

Enterprise Desktop Solution



Corporate User Experience Design

Outline

- ❖ Problem Statement & Vision
- ❖ Enterprise Desktop Framework
- ❖ Challenges & Next Steps



The Team

❖ Information Architects

- Wei Ding
- Marcy Morelli
- Michael Magoolaghan
- Bala Kalyanasundaram
- Nadia Moro

❖ Information Designers

- Jim Bemis
- Matt Flick
- Thuy Nguyen

❖ Our Partners

- Corporate Architecture Office
- Corporate Trident Business/Development Team
- IRPS business leads
- Retail business leads
- Retail UID
- QEG Development Team



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The Problem

❖ Separate solutions to a similar (or same) desktop aggregation/integration problem

- No clear direction for new desktops.
- Duplicate efforts in the past and future throughout the system development cycle.
- Overall costs offsetting benefits.

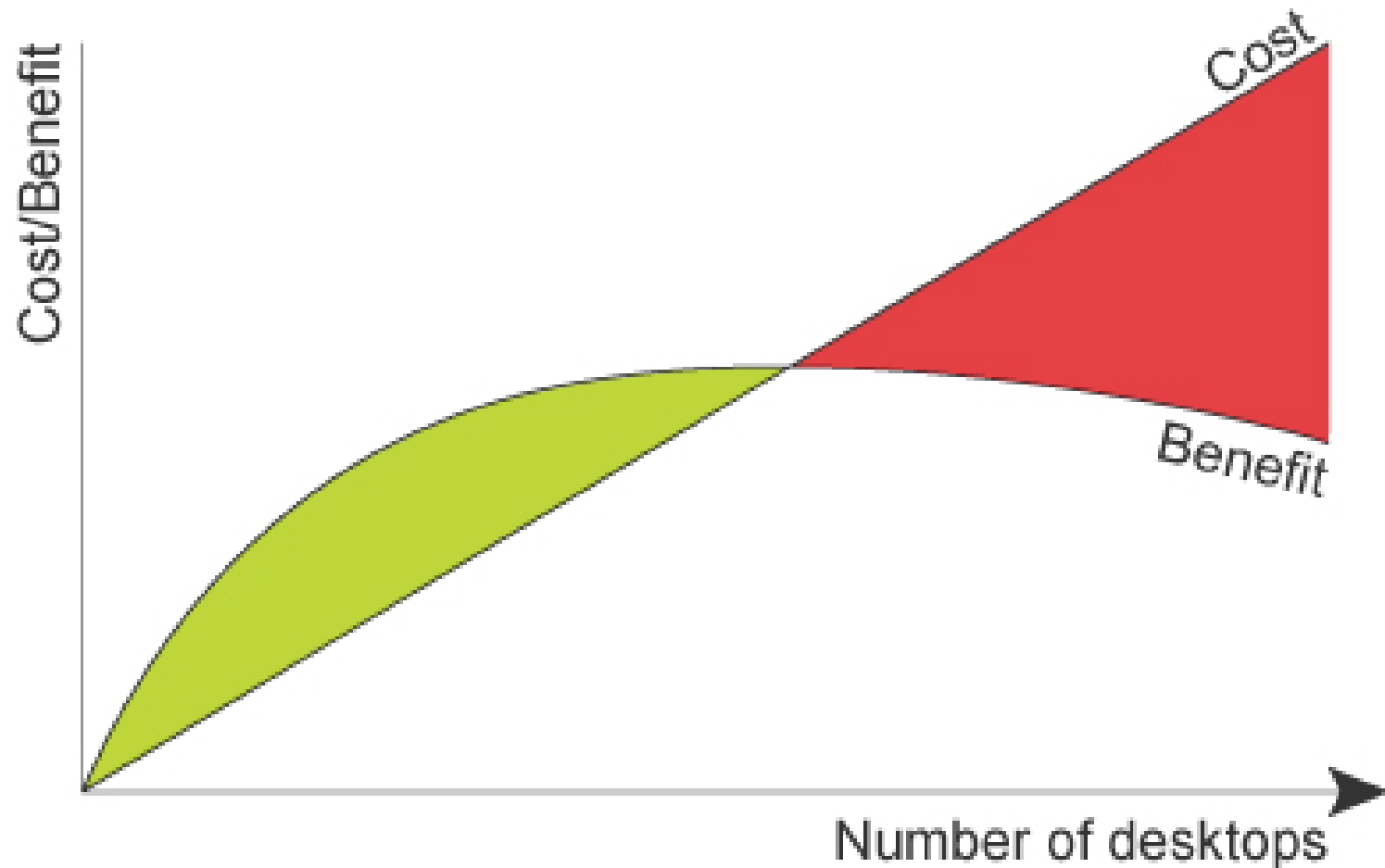
❖ Barrier to collaboration & reuse

- Being built on incompatible platforms limits sharing & collaboration
- Disconnection between desktops & Crewnet
- User learnability issue



Issue with Scalability

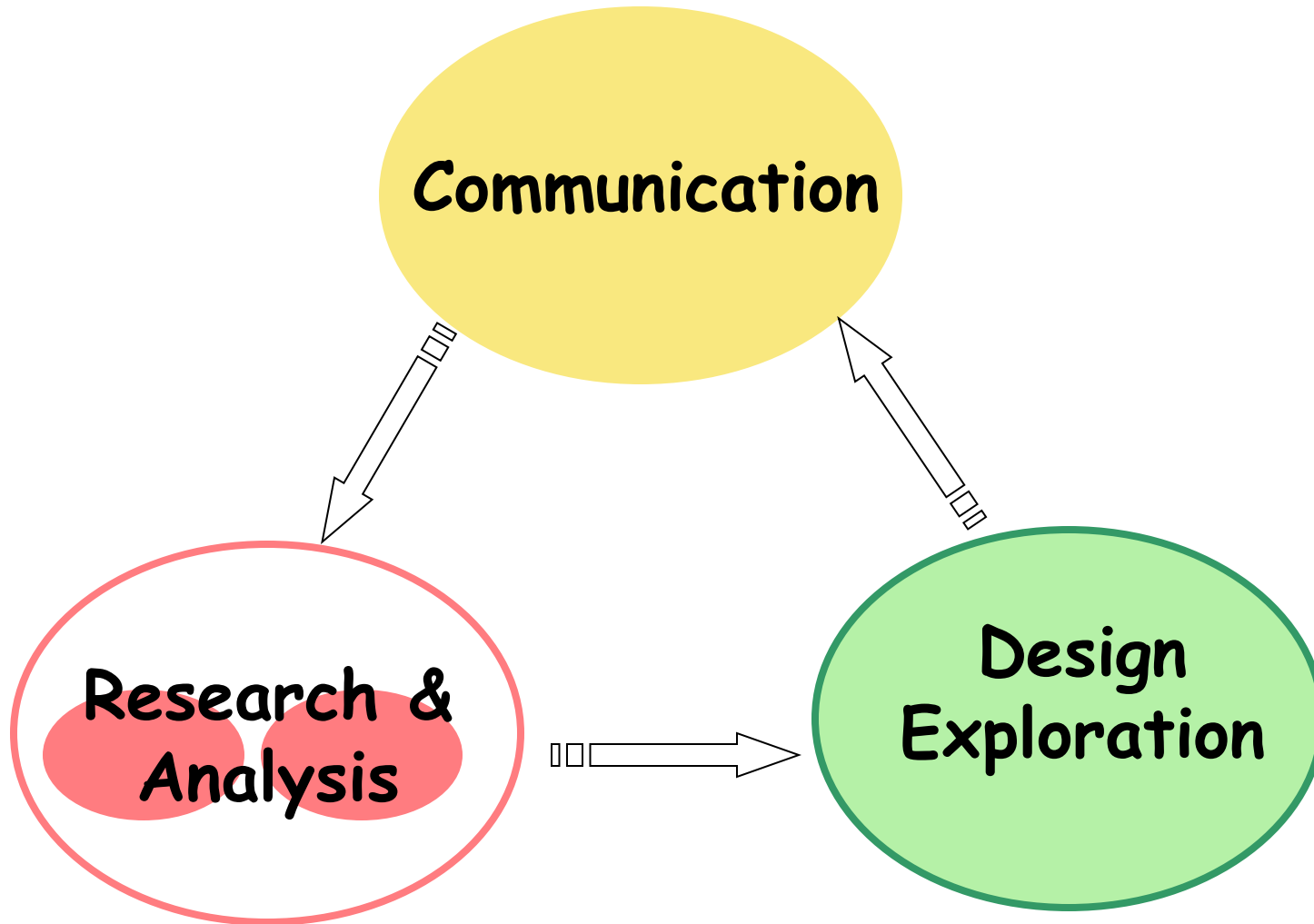
Separate effort



The Desktop Vision

- ❖ Addressing common problems holistically while meeting unique business and user needs.
- ❖ Maximizing benefits of sharable components and global utilities.
- ❖ Increasing cost-effectiveness & promoting collaboration and reuse.

The Desktop Journey



Desktop Capability Matrix

Universal Desktop Capabilities

High Level Capabilities/Functionality	FAS Internal Sales Rep	FAS External Sales Rep	FAS/IAM RM	FAS/IAM Operations	IAM Full Service Sales Rep	FAS External Sales Rep	FFS Associate	IRPS RM	IRPS Account Admin.	IRPS Universal Associate	Participant Services
Aggregation of applications	1	1	1	1	1		1				
Interactivity of applications	1	1	1	1	1		1				
Maintain states of applications	1	1	2	1	1		1				
Flexible layout	1	1	1	1	1		2				
Internal people search	1	1	1	1	1		1				
External people search	2	2			2						
Internal people address book	1	1	1	1	1		1				
External people address book	1	1	1		1		1				
Detachable views (duplicate copies)				1							
Information search - policies and procedures	1	1	1	1	1		1				
Information search - data, activities, transactions	2	2	1	1	2						
Smart data/application relationships							1				
View based on user type							1				
Multiple user views available							1				
Task lists	1	1	1	1	1						
- pre-packaged set of tasks (ex. List of common activities)	1	1	1		1						
- application generated (ex. Outcalls)	1	2	1		1		1				
- self assigned (ex. To do's)	1	1	1	2	1						
- delegated tasks (ex. Assigned to do's)	1		1								
Client relationship management (CRM)	1	1	1	1	1						



Design Explorations

❖ Vanguard Desktops

❖ Related Work

- Microsoft Research on window management and task management
- Internet Aggregators
- Newer Web Browsers
- Portal solutions: IBM & Sungard
- Google Desktop



Business Needs & User Needs

❖ Business Lines and Groups

- Retail, IRPS, FAS/IAM, Corporate FFS

❖ Personas

- Total of 35 unique personas

❖ Vanguard Job Families and Job Titles

- 26 Job Families and 156 Job Titles

❖ *Working Styles & Job Functions* identified

- Working Style
 - Event-driven
 - Self-paced
- Job Function, e.g., call center, processing center, client relationship management, data administration, etc.



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Working Styles & Job Functions Identified

❖ Job Functions

- Call Center
- Processing Center
- Customer Service
- Client Relationship Management
- Data Administration
- Reporting
- *Managers/PMs/Executives*
- *Investment Professionals*
- *Other*

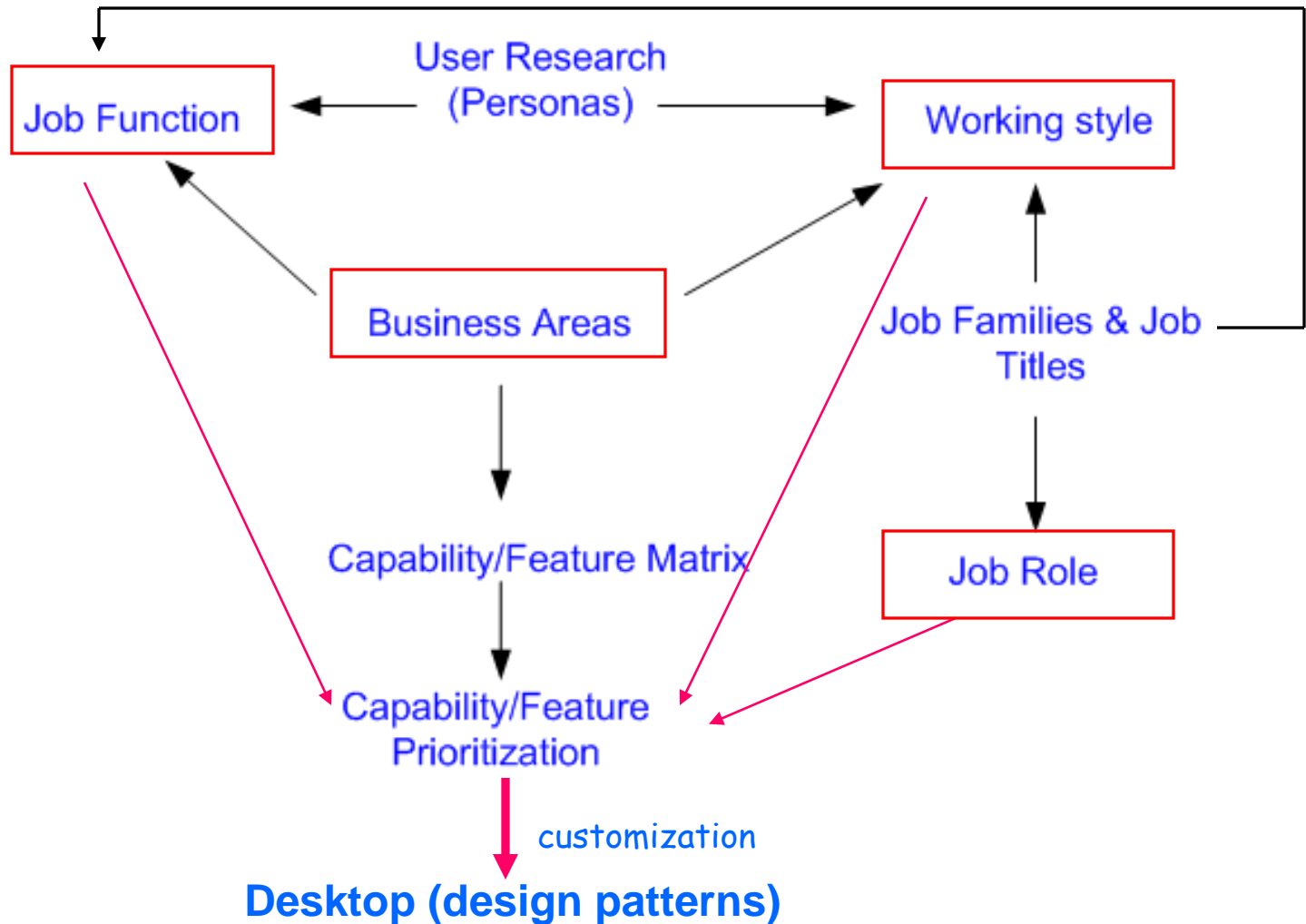
❖ Working Style

- Event-driven: performing time-critical tasks and needing help to maintain agility
- Self-paced: needing support for multi-tasking, dashboard views for prioritization, quick recovery from interruptions,



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Desktop Formulation



Enterprise Desktop Framework

- ❖ Each desktop derived from the same framework
 - Containing a subset of desktop components
 - Meeting unique needs via “attributes” identification and customization
- ❖ Carries on strengths of existing desktops & takes advantage of shared services
- ❖ Component-based development more cost-beneficial
- ❖ Better scalability and flexibility



Approaches Explored

❖ Ideal Model

- Ownership of unified infrastructure and enterprise platform, on which core components are built
- Additional components contributed by each organization
- Profile-based view of the desktop with consistent user behavior & BCM compliant design elements

Maximum sharing

❖ Alternative Model

- Keeping status quo infrastructures & platforms
- Sharing enterprise components and reusable components developed by each organization
- Unified desktop framework with profile-based views

Optimal sharing



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Example

The screenshot displays the Vanguard client portal for Ed Smith. Red boxes highlight the following elements:

- Client Search Bar:** Located at the top left, containing the client's name and ID.
- Navigation Bar:** A horizontal bar below the search bar with tabs for 'CrewNet', 'My Work', 'Personal Investors', 'Professional Investor', and 'Search'.
- My Shortcuts:** A dropdown menu in the top right of the navigation bar.
- Recent Activity:** A list of recent client activities on the right side of the page.

Client Information Summary:

Personal Information	
Name	Ed Smith
Address	2027 Sweetgum Ln Collegeville, PA 19426-3161
Daytime phone	444-444-4444
Birth date & age	12/20/1936 68 yrs, 2 mo
Gender	Male
E-mail	rbrookstone@comcast.net
Biography	Client biography lorem ipsum dolor sit amet, consectetur adipiscing elit

Relationships & dates	
VGI inception	03/18/1987
IIG inception	08/25/2004

Services	
Services	VBS Web

Master agreement information	
Master agreement	IIS System test
Master agreement number	13999
Master agreement type	Discretionary bank trust
Transacting NSCC number	1234
Operations segment name	Default
Operations segment queue	

Client account values	
Ed Smith	\$25,265.62
Total Vanguard Assets	\$25,265.62

IIG account values	
Total IIG mutual fund assets	\$223,329,692.32

Recent activity:

Date	Activity	Icons
03/24/2005	Additional Purchase	
03/18/2005	Elevated Call	
03/02/2005	Inquiry - Funds	
02/27/2005	Inquiry - Account Balance	
02/27/2005	VOG - Funds - Fund Distributions	
02/15/2005	Additional Purchase	
02/15/2005	VBS Trade	
02/01/2005	Address Change	
01/06/2005	How to - Open a VBS acct	
12/23/2004	Address Change	

FAS Desktop

Client Search ABC Company 810-381-9731 Tier A - Broker Dealer Control 1 Control 2


http://advisors.vanguard.com My Shortcuts

CrewNet FAS Siebel Institutional Admin Search

1 2 3 Hold Conf After Call Auto In

Release Aux Tools Trans Drop Log Off

Financial Advisors Log on Institutional trading Site help Contact us Search



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Functionalities of the Desktop

❖ Information space aggregation & application integration for job efficiency

- Easy access to all critical applications/sites and tools
- Meaningful connections between applications to minimize manual steps & human errors
- More integrated intranets

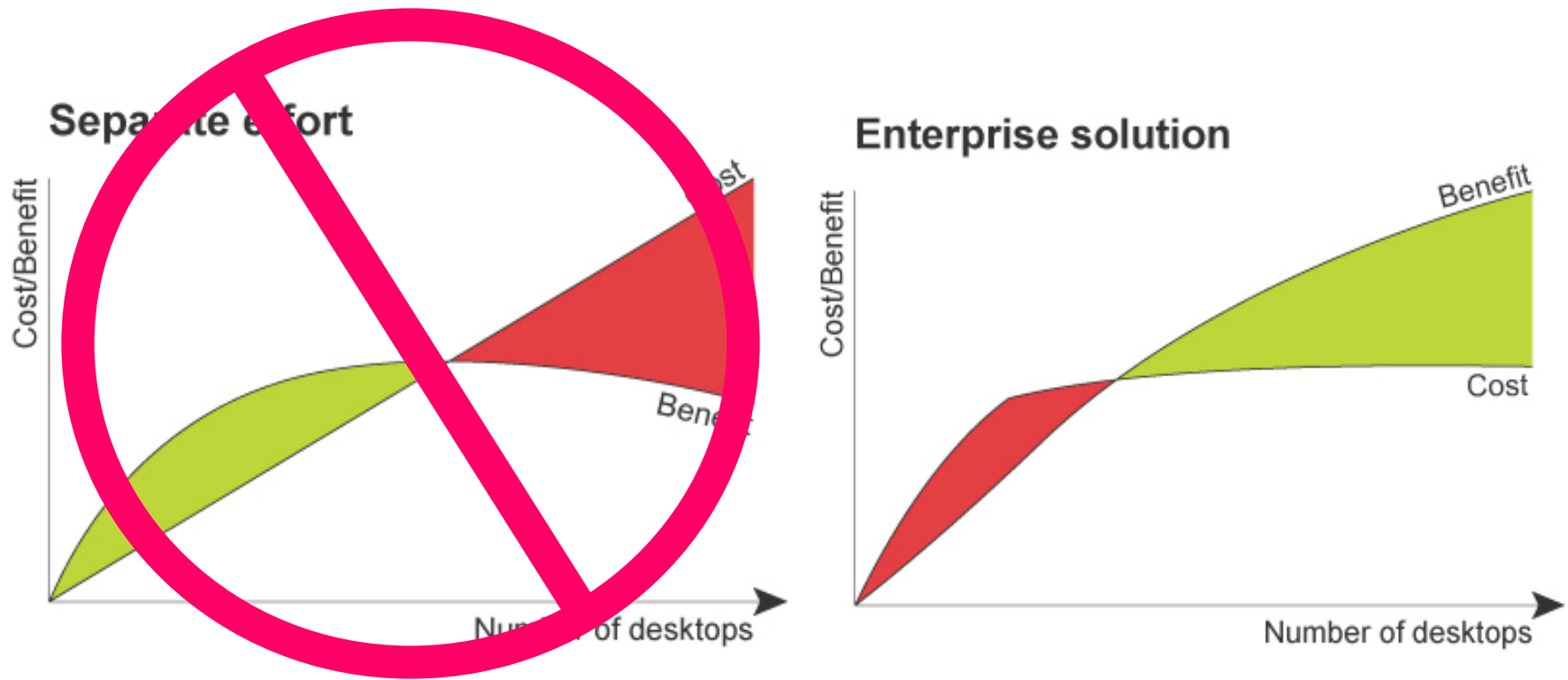
❖ Easy access to global utilities & shared services

- Federated search
- Aggregated calendars
- Bookmarks
- Addressbooks
- Alerts, feeds, reminders

❖ Group tools based on aggregated usage to support collaboration & sharing



The Shift



Desktop Assembly Tool

- ❖ Captures desktop design knowledge and design patterns for reuse
- ❖ Simplifies and expedites the desktop visioning process
- ❖ Attributes identification → customization → Desktop visioning screens
- ❖ Option for reuse of existing desktops



Desktop Wizard

☒ Create a new desktop ☐ View existing desktops

Step 1: Create a new desktop

How many monitors:

- ☒ One monitor setting
☐ Two monitor setting
☐ Two plus monitor setting
☐ Specify monitor setting

Continue

▶ Step 2: Describe the workers who will use this desktop

▶ Step 3: Select the primary applications for the desktop

▶ Step 4: Select global utilities



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Step 1: Create a new desktop

How many monitors:

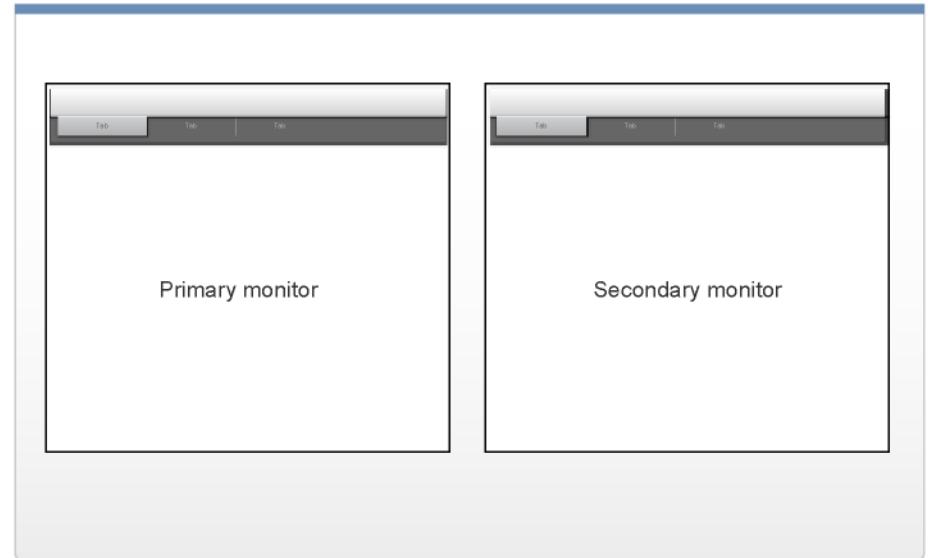
- ☐ One monitor setting
☒ Two monitor setting
☐ Two plus monitor setting
☐ Specify monitor setting

Continue

▶ Step 2: Describe the workers who will use this desktop

▶ Step 3: Select applications and tools for the desktop

▶ Step 4: Select global utilities



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Step 1: Create a new desktop

How many monitors:

- ☐ One monitor setting
☒ Two monitor setting
☐ Two plus monitor setting
☒ Specify monitor setting

Primary monitor:

Select monitor size ▼

Select monitor resolution ▼

Secondary monitor:

Select monitor size ▼

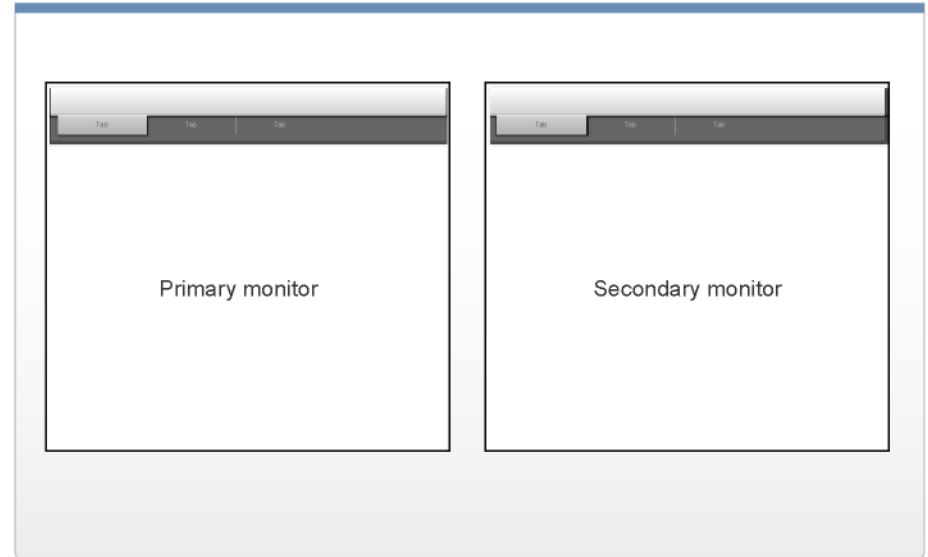
Select monitor resolution ▼

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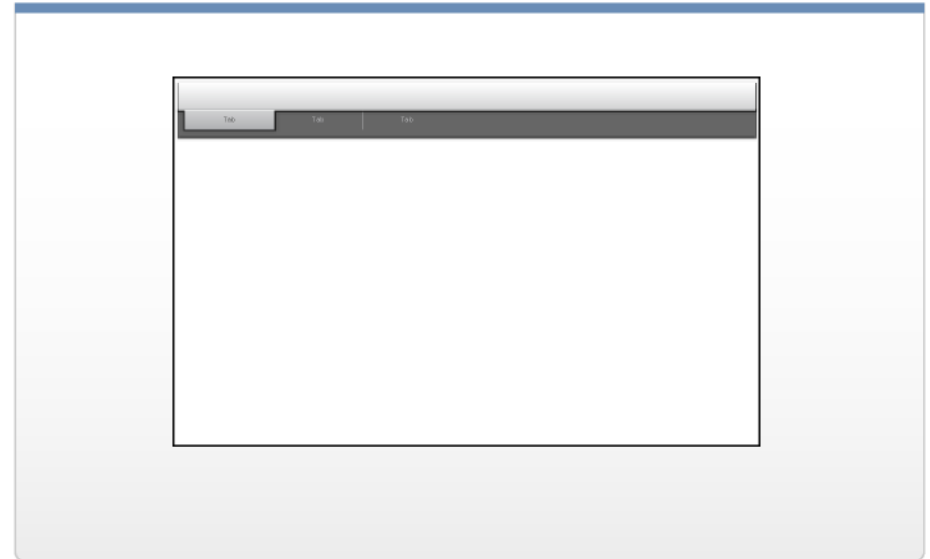
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Desktop Wizard

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Job function:

- ☐ Call center
- ☐ Processing center
- ☐ Customer service
- ☐ Relationship management
- ☐ Data administration

Working style:

- ☐ Event driven
- ☐ Self paced
- ☐ Both

Roles involved:

- ☐ Individual
- ☐ Supervisor/Manager
- ☐ Helm/Conn

Business areas:

- ☐ FAS/IAM
- ☐ IRPS
- ☐ Retail
- ☐ Corporate
- ☐ Other, specify

Client(s) being served:

- ☐ Internal
- ☐ External

Special capabilities:

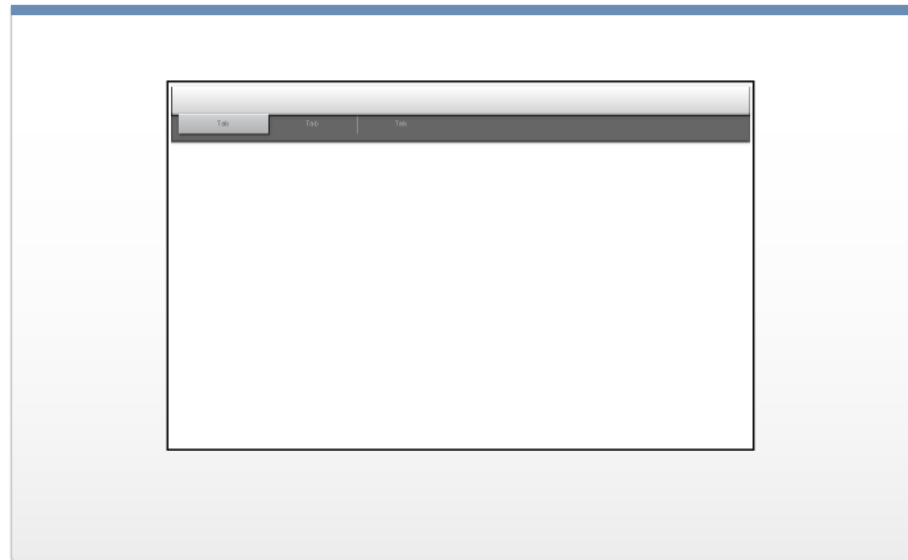
- ☐ Resource management
- ☐ Work monitoring

Back

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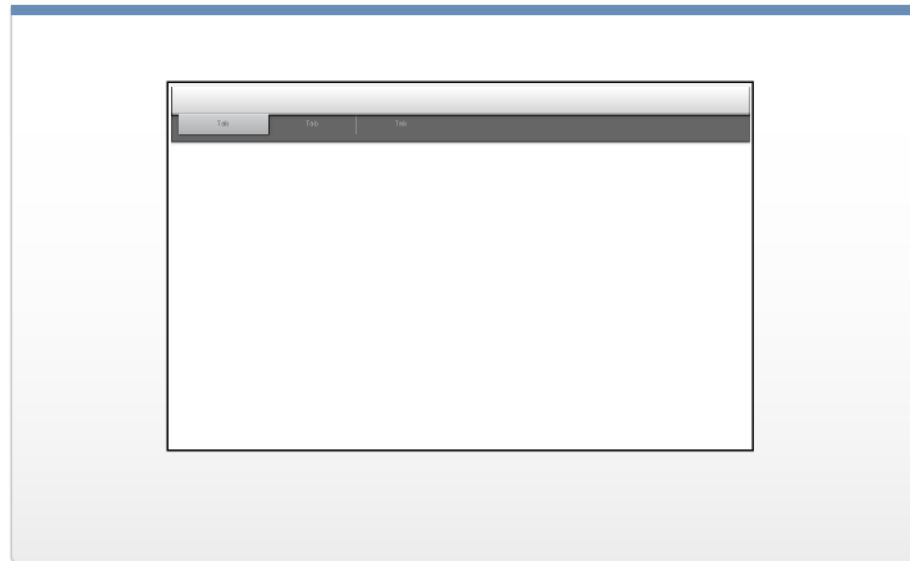
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Are simultaneous views of apps required?

- ☐ Yes
- ☐ No

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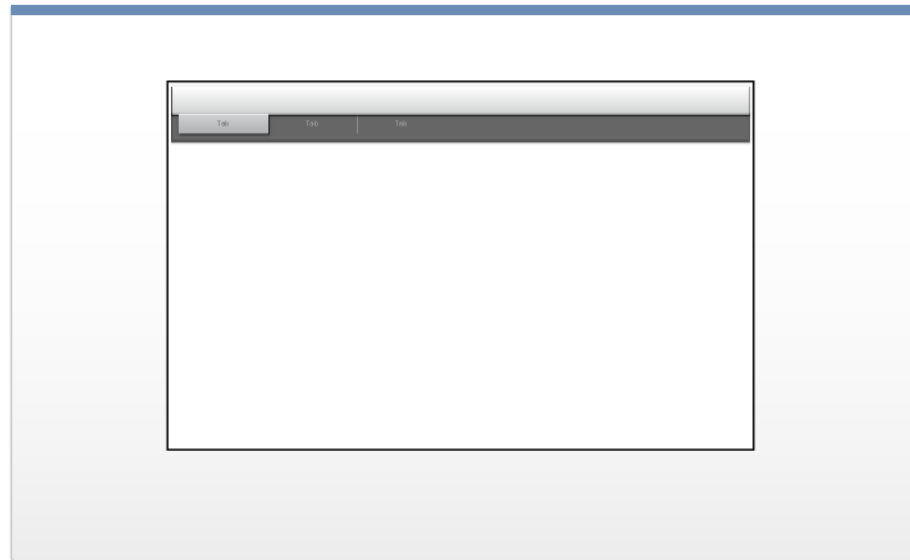
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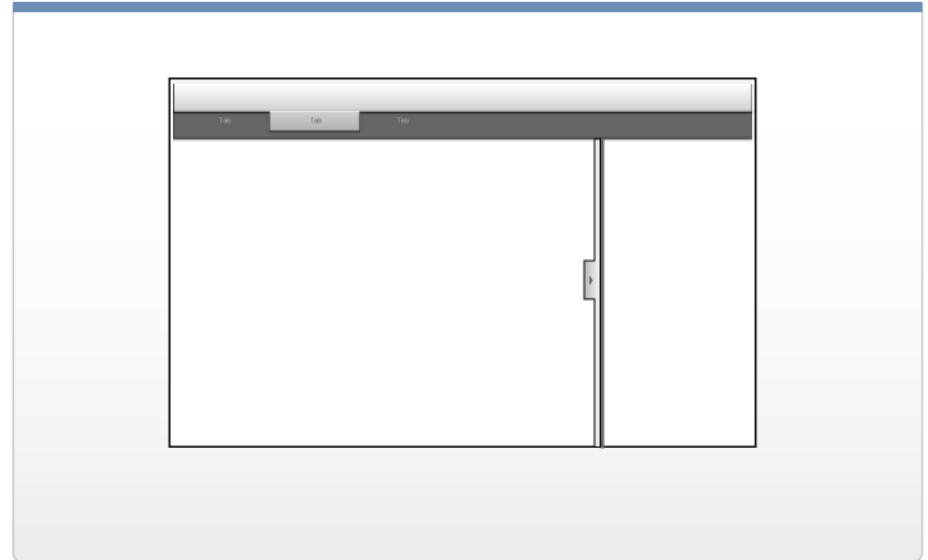
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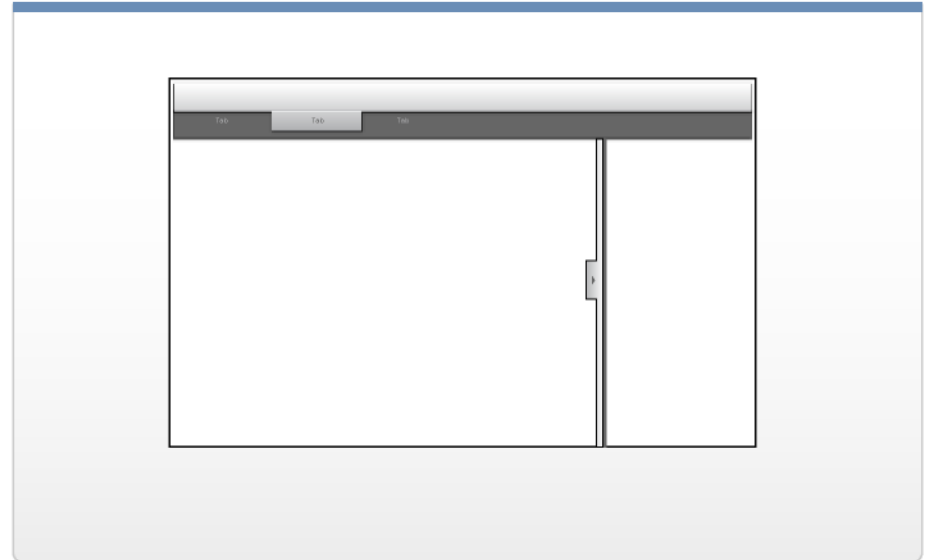
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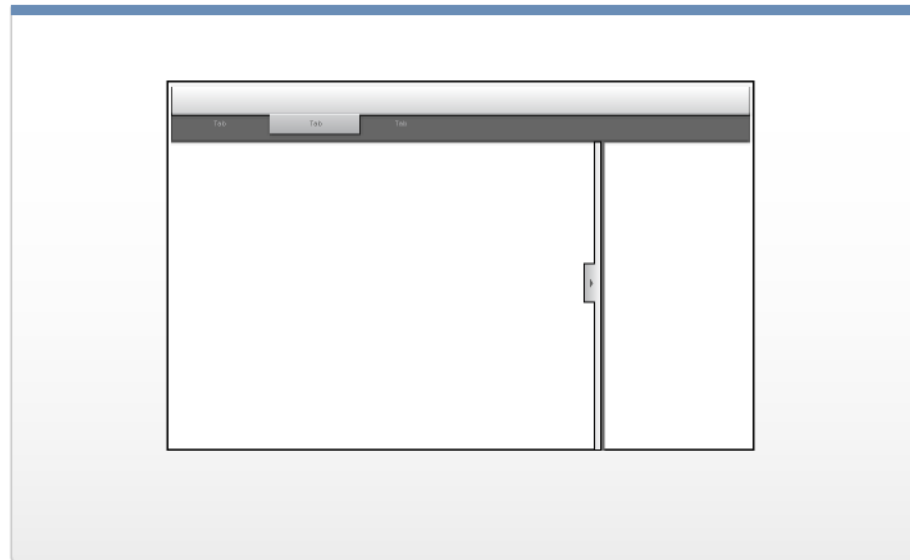
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Primary applications

Add

- ☒ CrewNet
- ☒ Worklist
- ☐ Plan Setup
- ☐ PE/PlanInfo
- ☐ Bridge site/WIN
- ☐ Siebel
- ☐ PE/WIN
- ☐ Lotus Notes

[Suggest new application](#)

Secondary applications

Add

- ☐ Resource Management
- ☐ Work Monitoring
- ☒ Softphone
- ☐ Contact Management

Application controls

Edit

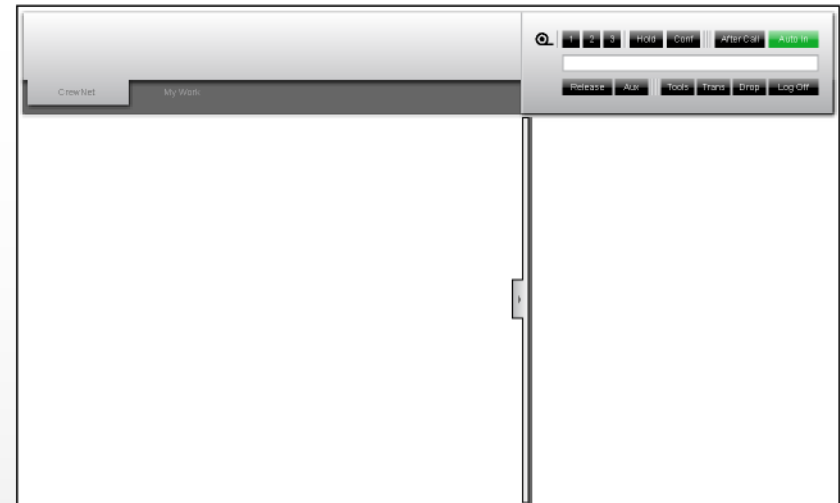
- ☐ Control 1
- ☐ Control 2
- ☐ New Window

Back

Continue

▶ Step 4: Select global utilities

 Zoom in



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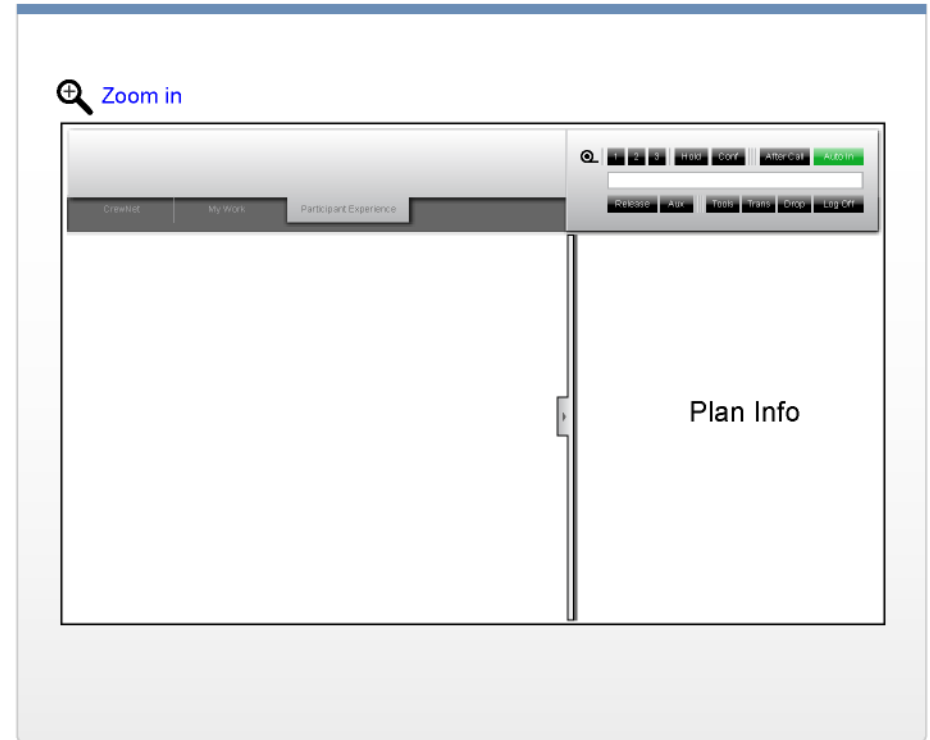
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Search engine list Add

- ☒ Organization ID search (default)
- ☐ Client ID search
- ☒ CrewFinder
- ☐ Federated search
- ☐ InfoWave
- ☐ Documentum
- ☒ Google
- ☐ Yahoo
- ☐ MSN search

Global utilities Add

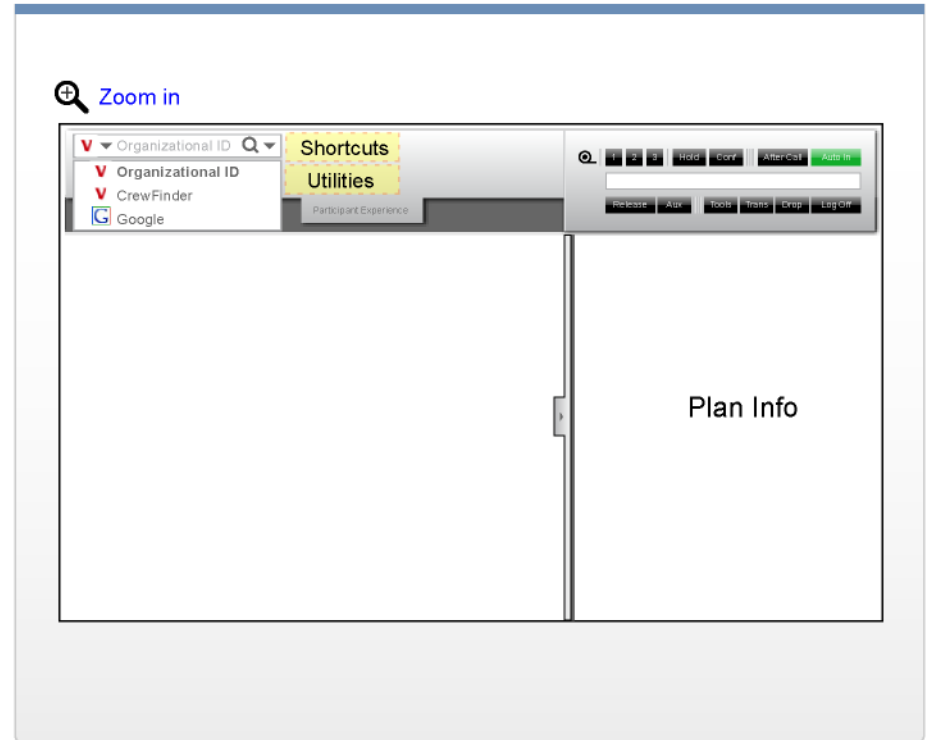
- ☐ Alerts
- ☐ Reminders
- ☐ Aggregated Calendar
- ☐ My Contacts
 - ☐ Group contacts
 - ☐ Internal contacts
 - ☐ External contacts
- ☐ Notepad
- ☐ Click to Chat
- ☐ To-Do List
- ☐ Vanguard Time Zone
- ☐ Weather

Shortcuts Add

- ☐ Personal tools
 - ☐ My Bookmarks
 - ☐ My CrewNet Pages
 - ☐ My Apps & Tools
 - ☐ My Dashboard
- ☐ Group tools
 - ☐ Bookmarks
 - ☐ Templates
 - ☐ Dashboard
 - ☐ Contacts
- ☐ Department tools
 - ☐ Dashboard
 - ☐ Department site
 - ☐ Wikis
 - ☐ Blogs

Back

Submit



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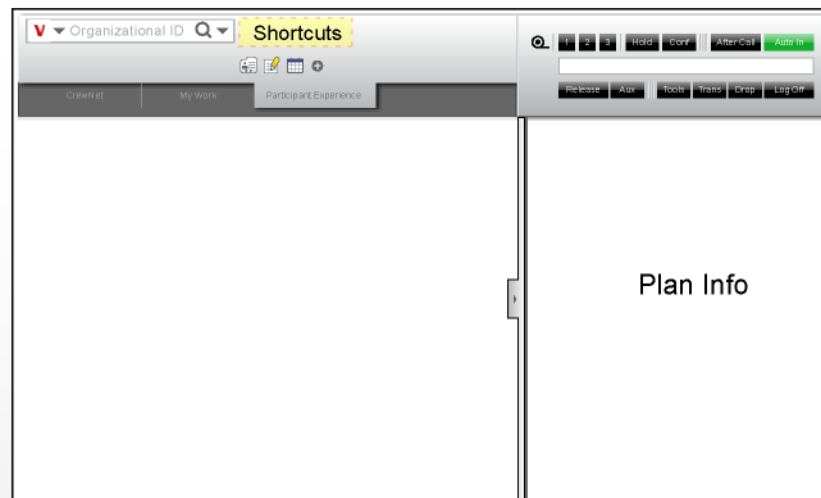
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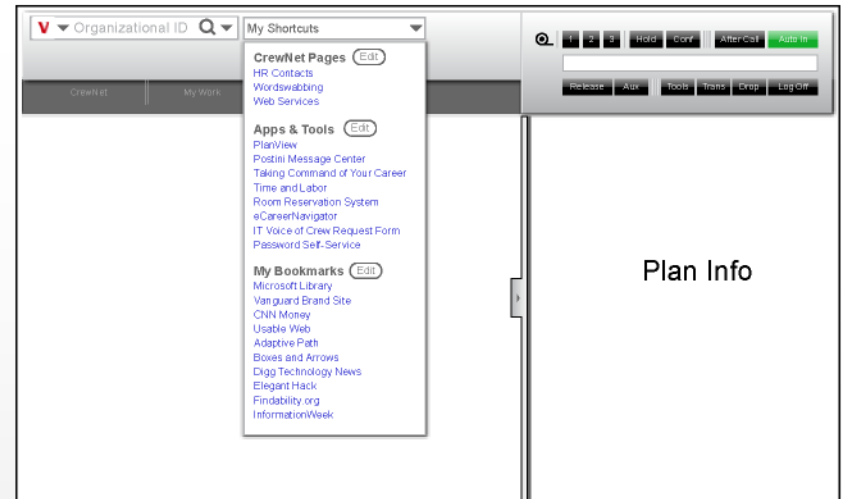
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🔍 Zoom in



Desktop Wizard

- ☐ Create a new desktop
 ☒ View existing desktops

Choose an existing desktop to view

- ☐ FAS
☐ RKS
☐ TIDE
☒ WAVE

WAVE Desktop Overview

Targeted Users:

- 1.) Retail phone associates.
- 2.) Processing associates.

Key User Tasks:

- 1.) Answering client questions on account balance, transactions, and policies.
- 2.) Processing transactions based on client instructions.

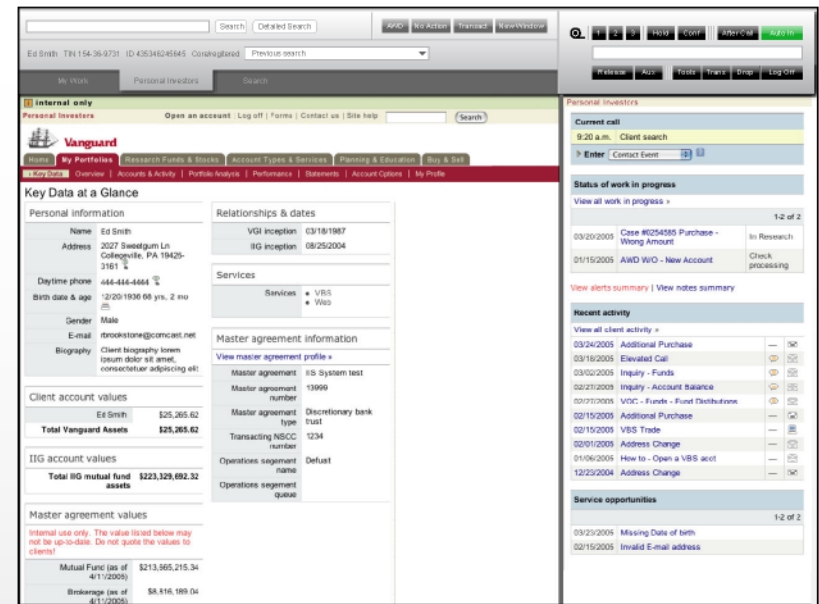
Desktop Characteristics:

- 1.) Defaults to key client data for phone associates upon receiving a call.
- 2.) Defaults to account activity for processing associates.
- 3.) Shared sites/apps are dependant on business units.
- 4.) Major components are connected based on client ID.

Major Components:

- 1.) Windows controller with search functionality.
- 2.) Softphone.
- 3.) Key client data.
- 4.) Contact events.
- 5.) InfoWave.
- 6.) AWD.

WAVE Desktop



The screenshot displays the WAVE Desktop interface for a client named Ed Smith. The interface is divided into several sections:

- Header:** Includes a search bar, navigation tabs (Home, Personal Investors, Search), and a user profile section.
- Key Data at a Glance:**
 - Personal Information:** Name: Ed Smith, Address: 2027 Sawdust Ln, Collegeville, PA 19425-3161, Daytime phone: 444-444-4444, Birth date: 03/18/1967, Gender: Male, E-mail: edsmith@comcast.net, Biography: Client biography: I own a small business and am a member of the local community.
 - Relationships and dates:** VBI inception: 03/18/1967, RGI inception: 08/25/2004.
 - Services:** VBI, VBO.
 - Master agreement information:** View master agreement profile, Master agreement number: 13999, Master agreement type: Discretionary bank trust, Transacting NSCC number: 1234, Operations segment name: Default, Operations segment queue.
- Client account values:**

Account	Value
Ed Smith	\$25,265.62
Total Vanguard Assets	\$25,265.62
- IRG account values:**

Account	Value
Total IRG mutual fund assets	\$223,329,692.32
- Master agreement values:**

Account	Value
Mutual Fund (as of 4/1/2005)	\$213,965,215.34
Brokerage (as of 4/1/2005)	\$8,816,169.04
- Recent activity:**

Date	Event	Status
03/24/2005	Additional Purchase	OK
03/19/2005	Elevated Call	OK
03/02/2005	Inquiry - Funds	OK
02/21/2005	Inquiry - Account Balance	OK
02/17/2005	VOC - Funds - Fund Distribution	OK
02/15/2005	Additional Purchase	OK
02/15/2005	VBS Trade	OK
02/01/2005	Address Change	OK
01/06/2005	How to - Open a VBS acct	OK
12/23/2004	Address Change	OK
- Service opportunities:**

Date	Event	Status
03/25/2005	Missing Date of birth	OK
02/15/2005	Invalid E-mail address	OK

Summary of Benefits

❖ For all parties

- Unified desktop creation practice
- Promotion of cross-organizational collaboration & sharing
- More integrated Intranets

❖ For the user

- Predictability for placement and interaction mechanism
- Learnability and cohesion of all Vanguard desktops (workflow, components, interaction, look & feel)

❖ For business

- Functioning like one company
- Saving time & money from duplicating efforts

❖ For development teams

- Taking advantage of enterprise services
- Reusing sharable components from other systems
- Easier maintenance and better scalability

❖ For UXG

- Identification and promotion of design patterns
- Harnessing the collective experience & expertise in desktop design
- Helping focus design effort on unique problems by leveraging proved solutions for known problems
- Contribution to BCM standards



Vanguard

Next Steps

- ❖ Identify business and IT sponsors
- ❖ Pilot with real projects
 - E.g., OEi, VIPs or RM
- ❖ Feed into the UXG cohesion effort
 - Usability validation
 - Refining design & applying internal standards
 - Enriching the knowledge base of desktop design



Thank You!

Questions and Discussions