



DESIGN FOR CHANGE

FINANCIAL WELLBEING

mad★pow

A Tech Mahindra Company

Mad★Pow leverages strategic design and the psychology of motivation to create innovative experiences and compelling digital solutions that are good for people and good for business.



OUR FOCUS

EXPERIENCE INNOVATION

We align business strategy with experience strategy by creating a path that puts empathy and the understanding of human behaviors at the core of our clients' operations. Our human-centered design activities identify what motivates people, what they desire, and what should happen next in their journey with our clients' products or services. These insights fuel creative, design-thinking approaches that allow us to collectively envision new and exciting experiences.

BEHAVIOR CHANGE

We leverage an in-depth understanding of the psychology of motivation to help people achieve greater health and wellness while also producing positive business results for our clients. We identify target behaviors for change, uncover their underlying modifiable determinants, and draw on techniques best suited to shift behaviors into new patterns.

DIGITAL SOLUTIONS

We design and build scalable, beautiful, usable, and accessible digital solutions that deliver seamless and compelling experiences while producing measurable results. The digital solutions we create deliver engagement, build trust, are clear and understandable, extend brands and their personalities, are helpful, and empowering.

We are a purpose-driven,
strategic design consultancy.

We collaborate with our clients to solve
real world problems that affect people's
lives. Our aim is to work on projects that
deliver social impact while providing
financial return for our clients.



WE ARE A TEAM OF 80+
PASSIONATE AND EXPERIENCED:

Behavior Change Experts

Creative Thinkers

Designers

Researchers

Strategists

Technologists



We believe in the power of design and are dedicated to sharing our insights to strengthen the impact and growth of design within the business world, especially within the health and finance sectors. We are the pioneers and teachers of new design thinking methodologies. We help our clients and the professional community move in new and positive directions.

A MAD*POW PURPOSE

FINANCIAL WELLBEING

Now is the time for leaders and change makers across financial services to create compelling digital solutions and innovative experiences that produce behavior change, achieve financial wellbeing and drive business results.

Bankruptcy, debt, and diminishing retirement savings are urgent concerns that many consumers face and underserved populations struggle living paycheck to paycheck, not being able to afford the necessities of life. This all presents an opportunity for savvy financial organizations. Wise and nimble digital choices will reward companies that evolve beyond quarterly profits and begin arming consumers for financial health, and truly supporting them in the transition.

At Mad*Pow, we see these challenges in the financial services industry as an opportunity to improve the experiences people have with financial systems; making people's lives better through design. We're also strong believers that purposeful design will deliver true financial wellbeing to consumers and families, helping them achieve their financial goals, while also delivering great business results.

SAMPLE CLIENTS

STATE STREET GLOBAL
ADVISORS

John Hancock

cfpb

 Liberty
Mutual

 Putnam
INVESTMENTS

 Vanguard

SERVICES

Research & Testing

Experience Strategy & Service Design

Experience Design

Behavior Change Design

Content Strategy

Data Science & Analytics

Mobile App and Web Development

Design Transformation

Helping Military Personnel Achieve Financial Wellbeing



CLIENT

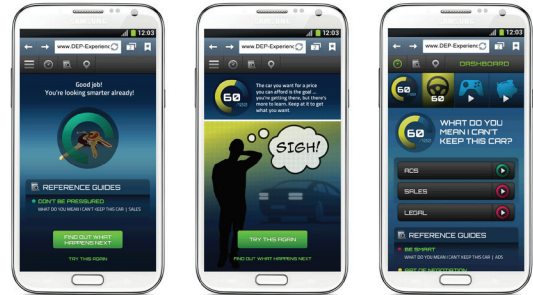
The Consumer Financial Protection Bureau (CFPB) is a U.S. government agency that makes sure banks, lenders, and other financial companies treat people fairly.

CHALLENGE

The Consumer Financial Protection Bureau wanted to safeguard US Armed Forces from financial harm by creating an immersive, digital, and educational game that would coach recruits.

SOLUTION

We created a digital intervention to prepare and arm recruits with the skills they need to protect & manage their personal finances. Our team developed a mobile application combining scenario simulations, behavior change techniques, gamification and financial tools to engage and help recruits learn how to make good consumer choices and avoid bad deals by building their financial muscles and exercising a lifetime of financial fitness.





Tuning a New Website Launch

CLIENT

State Street Global Advisors (SSGA) works in the highly regulated, fast-moving world of institutional finance and is constantly competing for the attention of their constituency.

CHALLENGE

SSGA had recently launched their flagship SSGA.com website on a new publishing platform. And while they accomplished a lot of key objectives with the new release, it was clear the website architecture could be further improved to serve user needs.

SOLUTION

We spent the formative phase of the project meeting with stakeholders throughout the organization to validate alignment and drive consensus around the website's key functions. We also spent time with SSGA prospects and clients to get a better understanding of their needs. A site strategy was then developed that was focused on accomplishing top tasks and providing sought-after content. Our designs were on-standard and validated with users, and we worked closely with SSGA technologists to create a framework for code delivery that minimized impact.



**FORTUNE 100
RETAIL CORPORATION**

So you want to create a household budget?

Believe it or not, budgets are not that complicated.

And making one is as easy as understanding how much money you make and how much money you spend. So, grab a piece of paper and a pen or fire up your favorite spreadsheet program, and let's get started.



So you want to create a household budget?



Empowering Low-Wage and Economically Vulnerable Workers with Financial Wellbeing Interventions

CLIENT

One of the world's largest retail employers.

CHALLENGE

Seven out of ten U.S. workers report that financial stress is their most common source of stress, and almost half (48%) report feeling uneasy and financially insecure. This large employer needed a partner that could analyze the current state of employee financial wellbeing, design and implement targeted interventions to empower employees, and evaluate the impact of those solutions.

SOLUTION

Financial wellbeing as a social impact problem continues to gain visibility and thoughtful attention. We collaborated with this client to combine methods and tools from behavioral science and human-centered design in order to pinpoint the root obstacles of financial wellbeing and create meaningful digital solutions. A focus on behavioral research methods allowed us to set benchmarks on the behaviors and outcomes that matter most and systematically improve the reach, usage, efficacy, and ROI of a new meaningful digital solution over time.

Building an Effective Sales Story

CHALLENGE

A leading financial services firm approached Mad*Pow for help with its sales process. The client's sales reps needed a better way to show prospective corporate customers the features and benefits of its online retirement savings system. Using the online system itself during demos was proving problematic: reliable Internet connections weren't always possible at customer locations, and reps were required to go through several administrative screens, which broke the flow of their sales pitch narrative.

SOLUTION

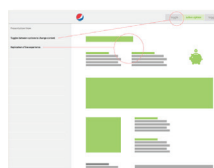
Based on our research, we created a stand-alone demo for workstations and laptops. A series of tabs in the demo help the client's sales reps move easily and quickly through their sales story. The demo is customizable, so sales reps can add customer logos and change customer scenarios – like wealth amounts – to fit their needs. Not only did the stand-alone demo eliminate the need for an Internet connection at the point of presentation, it also afforded additional security measures. Because we populated the demo with simulated data, the sales reps would no longer need to access their back-end systems.



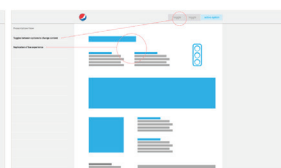
LARGE FINANCIAL SERVICES COMPANY



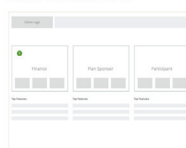
PRESENTATION VIEW



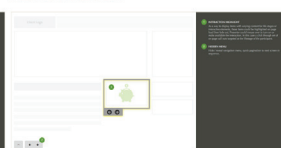
PRESENTATION VIEW SWITCH



PRESENTATION VIEW - SOFT LANDING PAGE

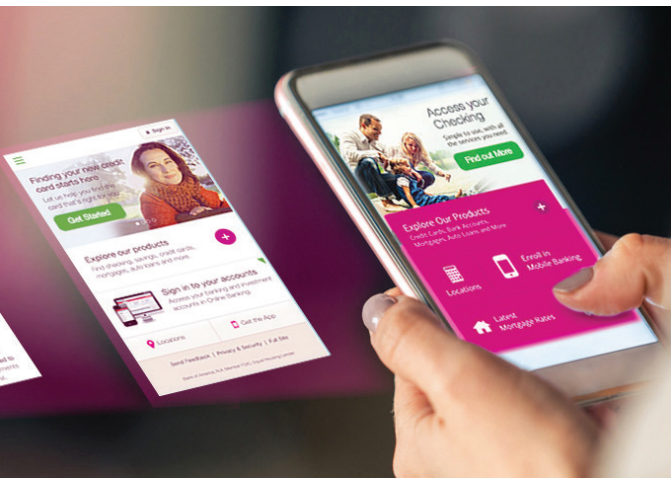


PRESENTATION VIEW - PAGE HIGHLIGHT





**FORTUNE 100
BANKING INSTITUTION**



Designing a Better Mobile Banking Experience

CHALLENGE

One of the world's largest banking institution embarked on a comprehensive redesign of all their mobile offerings.

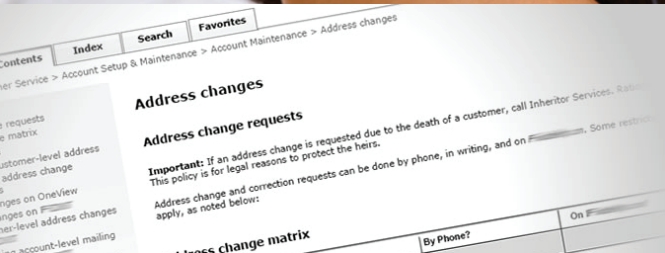
SOLUTION

Our project team became an extension of their large, highly dynamic internal team by embedding ourselves within daily scrums and project meetings over the phone and in person.

Our primary task in supporting the client's effort was centered on the redesign of their mobile-optimized website. Fitting seamlessly into an agile project model, the project team provided initial user-centered wireframe sketches that explored multiple design starting points. From there, the team imagined an extensive visual design overhaul, based on a new internal branding effort. This led to a large amount of color, type and layout treatments that were quickly and efficiently iterated down to a few design directions from which they created prototypes that the client team used for user testing. The user experience, strategic consulting, design concepts and creative direction led directly to a more usable, brand appropriate, mobile-optimized corporate website, available on mobile phones, to any prospective or current large banking institution customer.



LARGE FINANCIAL SERVICES COMPANY



Designing an Effective Call Center Experience to Reduce Costs

CHALLENGE

A large financial services company needed to design an effective interface for their call center associates. When a customer calls their call center, the associate uses this website to pinpoint the exact, and sometimes very detailed information that a customer is seeking.

SOLUTION

The contextual inquiry that the project team conducted during the research phase of this project exposed the need for different methods of navigation depending on the situation. Since the interface needed to train as well as inform, and because the nature of calls is often dependent on current events or particular market conditions (e.g. tax season), the newly designed interface now bubbles up the most relevant timely, popular content items. When the new design was rolled out to thousands of call center employees, the transition was met without a single complaint. Users commented on the improved navigation, contextually relevant information display, and visual design -- an effectively demonstrated best-in-industry approach.

We are an **energetic team** that is passionate about designing **innovative** and **compelling** experiences that **empower change** and provide **value** to the **people** who experience them. Our dedication

to improving finance **experiences** at every touch has given us the opportunity to be part of a positive, **forward-thinking** movement, to improve financial wellbeing through **design.**



“The changing nature of money and emergence of the digital channel are driving a financial services revolution. Companies are conceiving new ways of interacting with people. Artificial Intelligence and Behavior Change Science, will fundamentally change our interactions with Financial companies and the flow of global investments. And today, families and businesses rely on Financial Services more than ever.”



Michael Kirkpatrick

SVP, Client Experience & Strategy

Chair, Financial Experience Design Conference

Mike is part of the leadership team here at the Mad*Pow, and is responsible for building and steering key relationships. Mike is responsible for our overall client services approach, actively designing the best possible experience for our clients. In his time at Mad*Pow, Mike has contributed strategic direction and leadership to a variety of initiatives across the account base and the agency. Mike also heads up Mad*Pow's established Financial Wellbeing practice, designed to make an impact on the lives of the financially underserved and driving for financial inclusion. Over the past 20 years, Michael has held leadership positions in the agency, management consulting and financial services industries. Mike has worked with a variety of clients, including: Prudential, State Street Global Advisors, and USAA.

Amy Cueva

Founder,
Chief Experience Officer,
Health Principal



Amy believes that design can help improve the human condition. She evangelizes the benefits of human-centered design and experience innovation and advocates for the voice of the customer across the industry and around the world. Amy plays an essential role in the pursuit of Mad*Pow's mission of improving people's financial wellbeing and driving change in the financial services sector. Amy has grown Mad*Pow's presence, client base, and revenue, leading to Mad*Pow's 2009 recognition as one of Inc. 500's fastest growing privately held companies. In 2014, Amy was acknowledged as one of Boston's "40 Under 40" by the Boston Business Journal, and she supports An Orphan's Dream, a home for AIDS-orphaned children in Gachoka, Kenya.'



Will Powley

Founder,
Chief Creative Officer

Will created Mad*Pow in 2000 with the goal of building a creative team that can offer value to large organizations by delivering high quality design and extraordinary client service at a competitive price. As a leader within the organization, Will believes the success of Mad*Pow is dependent upon the collective energy and intelligence of the staff. Thus he strives to create a work environment and culture where motivated staff can flourish and succeed to their highest potential. Will's current focus is to unfurl the collective creativity of the organization by pushing team members to exceed client expectations so that clients become advocates that not only partner with Mad*Pow, but refer us to their colleagues and friends.



Adam Connor

VP, Design Transformation

Adam is obsessed with the creative process, the craft of design, and understanding how to make both work effectively within groups. By examining and adjusting the ways staff interact and communicate with one-another, Adam and his team help organizations mature to become more collaborative, innovative, and human-centric.



Jonathan Podolsky

VP, Strategy & Service Design

Jonathan has an extensive background in creating innovative experiences for major retailers, hospitality companies and healthcare providers. An architect by training, he helps clients design service ecosystems that revolutionize consumer experiences based on brand values and strategic goals.



Marli Mesibov

VP, Content Strategy

Marli Mesibov helps organizations get the right content to the right people, at the right time, in the right places. Her work helps patients, providers, and payers better communicate. Marli is a frequent conference speaker, a former editor of the UX publication UX Booth, and was voted one of MindTouch's Top 25 Content Strategist Influencers in 2016.



Dustin DiTommaso

SVP, Behavior Change Design

Dustin blazes trails with his work, merging motivational psychology, design and technology to help people change their lives. His client portfolio includes partnerships with a range of innovative start-ups, non-profits, government agencies and Fortune 500 companies across domains, including healthcare, financial services, education and social impact.



Olga Elizarova

Behavior Change Director

It was her curiosity that drove Olga to the world of design. She is passionate about improving people's experiences with technology by designing solutions that make a difference and might possibly save lives.



Amy Bucher

Behavior Change Design Director

Amy, has always been fascinated with how things (and especially people) work. Her interest drove her choice to become a psychologist and why she came to apply psychology to behavior change design.

Mad*Pow Research & Testing Lab

AT MAD*POW, WE DESIGN FOR PEOPLE AND THAT STARTS WITH UNDERSTANDING PEOPLE.

Insight into human behavior is the fuel that drives innovation and creative problem solving. As such, studying and understanding target audiences through research is core to everything we do at Mad*Pow. Our research practices help find inspiration for new innovations, develop a deeper understanding of what motivates people, and helps to validate and pivot solutions through the design process.

Mad*Pow's full-service lab in our Boston, MA office includes facilities for mobile testing, participatory design, eye tracking, and other services to ensure rigorous research.



FXD

FINANCIAL EXPERIENCE DESIGN

CONFERENCE BY **mad+poll**

We believe in the power of design to drive much needed change. The annual FXD conference provides a unique learning and networking opportunity to move organizations forward to confront new challenges. A select gathering of 150 executives, experts, visionaries, and progressive thinkers across Insurance, Banking, Wealth Management and Fintech gather for this one-and-a-half day of inspiring presentations, workshops and discussion that will help drive real world change.

Leaders at the intersection of financial services, experience, and innovation come together to share insights, case studies, opportunities, and how they have come up with solutions to challenges we all face.

financialexperiencedesign.com



For more information
about Mad*Pow, contact:



Josh Corringham

EVP, Business Development

Josh is responsible for initiating and growing lasting business relationships with our clients.

He enjoys the relieved look on clients' faces when they realize they've found a creative partner that "gets it."

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