

Client

PC Link Demo

Interaction Design

Client:	Client
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This document illustrates the interaction design including site map and wire frames that are used to help facilitate dialogue and understanding between RGA and stakeholders. This document attempts to clarify concepts for creating interactive learning modules for Client. This is a working document for designers and stake holders to use as a reference for outlining the best practices for interactive marketing demos.

Note: Content is for placement only, this is a working document.

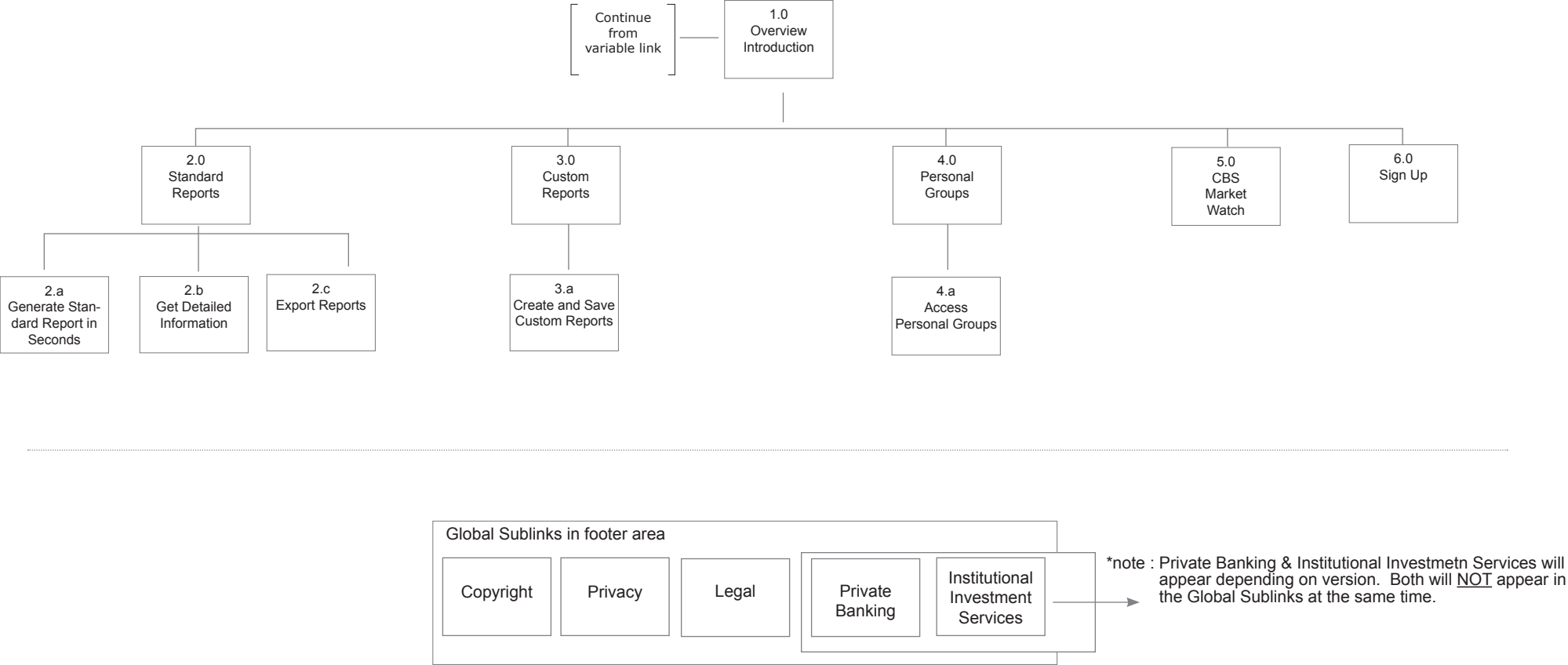
Client's Higher Standard empowers consumers with information and powerful tools to take control of their financial life. The challenge for the consumer is to understand the depth and breadth of products and services such as PC Link. It is RGA's goal to create a demo for consumers that provides a high-level overview and logical flow of navigation and content. Furthermore, we will evolve the visual design into the Higher Standards Brand.

Audience Overview

- 1) Current Private Bank and PC Link customers
- 2) Current Private Bank customer who are NOT PC Link users
- 3) Prospective customers
- 4) CO. Associates and trusted advisors

Streamlined Demo, Higher Standards Brand & Ease of Use

Improved flow, navigation, and content structure allows for ease of use and comprehension of information. RGA has included navigation which gives consumers more control, and easy access to topics and sub topics.



LS1 Flash Loading Screen



[View non-animated version](#)

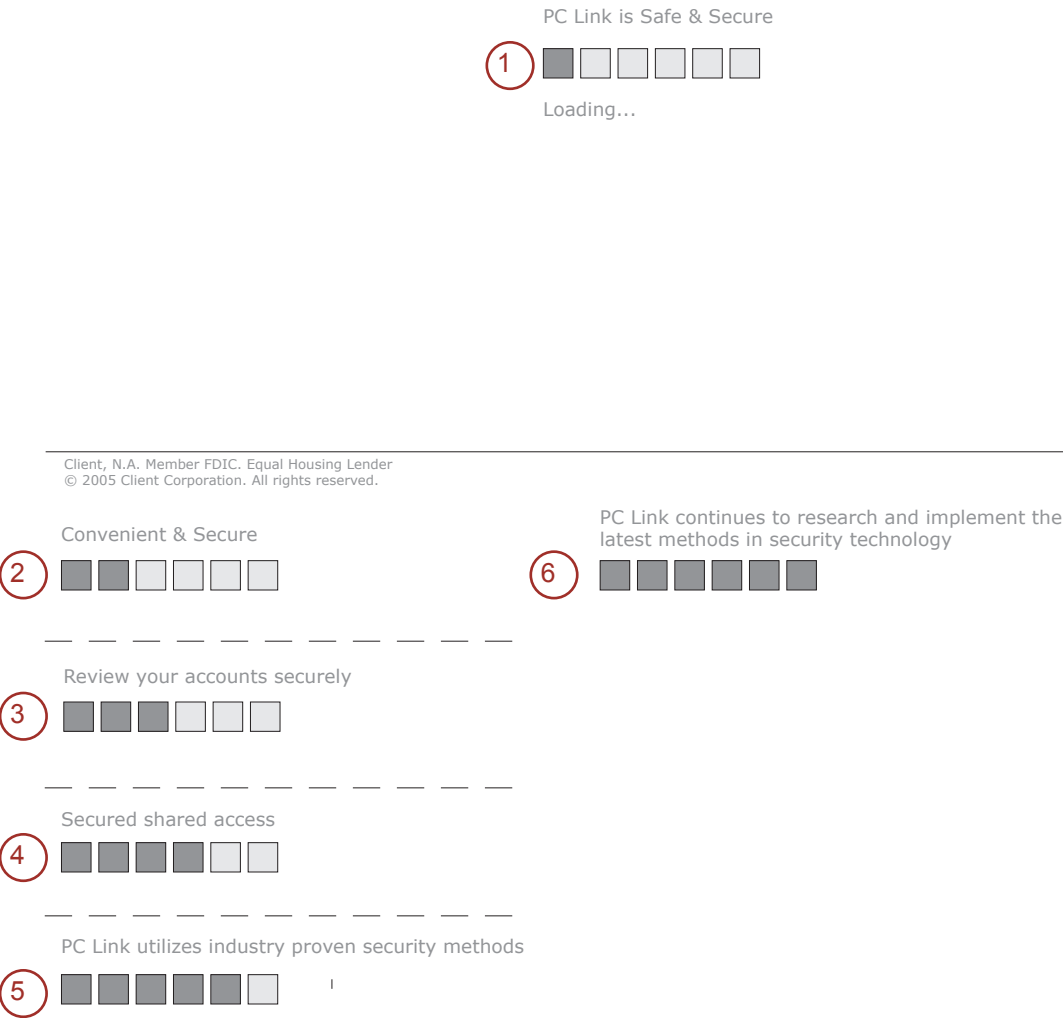
Content

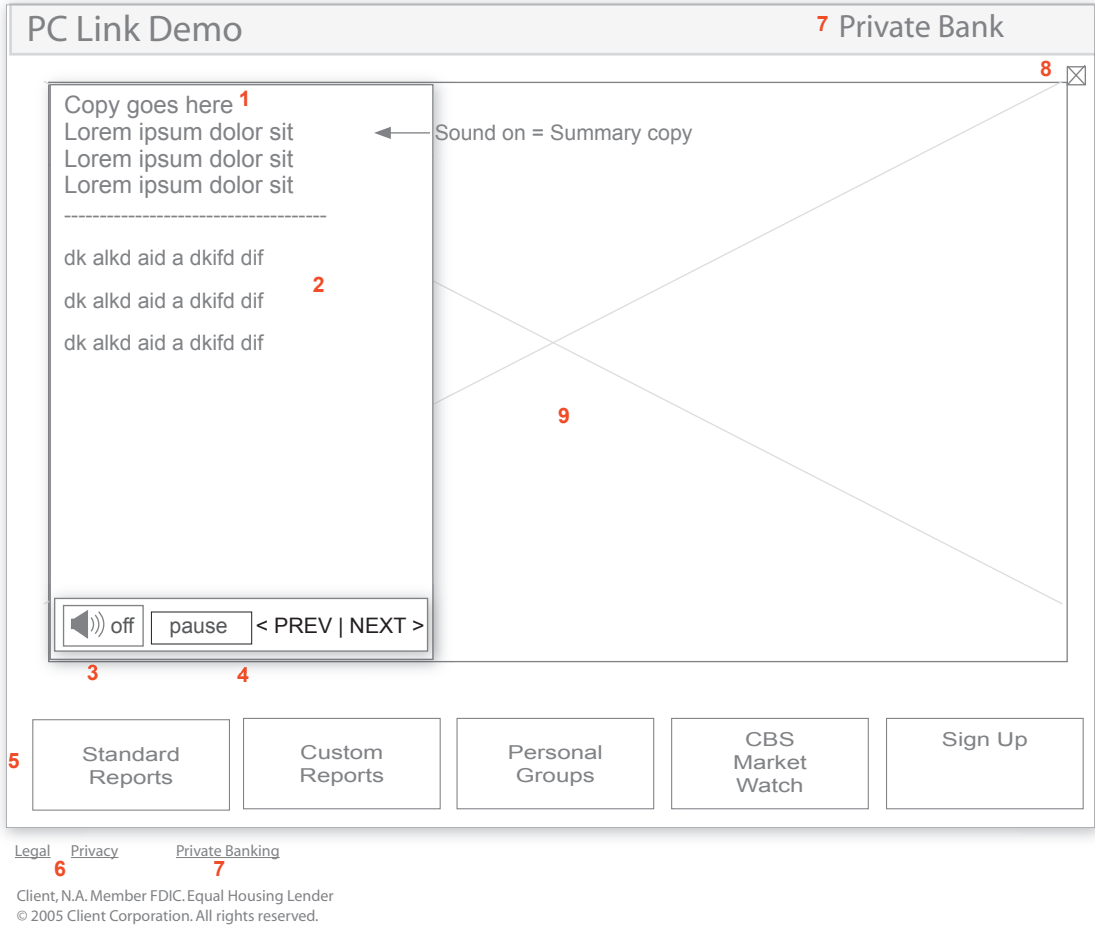
The loading screen will have two links on it:

A close link to close the window, and an opt-out link to go to the HTML version.

The page should show a simple progression of the loading progress to address the potential wait for low-bandwidth users.

As the loading occurs, use visuals to indicate what has loaded and text to highlight the content and benefit of the demo. It will lessen the perceived wait time and provide information on what is to come in the demo.

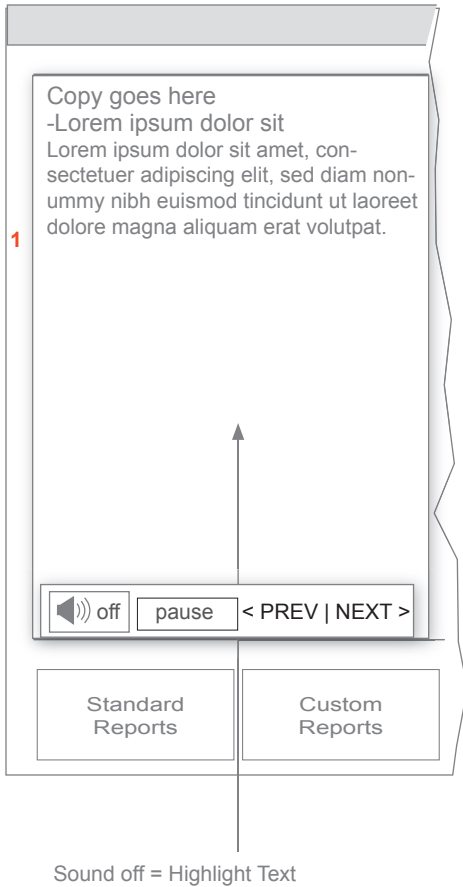




1. "Caption" area contains summary copy when sound is on
2. Highlight Text is located directly below the caption allowing users a view at-a-glance. This Highlight Text will play through automatically, unless the user is manually interacting with the demonstration. If the user is manually interacting with demo using "Previous" and "Next" will take them to the next part of the sequence.
3. "Sound On" = Summary copy (see following page for example of Sound Off)
4. "PAUSE/PREVIOUS/NEXT" allow users to rewind/stop/start within a topic, caption, animation at any given moment. These controls give users the opportunity to be in self-pace mode while viewing/reading content.
5. "Global Topic Navigation" enables users to self-select as well as self-pace themselves. A global button remains highlighted to maintain context until another topic is chosen.
6. "SubLinks" directs users to the parent page in the demo.

TBD, we may want to consider not using interstitials, rather, Link directly to the destination and parent window.
7. "Versioning" in masthead and footer:
NOTE THE WIREFRAME COVERS INSTANCES OF IIS AND PRIVATE BANKING see explanations below.

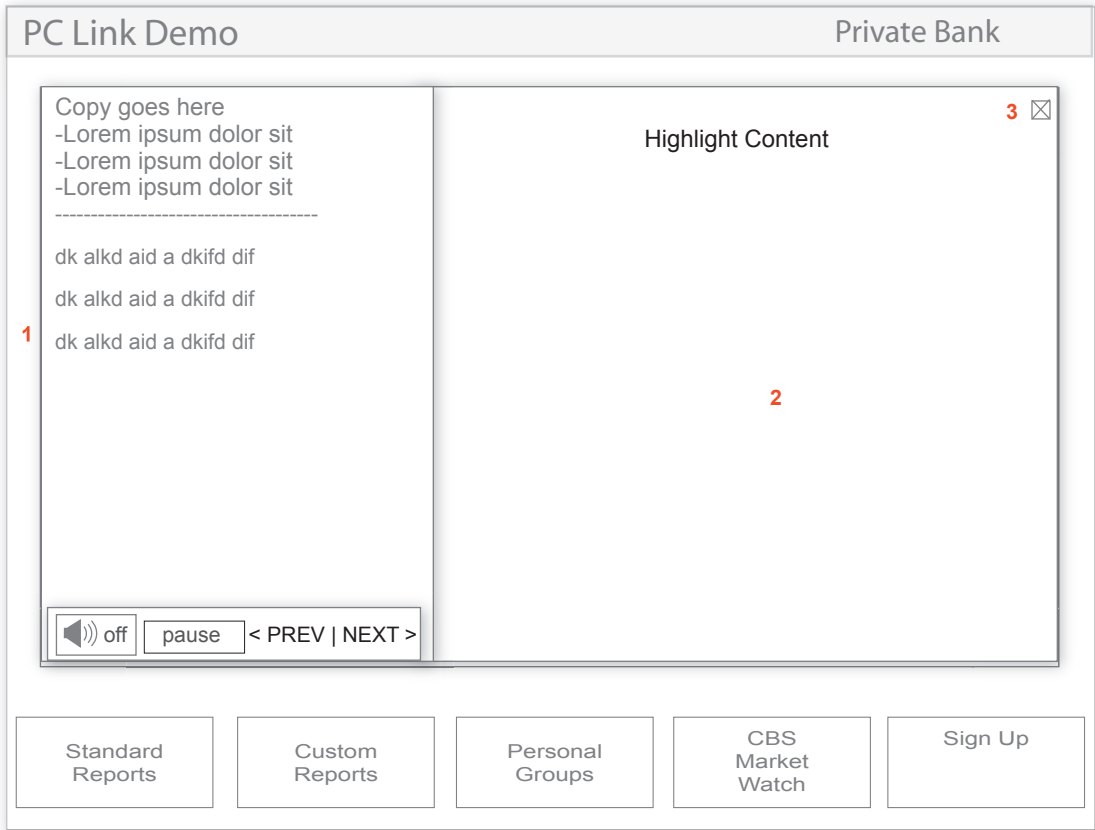
When launched from Private Bank site, PB Logo will exist in the masthead and a Link in the footer. The Private Bank logo will Link to <http://www.bankofamerica.com/privatebank/>
8. "Close Button" will close the demonstration content area, after which the user will shown a "Thank You" message. After the "Thank You" message is shown the demonstration window will close entirely.
9. "Content Area" - all images, screenshots, captions, and animations will occur in this area.



1. "Caption" - When user has Sound On, there's a voice-over with summary copy. This summary copy will be of the General Overview and will be present at all times.

When a user turns Sound Off the copy becomes paraphrased. As the demo proceeds, the paraphrased copy will continue to appear through each subsection.

Refer to Appendix A for alternative concept for accommodating copy in caption window.



1. "Highlight Text" - Highlight Text is a text description of the content appearing in the Content Area. This content will be played automatically unless the user is interacting manually with the demonstration. In the case of the user interacting manually with the demonstration "Previous" and "Next" will take the user to the next part of the sequence. The Highlight Text content may be animate or inanimate
2. Content Area
3. "Close Button"- closes the content window, user will be see with the following message "Thank you for taking the time to explore PC Link." The demonstration window will close entirely after this message.

PC Link Demo

Private Bank

Copy goes here
Lorem ipsum dolor sit
Lorem ipsum dolor sit
Lorem ipsum dolor sit

dk alkd aid a dkifd dif
dk alkd aid a dkifd dif
dk alkd aid a dkifd dif

off

pause

< PREV | NEXT >

Standard Reports

Custom Reports

Personal Groups

CBS Market Watch

Sign Up

[Legal](#)

[Privacy](#)

[Private Banking](#)

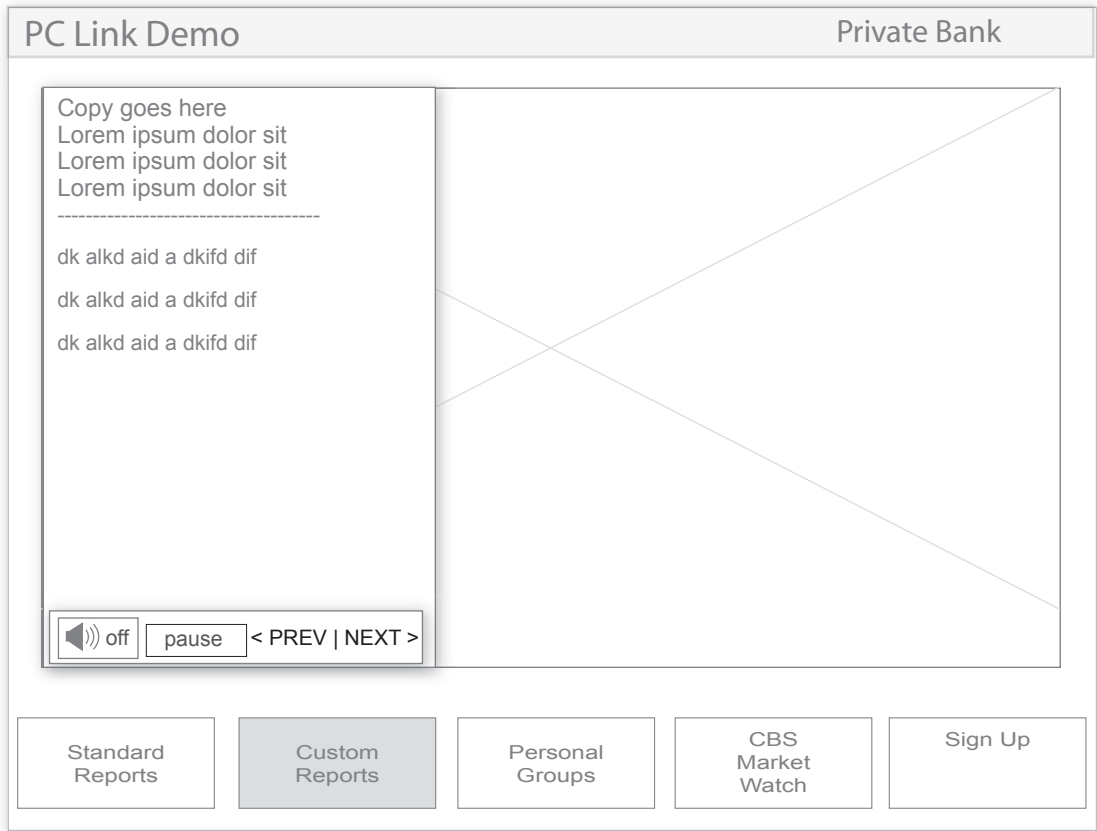
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Goal of Standard Reports:
Standard Reports is designed to meet customer's most common information needs, e.g. general reports such as accounts, assets, capital gains, equity diversification, transactions, etc.

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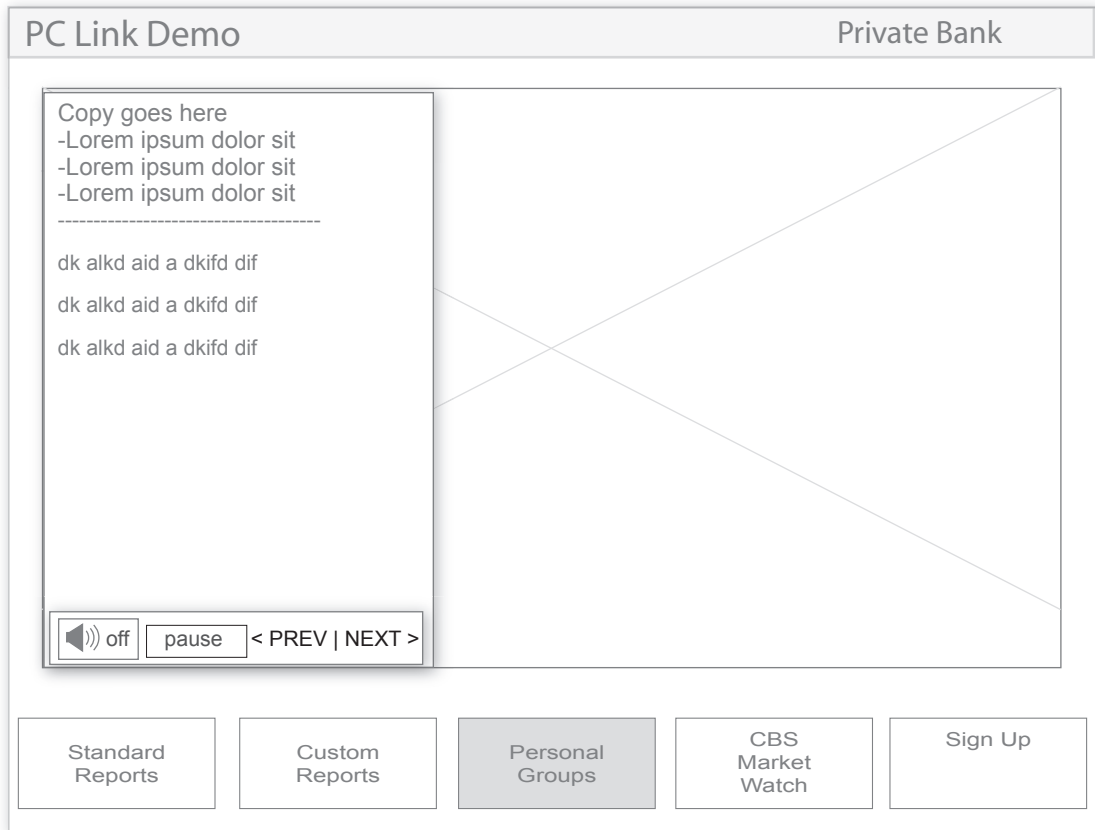
10



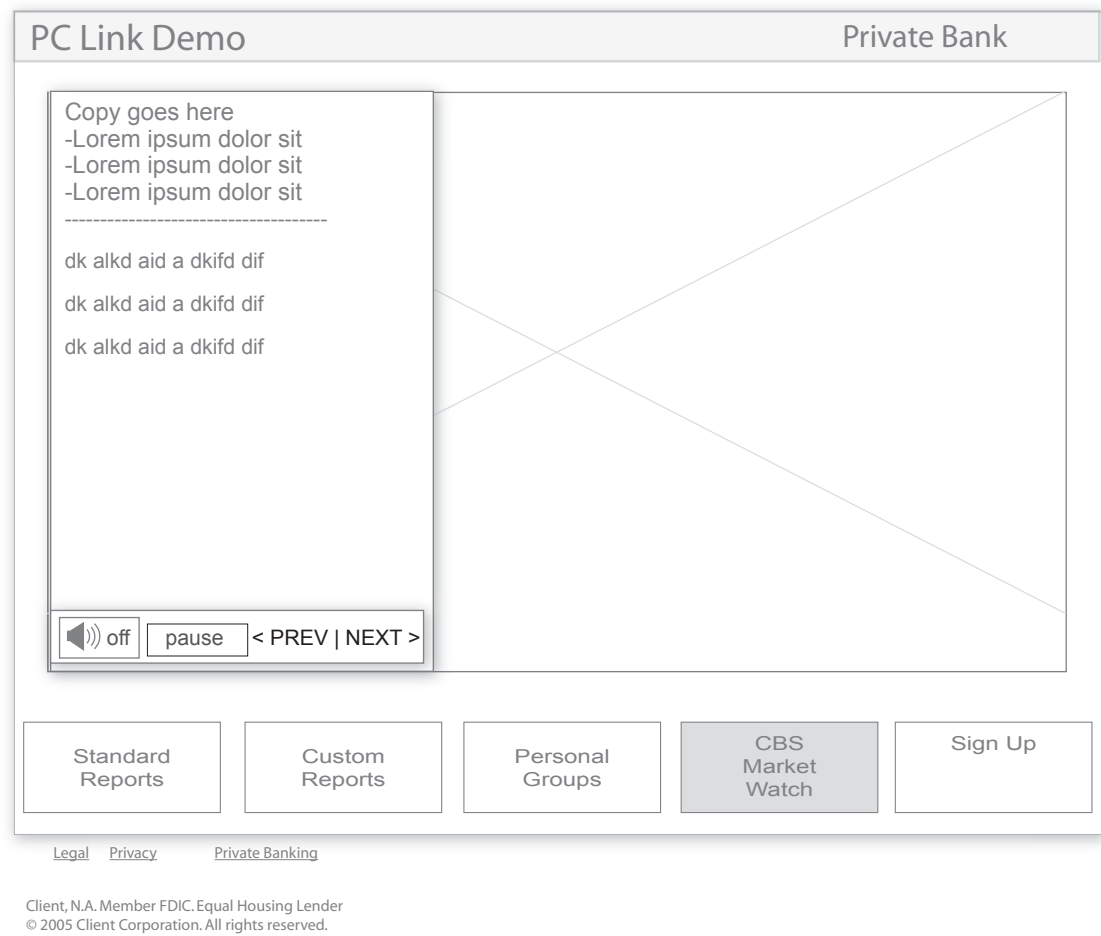
[Legal](#) [Privacy](#) [Private Banking](#)

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Goal of Custom Reports:
Custom Reports is designed to meet customer's unique needs. Users are able to create and save an array of data options, as well as, filter, select, and sort different reports.



Goal of Personal Groups:
Personal Groups is designed to create groups of combined accounts, as well as, manage those accounts.



Goal of CBS Market Watch:
CBS Market Watch is a full suite of quotes, news, and research designed to quickly and easily review information about holdings, financial markets, and economy information.

PC Link Demo

Private Bank

1

Getting Started Copy Goes Here.

2

Private Bank customers can enroll by contacting their financial advisor.

3

Interested in PB & PC Link, [learn more...](#)

4

Security Tout

5

Single Sign On Tout : contact your Financial Advisor

Standard Reports

Custom Reports

Personal Groups

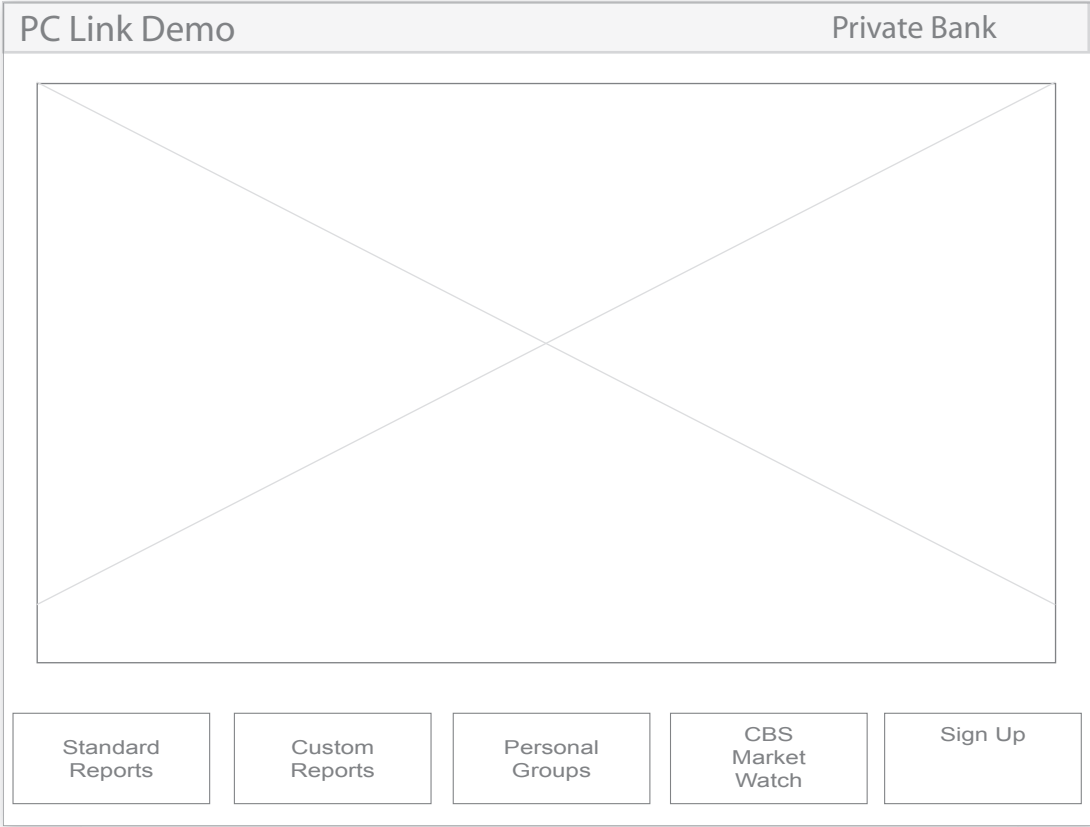
CBS Market Watch

Sign Up

[Legal](#) [Privacy](#) [Private Banking](#)

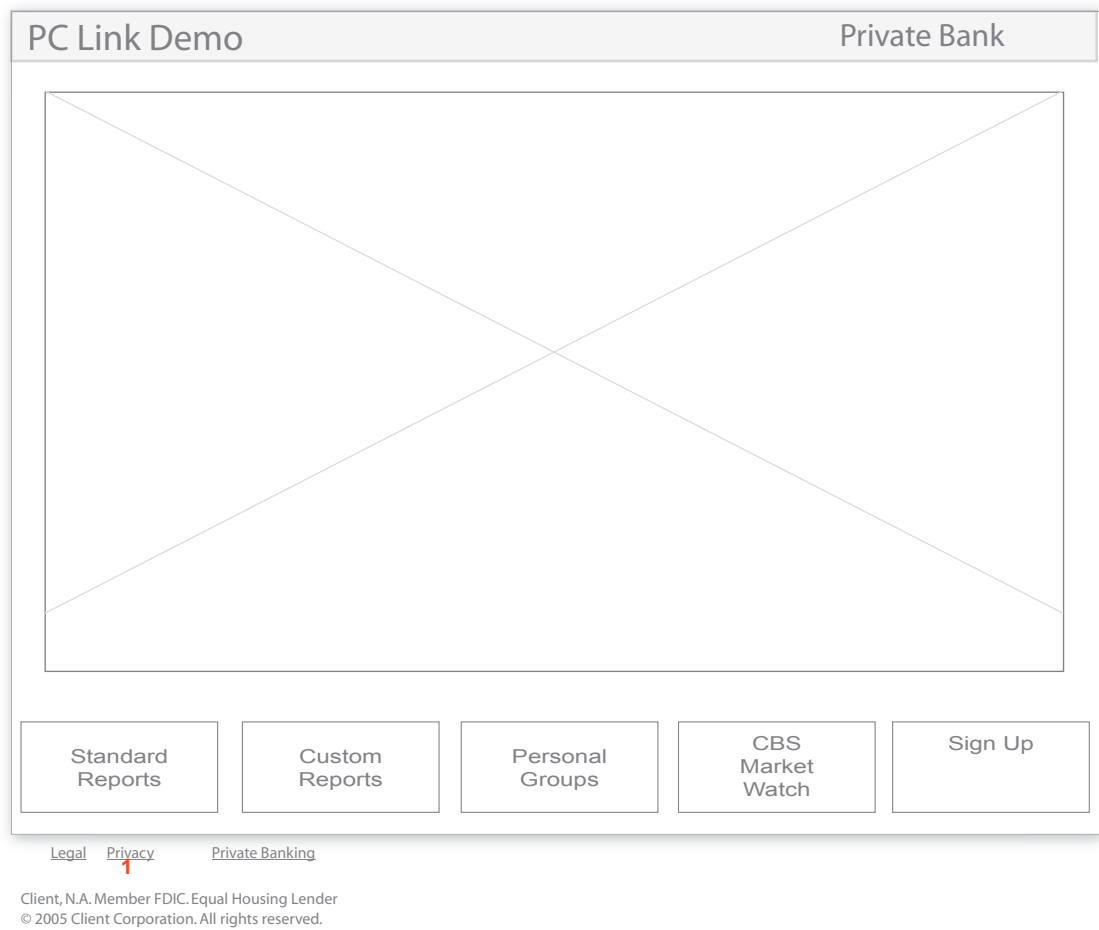
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- 1. Get Started With PC Link copy
- 2. Call to action for PB & IIS customer / non-PC Link user
- 3. Call to action for prospect customers
- 4. Tout call to action for Security
- 5. Tout call to action for Single Sign On

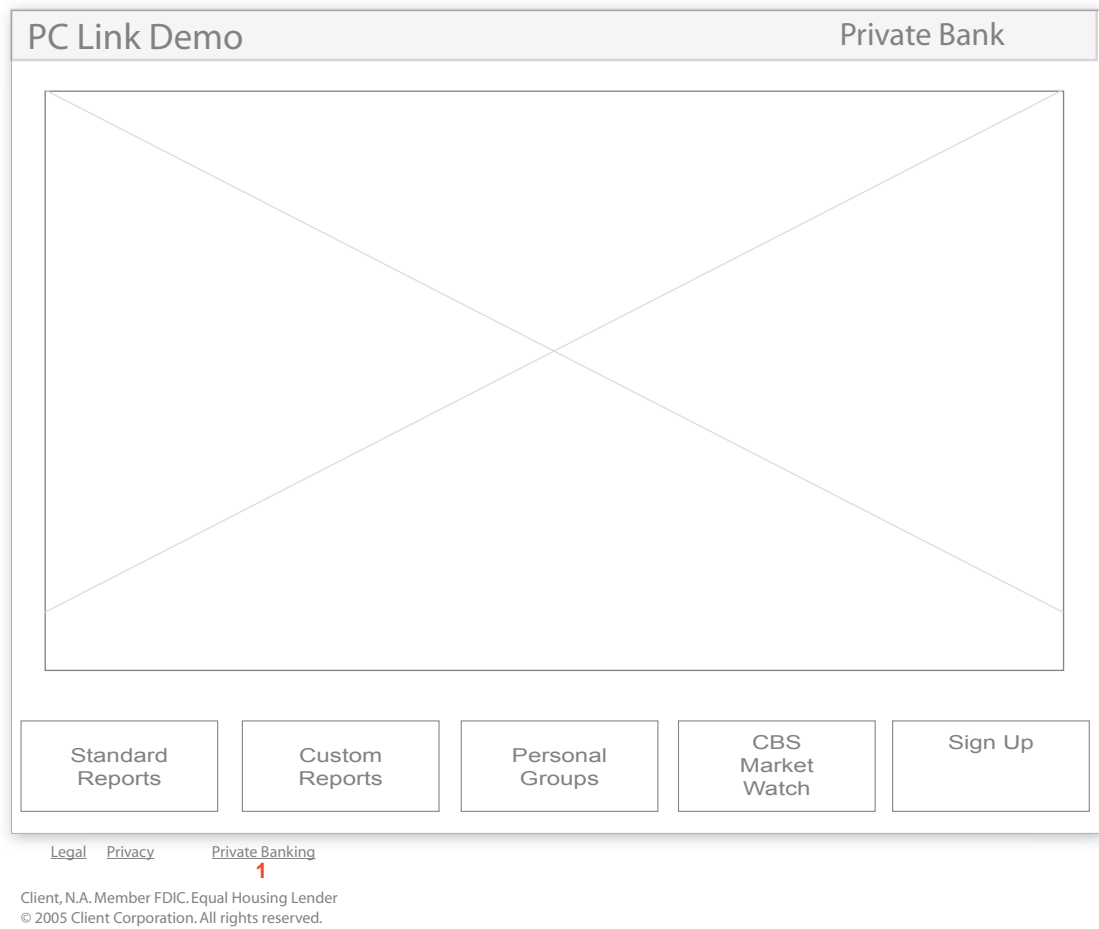


1. Legal link directs users to the parent page in the demo

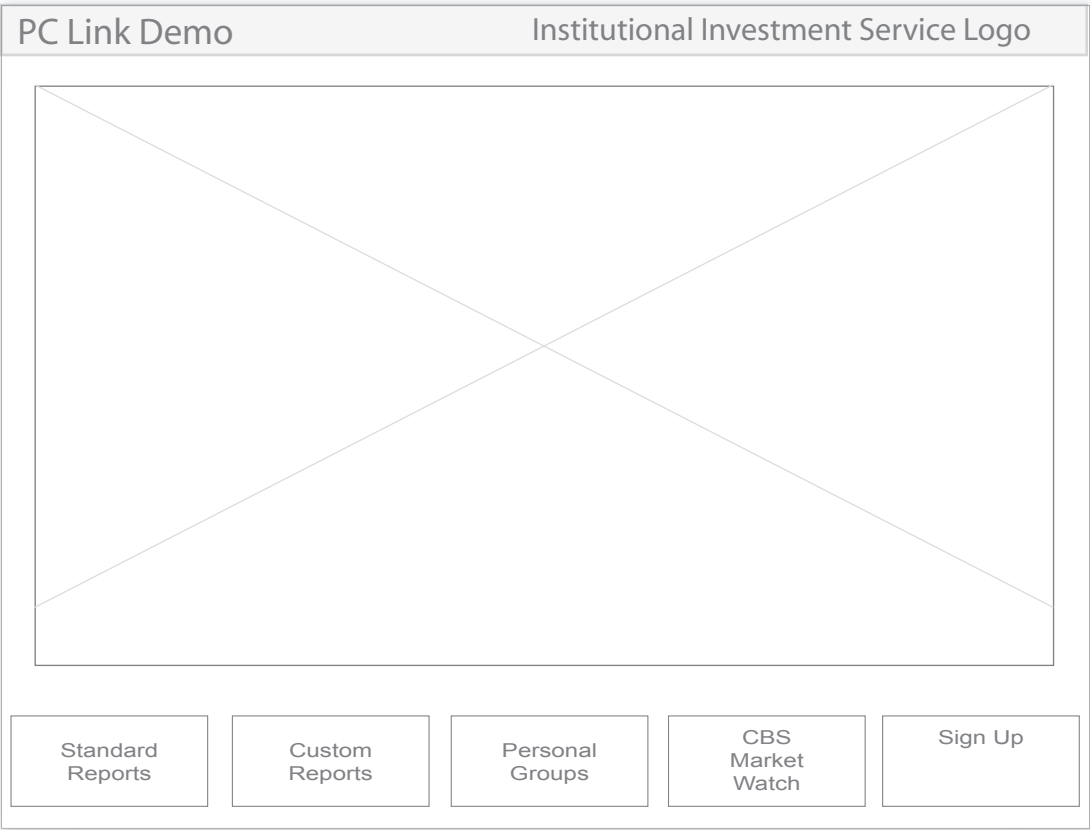
1
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- 1. Privacy link directs users to the parent page in the demo.



1. Private Bank link directs users to the parent page in the demo



- 1. Institutional Investment Service directs users to the parent page in the demo.

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Appendix A

Summarized Caption Window

Copy goes here:

Summary Text 1

Summary Text 2

Summary Text 3

Summary Text 4

Highlight Text A

Highlight Text B

Highlight Text C

Full-bodied Paraphrased Caption Window

Pleff lorem monaq morel plaff
lerom baple merol pliff ipsum
ponaq mipsu ploff pimsu caple
supim pluff sumip.

qonaq issum daple ussum ronaq
ossom fap25 abcde tonaq fghij
gaple klmno vonaq .

1.

The No-box caption concept does not live in an apparent box. There is a bounding box but it is seamless to the user.

The transition between summary copy and full-bodied copy will occur automatically through an auto-transition algorithm.