

CASE STUDY • AIG: AVANTRUST RELEASE 1



SUMMARY	Launched an initial Web presence for a marketplace insurance solution within 75 days
GOAL	To develop a site that would provide a single look and feel for 5 different products using the backend systems previously built by the client
ROLE	Web Producer • Lead Information Architect • User Interface Tech Lead
USER PROFILE	Marketplaces • Corporate Financial Departments • Shipping Departments
BUDGET	~\$500,000
TIMELINE	2.5 months
DELIVERABLES	Site Map • Page Schematics • Design Comps • Web Site • Marketing Content • Web Style Guide • Branding Style Guide



CHALLENGES	<ul style="list-style-type: none">• Site identity, including name and visuals, needed to be developed<ul style="list-style-type: none">• Branding issues remained unresolved by 30 day deadline (required 45 day deadline)• No client marketing department available to give direction• Potential users not available for feedback; relied on perspective of product managers and analysts• Deadline for final user interface design was within 2 weeks of project start date; interface could be only slightly modified during the development cycle• Existing backend systems could not be significantly modified for enhanced features or usability
SOLUTIONS	<ul style="list-style-type: none">• Developed and implemented a project plan that allowed simultaneous user interface and identity development<ul style="list-style-type: none">• User Interface team developed a template that would be compatible with any of the first round branding elements presented to the client• User interface and identity teams met regularly to ensure compatibility• Based main site navigation upon the products required at each step of the process when completing a marketplace transaction (e.g., identity checking is first, etc.)• Developed marketing materials to provide users with an overview of the product offering• Included in the user interface design an “instructions area” for users unfamiliar with the products
RESULTS	<ul style="list-style-type: none">• Project launched successfully on time• At launch, client signed on 3 marketplace partners who integrated the products at their sites• At launch, Dun & Bradstreet signed a partnership with AIG to provide identity services



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CASE STUDY • AIG: BROKER PORTAL



SUMMARY	Developed a portal for Web site insurance offerings
GOAL	To develop a presence that would allow brokers and potential clients access to marketing materials and applications using the forms and technologies developed for the AIG netAdvantage product during the Avantrust Release I project
MY ROLE	Web Producer • Lead Information Architect • User Interface Tech Lead
USER PROFILE	Insurance Brokers • CTOs • CIOs • CFOs • Web Site Managers • Risk Managers
BUDGET	~\$100,000
TIMELINE	6 weeks
DELIVERABLES	Page Schematics • Design Comps • Web Site • Marketing Content



CHALLENGES	<ul style="list-style-type: none">• Site users not available for feedback; relied on perspectives of product managers and analysts• Site was missing a homepage to give the site a portal look & feel and encourage membership• Online policy application for Avantrust RI did not support AIG browser standards• AIG technical and browser standards to support IE, Netscape and AOL (W3C HTML 3.0 Standard) needed to be observed 100%
SOLUTIONS	<ul style="list-style-type: none">• Developed a homepage that allowed users to login to the site or register for membership<ul style="list-style-type: none">• Introduced a vertical market focus for the product offerings (risks coverage over individual insurance product offerings)• Incorporated a Flash movie that presented risks mitigated by the product offerings• Highlighted newsworthy products and services• Redesigned the policy application form to more closely reflect the offline process, assisting the user determine which policy best covered his or her risks<ul style="list-style-type: none">• Included a 5 page questionnaire for contact information and a needs assessment• Allowed the user to complete the form real-time online, OR, return later to complete the application form, OR, have an AIG representative call back to gather the information from the prospect insured
RESULTS	<ul style="list-style-type: none">• AIG (brokers and site managers) noted that the form was easier to access and complete• At the site, all pages were within 4 clicks from the homepage• Site goals to get new members and completed forms achieved<ul style="list-style-type: none">• 579- homepage, 86 - login to the site, 44 - register, 35 - submit an application, 30 - request an online assessment• Site met AIG technical standards



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CASE STUDY • AIG: AVANTRUST RELEASE 2



SUMMARY	Expanded the functionality and enhanced the design of the Avantrust product offering
GOAL	To develop project infrastructure to support the size and scale of the project
MY ROLE	Internal Project Liaison
USER PROFILE	Consultants • Managers • Project Managers • Managing Directors
DELIVERABLES	System Implementation • Documentation • Training



- CHALLENGES**
- Large initial team (~30 people) continued to grow to over 60 professionals in the design, engineering and business teams
 - Team members were working from the client site, the KPMG consulting offices (New York, Boston, and San Francisco), or their homes
 - Daily meetings with the client regarding business requirements document required multiple changes due to client changes in focus and scope
 - Changes needed to be tracked and coordinated for consistency and streamlined communication between the business and engineering teams
 - Project deadlines required multi-tasking by all members, as well as frequent, clear communication and directives
- SOLUTIONS**
- Implemented a Web-based document management system to track document versions, owners, and edits
 - Broadened the use of the source control system to manage prototype drafts
 - Developed training guides and seminars for project infrastructure technologies used
 - Implemented an instant messaging system (AOL IM) and developed standards for its use on the project; through documentation differentiated its utility from email and cell phones
 - Steered daily team meetings (conference calls) to track outstanding issues
 - Posted project vision & goals, team rosters, project schedule and weekly tasks lists/deadlines on main whiteboard
- RESULTS**
- Eliminated multiple versions and owners of documents, enabling more efficient document delivery to clients (i.e., 2 hour prep time vs. 10 hour prep time)
 - Reduced the number of daily outstanding issues (from 30 to 10) through daily team meetings
 - With the document management system, enabled the engineering team to access the current requirement documents allowing iterative and adaptive development cycles
 - Through AOL IM, cell phones, teleconferencing and email usage, enabled almost immediate access to team members for resolving open issues and decreasing resolution time



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CASE STUDY • AIG: CUSTOMER SERVICE SITE



SUMMARY	Developed support Intranet for Avantrust application
GOAL	To ensure that the site required minimal training for staff and mapped to support operations
MY ROLE	Lead Information Architect
USER PROFILE	Avantrust Customer Service Representatives (CSRs) • Avantrust Management • Avantrust Executive Team
DELIVERABLES	Site Map • Page Schematics



CHALLENGES	<ul style="list-style-type: none">• Avantrust product had decentralized support<ul style="list-style-type: none">• 5 distinct URLs for product support• No documentation existed• In some cases, system administrator was required to make customer record adjustments• Managers had no access to reports and operational data• Staff not able to readily access customer data
SOLUTION	<ul style="list-style-type: none">• Co-managed development of interim user manuals for CSRs until final solution developed• Identified user groups and data access privileges (CSRs, managers, executive team, system administrators)• Mapped process for accessing records and making policy changes<ul style="list-style-type: none">• Co-developed 4 solutions that met all requirements; client chose most robust option• Designed site to follow the call flow (questions, etc.) to access data as needed in the call• Presented account information based on information that would be readily accessible to the customer• Client data key was Avantrust ID; policies were all associated with ID so customers did not need to necessarily know specific policy numbers
RESULT	<ul style="list-style-type: none">• CSR able to better guide the customer through the support process• Intuitive design required no systems training for new staff• Information more accessible to staff to better support customers even on high-call volume days

