

DEBT RESOLUTION COMPANY NEW CLIENT WELCOME KIT REDESIGN *A CASE STUDY*



THE CHALLENGE

During the crucial onboarding phase, Debt Resolution Company faced a significant client retention challenge. Despite the substantial time spent with representatives during enrollment, many new clients abandoned the debt settlement program shortly after signing up due to confusion about how it actually worked.

- The existing Welcome Kit was contributing to this problem with several key issues:
- Text-heavy pages filled with financial jargon and technical terminology
- Poor visual organization makes information difficult to follow
- Generic stock photography (credit cards being cut, piggy banks) that failed to connect emotionally
- Numerous typos and inconsistencies undermined our credibility
- Lack of clear step-by-step guidance for new program participants

MY APPROACH

I advocated strongly to company leadership for a complete revamp of the Welcome Kit, focusing on three core principles:

IMPROVED VISUAL COMMUNICATION

- Created a clear visual journey map showing all program stages
- Developed color-coding to distinguish between enrollment, settlement, and payoff phases
- Replaced generic stock photos with warmer, more authentic imagery of diverse ages, genders, and backgrounds
- Used consistent icons and visual cues to highlight key information

ACCESSIBLE, ACTIONABLE CONTENT

- Rewrote all copy to eliminate jargon and simplify complex concepts
- Created specific "To-Do" checklists at the end of each section
- Organized information in a logical sequence that matched the client's journey
- Added testimonials from real clients to build confidence and credibility

EMPATHETIC TONE AND MESSAGING

- Reframed the debt settlement journey as a positive step toward financial freedom
- Acknowledged common concerns and emotional aspects of debt resolution
- Included reassurance about potential challenges (credit impact, creditor calls)
- Created a supportive rather than clinical tone throughout all materials



COLLABORATIVE PROCESS

Working closely with our design team, I:

- Conducted content audits of the existing onboarding materials
- Created detailed wireframes for the new layout and information hierarchy
- Wrote and revised copy based on cross-departmental team feedback
- Collaborated on photo selection to ensure a diverse representation of customer ages, family units, and backgrounds.
- Guided production of the final printed piece

MEASURABLE RESULTS

We implemented a testing process through our Customer Representative team, asking recipients of both the old and new kits to rate various aspects of their experience:

- The redesigned kit received higher ratings across all evaluation categories
- Most significantly, we achieved a 90% top-two-box score on the critical question: *"After reading the Welcome Kit, do you feel like you better understand how your debt settlement program works?"*
 - This score highlights the significant impact of the redesign on client understanding.
- Representative feedback indicated the new kit significantly reduced the number of basic clarification questions they received from new clients
- The visual journey map became so successful that it was adapted for use in other client communications

OVERCOMING CHALLENGES

This project required significant organizational change management:

- I needed to convince leadership that the investment in premium design would deliver ROI
- Company stakeholders initially resisted departing from traditional financial services communications
- Budget constraints required creative solutions for production while maintaining quality standards
- Regulatory compliance requirements needed to be satisfied without reverting to dense legal language

KEY TAKEAWAYS

This project demonstrated that thoughtful design and clear communication directly impact client retention and program success. By focusing on the client experience first, we created a Welcome Kit that looked better and performed better as an educational tool.

The success of this redesign significantly influenced how Debt Resolution Company approached all client communications. It serves as a reassurance that accessible, empathetic materials build stronger client relationships and trust, which is especially critical in the sensitive area of debt management.

