

CASE STUDY • MORGAN STANLEY



SUMMARY	Developed an Intranet for brokers to access up to 20 sources of financial and news data
GOAL	To develop a navigation system and user interface design for users to access data using Morgan Stanley's Web Style Guide as a basis
MY ROLE	Web Producer • Lead Information Architect
USER PROFILE	Stock Brokers • Managers • Directors • Morgan Stanley Employees
BUDGET	~\$120,000
TIMELINE	3 months
DELIVERABLES	Site Map • Page Schematics • Graphics (outside firm) • HTML Pages



CHALLENGES	<ul style="list-style-type: none">• Client used an independent design firm to develop the user interface; a consultant was required to actively manage the relationship, development process, and deliverables• User goals at the site were not clearly defined• No processes were implemented for developing the user experience; determined that the team (client and firm) needed an overview of a process and deliverables for success
SOLUTIONS	<ul style="list-style-type: none">• Hosted a workshop with active participation by the client to develop site goals, to determine main functionality, and to decide upon the navigation system elements• Developed a site map and page schematics to better illustrate the page “look and feel”<ul style="list-style-type: none">• Determined the main function of the site to be “search” with the main headings Search, Advanced Search, News (homepage), Other Sites (directory to Morgan Stanley sites), People (this area was put on hold)• 4 data fields required to execute Search: keyword, company name, date range, source• Included instructions to help users with questions about Boolean search capabilities• Outlined the deliverables for the design firm, collaborated with them to implement the navigation structure according to the Style Guide, and managed delivery
RESULTS	<ul style="list-style-type: none">• Decreased the number of tabs originally proposed (originally one for each source (20) down to 4 for 3 types of searches, News and Reference Site)• Reduced search to a 4 step search process that was consistent with all search types and was able to be slightly modified for later search additions (like a people directory search)• Included directions on page to help first-time users• Delivered projects on time and within budget

