

# CASE STUDY

Using Journey Mapping to Help People  
Build Generational Wealth



Freeman Capital

## CASE OVERVIEW

Established with a mission to help everyday people build generational wealth, Freeman Capital was looking for ways to identify service gaps and improve customer experience along the way.

They decided to use customer journey mapping to reach that goal and needed an online tool to create journey maps and share them with their remote team.



“*Our company was built to be that partner, to be that guide for everyday people to help them with the problems the challenges and the opportunity that we all face. Regardless if we are millionaires or not,*”

*says Calvin Williams, Founder and CEO of Freeman Capital.*



**Industry:** Financial services

**Type:** Privately held

**Founded:** 2015

**Headquarters:** Charlotte, NC, United States

**Team Members:** 15

**Specialties:** Wealth management, investment management, financial planning

## ABOUT FREEMAN CAPITAL

Freeman Capital is a private wealth management company founded in 2015. Its mission is to help everyday people live their best life by closing the wealth gap.

Freeman Capital teaches its clients about financial matters and helps them make critical financial decisions with confidence, regain control of their day-to-day finances, and get started with both active and passive investing.

# MAKING THE ROAD TO WEALTH EVEN LESS BUMPY

Working with ordinary people and helping them grow and build wealth to live the best life that they can, Freeman Capital wanted to improve their services and deliver the best possible customer experience on the bumpy road to wealth management.

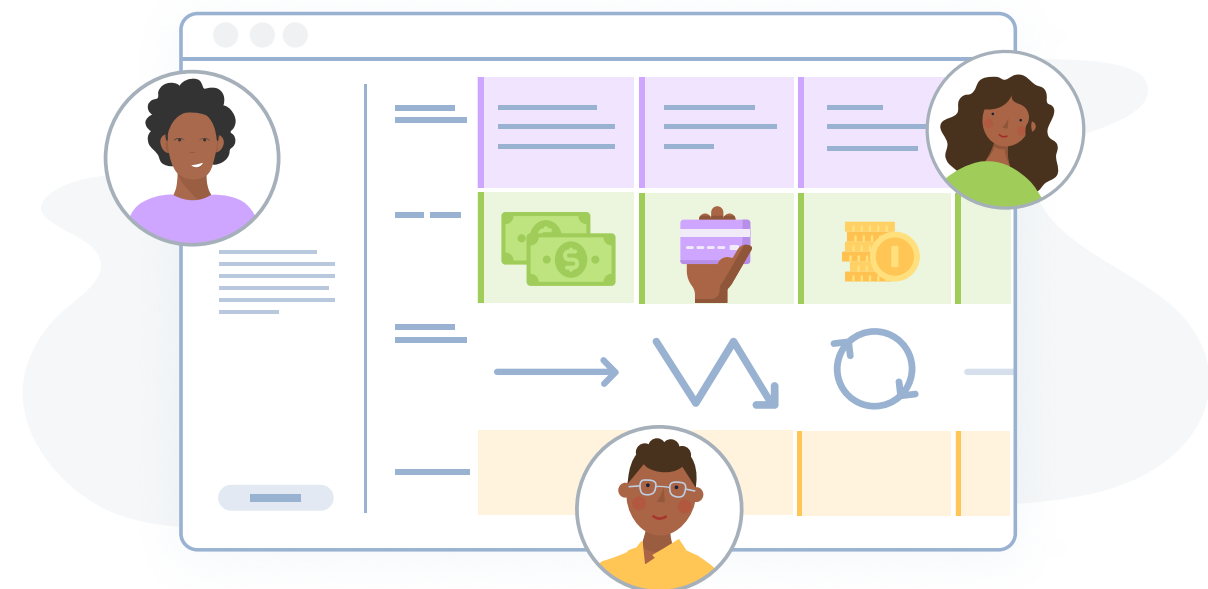
*“Someone told me that I needed to create a customer journey map, and I didn't know what it was.”*

So there were two problems: as a founder, Mr. Williams had not created a journey map before, and their team was remote.

*“I needed a tool that would help make it super easy for me to learn how to map customer journeys, and do it easily and share maps with my team.”*

UXPressia turned out to have everything that Mr. Williams was looking for.

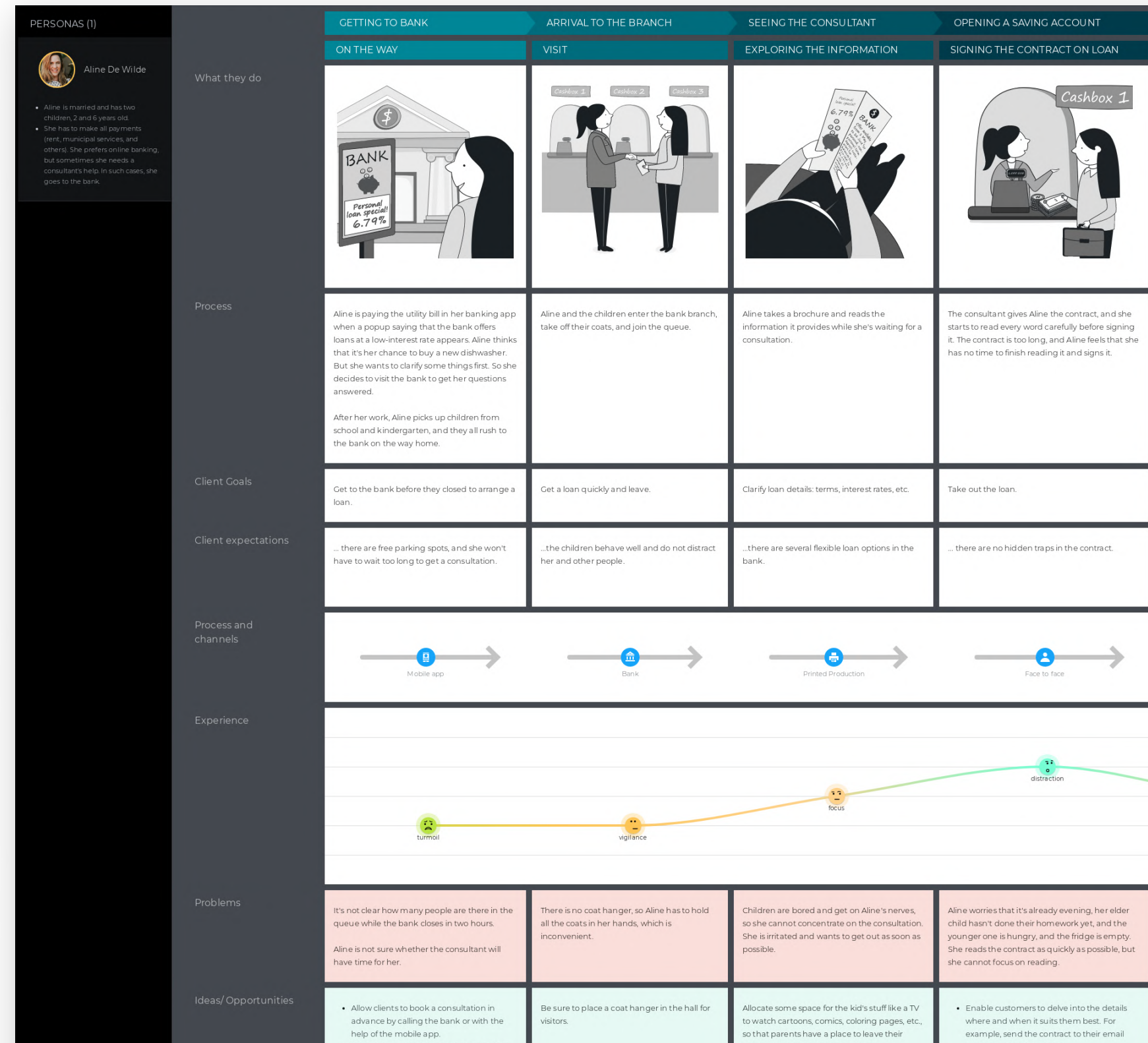
*“It was super easy to pick up and just get started. And the team was very impressed with how great the tool was.”*



# HOW UXPRESSIA HELPS

Freeman Capital first used UXPressia's Journey Mapping tool to map out the customer data journey, and then identify where the gaps were to understand what they needed to improve.

“Then we had everyone on board from marketing, development, leadership, operations, and customer support so that we all saw and knew what's supposed to happen. And that is the beauty of customer journey maps, the way that we use it.”



Today they use UXPressia to create everything from customer journey maps to impact maps and personas.

“All of those things help us think through things in a really easy way and identify gaps and better help our customers.”

Freeman Capital uses UXPressia from the very beginning of every project.

“As soon as we have an idea, we start with mapping out the customer journey.”

**John Lee**

MARKET SIZE: 19 %

TYPE: **Rational**

**Background**  
John is an entrepreneur who owns a company that has recently hired many people. He has been the one to process payrolls for his employees though he's not very good at accounting. As the number of people increased to 30, it became too difficult for John to handle payrolls by himself, so he wants to subcontract payroll processing to a bank.  
  
When it comes to serious matters like finance and related stuff, John cares about cost, quality, work speed, and the balance between them.

**Motivations**

- Total outsourcing of payroll processing to a bank
- Special conditions for employees

**Frustrations**

- Paperwork
- Need to double-check

**Goals**  
Subcontract payroll processing

**Channels**

**Skills**

Accounting: 45%  
Tech-savvy: 75%  
People management: 50%

**Demographic**  
Male, 31 years  
Marseille  
Entrepreneur

**Technology**  
Apple (Mobile & Desktop)

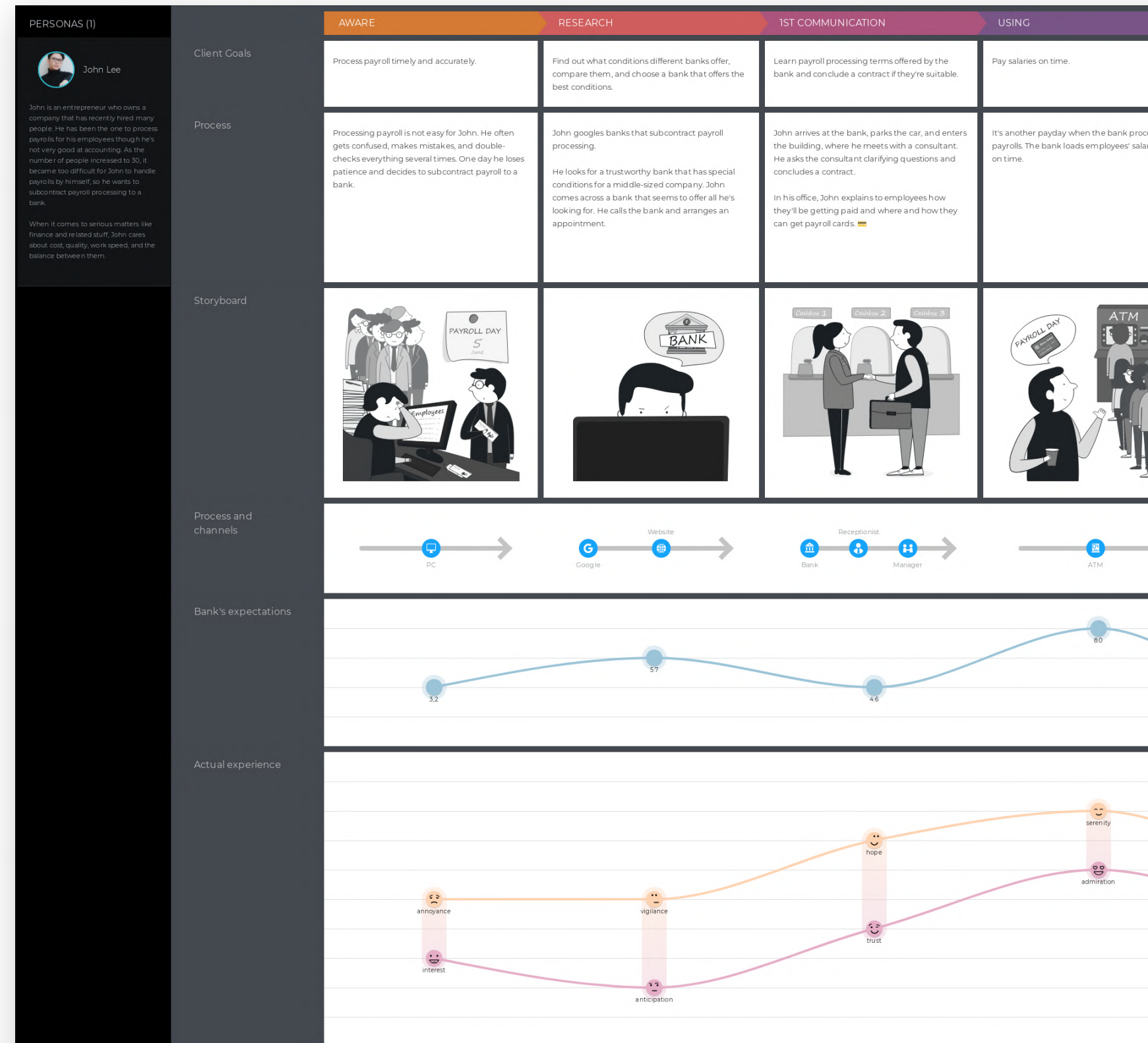
**Browsers**  
Chrome, Firefox, Safari

**Demographic**  
Female, 35 years  
Belgium, Antwerp  
Married  
Social worker  
€36,000 per year

**Skills**  
Tech savvy: 50%  
Financial literacy: 60%

They've used such an approach to launch social media campaigns, a mobile app, and websites. Freeman Capital uses the platform to create both customer and customer data journey maps. Where is the data going? What systems does it have to touch? What triggers and actions happen as a result of that? — They include all of these in their maps.

*“UXPressia has shifted at least my thought process. And it helps us become customer-first focused.”*



# BUILDING BETTER EXPERIENCES FOR NEW PROJECTS

Freeman Capital is going to use UXPressia for its future projects, one of which is affiliate relationships.



“We’ll use UXPressia for every interaction that we have with customers or customer data.”

*says Calvin Williams, Founder and CEO of Freeman Capital.*



# Thank you

Get in touch with us to start your journey with UXPressia.

[support@uxpressia.com](mailto:support@uxpressia.com)

We are looking forward to having you aboard!

