

User Interviews

User and Task Analysis Summary for the Prudential Relocation Web Site Project

The following summaries are derived from the user stakeholder interviews with each respective user group at Prudential (Valhalla and Chicago), Nestle (Glendale), Shell (Houston), and J.P. Morgan (New York) in January 1999.

Prudential Relocation Users (list)

Relocation Managers (RM)
Relocation Associates (RA)
Property Specialists (PS)
Destination Specialists (DS)
Transportation Specialists (TS)

Relocation Client Users (list)

Transferees
New Hires
International Assignees
Pre-Decision Planners
Hiring Managers
Relocation Human Resources Staff Members

Other Users and Potential Future Users of the Prudential Relocation Web Site (list)

Account Executives (AE) - Prudential Relocation
Director of Operations (DO) - Prudential Relocation
Relocation Expense Analysts (REA) - Prudential Relocation
PREA Affiliates
Relocation Suppliers
The general public - anyone interested in relocation services or destination services

Prudential Relocation Users (detail)

Relocation Managers (RM)

Requisites:

Licensed in Real Estate

Background/Experience:

Real estate
Customer Service in real estate or retail
Some from banking
Many with no college coursework at all
Others with a wide range of college educational levels
Some with sales training
Many came from internal PR positions

Typical Skills and Characteristics:

- Good verbal communication
- Empathetic to transferee's needs
- High comfort level with computer systems
- Ability to coordinate a team of specialists
- Handle high levels of stress and urgency
- Good prioritization of tasks
- Time management
- Exercise lots of patience and tolerance

Other:

- Almost exclusively women
- High attrition rate due to burn out and low pay scales
- Some desire to move on to the Director of Operations position
- High work-load (e.g., not unusual to handle 30-40 transferees at various points in the relocation process)

Current Frustrations with the Process:

- The messengers of 'bad' news
- Full accountability for all that happens
- Often blamed for all problems
- High case loads
- Get tired of the same old thing
- Must collect every piece of information
- Must 'mother' the transferees and relocation team
- Caught in the middle between the transferee and the corporate pressure
- Often inadequate roles and responsibilities definition
- Large redundancy in client relations - the transferee and the spouse don't read the materials because it seems overwhelming
- Some types of transferees are very frustrating to handle (e.g., engineers, scientists, etc.)
- Many different types of transferees to handle
- Because transferees are very busy they don't follow directions well, and they are unsure of what to do next
- Transferees don't understand the forms
- Old procedures to fill, move, or transfer files to associate's in-baskets
- Lots of paper
- Redundant data stores and inputs into systems
- Large paper trail to cover your 'butt' with legal documents

Primary Tasks:

- Initiations
- Conduct Needs Assessments
 - Destination
 - Property
 - Transportation
- Equity Loans
- Communicate Policy
- Communicate Appraised Values
- Tracking Timed Processes (Status)
- Other
 - Mortgage Calculations
 - Destination Services
 - Survey customer satisfaction

Relocation Associates (RA)

Requisites:

None - it's an entry level position

Background/Experience:

Wide range of college educational levels - many with no college coursework

Very little formal or informal training - learn as you go

Some with data processing experience

Typical Skills and Characteristics:

Strong willingness to learn about the corporate relocation process

Broad experience in relocation in a very short timeframe

Demands good organizational skills and prioritization of tasks

Handle high levels of stress and urgency

Other:

Wide range of ages, but mostly above 30

High attrition rate

Go through many career shifts

Mostly women

Seen as the "glue" that helps put and hold everything together in the process

Non-exempt job status

Entry level

Primary Tasks:

Assist the relocation team in their tasks, especially the RM and PS

Property Specialists (PS)

Requisites:

Licensed in Real Estate

Background/Experience:

Real estate experience

Some have been realtors

Familiarity with contracts and mortgages

Some have experience with home appraisals

Typical Skills and Characteristics:

Detailed oriented

Able to be assertive with people in the process

Must be quick to change

Flexibility

Other:

Most are in the age range of 40s or 50s

Mostly women but less so than other associates except transportation

Less attrition than other specialists

Primary Tasks:

Marketing of current home for transferee

Set up appraisals and inspections

Inventory of homes

Report on various aspects of home sale

Destination Specialists (DS)

Requisites:

Licensed in Real Estate

Background/Experience:

Real estate

Usually promoted up from a Relocation Associate (RA) or Marketing

Assistance/Destination Specialist (MA/DS) position (MA/DS was a position prior to the

Business Process Redesign that was implemented in August 1998)

Some college education or college graduates

Some without any college experience

Multi-disciplined

Typical Skills and Characteristics:

Handle pressure well

High task prioritization

Good verbal communication with other PR internal specialist and external client and
supplier contacts

Must firmly and tactfully communicate with the Relocation Managers

Persistence with obtaining information for sources

High comfort level with computer systems

Good follow-up skills

Good negotiation skills

Other:

Almost exclusively women

Primary Tasks:

Place property referrals

Follow up with brokers

Transportation Specialists (TS)

Requisites:

None

Background/Experience:

Many have had work experience with moving suppliers

Knowledgeable about van line procedures

Some college education or college graduates

Typical Skills and Characteristics:

Good negotiators

Ability to manage and coordinate suppliers

High comfort level with computer systems

Other:

More commonly in the age range of 25 - 35

Many move on to real estate, program management or international relocation

Position is more evenly split between men and women than the other specialist positions,
40% and 60%, respectively
Non-exempt job status

Primary Tasks:

Arrange van line service for total move of household goods
Coordinate and communicate with van lines
Arrange third-party insurance
Educate the RM on transportation

Relocation Client Users

Transferees

Profile:

Access via the Web is often at home
Most are relocating executives or professionals (i.e., very valuable employees)
There is usually a spouse highly involved in the moved
Research and planning is usually don 'after hours'
Children are usually very interested in learning about the new destination
Currently men make up approximately 80% of all transferees
Trend is moving to more women relocating than ever before
Many transferees are single-parents with children
Dependent (adult) care requests are increasing
Senior-level position employees do not have spouse job-assistance needs
Middle-level position employees are likely to need job-assistance for spouses
Many are in need of logistical help (e.g., banking, insurance, etc.)
Transferees feel very rushed in their jobs and transferring adds to this feeling
Not likely to be afraid to try new things (checklist/timelines all important)

New Hires

Profile:

Non-employees that need additional information on destinations or the potential
relocation process
Approach is geared toward winning the New Hire over to the client company with the
services provided for their move and information on the new location
Very much like a Pre-decision Planner, but not an employee of the client company

International Assignees

Profile:

Similar profile as that of the Transferee listed above, difference is that they are being
assigned outside of their current country of residence for an extend period of time.

Pre-Decision Planners

Profile:

Employee of the client company

Considering a move within the company either in the United States or abroad

Hiring Managers

Profile:

Relocation Human Resources Staff Members

Profile:

Various types of Client Contacts

1. Dedicated Relocation person – rare, only very large companies like Merck have these positions
2. Senior Human Resources person – smaller part of their overall job deals with relocation
3. Purchasing, Billing, Temp, or Admin person – conduct relocation functions in addition to one of the titles listed

PR is sometimes in contact with other people at the client location (e.g., Accounts Payable, Payroll, or general Human Resources personnel)

Other Users and Potential Future Users of the Prudential Relocation Website (list)

Account Executives (AE)

Tasks:

- Team identification
- Introductions with the client
- Handle loose ends on the contract
- Verify any verbal agreements
- Identify services with staffing model
- Customize brochures
- Customize forms with client
- Identification of policy needs with the client
- Drive Process Mapping approach with client (i.e., what do they do today and where are they going)
- Billing issues for the Transition Plan with the client
- Formulate the Partner Development Strategy online
- Handle unique processes with a particular client
- Reporting needs around specific time parameters, goals and objectives
- Work on cultural issues with the Director of Operations

Director of Operations (DO)

Tasks:

- Assignment of relocation team members for a relocation
- Management of relocation teams

Relocation Expense Analysts (REA)

REA recently became a new sub-field of corporate relocation in the last few years. The position was created out of the transition to total outsourcing of relocation services to relocation companies.

Background/Experience:

Usually college educated with coursework in accounting and/or finance
Many come straight out of college

Typical Skills and Characteristics:

High comfort level with computer systems

Other:

Mostly in the 30s age range
Considerable attrition - considered as a stepping stone position to other accounting jobs
Many desire to become team leaders or managers

Primary Tasks:

Feedback on what the Web Site should contain from Relocating Individuals

Transferees:

relocation policy online
listing of preferred lenders
paperwork on scheduling/confirming moving events all online
spousal career assistance information
eliminate as many paper forms as possible
downloading option for forms requiring signatures
issue a power of attorney for forms requiring signature so they can submit all forms online
community referrals: listing of preferred providers of services - doctors, dentists, day care, pet services, etc.
filters or easy to search criteria for services by zip codes
special request information - e.g., pets, personal collections/effects
find web sites for high schools or other schools
intl - more info on how to communicate with other ex-pats at the destination
intl - more info on what the non-working spouse can do at the destination
interface to web site that low comfort level users would feel comfortable using - they often handle the move
info on how to find temporary living accommodations
help on finding specific agents in the area
network/bulletin of testimonials of others who have relocated to the same area
chat type utility of currently relocating employees
tools: cost-of-living or salary calculators
online email addresses of RM/RC for additional means of contact
automate the address change notification to the USPS
24 by 7 access to resources

health care info
child care info
info on property values as it relates to school ratings
crime statistics
ability to rate or give feedback on vendors online
chamber of commerce info
minorities special interest needs
access to the DO - "the RM's boss"
program benefits online
to purchase a house online
relocation estimate calculator
market analysis info or specific areas
local landmarks mapped out
elderly care/homes
average price per square foot values of specific areas
traffic info for commuting
search policies by keywords or terms or headings
links to local universities and their programs

New Hires:

cost of housing information
sources for temporary housing
school report cards online
child discussion forums/bulletin boards/chat rooms
extracurricular programs for children
mortgage calculator
broker/agent contact with the MLS listing prices (comfort level issues of affordability)
Rolodex or notes area for conversations, reminders, etc.
common area online for notes from RM
do not require all phases of process to be done online - transferees may be offline for extended periods
links to rental properties
office locations

International Assignees:

looking to increase comfort level about the assignment
architecture of homes, furnishings or not,
tax law information and forms, rules and tips, recommendations, etc.
source of intl schools
transportation tips of the destination
customs information, tips, advice, rules, laws, duties, etc. for outbound and return
maps online
schools in relation to office location
tips, laws, rules around buying/selling autos
driver's license information (AAA has a downloadable form)
auto insurance rules and advice

visa information
how to set up utilities
what to expect about the destination - e.g., customs, rules, laws, mores, etc.
home owners/renters insurance at home and abroad
advice on setting up a will prior to leaving
temporary housing on the return
(health issues, inoculations, advisories)
area for assignees to post their lessons learned
ways to get assistance in exercising claims against the movers
online expense filing
information on banking services
online mentor system for relocating or assignment
links to social clubs for expatriates and families
information on cable TV programs, online games, etc.
info on what to bring in clothing and size differences
buddy network for kids at the destination

Information Architecture of the Prudential Relocation Center

Recommended Content by Topic Area

General or uncategorized

Ability to rate or give feedback on vendors online, and share it
Tool to notification the USPS of address changes
Minority special interest needs
Relocation cost calculator (estimate of cost)
Notes area for conversations, reminders, etc.
Common area online for notes from RM
Rolodex of names, number, addresses, etc for anyone in the relocation process or supplier
Glossary of terms for relocation

Forums, Bulletin Boards, or Chat Rooms

Online mentor system for relocating or assignment
Forum type utility of currently relocating employees
Child discussion forums/bulletin boards/chat rooms
Buddy network for kids at the destination

Relocation Team Contact Information

Online email addresses of RM/RC for additional means of contact
Access to the DO - "the RM's boss"

Initiation

Forms online (e.g., initiation referral, needs assessments - general, transportation, destination, and property)

Policy

Personal policy online
Detailed program benefits online
Search policies by keywords or terms or headings

Home Sale

Forms online
Market analysis info for specific areas
Average price per square foot values of specific areas
Broker Market Analysis report
Inspection report
Title search results (for PRERS eyes-only)
Appraisal report
Status of activities

Moving Household Goods

Ways to get assistance in exercising claims against the movers
Special request information - e.g., pets, personal collections/effects

Destination Services:

Home Purchasing

MLS listings
Corporate Inventoried Homes
Mortgage calculator
Listing of preferred mortgage lenders
Forms online
Help on finding specific agents in the area
Broker/agent contact with the MLS listing prices (comfort level issues of affordability)
Ability to purchase a house online
Cost of housing information
Property tax rates for specific areas
Status of activities

Information about a destination

Spousal career assistance information
Listing of preferred providers of services - doctors, dentists, day care, elderly care, pet services, etc.
Search criteria for services by zip codes
Web sites for high schools or other schools
Info on how to find temporary living accommodations
Links to rental properties
Network/bulletin of testimonials of others who have relocated to the same area
Cost-of-living or salary calculators
Crime statistics
Info on property values as it relates to school ratings
School report cards online
Chamber of commerce info
Local landmarks mapped out
Market analysis info for specific areas
Average price per square foot values of specific areas
Traffic info for commuting
Links to local universities and their programs
Cost of housing information
Sources for temporary housing
Extracurricular programs for children
Office locations
Maps online

Schools in relation to office location
Information on banking services

International items specifically

Source of Intl schools

Transportation tips at the destination; car or no car, train, subway, etc.

Intl driver's license information (AAA has a downloadable form)

Intl auto insurance rules and advice

Visa information

How to set up utilities - location specific

What to expect about the destination - e.g., customs, rules, laws, mores, schools, shopping, food, etc.

Info on health issues, inoculations, advisories

Local information on cable TV programs, online games, etc.

Info on what to bring in clothing and size differences

Expense Reporting

Forms online

Status of expense report submission

Reports

Standard client reports online

Customized reports

Report query tool

Status

Combination timeline/status indicator/check list for activities and tasks

International (other than destination information)

Info on how to communicate with other ex-pats at the destination

Info on what the non-working spouse can do at the destination

Tax law information and forms, rules and tips, recommendations, etc.

Differences in architecture of homes, furnishings or not

Customs information, tips, advice, rules, laws, duties, etc. for outbound and return

Tips, laws, rules around buying/selling autos

Home owners/renters insurance at home and abroad

Advice on setting up a will prior to leaving

Temporary housing on the return

Area for assignees to post their lessons learned

Links to social clubs for expatriates and families

Time zone indicator

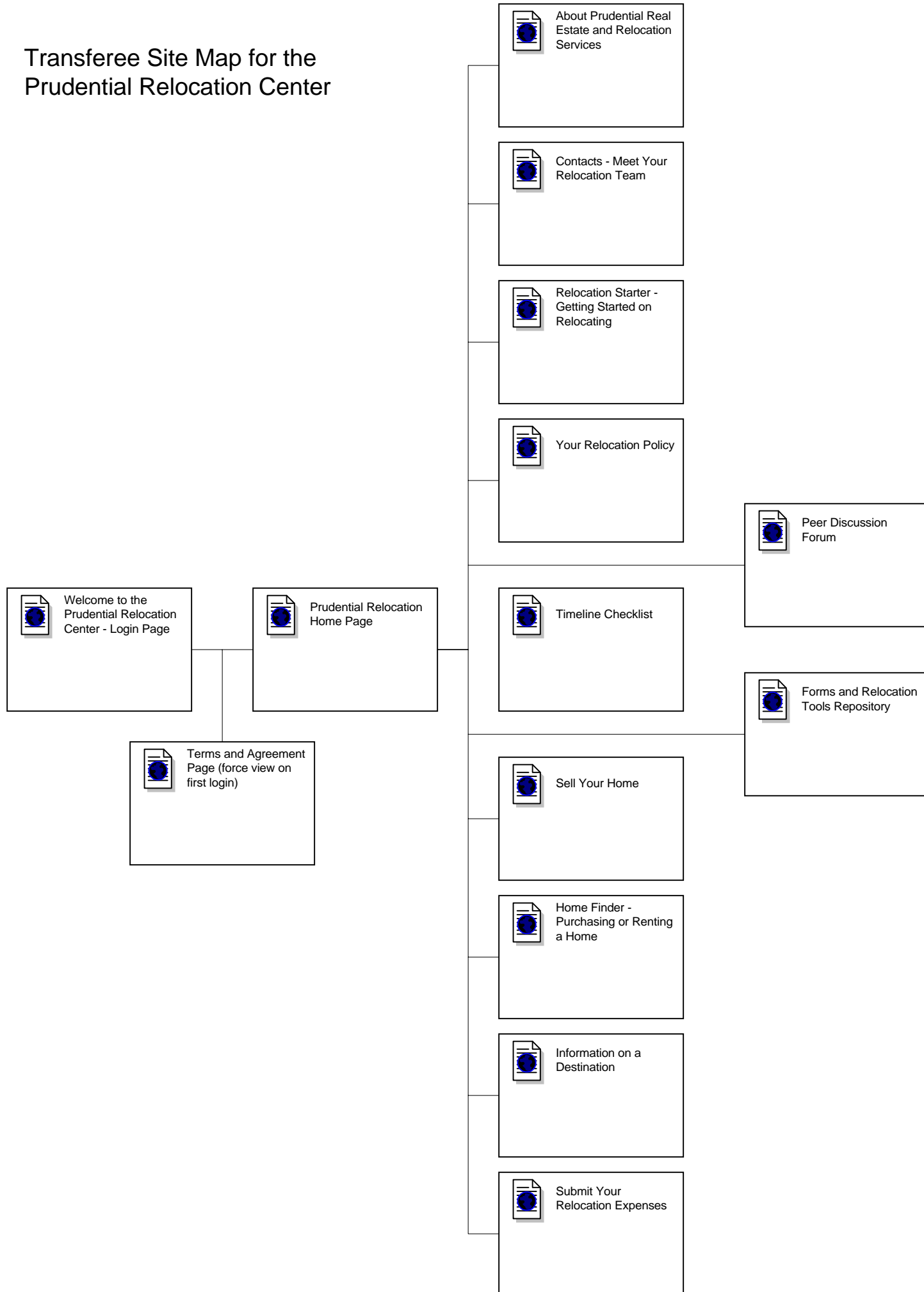
Info or coursework on inter-cultural training

Language training - maybe at least translation dictionaries

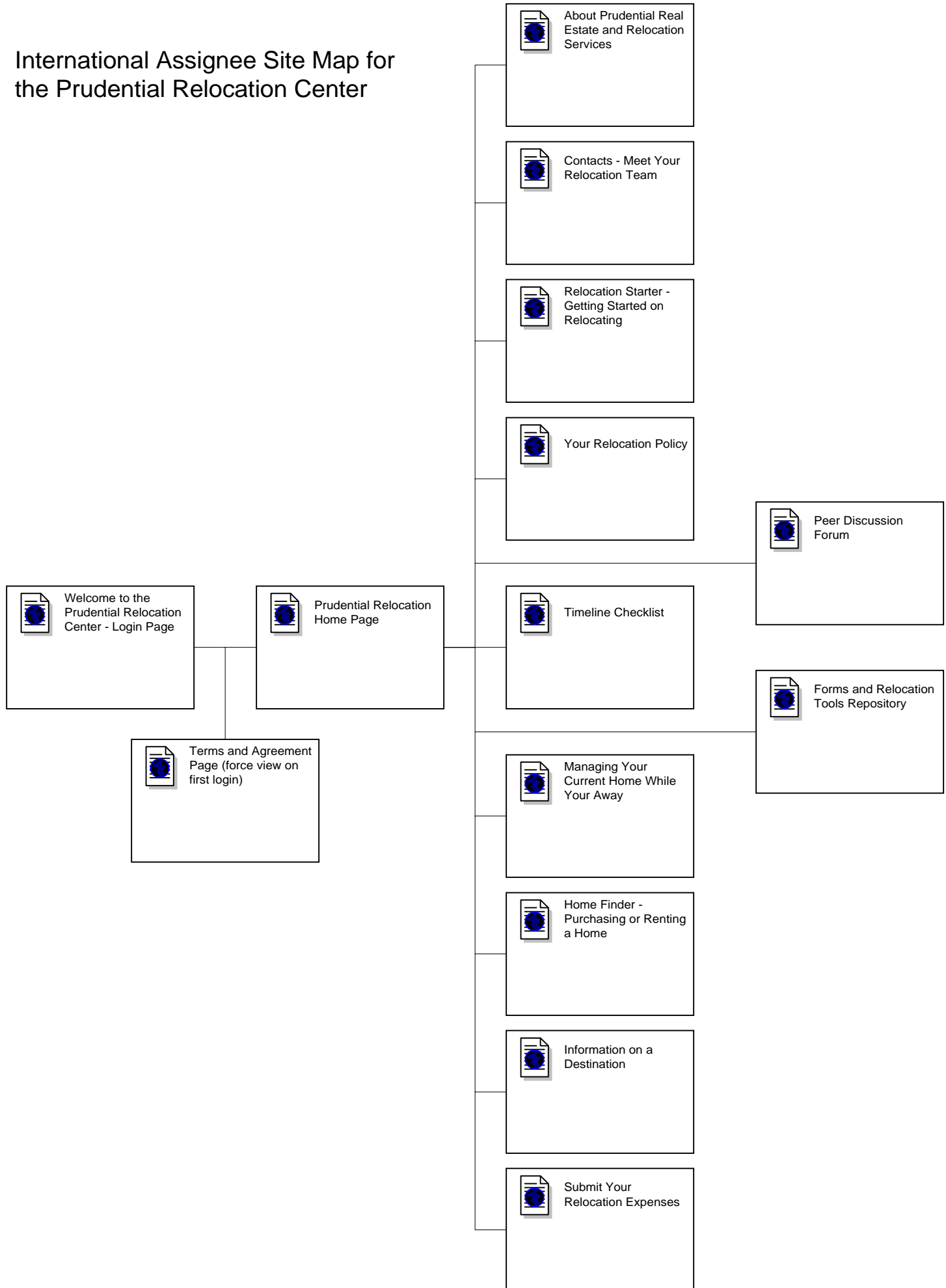
Info on repatriation

Site Maps for Each User Type

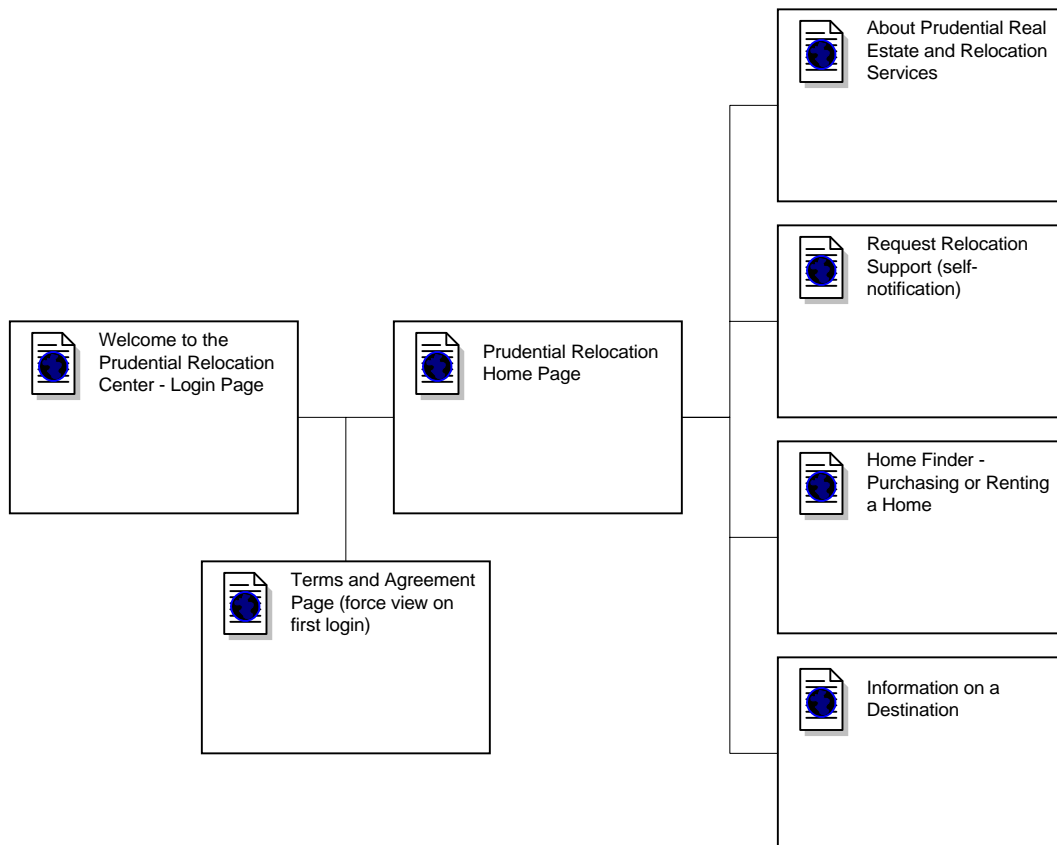
Transferee Site Map for the Prudential Relocation Center



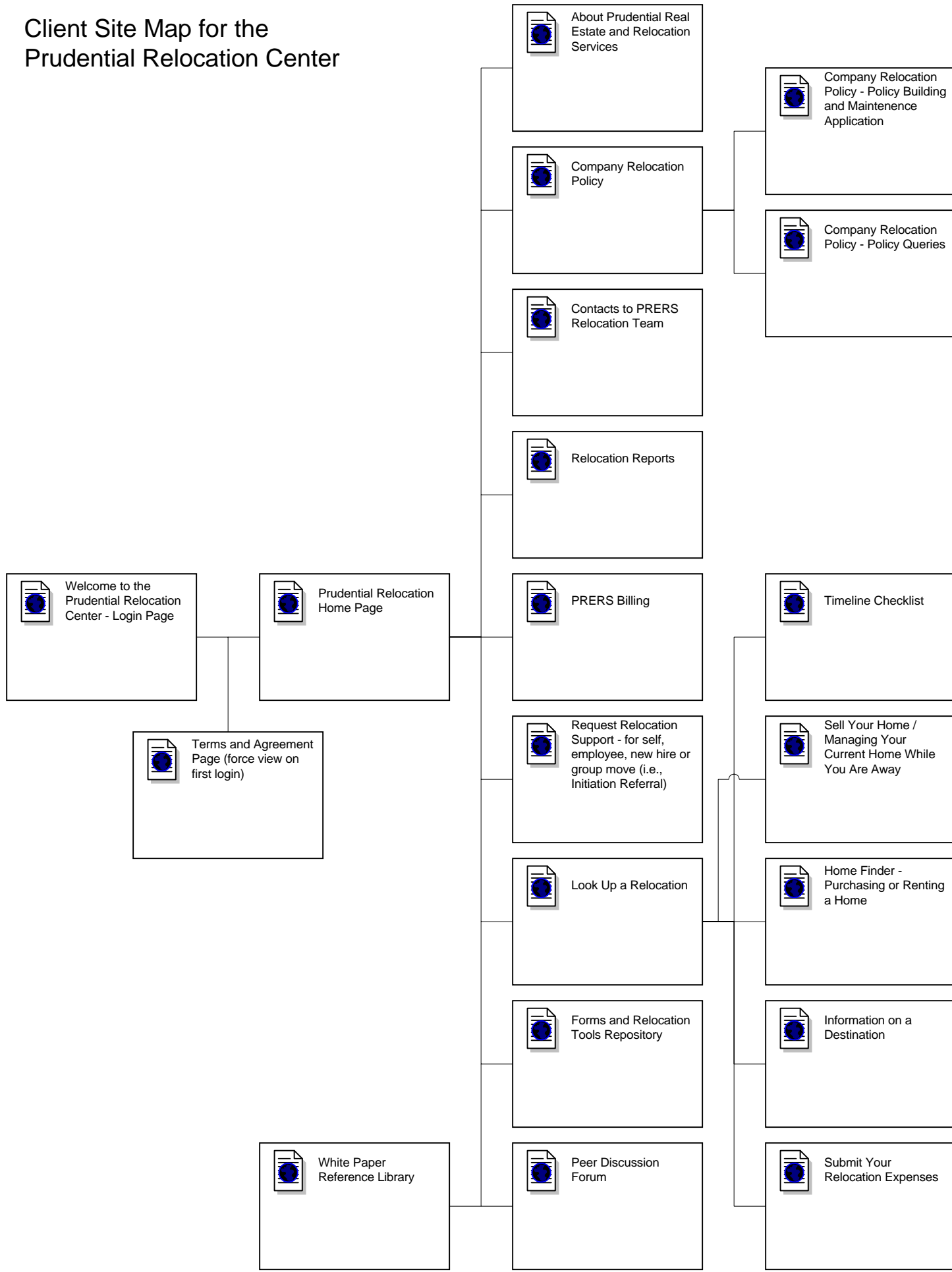
International Assignee Site Map for the Prudential Relocation Center



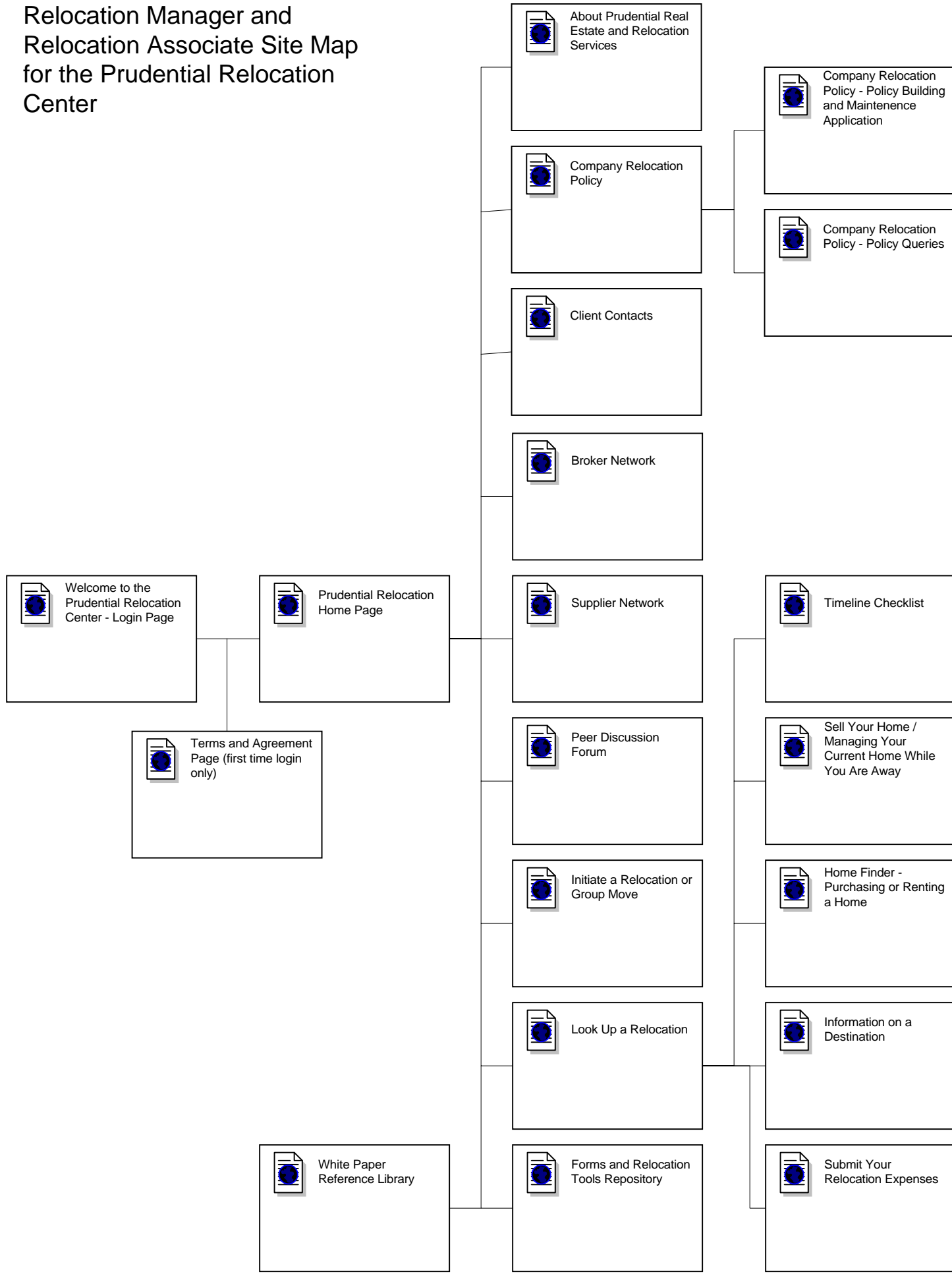
Pre-Decision Planner or New Hire Site Map for the Prudential Relocation Center



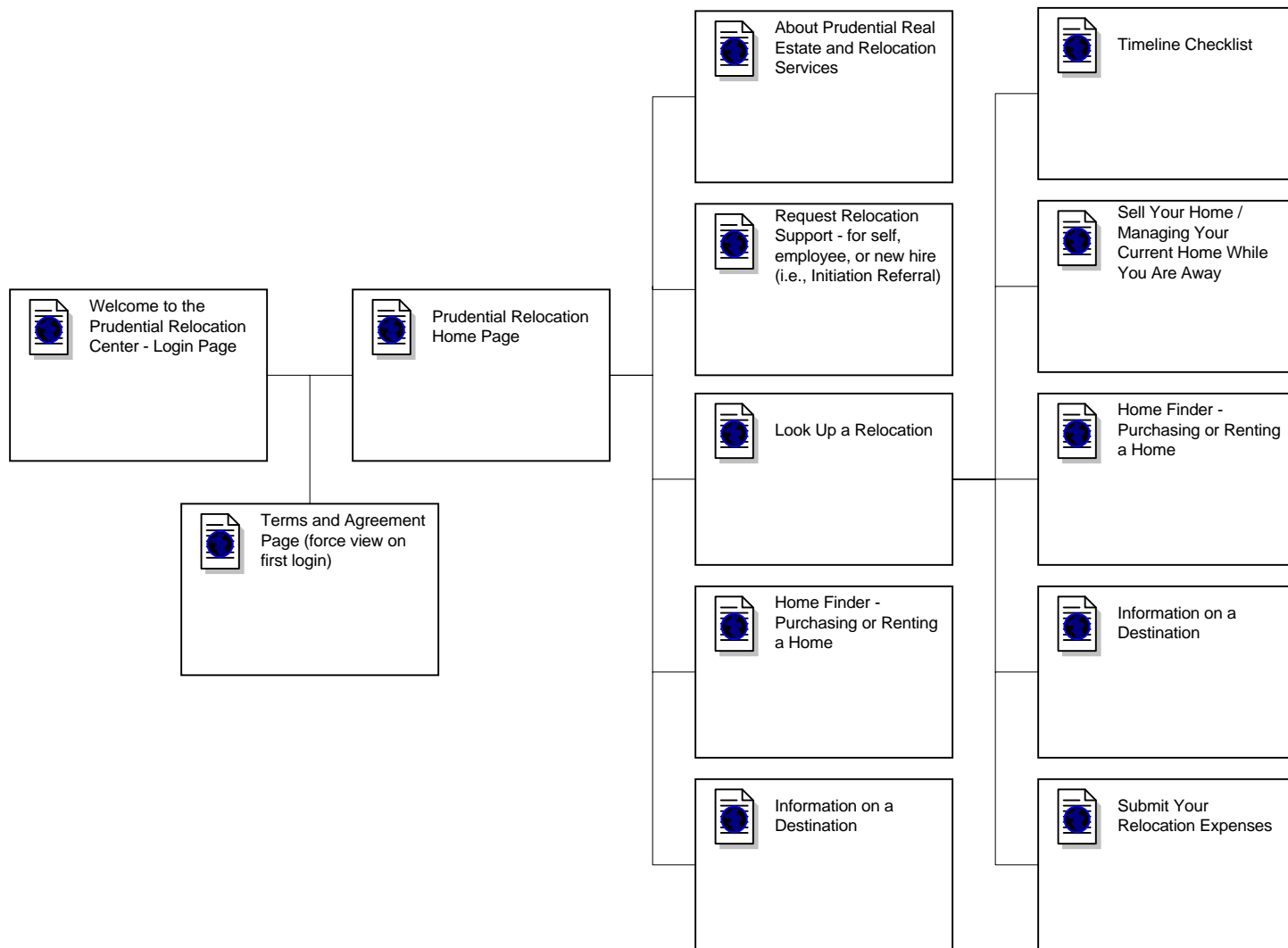
Client Site Map for the Prudential Relocation Center



Relocation Manager and Relocation Associate Site Map for the Prudential Relocation Center



Hiring Manager Site Map for the Prudential Relocation Center



Overall Architecture and Design Plan

c2o employs a user-centered design process that incorporates the principles of information architecture and human-computer interaction. c2o's approach enables a compelling design for the Prudential Relocation Center Web Site that communicates the messaging in a meaningful and memorable way. User-centered design ensures an intuitive navigational structure that makes the Prudential Relocation Center Web Site easy for customers to use and understand. The Prudential Relocation Center Web Site must encompass much more than visual design and appealing graphics for the site to be successful. Although we understand how important the aesthetics of the Prudential Relocation Center Web Site are, we also know that it must *work*. That's why our Architecture development process integrates a broad spectrum of design knowledge and expertise -- content development, information design, usability testing and visual design -- to create a compelling and intuitive online Prudential Relocation Center Web Site experience.

Content Development & Information Architecture

Following the online business strategy process, c2o design and technology strategists will need to collaborate with Prudential Relocation to design the Prudential Relocation Center Web Site information structure. We will begin with the collection of existing information on product categories, product descriptions, and product photography as well as any development of original content. Then we will move on to organize and categorize this content into a cohesive information structure. We focus on the levels and types of interactivity and information needed to achieve the target audiences' desired experiences. Finally, we will integrate navigational pathways into this content to create a working prototype or "wireframe". A preliminary high-level site architecture can be seen in the following illustration:

Usability Testing

c2o's user-centered approach to designing the Prudential Relocation Center Web Site means that the targeted user is an integral part of the design and evaluation of the site long before it is ever put into production. Throughout the development process, c2o will obtain user feedback at critical points through a series of evaluations conducted in the c2o Usability Lab. The first evaluation will be a usability test of the information architecture (IA) wireframe, a skeletal version of the Prudential Relocation Center Web Site presence that conveys the site's content structure and navigation without detailed visual design and content. Since all of the site's graphic design, features, and functionality rely on the information architecture represented by the wireframe, usability testing ensures that the proposed content organization and navigation are sound. Through iterative usability testing, c2o can modify the design, if necessary, until we are comfortable that the wireframe meets the established user's expectations.

Visual Design

Once the wireframe is approved, c2o will develop the initial visual sketches based on the mental models created within this strategy document and the aforementioned wireframe. In the iterative design process, these sketches will evolve to fully rendered color comps. It is here where we will blend form with function - a great looking Prudential Relocation Center Web Site that will also work. And since creating order from chaos acknowledges that there are many creative paths to a successful online presence, we will offer Sony three graphic choices throughout the visual design process until a final visual style is selected.