



BLACKFINCH

Blackfinch's Galapagos CRM system is a cloud based customer relationship manager tool, optimised for desktop and mobile devices with option to transfer into a future SaaS product.

Date: 2019/20

Client: BlackFinch Investment, Gloucester





What makes this project unique?

Galapagos is not just a simple CRM, but a very bespoke system with tons of additional advisor friendly solutions and modules, such as Geographic Distance Search, Participation Manager and mobile optimised document generator. Most of them are brand new requirements, there are no similar existing tools on the market.

Roles & responsibilities

- UX/Product designer & Product owner
- Conduct and analyse user research sessions
- Develop paper and digital wireframes
- Create low fidelity prototypes for multiple functionalities
- Agile/Scrum integration and support the development team
- Usability testings

Uncover pain points Plan and conducting user research

- 01 USER RESEARCH
- 02 MAPS & FLOWS
- 03 USER JOURNEY
- 04 PROTOTYPE
- 05 SPECIFICATIONS

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USER RESEARCH/INTERVIEWS
Interviews with advisors to uncover their requirements and understand their process



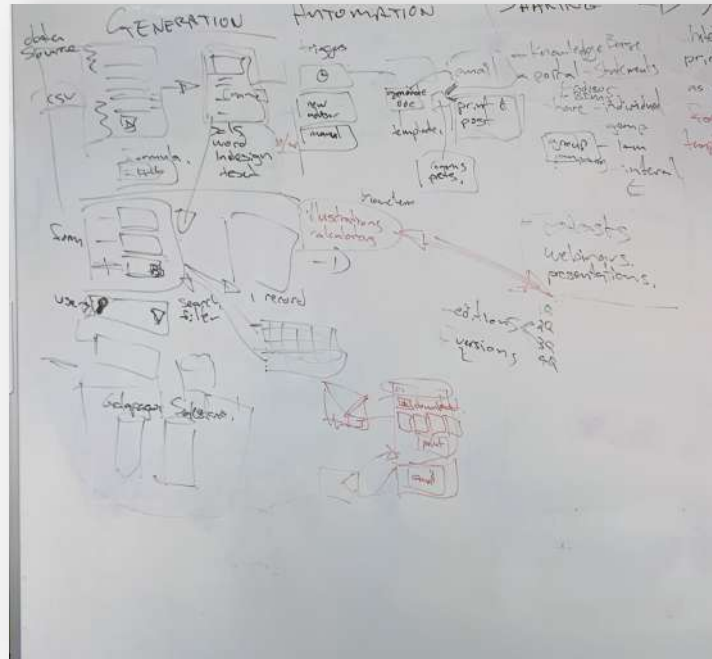
DIGITIZE THE PROCESS
Transfer advisor manual process into digital workflow, simplify the process

Uncover and mapping new features

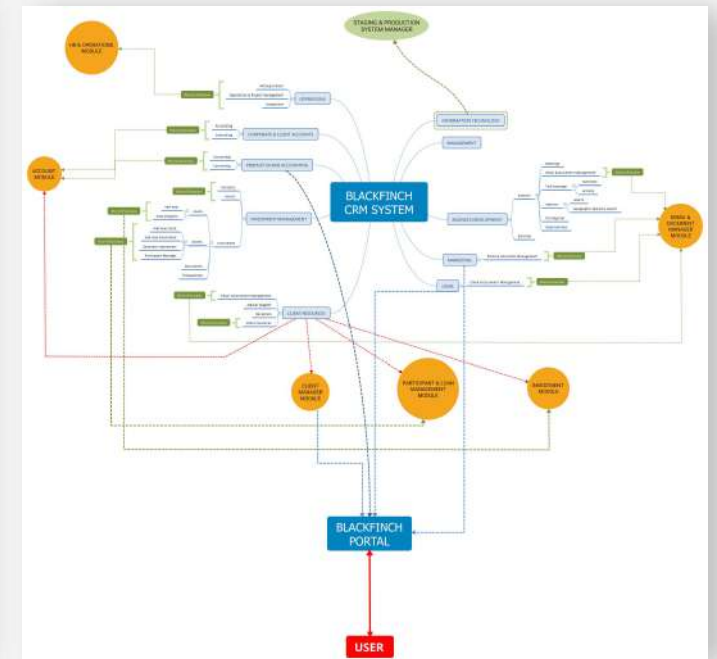
Deliver feasibility studies

- 01 USER RESEARCH
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BRAINSTORMING WORKSHOPS
Lead idea workshops to uncover new features and integrate into the new system

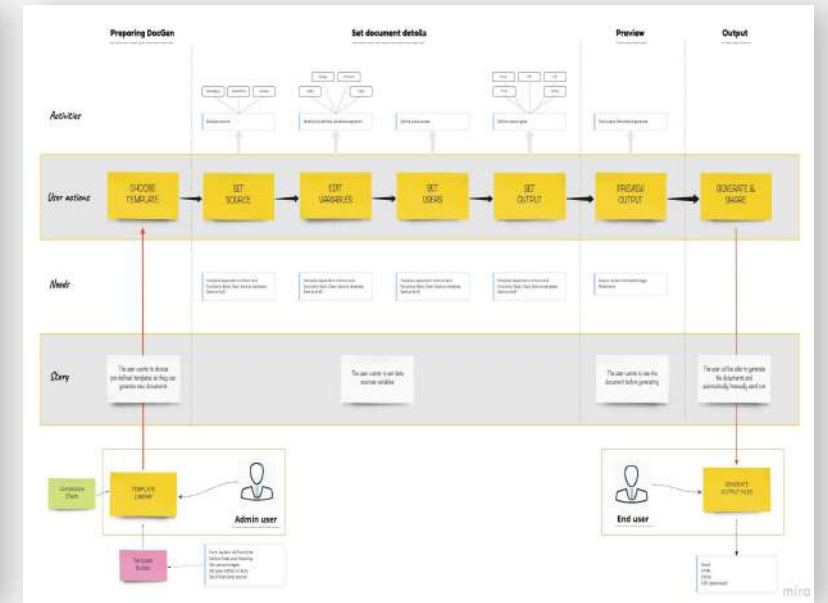
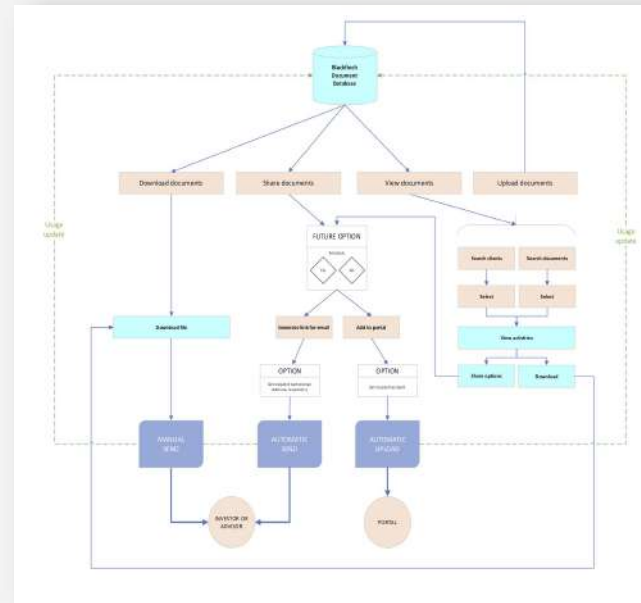
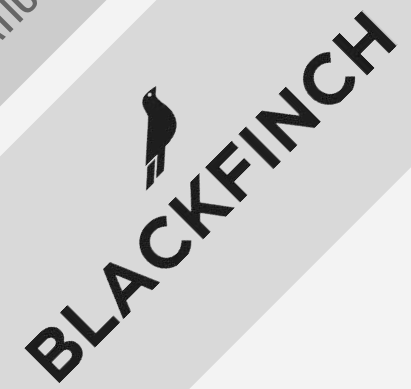


MODELLING NEW FEATURES
Define process flow, propose new features, Maps and full functional analysis

User research and analysis

Simplify user journey and page map

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USER RESEARCH AND JOURNEY/MAPS
Provide simplified process flow and clear user journey for new and existing functions

Creating wireframes and prototypes

Design/css/html and interactions

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BLACKFINCH
STAGING

UNKNOWN USER

CMS

My Work

FCA Register

Opportunities

ADVISERS

Search: [] 19700 results

INACTIVE (19700)

NAME	FIRM	ADDRESS	POSTCODE
Osobio Egidio	Dutty Independent Financial Adva...	1V Drum Teyrol, FEAL, NELL, N...	TA6 3DD
Sharon Monk	Old Mill Financial Planning LLP	Oldmills Wtds, Wtds, NUL...	BA20 1AH
Raminder Lohar	Mazars Financial Planning Ltd	36 Underways 160 Pagnudged Am...	MK3 1FF
Mandy Turner - left company	Broadlands Partnership Limited	41 Ridem Gosun, FEAL, NUL...	CF64 1EX
Iqbal Dwyg	Zeus Wealth Management Limited	4b Seon Pysunllas Hwy1 7278...	EC4Y 1HF
Mark Howard	Active Financial Partners Ltd (AFP)	5 Brycs Fulk Meryth Oab, Fth...	PD7 7SE
Paul Felwy	BDO - Bristol	Xindylaga Gloyt, Mynnal Tey...	BS1 6SK
Ian Culum	Dutty Independent Financial Adva...	Avnshing Pmearny, Utwzem St...	TR26 1ED
Jane Beauchamp	Old Mill Financial Planning LLP	Oldmills Wtds, Wtds, NUL...	BA20 1AH
Ian Gagg	Veon Independent Financial Plann...	NUL, FEAL, NUL, NUL, FEAL...	NUL

ADD NEW ADVISER

ADD NEW FIRM

Map Satellite

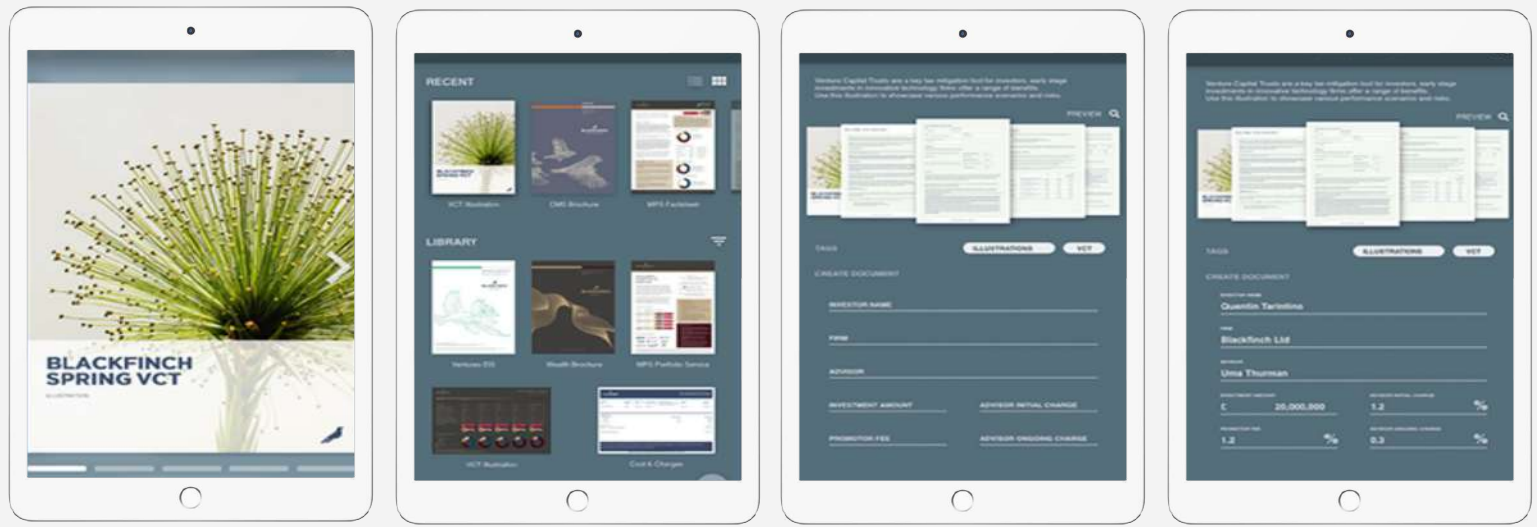
United Kingdom

LOW/HIGH FIDELITY PROTOTYPE (GALAPAGOS CRM, DESKTOP)
Deliver prototypes in all required fidelity and create interaction design

Creating wireframes and prototypes

Design/css/html and interactions

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LOW/HIGH FIDELITY PROTOTYPE (MOBILE DOCUMENT GENERATOR)
Deliver prototypes in all required fidelity and create interaction design

User stories and acceptance criteria Agile/scrum specifications & integrations

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BLACKFINCH

Geographic Distance Search

Jira ticket: <https://blackfinch.atlassian.net/browse/SAL-143>

UX Subtask: <https://blackfinch.atlassian.net/browse/SAL-534>

Description

The major requirement in this phase is to create a nearest advisor feature with a geographical distance search function. Currently BDMs are using Google maps to identify the nearest advisor and create new client meeting. The current solution is far from perfect, as very manual, needs strong knowledge about the advisors. As Franklin said: he is ok with this, because he was doing this a long time ago, so he has the necessary knowledge on the available advisor. But for the new starters, almost impossible or at least very time consuming.

- Phase 1 - Distance search function
- Phase 2 - Automated update and notification system
- Phase 3 - Google Route Planner, automated advisor rating system

The 2nd and the 3rd phase are not yet confirmed, but these functions would be nice to have on longer term.

Users/Stakeholder

- User: Business Development Team
- Stakeholder: Anna Carter, Leo Franklin

User story

As a BDM user I want to use a distance search function, so that I can find the nearest advisor for client meetings.

Acceptance Criteria

Sharepoint document management system

Jira ticket: <https://blackfinch.atlassian.net/browse/SAL-504>

Description

This section will allow the user to use the integrated SharePoint document library.

The documents must be stored in SharePoint or ShowPad.

To manage (SharePoint or ShowPad) document library content needs a different access level and different tool.

Stakeholder for the DMS: not discussed

Users/Stakeholder

- User: Business Development Team
- Stakeholder: Anne Carter

User story

As an IBDM user I want attach files from the document library which are the latest/compliance-approved versions integrated from the DMS

Acceptance Criteria

- The user should see a 'Document Library' button at the right side at the Email Composer panel. The button needs to contain a SharePoint logo as well.
- The button triggers a dropdown module. A little arrow icon must show the open/closed stage of this dropdown. If the user clicks this button

Assign & Share Documents to advisors/investors

Description

The major requirement is to discover and model different assign and share scenarios. Combined with the self-service illustration creation for IBDMs, this **Assign & Share** feature would be a massive workload reduction for Client Resources.

Users/Stakeholders

- User #1 Business Development Team: Anna Carter, Leo Franklin
- User #2 Client Resource Team: Eloise Jackson, Jade Marshall

The users can share the generated documents on the following ways:

1. Download
2. Direct share
3. Share from document database (for existing documents)
4. Packages/multiple docs **FUTURE OPTION**

Download

With the **Download** option, the BDM user will be able to download the generated file directly to their computer, then the user will be able to attach and send the file in email directly to the advisor or the investor's email address at any time later.

Options

- Encryption required / not required **REMOVED**

Mark's addition - All files to be stored encrypted, no password protection on documents required - managed by users if they require it.

Direct share

USER STORIES & SPECIFICATIONS
Deliver user stories and acceptance criterias, integrate into Agile/Scrum sprints using Jira