

### Project Background

#### What is the overall purpose of this project?

Portal Company has engaged marchFIRST to provide recommendations regarding the redesign of their current corporate web site for the launch of the Aug. 15<sup>th</sup> Company's New Product.

Client has requested that we focus on the product section of the web site and on what can be accomplished by the 15<sup>th</sup>. Other recommendations regarding future enhancements are also welcome, but should not be the immediate focus.

#### What is the goal?

The goal of an Aug 15<sup>th</sup> site redesign is to leverage interest generated by the Product Launch public relations campaign. Portal Company will publicly announce the Company's New Product through trade media, targeting communications to the facility administrator and potential investor. Audiences will be driven to the web site for more information regarding the product and the company.

There are two goals:

- 1.) The web site will drive the audience to call Portal Company; it's a lead generation tool for the direct sales force.
- 2.) The web site will attract investment capital.

Goal #1 is focused on the Retirement Community/Senior Living Facility Administrators (CEOs, MIS, Marketing, Resident Life senior staff). The goal is that they will use the web site's contact form to request a visit from a Portal Company sales representative regarding the Company's New product.

Goal #2 is focused on potential venture capital investors. The site should "show muscle...show that Portal Company is a large, well-capitalized, capable company."

#### What are the marchFIRST key deliverables?

NOTE: This does not represent the full marchFIRST methodology and will only provide a short-term solution and temporary redesign of the web site. Our recommendation is to undergo a more formal design phase following the Aug 15<sup>th</sup> event that is more closely based on the brand strategy and marketing communications message as developed by the Cincinnati team.

For the Aug. 15<sup>th</sup> deadline the following short-term activities will be employed:

- Client interview (held on Tuesday 18<sup>th</sup>)
- Review existing web pages and provide design recommendations
- Brief review of industry, company and competitive research (include product competitive as well as venture capital competitive).
- Integration of brand strategy as best achieved within the short timeframe
- Revised Site Map and Content Recommendations

- Design research and explorations (In conjunction with Cincinnati marketing communication strategy and design).
- Design conceptions (immediate short-term revisions to existing pages)
- Re-work existing HTML web pages and development of additional web pages as needed.
- Development of content including copy or photography as needed to support design recommendations.

#### Are there any company issues that should be considered for this solution?

The Cincinnati design team is working on an overall branding and marketing communication campaign including a corporate video and other vehicles. The design and communication message as laid out by Cincinnati should be incorporated into the web site redesign as best we can within the time constraints.

#### Are there any industry trends that should be considered for this solution?

The target market for the product (seniors) is untapped and unproven although interest in this area is growing. Many believe that this is the "next big thing," for the Internet, similar to the growth of women-centric portals in the late 90s. However, Portal Company will have to first convince their audiences of this BEFORE introducing the benefits of the Company's New Product.

#### The Target

Who are the target users and user communities we want to attract and interact with?

##### **Primary Target:** Facility Administrators

- Retirement Community / Senior Living Facility Administrators including CEOs, MIS, Marketing and Residence Life Directors.
- Facility type is upscale, modern providing the "best" in retirement living with 200+ residents
- Only a small percentage of administrators are "forward thinking" and already realize that this type of product is needed; these administrators are typically at facilities with 1000+ residents.
- Facilities provide care to seniors who are independent, sharp and do not need assistance as well as assisted living for those who need "a little help"
- Facilities DO NOT provide nursing care
- Facilities are competitive and concerned about "increasing occupancy rates" – they do this by "quality of life improvement" for residents

##### **Secondary Target:** Venture Capital Investors

- Looking for the next big Internet trend – will be presented many times with different "trends" and will be looking for substantial facts and data to be convinced
- Review many Internet-related business plans daily; will only have a few minutes to devote to reviewing the web site and product
- Need to be convinced that the senior market will be lucrative, and then convinced that Portal Company has the right model to serve that market

- May look at 3 – 4 other competitors in the market and compare sites; the graphical appearance and sophistication of the site will be a large part of their decision

*Because the Investor audience is important to Portal Company, marchFIRST recommends exploring the development of an Investor Relations pathway. Although there are pros and cons to this pathway have already been discussed, we believe that the items warrants further discussion with BlueVector before making a final decision.*

#### **Third Target: Seniors**

- Retirement Community residents who may be independent or need little assistance
- Sharp, healthy, vibrant adults who thrive on a sense of community
- Likes civics, citizenship, social games, interaction with others
- Seeking independence, choice, but like structure, hierarchy, schedules, order
- Thrives on information, wants things that are simple to use
- Has some impairments – vision, hearing, cognition
- Dislikes jumpiness, ambiguity, edginess (no MTV)
- *Please see the End-User Brand Strategy full detail on this audience*

#### **Additional Audiences**

##### Family Members

- Family Members of Seniors living in the facility, likely the person who is paying for or has some influence on deciding which facility the relative will live in
- Looking for “peace of mind,” wants to make sure relative is receiving the best quality of life
- Experiences guilt because does not visit the relative as much as they think they should
- Looking for more convenient ways to keep in touch with the relative without the physical visit
- Easily recognize the benefit of the product, need to understand why Touch Town is the best choice.

##### Industry/Business Press

- Looking for information regarding industry or business trends, will be looking for insight into the senior market

##### Portal Company Direct Sales Staff

- Looking to use the web site as a tool to support their efforts

##### Potential Portal Company Employees

- Will be reviewing the web site to make decisions about future employment with Portal Company

Although these audiences are not key targets, they are important users of the web site. For the most part, their needs can be addressed through the same execution as the Administrator and Investor audiences. Content specifically for these audiences will need to be provided, but the design execution can be the same.

#### What other insights do we have about these target users and user communities?

Although Facility Administrators and Investors are the top two targets for the web site, Seniors and their families – the end user of the Company's New Product – may also be driven to the web site through the publicity or other means (search engine, word of mouth). Although this audience is not the direct purchaser of the product, it influences the administrators' purchasing decisions.

#### Design Considerations

Seniors in particular have special web site viewing needs such as larger type, obvious button-like navigation and high contrast colors – elements that have a tendency to make the site look amateurish or home-grown.

Because of a distinct difference between the audiences (administrators/investors versus seniors/families) a site design strategy needs to be devised that is almost contradictory in nature. Administrators and investors will be looking for sophistication, breadth, depth and demonstrated "internet-mastery" – i.e. this is an internet company that really knows how to take advantage of the net. While the design for seniors will need to be simple, uncluttered, and overly explanatory.

A site design that allows for this dual design would need to be implemented. There should be a "**Corporate Site**" with information regarding Portal Company such as the management team, news, etc and a "**Product Site**" with information about Company's New Product specifically. With this dual pathway design, each path can be given a similar, yet different treatment – the same colors and graphic elements can be used but applied in a more sophisticated manner on the Corporate Site and a simple manner on the Product Site.

For example, the same left-hand navigation bar can be used. On the Corporate Site it will be smaller, with rollovers and pop-up menus but on the Product Site it will be larger buttons without rollover or pop-up menus. The same color, font and style would be used - they would be executed differently.

The Company's New Product Site should be focused on the features and benefits of the product as related to the end-user target audience - seniors. It would be more demonstrative and illustrative of the product itself. In this section of the site, you would bring the product to life with screen examples and photography of people using it.

The Portal Company Corporate site should also have information regarding the Company's New Product, but focused on the benefits the product brings to the facility, not the end user. This section of the site would need to have more justification for the product, bringing financial or other quantifiable benefits to life via charts or graphs.

**The Experience**

*How do we want the user to describe their online experience?*

*What is the essence of the experience we want to impress upon the users?*

**For Administrators/Investors**

The Corporate Site should reflect simple elegance in site structure and design. Information is presented clearly, effectively – in a sophisticated wrapper. It should demonstrate a smart application of Internet technologies, e.g. use of animation or interactive elements when appropriate to content, not just for show. If the web site was a car, it would be like driving a Lexus SUV versus an AMG Hummer (who really needs to drive an Army vehicle around America?).

**For Seniors**

Seniors should be able to navigate easily through the Product Site. Information should be easy to understand – within a few screens the user should get the “ah, I get it” feeling. The senior would feel in control – and that it was easy. The site itself needs to be as easy to use as the Company’s New Product.

*What is the most important thing we want the user to take away from this experience?*

*If nothing else, what core message should the users understand after experiencing the site?*

**For Administrators/Investors**

That Portal Company is a forward-thinking company, on the forefront of the next big Internet trend. That the Company’s New Product is well thought out and designed – meeting an administrator’s needs as well as the users. That Portal Company understands its audience, is savvy about applying Internet technologies, and it’s the ONLY true provider in the senior market.

**For Seniors**

Simple Independence. Portal Company lets seniors go beyond boundaries, and complexities, of today’s communications by allowing them to experience the independence of the online world, with a product designed to be almost as simple as a phone.

*How can we support this promise through our understanding of:*

*The Brand*

Portal Company stands for “Simple Independence”

*The Site Content***Corporate Site**

Corporate Site should have an introductory tone, be clear and concise, and persuasive. Portal Company should come across as the expert in the senior market. As a seasoned and solid professional. Use of statistics, charts, and visuals to demonstrate the power and size of this market would be helpful.

The content needs to be persuasive. It should create a need for the product, and then that Portal Company Company's New is the best product to fulfill that need.

**Product Site**

The Product Site should have an introductory tone. The copy should remain emotional not functional in nature. It should focus on the benefits to the senior, giving them independence and choice. It should educate and demonstrate ease of use.

For the Product Site, it is recommended that pictures and testimonials be taken during the field trials to provide "third-party" credibility to the product. There should be seniors smiling, happy and enjoying using Company's New.

Please see the Creative Brief for the End-User Video for additional information regarding content points targeted to Seniors.

**Demonstration**

The site should contain in-depth information about the functional features of the web site as well as a product demonstration. The demonstration could be password protected so that competitors cannot access it and it could be used as incentive for the lead-generation tool.

The site could address that the demo exists and that the user needs to complete a contact form to obtain a password and access to the demo. Portal Company can then collect leads in this manner and allow audiences to explore the product even further if that is needed to make their purchasing decision.

Keep in mind, the product demonstration should NOT be in such detail that it would replace the need for a direct sales contact.

*See the attached site map for suggestions regarding specific content sections.*

***The Site Navigation***

The home page should be very simple and offer distinct pathways for each target audience. It should be very clear to Seniors where to click for information about Company's New. And give Administrators/Investors straightforward access to the information that interests them most. Too many choices on this page would adversely affect the entire experience. There should be two distinct sections – Seniors and their families click in one area to find out more about Company's New, and all others click in another section to learn more about Portal Company.

As stated earlier, navigation design can be similar for both pathways just executed in a different manner.

Please see the sitemap for more information.

Portal  
Company.net

Omega Corporate Center  
1000 Omega Drive, Suite 1430  
Pittsburgh, PA 15205  
800.426.7767 voice  
412.859.6696 fax

Corporate Web Site  
Redesign

#### *Design Criteria*

Keep the following in mind when designing the site:

Simple  
Elegant  
Solid  
Technology applied “smartly”  
Leader  
Clean  
Clear, uncluttered  
Friendly  
Inviting  
Sense of community, involvement

#### **Recommendations & Constraints**

##### **Design**

*Are there any graphical and typographical recommendations?*

Make it easy to use, friendly and inviting – yet give a sense of simple sophistication

*Are there any existing identity assets that need to be integrated?*

*Color schemes, photography, images, typography, logos, logotypes, etc.*

Because of the short timeframe, we need to begin with the existing web pages. We will make alterations to those pages but stick with the basic structure, design, colors, photography and logo. Changes will include font style, size, wrapping of text, menus, etc.

##### **Content**

*Are there any content requirements that could impact design?*

Not that we are aware of at this time.

*What automated content will be integrated and where will it come from?*

None

*How will content be generated?*

Portal Company has a majority of the content already placed in the existing web pages. New content can be generated by Portal Company and/or marchFIRST as determined during a content definition phase.

##### **Visual Experience**

*Are there any specific characteristics of the target user group(s) that could impact design?*

See paragraph about design constraints for Seniors above under “other insights”. Also, ensure that the Senior section of the site is consistent with the their brand interaction that the end-user has.

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**Site Build Constraints**

**What is the target browser and operating platform for this project?**

Windows 95+ platform. The target browsers will be Internet Explorer and Netscape 3.0+.

A version that is compatible with the Company's new browser will need to be developed in a project after the launch date.

**What are the access rates and resolution constraints?**

Assume a 56.6k connection for Administrators and a slower connection for Seniors. Design screens to 600 x 800 pixels and 256 colors.

**What are the specific technical tools that can be used for this solution?  
(Plug-ins, languages, packaged technology solutions)**

To be viewable on the Company's New Product, the code will be written in HTML 3.0.

To meet the targeted standards for the corporate audience it will be necessary to use sophisticated coding. This coding may not be compatible with older versions of HTML. We suggest producing a second site after the August 15 launch to accommodate HTML 3.0 standards.

**Resources**

**What other resources can I use to learn more about this project?**

- [www.Portal Company.net](http://www.Portal Company.net)
- End-User Brand Strategy (provided by Cincinnati)
- End-User Video – Creative Brief
- Binders provided by client

***Who do I need to contact to get these resources?***

Raelin Sawka Musuraca, Creative Lead, Pittsburgh

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

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