

Web development programme 2014

Some of the plans.....

- Design and navigational flow
- Improved member area
- Introduce functionality to support an online joining process



- Improved customer journey
- Ensure absolute clarity for our customers and fairness for our members
- Develop the recently launched member search functionality
- Develop the reporting capability of the site



The facts of where we are now....

- Seeing an increase in web hits to over 5k a month
- Refresh summer 2013 allowing customers to search on the different types of members for the first time
- Adviser search decreased the minimum radius options from 100miles to 10miles
- Introduced a county search to show customers who would come to their county
- Adviser searches returned both face to face and telephone based services together with distance
- Although not intended as a lead generator the member directory visits are a significant % of hits but intel is limited
- Responding to concerns raised by customers initially but no explanation of the roles was provided and name search proving problematic
- Unable to download the information so still meant the full directory had to be printed on demand manually – over 30 pages now
- Confusing and not used
- Not clearly defined and conflicting information

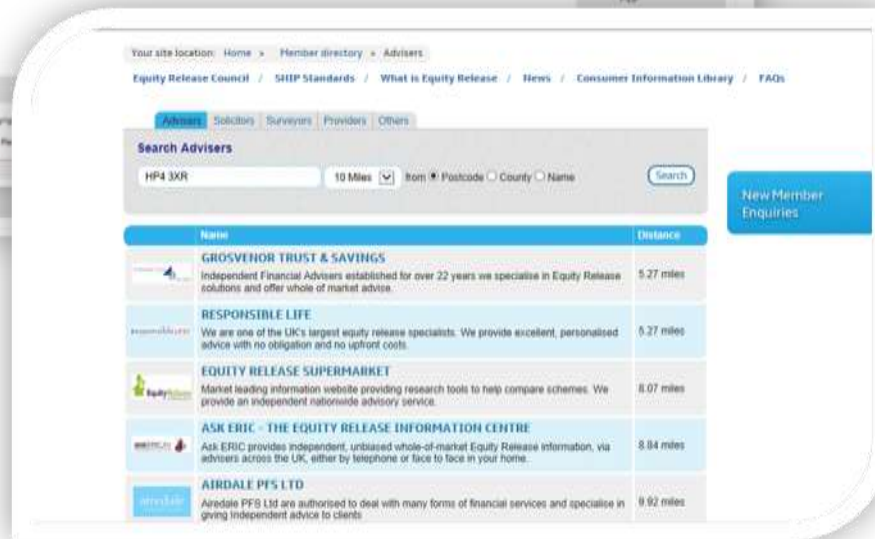
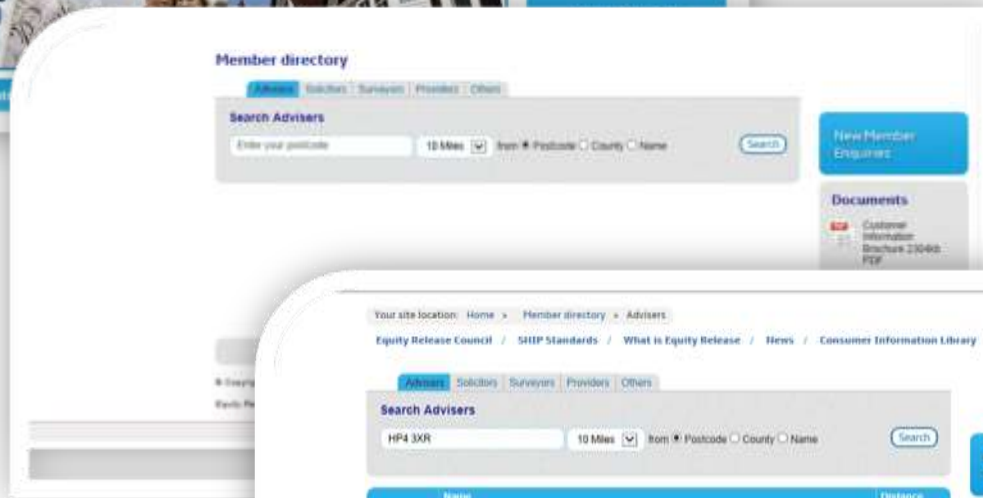
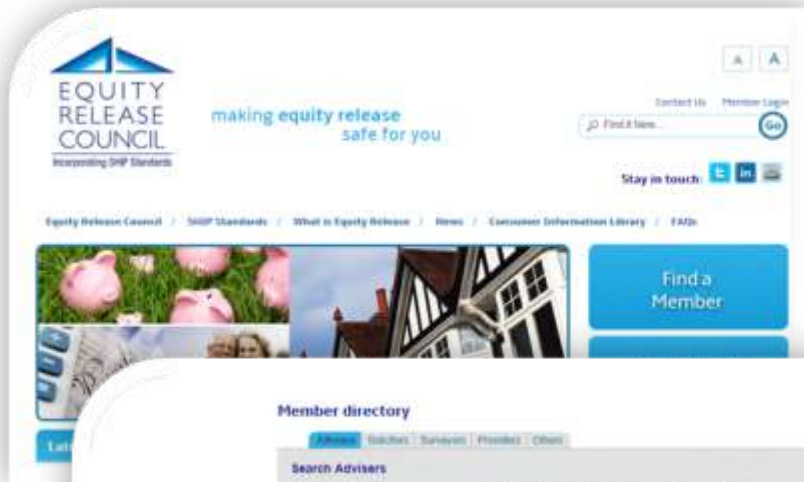
So how is this going to look?

Revisit the now.....

Step 1 – Navigate to ‘Find a Member’

Step 2 - enter a postcode parameter. No other information provided

Step 3 – returns listed are long and sorted by very specific distances



The evolution – how?

- Separate out name search so it can be done immediately and part name enabled
- Introduce preamble describing different member types and their pivotal role and filter service provision (face to face, telephone only)
- Postcode search: list only face-to-face providers and distance calculated but not displayed
- Better Google Analytics tracking
- Remove rarely used County search functionality but widen the exposure of member firms in the returns under the postcode search listings to compensate
- Display results: on a rotation basis whilst allowing the customer to order alphabetically via ordering link
- Export/print a list of search results and covering letter



Search going forward

- Separate name search
- Search by type with explanations of the importance of the roles
- Search by service provision
- Search by postcode

The screenshot shows the Equity Release Council website with a search interface. The header includes the logo, tagline 'making equity release safe for you', and navigation links like 'Contact us' and 'Member login'. A search bar is present with a 'Go' button. Below the header, there's a breadcrumb trail: 'Your site location: Home > Member directory > Advisers'. The main content area features a news item titled 'SHIP announces official launch date for new organisation'. Below this, a search section titled 'Search for members by name' is highlighted with a yellow oval. It contains a text input field labeled 'Name' and a 'Find' button. Underneath, a section 'Or filter through the Advanced Search' is also highlighted with a yellow oval. It includes a dropdown menu for 'Advisers' (highlighted with a yellow oval), a 'Face to Face' section (highlighted with a yellow oval) containing a 'Face to Face' dropdown, a text input field for 'Enter postcode' (highlighted with a yellow oval), a 'Distance miles' dropdown, and a 'Search by Postcode' button. Below these are 'Telephone Service' and 'Other' sections, each with a 'Read more' link. The footer contains contact information and copyright details.

New search results

- Clear indication of type of providers being listed "76 Telephone Service Providers"
- New two column randomised results
- Download results to PDF
- Ability to order results alphabetically
- Box height and width fixed, therefore summary text is truncated
- Pagination will appear beneath the boxed results
- Other Providers: outside the search criteria but are also available and willing to come to the area will be displayed below the line

The screenshot shows the Equity Release Council website search results for "76 Telephone Service Providers". The page features a header with the logo and tagline "making equity release safe for you". A search bar is visible in the top right. The main content area displays a grid of provider cards, each with a logo, name, and a truncated summary. The results are titled "76 Telephone Service Providers" and include options to "Download results" and "Order alphabetically". A pagination bar at the bottom of the grid shows "Page 1 of 8" and numbered links from 1 to 8. Below the grid, there is a section for "Other Providers" displaying a row of logos for various companies like Wendy's, Starbucks, and Key Retirement Solutions. The footer contains contact information and copyright details.

NB. The mockups are merely a visual guide for understanding, they are not designs to be signed off and then stuck to rigidly.

Next steps – what do you need to do now?

- Nothing.....
unless you are by definition of the search
providing a telephone advice service

Definition:

The provision of regular, significant volumes of telephone advice services that form part of your core business model. The service is underpinned and supported by an appropriate call centre function that has call recording, storage, audit and supervisory monitoring procedures in place. Any written communications are driven out from the system and are aligned clearly against the contact record



When will all this happen?

May-14	May week 1				May week 2				May week 3				May week 4				May week 5			
Council	Mbr Comms re plan and data			BH	UAT test plans produced				Test BE				data cleanse				BH	Test front end		
NetXtra	Back end dev			BH	Back end dev								Front end dev				BH	Back end fixes		
Members				BH	Data in				Data in								BH			
				BH													BH			
Jun-14	01	June week 1				June week 2				June week 3				June week 4						
Council		User acceptance testing (UAT)				UAT				Member comms re launch				Go live						
NetXtra		Front end fixes				Final tests and handover				Contingency				Go live						
Members						UAT				UAT				Go live						

Our knowledge, your success





Questions?

