

REQUIREMENT

Ankur sinha

Customer-centric needs analysis tool that helps prospective and current HSBC Customers identify their lifestyle needs and suggest suitable HSBC Insurance products.

KEY CONSIDERATIONS

← → EXPERIENCE ← → STRATEGY →

Humanizing
the experience

Focus on Positive
Empowerment &
Building Trust

Mobile First
Design

Simple
but not generic

Personal
& insightful
results

Intuitive
smart tool

PERSONAS

Anthony Ho

- 32 years old
- Married
- Just became a dad
- Works as a Marketing manager



About him

- Spends a lot of time online and is web savvy
- Spends time researching and analyzing products he buys

Expectations

- He knows he needs to start thinking about insurance but is unsure exactly what he needs
- Looking for expert advice to guide him

Caroline Lim

- 24 years old
- Single
- Works as a HR Executive



About her

- She's a casual, happy-go-lucky kind of person
- Not seriously concerned about the future

Expectations

- She currently doesn't have any insurance currently and realizes that most of her peers at work do
- She wants to learn more and is looking for some guidance

Richard King

- 46 years old, British
- Married lives in Hong Kong with wife & 3 kids
- Moved to Hong Kong from London last year
- Works as Business Development Director



About him

- He is a planner and has everything planned to a tee
- He is focussed and goal oriented and likes being prepared in advance

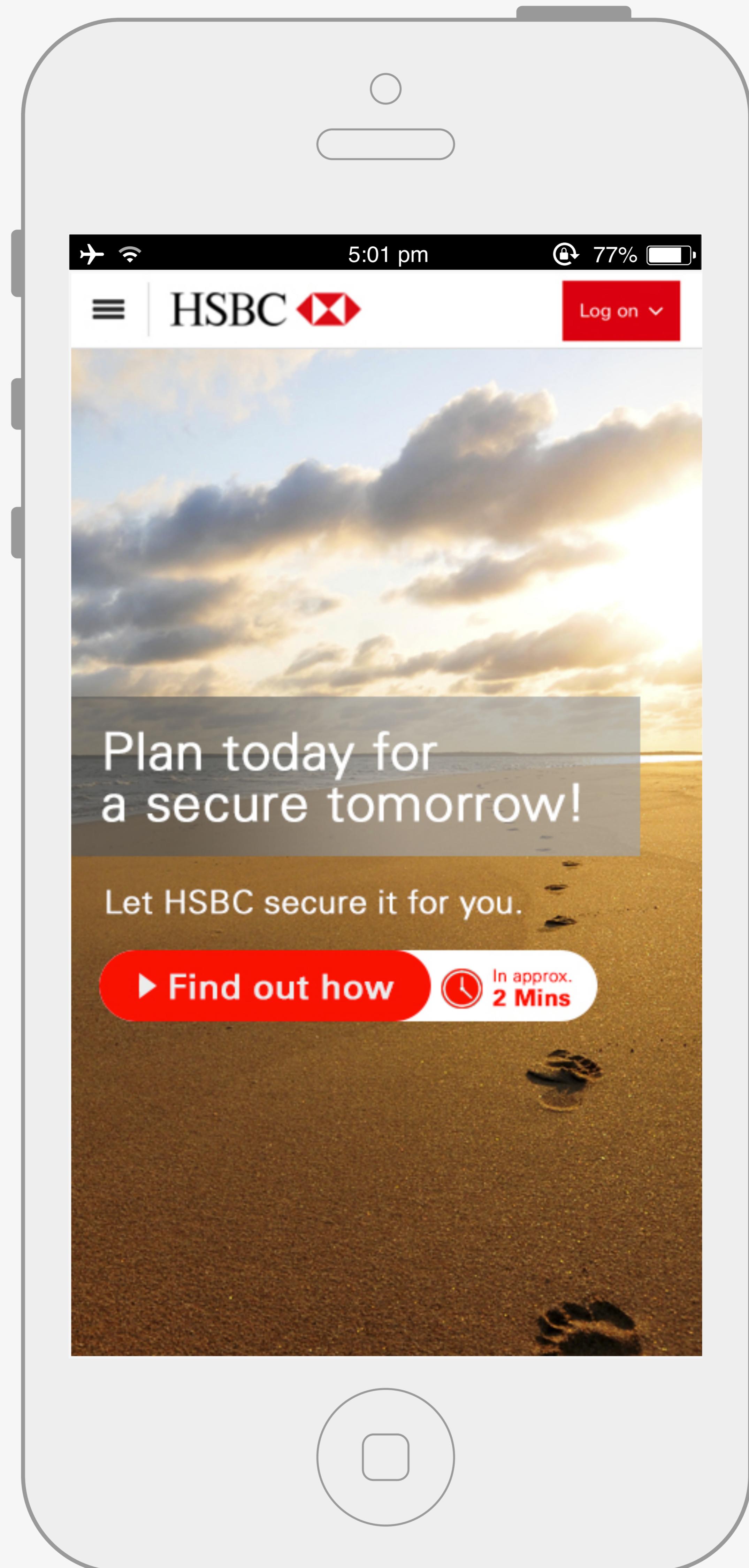
Expectations

- He has some insurance for him and his family but wants to ensure that he is adequately protected
- Looking for reconfirmation

WIREFRAMES - APPROACH 1

Life Stages / Life Situations / Results

- 5 Steps
- Linear, Structured Approach
- Question & Answer Format



ANNOTATIONS

- 1 Progress Indicator
Current state is represented graphically to the customer. As the customer progresses through the indicator bar will move along accordingly
- 2 Cancel CTA
Customer can click on "Cancel" to go back to the entry screen
- 3 Next CTA
Customer can tap on "Next" to proceed to the next screen of the Needs Analyzer. Next CTA will remain disabled till the customer makes a selection

The image displays four sequential screens of the HSBC Insurance Needs Analyzer app, showing a user's progression through different life situation categories.

Screen 1: FAMILY

- Header: HSBC Needs Analyzer
- Text: Which of these would best describe your life situation?
- Progress bar: 20% (green)
- Section: FAMILY (grey button)

 - I have kids
 - I have dependant parents
 - I have a history of family illness
 - My spouse is working

- Section: FINANCES (grey button)
- Section: CAREER (grey button)
- Section: LIFESTYLE (grey button)
- Buttons: Back (red), Next (red)

Screen 2: FINANCES

- Header: HSBC Needs Analyzer
- Text: Which of these would best describe your life situation?
- Progress bar: 30% (green)
- Section: FAMILY (grey button)
- Section: FINANCES (grey button)

 - Monthly Income: Input field (empty)
 - Progress bar: 10K, 30K, 50K, 70K, 90K, >100K (red dot at 10K)
 - Monthly Savings: Input field (empty)
 - Progress bar: 30K, 50K, 70K, 90K, >100K (red dot at 30K)
 - I am saving for my kids college
 - I am paying off my loans
 - Recently have a new or bigger mortgage

- Section: CAREER (grey button)
- Section: LIFESTYLE (grey button)
- Buttons: Back (red), Next (red)

Screen 3: CAREER

- Header: HSBC Needs Analyzer
- Text: Which of these would best describe your life situation?
- Progress bar: 45% (green)
- Section: FINANCES (grey button)
- Section: CAREER (grey button)

 - I am between jobs
 - I am planning to take a break and study
 - I started / expanded my business
 - I recently got a raise

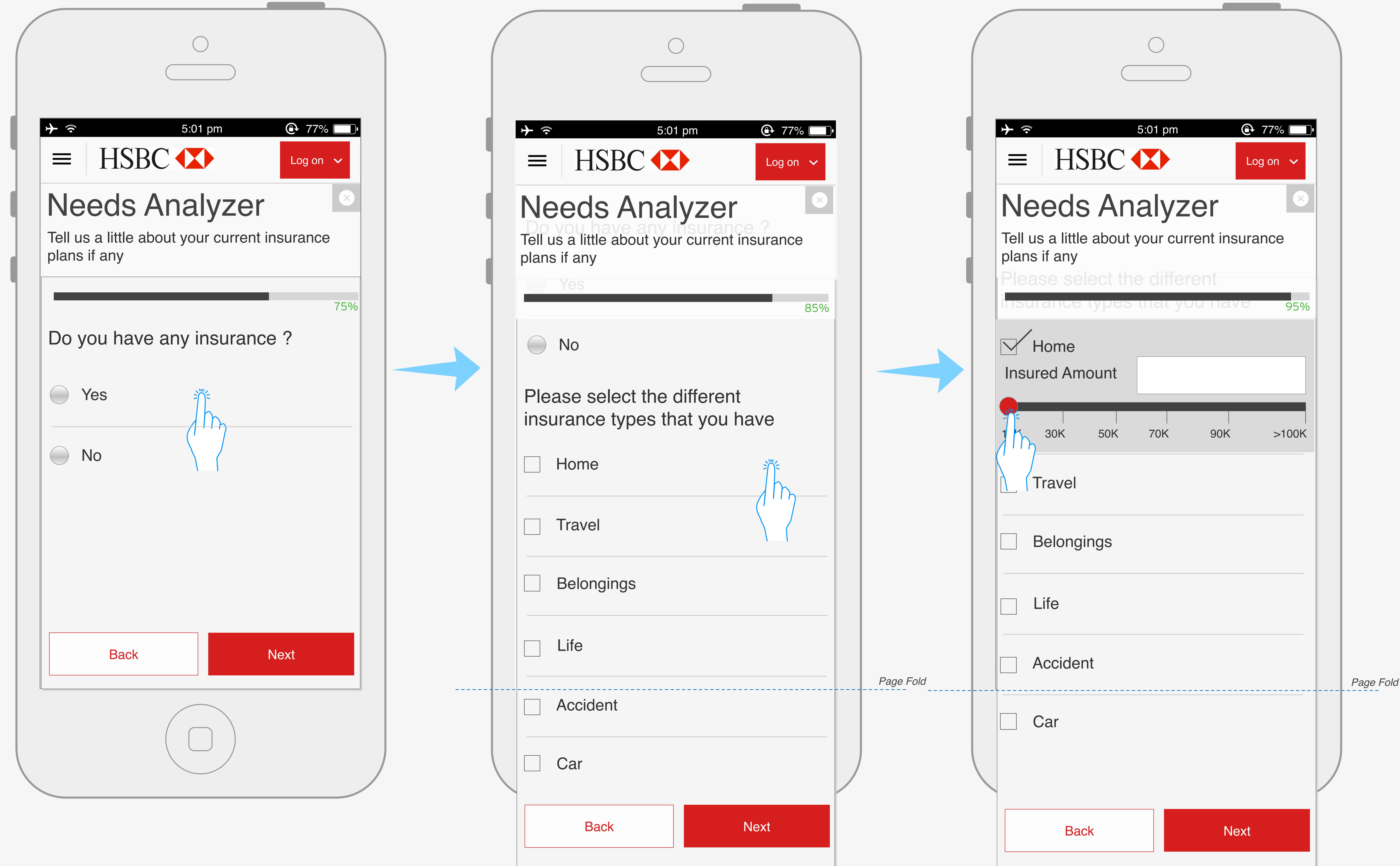
- Section: LIFESTYLE (grey button)
- Buttons: Back (red), Next (red)


Screen 4: LIFESTYLE

- Header: HSBC Needs Analyzer
- Text: Which of these would best describe your life situation?
- Progress bar: 65% (green)
- Section: FINANCES (grey button)
- Section: CAREER (grey button)
- Section: LIFESTYLE (grey button)

 - I travel atleast 5 times a year
 - I own a lot of gadgets and devices
 - I own a car
 - I have a maid
 - I am an expat

- Buttons: Back (red), Next (red)





The image displays two side-by-side wireframe mockups of a mobile application interface for the HSBC Insurance Needs Analyzer. Both screens are identical in layout but differ in the content of the central text area.

Screen 1 (Left):

- Header: Shows the HSBC logo and a "Log on" button.
- Title: "Needs Analyzer".
- Text: "Please enter your email address so that we can mail you a copy of your results."
- Form Field: "Email Address" with an input field.
- Buttons: "Back" and "Submit".
- Footer: "FOREIGN CURRENCY TIME DEPOSIT" with a dropdown arrow icon.

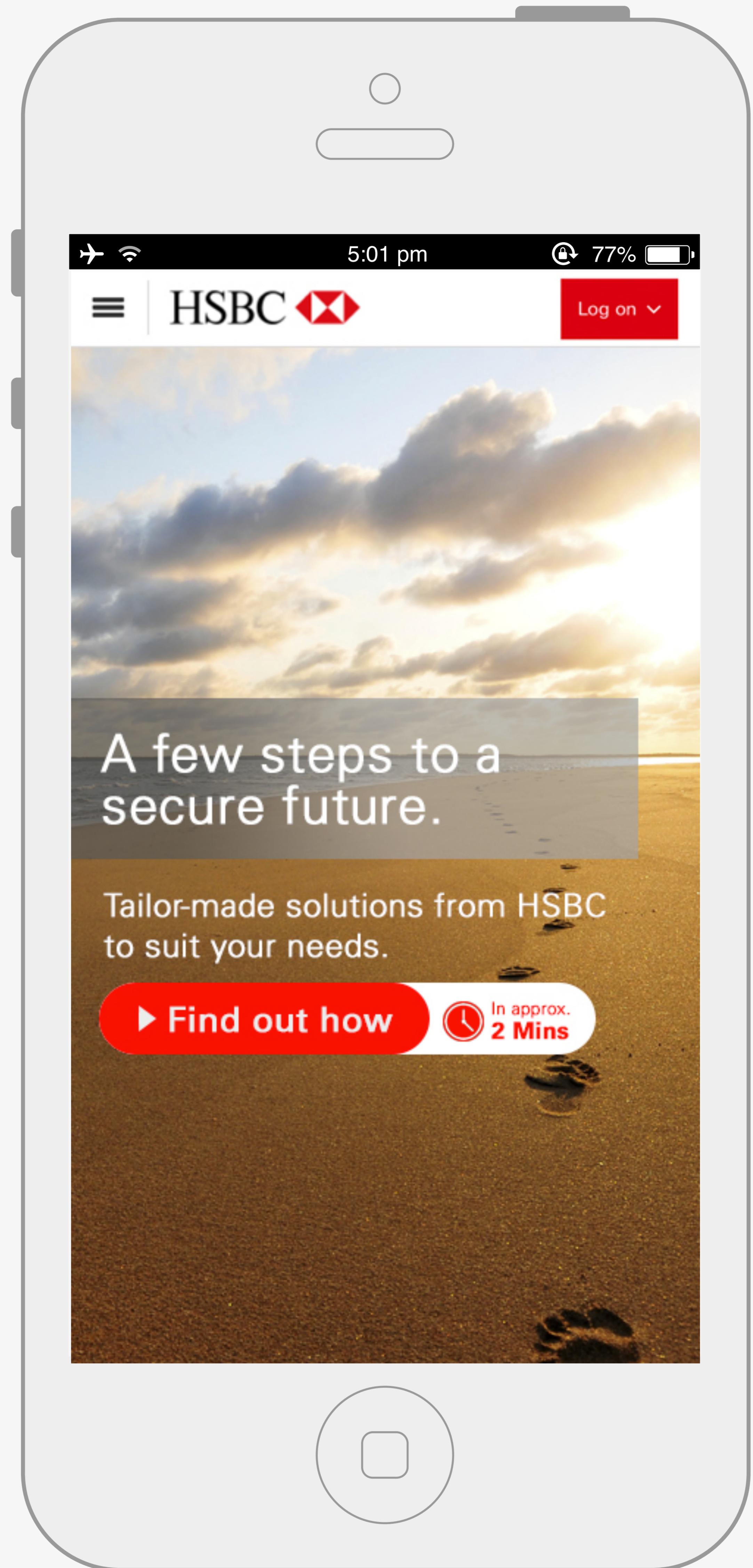
Screen 2 (Right):

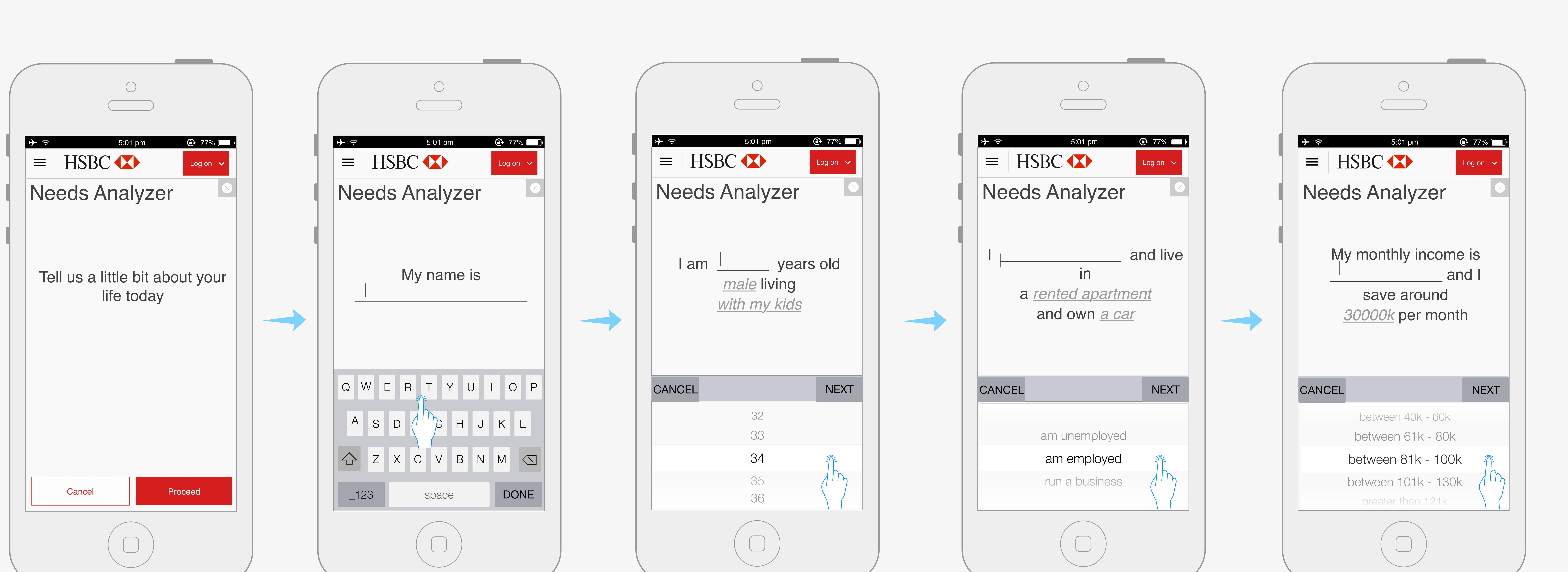
- Header: Shows the HSBC logo and a "Log on" button.
- Title: "Needs Analyzer".
- Text: "Interested in applying for any of these products ? Fill in your details and one of our representatives will get in touch with you."
- Form Fields:
 - "Name" with an input field.
 - "Phone Number" with an input field in the format "() - ()".
 - "Email Address" with an input field.
- Buttons: "Back" and "Submit".

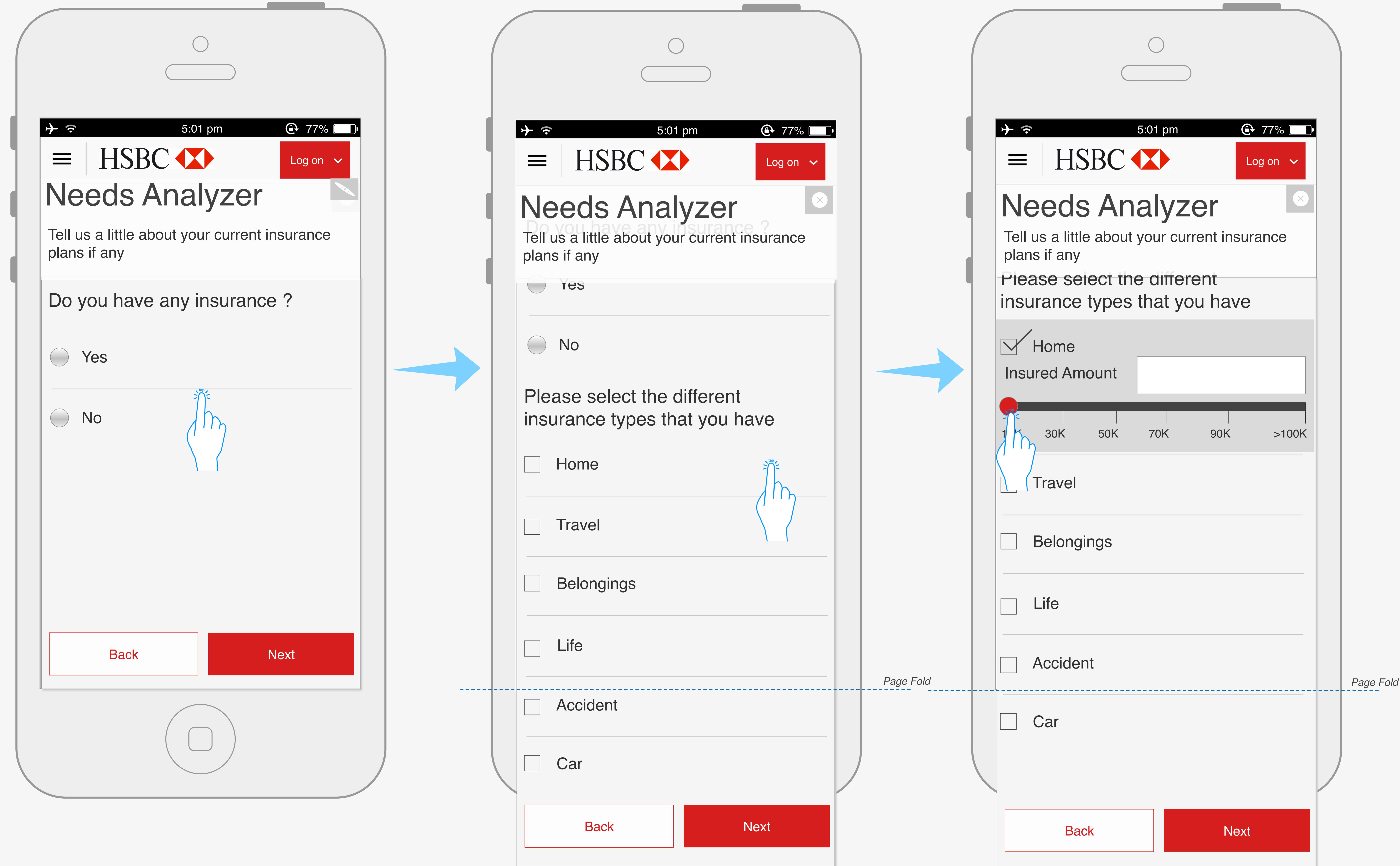
WIREFRAMES - APPROACH 2

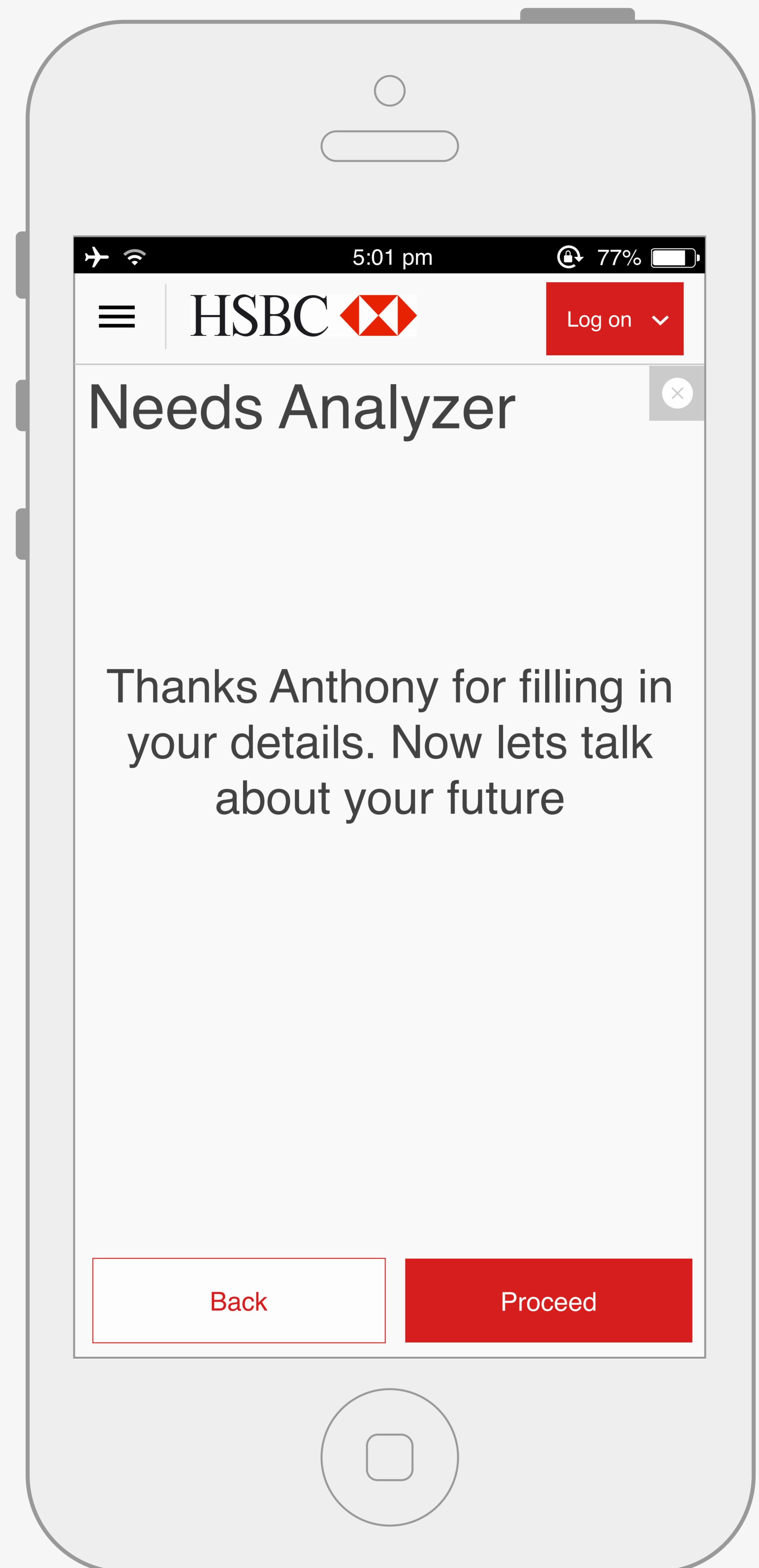
Life Today / Message / Future

- Conversational/Story Building
- Non Linear
- Discussion Based









Annotations

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