

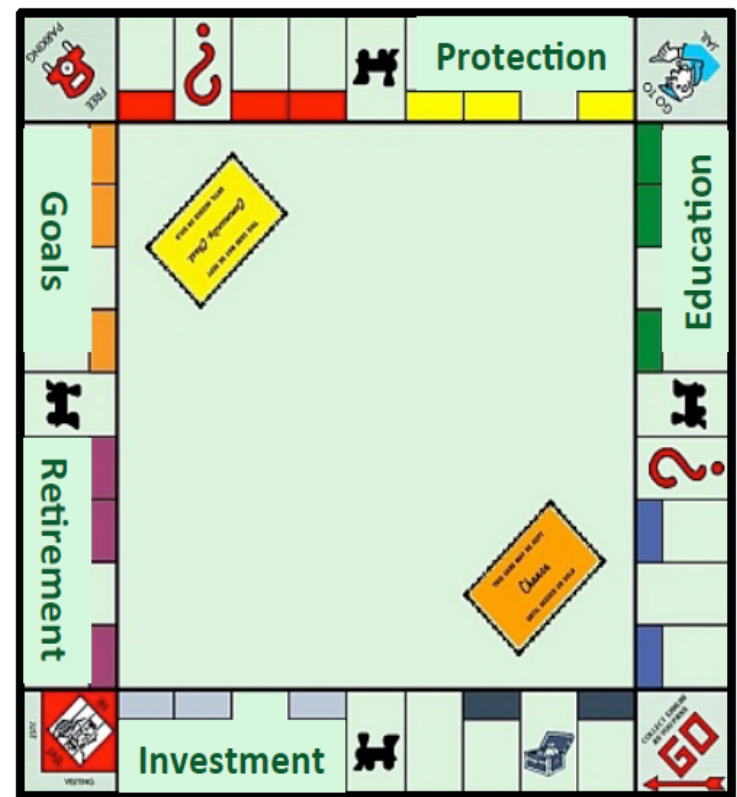
(2) Need Analysis, including simplified calculator

- Support 5 Types of need: Protection/Investment/Retirement/Education/Goals
- Simplified Calculator with common data storage and charts
- Email & wireless print of calculator results & charts
- Specified calculation parameters, e.g. year inflation rate, return rate, can be dynamically configurable without upgrade the app.
- Reference factual information, e.g. Retirement age, can be dynamically updated without upgrade the app.
- Results of each customer will be encrypted and saved in the app for next time follow up.

(2) Need Analysis – Customer Interaction

Need Analysis should be customer-centric, intuitive and gamified to arise customers' interest. At the same time, get real customers' profile for accurate results.

- Utilizing the board game idea, like Monopoly, to represent our life journey.
- The 5 need analysis can be dynamically arranged, or skipped, to create tailor-made sequence for each customer. Click to start calculator.
- Creative idea:
 - 1) Take photo of customer to tailor-make an avatar as digital token
 - 2) Play with physical props: token & card



(2) Need Analysis – Customer Interaction

1. Avatar as digital token

- Capture one photo from customer, can automatically generate avatar with different face expression, which is used in the board game and calculator.



Input: 1 photo



Output: Graphics of different face expressions

- When entering various parameters for calculator, the outlook of the avatar will be changed accordingly. E.g. dress in rich style, have kids, etc.



Single life



With family

(2) Need Analysis – Customer Interaction

2. Physical token & cards control

- Move the physical token on tablet to trigger action on the board game
- Physical cards is used as “Chance card”, tap on the tablet to trigger some special effects, e.g. thunder storm, or other unexpected accidents in life.
- Note: User can still play the game simply using fingers, without any props



Physical token sample



Physical card sample

(2) Need Analysis – Customer Interaction

3) Viral in SNS

- Apart from the standard analysis result and chart, an illustration with the tailor-made avatar and simple result will be generated, which can be emailed to customer as a “souvenir”.
- Agents can invite customers to share and viral in SNS.

