**CNCBI**

* **Project Name:** **MVP1 of Digital Engagement Platform(DEP)**
* **Department/ user collaborate: Business Insight & Planning, Personal and Business Banking Group**
* **Process:**

Joined the squad team midway through the project and served as the project manager, collaborating with IT and vendors on MVP1.

Negotiated with IT to manage the project budget and optimize costs.

Provided user feedback to the vendor to refine the solution.

Developed SMS, eDM, PM, and PN use cases on the platform, enabling the roll-out of the NTB customer journey.

· **Achievements:**

1. **Quickly adapted to the project, ensuring completion on time without frequent change requests.**
2. **Maintained project costs within the allocated budget.**
3. **Successfully launched NTB customer journey use cases as scheduled.**
4. **Achieved a vendor cost saving of at least $500,000.**
5. **Contributed to the team's success in winning the Best CNCBI 2022, CAHK Star Award 2023 - Best Fintech Silver Award, and The Asian Banker Hong Kong Excellence in Retail Finance and Technology Innovation Awards 2024.**

* **Project Name:** **Enabling Next-Best-Action Model Framework on Digital Engagement Platform**
* **Department/ user collaborate: Business Insight & Planning, Personal and Business Banking Group**
* **Process:**

Led the development of the NBA model and the test-and-learn framework for the Digital Engagement Platform.

Built product-level propensity models and managed AI governance procedures.

Monitored model performance and provided business users with analytical insights.

Established model retraining standards.

Developed a standardized model development framework for junior team members.

Created Auto-ML packages for team members without a data science background.

Provided model lists for campaign use cases.

* **Achievements:**

1. **Streamlined the time spent on campaign criteria design and development.**
2. **Successfully integrated NBA models and test-and-learn frameworks with the Pega Platform.**
3. **Introduced the AI + BI model delivery framework to standardize outputs.**
4. **Enabled precise targeting of retail banking marketing campaigns using AI technologies..**
5. **Achieved a 1.5x uplift in most models compared to control groups.**

**AXA**

* **Project Name:** **Go-Green Home Insurance Product**
* **Department/ user collaborate: General insurance**
* **Process:**

Served as a solution partner, providing an end-to-end data science solution for an ESG-related home insurance product.

Engaged with the Chief Underwriting Officer and team heads to understand business needs.

Worked closely with product, claims, underwriting, and pricing teams to design and develop Hong Kong’s first ESG home insurance campaign.

Leveraged data science technology to link ESG concepts with home insurance offerings.

Conducted research on climate change's impact on home insurance claims and innovative use cases from North America.

Developed a GLM model to perform hypothesis testing, identifying correlations between government public databases and home insurance data.

Built a LightGBM model to predict claim risk for individual home insurance policies.

Proposed strategic initiatives based on case studies.

Collaborated with the product and marketing teams to design a campaign.

* **Achievements:**

1. **Successfully launched Hong Kong’s first ESG home insurance campaign.**
2. **Improved the home insurance severity model by 5%.**
3. **Achieved 1k+ customer responses, showcasing the campaign as a success at the AXA Global Data Science Summit.**
4. **Contributed to winning multiple awards, including: 2021 ONE AXA Award - Silver Award (Second Place Finalist), HKB Technology Excellence Awards 2022 - Big Data Insurance**

* **Project Name:** **Prospect Customer Database**
* **Department/ user collaborate: All Digital, Sales and marketing teams**
* **Process:**

Acted as a solution partner, designing and developing a prospect customer database to consolidate customer data from all channels.

Coordinated with digital, sales, and marketing teams to understand customer sources and data structures, including insights from web platforms, Salesforce, and ONE Circle Club.

Designed a data model based on comprehensive research findings.

Developed and implemented data pipelines using Azure Databricks and Synapse.

Applied network theory to identify customers and constructed a robust Customer ID assignment system.

Established retention policies and opt-out/opt-in mechanisms based on the single source of truth principle.

* **Achievements:**

1. **Successfully developed the database independently within four months.**
2. **Created the first prospect customer database within the company.**
3. **Designed a solid Customer ID assignment system, ensuring unique customer identification.**
4. **The database remains widely used in AXA's sales and marketing operations.**