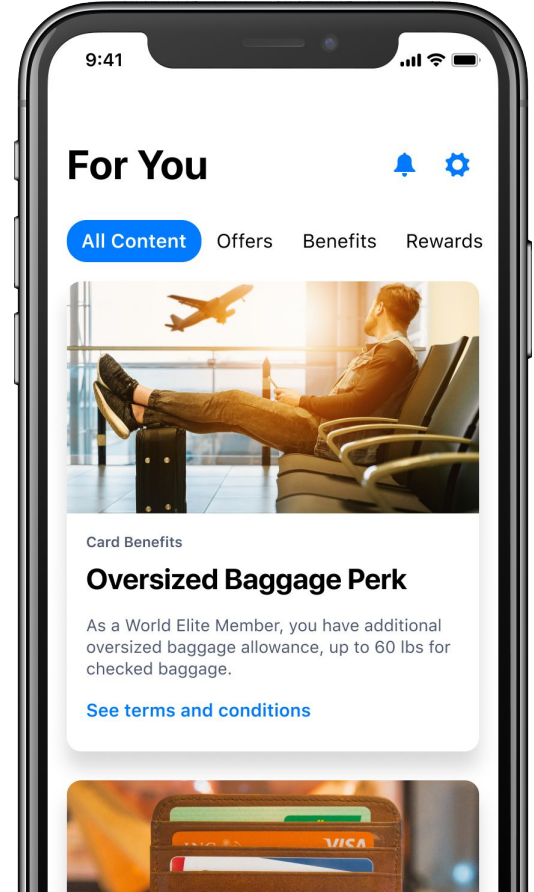


## Case Study

# Concierge Starter Templates

Streamlined content templates for pilot credit card and consumer banking use cases.



# My contributions

Squad Structure:

Solo designer & design researcher

Activity Highlights:

- Stakeholder interview
- User interview
- Interaction & visual design
- Usability testing
- Design specs handoff



# Table of contents

Streamlined content templates for pilot credit card and consumer banking use cases.

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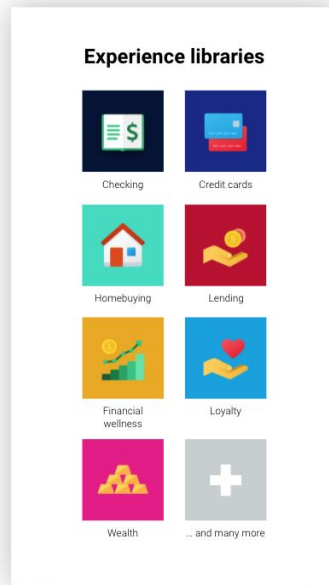
01

**What is Flybits?**

**What is Flybits Concierge?**

# The Flybits platform

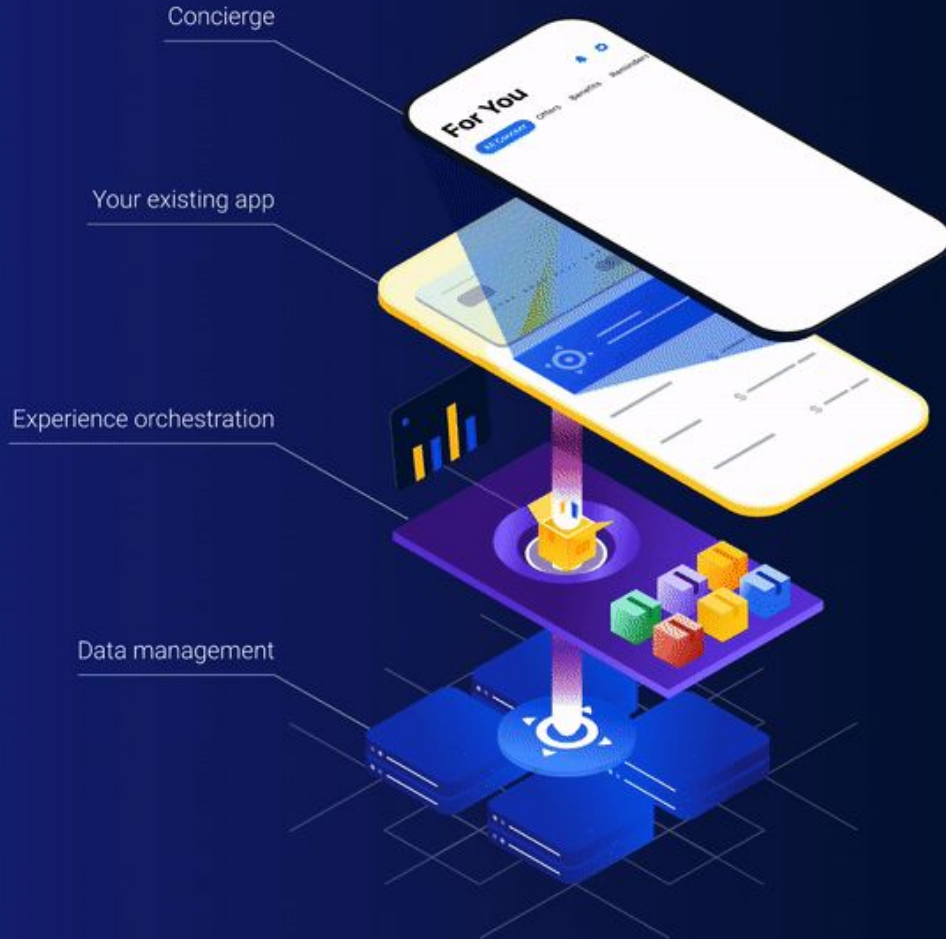
An end-to-end digital experience platform, designed to help FI's deliver predictive micro-personalized customer experiences.



## Always-on:

listening for when, where and what the customer needs





# Flybits Concierge

- To financial services - a white-label, turnkey integration for iOS/Android that enables financial institutions to embed a personalized recommendation feed within their mobile app.
- To consumers - a content feed that dynamically shows insights, recommendations, and advice, personalized to each banking customer.

02

**WHY**

**Where we started: the original  
task**

## The task

# How can we support content types efficiently?

For Flybits Consumer Experience squad, we're experiencing inefficiencies supporting the variety and styles of our current content offerings.

- Spend unnecessary time discussing and supporting content types (e.g. Schedule, Links, etc.)
- Actively used 'messaging' content types can't satisfy both use case requirements and effective user interaction.



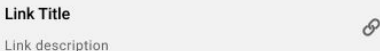
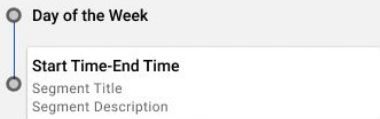
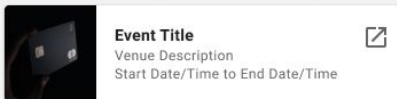
Design outcomes

# Visual design in a nutshell



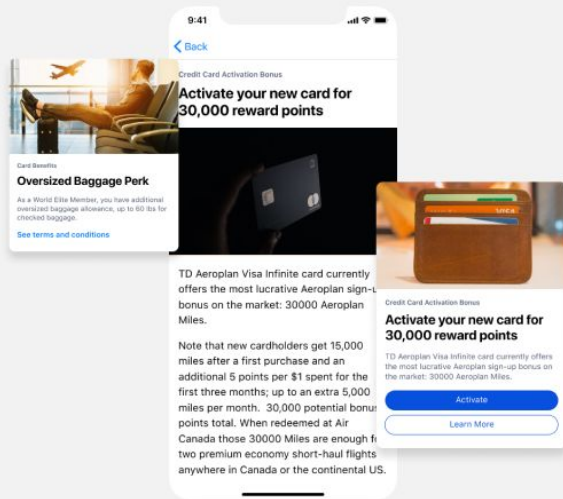
**Article Title**  
Subtitle subtitle subtitle subtitle subtitle s...

Est voluptate aliqua consequat mollit pariatur elit eiusmod fugiat proident sit. Labore anim dolore proident id sit. Cupidatat non quis nulla fugiat adipiscing consectetur adipisicing et ullamco velit magna consectetur magna.



## Before -

Some types are not needed for pilot use cases.  
Some types can be considered as components.



## After -

Component-based content template  
that can be themed.

03

# WHO, WHEN & WHERE

## User discovery

# Understand current conditions

I spent three days interviewing stakeholders and users

## What I did:

- Interviewed our product consultants and sales engineers;
- Held a focus group session with marketers.

## Key observations:

- We currently support 11 content templates;
- Our customers only need 1-2 content types to support their initial credit card and consumer banking pilot use cases.



A surprising discovery

# The motivation for less



# Jessica Brown

## An overwhelmed user

Jessica is an Associate Manager, Digital Marketing at Four Lakes Bank. She focuses on execution of marketing campaigns for mobile channels. She doesn't have a lot of time to learn the platform, or create and launch individual campaigns.

### Goals

- Jessica want to differentiate their digital offerings from competitors;
- She wants to be as efficient as possible when executing on go-to-market strategies. This will allow her team to pivot based on consumer response as soon as possible.

### Pain points

- Too many templates to choose from;
- Doesn't have the confidence or time to pick the "right" template for a given use case;
- Current template naming conventions are also confusing.

“

... I like having different options, but I don't have the design expertise to decide which one is better for our use case. I wish it showed me the recommended ones, not all available ones.



**Jessica Brown**

An overwhelmed user

# Map pain points to opportunities

01

Deprecate the content types that aren't currently used in customer pilots;

02

Consolidate the 'messaging' types of content to a set that will satisfy pilot credit card/consumer banking use cases and effective user interaction experience;

03

Create a better naming convention for the content types.

04

WHAT

Design ideations & validations



Select the type of content you wish to create.

**Articles**

Share single or multiple links to articles, blogs, etc.

**Schedule**

Share event schedules/timelines, hours of operation, etc.

**Events**

Share event details for current and upcoming financial events, seminars, trade shows, etc.

**Video**

Share a single video or create a custom playlist.

**Tips and Reminders**

A general purpose template for investor tips, reminders, in-app alerts, etc.

**Images**

Share a single image or curate an image gallery.

**Website/URL Links**

Share links to one or more websites/URL links.

**Reward Opt-in Card**

Rewards houses perks that are points driven. A consumer may see perks that require opting-in, or perks that are automatically applied toward relevant purchases. Cancel or Accept

**Offers**

Offers houses perks that are enabled for a limited period of time, and are not associated with earning or burning, or paying with reward points.

**Benefits**

This is the third view from the top

**Reward Opt-in Confirmation**

With Learn More and it's already accepted

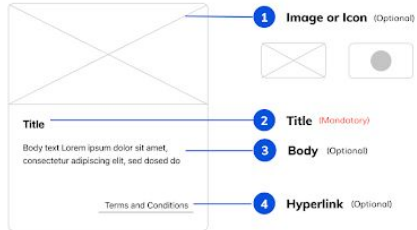
Some types can be considered as component/field within a card, i.e. Video, Website, Images, etc.

Some types are not needed for pilot use cases, i.e. Schedule, Events, Tips & Reminders.

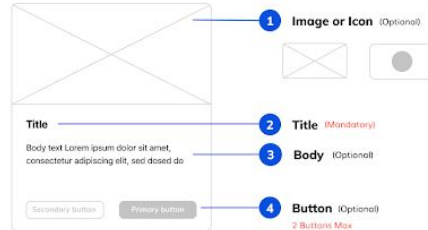
## Iteration #1

# From 11 to 3

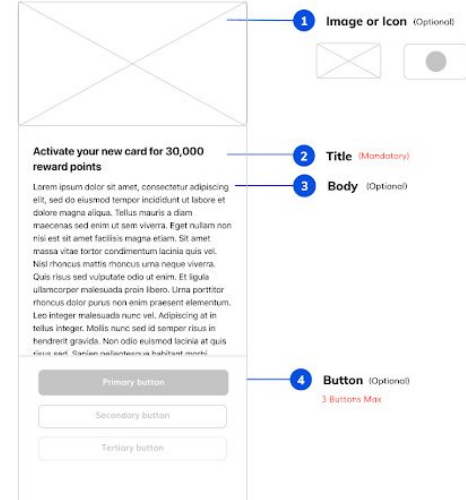
### Type 1: Content for Passive Reading



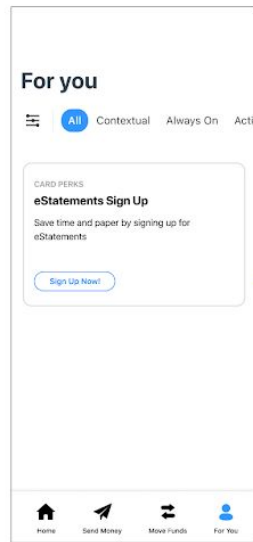
### Type 2: Content for Immediate Action



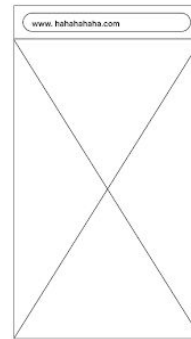
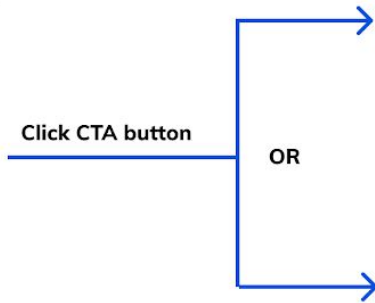
### Type 3: Content with More Info



Call-to-actions can either open a web link or another section of the app.



**2. View in-app content**  
**(Non-expandable)**



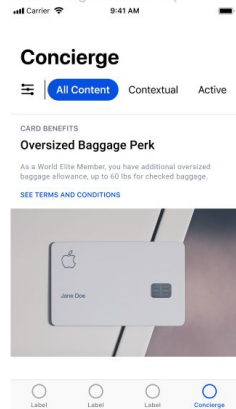
**3.1 Web page (external link)**



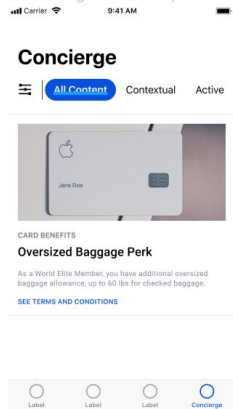
**3.2 Another section of the app**

# Design explorations

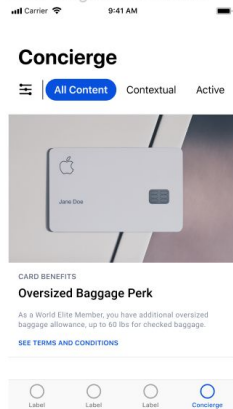
2.1.2 Image on the Top



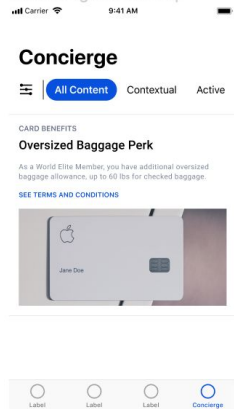
2.1.3 Image on the Top



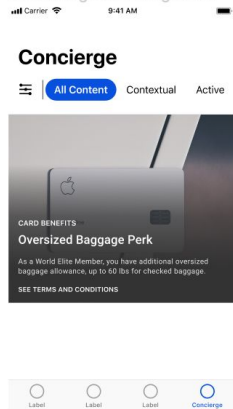
2.2.2 Image at the Bottom



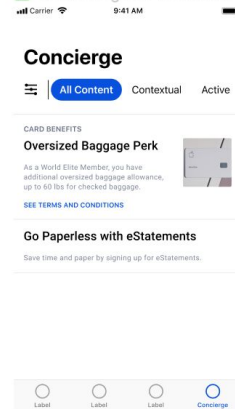
2.2.3 Image on the Top



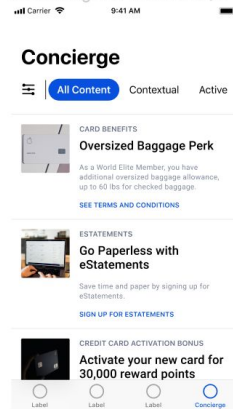
2.3.2 Image as Background



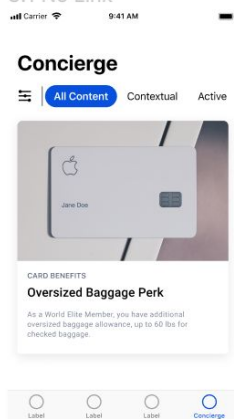
2.5.1 Image as Thumbn...



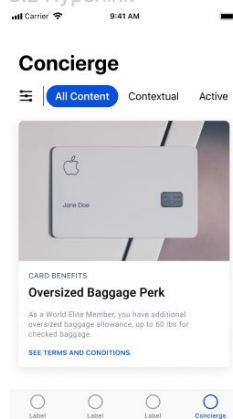
2.5.2 Image as Thumbnail /...



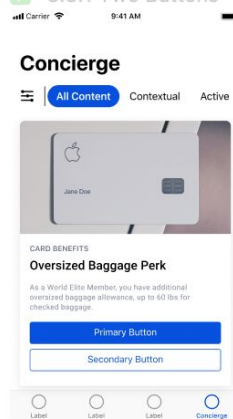
3.1 No Link



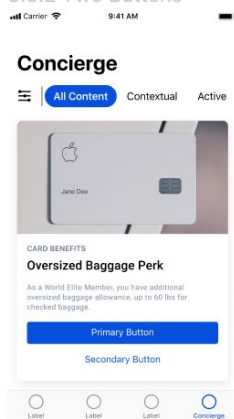
3.2 Hyperlink



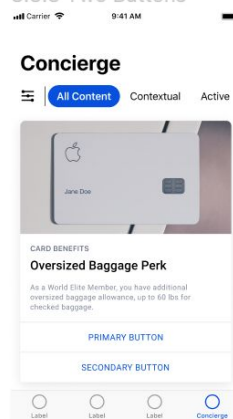
3.3.1 Two Buttons



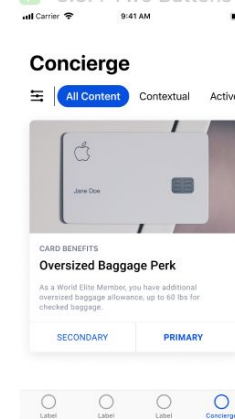
3.3.2 Two Buttons



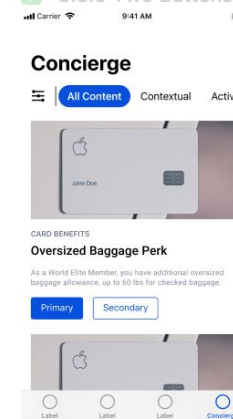
3.3.3 Two Buttons



3.3.4 Two Buttons



3.3.5 Two Buttons





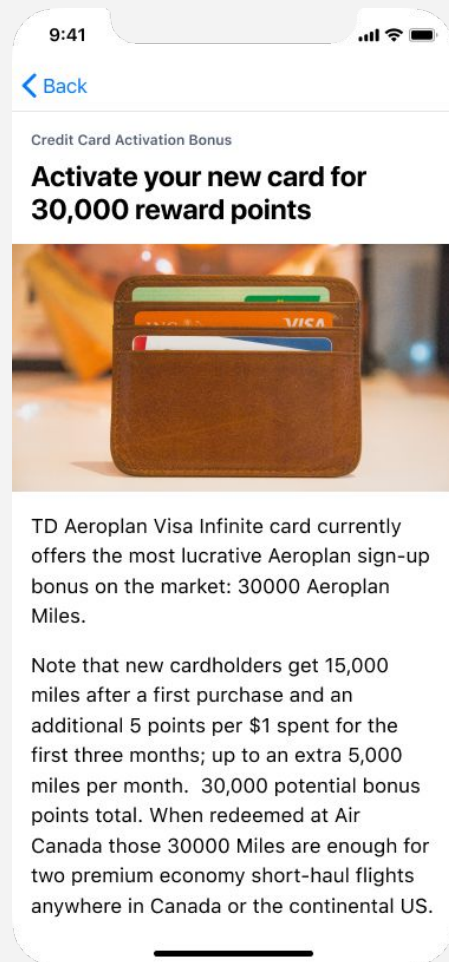
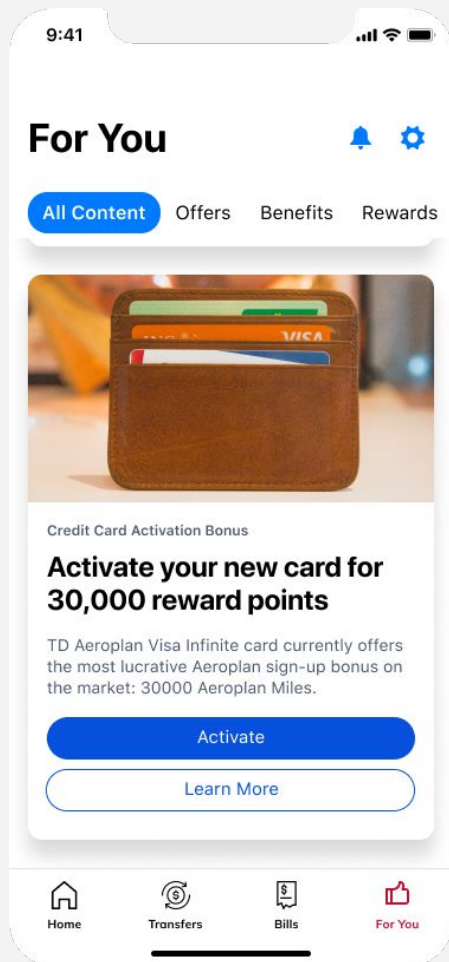
## Iteration #1 - User feedback

# Why not just have 1 template?

- Streamlined content templates are sufficient for most pilot use cases;
- Content creation: there is an opportunity that we can start with one template and allow users to configure at component level:
  - Mandatory vs optional fields;
  - Add link or button (up to buttons)
  - Button can open expandable view, web link or another section of the app.
- The design team will take care of the style (font, line-height, colour, spacing, etc). Most likely, they will set up all the styles once and not change it until rebranding.

Iteration #2

1 starter  
template  
which can be  
configured at  
component  
level.



## Iteration #2

1 starter  
template  
which can be  
configured at  
component  
level.

New Content ✕

Articles [Name of this Content]

Select the elements that you wish to include in the content.

**Select your content image preference**

- Large Image
- Small Image (Thumbnail)
- No Image

**Select your content element**

- Title
- Category Tag
- Description

**Select your Call-to-Action**


- No Call-to-Action
- Text Link
- Button(s)
  - Primary Button
  - Primary Button and Secondary Button

**Primary Button Link**

**Secondary Button Link**

Edit the element directly below

DELETE DUPLICATE



CARD BENEFITS

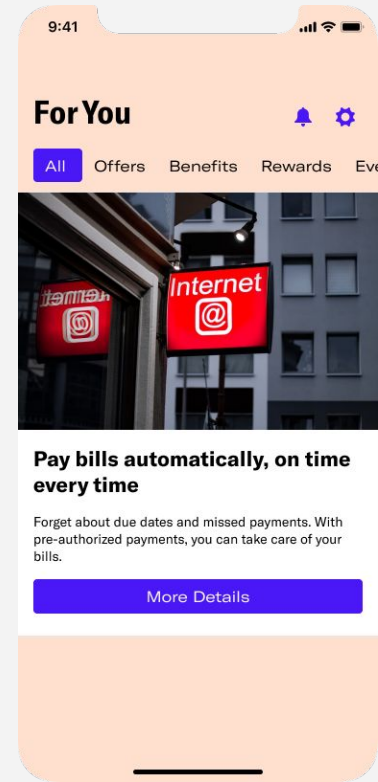
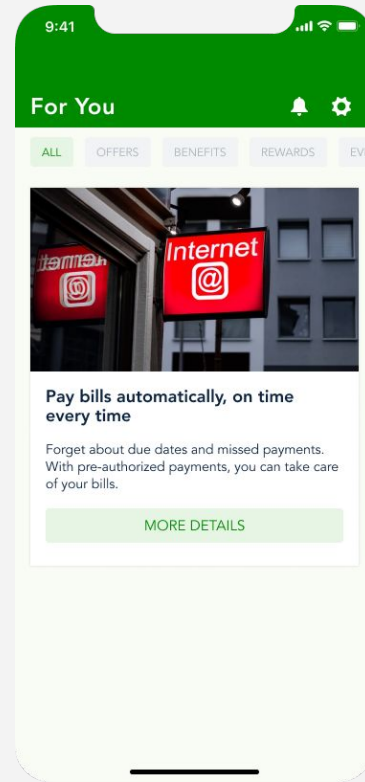
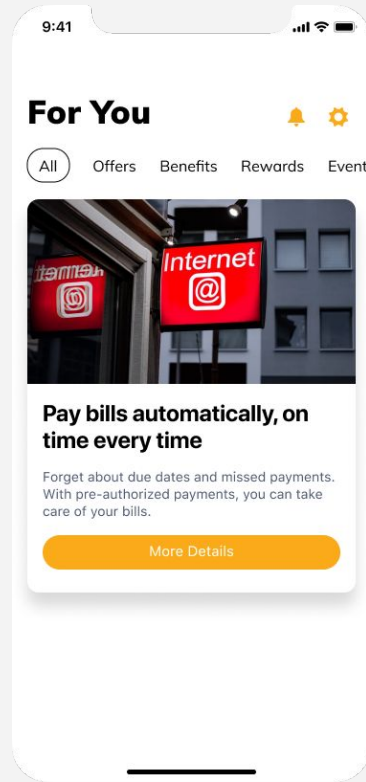
### Oversized Baggage Perk

As a World Elite Member, you have additional oversized baggage allowance, up to 60 lbs for checked baggage.

CANCEL

## Iteration #2

Client-side developers can customize the look and feel of Concierge through a JSON configuration file (iOS) or XML Configuration file (Android).





05

HOW

Metrics to measure success

# Success by the numbers

2

Existing enterprise customers adopted starter template after product launch

100%

Of new prospects used starter template for pilot use cases

>30%

Flybits CE squad reduced time spent in regression testings for releases

06

# RETROSPECTIVES

What could be better?

# What could be better?

01



## Design:

Component-based content creation process;

02



## Research:

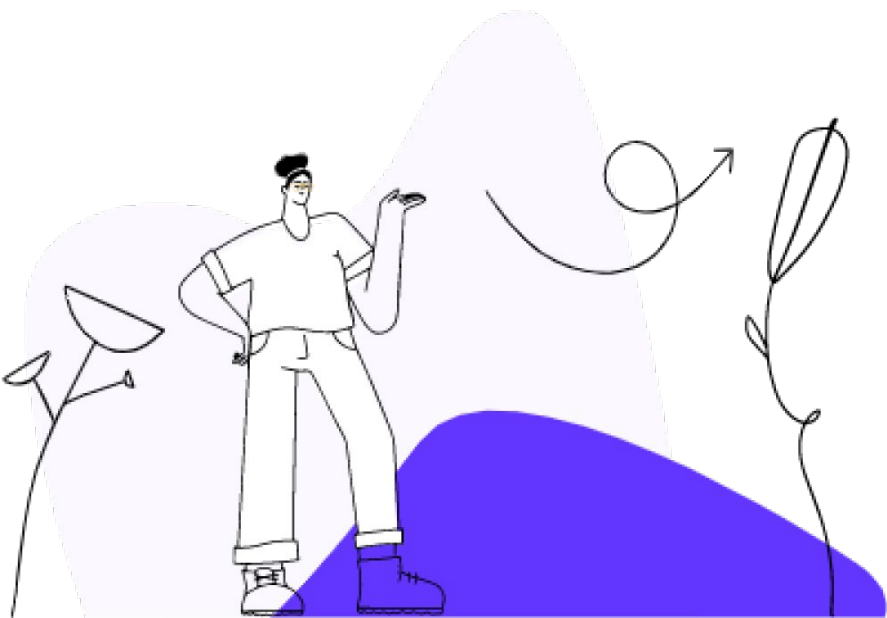
Design research and explorations on best content delivery format that consumers would prefer;

03



## Documentation:

Key design decision log.



**Thank you!**