

CASE STUDY • SALOMON SMITH BARNEY



SUMMARY	Strategy project through KPMG Consulting to develop a concept site for a corporate Intranet to eliminate the use of multiple sources and screens of data
GOAL	To develop a demo that included customization and personalization features in support of the strategy developed
MY ROLE	Web Producer • Lead Information Architect
USER PROFILE	Stock Brokers • Sales Managers
BUDGET	\$30,000
TIMELINE	2 weeks
DELIVERABLES	Site Map • Page Schematics • Design Comps • Web Site Demo



CHALLENGES	<ul style="list-style-type: none">• User interaction limited<ul style="list-style-type: none">• Met directly with KPMG consultants to understand workflow practiced by stock brokers• Passively observed users completing day-to-day tasks• User experience team located in San Francisco; led team from client offices in New York
SOLUTIONS	<ul style="list-style-type: none">• Developed a demo, consolidating up to 3 user interfaces into one, which included the following features:<ul style="list-style-type: none">• Personalization and customization profiles based upon a user's role in the organization and chosen interests (e.g., user could change preferences including type of data received, such as news feeds based on specialized, regional interests)• User could view a personalized calendar of events targeted at his or her interests as well as a "visual" stock performance chart using his or her key picks• Tasks appeared in the lower left screen with access and privilege based upon user profile; once a user completed a task, the next individual who, according to his or her profile, would need to complete the next step of the transaction would be notified• Maintained communication with San Francisco team through frequent (3x+/day) communications via teleconferences, Web, email and fax
RESULTS	<ul style="list-style-type: none">• Developed close relationship with KPMG consultants, enabling better communication of proposed design to client• With the KPMG team, developed a client presentation using the demo as the sample work• Delivered demo on time, within budget, meeting goals and expectations; provided support for minor modifications based on strategy changes



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