

Understanding page templates & navigation within the new Resource Center

Defining page structure & reason to determine use of content and how to navigate content

Agenda

1 - What are the page templates and how are they defined?

2 - How does a Home Page affect content?

3 - How does an Aggregate Page affect content?

4 - How does a Sub-Aggregate Page affect content?

5 - How does a Topic Page affect content?

6 – How to understand Categorization and Tagging/Filtering (Taxonomy)

What are the page templates and how are they defined?



What are the page templates and how are they defined?

- To understand “page templates” we must understand that view-ability of the Resource Center (RC) will be done through some type of “web browser”.



- Traditionally, there are several layers of “page templates” a user/client will go through to find what it is they are looking for.
- In Most cases, a user starts at a “Home/Landing Page” and moves through various pages to end on a “Topic Page”; or the end result.

What are the page templates and how are they defined?

- The process of moving through the RC can be done several ways, but for purposes here, we'll simply state, the user has a question that must be answered.
- In LPL's case, the user may use page templates in this way:
 - The user will land on a **Home Page** on the RC/CMS where they will seek out a top level “general” answer to their question which then leads them to an
 - **Aggregate Page** that contains multiple options to a single question. When an option is deemed appropriate , the user is then moved to a
 - **Sub Aggregate Page** which may contain more specific singular answers to the singular question however, like it's predecessor, may have multiple display items and even more options. The user then finds their interest and clicks onto a
 - **Topic Page** that contains one answer or one display item that is the total answer to the original question

How does a Home Page affect content?



How does a Home Page affect content?

- **Home Pages** customarily display a “snapshot” of the total site function.
- In LPL’s case, what is viewable on the Home page depends on overall business needs and what is driving the business at the time.
- Content on the **Home Page** is usually graphically driven with short, concise entries of sub sets of data.
- It is important to note that the most important items that one wishes to convey should always display “above the fold” or within the window line of a site.
- On the next page you will find familiar **Home Pages**.
- Can you see similarities though these are all very different businesses?

How does a Home Page affect content?

LPL@WORK My Links Search site or people

home page about us myHR policies & procedures work tools employee community

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- Thank You for HR
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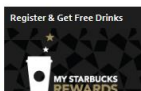
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How does a Home Page affect content?

- Did you find the similarities delivered by appropriate content use?
 - Immediate recognition of what the site does
 - Immediate understanding of what the site wants you to choose first
 - Alternative ways to move around the site
 - Top Level “suggestions” which “should” answer the general question of the user
- LPL @ Work, Target, Starbucks, and NBC New are all, in their own way, Content Management Systems!
- It is up to us to use content in a way that makes sense for those who are going to use the Resource Center so that they can, intuitively use it.

How does an Aggregate Page affect content?



How does an Aggregate Page affect content?

- As stated earlier, an **Aggregate Page** attempts to give the user multiple options to “answer their question”.
- In this case; let’s think of a “general question”
 - Where do I want to eat?
- If you were to type that into a browser, a number of items will come up, think of this as an **Aggregate Page**.
- Take a look at a graphic representation of this concept on the next page

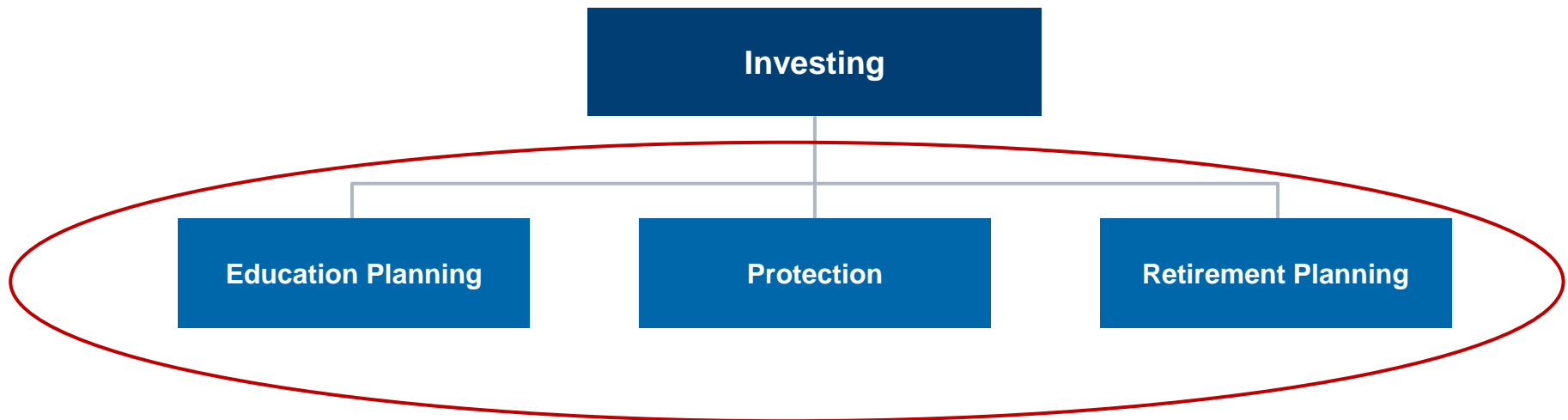
How does an Aggregate Page affect content?

- If the question was posed on a website, three options may appear on the next page, an **Aggregate Page**
- In this case, the options are Italian, Chinese, and Deli



How does an Aggregate Page affect content?

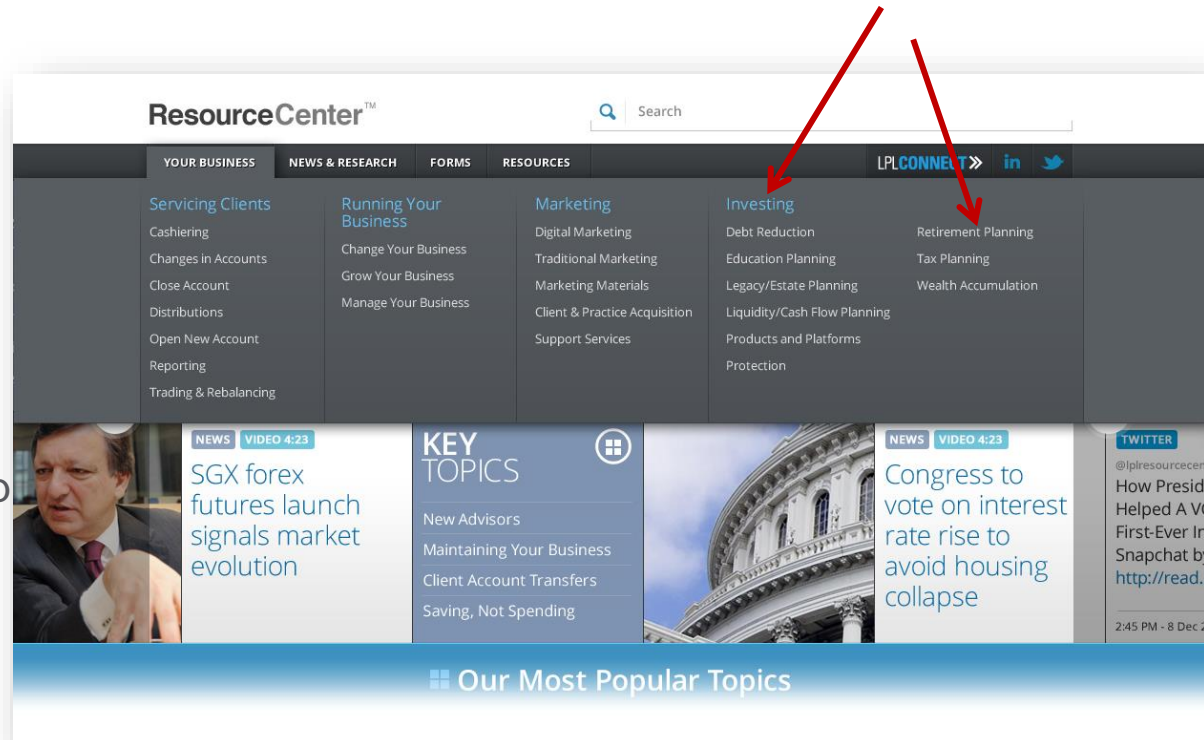
- In the case of content on **Aggregate Pages**, each of the three types of eateries wants to be represented when a user asks the specific question, “Where do I want to eat?”.
 - They want to be an option
- Now consider these eateries “business units” of LPL, and let’s change the question
- Where do I find information about “Investing”?



How does an Aggregate Page affect content?

- Within the new LPL RC model, users could use various ways to move towards an **Aggregate Page**. In this instance, they would use the top navigation mega menu.

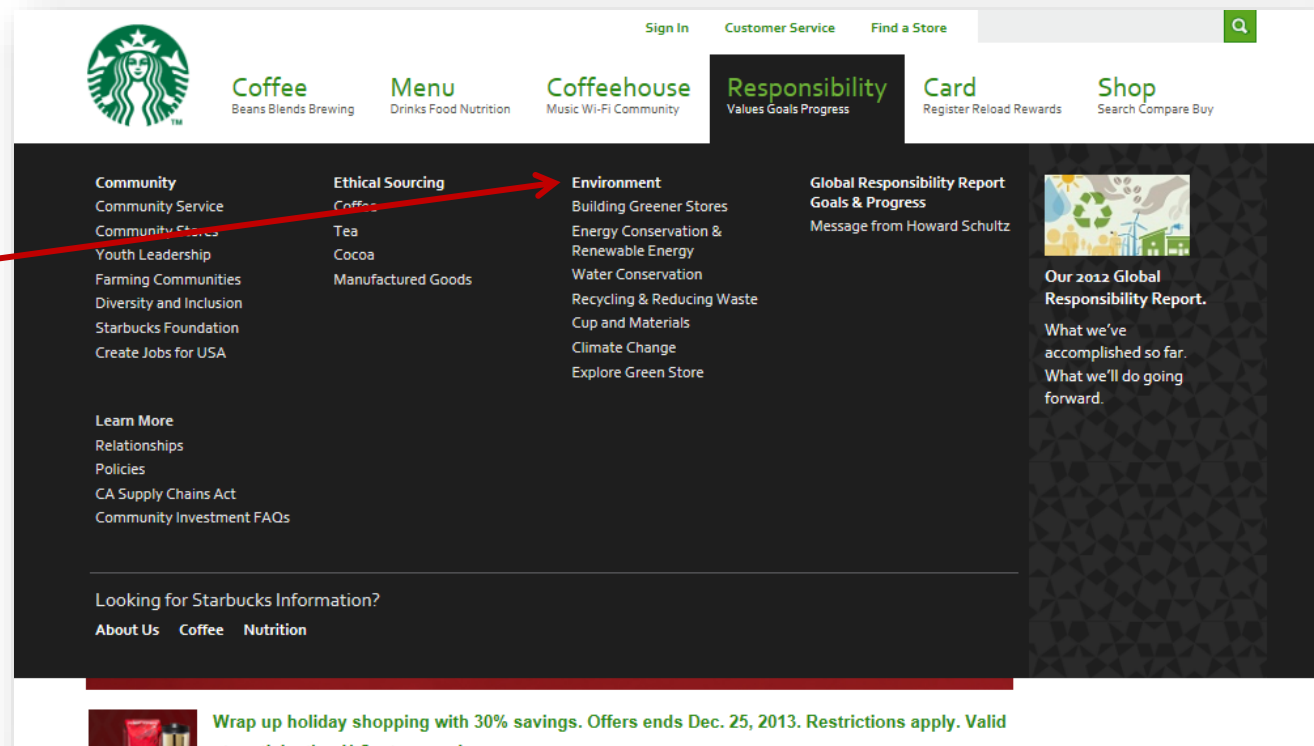
– Here is a graphic mock-up



How does an Aggregate Page affect content?

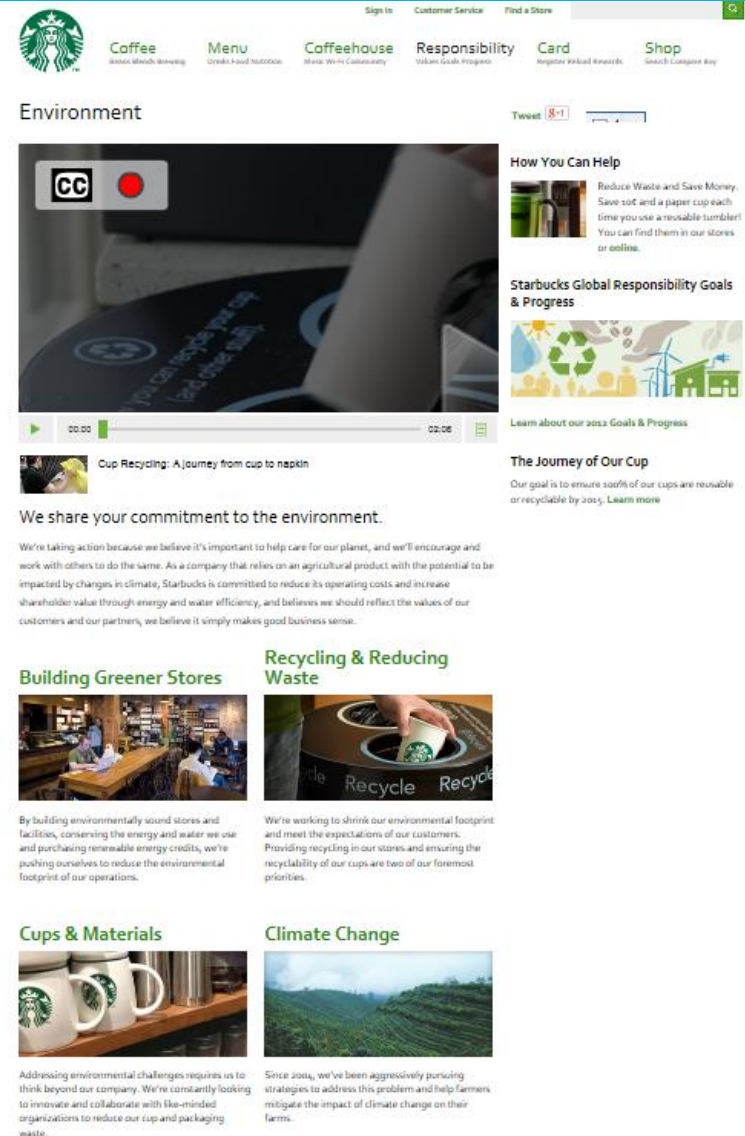
- Now let's look at some real-world examples of **Aggregate Pages**.
 - Let's say you were curious about Starbucks take on the environment, your question may be; "What does Starbucks do for the Environment"?
 - You would then go to www.starbucks.com and look for the answer.

The link was found within the top navigation bar



How does an Aggregate Page affect content?

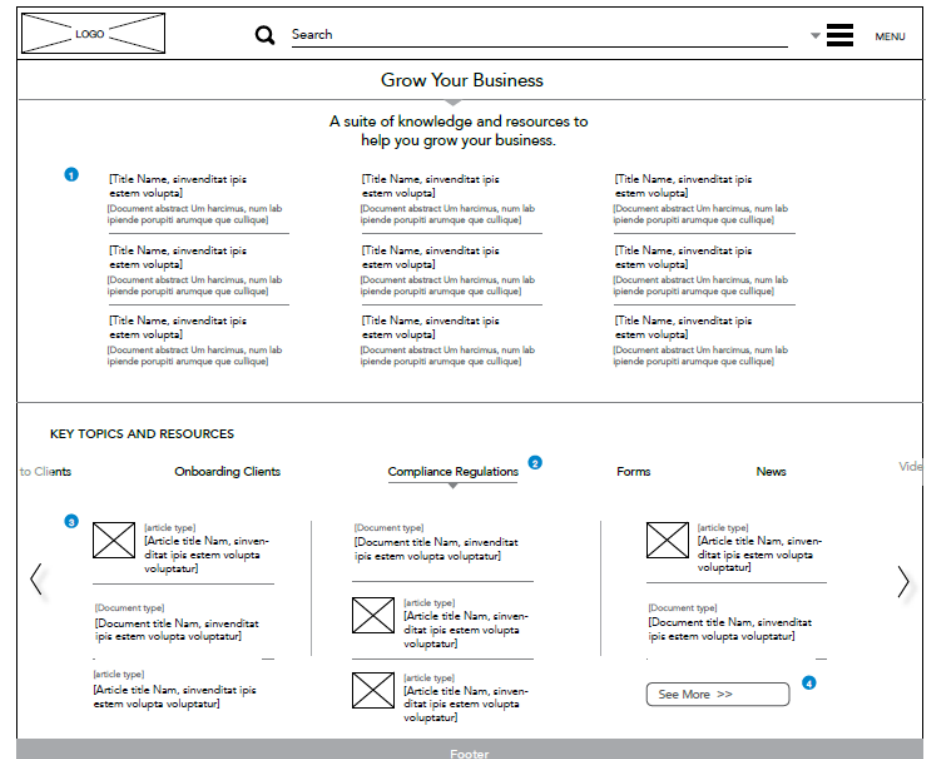
- Though shrunk down here for space, this is a clear view of an **Aggregate Page**. The page understands that I want to look into Starbucks and how it deals with Environmental issues, but it also supplies me with multiple options to drill down even further.
 - <http://www.starbucks.com/responsibility/environment>
- So if we were to tie this back to the LPL example, the **Aggregate Page** would be “Investing” instead of “Environment” and the subsections (or content) would point to Education, Retirement, and Tax.



How does an Aggregate Page affect content?

- Now that it is understood that an **Aggregate Page** can display multiple options for users that span multiple business units, let's look at our early mock up's here to see where our content, in the "Investing" model would work.

3.3 Aggregation Page



How does a Sub-Aggregate Page affect content?

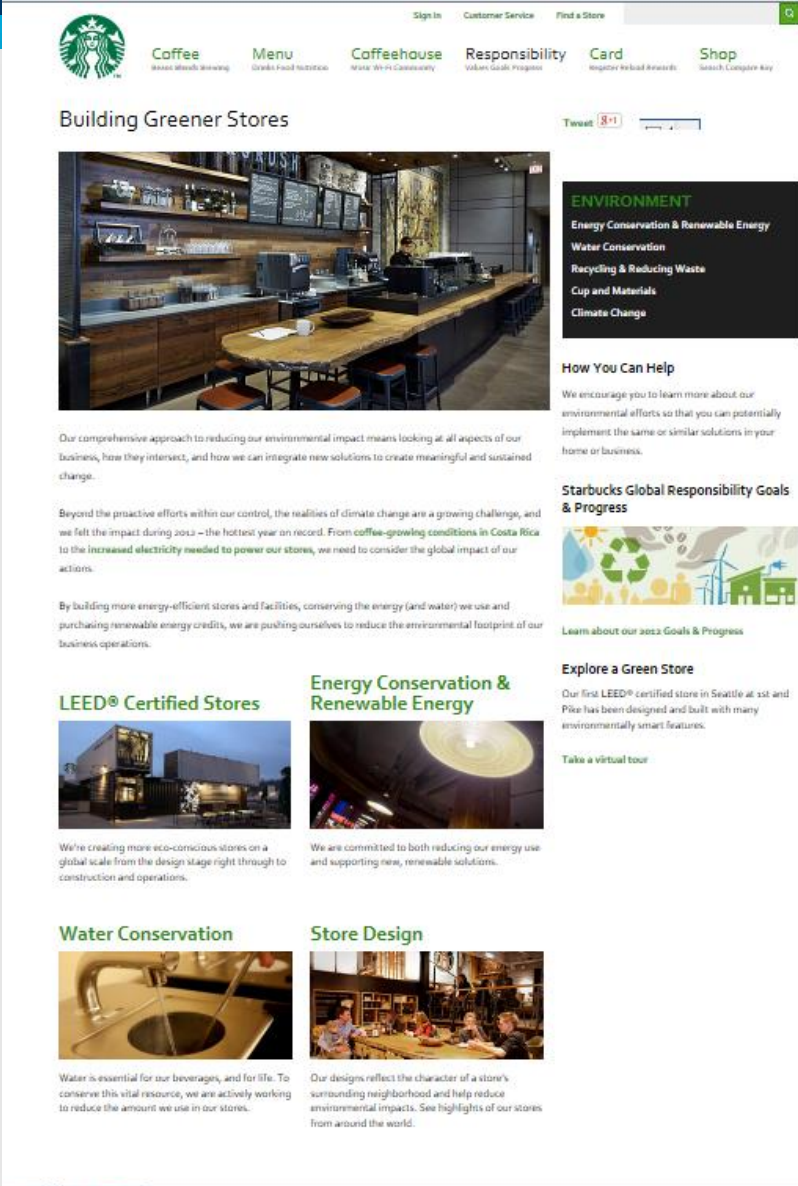


How does a Sub-Aggregate Page affect content?

- While Aggregate Pages normally supply the user with options, **Sub-Aggregate Pages** drill down options into tasks or steps for the user to accomplish to meet their goal.
- These steps can be, downloading a marketing brochure, watching a video, filling out a form, as well as reviewing governance regarding a certain action. The steps are only limited by the amount of, and proper use of content within a **Sub-Aggregate Page**.
- As you can imagine, since there can be multiple steps to accomplish a goal, multiple business units may have documentation, forms, governance, video, or whatever appropriate content tied to the same **Sub-Aggregate Page**.

How does a Sub-Aggregate Page affect content?

- If we return back to the Starbucks Environment page and click into areas within the Environment Aggregate Page, the user will be taken to either a **Sub Aggregate Page** or a “Topic” or “Details Page”.
 - Topic Pages will be covered within the next section
- In this case the user chose “Building Greener Stores” which lead them to a **Sub Aggregate Page**. This particular page speaks only to what Starbucks does to make their stores “Green”, which is a sub-set of “Environment”
 - <http://www.starbucks.com/responsibility/environment/green-building>

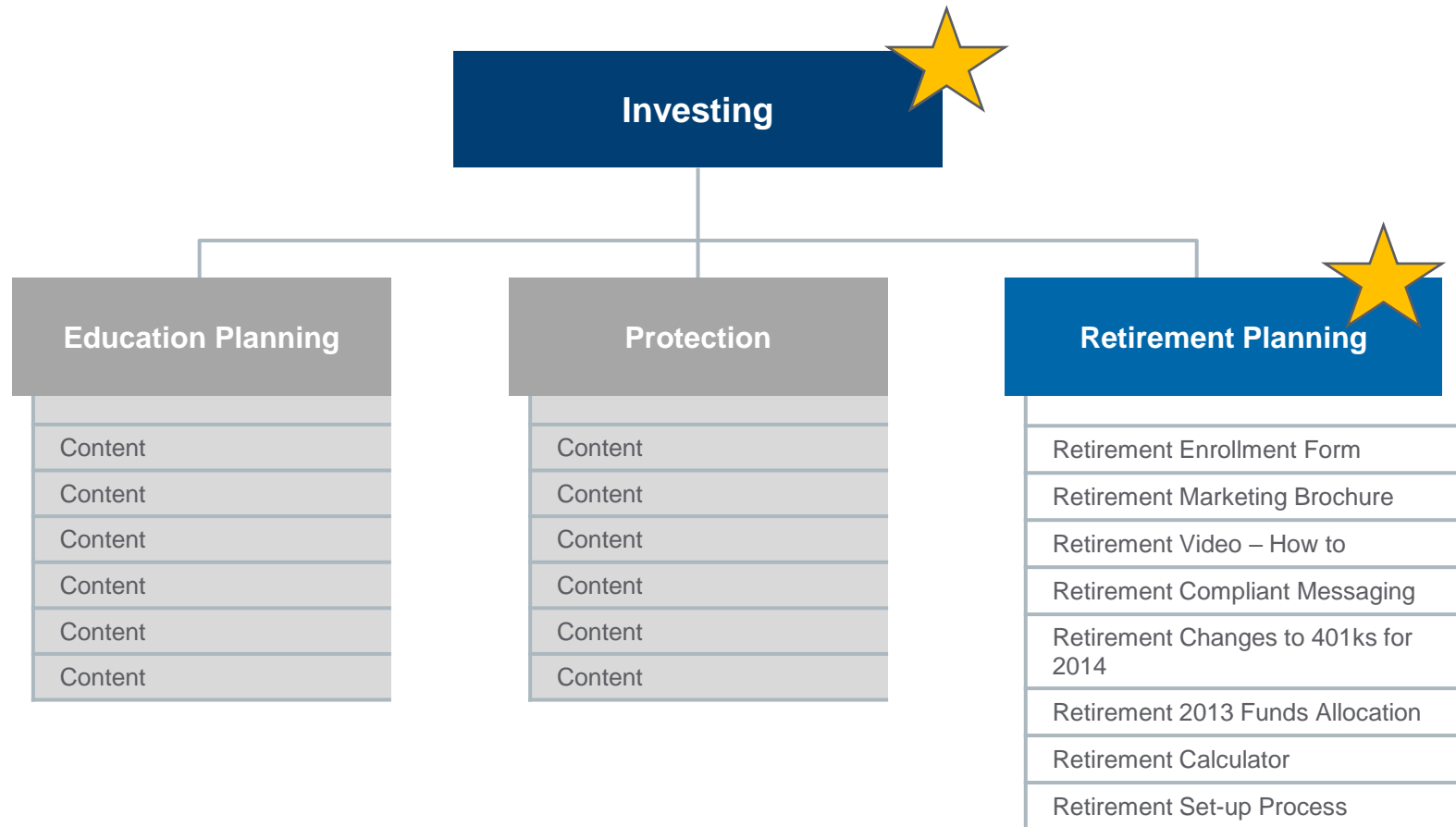


The screenshot displays the Starbucks website's "Building Greener Stores" page. The top navigation bar includes links for "Sign In", "Customer Service", "Find a Store", "Coffee", "Menu", "Coffeehouse", "Responsibility", "Card", and "Shop". The main heading is "Building Greener Stores". Below this is a large image of a Starbucks store interior. To the right, a sidebar lists environmental topics: "ENVIRONMENT", "Energy Conservation & Renewable Energy", "Water Conservation", "Recycling & Reducing Waste", "Cup and Materials", and "Climate Change". The main content area features a paragraph about Starbucks' comprehensive approach to reducing environmental impact, followed by a section titled "LEED® Certified Stores" with an image of a modern building. Below this is a section for "Energy Conservation & Renewable Energy" with an image of a light fixture. Further down, there are sections for "Water Conservation" (image of a water tap) and "Store Design" (image of a store interior). The page also includes a "How You Can Help" section and a "Starbucks Global Responsibility Goals & Progress" section.

How does a Sub-Aggregate Page affect content?

- If we return back to the LPL model question of “Investing”, and our user chooses “Retirement Planning”, they will then be lead to a **Sub Aggregate Page** that will display a number of appropriate pieces of content for the user to not only use, but also review just in case there is something within the list that they did not consider or that they didn’t know was available to them.
- There is no such thing as minimum or maximum content, only appropriate content.
- On the next page you will find a quick view example using the “Investing” question to lead to “Retirement Planning”.
- As an exercise, see how your content may be able to fit into this **Sub-Aggregate Page** (even if it’s not listed) as a way to showcase your business units contribution to this topic.

How does a Sub-Aggregate Page affect content?



*Writer of this document is not a content owner. Content lists are suggestions and may not reflect real use cases or scenarios.

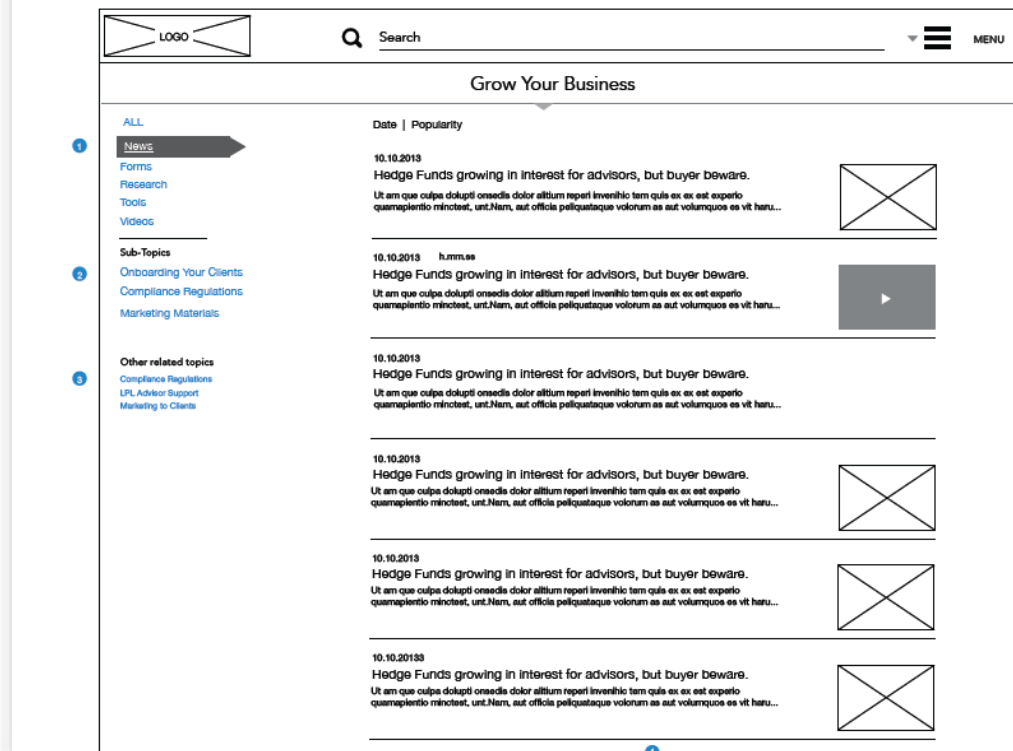
How does a Sub-Aggregate Page affect content?

- In the previous example, our user who was interested in Retirement Planning didn't realize that there would be changes to the 2014 plan. Because content was appropriately lumped into the **Sub-Aggregate Page** of Retirement Planning, our user can prepare for the upcoming year.
- The next example displays the wireframe for our new **Sub-Aggregate Page**.
- As an exercise, can you see how using the “Investing” and “Retirement Planning” model as displayed on the previous page could be laid out using this new structure? Is it apparent that multiple business units can take advantage of the **Aggregate** and **Sub-Aggregate Pages** as a way of “cross –selling” content?

How does a Sub-Aggregate Page affect content?

- This is an example of a Sub-Aggregate Page within the LPL new RC.
- As previously mentioned, can you see how using the “Investing” and “Retirement Planning” model could be laid out using this new structure?
- Is it apparent that multiple business units can take advantage of the **Aggregate** and **Sub-Aggregate Pages** as a way of “cross –selling” content?

3.4 Sub-Section Page



How does a Topic Page affect content?



How does a Topic Page affect content?

- While the Home Page, and Aggregate Pages can display a great number of options, choices, and steps, typically the **Topic Page** covers one main piece of content or content that would be considered contingent upon one another.
- The objective of a **Topic Page** is to be the final “answer to the question” or reason the user came to the site.
- **Topic Pages** can be any type of content; forms, video, marketing collateral, governance review, balance inquiry etc. Just remember to think on it as the “end-game” or the “final piece of data”.

How does a Topic Page affect content?

- In the case of Starbucks “Greener Stores” Sub-Aggregate Page, there is a link to “Leed Certified”. This link leads directly to a “Lead Certified” **Topic Page** which explains, in detail, what it is to be Leed Certified.
 - <http://www.starbucks.com/responsibility/environment/green-building/leed-certified-stores>
- In the case of the LPL model, a **Topic Page**, as stated, could be any type of content; forms, video, marketing collateral, governance review, balance inquiry etc

Starbucks

Sign In Customer Service Find a Store

Coffee Menu Coffeehouse Responsibility Card Shop

LEED® Certified Stores

Twitter 8.1k

ENVIRONMENT
Building Greener Stores
Store Design

Sustainable Store Design in Action

One of the best ways to reduce our impact on the planet is to design and build our stores in an environmentally responsible way. We do this by utilizing energy and water saving strategies and by choosing to use green building materials and construction methods.

We're implementing green building strategies in our stores, and it is our goal that all of our new company-owned stores are built to be able to be LEED® Certified. Utilizing this independent third party certification allows us to track our progress against industry-wide baselines and continue to reduce our overall environmental footprint.

LEED Certified Stores Goals and Progress

Goal: Build all new, company-owned stores to achieve LEED® certification.

Progress through 2012: We have achieved LEED certification for 55 stores in 12 countries and we are addressing specific geographic challenges in our high-growth markets.

Year	Percentage of new company-owned stores built to achieve LEED® certification
2011	75%
2012	69%

Percentage of new company-owned stores built to achieve LEED® certification.

To learn more about our work in LEED Certified stores read our [Global Responsibility Goals & Progress Report](#).

Starbucks has been a leader for more than a decade in the development and implementation of a scalable green building program for retail companies like ours.

We joined the U.S. Green Building Council (USGBC) in 2005 and collaborated with them to help develop the LEED® (Leadership in Energy and Environmental Design) for Retail rating system, an effort that incorporated retail business strategies into the LEED for New Construction and Commercial Interiors rating systems.

We opened our first LEED-certified store in 2006. In 2009, Starbucks became one of the first retailers to join

How does a Topic Page affect content?

- This **Topic Page** is a “Form View”. It’s content includes;
 - The form
 - Description of use
 - Related items (which could direct right back the appropriate Sub-Aggregate Page
 - Etc.
- Note that though this **Topic Page** would display “Forms” it could also have related links to other business units for additional content.

3.5 Detail Page / Forms + Documents

LOGO

Search

MENU

Aggregation Page | Sub-section Page 1

Form 2013-CV | Tax Deferral Form

Print Email Download

Description

Aquam, quibus es nimiribus nulpā qui audit, con possi officius, corectione, sequibust aborehe ntiunt odiae. Nonsed et autas eria est aut iliquas nullore laciatur, si blaborem faccus ipsunt pera quibus, voluptatem quiat.

PDF
13 Pages

Related

Compliance KYCs
IRAs
Marketing Materials

Related Resources

[Resource Name]
[Resource Name]
[Resource Name]

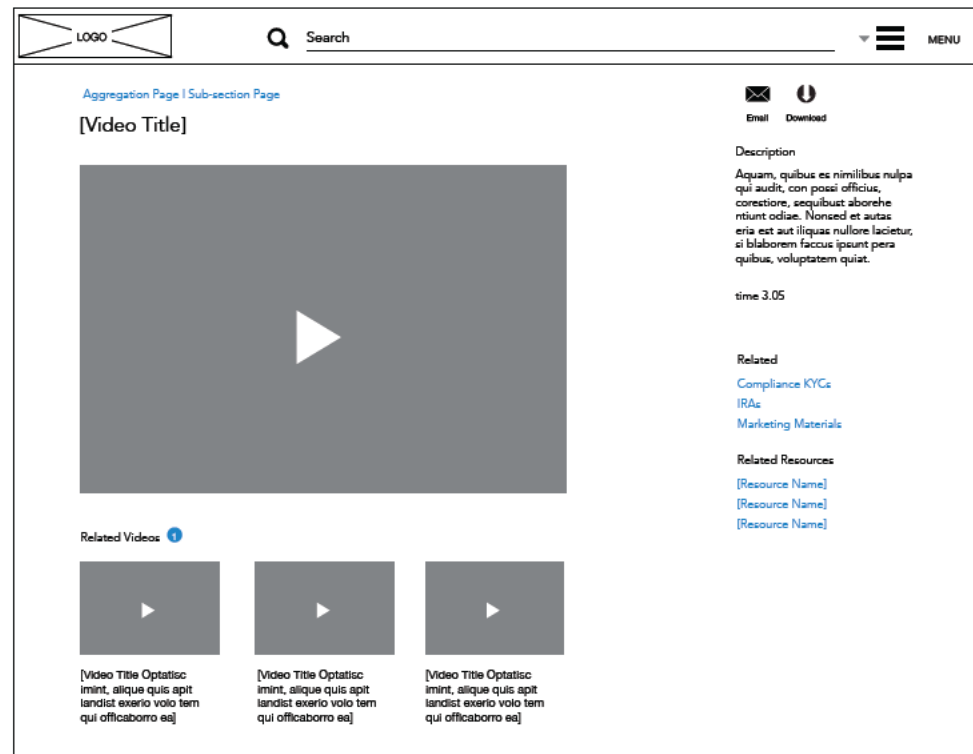
Embedded Form or Document

Page 1 of 18

How does a Topic Page affect content?

- This **Topic Page** is a “Video View”. It’s content includes;
 - A video (or several)
 - Description of use
 - Related items (which could direct right back the appropriate Sub-Aggregate Page
 - Etc.
- As noted, the **Topic Page** could also have related links to other business units for additional content.

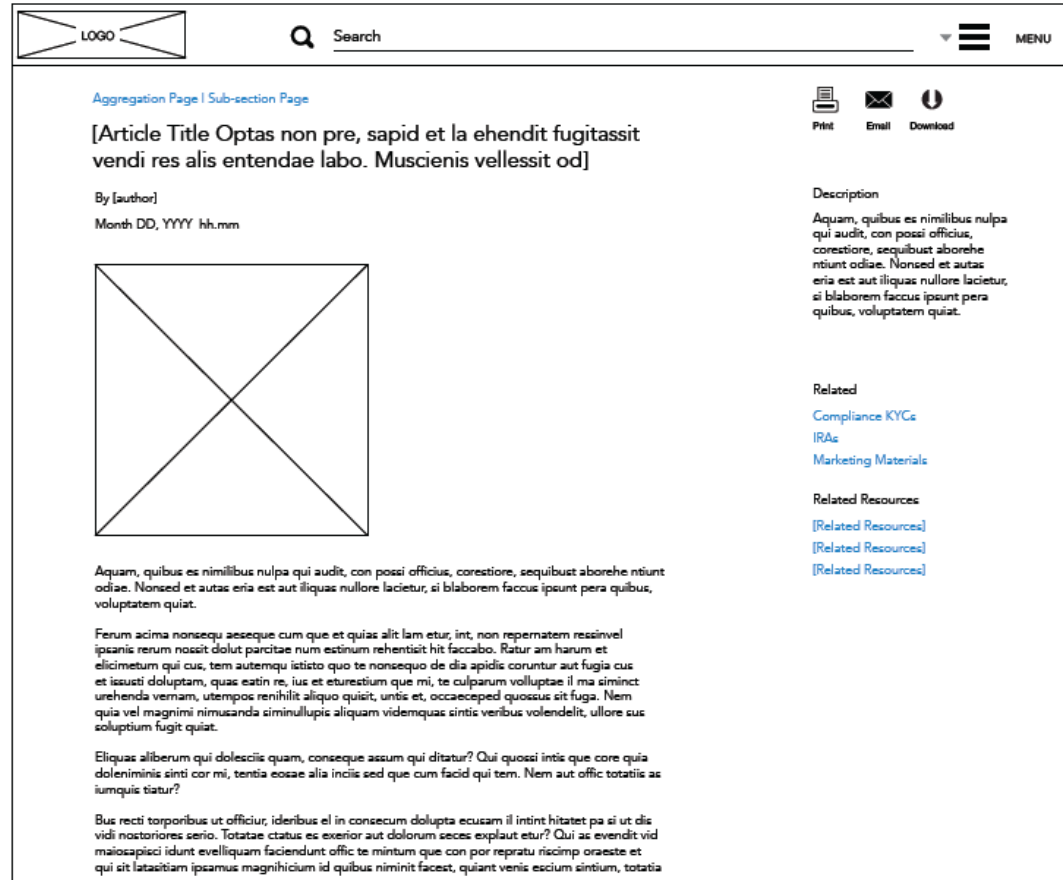
3.6 Detail Page / Video



How does a Topic Page affect content?

3.7 Detail Page / Article + News

- This **Topic Page** is an “Article View”. It’s content includes;
 - An article of some type
 - Description of use
 - Related items (which could direct right back the appropriate Sub-Aggregate Page
 - Etc.
- As noted, the **Topic Page** could also have related links to other business units for additional content.



How to understand Categorization and Tagging/Filtering (Taxonomy)

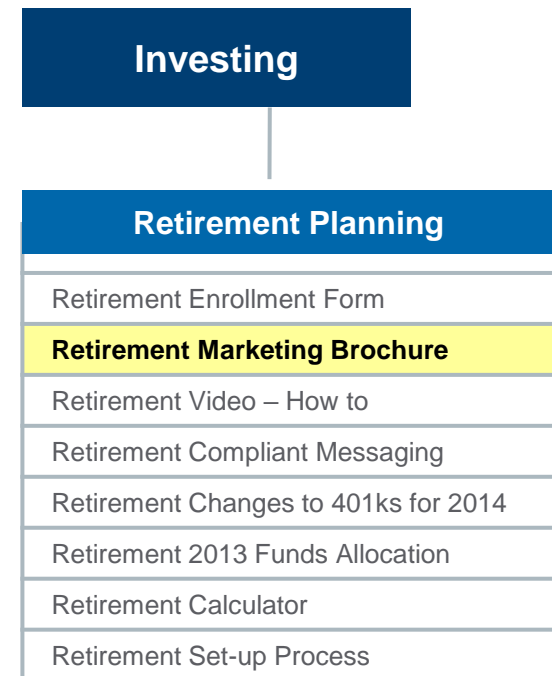


How to understand Categorization and Tagging/Filtering

- What is **Categorization**?
 - According to Wikipedia; **Categorization** is the process in which ideas and objects are recognized, differentiated, and understood. **Categorization** implies that objects are grouped into categories, usually for some specific purpose. Ideally, **a category illuminates a relationship between the subjects and objects of knowledge**. **Categorization** is fundamental in language, prediction, inference, decision making and in all kinds of environmental interaction.
- Why is **Categorization** important within the new RC?
 - When items on the RC, or any functioning CMS are appropriately categorized they can then be seen by the “**right people at the right time**”. This is an important mantra to remember when working with content and will be brought up again within this presentation.

How to understand Categorization and Tagging/Filtering

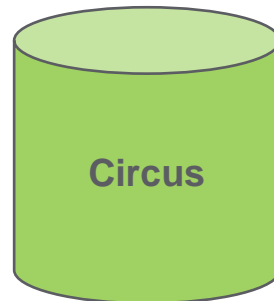
- Here is a quick-view sample of **Categorization** as it would be understood in the new RC
- If you recall our **Sub-Aggregate Page** model of “Investing” on page 21, this is a simple way of looking at **Categorization**.
 - For instance
 - > The “Retirement Marketing Brochure” falls under the “Retirement Planning” category which falls under the “Investing” category.



How to understand Categorization and Tagging/Filtering

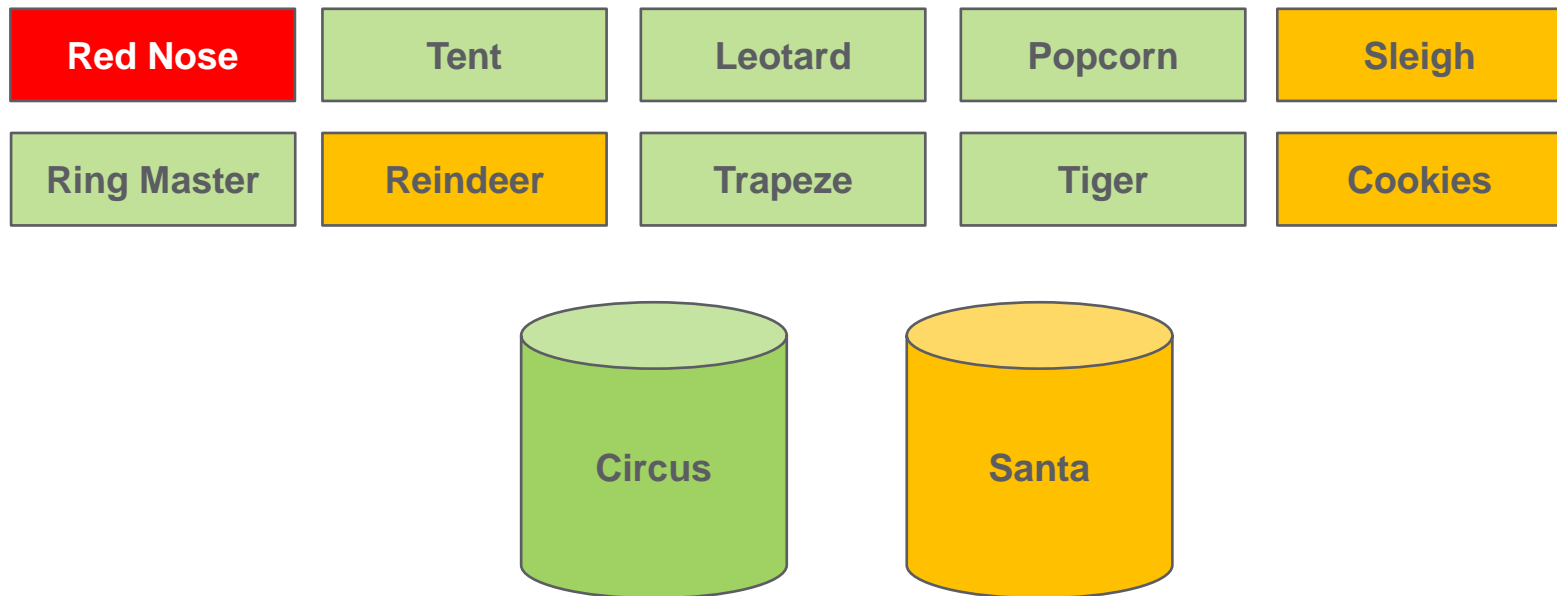
- Let's take a moment to have a quick exercise in **Categorization**.
- Below are 10 labels. Think about them as content (eg documents, videos, forms, etc.) and put them into the buckets below.

Red Nose	Tent	Leotard	Popcorn	Sleigh
Ring Master	Reindeer	Trapeze	Tiger	Cookies



How to understand Categorization and Tagging/Filtering

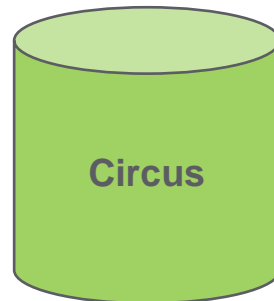
- Did you find the trick label?
- As you can see, the “red nose” would fit into both categories very well. This is the concept of **Categorization**.



How to understand Categorization and Tagging/Filtering

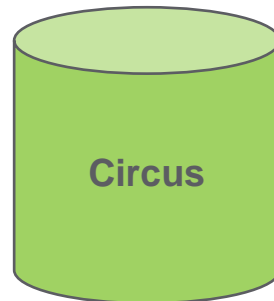
- For this exercise descriptive text has been added.
- Categorize these items at take note how descriptive text can drastically change where we want to categorize items.

Red Rubber Nose	Circus Tent	Pink Leotard	String of Popcorn	Flying Sleigh
Ring Master	Eight Reindeer	Flying Trapeze	Tiger Striped Stocking	Cookies sold at stand



How to understand Categorization and Tagging/Filtering

- This exercise promotes why Content Owners are so very important and how, with their unique insight, they can determine where their content will be most appropriate.
- This now leads to **Tagging** and/or **Filtering**



How to understand Categorization and Tagging/Filtering

- **Tagging** and **Filtering**, for the purposes of this document, are synonymous and interchangeable. The reason both are called out is because different groups may use each to define the same action.
- The action of **Tagging** and **Filtering** a piece of content allows the RC system to properly categorize an item so that **the right people** can find the content **at the right time**.
- Whenever you think about a specific piece of content ask yourself the following questions:
 - Who should see the content? (Advisor Groups, Brokers etc.)
 - How will my content be used? (A tool, a form, marketing, information)
 - What action will a user take to find my content? (Category or categories, naming convention)

How to understand Categorization and Tagging/Filtering

- The new RC will structure its categories based off of actions, goals, and sequence instead of division.
 - Note that these are examples only and subject to change. In addition they are *not* apples to apples comparisons by category

Old RC (Categories by division)

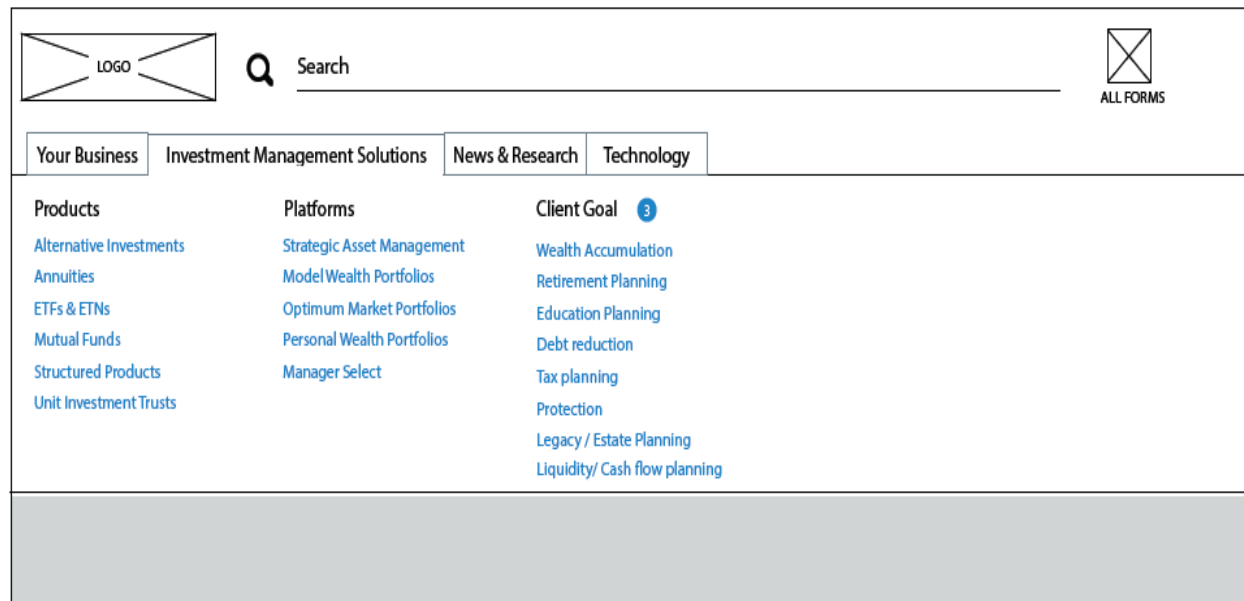
Research
Advisory Platforms
Investment Products
Planning and Services
Business Consulting
Operations
Forms

New RC (Categories by Goal)

Wealth Accumulation
Retirement Planning
Education Planning
Debt Reduction
Tax Planning
Protection
Legacy / Estate Planning

How to understand Categorization and Tagging/Filtering

- Here is an example wireframe of the new Top Navigation Mega Menu for review.
- Again, as the RC project evolves from February's Pilot to July's Launch, the Mega Menu will change. You, the Content Owner, will be involved throughout the process for appropriate **Tagging** and **Filtering**



How to understand Categorization and Tagging/Filtering

- In this exercise we will filter a fictitious piece of content.
- Content Description
 - I am a Marketing Brochure focusing on Wealth Management and should only be distributed to Advisor Type A & C.
- Choose the appropriate filters below that the brochure should be tagged to.

Who will see it?	Advisor A	Advisor B	Advisor C	Advisor D
How will it be used?	Marketing	Form	Article	Video
What is the Goal?	Management Select	Auditing	Support Services	Wealth Management

How to understand Categorization and Tagging/Filtering

- Content Description

- I am a Marketing Brochure focusing on Wealth Management and should only be distributed to Advisor Type A & C..

- Did you properly Tag / Filter the content?

Who will see it?	Advisor A	Advisor B	Advisor C	Advisor D
How will it be used?	Marketing	Form	Article	Video
What is the Goal?	Manager Select	Auditing	Support Services	Wealth Management

└ In Closing.....

- It is our sincere hope that this guide has assisted you with the following;
 - Understand how content affects Page Templates
 - How these Page Templates flow throughout the process of building a new Resource Center
 - How **Categorization** and appropriate **Tagging** / **Filtering** will allow the right people to find content at the right time

Next Steps

- Next Steps

- February Pilot

- > The Content Management Team will.....

- May Pilot and July Launch

- > Over the next few months, the Project Team will finalize Categorization needed for May and July's launch dates. When finalized, the Content Management Team will reach out to Content Owners to begin Tagging and Filtering content spreadsheets. If you have any questions, please do not hesitate to reach out.