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Success Starts Here

Bright Pattern Customer Success Series

**MONEY**  **LADDER**

Climbing Toward Greatness with Bright Pattern  
Omnichannel Customer Experience

#### Company Profile

Money Ladder has over 10 years of experience focusing on individual successes, which range from customer technical experiences to finances. The company prides itself in providing a premium experience to assist customers in finding personal freedom while planning for a comfortable future. Money Ladder will change the financial industry by truly focusing on individuals, instead of just their finances.

**Industry:** Personal Financial Planning

**Website:** <https://www.moneyladder.com>

#### Overview

Money Ladder is a start-up that focuses on helping people not only get out of debt but also plan for specific life goals, such as buying a house, planning for retirement, or saving for their children's education. It may sound like a standard financial planning service, but what sets Money Ladder apart from the competition is treating clients like humans and not just another entry onto a spreadsheet.

The company offers a truly refreshing take on the customer experience (CX) in an industry that has taken several hits over the past few years.

#### Objectives

- Human touch—never lose sight of that
- Available and ready for customers at all times
- The right tools now and the ability to scale with growth
- Accommodate where the customer is and how they want to communicate



“ I really enjoy the Bright Pattern team and the vision of where the platform is going. —Jon Ward, Managing Partner at Money Ladder ”

## Money Ladder Contact Center Challenges

Jon Ward's background is not in finance but in the tech sector, where he worked for companies like Apple, Google, and Nest. With his fresh set of eyes and a vision of being a leader in the personal finance space, Ward knew that he would need the right people and tools to get the job done. Assembling an agile team of dedicated experts was an important milestone, but now Money Ladder would need a platform that could connect its staff to clients using any number of channels.

## Money Ladder Solution

"I had reviewed Bright Pattern's platform two and a half years ago when I was at Nest," explained Ward, adding, "I really enjoyed the team and the vision of where the platform was going."

After starting Money Ladder, Ward took another look at Bright Pattern and noted that it stood out, not just for its robust feature set, but also for the scalability.

When it came time to implement Bright Pattern's platform, the process was straightforward and smooth. Money Ladder needed a quick turnaround and Bright Pattern delivered. Even for a tech guy like Ward, there were still a few questions with some of the features. "The team was phenomenal in showing me the parts I couldn't figure out on my own," exclaimed Ward.



“ From day one, our employees saw the value in the product and liked being able to use it. I think that says something about what Bright Pattern is doing. ”

—Jon Ward Managing Partner at Money Ladder

## Results of Switching to Bright Pattern

Money Ladder has seen drastic improvements in reporting and supervisory functions. The management team loves the features and feels more in tune with the reps and their calls. But it's not just the managers that enjoy using Bright Pattern. "From day one, our employees saw the value in the product and liked being able to use it...I think that says something about what Bright Pattern is doing," noted Ward.