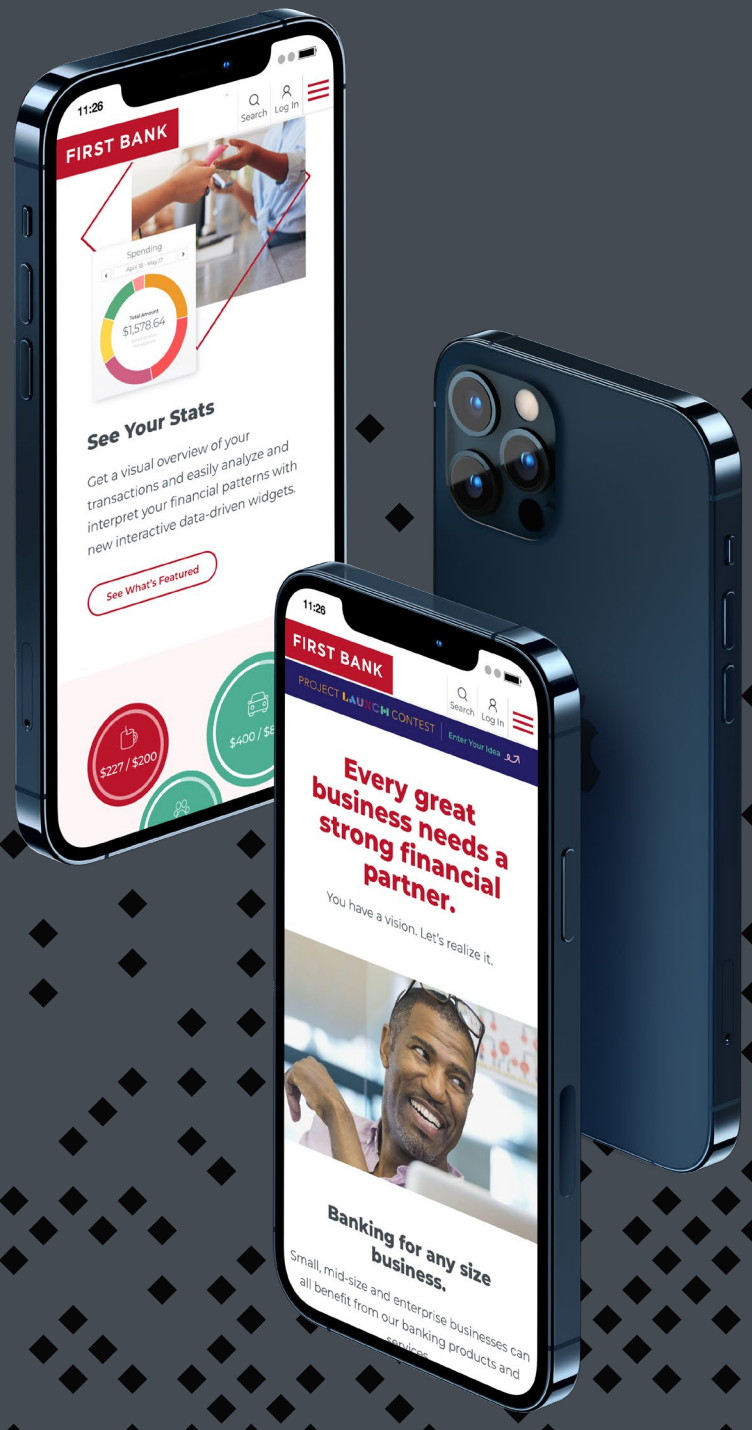
FIRST BANK

First Bank Website Audit



Presented by:
Rivers Agency | August 2022

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Audit Overview

Rivers Agency has prepared this website audit with the goal of establishing current benchmarks, identifying opportunities and challenges, and defining priorities for incremental website improvements. We evaluated key website data, industry research, UI/UX, and custom website tools to identify areas of the site that could benefit from further testing, deeper audits, modifications, and new UI/UX to optimize conversions and better serve business goals.

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General Site Analytics

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Audience Overview

	2020	VS	2021	VS PROJECTED	2022* FIRST 4 MONTHS
Users	1.0 million	↑	1.3 million	↓	4.6K
Pageviews	8.0 million	↑	8.0 million	↑	2.9 million
Unique Pageviews	6.8 million	↑	6.9 million	↑	2.5 million
Sessions Per User	4.93 sessions	↓	3.9 sessions	↑	4.12 sessions
Pages / Session	1.51 pages	↓	1.48 pages	↑	1.53 pages
Average Time On Page	4:59	↓	4:48	↓	4:41
Bounce Rate	34.58%	↓	29.31%	↑	34.07%

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Audience Overview Insights

2021 vs 2020

Total visitors increased 300K

Pages per session and number of sessions saw a slight decrease

Average time on page decreased 3.44%

Bounce rate decreased 5.26%

2022 vs 2021 FIRST 4 MONTHS COMPARISON

Total visitors to the main site has stayed steady

Total visitors across all tracked sites has decreased 12.92%

Pageviews slightly decreased .48%, about 14K

Sessions per user increased 11.27%

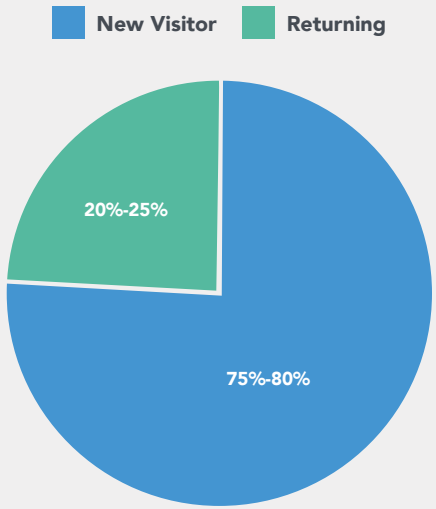
Pages per session increased 2.70%

Average time on page decreased 4.94%

Total number of visitors to the main website has actually increased, however, traffic to the Wealth Answers and Investor sites decreased, accounting for some of the downward trend. How much has branch traffic increased YoY? Insight into this may also explain why total number of visitors is down in 2022 as COVID restrictions have loosened up.

New vs Returning Visitors

YoY new vs returning visitors stays relatively within the same range of about 75-80% new vs 20-25% returning



Section Rankings

1	Locations	**441K pageviews**
2	Learn	**310K pageviews**
3	Personal	**243K pageviews**
4	Digital Banking	**174K pageviews**
5	Business	**94K pageviews**
6	About Us	**84K pageviews**
7	Mortgage	**57K pageviews**

*Numbers extrapolated based on historical data and data from the current year 2022, January through May.

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Top Pages

Top 20 Overall Pages

1.	Logoff	**32.87%**
2.	Homepage	**27.91%**
3.	Online Banking Access	**9.09%**
4.	Select Bank Microsite Lander	**2.10%**
5.	Contact Us	**1.79%**
6.	Locations	**1.32%**
7.	Investor Site - News	**1.17%**
8.	Budgeting 101: Personal Budget Categories Article	**0.90%**
9.	Personal Lander	**0.86%**
10.	Four Different Types of Services | Banking Article	**0.77%**
11.	Investor Site - Annual Reports	**0.63%**
12.	Personal Checking Accounts	**0.62%**
13.	How Much Should You Have In Savings at Age 25? Article	**0.60%**
14.	Investor Site - Presentations	**0.59%**
15.	Digital Banking	**0.54%**
16.	Digital Banking - Enroll	**0.53%**
17.	Business Lander	**0.50%**
18.	Online Money Hacks Article	**0.35%**
19.	Investor Site - Overview	**0.34%**
20.	About Us	**0.32%**

YoY Top Pages generally continue to align with some pages shifting in ranking. The Select Bank microsite does show in the top 4 currently but will drop by end of year. The top 4 pages are consistently the same each year in this order: Logoff, Homepage, Online Banking Access, Contact Us.

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Top Entry & Exit Pages

Top 10 Entry Pages

1.	Homepage	**36.38%**
2.	Logoff	**26.21%**
3.	Online Banking Access	**11.53%**
4.	Select Bank Microsite Lander	**2.48%**
5.	Contact Us	**1.47%**
6.	Investor Site - News	**1.31%**
7.	Budgeting 101: Personal Budget Categories Article	**1.28%**
8.	Four Different Types of Services | Banking Article	**1.01%**
9.	Investor Site - Annual Reports	**0.93%**
10.	How Much Should You Have In Savings at Age 25? Article	**0.88%**

Top 10 Exit Pages

1.	Logoff	**40.99%**
2.	Homepage	**23.92%**
3.	Online Banking Access	**9.07%**
4.	Select Bank Microsite Lander	**1.63%**
5.	Contact Us	**1.59%**
6.	Investor Site - News	**1.30%**
7.	Budgeting 101: Personal Budget Categories Article	**1.26%**
8.	Four Different Types of Services | Banking Article	**0.96%**
9.	Investor Site - Annual Reports	**0.94%**
10.	Investor Site - Presentations	**0.88%**

Top entry and exit pages nearly match up until #10. YoY our top 20 entry and exit pages generally align as well.

Site Traffic Insights

The First Bank site has two distinctly different types of traffic:

Users who are coming to the site just to log in to Online Banking

Users who are coming to the site for information or discovery

Online Banking users typically access just a page or two and almost immediately leave the site to go to Q2, which can skew a lot of the tracking data for time on page, bounce rates, page performance, OLB login event, etc.

Recommend creating segments to better track and understand the activity of information seekers. Implement a third-party source to define user flows and decision-making.

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Tool Usage

Tool Ranking & Usage

		2021 TOTAL EVENTS	2022* TOTAL EVENTS FIRST 4 MONTHS
1	Quiz	6,213	1,158
2	Narrow Down Option Picked	4,311	1,553
3	Homepage Recommended	3,410	975
4	Learn Lander Carousel Used	2,652	927
5	Homepage Services Slider Link Clicked	1,267	403
6	Help You Dropdown Used	1,202	460
7	Trending Topic Slider Clicked	804	312
8	Homepage Learn Section Clicked	442	203
9	Opened Video	773	162
10	Homepage Stories Ad Clicked	268	102
11	Learn Lander Carousel Clicked	180	47

2021 data shows that users interact with the carousels in the Learn section but don't necessarily go much further on a path by clicking. In 2021, of the 2,652 users that used the carousel only 180 clicked, or 6.7% of the users engaged.

Tracked Conversions

		2021 TOTAL EVENTS	2022* TOTAL EVENTS FIRST 4 MONTHS
1	Click to Call	30,867	13,033
2	Online Account Opening	7,999	3,246
3	Directions	6,927	2,740
4	CTA Form	874	341

When available, trends show the site is getting around 30-35 online account opening events per day. Each day this isn't on the site is ~32 clicks to online account opening missed. Based on third-party application analytics, around half of these click events translate to completed applications that are being missed with each down time.

User Search

Top Search Terms

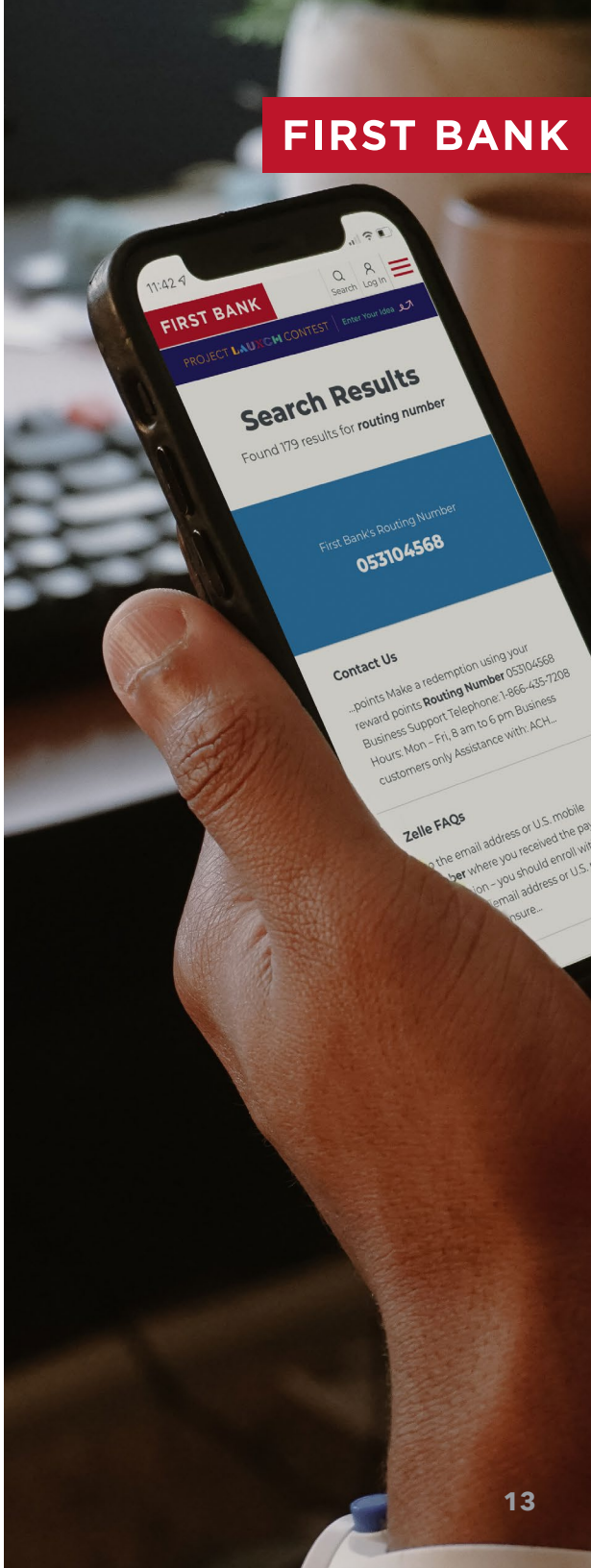
1	Routing Number
2	Zelle
3	Interest Rates
4	Routing
5	Account Number
6	Careers
7	Holiday Hours
8	Account
9	Jobs

Low Results Terms

Interest
Rates
Interest Rates
CD Rates

Terms related to rates have been searched 522 times in 2022.

Tactic:
Create a unified settings area in the backend to manage rates in one place enabling FB to publish accurate rates online.



UTM Tracking

Overall Insights

Overall campaign traffic amounted to 0.6% of the total users to the site.

When comparing users who had campaigns set to those who did not:

Campaign users were 81% new as opposed to 73%

Campaign users had 2.42 pages per session compared to 1.53

Campaign user sessions lasted 3:43 as opposed to 2:27

Campaign users had 63% bounce rate compared to 68%

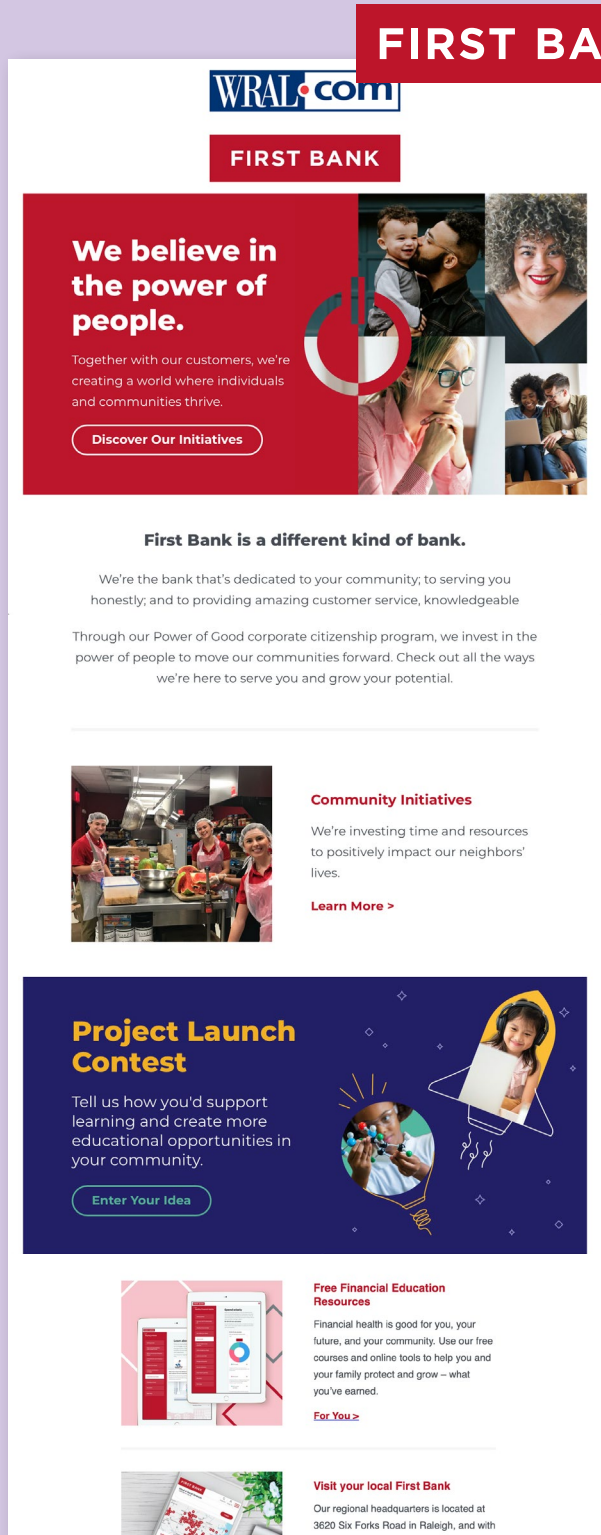
Top Source

1.	WRAL	**22.35%**
2.	Internal Pieces	**20.19%**
3.	June BCC Ads	**9.37%**
4.	WLOS	**9.32%**

Top Medium

1.	email	**30.00%**
2.	banners_ads	**15.00%**
3.	print_ad	**10.00%**
4.	olb	**9.31%**

Create a shared live document for all UTM tracking so that there are no overlapping or similar phrases used.



UTM Tracking

Top Campaigns

1.	Project Launch	**38.73%**
2.	Business Credit Card	**9.28%**
3.	Q1 Power of People	**9.12%**

Project Launch Campaign

Project Launch has the most traffic with 1,431 users and 1,865 sessions. This significantly outperforms any other campaigns to date.

The best source-tracked traffic came from WRAL/banner_ads (as the Source/Medium). That was 38% of the overall users, and 33% of the sessions. Second was TBJ/email with 12% and third was WLOS/homepage_takeover with 11%.

“Contest” and “enter_idea” are by far the biggest content performers at 49% and 44% of users respectively.

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Best Practice Insights

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Customer Experience

Exceptional customer experience (CX) not only enhances brand reputation and impacts company revenues, but also plays a direct role in customer retention and increases in cross-selling and up-selling opportunities.

According to a study conducted by Metrigy, **more than 70% of financial services companies are transforming their CX in 2022**: 39.7% have completed a project or have one in progress and 30.9% are planning for a project by the end of the year.

To gain and retain customers, it is vital for companies in the banking industry to focus on delivering meaningful experiences.

First Bank customer experience has and will continue to be a major priority, but there are ways we can improve the customer experience including:

1. Enhancing Application & Onboarding Experience
2. Creating Channel and Device Agnostic Experiences
3. Implementing AI & Chatbots

81%

of organizations compete mostly, or entirely based on the customer experience (CX).

Gartner

96%

of customers worldwide identify customer service as the deciding factor for brand loyalty.

Microsoft

30%

of customers are willing to shift to BigTechs or Fintechs because of unsatisfactory experiences with their primary bank.

Capgemini

Sources:
Deloitte 2022 Banking And Capital Markets Outlook
PFSK Digital Banking Playbook 2021
Customer Experience Strategies in Banking: What's Trending
6 Top UX CX Trends Across the Banking Industry in 2022

Enhancing Applications & Onboarding

Customer onboarding is one of the most challenging aspects for banks, yet research commissioned by ABBYY shows that it is only ranked as their third most important priority.

Customer onboarding is a key income generator, so a high level of abandonment is a significant lost opportunity for new customer acquisition, retention rates, and revenue. During a webinar, Peter Wannemacher, Principal Analyst at Forrester, stated that **abandonment rates for online banking applications are at an all-time high of 97.5%.**

Additionally, Deloitte research reports at least **38% of customer dropouts during onboarding are due to the cumbersome process.**

Key items to look at: application completion rates, addressing and assessing online application issues, expanding online applications to more products, and potentially assessing application UX for better recommendations.

Sources:
3 Retail Banking Trends the Industry Still Isn't Getting Right
6 Ways Digital Is Transforming the Customer Journey In Banking
2020 Accenture Global Banking Consumer Study

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accenture

44%

Digital sales represented 44% of Bank of America's total customer sales in Q3 2020, up from 29% a year earlier.

63%

63% of BBVA's sales were through digital channels in the first half of June 2020, compared with 57% in the first half of 2019, and 49% in the first half of 2018.

75%

Commerzbank reports that 75% of new customers in Germany opened their account via online channels in Q2 2020.

Channel & Device Agnostic Experiences

Today's customer journey is channel-agnostic. Consumers can start from the website, go to their mobile, chat with a bot, or pick up the phone and talk to a customer representative. Throughout the journey, even if their touchpoint is different, the customer expects the same experience regardless of the channel.

According to a report from CCG Catalyst, consumers at traditional banks are more likely to use a mix of digital and analog channels. The branch is still a viable channel, but banks should take a more aggressive approach to mobile and create device-agnostic experiences if they hope to increase digital adoption rates.

Create the same customer service experience online that customers receive in branch. Audit and test mobile views of the website to optimize and drive users to faster conversions.

Sources:
4 Essential Trends Shaping Banking's Future: How Banks Measure Up
6 Ways Digital Is Transforming the Customer Journey In Banking

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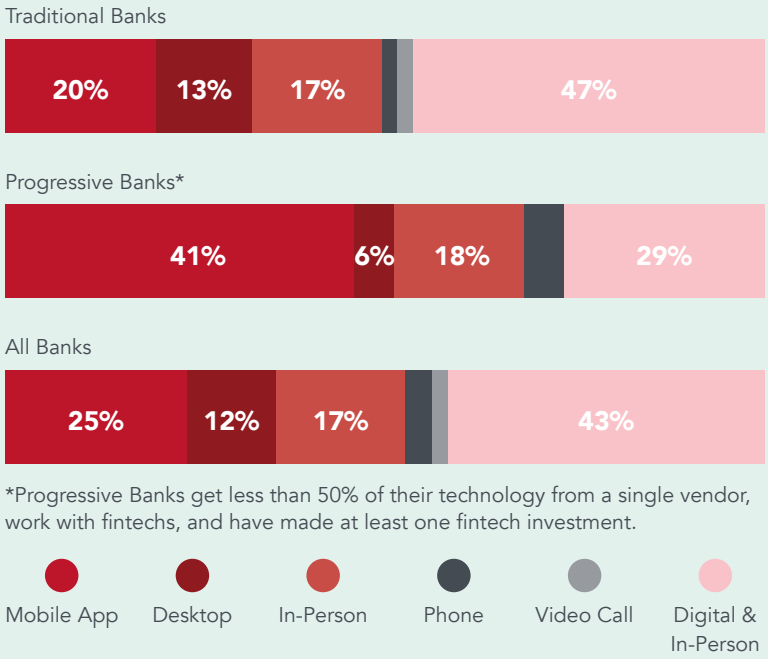
57% of customers would prefer internet banking.

Primary way consumers engage with their banking provider

Survey of senior banking executives



*Progressive Banks get less than 50% of their technology from a single vendor, work with fintechs, and have made at least one fintech investment.

CCG | Fusion of Banking & Fintech
Catalyst Consulting Group

THE FINANCIAL BRAND

AI & Chatbots

Another area that traditional financial institutions are not paying enough attention to, according to CCG Catalyst, is data analytics and artificial intelligence. Forward-thinking banks are using these technologies both to improve the customer experience, drive efficiency, and improve fraud mitigation.

Even before the pandemic, the implementation of artificial intelligence (AI) chatbots was already on the rise. Throughout 2020, customers and members have come to rely on self-service platforms to minimize risks.

Using the advances in AI and machine learning, technologies like chatbots can be upgraded to present relevant offers to consumers and centrally manage requests across channels so that people will have a contextually relevant interaction any time, across devices and interfaces.

In fact, a study by McKinsey shows that **organizations implementing AI-based applications are forecast to increase cash flow 120% by 2030.**

Work to implement a chat bot that will extend the same customer service experience online that customers receive in branch. Eventually through the use of AI and process intelligence tools, use data discovered to help personalize customer experiences and alleviate workload on employees.

Sources:
PFSK Digital Banking Playbook 2021
4 Essential Trends Shaping Banking's Future: How Banks Measure Up
6 Ways Digital Is Transforming the Customer Journey In Banking
Customer Experience Strategies in Banking: What's Trending
3 Retail Banking Trends the Industry Still Isn't Getting Right

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74%

of internet users prefer using chatbots when looking for answers to simple questions.

psfk

The top two technologies financial service firms are investing in as part of their digital transformation efforts are: Software-as-a-service (68%) and AI, machine learning, and cognitive computing (53%).

FORRESTER®

2 IN 5

firms have already installed artificial intelligence software.

1 IN 5

firms plan to install artificial intelligence software.

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Section Reviews

Homepage

Top Interactions

1 Quiz
19-22% of total tool tracking events YoY
2021 events = 6,213 | 2022 events = 1,158

2 Hero
17-19% of total tool tracking events YoY
2021 events = 3,737 | 2022 events = 1,853

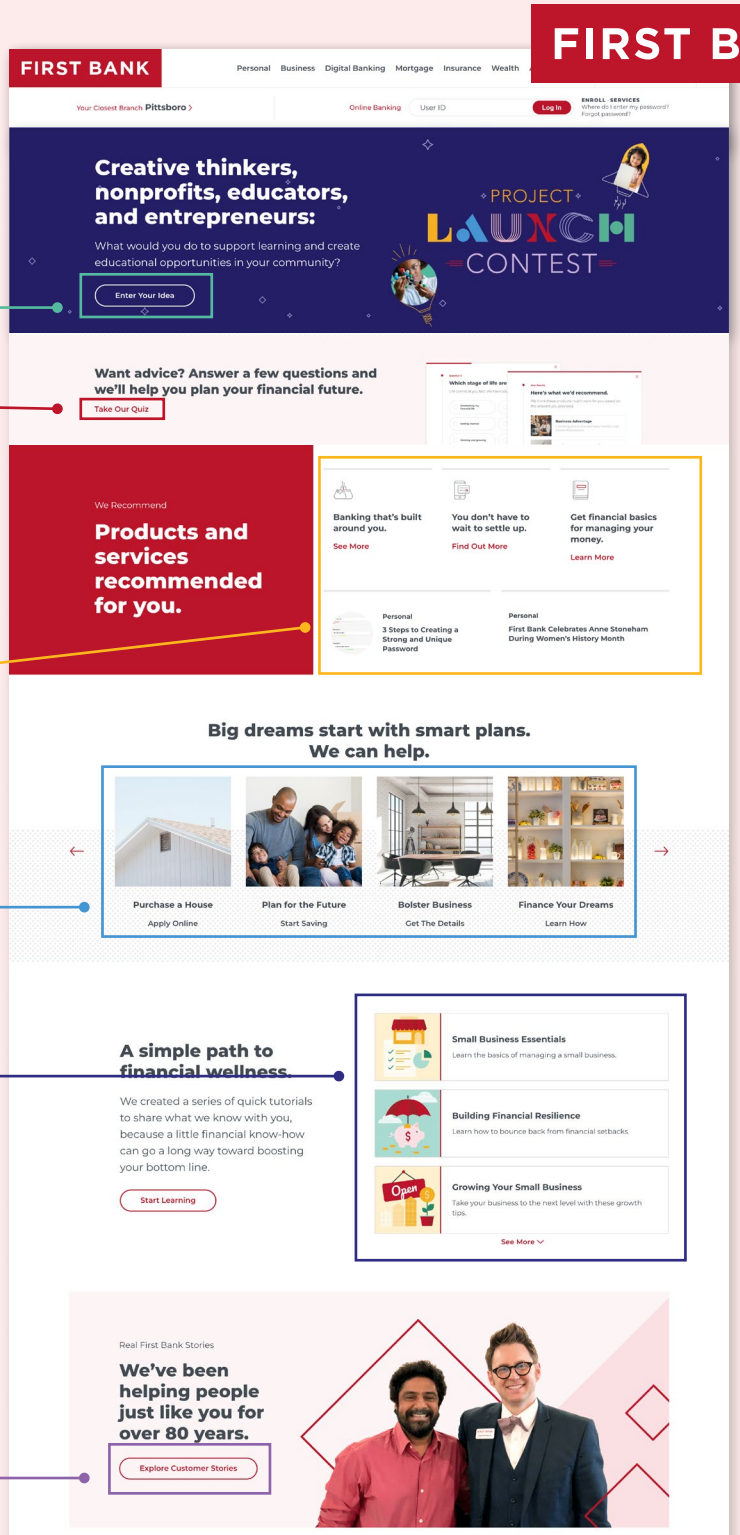
3 Recommended For You
15% of total tool tracking events YoY
2021 events = 3,410 | 2022 events = 975

4 Services Slider
5-6% of total tool tracking events YoY
2021 events = 1,267 | 2022 events = 402

5 Learn Ad
2-3% of total tool tracking events
2021 events = 2,652 | 2022 events = 203

6 Stories Ad
1% of total tool tracking events YoY
2021 events = 268 | 2022 events = 102

*2022 DATA REFLECTS FIRST 4 MONTHS



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Homepage Quiz

2021

Event Action	Total Events	Unique Events
	6,213 % of Total: 0.48% (1,307,738)	4,831 % of Total: 0.43% (1,123,181)
1. Answer Selected	**2,898** (46.64%)	1,756 (36.35%)
2. Advice Quiz Opened	**2,707** (43.57%)	2,512 (52.00%)
3. Results	**355** (5.71%)	324 (6.71%)
4. Result Clicked	**253** (4.07%)	239 (4.95%)

2022 FIRST 4 MONTHS

Event Action	Total Events	Unique Events
	1,158 % of Total: 4.12% (28,080)	724 % of Total: 3.12% (23,201)
1. Answer Selected	**644** (55.61%)	230 (31.77%)
2. Advice Quiz Opened	**443** (38.26%)	424 (58.56%)
3. Results	**43** (3.71%)	42 (5.80%)
4. Result Clicked	**28** (2.42%)	28 (3.87%)

Of the users taking the Quiz, 1/10 go through the whole process to receive results.

Homepage Recommendations

A/B Testing

Implement quarterly A/B testing on the homepage to see if moving or redesigning sections might increase engagement or identify any sections users aren't interested in.

Tool Audits

Recommended For You

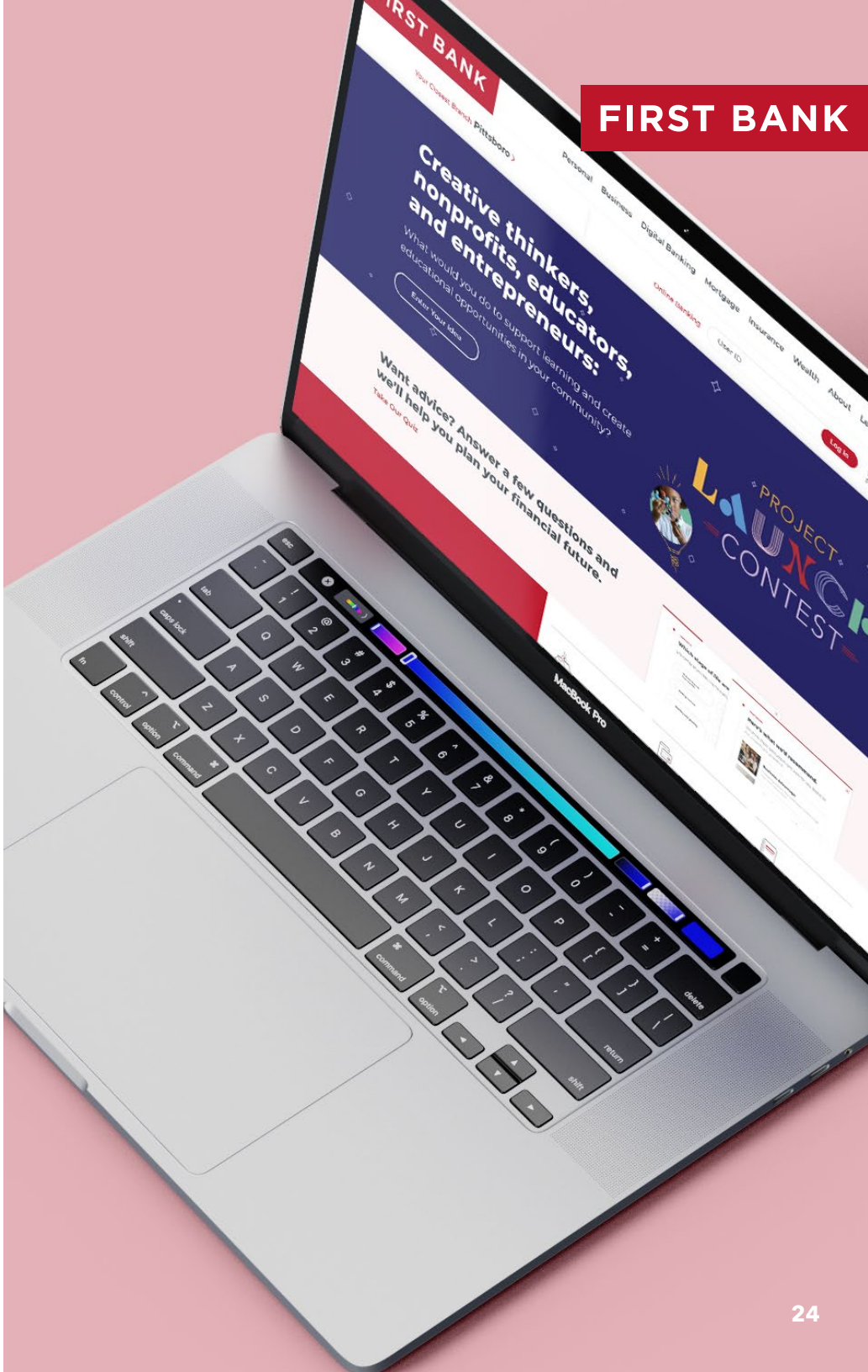
Tool has been infrequently updated since 2018. Do a full audit of scoring and what users are served based on website engagement. Include new services and features.

Quiz

The Quiz has been updated since 2018 and new services were added, however, a full audit could help identify any failures in UI/UX to help boost completion and conversions of the Quiz.

Reflect Targeted Business Goals

Work with First Bank on a quarterly basis to ensure homepage is serving business goals outside of quarterly campaigns.



Logoff Page

Insights

So far in 2022, 81.75% of users are exiting from the Logoff page. For the 18.25% users that go on to another page, these are the most common:

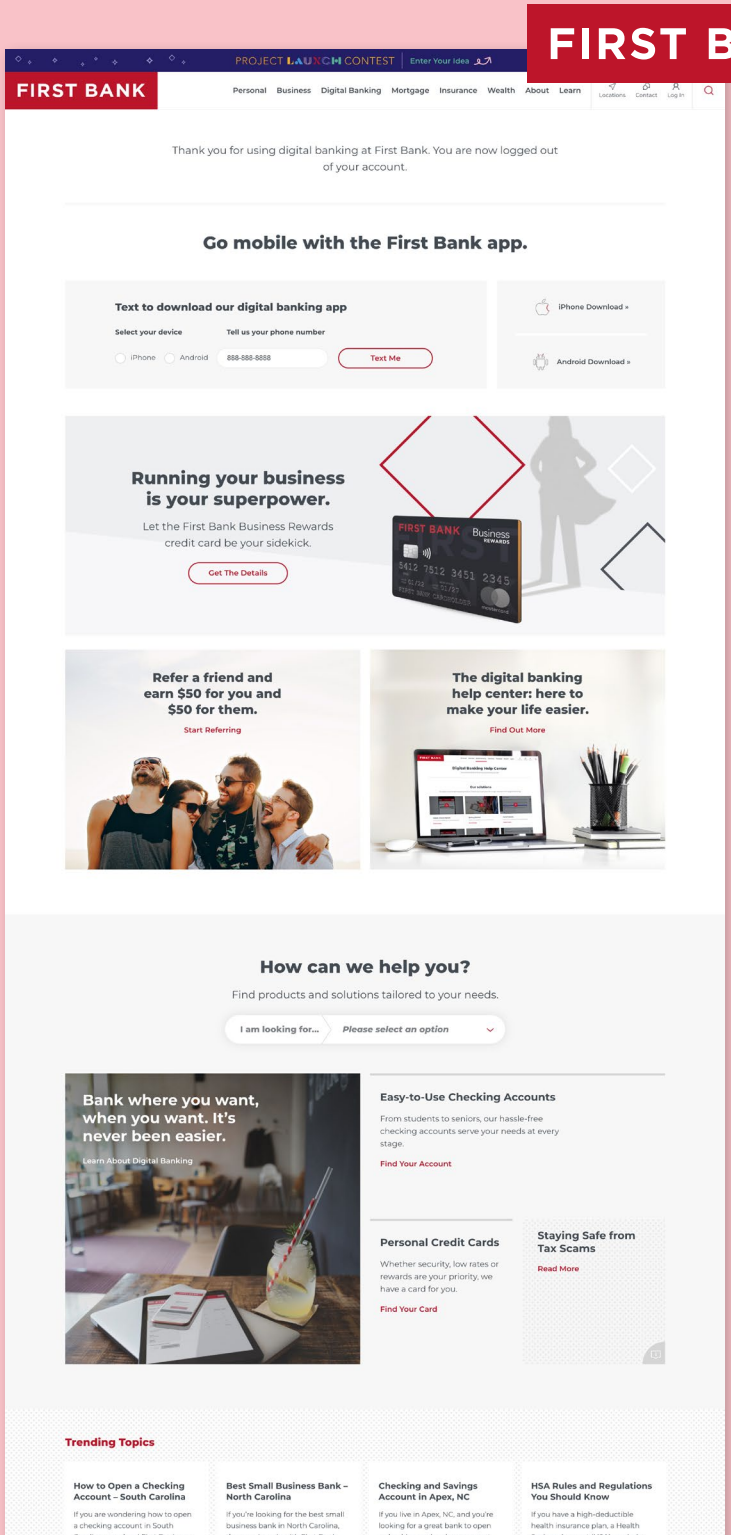
Homepage	**Business Lander**
Online Banking Access	**Digital Banking Lander**
Select Bank	**Locations**
Contact Us	**Project Launch Microsite**
Personal Lander	**Personal - Credit Cards**

The Logoff page is typically updated quarterly with a campaign ad but hasn't seen a full refresh since 2018. A large message and text to download module at the top reduce opportunity to engage and help convert existing users to new services before they quickly exit.

Recommendations

Redesign the Logoff page to capture more people and convert them back into the site.

Implement tracking of the users that scroll to see what they are officially engaging with.



Online Banking Access Page

Insights

Always ranked #3 in top pages across the site YoY.

In auditing, it was discovered that a mix of traffic is being logged in the data that includes internal First Bank IPs. We already implemented a new filter view for data from a new set of internal IP addresses.

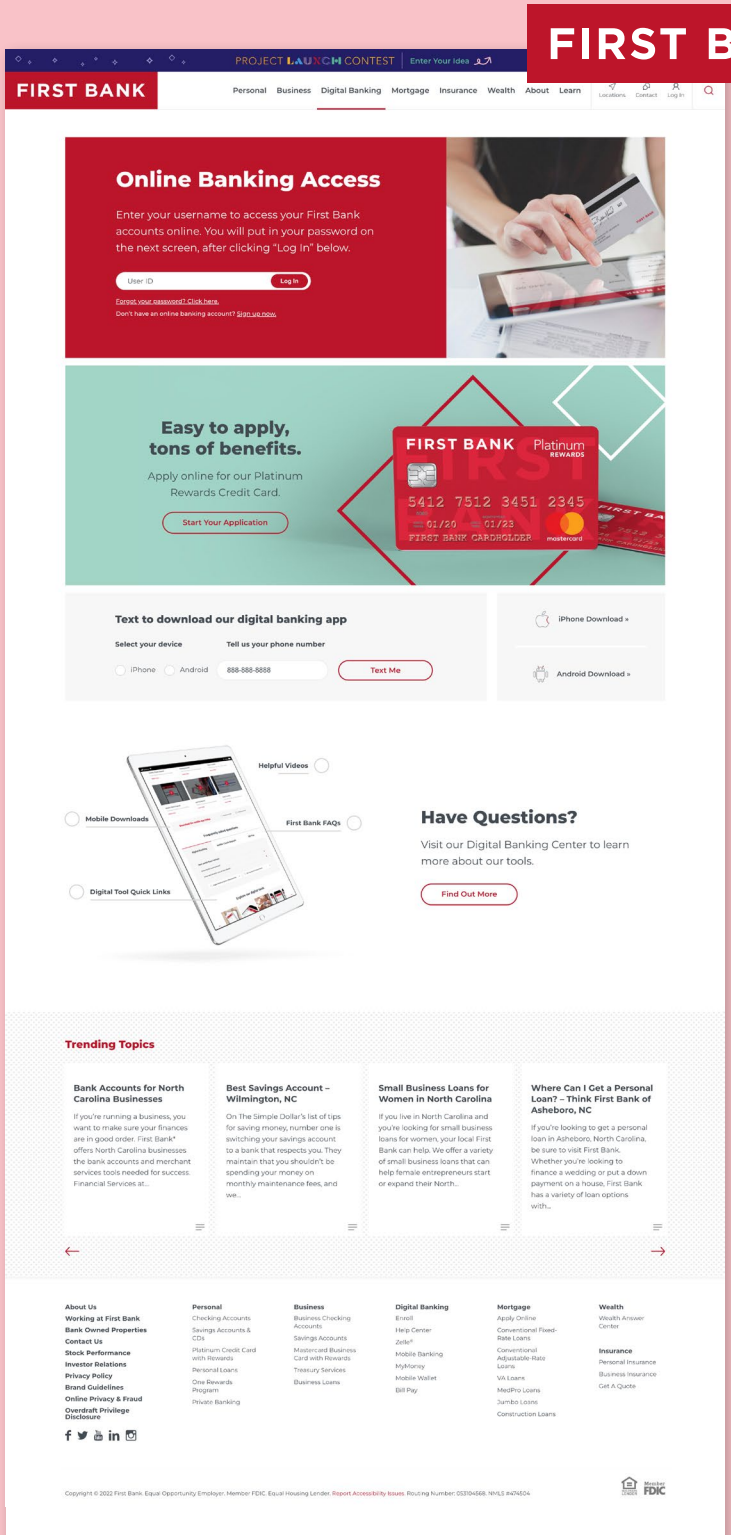
Page has not been redesigned or significantly updated since 2018.

Recommendations

Redesign the login box to reduce valuable conversion space. Update page below the login box and change these ads more frequently to catch users' attention.

Audit new filtered view of traffic once data has accumulated more this year to see if there are better insights into this page and what the users are doing within the page.

Implement tracking of the users that scroll to see what they are officially engaging with.



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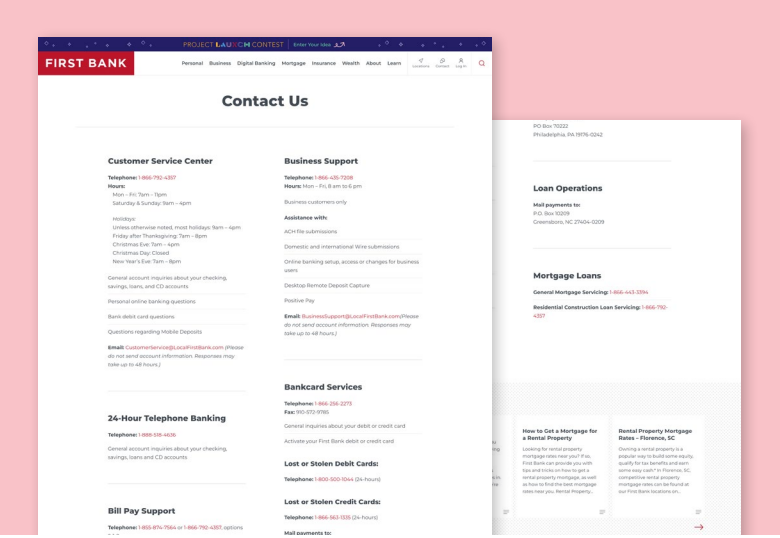
Contact & Locations Pages



Contact

Insights

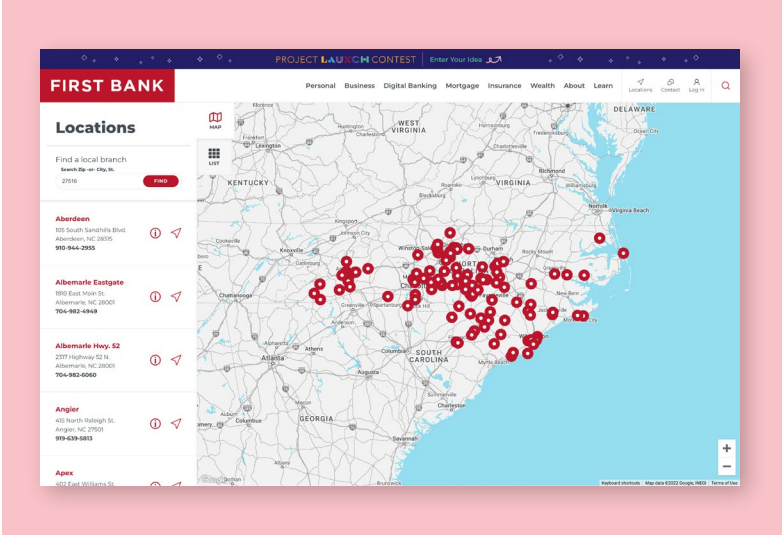
Always ranked #4 in top pages across the site YoY.
Averages about 130K visits per year.

Recommendations

Update page design to be less of a wall of text and guide users quickly and clearly to the information they need.

Add a chatbot.

Add FAQs based on customer data.



Locations

Insights

Typically ranked #5 in top pages across the site YoY.
Averages about 110K visits per year.

Recommendations

Update search functionality to automatically search location if a user has already opted into allowing the browser to do so.

Employ user testing.

Update mobile design to optimize map for smaller screens.

Personal

Insights

Year over Year Top Pages

Section lander is always ranked in the top 10 pages.
Checking lander is always ranked in the top 15 pages.
Everywhere Checking is always ranked in the top 30 pages.

Online Account Opening

Everywhere Checking accounted for 57.77% of all online account opening conversions in 2021, and 50.7% in 2020. So far in 2022, it accounts for 79.21% of all online account opening conversions.

Service was down on the following dates:

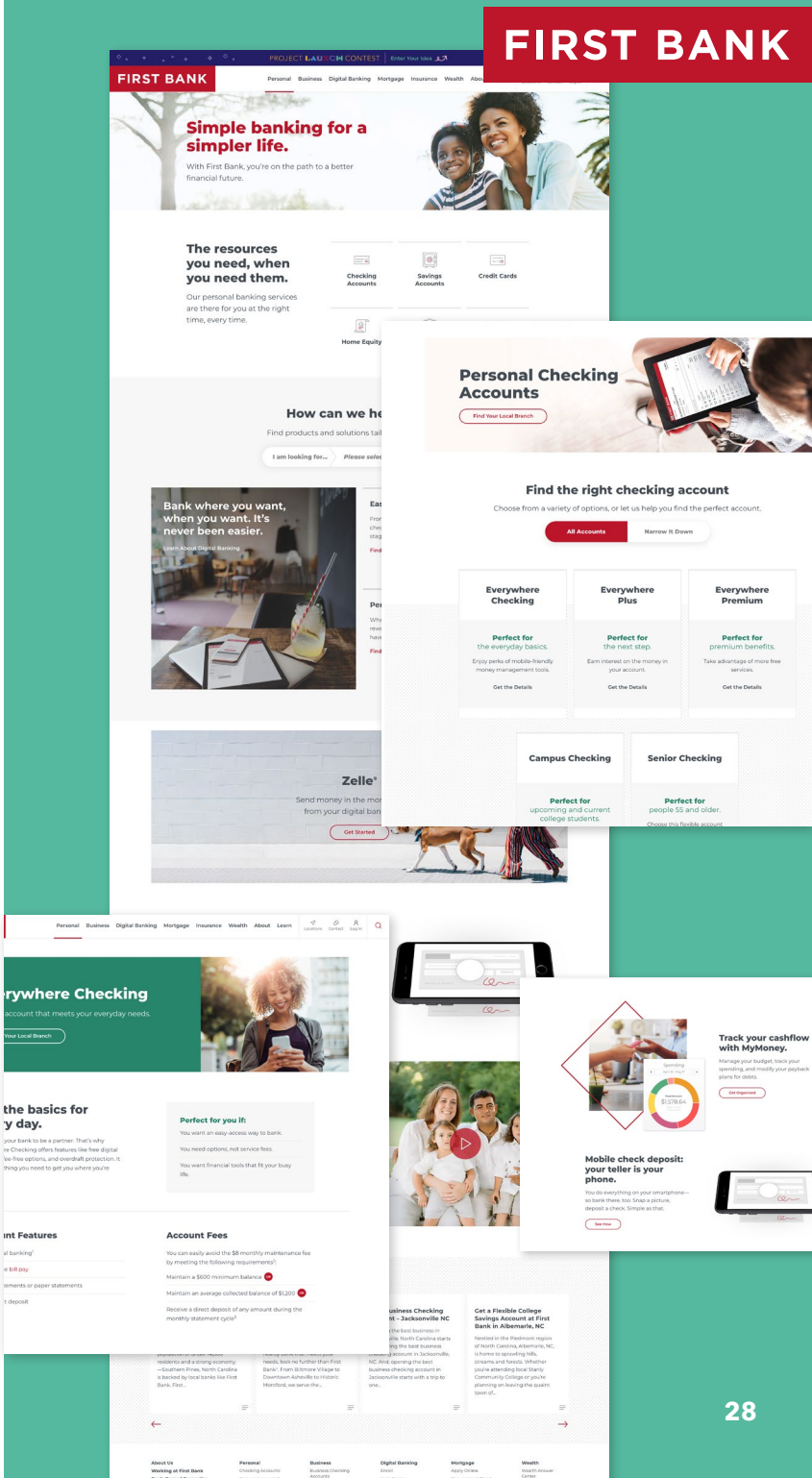
6/24/21 - 7/1/21 [8 days]	**3/17/22 - 4/14/22 [29 days]**
12/31/21 - 1/3/22 [4 days]	**5/17/22 - 6/9/22 [23 days]**

Trends show the site is getting around 30-35 online account opening events per day that the links are available. Each day this isn't on the site is ~32 clicks to online account opening missed. Based on third-party application analytics, around half of these click events translate to completed applications that are being missed with each down time.

Recommendations

Work with third party to resolve online account opening downtime.

See specific module recommendations starting on page 36.



Business

Insights

Year over Year Top Pages

Business pages only account for on average ~10% of the top 100 pages (personal page account for ~20%).

Pages that show in the top 100 are:

Business Lander

Business Checking Lander

Business Essentials Checking

Business Credit Card

Business Loans

Treasury Services and related pages never show in the top 100.

Recommendations

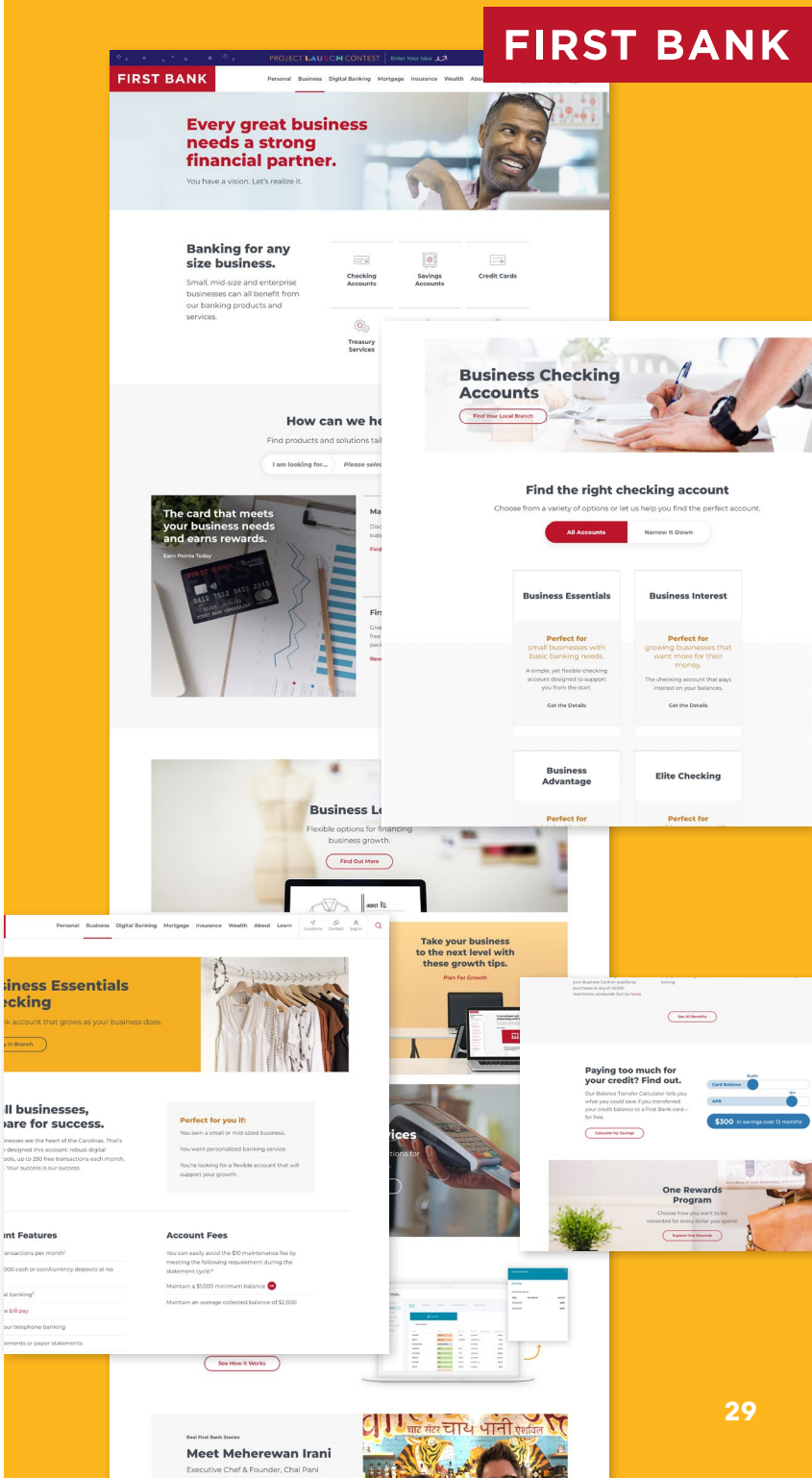
Work with First Bank to determine business goals for business divisions and create recommendations based on goals.

Incorporate SBA back into the website to bring SBA traffic back in. - ***COMPLETED AUGUST 2022***

Niche landers that bundle business products.

Decreasing emphasis on Autobooks.

See specific module recommendations starting on page 36.



Digital Banking

Insights

Year over Year Top Pages

Section lander is always in the top 15 pages.
Typically there are ~13 DB pages within the top 100 pages.

User Flow

The most common pages users go to, if not exiting from the DB lander:

Logoff	**Online Banking Access**
Digital Banking - Enroll	**Business Lander**
Homepage	**Contact Us**
Digital Banking - Mobile App	**Digital Banking - Help Center**
Personal Lander	**Digital Banking - Zelle**

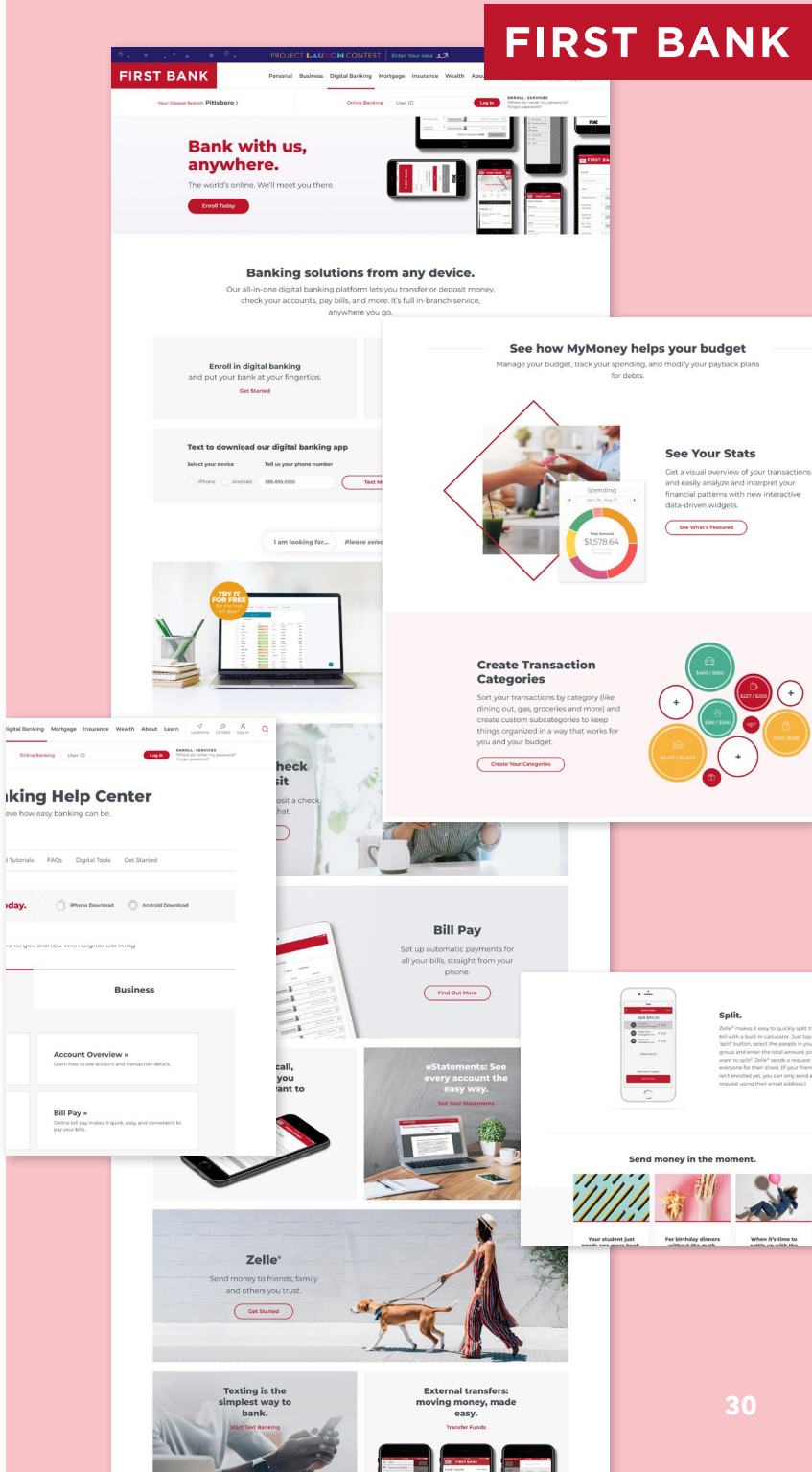
Help Center

The Digital Banking Help Center is showing in the top 50 pages for the first time ever this year. This can be directly tracked to new demos and traffic from the SBT conversion.

Recommendations

Redesign the section interior pages to be more tech forward and highlight each demo on related pages.

See specific module recommendations starting on page 36.



Mortgage

Insights

Year over Year Top Pages

One-Time-Close Construction to Permanent Loan is always in the top 35 pages and has a 2-minute average time on page.
No other mortgage page appears within the top 50 pages.

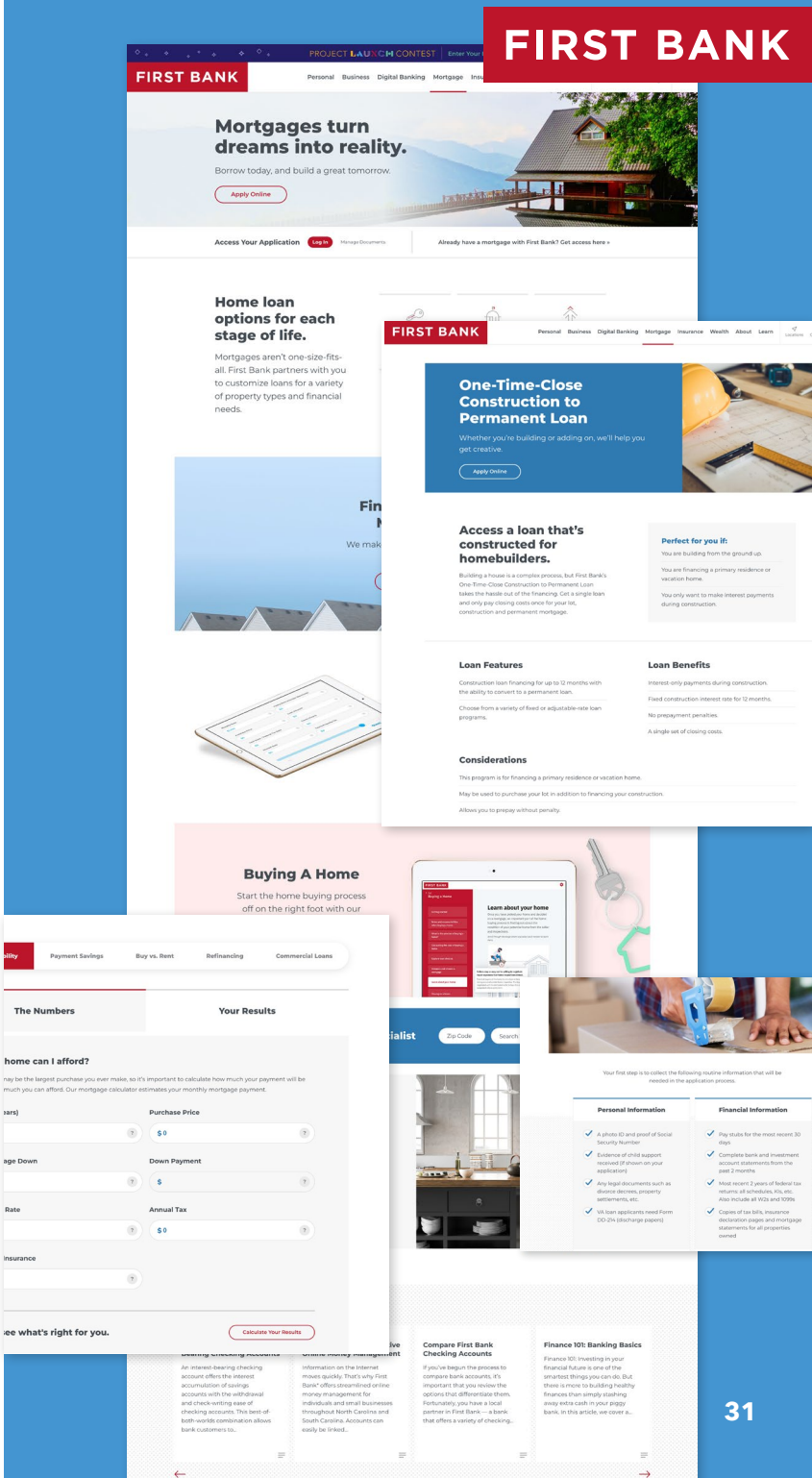
Recommendations

Redesign ads on lander and create ad to highlight the One-Time-Close Construction to Permanent Loan.

Implement tracking on ‘Apply’ buttons.

Work with First Bank to determine business goals for each business division and create recommendations based on goals.

See specific module recommendations starting on page 36.



Mortgage Loan Officers

Insights

Pageviews

Pageviews have steadily decreased over the last three years. One significant change is the removal of LO head shots.

Find a Loan Officer Lander

2020 - 6,478 pageviews

2021 - 4,703 pageviews (down 27.40%)

2022 - 1,535 pageviews (Jan 1 - May 1 2022, down 27.63% since previous year)

Of these views, in 2020 ~60% were searches, in 2021 ~51% were searches, in 2022 (though May 1) ~62% were searches. Users who go here are using the search tool (or are coming in via site modules).

Individual Loan Officer

2020 - 5,667 pageviews

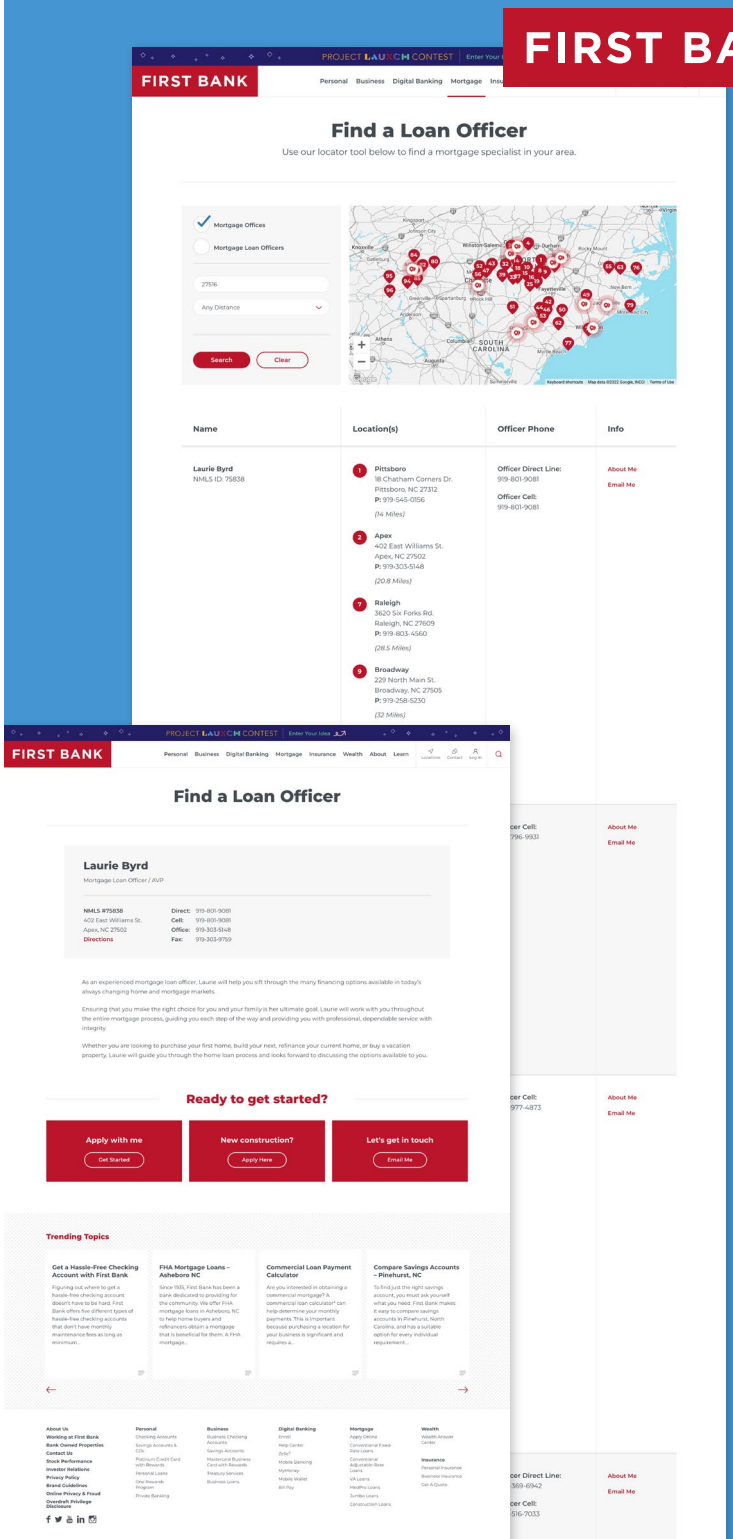
2021 - 5,074 pageviews (down 10.46%)

2022 - 1,671 pageviews (Jan 1 - May 1 2022, down 22.35% since previous year)

Recommendations

Add tracking to the “Apply with me” button at the bottom of individual LO pages.

Track clicks from the search results to the individual LO pages.



About

Insights

Year over Year Top Pages

Section lander is always in the top 20 pages.

User Flow

69.4% of users go to a second page after the lander.
The most common pages users go to:

About - Who We Are	**Locations**
Logoff	**About - Bank Owned Properties**
Contact	**Homepage**
About - Working At First Bank	**Learn Lander**
About - Corporate Overview	**Personal Lander**

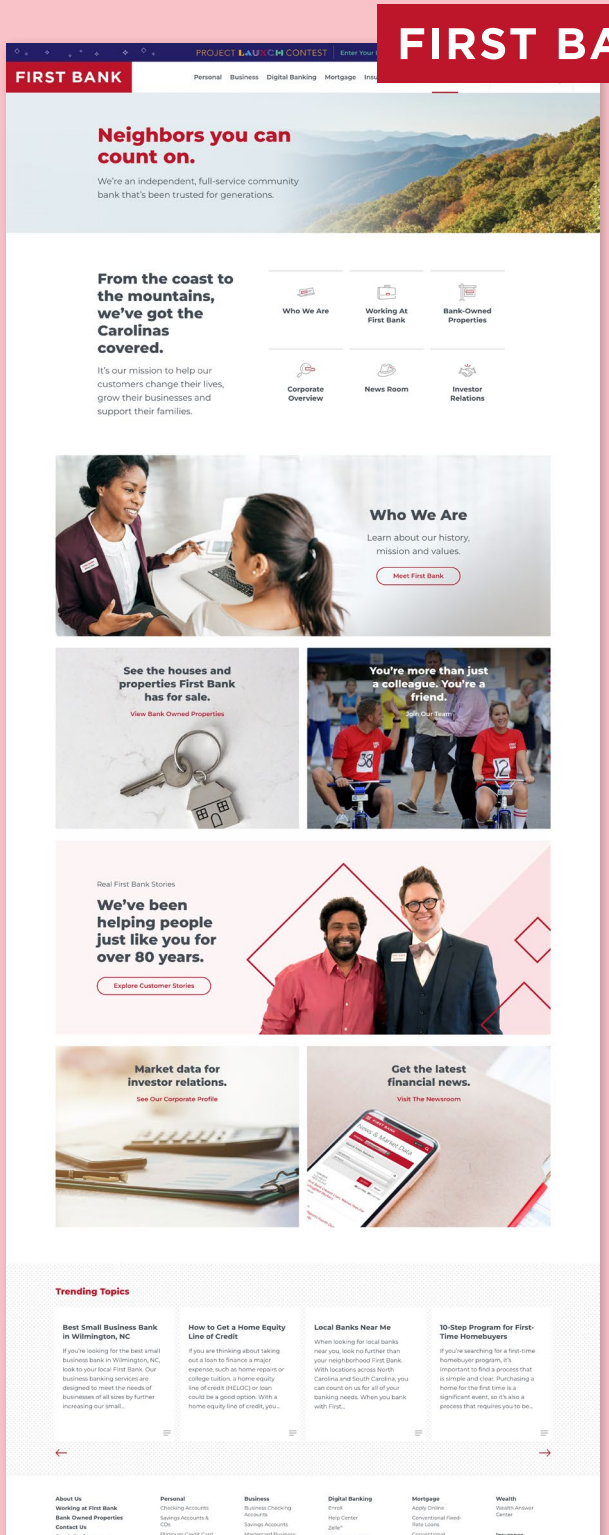
Section Priorities

Section lacks emphasis on hiring and corporate citizenship from the lander.

Recommendations

Redesign lander to represent the About section, goals, and the look of the bank brand currently.

Hold a photoshoot and capture photos at select events to incorporate more images of real FB employees.



Learn & Articles

Insights

Year over Year

Section lander normally just makes the top 50 pages with a lower average time on page. However, bounce and exit rates for the section pages are lower than site average of 53% and 29% respectively. This means that people are more likely to be continuing on to other pages from these.

User Flow

Most visitors to the Learn landing page are not navigating to the tabs, however most recent content is always available directly on the lander. When people are navigating to tabs, ranking is as follows for 2022:

1. **Personal: 439 pageviews**
2. **Mortgage: 376 pageviews**
3. **Business: 193 pageviews**
4. **Teens: 164 pageviews**

Articles

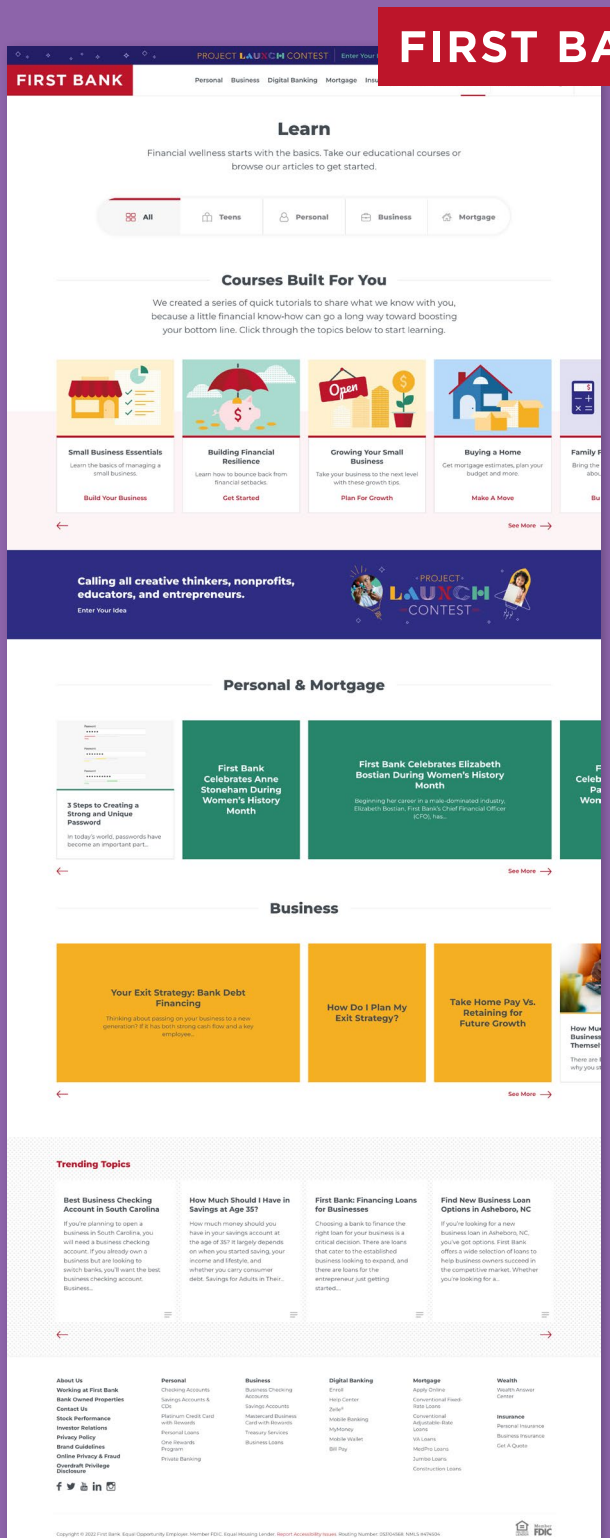
There are 3 specific articles that are always in the top 20 pages YoY:

Budgeting 101: Personal Budget Categories

Four Different Types of Services | Banking

Online Money Hacks Article

In general, there are about 10 articles that are frequented within the top 100 pages. Of note, an article on construction loans. These pages also are some of our top entry and exit pages.



Learn & Articles

Insights

Traffic Sources

Overall for articles in 2022, the top sources are:

Google 84%

Direct 12%

Bing 1%

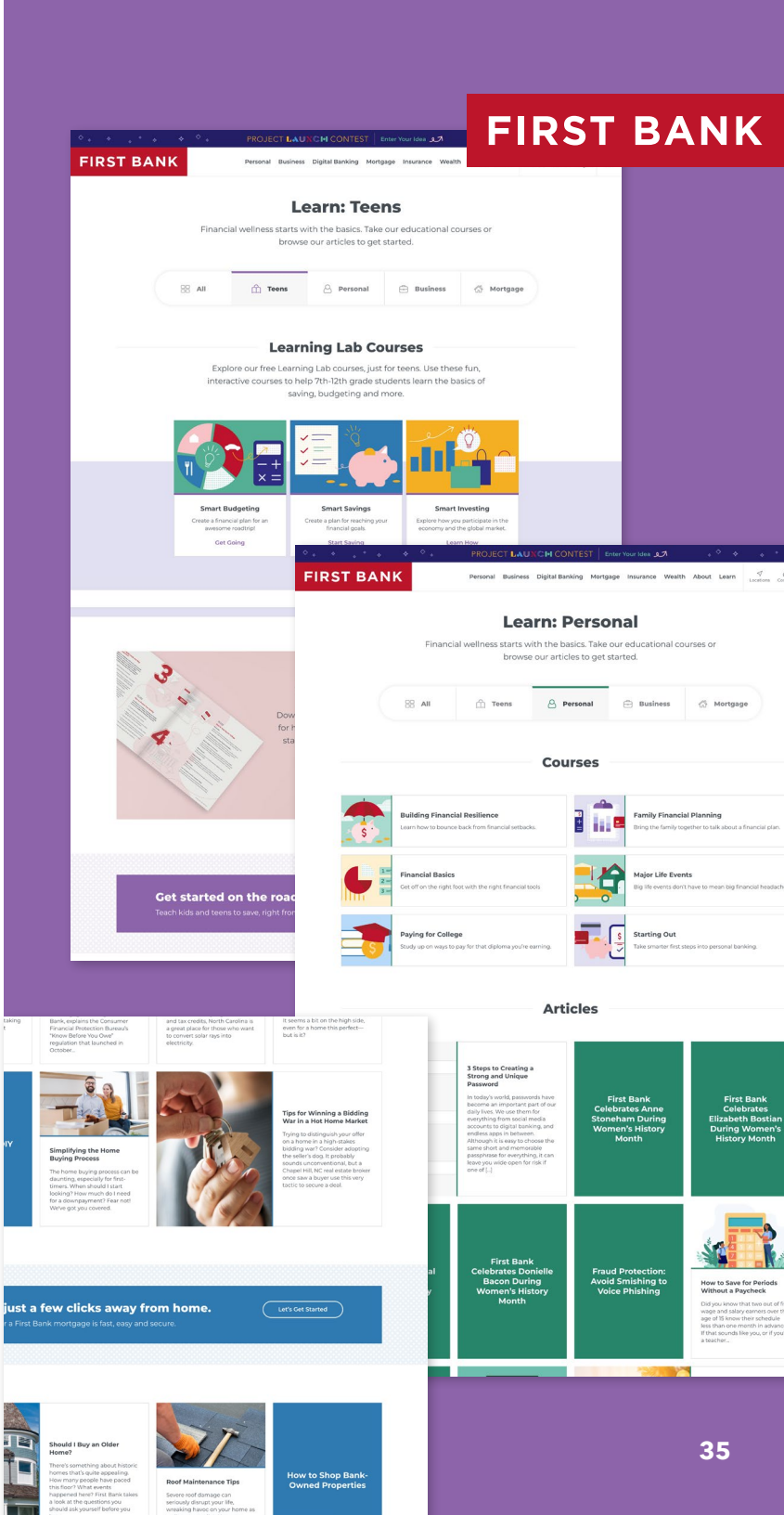
Recommendations

Audit top articles for accurate messaging and identify what is bringing people in and how we could convert better.

Audit all pages for broken links, videos, etc.

Create more engagement by using more video content.

Enable EverFi click tracking to identify how many people are going to the courses.



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Module Reviews

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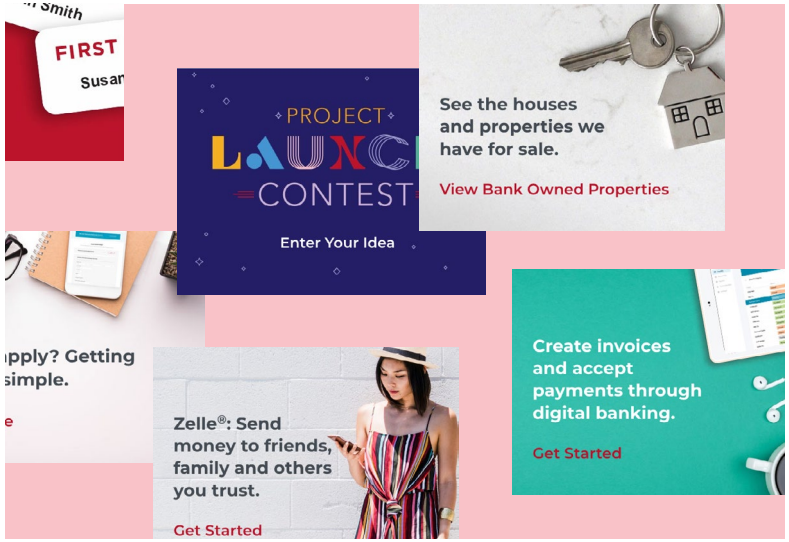
Individual Modules



Dropdown Ads

Insights

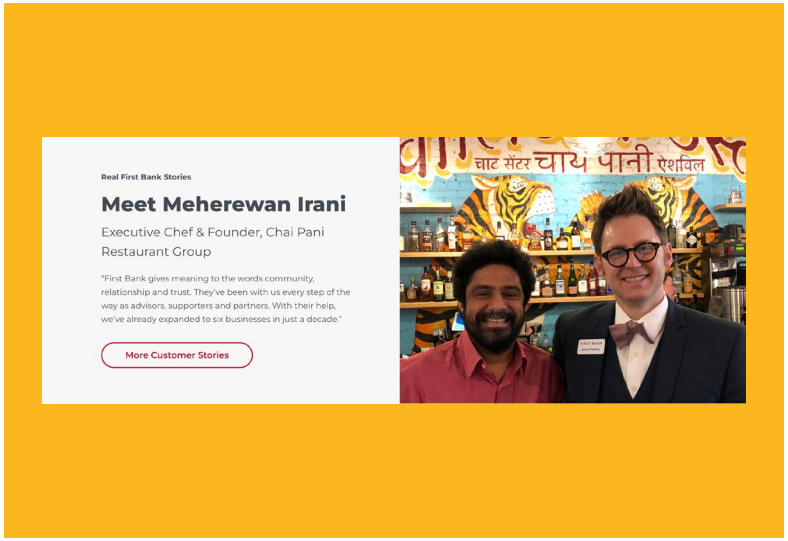
#3 most common tracked event in 2022 with 1,065 uses, however, only 0.2% of visits click on them in totality.

The most commonly clicked ads in 2022 are:

Bank Owned Properties 38%	**Autobooks 14%**
Working at First Bank 19%	**Insurance Quote 5%**
Zelle 15%	

Recommendations

Update on a quarterly basis.



Testimonials

Insights

A majority of testimonials have not been updated since 2018.

Recommendations

Assess where we need to add and update testimonials throughout.

Add to tool tracking.

Create a template where users can submit testimonials.

Update design.

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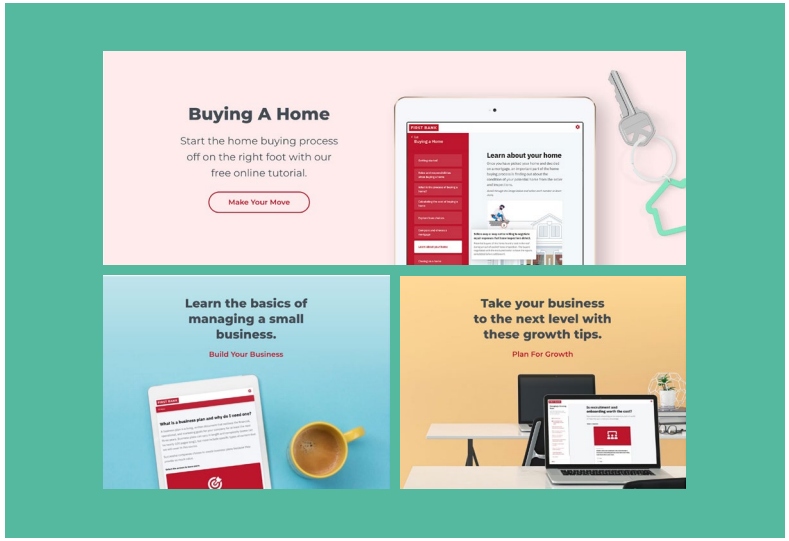
Individual Modules

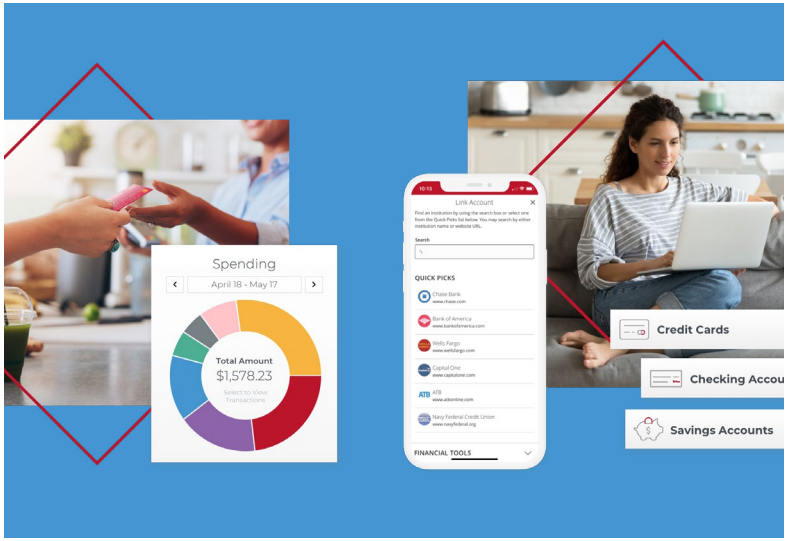


EverFi Ads

Recommendations

Update to one style for all ads that helps identify them as courses.

Add to tool tracking.



Animated Ads

Recommendations

Update to new branding styles and assess which ones need further updates for added visual interest.

Audit to see where and what we may want to add.

Add to tool tracking.

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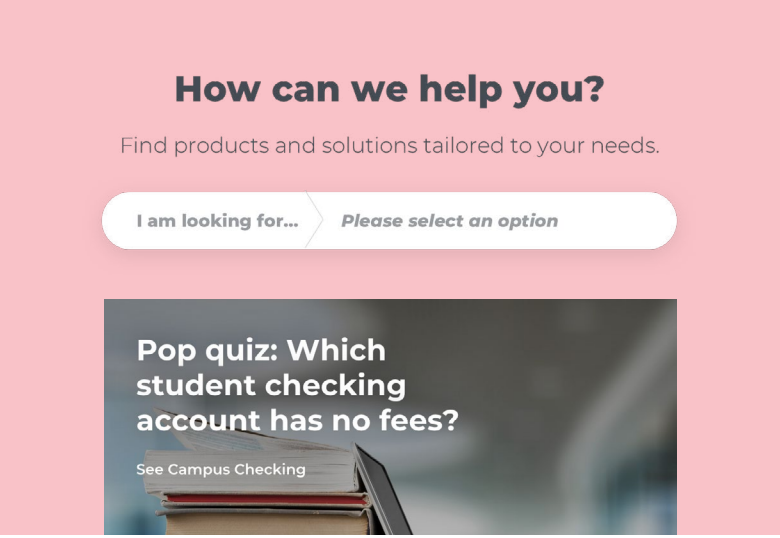
Individual Modules



Help You Dropdowns

Insights

5-6% of users use this tool.

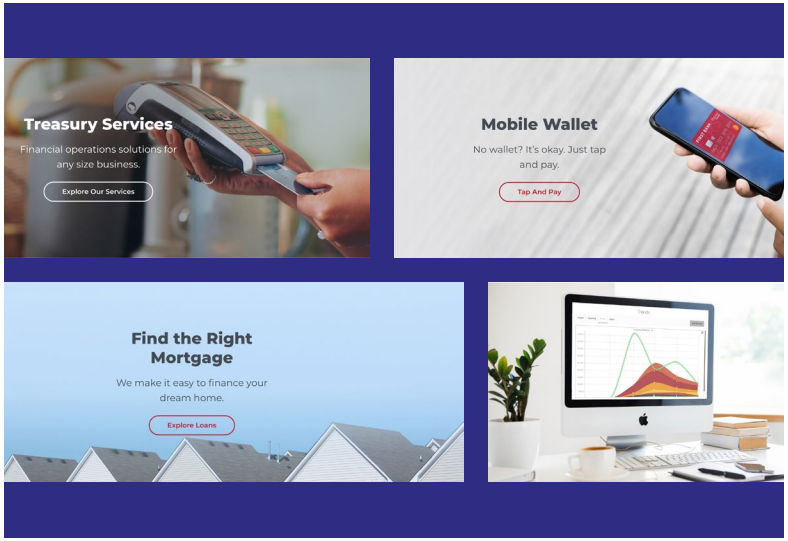
In 2022, this tool on the Logoff page is ranking within the top 50 of tools used by page.

Items within each variation have remained generally the same since launch in 2018.

Recommendations

Audit images and text to increase interest again.

Update on a 6-month basis.



Full Width Ads

Insights

A majority of ads have not been updated since 2018, excluding new ads.

Recommendations

Audit placement, text, and imagery for all responsive sizes.

Add to tool tracking.

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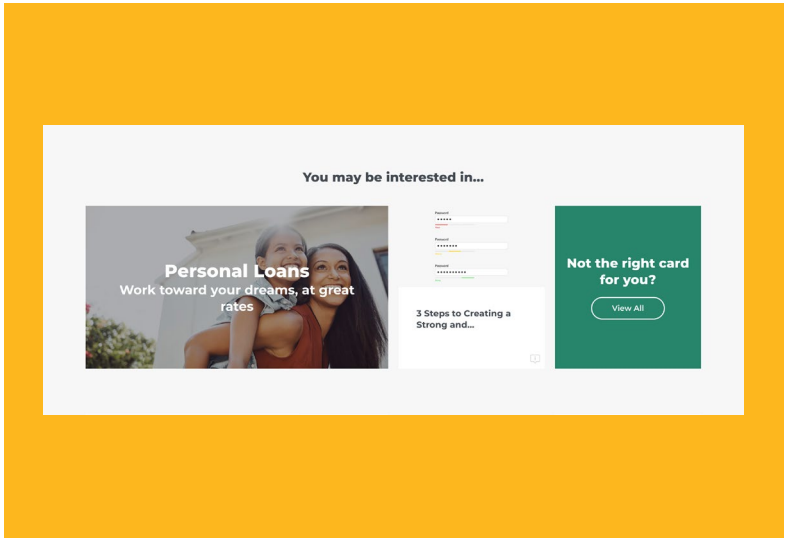
Individual Modules



You May Be Interested In

Recommendations

Audit cross-sell ads throughout for updates and additions.

Ensure duplications aren't happening between this module and Trending Topics.

Add to tool tracking.

Site Imagery

Recommendations

Audit to see where we should update imagery.

Update lander hero imagery to include brand diamonds.

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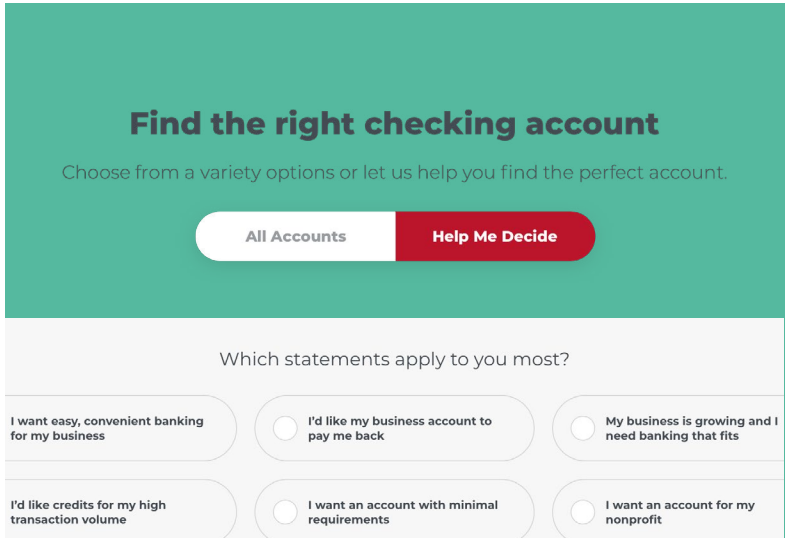
Individual Modules



Narrow Down Tool

Insights

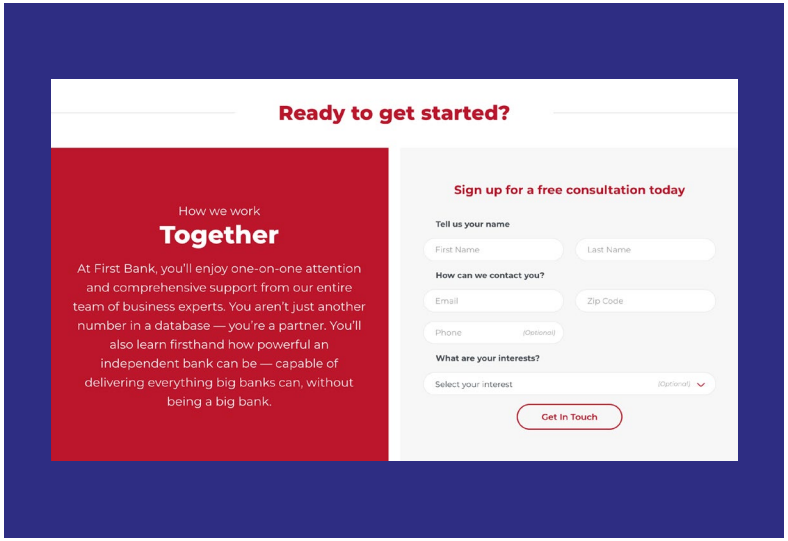
Top event item for tool usage in tools that are tracked.

Typically used by 19-20% of users in tools tracked, equating to 4,311 total events, and 2,118 unique events in 2021.

The top page people use this tool is on Personal Checking Accounts.

Recommendations

Audit content and results to determine updates.



Forms

Insights

The top 10 forms used in 2022 are on the following pages, with the top 4 being the most popular by far:

Business Loans	**Good Deeds**	**Wealth - No Account**
Home Equity	**Boat Loans**	**Wealth - Services**
SBA Loans	**First@Work**	**Select Bank Documents**
Auto Loans		

Recommendations

Consider form redesign with A/B testing. Add a "How did you hear about us?" optional dropdown to forms.

Individual Modules

OLB Demos

Insights

1,394 views in 2022, however, not a ton of traffic.

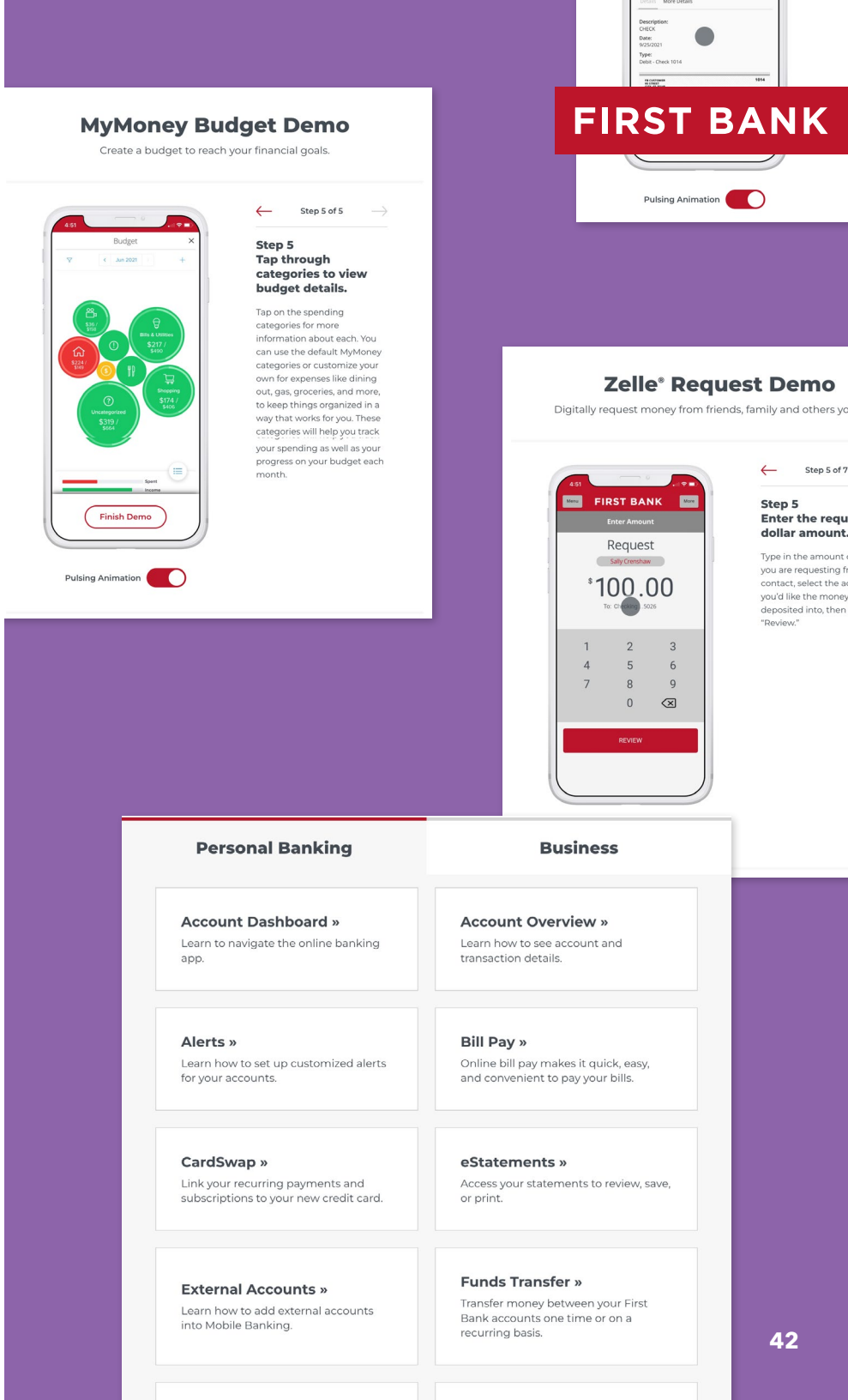
The Digital Banking Help Center is showing in the top 50 pages for the first time ever this year. This can be directly tracked to new demos and traffic from the SBT conversion.

In order of popularity, the top demos in 2022 are:

1	**Account Dashboard Demo 20.65%**
2	**eStatements Demo 11.40%**
3	**Account Overview Demo 10.32%**
4	**Mobile Check Deposit Demo 7.60%**
5	**Funds Transfer Demo 6.88%**
6	**Bill Pay Demo 6.16%**
7	**External Accounts Demo 3.80%**
8	**CardSwap Demo 3.23%**
9	**Account Overview Business Demo 2.87%**
10	**Mobile Bill Pay Demo 2.80%**

Recommendations

Depending on business goals, there's an opportunity to add more user interaction tracking for each individual demo.



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Next Steps

What's Next?

1. Discuss goals for marketing and lines of business
2. Determine approved recommendations from audit
3. Create a timeline for implementing recommendations
4. Begin deeper dive audits and recommendations
5. Establish data wanted for quarterly reports and segmentation updates

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Website Audit 2022

Presented by:

Rivers Agency | August 2022