

Project: Financing Division Intranet

Assignment: Develop an online resource center & training intranet for the financing division of a major healthcare company to help the sales reps of its 13 medical devices/ diagnostics affiliate companies understand the financing options available to their end customers. The Intranet was customized for each of the affiliates, requiring, in essence, 13 different sites. Because of the proprietary nature of the information, only excerpts from the site can be shared.

PRIMARY SPLASH PAGE

[Main Page Text:]

Welcome to the [COMPANY] Resource Center!

Here you will find the marketing materials and informational resources you need for presenting financing options to your customers and helping them arrange financing for their purchases.

To get started, please choose your company name from the list below.

SECONDARY SPLASH PAGE

[ONCE THE USER CHOOSES AN AFFILIATE FROM THE LIST, THE FOLLOWING WILL APPEAR IN THE CONTENT AREA:]

Welcome to the [COMPANY] Resource Center!

This site is provided to help you assist your customers in buying or leasing equipment from you.

To simplify the process of presenting financing options to your customers, we strongly encourage you to go through the [Sales Training](#) section of this site. It provides detailed information regarding [COMPANY] finance programs, the marketing resources available to you, and how to complete the approval process.

The [Resources & Materials](#) section provides access to all the marketing materials and forms you need to present financing options to your customers and arrange financing for their purchases.

For answers on a particular topic, go to the [FAQ](#) section.

To learn more about [COMPANY] and [COMPANY] finance programs, go to the [About \[COMPANY\]](#) section or to reach someone at [COMPANY], go to the [Contact Us](#) section.

We hope this site becomes a valuable resource for you. If you have feedback, suggestions, or questions, e-mail [NAME/Email address].

[SIGNED]
General Manager

Main Navigation:

- [Sales Training](#)
- Resources & Materials
- FAQs
- About [COMPANY]
- Contact Us

SALES TRAINING**[Main Page Text:]**

Sales Training provides all the information you need to support your customers' purchases with [COMPANY] Finance Programs. If you are already familiar with [COMPANY] Finance Programs, think of the Sales Training as a “refresher” course.

There are three (3) modules:

- *[COMPANY] Programs*
- *Presenting Financing Options to Your Customers*
- *The Approval Process*

Each module provides detailed information and includes a short quiz to test your knowledge. The Training Section requires approximately an hour of your time.

To begin, click the button below:



NOTE: I developed the training modules, customized for each of the affiliates, including quiz questions at the end of each module.

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RESOURCES & MATERIALS**[Section Site Map:]**

- **Marketing Materials**
 - Finance Programs Fact Sheet PDF
 - [COMPANY] Financing Options PowerPoint® Slides
 - Presentation Cover Page PDF
- **Applications & Documents**
 - [FIVE DOCS]
- **Resources**
 - [COMPANY] Programs
 - Finance Decision Process
 - Approval Process (STANDARD)
- **Glossary**
 - [COMPANY specific]
 - Leasing Industry

[Main Page Text:]

The **Resources & Materials** section contains all the forms, documents, and marketing materials you need to be successful in presenting [COMPANY] finance programs to your customers and helping them arrange financing for their purchases. If you cannot locate what you are looking for in this section, go to [FAQs](#) or [Ask a Question](#).

Marketing Materials

The marketing materials available on this site are customized specifically for [AFFILIATE COMPANY].

The **Finance Programs Fact Sheet** introduces customers to [COMPANY], the benefits of financing, and various financing options available through [COMPANY]. These can be printed in color from your own printer.

- **To print out a Fact Sheet:** Click on the link below. The sheet will open in a separate window as an Adobe® Acrobat® PDF file. Click “Print” in Acrobat®.
- [Finance Programs Fact Sheet PDF](#)

You can also access the **[COMPANY] Financing Options PowerPoint® Slides**, which provide an introduction to [COMPANY], the benefits of financing, and detailed financing options. These can be added to your own product sales presentation or used as a stand-alone presentation.

- **To download the slides:** Click on the link below. The slides will open in a separate window in PowerPoint®. Click “Sort” in PowerPoint® and copy and paste the slides into your sales presentation. You may need to reformat the slides to match your presentation, but the slides will pick up the background you are using.
- [\[COMPANY\] Financing Options PowerPoint® Slides](#)

The **Presentation Cover Page** can be used as a cover sheet to present the marketing materials and forms in an organized and professional manner to your customers.

- **To print out a Presentation Cover Page:** Click on the link below. The page will open in a separate window as an Adobe® Acrobat® PDF file. Click “Print” in Acrobat®.
- [\[COMPANY\] Presentation Cover Page](#)

Applications & Documents

The application forms and contract documents listed below will open in a separate window. You can fill out much of the information electronically.

- **Be sure to use the correct [Proposal & Application] for the appropriate financing option.** The [Proposal & Application] is in Excel®. Each spreadsheet represents a different financing option.
- Click on the tab representing the financing option(s) you plan to present to your customer.
- Save the form to your hard drive.
- Enter as much information on the form as you can.
 - Type in the Product Code, Product Name, Quantity and Cost or reference the quote number and enter the total.
 - The spreadsheet will calculate the rest.
- Print the form and obtain the customer's signature before faxing it to [COMPANY].
- **Fax** completed documents to: [NAME/Fax Number].

For information on filling out forms, go to [Sales Training](#).

Main Navigation:

- Sales Training
- Resources & Materials
- **FAQs**
- About [COMPANY]
- Contact Us

FAQs**[Left Nav:]**

- [Credit](#)
- [Invoice/Collections](#)
- [Documentation](#)
- [General](#)
- [Shipment Funding](#)
- [How Do I?](#)
 - [Approval Process \(STANDARD\)](#)
 - [Finance Decision Process](#)
- [Ask a Question](#)

[Main Page Text:]

The links to the left provide answers to the most frequently asked questions regarding [COMPANY] Finance Programs. If you cannot find the answers you are looking for, click [Ask a Question](#). Your question will be answered within 1 to 2 business days. If you need immediate assistance, contact [COMPANY] Headquarters at XXX-XXX-XXXX.

Main Navigation:

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ABOUT [COMPANY]**[Left Nav:]**

- [Finance Programs](#)

[Main Page Text:]

[COMPANY] was established in 1985 with the purpose of supporting the business activities of the [PARENT COMPANY] operating companies by providing financial services to their healthcare customers.

Your customers benefit from:

- No lump-sum capital outlay
- Improved cash flow and budget predictability
- No wait for next budget cycle
- Reduced capital competition
- Alternate source of funds
- Immediate procurement of technology update or needed equipment
- Flexible terms and competitive financing rates

You benefit from:

- Stronger competitive advantage
- Increased sales
- Simplified paperwork and process
- Profits retained within [PARENT COMPANY]

[COMPANY] also provides financial support to the operating companies themselves where the financing is for equipment used within the company. This takes the form of either our owning or leasing equipment directly to the operating company or by our reviewing their lease-versus-buy analyses. Additionally in 2005, [COMPANY] will begin providing financial support to suppliers of [COMPANY] affiliated companies that require financing to acquire the assets needed to manufacture [COMPANY] products.