

**CONNECTIVE** DX

# Transforming around digital for long-term relevance & growth

**CLIENT**



**SERVICES PROVIDED**

Customer Research & Personas  
Journey Mapping  
Experience Prototype  
Digital Strategy  
Execution Roadmap

**TOOLS USED**

DX7 Competency Assessment  
DX Business Case

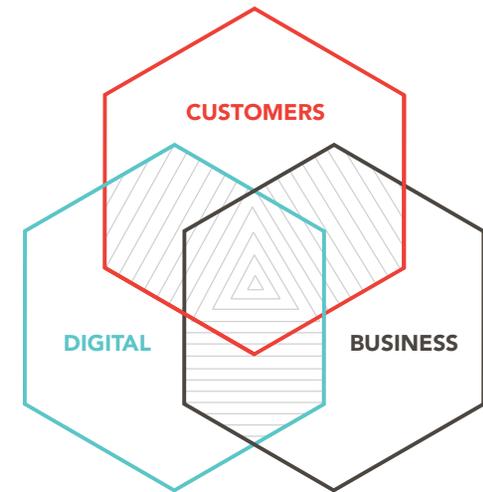
**WORK WITH US**

Let's talk!  
[\(888\) 269-9103](tel:(888)269-9103)

# Redefined competitive landscape creates urgency

Everence is a faith-based, member-owned financial services organization headquartered in Goshen, Indiana, in the heart of Amish Country. With a long heritage of service and stewardship in their core regional markets, Everence enjoys deep loyalty among current customers. But those customers are getting older—and so is the technology they rely on to serve them.

To grow into new markets and remain relevant with young, digital-savvy customers, Everence needed to transform the entire organization around digital. The need for a new website and content management system was a given. But before investing in new technology, they needed to understand what new customers care about and how that aligns to their business goals.



**“You can’t separate digital strategy and business strategy. Digital is incorporated into everything now. I can’t imagine not having it.”**

Julie Hertzler, VP of Innovation and Project Management

## Digital experience strategy focuses on building valuable customer relationships

Using our AIM Digital Experience Framework®, we worked with Julie and other Everence leaders to align around a multi-year vision, imagine the digital experience their customers might enjoy in the future, and create a roadmap for long-term growth and customer lifetime value.

As a faith-based organization, Everence is motivated by more than money. Since their core mission is to cultivate stewardship, they aim to use innovative digital products and services to help customers integrate faith with their finances based on a shared set of values. This will not only deliver better experiences for the people they serve, but also enable Everence to achieve meaningful business outcomes:

- Connect with new customer segments and increase market share
- Cross-sell products and increase the number of services that customers used
- Make member signup and financial transaction experiences easy
- Cultivate stewardship and empower communities to live by their shared values

The digital experience strategy communicates a clear plan for achieving and measuring sustainable digital success, including a phased rollout of key digital experience and innovation programs, as well as a plan to utilize customer data and build agile, high-functioning digital teams.