WORLDFIRST ONBOARDING

UX CASE STUDY

MARÍA MALLORQUÍN

ABOUT WORLDFIRST

A number of people consider WorldFirst to be amongst the best foreign exchange brokers. Since it began operations in the UK, this money transfer services company transferred £70 Billion for their customers and has opened offices in Australia, the Netherlands, Hong Kong, Singapore, and Japan. Most WorldFirst reviews recommend its services to:

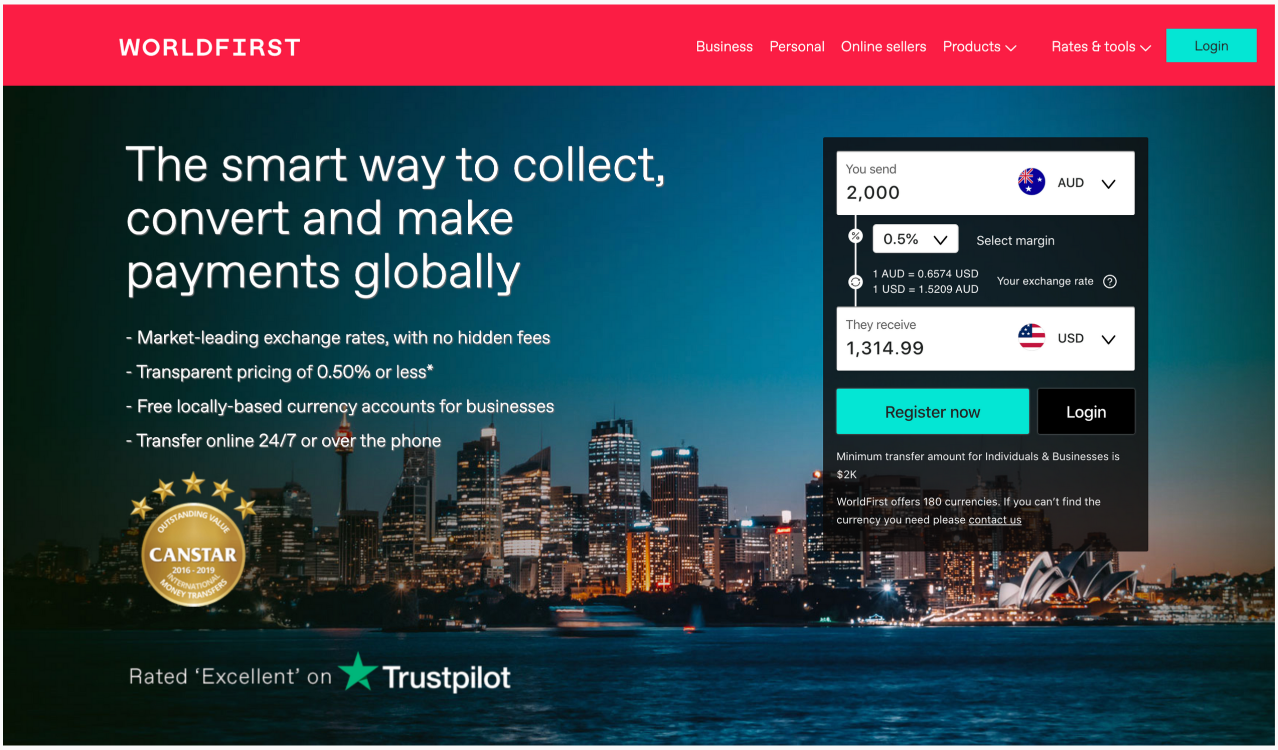
- Individuals who work in foreign countries and want to send money back home
- Individuals who wish to purchase property overseas
- Individuals relocating to different countries
- Overseas students
- Businesses that wish to pay international suppliers or employees
- Online sellers who receive payments in foreign currencies

Currently, more than 400,000 global customers & 150,000 global businesses choose WorldFirst for their international transfers.

ONBOARDING STEP 1

Whether you are a business or an individual, the main value prop is visible at first sight. You can play with the UI and see conversion rate and the final amount of money you get

Before presenting the set of features, they let you try the currency exchange you want to do. The registration button is part of the pattern. No need to navigate the page at all. Note that the browser detects my location and sets the currency to AUD.



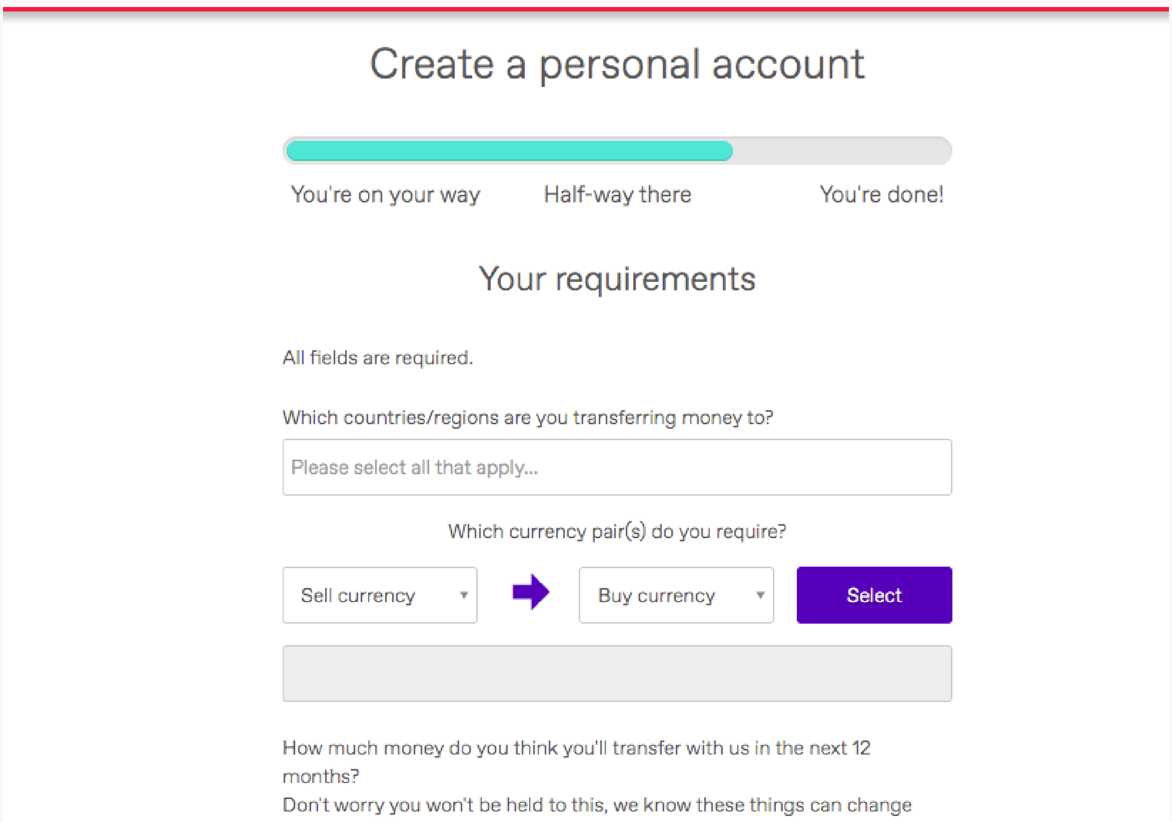
ONBOARDING STEP 1

Localization is increasingly important for businesses who want to expand and offer a tailored experience. Worldfirst provides with a fully localized experience for the following countries:

ONBOARDING STEP 2

International transfers, currency exchange and security are usually synonyms of hazle. They know it and they want to make sure users don't quit the onboarding process too soon.

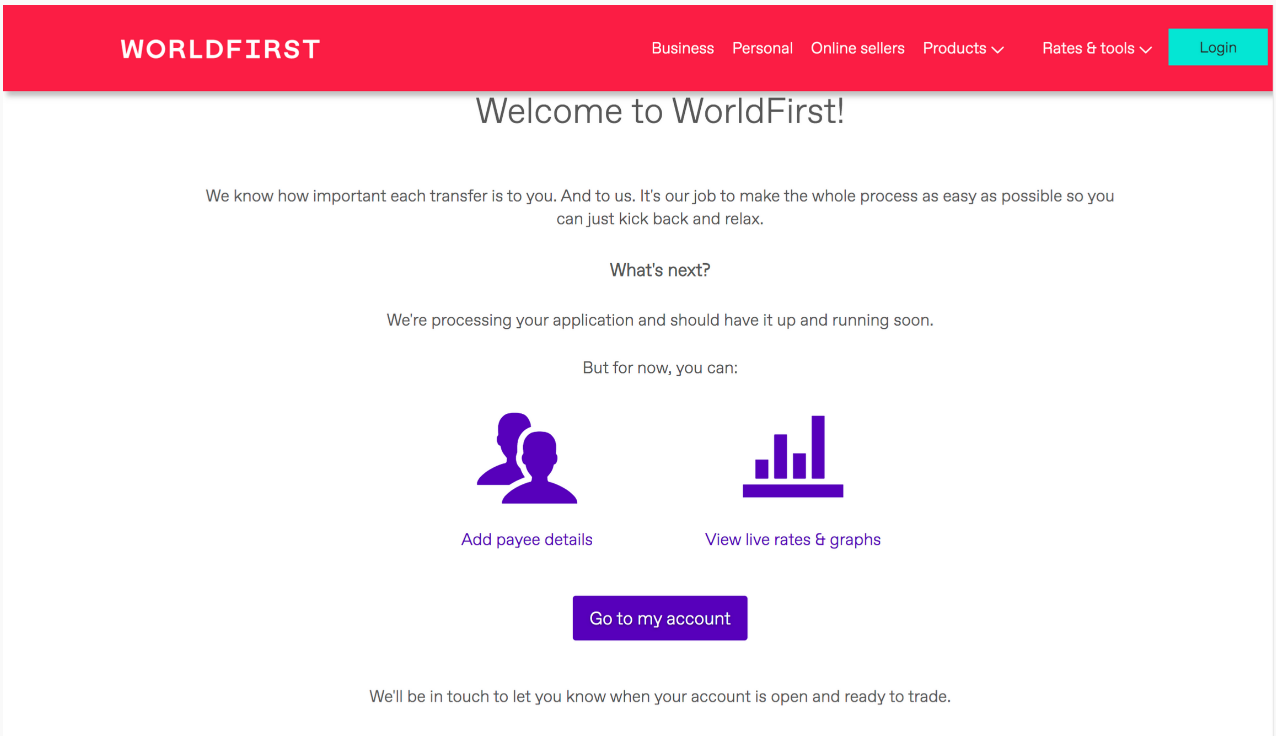
They present you with a progressive onboarding pattern that helps users know how far along the process they are. In general we could say the overal patterns they've chosen during the signup process are clean and clear. The UI is sleek and sturdy. Note the clarity of the messaging they're using.



ONBOARDING STEP 3

Once you finish the signup process, you get a delightful success message the company needs to review your data. Note that:

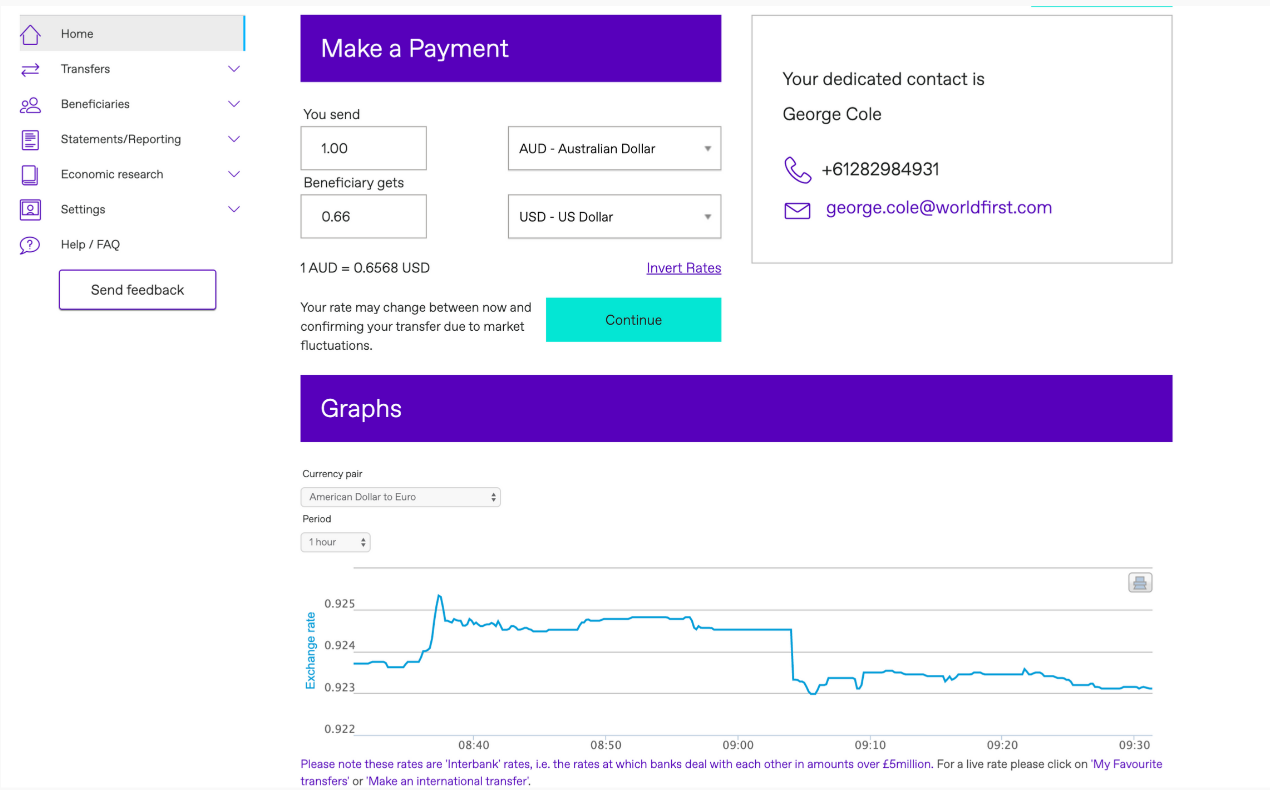
- They don't give you a specific time frame. They just say it will be soon.
- They allow you to enter the platform and play with it even though you can't make actual transactions.
- They give you an option to learn more.
- They use a friendly and consistent voice and tone.



ONBOARDING STEP 4

My account homepage is definitely on point. The UI is super consistent, cohesive and clean.

- Notice how my agent data is very prominent. The feeling that I have an assigned agent makes me feel safe and important. It's reassuring.
- The flow to make transactions is very clear and helps me to avoid making mistakes.
- The graph gives me good out of the box information on the exchange rate data.
- The icons and the words used in the UI help me to navigate fast.



ONBOARDING STEP 5

To my surprise, 3 minutes after I finished the signup, I got a call from a local number. An Australian block calls me to confirm my account details. The first time he called me I couldn't pick up, however, he sent me an email and called me a few hours later. The conversation lasted 1 minute and I was able to operate right away. Very impressive.

Maria,

hank you for registering with World First Foreign Exchange. I tried to give you a call earlier in order to activate your new account, however you
vailable.

e purpose of my call was to introduce myself as your Account Manager here at World First and have a chat about your upcoming foreign exch
quirements. Please find my direct contact details below, and give me a call back at your earliest convenience.

mail: [redacted]@worldfirst.com
irect Tel: +612 [redacted]

ook forward to hearing from you.

nd regards,
eorge

ONBOARDING STEP 6

Transfering money outside your regular bank is a hard step for many people that don't necessarily trust these platforms or the processes they use. This company seems to have agents worldwide and it pays off. The agent that wrote to me had as email footer a picture of The Sydney Opera House and Circular Quay. They know I'm in Australia. It's a subtle way to make you feel protected and "right at home".

Hi Maria,

Thank you for registering with World First Foreign Exchange. I tried to give you a call earlier in order to activate your new account, however you were not available.

The purpose of my call was to introduce myself as your Account Manager here at World First and have a chat about your upcoming foreign exchange requirements. Please find my direct contact details below, and give me a call back at your earliest convenience.

Email: george.cole@worldfirst.com
Direct Tel: +612 8298 4931

I look forward to hearing from you.

Kind regards,
George

SUMMARY

- Exchange rates and percentages can be fuzzy for many. Consider the cognitive load and help users to understand.
- Keep things simple. People like to choose and get started fast. Help users feeling confortable.
- Be consistent. If a user can get a feel for your style and not have to adjust their thinking, it will be easier for them to navigate. If they can quickly navigate your site, they are less likely to bounce.
- Personalize the experience. Localization and agent assignation is important here.
- Give users control by letting them play and safely try.
- UX copy. Words matter and you need to be very clear on the words displayed on a UI. Cognitive load and confusion will be detrimental as a result of a poorly crafted copy.