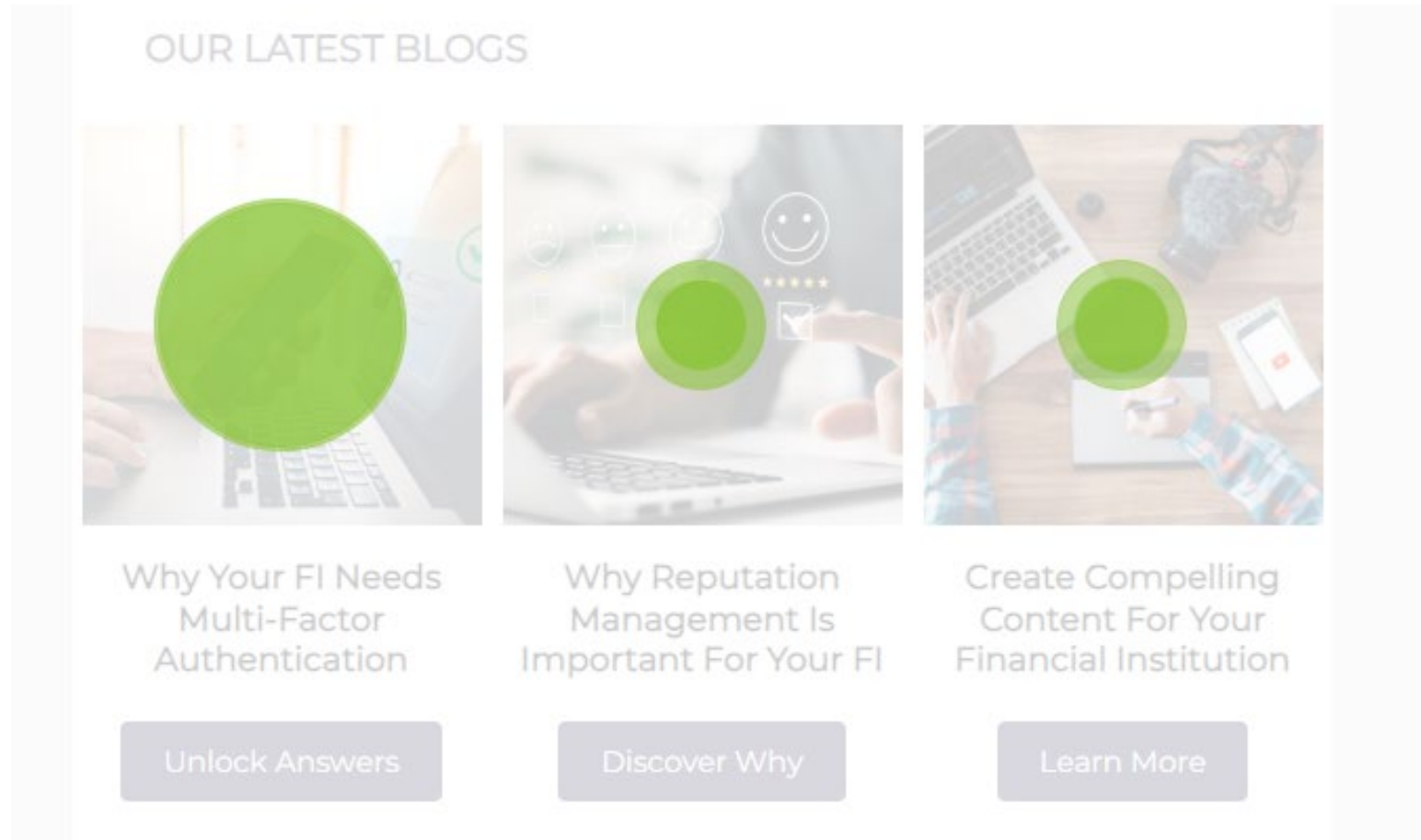


Utilize Comparison Charts

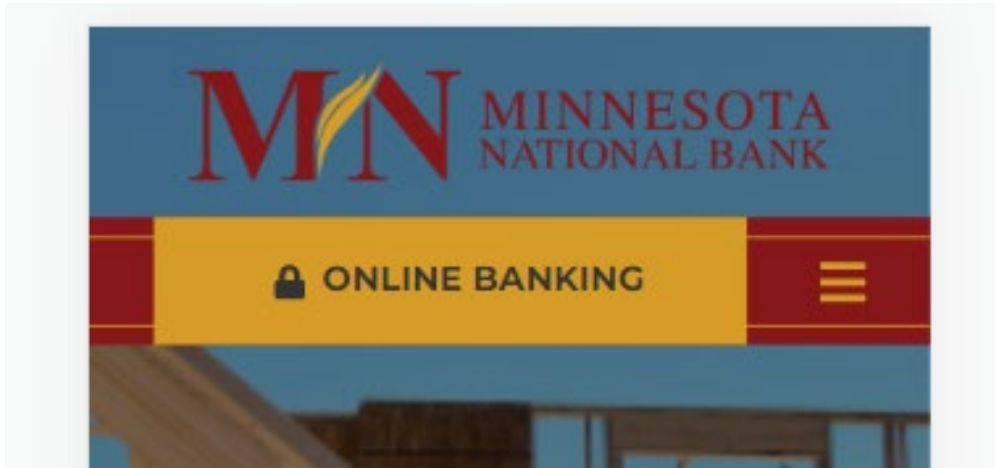
Account Name	Overview	Fee Details	Additional Details
Money Market Insured Savings	<ul style="list-style-type: none">▶ Minimum Deposit to Open - \$0▶ Interest Bearing (Interest is earned on all balances at tiered rate)	<ul style="list-style-type: none">▶ \$1 Service Fee if balance falls below \$50 (Waived if under age 20)	<ul style="list-style-type: none">▶ N/A
Christmas Club	<ul style="list-style-type: none">▶ Minimum Deposit to Open - \$0▶ Interest Bearing (Interest is earned on all balances at tiered rate)	<ul style="list-style-type: none">▶ Service Fee - \$0	<ul style="list-style-type: none">▶ Maximum Balance of \$5,000▶ Funds are not accessible until disbursement date▶ Disbursement Date is around October 10 annually
Certificates of Deposit	<ul style="list-style-type: none">▶ Minimum Deposit to Open - \$500▶ Interest Bearing (Interest is earned at tiered rate)	<ul style="list-style-type: none">▶ Service Fee - \$0▶ Early Withdrawals subject to penalty	<ul style="list-style-type: none">▶ 0.10% Rate bump if you have Premium Checking▶ Terms range from 91 days to 60 months▶ Funds can be withdrawn or reinvested at full maturity▶ Laddering options available for more liquidity and higher return



Make Graphics Clickable



Make Site Mobile-Friendly



Home Loans



Mobile Wallet



Mobile Deposit



Hours & Locations



Web Updates for SEO

- Optimize metadata
- Avoid text on graphics
- Add internal links
- Add keywords to headings
- Create new pages of content
- Eliminate duplicate content
- Update content over time
- Claim social media & directory listings



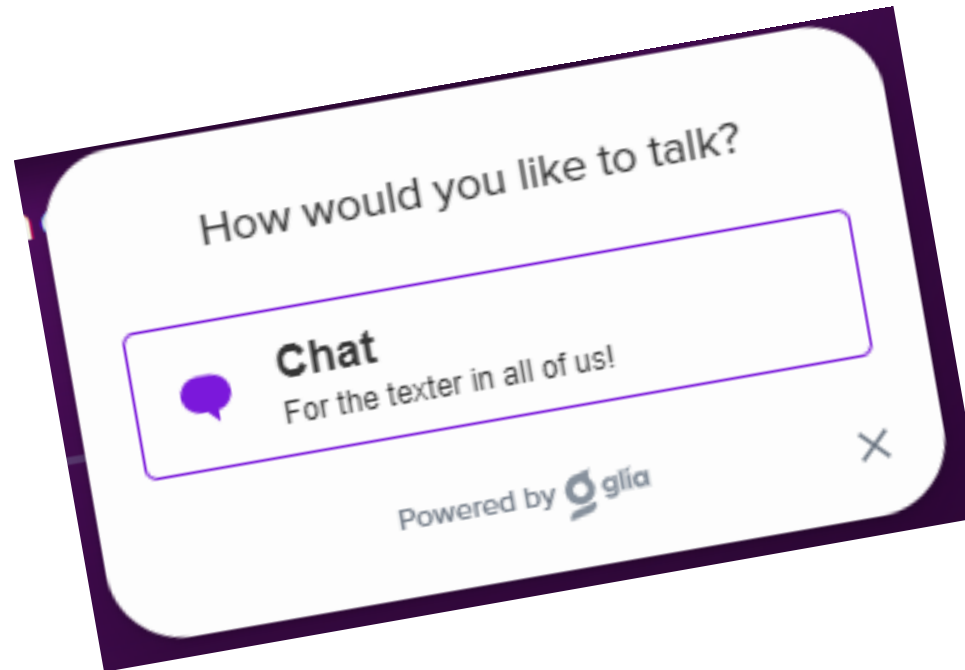


Financial Website Trends

Latest & Upcoming Trends

Chat Integrations

- Podium
- Glia
- POPI/o



MAI

We'll text you.

Enter your information, and our team will text you shortly.

Name*

Mobile Phone*

Message*

By submitting, you authorize The Banterra Virtual Team to send text messages with offers & other information, possibly using automated technology, to the number you provided. Message/data rates apply. Consent is not a condition of purchase. [Use is subject to terms.](#)

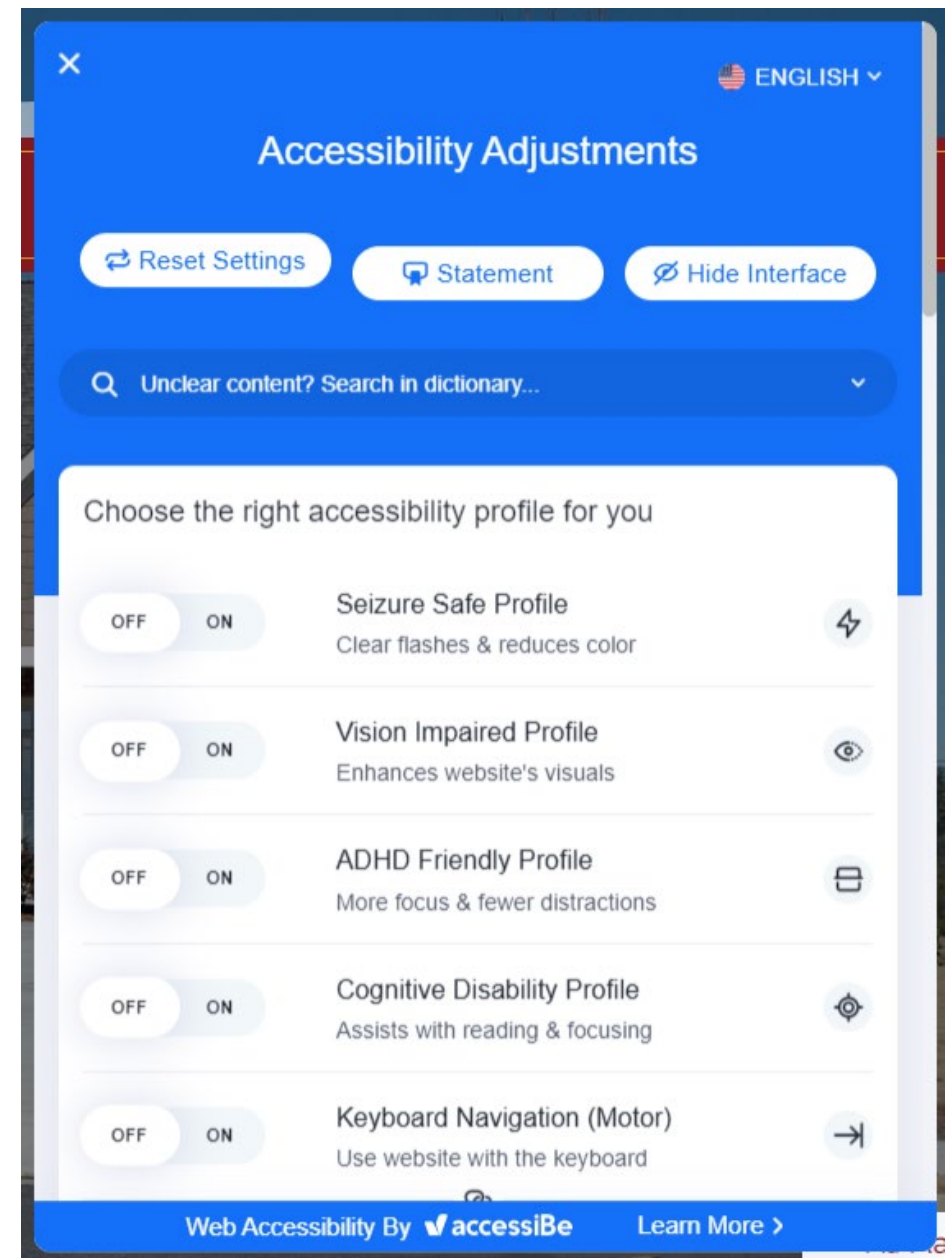
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Ad Ad Ad



WCAG (ADA Accessibility)



Data Privacy

- Comparable to GDPR (General Data Protection Regulation)
- Varies by state
- Cookie consent banner
- Consent logs for advertising & data collection cookies
- Self-service cookie consent opt-out



We use cookies on this site to enhance your user experience.
For a complete overview of all cookies used, please see your [personal settings](#).

Accept



Multi Factor Authentication

Step 1.

Install a verification app on your phone

You'll need to use a verification app such as Google Authenticator, Authy, or Duo.



Step 2.

Scan this QR code with your verification app

Once your app reads the QR code, you'll get a 6-digit code.



Manual Setup

Step 3.

Enter the 6-digit code here

Enter the code from the app below. Once connected, we'll remember your phone so you can use it each time you log in.

6-digit code

#####

Connect Phone



Summary

1. Remember what the “U” stands for.... (hint: it’s not YOU!)
2. Your user’s experience is a differentiator (good or bad)
3. UX design isn’t a one-person job/one-size-fits all
4. The UX must evolve as your information, competition, products and users evolve



Questions?

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- Digital Marketing
- Brand Development
- Print Marketing



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