7 -point checklist to elevate your bank's customer experience

1	**Product information**	☐	Crucial details i.e. eligibility criteria, minimal balance, charges & rates
		☐	Services provided i.e. internet banking, bank statements, debit card/ATM
		☐	Documents needed to open an account
		☐	Exact steps to take to open an account
2	**Information design**	☐	Information should be readily available and intuitive to search for
		☐	Clear call to action (CTA) for customers
3	**Account opening process**	☐	Reducing the number of steps to activate an account
		☐	Enabling a branch appointment system
		☐	Eliminating bunch of documents requirement
4	**Debit card**	☐	Detailed information like card fees + taxes, process of placing a request, activation process and time consumption.
5	**Documents required**	☐	Clear fonts in readable sizes
		☐	Clean website layout
		☐	Fun graphics
		☐	Gamification points throughout the website
6	**Customer support**	☐	Self service mediums e.g. chatbots
		☐	Social media channels e.g. WhatsApp to provide help
7	**The right metrics to track CX success**	☐	Evaluate the abandonment rate against total onboarding attempts
		☐	Measure time required to complete the digital self-service account opening process