

## Multiple Methodologies

A leading mutual fund company came to Dialogue Resource looking to develop a more innovative, informative, and entertaining “International Investor” website. They wanted to create a differentiated customer experience for a reasonably sophisticated investor that would result in a mutual fund purchase and/or multiple revisits to the site.

DRI applied several methodologies in succession/combination to help our client move through the following stages of website design.

### • Phase I: Idea Generation

- ... *High Touch Ideation:* A facilitated “brainstorming” session was conducted with client company marketing people and outside design consultants. Over 100 ideas were generated for the new site’s design, content and navigation.
- ... *High-Tech Ideation:* The top 25 ideas were culled from the session’s easel notes and posted on a electronic bulletin board, where client company representatives who did not attend the session could review, “tweak” and offer new ideas.

### • Phase II: Focus Groups

- ... Using output from both ideation exercises, the web design firm created hard copy drafts of potential screens. Focus groups were then conducted to obtain consumer assessments of the design concepts and information packages.

### • Phase III: Usability Testing

- ... Individual interviews were conducted in which potential end-users were invited to navigate a beta site at will. The research was able to directly observe end-user choices, reactions to design/content of specific sections and ease of navigation. The interviews were “staggered” so that course correction could be conducted along the way.

### • Phase IV: Online Research

- ... The feedback from Phase III was incorporated into the final design and an e-Panel was conducted with a larger group of end-users. Panelists logged on and, via a self-administered questionnaire, reviewed and evaluated the test site in detail over one week.

The redesigned website was launched within weeks after the conclusion of the e-Panel (Phase IV). Based on this final stage of user input, site navigation was made more intuitive and specific content easier to locate.

*Dialogue Resource is a marketing research and consulting firm located in Boston MA.*

