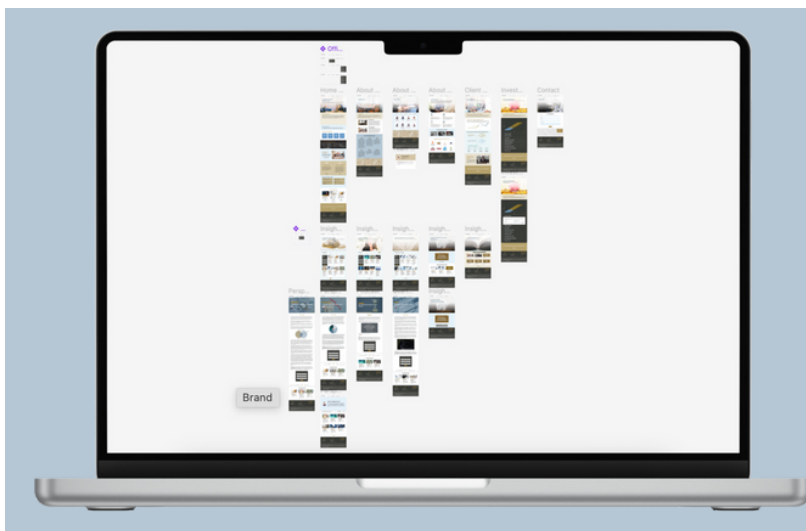# Website Redesign

Team Crawford

Lauren Buie, Ava Glassen, Marisa Gu,
Shahla Le, & Deborah Yoon
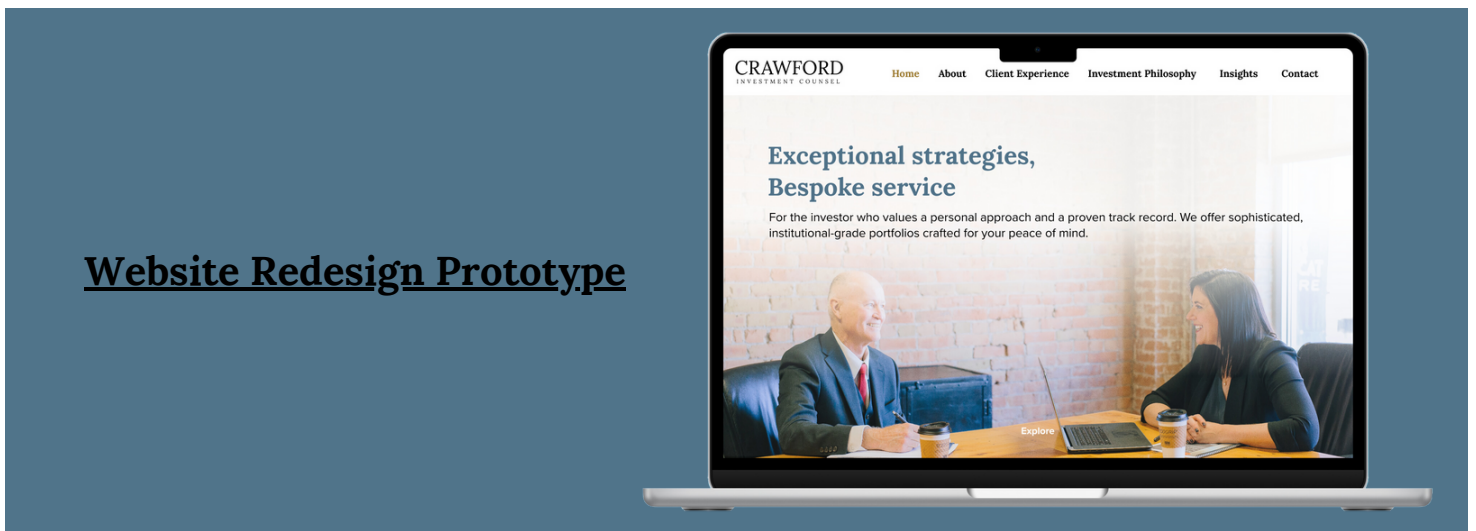
Website Redesign

The website was identified as a channel for Crawford's communication strategy. The main purpose of the website is to inform and engage clients. Current Crawford clients should easily access information on the website and conveniently share content with others. Tying back to our goal of helping Crawford attract the next 100 high-net-worth individuals, the website should also serve as a platform to connect with prospective clients. They should be able to find information to help them choose an investment firm and browse through website content that is engaging and credible.

We started by conducting a website audit of every page on the Individual Investor's side of Crawford's website. Team members noted areas where user experience could be improved. Additionally, we looked at other investment firms' websites for inspiration. Several successful website elements were noted for incorporation in our proposed website redesign.

Based on our audit and inspiration, we built a low-fidelity wireframe and a high-fidelity prototype of a redesigned website on Figma. To address the main goal of improving the communication strategy on the website, we mainly focused on bettering user experience for the website user, modernizing the visual look of the website, and adding easily accessible information.

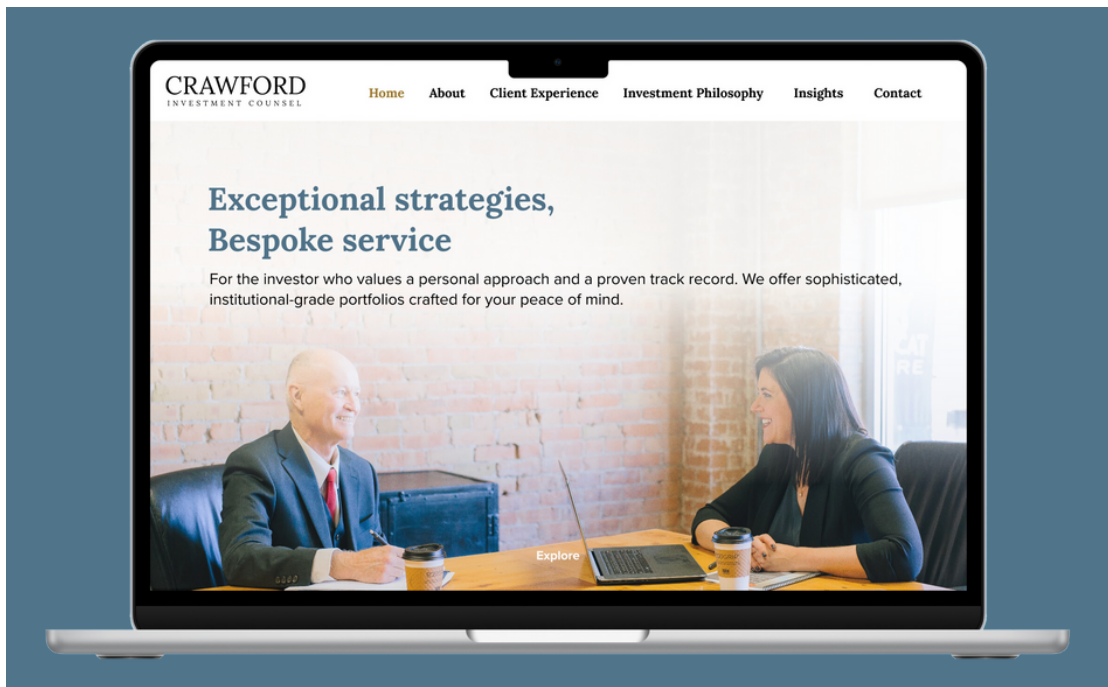**Website Redesign Wireframe**

Website Redesign Prototype

CRAWFORD
INVESTMENT COUNSEL

1   Combining Navigation Bars

There is a new navigation bar that combines the existing two (Individual Investors and Insights). Our new logo is in the corner, the tab names are not all capitalized, the color of the tab the user is on changes, and there is no extra navigation bar on the right side.

2   **Perpetual Accumulation™ Motion Graphic**

As we continued down the home page, we replaced the section featuring a downloadable guide. Instead, two sections now feature a newly designed dynamic Perpetual Accumulation™ graphic and a concise summary of what sets Crawford apart.

3 **Concise Language and Font Adjustments**

We rearranged the numbers in the "Crawford by the Numbers" section.

We made the language more concise by taking out "Since 1980:" and made the font more consistent by changing the body copy to Proxima Nova.
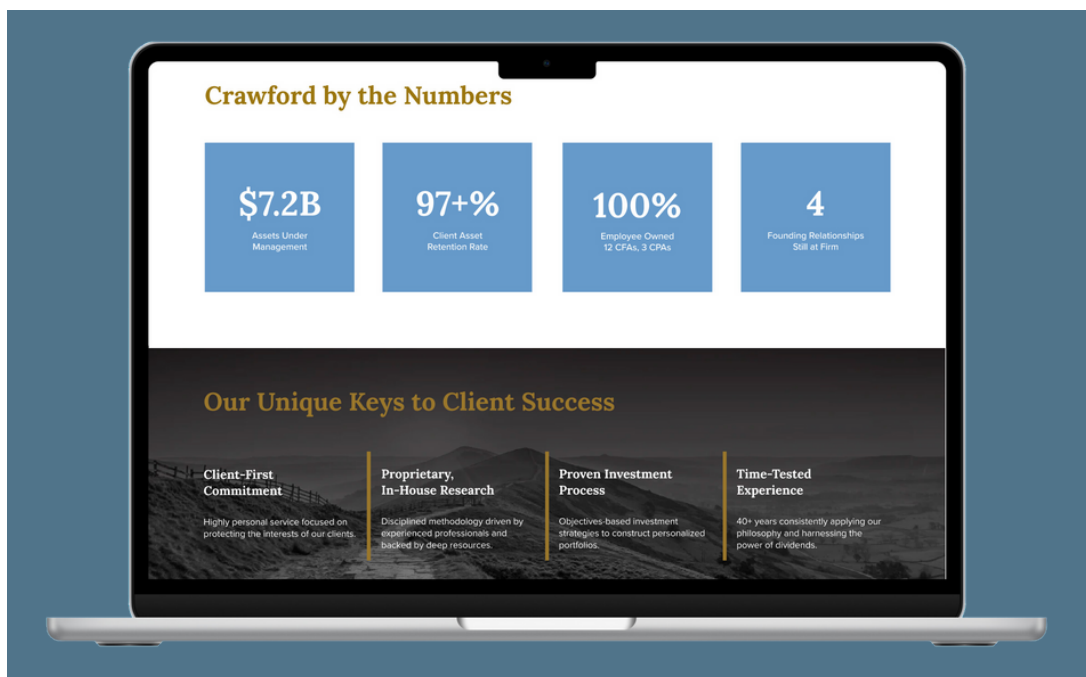
4

Concise Language and Font Adjustments

In "A Message from Our Founder", we made the font more consistent by changing the body copy to Proxima Nova. We simplified the extra copy into a button to declutter the smaller section.
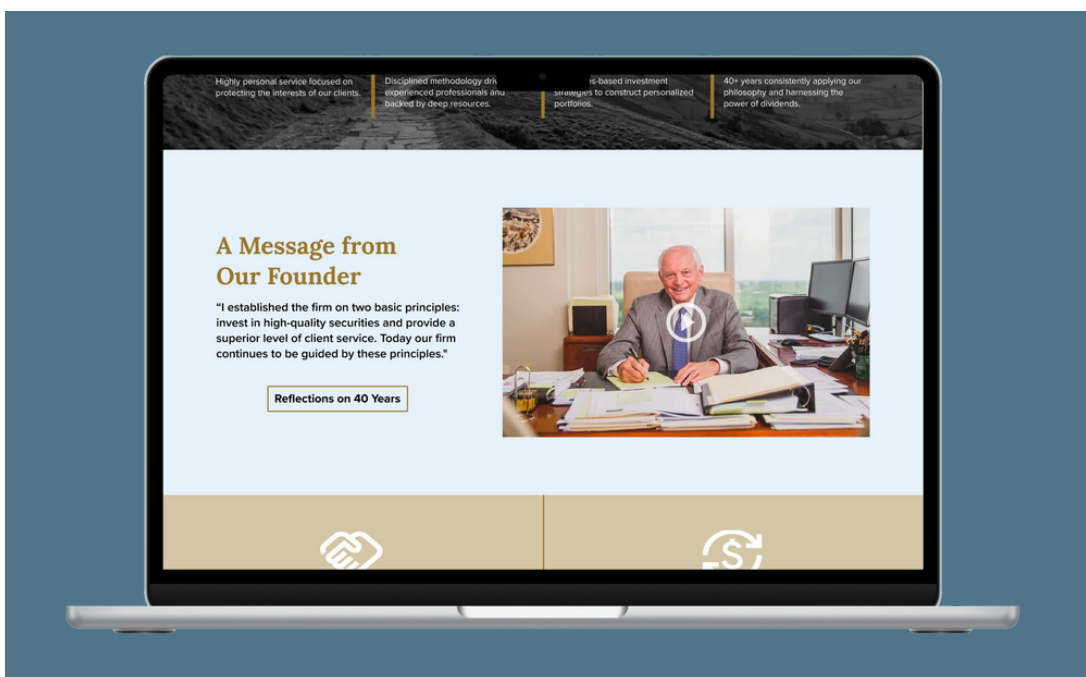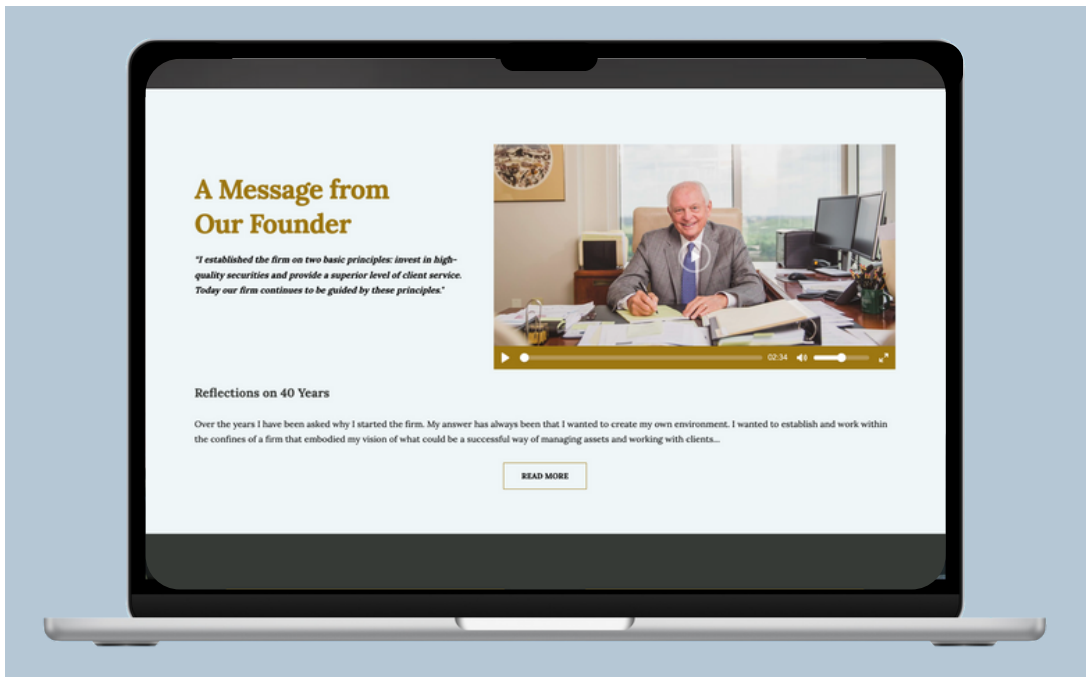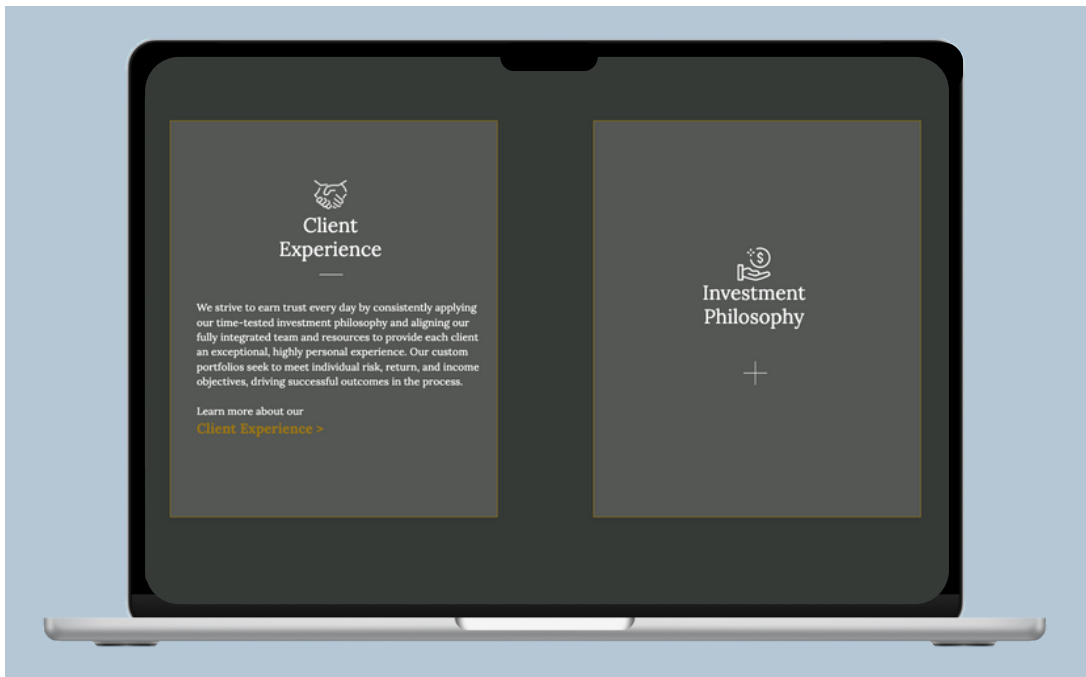
5 Accessible Information

This section's colors were changed and the text is readily available to read instead of making the user click on boxes to access the information. The color of the section was also changed to bring a lighter look to the website.

6   FAQ

We added a FAQ section for users to get the information they are most interested in at a glance.
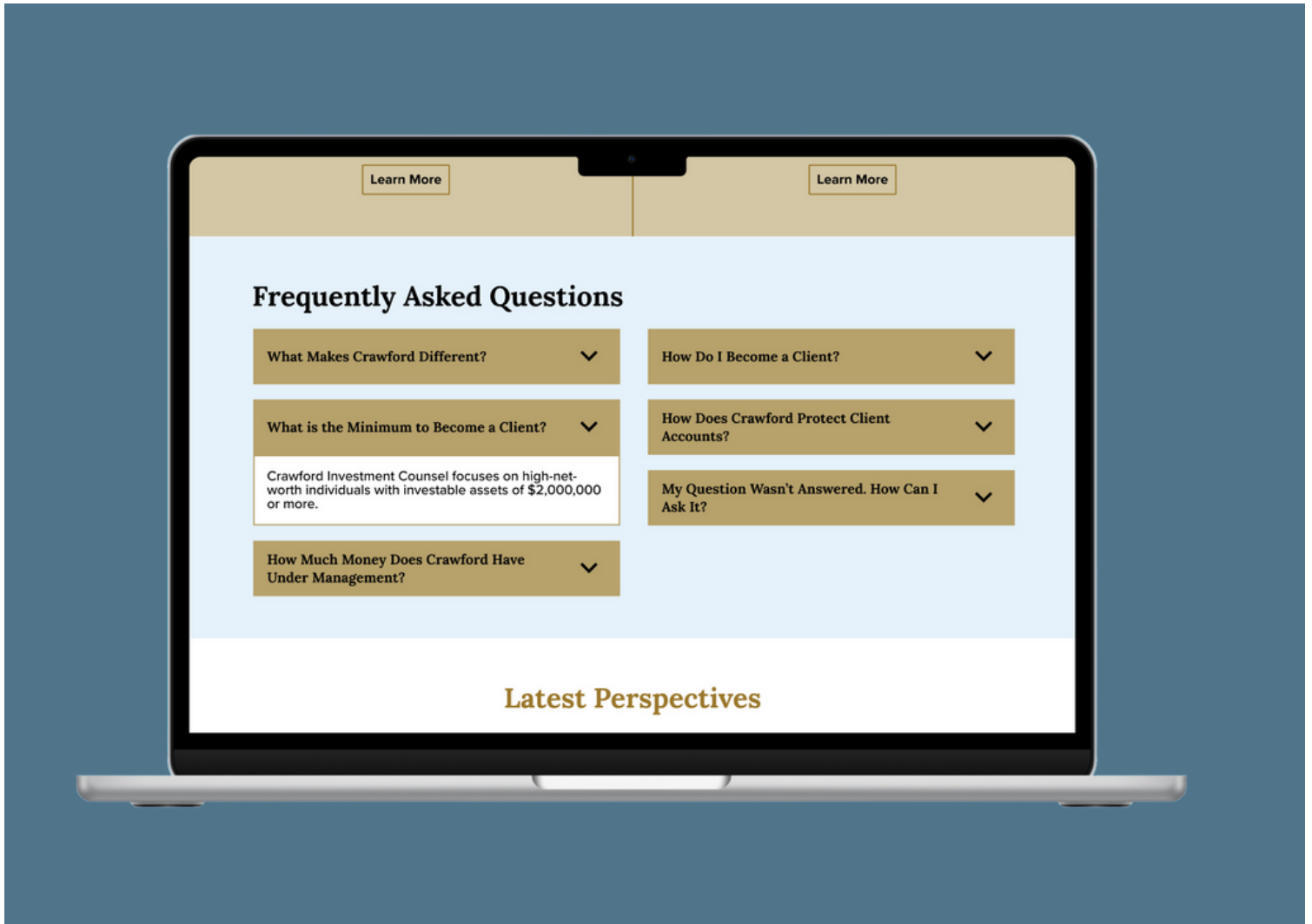
7   Perspectives at a Glance

Instead of the beginning of the Perspectives post blurring, we recommend adding a short blurb summarizing the content for readers to easily digest and preview. The button color was also changed and centered to stand out more.
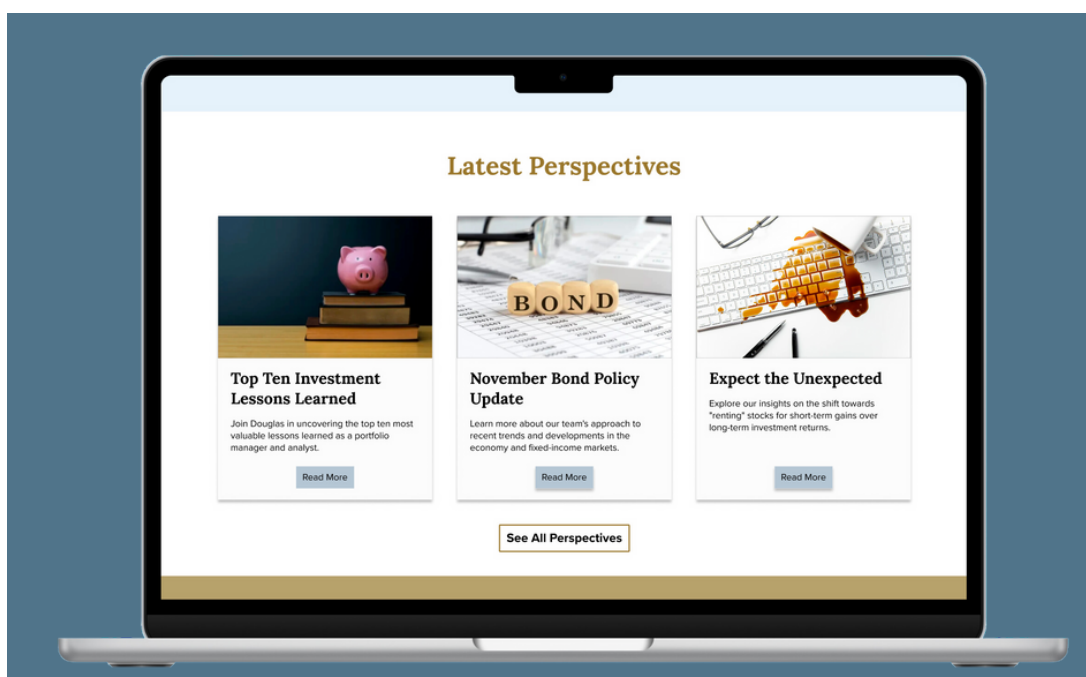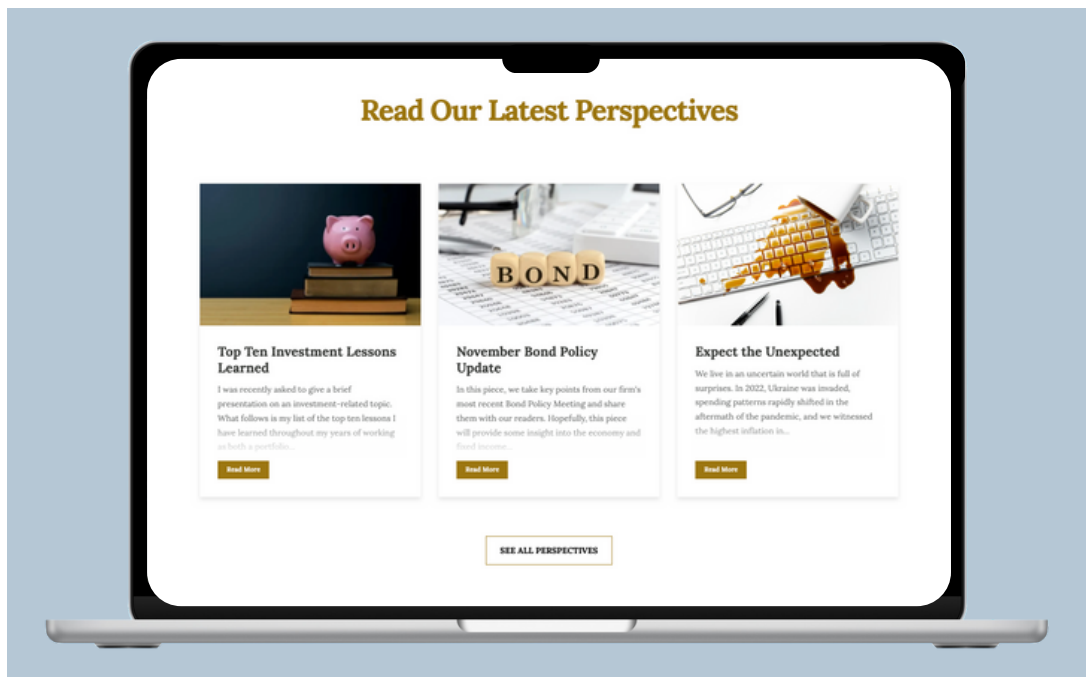
8 Call to Action

The copy was changed for a clearer CTA, and the footer was reorganized and condensed into three different columns with additional icons added for increased accessibility and aesthetics. The color of the CTA section was also changed.
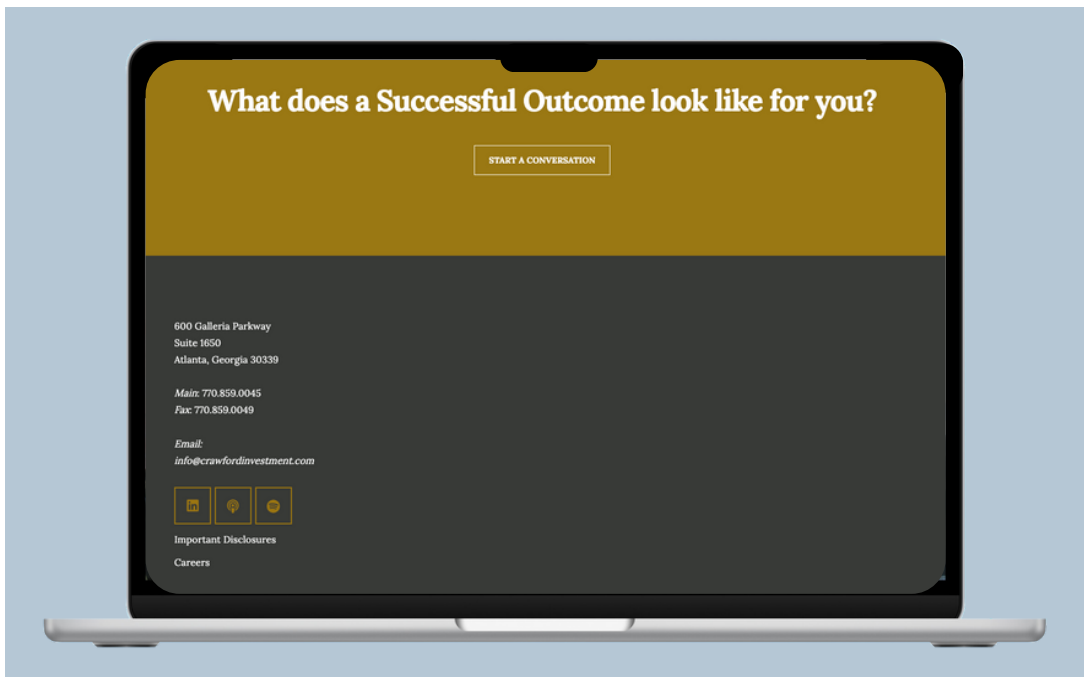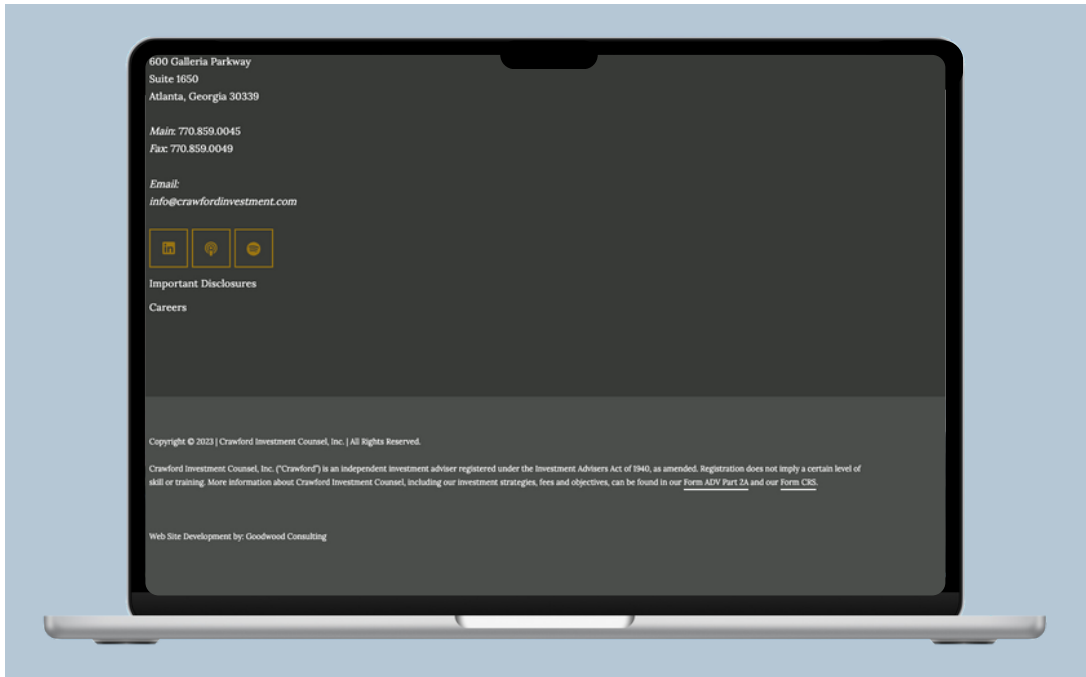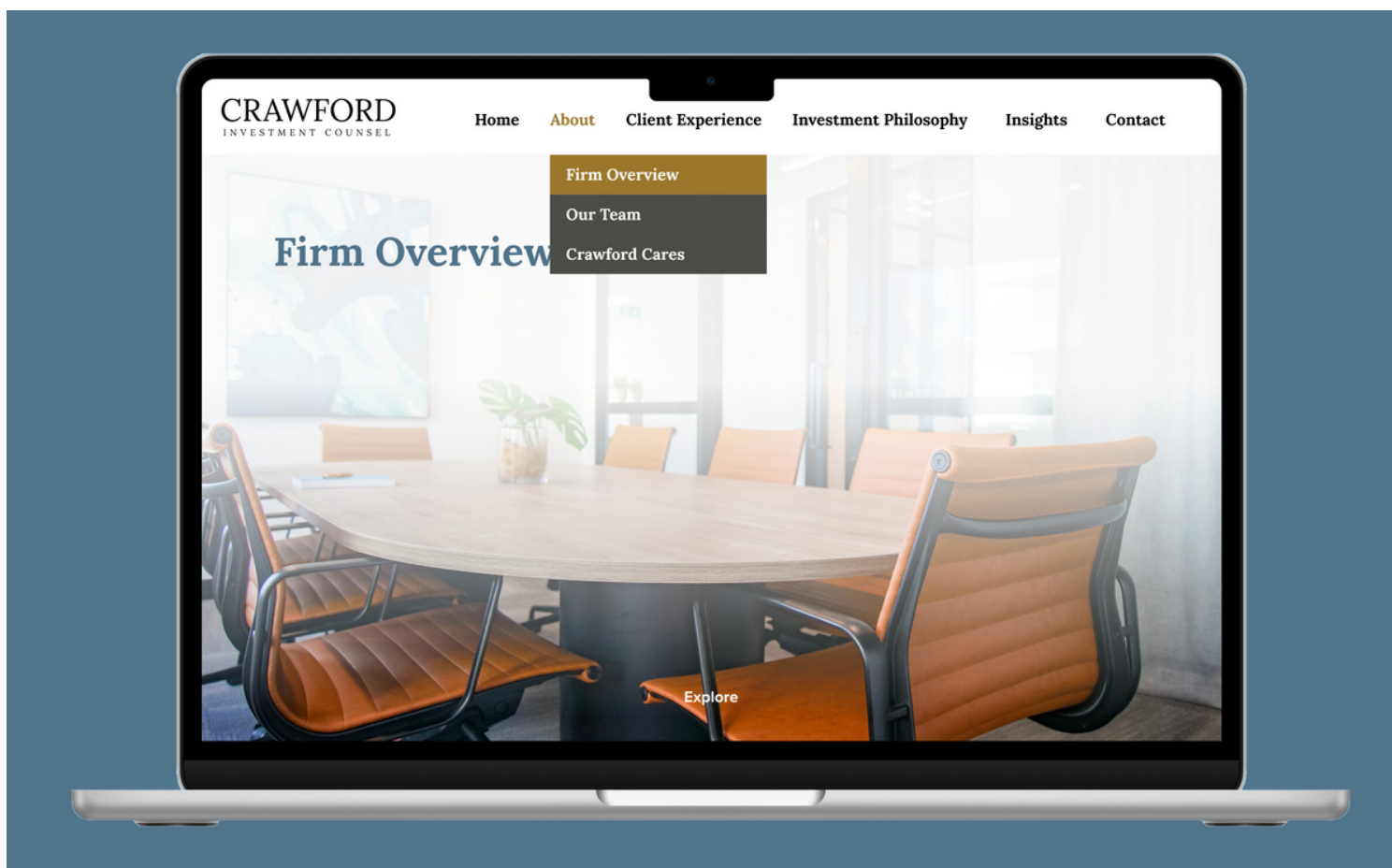
9   **Footer**

The information in the footer was condensed.
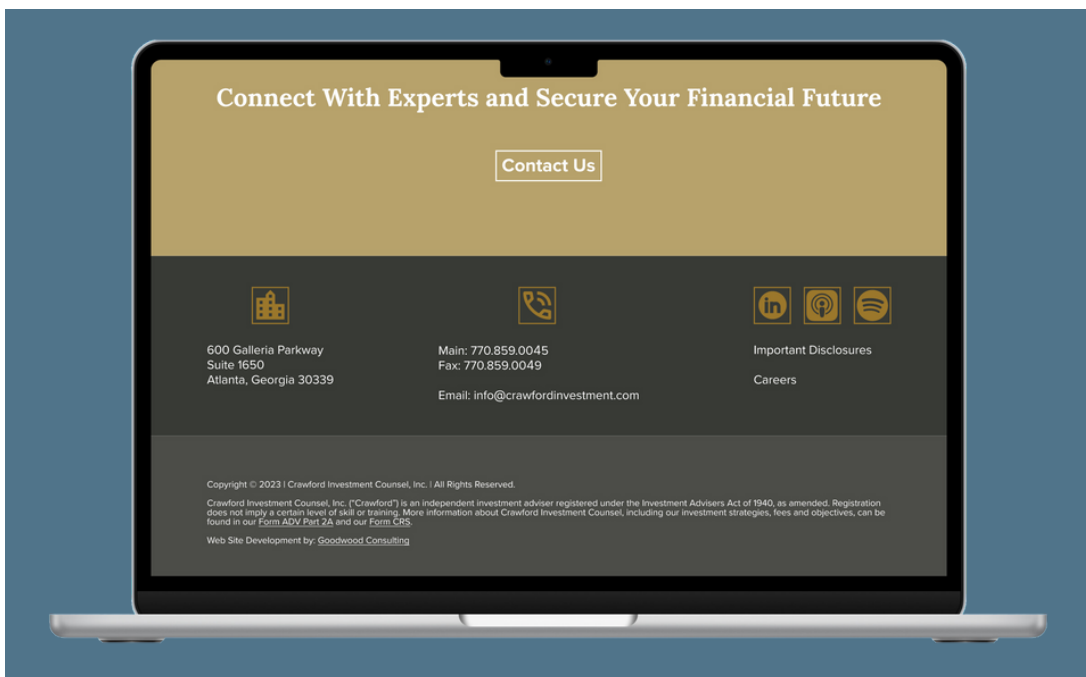
10 **New "About" Tab**

We created a new "About" tab with pages that were originally under "Home" to increase the ease of user navigation on the website, eliminating the subtabs under the "Home" tab.

11   **Firm Overview**

The box above the Crawford Guiding Principles was deleted. The logos were centered, and the overall look of the Crawford Guiding Principles section was changed.
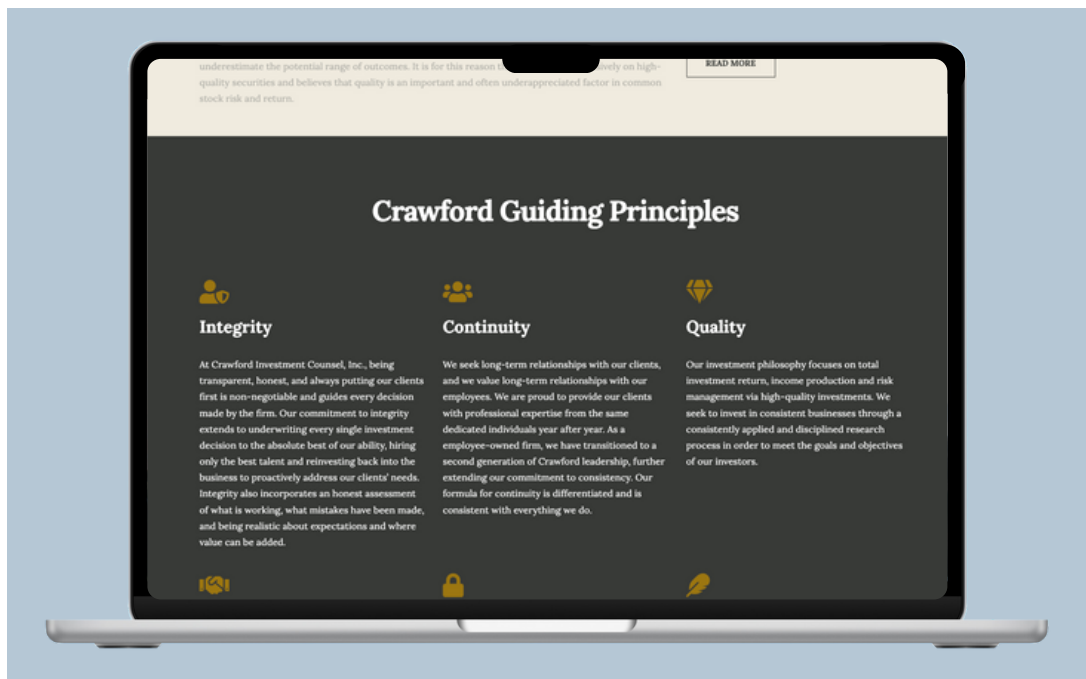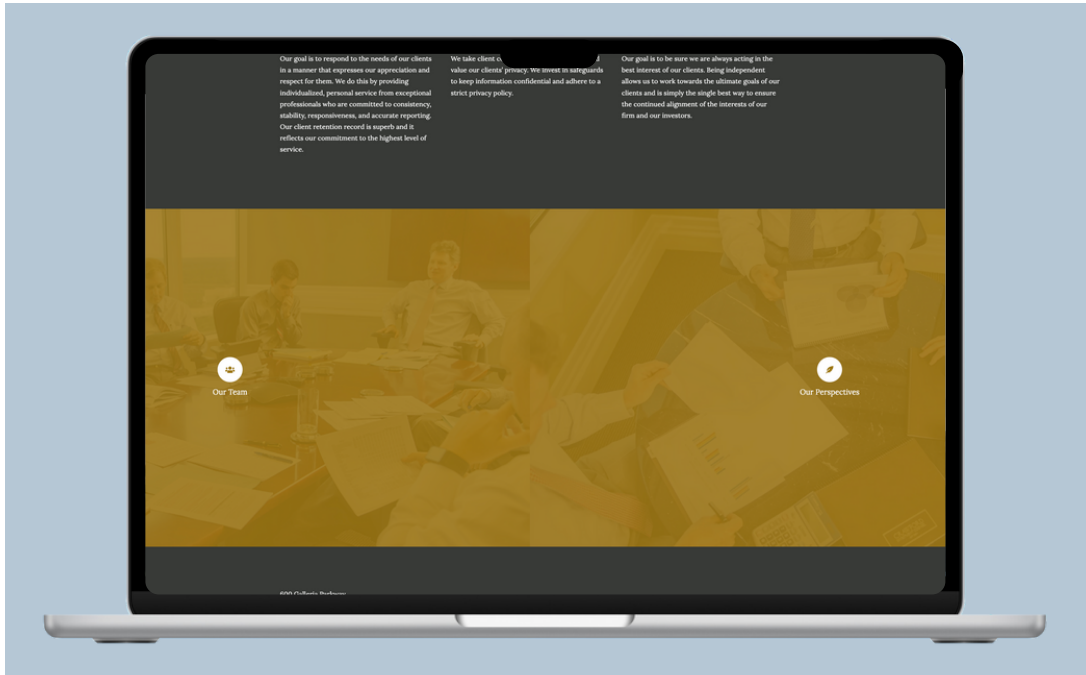
12 **Other Page Options**

The logos that link to the other pages were changed, and a lighter color overlay was added.

13 **Our Team**

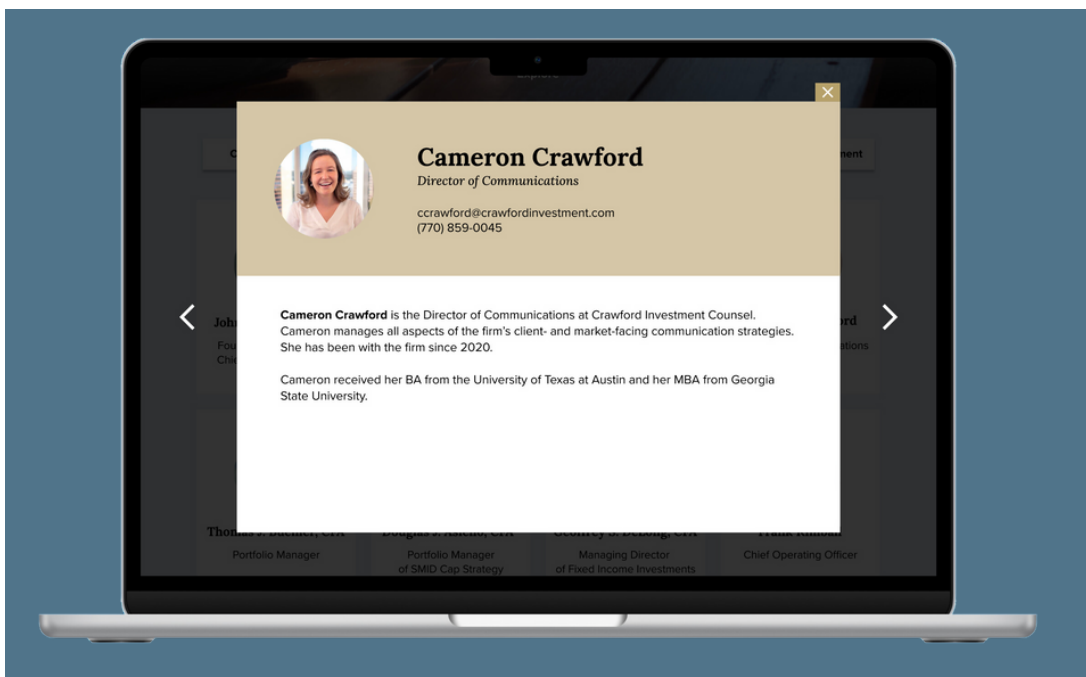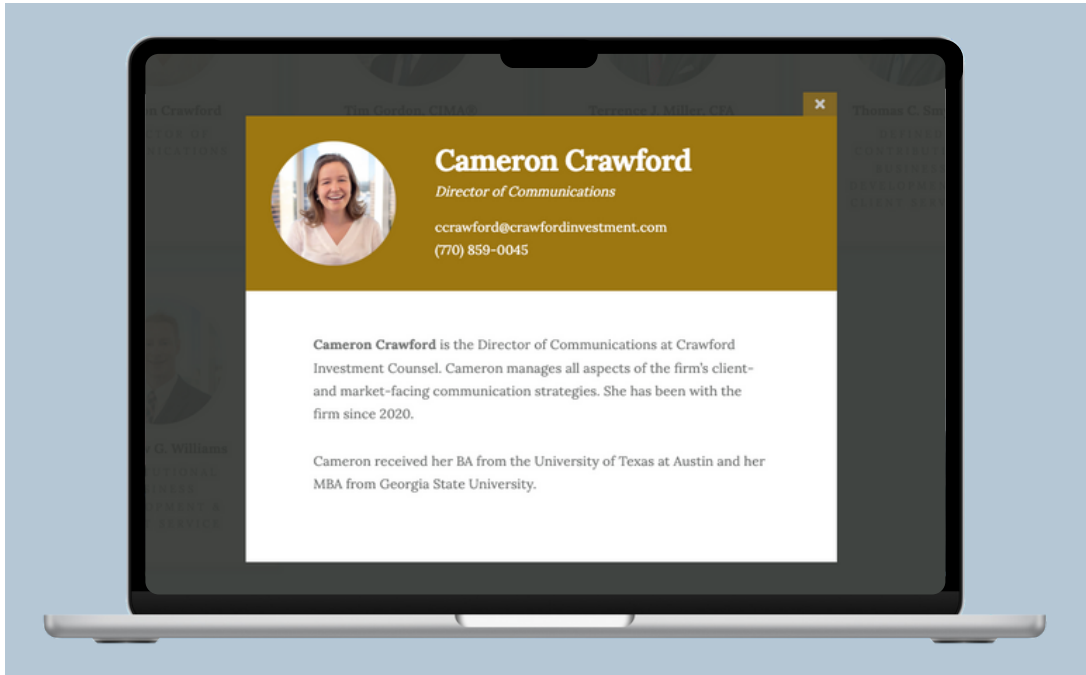The background landing photo and the background color was changed.
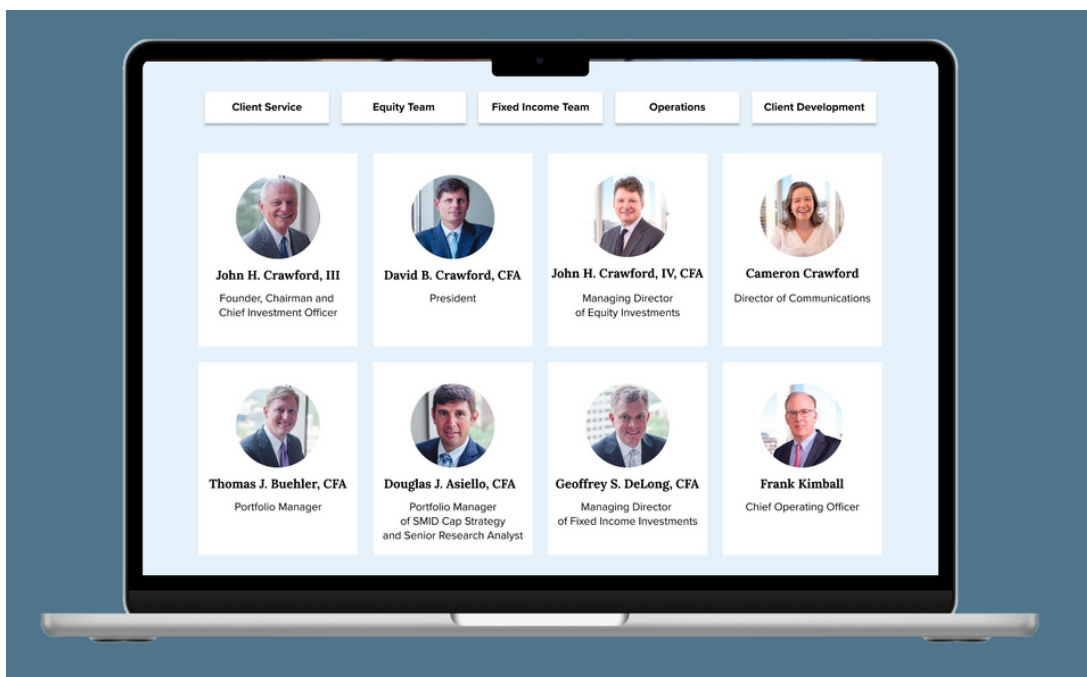
14 **Team Bios**

The colors were changed and the font for the body copy was changed to Proxima Nova.
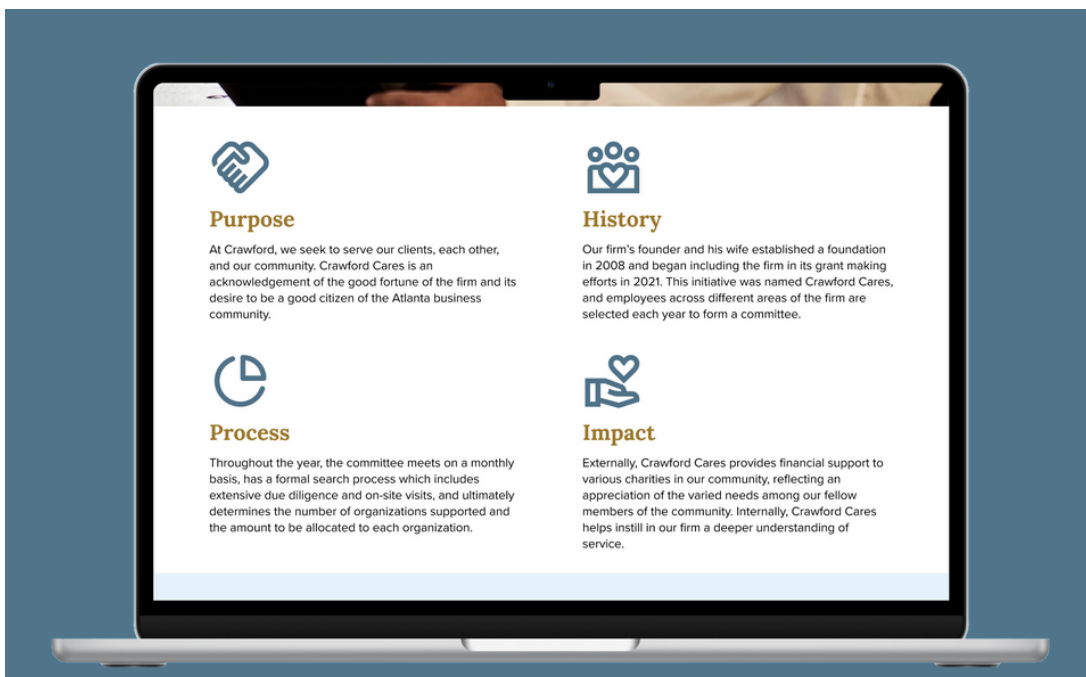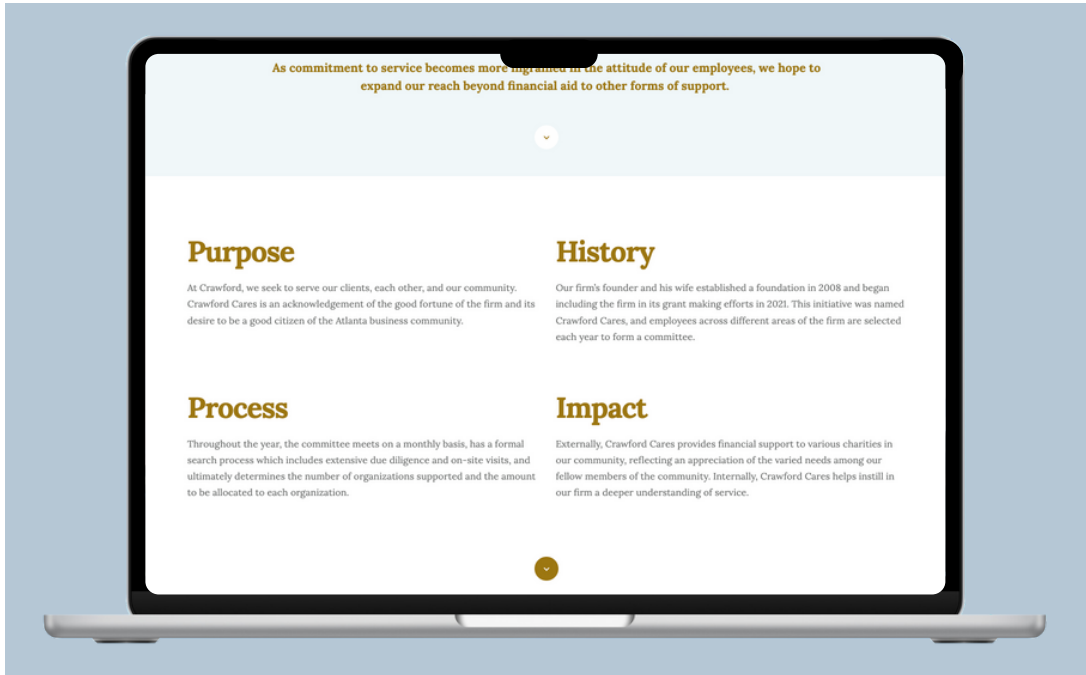
15 **Crawford Cares**

The copy was moved to the landing page to match the format of the other title pages and the font was changed to Proxima Nova.
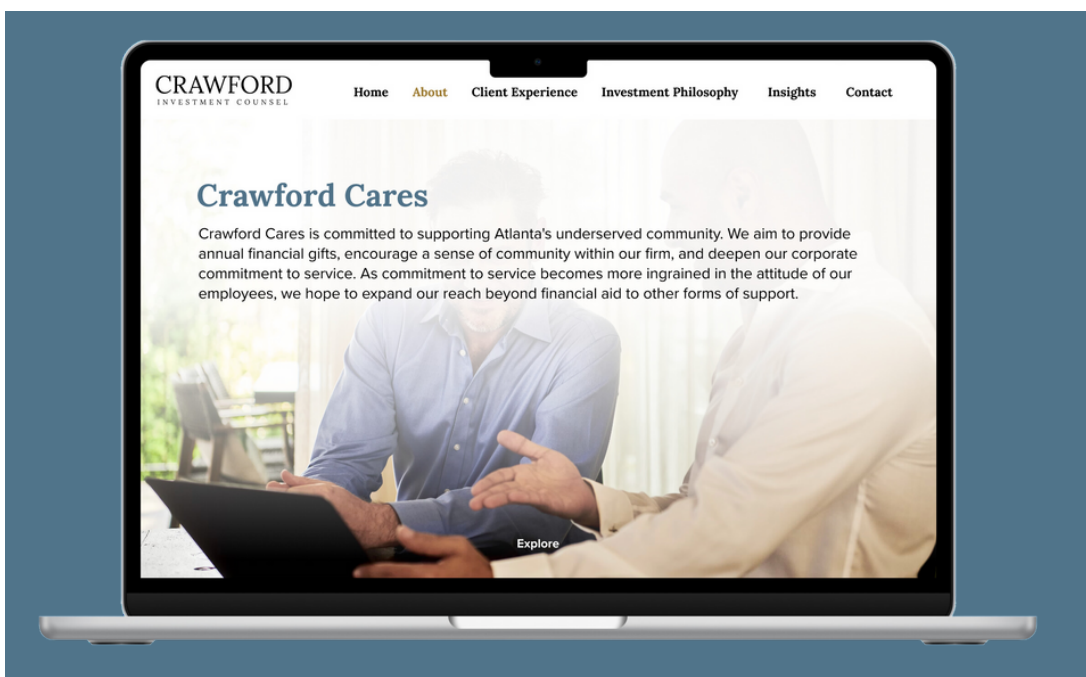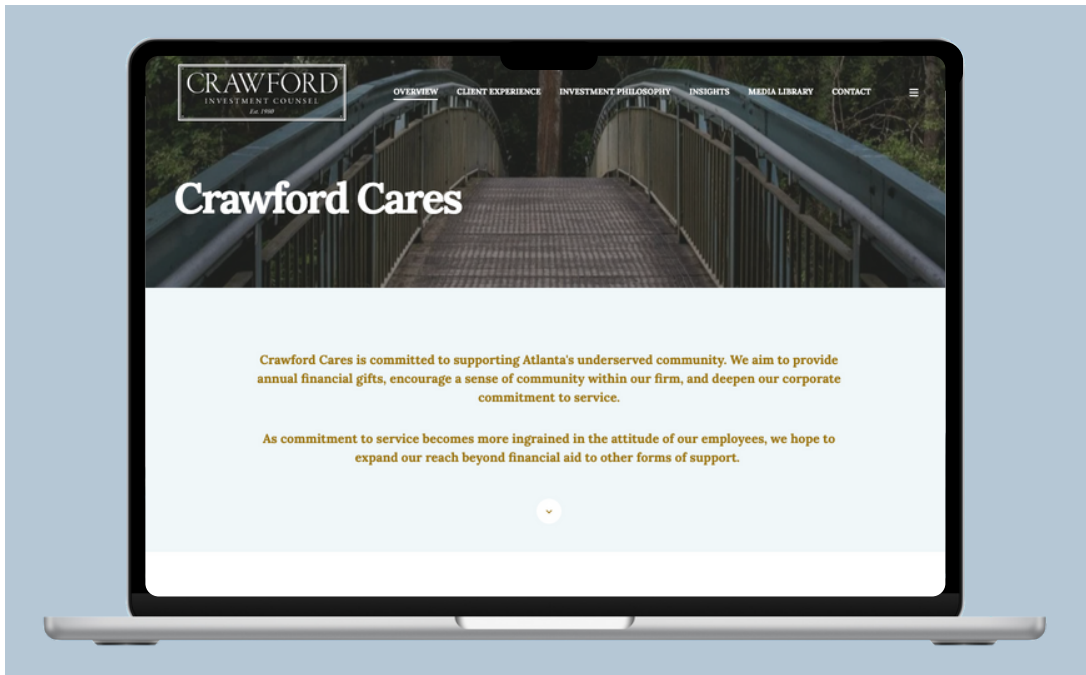
16   **Crawford Cares**

Logos were added to break up the text and create an easier reading experience.

**17**   **Crawford Cares Core Values**

The colors, font, and word alignment were changed. Photos were added to go with the core values instead of icons to emphasize the message. The organizations' logos are also more spread out and less cramped.
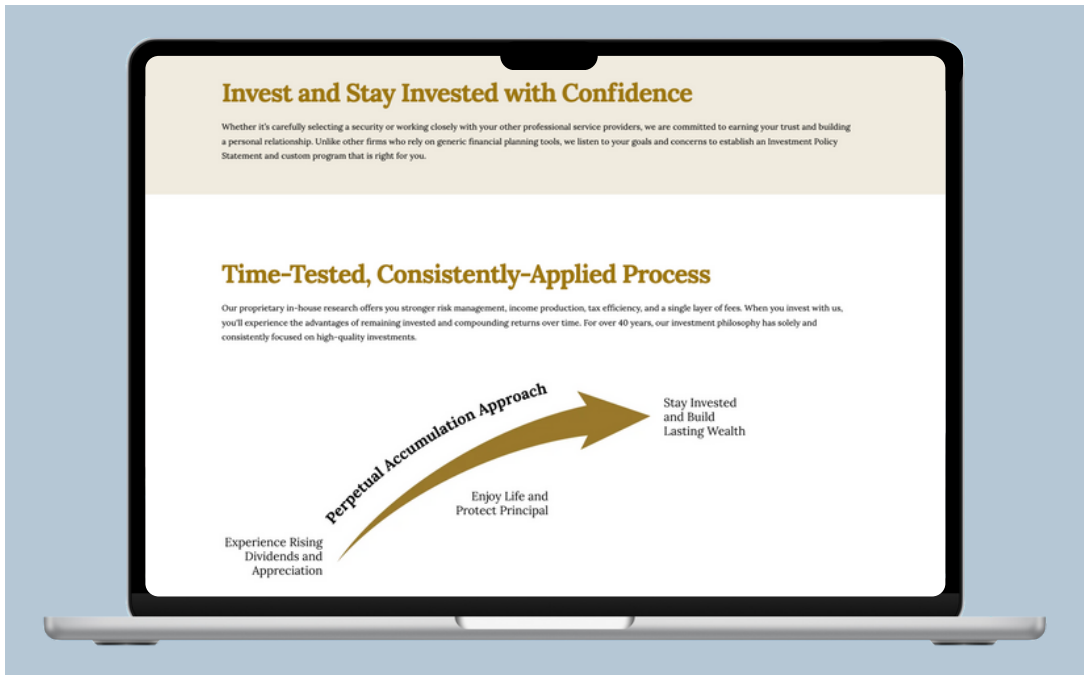
18 **Client Experience**

The background photo was changed, and the title was altered to the normal tab title instead of "Every Detail. Every Client. Every Day."
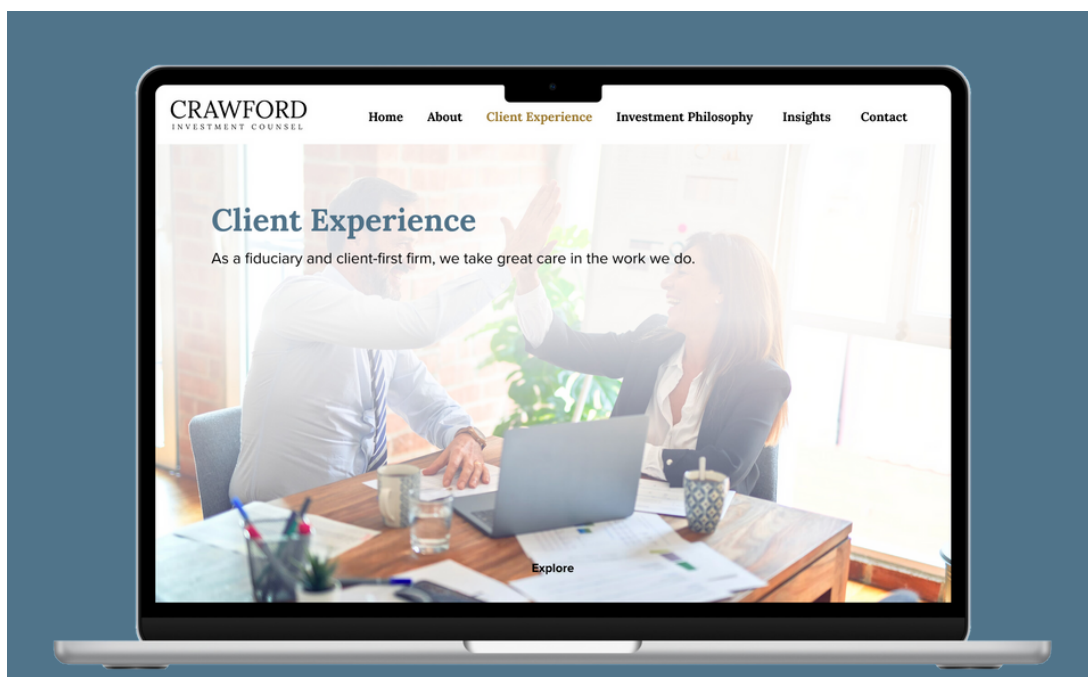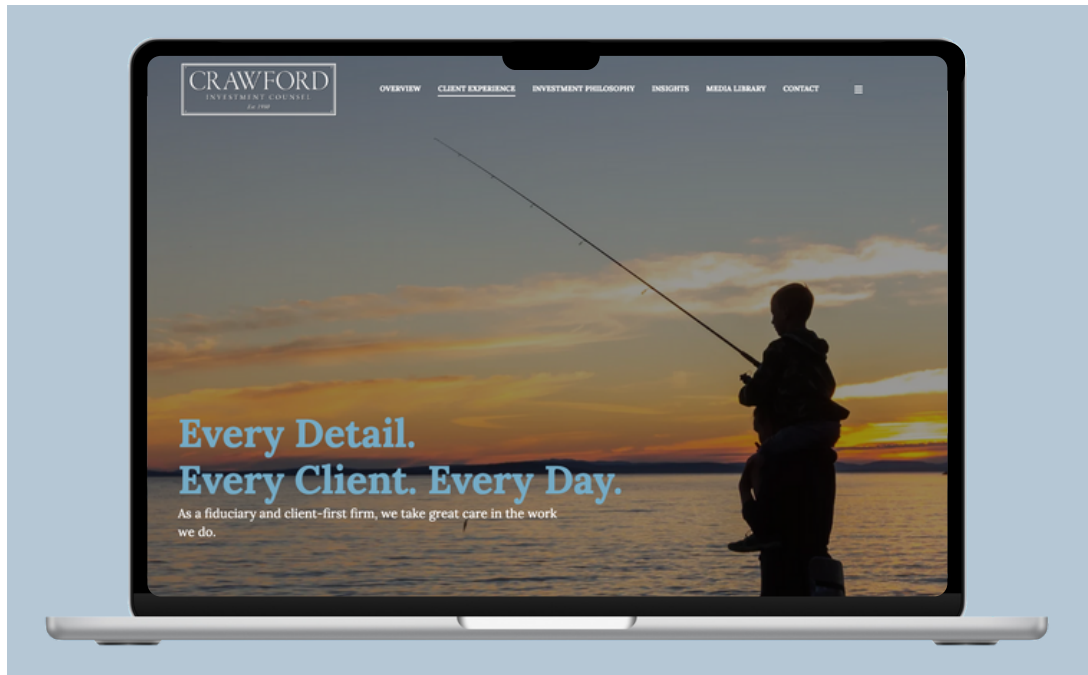
19   **New Perpetual Accumulation™ graphic**

The new Perpetual Accumulation™ graphic replaced the old graphic.

20   **Customized Investment Program**

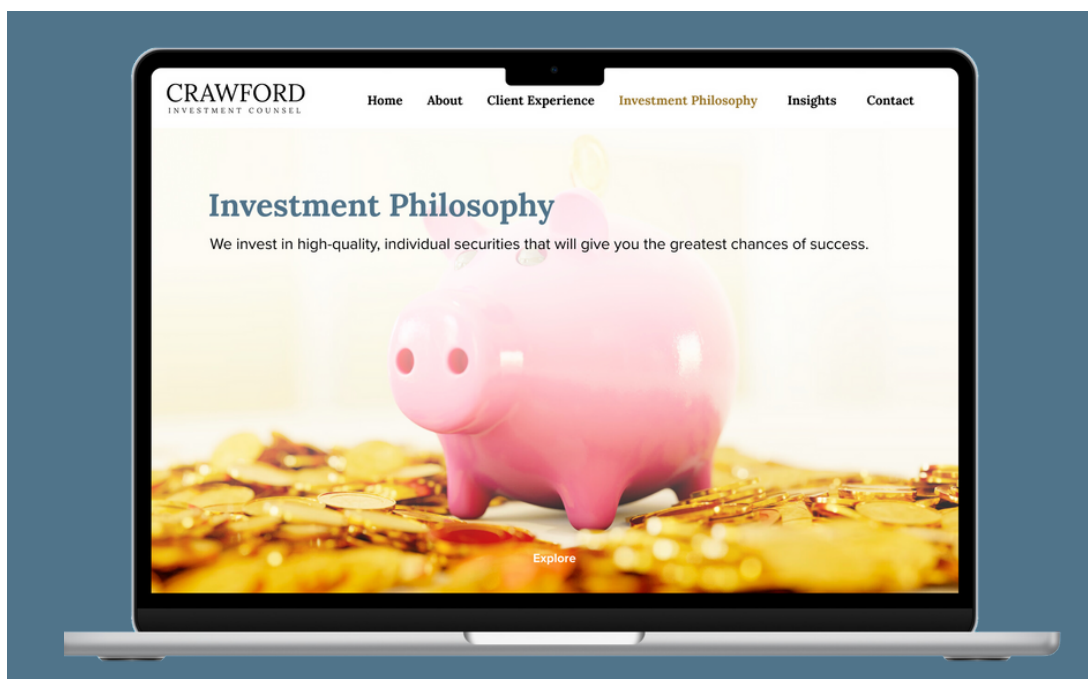The title was changed to fit text as well as getting rid of the "How we".
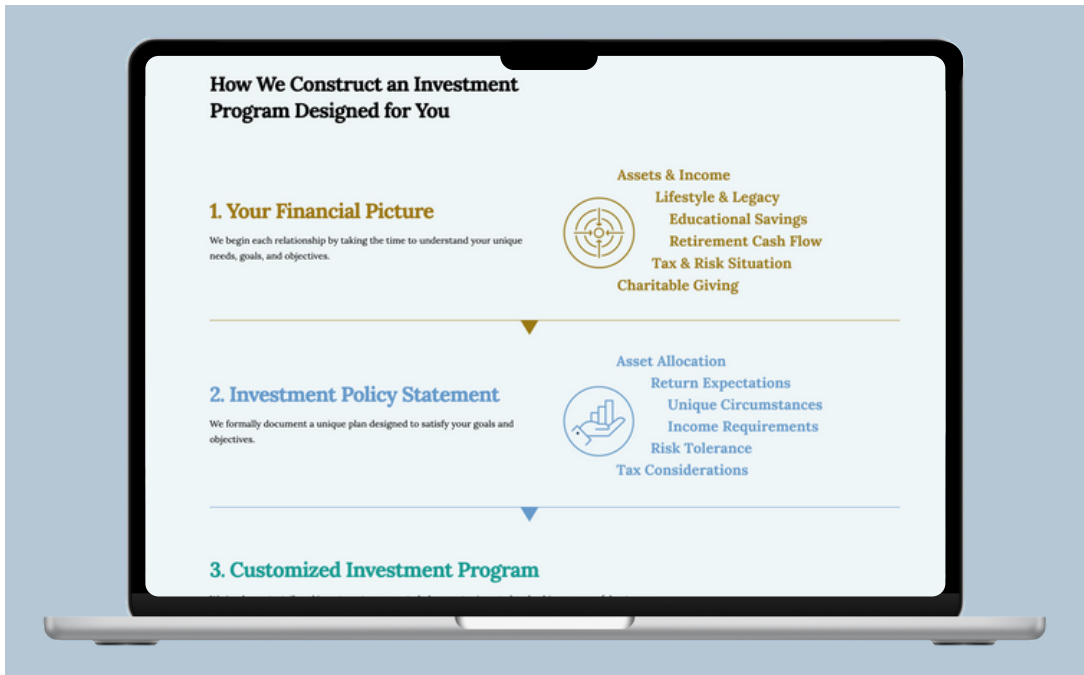
21   **Client Experience**
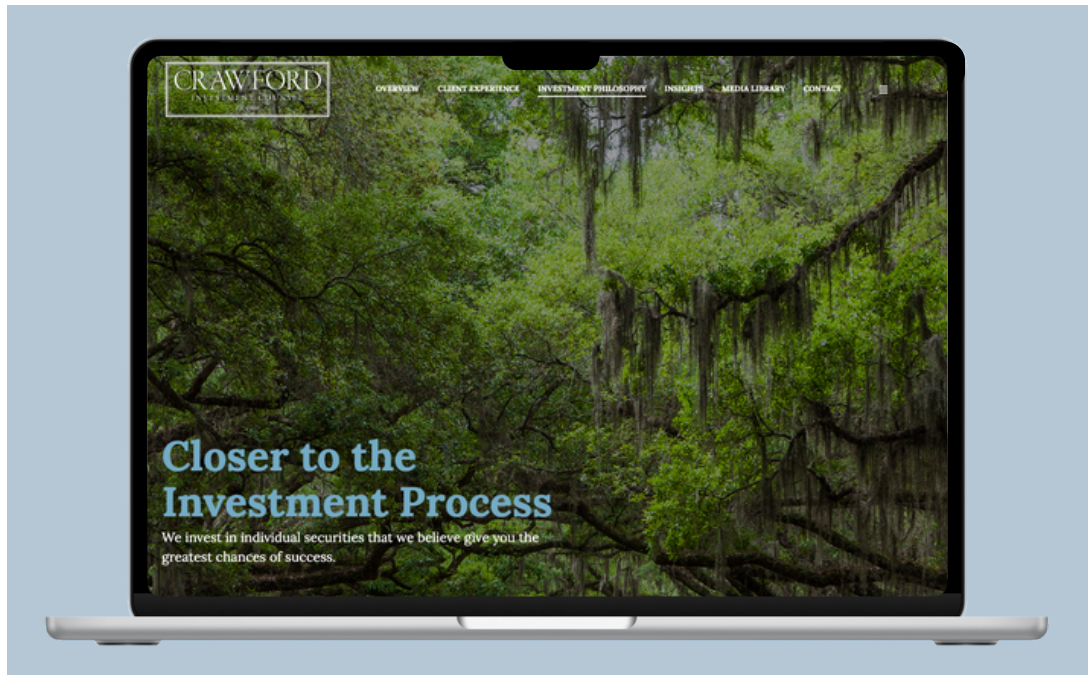
The "Crawford Balanced Strategy" section was deleted, so the video description can have more impact.

22   **Investment Philosophy**

The landing page photo, title, and subtitle were changed to match the new theme.

23   **Investment Philosophy**

The layout was changed so that the Small and SMID Cap Equity boxes were not automatically opened.
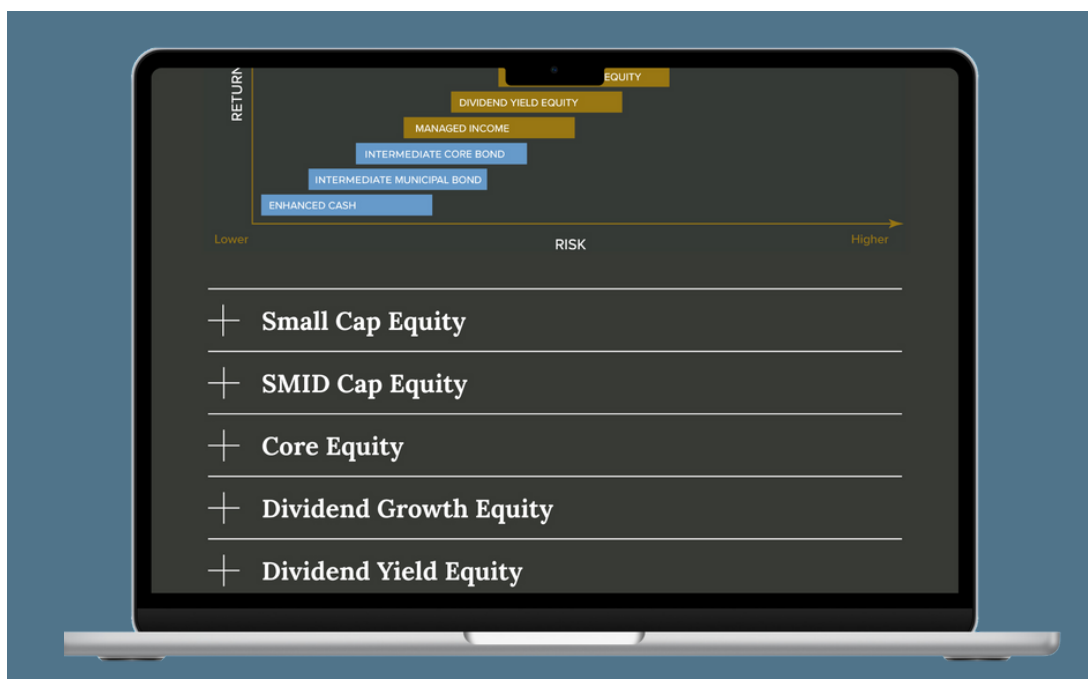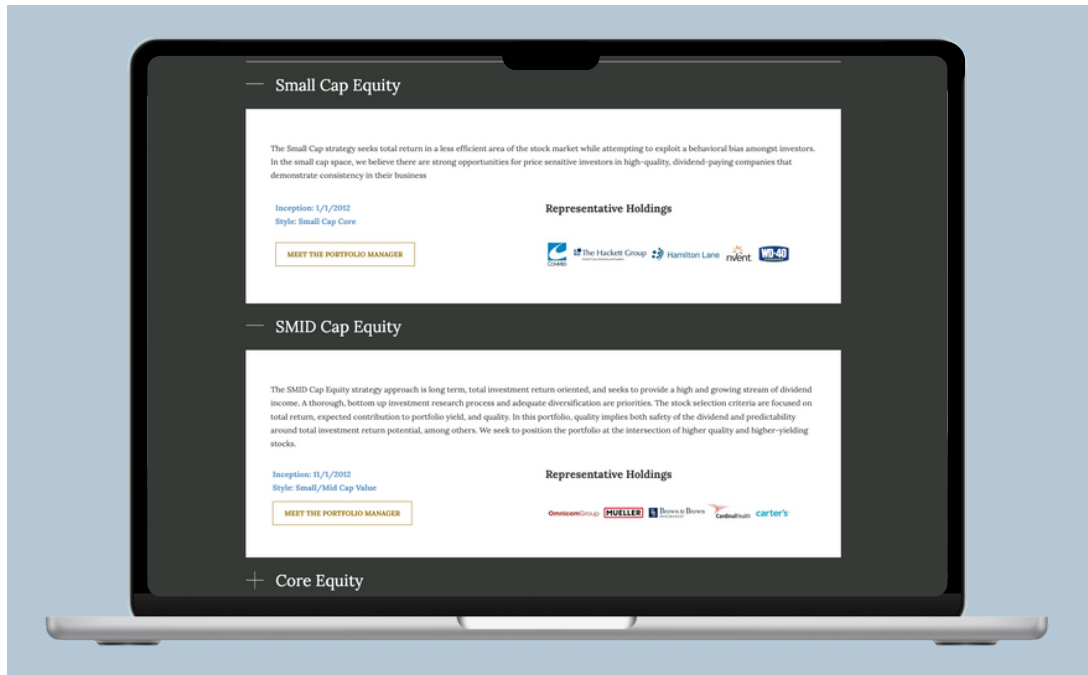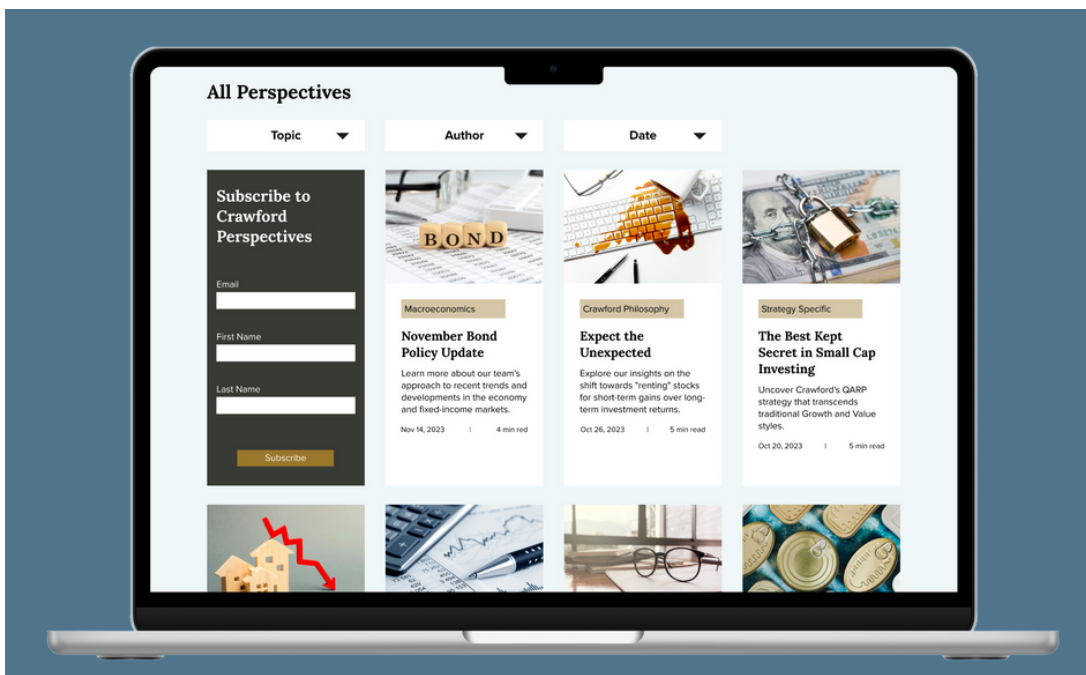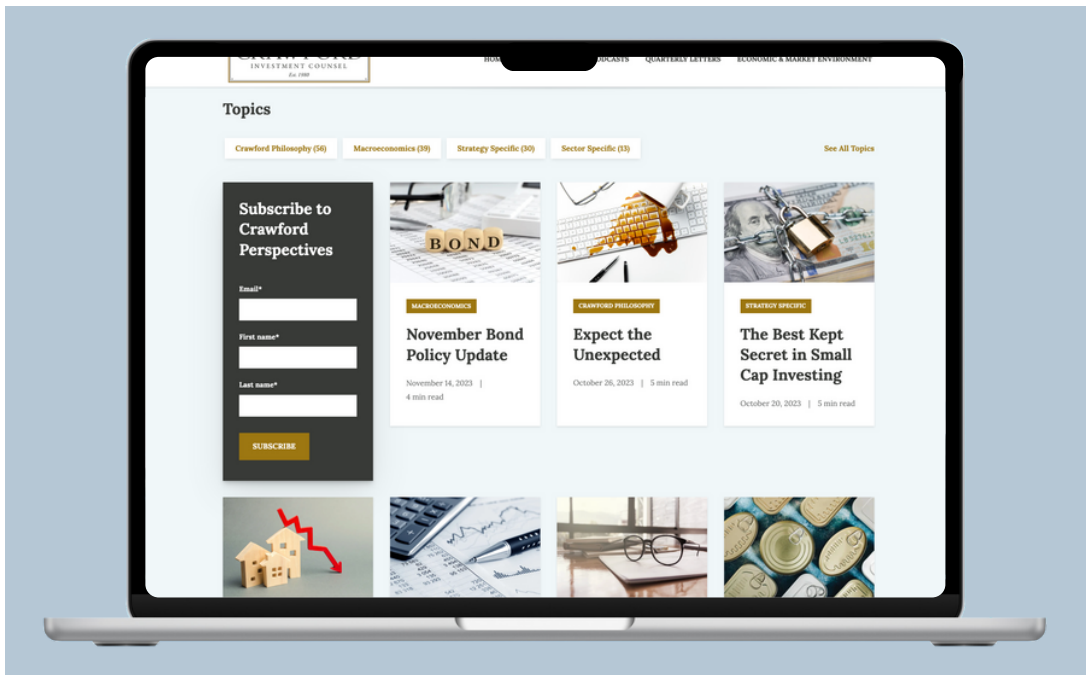
24 **Perspectives**

The navigation bar and site stay the same rather than moving to a "new" site. The subtitle was changed, so users have context for what "Perspectives" means. The background is no longer the most recent perspective, instead featuring a static photo in alignment with the tab title.
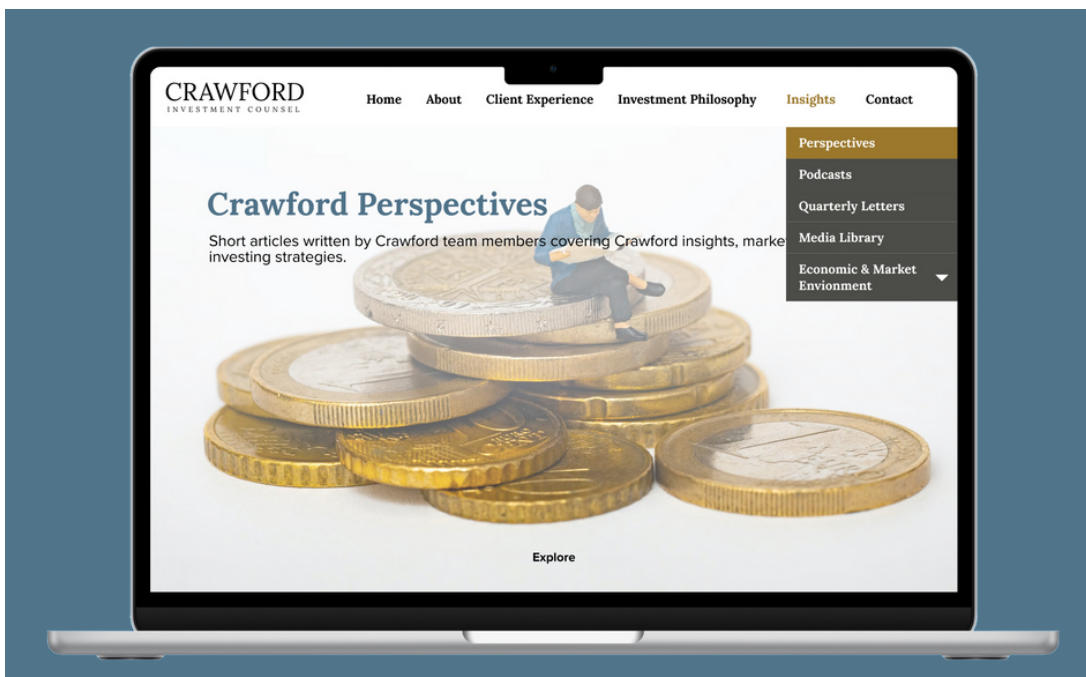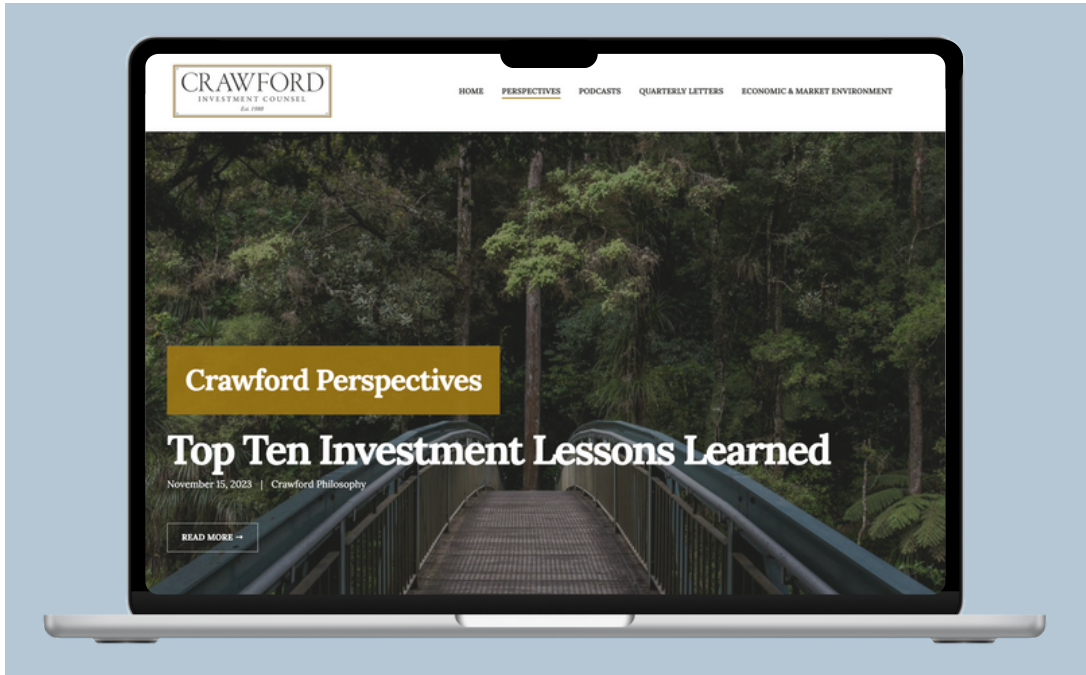
25 Filtering Perspectives

There is a new filtering system across all pages on the Insights tab. The Media Library filtering system also changed but uses a different one from the Perspectives page. All the boxes are now the same size to be more visually pleasing. Blurbs were added to the Perspectives and the publishing date and read time now show up on one line. Proxima Nova font replaced the font for non-header copy. The tag color also changed.
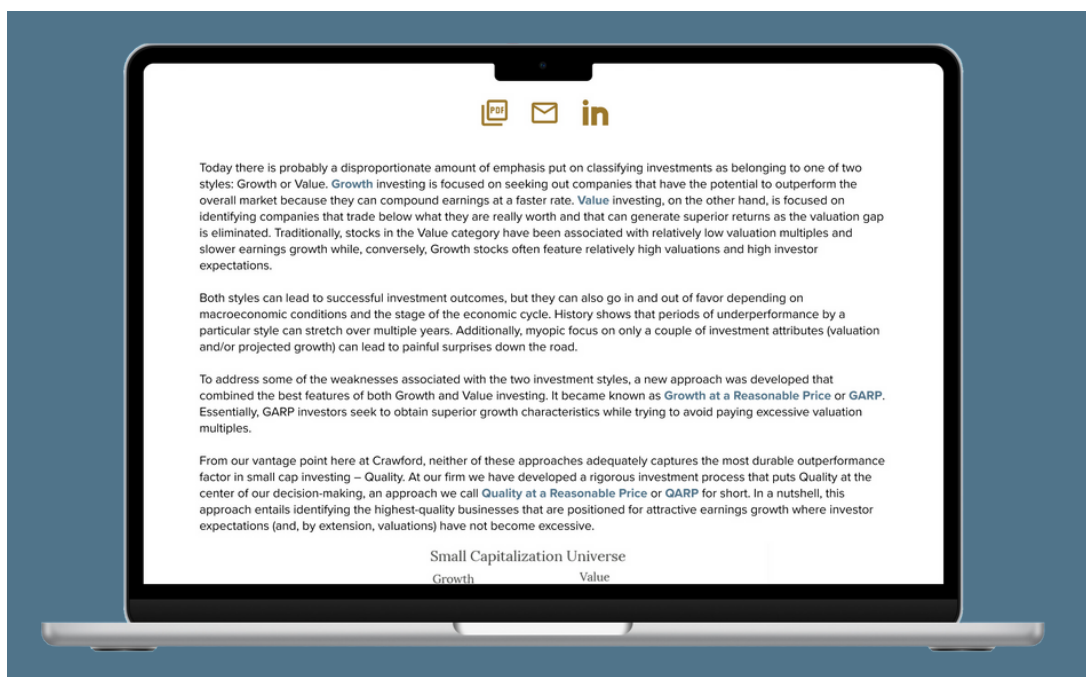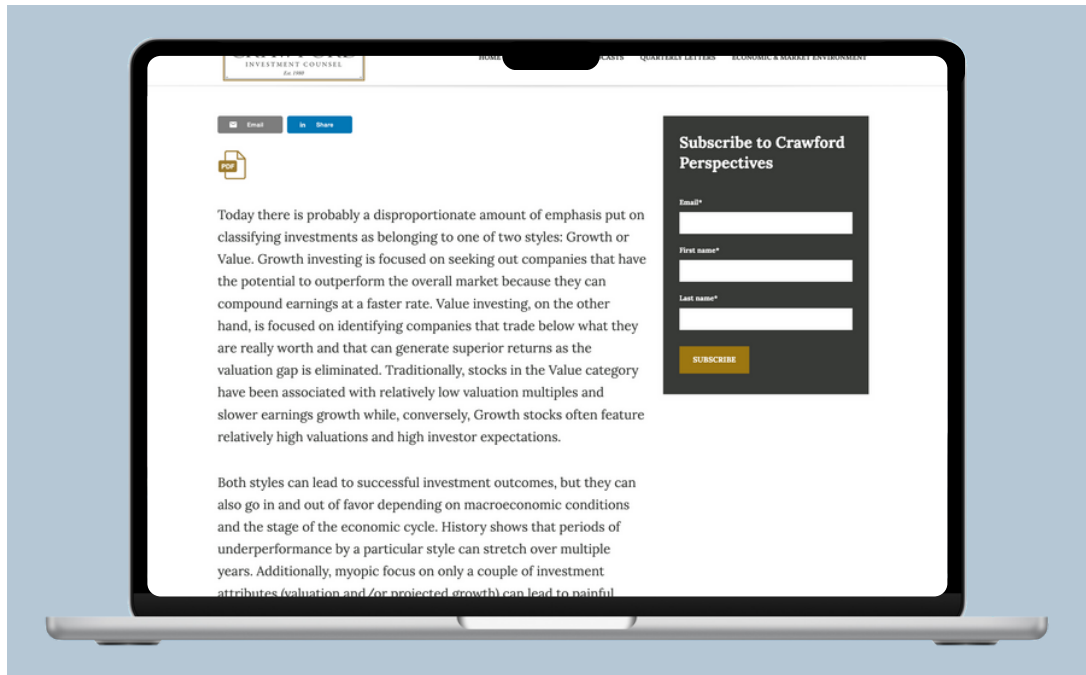
26 **Perspective Example**

The information has more room to breathe with larger spacing. The background was replaced with a contextual background photo as well as an added blue overlay on top to keep visuals cohesive. All non-header text was changed to Proxima Nova.
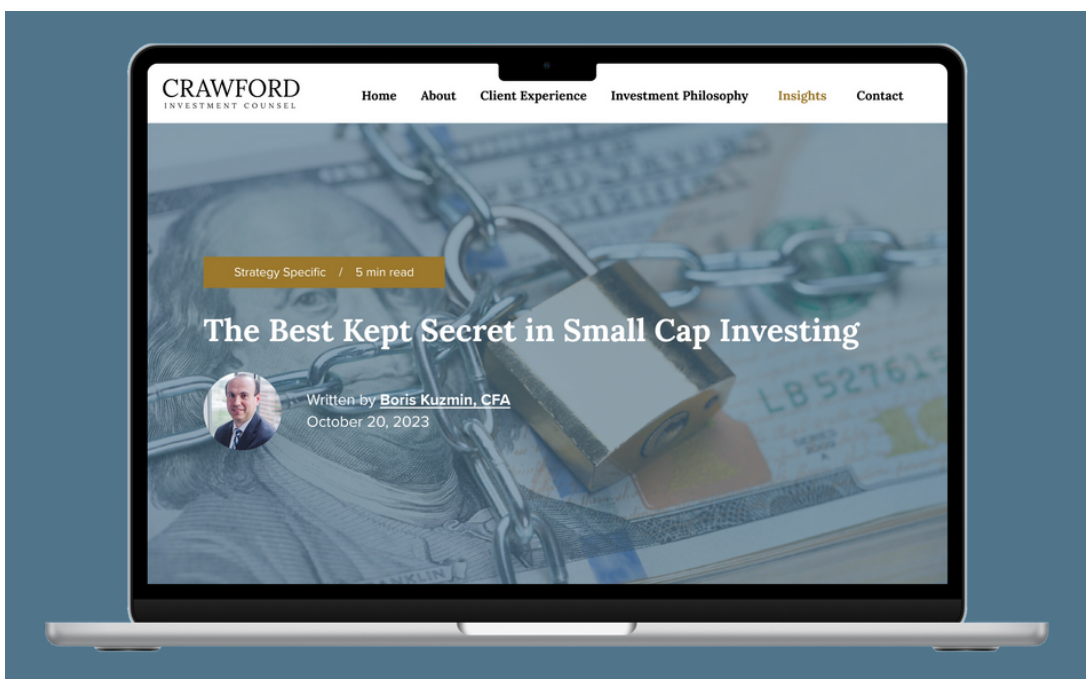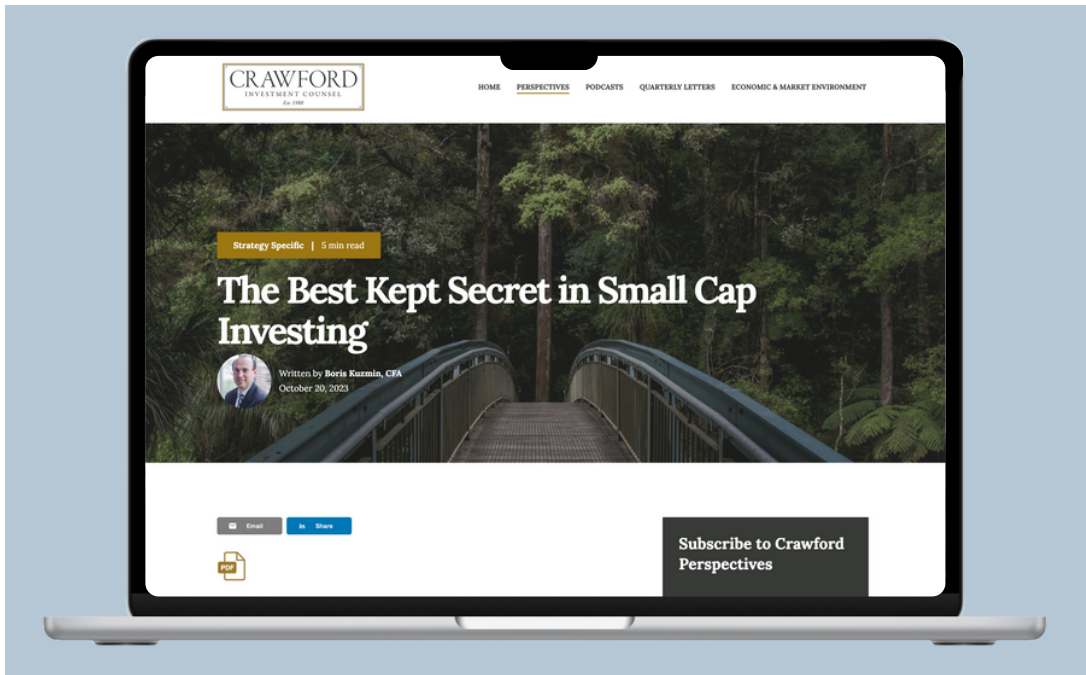
27 **Perspective Example**

The buttons were simplified into icons for PDF download and sharing. Throughout the copy, there are important terms that are highlighted so readers can easily skim for information. The "Subscribe" box was also moved to the end of the Perspective to create an easier reading experience.
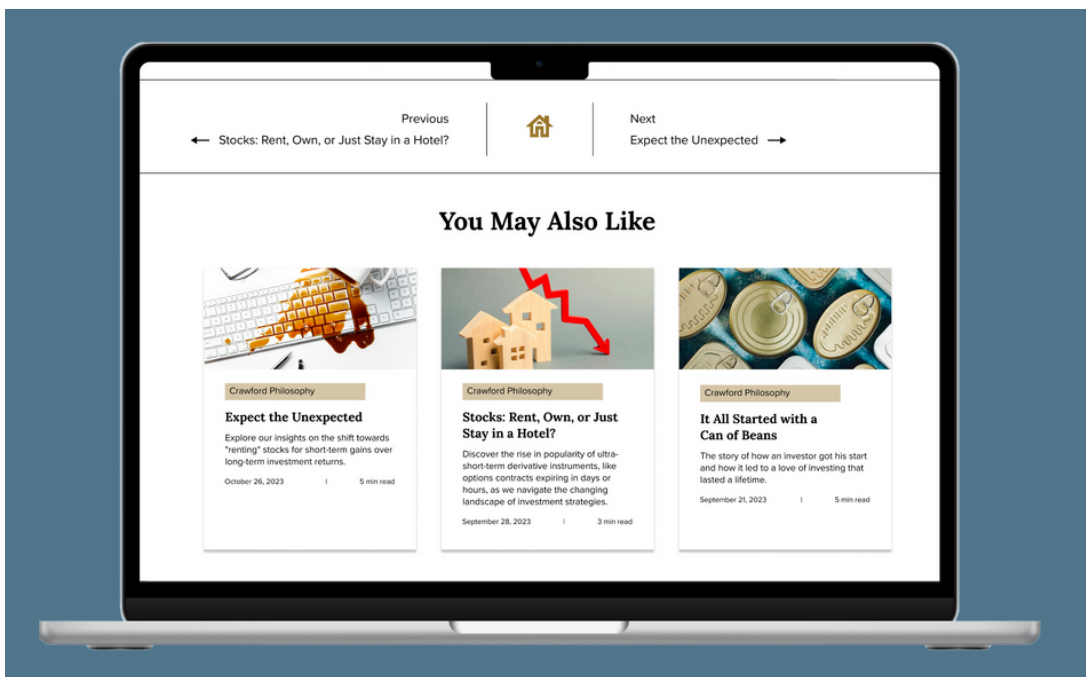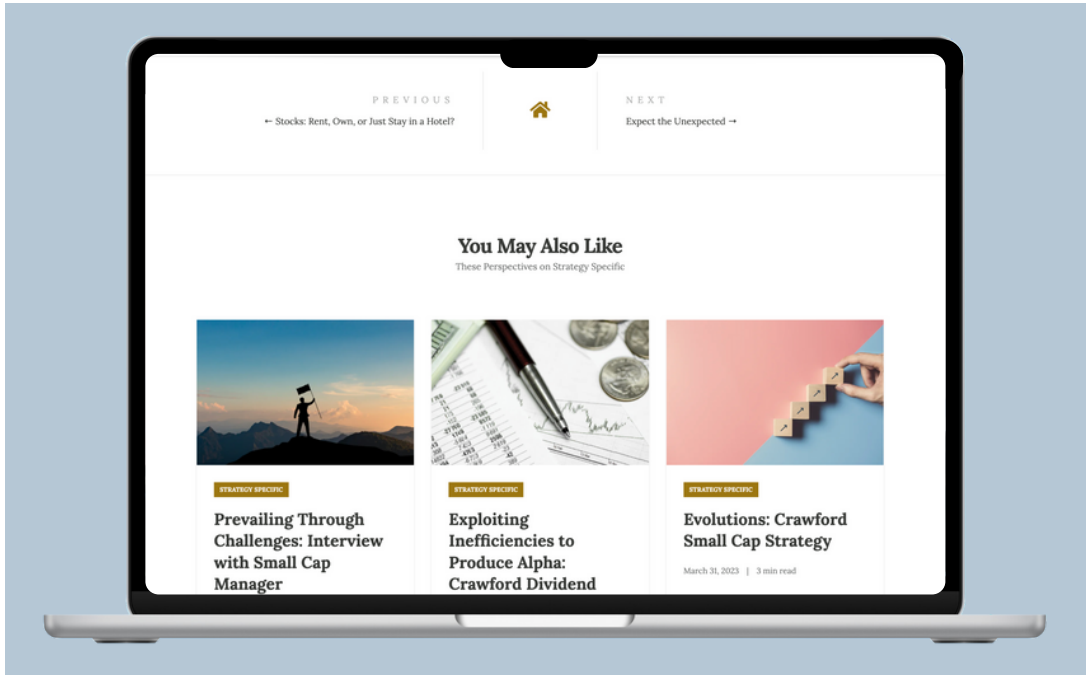
28 **Perspective Example**

The previous and next section was slightly modified, with the letter spacing changed, and the "You May Also Like" section was updated similar to the Perspectives list to match.

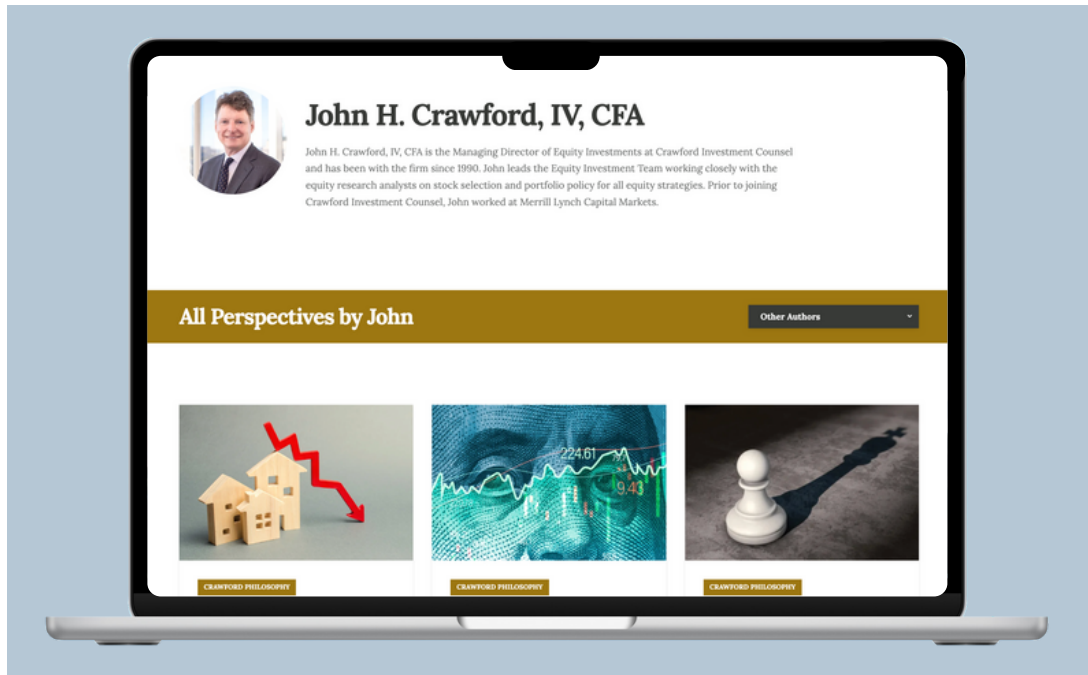**29**   **Perspectives By A Specific Author**

A bigger landing page was created with a larger profile picture while spacing out the biography and changing the body font to Proxima Nova. The Perspectives were also updated to match the new look and contain a short description of the content for preview.
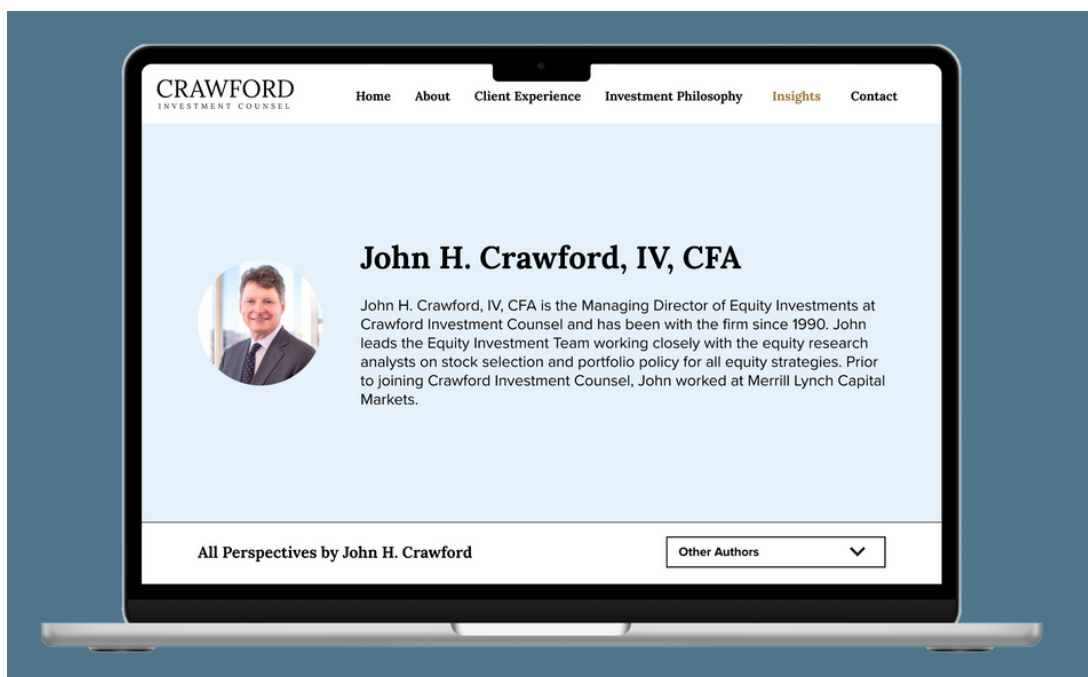
30   **Podcasts Landing Page**

Once again, the navigation bar and site stay the same rather than moving to a "new" site. The landing page changed from the most recent podcast to a simple landing page with a title, subtitle, and new background image.
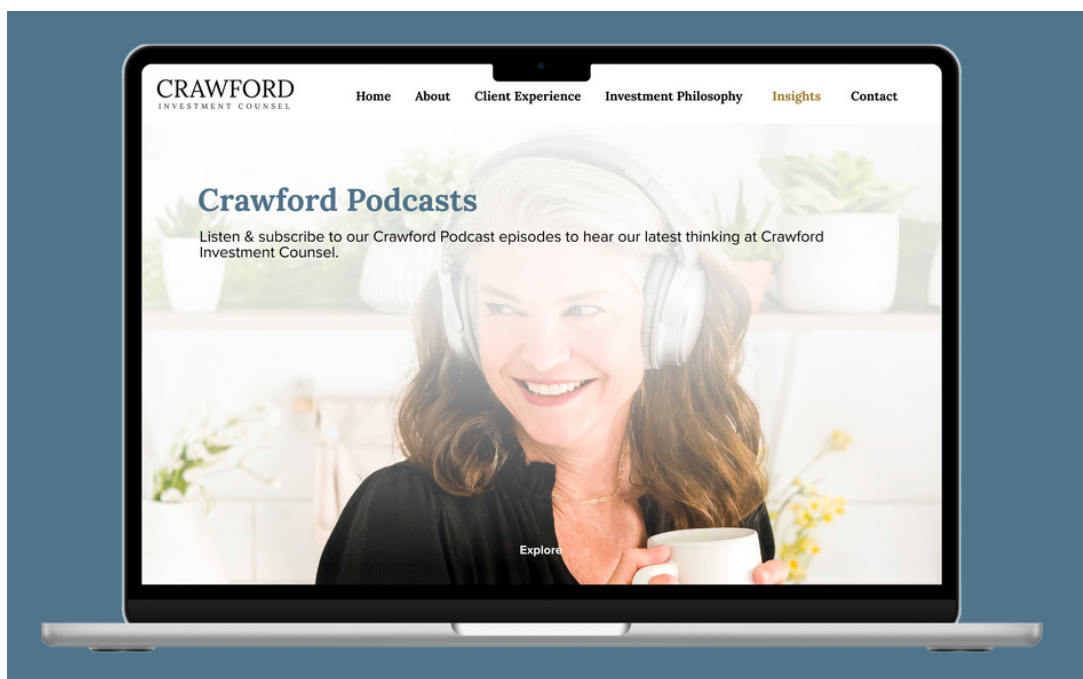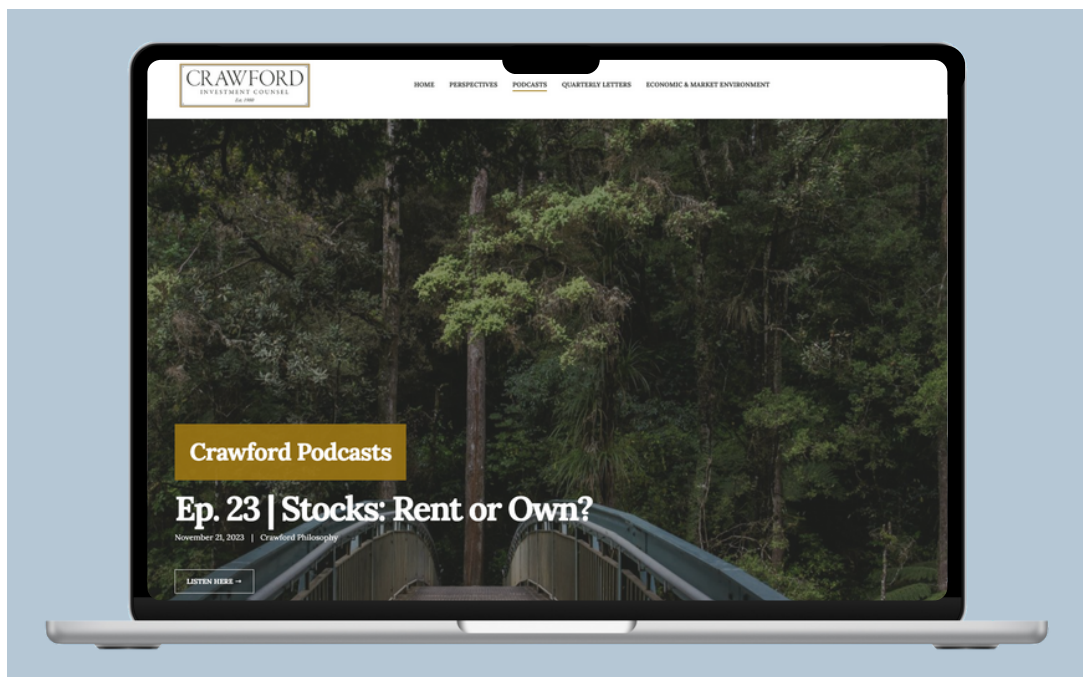
31 **Podcasts**

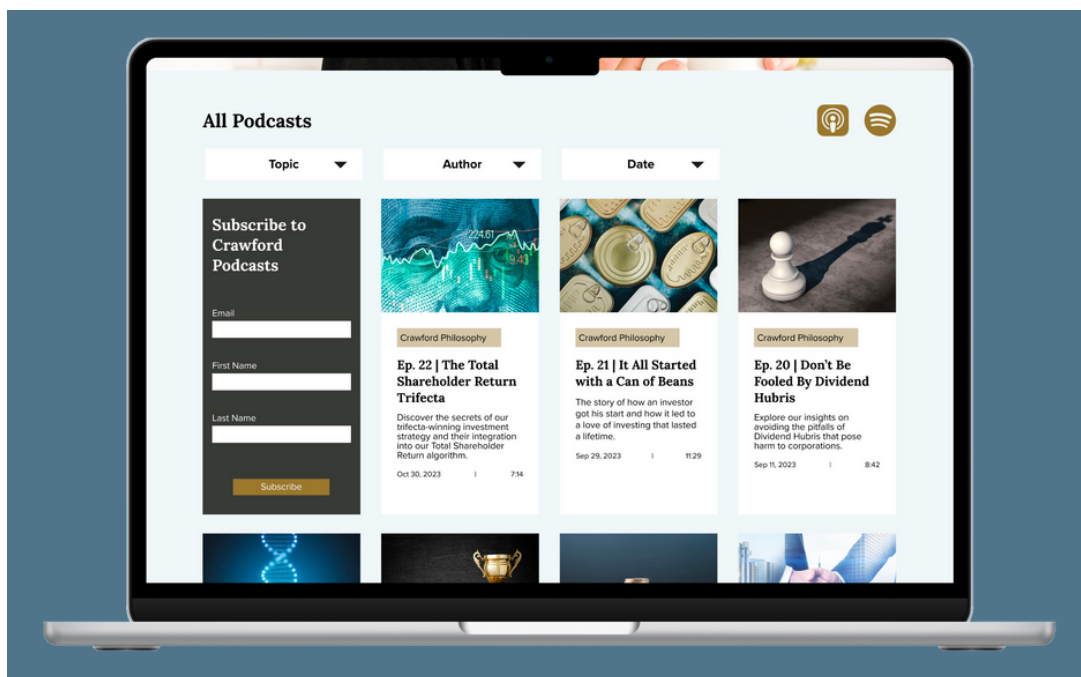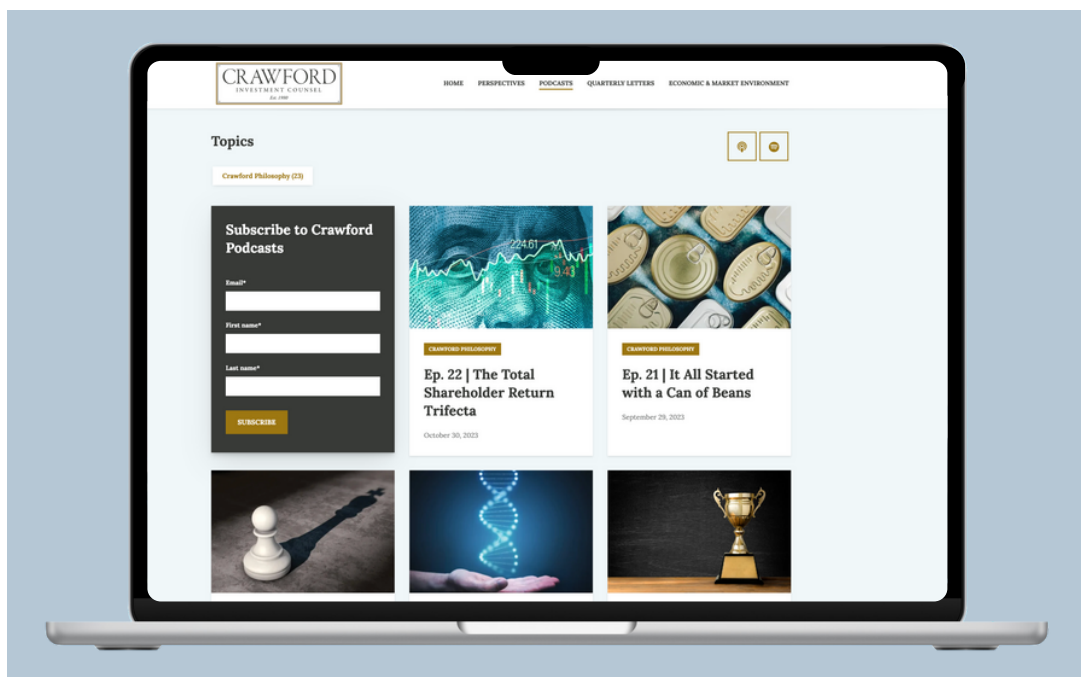There are new logo designs linking to platforms to listen to Crawford Podcasts. Similarly to Perspectives, there is a new filtering system, four columns to match the Perspectives page, updated tag colors with every new Podcast box, and added blurbs, publishing date, and podcast length which were combined on one line. For the "Subscribe" box, the copy was changed to "Crawford Podcasts" instead of "Audio Blog" and the box size matches the other podcast boxes.

32 **Podcast Example**

Aligning to the Perspectives page again, there is a photo that matches the concept of the Podcast episode. There are new logos with no square outlines moved to the top center of the page.
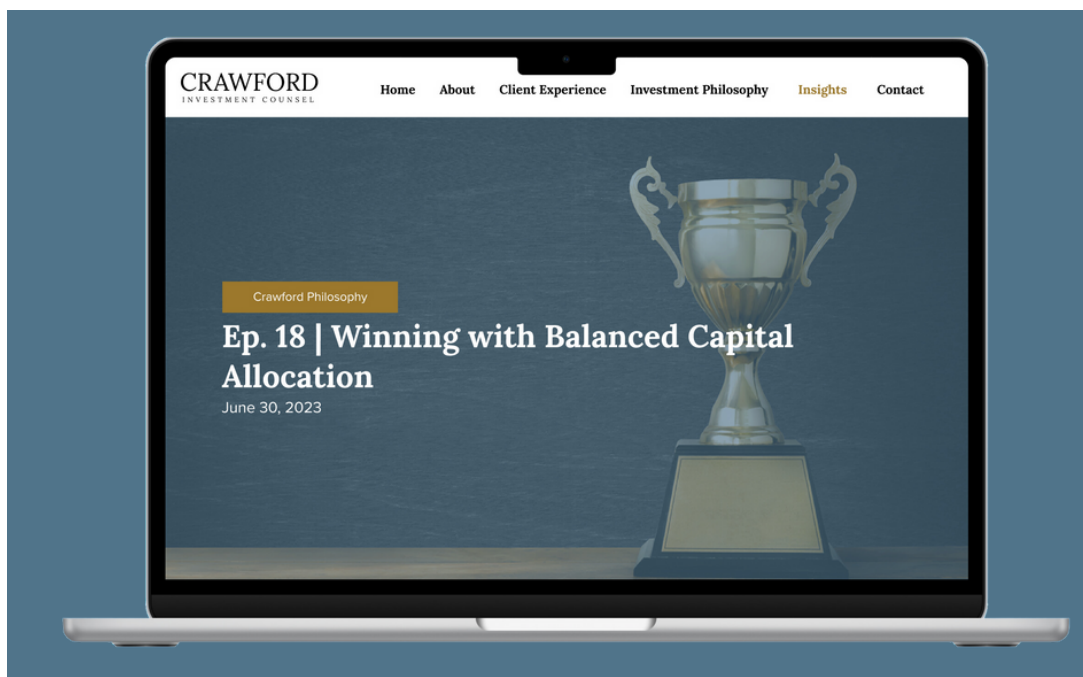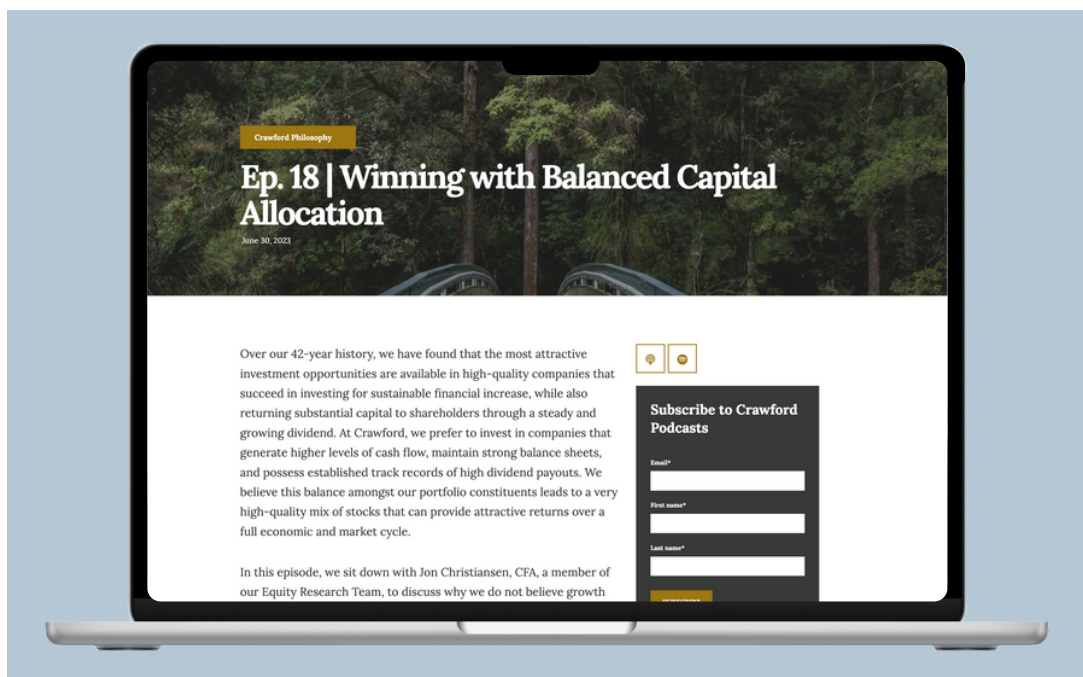
33   **Podcast Example**

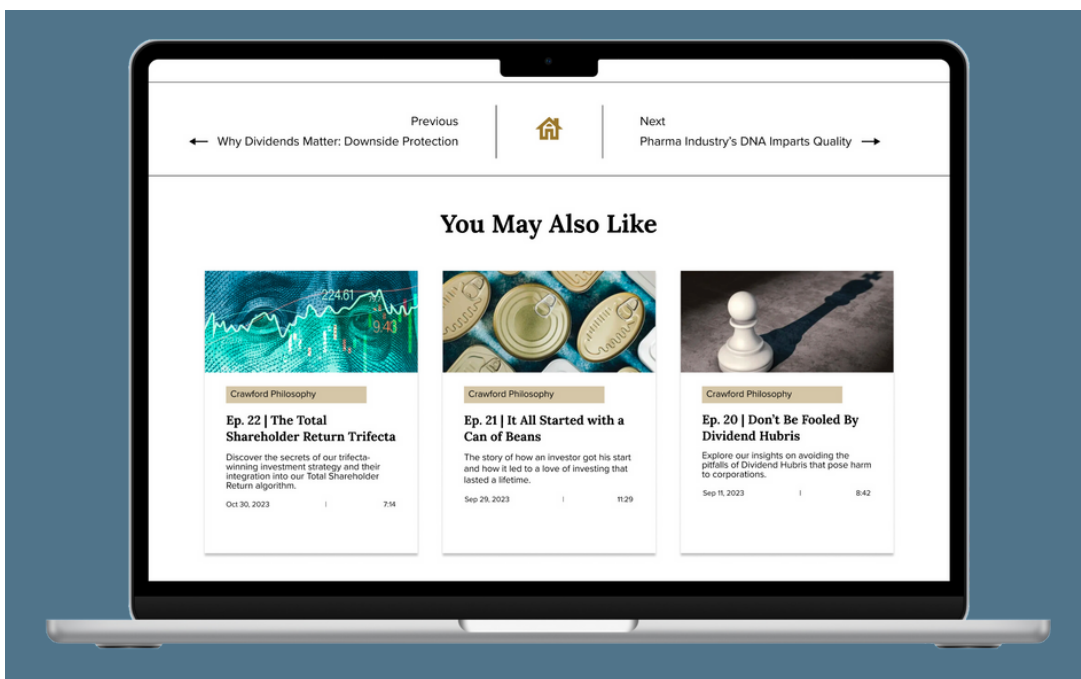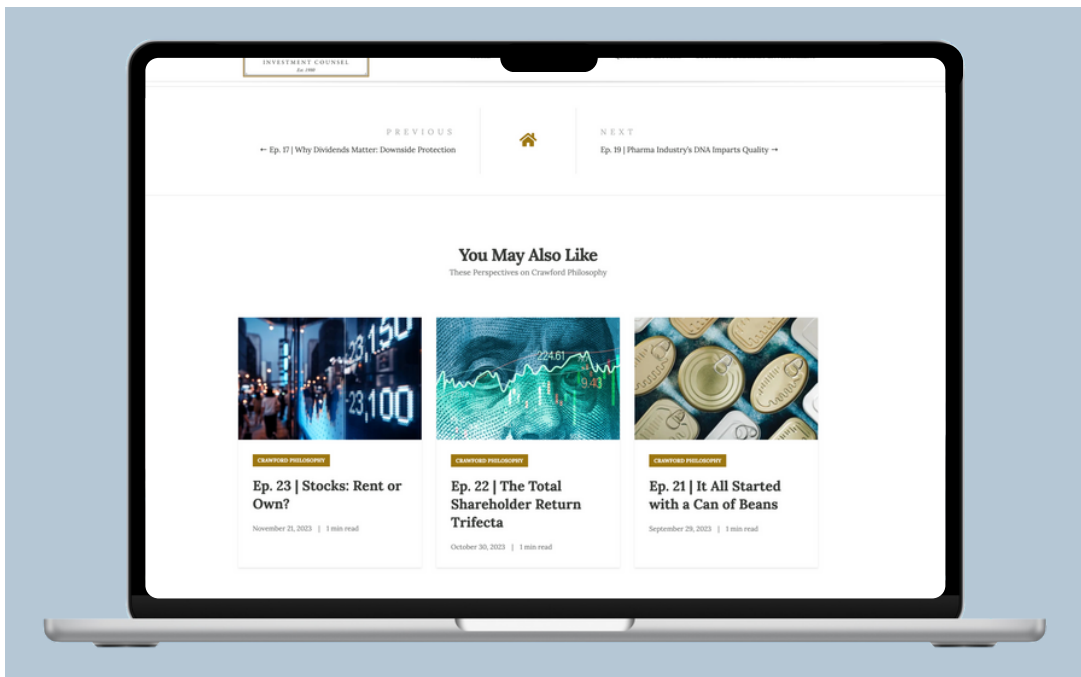The subscribe box is now at the end to match the Perspectives page to not distract the listener. There is now a new button look that says "Learn More" rather than "Read More".
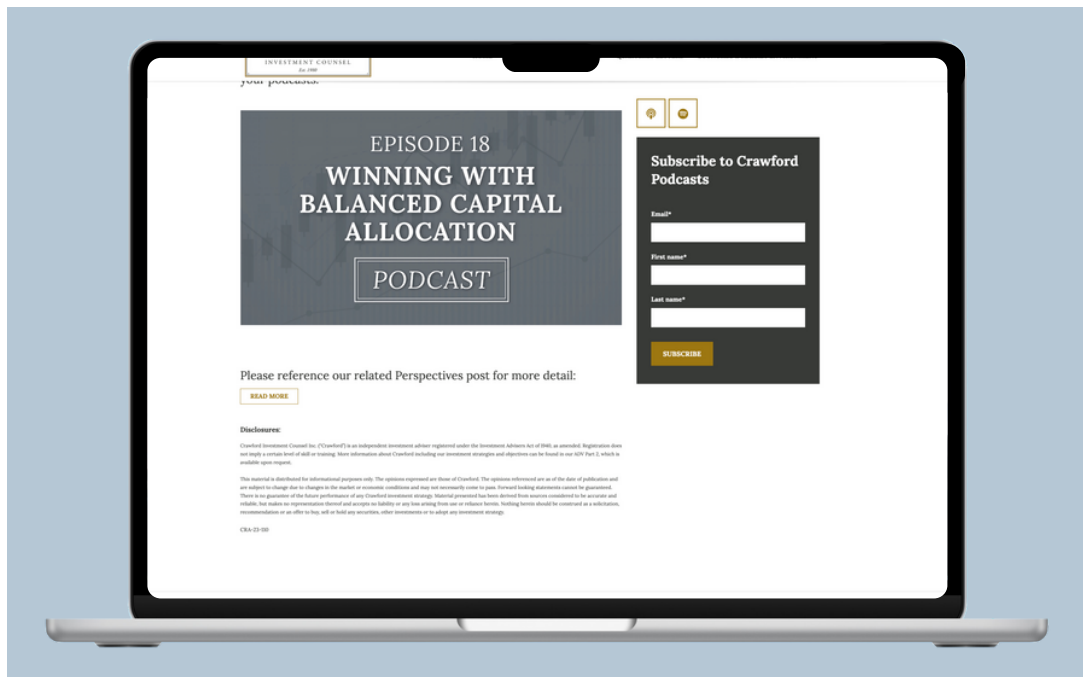
34 **Podcast Example**

The bottom navigation bar and other Podcasts section was updated.

35 **Quarterly Letters Landing Page**

A new landing page with title, subtitle, and background photo was created.
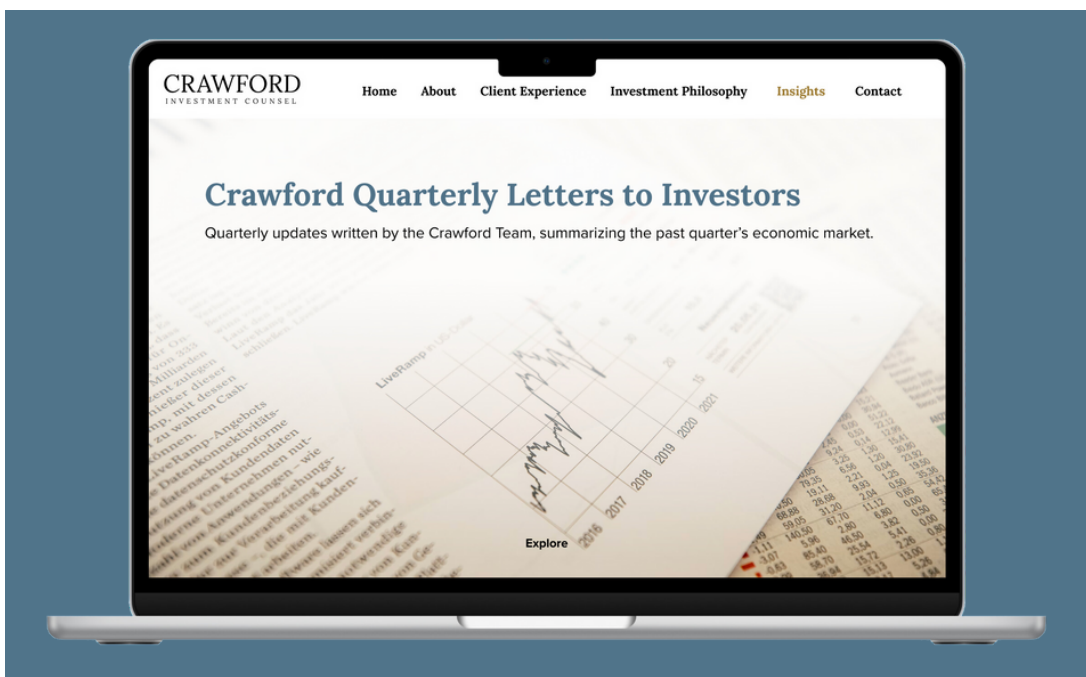
36 **Quarterly Letters List**

To match the other Insights tabs, there is a new filter system, the boxes are the same size, four columns were added, and blurbs, published date, and read time were added. The boxes have new tags and justified the publishing date on the left side.
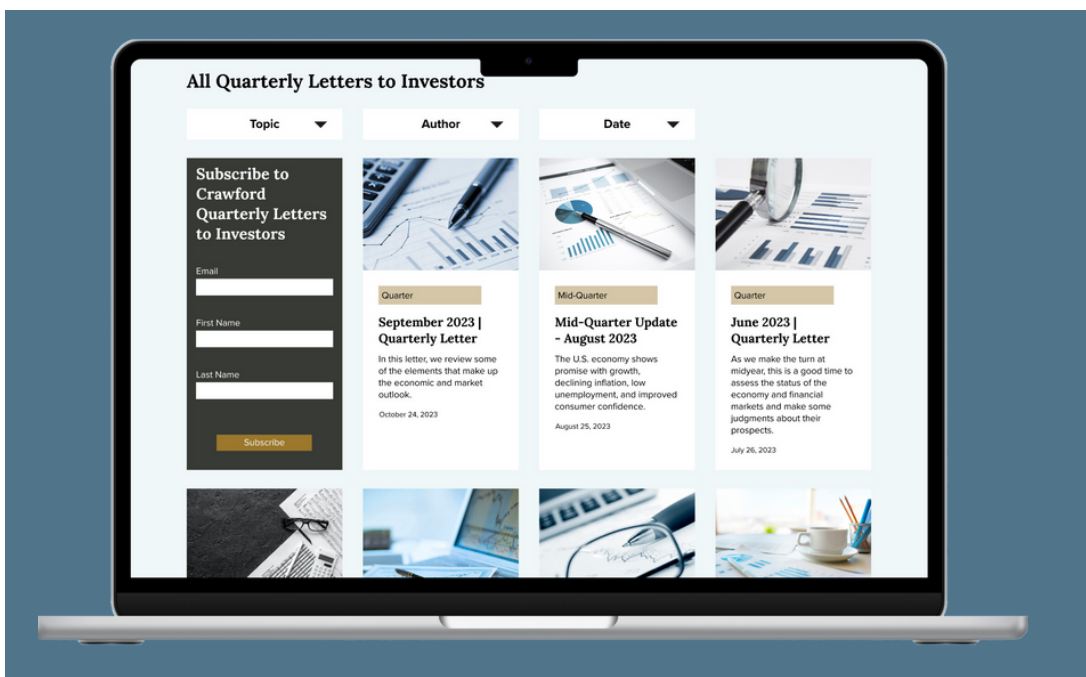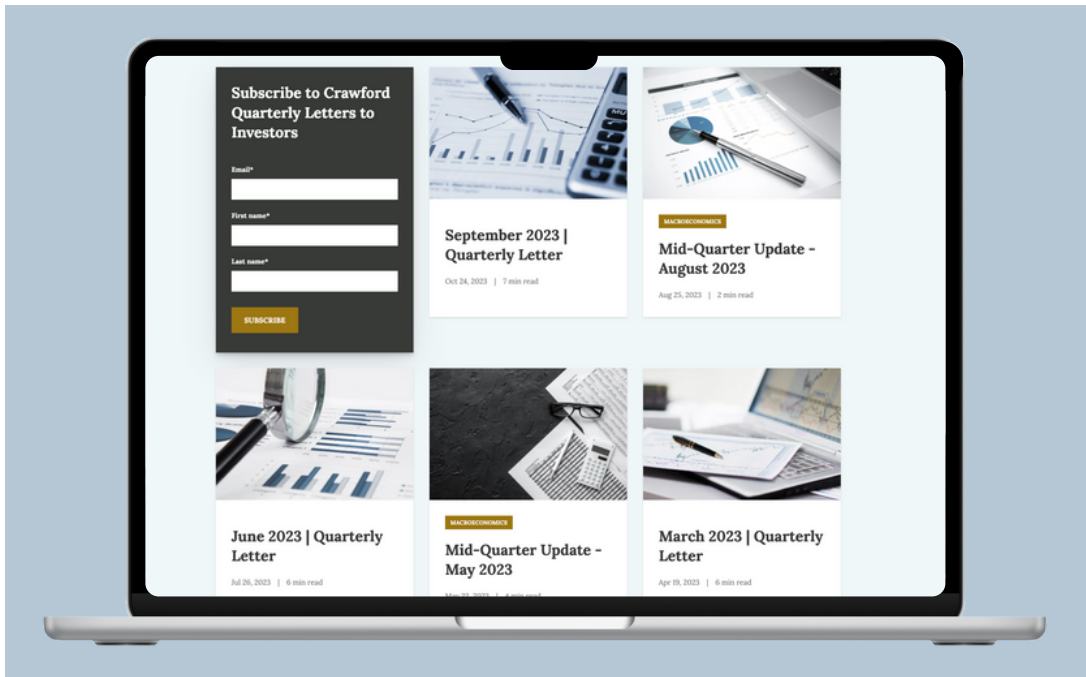
37   **Quarterly Letter Example**

The landing page was changed to match the others with added read time as well as the blue overlay on top of the background photo.
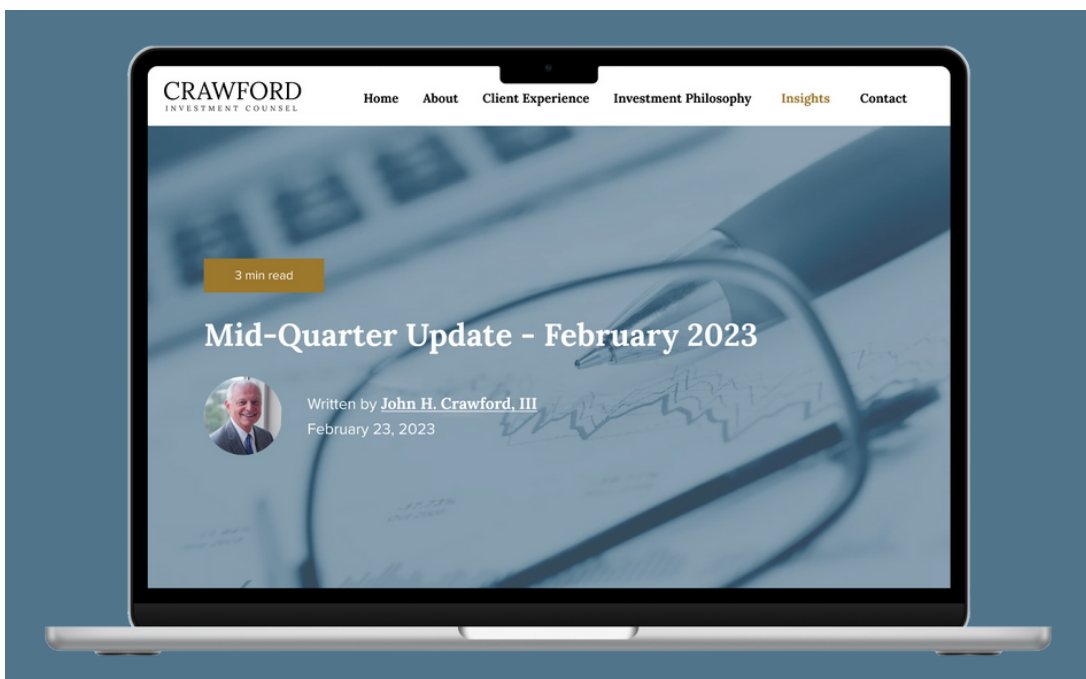
38   Quarterly Letter Example

The buttons were simplified into icons for PDF download and sharing. Throughout the copy, there are important terms that are highlighted for readers to easily skim for information.
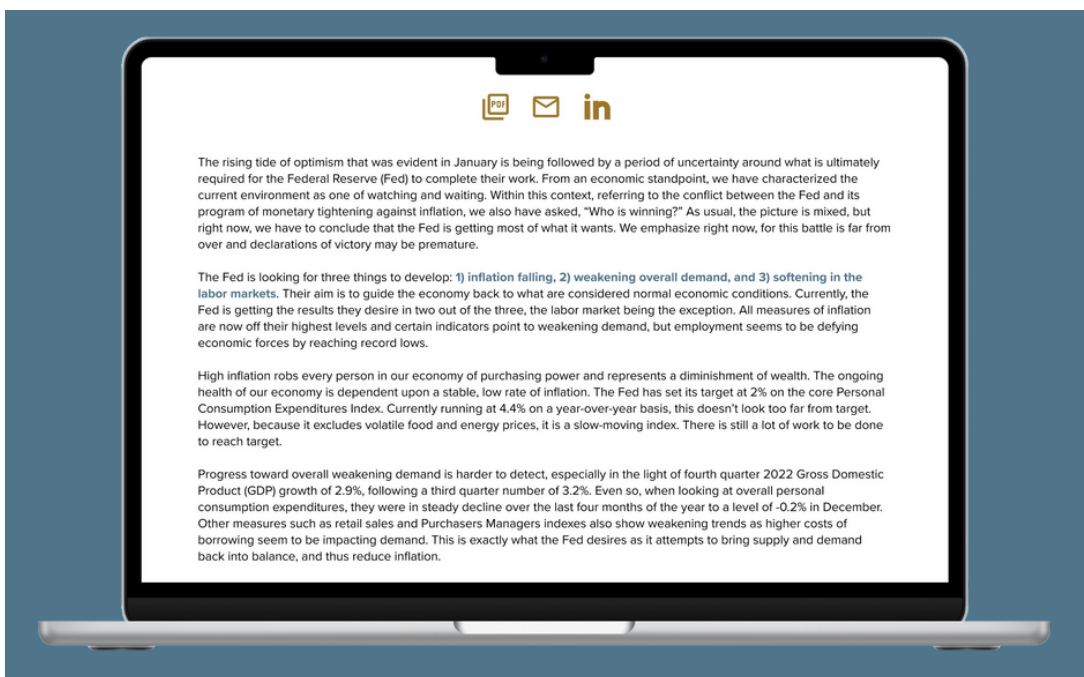
39   **Quarterly Letter Example**

A photo was added for interest and updated the "Subscribe" box and bottom navigation to match the rest of the Insights pages.
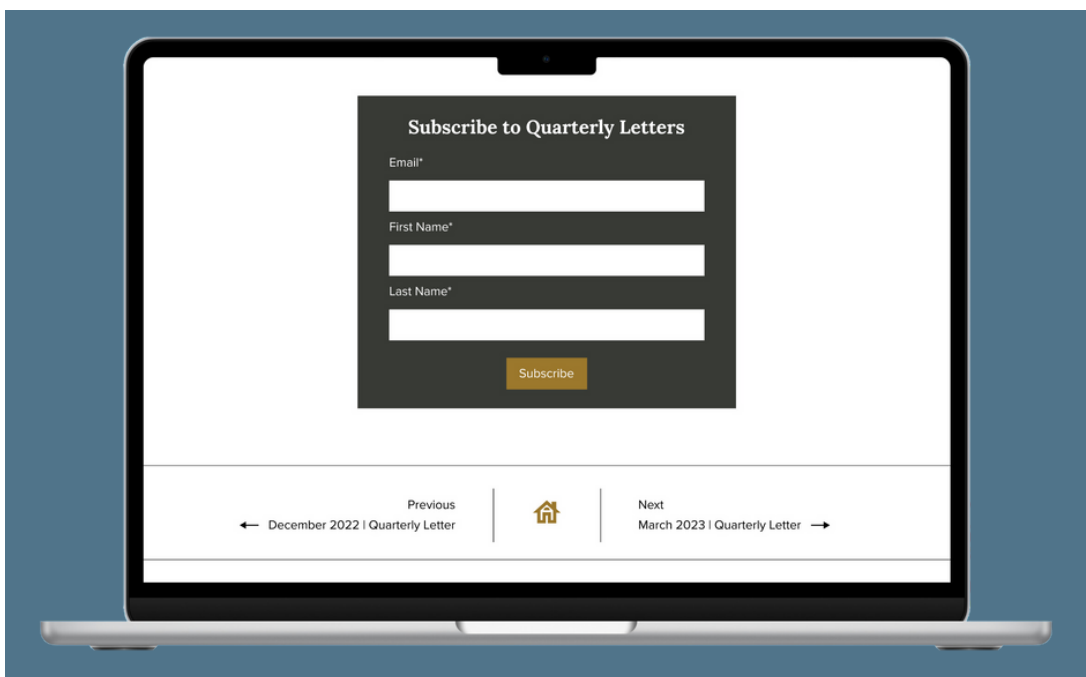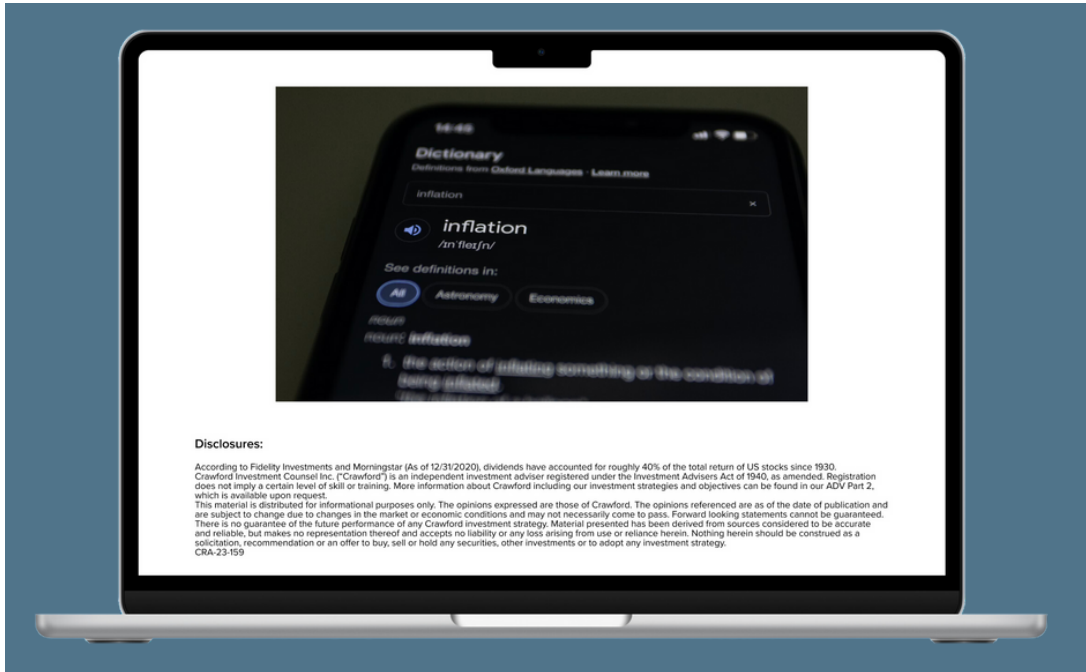
40 **Media Library**

The "Media Library" page was moved under the Insights tab instead of having its own tab. The landing page was also updated to match the same format as the other updated pages.
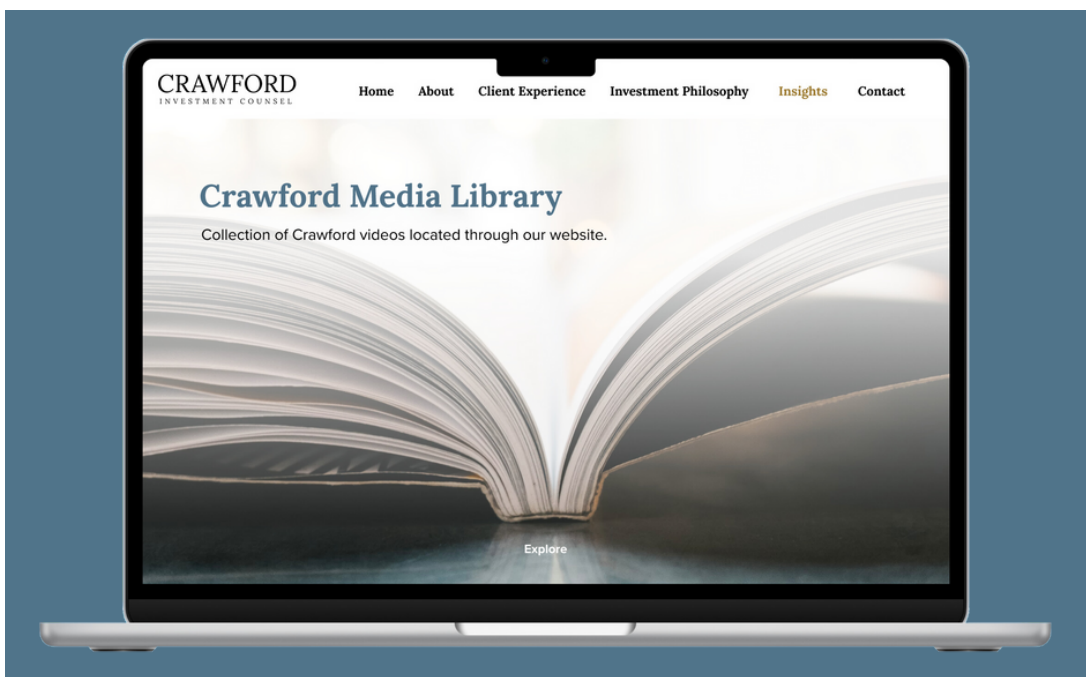
41   **Media Library**

The new layout for the library shows all of the videos at first which can then can be filtered down. There was also an added button to see all media at once.
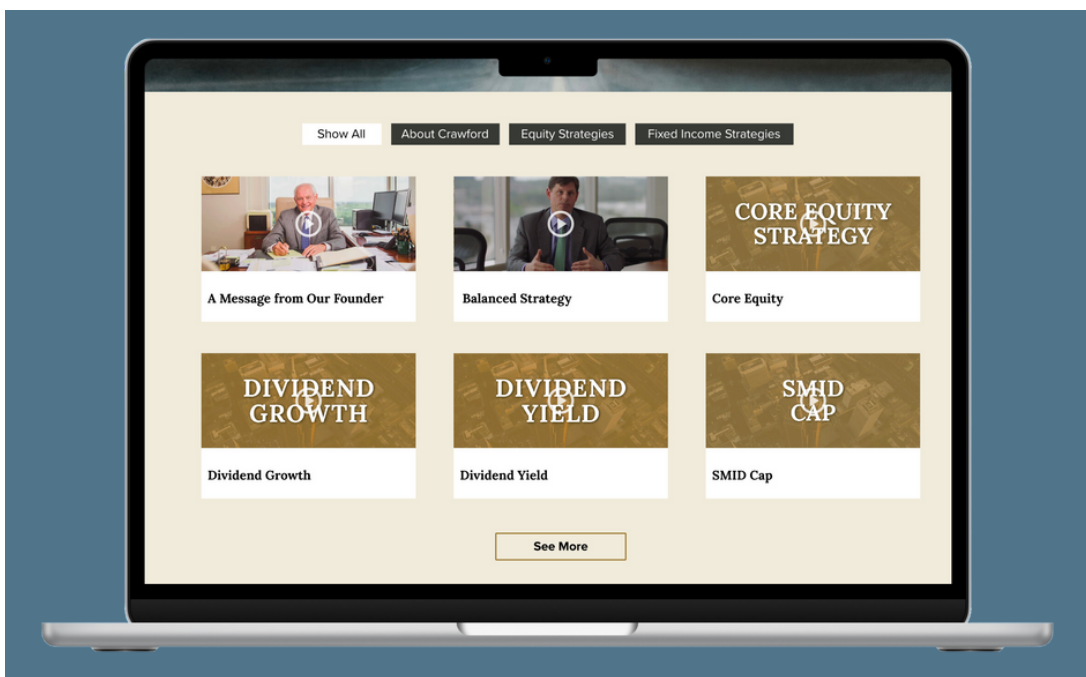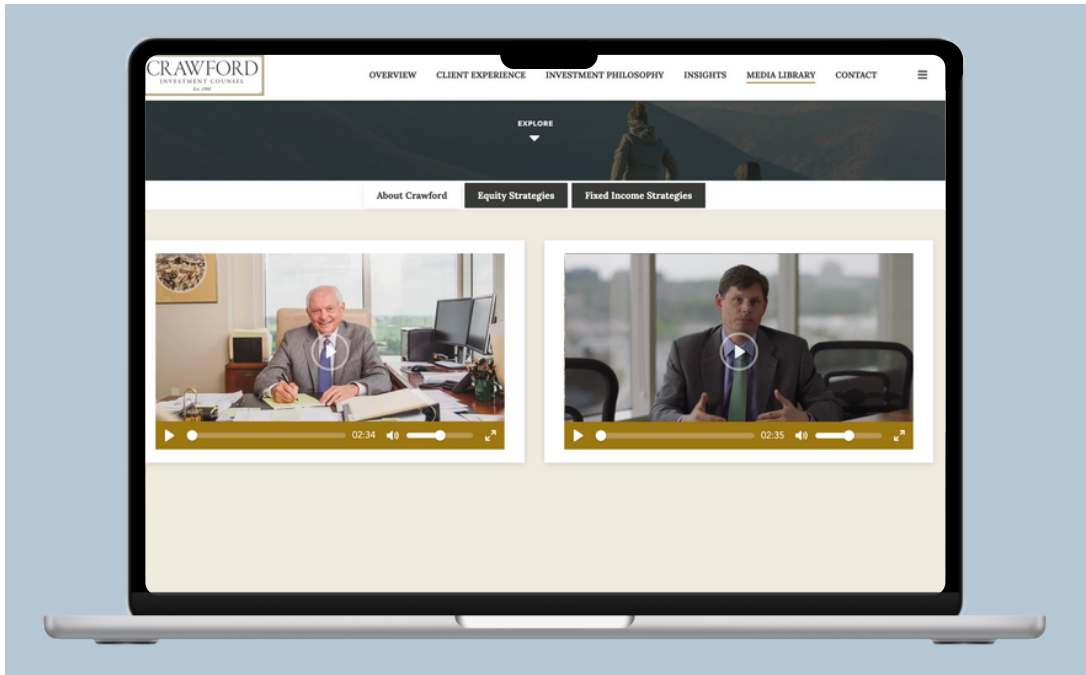
42   **Economic & Market Environment - Audio Review**

The landing page was updated to match the new look and feel, and a subtitle was also added.
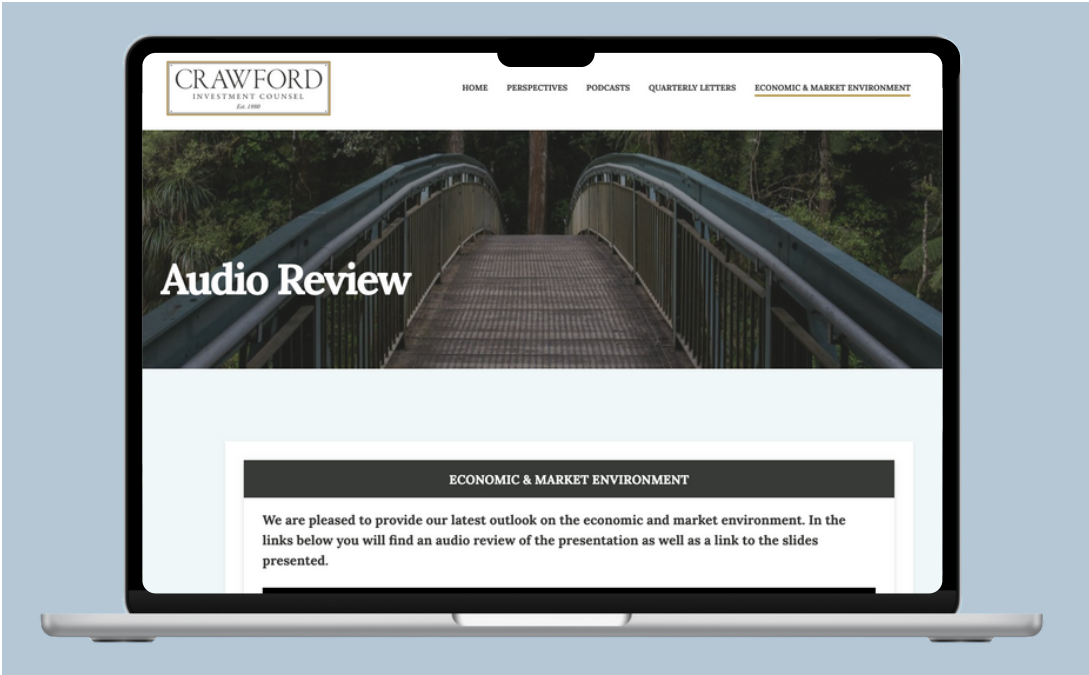
43   Economic & Market Environment - Audio Review

The text was simplified, and there a new button look has been added.
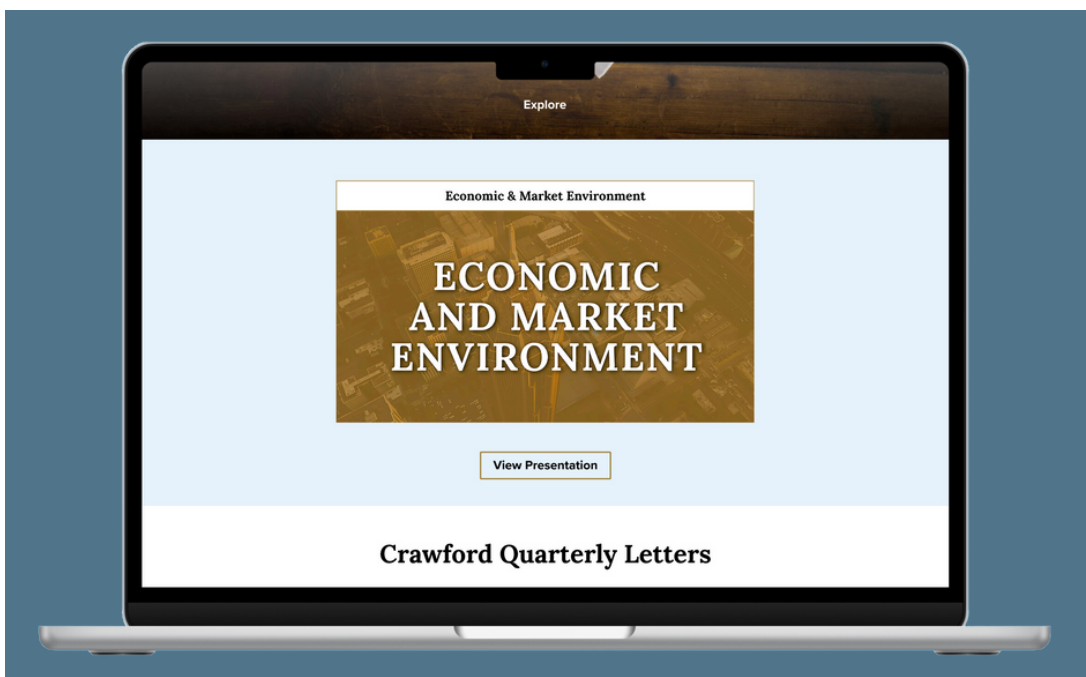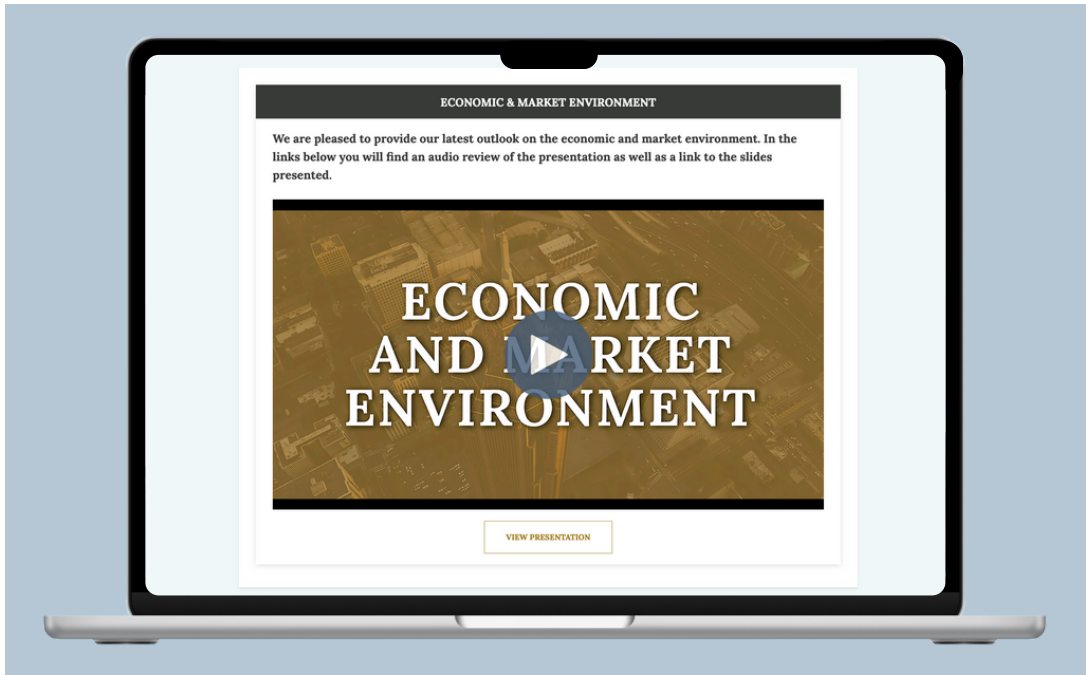
44   **Economic & Market Environment - Audio Review**

There are new tags indicating when the Quarterly Letters were released. New blurbs were added to summarize the Quarterly letter. The publishing date and read time were stretched over one line instead of two.
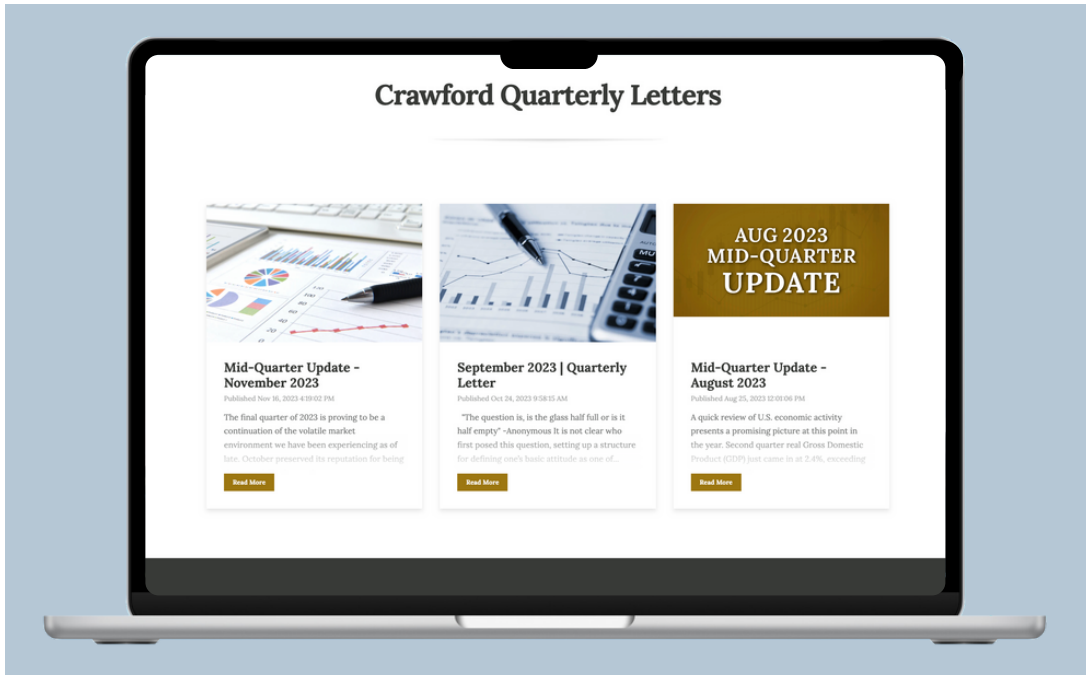
45   **Economic & Market Environment - Presentation**

A matching landing page was added.
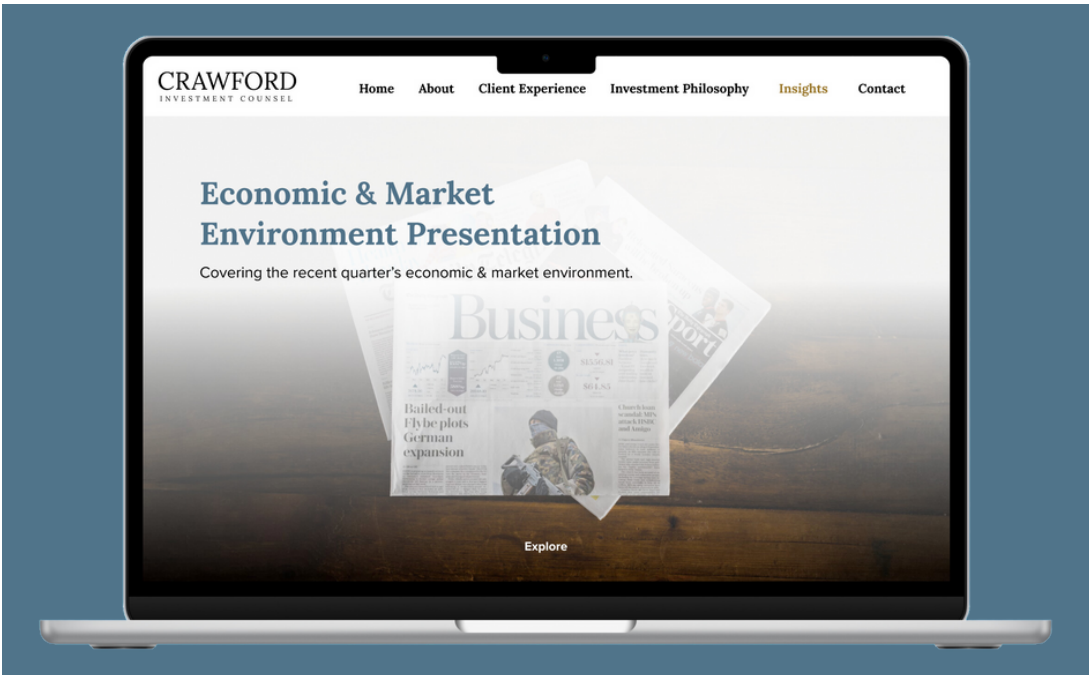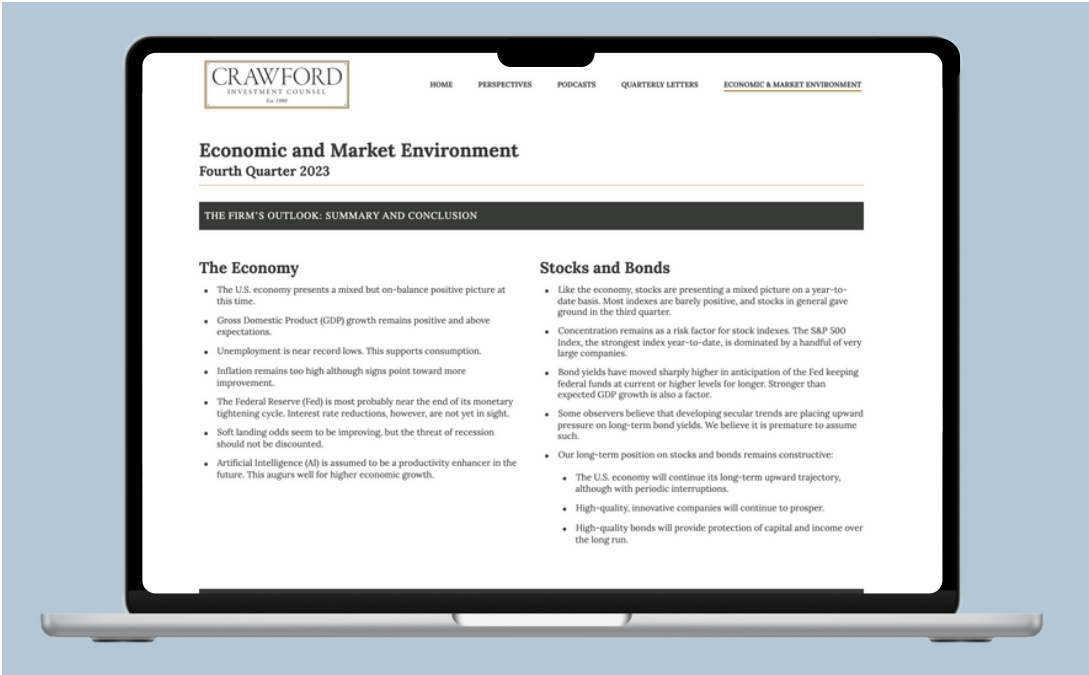
46 **Economic & Market Environment - Presentation**

Instead of scrolling endlessly through the PDF style layout, the format was changed to be a slideshow for easier access to the information.
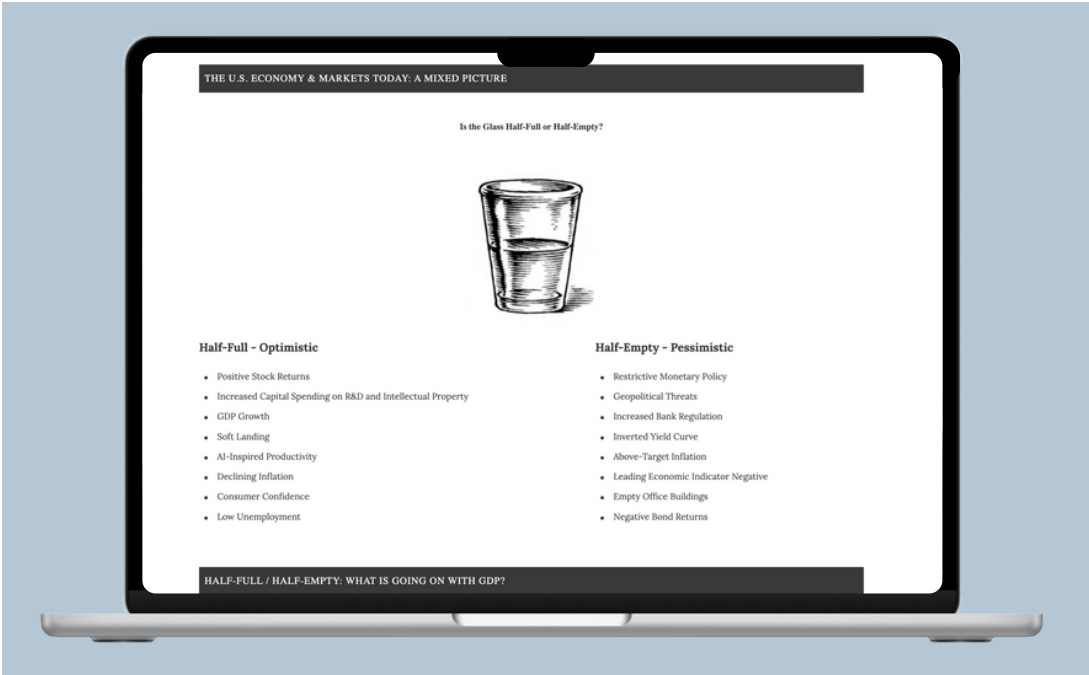
47   **Contact Us**

The landing page was updated to match the new format.
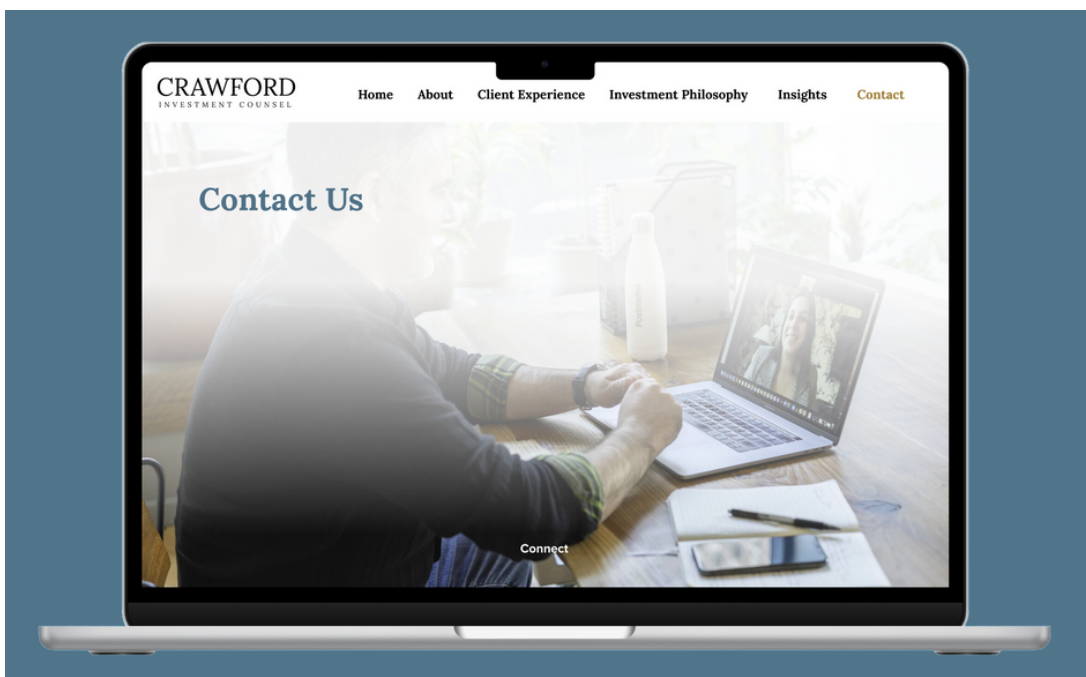
48 **Contact Us**

General inquiries were moved towards the top of the page as this form is more important for users.
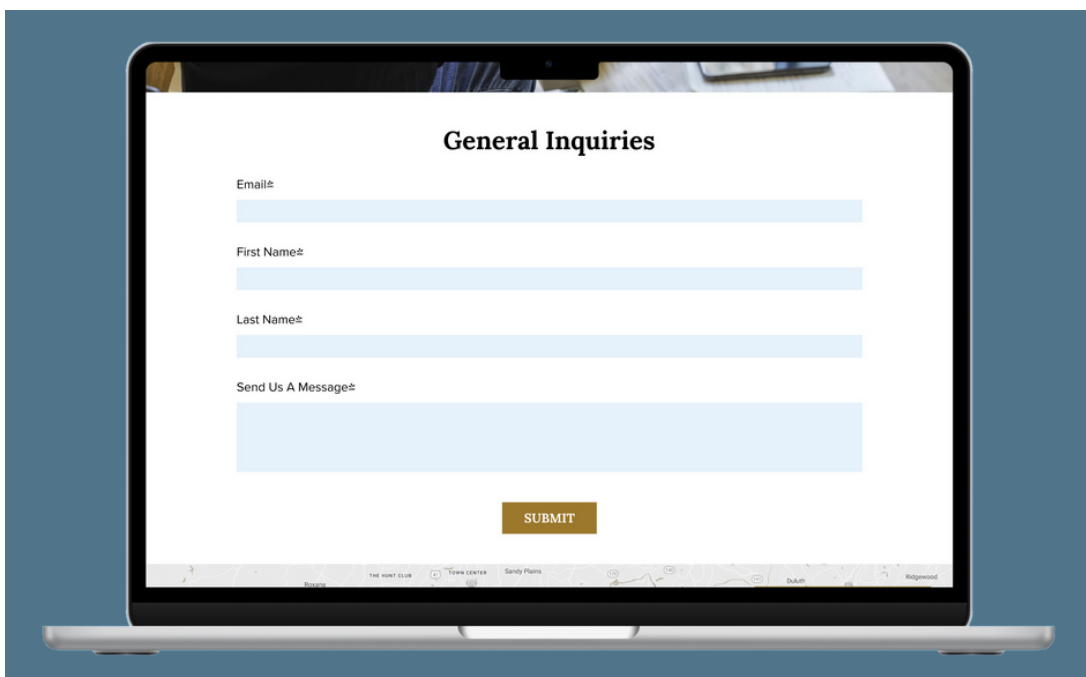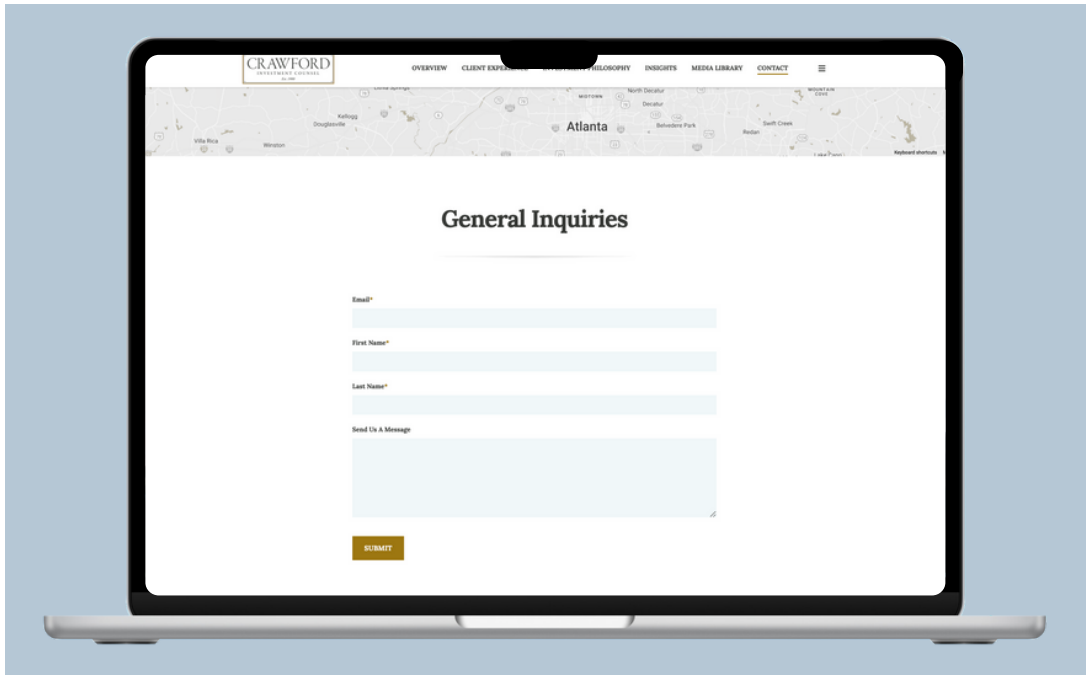
49 **Headquarters Location**

the address was combined with the map to lessen negative space.

User Testing

To accompany our website redesign, we have researched user testing platforms and compiled a list of potential tasks to be assigned. User testing will provide insights into how users navigate the website and what they think about Crawford's website usability. This data is vital as it can help Crawford to see if their website is easily usable for clients to find necessary information. Both the current Crawford website and the proposed website redesign can be user-tested by people within Crawford's target audience.

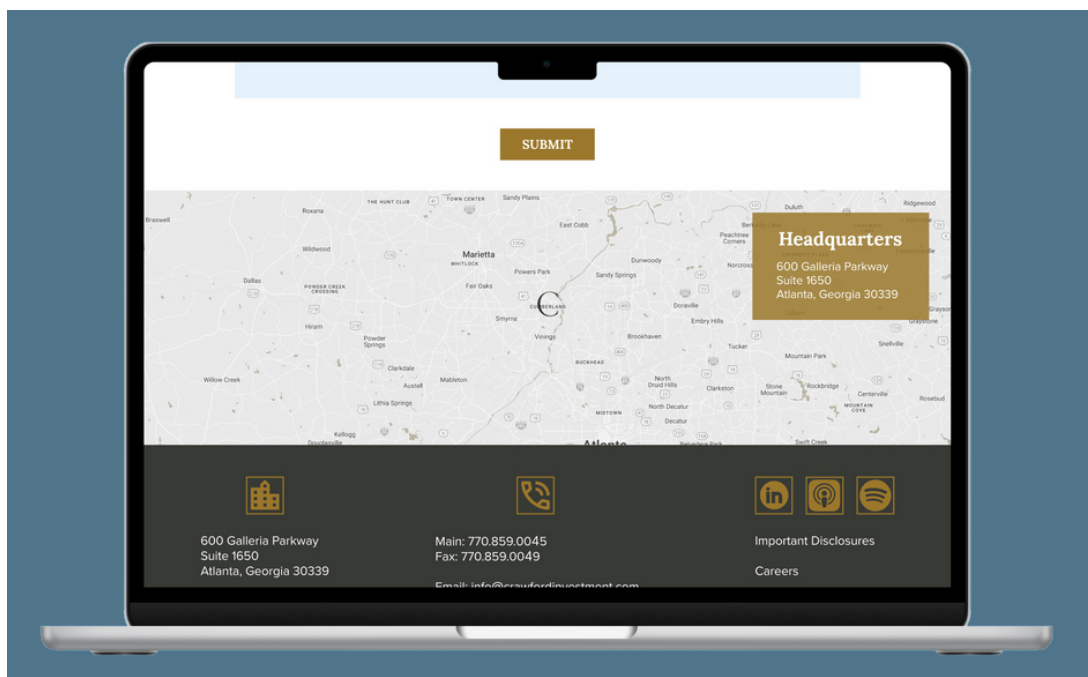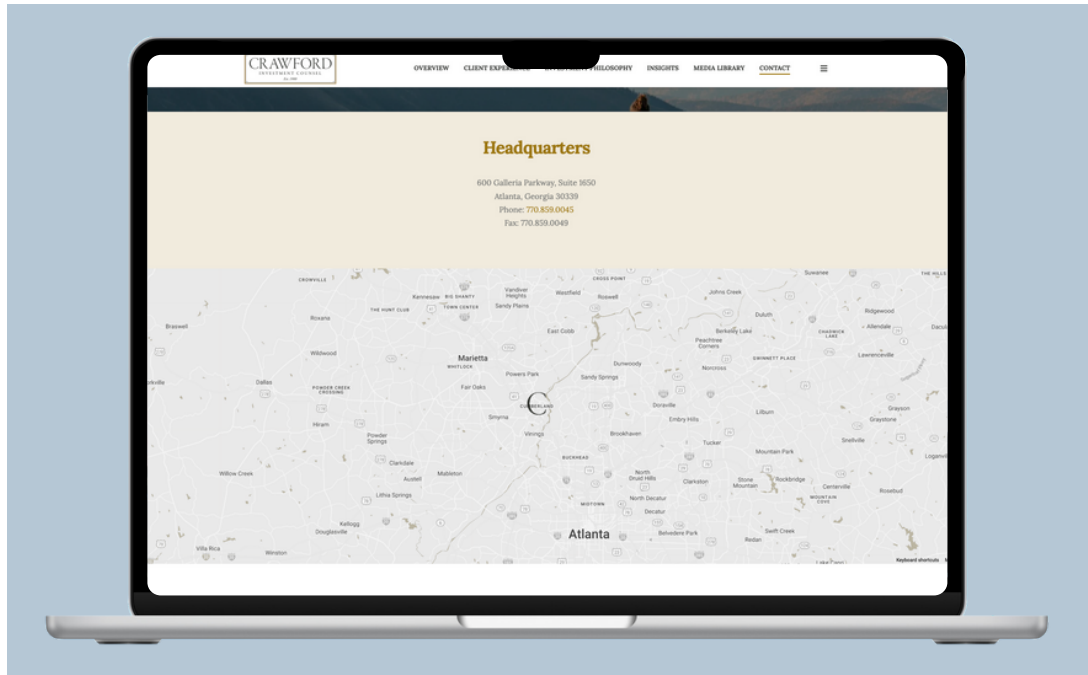To test the current Crawford website, a code snippet must be added to Crawford's website to connect <u>Maze</u>, our chosen user testing platform, and embed live surveys for user feedback. The code snippet. and further instructions can be found on their <u>instruction page</u>. Information about user testing a (Figma) prototype can also be found on Maze's website.

We have also created a list of potential tasks and questions to be asked within the user testing study. These tasks and questions can be modified to best fit Crawford's goals for the website.

Tasks
- Perpetual Accumulation Approach:
  - You're in search of an investment management firm, and a trusted friend suggests considering Crawford Investment Counsel. Curious, you ask them what makes Crawford special. They excitedly explain that Crawford has a unique proprietary investment strategy used to help clients achieve their investment goals and successful outcomes. Identify the name of this approach.
- Statistics:
  - What is Crawford Investment Counsel's <u>client retention rate</u>? (97%)
- Make insights more engaging:
  - Perspectives
    - You are interested in reading more about the origins of Crawford's <u>dividend growth strategy,</u> find out...
      - the old saying used to introduce the story of the origin of the Dividend Growth strategy ("necessity is the motherhood of invention")
      - what year the strategy originated in and by who (1970, John Crawford)
  - Podcasts
    - While stuck in heavy traffic during your commute to work, you decide to tune into one of Crawford's podcasts for a more engaging journey. What area of the market does Crawford believe to be the ultimate "<u>golden opportunity</u>"? (small cap stocks)
- Navigation - finding the Our Team page
  - You are interested in Crawford's dividend growth strategy, find out who is your portfolio manager. (Jon D. Christiansen)
  - What is the phone number you would use to contact the Portfolio Manager for the Dividend Growth Strategy? ((770) 859-0890)

Questions
- What does Crawford Investment Counsel do?
- What was the most difficult task?
- What was your first impression of the navigation?
- Was the Contact or Firm Overview page where you expected it to be?
- When thinking about Crawford's investment strategy, would information about this proprietary research-based approach be under the Client Experience tab or Investment Philosophy tab?