

# Portfolio

Huan Chen 陈欢

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# About me

- Master of computer science with specialization in HCI
- Experienced in designing both consumer products and enterprise products
- Experienced in designing for web and mobile device.
- Skilled in research and design both
- Speak English fluently

# My skillset

## Research

- Interview
- Questionnaire
- Field study
- Usability testing
- Persona

## Design

- Interaction design
- Information architecture
- Prototyping

## Front-end dev

- HTML & CSS
- JavaScript

## Methodology

- Agile
- Scrum
- Lean UX
- User centered design

# Case study

# Call management System for after-sell

I designed a call management system from ground for after-sell service team.



# Project brief

## Overview

It is a system we developed for after-sell service team to manage customer's profile related to after sell service/product such as insurance

## Time

2018.12

## Team

Huan Chen (me) - business analysis, user research, UI design

Yan Gao - product management

# We started by analyzing users and stakeholders

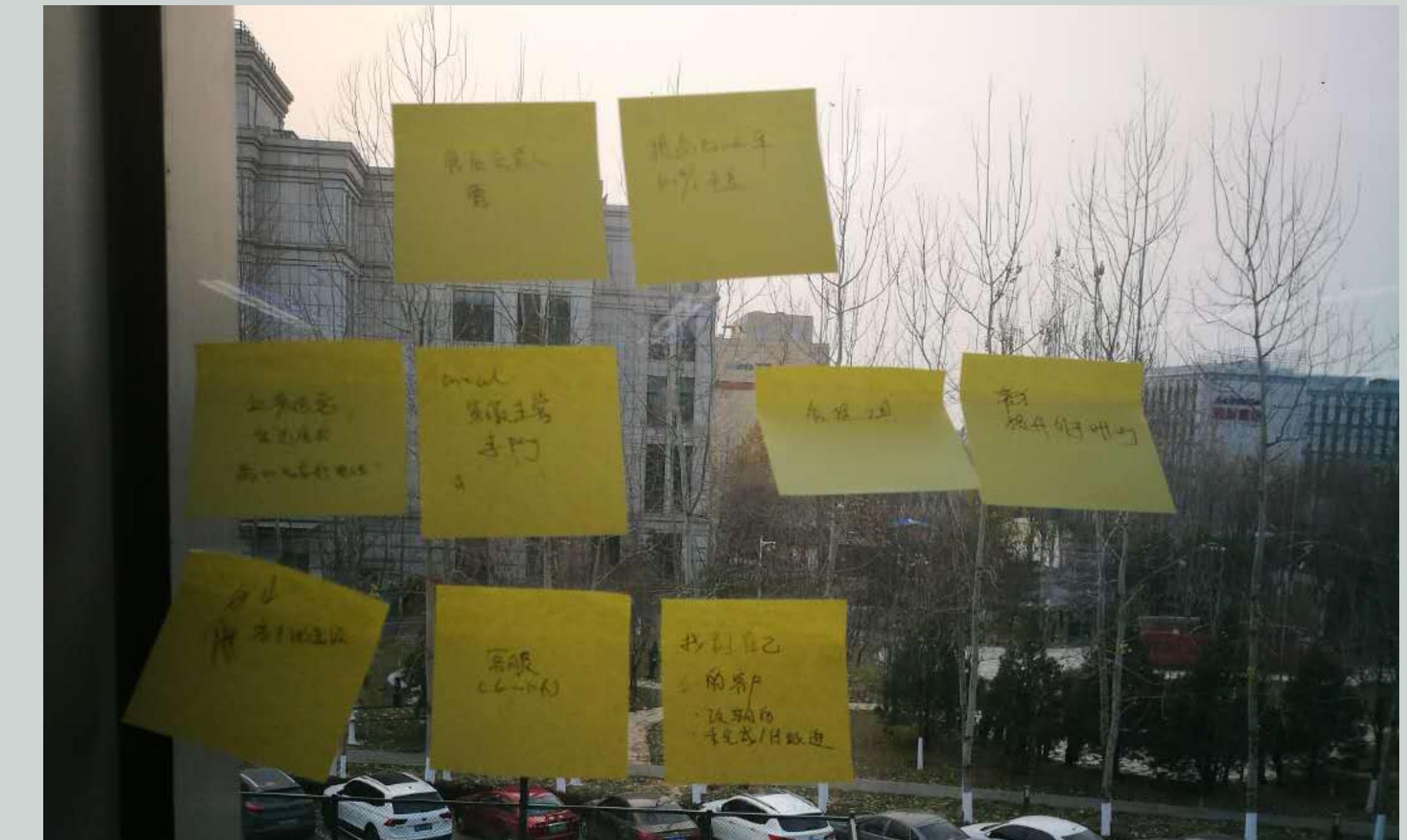
It is a system **designed from scratch**, so it is important to know the stakeholders at the beginning.

**After sale manager**-caring about performance data

**Business operators**- defining the business rules, such as “contacting a customer 60 days before policy ends”.

**Call center manager**- managing the workers, **end user**

**Call center staff** - the ones who call the customer, **end user**



We collected the **business goals** the product need to help the team to reach

The high-level goals of the product should reach are:

- A customer is served by **only one staff** all the time.
- A staff can resolve **multiple cases** by **one call**

We define the **goals of users** in order to specify the use cases for the system later.

User group	Goals
Manager	Assign cases to staffs
Staffs	Resolve the cases

# We defined our design principles

We defined our design principles according to the **feature of enterprise system, goal of design and needs of the organization.**

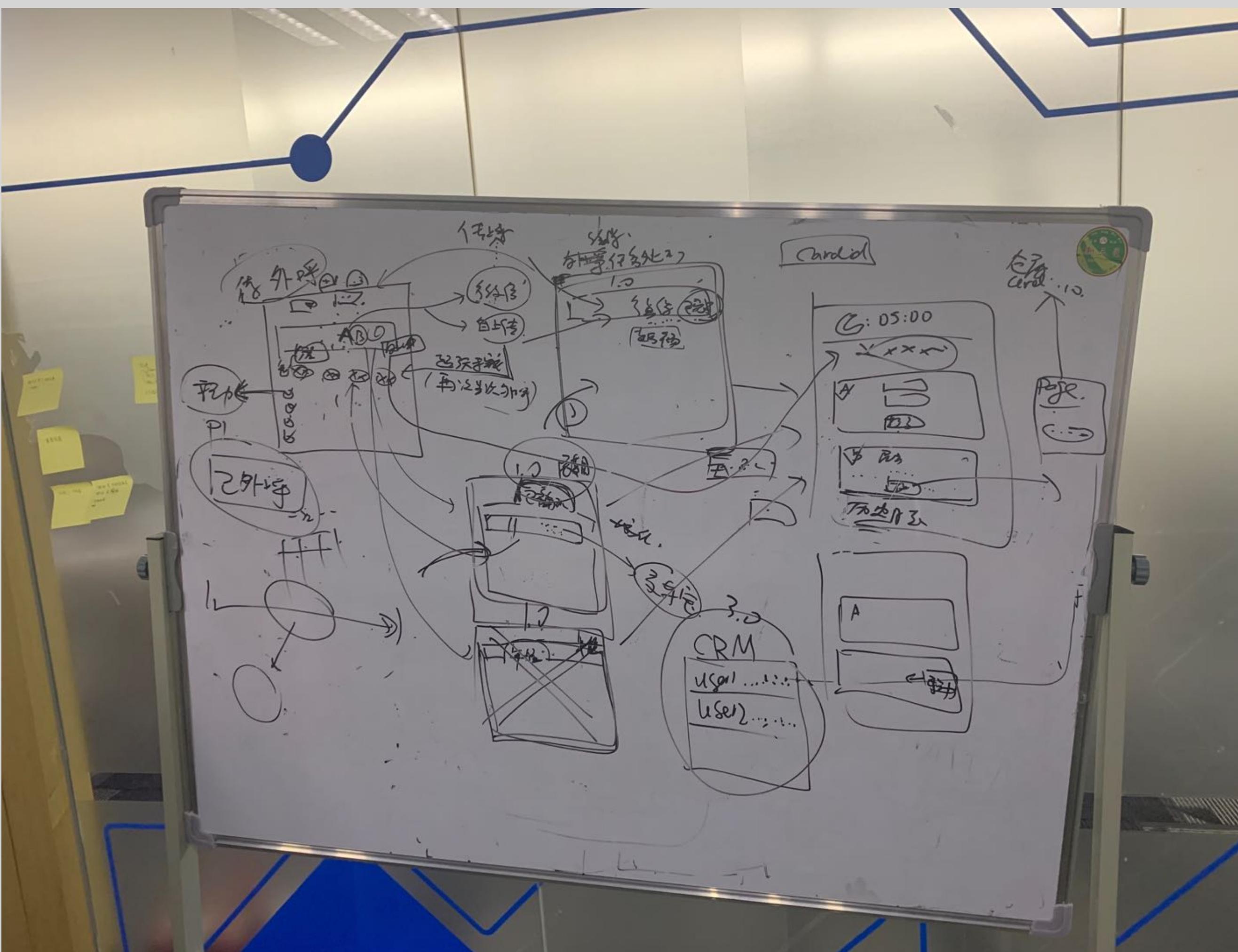
**User adaption-** the system should adapt user's working habit and mental modal

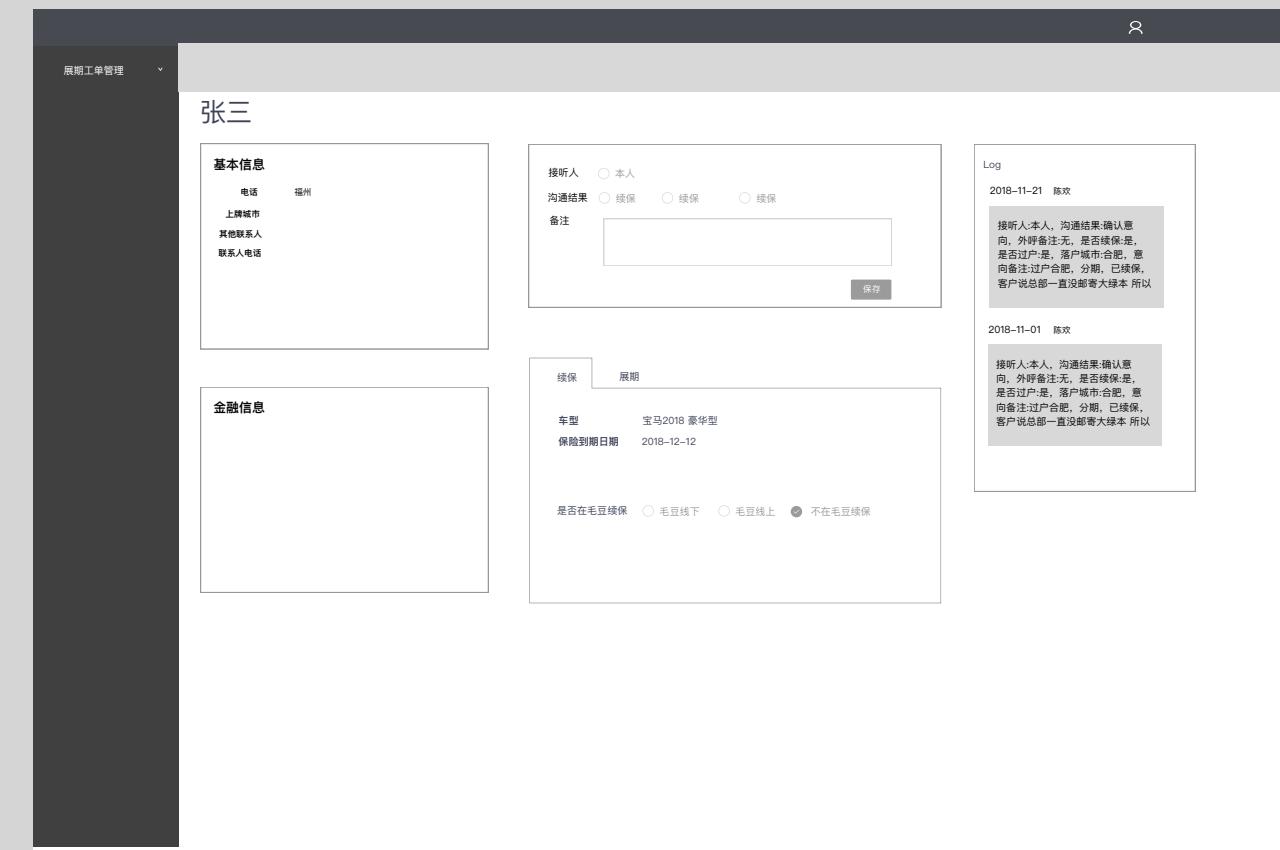
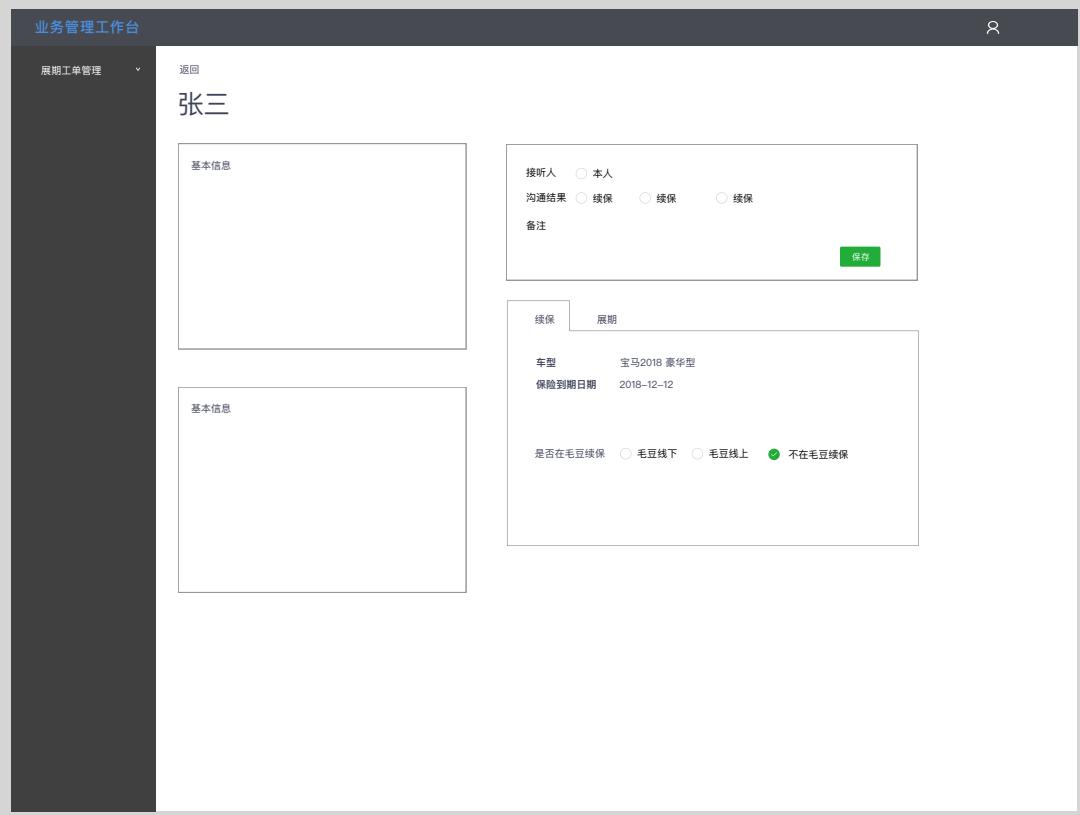
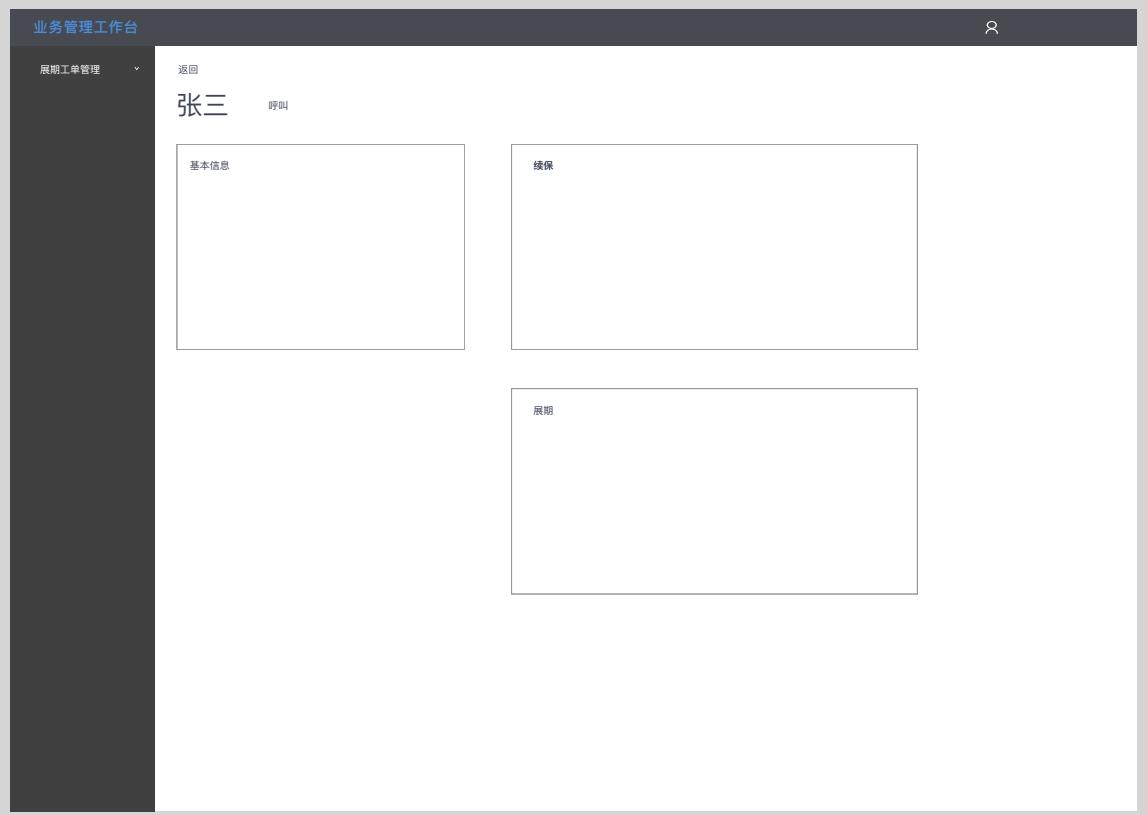
**Business impact-**the system should help to collect important business data

**Scalability-** the system can be enlarged for other business cases in future

**Efficiency-**user can work efficiently while making the phone call

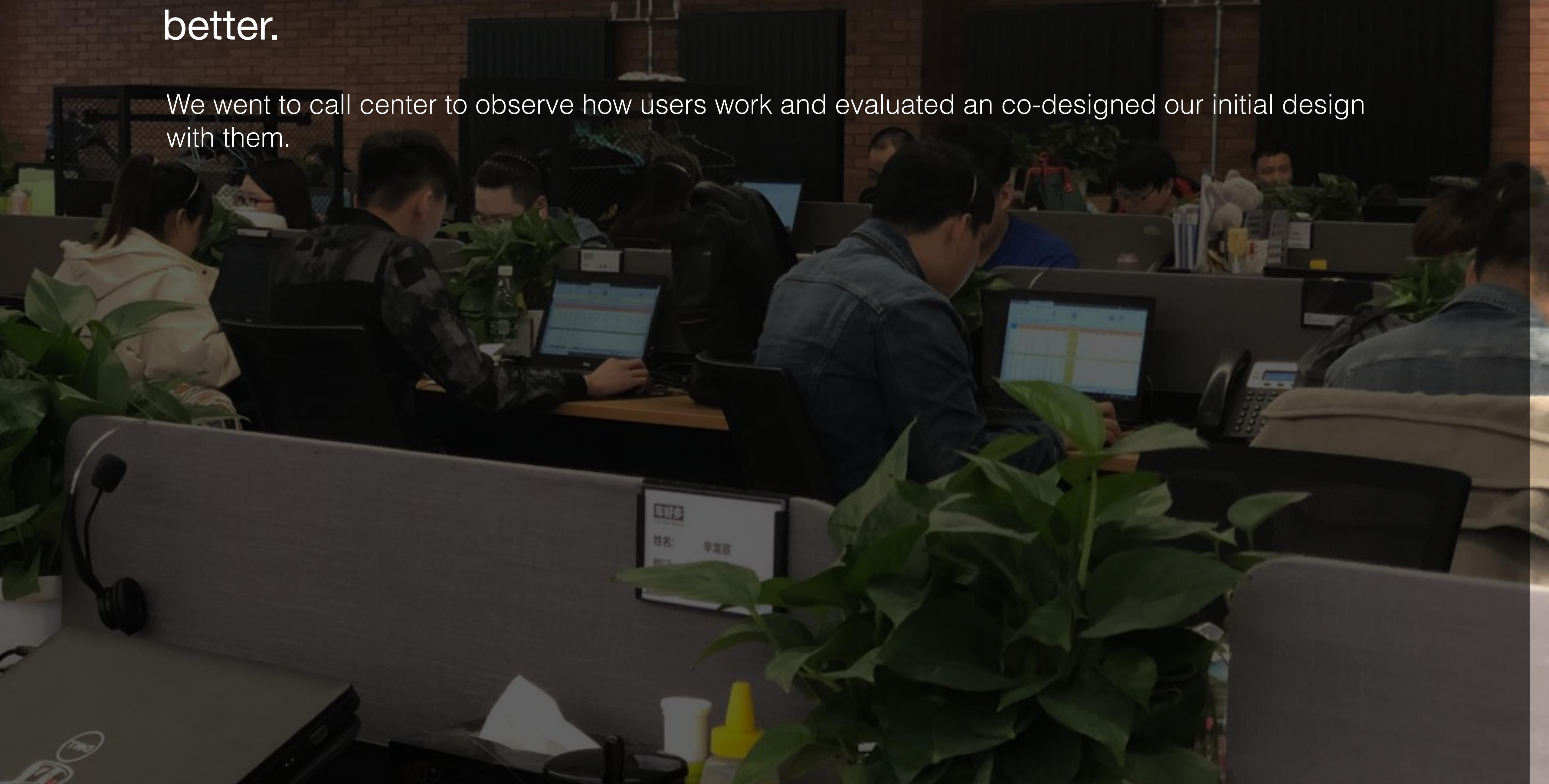
We ideated solutions with our principles in mind on whiteboard and with wireframes.





# We took a field study for understand the users and business better.

We went to call center to observe how users work and evaluated an co-designed our initial design with them.



# We observed how users work.

We observed how users actually work, took records of their dialogues with customers and behavior and analyzed their behavior pattern.

## 对话1

客服：你好，我这回是毛豆新车往的客服，你是……是吗。你好，你去年有在我们这购买[ ]我送了一年车险，还有20天到期。

客户：这个月24号？

客服：这个车险你办了吗？

客户：|我不知道，还没问呢

客服：那这样吧，我们加一下微信

客户：我到期还可以续吗？我不可以自己买吗？

客服：可以，自己买价格高一点。

那我让续保专员加一下微信吧。

If the customer hasn't renew the insurance



Mark as “in process”

# We designed together with users

We observed how users actually work, took records of their dialogues with customers and behavior and analyzed their behavior pattern.

是否在毛豆续保  毛豆线下  毛豆线上  不在毛豆续保

## Iteration 1



打算如何续保  未续保,  未续保,  未续保, 不在毛豆续保  未续保, 但是没有决定在哪续  未续保,  已续保  
打算毛豆  
线上续  
打算毛豆  
线下

## Iteration 2



续保情况  续保进行中  已完成续保 (在毛豆)  已完成续保 (在其他地方)  未沟通  
 在毛豆线上续  在毛豆线下续  不确定  自己办理  不打算续保

## Iteration 3

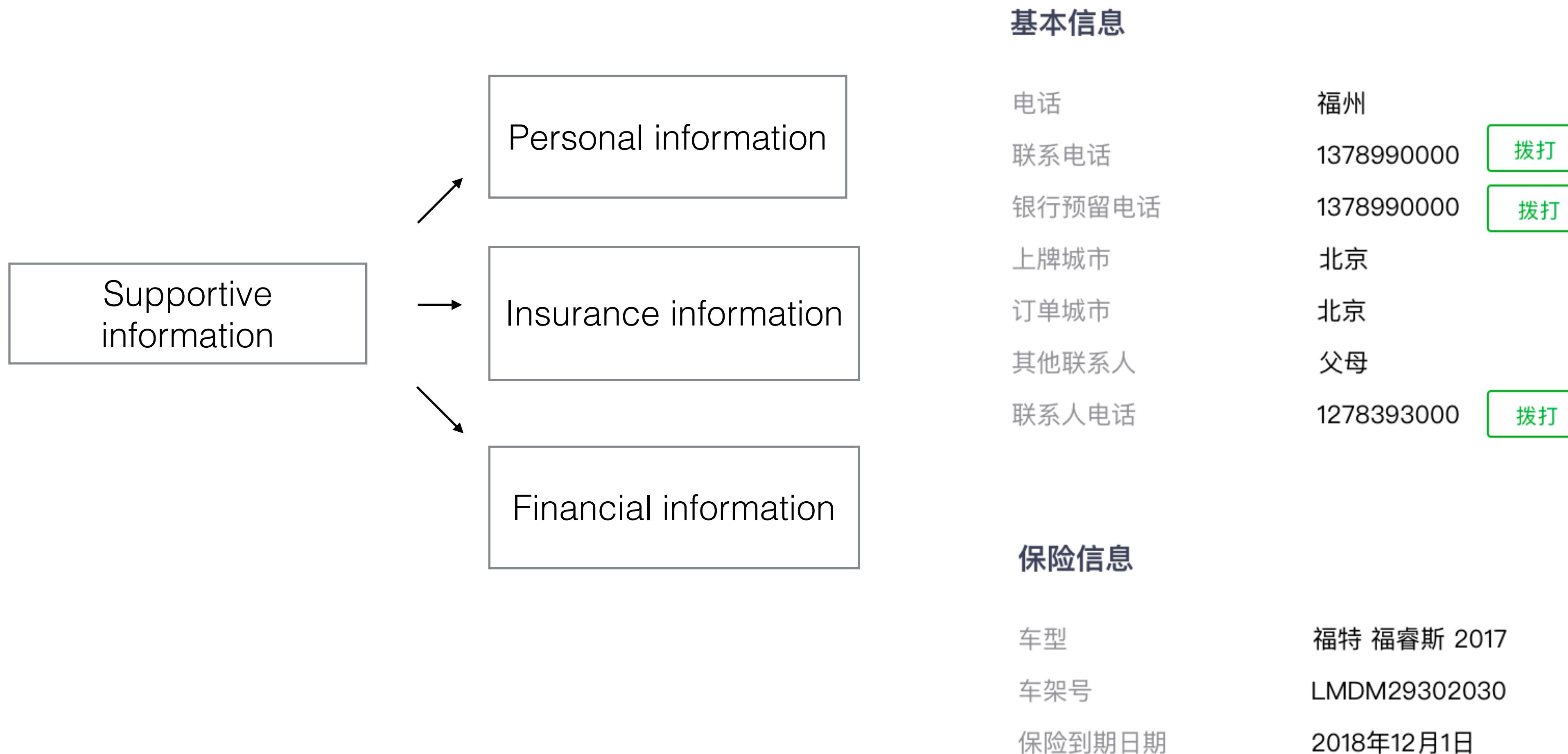
\*设置跟进时间

确定

取消

# I also optimized the information design

Humans can process approximately 7 “chunks” of information at a time. I divided the supportive information into several segments. Each of them contains no more than 7 attributes of information.



# A screen of final design of workstation

保存

### 李明

**基本信息**

电话	福州
联系电话	1378990000 <span>拨打</span>
银行预留电话	1378990000 <span>拨打</span>
上牌城市	北京
订单城市	北京
其他联系人	父母
联系人电话	1278393000 <span>拨打</span>

**保险信息**

车型	福特 福睿斯 2017
车架号	LMDM29302030
保险到期日期	2018年12月1日
续保工单状态	待上传保单

**金融信息**

第 12 期还款日期	2018年12月1日 00:00:00
前 12 期每月展期金额	1000
后 36 月每月展期金额	1000
一次性结清金额	1000
总逾期金额	1000
还款状态	未结清

**辅助信息**

展期优惠券	2000
GPS 状态	是
违章分数	无
违章金额	无

是否本人接听

添加

### 续保

**续保情况**

续保进行中  已完成续保 (在毛豆)  已完成续保 (在其他地方)  未沟通

### 展期

**是否展期**

是  否  未沟通

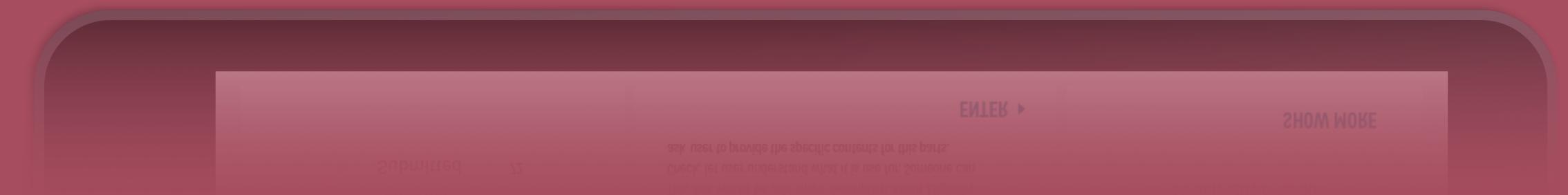
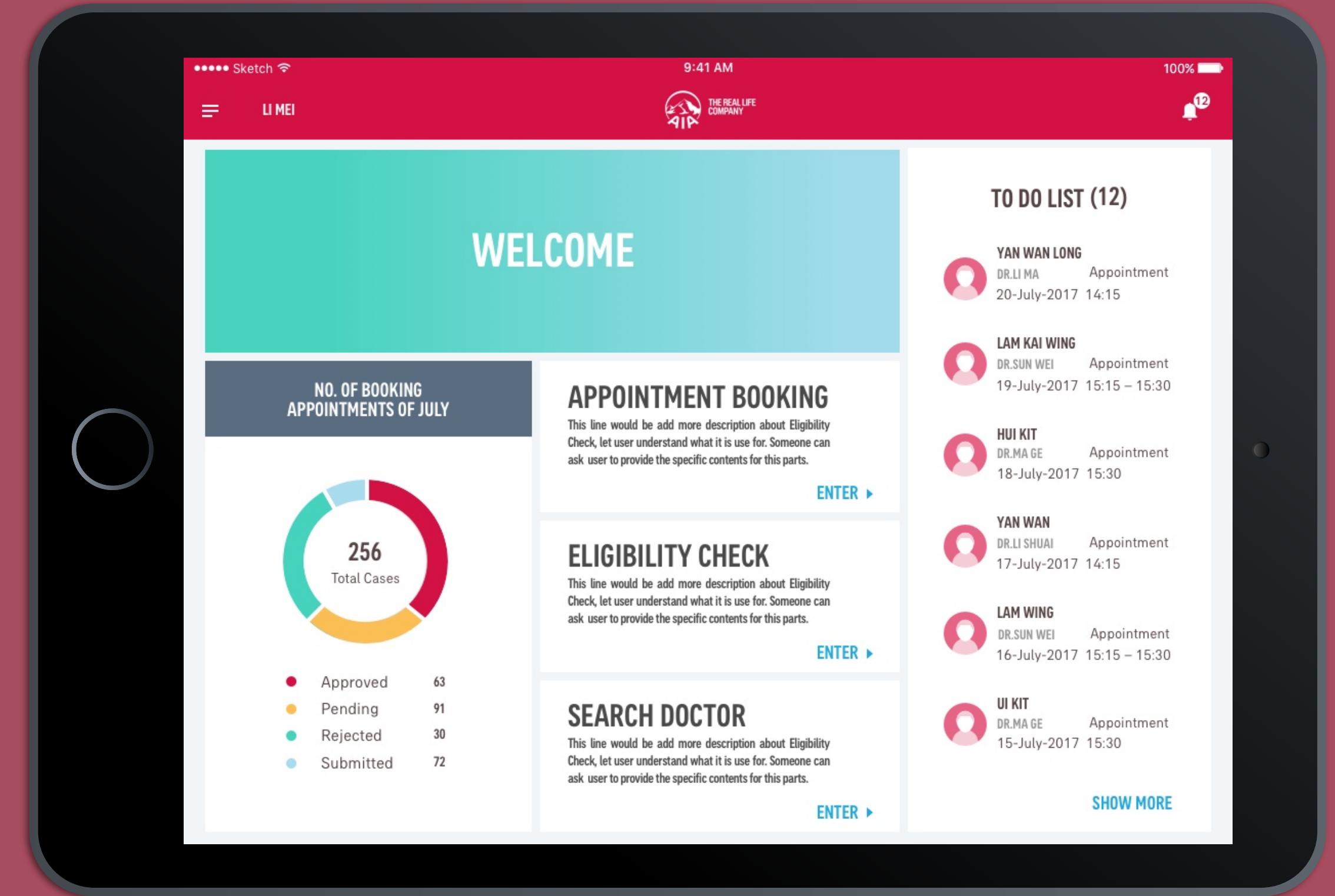
**记录**

2018-11-01 19:30:01	陈欢
本人	客户说总部一直没邮寄大绿本
	所以无法过户 12.3号暂住证
	就到期了, 催尽快处理
2018-11-01 19:30:01	陈欢
非本人	过2天再打
2018-11-01 19:30:01	陈欢
未接通	
2018-11-01 19:30:01	陈欢
通话时长 02分19秒	
2018-11-01 19:30:01	陈欢
通话时长 02分19秒	

# Medical insurance management system for AIA



We collaborated with business analysts from AIA HongKong office to design a system for process medical insurance with clinics.



# Project brief

## Overview

AIA HongKong intent to build a system for local clinics to manage the appointment booking and money transaction for AIA customer. As members of AIA design center, we needed to deliver a conceptual solution for AIA HongKong.

## Time

2017.12

## Team

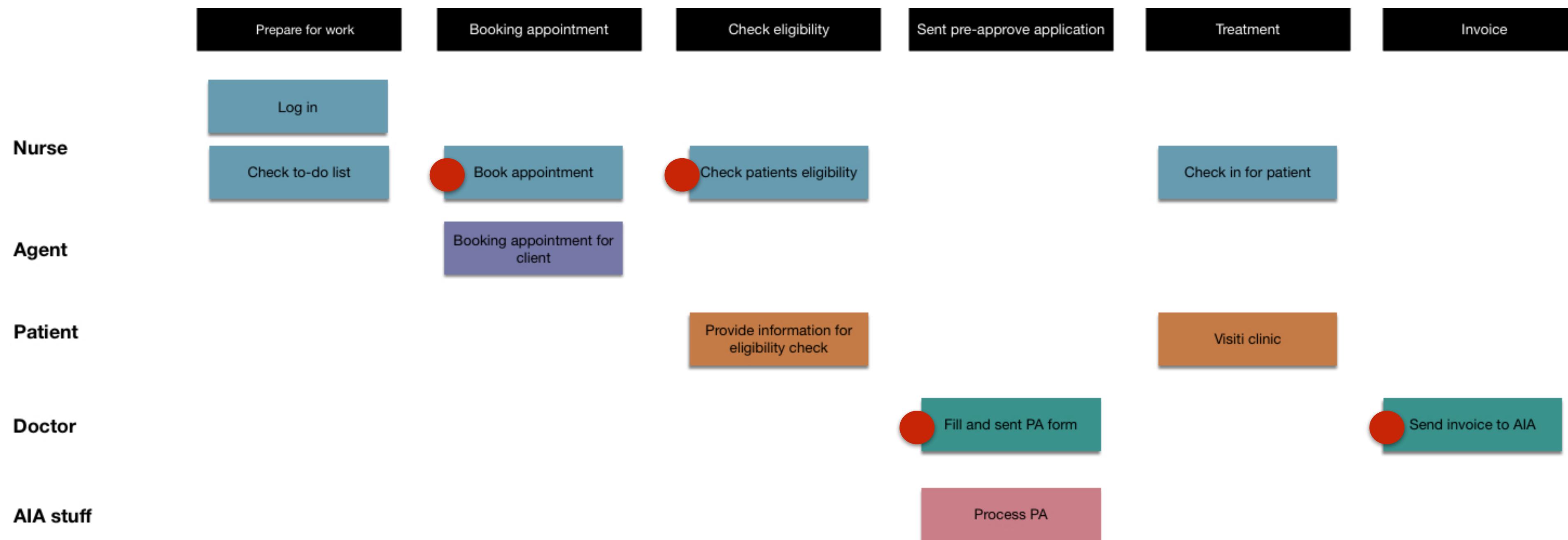
**Huan Chen - business analysis, user research, UI design, reporting**

Ada zhang - UI design, visual design

Shawn zhang - UI design, user research, reporting

# The business case

In this project, we designed for business process related to **appointment booking**, **eligibility checking**, **pre-approve form** and **invoice management**.

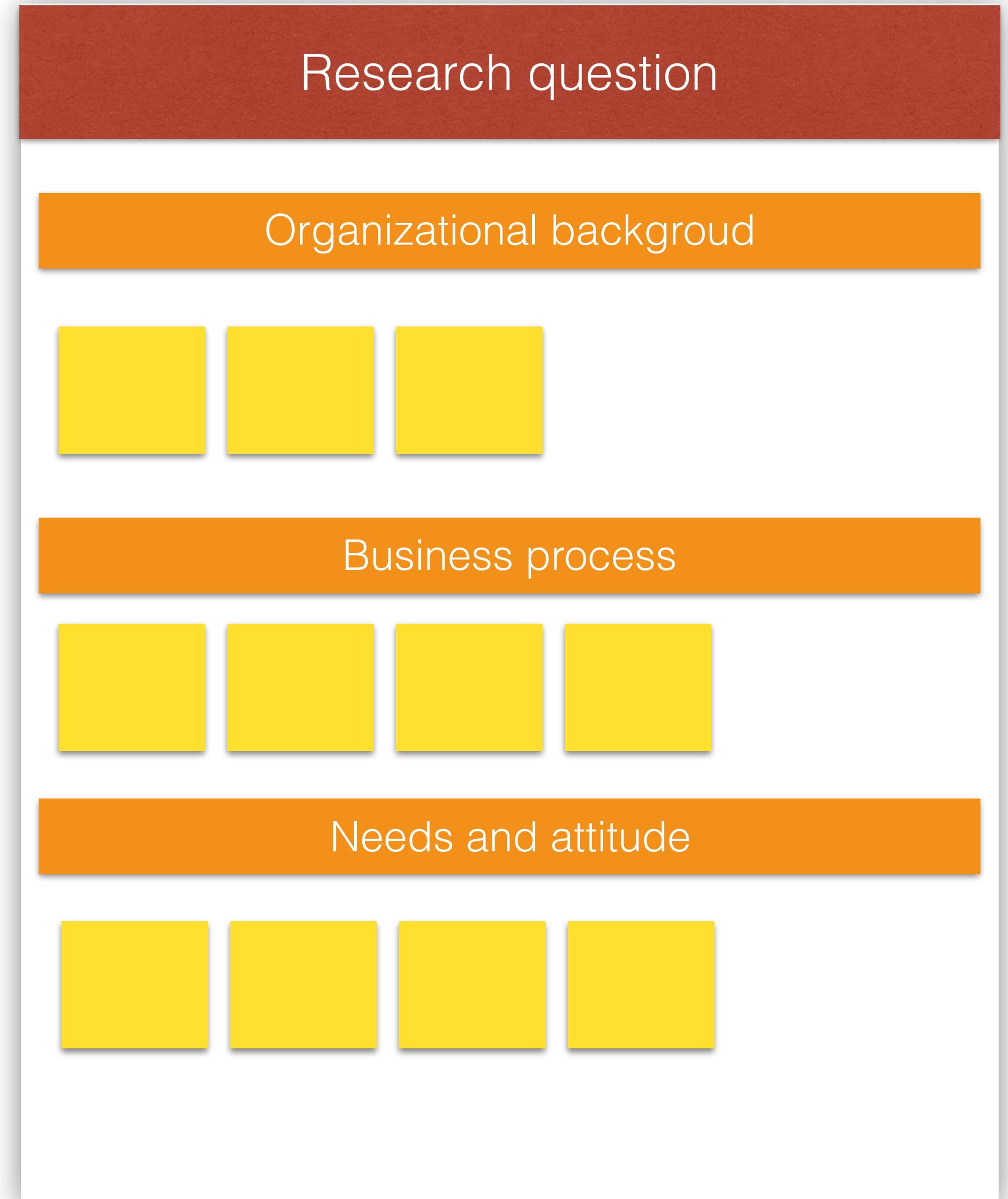


# User interview

I designed **four different questionnaires** for **doctor, nurse, agent and AIA stuff**.

Our interviews aim to reach following objectives:

- **Understand how a doctor/nurse/operator/AIA works**
- **Understand how a clinic works**
- **Discover doctor and nurse's motivation and needs in using AIA's system**
- **Explore how a new system can be integrated into clinics**
- **Gather information to our concerns towards the current design of system**

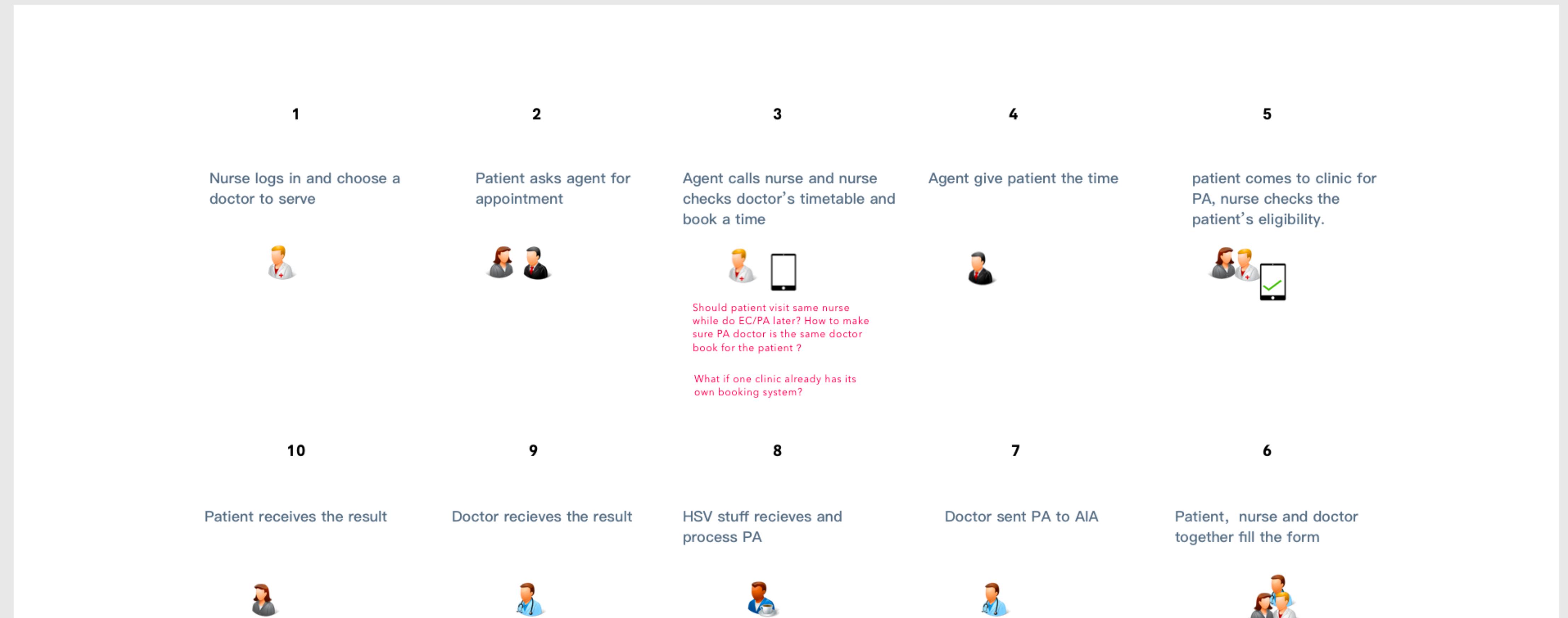


# Interview worksheet

Agent				
Participant name				
Location				
Moderator				
Photographer				
<b>Participant Background</b>				
Age		Gender		
Years of working				
Topic	Participant quote	Interpretation	Design consideration	
Work in general				
Appointment booking				
Needs/motivation/attitude				

# User scenario mapping

We mapped the user scenario with our findings and identified features/service the system should offer or issues to be discussed.



## IDEATION

# Iterative design process

We designed and evaluate iteratively with focus on efficiency.

**APPOINTMENT BOOKING**

**FIND A DOCTOR**

Doctor Specialty: General  
Preferred Clinic Location: Kowloon  
Preferred Doctor: Lam Chi Wan

SEARCH

SELECT	DOCTOR NAME	PORTAL Dr	DISTRICT	MEMBER COVERAGE	DOCTOR GENDER
<input checked="" type="checkbox"/>	DR. LAM CHI WAN	Y	Kowloon	SGH	Male
<input type="checkbox"/>	DR. CHI KEE	N	Kowloon	CEO	Female
<input type="checkbox"/>	DR. LUI WAN	N	Kowloon	CEO/SGH	Male
<input type="checkbox"/>	DR. CHI WAN	Y	Kowloon	SGH	Male
<input type="checkbox"/>	DR. LUE KEE	Y	Kowloon	SGH	Male
<input type="checkbox"/>	DR. ZHANG KUE	N	Kowloon	CEO/SGH	Female
<input type="checkbox"/>	DR. GUO FU	N	Kowloon	CEO	Male
<input type="checkbox"/>	DR. CHI WAN	Y	Kowloon	SGH	Female
<input type="checkbox"/>	DR. TEE KEE	Y	Kowloon	SGH	Female

1 / 17 > Jump to  BACK NEXT

**APPOINTMENT BOOKING**

**FIND A DOCTOR**

CHOOSE AVAILABLE TIME FOR PATIENT

12/10/2017 TODAY >

12/12/2017	12/13/2017	12/14/2017	12/15/2017	12/16/2017
------------	------------	------------	------------	------------

SEARCH

**APPOINTMENT BOOKING**

**FIND A DOCTOR**

CHOOSE A TIME

14/12/2017 >

12/12/2017	12/13/2017	12/14/2017	12/15/2017	12/16/2017
------------	------------	------------	------------	------------

All gender >

Lam Chi Wan  
Hong Kong Island  
M

Lee Emily  
Hong Kong Island  
F

Wong Peter  
Hong Kong Island  
M

09:00	11:00	14:00	
09:00	10:00	11:00	15:00
09:00			

**APPOINTMENT BOOKING**

**FIND A DOCTOR**

Need to find a doctor  
Have a doctor in mind

Doctor Specialty: General  
Preferred Clinic Location: All  
Medical Plan: CEO

SEARCH

12/12/2017 >

12/12/2017	12/13/2017	12/14/2017	12/15/2017	12/16/2017
------------	------------	------------	------------	------------

All gender >

Lam Chi Wan  
Hong Kong Island  
M

Lee Emily  
Hong Kong Island  
F

Wong Peter  
Hong Kong Island  
M

09:00	11:00	14:00	
09:00	10:00	11:00	15:00
09:00			

NEXT

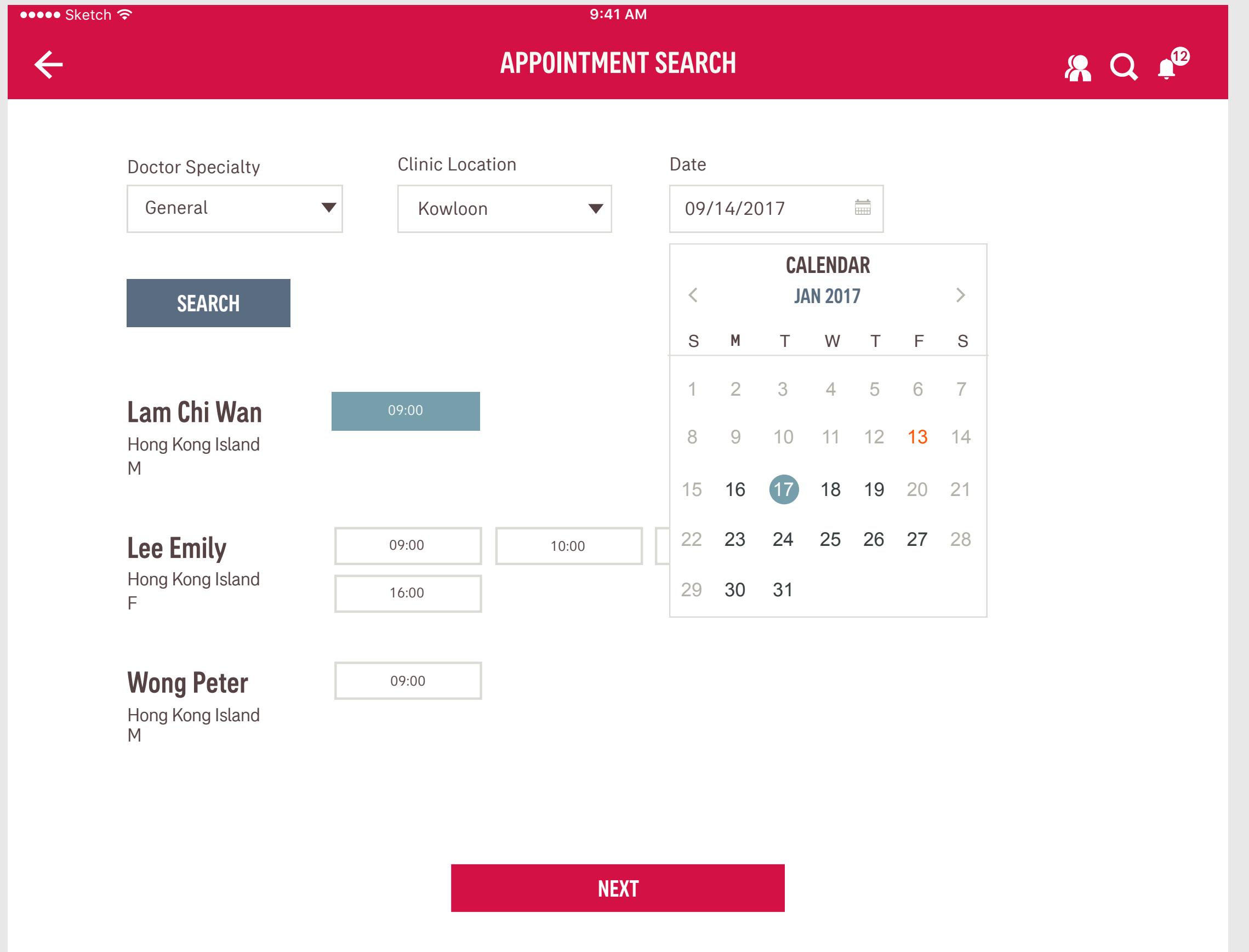
Iteration 1

Iteration 2

Iteration 3

## SOLUTION

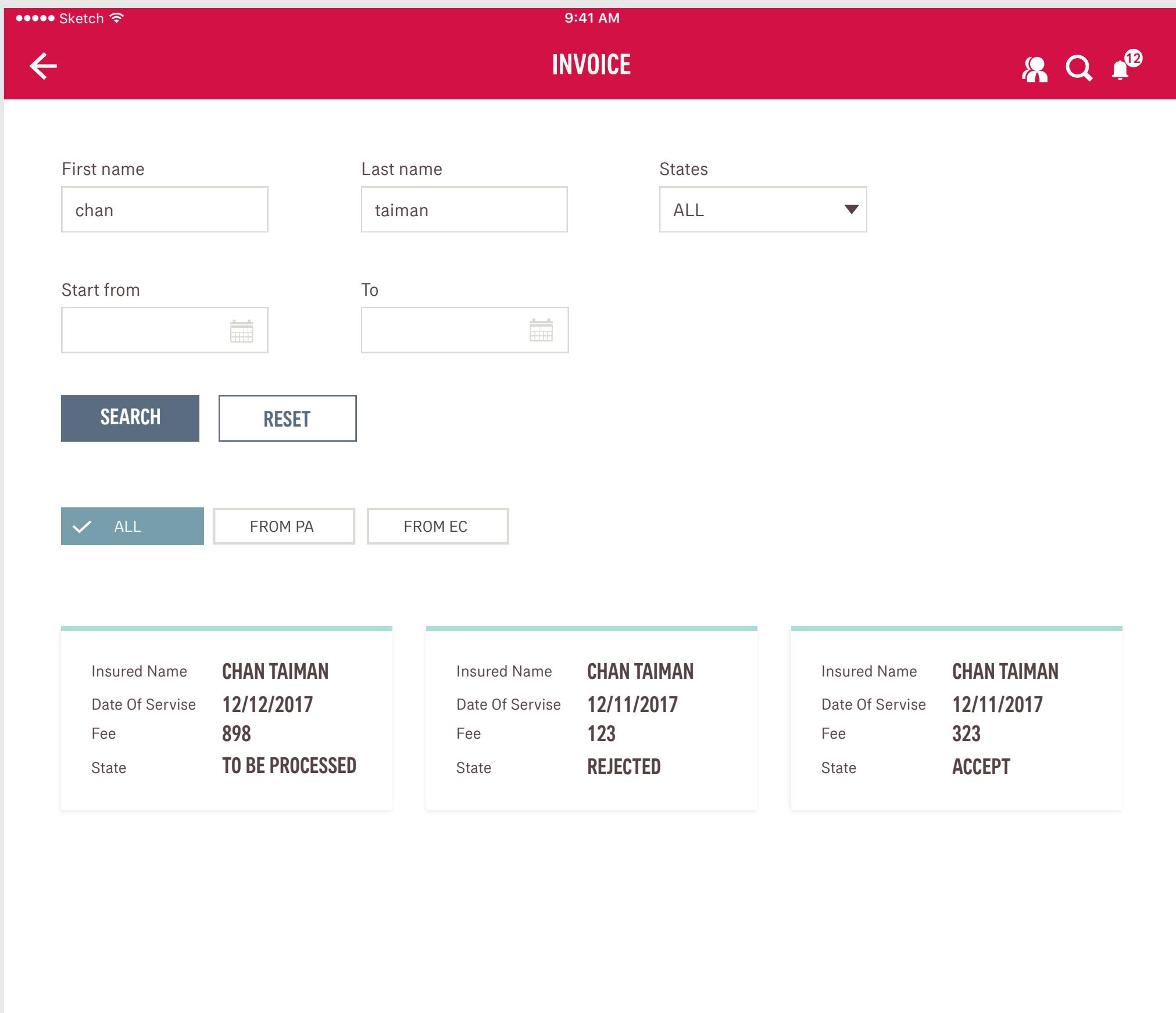
# Doctor appointment booking



The image shows a mobile application interface for 'APPOINTMENT SEARCH'. At the top, there is a red header bar with the title 'APPOINTMENT SEARCH' in white. Below the header are three input fields: 'Doctor Specialty' (set to 'General'), 'Clinic Location' (set to 'Kowloon'), and a 'Date' selector showing '09/14/2017'. A 'SEARCH' button is located below these fields. The main content area displays three doctors with their availability: 'Lam Chi Wan' (Hong Kong Island, M) is available at 09:00; 'Lee Emily' (Hong Kong Island, F) is available at 09:00, 10:00, and 16:00; and 'Wong Peter' (Hong Kong Island, M) is available at 09:00. To the right of the doctor names is a 'CALENDAR' for 'JAN 2017' showing the days of the week (S, M, T, W, T, F, S) and the dates 1 through 31. The date '17' is highlighted with a blue circle, indicating it is the current day or a selected date.

User can switch between days and see all available time of available doctors in one page.

## SOLUTION



A Sketch wireframe of a mobile application interface titled 'INVOICE'. The top navigation bar is red with the title 'INVOICE' in white. The search bar contains fields for 'First name' (chan), 'Last name' (taiman), and 'States' (ALL). Below the search bar are date range fields 'Start from' and 'To' with calendar icons. There are 'SEARCH' and 'RESET' buttons. Below these are three filter buttons: 'ALL' (selected, teal background), 'FROM PA', and 'FROM EC'. The main content area displays three cards, each representing an insured entry. Each card has columns for Insured Name (CHAN TAIMAN), Date Of Service, Fee, and State. The first card's state is 'TO BE PROCESSED'. The second card's state is 'REJECTED'. The third card's state is 'ACCEPT'.

Insured Name	Date Of Service	Fee	State
CHAN TAIMAN	12/12/2017	898	TO BE PROCESSED
CHAN TAIMAN	12/11/2017	123	REJECTED
CHAN TAIMAN	12/11/2017	323	ACCEPT

# Invoice management

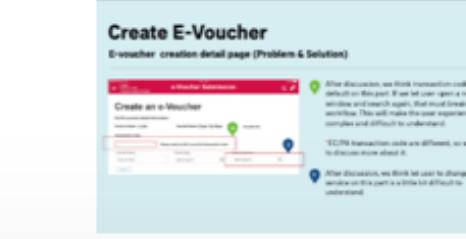
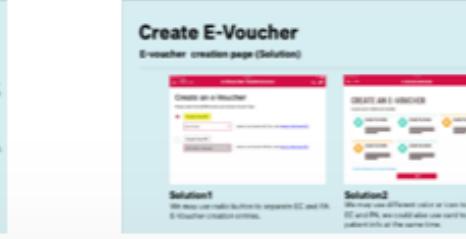
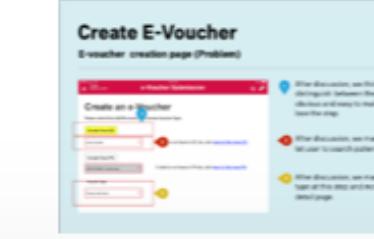
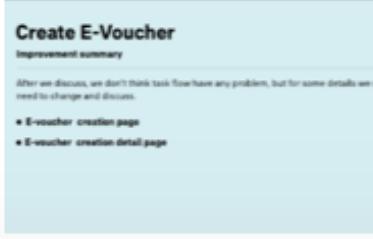
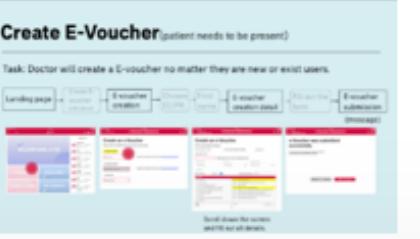
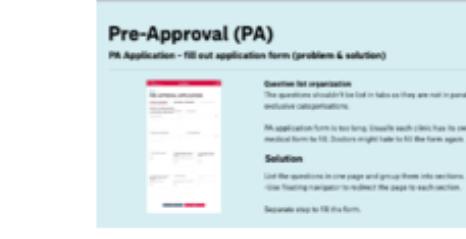
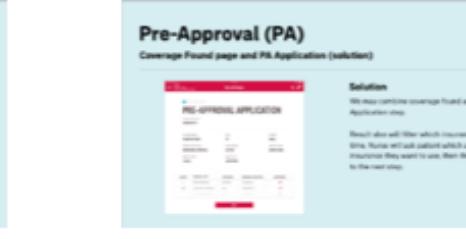
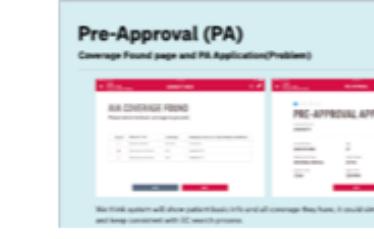
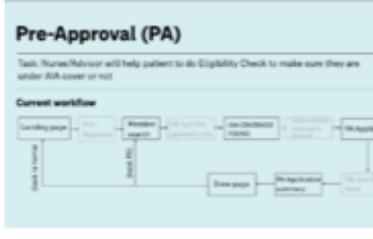
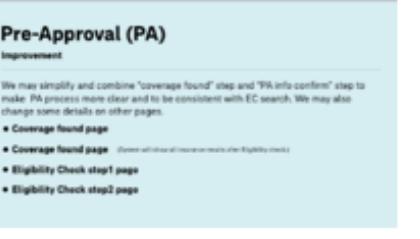
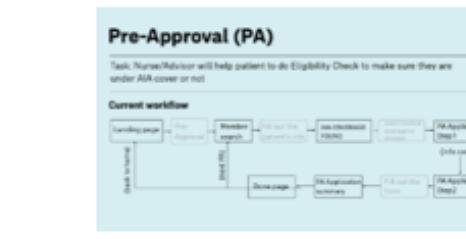
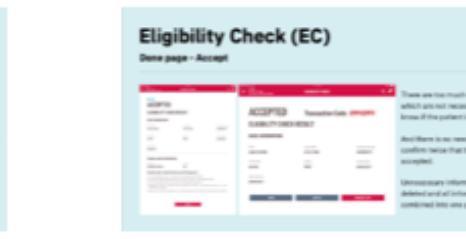
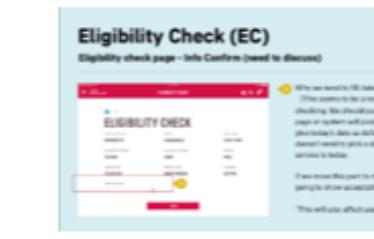
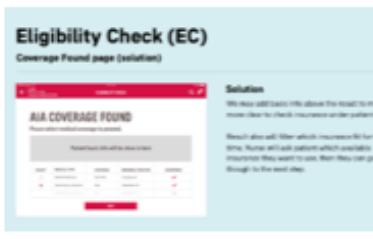
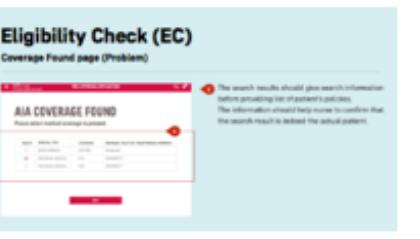
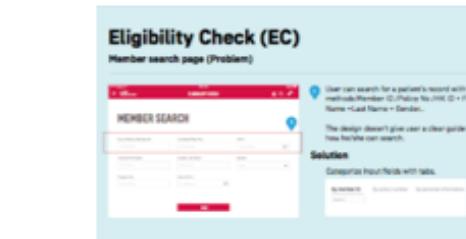
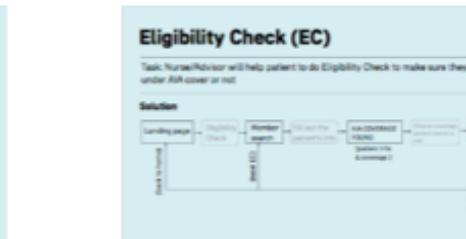
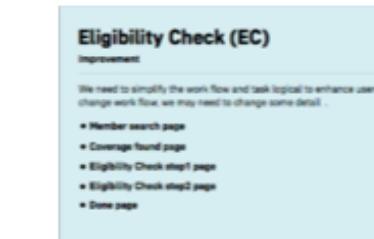
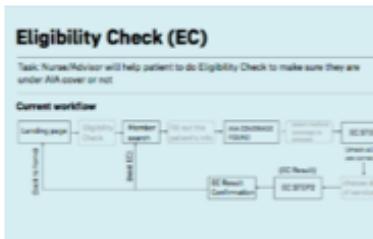
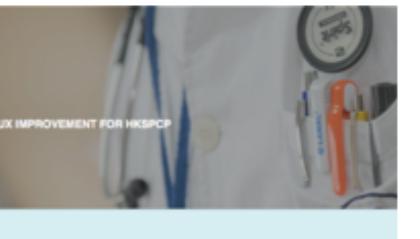
User can browser and filter invoices from different status and sources.

We designed card layout because it has better scalability and adaptable to different screen size.

## THE SOLUTION

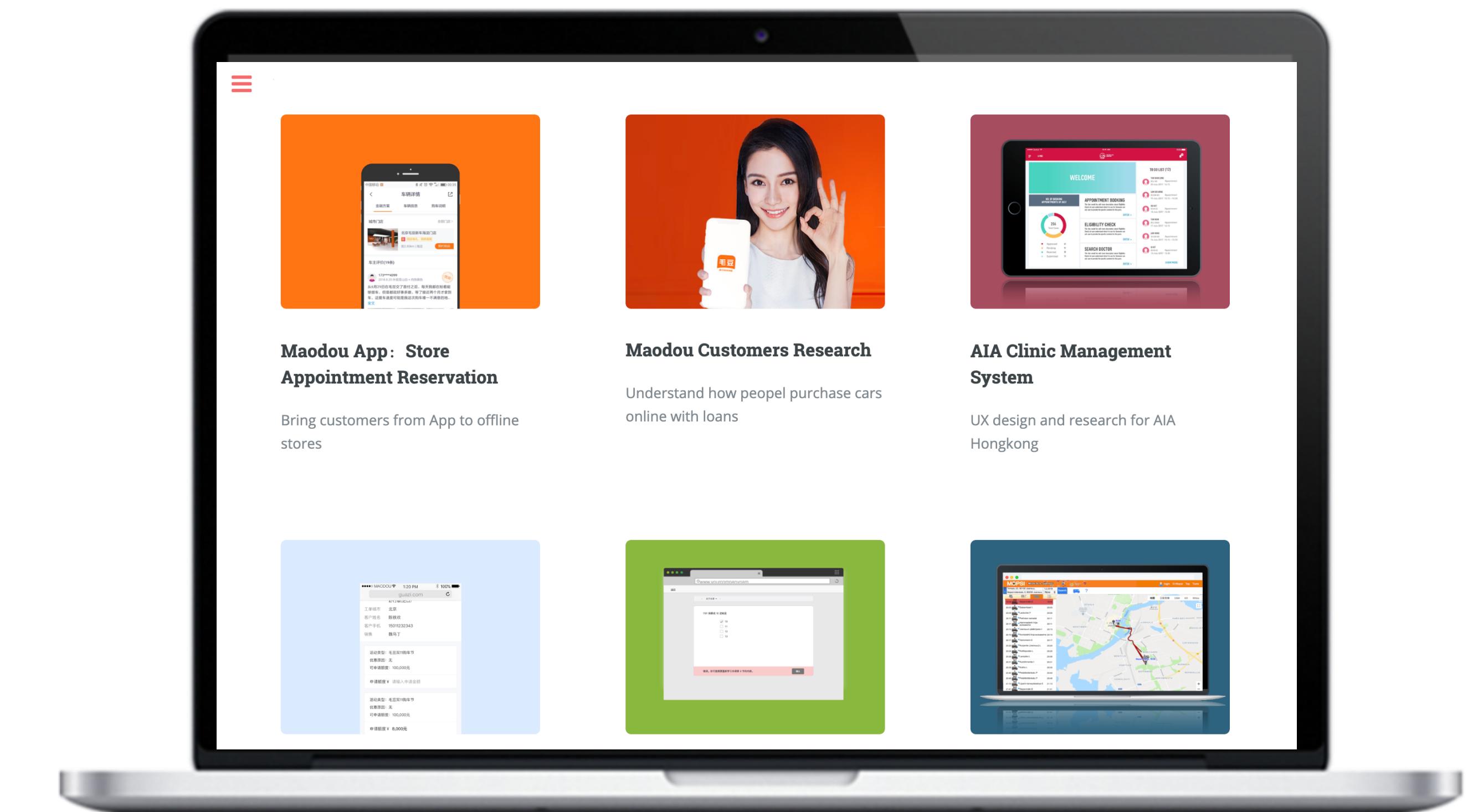
# UX REPORT

Our solutions and recommendations were documented and delivered.



## More projects

[https://huanch.github.io/portfolio\\_en.html](https://huanch.github.io/portfolio_en.html)



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