

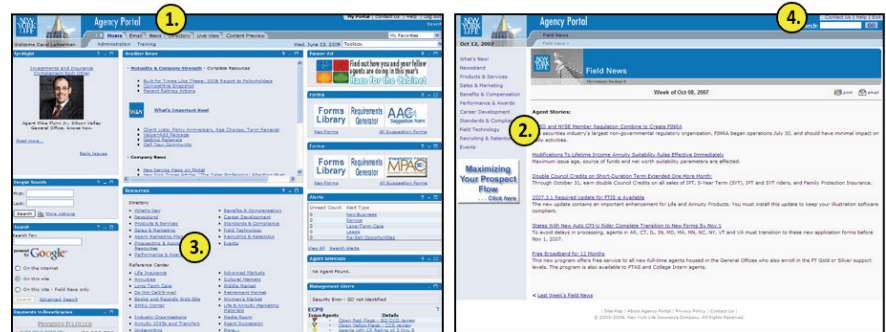
Case Study: Agency Portal

Problem Definition:

As part of a rebranding initiative the usability of “Agency Portal”, a dedicated resource for New York Life Agents, was initiated to improve and update Agency Portal.

Through heuristic evaluations, focus group sessions and user tests with

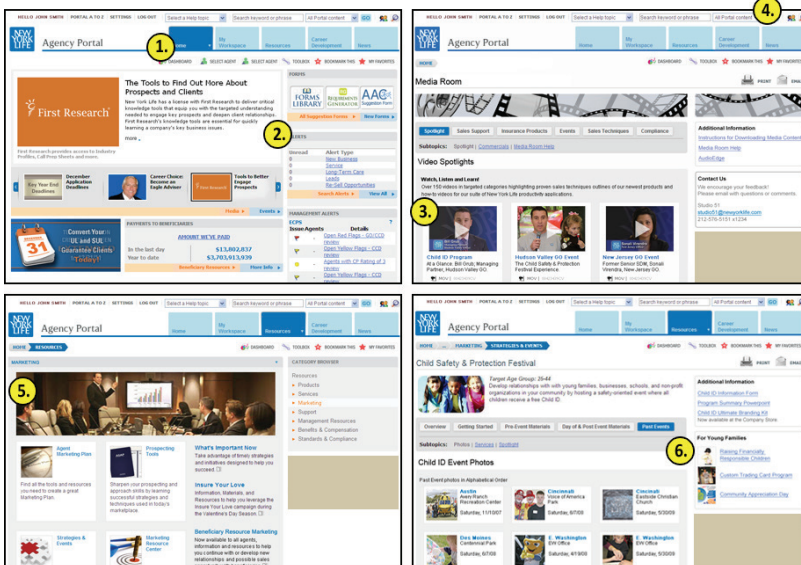
Agents and Agency Staff it was determined:



1. Navigation between the homepage (portal technology) and content pages (Vignette content management) was inconsistent.
2. The information architecture on secondary navigation (content pages) was confusing.
3. Deep navigation into content produced pop-up windows making it difficult to navigate between the homepage and content pages.
4. Search did not behave as expected.
5. The agents polled through user testing and focus groups wanted a streamlined experience, making content easier to find and quicker to obtain.

Methodology:

- Card sorting exercises with over 50 agents in multiple locations and via online interactive tools were held to determine how to best re-organize the content.
- Wire frames were created to maximize the layout and functionality contained on site pages
- Iterative user tests were performed with users.
- Site pages and templates were designed based on the feedback received.
- Symantec HTML was developed to support the effort.



Outcome:

1. A consistent navigation set for both the homepage and content site was created with a revised site architecture making it easier to navigate through major categories.
2. A rotating feature area to highlight content was created.
3. Consistent video templates were designed
4. A refined categorized search with implements.
5. Templates with configurable feature areas were designed.
6. A sub navigation structure for stand-alone content areas was developed.