# Design questions and considerations for draft 05-16-2013

# **Questions:**

* The site is currently focused on the families with the **Save Now** focus. We’ll also need to focus funeral directors to a registration page as well. Would it be good to have a single **Register** link and let them select whether they are a family member or funeral director? I like the idea that this is client focused, and it’d be good to keep it that way, but we also want it to be clear for prospective funeral directors.
* When creating a client account, how much are we requiring them to fill out before we create the account? A case could be made where the user submits an email and password (and some basic information), and then allow them to modify their funeral preferences and information about the deceased when they want. It’s possible that they start using the site, and then realized they need a little more information about what services they need (i.e. metal casket vs. wood casket). During the registration, they would naturally be guided to fill out the entire form, but it would be saved until it was submitted.
* Funeral providers should be verified. They would create an account, and would need to wait to be allowed to bid on services. This is a sensitive business, and it’d be terrible if someone was getting quotes from places that didn’t exist. Someone who works for Obsequy would need to verify the legitimacy before they could be allowed to bid. They could still set up their profile and specify the service they provide.
* It would be a good idea to allow the account administrator of the funeral parlor who created the account the ability to add/remove users so others could become notified of incoming requests and service those as well.
* After a request for funeral quotes is submitted, can the user make changes? If so, under what circumstances? It’s possible (although challenging) to let a funeral director know that the client’s preferences for the bid that they had just submitted is stale. We could adjust the state of the funeral director’s bid such that they would need to confirm that their initial quote is still valid or allow them to adjust their price and resubmit.
* A similar scenario exists for the funeral director. Can they alter their price once they’ve submitted a bid?
* How are bids structured? Is it a single quote? Is the quote itemized? If so, what is the granularity?
* What are the criteria we are matching clients with funeral parlors? I’d suppose distance would be one, we could match services as well (e.g. some could be denoted as *must-haves* so they’d be required to have the service to bid on it). Initially I believe distance would be the only filtering criteria. The funeral parlors could specify a max distance to the burial, and the clients could also specify a max distance to the funeral parlors.
* Feedback for funeral directors needs to be discussed. I’d think a typical rating system and comments could be provided a la Yelp style.
* Payment: what is your strategy here? Do they pay for the entire service via Obsequy? I saw the 10%, but is that just your profit, and the rest is paid as a separate bill from the funeral parlor?
* How much information about the funeral parlor does the client see? I can see a case for low information, but I’m more in favor of full information. If I was using the site, I’d want to know who is offering this great deal. I’d want to be able to check them out for myself. I believe you had stated that you’ll be working out relationships w/the funeral service providers so they offer reduced rates for people who use Obsequy. If that’s the case, then they’d get a better price through the site than if they use the site to find a quote and book it themselves. In the past I’ve used travel sites to look for airfare, then check the airlines specific site, and most often it’s cheaper to use the travel site than their direct site.

# **Ideas and Considerations:**

* We love the idea that Obsequy provides some help and some help/tips for those who need it. This information should remain available to anyone who visits the site.
* We’ve created the idea of an online checklist, modeled after the **Pre-Planning Checklist** on the site. This site could also help them manage their week long process. The checklist would start with a typical list of 10 items, and allow them to add and remove items, and also set a time of when they want to be reminded that something needs to be done. These notifications would be done via email and/or SMS (text) messaging. Services are available for both.
* Documents: we could also pre-populate data in the documents based on information that they’ve provided in the registration process. At the least, the documents should remain available to any visitor of the site.
* An administration area will need to be included in the site to allow confirmation/suspension of funeral director accounts. This could also include an area to add/remove administrator accounts for Obsequy. Statistics collection could also be viewed here as well.
* It would be a good idea to provide a place where a potential user could enter a zip code of the desired burial area so they could see how many funeral providers there are. Initially it could be zero. We definitely do not want to lead them to believe that they are waiting for bids if no one is available to service it.
* Mobile: My first thoughts on mobile would utilize the same technology as the web page, but scaled in such a way that fewer features are available. I’m not sure what would be good for a new user, but funeral directors could see incoming quotes, and clients could monitor their requests and manage their checklists. I could see an option where we allow them the ability to access the full mobile site as well (this is becoming more common these days).

# **Next Steps:**

* Update designs based on input from discussions.
* Flush out additional questions and issues.
* Continue iterative design until all parties agree that the goals of the project are accounted for.

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# **Estimate:**

* At this stage no estimates can be provided. When the design of the project has completed, we will be able to provide an accurate assessment of the work involved.