BOSTON LOGIC

WEBSITE DESIGN & CONFIGURATION

WELCOME TO BOSTON LOGIC!

We are excited to welcome you to the Boston Logic team and to kick off the design of your website.

About This Guide

We developed this guide to give insight into the overall process and individual steps that are necessary in order to roll out your new website. It will help set a clear vision for each of the deliverables, key milestones, and roles and responsibilities throughout the process.

BOSTONLOGIC
Technology Partners, Inc

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WELCOME TO BOSTON LOGIC

Thank you for choosing the Boston Logic Platform to grow your real estate business, manage leads, create a standout online brand, and close more deals.

Since 2004, we have been designing and launching websites and online sales and marketing solutions for real estate organizations looking to excel as technology leaders. We are committed to continuously improving our software and exceeding your standards and expectations as a valued partner. Once you have launched, our goal is for you to enjoy the following:

- A beautiful and functional website that will meet your goals and objectives, attract and impress site visitors, and deliver a high return on your investment.
- A back end that serves as the command center for your business, allowing you and your team to manage contacts and convert leads, simplify email marketing, integrate MLS Search, send hyper-local content, and drive more repeat and referral business through the power of automation.

Implementation of a new system can be challenging. Our Support and Deployment Teams are here to answer any questions and guide you through the process every step of the way. No question is too big or too small! Welcome to the Boston Logic family!

Roles and Responsibilities

We consider you a strategic business partner. We will work as a team to reap the benefits of our combined experience and efforts to roll out your new website. Outlined below are the expected responsibilities of each party.

Boston Logic Responsibilities

- Delivering the full scope of your agreed-upon Boston Logic project
- Guiding the process of configuring the Boston Logic platform
- Facilitating knowledge transfer and skill development
- Providing detailed project schedules and updates

Boston Logic Responsibilities (Cont.)

- Setting up weekly project status and progress reports including task progress, issue identification/resolution, and information gathering.
- Offering 3rd-party integration support as needed.
- Providing QA testing on your website.

Customer Responsibilities

- Indicating to Boston Logic who the dedicated Executive Sponsor, Project Manager, and System Administrator are assigned to the rollout.
- Providing input relating to the goals of the rollout.
- Providing feedback on projected schedule, designs, configuration, and test sites per the agreed upon project.
- Attending all necessary Boston Logic training.
- Creating and adding all site content (unless contracted otherwise).
- Providing all product and technical specifications, existing branding elements and assets, partnership details, and current business logic that relates to the Boston Logic Platform, as well as codes (e.g., MLS IDs), source files, and other pertinent documents.
- Working on the final configuration of the system so that it serves your brokerage's needs and business objectives.
- Importing all data using the functions of the Boston Logic platform.
- Serving in the leadership and management roles as the focal point for interactions with your other vendors (i.e., applications, integrations, MLS data) as required to complete your project.

PHASE I: PROJECT KICKOFF

The purpose of the **kickoff meeting** is to formally notify all team members, clients, and stakeholders that the project has begun and to make sure everyone has a common understanding of project scope, roles, and responsibilities.

Members of the Boston Logic team will be present to ensure a seamless project start for your Boston Logic engagement. From your team, plan to have all key stakeholders attend. This includes the project sponsor, project manager, system administrator, and key deliverable reviewers.

KICKOFF MEETING

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Kickoff Meeting (Cont.)

Meeting agenda will include:

- Project scope and goals.
- Project dependencies and known areas of risk.
- Key stakeholders and their roles/responsibilities.
- Project milestones and rollout process.
- Website design and implementation processes, including communication and change control procedures.
- Outstanding questions and next steps.

After the kickoff meeting, we will schedule weekly status meetings, and move forward with your website design and implementation.

PHASE II: SITE STRUCTURE

Site Architecture

The site architecture indicates what links to where, what pages are connected, and how the user navigates from one part of the site to another. Boston Logic will provide a document of Site Architecture Best Practices for your reference. During this phase of the project, we'll look to you to confirm the following:

- Feedback on your existing navigation..
- Examples of navigation that you find more ideal.

The goal for the this phase of the project is to freeze the main and footer navigation during the rollout process. You may, of course, make any changes post-launch.

When planning the site architecture, it is important to consider:

- **User Experience (UX)** Websites are meant to help you meet your business goals. The site should provide a user experience that is intuitive, logical, and effective.

- **Search Engine Optimization and Conversion** Goals Organizing the website pages logically helps the site perform better in search results. By considering conversion goals for a user (e.g., contact, download, sign up, CTAs), we plan paths for website visitors.

- **Online Branding** Boston Logic uses your brand identity to organize the website.

When reviewing the final site architecture with the client, Boston Logic will ensure the following:

- The navigation is complete.
- All content pages are accounted for.
- The relationship between pages is correct.

PHASE III: DESIGN & SITE CREATION

Design Overview

The Design phase focuses on your website's aesthetic look and feel. The design process will follow the package description as noted in the SOW and below. Boston Logic follows an iterative design process beginning with the homepage design.

During the initial homepage review, we will focus on how we believe the user will react to the design, whether the design meets the project business objectives and branding requirements including typography, and whether the layout reflects the desired interface.

Boston Logic's Design Packages

Scope specifications are outlined in the project's SOW. However, general package outlines are detailed below:

MODIFIED DESIGN PACKAGE

- **Personalized Homepage** If you have selected this package, you will pick a standard design that is then modified to be more personalized (colors, font style, navigation style, homepage layout, and footer).
- Interior page, agent theme, and mobile view page layouts are recommended by Boston Logic and will follow the global approved elements of the homepage. Additional changes to these pages may impact cost and schedule.
- Deliverable acceptance process and terms will be outlined in the project's SOW.
- All personalizations must be outlined in the SOW.

PREMIUM DESIGN PACKAGE

- **Personalized Homepage** If you have selected this package, you will receive three homepage design concepts based on the provided design direction that complies with existing Boston Logic platform requirements. One selected concept is modified for colors, font style, navigation style, homepage layout, and footer.
- **Internal Pages** Boston Logic will modify up to six standard internal page layouts designed using global elements from the approved website homepage. You then may select any of the following additional pages to be designed: Search, Search Results, Listing Details, Agents, Agent Details, Offices, Office Details, Area Profiles, Development Profiles.
- You will receive one mobile homepage layout and two agent homepage layouts using global elements from the approved website homepage.
- Deliverable acceptance process and terms will be outlined in the project's SOW.
- All personalizations need to be outlined in the SOW.

For both Modified and Premium packages, design comps (homepage or internal) should be reviewed for the following:

How do you believe your users will react to the design?
Does the design meet your business objectives?
Are typography, images, and image placement correct?
Are CTAs properly placed?
Are the requested content features and integrations designed?
Are all of the changes previously requested by you reflected in this revision?

PHASE IV: CONTENT CREATION

Following the creation of the staging environment and the end of the homepage design process, your dedicated Project Manager will share credentials with you and give you a tour of the administrative interface. This environment will later have your new theme applied and you can begin entering site content immediately.

Unless otherwise noted in the SOW, you are responsible for creating and adding all content to the site.

Basic Content and SEO Best Practices

Here are a few SEO best practices. For a more detailed list, please contact your dedicated Project Manager:

- One H1 per page (page headers are H1 titles).
- Add alt image tags for images.
- No tables! They are not responsive.
- Meta Data. Google does not look at keywords, but other search engines like Bing and Yahoo do.

Back End Content

There are a few levels of access in the administrative interface:

Broker: Has access to everything.

Agent: Has access to leads and email marketing (If they have been given a lead management seat). If they have their own site, they will have access to everything on their site, but will be limited on the broker's site.

Admin: Has access to everything (but cannot be assigned Leads).

Employee: Has access to Tasks, Events, Deals, Marketing.

Office Manager: Can be any of the above account types, but allows access to their Office's Leads.

Website Build

The web build phase is where a design becomes a website. Through front-end development, including HTML, CSS, and Javascript, the Boston Logic Professional Services Team will turn your accepted designs into an interactive user experience. This is the phase where higher level functionality gets added to the site including the configuration of the features and/or integrations that are supported within the Documentation.

Client Knowledge Transfer

Boston Logic believes that training in the form of a direct knowledge transfer regarding your website structure and functionality using the Boston Logic software is essential to a successful project implementation.

Throughout the Final Testing and Launch process, Boston Logic will also provide you hands-on knowledge transfer and support to ensure that you fully understand how to operate and maintain the Boston Logic software.

In order to get the most value from the platform and ensure agent adoption, it is important that members of your staff be fully versed in its use. You should appoint a Customer System Administrator(s) who will be fully trained on the software's use, implementation, and administration in order to meet the project objectives and unlock the software's full value.

In your seven personalized trainings, we'll review the following:

1. Leveraging the power of the Boston Logic platform via configuration: Part One

2. Leveraging the power of the Boston Logic platform via configuration: Part Two

3. Creating and adding content to your website

4. Managing leads to turn them into customers

5. Managing your client base to grow your business

6. Staying in touch with your clients: Sending newsletters and converting more leads into deals

7. Tracking and learning with your data

You are responsible for completing all of the trainings prior to launch, though you are welcome to opt out if you so choose.

PHASE V: SOFTWARE FREEZE, PRE-LAUNCH PREP & LAUNCH

Software Freeze

Code Freeze means the site is frozen and there will not be any further modifications from either team except as items are identified as broken or incomplete from the agreed upon scope. This is the time to make sure you truly understand how each piece of functionality works within the site so there are no surprises as the platform is rolled out out to the greater team.

What is QA?

QA (Quality Assurance) is the process of ensuring mistakes and errors are found and corrected in a systematic manner that covers the entire site prior to launch. Boston Logic's QA team will be performing cross browser compatibility testing for currently supported versions of Internet Explorer for Windows, Apple Safari, Google Chrome, and Mozilla Firefox.

Website Launch

Once the website build and client training process is complete, your dedicated Project Manager will send you a Website Launch approval form. Once you have filled out the form and returned it to us, your Project Manager will forward your approval so we can proceed with your website launch. Please note that we do not launch a site without approval from you in writing.

PHASE VI: POST-LAUNCH & PROJECT CLOSE

After your website has been deployed, Boston Logic will still be here to help answer your questions, provide ongoing technical support, and plan for your future needs.

Please visit **http://help.bostonlogic.com** to access our knowledge base and for a list of our daily webinars.

The Boston Logic support team is available via **help@bostonlogic.com** or via phone at **617-266-9166 Option 2,** Mon-Fri 8AM-8PM EST.