

COMMENTS

Goals

- introduce new users to site
- allow returning users to quickly find information
- show what has changed

Actions

- navigate to main items
- navigate to utility navigation
- view all items in a given topic
- select updated item

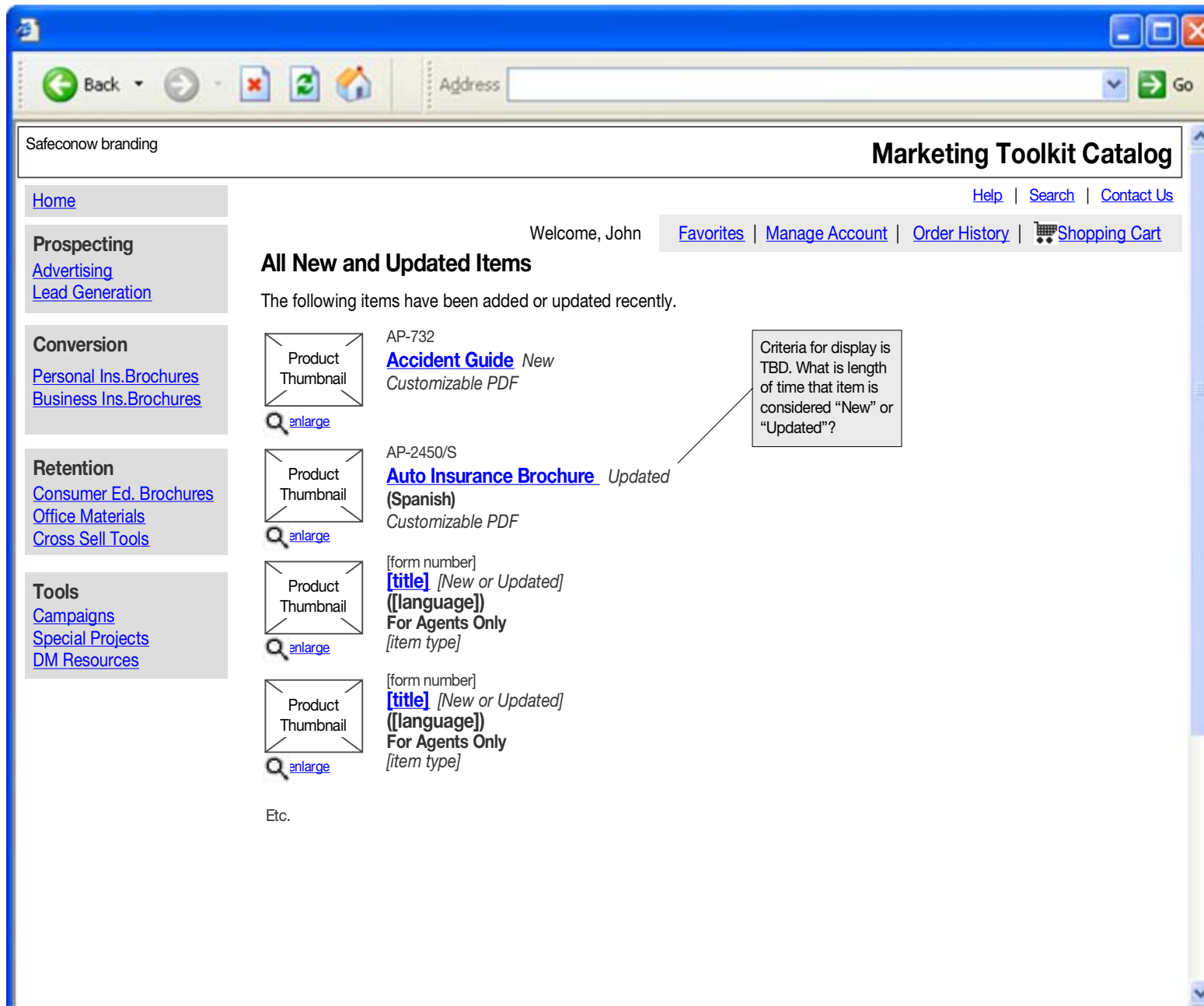
Design Considerations

Thumbnail size may depend on available thumbnails from Cumulus DB. If a custom size is possible, this should be confirmed in the design phase.

Marketing Toolkit Catalog Schematics (version 8)



1.1 Updates and Additions



COMMENTS

Goals

- display all new or recently updated items

Actions

- select or enlarge product

Design Considerations

Page may have 10-20 items. Should follow same format as all other pages with a product index (same thumbnail size).

This document shows informational relationships only and does not represent final design or layout.

Prepared by POP
Revised: Sept. 17, 2004

Marketing Toolkit Catalog Schematics (version 8)



3.0 Personal Ins. Brochure (sample second level page)

COMMENTS

Goals

- allow easy selection of product line

Actions

- select product line

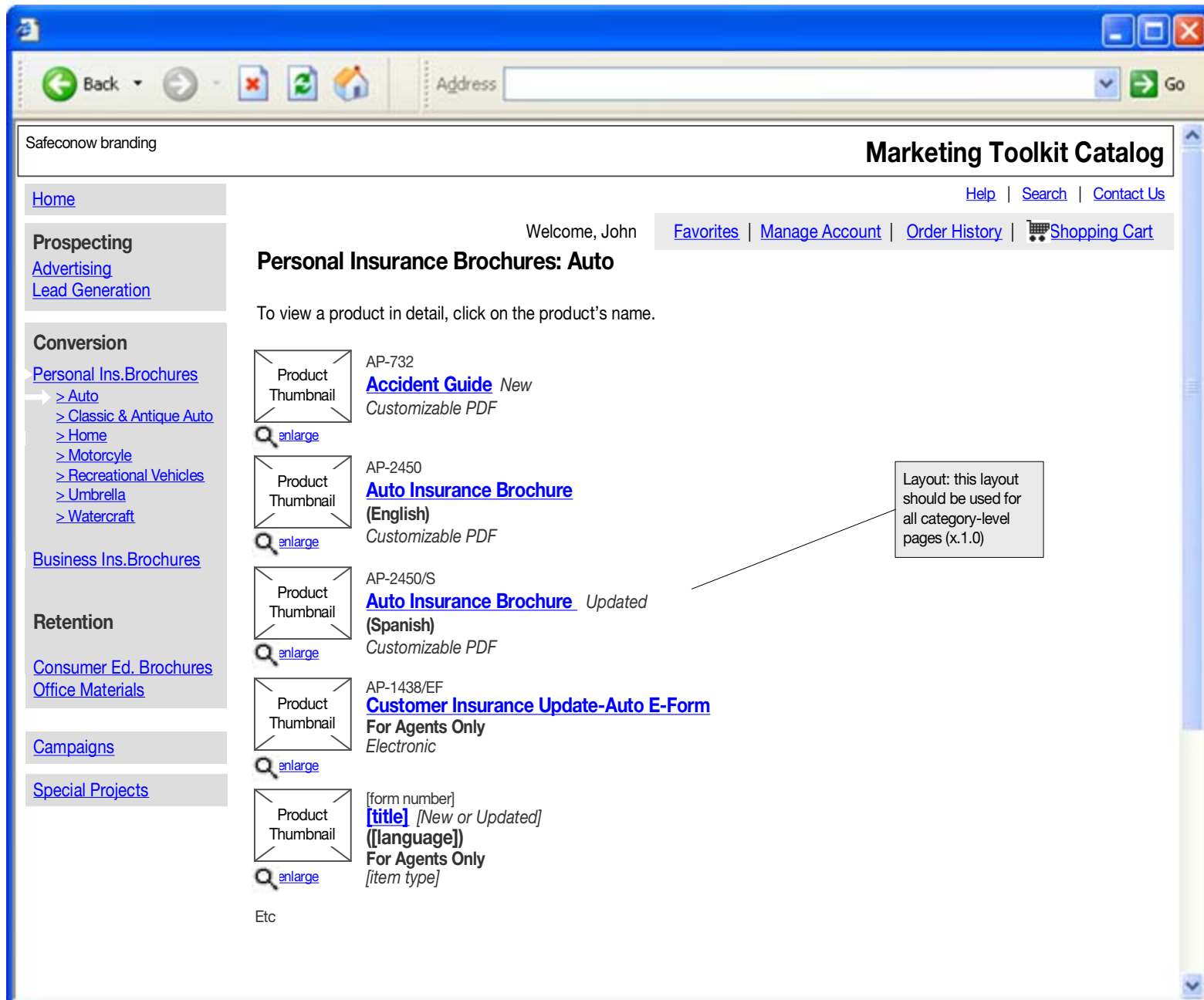
Design Considerations

Thumbnails on this page are independent of Cumulus DB and so can be custom sized.

NEED CONTENT TOOL TO ALLOW COPY ON CATEGORY PAGES TO BE EDITED. THIS WOULD APPLY TO ALL CATEGORY PAGES.

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Layout: this layout should be used for all category-level pages (x.1.0)

Marketing Toolkit Catalog Schematics (version 8)

15.1.0 Item Detail (Custom)



The screenshot shows a web browser window with the following elements:

- Browser Address Bar:** Shows 'Back', 'Address', and 'Go' buttons.
- Page Header:** 'Safeconow branding' on the left and 'Marketing Toolkit Catalog' on the right with links for 'Help', 'Search', and 'Contact Us'.
- Navigation Menu:** 'Home', 'Prospecting' (with sub-links for Advertising and Lead Generation), 'Conversion' (with sub-links for Personal Ins. Brochures, Auto, Classic & Antique Auto, Home, Motorcycle, Recreational Vehicles, Umbrella, and Watercraft), 'Business Ins. Brochures', 'Retention' (with sub-links for Consumer Ed. Brochures and Office Materials), 'Campaigns', and 'Special Projects'.
- Product Title:** 'Personal Insurance Brochure (English) - Customizable PDF'.
- Product ID:** 'AP-2450'.
- Product Image:** A placeholder box labeled 'Product Thumbnail' with an 'enlarge' button and an 'Add to favorites' button.
- Product Description:** A block of placeholder text starting with 'Safeco wants a comment after customizable and electronic and printed... (What's This?) — link to popup window with content — for every type of item — audiot/video, all types of items.' followed by 'Auto Insurance Brochure (dated)' and 'Product Thumbnail'.
- Annotations:**
 - A callout box says: 'Safeco wants a comment after customizable and electronic and printed... (What's This?) — link to popup window with content — for every type of item — audiot/video, all types of items.'
 - Another callout says: 'Make this a popup window. See comment at left.'
 - A third callout says: 'enlarges image (same as enlarge button)'.
 - A fourth callout says: 'This document can be customized with your agency's contact information at no cost.'
 - A fifth callout says: 'This should show up on customizable PDFs'.
- Buttons:** 'enlarge', 'Add to favorites', and 'Download uncustomized version'.
- Related Items Section:**
 - Item 1: 'Product Thumbnail' for 'AP-2450 Consumer Education (English) Customizable PDF' with an 'enlarge' button.
 - Item 2: 'Product Thumbnail' for '[form number] [title] ([language]) For Agents Only [item type]' with an 'enlarge' button.

COMMENTS

Goals
- display all information necessary to make purchasing or acquisition decision

Actions
- enlarge (preview) product
- add to favorites
- customize item

Design Considerations
Thumbnail size may depend on available thumbnails from Cumulus DB. If a custom size is possible, this should be confirmed in the design phase.

Data Displayed
Includes:
Form number
Title
Updated or new (optional)
Language (optional)
For Agents designation (this should not display on the page, should only control what they see)
Item Type
Narrative Description

Related Items
These might be pulled based on product category or campaign relationship.

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Marketing Toolkit Catalog Schematics (version 8)



15.1.1 Enter/Confirm Custom Information

The screenshot shows a web browser window displaying the 'Marketing Toolkit Catalog' page. The browser's address bar is empty, and the page title is 'Safeconow branding Marketing Toolkit Catalog'. The page features a navigation menu on the left with categories like 'Prospecting', 'Conversion', 'Retention', and 'Campaigns'. The main content area is titled 'Personal Insurance Brochures: Auto' and includes a 'Customize Information for:' section for 'Auto Insurance Brochure (English)'. A 'Product Thumbnail' placeholder is shown. Below this is a form with fields for Agency Name, Address, City, State, Zip, Phone, Fax, Website, E-mail, and Prospect Company Name. There are radio buttons for 'Choose Color' (Black and White or Color) and a 'Preview' button. A callout box points to the form fields with the text: 'Areas are pre-populated if information has been entered previously.'

COMMENTS

Areas are pre-populated if information has been entered previously.

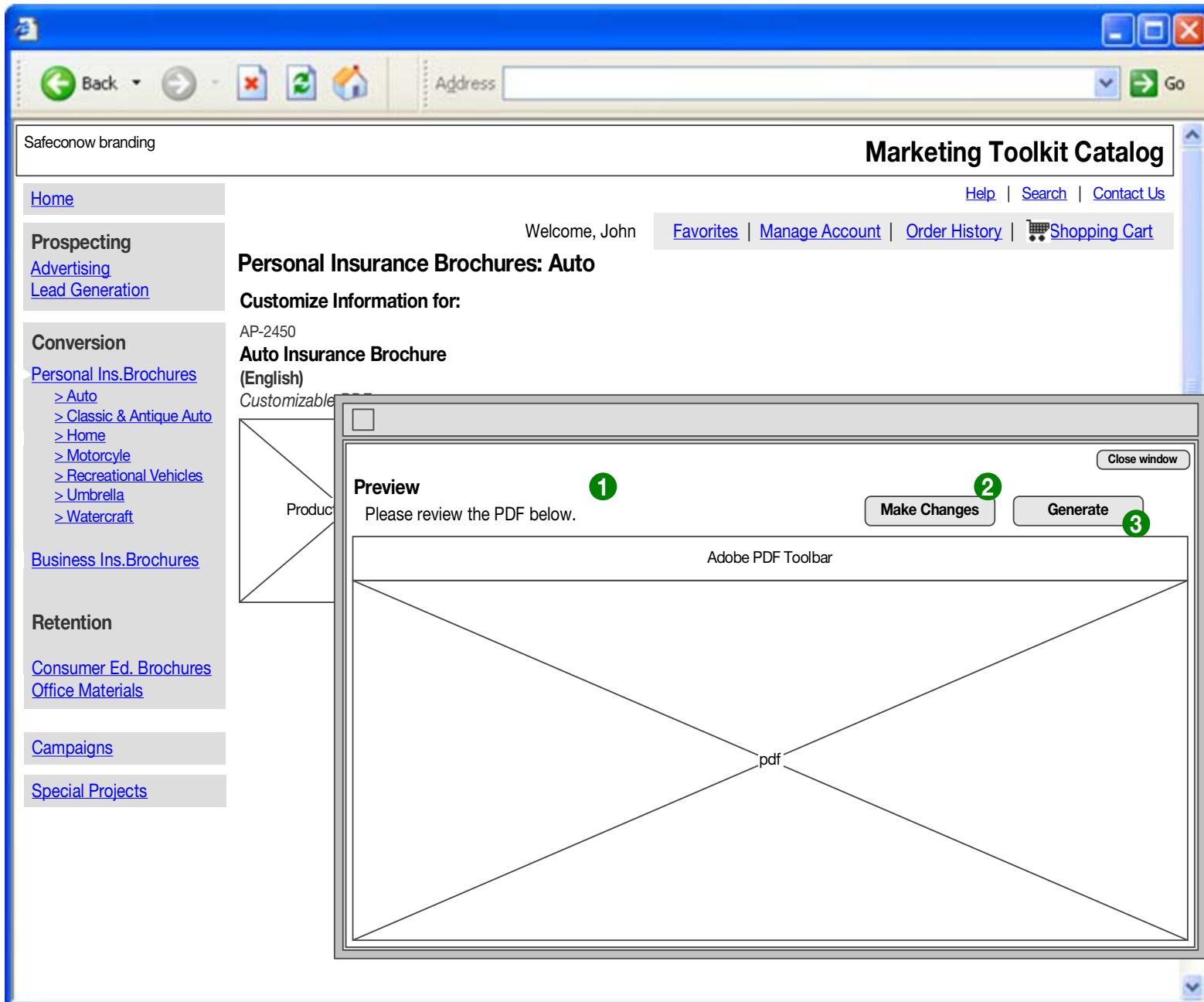
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Marketing Toolkit Catalog Schematics (version 8)



15.1.2 Preview



COMMENTS

- 1 Pop-up window with PDF inside. (In frameset?)
- 2 Make changes closes window and takes focus back to originating page.
- 3 Generate closes window and changes originating window to 15.1.3.0 Fulfillment Options.

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Marketing Toolkit Catalog Schematics (version 8)



15.1.3.0 Fulfillment Options

COMMENTS

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Marketing Toolkit Catalog

Safeconow branding

[Home](#)

Prospecting
[Advertising](#)
[Lead Generation](#)

Conversion
[Personal Ins. Brochures](#)
→ [Auto](#)
 [Classic & Antique Auto](#)
 [Home](#)
 [Motorcycle](#)
 [Recreational Vehicles](#)
 [Umbrella](#)
 [Watercraft](#)

[Business Ins. Brochures](#)

Retention
[Consumer Ed. Brochures](#)
[Office Materials](#)

[Campaigns](#)

[Special Projects](#)

Welcome, John

Personal Insurance Brochures: Auto

AP-2450
Auto Insurance Brochure NEW!
(English)
[Print](#)

Product Thumbnail

[enlarge](#) [Add to favorites](#)

Consectetur adipisicing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum.

Prices
Each unit contains 500 envelopes.

Quantity	Price Each
1 - 24	Free
25 or more	\$0.89

Quantity

[Add to Cart](#)

[Help](#) | [Search](#) | [Contact Us](#)

[Favorites](#) | [Manage Account](#) | [Order History](#) | [Shopping Cart](#)

If no related items are available, this area should not display

Related Items

Product Thumbnail

AP-2450
[Consumer Education](#)
(English)
Customizable PDF

[enlarge](#)

Product Thumbnail

[form number]
[\[title\]](#)
([language])
For Agents Only
[item type]

[enlarge](#)

COMMENTS

Goals

- display all information necessary to make purchasing or acquisition decision
- clearly show pricing options

Actions

- select product
- enter quantity
- enlarge (preview) item
- add to favorites

Design Considerations

Thumbnail size may depend on available thumbnails from Cumulus DB. If a custom size is possible, this should be confirmed in the design phase.

Data Displayed

Includes:

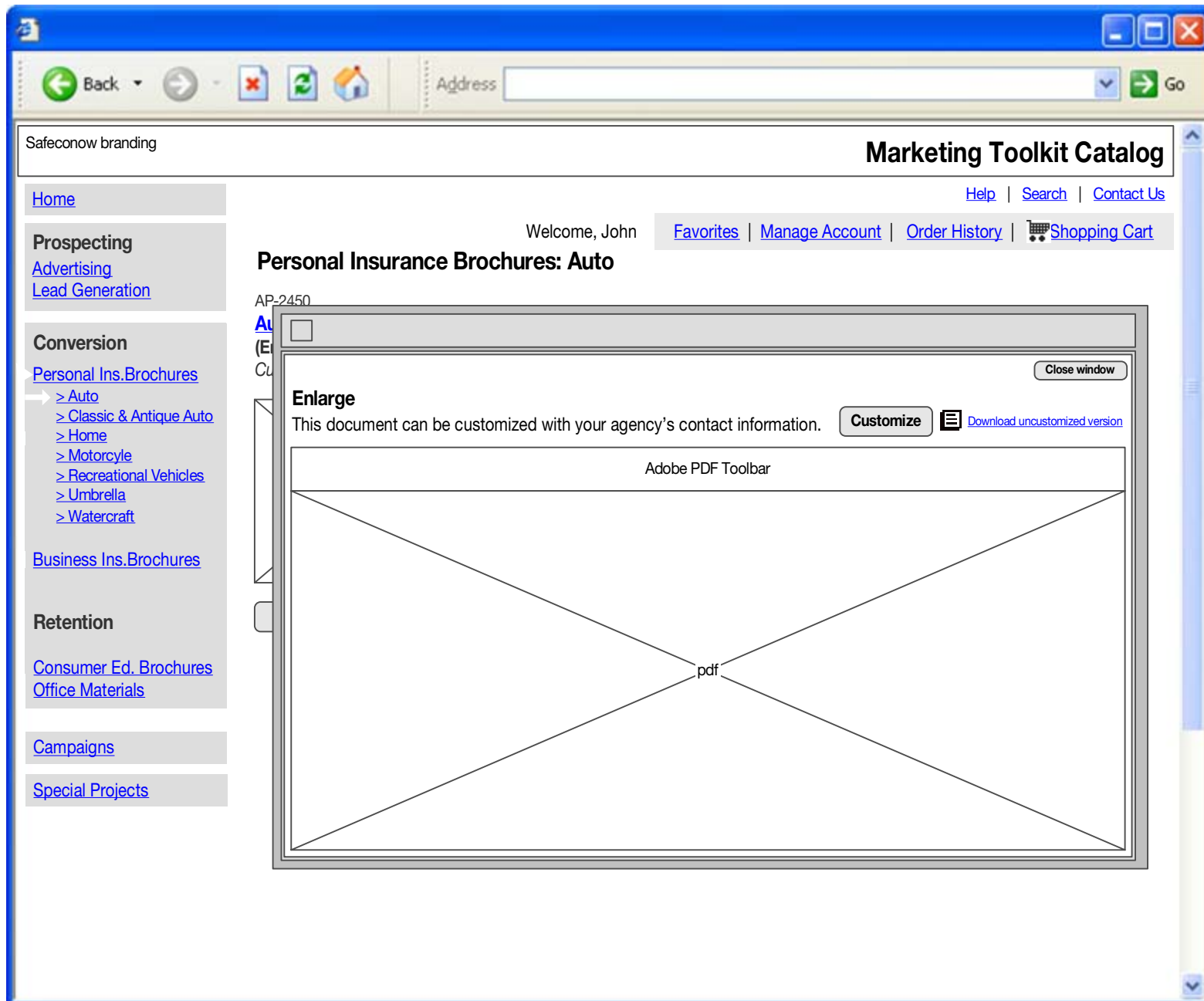
- Form number
- Title
- Updated or new (optional)
- Language (optional)
- For Agents designation
- Item Type
- Narrative Description

Related Items

These might be pulled based on product category or campaign relationship.

Marketing Toolkit Catalog Schematics (version 8)

15.1.4 Preview



COMMENTS

Goals

- allow previewing of pdf document (prior to custom info inclusion)
- ensure visitor knows that item can be customized

Actions

- close window
- go to customize screen (closes window and reloads parent page)

Functionality

Popup window should be re-sizable by user.

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Marketing Toolkit Catalog Schematics (version 8)

8.0 Campaigns



COMMENTS

Goals

- provide edited sets of marketing collateral for various audience needs

Actions

- select product title

Content

Page content will vary as new campaigns are added or old ones removed.

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Marketing Toolkit Catalog Schematics (version 8)

8.1.0 Build a Campaign: Auto



Safeconow branding

Marketing Toolkit Catalog



Home [Help](#) | [Search](#) | [Contact Us](#)

Welcome, John [Favorites](#) | [Manage Account](#) | [Order History](#) | [Shopping Cart](#)


Build a Campaign: Auto

The following documents are available in this catalog. To build a campaign, check the items you would like, then click "Customize Selection."


Personal Insurance Brochures

-  AP-732 [Accident Guide](#) *New*
Customizable PDF
[enlarge](#)
-  AP-2450/S [Auto Insurance Brochure](#) *Updated*
(Spanish)
Customizable PDF
[enlarge](#)

Business Insurance Brochures

-  [form number] [\[title\]](#) *[New or Updated]*
[(language)]
For Agents Only
[item type]
[enlarge](#)

Consumer Education Brochures

-  AP-732 [Accident Guide](#) *New*
Customizable PDF
[enlarge](#)

[Customize Selected Items](#)

COMMENTS

Goals

- show all available collateral within a given category
- enable building of custom package

Actions

- select item

Functionality

Page is essentially a sorted search results page, sorted by business line or site category.

Design Considerations

Thumbnail size may depend on available thumbnails from Cumulus DB. If a custom size is possible, this should be confirmed in the design phase.

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Marketing Toolkit Catalog Schematics (version 8)

9.0 Favorites



Safeconow branding









Marketing Toolkit Catalog

[Home](#) [Help](#) | [Search](#) | [Contact Us](#)

Welcome, John [Favorites](#) | [Manage Account](#) | [Order History](#) | [Shopping Cart](#)

Favorites

You have added the following documents to your favorites list. To add a single item to your cart, click on the item title. To add multiple items to your cart at once, check the items you would like, then click "Customize Selection."

<input type="checkbox"/>		AP-732 Accident Guide <i>New</i> <i>Customizable PDF</i>	 Remove
<input type="checkbox"/>		AP-2450/S Auto Insurance Brochure <i>Updated</i> <i>(Spanish)</i> <i>Customizable PDF</i>	 Remove
<input type="checkbox"/>		[form number] [title] <i>[New or Updated]</i> <i>[(language)]</i> <i>For Agents Only</i> <i>[item type]</i>	 Remove
<input type="checkbox"/>		AP-732 Accident Guide <i>New</i> <i>Customizable PDF</i>	 Remove

[enlarge](#) [enlarge](#) [enlarge](#) [enlarge](#)

[Customize Selected Items](#)

COMMENTS

Goals

- show all available collateral in favorites list
- enable single or multiple actions

Actions

- select item
- select items for multiple

Functionality

Page is essentially a sorted search results page, sorted by business line or site category.

Design Considerations

Thumbnail size may depend on available thumbnails from Cumulus DB. If a custom size is possible, this should be confirmed in the design phase.

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Marketing Toolkit Catalog Schematics (version 8)



10.0 Manage Account

Safeconow branding

Marketing Toolkit Catalog

Home [Help](#) | [Search](#) | [Contact Us](#)

Welcome, John [Favorites](#) | [Manage Account](#) | [Order History](#) | [Shopping Cart](#)

Manage Account

We have the following account information on record. To change an address, select "Edit Address" next to the appropriate address. To remove a shipping address, select the "Remove" next to the appropriate address. At this time, Safeco only allows one Billing Address per account.

Shipping Address	Billing Address	Customized Printing
Helen Acher Company Name 12345 Bills Seattle, WA 98115 Edit Address <input type="checkbox"/> Remove	Helen Acher Company Name 8720 Radiom Drive St. Louis, MO 63120 Edit Address	Helen Acher Company Name 8720 Radiom Drive St. Louis, MO 63120 Edit Information
Helen Acher Company Name 12345 Bills Seattle, WA 98115 Edit Address <input type="checkbox"/> Remove		
Helen Acher Company Name 12345 Bills Seattle, WA 98115 Edit Address <input type="checkbox"/> Remove		

[Add New Address](#)

Exact fields to be displayed to come from existing Safeco site.

COMMENTS

Goals
- enable quick scanning, editing, and management of available addresses

Actions
- edit, remove or add shipping address
- edit billing address
- edit custom information

Functionality
On Remove, page is reloaded with address removed.

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COMMENTS

Goals

- allow editing of existing address

Actions

- enter required information

Functionality

Fields included should be derived from existing site in conjunction with clients.

Design Considerations

These pages should use new error handling standards (See Dave Huddle, initiative manager)

Marketing Toolkit Catalog Schematics (version 8)

11.0 Shopping Cart



Safeconow branding
Marketing Toolkit Catalog

[Home](#)

Prospecting
[Advertising](#)
[Lead Generation](#)

Conversion
[Personal Ins. Brochures](#)
[Business Ins. Brochures](#)

Retention
[Consumer Ed. Brochures](#)
[Office Materials](#)
[Cross Sell Tools](#)

Tools
[Campaigns](#)
[Special Projects](#)
[DM Resources](#)

Welcome, John

[Favorites](#) | [Manage Account](#) | [Order History](#) | [Shopping Cart](#)

Shopping Cart

Item	Description	Qty	Price Each	Total Price	
AP-732	Accident Guide	<input type="text" value="25"/>	\$.89	\$21.54	Remove
AP-732	Accident Guide	<input type="text" value="10"/>	\$.00	\$00.00	Remove
[form number]	[title]	<input type="text" value="[qty]"/>	\$.xx	\$xx.xx	Remove

Order Subtotal: \$59.95

COMMENTS

Goals
- streamline searching

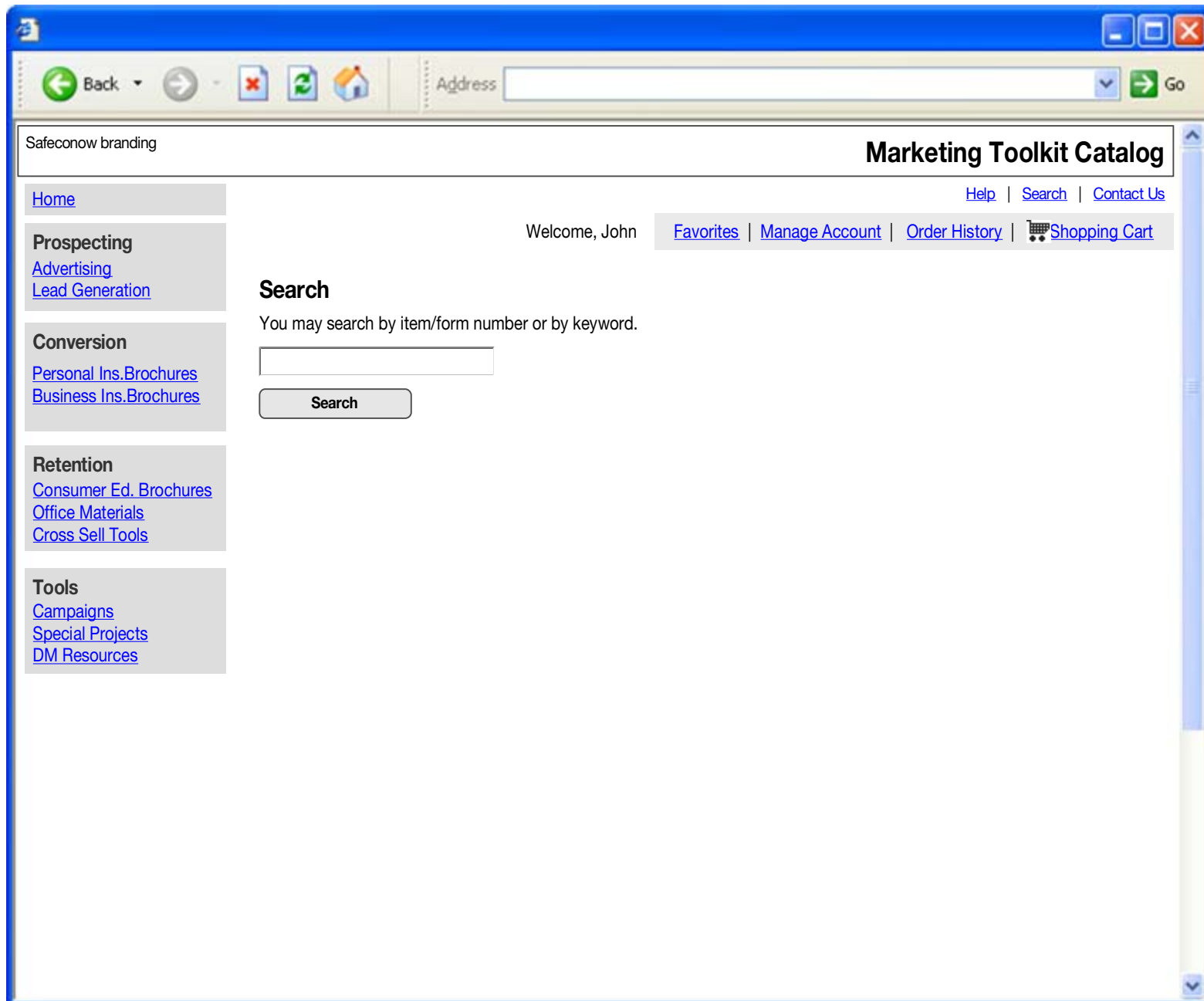
Actions
- enter search terms

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Revised: Sept. 17, 2004

Marketing Toolkit Catalog Schematics (version 8)

13.0 Search



COMMENTS

Goals

- streamline searching

Actions

- enter search terms

Functionality

Current site requires that user select whether to search on item number or keyword. Revised search will not include this choice (Search system should be smart, rather than forcing user to make decision).

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Revised: Sept. 17, 2004

Marketing Toolkit Catalog Schematics (version 8)



13.1 Search Results

Safeconow branding

Marketing Toolkit Catalog

Home [Help](#) | [Search](#) | [Contact Us](#)

Welcome, John [Favorites](#) | [Manage Account](#) | [Order History](#) | [Shopping Cart](#)

Search Results

Search Again

You may search by item/form number or by keyword.

- Product Thumbnail AP-732 **Accident Guide** *New*
Customizable PDF
[enlarge](#)
- Product Thumbnail AP-2450/S **Auto Insurance Brochure** *Updated*
(Spanish)
Customizable PDF
[enlarge](#)
- Product Thumbnail [form number] **[title]** *[New or Updated]*
([language])
For Agents Only
[item type]
[enlarge](#)
- Product Thumbnail [form number] **[title]** *[New or Updated]*
([language])
For Agents Only
[item type]
[enlarge](#)

Etc.

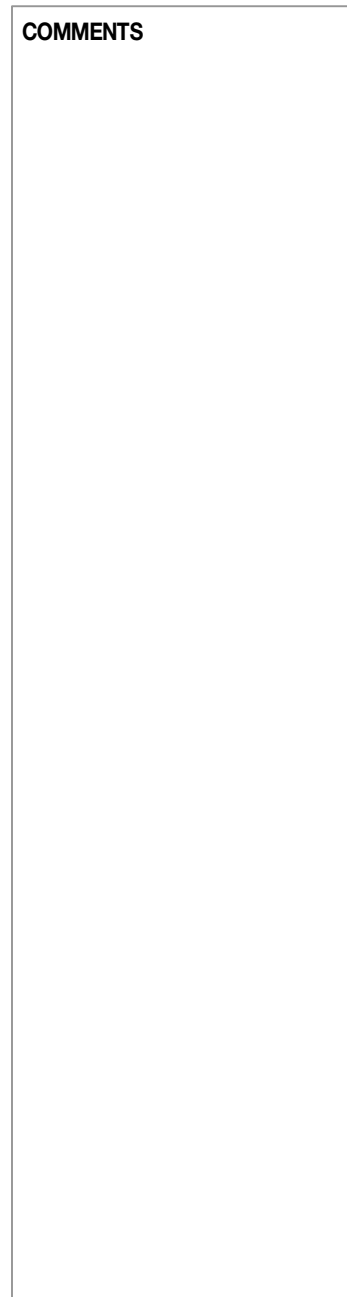
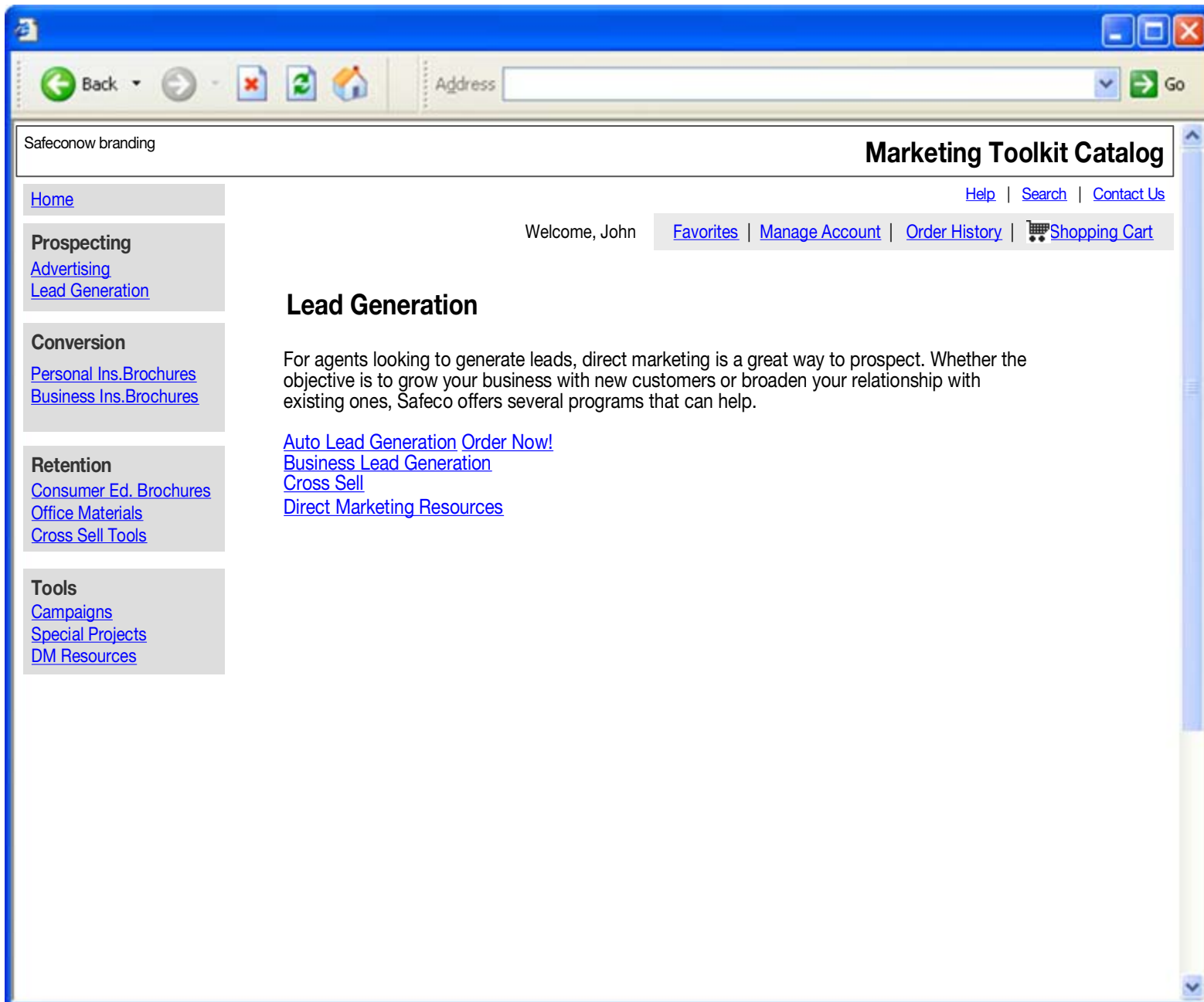
COMMENTS

Goals
- streamline searching

Actions
- enter search terms

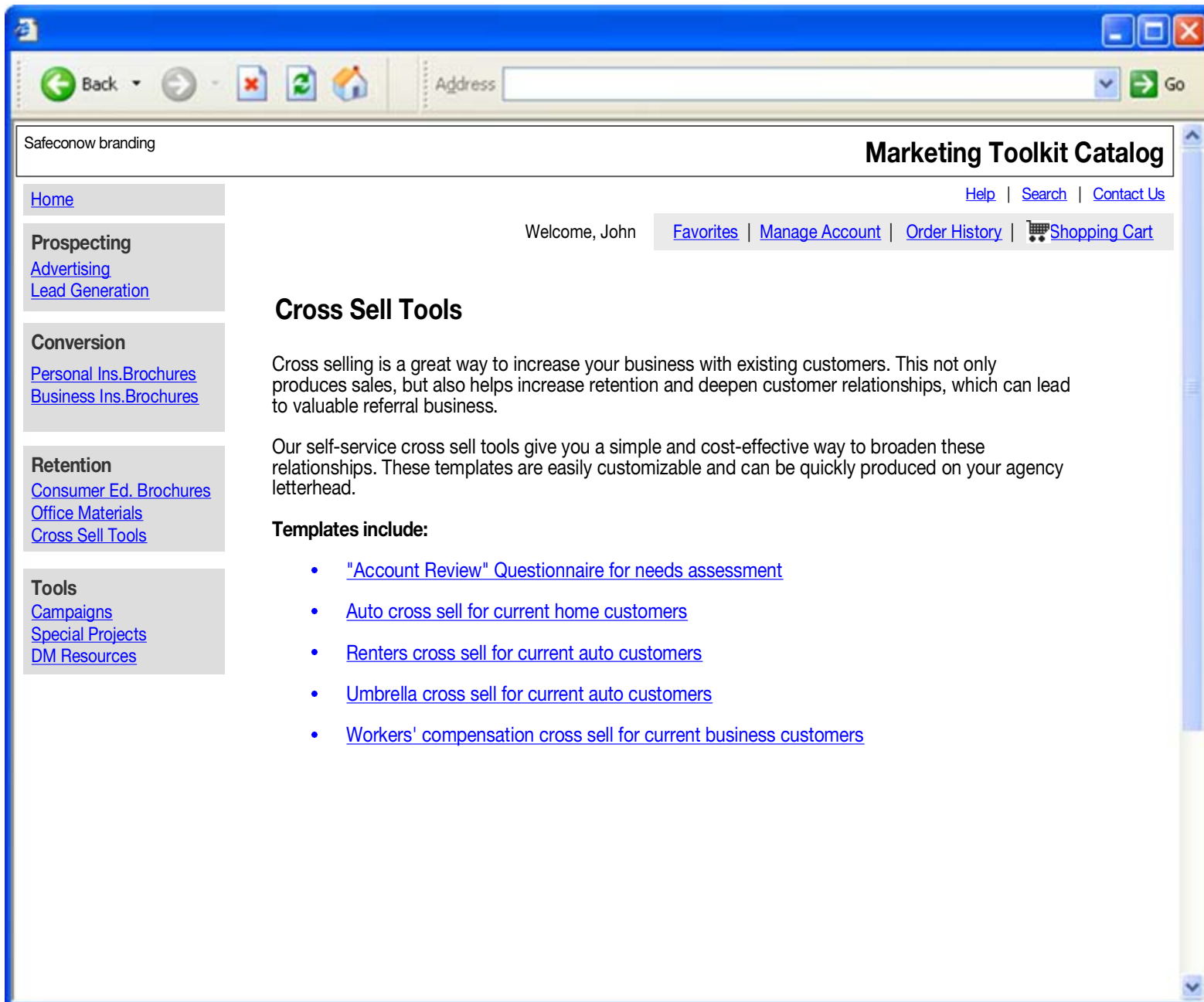
This document shows informational relationships only and does not represent final design or layout.

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Revised: Sept. 17, 2004



The screenshot shows a web browser window with the following elements:

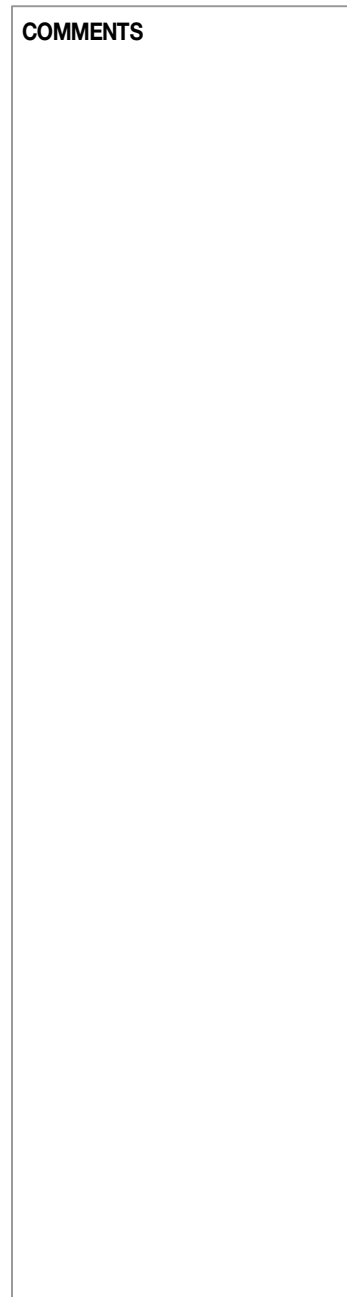
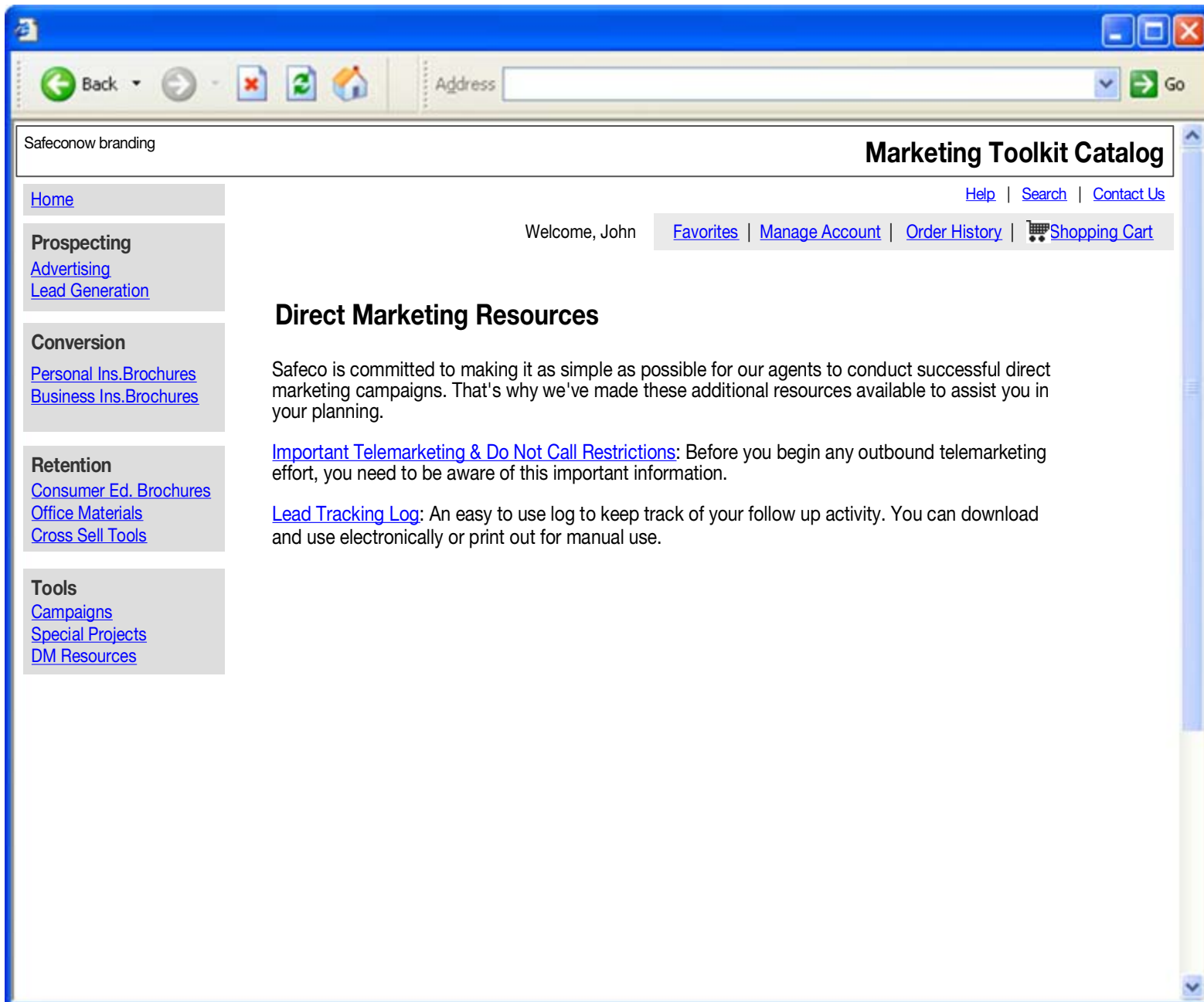
- Browser Address Bar:** Contains "Back", "Forward", "Home", and "Go" buttons. The address field is empty.
- Page Header:** "Safeconow branding" on the left and "Marketing Toolkit Catalog" on the right.
- Navigation Links:** "Home", "Help", "Search", "Contact Us", "Welcome, John", "Favorites", "Manage Account", "Order History", and "Shopping Cart".
- Left Sidebar:** A vertical menu with categories: "Prospecting" (Advertising, Lead Generation), "Conversion" (Personal Ins. Brochures, Business Ins. Brochures), "Retention" (Consumer Ed. Brochures, Office Materials, Cross Sell Tools), and "Tools" (Campaigns, Special Projects, DM Resources).
- Main Content Area:**
 - ## Cross Sell Tools
 - Cross selling is a great way to increase your business with existing customers. This not only produces sales, but also helps increase retention and deepen customer relationships, which can lead to valuable referral business.
 - Our self-service cross sell tools give you a simple and cost-effective way to broaden these relationships. These templates are easily customizable and can be quickly produced on your agency letterhead.
 - Templates include:**

 - ["Account Review" Questionnaire for needs assessment](#)
 - [Auto cross sell for current home customers](#)
 - [Renters cross sell for current auto customers](#)
 - [Umbrella cross sell for current auto customers](#)
 - [Workers' compensation cross sell for current business customers](#)

COMMENTS

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