



Expert Forum, Financial Services

Inaugural Meeting , New York

April 1-2, 2002

Agenda Speaker List Communication & Admin

Event Sponsor



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The Ultimate Goals of IIID

The establishment of a global network of information design experts and a semi-virtual Information Design University (IDU)

The Ultimate Goals of the Expert Forum, Financial Services

The ultimate goals of the forum will be forged by the members, within the following guidelines and tenets.

- Develop a Thematic Network of experts in financial information design within IIID
- Decide how experiences could be exchanged and competencies joined
- Nominate experts to potential clients who are in need of special services
- Partner for complex projects which require multiple competencies or larger resources
- Share research and resource materials
- Promote formal links with researchers and research institutions
- To gather a critical mass of evidence documenting the commercial impact of information design on financial services
- Contribute articles to the IIID newsletter, Information Design Journal and other journals
- Contribute expertise to the IIID Information Design University project
- Actively work with governments and institutions to promote better information design in financial services.

Event organisers

Wes Ervin - DST Output

Peter Simlinger - IIID

Ludwig Haskins - Financial Designs

Agenda - Monday, April 1, 2002

09:30-10:00	Arrival & Welcome	See page 17 for map and transport details. Each participant will receive a Forum kit upon arrival. Coffee and Tea will be available in the meeting room.
10:00-10:05	Forum Commences	Wes Ervin will open the meeting, review goals, explain scheduling and other ground rules.
10:05-10:15	IIID	Welcome from Peter Simlinger
10:15-10:25	DST Output	John Scileppi , General Manager Marketing Services Division of DST Output & Kim Herren , Executive Vice president of Marketing and Strategic Planning, DST Output.
10:25-10:45	Personal Introductions	Quick personal introductions from each participant
10:45-10:50	Presentations Commence	Ludwig Haskins will present the agenda.
10:50-11:10	Presentation	Giuseppe Attoma & Melanie Pain of Attoma Design, France
11:10-11:20	Presentation	Irene Wong , Australian Securities and Investments Commission.
11:20-11:50	Coffee Break	Time to check for messages and make phone calls.
11:50-12:20	Presentation	Skip Shelly & Werner Koepf of Maya Designs, USA
12:20-12:50	Presentation	Aaron Marcus , AMandA, USA
12:50-13:00	Q&A	Aaron Marcus , AMandA, USA
13:00-13:30	Guest Speaker	Mitchell Meisler , <i>Managing Director and Director of Strategic Planning at C.E. Unterberg Towbin</i>
13:30-14:50	Lunch	(See notes on page 17 for lunch arrangements)
14:50-15:00	Presentation	Andrew Boag , Boag Associates, UK
15:00-15:10	Presentation	Tokiko Tsumemaru , Sumitomo Life, Japan
15:10-15:20	Presentation	Christopher Liechty , Meyer & Liechty, USA
15:20-15:30	Presentation	David Somers , Trevezel Systems GmbH, Germany
15:30-15:40	Presentation	Marla Schay InForm Inc, USA
15:40-15:50	Short Break	Time to check for messages
15:50-16:00	Presentation	Norm Goldberg Agnew Moyer Smith, USA
16:00-16:30	IIID	Peter Simlinger reviews past activities and future goals of IIID & Wes Ervin presents a photo tour of past Vision Plus events
16:30-16:40	Presentation	Raoul Rickenberg Standard Deviation Studios, USA
16:40-17:00	Q&A	Opportunity for open forum Q&A with the day's presenters
17:00-18:00	Informal Social	Drinks at a nearby bar, individuals to make private arrange for dinner - an opportunity for natural affinity groups to dine together

Agenda - Tuesday, April 2, 2002

08:30-09:30	Morning Coffee	Time for pre-session discussions
09:30-10:15	Guest Speaker	Bob Bauer , Chief Technologist for the Global Services Division at Xerox and a former PARC scientist
10:15-10:20	Q&A	Bob Bauer
10:20-10:30	Presentation	Karen McGrane Razorfish, USA
10:30-10:40	Presentation	Alan Davis PricewaterhouseCoopers, Canada
10:40-10:50	Presentation	Matt DuBeau , Siegelgale, USA
10:50-11:00	Presentation	Robert Linsky , Art Plus Technology, USA
11:00-11:40	Coffee Break	Time to check for messages and make phone calls.
11:40-11:50	Presentation	Wes Ervin DST Output, USA
11:50-12:00	Presentation	Deborah Bosley UNCC, USA
12:00-12:10	Presentation	David Scharn , State Street, USA.
12:10-12:20	Presentation	Ludwig Haskins , Financial Designs, UK
12:20-12:30	Presentation	Doug Wright , DST Output, USA
12:30-12:40	Presentation	John Watkinson , Simplified Communications Group Inc., Canada
12:40-12:50	Presentation	JoAnn Lotfi , Tangible Designs, USA
12:50-13:20	Q&A	Opportunity for open forum Q&A with the day's presenters
13:20-14:40	Lunch	(See notes on page 17 for lunch arrangements)
14:40-15:20	Guest Speaker	Meg Ventrudo , Assistant Director of the Museum of Financial History, New York
15:20-16:10	Discussion	Goals and Membership
16:10-16:50	Brainstorming	Prioritised program of action for next 12 months.
16:50-17:20	Funding & Sponsorship	Pooling resources
17:20-17:25	Chairperson & volunteers	Selecting Expert Forum Chairperson
17:25-17:30	Closing remarks	Peter Simlinger

Participants in Alphabetical order

Giuseppe Attoma

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Presentation Abstract

Case Study: Banque de Luxembourg

Client's profile, positioning and context

Process diagram: building a unique information/
experience map

Application 1: diagram of cross relationships between
customer experience and corporate literature + financial
information documents

Application 2: applying user scenarios methodology
("story telling") for creating an interactive application
(to be used in commercial meetings between the bank
advisors and the client).

Biography

Giuseppe Attoma is founder and creative director of
Attoma, a leading information design studio.

Attoma was founded in Paris in 1997 to provide informa-
tion design services to corporate and institutional clients.

Giuseppe Attoma is a specialist in corporate identity,
information design and interface design for complex
financial, scientific and industrial projects.

Andrew Boag

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Presentation Abstract

Boag Associates has recently developed new invoice
designs for Royal Mail (the UK's postal business). We
are currently engaged on the design of residential and
business bills for a leading utility that centers around
convergent billing and how to ensure clarity of informa-
tion presentation in this context. We are also providing
consultancy around maximizing CRM opportunities
through billing. We are advising on how to present clear
financial bills and financial statements, whilst working
within the constraints of existing finance systems, and
customer databases, and whilst also ensuring that, by
'future proofing' our proposals, they allow for on-going
development of CRM through bills, and delivery via non-
paper channels.

As a result, Boag Associates are building knowledge in
the following areas: - usability at all levels in the relation-
ship between our clients and their customers - billing,
e-billing, EBPP, and its role in CRM - product and services
development for multiple and emerging channels - trans-
forming relationships with customers to ensure clients
retain customer loyalty - the importance of information
'ownerships' as financial documents increasingly become
marketing tools.

And in presenting in New York, Andrew will discuss: -
problems in usability: assessing user's needs, and nego-
tiating this through the business process - getting the
most out of a redesign when financial system and imple-
mentation budgets are constrained - maximizing the
potential of output technologies - assessing KPIs and
delivering value - the role of creativity in performance-
driven solutions.

Biography

Andrew Boag graduated with a first-class honours
degree in Typography & Graphic Communication from
the University of Reading in 1985.

From 1985 to 1990 he lectured in Typography at the
University of Reading, and consulted for clients like the
Inland Revenue, Yellow Pages, and the BBC. From 1990
to 1993 he was Special Projects Manager at Monotype
Typography Ltd. He developed new products; oversaw
the development of font CD-ROMs; managed anti-piracy
activities; edited publications and carried out research;
planned conferences; and ran Monotype's Education Ser-
vice.

In 1993 Andrew Boag set up his own consultancy with
the name Typographic Problem Solving in London N16.
In 2000 the practice changed its name to Boag Asso-
ciates, and moved into Smithfield (Central London).
Clients include Oxford University Press, Cambridge
University Press, English Heritage, Monotype, Linotype,
The Family Fund Trust, the Office for National Statistics,
Sotheby's, the Central Office of Information, and the
Qualifications and Curriculum Authority. Andrew lectures
on the MA Typo/graphic Studies course at the London
College of Printing. In April 1998 Andrew was awarded
a contract as typographic and information design con-
sultant to the Royal Mail. This contract was renewed
in 2001. Boag Associates are the sole UK agent for the
Enschedeé Font Foundry.

He has given papers at Monotype Conferences, at the
Information Design Conference, as visiting lecturer at
Nova Scotia College of Art & Design, at The University
of Michigan, and at Rochester Institute of Technology.
Andrew has written for Graphics World magazine, Print,
Designing, Image Reports, Typography Papers, edited an
issue of Typographic (the journal of the Society of Typo-
graphic Designers), and he edited the Bulletin of the
Printing Historical Society from 1994 to 1996. In 1999 he
was the UK judge for Linotype's international type design
competition, and he is currently external examiner for
the Master of Arts in Typeface Design at the University
of Reading.

Professional affiliations: Andrew Boag was a founding
committee member of the Information Design Associa-
tion (IDA). He was Publishing Manager of Information
Design Journal. He is also a member of the International

Institute for Information Design (IIID) and the Society of Typographic Designers (std).

He is a committee member of the Printing Historical Society (PHS), and is also a member of the American Printing History Association (APHA).

He is a Board member of the Association Typographique Internationale (ATypI), and was responsible for programme planning for their 1997 congress in Reading, England.

He is a member of the Double Crown Club – a club limited to 70 members – exclusive to those who have excelled in the fields of design or production in publishing. He is also a fellow of the Royal Society of Arts..

Deborah Bosley

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Presentation Abstract

Current readability and usability research can have a significant impact on financial writing strategies and document design. These research outcomes are valuable both for information designers and for financial institutions themselves as the former continually seeks to integrate visual and verbal information and as the latter increases its value through responding to consumer needs. Such well-researched design strategies could lead to increased consumer/customer loyalty for a financial institution that produces readable and usable financial information. Clear communication creates confident consumers.

Biography

Dr. Deborah S. Bosley is a technical writing consultant and readability expert specializing in document design and writing training for financial institutions and health agencies. For the past fifteen years, she has worked with such companies as The Privacy Council, TIAA-CREF, Wachovia Bank (First Union), Royal & Sun Alliance Insurance, Founders Federal Credit Union, Mecklenburg County Department of Social Services, North Carolina Foundation for the Advancement of Health, IBM, and Hoechst Celanese, among others.

She also is the Director of the University Writing Programs at UNC Charlotte. In December 2001, she appeared on a communication specialists' panel in Washington, D.C. at the interagency workshop: "Get Noticed: Effective Financial Privacy Notices." This workshop was sponsored by the Federal Trade Commission, the Securities and Exchange Commission, the Commodity Futures Trading Commission, and the Board of Governors of the Federal Reserve System, among others. Over 400 financial institutions attended this workshop to learn how to write these notices in plain language using proven document design strategies.

Her consulting working includes document design particularly in the area of privacy notices and other financial documentation. In addition, she develops and delivers writing training including proposal writing, procedures and instructions, on-line documentation, web content, user manuals, and financial and patient information. She specializes in issues related to document and information design, and readability including writing documents for lay audiences. She has received outstanding evaluations for her training workshops.

Bosley has published over two dozen articles on issues related to technical writing and communication. In 2001, Allyn & Bacon published her second book, *Global Contexts: Case Studies in International Technical Communication*. Currently, she is writing a series of books on aspects of business and technical writing.

Alan Davis

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Presentation Abstract

The presentation will discuss examples of graphs, primarily from annual reports, and speculate on why problems remain prevalent, what the continuing failure to use graphs effectively in this context means for the financial community (including investors). What the information design community can do to improve the situation will be an underlying theme.

Biography

Alan Davis is Director of Tax Communications for PricewaterhouseCoopers in Canada. He has more than 15 years' experience developing technical and marketing material aimed at professionals and their clients.

For over a decade he has pursued his interests in information design and clear business writing. Mr. Davis is co-author of a chapter on effective writing in a university business textbook, and has written many articles about graphs. He advised the U.S. Securities and Exchange Commission on its material on the use of graphs (part of the SEC's Plain English Handbook) and was an advisor to a study by the Canadian Institute of Chartered Accountants on graphs in financial reporting. He is a member of the editorial board of *Information Design Journal*.

Mr. Davis has made presentations about graphs to business, professional and academic groups in Canada, the U.S., the U.K. and Europe, and to students in a variety of disciplines at Wharton, the University of Toronto, the University of Western Ontario, Queen's University, the London School of Economics, the Ontario College of Art and Design, and the University of Amsterdam.

At the University of Toronto, Mr. Davis earned a degree in physics and philosophy and another in law. He also

holds an MBA from the Ivey School of Business (University of Western Ontario) and is a member of the Ontario Bar.

Matt DuBeau

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Presentation Abstract

Financial companies see privacy policy notifications as an unnecessary exercise, citing low "opt-out" rates. Consumer groups cite these same figures, claiming that the notices have been misleading and disingenuous, and calling for more stringent disclosure requirements.

The premise behind these responses, indeed behind the requirement itself, is that consumers equate all information sharing with privacy violation, and that the mere mention of personal information sharing casts an institution in a bad light. Lost in these machinations is the opportunity for financial services companies to treat the annual notice as more than strictly a regulatory exercise with no potential benefit.

Simplified design and writing principles are needed to foster a balanced approach to privacy policy disclosure that helps consumers understand the specific benefits as well as the risks of information sharing. As long as consumers continue to demand comprehensive financial solutions involving banking, investment and insurance, they may very well encourage firms they view as reputable and trustworthy to help them find additional resources that complement their plans. The result can improve an institution's brand image and expand its business by involving customers in the decisions not only about information sharing, but also about expanding their resources from within and without a single institution.

Biography

Matthew DuBeau heads the Simplification practice at Siegelgale, where he directs information design, content strategy, and business analysis to clarify, simplify, and streamline clients' functional communications.

Matt has more than ten years' experience developing simplified architecture and design for document programs, Web sites, Web-based applications, information flow processes, and content strategies for clients in a variety of industries, including financial services, telecommunications, retail consumer credit, mutual funds, insurance, data processing, payroll, manufacturing, banking, health care, utility, and government.

Some of his recent work includes a comprehensive online strategy for one of the world's largest commercial finance providers; a suite of Internet applications for SEI Investments that provides Web-based cash manage-

ment tools for corporate treasurers; a new approach to market segmentation and personalization for Edward Jones's brokerage statements; an innovative bill design for BellSouth's bundled services; new tax forms for the Internal Revenue Service that are easier to use and take advantage of advanced form-processing technologies; and customized paper and online forms and reports for Merck-Medco's pharmacy benefit plans that are easier to understand and less expensive to produce.

Matt has spoken at various seminars and symposia on design for on-demand document technology, typography for electronic display and high-speed laser printing, and the effective use of color in functional documents.

Prior to his work at Siegelgale, Matt designed electronic catalog templates for a large millwork distributor, marketing and enrollment material for a regional retirement plan provider, and he helped to redesign CG Magazine for Agfa-Compugraphic Division.

Matt earned an M.F.A. with honors in graphic design at the Rhode Island School of Design, where he presented his thesis on the metaphorical nature of visible language. He received a B.A. in English Literature from the University of Rochester

Wes Ervin

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Presentation Abstract

Personalization has become the holy grail of financial communications. The speaker will present his view of progress to date, illustrate a few breakthrough products, and candidly question assumptions in the marketplace. He will focus on the challenge of designing integrated, personalized communications for delivery across multiple media which are so vastly different. The speaker will suggest areas where research can be done by the IIID Expert Forum.

Biography

Wes Ervin is Chief Information Architect at DST Output (formerly Output Technology Solutions), a leader in providing integrated communications which enable clients to develop and maintain more personal, lasting, and profitable relationships with their customers. DST Output produces 1.4 billion communications a year in both print and electronic media.

Prior to joining DST Output in 2001, Wes was Managing Director of Information Design Associates for ten years. He started this company after working for ten years at several major Wall Street firms as a client communications specialist. His industry expertise ranges from institutional businesses such as corporate finance and securities research to retail brokerage and retirement products.

Wes has been active with the IIID for the last seven years, and his work has been published in the Vision-

Plus Monograph Series. He also formed the Information Design Association of North America in 1995.

Wes holds BA, MA, and PhD degrees from the University of Chicago in Asian Studies and Art History. He was Assistant Professor at the NYU Graduate Business School from 1985-90.

After hours he and his wife, Wendy, are semi-professional Ballroom and Latin dancers.

Norm Goldberg

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Presentation Abstract

Xplorion is the first permanent exhibit space dedicated to the exploration and understanding of a region. Located in a 3,300-square-foot storefront on the ground floor of a historic Pittsburgh skyscraper, the center is interactive and entirely digital. It opened in late February 2002.

Xplorion was designed from the ground up as an information environment. It draws many of its visitors with an innovative plasma-screen video display that addresses the street and provides an immediate visual impression of southwestern Pennsylvania. Visitors can then browse over 1,200 regional information resources using XplorionConnect, or visit XplorionQuest to take a guided flight throughout the region, flying to regional destinations of their choosing in real time.

Norm will present the Xplorion exhibit, with an emphasis on the use of XplorionQuest to deliver information in an entertaining, highly visual format.

Biography

Norm Goldberg is a graduate of Carnegie Mellon University, where he received a Bachelor of Fine Arts degree in Graphic Design and a minor in professional writing. He combines skills in two- and three-dimensional design with experience in information architecture. A common thread in Norm's work is complex information organized and presented so that it is entertaining and easy to understand.

Among his projects are an application guide for systems furniture, design standards for policy and procedure documents for corporations and universities, an interactive strategic plan for civic development, and an interactive web site about the Allegheny River Watershed. Norm has also developed programs of interpretive graphics for exhibits ranging from historic artifacts to zoo animals.

Most recently, Norm has focused on environmental graphic design, including wayfinding programs for convention centers, hospitals, and urban spaces.

These projects include the planning of sign messages, the design of custom architectural sign programs, and the development of data displays.

Norm's most recent project is Xplorion, is a digital information environment designed to inform and educate residents, visitors and investors about southwestern Pennsylvania. Norm participated in initial project development and led its implementation team. He developed a process framework that helped AMS structure and shape the information that Xplorion provides, and contributed to the conception and design of all of its exhibits.

Elizabeth Gooding

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Biography

Elizabeth founded Art Plus Technology (APT) in 1988, and has since dedicated herself to turning the company into a premiere provider of design and development services for the financial services industry. Her experience includes information and process design, technology assessment and recommendations (including printing and mailing technologies), electronic presentment, and outsourcing evaluations. She has published extensively and is frequently sought as a speaker at industry conferences on topics such as information and process design, brand identity, electronic presentment and emerging technologies. Elizabeth is well qualified to talk to any group about improving their business process, improving customer retention, and maximizing new opportunities for document design, print and Internet technology. A docu-pioneer, Elizabeth created the concept of The Virtual Document Factory and has presented it at conferences around the world such as TechnoForum Paris, MailCom, and Xplor.

Ludwig Haskins

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Presentation Abstract

Ludwig will present an overview of the forces (demographic, economic, social, legal and technological) shaping financial services over the next decade. How governments and corporations are responding to the new pressures and suggest where information design in conjunction with cutting edge technology can make a decisive difference.

The presentaion will examine some of the key areas where major changes are already evolving - compliance,

training, automation, aggregating benefits, interactive self service, pervasive mobile computing - all of which require the involvement of information architects and information designers.

As designers it is also important to look at some of the key software technologies that will drive these changes - in particular the future importance of expert systems and bug free software.

Biography

Ludwig graduated from the Slade School of Art, University College London, where he received a bachelor of Fine Art degree in Sculpture, History of Art and Visual Psychology.

He spent 13 years in financial services specialising in the sale of pensions and designing visual solutions for reporting, content communication and face-to-face meetings.

He then spent 5 years researching, writing and producing information graphics to support business to business communication in retail financial services.

Over the last 2 years he has done the research and concept development for two dot com startups in the financial services sector. One of which has raised £55M in venture capital and is now coming to market.

He has taught information design at The United Nations FAO headquarters in Rome and is authoring a book that charts global gender differences.

Werner Koepf

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Presentation Abstract

Designing Human Experiences with Information

The barriers to data creation and access have been lowered significantly allowing more people to gather, store, analyze, synthesize and create new information. Our current tools do not fully comprehend the human experience with information. So traders, portfolio managers, analysts and many other user types are less effective -- both as individuals and as members of group decision making.

To improve this problem MAYA is guided by the principles of information centricity and direct manipulation developed in our early work experiences designing advanced logistic systems for the Defense Advanced Research Projects Agency (DARPA). We will discuss how an interdisciplinary design approach is used to architect systems from more flexibly designed data, logically structuring it in pattern (or information architectures) and advanced rendering styles that meet user needs.

We will describe how advanced techniques for data visualization, collaboration (both synchronous and asynchronous), geo-spatial interfaces and other innovations

emerge from interdisciplinary design -- where engineers, human scientists and visual designers work together to deliver more satisfying human experiences with information.

Biography

As director of engineering at MAYA Viz, Werner Koepf's primary responsibilities are to lead, manage, streamline, and grow the company's software engineering group. In doing so, he's involved as a creative thinker, software architect, and technology adviser in most client projects. He also participates in the overall strategic leadership of the company.

Before joining MAYA Viz in 1999, Werner worked for Aspen Technology, a leading software and solutions provider for process industries. At Aspen, he spearheaded the inclusion of neural networks, genetic algorithms, fuzzy logic, PCA, PLS, and other statistical and artificial intelligence techniques into various process-modeling and simulation-software products. Werner has a Ph.D. in theoretical nuclear physics from the Technical University in Munich, Germany. Before leaving academia in 1997, he performed research on the microscopic quark structure of nucleons at various universities around the world.

Christopher Liechty

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Presentation Abstract

Global training for American Express Travelers Cheques.

American Express customers expect to be able to travel anywhere in the world and use their Travelers Cheques without much trouble. Ideally, banks and merchants everywhere would know what the Cheque products are, how to recognize counterfeits, and how to accept Cheques without hassle for the customer.

For the past seven years, Christopher Liechty of Meyer & Liechty, Inc. has worked to globalize and unify acceptance marketing and to find the most effective ways to educate financial institutions and merchants about recognizing and accepting American Express Travelers Cheques. This search involved the centralization of acceptance marketing efforts, the use of visual language, and an effort to elevate the level of design.

The results of this global approach are that the brand presentation has improved, training happens simultaneously worldwide, and the efficiencies of the centralized process have produced considerable cost savings.

Biography

Christopher Liechty (pronounced Lick'-tee) is president of Meyer & Liechty, a design firm specializing in cross-cultural design. Liechty began his career in 1991 at Word-Perfect Corporation, where he designed materials in more than 25 languages. Meyer & Liechty has produced

campaigns for more than 140 markets in 30 languages. Liechty is vice president of AIGA–Salt Lake City and holds a BFA in graphic design. He spent two years as a volunteer in Taiwan, where he became fluent in Mandarin Chinese. His interests include skiing, mountain biking, bookmaking, and American Sign Language.

Robert Linsky

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Presentation Abstract

Robert will address the creative complexities and commercial challenges faced by incorporating existing branding into streamlined statement design and production.

Biography

Robert joined Art Plus Technology (APT) as Senior Vice President, Design in 1997. Prior to joining APT, he was managing partner and senior designer for Clark/Linsky Design, Inc. based in Boston, Massachusetts. In the course of his 30-year career in design, Robert has garnered numerous awards for his graphic, information and document design work. He has taught graphic design at the New England School of Art and Design and was the chair of the design/advertising department and in 1995 was named to the Board of Trustees of the Massachusetts College of Art. In 1997, he became chair of the Administration and Finance Committee. He also helped found and is currently the executive director of the International Society of Graphic Designers, Ltd. Robert is often asked to speak at industry events on various design topics and has written industry briefs for publications such as Adcom, Document Processing Technology, Graphic Design USA, PRINT and Executive Edge. Robert attended Allegheny College and graduated from the Art Institute of Boston.

JoAnne Lotfi

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Presentation Abstract

Communication between project team members is crucial to the evolution of a successful product design. Projects within the financial services sector often have an even greater communications challenge because there are typically more stakeholders involved with varying roles and hierarchies, and they are sometimes spread across many geographic locations. It is the designers responsibility to facilitate the feedback loop of the team through usable design deliverables.

This presentation will brief the audience on effective and efficient methods of presenting visualizations of ideas, capturing feedback in a usable manner and iterating solutions for optimal design.

Biography

JoAnn Lotfi is a Principal at the San Francisco based design firm, tangible designs. She has been a professional design strategist and advocate for people-centered design for 10 years. Her unique methods of user research and collaborative rapid prototyping promote the emergence of useful, usable and satisfying interactive experiences across multiple mediums.

JoAnn's portfolio includes Charles Schwab, American Century, Currenex, Netscape, Miramax, and ESPN. She graduated from Penn State University with a degree in Integrative Art (graphic design, and Science, Technology & Society emphasis). She is a member of ACM Computer-Human Interaction, Society for Environmental Graphic Design, and the Usability Professionals' Association.

Aaron Marcus

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Presentation Abstract

Cross-Cultural Aspects of Financial Information Design/ Visualization

Anthropologists have identified cultural models and essential cultural dimensions for all world cultures, e.g., Hofstede's five dimensions of power distance, individualism/collectivism, masculinity/femininity, uncertainty avoidance, and long-term time orientation. How do these relate to essential tasks and artifacts of financial information design/visualization? For that matter, how do culture differences relate to the research in dimensions of persuasion, trust, intelligence, and cognition, and how might this affect financial information design/ visualization? AM+A has studied and published articles about Hofstede's theories adapting them to the Web. They will address the specific topic of financial information in this presentation.

Financial Information Design/Visualization for a Mobile Society

Mobile, wireless device user-interface design and human-experience design usually cover a wide variety of challenging input and display issues. What might be learned from advanced mobile device UI design in relation to financial information design/visualization? AM+A has developed more than 100 concepts of advance user-interface design for Samsung, Korea, and concepts for wrist-top devices. They will share some of their insights and explain possible impacts on the specific area of financial information

Because of the short time notice for this seminar, I am not sure of my travel schedule and other commitments yet. However, there are senior staff in my New York Office who are skilled presenters of these two kinds of presentations listed above. Depending on my/our travel schedules, there would be at least one person from AM+A present in New York City to give any presentations and to participate in all discussions.

Biography

With intelligent design of user-interfaces and information visualization, AM+A helps people make smarter decisions faster at work, at home, and on the way.

For 20 years, Aaron Marcus and Associates, Inc. (AM+A), has developed user-centered, task-oriented solutions for complex computer-based design and communication challenges for clients in all major platforms of client-server and Web PCs and NCs for office and home, information appliances, and mobile devices.

AM+A has served corporate, government, education, and consumer-oriented clients to meet their needs for usable products and services with proven improvements in readability, comprehension, and appeal. Working with either client R+D or marketing groups, AM+A uses its well-established methodology to help them plan, research, design, implement, train, and document metaphors, mental models, navigation, interaction and appearance. AM+A is/has been a recommended provider of service to EDS, HP, Motorola, NCR, Oracle, Peoplesoft, Sabare, US Federal Reserve Bank, Visa, and Xerox.

AM+A helped Xerox establish and was a founding member of its DesignNet program of qualified design service groups. AM+A has used the Internet since the company began, helped design the first version of America Online's user interface, and focuses now on cutting edge business-to-business Web start-ups and enterprise-wide application developers, as well as research projects for the Web, information-appliances, and mobile devices.

Clients are located in North America, Europe, the Middle East, and Southeast Asia. Current/recent clients include: Association for Computing Machinery, BioSciences, BMW (Germany), Getty Trust, Kanisa, Microsoft, Orbitz, Samsung (Korea), Tiscali (Italy), Tradiant, US Federal Reserve Bank, Visa, Wells Fargo Bank.

Past clients include: AC Nielsen, Adobe, American Express, Apple Computer, ArabiaOnline, Atari, AT&T, Autodesk, Bank of America, Barclays Group, Beckman Instruments, Charles Schwab, Cogito Learning Media, Columbia University Computer Science Department, Comergent, Comshare, Crowley Maritime, DuPont, Eastman Kodak, Elixir, Equitable Life Assurance, FedEx, Ford Foundation, Fujitsu, General Motors, Getty Trust, Healinx.com, Hell Graphics Systems, Hewlett-Packard, IBM, IQ Financial Software, JustSystem, Kaiser Permanente, Lawrence Berkeley Laboratory, Microcomputer Technology Consortium, MindAlliance.com, McGraw Hill School Systems, Motorola, National Institutes of Health, NCR, N2K, Oracle, Pacific Bell, Peoplesoft, Pivotal, Prodigy, Random House, Reuters, Resumix.com, Ricoh, Sabre, Samsung Korea, Scitex, Servador.com, Synergen, Softbank, The Learning Company, Travelocity, Unigraphics, Unisys, US Department of Energy, US Department of Defense, US West, Xerox, Zip2, 3Com, and 3M.

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Presentation Abstract

Strategies for Simplifying Retirement Planning

Americans today are responsible for managing their retirement savings, either through their tax-deferred 401k plan or through individual retirement accounts. But as the recent Enron scandal demonstrated, many Americans lack the investment expertise to manage their life savings. For many Americans, their 401k account is the only experience they have with investing. How can 401k providers educate participants about investing concepts, and make managing their retirement account easier?

In this talk, I'll present a case study of the development of a major new 401k site. I'll discuss several strategies we used to make financial concepts easier to understand, and ways we made the site easier to navigate.

Biography

Karen directs the Information Architecture discipline at Razorfish, defining the practice and overseeing the work of information architects across North America. She also leads the user-centered design process on client projects, constructing taxonomies and navigation systems, designing user interfaces, and conducting user research and usability tests. She has led a variety of client engagements at Razorfish, including projects for the Disney Internet Group, Encyclopedia Britannica, MCI WorldCom, Bank One, J.P. Morgan, Guardian Retirement, and Citibank.

Karen also conducts Website Assessment Workshops as part of Razorfish's proactive marketing efforts. In these informal discussions she provides a frank assessment of a client's current web presence, drawing on more than 200 analytical metrics she developed. She has delivered workshops to clients such as Bausch & Lomb, Clairol, Bed Bath and Beyond, West Marine, Prudential, Casual Male, Compaq, and The Federal Reserve Bank of New York.

Prior to joining Razorfish Karen pursued a Ph.D. in Technical Communication at Rensselaer Polytechnic Institute, focusing her research and studies on interface design and usability. She taught courses in HCI and usability via distance learning to IBM campuses across North America, and acted as the Assistant Director of Writing Programs in the Department of Language, Literature, and Communication. During her graduate studies Karen was employed by the Human Factors lab at Eastman Kodak, conducting user research and usability tests on a variety of Kodak hardware and software devices. Karen holds B.A. degrees in Philosophy and American Studies from the University of Minnesota, Twin Cities.

Mélanie Pain

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Presentation Abstract

Case Study: Banque de Luxembourg

Client's profile, positioning and context

Process diagram: building a unique information/
experience map

Application 1: diagram of cross relationships between
customer experience and corporate literature + financial
information documents

Application 2: applying user scenarios methodology
("story telling") for creating an interactive application
(to be used in commercial meetings between the bank
advisors and the client).

Biography

Mélanie Pain is account manager of Attoma. She is in charge of project management and communication for the studio major clients (Banque de Luxembourg, RATP, Ministère des transports). She is specialized in web site and interface design project.

Mélanie has a degree in Political Sciences from Institut d'Études Politiques and a postgraduate degree in Communication from Université de Marne-la-Vallée.

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Presentation Abstract

Reducing anxiety associated with online financial transactions: Rethinking the use of animated characters.

Animated characters are common in user interfaces. Generally, they are seen as a low-cost means of introducing novice or "techno-phobic" users to new software. This presentation focuses on research that calls into question the value of using animated characters. The effects of different characters on user anxiety, task performance, and the subjective evaluations of two commerce websites—one of which is a widely used financial services site—were tested in an experiment in which users were divided into two groups: those who were confident that they were in control of the web-based interaction and those who lacked such confidence. Results showed that the presence of an animated character on a website is similar to that of a real person in the room; users felt more anxious in the presence of animated characters and this effect was strongest for

those who felt least in control of their interaction with the software. The study also showed that characters decrease task performance under some conditions but, interestingly, increase trust in website content. The results of this study are discussed in terms of design considerations that maximize the positive influence of animated agents.

Biography

Raoul has been helping clients understand how they can use different electronic media to meet their objectives for over a decade. His ability to tailor mediated experiences in ways that align user expectations with client objectives rests on an unusual combination of skills. In addition to years of experience as an information architect and interface designer, Raoul has a background in academic research—he holds a Stanford Ph.D. in Communication—that enables him to uncover what, specifically, the people for whom he is designing desire from their mediated experiences.

Before founding standard deviation studios, Raoul was the Director of Experience Design at Atomic Tangerine. Prior to that, he was Creative Director at vivid studios, where he developed a practice area that focused on the integration of research and design. He has also taught courses on human-computer interaction and communication at Stanford University, where he has an ongoing program of research that focuses on people's reactions to different types of communication technology. Articles on this research have been published in leading academic journals.

Raoul holds a Ph.D. in Communication and an MA in Media Studies from Stanford University. He also earned a BFA in Sculpture from the Rhode Island School of Design

David Scharn

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Presentation Abstract

User-Centered Guidelines for Interface Design in the Financial Services Industry

This talk addresses the need in our industry for easy-to-use interface design guidelines based on an understanding of how humans perceive and process information. Generally, these guidelines would focus on areas of software development that would yield the greatest return for usability. One objective would be to create a more informed developer community and a more informed design community. The guidelines would also focus on four common usability problems: inconsistency, language issues, feature creep, and poor requirements gathering. Ultimately, adhering to user-centered guidelines extends the user's capabilities by freeing up mental resources for other tasks. Making software usable also extends markets for technology-based financial products.

Biography

Shortly after earning a Certificate in Software Technical Writing in the late '80s, David was hired as the technical writer at Mosaic Software in Cambridge, Massachusetts, which developed spreadsheets and other business software packages. When Mosaic folded after losing the Lotus copyright suit, he took a position as tech writer at Hanscom Air Force Base in Lexington. David left Hanscom to pursue graduate studies in English at the University of Texas at Austin, where he taught for several years in the Computer Writing and Research Lab (CWRL). Later, as the technical writer at iMark.com, an auction site for used industrial equipment, he was introduced to human-computer interaction (HCI) and user-centered design. Currently, as a manager in Product Documentation Services at State Street Corporation, he's striving to establish a user-centered design function in the company's software development process. Meanwhile, he's enrolled in the Master of Science program in Human Factors and Information Design at the McCallum Graduate School of Business, Bentley College

Marla Schay

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Presentation Abstract

Information Derivatives as a Means of Strengthening Financial Service Relationships

Financial services have benefited enormously from the ever growing spread and adoption of information technology. Creative and practical application of these technologies and their underlying infrastructure have been instrumental in creating a major revolution in the way customer service, reporting and transaction tasks are facilitated. Today's financial service experience is profoundly different than that of even 12 months ago. It is an experience that will continue to be enriched in the months and years ahead. One of the most significant trends fueling the enrichment process is the use of derivative information tools to provide more actionable, timely, and customer-specific recommendations. Adoption of derivative information tools and strategies will enable financial service providers to develop a depth of experience that will reach far beyond what is possible in print-based customer relationships today. Emerging derivative information technologies are likely to act as both an asset and a liability to traditional financial service relationships. InForm's Marla Schay will discuss these emerging trends as well as their potential relevance and impact on the nature of financial services in the future.

Biography

Marla Schay is Executive Vice President of InForm, where she heads the Customer Interface group's work exploiting new interfaces and channels to maximize consumers'

physical, cognitive and economic access to our clients' products, services and ideas.

She currently serves as Program Director for Marla directs numerous marketing, customer and shareholder communications programs, product support systems and other information-intensive projects. She focuses on developing user-oriented systems to reach both casual and expert intended audiences., whether they are casual users or sophisticated professionals

Ms. Schay's work has been recognized by leading industry and design organizations as well as industry groups in the areas of financial annual reports, shareholder communications and on-demand printing. She has participated in numerous Dalbar events and as an active member of Dalbar's Advisory Board for Communications in Financial Services.

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Presentation Abstract

Designing Human Experiences with Information

The barriers to data creation and access have been lowered significantly allowing more people to gather, store, analyze, synthesize and create new information. Our current tools do not fully comprehend the human experience with information. So traders, portfolio managers, analysts and many other user types are less effective -- both as individuals and as members of group decision making.

To improve this problem MAYA is guided by the principles of information centrality and direct manipulation developed in our early work experiences designing advanced logistic systems for the Defense Advanced Research Projects Agency (DARPA). We will discuss how an interdisciplinary design approach is used to architect systems from more flexibly designed data, logically structuring it in pattern (or information architectures) and advanced rendering styles that meet user needs.

We will describe how advanced techniques for data visualization, collaboration (both synchronous and asynchronous), geo-spatial interfaces and other innovations emerge from interdisciplinary design -- where engineers, human scientists and visual designers work together to deliver more satisfying human experiences with information.

Biography

Skip Shelly's accomplishments range from designing traditional printed artifacts to creating collaborative environments that foster rich and innovative design solutions. As a senior information designer at MAYA, he

has galvanized interdisciplinary product-design teams to create high value for both clients and end users.

As a design strategist, Skip has guided both global companies and technology-driven start-ups to develop information solutions that simultaneously deliver value to the business and provide world class user experiences. He brings clarity to the visual presentation of information in user interfaces and explores new ways to create more meaningful brand experiences through careful consideration of the actual use experience. He has worked with clients in global finance, energy, software, treasury management, defense, civic computing, business intelligence, education, and consumer products.

Skip joined MAYA after 10 years as an art director and designer at the Software Engineering Institute (SEI) at Carnegie Mellon University. He holds a B.F.A. degree from the School of Design at Carnegie Mellon University. He was the technology chair of the American Institute for Graphic Arts (AIGA)-Pittsburgh, lectures at University California at Berkeley, and is a member of the Advance for Design.

Peter Simlinger

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Biography

Peter Simlinger runs an information design business in Wien/Vienna, Austria which specializes in orientation systems and corporate design projects. Clients: OeBB (Federal Austrian Railways), Vienna International Airport, City of Vienna, Bank Austria. Among Peter's special projects were the compilation of an exhibition of ingenious Austrian design (1996) for the Federal Ministry of Economics and the design of a four year post-secondary study course in information design for FH Joanneum, Graz, Austria (2001/02 in its third year).

Work done for the OeBB was honoured by a "Brunel Award for Outstanding Visual Design in Public Railway Transportation 1987".

The fact, that Vienna International Airport repeatedly gets top ratings in the "Finding your way" category may be attributed to the signage system designed by Peter Simlinger.

Bank Austria, Austria's largest bank, has continued commissioning Peter from as early as 1970. Last year Bank Austria merged with the Bavarian Hypo Vereinsbank (HVB) to become part of one of the major European players in the banking business. Bank Austria is in charge of all HBV's East European subsidiaries. On national level Bank Austria took over Creditanstalt, thus strengthening its position even further.

Peter Simlinger was President of Design Austria, the professional association of graphic designers, product designers and illustrators from 1984 to 1992. He served

as a Chairman of the Austrian Standards Institute committee for Graphic Public Information from 1975 to 1989. During his chairmanship major Austrian and ISO standards governing the design, testing and application of public information symbols have been developed. At that time Peter realized the need to tackle complex design tasks by interdisciplinary and international co-operation. Based on the results of two studies, commissioned by the Federal Ministry of Science and Research and UNESCO he initiated the foundation of the International Institute for Information Design (IIID) in 1988. Since then he serves the Institute as a (honorary) director.

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Presentation Abstract

How To Produce Portfolio Reports for Private Banking Clients

Private Banks manage portfolios containing assets belonging to high-net worth individuals and institutional investors. Each individual portfolio generally has a net asset value in the millions and tens of millions of dollars. The net asset value of an institutional portfolio is in the hundreds of millions of dollars and higher. At the end of every year, and to a lesser extent every quarter, these Private Banks need to produce a report for each of the portfolios that they manage. These portfolio reports are given to their clients to show details such as the positions of the assets under management, the evolution of the portfolio value/risk over the preceding months/years, various statistics, and market commentary. However, producing such reports is a slow and cumbersome process. This paper summarizes the processes and tools in current use, and looks into the near future to see how banks are responding to the demands of their clients to produce more detailed (and better looking!) reports.

Biography

Born and raised in London, England, David Somers was quite happily programming the first generation of home and personal computers, when he stumbled into writing about them. Whilst working for a small computer magazine publisher, David was asked to help assist with the physical paste-up... he has never been the same after that first introduction to Spray Mount!

David is an unusual combination of being a programmer, technical writer, information designer, and typographer. David co-founded Trevezel Systems (www.trevezel.com), to develop reporting and publishing solutions for the private banking industry.

David is currently resident in Luxembourg.

Tokiko Tsumemaru

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Presentation Abstract

Japanese financial sector is changing gradually (called Japan's Big Bang). Until then the Japanese financial sector was a convoy protected and led by the government. As a result of having been "mothered" by the government for so long, financial organizations were like spoiled children. The Big Bang changed everything, though. Now the children would have to take care of themselves in this tough time of global competition. Individuals are also expected to assume responsibility for their own acts, including their asset management. People must now decide for themselves which financial organizations are safe and reliable and how to manage their money for their future, dreams and life after retirement. A new era has begun, but further structural reforms are needed.

I would like to overview quickly the financial services industry in Japan, including its strengths and weakness, with a particular focus on the asset management business (including the defined contribution and defined benefit plan markets). I would also like to discuss opportunities for Information Design, introducing an example - the creative group at Sumitomo Life Investment, a new asset management company in Japan.

Biography

relationship with Information Design

1999, met vision plus 7 in Tokyo, realized the word Information Design.

2000, went to vision plus 8 in Vienna, deeply interested in IID

2001, joined a publishing project 'Information Design' book as a translator

job experience

- graphic designer

tee graphics (editorial and book design office) in Tokyo

- 1999 - DTP team

Sumitomo Life Investment Co., Ltd. (Investment Management), Tokyo, Japan

- 2000 - chief, creative group

Sumitomo Life Investment Co., Ltd. (Investment Management), Tokyo, Japan

educational background

Bachelor of Arts with a degree in the Department of Art Science at Tama Art University

(Western art history, Museology)

John Watkinson

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Presentation Abstract

The financial services industry has learned how to communicate better with its customers. Some people get banking and investment statements they can understand. And thanks to securities regulators, at least in Canada and the United States, simplified prospectuses for mutual funds are no longer incomprehensible.

But this is only the minute tip of a gigantic iceberg of financial information that may meet disclosure requirements but fails by any measure to communicate effectively.

Plain language alone won't solve the problem. The financial services industry must also learn and adopt the techniques of information design. This is the only way SEC Chairman Harvey Pitt is likely to achieve his goal of financial reports that "nonexperts can read, digest and understand."

Biography

John Watkinson is the chairman and co-owner of Simplified Communications Group Inc., the Toronto-based company he founded in 1992.

Simplified Communications Group specializes in making printed and electronic business documents easy to use and understand. At the same time, it makes sure they reflect the brand image of its clients, support marketing goals, and meet systems, operating and compliance requirements. The company's work has been recognized in Canada and the United States as setting new standards of clarity in business communication.

John has worked in communications since 1963. He was Vice President, Communications at the Insurance Bureau of Canada and held senior communications positions with TransCanada PipeLines, Shell Canada and The Cabinet Office of the Government of Ontario. He also worked as a communications consultant in Toronto, Montreal, New York and London, England.

Terrence Westmacott

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Presentation Abstract

Terrence may present on behalf of InForm Inc. in the event that Marla Schay is unable to attend.

Biography

Terrence was the director of Project Ascend, one of the largest studies of the impact of change on wealth and financial services world-wide. He has held positions as: President and CEO of Retail Optimization International; General Manager and Chief Design Scientist of Center for Advanced Research in Design; Assistant Socio-Economic Planner for the City of Minneapolis; Assistant Curator of Design at Walker Art Center; Member of the judges panel for the American Product Excellence (APEX) awards program; and Member of the Advisory Board of the Management Roundtable.

He co-founded InForm, Inc. in 1990 to help decision-makers look beyond the basic operations implications of information technology and focus instead on its ability to create new industries, markets, competitors and consumer expectations and relationships.

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Presentation Abstract

"FIDO's tale: We knew many Australians were tempted by the golden promises of overseas cold callers as well as local swindlers. We also knew many Australians wanted independent and accurate information to help them through the financial maze of financial planning, shares, managed funds, superannuation and insurance. Not only that, since 1998 the Commonwealth Parliament expected the Australian Securities & Investments Commission 'to promote confident and informed participation by investors and consumers in the financial system'.

But we were best known to consumers and investors as the corporate watchdog, a regulator and enforcer of laws. And we had no Australia wide shop fronts where we could talk with people and give them warnings and advice.

Our challenge was to become known as an independent source of financial tips and safety checks.

The internet offered our best chance of distributing and updating investor and consumer information. We launched a special website for consumers and investors in March 2000. The website is called FIDO, that is Financial Information Delivered Online.

I'll outline our audience, our priorities, our strategies and how we're implementing them. I also look forward to telling you about our successes."

Biography

I've worked here about 10 years and previously I was an editor/ writer in occupational health and safety.

I also worked for our national statistical organisation for many years and have written articles on writing and editing tables.

I was on the executive of our state technical communicators' society for about 4 years and produced their monthly magazine. I spoke last year at their conference "A day in the life of an internet manager" and once before on converting hard copy to CD-ROM.

I've been involved with a number of communication projects here. I particular working with Robert Eagleson to develop a structural template for our policy statements for professionals in the legal and financial services area.

I developed a course for staff on replying to clients letters. I'm heavily involved with the redesign of our intranet here at work.

I've been internet manager for 2 years. We have 2 website <http://www.asic.gov.au> and <http://fido.asic.gov.au>. There's lots of things I've done on them but even more things that I'm itching to redo. One of my hopes from the start in this job was to write well for the web. We have a very big interest in writing for consumers, one of our websites is devoted to them. We have a Consumer Education Strategy

I run an informal group "Legal and Financial Communicators' Network". We meet once a month here where I work. On my list I have about 130 people working in the leading banks and law firms (also freelancers and commercial publishing house, CCH etc) here in the middle of Sydney. About 20 -30 people attend each meeting.

Doug Wright

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Presentation Abstract

Paper vs. Electronic Information Presentation: The case for both

Biography

For the past 12 years I have served as the Director of Information Design for what is now DST Output. Virtually all of my design has been for financial services companies (mutual funds, brokerage, retirement planning, insurance, etc.) Currently, my design team is responsible for four of the top five ranked statements in the mutual fund industry, and a total of 15 of the top 35 in mutual funds.

My expertise continues to be exploring new ways to help financial companies connect effectively with their customers in simplified ways. While clean design is the umbrella for this work, we also interact on a daily basis with the entire chain of delivery from programmers to postal regulators.

IIID Expert Forum Financial Services

DST Output
9th Floor
100 Wall Street
New York
April 1-2, 2002

DIRECTIONS

The fastest and easiest way to reach 100 Wall Street is by subway. (Taxis will take forever in the traffic.) You have two choices, depending on whether you are coming from the EAST side of Manhattan or the WEST side of Manhattan:

EAST side: Use the Lexington Avenue (East Side IRT) line. Take the number 4 or 5 train (Express) Downtown. Get off at the Wall Street stop. When you come up the stairs you will be on Broadway. Wall Street begins opposite the historic Trinity Church. Walk down Wall Street (you will pass the NY Stock Exchange and a number of historic buildings along the way). Keep walking down Wall Street until you come to Water Street (about 5 minutes). Cross Water Street. 100 Wall is on your left.

WEST side: Use the Seventh Avenue (West Side IRT) line. Take the number 1 or 2 train Downtown. Get off at the Wall Street stop. Walk on the platform towards the front of the train and use those stairs to come up. When you come up you will be on Wall Street. Walk downhill, towards the water. The first traffic light is Water Street (about 1-2 minutes away). Cross Water. 100 Wall is immediately on your left.

You will be stopped by security in the building lobby. We will give them a list of the names of all participants. Take the elevator to the 9th floor.

Subway maps (in multiple languages) will be available in the conference room.

PHONE CONTACT / MESSAGE CENTER

The main number at the DST Output office at 100 Wall Street is 212-344-5030. You may give out this number as the way to receive messages while you are participating in the meetings. The receptionist will take messages and hold them for you at the reception desk.

Please note that our cell phone policy is for all phones to be turned off or put on silent at all times while in the conference room. As a courtesy to participants, we are asking everyone to make their calls outside of the conference room (in the reception area or preferably outside while on break).

PRESENTATIONS

We will be using a tabletop projection unit (a Sharp XG-NV5XU) video projector with the standard computer interface cable. There is also a wall-mounted whiteboard if you want to draw.

LITERATURE DISPLAY

Feel free to bring your company or institution literature. There is a long counter for display.

COFFEE / REFRESHMENTS

We will have fresh coffee, tea, herbal teas, and water in the conference room on both days. We will simply divide the cost by the participants and ask you to reimburse us for the refreshments.

MEALS

There will be a lunch break on each day so participants may go out and get food of their own choosing. We will have a list of sandwich shops, salad bars, and restaurants in the near-by vicinity which serve a variety of take-away food, including salads, vegetarian, Halal and Kosher food.

We are planning to adjourn after the first day's session to a local pub for drinks and chat. This is purely voluntary. Everyone will be on their own for dinner. We will have a Zagats Guide and a Time Out in the conference room for you to browse.

ATTIRE

Corporate casual is fine.



A detailed and up-to-date map of public transport South of Canal Street is available from the New York Metropolitan Transportation Authority web site at...
<http://www.mta.nyc.ny.us/nyct/maps/mapdown.pdf>

