

From Opened to Funded:

How content clarity increased account activation

Company: Questrade Financial Group

Product type: Online investing platform

User segment: First-time investors opening accounts via mobile and desktop

Team: 1 PM, 1 product designer, 1 engineer, me (solo content designer)

Constraints: No new functionality; we could only improve clarity, layout, and messaging



TL;DR

Problem

Users were completing the account opening process but dropping off before funding—leaving investment accounts inactive. The product team needed a way to improve activation without introducing new features or friction.

My Role

I led the UX content design for the funding flow, working with product, visual design, and analytics to identify friction and rewrite interaction points. This was a fast-moving project with real revenue implications.

Impact

Improved clarity and visibility of the primary funding method led to a measurable increase in completed funding actions—specifically, a 14% rise in debit card usage post-redesign.

THE PROBLEM

Analytics showed a large drop-off between account creation and funding.

Over 60% of new users opened accounts but didn't fund them within the first week.

After reviewing the flow, we discovered:

- The debit card option, which was the most immediate way to fund, was low on the page
- The labelling of funding options was technical and non-user friendly
- There was no clear hierarchy or emphasis guiding users toward the recommended action

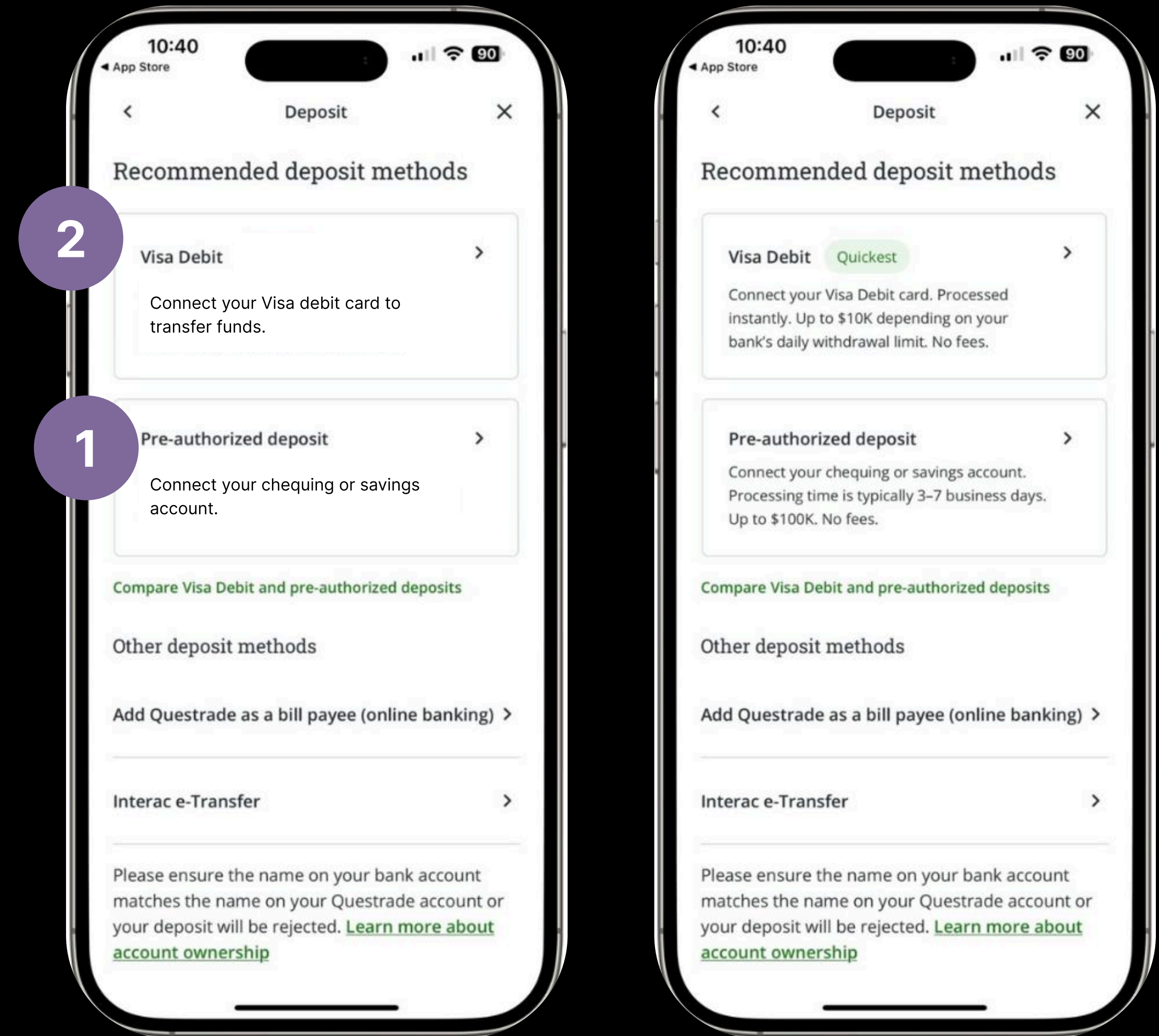
What I Did

UX Content Strategy

- Elevated Visa Debit visually and verbally in the flow
- Rewrote microcopy to emphasize speed, reliability, and confirmation
- Used default ordering and subtle nudges to drive the preferred path
- Simplified error copy to reduce anxiety and hesitation

Testing & Alignment

- Collaborated with legal and compliance to validate wording
- Partnered with Design to test visual hierarchy updates
- Validated launch readiness and post-release metrics



Before

After

My Approach

1. Audited the Flow

- Mapped each screen and action
- Annotated where language was unclear or misaligned with user mental models
- Identified visual hierarchy issues around key CTAs

2. Simplified and Prioritized Content

- Moved debit card option up
- Rewrote the headline and body copy to emphasize:
- Immediacy: “Fund instantly with your debit card”
- Reassurance: “No fees”
- Clarified alternative methods without confusing the primary path

3. Collaborated Closely with Design & Dev, Legal & Compliance

- Partnered with design to test layout options and content hierarchy
- Provided in-Figma copy annotations and alt copy for mobile breakpoints
- Sat in on QA to ensure implementation held up across edge cases
- Aligned messaging with business goals, legal tone, and brand clarity
- Delivered final UX copy + error states for the payments module

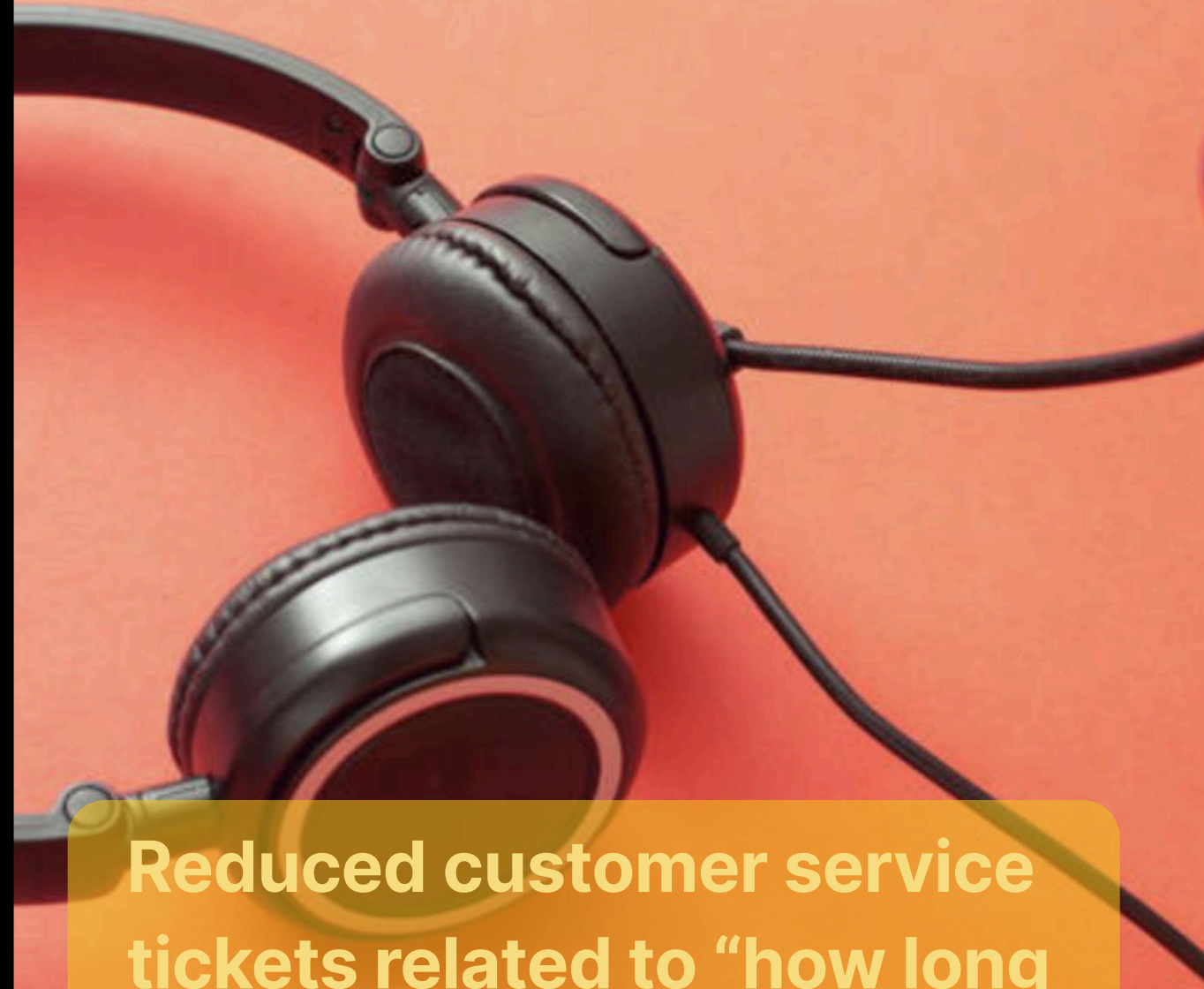
Key Results

#1



+14% increase in Visa Debit transactions immediately after launch

#2



Reduced customer service tickets related to “how long will this take?”

#3



Shorter time-to-activation

What I Learned

Even highly motivated users need visible, confidence-building cues to complete financial actions.

Strategic content placement, not just language, can unblock high-value user behaviours.

Messaging hierarchy is just as important as visual hierarchy in high-stakes flows.

Thank you!

Amruta Apte

Strategic Content Designer · www.amrutaapte.com
Available immediately for contract roles & consulting
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