01 / OWN PROJECTS & PRODUCTS

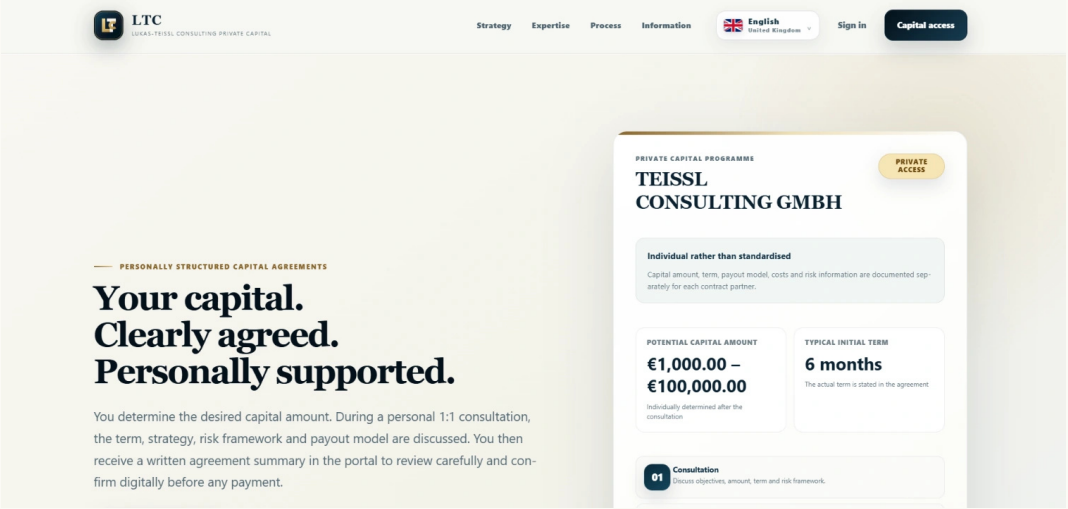
Capital · Documented Client Journey

A clear path through sensitive decisions.

View online

PROJECT PROFILE

Capital is my portal project for a supported enquiry and documentation process. Personal discussion, written terms and the client area are clearly separated. As a digital reference, it shows how a complex service can be organised into understandable steps.



Desktop view · Supplied project screenshot · Original language: EN. Source language: EN.

AREAS OF WORK

Portal presentation · Client journey · Information structure

Project overview

The public website explains a journey from enquiry through personal consultation to written terms. Portal access is separate. For this digital reference, the relevant aspect is how clearly these steps are described: visitors can see when information is reviewed, discussed and confirmed. The website also presents topic areas, risk information and company details.

Task & objectives

A sensitive enquiry needs a traceable process and a clear distinction between general information and individual agreements.

My project involvement

I present Capital as my own portal project, focusing on its information structure and publicly explained client journey. Individual agreements and personal accounts stay private. The reference concerns the digital presentation of the process.

Features that support everyday work.

Step-by-step journey

Enquiry, discussion and written terms are explained as distinct stages.

Personal area

A separate access point distinguishes individual content from public information.

Supporting information

Risk and agreement information are available as separate resources.

Design & user experience

The process is explained before the access point. This makes it clear which decisions need personal discussion and which information is already public.

Value of the solution

A clear sequence helps distinguish general information, personal discussion and individual documents. It is a useful principle for sensitive portal workflows, not investment advice, a return promise or a statement of professional authorisation.

Could this approach work for your project?

Would you like to bring a consultation-led client process online? We can define which information is public and when personal access becomes necessary.

Further insights

Visit project website

Explore the project online →

Arrange an initial conversation →

All references online