Fannie Mae™

10/27/2016

# Customer Digital Experience Website

## Experience Brief

# OVERVIEW

This Experience Brief is intended to provide high-level, strategic guidance. This document brings together our findings of business and user needs, as well as best practices in web design and presents concepts for the new CDX website experience.

# Table of Contents


Activities

Problem Statement

Audience Analysis

User Research Findings

Our Recommendations

High-level Concepts

Visual Design Comps

# Discovery and User Research Activities

Please see Appendix, for list of interviewees

## Stakeholder Interviews

EPAM conducted interviews with key stakeholders to understand the CDX workflow, program needs and current pain points.

## Prioritization Workshop

EPAM conducted a collaborative workshop with members of the CDX team to prioritize content, functions and features.

## User Research

EPAM conducted one-on-one interviews with 2 currently engaged customers, 4 non-engaged customers and 3 CDX team members to understand how they would like to interact and learn about the service.

## SharePoint Assessment

EPAM researched the current state of the Fannie Mae SharePoint environment, including the CDX Site, the Fannie Mae SharePoint farm, development boundaries and governance policies.

# THE PROBLEM

The CDX process values collaboration, empathy and usability. The current CDX site experience is not reflective of those values.

- File sharing and management is challenging.
- There isn’t a centralized tracking or intake process for CDX projects.
- The experience of the current site is not reflective of the unique service CDX provides.
- Doesn’t serve as a functional hub for learning about and showcasing the CDX Program to new and existing customers.

# AUDIENCE ANALYSIS

# Audience Analysis

Based on our research and discovery findings, we've identified 3 main audience types:

## CDX TEAM MEMBERS

**CDX Leadership**
Manages the entire CDX Program. Key stakeholders and decision makers

**Intake Program Manager**
Manages the CDX intake process, assigns team members to project discovery

**Business Engagement Leads**
CDX team leads that help track and manage the project through completion

**Project Analysts**
Assist in the CDX intake and project process

## CDX CUSTOMER

- Needs updates to proposed intake process
- Wants to track project status
- Interested in learning about CDX processes, terminology, tools & templates, etc.

## NEW TO CDX USER

**Potential Customers**

- Visiting the site to learn about the CDX Program
- Possibly looking to contact the group in order to engage with CDX in a project

**Information Seekers**

- Seeking information on how CDX works with organizations at Fannie Mae
- Example: A developer might want to learn about a persona and how it affects their work.

# USER RESEARCH FINDINGS

# Key Findings: CDX Team Members

## Finding files is challenging and time consuming.

- Files are buried in folders and their names are unclear
- Navigating through several libraries and folders becomes frustrating when trying to find a file
- Search results are unreliable resulting in user mistrust
- Currently documents aren't tagged and version control isn't implemented

*"I don't even use search anymore… it never gives me what I want!"*

## Managing a CDX project from intake to completion is cumbersome.

- Intake workflow is managed manually using files, not by the system
- Project documentation is not stored in a central location
- Need a way to elicit feedback from customers

*"We do this all in manual format right now and manage it in sets of documents."*

*"We want to be able to track a project from when we hear about it to the end of the project."*

# Key Findings: EXISTING CUSTOMERS

## Customers need a foundational understanding of Design Thinking and how the CDX process fits with their current workflows.

- Looking for CDX to partner with them and help guide innovative design
- Need to know all the steps of the CDX design process
- Want to understand how the CDX process fits into the project development cycle
- Need to know what activities the business should help schedule and any associated logistics
- Want a continuous learning process about how CDX can help out with all of their projects

> *"I get the theory behind the concept, but I just want to know how it works within a project team."*

# Key Findings: POTENTIAL CUSTOMERS

## People are interested in learning more about CDX services and activities.

- Would like to learn more about the CDX process and the benefits it provides to projects
- Want to understand when and how to engage with CDX
- Would like to know to contact CDX team
- Would like to know more about how CDX can help make their applications more customer centric

*"I would love to know more about how a group like Customer Digital Experience can help in my projects."*

*"If I had known more about how CDX program could help, we would have contacted leadership in CDX much sooner to support my project."*

# Key Findings: INFORMATION SEEKERS

## They want to explore and learn about CDX.

- They are less inclined to go online for information, but prefer to talk face to face or learn from another colleague
- They want to know the members of the CDX team
- When using online resources, they'd like an organized and intuitive experience
- Looking for a self service concept to empower people to engage with CDX, download case studies, templates, etc.

*"I want to go to the site to learn, interact with it and have a clear understanding of who CDX is."*

*"A form could work, it would empower the frontline employee to get the ball rolling instead of looking up."*

# RECOMMENDATIONS

# Strategic Recommendations

## Create a Learning Hub

The CDX program brings a new way of thinking to Fannie Mae. Potential customers need one place to come to learn and understand Design Thinking, how it will benefit their projects and products, as well as to engage with the CDX team. To create this new environment that is reflective of the CDX core values, we recommend the following:

- Create an identity unique to CDX
- Display CDX team members to allow connections with Fannie Mae colleagues

- Prioritize content in a useful and meaningful way
- Provide tools to explore
- Showcase Design Thinking content and success stories to demonstrate value of CDX

- Create a fresh, cutting edge design reflective of the CDX values
- Extend the Fannie Mae brand to the CDX program

# Tactical Recommendations

## Findability

Content and navigation need to be organized around audiences and their needs. This allows users to intuitively find relevant content and perform tasks efficiently. In order to promote better findability we recommend the following:

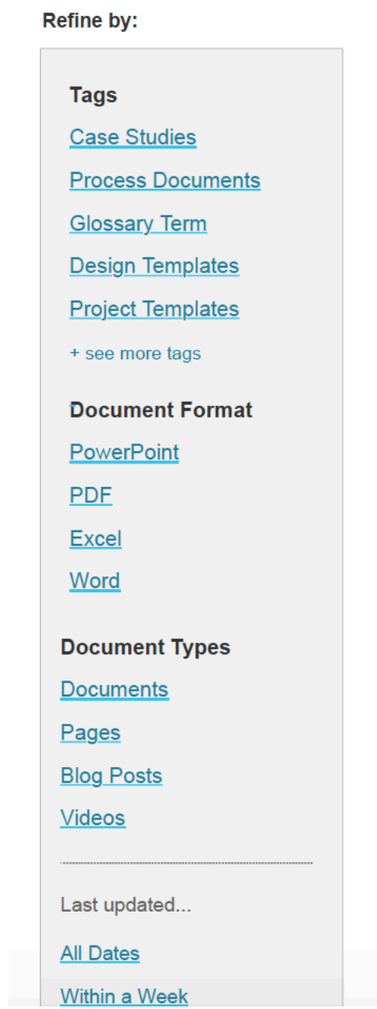
- Define the content hierarchy for each audience and prioritize it accordingly
- Use automatic version control to help find the most recent version of files and reduce extraneous files
- Include personalized content based on audience type and individual preferences:
    - My Projects
    - My Followed Documents
    - My Daily Updates
- Use clear titles for headings, documents and pages; establish easy to use naming conventions, tagging

# Tactical Recommendations

## Search

Search is a crucial part of any great user experience. Not only do a high percentage of site visitors prefer searching over browsing, but the large volume of content within the CDX website makes search a logical choice for finding relevant information. We recommend the following improvements:

- Increase relevancy of search results through configuration:
    - Promoted results – associate specific content to highly used keywords
    - Result blocks – display results from a pre-defined subset of content
    - Results ranking – control the order in which results are displayed
- Add filters to search results; leveraging useful facets such as document type, content tags, date, author, etc.
- Add sorting capabilities to search results

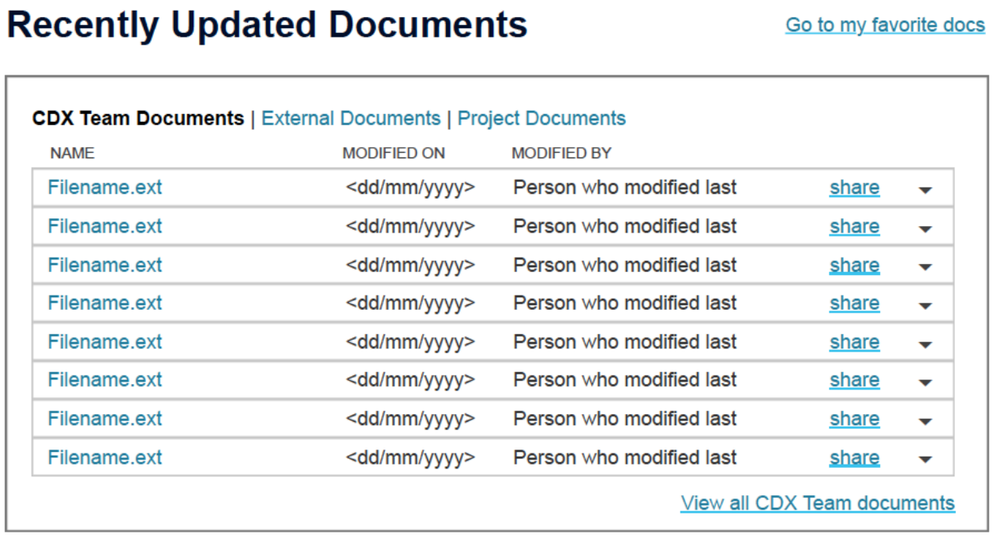


# Tactical Recommendations

## File Sharing and Management

In order for the CDX website to be successful, users should be able to easily share files and manage projects. We recommend the following:

- Elevate the share functionality to grant access to content easily
- My Favorites: Follow documents so they are easily accessible from your profile
- Display recently updated documents on the CDX team dashboard



# Tactical Recommendations

## Centralized Intake and Tracking

Create a streamlined and automated system for processing and tracking projects. We recommend the following:

- Create an online process for project submissions
- Streamline workflow that consistently notifies both CDX team members and customers
- Ability for the customer to track their proposed project status
- Provide project updates
- CDX team members can add details to the project and manage it on a dedicated project detail page
- Send & receive notifications
    - Customer will get an email when there is a change of status
    - CDX team member will get time based notifications on progress

# HIGH-LEVEL CONCEPTS

# Main Navigation Structure

## CDX Customers & Potential Customers

| Home | Our Process | Case Studies | Glossary Terms | Videos & Blogs | Leadership Team |
|---|---|---|---|---|---|
| Hub for learning, engaging and understand the CDX process | Information relating to the CDX Process | Examples of success stories, showcased through case studies | Definitions of CDX related terms and acronyms | Page for users to view videos and blog posts | CDX Leadership Team, contact and profiles |

## CDX Team Members

| Home | CDX Projects | Team Documents | Tools | Videos / Blogs | Onboarding |
|---|---|---|---|---|---|
| Intuitive dashboard to manage and track CDX projects efficiently | Holistic view of all CDX projects that can be filtered for ease of use | Entry point for CDX team to view all team documents by library | Content related to design tools | Page for CDX Team to view videos and blog posts | Page for CDX Team (new or existing) to know everything they need to know |

SharePoint | Last Name, First Name | ? |

Home Site | + Submit Project | + Give feedback

CDX Logo | Our Process | Case Studies | Glossary | Videos / Blog | Leadership Team | Search this site...

# WORK WITH US TO IMPROVE YOUR CUSTOMER EXPERIENCE

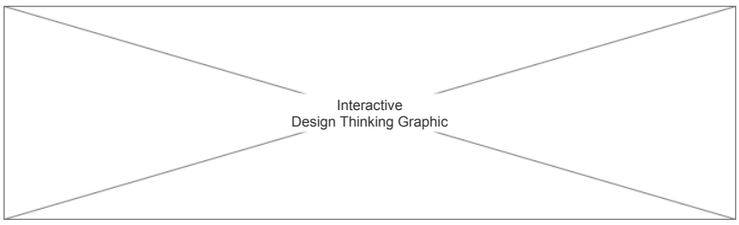
Submit Project

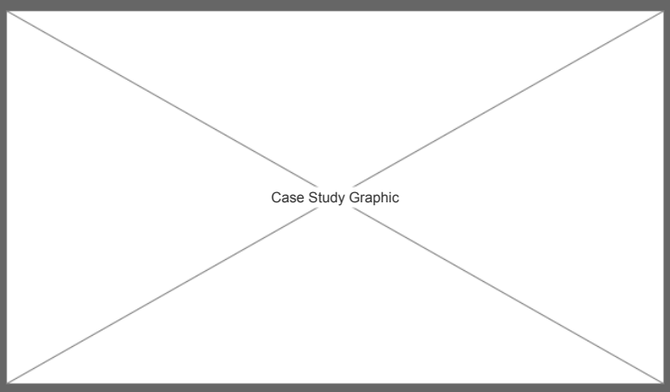
Our Process

## Design Thinking

Design Thinking is simply empathizing with customers and designing elegant solutions that meet their needs. Design Thinking concepts form the foundation of CDX.

Learn more >




Case Study

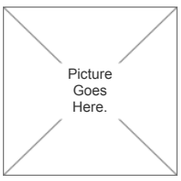
## Investor Direct

**Problem statement:**
The manual nature of the current system for creating and managing Fannie Mae's structured transactions, including Megas, REMICs and RCRs... Read more

See all case studies >

Leadership Team

## Who we are




VP of Customer Digital Experience

**Cindy McKissock**

202.752.2153 | EMAIL CINDY

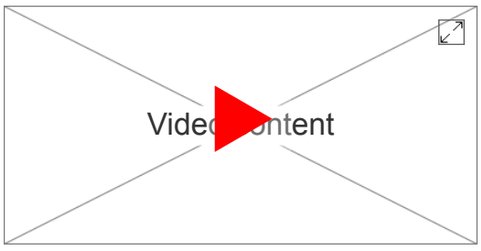
*"Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua."*

View all team members >

Videos & Blogs

## Featured video

**Video:** CDX state of the union address

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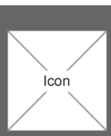
View all videos & blogs >

Glossary Terms

## Know your terms

Get a better understanding for our process by speaking the language.

View all terms >

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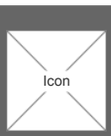


Personas

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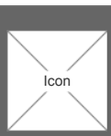


Usability Testing

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Feedback | Submit Project | Sitemap | Homesite | Other Link

SharePoint

Last Name, First Name

< Back to Home Site

+ Submit Project + Give feedback

CDX Logo | Our Process | Case Studies | Glossary | Videos / Blog | Leadership Team | Search this site...

## Current project with CDX

View all your CDX projects

**Investor Direct** <Line of Business> Delivery Date: <dd/mm/yyyy> Phase: <pre-project>

1 Pending Assessment — 2 **Assessing & Framing** — 3 Review — 4 CDX Leadership Approval — 5 Project Begins

**Got questions?**
<Brian> can help...

Email Brian

**Recent Updates**

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Our Process

## Design Thinking...

Design Thinking is simply empathizing with customers and designing elegant solutions that meet their needs. Design Thinking concepts form the foundation of CDX.

Learn more >

Interactive Design Thinking Graphic

Case Study Graphic

Case Study

## Investor Direct

**Problem statement:**
The manual nature of the current system for creating and managing Fannie Mae's structured transactions, including Megas, REMICs and RCRs... Read more

View all cases >

Leadership Team

## Who we are...

Picture Goes Here.

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*"Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua."*

Picture Goes Here. | Picture Goes Here. | Picture Goes Here. | Picture Goes Here. | Picture Goes Here.

View all team members >

Videos & Blogs

## Featured video...

**Video:** CDX state of the union address

Video Content

4:03

View all videos & blogs >

Glossary Terms

## Know your terms...

Get a better understanding for our process by speaking the language.

View all terms >

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Journey Maps

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See some examples

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Personas

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Usability Testing

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See some examples

Feedback | Submit Project | Sitemap | Homesite | Other Link

SharePoint | Last Name, First Name | ?

Home Site | + New intake project | + Give feedback

CDX Logo | CDX Projects | Team Documents | Tools | Videos & Blog | Our Onboarding | Search this site...

## My CDX Projects

View all CDX projects

New intake project

| NAME | LINE OF BUSINESS | CONTACT NAME | DELIVERY DATE | ENGAGEMENT DATE | PROJECT STATUS |
|---|---|---|---|---|---|
| Investor Direct | <Line of Business> | <Point of Contact Name> | <dd/mm/yyyy> | <dd/mm/yyyy> | Assessing & Framing |
| Other Project... | <Line of Business> | <Point of Contact Name> | <dd/mm/yyyy> | <dd/mm/yyyy> | Pending Assessment |
| Yet another one | <Line of Business> | <Point of Contact Name> | <dd/mm/yyyy> | <dd/mm/yyyy> | CDX Leadership |
| OMG another one | <Line of Business> | <Point of Contact Name> | <dd/mm/yyyy> | <dd/mm/yyyy> | Project in Progress |
| Yep another one | <Line of Business> | <Point of Contact Name> | <dd/mm/yyyy> | <dd/mm/yyyy> | Review |

## My updates

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Add an update...

## Recently Updated Documents

Go to my favorite docs

**CDX Team Documents** | External Documents | Project Documents

| NAME | MODIFIED ON | MODIFIED BY | |
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| Filename.ext | <dd/mm/yyyy> | Person who modified last | share |
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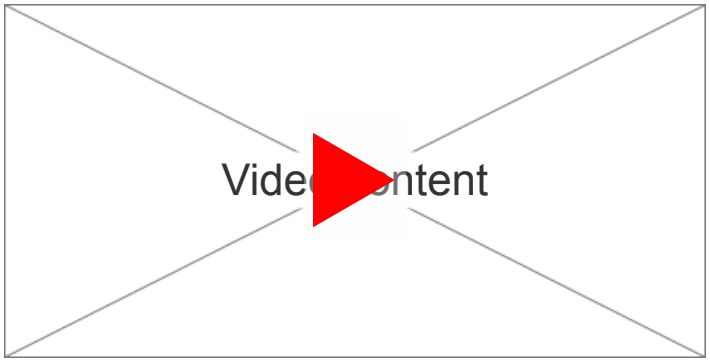
View all CDX Team documents

## Videos

View all videos & blog posts

**Video:** CDX state of the union address

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CDX Projects | Team Documents | Tools | Videos & Blog | Our Onboarding

# CDX Projects

New intake project

**All CDX Projects** | My CDX Projects

**Filter by:** All Statuses

| NAME | LINE OF BUSINESS | CONTACT NAME | ENGAGEMENT LEAD | DELIVERY DATE | ENGAGEMENT DATE | PROJECT STATUS |
|---|---|---|---|---|---|---|
| Investor Direct | <Line of Business> | <Point of Contact Name> | <Name of BEL> | <dd/mm/yyyy> | <dd/mm/yyyy> | Assessing & Framing |
| Other Project... | <Line of Business> | <Point of Contact Name> | <Name of BEL> | <dd/mm/yyyy> | <dd/mm/yyyy> | Pending Assessment |
| Yet another one | <Line of Business> | <Point of Contact Name> | <Name of BEL> | <dd/mm/yyyy> | <dd/mm/yyyy> | CDX Leadership |
| OMG another one | <Line of Business> | <Point of Contact Name> | <Name of BEL> | <dd/mm/yyyy> | <dd/mm/yyyy> | Project in Progress |
| Project again | <Line of Business> | <Point of Contact Name> | <Name of BEL> | <dd/mm/yyyy> | <dd/mm/yyyy> | Assessing & Framing |
| Project one more time | <Line of Business> | <Point of Contact Name> | <Name of BEL> | <dd/mm/yyyy> | <dd/mm/yyyy> | Pending Assessment |
| Yet another one | <Line of Business> | <Point of Contact Name> | <Name of BEL> | <dd/mm/yyyy> | <dd/mm/yyyy> | Project Complete |
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| OMG another one | <Line of Business> | <Point of Contact Name> | <Name of BEL> | <dd/mm/yyyy> | <dd/mm/yyyy> | Project Complete |

# Investor Direct [ edit ]

Existing product
<Line of Business>
<Contact Person>

Delivery Date: <dd/mm/yyy>
Engagement Date: <dd/mm/yyyy>

CDX Team Member Assigned
Alton Hill, alton_hill@fanniemae.com

PROJECT STATUS
Assessing & Framing

Go to Investor Direct Project Site >

**Intake Process** | Project Related Activities

## Description [ Edit ]

Strategic review of the website including user research and a hueristic assessment that leads to a recommended digital strategy including a discovery with user experience and architecture recommendations for the existing website platform.

## Background Information [ Edit ]

CDX Team will provide design services for the strategic review of the current site. The primary focus of this engagement will be user experience and a content assessment of the existing site. The assessments and interviews will provide user experience and design for the short-term solution, and user experience for the future state recommenations. The project will provide these documented solutions as well as findings and recommendations based on the assessments, and stakeholder and user interviews leading to a strategic roadmap.

## Key Activities [ Edit ]

- **Stakeholder Interviews**
  CDX will conduct stakeholder interviews to provide strategic direction and begin to gather business and technical requirements for short-term and future state recommendations.
- **User Research; interviews with a distinct user groups**
  CDX will conduct user research in context to identify gaps and pain points for users of the existing website. It will also provide insights to the CDX team to create personas that help provide context and help enhance the overall usability of the tool.
- **Ideation Workshops**
  CDX will provide a collaborative workshop to allow ideas across all project team members to help inform the design process.
- **Prioritization Workshop**
  CDX will provide a collaborative session to help prioritize features, functions and workflows so organizational content can be delivered appropriately.

## Project Files + add files

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## Project Team Updates... + add an update

- Brian, Shannel and Al met to whiteboard details of the engagement and how to frame up the project plan.
- We've discovered some pieces of information from the customer that we need to investigate further. We'll setup a meeting with the customer to address the concerns.
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## Key Deliverables [ Edit ]

**Personas: 3-5 identified user architypes**
Investor Direct Personas.pptx 10/27/2016 Author Name Share

**Customer Journey Maps: Future process**
Investor Direct Journey Maps.pptx 10/27/2016 Author Name Share

**Interactive Wireframe: Concept Designs**
Investor Direct Wireframes.zip 10/27/2016 Author Name Share

**Visual Design Comps: Design Patterns and Visuals**
Investor Direct Visual Designs.pptx 10/27/2016 Author Name Share

**Experience Brief: Findings and Recommendations**
Investor Direct Experience Brief.pptx 10/27/2016 Author Name Share

## Comments / Notes + add a note

10:30 am 10/18/16 by Brian Herbert
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10:55 am 10/20/16 by Alton Hill
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SharePoint | Last Name, First Name | ? | Home Site | + Submit Project | + Give feedback

CDX Logo | Our Process | Case Studies | Glossary | Videos / Blog | Leadership Team | Design Thinking

Home / Search Results

# Search

**Refine by:**

**Tags**
- Case Studies
- Process Documents
- Glossary Term
- Design Templates
- Project Templates
- + see more tags

**Document Format**
- PowerPoint
- PDF
- Excel
- Word

**Document Types**
- Documents
- Pages
- Blog Posts
- Videos

Last updated...
- All Dates
- Within a Week
- Within a Month
- Within a Year
- More than a Year

343 results found for **Design Thinking**

Relevance

Icon **Definition: Design Thinking**
Design Thinking is simply empathizing with customers and designing elegant solutions that meet their needs. Design Thinking concepts form the foundation of CDX.

Icon **CDX - Design Thinking Lorem ipsum.pptx** Download

Icon **CDX - Lorem Ipsum design thinking process.pdf** Download

Icon **Design thinking process.xlsx** Download

Icon **Page: Glossary Terms**
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Design Thinking, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur... READ MORE

Icon **Persona - Design Thinking.pptx** Download

Icon **Post: Design Thinging - CDX Process**
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Icon **Video: What is design thinking?**
Video Content
4:03

1 2 3 4 5 →

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# Glossary Terms

Icon

## DESIGN THINKING

Design Thinking is simply empathizing with customers and designing elegant solutions that meet their needs. Design Thinking concepts form the foundation of CDX. The design thinking process consists of these 5 steps:

**Empathize:**
Work to fully understand the experience of the user for whom you are designing. Do this through observation, interaction, and immersing yourself in their experiences.

**Define:**
Process and synthesize the findings from your empathy work in order to form a user point of view that you will address with your design.

**Ideate:**
Explore a wide variety of possible solutions through generating a large quantity of diverse possible solutions, allowing you to step beyond the obvious and explore a range of ideas.

**Prototype:**
Transform your ideas into a physical form so that you can experience and interact with them and, in the process, learn and develop more empathy.

**Test:**
Try out high-resolution products and use observations and feedback to refine prototypes, learn more about the user, and refine your original point of view.

Learn more... **Go to our process**

Icon

## JOURNEY MAP

A Customer Journey map is a visual or graphic interpretation of the overall story from an individual's perspective of their relationship with an organization, service, product or brand, over time and across channels. They are one tool that can help organizations evolve from a transactional approach to one that focuses on long term relationships with customers built on respect, consistency and trust.

See an example... **Download JourneyMap.pptx**

Icon

## PERSONA

A persona is a way to model, summarize and communicate research about people who have been observed or researched in some way. A persona is depicted as a specific person but is not a real individual; rather, it is synthesized from observations of many people. Each persona represents a significant portion of people in the real world and enables the designer to focus on a manageable and memorable cast of characters, instead of focusing on thousands of individuals. Personas aid designers to create different designs for different kinds of people and to design for a specific somebody, rather than a generic everybody.

See an example... **Download Personas.pptx**

Icon

## USABILITY TESTING

Usability testing refers to evaluating a product or service by testing it with representative users. Typically, during a test, participants will try to complete typical tasks while observers watch, listen and takes notes. The goal is to identify any usability problems, collect qualitative and quantitative data and determine the participant's satisfaction with the product.

To run an effective usability test, you need to develop a solid test plan, recruit participants , and then analyze and report your findings. During a usability test, you will:

- Learn if participants are able to complete specified tasks successfully and
- Identify how long it takes to complete specified tasks
- Find out how satisfied participants are with your Web site or other product
- Identify changes required to improve user performance and satisfaction
- And analyze the performance to see if it meets your usability objectives

Learn more... **Download UsabilityTesting.pptx**

# VISUAL DESIGN COMPS

## New to CDX User Home Page

CUSTOMER
DIGITAL
EXPERIENCE

# RECOMMENDED DESIGN DIRECTION

A unique experience, among the Fannie Mae digital ecosystem, that reflects the values and processes of CDX. This direction gives CDX it’s own identity as an extension and enhancement of the Fannie Mae brand. New typography system and color palette defines the CDX digital persona.

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+ FEEDBACK
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case studies
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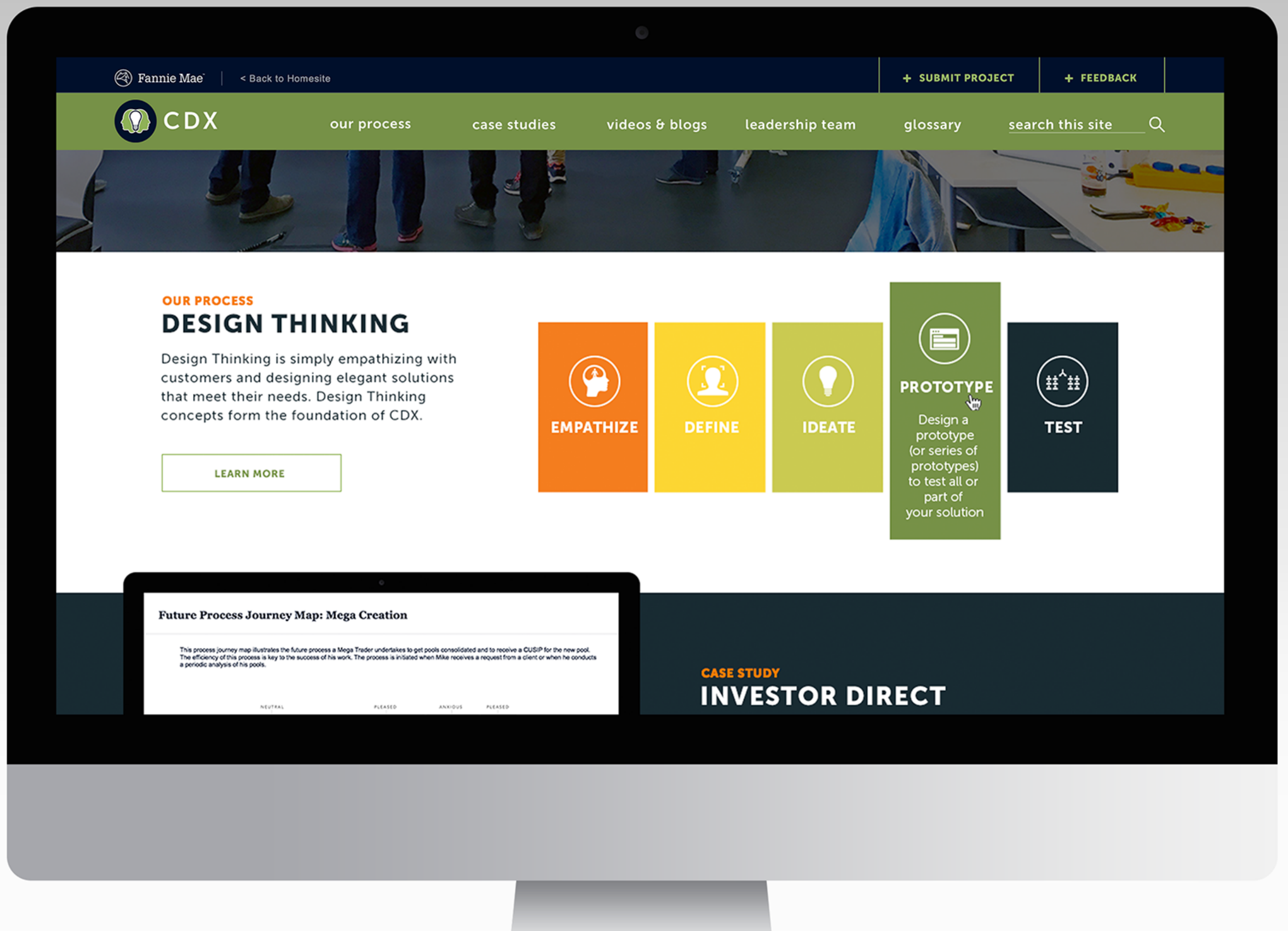
WORK WITH US TO IMPROVE YOUR CUSTOMER'S EXPERIENCE
SUBMIT PROJECT
OUR PROCESS
DESIGN THINKING
Design Thinking is simply empathizing with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OUR PROCESS
DESIGN THINKING
Design Thinking is simply empathizing with customers and designing elegant solutions that meet their needs. Design Thinking concepts form the foundation of CDX.
LEARN MORE
EMPATHIZE
DEFINE
IDEATE
PROTOTYPE
Design a prototype (or series of prototypes) to test all or part of your solution
TEST
Future Process Journey Map: Mega Creation
This process journey map illustrates the future process a Mega Trader undertakes to get pools consolidated and to receive a CUSIP for the new pool. The efficiency of this process is key to the success of his work. The process is initiated when Mike receives a request from a client or when he conducts a periodic analysis of his pools.
NEUTRAL
PLEASED
ANXIOUS
PLEASED
CASE STUDY
INVESTOR DIRECT

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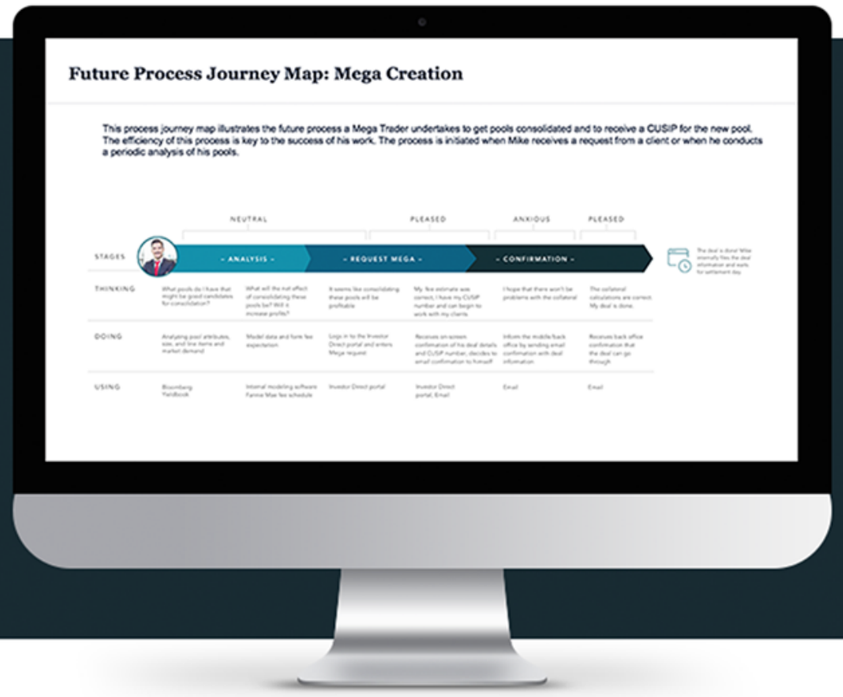
+ SUBMIT PROJECT + FEEDBACK

CDX

our process | case studies | videos & blogs | leadership team | glossary | search this site




CASE STUDY

## INVESTOR DIRECT

**Problem statement:**

The manual nature of the current system for creating and managing Fannie Mae's structured transactions, including Megas, REMICs and RCRs...**read more**

SEE ALL CASE STUDIES

LEADERSHIP TEAM

WHO WE ARE

VIDEOS & BLOGS

FEATURED VIDEO

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+ SUBMIT PROJECT | + FEEDBACK

CDX

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LEADERSHIP TEAM

## WHO WE ARE

Take a moment to learn about our leaders and hear their thoughts about Customer Digital Experience.

VP of Customer Digital Experience

**CINDY MCKISSOCK**

202.752.2153 | EMAIL CINDY

*"My goal is to ensure our customers' experience with Fannie Mae is simple, certain, dynamic, and of course, delightful!"*

VIEW ALL TEAM MEMBERS

VIDEOS & BLOGS

## FEATURED VIDEO

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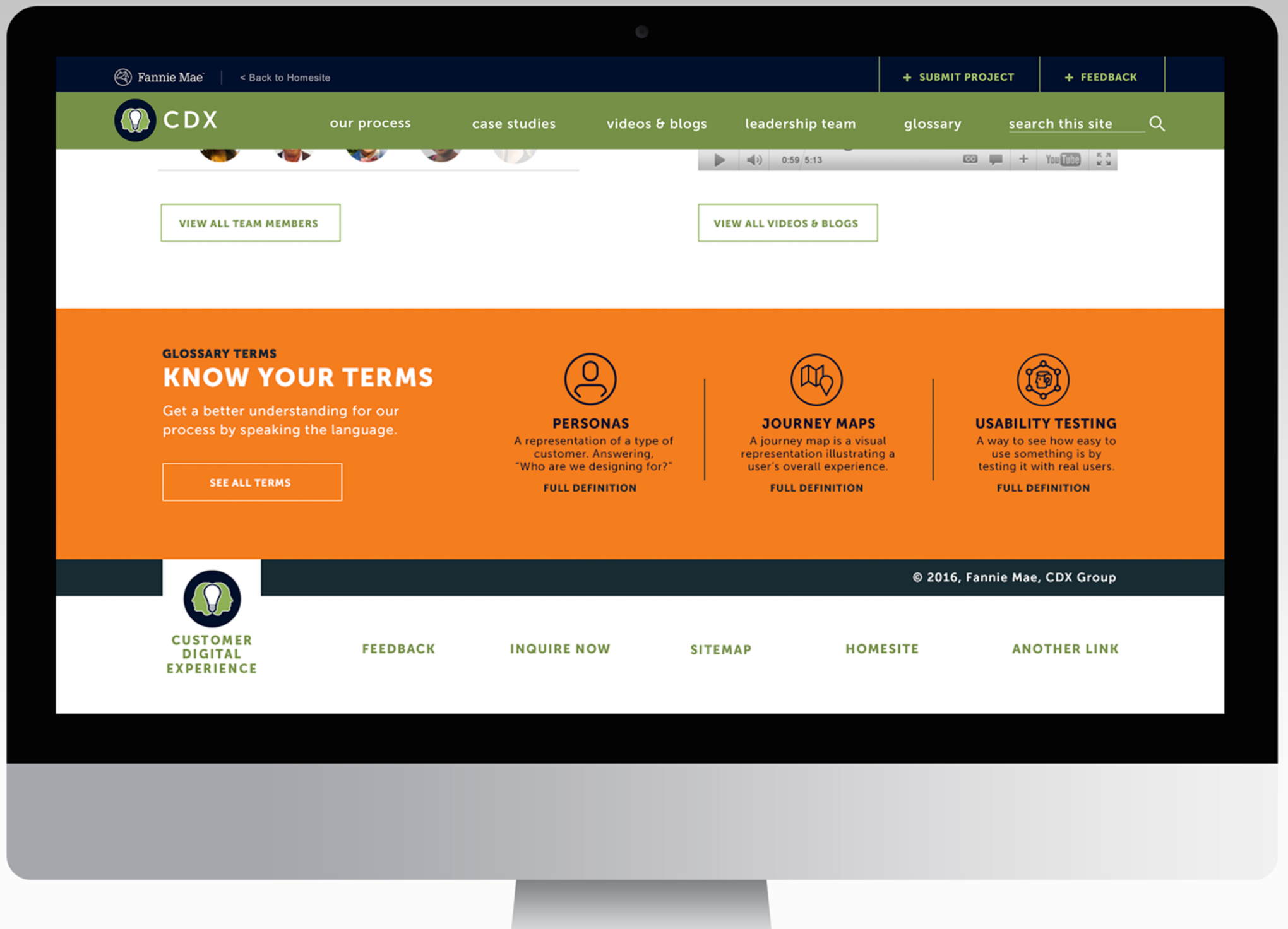
VIEW ALL VIDEOS & BLOGS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0:59 5:13
VIEW ALL TEAM MEMBERS
VIEW ALL VIDEOS & BLOGS
GLOSSARY TERMS
KNOW YOUR TERMS
Get a better understanding for our process by speaking the language.
SEE ALL TERMS
PERSONAS
A representation of a type of customer. Answering, "Who are we designing for?"
FULL DEFINITION
JOURNEY MAPS
A journey map is a visual representation illustrating a user's overall experience.
FULL DEFINITION
USABILITY TESTING
A way to see how easy to use something is by testing it with real users.
FULL DEFINITION
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CUSTOMER DIGITAL EXPERIENCE
FEEDBACK
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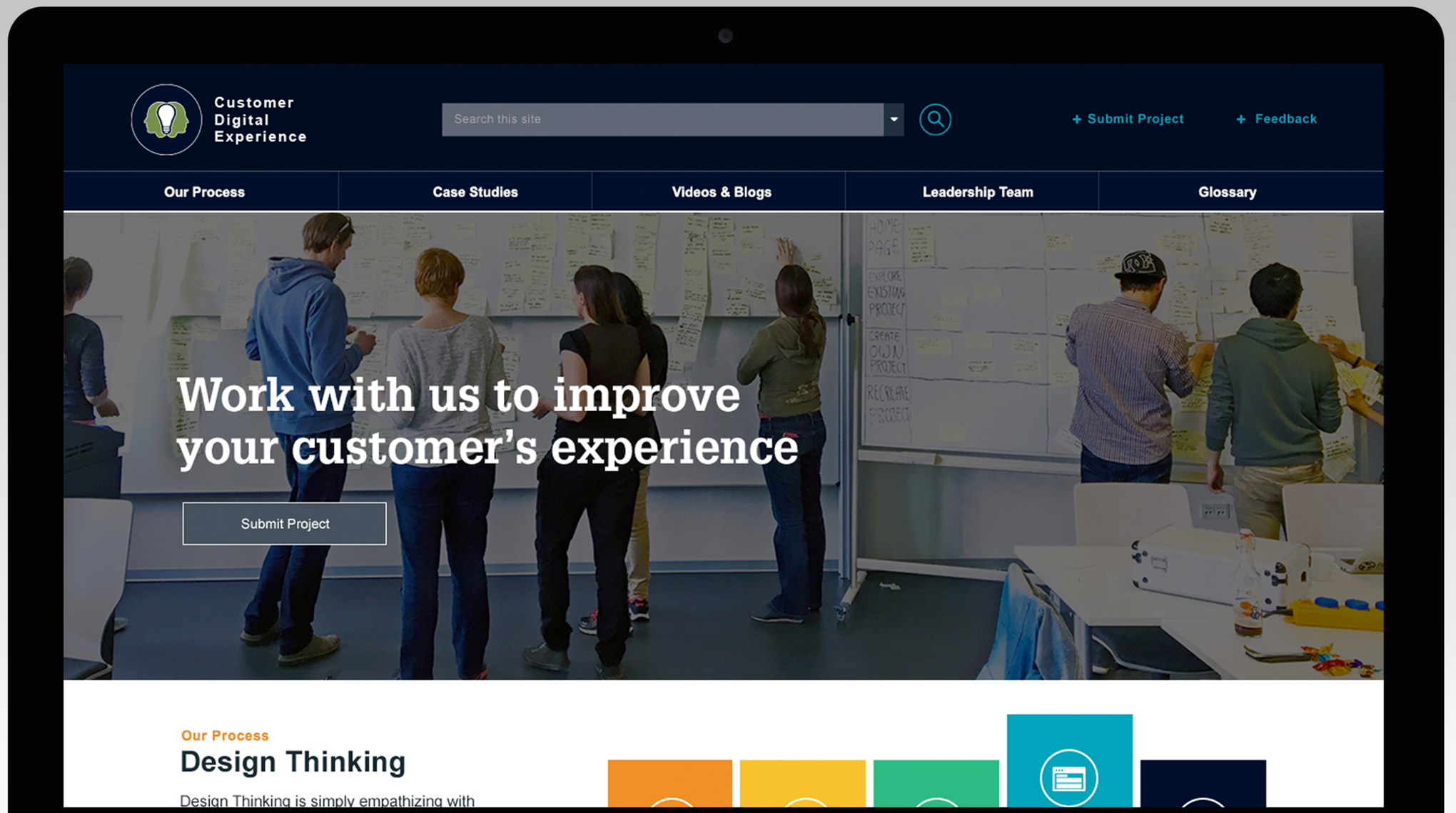
ANOTHER LINK

# ALTERNATE DESIGN DIRECTION

**Reflective of the Fannie Mae brand, Direction No. 2 uses fonts and colors from within the guidelines, as well as the header and footer seen across internal applications and sites. This option also features the same recommended layout.**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Digital
Experience
Search this site
+ Submit Project
+ Feedback
Our Process
Case Studies
Videos & Blogs
Leadership Team
Glossary
Work with us to improve
your customer's experience
Submit Project
Our Process
Design Thinking
Design Thinking is simply empathizing with

Our Process

## Design Thinking

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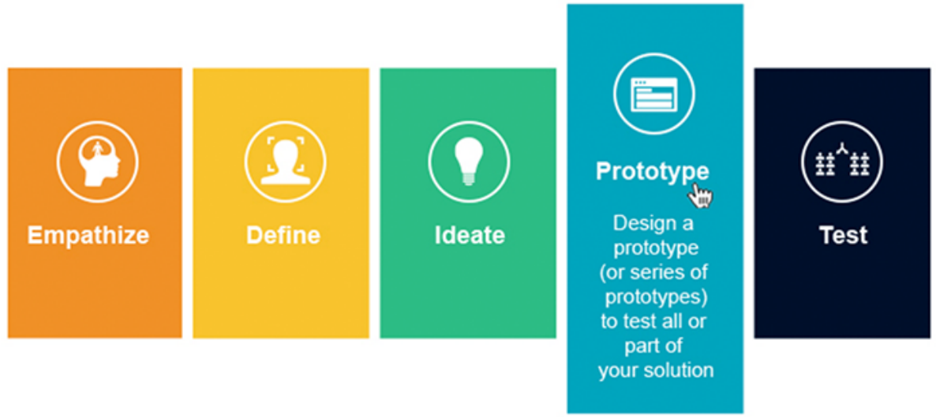
Learn More



Case Study

## Investor Direct

Problem statement:

The manual nature of the current system for creating and managing Fannie Mae's structured transactions, including Megas, REMICs and RCRs...read more

See All Case Studies

Leadership Team

## Who We Are

Take a moment to learn about our leaders and hear their thoughts about Customer Digital Experience.

VP of Customer Digital Experience

### Cindy McKissock

202.752.2153 | Email Cindy

*"My goal is to ensure our customers' experience with Fannie Mae is simple, certain, dynamic, and of course, delightful!"*

View All Team Members

Videos & Blogs

## Featured Video

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View All Videos & Blogs

202.752.2153 | Email Cindy

*"My goal is to ensure our customers' experience with Fannie Mae is simple, certain, dynamic, and of course, delightful!"*

View All Team Members

View All Videos & Blogs

Glossary Terms

## Know Your Terms

Get a better understanding for our process by speaking the language.

See All Terms

**Personas**
A representation of a type of customer. Answering, "Who are we designing for?"
Full Definition

**Journey maps**
A journey map is a visual representation illustrating a user's overall experience.
Full Definition

**Usability Testing**
A way to see how easy to use something is by testing it with real users.
Full Definition

Fannie Mae

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# THANK YOU

# APPENDIX

# SUCCESS METRICS

# Success Metrics

| Success Metric | Current State | Future Benchmark |
|---|---|---|
| **Versioning** | Manually done, multiple versions available | Automatic versioning, single versions available |
| **Tagging external content** | No tags, files are organized with folders | All external files tagged by topic in a flat list, navigable by topic |
| **Finding internal content** | Team members need to ask each other where files are located, library views | Files are quickly found via navigation/filtering without needing to ask someone |
| **Search Facets** | Facets are unavailable on search results page | Facets are available on search results page |
| **Request Intake** | Request intake and tracking is sprawled | Request intake and tracking is centralized to a single list |
| **Content about CDX** | Content is hard to find and spread out to many locations | Key content (the playbook for example) is available within 0-2 clicks from the homepage. Popular content is surfaced. |
| **Updated design** | Look and feel is default SharePoint | Live site reflects the chosen design. |

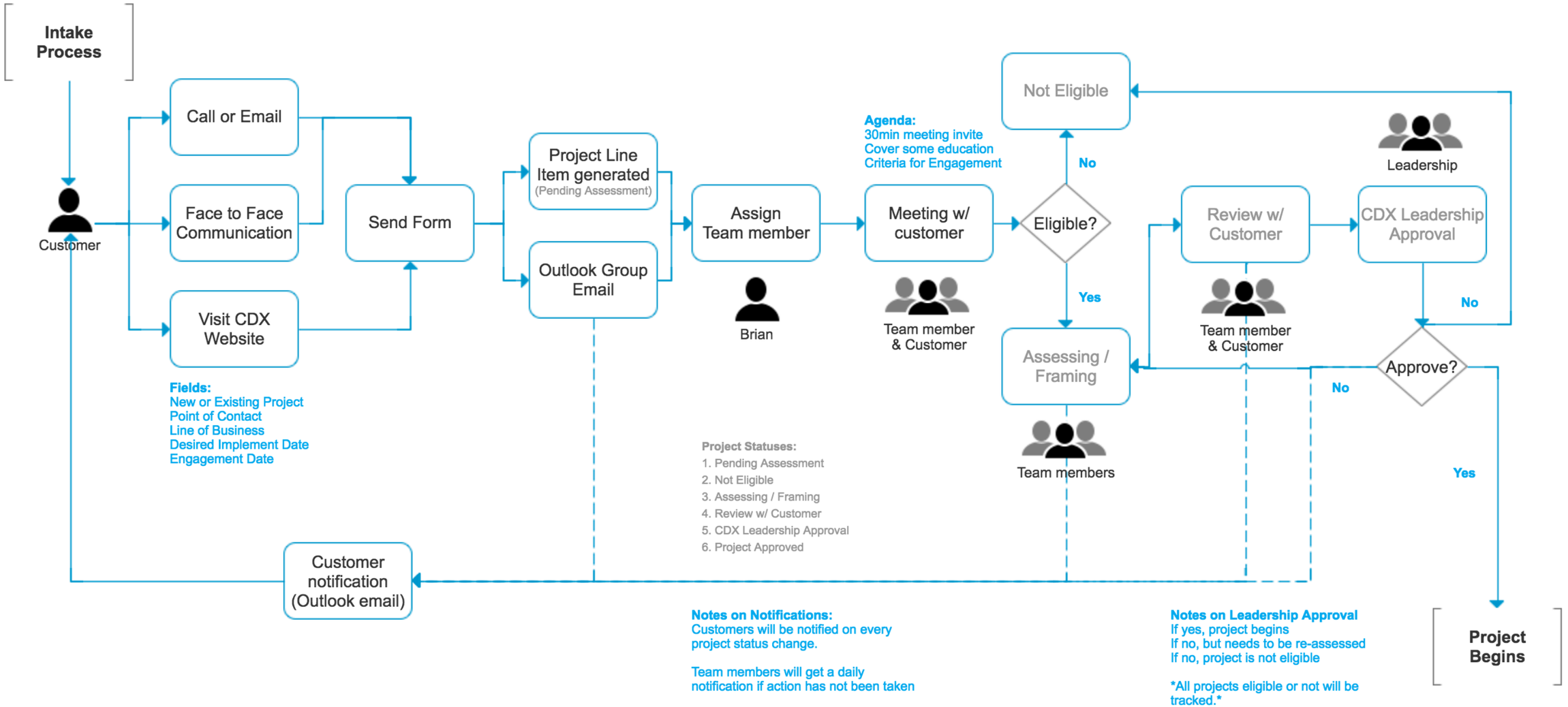
# Key Findings: Website Theme Possibilities

| Home | Search | Intake Process | Organize | Storing / Sharing | Feedback | Marketing | Look & Feel | Video / Blog |
|---|---|---|---|---|---|---|---|---|
| Dashboard / tiled design | Global search to find info quick | Time sensitive SLAs | Navigate files with metadata | Storing files as backup from project | Generic Feedback function all pages | Word of mouth marketing | Visually appealing | Video blog |
| Describe design thinking | Search filters to reduce results | Regular notifications to requestor | Organize files by function | Ability to share files across projects | Usefulness ratings on documents | Voice and tone will be important | Design should be clean | Possibly a blog |
| Possible infographics | Contextual searching | Regular notifications to team | Tag cloud with reviewable tags | Ability to share content within CDX | Comments section | One cosnistent clear message | Similar to Home Site | |
| Case Study | Document preview on results | Send requestor information on CDX | Deep link to key terms | Ability to create content within CDX | Survey to collect feedback | Findable from Home Site | Intuitive interface | |
| Tools & Templates | auto-complete searching | Send request to CDX group email | Possible glossary terms | Version Control for files | | Email marketing | All sites are completely different across FNM | |
| Sample of CDX Process | | Short form to get context of project | Wiki-like content on pages | Ability to have retrospects | | Brown bag learning sessions | Need CDX to represent good design | |
| CDX Service Plan | | Project status and information | Archiving old content | Ability to share retrospects | | | | |
| Access to the CDX Playbook | | Ability to update status through process | Sort lists by last modified (default) | Local File System (OneDrive Sync) | | | | |
| Easy way to contact CDX group | | Fire off reminder to team for completion | | Co-Authoring (instant edit) | | | | |
| | | | | Create Action items from team meetings | | | | |
| | | | | Create/Share daily updates | | | | |
| | | | | Internal Knowledge Exchange | | | | |

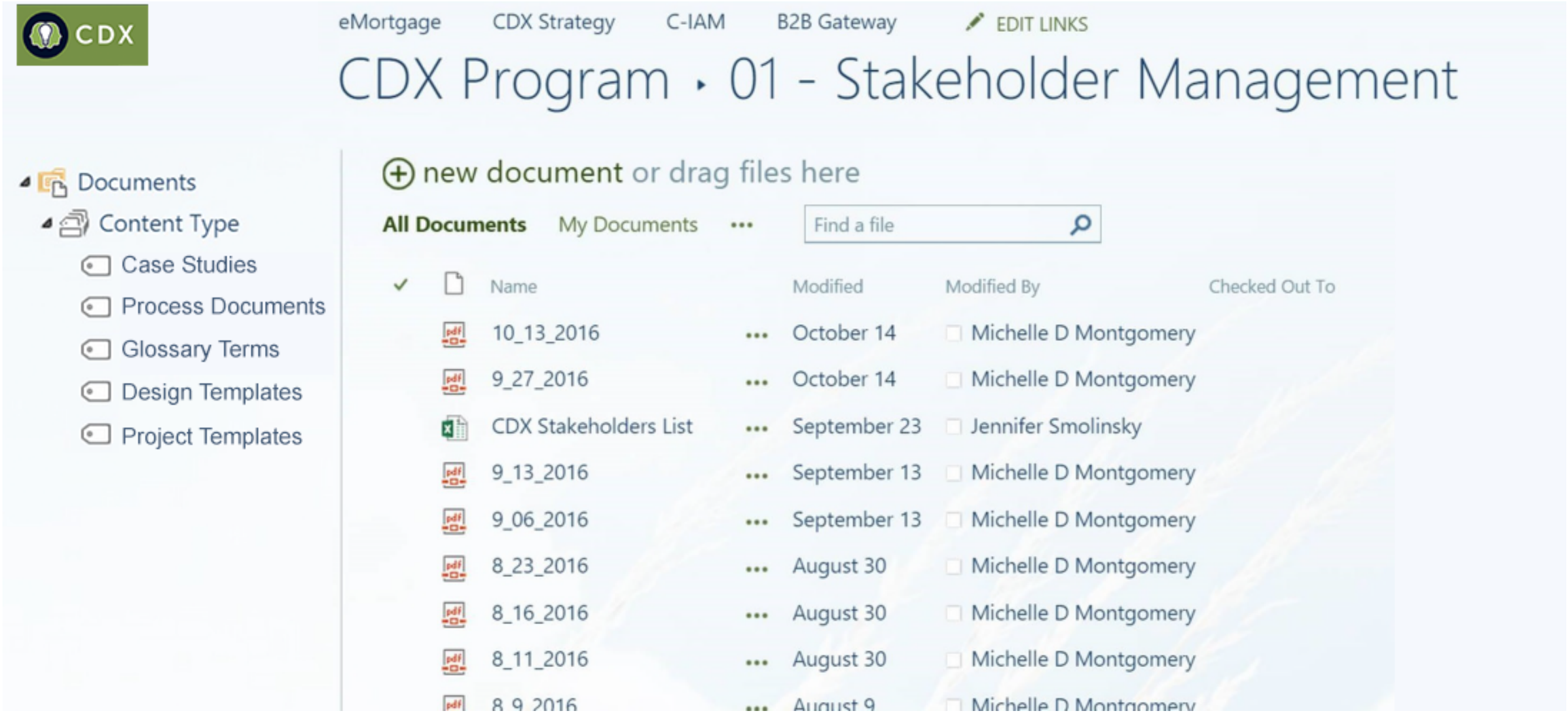
# Intake Workflow Process

## CDX Intake Workflow Process

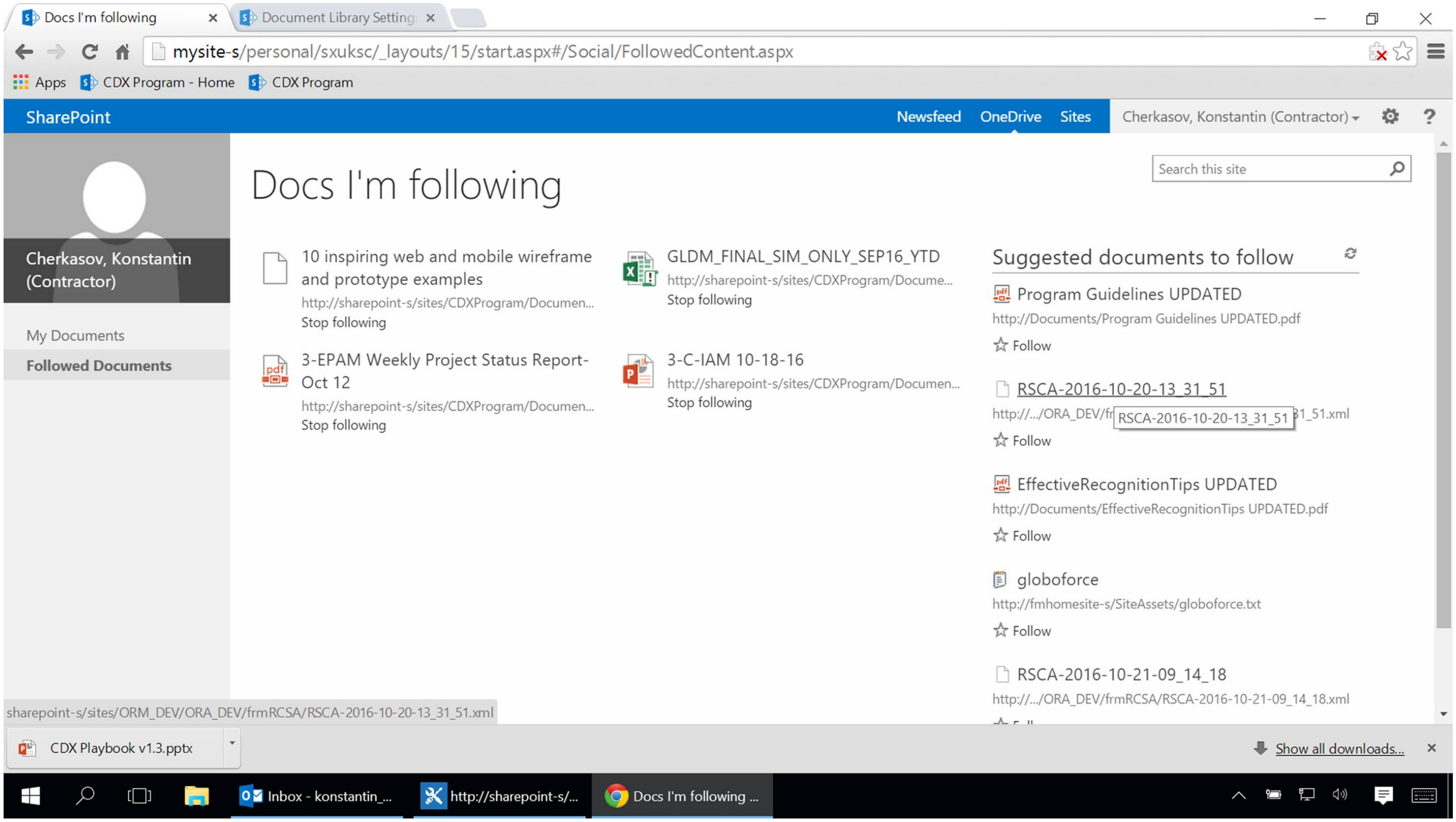
The diagram below illustrates the general workflow to create a repoire with the customer to gain some efficiencies for the engagement process.



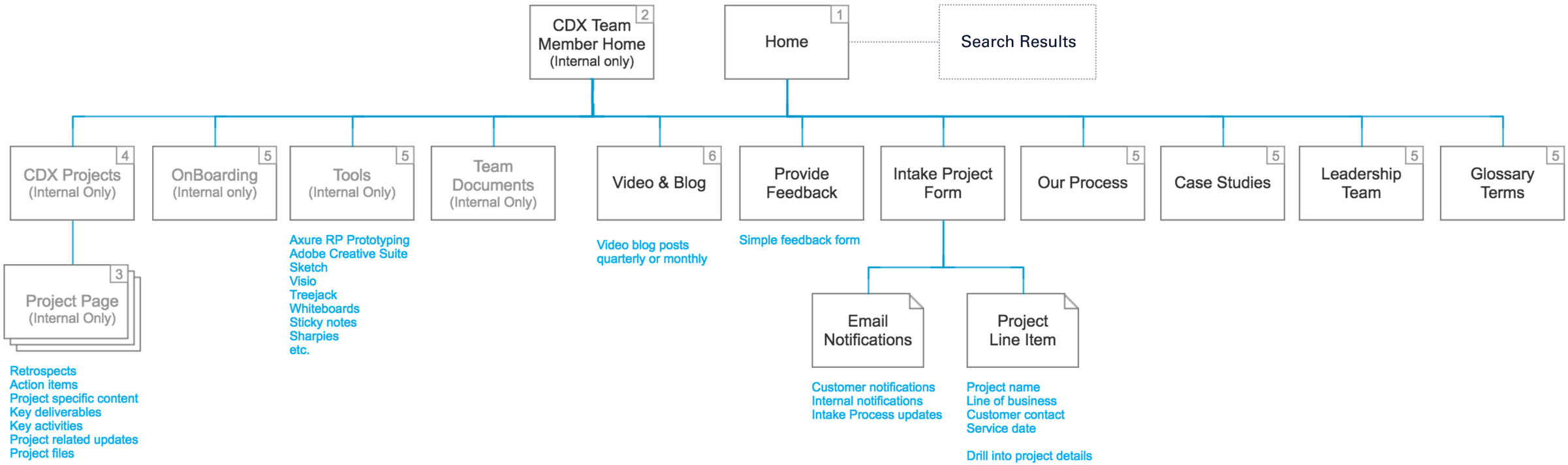
# Example of File Library View



# Example of My Favorite Docs View



# Site Map

**Identified Page Templates**

- Home Page (CDX Customer and Potential Customer)
- CDX Team Internal Dashboard
- Projects Page
- Projects List Page
- Standard Content Page
- Video & Blogs
- Search & Search Results