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A dark blue silhouette of a mountain range with a central peak.
S U M M I T 0 9

**CUSTOMER PORTAL - BRANDING
AND DESIGN BEST PRACTICES**

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Agenda

- ▶ Why are you here?
- ▶ Problems we are solving
- ▶ What is the Customer Portal Framework?
- ▶ What are the Customer Portal Reference Implementations?
- ▶ Lets play nice together
- ▶ What can be done with Customer Portal?
- ▶ Best practices
- ▶ Questions

Why are you here?

- ▶ Supporting and maintaining your brand across your entire web presence
- ▶ Using your existing staff skills and resources
- ▶ Using industry standard tools, technologies, and frameworks
- ▶ Lowering cost of implementation, upgrading, and maintenance
- ▶ Creating an optimal website design for users

Problems we are solving

- ▶ Being able to quickly brand and rebrand the customer experience
- ▶ Removing Legacy systems and web coding practices
- ▶ Using current staff organization to complete projects
- ▶ Allowing to test and deploy new interaction types
- ▶ Meeting accessibility compliance
- ▶ Ability to "upgrade" without some type of impact to current website
- ▶ The use of proprietary systems and technology

What is the Customer Portal Framework?

- ▶ Customer Portal is a complete web application framework
 - Which allows for a completely branded experience and rich media flexibility
- ▶ Uses Open Standards
 - WebDAV
 - HTML, CSS, JavaScript, PHP
- ▶ Adobe Dreamweaver integration for website design
 - Can use other web design tools that run on Microsoft Windows or Mac OS

What are Customer Portal Reference Implementations?

Customer Portal has 2 reference implementations.

- ▶ CP Release Aug '08 to Aug '09
 - Look and feel of previous classic framework of Nov '07 (blue)
- ▶ CP Release Nov '09
 - Follows accessibility compliance
 - Usability Testing
 - Accessibility Testing

CP Release Aug '08 to Aug '09

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CP Release Nov '09

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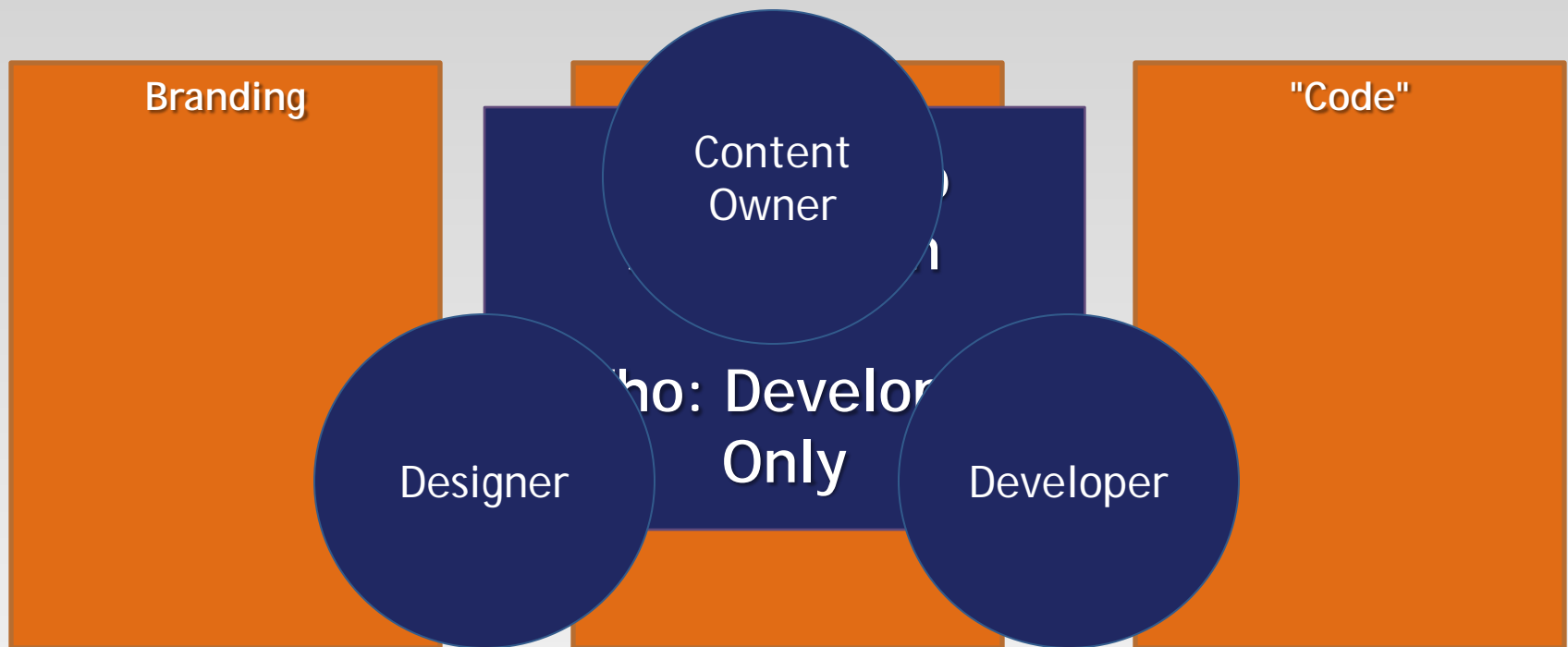


Give Feedback

How can we make this site more useful for you?

Let's play nice together

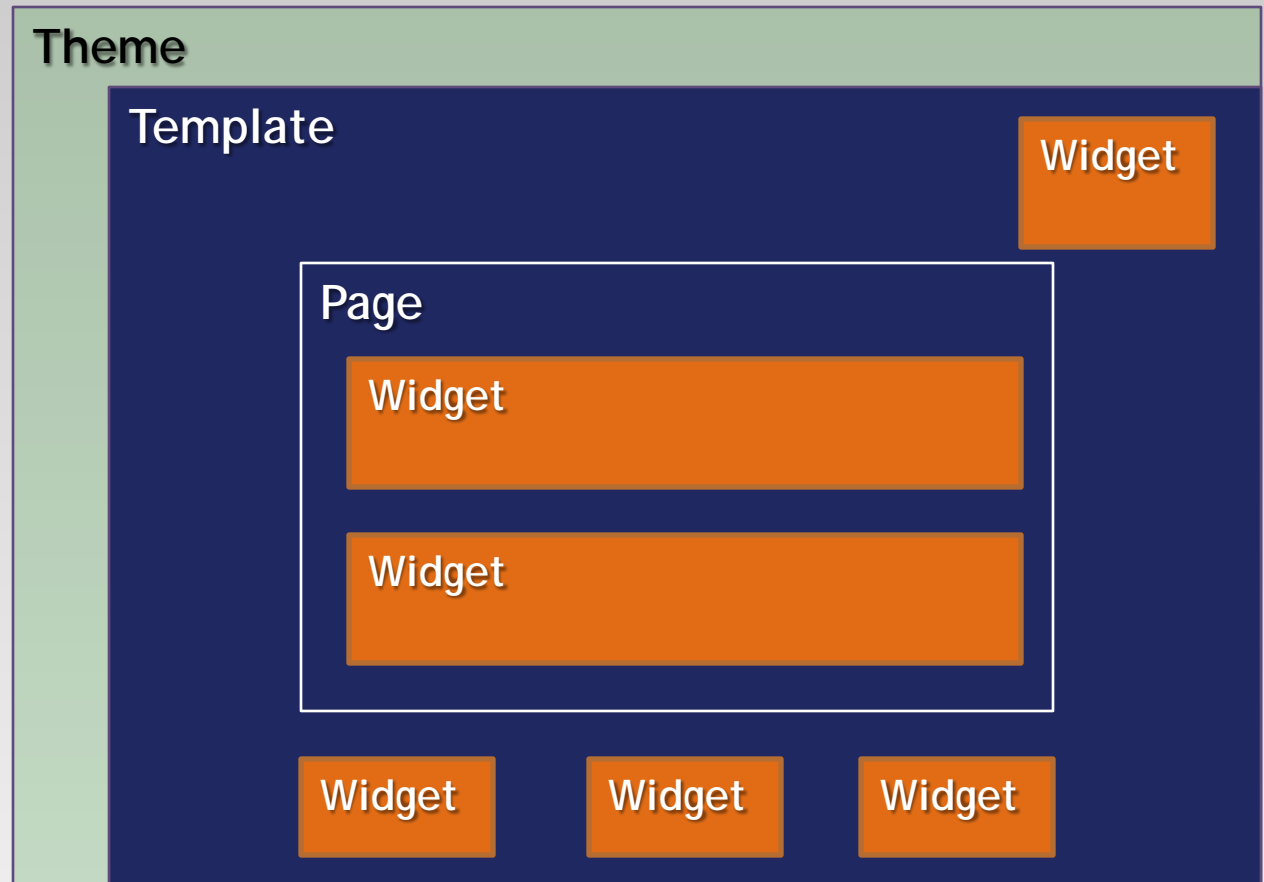
- ▶ Traditional websites have been far too technical and require a "developer" to make changes. Customer Portal provides the tools and framework to support the entire web branding process and people.



Customer Portal Components

► So what makes a "web page"?

- Themes
- Templates
- Pages
- Widgets
- Assets



Some New Items for November '09 Release

- ▶ Improved CSS layout and design
- ▶ Simplified widgets, pages, and templates
- ▶ Themes: utilized for quick assets management and branding
- ▶ Conditions - simple logic for enabling/disabling HTML sections on the page
- ▶ An additional reference implementation meets accessibility compliance

Lets take a closer look at Customer Portal for Nov '09

So What are Some Best Practices?

- ▶ **The 3 Levels of Branding within Customer Portal**
 - Simple: Corporate logo, basic color change, and Themes
 - Moderate: Corporate brand, logo, and full CSS changes
 - Advanced: Same as above with custom widgets, new pages, templates, and themes
- ▶ Do not recommend creating custom widgets for your first implementation of Customer Portal
- ▶ Plan more time if addressing accessibility requirements

Here are Some of Our Best Practices

- ▶ Identify the people coming to your site (i.e. identify your "persona").
- ▶ Research the requirements of the persona you have identified.
- ▶ Build clear use cases with regards to their expected behaviors and actions.
- ▶ Iterate your design with real people using it.
- ▶ From our studies we find the below the most common
 - Find Information
 - By Browsing
 - By Searching
 - Get Help
 - Verbally vs. Textually
 - synchronous vs. asynchronous

Let's Take a Look at Some Examples

▶ Level 1

- [J&P Cycles](#)
- [Buhl](#)

▶ Level 2

- [tele.ring](#)
- [Slacker Personal Radio](#)
- [Tivo](#)

▶ Level 3

- [Nikon \(Europe\)](#)
- [FreeRealms \(Sony Online Entertainment\)](#)
- [Netgear](#)
- [myspace](#)

Best Practices of Upgrading

- ▶ Upgrading from Classic or Nov '07
 - If you are upgrading from Classic, we recommend starting with the reference implementation and plan your corporate rebrand of the web pages. Do not try to carry over classic look-and-feel and customizations

- ▶ Updating from previous Customer Portal release
 - Your current branded site will continue to work as you expect
 - We have updated the framework and introduced a second reference implementation

Project Planning Best Practices

- ▶ Decide how far you want to take your design (3 options).
- ▶ The toughest part is what you want your design to be. Determine what other groups need to be involved.
- ▶ Leave room for design iterations (at least 2 but no more than 3).
- ▶ Are you planning usability study?
- ▶ Are you planning to accommodate accessibility in your project?

Additional Resources

- ▶ To keep up with all the latest Customer Portal for discussions and documentation go to the following locations:
- ▶ Customer Community
 - <http://customer.rightnow.com/>
- ▶ Developer Community
 - <http://customer.rightnow.com/developer>

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QUESTIONS

