Chinasoft HASE COS UX/UI Scope of Work

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# Sub-Contractor Preliminary Question

In order to provide the goods and services to HSBC/Hang Seng, will you need to sub-contract part or all of the services to a 4th party? (For the purpose of this survey, Sub-Contractors are defined as your Suppliers OR other entities within your company organization OR any third parties involved in the provision of your services to HSBC/Hang Seng)   
 Yes √ No (tick one)   
If YES – you will receive a separate questionnaire for providing details of your proposed sub-contractors If NO – no further action required

# Target Goals

(“the Consultancy”) aims to provide digital user experience (UX) consultancy & design services for Hang Seng Bank Limited (“the Company”) to achieve the following business goals:

Simplify Workflow for both Staffs and Customers  
The Consultancy conducts user-centric analysis, focusing on information architecture, interface, interactivities, and usability of the Company’s existing Website . Having clearly devised user- centric analysis, the Consultancy formulates proper online user journeys and deliver comprehensive strategy on how to revamp the Company’s Website in order to create an optimized experience for the users.

Craft Digital Experience to Meet Users’ Expectation   
With rapid adoption of digital in financial services, growing diversity of computing devices, as well as increasingly sophistication level of user behavior, the Site needs to deliver effective user experience (UX) to meet expectations & needs of the staffs and customers.

# UX Delivery Approach

The Consultancy adopts the Lean UX approach, avoiding to produce excessive documentations, we deliver only the materials that directly contribute to the end product.

# Expert Review

The Consultancy will review existing materials such as the related forms and pages to the project. The inspection will be from user experience and usability perspectives. Findings and recommendations will be preserved as list of design notes for Experience Design.

Deliverables:

* List of design notes on existing material.

# Experience Design

The Consultancy will produce wireframes to illustrate the user experience of the design, it serves as a communication tool for business and technical teams to understand the flow, information architecture and interactivity of the design.

The wireframe for desktop includes all pages that are needed for the following features:

Application Journey

* Account Opening Form (help enhancement)
* Onboarding Form (from PDF)
* Check Status
* Upload Documents

Staff Dashboard

* Calendar view
* Time slot management
* Form management (e.g. view, edit)
* Form commenting
* Case management (e.g. change status, submit to system)
* Notification
* Send email
* Search and Filter
* Management information report

Actual forms validation logic will not be included in the wireframe, instead, a page of wireframe will be produced to illustrate how to handle different types of errors.

Due to the nature of the tool, the wireframe will not connect to database for dynamic data, and can only perform limited calculation.

Since the pages are responsive, the content of the desktop and mobile version should be mostly identical, hence it is not necessary to produce both versions for each single page. Instead, a set of wireframes to illustrate the responsiveness on layout level and UI elements level (if any) will be produced.

The interactive wireframe will be produced with Axure or similar tool. The wireframes will be password protected and shareable online.

Although the site supports 3 languages, the wireframe will be created in English only.  
  
Deliverables:

* Interactive Wireframe for Desktop
* Interactive Wireframe for Mobile only to illustrate the responsive layout and differences on UI elements

# Visual Design

The Consultancy will study the existing user interface components (e.g. buttons, text fields, icons) and branding guideline for look and feel reference.

In order to govern the visual consistency, an UI library of all elements to be used for all pages will be produced.

All the elements contains in the library will be verified with the development team to ensure that they are technically viable and complies with the front-end framework.

Deliverables:

* UI library (in Axure)

# HTML

A HTML page that contain all the elements in the UI library will be created,it will be used to demo the interactivity of the UI elements and the responsiveness of the layout.

Since the pages will be residing on Hang Seng’s public website, the HTML will follow the Supported Browser List of Hang Seng’s public website, to be provided by the Company.

To ensure maximum compatibility to the browser, we recommend to adhere to the stock bootstrap styling as much as possible.  
  
Deliverables:

* A HTML Demo page with javascript library

# Supported Browser List

The list will be updated to match the supported browser list of Hang Seng’s public website.

|  |  |  |
| --- | --- | --- |
| **OS** | **Browser** | **TLS v 1.2** |
| **Windows 7+****Mac OS 10.9+****Android****iOS** | Google Chrome | 30+ |
| **Windows 7+****Mac OS 10.9+****Android****iOS** | Mozilla Firefox | 27+ |
| **Windows 7+****Windows Server 2008 R2+** | Microsoft Internet Explorer | 11 |
| **Windows 10****Windows Server 2016** | Microsoft Edge | 12+ |
| **Windows Phone 8+** | Microsoft Internet Explorer Mobile | 11 |
| **Mac OS (OS X 10.9+)** | Apple Safari | 7+ |
| **iOS 5+** | Apple Safari | 5+ |
| **Android 4.1+** | Network API | 5.0+ |
|  |  |  |

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# Usability Test

The usability test will be focusing on the Staff Dashboard.

A test participants pool of 5 people will be formed, and be made available when there is need for usability tests.

5 rounds of usability tests will be performed at different stage of the design process. (Additional rounds of test can be formed when necessary and resources available. )

Tasks and responsibilities:

* Usability Test planning to be provided by the Consultancy
* Usability Test to be designed by the Consultancy;
* Usability Test to be conducted by the Consultancy;
* Test participants to be provided by the Company, they should be someone outside of the

project;

* Usability Test Incentive (if any) to be provided by the Company;
* Equipments for the usability test to be provided by the Consultancy;
* Finding and recommendation of the test to be provided by the Consultancy.

Deliverables:

* Comments on the wireframe. The usability test finding will be marked on the wireframe as comments for sharing and design revisions.

Out-of-Scope Services

The following services are out of our proposed scope:

* Copywriting of the text content;
* Translation of the text content;

# Project Schedule

The project will be divided into design sprints, each sprint is consists of two weeks. Sprint 1 starts on 7 Jan 2019 and ends on 18 Jan 2019 and so on.

We adopt the agile development model. The detailed activities of the sprint will be defined and communicate to the project team at the beginning of each sprint.

Tentative schedule

|  |  |  |
| --- | --- | --- |
| Phrase | Sprint |  |
| Understanding | Sprint 1  2019.01.07 - 2019.01.18 | * Preliminary UX/UI design for question set (a collection of UI elements to be used for the account opening form and onboarding form) * High level page flow |
| Sprint 2  2019.01.21 - 2019.02.01 | * Expert Review on existing material |
| Foundation | Sprint 3 - 4  2019.02.04 - 2019.03.01 | * Visual Design * HTML Demo |
| Design | Sprint 5 - 7  2019.03.04 - 2019.04.12 | * Experience Design on Application Journey |
| Sprint 5 - 13  2019.03.04 - 2019.07.05 | * Experience Design on Staff Dashboard * Usability tests |
| Enhancement and Support | Sprint 14-15  2019.07.08 - 2019.08.02 | * Style fixes * Development Supports |

# Support

The consultancy will provide 30 days of UX/UI support after project sign off.

Rate

Rate Card

|  |  |
| --- | --- |
| Position | Daily Rate (HKD) |
| UX Lead | 6,496 |
| UX Designer | 4,147 |
| Visual Designer | 2,992 |

# Payment

Payment Schedule

|  |  |  |  |
| --- | --- | --- | --- |
|  | Milestone | Date | Percentage |
| 1 | Project Commencement | January 2019 | 30% |
| 2 | Mid Term (end of sprint 8) | April 2019 | 30% |
| 3 | Work Completion | August 2018 | 30% |
| 4 | Project Sign Off | September 2018 | 10% |

Account Info

|  |  |  |
| --- | --- | --- |
| Bank Name | Account Number | Beneficiary Name |
| HSBC Hong Kong (004)  SWIFT Code: HSBCHKHHHKH | 123-456-789-000 | Chinasoft International |

All associated bank charges, government fees shall be borne by the payer.

If payment of invoice is not made by the Company in accordance with the terms of this Agreement, the Consultancy shall be entitled to suspend further work until payment is made.