

# User Experience Brief

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## About this Document

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This document is intended to provide the following for the Crowley Website Redesign project:

- A summary of the initial research completed thus far
- Detailed personas and scenarios
- High-level user experience strategies to be followed throughout the design and development of the website(s)

*While some high-level wireframe sketches are included, they are to be considered preliminary and directional—not final.*

Following approval of this document, conceptual wireframes and creative design comps will be created to document the experience.

# Stakeholder Interviews

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## Stakeholder Interviews

Roundarch interviewed a number of Crowley stakeholders. Topics included:

- Customer characteristics
- Impressions of Crowley
- Current website usage
- Communication externally and internally
- Website “wish list”

<b>Crowley Business Unit</b>	<b>Participants</b>
Corporate Communications	Craig Cox, Jennifer Kimble, Daniel Mock, Mark Miller
Petroleum Services	Dorine Tessier, Elizabeth Carlson
Logistics	Ken Black, Greg Smith
Government Services	Steven Atkinson
Ship Management	Nick Orfanidis, Sharon Timmons, Sharon Baris, Mike Golonka
Accounting Services and Purchasing	Jeronimo Garcia, John Azzo, Linda McKenzie, Hannibal Garces, Jose Santiago, Natalie Thrift
Human Resources	Tricia Pelger, Zoraida Jirau, Margaret Reisner, David Holden, Brian Lee
Liner Services	Tricia Loveless, Rob Clapp, Brad Brown, Laura Kelly
Vessel Management (Marine Technical Consulting)	Jonathan Smith
Customer Service	Lasonya Hill
Titan Salvage	Amit Wahi
Customized Brokers	Nelly Yunta
Ship Assist and Escort Services	Scott Hoggarth, John Geary
SSQE	Stephen Wilson, Pam McElroy
Marine Contract and Energy Support Services	Mike Griglioni
Petroleum Services	Mike Mendenhall, Bob Cox, Craig Tarka, Bill Holland, Bill Hill
Jensen Maritime	Johan Sperling, Camilla Hveding
Shared Services - El Salvador	Azucena Hernandez
Latin America - Panama and Costa Rica	Jorge Campabadal
Latin America - Northern Zone	Claudia Katten
Latin America Logistics - Guatemala	Miguel Artiga

# Customer Interviews

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“Customer” is a broad term that primarily included Crowley’s clients, but also other potential users of the website such as recent hires and business partners.

Topics included:

- Working relationship with Crowley
- Impressions of the company
- Communication habits
- Current website usage—Crowley’s and others
- Website “wish list”

Company Name	Participant	Related Crowley Service / Business Unit
Hanesbrands	Rick Preston	Logistics
Alaska Tanker Company	Bob Wenz	Safety, Security, Quality & Environmental
National Shipping Agencies	Torey Presti	Ship Management
Cruise West	Wilco VanBoheemen	Jensen Maritime Consultants
Ryan Air	Starr van Mersbergen	Crowley Petroleum Distribution
Transmarine Navigation Corp	Lon Cain	Ship Assist and Escort Services
China Shipping	Kevin Carroll	Liner Services
Fruit of the Loom	Oleh Korohey	Liner Services
TJX	Brian Lawson	Liner Services
Heerema Marine Contractors	Albert Wijninckx	Crowley Marine Services - Energy Marine Services
DnB NOR	Nikolai Nachamkin	Banking & Finance
World Shipping Council	Anne Kappel	Industry Association
O’Neale’s Transport	Patrick Neugent	Agent
Gordon, Grant & Co.	Rhett Chee Ping	Agent
Crowley	Daniel Allen	Human Resources (recent hire)
Crowley	Jim O’Leary	Human Resources (recent hire)

# Competitive Analysis

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In order to determine where Crowley stands amongst its industries in terms of web presence, we conducted a competitive analysis of a variety of marine services websites. For this analysis we used the websites of nine companies that compete with Crowley in some area of the marine services industry.

These companies' sites were evaluated using the following parameters:

- Home Page
- Navigation
- Search
- Content: Corporate Information
- Content: Services Offered
- Organization of Services
- Press, Publications and Social Media
- Career Information
- Contact Information

The scoring of the sites were based upon a scale of 1-5, where 1 was an unusable or lacking feature and 5 was industry leading and engaging feature.

From the competitive analysis, we found that most websites within the marine services industry lack richness in their design. These sites incorporate minimal interactivity and use of multimedia. Amongst the industry, larger organizations like Foss and OSG seemed to have better websites. Most sites also seemed to lack search capabilities.

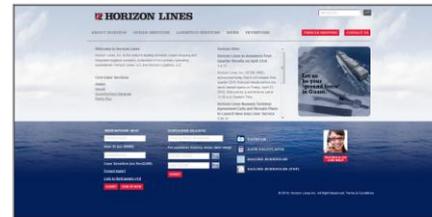
Recommendations for Crowley included having a uniform layout across subsidiaries, laying out services across a variety of axes, and improving the look & feel of the site. The raw scores for each of the websites can be found below. For a more detailed breakdown of this analysis, please review the *Crowley.com Competitive Analysis* presentation.



OSG



Svitzer



Horizon Lines



AHL



Seaboard Marine



Foss



Damco



APL Logistics



Robert Allan

## Competitive Analysis (Cont.)

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### Scoring Summary

	OSG	Svitzer	Horizon Lines	AHL	Seaboard Marine	Foss	Damco	APL Logistics	Robert Allan	Crowley
Home Page	4	3	3	1	4	3	3	3	3	3
Navigation and Organization	4	3	3	2	3	3	4	3	3	3
Search	1	1	3	1	1	1	1	3	1	3
Content: Corporate	4	3	3	2	3	4	4	3	3	3
Content: Services	3	3	3	2	3	3	4	3	3	4
Organization of Services	3	3	3	2	3	4	4	3	3	2
Press and Social Media	3	2	3	2	2	4	3	4	3	3
Career Information	3	3	1	3	3	3	3	3	3	2
Contact Information	3	3	4	2	3	4	3	3	4	2
Look and Feel	4	3	3	1	3	3	3	3	3	3
<b>Average Score</b>	<b>3.2</b>	<b>2.7</b>	<b>3</b>	<b>1.8</b>	<b>2.8</b>	<b>3.2</b>	<b>3.2</b>	<b>3.1</b>	<b>2.9</b>	<b>2.8</b>

## B2B Sales Funnel - Initial

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The B2B Sales Funnel models the process of—and typical stages within—B2B sales. Unlike B2C sales, B2B sales are often characterized by collective decisions made by groups of people, as opposed to individuals. Moreover, a B2B sale rarely has an eCommerce component at its heart. Rather, B2B sales themselves are much more likely to occur offline.

The following model documents typical stages of the B2B sales decision making process. At the end of this document, we will revisit the funnel to identify Web features and functions that could support each stage in that process.

*In the B2B-focused scenarios that follow in this document, the relevant stages of the funnel are indicated in the orange band.*

Sales Process →

	1. Find	2. Appraise	3. Contact and Engage	4. Decide	5. Offline Sale	6. Post-Sale Service
<b>Focus</b>	Identification of potential suppliers	Qualification of identified suppliers	Evaluation of credibility and beginning a relationship	Assessment of best option among range of options	Value and efficiency	Ongoing communication and self service
<b>Aim</b>	<ul style="list-style-type: none"> <li>Locate potential suppliers</li> <li>Determine competitive landscape</li> <li>Rule out poor matches</li> </ul>	Evaluate services for appropriateness for project	<ul style="list-style-type: none"> <li>Talk to a “real person” to establish a relationship and gather details</li> <li>Appraise initial level of service</li> <li>Consultation on best strategy</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate Crowley in context of other vendors (or in context of doing nothing)</li> <li>Reach informed decision</li> </ul>	<ul style="list-style-type: none"> <li>Obtain best value for money</li> <li>Faith in integrity of delivery promise</li> <li>Establish details or working relationship</li> </ul>	<ul style="list-style-type: none"> <li>Understand project status at all times</li> <li>Maintain communication channels</li> <li>Easily adjust details</li> </ul>
<b>Need</b>	<ul style="list-style-type: none"> <li>Findability, e.g., personal referral or Web search engine</li> <li>High-level information about services, i.e., “Do they do this?”</li> </ul>	<ul style="list-style-type: none"> <li>Detailed capabilities</li> <li>Demonstration of experience</li> <li>Equipment specifications</li> <li>High-level pricing information</li> <li>Industry-specific information</li> </ul>	<ul style="list-style-type: none"> <li>Accurate contact information and quick response</li> <li>Tailored information on services</li> <li>Pricing</li> <li>Availability</li> <li>Personal connection</li> </ul>	<ul style="list-style-type: none"> <li>Safety information</li> <li>Objective endorsements</li> <li>Answers to follow-up questions or concerns</li> </ul>	<ul style="list-style-type: none"> <li>Legal agreements</li> <li>Financial arrangements</li> <li>Scheduling</li> </ul>	<ul style="list-style-type: none"> <li>Access to personnel 24/7</li> <li>On-demand status updates</li> <li>Easy account / billing access</li> <li>Self-service ordering</li> <li>Information on complementary services</li> </ul>

# Personas

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## What is a persona?

A persona is a *narrative user profile* that serves to embody a collection of particular behaviors and attributes. The persona provides an aggregate identity that, along with other members of a persona set, can serve to represent the key needs and behaviors of an entire audience.

The personas are based primarily on the stakeholder and customer interviews conducted during the first three weeks of this project.

## Why are personas useful?

In the Web design process, the loudest voices tend to get the greatest amount of attention. This may drive a tendency to prioritize and design for edge case needs that may not be representative of “true” customer needs. At the same time, it is difficult to focus on and design for a large and diverse audience, and the individual tends to get lost within a sea of varied users.

The persona process aggregates an array of characteristics to evolve composite users, mitigating the potential for bias and allowing us to see, understand, and solve for actual client needs. At the same time personas consolidate a myriad array of potential users into a handful of representative personalities, allowing us to focus on and design for individuals.

## When do we employ personas?

Personas are useful at all times since, given their representative nature, they can serve to remind the business of its target audience. However, personas are most directly useful in the early requirements and design phases of projects where they can directly inform the creation and development of a product or service.

## How do we use personas?

The primary purpose of personas is as a *design tool* to ensure better understanding of user needs and behaviors by the business. The best way to do this is to absorb them, and then consider them when making tactical decisions regarding services that affect them. Instead of “We know our users want x,” consider “Persona A clearly has this need, and here’s how we can solve for that.”

# Scenarios

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## What is a scenario?

A scenario is a sequential description of how a persona accomplishes a task. It describes the user's interactions with the website, as well as internal workflow processes. The scenarios described here are *aspirational*, in that they describe a vision of how the website may function in the future—not how it works now.

## Important Notes

- The personas and scenarios in this document are not intended to represent all—or even most—of Crowley's current business units. Rather, they are meant to document the *key types of interactions* that the user base is likely to exhibit on the site.

## Why do we use scenarios?

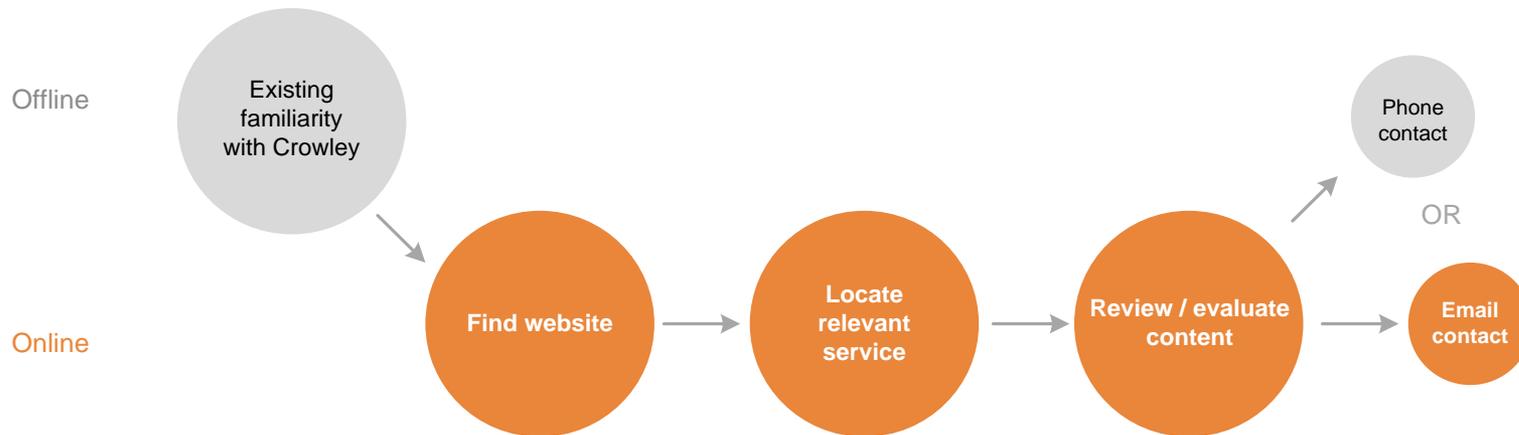
Scenarios expand the personas by outlining key tasks each persona may complete on a day-to-day basis. Like personas, scenarios are used as an input into design of the system—helping to ensure that the site supports completion of the user tasks outlined in the scenarios.

- These scenarios reference functionality and systems that may be *outside of the scope* of Roundarch's current engagement with Crowley. They are included to represent an ideal future state of the website(s).

## Core Website Interaction

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The interviews and other research described above suggest that the majority of Crowley's Web users follow the same basic interaction pattern. It can be summarized as follows:



For many users, the journey is simple: find the relevant service description, learn enough to decide it's worth pursuing, and contact Crowley to continue the engagement process. There isn't much "functionality" involved—the prospect needs just the right amount of information to move forward. From there, it's a very consultative sell by Crowley and the transaction has moved entirely off-line.

Accordingly, many of the scenarios below include this basic interaction.

The team needs to be vigilant about not losing sight of this *core interaction pattern*—making sure to optimize each step of the online experience illustrated above.

## Secondary Website Interaction

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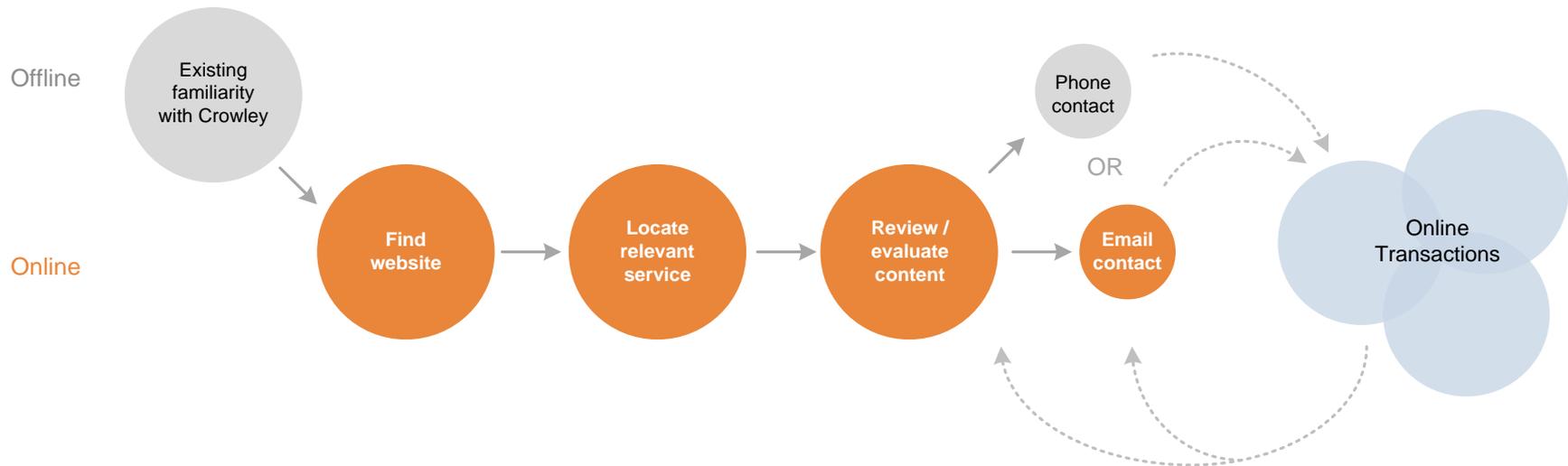
In addition to this core website interaction, a smaller—but very important—population of Crowley.com users will return to the site repeatedly for more robust functionality.

Within Liner Services and a handful of other service lines, customers will use the site as a launching pad into extranet functionality on a day-to-day basis.

Current and future features included in this interaction pattern include:

- Shipping order placement
- Shipment track and trace
- Account and billing inquiries
- Project collaboration, e.g., file sharing and commenting
- Fuel ordering and account management

Therefore, some scenarios also focus on these other types of interactions that suggest a richer Web experience.



# Summary of Personas

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Name	Role	Crowley Service(s)
 <b>Tom Leonard</b>	VP of Transportation, Large Apparel Retailer	Liner Services, Logistics
 <b>Chris Hart</b>	Owner, Small Shipping Company	Salvage and Emergency Response (Titan)
 <b>Tony Lee</b>	Contract Manager, Prime Contractor	Government Services
 <b>Ellen Long</b>	Job Applicant	Human Resources, Intranet
 <b>Jack Yates</b>	Consumer / Small Business Owner	Alaska Fuel Distribution Freight Services (Vehicle Transport)
 <b>Steve Nance</b>	Small Business Owner, Marine Provisions	Supplier / Vendor Services
 <b>Will Ortiz</b>	Logistics Sales Associate, Crowley	Content Management System (CMS) Customer Relationship Management (CRM)
 <b>Patti Carson</b>	Journalist, Consumer Publication	Corporate Communications / Media

# Tom Leonard: Persona

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## Tom Leonard

VP of Transportation,  
Large Apparel Retailer

### Day-to-Day

As a VP of Shipping for a large American retailer, Tom is responsible for all of the company's shipments to and from Central America, where their apparel is fabricated. He oversees the movement of approximately 2500 containers per year.

### Current Situation

Tom's company is interested in finding a new carrier to handle their Central America transportation needs. While they haven't worked with Crowley in the past, Tom "always knew about Crowley" throughout his 25+ year career in the marine industry—and considers them to be a reputable company.

### Goals

- Peace of mind about the safety and timeliness of his shipments
- Easy booking and accounting processes
- Full visibility into all of his shipments at every stage of transport
- Seamless integration between ocean and on-shore transportation

### Frustrations

- Delays due to weather or mechanical difficulties
- Inaccurate or incomplete information about the status of his goods in foreign ports
- Difficulty contacting his carrier during non-business hours
- Unexpected changes in service or pricing

### Needs

- Comprehensive information about carriers' capabilities, including vessel sizes/capacities, routes, and sailing schedules
- Easy-to-find, single login to all of carrier's extranet services
- On-demand access to tracking information without picking up the phone
- "Push" alerts for important announcements or service updates
- 24/7 contact information for urgent issues

"I just need to know where my stuff is."

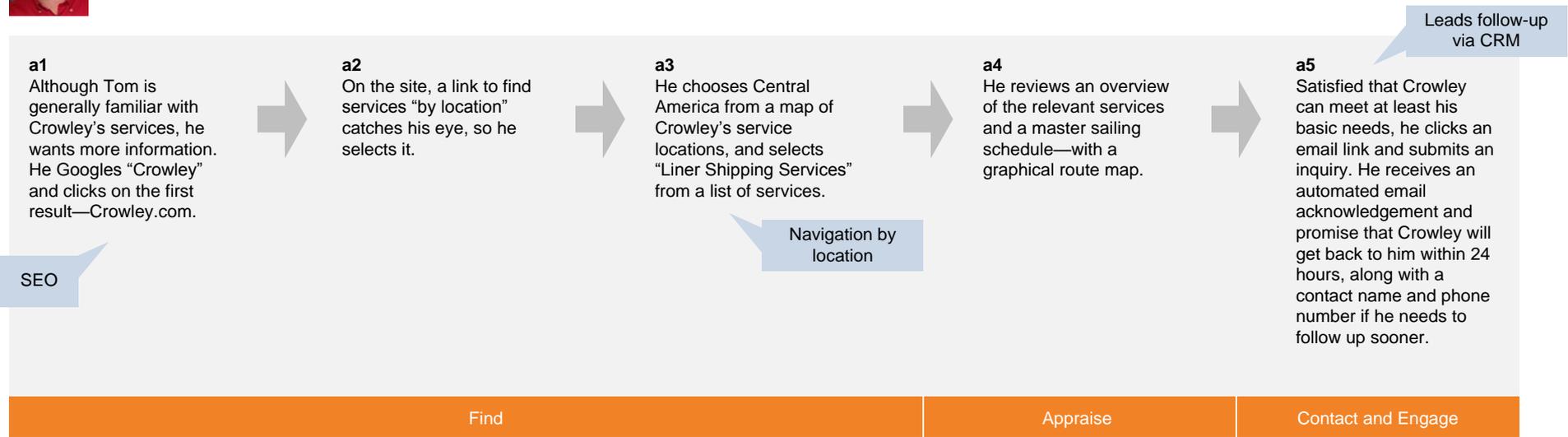
# Tom Leonard: Scenarios A-B

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**Tom Leonard**

Crowley Services: Liner Services, Logistics



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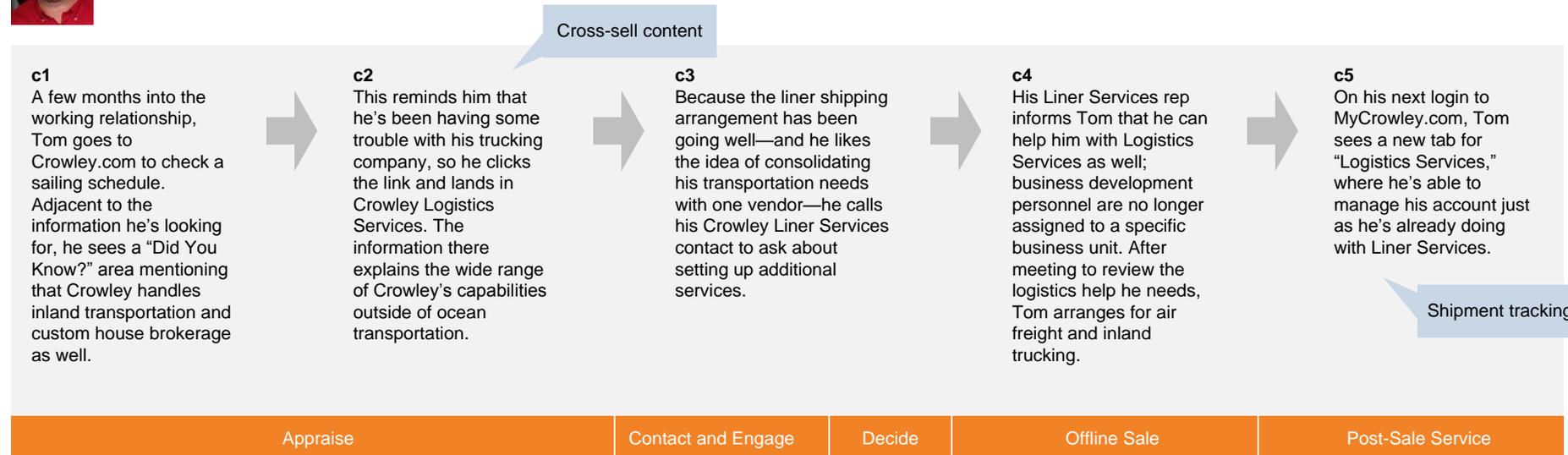
# Tom Leonard: Scenario C

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**Tom Leonard**

Crowley Services: Liner Services, Logistics



## Chris Hart: Persona

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### Chris Hart

Owner, Small  
Shipping  
Company

#### Day-to-Day

Chris owns and operates a shipping company of eight vessels. He is personally involved in all aspects of the operation, from finance to daily operations.

#### Current Situation

While his fleet is relatively small, he takes safety very seriously. To that end, he is reviewing all of his safety and emergency planning documentation. He is beginning the process of finding a partner to assist with these efforts.

#### Goals

- A safe and dependable fleet
- Preparedness. He hopes to never have an emergency, but wants to be ready just in case
- The confidence of both his investors and his employees

#### Frustrations

- Unaware of the best process for emergency response planning
- Difficulty reaching some vendors when he has time-sensitive needs
- Employees who feel that nothing negative can ever happen so they don't want to plan for it

#### Needs

- Assistance in developing his emergency response plan
- Real-world training in how to handle a crisis
- Dependable 24-hour access to all emergency response partners

“I hope I never have an emergency on my ship, but I need to be prepared just in case.”

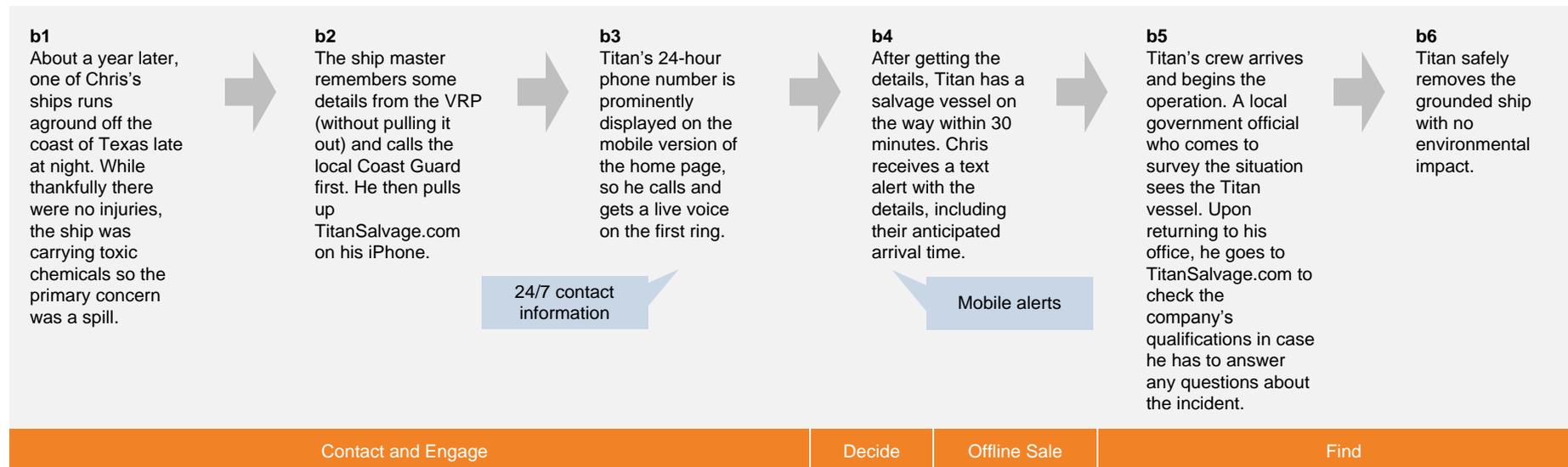
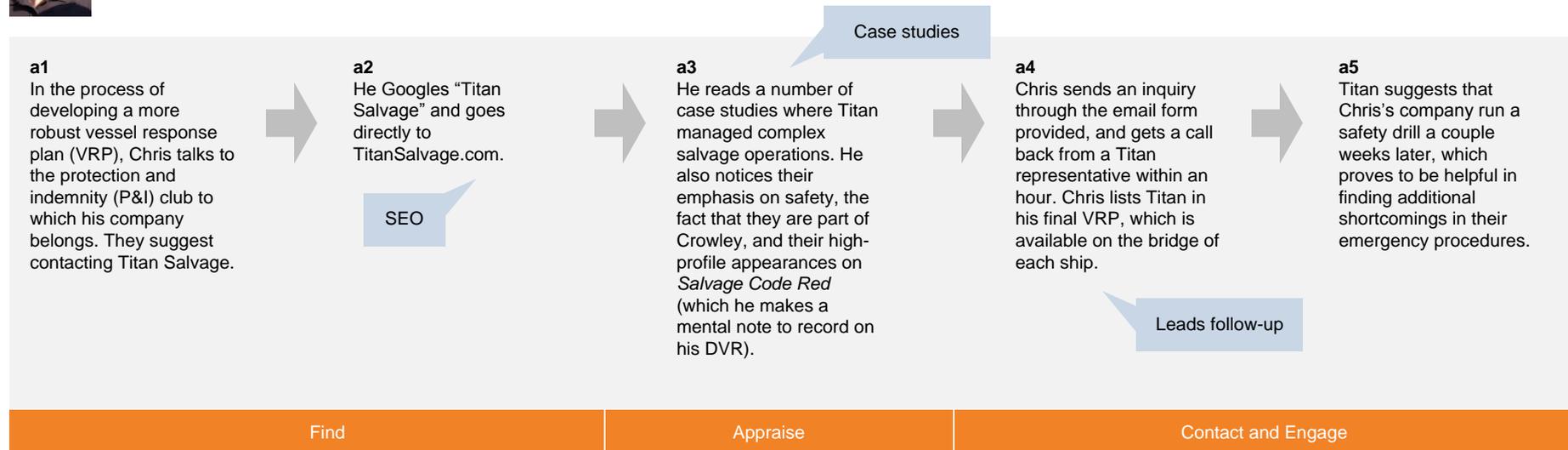
# Chris Hart: Scenarios A-B

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**Chris Hart**

Crowley Services: Salvage and Emergency Response (Titan)



(Continues below)

# Tony Lee: Persona

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## Tony Lee

Contract Manager, Prime Contractor

### Day-to-Day

Tony is a Contract Manager within a major prime contractor, engaged with the US Maritime Administration (MARAD). He is tasked with monitoring and responding to safety issues on a number of commercial vessels that contract with MARAD, and fairly new to the job. One of his long-term goals is to establish relationships with dependable suppliers for the many contract needs that arise.

### Current Situation

One of the ships under Tony's responsibility has experienced a major mechanical failure at sea. His most pressing need is towing the vessel. However, this incident is only the latest in a long line of issues with this ship. He feels that he may need to address underlying personnel and maintenance problems.

### Goals

- Continued successful relationship—and more business—with the US government
- A roster of established, dependable, US-based vendors with proven track records
- One-stop consulting on complex marine program management initiatives

### Frustrations

- Intense scrutiny of his decisions by the government agency's Contract Officer
- Working with less experienced, higher risk vendors
- Suppliers who use their own internal jargon, rather than the US government's established terminology

### Needs

- Dedicated government-focused content and that comprehensively addresses his needs
- A single point person to manage the disparate aspects of any project
- A documented history of successful government projects
- Vendors who "speak the same language" to ensure that his needs are understood

"I want a partner with proven government experience over a wide range of projects."

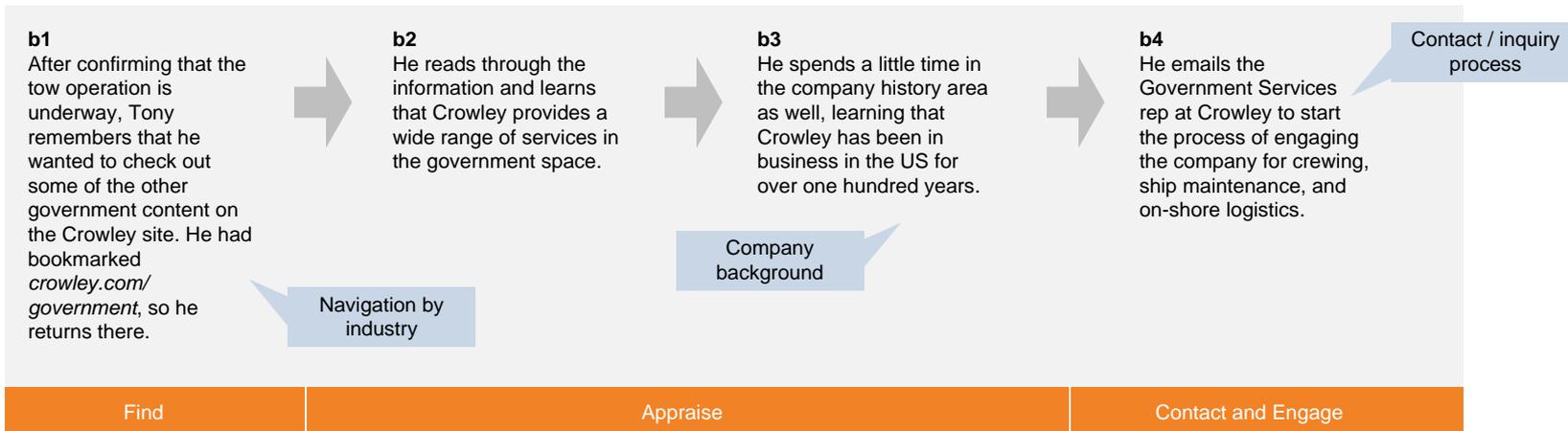
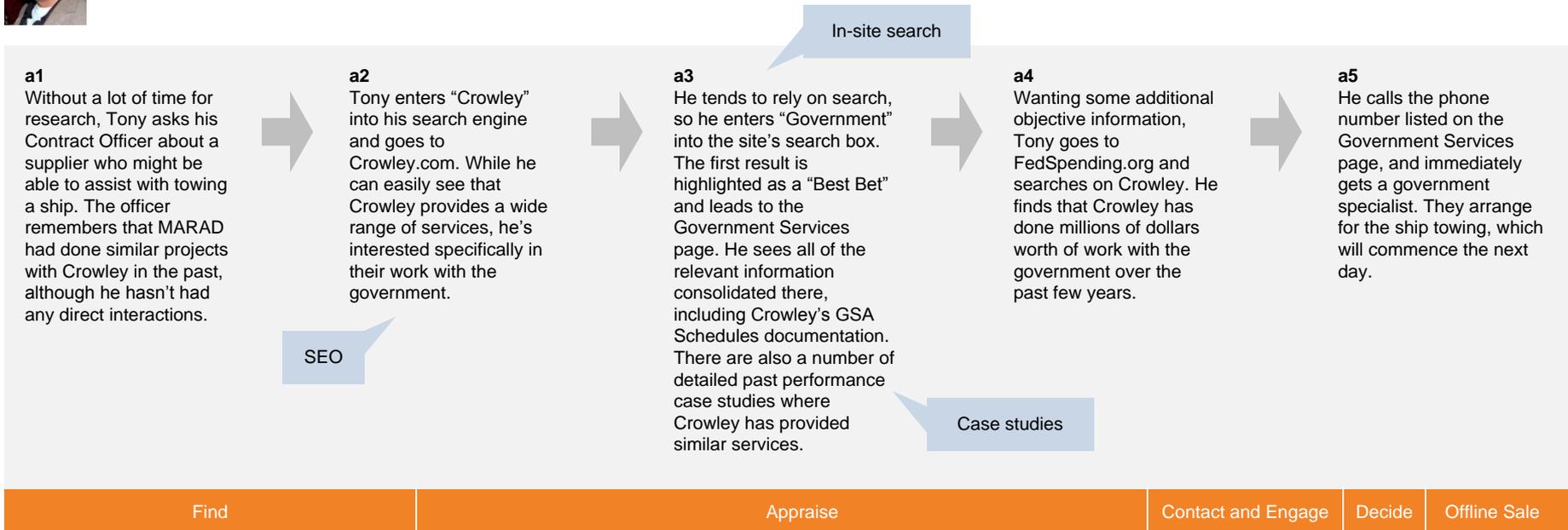
# Tony Lee: Scenarios A-B

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**Tony Lee**

Crowley Service: Government Services



(Continues below)

# Ellen Long: Persona

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**Ellen Long**

Job Applicant

### Day-to-Day

Until recently, Ellen worked as an Assistant Port Engineer with a Liner Services company in Los Angeles. She had been working with them for four years, ever since she was recruited on campus at the California State University where she received her B.S. in Marine Engineering. Her old job involved assisting the Senior Port Engineers in managing repairs, maintenance and record-keeping.

### Current Situation

Her company went through a financial crisis and had to sell a number of their vessels. As a result, several engineers including Ellen lost their jobs. She is now looking for a job in the Seattle area where her parents live. She has uploaded her resume to multiple job portals including Monster.com and Seattle Jobs.

### Goals

- Quickly find a new job that leverages her past experience and also provides competitive pay
- Work for a reputable organization that offers her a stable career and allows her to achieve her long-term career goals
- Permanently settle down in the Seattle area near her family

### Frustrations

- Too many job portals on the Web, all with their own registration and application processes, which are time-consuming and complicated
- Company websites lacking sufficient career information, making it difficult for her to find jobs that suit her profile.
- Inability to get a feel for an organization before interviews due to their limited and outdated websites
- The feeling that the “jobs” email addresses provided on company websites are “black holes” because often there is no confirmation of receipt on resume submission

### Needs

- An easy way to pinpoint jobs that suit her education and experience
- Career websites that provide detailed information not just about the specific job but also about the organization, their culture, and their standing in the community
- A means to talk to an insider within the organization both during the application/interview process as well as while making the decision to accept an offer

“The company culture is just as important as the job responsibilities.”

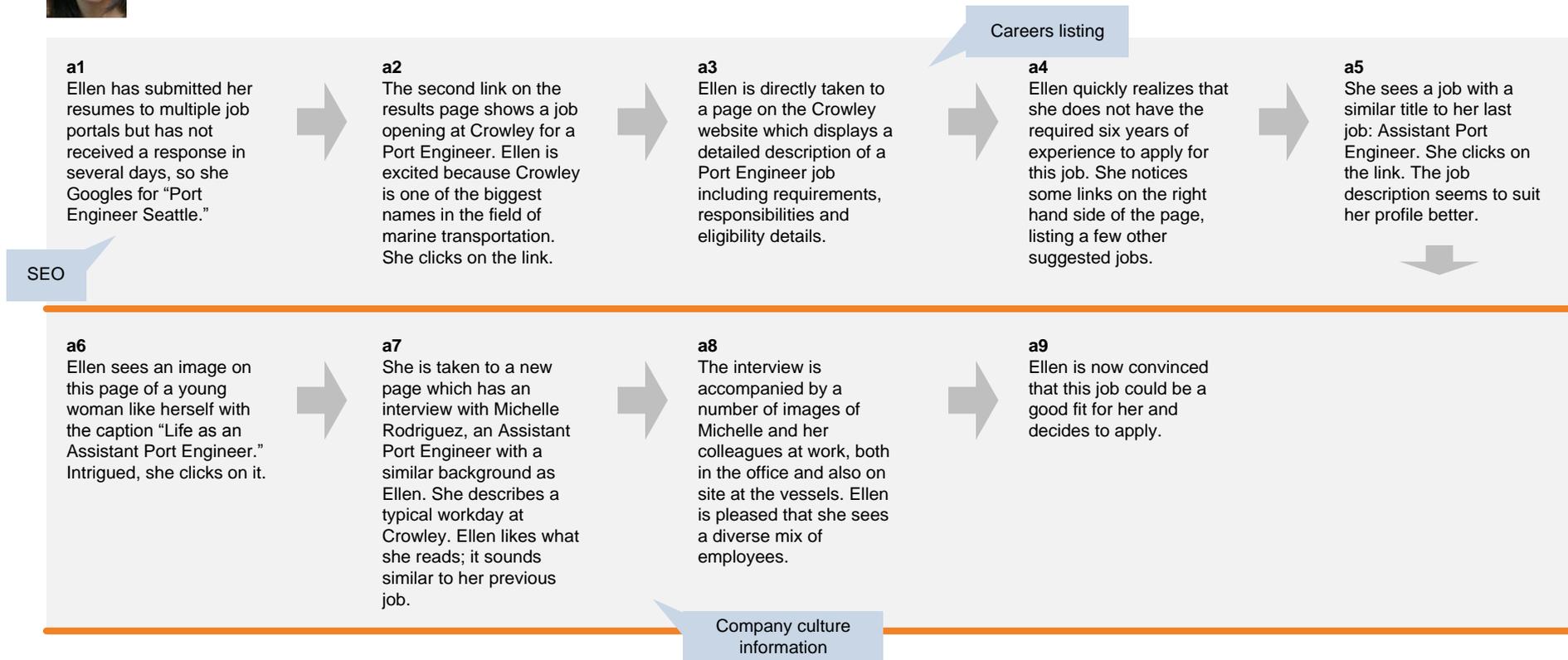
# Ellen Long: Scenario A

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**Ellen Long**

Crowley Services: Human Resources, Intranet



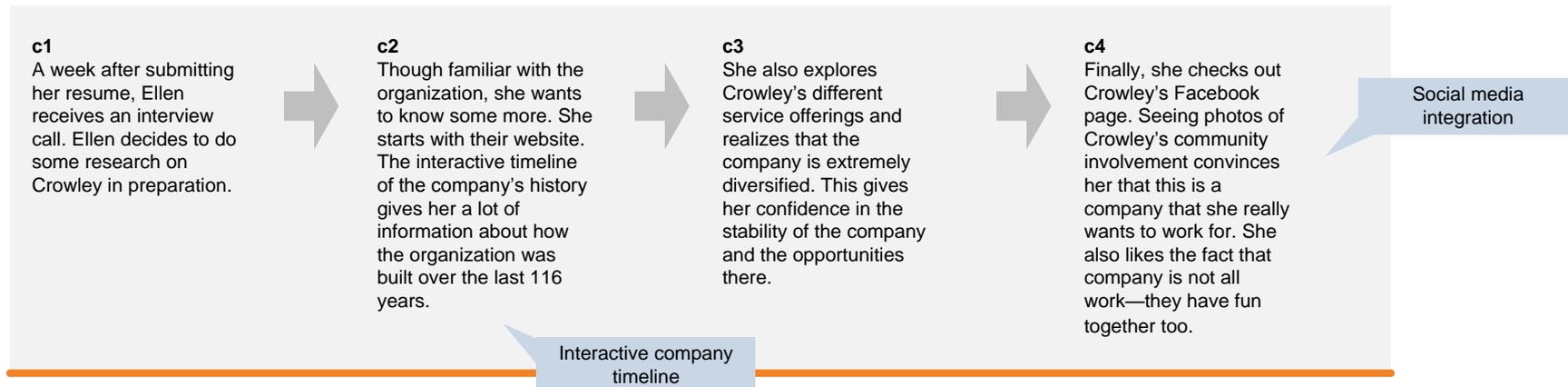
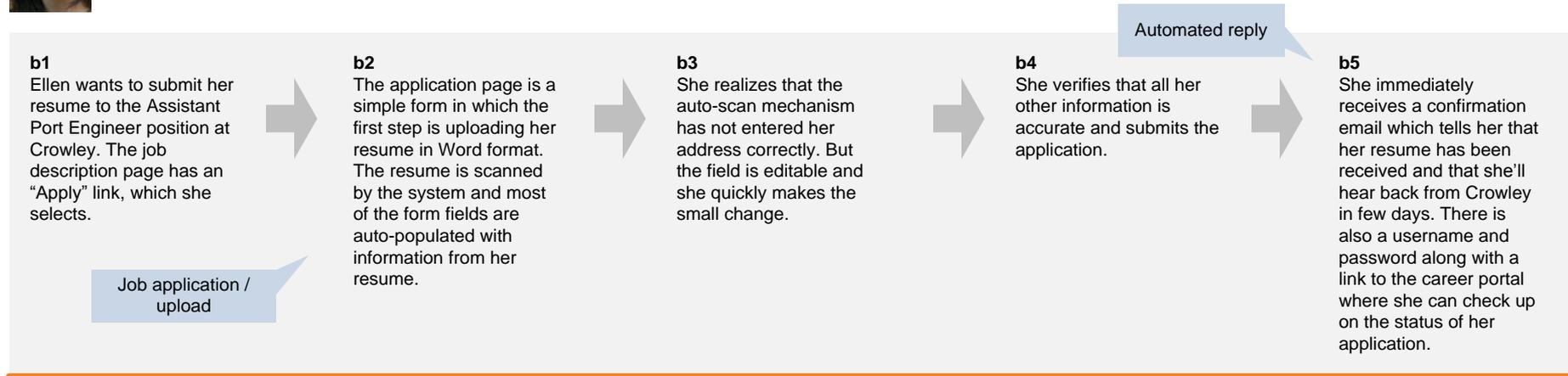
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## Ellen Long: Scenarios B-C



**Ellen Long**

Crowley Services: Human Resources, Intranet



(Continues below)

# Ellen Long: Scenario D

Project: <b>Crowley Website Redesign</b>	Date / Version: <b>May 24, 2010 1.03</b>	<b>ROUNDARCH +</b> <b>CROWLEY</b>
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**Ellen Long**

Crowley Services: Human Resources, Intranet

**d1**

Ellen has been hired as an Assistant Port Manager at Crowley's Seattle offices. On her first day at work she is assigned a computer and is given an orientation of the Crowley intranet.



**d2**

Ellen has another orientation in the afternoon and a conference room has been assigned on her calendar. She does not know where this room is located, so she uses the interactive office building map available on the intranet to locate the room.



**d3**

Ellen wonders if any of her classmates from California State University are currently working for Crowley. She searches the employee directory to look for California State University and is happy to see a number of employees with the university listed on their profile. She emails the few familiar names she sees to say hello.



**d4**

Ellen is assigned her first project at Crowley. She receives access to the project page on SharePoint. She reads all the documents on this page to get familiar with the project. She can also view the team composition and access profiles of her team members through this page

Enhanced intranet functionality

# Jack Yates: Persona

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## Jack Yates

Consumer and Small Business Owner

### Day to Day

Jack Yates is owner of Yates Freight Services. He owns three small cargo planes and runs his business out of Aniak, Alaska with a staff of three pilots and his wife, Catherine.

### Current Situation

An important part of Jack's business is maintaining the fuel supply for his cargo planes. Crowley delivers this fuel a couple of times a year by barge when the Kushkokwim river thaws in the summer. They also deliver the heating fuel for Jack's home.

He has one daughter, Anne, who is a student of marine biology at the University of New Jersey. She recently informed him that she is moving to Costa Rica for a year to do research.

### Goals

- Ensure a smooth refueling process every time one of his cargo planes land in Aniak
- Make sure that the yearly refilling of the fuel reservoirs goes without a glitch when the Crowley barges arrive in the summer
- Help Catherine run their home smoothly
- Keep in touch with his daughter and be a supportive parent even though they live so far away

### Frustrations

- Aniak does not have any road connections to other cities, so airplanes are the only means of year-round deliveries to and from with outside world
- Summers are short and the Kushkokwim River thaws only for a few short months between June and October-- the only time when barges can travel down the river to satisfy the town's freight and fuel needs

### Needs

- Be prepared when Crowley makes their fuel delivery and make sure that the required amount of fuel is stored up especially before Winter, when transportation along the river becomes impossible
- Tracking of the arrival of fuel barges for both work as well as home needs
- Ability to communicate with the Crowley folks, since their barges are the lifeline for his home and business
- Dependable and fast internet service, since Aniak is a small place and connections to the outside world are limited
- Accurate price information

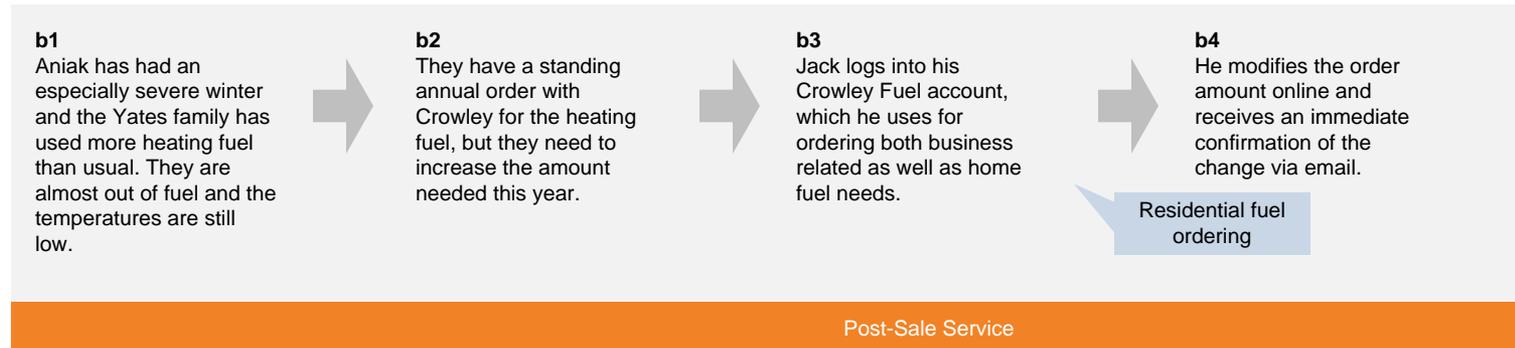
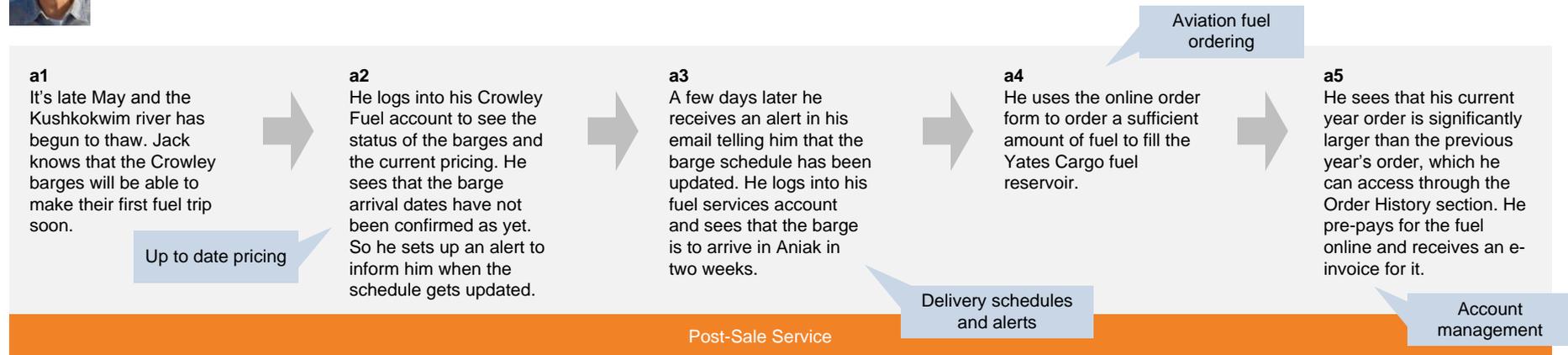
“In Alaska, fuel is our lifeline.”

## Jack Yates: Scenarios A-B



**Jack Yates**

Crowley Services: Alaska Fuel Distribution, Freight Services (Vehicle Transport)



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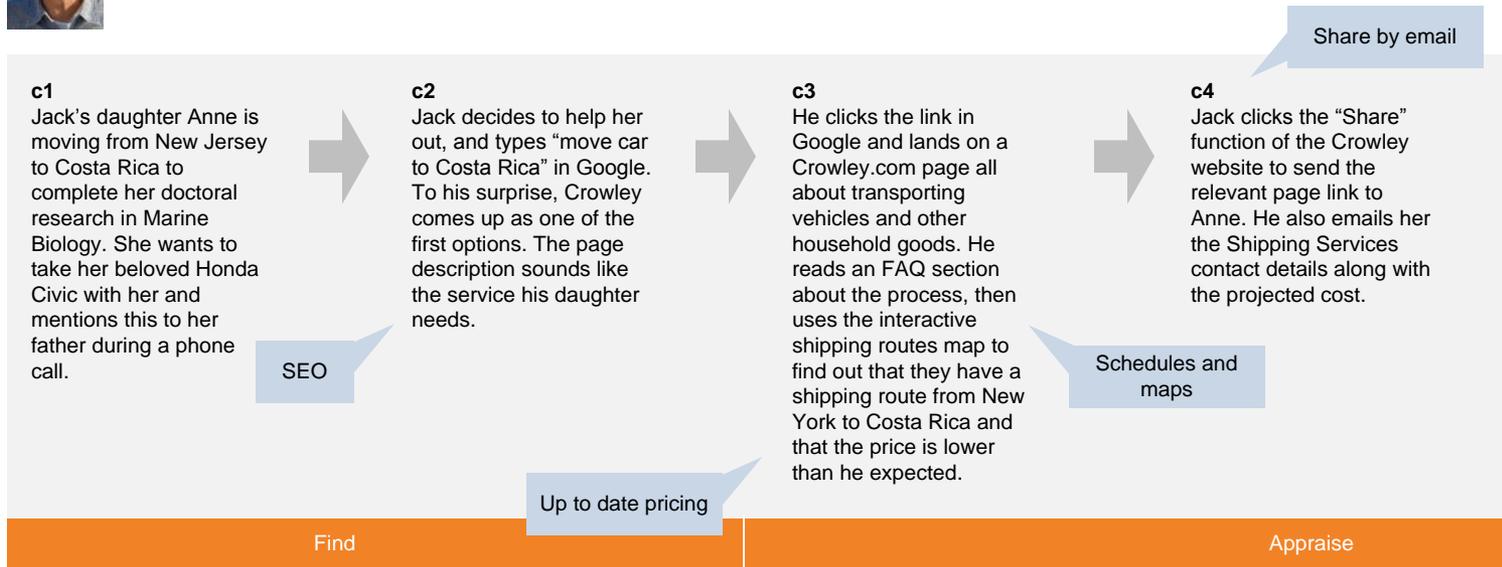
# Jack Yates: Scenario C

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**Jack Yates**

Crowley Services: Alaska Fuel Distribution, Freight Services (Vehicle Transport)



# Steve Nance: Persona

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## Steve Nance

Small Business  
Owner, Marine  
Provisions

### Day-to-Day

Steve owns a small company in Ft. Lauderdale, Florida. He and his crew supply provisions (food, beverages and supplies) for ships in Port Everglades. His primary responsibilities are business development and ensuring good customer service.

### Current Situation

Steve's company has primarily worked with smaller clients with only one or two ships. While they're managing to pay the bills, the one-off nature of the projects seems unpredictable, inefficient, and requires a lot of coordination. To that end, he would like to establish working relationships with larger companies for whom he can provide more long-term, consistent services.

Steve is well aware of Crowley. He sees their vessels all over the port, and knows them to be a reputable company—one he'd like to work with.

### Goals

- Grow his business
- Find new clients—particularly larger ones—within a fairly small universe of potential companies
- Keep the cash flow moving efficiently
- Keep his clients happy

### Frustrations

- Difficulty getting on the vendor consideration “list” with larger companies
- The unpredictable nature of his current business—clients call when they need him with little notice
- Slow payment and lack of visibility into clients' accounts payable process

### Needs

- A way to make his services known to potential clients without an inside connection
- Readily available updates on clients' ongoing supplier needs
- Easy invoice submission and status checking

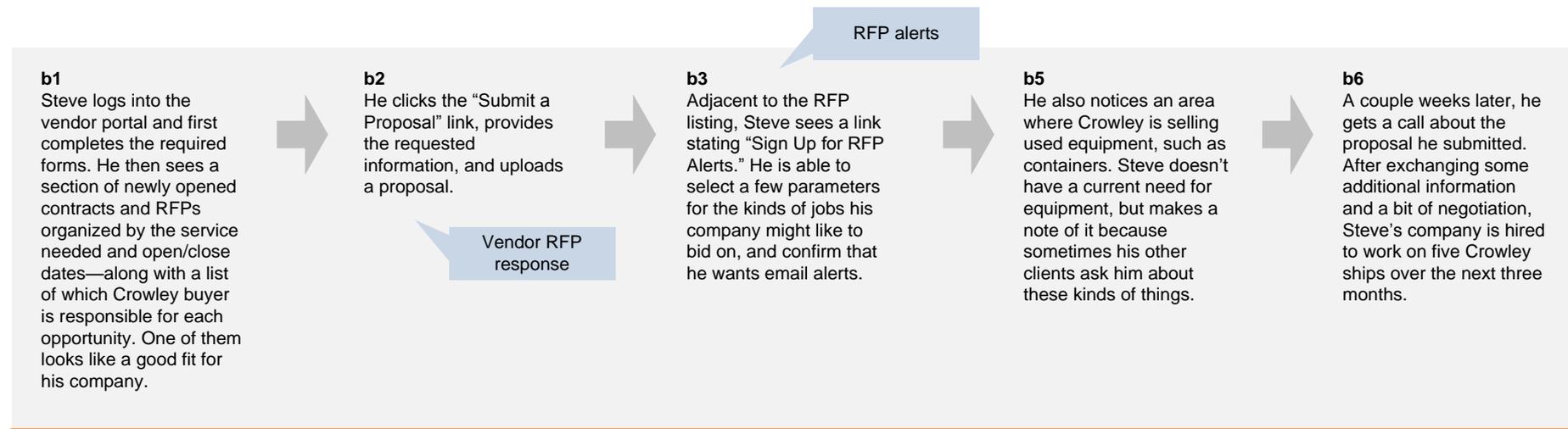
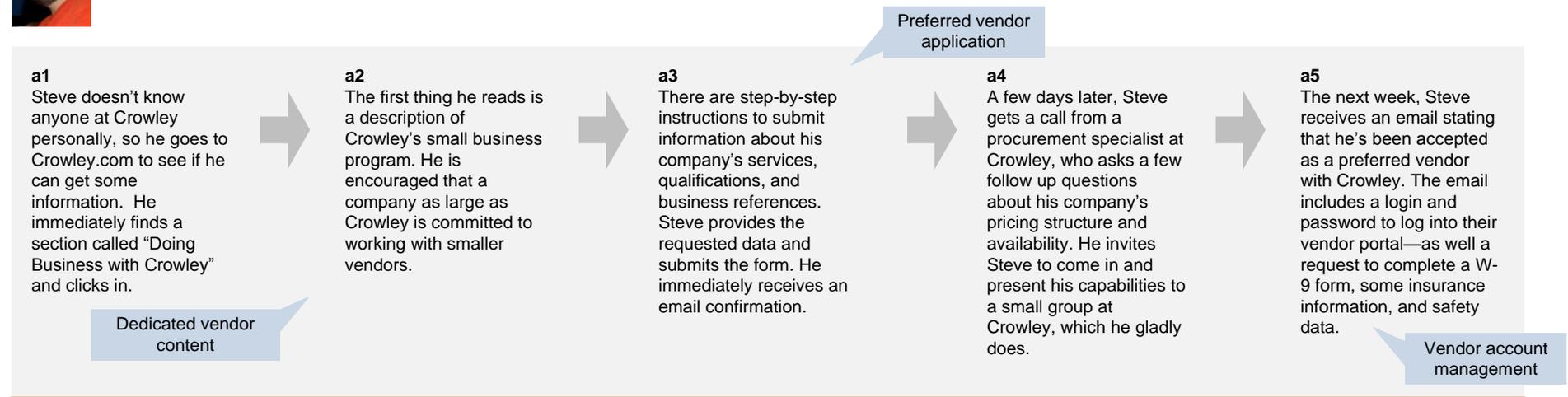
“I’m ready to work with the big guys, but they don’t know I exist.”

## Steve Nance: Scenarios A-B



**Steve Nance**

Crowley Service: Supplier / Vendor Services



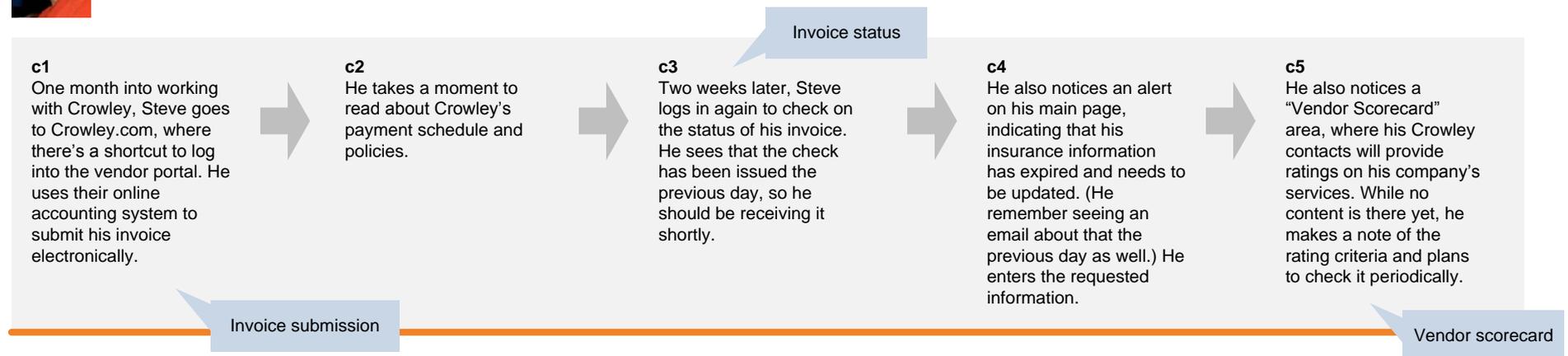
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## Steve Nance: Scenario C



**Steve Nance**

Crowley Service: Supplier / Vendor Services



# Will Ortiz: Persona

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## Will Ortiz

Logistics Sales Associate, Crowley

### Day-to-Day

Will is an Associate Sales Manager within the Logistics business unit at Crowley. He holds a Bachelor's degree in Sales & Marketing and has been working for Crowley for the last four years. His responsibilities include interacting with potential clients on the phone, managing the sales pipeline within the CRM and handling the day to day updates to the Logistics section of Crowley's public facing website.

### Current Situation

Will was recently given the responsibility of managing Logistics-related content on Crowley's public facing website. He uses the content management system (CMS) to make any updates requested by the senior managers within Logistics.

### Goals

- Provide excellent customer service for Logistics-related inquiries received by Crowley
- Ensure that the Logistics-related information on the public facing Crowley website is accurate and up-to date at all times
- Successfully shoulder all the responsibilities assigned to him so that he can move to the next level professionally—and still have a life outside of work

### Frustrations

- Updating the Crowley website is a complicated process requiring permissions from multiple people
- It often takes several days for any content to be updated on the Crowley site
- The sales records in the CRM systems are often not complete and/or updated
- Logistics inquiry calls are often misdirected which leads to loss of business

### Needs

- Ability to directly make small changes to the website within the Logistics section in a timely manner
- Have all Logistics inquiries routed to him since he is the point person to answer these
- Ensure that any material that requires authorization before being posted on the website reaches the concerned personnel so that they can authorize it quickly

“Need help with Logistics? I’m the guy you should to talk to.”

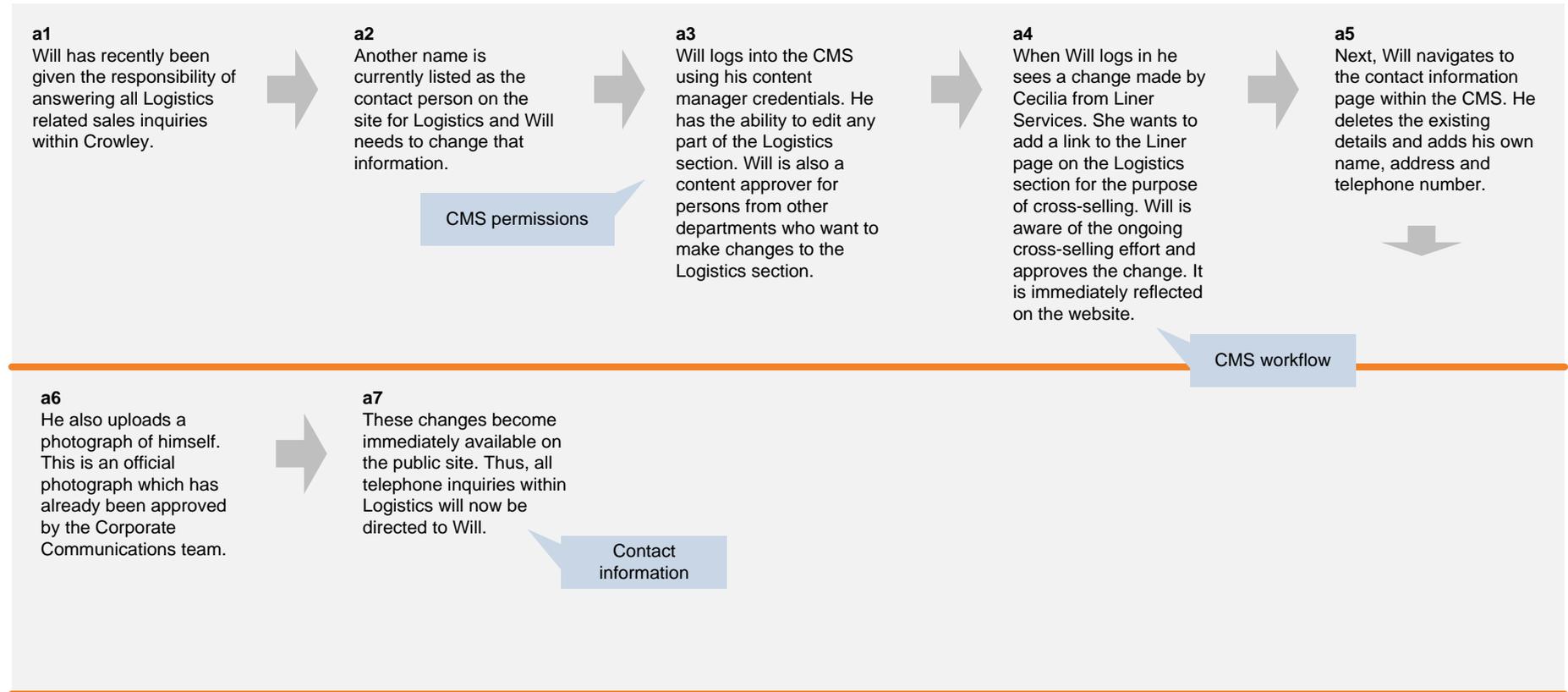
# Will Ortiz: Scenario A

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**Will Ortiz**

Crowley Services: Content Management System (CMS), Customer Relationship Management (CRM)



(Continues below)

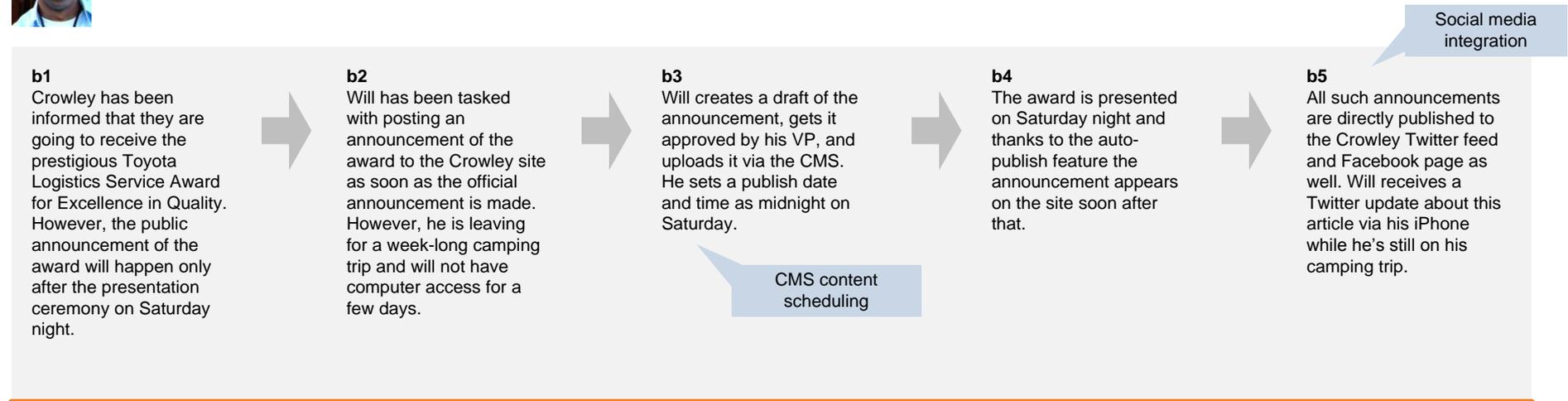
## Will Ortiz: Scenario B

Project: <b>Crowley Website Redesign</b>	Date / Version: <b>May 24, 2010 1.03</b>	<b>ROUNDARCH + CROWLEY</b>
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**Will Ortiz**

Crowley Services: Content Management System (CMS), Customer Relationship Management (CRM)



(Continues below)

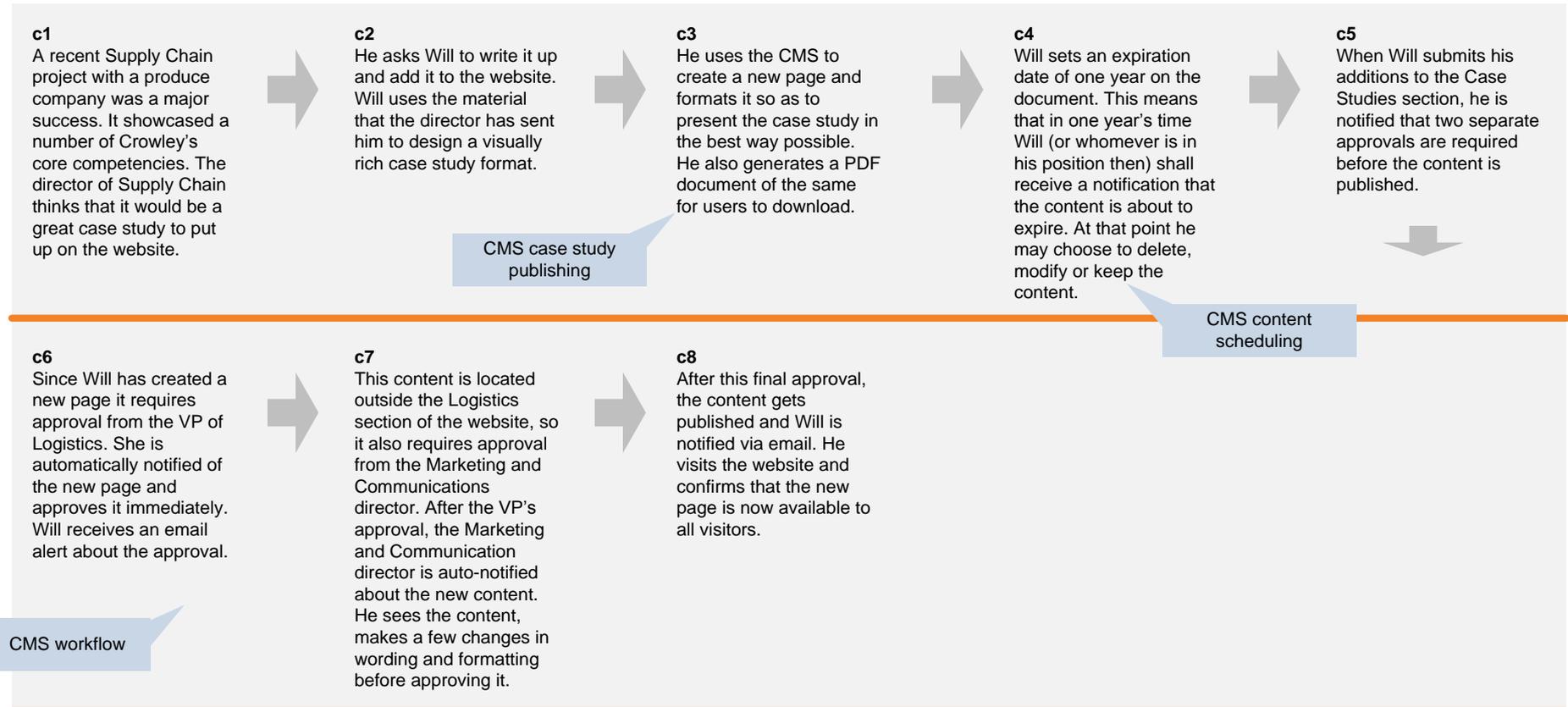
## Will Ortiz: Scenario C

Project: <b>Crowley Website Redesign</b>	Date / Version: <b>May 24, 2010 1.03</b>	<b>ROUNDARCH +</b> <b>CROWLEY</b>
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**Will Ortiz**

Crowley Services: Content Management System (CMS), Customer Relationship Management (CRM)



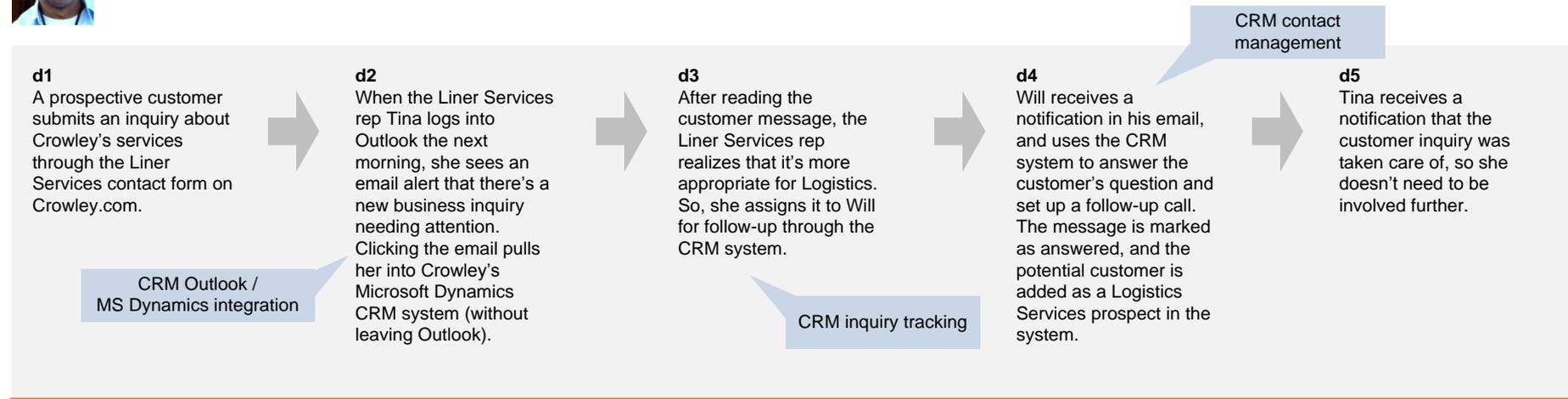
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## Will Ortiz: Scenario D



**Will Ortiz**

Crowley Services: Content Management System (CMS), Customer Relationship Management (CRM)



# Patti Carson: Persona

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## Patti Carson

Journalist,  
Consumer  
Publication

### Day-to-Day

Patti is a writer for a news and lifestyle magazine in South Florida. Due to the great number of immigrants in the area, she tends to focus heavily on issues affecting that population.

### Current Situation

Patti has been tasked with writing an article about American companies' contributions to relief and rebuilding efforts underway in Haiti, related to the recent major earthquake. Because she is unable to travel to Haiti, she is relying primarily on U.S.-based contacts and Web research as sources for her article.

### Goals

- Timely writing that tells the stories of real people
- Reaching as wide an audience as possible
- Strong visual content to support her words

### Frustrations

- She's always on a deadline, but resources are not available on nights and weekends
- Distinguishing between corporate public relations and factual information can be a challenge
- Tracking down appropriate imagery is time consuming

### Needs

- Up-to-date news resources on the Web
- Access to media contacts within companies
- High-resolution imagery from information sources
- Frequent "Push" updates on news that she might find relevant for her work (not just any news)

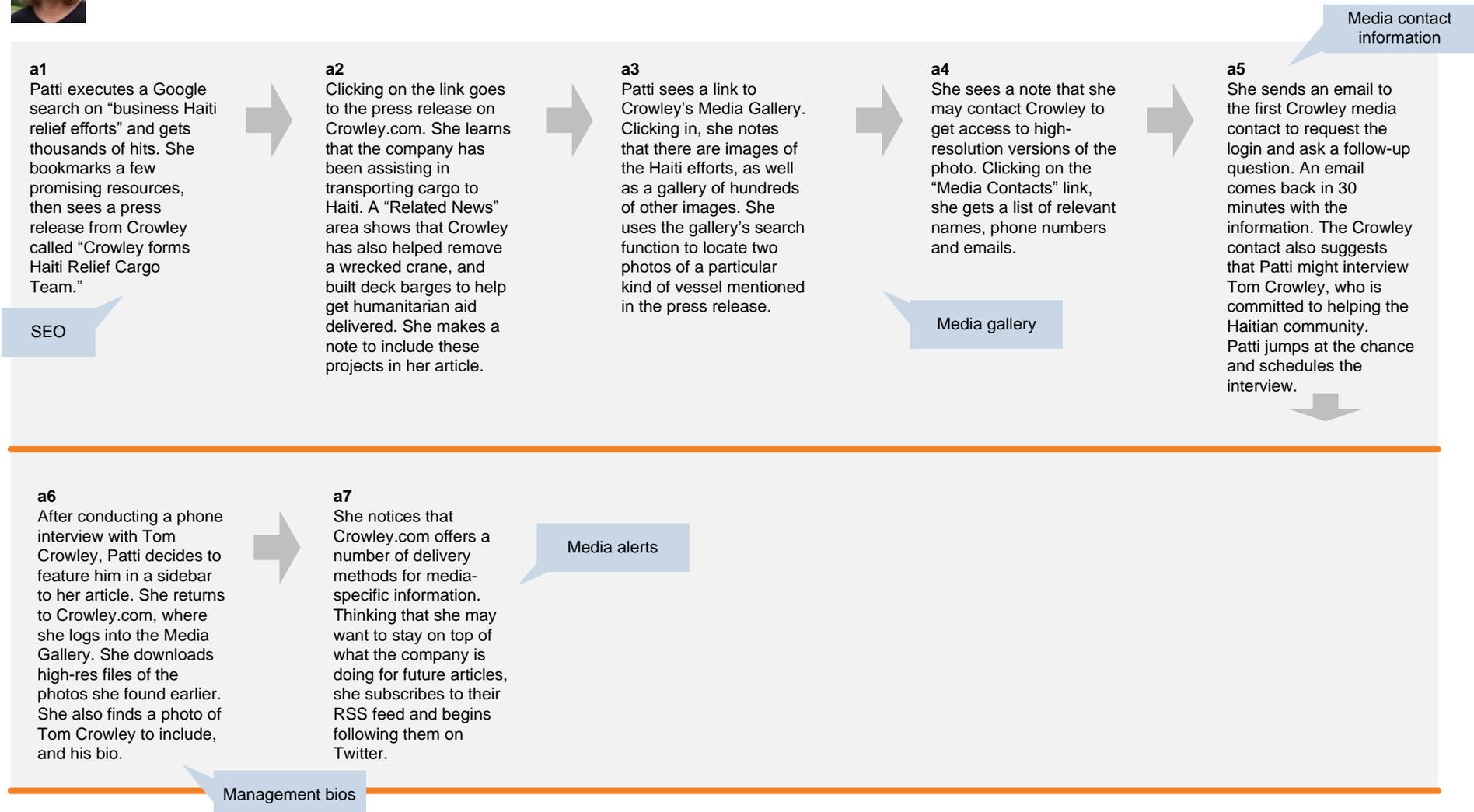
"I'm on a deadline."

## Patti Carson: Scenario A



**Patti Carson**

Crowley Service: Corporate Communications / Media



## Initial Findings and Strategies

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Based on the research described above—as well as user experience best practices—the following high-level observations and recommendations provide a starting point for our design process.

*Please note that this is by no means a comprehensive list of functionality.*

## Company Values

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Throughout the interviews with both stakeholders and customers, it became very clear that Crowley has an outstanding reputation. The company is known for its *stability and durability*, having been a U.S.-based, family business for over 100 years.

Crowley's core value of *safety* also came through loud and clear. Customers feel confident in Crowley's ability to reduce risk in a potentially dangerous industry, even if it comes with a higher price. The commitment to safety starts with Crowley's employees, who clearly are safety's best advocates.

Crowley's stellar reputation should be communicated more fully on the website. While any company can say "we're dependable," Crowley can actually back it up. Including richer materials about the company heritage, e.g., an interactive corporate timeline or perspectives from Tom Crowley can help cement Crowley's steadfastness.

The site would also benefit from more engaging safety-related messaging. While the existing site does include an "Environment and Safety" area, it could be beefed up with specifics on safety statistics and procedures. Extending Crowley's "Safety Moment" to the interactive space has interesting potential too—extending the internal company culture to the public. Finally, safety messaging could be integrated more seamlessly with the specific service offerings, as visitors may not be motivated to find safety information in a separate section.

# Capabilities

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The heart of Crowley’s website (and its subsidiaries’) is the listing of services. Getting the user to the right service is key; if the site needs to do one thing right, this is it. There are a number of challenges that Crowley faces in this respect:

- **Diversification**  
One of Crowley’s strength in its breadth of services. However, it can actually be a hindrance to potential customers who have to wade through a menu of capabilities that are irrelevant to them.
- **Terminology**  
The way Crowley refers to a particular service may not match with the customer’s language. For example, the user might be looking for something called “tugboats” when the actual service is listed as “Ship Assist.” In some cases, Crowley organizes its services by business unit—which is not likely to be meaningful to users.

## Overlap among services

Some of Crowley’s services “blend” into others. For example, a customer who comes looking for Liner Services customer may actually need additional help—matching up better with Logistics. While this overlap makes for great cross-sell and up-sell opportunities, it may also cause confusion in users’ minds.



## Capabilities (Cont.)

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Ensuring that Crowley’s capabilities are described and organized in a clear way should be a priority. Labeling must be tested with real users to make sure that the site is speaking their language. Exercises such as card sorting can be designed to understand how customers think about Crowley’s services. If business units or other internal-focused grouping of services are used, they should be re-examined for relevance to the audience.

The re-designed Crowley website should offer *multiple ways* to find services. For example, many of Crowley’s services are specific to a geographic location. Not surprisingly, a number of stakeholders and customers interviewed for the project suggested that the site should offer the ability to see all of the company’s capabilities in their particular region. Browsing by industry may also be a useful feature.

The cross-selling and up-selling opportunities mentioned above should be taken advantage of as well. For example, while viewing the description of a particular service, a user may see a “Did You Know?” module that raises awareness of a complementary capability.

Finally, we should consider a “service finder” that allows users to answer simple questions or go through a “wizard” that finds the right service for them. For example, a form could be designed where the customer “fills in the blanks” about the kind of service they’re seeking (e.g., move something, fix a problem, manage a process), location, industry, etc., and the application returns relevant service options.

WHAT WE DO:	Services	Locations	Industries
	<a href="#">Liner Services / Ocean Transportation</a> <a href="#">Logistics</a> <a href="#">Offshore Construction Support</a> <a href="#">Remote Offshore Drilling Support</a> <a href="#">Petroleum and Chemical Transportation</a> <a href="#">Ocean Towing</a> <a href="#">Ship Assist and Escort</a> <a href="#">Emergency and Salvage Services</a>		<a href="#">Ship Design and Construction</a> <a href="#">Ship Management</a> <a href="#">Alaska Fuel Sales &amp; Distribution</a> <a href="#">Intermodal Cargo Moves</a> <a href="#">Trucking</a> <a href="#">Vehicle and Household Shipping</a> <a href="#">Warehousing and Distribution</a> <a href="#">Custom House Brokerage</a>

WHAT WE DO:	Services	Locations	Industries
		<a href="#">US - Mainland</a> <a href="#">US - Alaska</a> <a href="#">Central America</a> <a href="#">Caribbean</a> <a href="#">Cuba</a> <a href="#">Canada</a> <a href="#">Other Countries</a>	

WHAT WE DO:	Services	Locations	Industries
			<a href="#">Government</a> <a href="#">Petroleum and Chemicals</a> <a href="#">Consumer Goods</a> <a href="#">Fresh Fruit and Produce</a> <a href="#">Vessel Construction and Management</a>

Sample wireframe showing multiple browse options

## Visual Assets

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Crowley has a great advantage compared to many service companies—the work is visually rich. There's a strong “coolness” factor in Crowley's projects that comes from:

- Impressive vehicles and equipment
- Beautiful or harsh locations
- Large scale
- High risk and high reward
- Interesting characters

Photography and video of Crowley's operations tell the story much more quickly and tangibly than words can.

To that end, the website should make much stronger use of the wealth of available visual assets. While the current site was developed during a time when typical download speeds and screen sizes dictated small imagery, a lot has changed. The use of full-screen photography, quality resolution video, and rich interactive technologies (e.g., Flash, Silverlight, Flex) have reached the mainstream as users' access and equipment have improved.



# Content Management System (CMS)

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Crowley does not currently use a Content Management System (CMS) to manage its public sites. The current process involves requests sent to the technical team via an email chain with the prerequisite approvals from Corporate Communications or Legal.

Changes are then made by the technical team, and the modified files and content are copied to the hosting provider via FTP. The process for getting content updated on the site can be several days depending on the availability of IT resources to perform the task. These publishing delays not only inhibit timely content from making it to the web site, but also discourage business users from creating content updates more frequently.

Implementing a flexible and easy to use CMS will have the following benefits:

- **Timely content updates**  
Content changes to the website can be published automatically through a CMS workflow, which will solicit the appropriate groups if necessary for approval through email (e.g., business line manager, Corporate Communications, Legal).
- **Frequent content updates**  
The efficiency of the content publishing process enabled by the CMS will allow users to make frequent updates, keeping the content fresh and engaging to Crowley site users. More recently updated content will increase traffic, e.g., with government rule changes associated with Customized Brokers.

- **Minimize involvement of IT resources**  
Once the CMS has been set up, the automated publishing process will reduce the bottleneck for site changes due to the involvement of limited IT. It will also allow IT to focus on other priorities than content maintenance.
- **Decentralized control**  
Maintenance of different sections of the sites will be left to the business lines, who are the subject matter experts. Content will be more relevant when the authors are those who know their audiences best.
- **Consistent design**  
CMS templates will enforce the Crowley brand look and feel while allowing users who update the site the freedom to make all the content updates they need to make. This same process can also enforce the consistency of content, e.g., by requiring proper metadata.
- **Fine-grained access control**  
Using a CMS controls who has permission to change each section of the site, and who needs to approve changes—preventing inadvertent or unauthorized content.

## Lead Management / CRM

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One of the issues we heard most about during our stakeholder interviews is the management of inquiries from customers and prospects.

The Crowley websites provide contact information as a mix of email addresses, email forms, and telephone numbers. There is no shortage of ways for site users to reach out to the company. However, there are a number of challenges:

- **Misdirected inquiries**  
Because distinctions among Crowley’s various service offerings may not be clear to visitors, they often contact the “wrong” department. In addition, Web users in general don’t necessarily seek out the correct contact information—they just use the first link or phone number they see.
- **Poor follow-through**  
While Crowley employees do try their best to forward the phone or email inquiry to the correct contact, it’s an imperfect process. The party receiving the forward may still not be exactly right, so they need to forward it again. More importantly, there’s no consistent process to track these inquiries to make sure every prospect is addressed.
- **Lack of a centralized “clearing house”**  
Only a few individuals within Crowley have the experience and breadth of knowledge to correctly route all inquiries. However, those people have jobs that aren’t meant to focus on this kind of traffic management. Crowley does staff an 800 number, but the representatives there don’t necessarily understand the subtleties of the various business units.
- **Lack of reporting**  
There is no way to track the amount of revenue generated or lost through leads acquired from the site, due to the decentralized lead management process and a lack of process to record the interactions.

During stakeholder interviews, an anecdote was shared about a client who was routed by phone to approximately ten different Crowley employees around the country before getting the “right” person. This client actually ended up doing business with Crowley, but it’s likely that most prospects would have given up much earlier and abandoned the process.

The main fact to note is that while the Web may be the starting point for many of these inquiries, it’s primarily an *internal business process*.

Strictly from the Web side, all of the contact information needs to be carefully reviewed on a regular basis to make sure the correct individuals are listed. All email inquiries should be tracked so that potential customers don’t fall through the cracks. This fact suggests an approach that relies on routed email forms, rather than simple links to an individual’s email address.

Internally, the customer relationship management (CRM) system needs to be integrated with all forms of contact in order to empower follow-through with all prospects.

# Search

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Crowley's current in-site search engine is powered by the Google API. This solution provides a competent, straightforward search engine.

However, a more powerful search function could be to Crowley's advantage. Some features that should be considered include:

- **Type-ahead**

Sites such as Apple.com start guiding searchers from their first interactions with the search box. As letters are entered, the site dynamically suggests key content pages in a dropdown box. The advantage is that while a word like "iPod" appears in thousands of pages on the site, the search function can guide users to the primary "splash" page that provides an overview of the product. A similar approach could help users of Crowley.com.

- **Best bets**

Similarly, some solutions show the top recommended search result or "best bet" at the top of the page, visually highlighted in some way. Rather than working from an automated algorithm, these pages are often manually assigned by site administrators for the top anticipated search terms.

- **Faceted search results**

Another option for a search results page is to provide filters or "facets" that enable users to refine their results. For example, the user may be able to separate press releases or "About Us" page results from those that directly address the company's services.

- **Parametric search**

Similarly, it may make sense to offer parametric search, which allows users to specify multiple parameters or properties while searching. For example, they may want to search for a particular service in a specified location and/or industry.

- **Inclusion of subsidiary sites**

Ideally, searches executed on Crowley.com would also reference results from their subsidiary company sites, i.e., Titan, Jensen, and Customized Brokers. This improvement would help ensure that searchers seeking a specific service won't walk away thinking it's not available.

- **Thesaurus**

A thesaurus is behind-the-scenes website functionality that matches user search terms with content on the site. It allows users to find information even if their initial search term is not located. As a very simplistic example, if a user enters "boats," but the term "ships" is always used on the site, the thesaurus would serve up all "ships" search results instead—because the thesaurus says that "boats" equals "ships." On a site like Crowley's where industry terminology is prevalent, a thesaurus can be a real help to users.

- **Glossary**

While Crowley.com does include a basic glossary now, enhancing it would make it more useful. For example, linking glossary items to key content areas would serve as a subtle cross-sell, as well as improving search engine visibility.

- **Dynamic landing pages from search engines**

Helping users find the information they need actually starts off-site—at their favorite search engines. Dynamic landing pages allow us to direct visitors to a specific page on Crowley.com based on the search terms they entered in the search engine—rather than just sending all traffic to the home page. This approach eliminates extra steps and gets customers to the key content faster. *More details are available in separate SEO documentation.*

## Case Studies

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An impressive by-product of Crowley's many years in operation is a strong portfolio of completed projects. A review of these successful engagements goes a long way toward convincing a prospective client that Crowley can get the job done. And as discussed earlier, Crowley's work is visually rich. Many internal stakeholders felt that showing off the company's specific experience should be one of the key aspects of the site.

However, the current website does not do an optimal job of communicating these successes. While some areas include "Past Projects" or "Success Stories," they are spotty and not visually engaging.

Perhaps more importantly, Crowley employees don't have an easy way to update the site with success stories. Having to collect visual assets, write text, and publish the information to the site involved too many hurdles.

Part of the content management system (CMS) needs to be a user-friendly way to add case studies. A consistent but flexible template should be established to allow content administrators to independently update completed projects—as they happen.

## Language / Internationalization

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When speaking with stakeholders and customers outside of the United States, we asked whether translations of Crowley’s web content would be useful. The current site is only offered in English.

While the vast majority of Crowley’s customers do speak English, many stakeholders felt that additional language support would be helpful for certain areas of the site. Most prominently, Spanish would be an advantage due to Crowley’s reach in Central and South America.

Not only would additional languages have the potential to reach a wider audience, it would also show Crowley’s familiarity with and commitment to the local communities in which they operate.

One option would be to provide translations selectively, i.e., only in the sections that are most relevant to international audiences. This approach would reduce the labor and cost of offering alternate language support on the entire site—especially as content is updated more frequently on the future site.

A potential next step beyond translation is true internationalization. Not just language—but content, imagery, and even layout can be customized to a particular locale. Further research would be warranted to determine how high a priority to assign to this level of effort.

## Subsidiaries

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A decision has been made to maintain the sites for Titan Salvage, Jensen Maritime, and Customized Brokers as independently branded entities. Based on conversations with Crowley Corporate Communications and these subsidiaries, the reasons were:

- Each company boasts strong brand equity from their pre-Crowley days, which would not be wise to lose.
- A complete takeover by the Crowley brand could be a negative, e.g., in a situation where one of the subsidiaries might be working with a Crowley competitor.

Keeping stand-alone sites for these subsidiaries seems like a well-informed approach. However, the current navigation structure for getting to a subsidiary site is not ideal. To click on a primary navigation item (“Salvage and Emergency Services”) and be dropped into a completely different site is jarring. Different branding, navigation, and messaging likely cause confusion in users.

Crowley.com should create “soft landings,” where the relationships among the companies are explained and transitions between sites are not a surprise.

Once on the subsidiary site—whether linked from Crowley.com or accessed independently, there should be a clear gateway back to the parent site. In addition to clarifying the relationship between the companies, it provides for additional cross-sell exposure.



# B2B Sales Funnel - Revisited

The B2B Sales Funnel shown below matches sample Web features with the parameters discussed earlier in this document.

	1. Find	2. Appraise	3. Contact and Engage	4. Decide	5. Offline Sale	6. Post-Sale Service
<b>Focus</b>	Identification of potential suppliers	Qualification of identified suppliers	Evaluation of credibility and beginning a relationship	Assessment of best option among range of options	Value and efficiency	Ongoing communication and self service
<b>Aim</b>	Locate potential suppliers Determine competitive landscape Rule out poor matches	Evaluate services for appropriateness for project	Talk to a “real person” to establish a relationship and gather details Appraise initial level of service Consultation on best strategy	Evaluate Crowley in context of other vendors (or in context of doing nothing) Reach informed decision	Obtain best value for money Faith in integrity of delivery promise Establish details or working relationship	Understand project status at all times Maintain communication channels Easily adjust details
<b>Need</b>	Findability, e.g., personal referral or Web search engine High-level information about services, i.e., “Do they do this?”	Detailed capabilities Demonstration of experience Equipment specifications High-level pricing information Industry-specific information	Accurate contact information and quick response Tailored information on services Pricing Availability Personal connection	Safety information Objective endorsements Answers to follow-up questions or concerns	Legal agreements Financial arrangements Scheduling	Access to personnel 24/7 On-demand status updates Easy account / billing access Self-service ordering Information on complementary services
<b>Supporting Web Features</b>	Search engine optimization Robust in-site search Navigation by service, industry, location, etc. Solution finder	Company background List of services Case studies Vessel specifications General price lists Shipping schedules	24/7 general phone number Phone numbers for each service area Email forms by service area Leads tracking via CRM Live chat Collaboration space	Third-party endorsements / certifications FAQ Client list / references Event registration Micro-conversions	Detailed pricing Contracts Other legal documents Insurance / safety specifications	Service ordering Delivery tracking / status / alerts Account management Cross-sell / complementary services Pricing / schedule changes Bill of lading Mobile alerts

# Conceptual Design

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After approval of this document, the Conceptual Design process will commence. In this phase, we begin developing the overall design framework for Crowley's online presence. Wireframes and visual comps for key screens will explore navigation, interaction concepts, and layout.

Internal reviews will help iterate conceptual design prior to end user validation.

We will then develop a front-end prototype, illustrating a key click-through path of the future state experience. The prototype is used to validate the Conceptual Design with end users, gathering feedback and action items for subsequent detailed design efforts.