Information Architecture
Designed for the User

Presented by:

Lance Love
User Experience Architect
P – 212-991-4002
M – 646-753-4001

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The site's user-centric approach is predicated on the developed user personas

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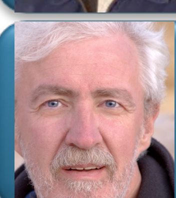
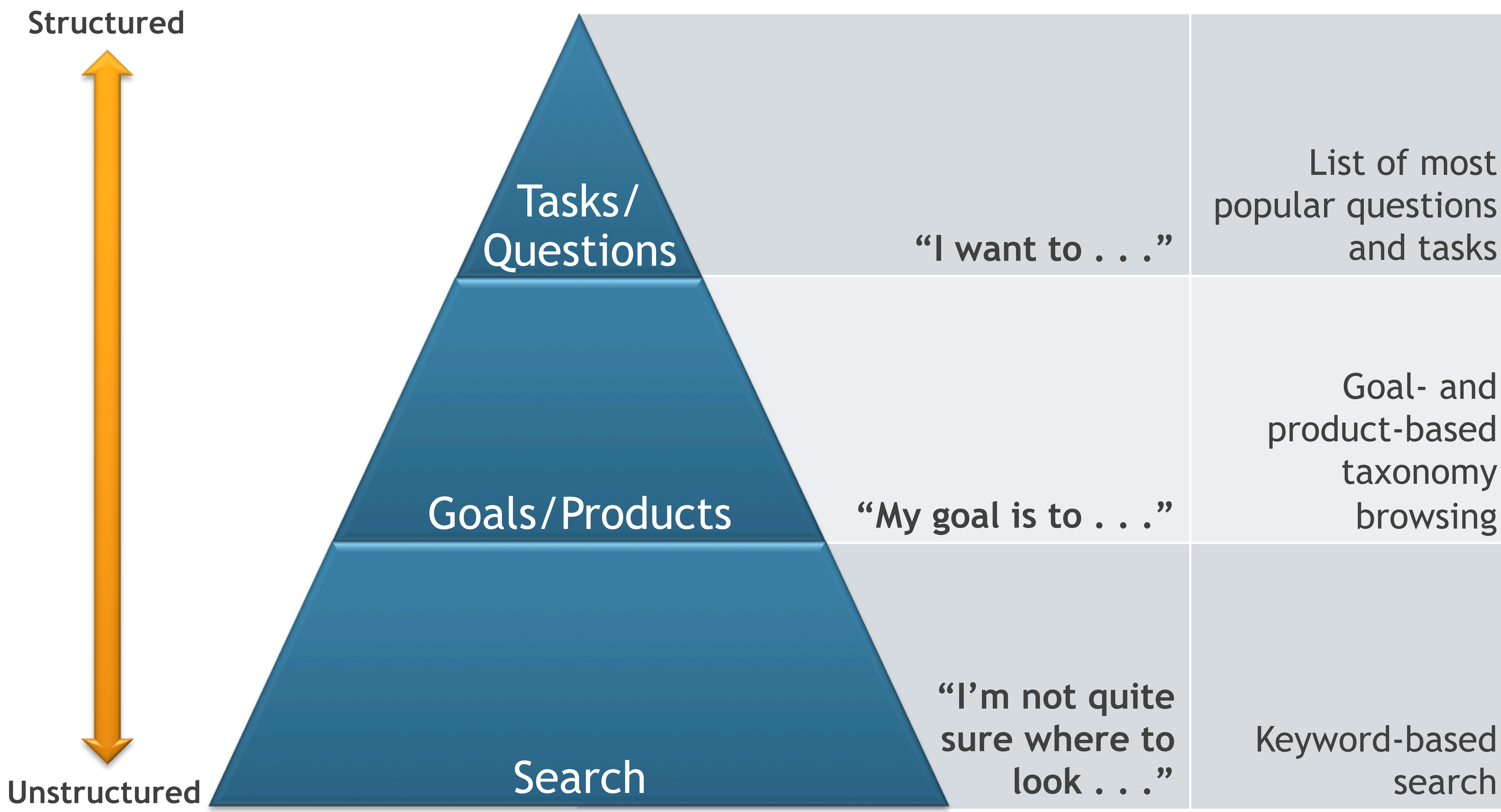
	PERSONAS	REPRESENTATIVE NEED
	INDEPENDENT IDEALIST	• Plain-English financial information and help planning her future
	PRE-PLANNING PROSPECTIVE	• Quick access to relevant products and services
	FINANCIALLY CURIOUS GEN-XER	• Tools and information to help her with planning
	MANAGING TRANSITIONS	• Information about maximizing assets in the short-term without compromising the long-term
	RUSHING TOWARD RETIREMENT	• Education to enter into a meaningful dialogue with his financial advisor
	TENTATIVELY RETIRING	• The same access to financial advice as those in a higher income bracket
	RETIRED RESPITE	• Help in determining if he should restructure his assets and advice about planning for his heirs

The site will provide multiple paths to tools and content based on users' specific needs



Revised information architecture addresses the habits and needs of the identified personas

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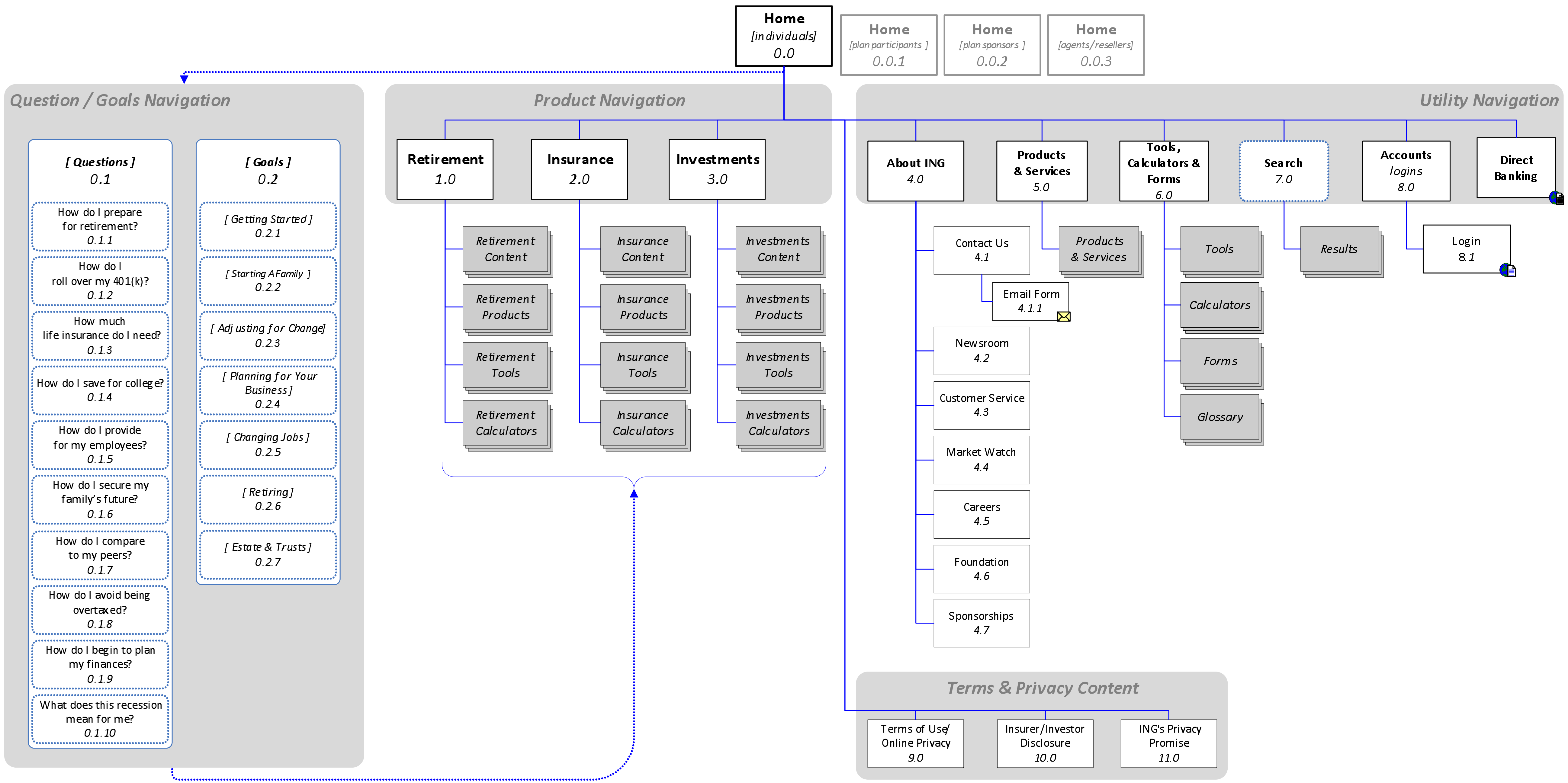
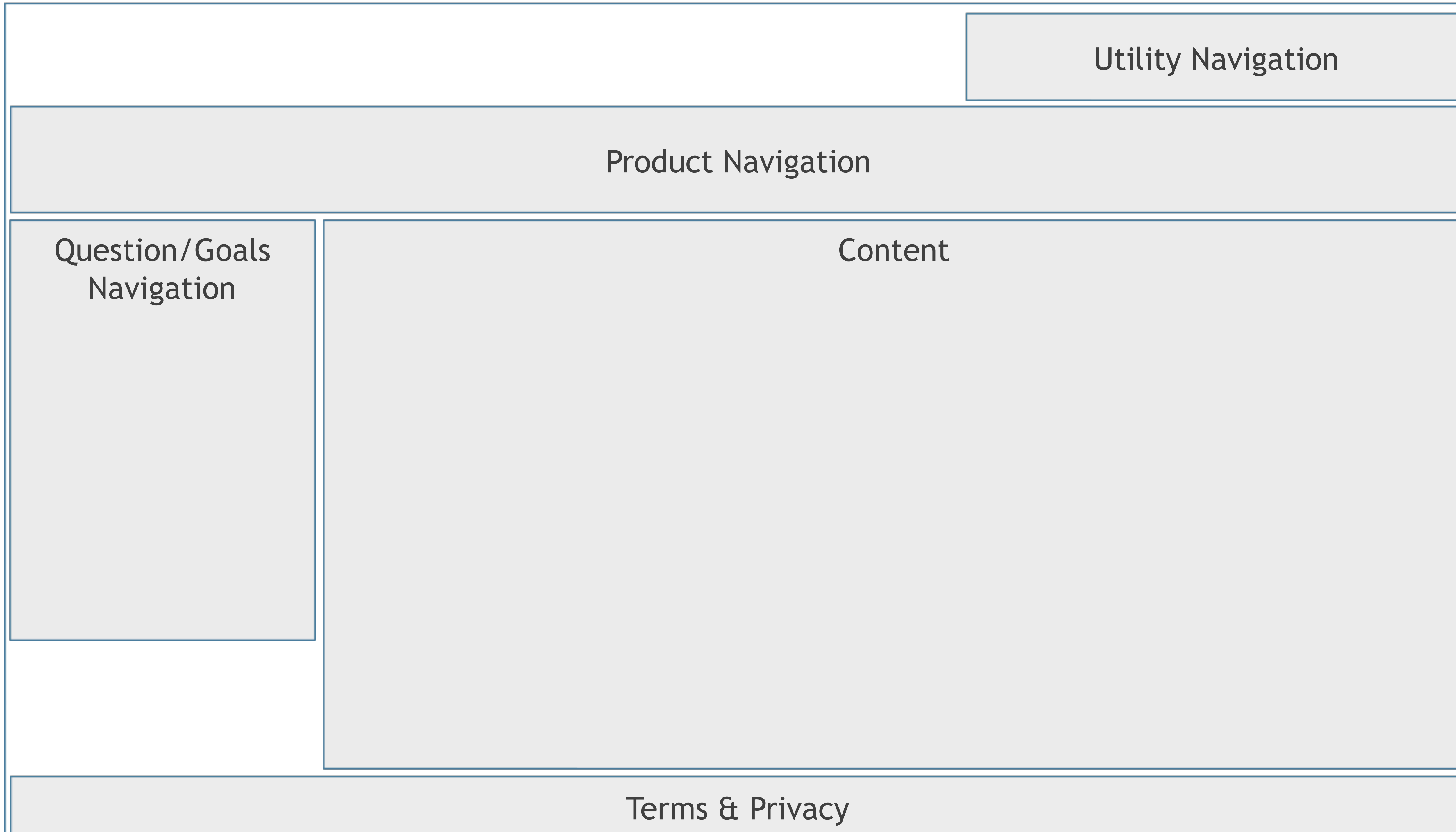


360i

Conceptual homepage sketch



Pathways: Independent Idealist

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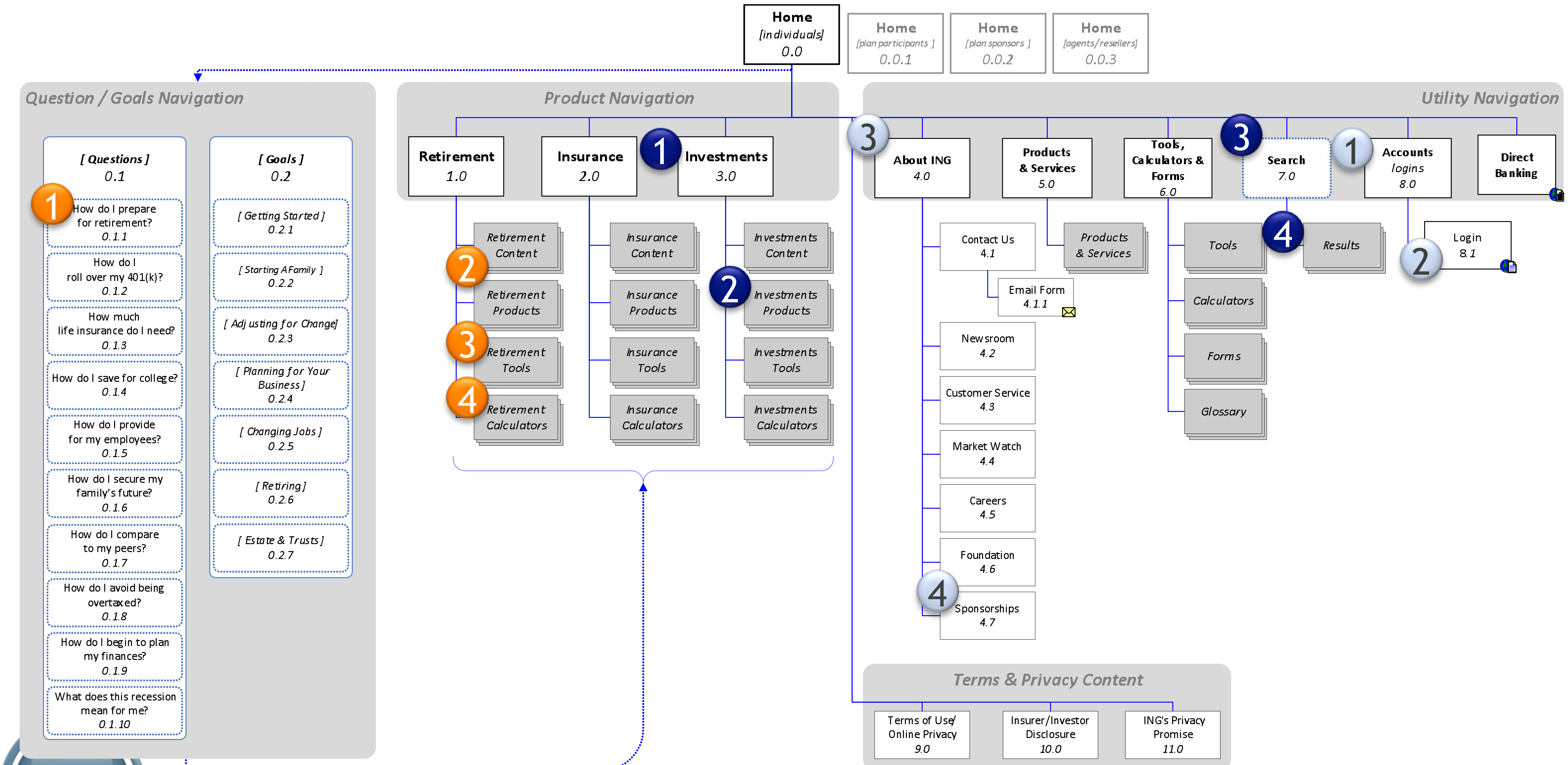
- Realistically plan for retirement
- De-mystify financial products and find out if there are any other products or services than can help reach long and short-term goals
- Quickly and easily look at her 403(b) program online; Is the company I have my 403(b) with socially responsible; do they give back?



Pathways: Pre-planning Prospective

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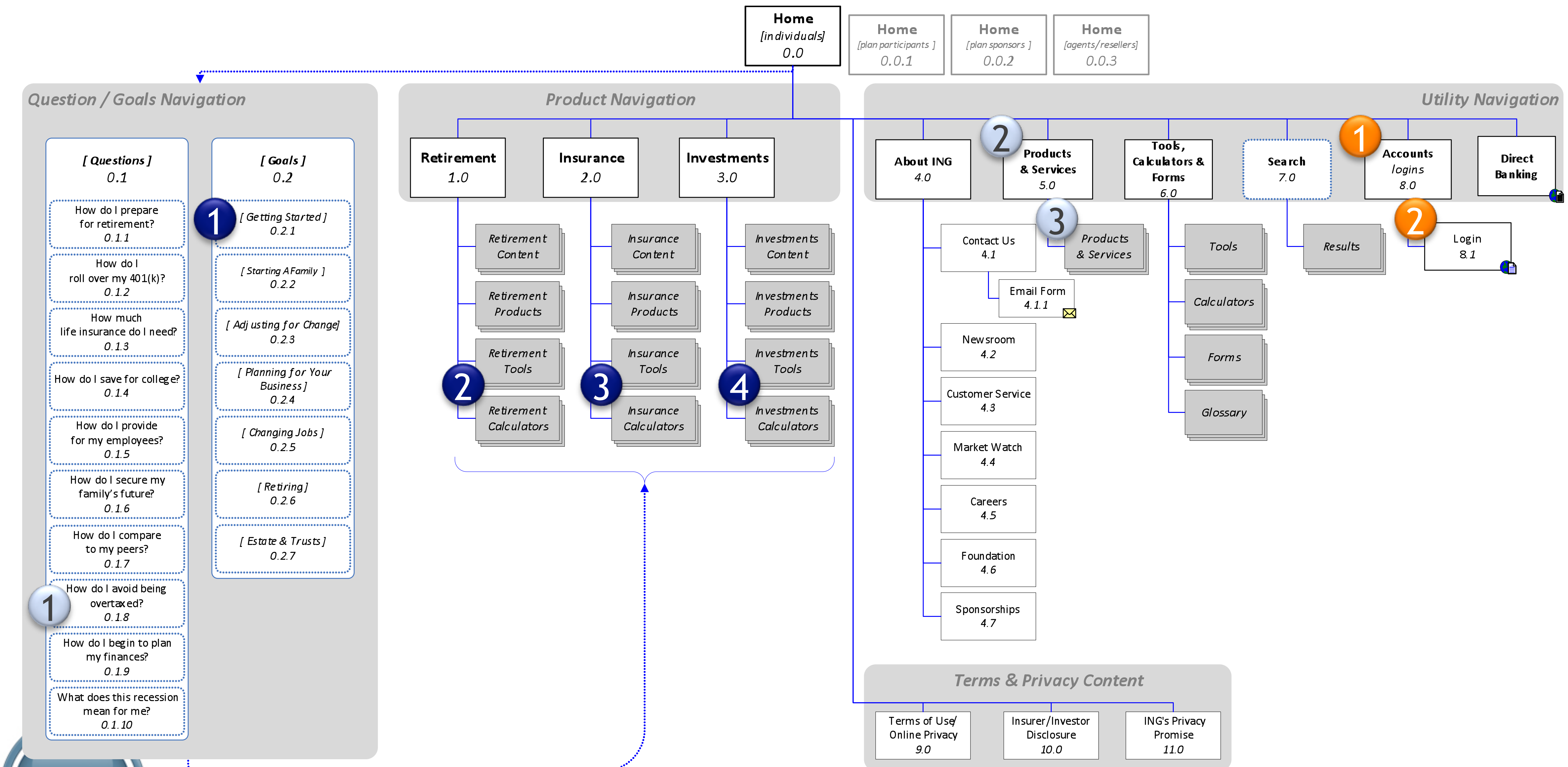
- Quick and easy online transactions
- Access to information about how to begin planning
- Advice (in plain English) about trading: assessing risks, increasing profits, minimizing taxes



Pathways: Financially Curious Gen-Xer

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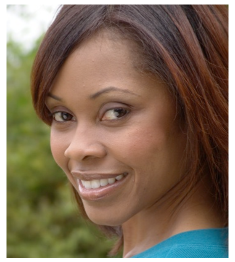
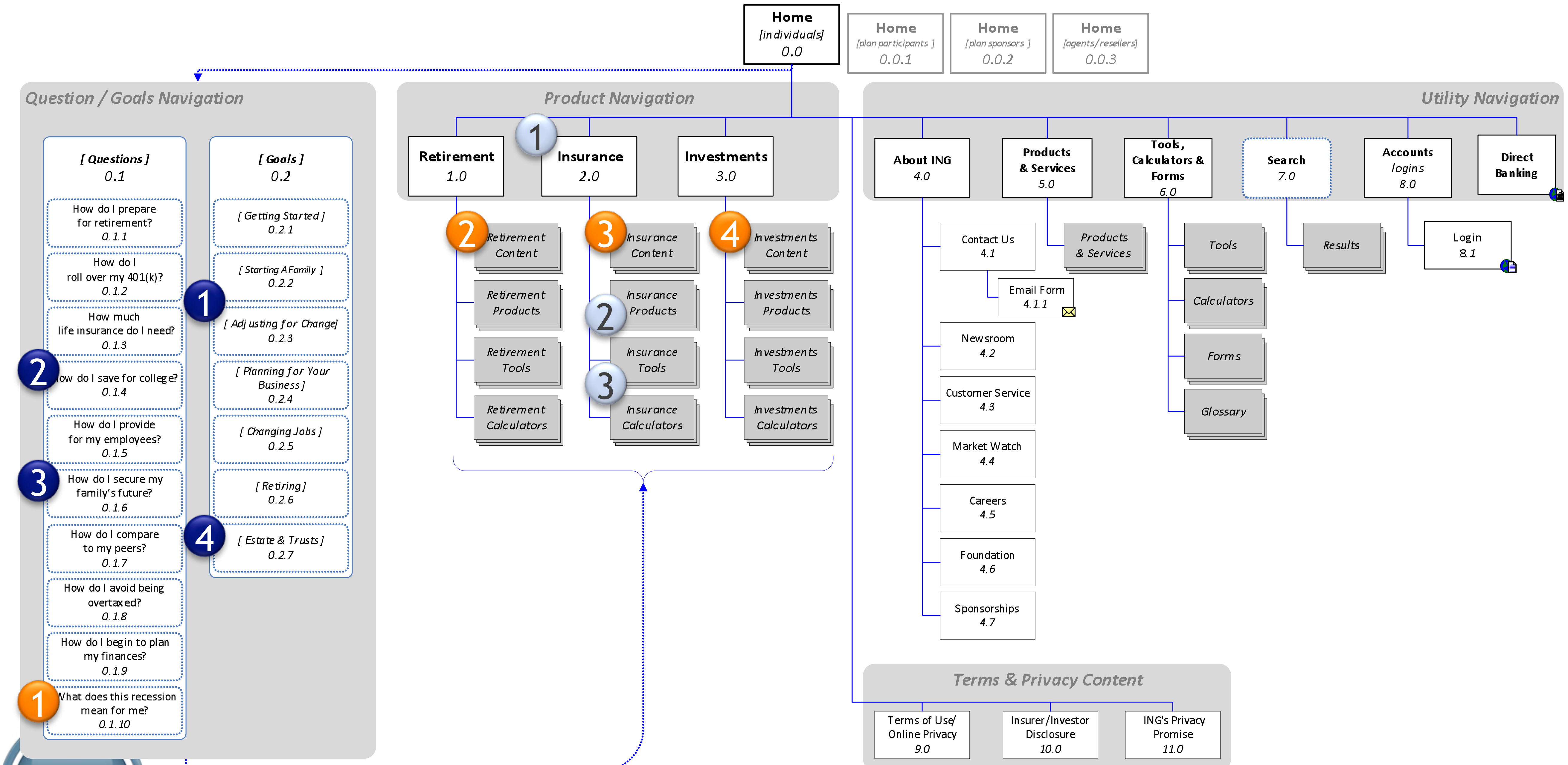
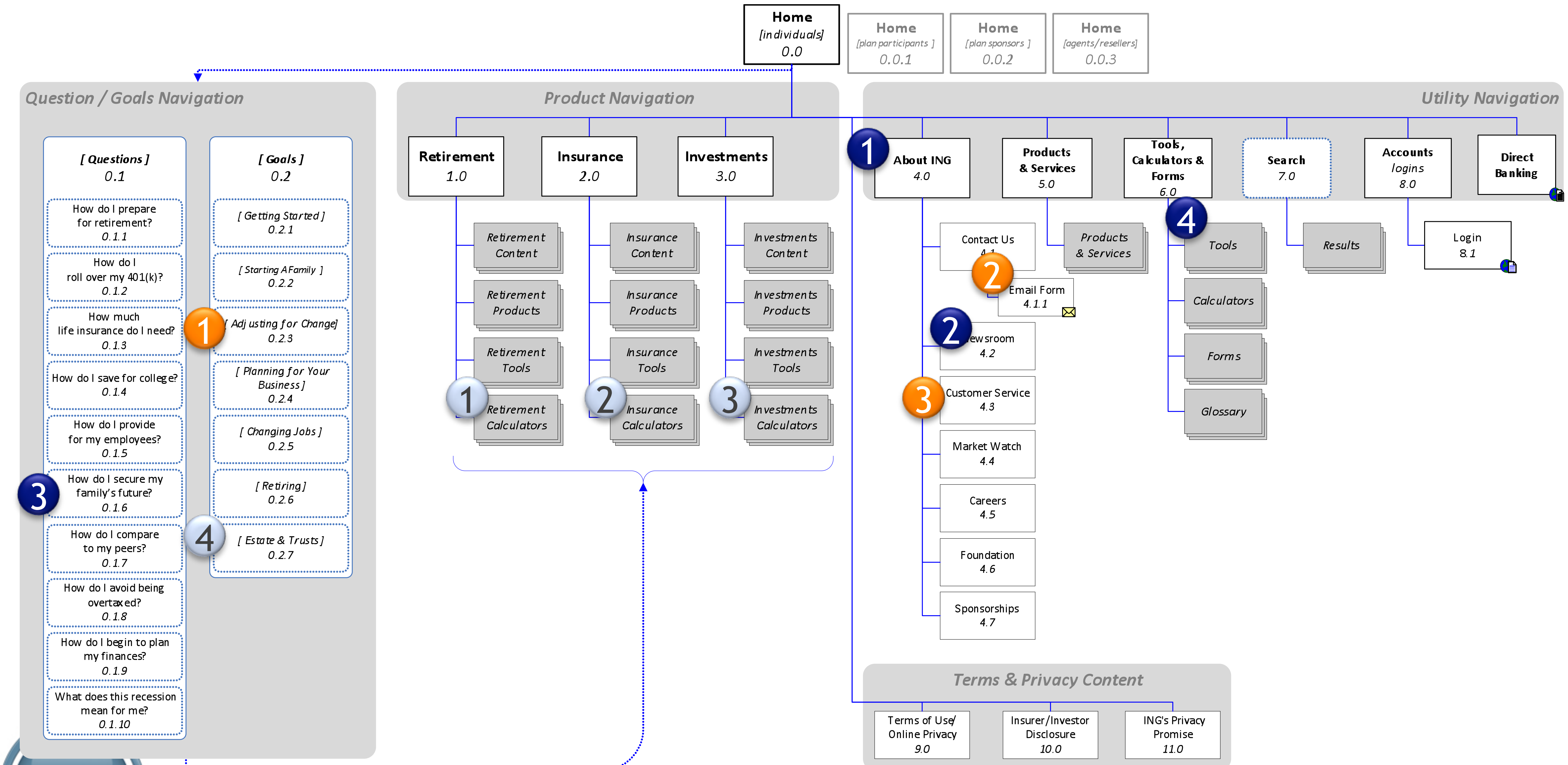


- Know that her money is secure, in spite of the market… and that she's getting the best interest rates
- Put together a financial plan to provide for her family's needs for the long term
- Determine if she and Eric have enough insurance to provide for Hannah



Pathways: Managing Transitions

- Reorient financial plans
- Get solid advice about financial planning
- Find simple and personalized information about financial security; Ensure that her daughter is provided for



Pathways: Rushing Toward Retirement

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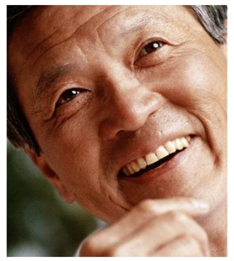
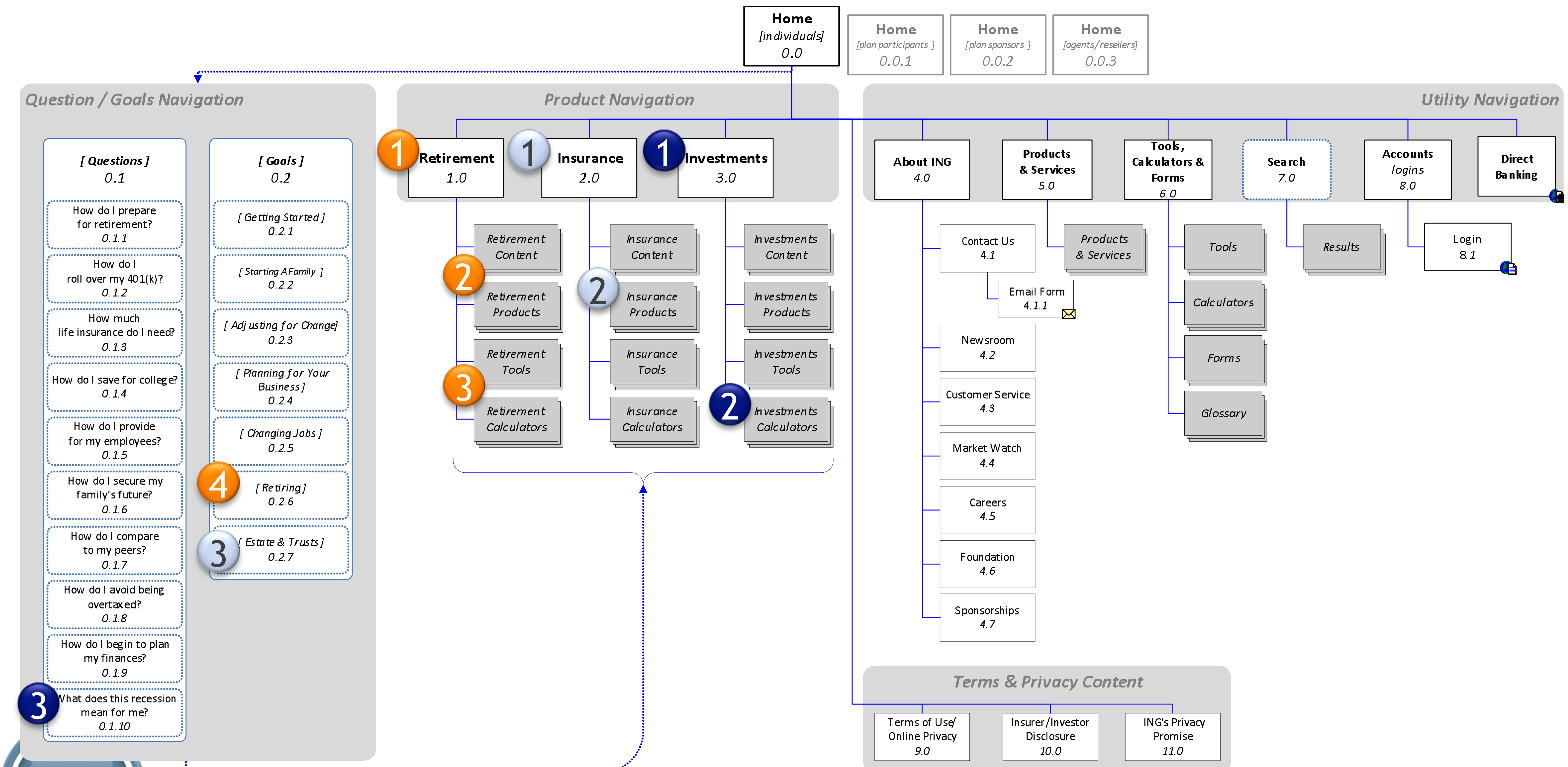
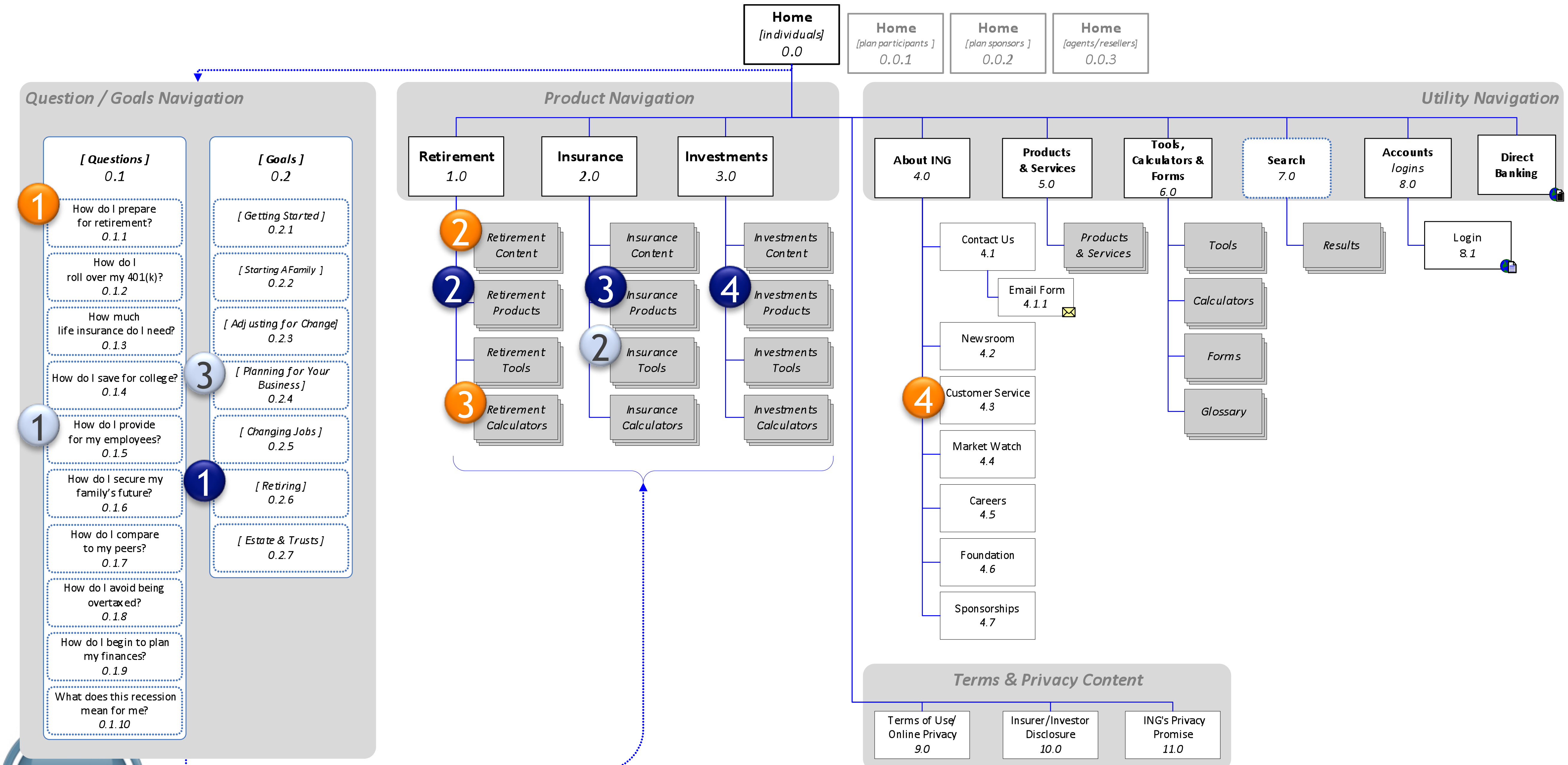


- Enjoy post-retirement life, without worrying about “scraping by”
- Be self-sufficient, so that no matter what happens with the economy, his income will be solid
- Leave money for his children



Pathways: Tentatively Retiring

- Figure out when and how to comfortably retire
- Secure his and his wife's financial future and minimize their dependency on SS and Medicaid/Medicare
- Determine how to offer some benefits to his loyal employees



Pathways: Retired Respite

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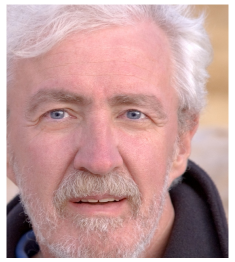

- Ensure that he isn't a burden on his family should he need short or long-term medical care
- Set up college funds for his four grandchildren
- Establish a plan to distribute his estate to his two children with minimal taxation