

Case study

Client: John Smith

Technology: .NET, SQL, Silverlight, Flash, Java, Ajax, XML

Goals:

When John came to us, New Company Fiscal was starting from a blank slate. They wanted to provide their customers with a way to get out of debt and achieve financial freedom through their nine-step on-line program. They wanted to do this in a way that would relieve their customers' stress and maintain confidentiality by providing an on-line experience that wouldn't overwhelm them with irrelevant or obsolete data. Instead, it would provide them with real-time information about their financial progress and encourage them to continue with the program rather than falling into the trap of "surf in, register and forget".

Solution:

We saw that what John needed was a highly interactive web site design that was both user-friendly and included tools to provide customers with the relevant, up-to-the-second information that they needed to track their financial recovery and make informed decisions. Within three months, we developed a site that uses .NET framework to seamlessly integrate Yodlee, the world's largest bank data aggregator, drawing on 100,000 account types at 11,000 financial sources, to securely and efficiently gather information from the customer's bank accounts and present them with a summary and analysis of their current financial situation in real time. With the analytical powers of CalcXML to help the customers interpret the data, we used Microsoft's Silverlight visualization and advanced data integration capabilities to present the results in an interactive animation experience that is simple and intuitive to use; giving the customers only the information relevant to their needs at their particular stage of financial recovery.

In addition, we added a feature that requires that before customers begin they must obtain an introductory packet of information about the site from their financial agent that includes their user name and password. This way, customers are assured that they have been briefed on the nature of the site and its tools before first logging in, so on their very first visit they are ready to go with the minimum of confusion and the maximum of motivation to use the financial recovery program to its full potential.

Because John was starting from scratch, we also provided him with branding services and developed marketing materials such as brochures, postcards and fliers, thus ensuring a consistent identity and presence for New Company Fiscal as it went forward.

Key Features:

We provided a clean, modern design that is simple and intuitive. It is easy to navigate and only relevant information is presented in a manner designed not to overwhelm the customer. We

used **Silverlight** to generate interactive animation graphics, **CalcXML** for data analysis, and **Yodlee's** data aggregation strengths as well as **.NET**. We also ensured customer familiarity with the site's purpose and strengths by keeping the customer's financial agent in the loop as the provider of introductory information and log-in materials. And finally, we provided branding and marketing services.