

# Kenneth Looi

Sample Projects

&

End to end product design process overview / checklist

# Barclays Capital 'Request'

Request is a browser-based automated software & hardware provisioning system as well as an internal AIM (access and identity management) tool for the bank.

## **Project Deliverable**

Design & implement a new internal bank-wide infrastructural system that will replace an internal legacy system and that will automate the process of provisioning new joiners or existing staff with appropriate software, hardware or specific service requests.

## **Outcome**

A web-based system was designed, implemented and refined throughout a 2 year process. A complete and successful overhaul of the existing legacy system took place and 'Request', the new system became the defacto system for raising requests (software, hardware, other services) within Barclays Capital.

## **Benefit**

Previously manual, repetitive and laborious processes were now streamlined and automated. 'Packages' could be set up for specific types of new joiners (new employees) and such packages could be deployed automatically within a few steps. Workload for teams previously working on manual tasks associated with the old system was free-ed up tremendously and the time it took for a service to be deployed to the end-user took considerably much less time.

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# Wealth Management iPhone App For A Leading Swiss Bank

Whilst working at AdNovum Singapore, a high precision Swiss Software House with headquarters in Switzerland, I used my knowledge of consumer and private banking (high net worth segment) internet banking related features to prototype a proprietary mobile banking solution that could be customised for banks.

## Project Deliverable

Analyse competitor online banking solutions and extract product features, including innovations of your own, to create a proprietary online banking solution that can be skinned for any bank customer.

## Outcome

A series of screen designs regarding specific functions and detailing user interaction and a list of functions that could be implemented in addition to an existing online banking product suite was the final output.

## Benefit

Banks or financial institutions, potential customers of AdNovum, could now request specific online banking features for implementation or take up the entire suite / solution. We showcased at a FinTech event at Marina Bay Sands Singapore.



**Features**

- Full Suite of Personal Banking Functionality
- Finance Over (Accounts, Portfolios)
- Credit Card Management
- E-Billing / Invoicing using Code Scanner (iPhone Camera)
- Full Market Data Access (Equities, Bonds, Forex, etc)
- Instruments View / Charting
- Access to Bank Products
- Securities Trading
- Order, Buy & Sell Positions
- Intraday Valuations
- Portfolio Notifications
- Forex calculator and more



# DBS Market Watch iPad App

DBS Market Watch is an app that allows DBS Private Banking customers to watch the performance of stocks and assets.

## Project Deliverable

Design an iPad app that shows realtime stock information in a graphical manner for users to make better informed financial decisions.

## Outcome

An iPad app was prototyped that displayed selected stock info (customisable) in a linear progressive chart, up/down stock price tickers, a horizontal news scroller (using info from a feed) and a detail view section which included executable functions (preset batch executables triggered by specific market outcomes).

## Benefit

Private Banking customers could potentially have access to a reliable, mobile source of information regarding market movements and execute 'ready-made' orders on the go.





Market Watch

4:20 PM

DBS PRIVATE BANK

DJI Dow Jones IBCX S&P 500 NASDAQ

0.25%  
0.00%  
-0.25%  
-0.50%  
-0.75%  
-1.00%

GAN, GOLDMAN PROFITS RISE SHARPLY RIO TINTO CEO STEPS DOWN GLOBAL REGULATORS DOWN DREAMLINERS U.S STOCK FUTURES FALL GOLDMAN EARNINGS SOAR TO 2.8

296.69	+2.54	BARC	192.59	-0.09	IBM
506.09	+20.17	AAPL	34.64	-0.06	ORCL
12.61	-0.56	DELL	18.69	-0.31	REA
296.69	+2.54	BARC	192.59	-0.09	IBM
506.09	+20.17	AAPL	34.64	-0.06	ORCL
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12.61	-0.56	DELL	18.69	-0.31	REA
296.69	+2.54	BARC	192.59	-0.09	IBM

295.80 -0.25 (-0.08%)

BARC Barclays PLC

Customize Orders Trade Exit

# SCB Private Banking iPad App

Standard Chartered Bank has a customer segment called Private Bank which has a separate visual identity and exclusivity. This app focuses on servicing the needs of this customer segment.

## Project Deliverable

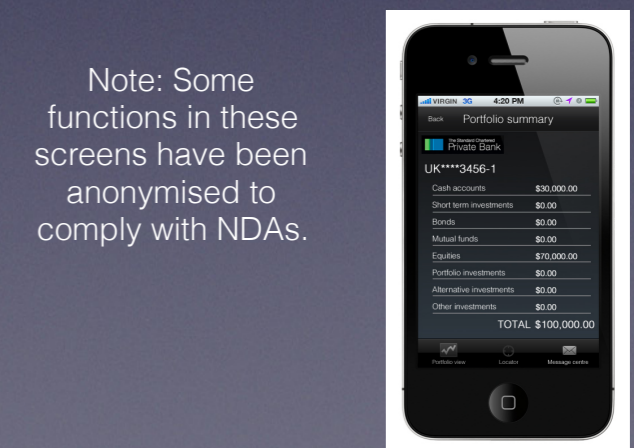
Design an iPad app for SCB's high net worth customer segment which has a separate visual identity from the normal customer base. Work with Standard Chartered BAs to incorporate Private Bank specific features and functionality.

## Outcome

A set of mobile & tablet screen designs were accomplished through collaboration with the product and BA team. We achieved a satisfactory visual outcome in terms of visual identity goals.

## Benefit

The bank could now implement a solution specifically for their private banking customer segment which was exclusively to them.



Note: Some functions in these screens have been anonymised to comply with NDAs.

# NBN - Tablet Solution

NBN has a currently un-streamlined method whereby property developers submit NBN service requests. I was given a task to improve this process (currently an online form) as well as address certain key requirements.

## **Project Deliverable**

Design a solution that streamlines the potentially tedious process of adding multiple similar addresses within the NBN service request submission process.

## **Outcome**

A wireframe for a submission system that addressed all key requirements as well as provided additional functionality not mentioned in the brief was designed.

## **Benefit**

Property developers (the main users of the current NBN service request submission online form) could now potentially use this system instead and save enormous time and effort on what was a laborious and painstaking process. They can also now have 'draft' modes and load sets of requests for other developments as opposed to just a single development.

New Property

North Shore Developments 2016

CHATSWOOD POINT [edit field](#) 1A-3D / 3-5 Anderson St, Chatswood 2067 REQ014 -

1. Enter Postcode / Suburb

2067
2067 - Chatswood
2067 - Chatswood West

2. Enter Street Name

Ander
Anderson Street
Anderson Lane

3.  Enter Street / Lot Number

6
3-5
6-9
10-11
12

4. Select Units

Select Unit(s) Only display if lot is multi-dwelling

1A	2A	3A	4	8
1B	2B	3B	5	9
1C	2C	3C	6	10A
1D	2D	3D	7	10B

Select Street / Lot Number(s)

3	4	5	6
6	7	8	9
10	11	12	

CONCORDIA RESIDENCES REQ001 X

UNIT 1-10, 3 CONCORDIA ROAD, NSW 2020  
10 UNITS in Lot [ungroup](#) >>



CONCORDIA GUARDHOUSE REQ011 X

UNIT 15, 3 CONCORDIA ROAD, NSW 2020  
**INFORMATION MISSING** >>

CHATSWOOD GROVE REQ012 X

12 ANDERSON ST, CHATSWOOD NSW 2067  
1 LOT >>

CHATSWOOD ORCHARD REQ013 X

10-11 ANDERSON ST, CHATSWOOD NSW 2067  
2 LOTS [ungroup](#) >>

MILSONS GREEN 5-7 MILSONS POINT [expand +](#)

ATLAS TOWER OFC EXTENSIONS 102B-110C, 55 MILLER ROAD [expand +](#)

[ungroup all](#)  
[expand this pane](#)

Duplicate Selection

Delete Selection

Move Selection(s) to Cart

Submit Request(s)

Please Review Requests

North Shore Developments 2016

## Units 1-10 / 3 Concordia Road, NSW 2020

CONCORDIA RESIDENCES      REQ001 X  
UNIT 1, 3 CONCORDIA ROAD, NSW 2020  
>>

CONCORDIA RESIDENCES      REQ002 X  
UNIT 2, 3 CONCORDIA ROAD, NSW 2020  
>>

CONCORDIA RESIDENCES      REQ003 X  
UNIT 3, 3 CONCORDIA ROAD, NSW 2020  
>>

CONCORDIA RESIDENCES      REQ004 X  
UNIT 4, 3 CONCORDIA ROAD, NSW 2020  
>>

CONCORDIA RESIDENCES      REQ005 X  
UNIT 5, 3 CONCORDIA ROAD, NSW 2020  
>>

CONCORDIA RESIDENCES      REQ006 X  
UNIT 6, 3 CONCORDIA ROAD, NSW 2020  
>>

CONCORDIA RESIDENCES      REQ007 X  
UNIT 7, 3 CONCORDIA ROAD, NSW 2020  
>>

CONCORDIA RESIDENCES      REQ008 X  
UNIT 8, 3 CONCORDIA ROAD, NSW 2020  
>>

CONCORDIA RESIDENCES      REQ009 X  
UNIT 9, 3 CONCORDIA ROAD, NSW 2020  
>>

CONCORDIA RESIDENCES      REQ010 X  
UNIT 10, 3 CONCORDIA ROAD, NSW 2020  
>>

## Unit 15 / 3 Concordia Road, NSW 2020

CONCORDIA GUARDHOUSE      REQ011 X  
UNIT 15, 3 CONCORDIA ROAD, NSW 2020  
INFORMATION MISSING >>

Submit Request(s)

# General Project Phases

- Goals / Planning
- Design
- Development
- Launch / Marketing
- Post Launch
- Expansion / Improvement

# Phase: Goals / Planning

- Best practice: Ask the right questions
  - Why is the app / solution needed?
  - What is it intended to address?
  - How can we delight customers through a compelling mobile experience?
  - What are our goals?
  - How can the app attract more customers?
  - How can the app increase customer usage?
  - How can the app extend an existing campaign?

# Sample Goals

- Extend existing campaign to connect with mobile customers
- Improve customer loyalty through daily / more frequent app usage
- Conjure and deliver new customer experiences possible only with mobile technology
- Stay ahead of competitors

I find it helpful to focus on a short list of main goals.

# Goal Refinement

- What problem should the app solve?
- What do our customers value?
- What competing apps are there?
- What is the target market?
- How will people find out about the app?
- What content should go into the app?

I find that the more good questions are asked, the better our understanding gets and the easier it is to design a solution that works / excels.

# Project Pre-Start Checklist

- Capture Key Goals & Publicise them on Project Wall
- Know the customer (target audience, ideal users, user's platform statistics, etc)
- Document business and technical assumptions (publish on project wall, either virtual realtime board, wiki or IRL wall)
- Review launch process
- Review budget and team selection approach (in-house, freelance, offshore, etc)
- Assemble Team, Kick Off
- Go through and reach conclusion on high-level timelines / launch milestones

A checklist helps me to capture anything that I might have missed.

# Phase: Design

- Information Architecture
- User Interface
- Visual Design

# Phase: Design > IA

- Information Architecture
  - Card Sort, Rank and organise content or functionality into categories or screens, Establish Info and Navigation Hierarchy
  - Identify main user stories, Determine step by step flows for these customer journeys. Map them out visually.
  - Make the most important info the most visible and accessible via the least number of micro-interactions ('taps' or 'swipes' for instance).
  - Define user actions and action\_names such as: 'Edit', 'View Spendings', 'Manage Account'
  - Choose navigation pattern based on info we have acquired so far

# Phase: Design > UI

- User Interface
  - Keep user's primary goals in mind when designing app or mobile channel
  - Design for touch, 3D touch, ensure elements are appropriately sized (size, colour and interaction experimentation tests)
  - Follow platform specific conventions as general rule although a little deviation is ok if innovative and creative

# Phase: Design > Visual Design

- Visual Design
  - Complement existing branding
  - Delight users with visually rich interfaces
  - Consider all elements of visual design. Shape, tone, texture, etc.
  - Work with visual designer to ensure brand identity guidelines are met and app objectives are met. Fine-tune visual design.
  - Ensure overall look & feel of app is exceeds expectations quality wise. Everything has to be precise and alignment pixel perfect / mathematically congruent.

# Phase: Development

- Reduce project risk: Prove key concepts early (fail early / often), stay involved throughout process.
- Clarify integration matters as early as possible: API limitations, 3rd party services to be used, server side functionality and limitations, licensing costs, etc.
- Perform inter-department checks to ensure app / mobile solution meets regulatory or organisational requirements (privacy controls, encryption standards, etc)
- Integrate analytics for usage monitoring purposes, to analyse conversion paths, etc.
- Maintain momentum with iterative development: Weekly sprints, progress updates, regular demos or beta versions.
- Thoroughly test app on a variety of devices and OS versions (usually with help from a testing team or dedicated testing software).
- Allow time for optimisation, pixel pushing, bug fixing and special improvements / additions.
- User test: Get objective feedback from potential users outside of organisation.

# Phase: Launch / Marketing

- Pre-Launch:
  - Plan a promotion calendar leading up to launch day
  - Keep excitement going with pre-launch promotions (Sneak peeks, teaser videos, mailing list)
  - Decide on good keywords for SEO purposes or for app store submissions
  - Press Release + Teaser Video
  - Create landing page for app + updates corner
  - Consider mobile advertising, print, television and email marketing services
  - Engage users via social media channels to drive downloads, inform
  - Reach out to reviewers / tech-zines / industry publications, etc

# Phase: Launch / Marketing

- Launch Day:
  - Update landing page / blog
  - Notify and inform all staff of product launch, prepare product launch info-kit incase public asks staff members about the digital product
  - Email existing customers, partners, notify via social media (use social media contests / special promo-codes / promotions / other marketing methods)
  - Send press-kit (press release, screenshots, app icons, logos, colour guides, URL, etc) to press

# Phase: Post-Launch

- Keep promoting / marketing the app even after launch
- Monitor analytics / rankings
- Review all incoming feedback
- Acknowledge all customer feedback as timely as possible
- Politely engage feedback submitters, extract useful info
- Review app improvements / suggestions