Intranet Design Annual

The Best Intranets of 2009

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Nielsen Norman Group

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Executive Summary

The 10 best-designed intranets for 2009 are:

- Altran, the European leader in innovation consulting and high technology (France)
- Advanced Micro Devices (AMD), a developer of computer and graphics processors (USA)
- BASF SE, the world's leading chemical manufacturing company (Germany)
- COWI Group A/S, a consulting group focusing on engineering, environmental science, and economics (Denmark)
- Deloitte Touche Tohmatsu (DTT), a global professional services network providing audit, tax, consulting, and financial advisory services (a Global member organization)
- Environmental Resources Management (ERM), one of the world's leading providers of environmental consulting services (Global)
- HSBC Bank Brazil (Brazil)
- Kaupthing Bank (Iceland)
- L.L.Bean, a vendor of apparel and outdoor equipment (USA)
- McKesson Corporation, a large provider of pharmaceuticals, medical supplies, and health care information technologies (USA)

Deloitte Touche Tohmatsu also won in 2002 for its Australian member firm's intranet; this year, DTT's worldwide intranet is the winner. As such, DTT joins a very small, elite group of companies that has won the award twice: Cisco Systems is the only other member.

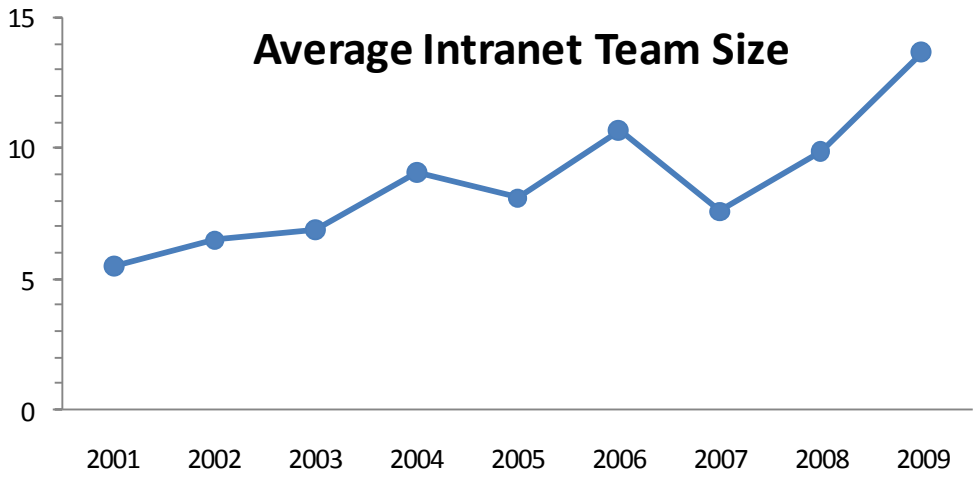
As we've seen every year, great intranets are found around the world and in all industries. This year, we have our first winner from Latin America. We also have the first winners from Denmark, France, and Iceland; Germany and the U.S. have both provided many winners in the past. We have one other first this year: In a sign of ongoing globalization trends, we have one winner that is not headquartered in any individual country and a winner that is made up of independent member firms around the world.

The consulting sector is this year's best-represented industry, with three winners. Given the knowledge-intensive nature of consulting and this year's trend toward more collaboration-focused intranets, this fact makes sense.

BIGGER INTRANET BUDGETS

As we've seen the last few years, large companies dominate among the winners. Among this year's winners, the average organization has 37,500 employees. Even so, fairly small companies like Kaupthing Bank with 3,200 employees can still win. Good user experience doesn't require size or humongous budgets; it requires talent and emphasis on meeting the users' needs.

One of the strongest trends over the years that we've run this design competition is that intranet teams have been getting bigger. As the following chart shows, when we started honoring intranet projects in 2001, the average winning team had six members; today, the average team size is 14.



Pictured: The long-term trend is toward bigger intranet teams, with a growth rate of 12% per year.

Still, what holds for company size also holds for the size of teams: You don't have to be big to win. This year's winners include one team with five members and another team with six members. In earlier years, we've honored winners with one- or two-person teams.

Even this year's average team size of 14 is fairly small when it comes to providing a key work tool for organizations with 37,500 employees on average. One way to leverage intranet staff is to call on external resources as appropriate. Today, the predominant approach to running intranet design projects is to engage one or more consultants and external agencies to contribute parts—and only parts—of the design, while keeping overall control inside the company itself.

This year, six of the 10 winners were designed by some combination of in-house and outside resources. The remaining four projects were done completely by the company's own staff. None of the winning intranets were designed exclusively by an external agency, even though this was a fairly common approach in earlier years.

It's a healthy trend for companies to take more ownership of their intranets and devote resources to building sufficiently large intranet teams. In so doing, they gain in-house expertise in the main areas of intranet user experience. Not all companies can afford intranet teams that are big enough to do everything on their own, however. And, in any case, there are at least three reasons to periodically engage outsiders:

- To get a fresh, independent perspective. People who work on the same project for years can become too accustomed to a certain way of doing things.[1]
- To provide deep expertise or a narrow skill set that the intranet team cannot justify adding to their permanent, full-time headcount.

[1] Disclaimer: Because Nielsen Norman Group sometimes serves this role through impartial usability reviews or unbiased user testing, we might certainly be too sympathetic to the value of an outside perspective.

- To alleviate workload during crunch times, particularly during large redesign projects or rollouts.

STRATEGIC INTRANETS

Bigger intranet teams and increasing internal ownership of the intranet user experience both reflect the intranet's growing strategic role in supporting work processes.

Intranets today do much more than simply host the company phone book and HR manuals—though these components remain critically important, and teams are continuing to improve them. At COWI, for example, designers supplemented employee profiles with a feature that highlights commonalities between directory users and the profiled employees they view (an interesting combination of personalization, social networking, and the traditional staff directory.)

Nonetheless, with bigger teams and budgets and increased respect and strategic recognition, intranet functionality is expanding beyond such basic features. A simple statistic to quantify this trend is the fact that, at 473 pages, this year's *Intranet Design Annual* is the most voluminous ever (326% longer than the first *Design Annual* in 2001, and 31% longer than last year's report). As intranet teams accomplish more, more space is required to document the winning designs.

Another indication of the intranet's growing strategic importance is the fact that ERM is the first winning team that reports directly to the company chairman. As in past years, most other winners report to either Corporate Communications or IT, and having teams report to the top isn't likely to become commonplace. But this year does show dramatically increased executive *visibility* for the intranet in many of the winning organizations. This executive involvement typically results from companies viewing the intranet as a collaboration tool and appreciating the increased business efficiency that a good intranet brings.

COLLABORATION FEATURES

This year's winners showed a substantial increase in both collaboration support and social networking features. Although likely inspired by the open Internet's "Web 2.0" sites, these features often have a much stronger business model within the enterprise, simply because they're more useful and less subject to noise and information pollution by bozos.

The most symbolic instantiation of this trend might be at Deloitte Touche Tohmatsu, where employees can add their own videos to the corporate TV network. Quite the enterprise YouTube.

Teams are also adding Facebook-like features to employee directories to enrich the profiles. That said, the designs are for a work environment—not for commenting on personal photos or supporting teenage dating behaviors. So, while it's appropriate to be inspired by popular social networking websites, your actual user interface and features must be freshly designed specifically for the intranet.

Internal blogs—whether by employees, department heads, or company leaders—were also thicker on the ground than in previous years.

The vast majority of our winning intranets feature CEO blogs. This is not new; we've seen some CEO blogs in earlier years. Indeed, HSBC Bank Brazil's CEO blog started in 2005 and has since been viewed more than 2 million times and accumulated 8,000

employee comments.[2] Clearly, it's a well-established feature. What's new this year is the sheer prevalence of this communications tool; we now have enough good examples to specify nine guidelines for an intranet CEO blog.

Another example of a striking social feature is ERM's interactive forum. This tool has achieved mission-critical status in allowing consultants to post urgent requests for advice from their colleagues around the world. The forum has virtually eliminated panicky broadcast emails at ERM, thus improving the productivity of the many knowledge workers who are no longer interrupted by requests that they might have no qualifications or experience to solve. Even more important, this community feature often helps the company quickly construct better proposals for key clients on short deadlines.

PERSONALIZATION AND CUSTOMIZATION

As many of this year's winners show, intranet personalization is becoming increasingly sophisticated. The leading application of personalization is to provide each employee with news updates focused on their job role and personal interests. If intranets show everyone everything, information overload ensues and people either ignore the news area or squander their time reading irrelevant stories.

Simple customization can often generate sizeable productivity wins. For example, at McKesson, sales people can create a *My Product List* and *My Favorite Reports*, freeing them from having to wade through the much longer lists of all available options. Much appreciated when you're on the phone with a customer and would prefer to focus your mental resources on closing the sale, rather than navigating the intranet.

At AMD, users can customize links directly in the main menu bar, which integrates the user's personal favorites much more tightly with the intranet navigation than the traditionally separate *Quick Links* feature.

Multilingual intranets also make good use of personalization to increase usability by presenting pages in the user's preferred language as much as possible. At BASF, the main user interface elements are available in 13 different languages, and several other winners also have internationalization and localization support that goes far beyond what we see in most Internet websites.

TECHNOLOGY PLATFORM: UNIFICATON BEGINS

In all previous years, the only conclusion regarding technology was that there was no universal platform for designing good intranets. Winners typically used an extraordinarily wide diversity of implementation packages.

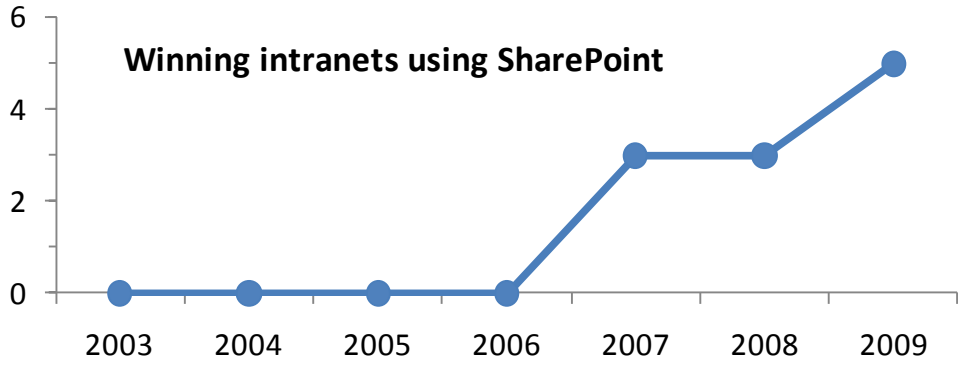
Although this conclusion continues to hold this year, it is less pronounced.

Among the winning intranets, many are built on a single intranet platform that integrates most of the supporting features they need—including a content management system (CMS) and search. Some winners supplement their main platform with a few selected tools for specialized purposes—mainly Web analytics. If we were to hazard a prediction, it would be that traffic statistics, search log analysis,

[2] These statistics imply about one comment for every 250 employee viewings of the CEO blog, a level that's consistent with other research on user participation in online communities. You can use this level as a rough benchmark to assess whether your own CEO blog is sufficiently inviting of employee participation.

and other analytics tools will be substantially beefed up and integrated in future releases of the main intranet software platforms.

In total, the 10 winners were built on 26 different products—substantially fewer than the 41 used in 2008 or the 49 used in 2007. Most impressively, fully half of the winning intranets used SharePoint, especially the recent MOSS platform (Microsoft Office SharePoint Server 2007). As the following chart shows, SharePoint use has grown dramatically in recent years. This is particularly impressive given that, from 2003–2006, the winning intranets didn't use earlier versions of SharePoint at all.

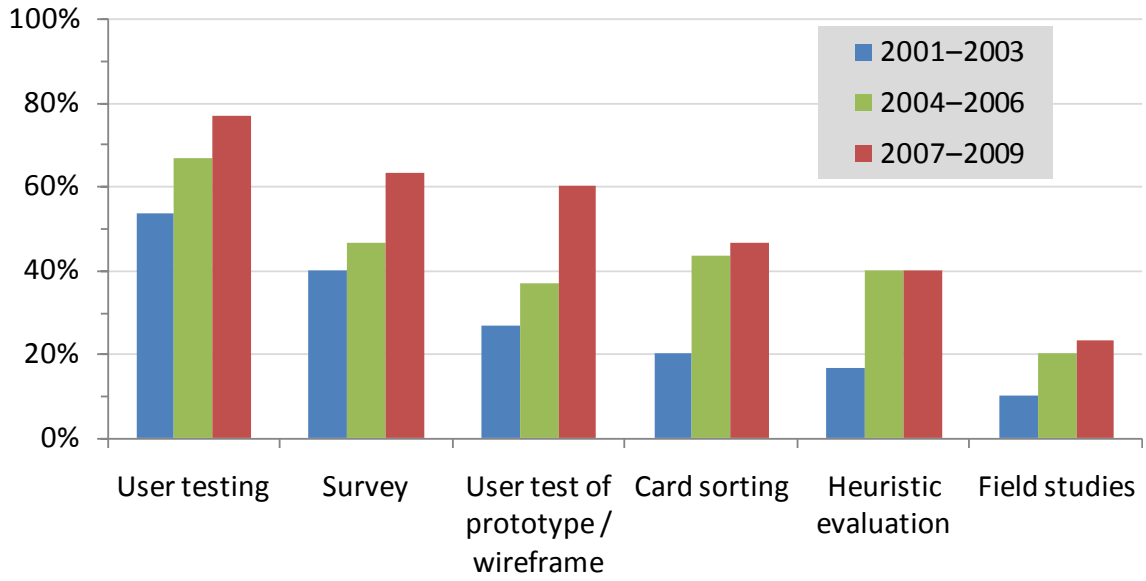


Pictured: Microsoft SharePoint has seen substantially increased use among well-designed intranets in recent years. (In 2007, Microsoft's own intranet was a winner, and they obviously used their own software, so the 2007 dot should be a notch lower if you consider only third-party projects.)

Despite this big growth in SharePoint use among the best intranets, the contest is far from over for intranet software platforms. Many other good enterprise software vendors offer widely used solutions. This year, for example, multiple winners used Autonomy, Google Search, and WebTrends.

USABILITY GROWTH

Over our intranet award's nine-year history, we've seen a steady increase in user-centered design. The following chart shows the proportion of winning intranets that employed various methods across three different three-year periods. The use of all methods has substantially increased; it's particularly gratifying to see the extent to which designers are embracing paper prototyping and other low-cost testing methods.



Pictured: The percent of winning intranets that employed some of the main usability methods in their design process.

To assess the ROI of intranet redesigns, teams primarily relied on usage metrics in terms of users, visits, or page views. Across this year's winners, the average increase in usage was 106%. This is about the same as we've seen in previous years: The average usage increase in the 2005–2008 winners was 110%. So, roughly speaking, improving an intranet's usability will double its use.

L.L.Bean conducted a benchmark study comparing their old and new designs. The old intranet had a success rate[3] of 67% and an average time-on-task of 1 minute and 52 seconds. The new intranet has a success rate of 88% and users require only 54 seconds on average to perform the same tasks. In other words, users can perform more than twice as many tasks per hour with the new design. This improvement is somewhat more than the average across our intranet usability metrics benchmarks, but then L.L.Bean does have an award-winning intranet.

[3] The success rate is the proportion of time users are able to successfully do something they are trying to accomplish on the intranet. The failure rate (1–success) indicates how often users either gave up or did the task wrong. The average success rate was 80% across 13 intranets tested in Nielsen Norman Group's most recent benchmark project (the full benchmark results and methodology are available at http://www.nngroup.com/reports/intranet/guidelines/).

Overview of the Winners

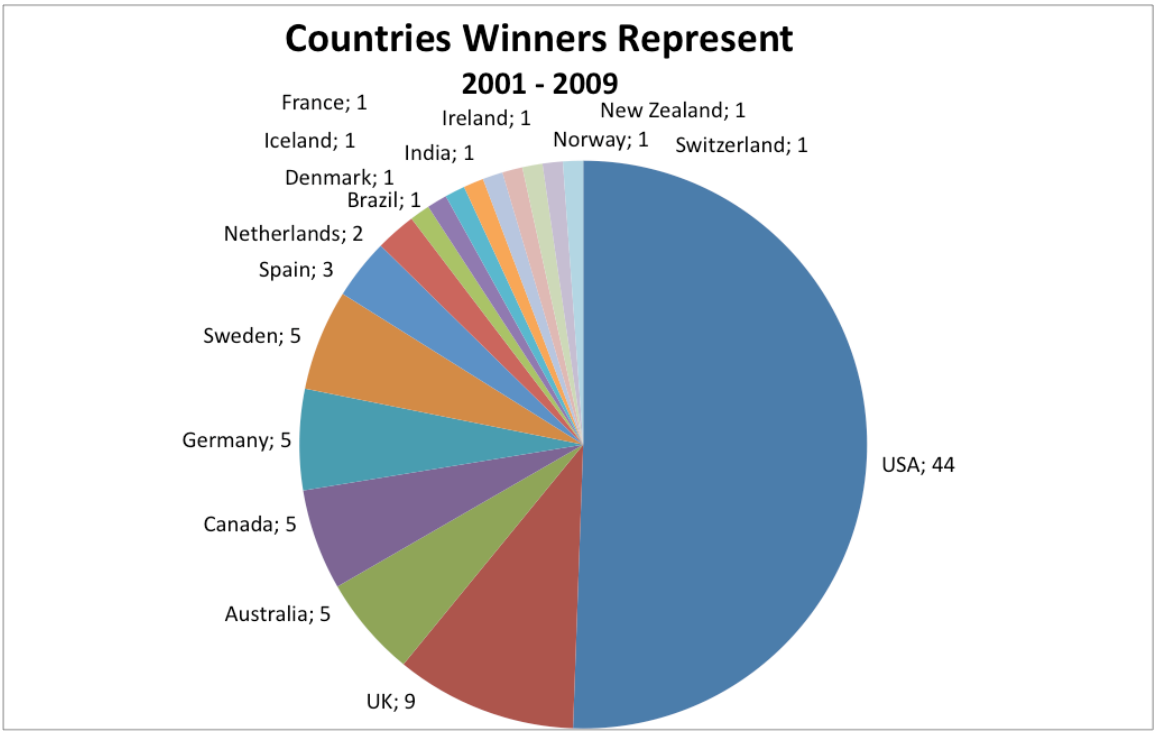
As in past years, the 2009 Design Annual winners emerged from widely different backgrounds and diverse development experiences.

SIX COUNTRIES

The 10 winning intranets serve organizations based in six countries: the US had three winners and five other countries had one winner each. Those five countries are Germany and four countries that are making their first-ever appearance in our DA: Brazil, Denmark, France, and Iceland. And, as is appropriate to our times, one of the remaining winning organizations has remote employees throughout the world and claims no country as its headquarters and the other is a global network of independent member firms.

2009 WINNERS	
COUNTRY	**NUMBER OF WINNERS THIS YEAR**
BRAZIL	1
DENMARK	1
GERMANY	1
FRANCE	1
ICELAND	1
UNITED STATES	3
NO ONE HQ COUNTRY	2

As the following chart shows, since 2001, 18 countries have been represented in the Design Annual.



Pictured: Since 2001, 17 different countries have boasted DA winners.

SIX INDUSTRIES

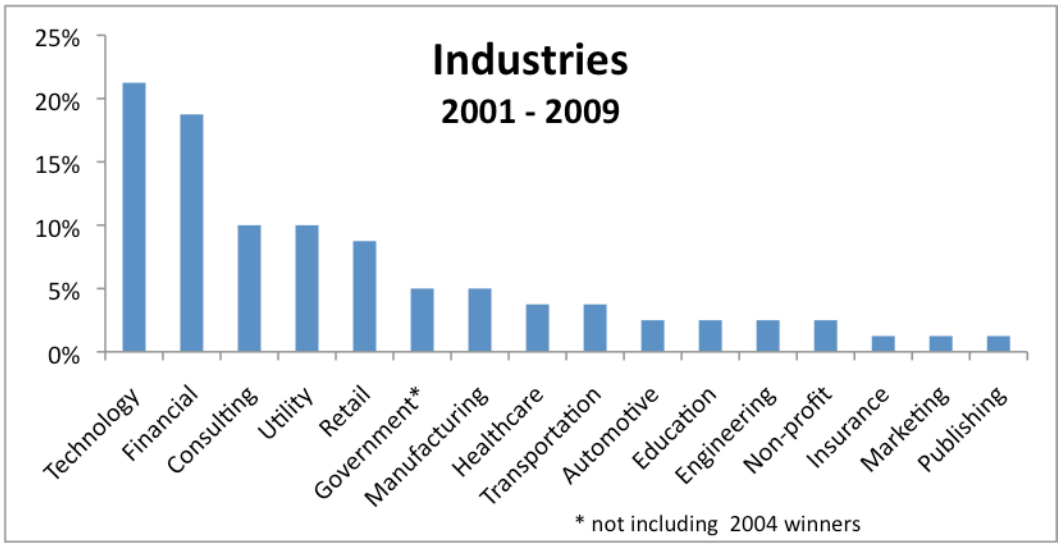
This year's winning designs span various industries and specialties:

- Consulting (3)
- Financial services (2)
- Technology (2)
- Retail (1)
- Manufacturing (1)
- Healthcare (1)

For the first time, not one but three consulting services agencies are among the winners.

Each year, we've had at least one winner from the finance industry and one involved in technology. Even with the volatile markets today, this year features two winners each in the financial services and technology industries.

The chart below shows the breakdown of industries that have produced winning intranets since our first DA in 2001.



Pictured: Since 2001, winners have represented many industries, with technology and financial services leading the pack. In 2004, we focused our DA specifically on government agencies, so we've excluded those 10 winners from this chart.

LARGE AND SMALL WINNING ORGANIZATIONS

In the very early DAs, a majority of winners hailed from small organizations. But in each year up until 2006, the average organization size increased (the 2004 report focused only on government agencies, and thus is not representative). In 2007, 2008, and now 2009, however, the little guy has been making a comeback.

This year, the average organization size is 37,500 employees, which is less than 2008 and 2007, and more on par with what we saw in 2002. This year's largest winning organization is Deloitte Touche Tohmatsu with 165,000 employees. The smallest is Kaupthing Bank with 3,200 employees.



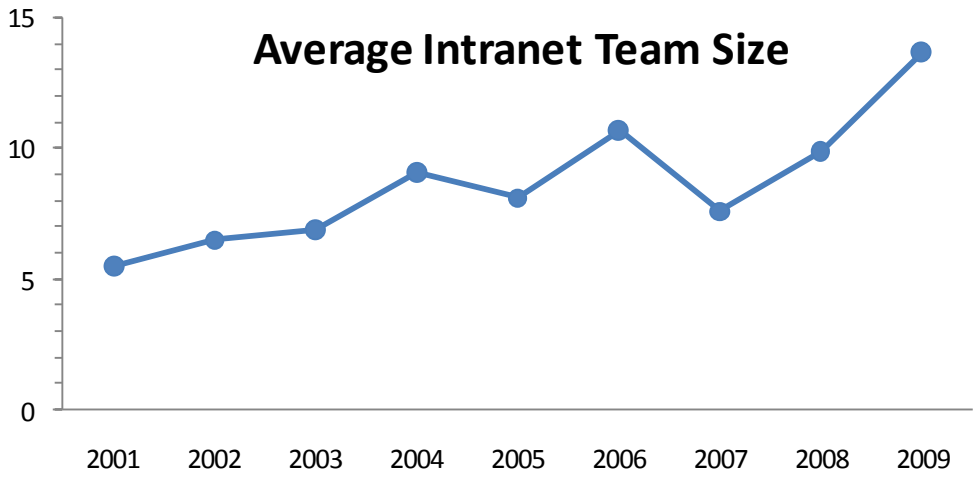
Pictured: From 2001 to 2006, the average organization size increased each year. But, beginning in 2007, the average size has been decreasing. (The 2004 report included only government agencies, so it doesn't represent a cross-section of different types of intranets.)

LARGER TEAMS (THOUGH STILL RELATIVELY SMALL, GIVEN THE WORK THEY DO)

Across the winners this year, intranet team sizes ranged from eight to 36 people, with some team members working part-time or as external consultants. The average team size is 14 people. Given that our winners' list contains smaller organizations overall, it's interesting that the team sizes are getting larger.

Having more people doesn't necessarily mean increased person hours because more people are working on intranets part-time. But the larger team size does translate into more viewpoints and ideas.

Also, having more people working on the intranet is likely a testament to the increasing importance of intranets and their corresponding growth. Larger teams make it easier to perfect the intranet's countless features, include all of the organization's individuals and groups, and keep information updated and accurate.



Pictured: Generally, intranet team size has been growing steadily, with a dip in 2007. For highlights on individual teams, see the "Intranet Team" section in each company profile. The aggregate growth rate is 12% per year.

IN-HOUSE AND OUTSIDE TEAMS WORKING HARMONIOUSLY

Four of this year's winners (down from six last year) used only in-house resources to create their designs. Six winners (up by three from last year,) used some combination of in-house resources and outside firms. None of the winning intranets this year (as opposed to one last year,) was designed exclusively by an outside agency.

Among the 2007 winners, four used some combination of in-house resources and outside firms. Prior to 2007, winning intranets were often created primarily by third-party Web design firms.

Contest results from the last few years indicate that outside firms are getting better at working with internal designers, and vice versa. Each group has specific strengths that are apparently being better utilized. Outside agencies bring valuable expertise and design experience and a fresh eye. Internal teams provide knowledge about the industry, the company's employees, and the needs and priorities of the organization itself.

THE 10 WINNERS *IN ALPHABETICAL ORDER*	
Altran (France)	The Altran designers understood the importance of creating a task-based, scalable information architecture (IA). In designing their intranet, team members made some disciplined decisions, trusting their task analysis and user research to direct them.
Advanced Micro Devices (AMD) (US)	The AMD intranet is testament to the fact that anything can be done in a short time if you have the right team in place and the team is very driven. Although time was not on their side, these determined designers were still able to achieve huge gains in their redesign.
BASF SE (Germany)	Moving with the times, the designers of BASF.net made very good use of Web 2.0 features. Designers used these capabilities in very thoughtful ways that actually improved the user experience. BASF.net not only supports efficiency for each user's daily work, it also ensures that people can experience "BASF – The Chemical Company" online as a truly global brand.
COWI Group A/S (Denmark)	The COWIportal designers greatly improved the site's personalization features, making it easy for consultants to find their own information. Collaboration and knowledge sharing are also prominently featured, along with the unsung heroes of fabulous graphics and simple, clean text.
Deloitte Touche Tohmatsu (DTT) (a Global member firm)	The DTT intranet is a vehicle for knowledge sharing and seamless integration. Designers from across the organization thoughtfully balanced the autonomy of groups and locations across DTT, while still answering the need for information sharing and a seamless interface across the entire intranet.
Environmental Resources Management (ERM) (Global)	Minerva, the ERM intranet, supports 3,500 staff located all around the world in more than 140 offices in more than 40 countries. Designers implemented several inventive collaboration features to enhance collaboration among consultants, ultimately enabling them to give the best service to their clients.
HSBC Bank Brazil (Brazil)	The HSBC Brazil intranet is a showpiece for communication, which is key for an organization with 26,000 employees located in 565 cities across the country. The intranet's communication vehicles help employees feel heard, and remind them that they're part of a large but still cozy community at both HSBC Brazil and HSBC as a whole.
Kaupthing Bank (Iceland)	Kaupthing Bank's investment in work tools and communication is matched by its commitment to respect and embrace all employees on a more personal level. The intranet designers effectively reflect these priorities with interactive features and good content about people that seems neither forced nor overdone.
L.L.Bean (US)	The L.L.Bean designers worked through barriers together, employing creativity and ingenuity to create an intranet that readily informs and communicates with the company's employees.
McKesson Corporation (US)	Each McKesson employee probably thinks McKNet was created especially for him or her. And in some ways, it was. This intranet supports a truly inspiring amount of flawlessly implemented personalization features.

Common Themes Among the Winners

One might think we've seen great changes in the common themes related to intranet development since 2001, when we began producing the DA. And there have certainly been changes—particularly in technology and the way designers and employees use it. But, despite such changes, we're still seeing a continuation of many of the same trends that emerged in our first report eight years ago.

WEB 2.0: COMMUNITY AND SOCIAL

Social networking and the intranet: A marriage made in e-heaven.

Web 2.0 features are flexing their muscles in today's best intranet designs. But they're not being included just for the sake of offering the latest and greatest features. Teams are putting them to good use.

Designers have discovered ways to integrate social networking, blogs, wikis, and video sharing to help employees be more productive and well informed. And, as a result of these new technologies, some intranets are bringing more personal information into the workplace. This works well if it matches the corporate culture.

As a testament to how important and helpful this movement has become, every winner this year offered one or more social features. Intranet designs often come about because of user expectations developed through their Web experiences. As social networking's popularity increases, more employees will expect such features on their intranets, too. Further, the intranet is a perfect place to use social networking because it can help employees share information and knowledge and find the right people for a job.

Examples from this year's winners include:

- AMD offers blogs, forums, and calendars. The virtual *Idea Box* allows employees to submit ideas of any type.
- Altran's intranet has collaborative spaces, both public (accessible to all employees) and private (accessible to members only). The intranet also lets employees broadcast requests for help, and mark those requests as "urgent" when appropriate and as "solved" once the issue has been addressed.
- BASF integrates Ajax and various social networking applications. The homepage's *Info-Film* shows a current video.
- The COWI A/S intranet supports document and task handling, while its *In Common With You* section highlights common interests when a user views a colleague's profile.
- The DTT intranet encourages user participation through polls and calls for story and video submissions, and encourages comments on a variety of blogs, including one from the CEO. The intranet's TV network lets employees add their own videos, a la YouTube. And *After Hours* offers a peek into employees' personal interests.
- ERM makes use of blogs and wikis, while the site's interactive forum lets employees seek urgent advice/input from colleagues.

- The HSBC Brazil intranet's *President's Blog* and discussions are popular, as is the interactive bar, which features interactive tools such as surveys, quizzes, and marketing research. The intranet also features a link to the comprehensive HSBC-TV.
- Kaupthing Bank publishes a weekly employee profile and employee birthdays on the intranet. And anyone in the organization can start their own blog.
- The L.L.Bean events calendar is planned a year in advance, and the site's personal photos are very engaging.
- McKesson lets users post a variety of personal information and documents, and also lets them post their own blogs.

Traits of a Good CEO or Management Blog

Having a CEO blog is a good step toward better communication and connection between upper-level managers and the people they lead. But it has to be done right. Some of the better CEO Blogs we saw this year had the following traits:

- Easy-to-find (often linked to from a homepage blurb)
- A clear, close-up picture of the person that makes them look approachable
- Short posts—typically fewer than five paragraphs (even one or two paragraphs is fine!)
- Posts that describe a personal experience and circle back to reference its business relevance
- A writing style that was less formal than other intranet content
- Information aimed at helping the business
- A call to action, call to discussion, or question to ponder
- A simple way for employees to participate, respond, and read other responses

User Interface Elements for Lists

Lists of items—such as news or videos, announcements, or even blog entries—should include the following key elements to help users get a sense of the entry's content:

- Title (that links to the item)
- Date the item was posted
- Author (not required for a specific person's blog posts, but it is necessary for responses)
- A brief summary of the item
- A link to more/archive
- For video, the clip's length (such as, "3 min 25 sec")
- A sort feature that lets users sort the list by various attributes, such as date, author, or category

These items should also be included in your site's search results.

How the intranets got started

Although the winning intranets varied—having disparate goals, history, technology, politics, and personalities—their beginnings were often quite similar.

Generally, they followed one of two paths. Imagine, for example, that you need to make a large birthday cake. You might choose to:

1. Make a big cake from scratch, mixing flour, eggs, sugar, vanilla, and other raw ingredients and cooking it yourself.
2. Create the cake by combining several already-baked cakes. In this case, you might acquire some cakes from lovely patisseries with temperamental pastry chefs, and others from standard bakery departments at low-end supermarkets. You'd then piece the cakes together to create one big birthday cake.

So, would you prefer the "from scratch" method or the smorgasbord cake? This is the question—minus the yummy dessert—that some intranet developers confront. If they have a choice, that is. Often, developers are forced to either start from scratch (sometimes with little clarity about their mission) or find ways to make something good out of many existing intranets that vary both in quality and in the willingness of their stakeholders to get involved.

Either case is a challenge. The greats, like those in this report, plan, cajole, strategize, and muddle their way to a tour de force intranet.

ERM is in the minority here, having chartered a systematic set up of the intranet with the clear goal of facilitating information sharing among teams. This goal was established to support ERM's global knowledge sharing vision.

More commonly, intranets are born in several different departments focused on their own specific goals, with little consideration of the overall organization. So, while starting from scratch might seem daunting, it's possibly easier than searching for all the silo intranets and pages and reconciling all of their information.

At AMD, for example, they created an intranet to aggregate and better share knowledge. Because the organization already had many existing sites, however, the IT group had to work to unify them to create one clean, recognizable design.

Similarly, designers at Altran endeavored to create an intranet that would work in tandem with the corporate goal of consolidating its 200 different subsidiaries—each with its own leadership, culture, and collection of intranets—into one strategic, centralized organization.

The DTT intranet was originally developed to host the people directory and serve as a repository for basic knowledge management information. However, it rapidly evolved into an intranet platform used by multiple countries, with content displayed in multiple languages. Today, it hosts a multitude of tools and content for the entire organization.

The L.L.Bean intranet grew organically as information was needed—and, by 2004, L.L.Bean was a billion-dollar company with no centralized corporate intranet. In recent years, the company's intranet has evolved to fix the issues raised by the disparate systems.

In previous DAs, we saw how some of the best intranets emerged from corporate mergers. The AMD intranet follows in this tradition, offering a good example of what great output teams can achieve when pushed to create a better intranet after a merger.

TEAMS AND LEADERS

It's very difficult to determine who is actually on an intranet team. With consultants fading in and out, and team members often holding a few jobs—designing or otherwise working on the intranet being only one of them—determining who is actually a team member is not easy. If you're in a situation where you feel your "team" is somewhat piecemeal and fluctuating, take solace. Some of the best intranets in the world, this year and in years past, have been designed this way.

What all of the best intranets have in common is at least one person who is officially responsible—and, perhaps more importantly, *feels* responsible—for the intranet's design. Having a leader who keeps the ball rolling in the right direction is imperative. Remember: George Washington's army beat King George's mighty, near-perfect army with a bunch of silversmiths and cobblers who often ducked in and out of battles as they pleased. It's amazing what a group like this can do if they have the right leadership.[4]

PERSONALIZATION

Personalization has come such a long way on the intranets of today. Organizations are fostering the infrastructure that will support an intranet model that actually knows individual users and helps them get what they need. Today's intranets personalize news, tools, project information, and more.

Most of our winning intranets offer some form of personalization or customization. McKesson Corporation pushes personalization to the limit, sending news to users based on their background. It also offers personalized work-related content and tools, enables a single sign-on to 27 internal applications, and provides customized company-wide alerts and unit-specific branding and promotions.

Kaupthing Bank's intranet offers personalized news and an entire personalized area for each individual.

The DTT intranet serves up local news and information specific to particular teams. And COWI does a great job pulling from different sites and personalizing for each user. News can be published from any site and will be seen on the front page of the homepage by employees in the target audience. Events can be published from the event calendar on any site and are also targeted to user groups. Users can create alerts and specify any items or lists on the portal to be shown on their homepage?

BASF SE enables users to customize as they see fit.

NEW EMPLOYEES

The intranet can help new employees get the lay of the land and even be productive more quickly. An increasing number of intranets are helping employees get started in their new work environment. New employees don't want to continually ask their managers and coworkers annoying questions. Most people would rather be independent from the start. The intranet can help them do just that and find answers to many of their questions.

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[4] Whether or not you like war stories, 1776 by David McCullough details the interesting accounts of how George Washington was able to complete what seemed like an insurmountable leadership job with the often part-time, disagreeable, and sometimes even insalubrious Yankees. Intranets managers might learn some good lessons from this read.

McKesson Corporation's intranet offers new employees a *Welcome* program. HSBC Brazil maps out events that new employees should take part in or initiate based on the new hire's tenure: *First week* (*Primera semana*), *First Month* (*Primero mes*), and *First Quarter* (*Primero trimester*). These sections contain information and steps for new employees to follow.

Today, organizations like ERM are also using intranets to help existing employees get to know the new people. The ERM intranet introduces consultants to new hires right on the homepage, making e-introductions at the start of every workday. A picture of the new employees, along with their names and company location, gives other employees a snapshot of new hires; clicking through a link lets people read more about each person.

Kaupthing Bank uses the intranet to profile five randomly chosen employees each week.

In a different twist on helping new people, the COWI Group offers basic explanatory information to help new employees. For example, a graphic describes a project's process from beginning to end. The graphic and its accompanying information can also help existing employees remember the steps in projects they haven't worked on in some time.

More intranets are also presenting people's job titles, affinities, and projects in their employee profiles. This helps both new hires and existing employees find the people they need.

Altran

Using the intranet

Altran is the European leader in innovation consulting and high technology. The group's 16,000 consultants operate worldwide, covering the entire range of engineering specialties, including electronics, IT, quality, and organization. Altran offers its clients ongoing support throughout the innovation cycle, from technology watch, applied basic research, and management consulting to industrial systems engineering and information systems. Altran has six business lines: Aerospace & Defense, Automotive & Transportation, Energy & Industry, Financial Services, Healthcare, and Telecoms & Media.

Headquarters: Paris, France

Number of employees the intranet supports: 17,500

Company locations: Altran has offices in more than 20 countries. The intranet is accessible over http to any employee in the world. Most employees work in Europe, but the company also has employees in countries such as the US, Brazil, China, and Japan.

Annual sales: €1,591.4 million (May 2007).

Design team

Three people from the Marketing and Communication teams drove the project design.

Three people handled the technical design: an Enterprise Content Management (ECM) and SharePoint consultant from the Altran ECM practice, and two IT department employees.

The Web agency Tequila Rapido provided graphical design services.

Members

In-house: Olivier Siganos, program manager; Hervé Audouin, electronic content specialist; Amantia Kapo, internal communications specialist; Etienne Gonnaud, ECM practice leader; Thierry Pelé, information systems manager; Benjamin Rouard, information systems project leader.

Tequila Rapido: Toufik Lerari, managing director; Virginie Chelles, project Leader.

SUMMARY

If any designers understand the importance of creating a task-based, scalable IA, it is the Altran intranet designers. The organization comprises 200 different subsidiaries, all with different leadership, culture, and intranets. Work was duplicated many times across the organization and there was very little sense of unity. In 2005, the Altran group decided to move toward a new strategic, centralized organization and consolidate to 85 entities; that same year, the company's global intranet was born. This intranet enabled the organization to provide transactional applications and decentralized publication. Altran's designers created it with the solid foundation of thorough usability research and clear goals for both the intranet and the organization.

Because the organization had been through considerable changes already, the Altran intranet designers knew they needed to develop an IA that would accommodate the present as well as the future. They therefore conducted significant usability research and other organizational investigations to inform their design. Through this work, they developed Direct, Altran's new intranet, which demonstrates fluidity, knowledge, and empathy for users.

Homepage Features

Direct's homepage starts with a banner that (of course) includes the intranet's name, but also conveys movement and unity among employees around the world. To keep the design fresh, the team changes this banner at the beginning of each season. For summer 2008, for example, a bright yellow and orange banner shows a subtle sun and palm trees that mingle nicely with employee silhouettes and a world map.

Below the banner, a prominent open search field lets users search the whole intranet, search the Web (through Google), or search for employees. To the right of the search field, the *I need to find* list offers links to commonly accessed sections.

The homepage offers a mix of personalized and customizable features, some of which are dictated by the user's login profile. For example, the country where the employee is based dictates the country section. In the example below, the user sees *Italia*. Users can personalize the *My RSS* section content using the nearby *settings* link.

The homepage's right-hand column shows the user's list of communities, which are congregations of people and information related by a common interest. Employees can use the *Communities directory* to join a community, or create one using the nearby *Create a community* link.

The *World Knowledge* section features information that Altran employees around the world should know, including information about groups, people, policies, procedures, and benefits.

The *Weather* section defaults to a weather forecast for the Paris headquarters, but users can change it by clicking the section's *settings* link.

Picture of the Day

The *Picture of the Day* displays an employee-submitted photo and description. In the screenshot below, for example, the photo caption reads: *Boccaccio Street*, *Certaldo – Italy.* To submit photos, users click the *Send your picture of the day now* link. Submitted pictures go to Direct's editorial board, which selects and publishes the photos.

Altran's intranet team created two new and original twists on the standard "photo of the day" feature. First, designers made it possible for users to see a slideshow of the daily photos via the *Watch all the pictures* link. Second, they created a downloadable PDF calendar that showcases photos from the previous year.

User Research

The team's research identified the above features and areas as important to users. Team members also did some disciplined work in their task analysis. Specifically, they addressed four basic user needs by creating the following four global navigation tabs/sections:

What's new?: became the *News* tab/section in the global navigation

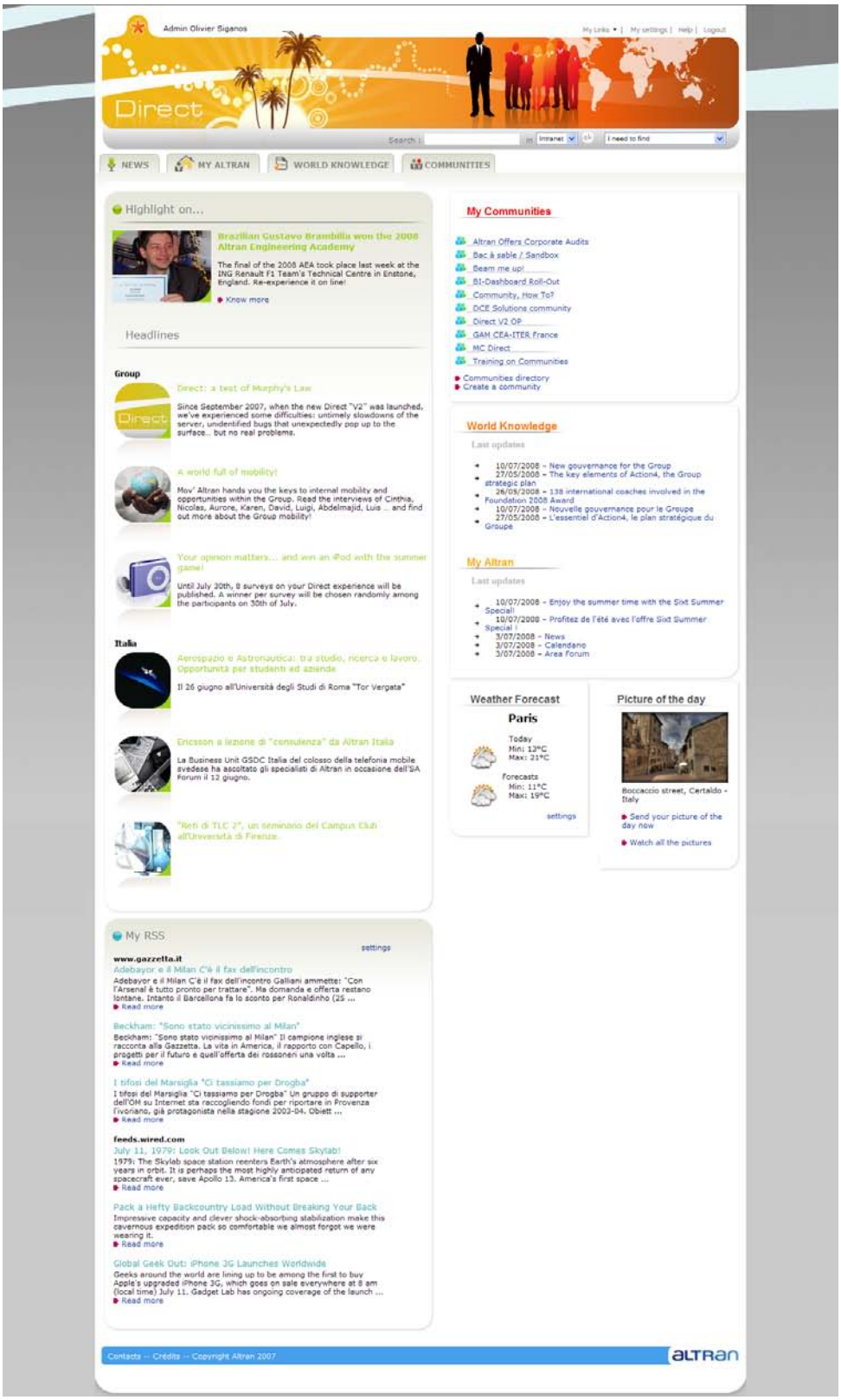
What service can I use?: became the *MyAltran* tab/section in the global navigation

I want to know…: became the *World Knowledge* tab/section in the global navigation

- **I need to share and collaborate:** became the *Communities* tab/section in the global navigation.

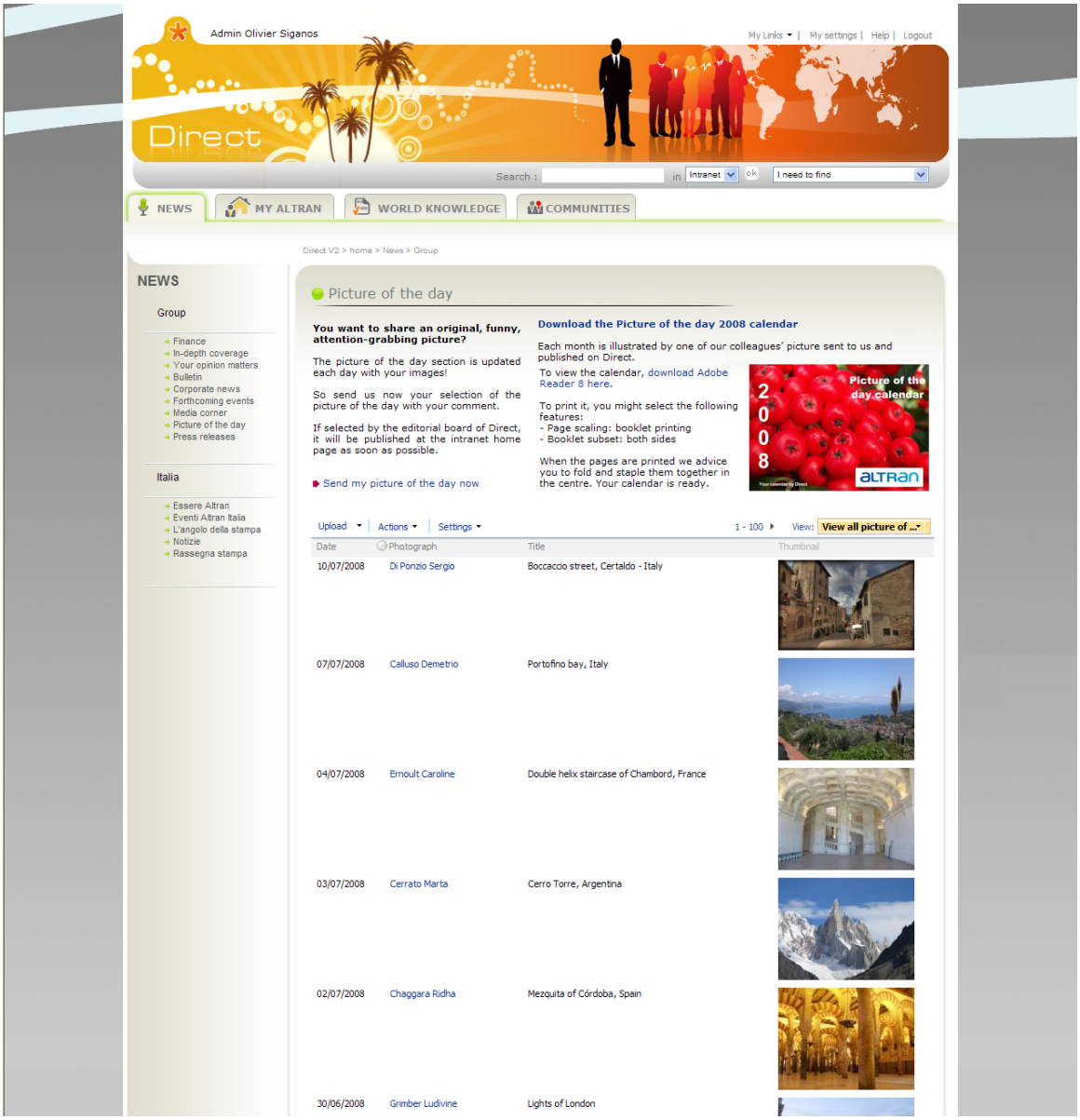
This task-oriented navigation structure allows the organization to change the sections as needed, without having to update the intranet.

10 Best Intranets: Altran



Pictured: Altran's Direct intranet homepage as an Italian employee would see it. The *Group* and *Italia* sections are based on this particular user's background. Users edit the *My RSS* and weather sections themselves.

The *Picture of the Day* section shows the picture of the day, notifies employees about how to submit pictures, and offers a downloadable calendar of previously displayed photos. It also shows a list of recent pictures of the day, as well as the date they were posted, who took the photos, the title of the photos, and thumbnail images.



Pictured: The *Picture of the Day* section displays the date the photo was posted, the photographer's name, the photo's title, and a thumbnail of picture.

The *News*, *My Altran*, *World Knowledge*, and *Communities* sections are accessible via simple tabs that, when selected, display a green, yellow, orange, or red border, respectively.

Pages throughout these sections have the same style and look and feel, which sends the message to all employees that they're a coherent group.

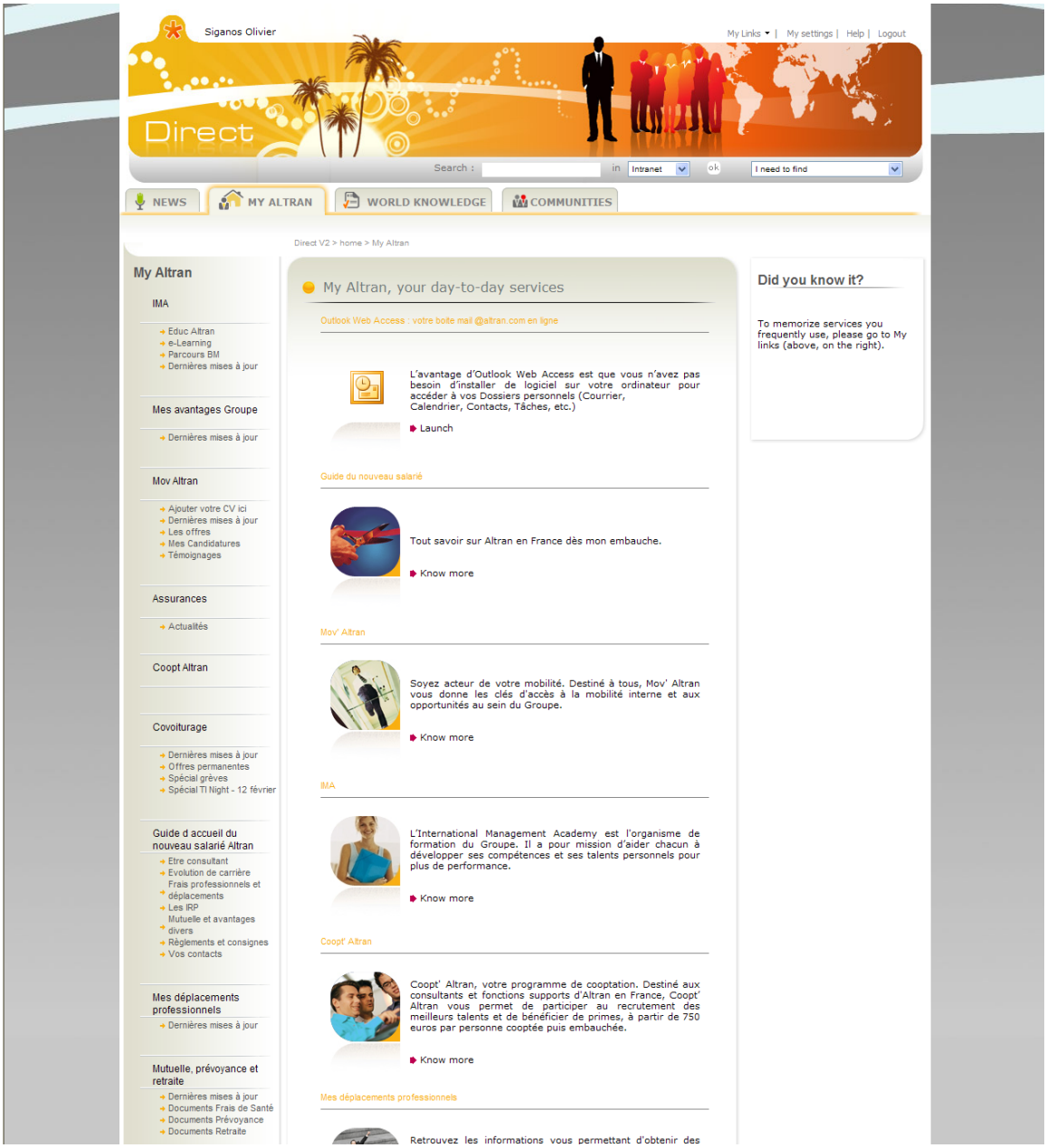
In the intranet's *News* section, users see the same categories as they see on the homepage, plus *Group* and one for their respective country. Each of these sections has a category page and a category-specific news sub-section.

To suggest a news stories, users can select the link on the right: *Want to suggest a news story? Contact the team MarCom*. (In Italian, it says: *Vuoi suggerire una notizia? Contatta il team MarCom.*)



Pictured: The *News* section's main page on the intranet for Italian users includes a section for *Group* and *Italia.* Current news items appear in the page's content section.

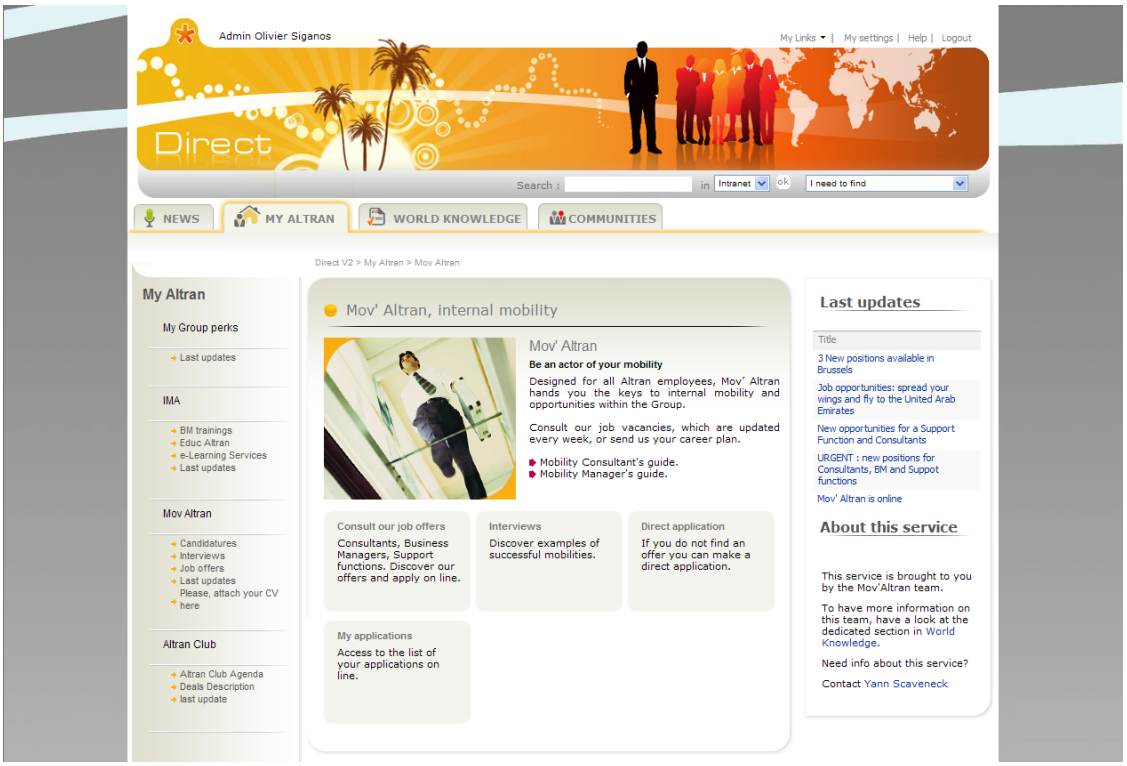
The second tab in the global navigation leads to *My Altran.* This links to all of the day-to-day services that people commonly need, such as webmail, hiring, benefits information, human resources (HR) forms, internal training, booking travel, filling out timesheets, and submitting expense reports. This list of features might change (plus or minus) based on services offered by the user's group, country, or subsidiary. The main page offers links to common activities, while the left-side navigation offers links to much more.



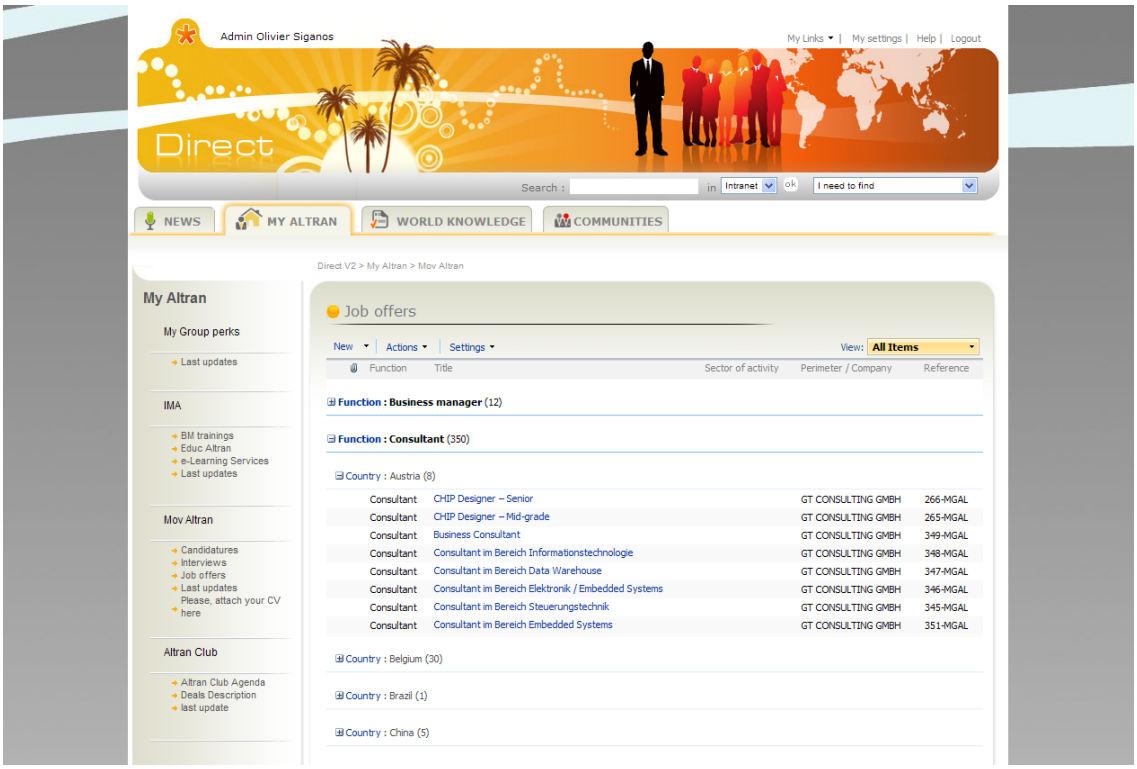
Pictured: *My Altran* offers links to all of the day-to-day services that people commonly need, including webmail, hiring, benefits information, HR forms, internal training, booking travel, filling out timesheets, and submitting expense reports.

Another feature in the *My* Altran section is the *Mov' Altran* area. Promoting and retaining good, happy employees is important. This section encourages and assists people in changing their jobs within the organization. The intranet posts "mobility" guides for employees and managers. These guides let users review job postings, apply, and manage applications. Users can also read case studies of people who have successfully changed positions within the organization.

10 Best Intranets: Altran

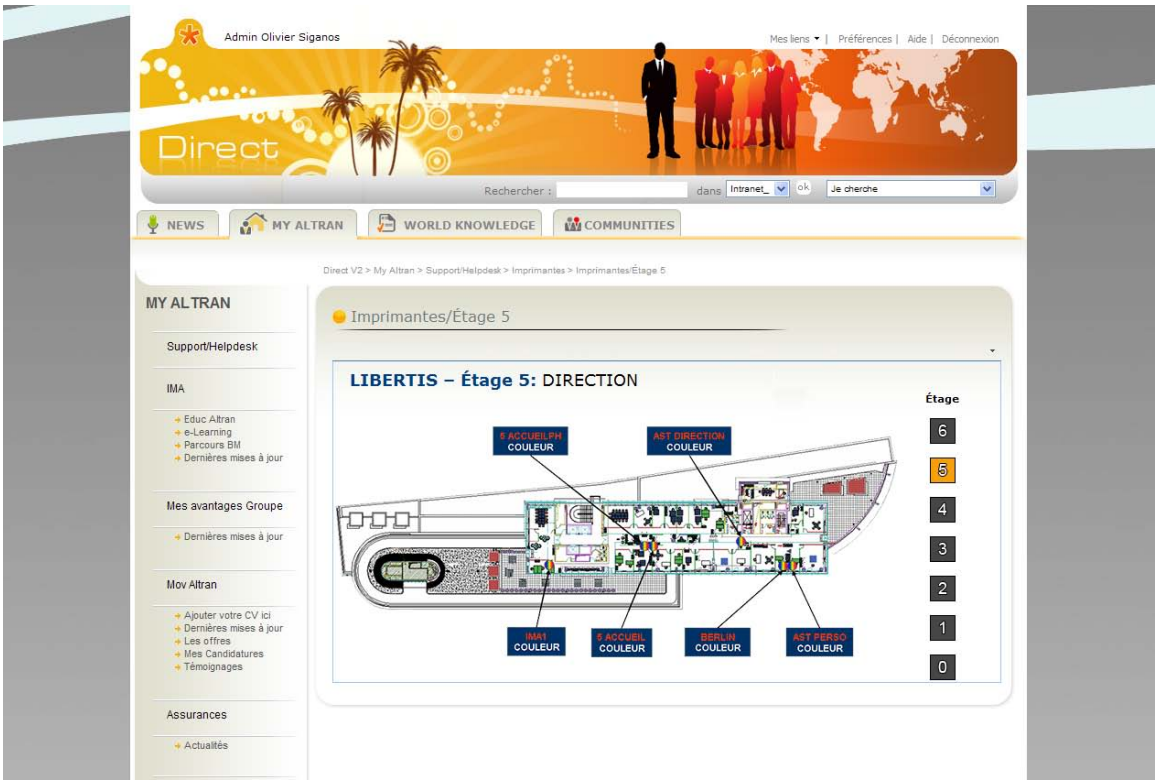


Pictured: The *Mov' Altran* area encourages employee retention by encouraging and instructing them on how to change jobs within the organization.



Pictured: The list of jobs can be sorted by several criteria, including country, function, and title.

Among the *My Altran* section's many helpful features are its building maps. A nice additional touch that the design team added to traditional office maps is the locations of printers and associated drivers. The *Floor* (*Etage*) column on the right side allows users to choose any building floor and see the associated information.

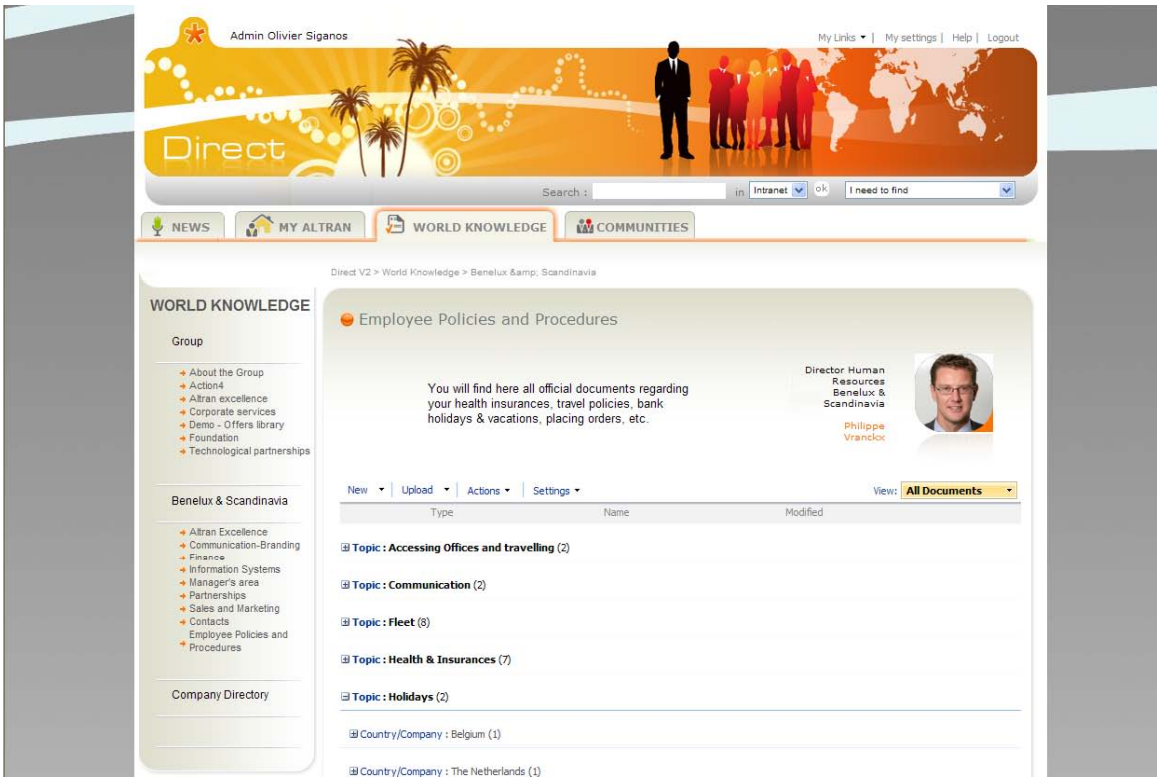


Pictured: Maps of buildings include locations of printers and drivers. The image above shows the fifth floor for the selected building.

The intranet's *World Knowledge* section maintains a familiar look and houses reference information such as who is in governance, on the management board, in HR, or a part of the Altran Foundation and provides information on each group. The section offers access to business-critical knowledge such as project reference, business solutions, partnership, and project or commercial templates. It also houses technical documentation and IT support, organization charts, roadmaps, and libraries, among other things. All such information is accessible via the left-side navigation. And it's easy for users to retrace their paths using the gray breadcrumbs at the top of the page.

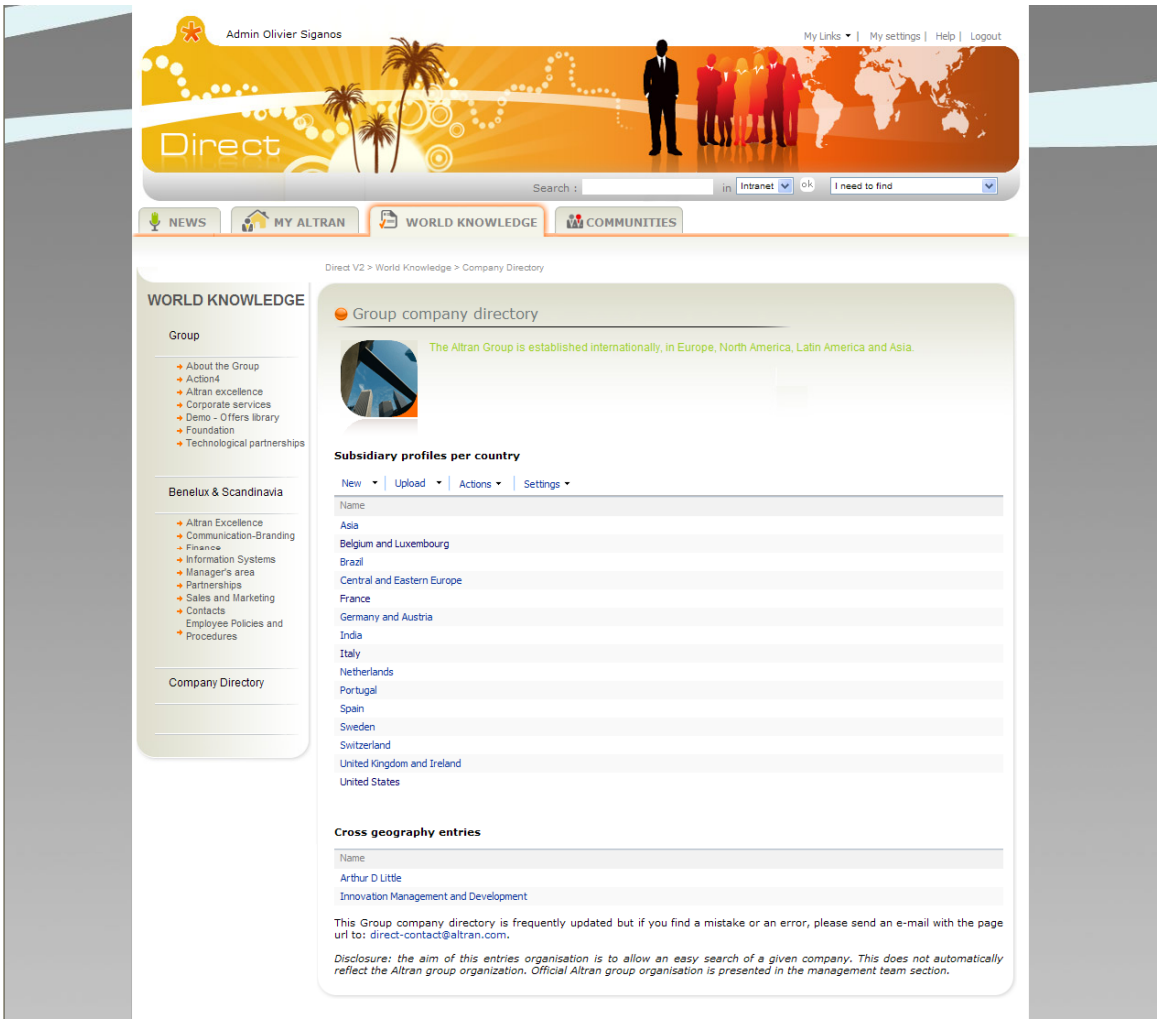
The *Employee Policies* and *Procedures* section houses official company information related to benefits and policies. Users can view this information by *All Documents* or by categories.

10 Best Intranets: Altran



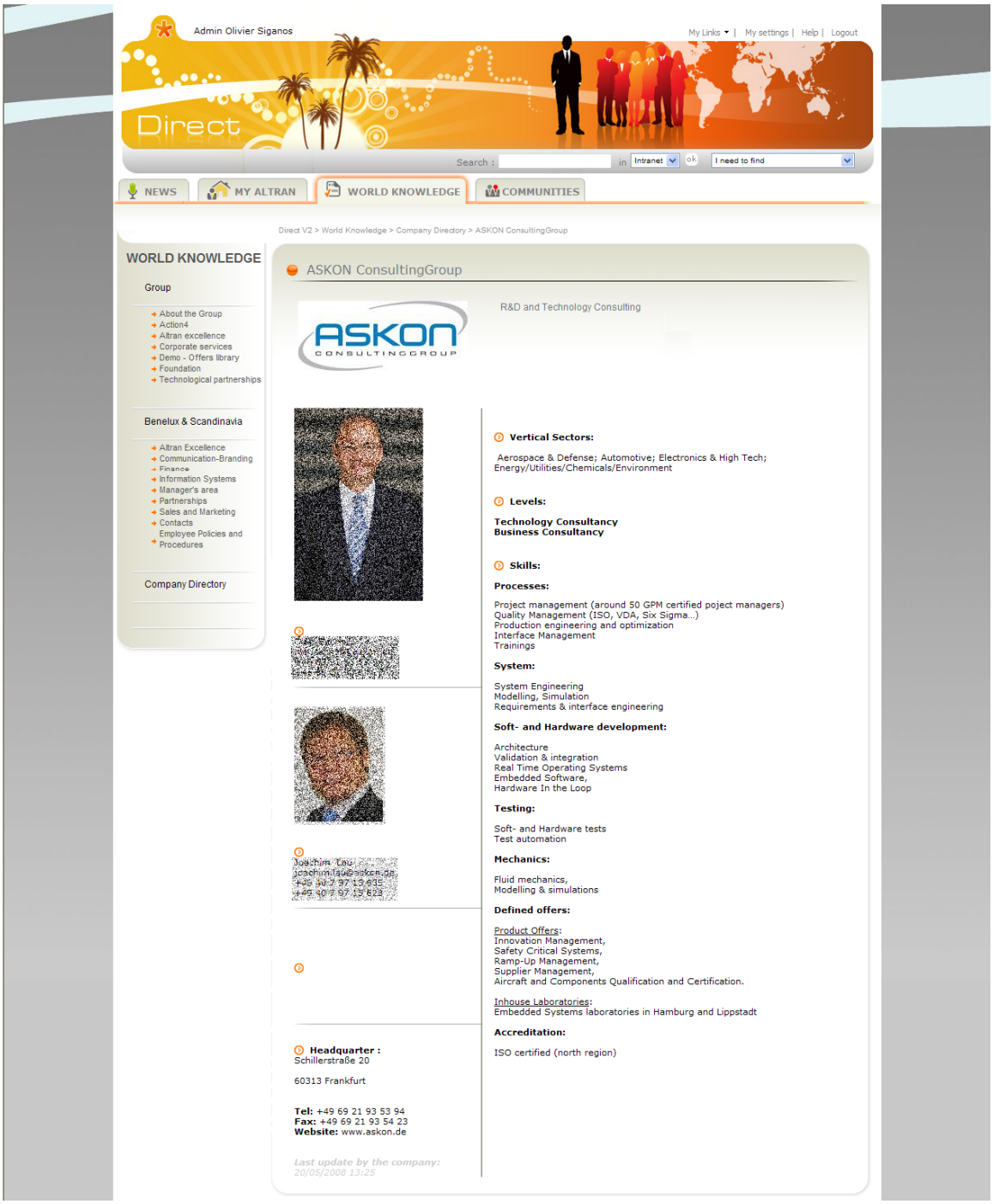
Pictured: Within the *World Knowledge* section, *Employee Policies and Procedures* houses official documents and information for the organization.

There are many Altran subsidiaries, and the intranet helps employees learn about the entire organization. The *Group company directory*—which is separate from the employee directory—helps users find information about the subsidiaries around the world.



Pictured: The *Group company directory* helps users find information about the organization's many subsidiaries around the world.

Clicking through, users can get more detailed information about the subsidiaries. These pages encapsulate much information, including names and contact information for the people in charge, contacts for the headquarters, and the vertical sectors the subsidiary is involved in, as well as its skills, services, and accreditations.



Pictured: Some of the detailed information users can find out about the organization's subsidiaries includes names and contact information for the people in charge, contacts for the headquarters, and the vertical sectors the subsidiary is involved in, as well as its skills, services, and accreditations.

The *Governance section* (under *About the Group* > *Management Team*) briefly explains the Altran group's governance and lists the members of the Executive Committee. Each member's name and title is listed next to a good professional photo.

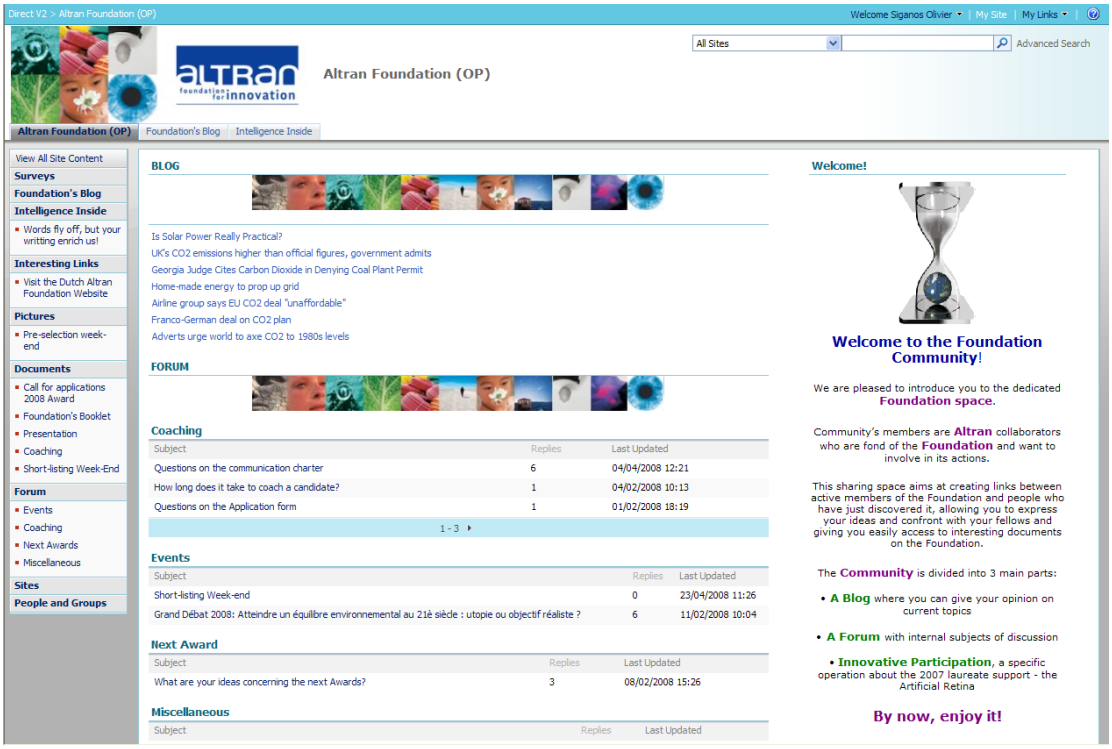


Pictured: The *Executive Committee* members are listed along with their titles and photographs.

The intranet's *Communities* section is the only section that deviates from the rest of the Direct intranet in look and feel.

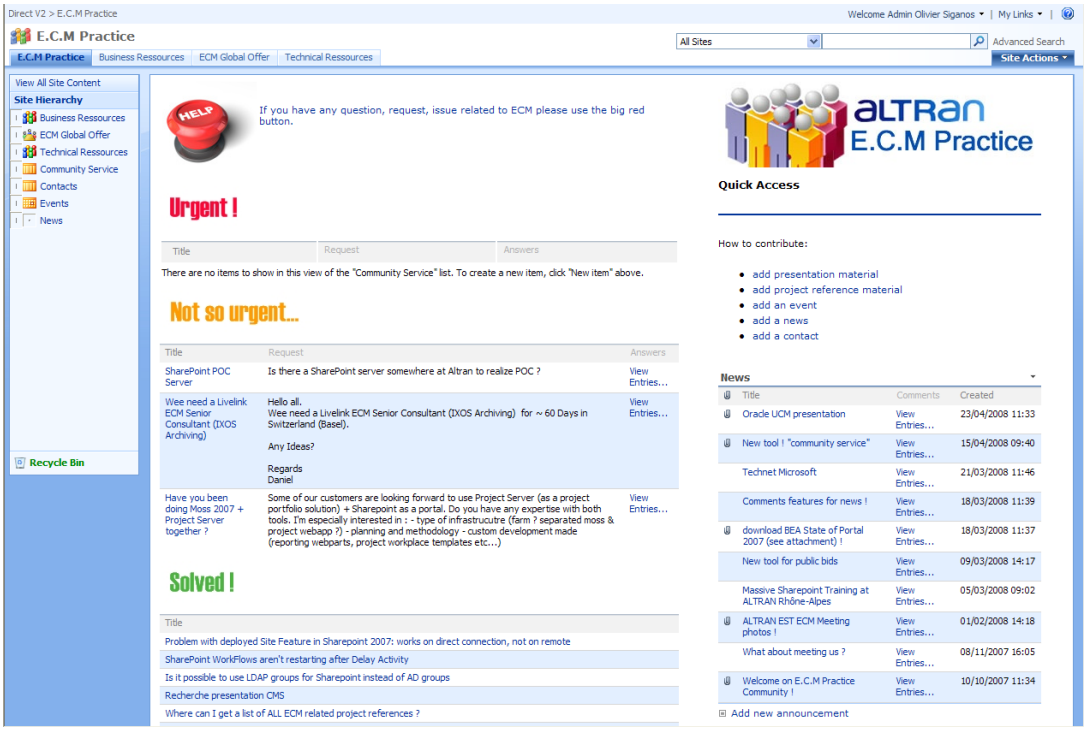
In this section, the team wanted to provide collaborative spaces to support transnational teamwork. Users can search for topics of interest and join an existing community or create a community of their own. Altran communities span a wide variety of topics and groups. For example, a community space for the Altran Foundation has information about the environment and related information. Parts of this and other communities, such as the ECM practice community, are open to everyone at Altran, while other areas offer access only to community members.

10 Best Intranets: Altran



Pictured: Parts of the Altran Foundation community are open, while some sections are for members only.

In the ECM practice community, people can ask for and give help. Requesters can mark items as *Urgent*, *Not so Urgent*, or *Solved.*



Pictured: Parts of the ECM practice community are open, while other sections are for members only.

The Altran intranet team made some disciplined decisions, trusting their task analysis and user research to direct them. Their intranet's four main tabs have been a great success, as has allowing communities to exist for collaboration and unique identity. Sometimes, having a small team—even one that works part-time on the intranet—is enough, as long as they have direction and drive. This group obviously did.

BACKGROUND

In 2005, the Altran group decided to move from a very decentralized group of 200 subsidiaries—each with its own brand, organization, intranet, and so on—to a new strategic, centralized organization. Today, the company has only 85 entities, and they're organized in a real network with a single intranet uniting them.

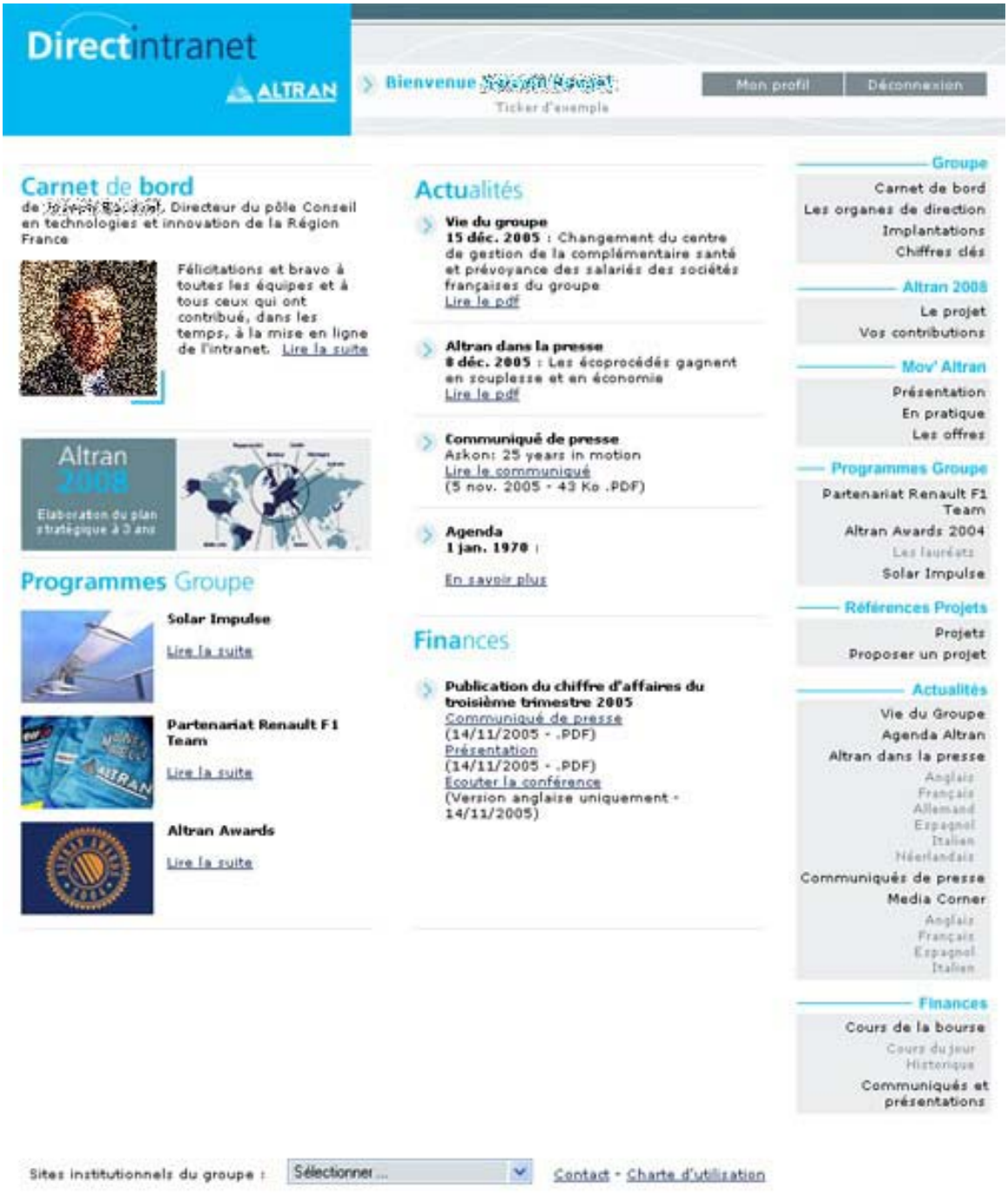
The very first version of the group intranet, Direct (v.0), went live in 2005. "This top down intranet was launched as the unique common media to address every single employee of the group and support change management," says Olivier Siganos, program manager. "We only had one month to design, manage content, and produce it."

Although the result of this initial effort was a very corporate, top-down intranet without a CMS, it was the beginning of an online group culture for the organization.

The site's next iteration (v.1) was launched in December 2005; it was based on Plone CMS technology and let the organization provide transactional applications and decentralized publication.

The current site (v.2) was launched in October 2007 with three major objectives:

- Provide local and national information (vs. global and corporate)
- Provide collaborative spaces
- Provide a framework that would eventually replace all local intranets



Pictured: The Direct v.0 homepage. This is how the intranet looked prior to the redesign; the original homepage is very similar to that of Direct v.1.

INTRANET TEAM

The Altran intranet team has four members. The project is a joint effort between the marketing/communications and IT teams and breaks down as follows.

Two people from the marketing/communications team provide:

- Management, governance, design, specifications, metrics, promotion, and support
- Editorial content, support for content managers

Two people from the IT team provide the development and technical support, including:

- A half-time project manager
- A full-time developer

Siganos says that launching the new intranet required organizational changes to support the new site. The first step of these changes was to launch an international network composed of marketing and communications managers.

"It was the best way for us to have their feedback in real time but also their support, even during the design phase," he says. "This network became the Direct country managers. We met by phone on a regular basis."

But this network was insufficient to reach all entities, so the team defined the role of local Direct manager—which is the same role as country manager, but on an entity level.

Finally, with decentralized publication, anyone who has been trained can publish information on the intranet. As a result, "we had to have 'content owners' who organized the work of their team around a section," says Siganos.

So, in the early project stages, the team set up the following reorganization, outlining various roles and responsibilities:

ALTRAN INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Corporate core team	• Provides governance, program management, coaching, support, and evaluation of Direct country managers • Is responsible for the content and features available on the group intranet level
Direct country managers	• Each is responsible for his or her own national intranet level, including: • Promotion • Content and features available on the country or local level • Training and support of the Direct local managers • Training and support of the content owners
Direct local managers	• Exactly the same role as the country manager, but at the subsidiary level
Content owners	• Responsible for the updates and consistency of their section • Delegates some part of the updates or changes to other members of the team/department



Pictured: The Direct v.2 team (from the left to right): Benjamin Rouard, Olivier Siganos, Jean-François Le Lezec, and Hervé Audouin.

Governance

The Altran intranet has benefitted from high-level management buy-in since its inception. Intranet governance has always been the marketing and communications department's responsibility and is under the supervision of Pascal Brier, vice president of the Altran Group. "This means we were able to convince the group's top management of the importance of a Direct redesign, and obtain the necessary funding for the redesign," says Siganos.

Marketing and communications has always been the central point for project management, design, and editorial strategy.

Outsourcing the Design

The new intranet needed a high-end graphical design that would bring it in line with the company's corporate identity. To help with this, Siganos and his team brought in design agency Tequila Rapido. Because the agency had worked on the company's public site, the intranet team knew it would know how to deal with the branding expectations for the new intranet.

Tequila Rapido continues to handle the intranet's ongoing graphical design work. Siganos says this is because Altran doesn't have in-house design expertise. "You can be wrong about a feature and correct it after the launch," he says, "but the general graphical look must really support the general design and be sufficiently appealing, especially if you are in a seduction phase with your users. This is one area where Tequila Rapido made a real difference."

The information design/architecture and editorial content is handled in-house, as is development and maintenance by the corporate teams. "We also do 'shared

development,'" says Siganos, explaining that doing so offers "a clear differentiation factor in the appropriation of the intranet by the subsidiaries in the group."

"The corporate team executes major new features, but others are done via the shared development program. This program allows a subsidiary to develop an entire new feature, under the sponsorship of the group, and then have it deployed on the intranet," says Brier.

As an example, Brier notes that Direct v.2 was technically designed and developed by the Altran ECM practice in Rhône-Alpes, France, while the new customer reference engine was designed and developed in Sweden and Belgium.

GOALS AND CONSTRAINTS

The Altran intranet's main goals are to:

- create a common group culture;
- support consultants and business managers by building a common knowledge base and content sharing (16,000 people across the company work onsite at client offices); and
- offer a single access to day-to-day applications

Because Altran is a three-tiered organization, the intranet has to support employees at all organizational levels:

- Corporate level
- Country level (about 20 countries or clusters of countries)
- Subsidiary level (there can be several subsidiaries per country)

The previous intranet offered only corporate information and services. To be closer to employees' needs, it was obvious that the new site had to offer information dedicated to a country (in its native language), as well as to a subsidiary.

The new design had to accomplish the following:

- Offer, in a single screen (the "one stop shopping" concept), group, national and subsidiary content and features such as:
  - local, national, and group news (internal or external);
  - local, national, and group services (such as time sheet, trainings, and travel booking, hosted in the intranet or by suppliers);
  - local, national, and group repository information (KM); and
  - collaborative spaces.
- Allow any subsidiary to migrate its former intranet to the "local" level of the architecture.
- Offer a logical and technical framework that facilitates the shared development concept.

Constraints

According to Siganos there were two main constraints in developing the Altran intranet's new release:

- **Budget:** To stay within the budget limits, Siganos says they focused much more on building a strong IA and foundations than on non-core features. The interface, for example, is available only in English or French—the company's two main languages—but national and local content can be written in any language.

- **Organization:** Because Altran has no full-time intranet staff, the team had to simplify everything. For example, says Siganos, they kept rules to a minimum and focused them on structure (10 golden rules for communities, 12 governance rules, and so on). "We built an organization and roles dedicated to the new version, from scratch," he says.

TIMELINE

The team completed the most recent intranet release in eight months. During that time, they redefined the IA; adopted a new CMS; organized, trained, and coached the Direct country managers on the governance rules; multiplied the site content by a factor of eight; added three major features; and re-deployed the intranet in 17 countries.

"Obviously, that is a lot of work to do in a short time frame," Siganos says. "It's feasible, but difficult." He recommends at least a year for this much work. "Your teams must be experts, and strong ones," he says. "If your management asks how much time it takes, ask at least one full year for a project of this type."

DIRECT V.2 PROJECT TIMELINE

Corporate Core Team	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept
Program management	X	X	X	X	X	X	X	X
Specifications	X	X						
Storyboard		X						
Governance rules[1]			X	X	X	X	X	X
Training design and content producers on community support[2]						X	X	X
Promotion kit design[3]							X	

Production Team	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept
Graphical design (Tequila Rapido)		X	X					
Technical design (Altran ECM practice in Rhône-Alpes)			X	X	X			
Technical development (Altran ECM practice in Rhône-Alpes)					X	X	X	X
Technical lead (IT team)	X	X	X	X	X	X	X	X

Direct Country Managers	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept
Briefings		X	X	X	X	X	X	X
National-level design					X			

Training						X		
National-level production							X	X
Content manager training								X
Local promotion								X
Content Managers	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sept**
Trainings							X	X
Content migration (from the previous intranet) or production							X	X
End-User Milestones	**Feb**	**Mar**	**Apr**	**May**	**Jun**	**Jul**	**Aug**	**Sept**
Announcement of the new version (V2)						X		
Inside Direct V2 blog						X	X	X
Beta testing phase (100 users)							X	X
Launch promotion								X

*1. **Governance rules:**

The previous intranet version had no governance. For release v.2, the team set up 12 very general rules to guide the intranet approach and protect it against major deviations on consistency.

*2. **Training design and content producers on community support**:

The team developed two types of training:

- "Summer Camp." A two-day train-the-trainer session for Direct country managers covering three main topics: Web 2.0 culture, metrics, and technical skills.
- Training for content managers. This training consisted initially of a three-hour session covering the basic skills needed to create and maintain a section. This three-hour introduction was supplemented with one-on-one training to address specific needs.

Also, both of these groups get ongoing support through a dedicated community.

*3. **Promotion kit design**:

The team designed a promotion kit to facilitate local promotion of the intranet. The kit was composed of the following:

- The ideal planning for a promotion campaign (milestones included announcement, teasing, and launch)
- A two-minute Flash movie that presents the intranet (suitable for any employee)

- A brief slideshow (five slides) that presents the intranet to decision makers
- Giant posters, flyers, and brochures

USERS

Altran intranet users have the following roles across the organization: consultants, business managers, support personnel, and executives. The intranet doesn't generally restrict access according to an employee's job function; consultants can access the same content as managers. However, it does grant access rights based on geographic criteria.

USER TASKS

"Our intranet has a task-oriented architecture," says Siganos. His team identified four basic needs in breaking down the user tasks—"What's new?" "What service can I use?" "I want to know…," and "I need to share and collaborate"—and mapped these expectations to four channels:

1. ***News*:** Allow users to read internal news at the group, national, or local levels.
2. ***My Altran*:** Give users access to a one-stop shop of day-to-day services available both through the intranet (such as timesheets, expense reports, and travel booking) and on the site itself (such as online training, internal mobility service, and HR forms).
3. ***World Knowledge* (and know-how), including:**
   - Facts and figures: Information on each group, national, or local department (including organization charts, road maps, libraries, and templates).
   - Access to business-critical knowledge such as project references, business solutions, partnerships, and project or commercial templates.
4. ***Communities* (collaboration), including the ability to:**
   - Search and join communities related to particular interests
   - Collaborate in those communities
   - Create a community
   - Independently create and manage a community architecture

Accomplishing the above tasks was an important step for the organization. "Realizing the possibility of having, on the same screen, the three levels of our organization was a clear message to our employees: 'We are a group!'" says Siganos. "This is when information architecture is a message."

At the country level, the four-channel architecture provides a very important advantage. The task-oriented architecture is independent of the current or future organization between the different departments. "This insures a very consistent navigation for end users," says Siganos. "The access to information and services is exactly the same at group, national level, or local level."

"When we designed this architecture, we thought this was perfect for our group," he says. "After a year now, we still think it's good—and the user feedback confirms that." At the country level, though, content owners sometimes still have real difficulties and, according to Siganos, "they slip their content into several channels."

Siganos explains that most content owners think about information in a very organization-oriented manner—focusing on their own organization. "For example," he

says, "the human resources department wants a *single* section called 'HR.'" In that section, says Siganos, the HR department wants:

- HR department news;
- services provided to employees (such as holidays reports, timesheet, and expense reports);
- an outline of the department's organization, along with fact and figures; and
- a collaborative space for the department.

"But, on the contrary," says Siganos, "on our intranet—which is task-oriented—the content listed above will be split into four channels." That split occurs as follows:

CONTENT CHANNEL DISTRIBUTION	
CHANNEL	**CONTENT**
News	HR department news will be published under the *HR* tag in the common news list
My Altran	A section for each employee service, categorized by need (training, travel, work remote, and so on)
World Knowledge	The department's organization, facts, and figures
Communities	Collaborative spaces

Siganos says that once he explains the system to content owners, they typically rethink their own experiences as users, and thereby understand the system very well. "We also provide a PowerPoint slide with multiple choices that helps the content owner determine in which channel the content must go," he says.

Planning for the Future

Etienne Gonnaud, ECM practice leader, says they planned the IA for both existing information (things they knew how to structure) and future information (things they couldn't anticipate). "Technically, this means that not only the content could be easily changed by 'end-users' but also the structure" including rights, navigation, and hierarchy, says Gonnaud. "As a consequence, we are using both templated and user-defined content."

DESIGN PROCESS AND USABILITY ACTIVITIES

Siganos says the site's previous versions had been rushed and were not satisfactory. "However, Direct had proved its importance," he says. Half of the group had adopted it, despite the fact it was not mandatory. "And so the time was right for a redesign which would allow us to build upon this basis.

"Direct v.2 was a response to our willingness to break new barriers in terms of common culture and audience, but also to integrate collaborative tools at a transnational level," says Siganos. "The v.2 was a really better response to the 2005-2008 strategic plan of the company compared to the v.0 or the v.1."

Monitoring Changes

Decisions about what to change were fueled by monthly traffic reports, which the team studied very closely. The team also defined a few key indicators and put together a scorecard to monitor each change.

And, every six months since launch, the team has conducted user satisfaction surveys. During the most recent survey, conducted during the summer of 2008, 10% of those surveyed responded.

"Most of the time, we take the oral feedback as a lead; we then verify with the traffic measures. For instance, we were very surprised that a lot of people had not yet discovered a lot of very nice features," says Siganos. "We decided then to launch a little program of video tips and tricks."

Tracking Monthly Indicators

The team chose three ratios as monthly key indicators:

- **Activated accounts:** The number of people, out of the total number of employees, who have visited the site at least once.
- **Monthly use:** The number of people, out of the total number of activated accounts, who use the site at least once during each month.
- **Visits:** The total number of visits relative to the number of active accounts.

These figures are detailed by country and sent to intranet teams and to the top management of each country. "This is the best way to show progress, of course," says Siganos, "but also to ensure the awareness of the management on the intranet impact."

These metrics let the team track the impact of local and global changes in terms of use—though not, of course, in terms of usability. "For usability," says Siganos, "we measure through funnels ratios such as people logged in versus people retrieving passwords, retrieving password success" and so on.

Focusing on Fundamentals

The Altran intranet team didn't conduct extensive usability activities in bringing v.2 to fruition; instead they focused their efforts on fundamentals.

"I would say that during the last year, we have focused much more on fixing the fundamentals of the group intranet culture for employees," says Siganos, adding that the coming year "will now be the time to slow down and improve each piece of the global framework through 'real' usability studies" and to build upon the basics they have in place. That said, the team did use two methods to involve users in their development process: surveys and prototype testing.

User Satisfaction Surveys

The user satisfaction survey is an anonymous survey conducted and promoted on the intranet and via follow-up e-mails. The team tested two versions during the past few years:

- A long survey available for one month
- A series of short surveys available for two months

"The second method has a lot of advantages," says Siganos, including that:

- Responding to a short survey requires less than a minute of a user's time, making it easier to promote.
- Subsequent surveys can be adapted based on a user's response to a previous survey. For example, they might delve deeper on a particular question or issue.

- Ultimately, it lets you collect much more information than if you offer only one "big" survey.

User Testing of New Design Prototypes

During the storyboarding phase, the team conducted user testing on the new design prototypes. Siganos explains the methodology: "Every important/key screen is designed on PowerPoint (mainly black and white forms and essential text). We picked the users and ask them to perform tasks."

What the team did here was key. They actually put prototype pages in front of people. They didn't ask what they thought or have them give a critique. They actually gave them tasks to complete and observed. This is a fabulous way to test the usability of new design ideas.

"We proceeded incrementally," says Siganos. "Each time a user made a comment, had difficulty proceeding to the next task, or did not understand the 'response'—the screen following his action—we reviewed the storyboard."

Basically, the designers were not trying to validate the design or get the users to "do it right" or like it. They truly wanted to learn about what worked and what did not work for real users.

URL AND ACCESS

The intranet's URL is direct.altran.com. Remote access is not a problem; 70% of the Altran workforce accesses Direct from customer offices or from home.

The site is set as every user's default start-up page, but they're allowed to change it. "If they decide to change it, it's our [the intranet team's] problem, not theirs," says Siganos. "This means we have to be better."

TECHNOLOGY

Design Tools

Microsoft Office SharePoint Designer 2007

Tools for Building

- Windows SharePoint Services 3.0
- Microsoft Office SharePoint Server MOSS 2007 Standard
- Visual Studio 2005 (Framework 3.0, Visual Studio 2005 Extensions for Windows SharePoint Services, Visual Studio 2005 Extensions for Windows Workflow Foundation)

System Information

Three servers (two front and one index):

- Windows Server 2003 R2 Enterprise and Service Pack 2
- MOSS 2007 Standard
- Web Server: IIS 6.0
- Framework .Net 3.0 RTM
- Processors: Bi-pro 2.2 GHz
- Memory: 4 GB RAM

Two SQL servers with a cluster (250Go) of storage space:

- Windows Server 2003 R2 Enterprise and Service Pack 2
- SQL Server 2005
- Processors: Bi-pro 2.8 GHz
- Memory: 4 GB RAM

Bug Tracking / QA Software

- Event Viewer (provided by Windows 2003)
- IIS log files
- Log Parser
- ISILOG (Bug tracking application)

SEARCH

The site uses the standard search engine provided by SharePoint. "We are improving the search results step by step," says Siganos. "We have not reached the limits of the search engine."

Search Technology

- SharePoint Shared Search Provider (SSP) (provided by Microsoft Windows SharePoint Services (WSS))
- Microsoft Live

Siganos says they regularly track the top search keywords. "This obviously helps us to understand what people are looking for and decide if it's an accessibility issue to solve, a topic to promote, or a legit search."

CONTENT MANAGEMENT

The site's CMS is SharePoint 2007. On top of this solution, the team developed a custom layout and a toolbox composed of several content type templates (including lists, libraries, and sites) for the content managers.

The content owner who owns the specific content in "real life" is also the content owner on the intranet. This means that employees who are responsible for subject areas in the organization are also in charge of the corresponding section on Direct.

"We promote the idea that using the intranet back office is just a new step on the democratization of the communications tool," says Siganos, adding that it's similar to how word processing introduced "a change of paradigm in the manager/assistant organization."

Adding a New Content Type

When content owners want to add a new type of content to the intranet, they engage in a defined process with the Direct country/local manager as follows:

- Identify goal
- Develop map of content definition
- The Direct country or local manager trains the content owner on the rules, guidelines, and so on
- Together, the content owner and manager create the new section
- Check before going live (at the corporate level, with the core team intranet, if needed)

Content owners can update or make minor evolutions autonomously, without feedback from the Direct country/local manager.

Enforcing Standards

Enforcing standards is not hard to do. "The system does most of the work," says Siganos. With the content templates, part of each page (navigation, background, and so on) is automatically created and content owners can't change it, so it's difficult for them to create something completely unusable or inconsistent. Still, the team provides tools and conducts a quality check of each section during the design phase and before it goes live.

Design Standards

The Altran intranet team has established support communities on the site where content managers can find information about the site's rules and structure and get answers from their co-workers.

These communities include:

- One for content managers containing information about architecture and graphics rules and technical how-to's (in text, PowerPoint, or video format), as well as message boards, discussion boards, and so on.
- One for local or country managers containing promotional material, training material, meeting minutes, PowerPoint templates, technical templates, and so on.

Both communities have two objectives:

- Facilitate exchange and support.
- Familiarize the Direct managers and contributors with how to work with collaborative tools as much as possible.

MOBILE

"Direct is accessible from mobile devices, but we have not optimized or created mobile-dedicated content," says Siganos. "There is no real demand to make the intranet compatible with mobile devices."

Siganos says that the alerts features, which are e-mail based, are enough for mobile users' needs. "They know what's going through the mobile mail, and then connect on a standard device to access the intranet."

FEATURES

Collaboration Tools

The site takes advantage of the native SharePoint community features, but the intranet team has also implemented some original rules and concepts for collaboration. Anyone within the group can create a community, as long as he follows 10 golden rules:

1. **Agree to the rules:** As the owner of a community, you automatically agree to all the rules stated below.
2. **Only professional communities:** Only communities with a professional goal and a sense of sharing are allowed.

3. **Approval required:** Creation of a community is by request only. Approval from your Direct country manager is mandatory for creating a community.
4. **Must be sponsored:** Each community is required to have at least one owner and one sponsor. Two owners are advised. Sponsor and owners are responsible for the respect in their community of all rules contained therein and in general use elsewhere in the group.
5. **Minimum three members:** A community must have at least three members, as soon as it is created.
6. **Maximum 500 members:** The size-limit for a community is 500 (except for official communities at the group level).
7. **No classified information:** Classified information entrusted to us by our clients cannot be made available in any community.
8. **Communities expire:** As soon as a community has reached its goal, the owner is committed to erasing it.
9. **Monitor inactivity:** If it remains inactive for more than three months, a community will be erased once its owner has received three e-mail alerts.
10. **All rules subject to change:** The creation and management rules for the communities may be subject to changes.

Altran employees can choose between three types of communities:

- **Open community (O):** Anyone can join this community and take part in its activities. The owners organize the content and contribution rules.
- **Private community (P):** Access is restricted to members. The owners organize content and contribution rules. To join such a community, an employee must either be invited or make a request to its owners.
- **Open/Private community (OP)**: A mix of both types. Part of it is open to anyone interested in the topic, while the rest is members only. This is the ideal community.

"This model is very appreciated in the group and the number of communities has grown very fast," says Siganos. He also notes that communities require local promotion and flourish best when local management has shown an interest in them.

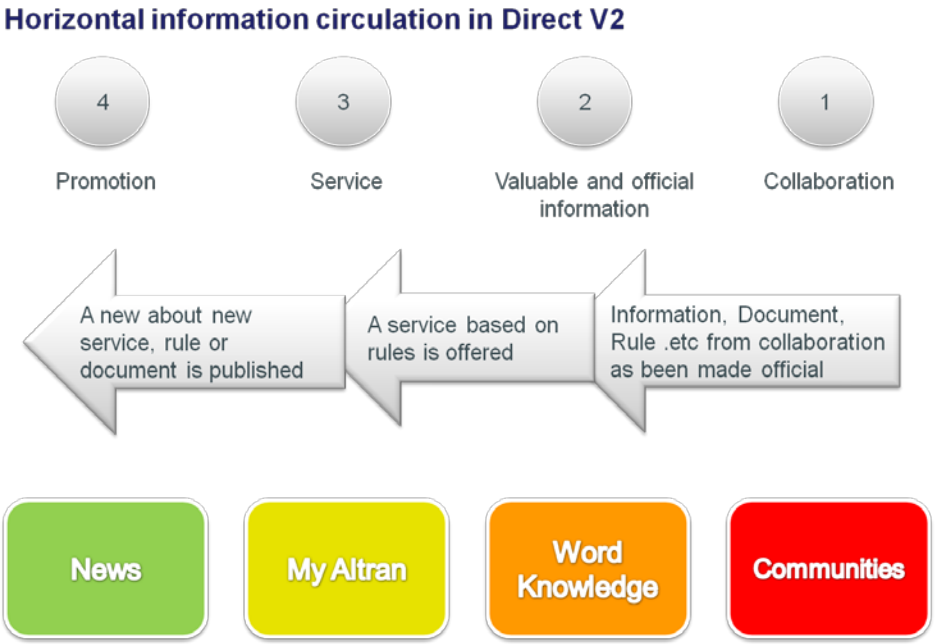
Knowledge Management

Knowledge management comes in two flavors on the Altran intranet. The *World Knowledge* channel offers users validated and structured information. This knowledge has as been collected from the communities (and other places) and has been reviewed, validated, organized, and so on by the appropriate people within the group.

The other type of knowledge management is more lightweight and is derived from within the communities, where members share a lot of informal information. "The collaborative communities are not controlled, except by the 10 rules," says Siganos. "It's a bit like the Internet: It's very easy to publish and share information [but] you are not obliged to trust the information." Basically, he says, it's a "one-to-one trust" and users must decide for themselves what is valid.

Siganos says the organization has also formalized pathways where they can promote the transition between informal and formal knowledge across the organization. "For instance," says Siganos, "a new business offer around aerospace is elaborated on in a community. Then, when it's time to evaluate new offers in the group, we set up another community that supports the evaluation of the maturity of each new offer in an official but collaborative way. When the evaluation is over, the result of the audit—as well as the granted offers—become official in the *World Knowledge* section. The promotion of this new audit is made in the news channel."

How this knowledge transfer works is illustrated here (following the chart from right to left.)



Pictured: How information transitions from informal to formal knowledge within the organization.

LESSONS LEARNED

Key team members describe some of the lessons learned in developing the Altran intranet.

Olivier Siganos, program manager:

- **Know your users.** "The more you know what's really important to your users and what's not, the better you can focus on features that count (and save your budget). The better your technical advisors are, the easier it is to understand the concepts at work in the CMS. Then you are able to provide better specifications, saving precious days of development."
- **The intranet has its own life.** "'Communicate early and often to end users' is a rule we try to respect. The development planning is public, and a new feature or major improvement is released every two months. Communication really pays off in terms of user confidence in their day-to-day tools."

Hervé Audouin, electronic content specialist:

- **Regularity is the key. "**Managing an intranet is like a marathon. You have to be constant (publishing new services and maintaining your intranet regularly, etc.) to produce results. No need to do a strong and temporarily action if the day-to-day job is not done. You will lose the benefit of both."
- **Listen to the users and take action. "**One single opinion is always interesting. The same comment expressed twice should be concretized as soon as possible. Never forget that many users may think the same but remain silent. Do regular surveys, too."

RESULTS / ROI

Like many companies with a successful intranet, Altran doesn't have hard numbers to prove the site's success, at least not yet. "The perceived ROI is amazing," says Siganos. "But we are only at the beginning of this journey."

Without hard numbers, companies can measure ROI by the tasks users can accomplish now that they couldn't prior to the intranet.

At Altran, one of the new site's first real metrics was an increase in the number of people who connected to the intranet at least once per month (compared to v.1). This figure rose 60% with the new site.

Advanced Micro Devices (AMD)

Using the intranet
AMD creates silicon-based processing platforms based on x86, graphics, and video processing expertise. AMD is focused on best meeting the needs of consumers, and leading computing, wireless, and consumer electronics companies to help them deliver high-performance, energy-efficient, and visually realistic computing and graphics solutions.

Headquarters: Sunnyvale, California

Number of employees the intranet supports: Approximately 16,500

Company locations: The US, Canada, Germany, The UK, China, Japan, Korea, Singapore, Brazil, and many more.

Annual sales: $6.013 billion in 2007.

Design team
Six in-house employees formed the core design team, working with 40 departments in North America. Catapult Systems provided development support for the design.

Members
In-house: Nils Ellis, art direction/graphic designer; Andrea Werzner, program manager; Dana Baldwin, project manager; Renee Irion, Web analyst; Deborah Nations, project owner; Dave Kroll, project owner.

Catapult Systems: Richard Calderon, senior lead consultant; Robert Nellis, senior consultant.

SUMMARY

AMD's intranet is testament to the fact that anything can be done in a short time if you have the right team in place and the team is very driven. When building the organization's intranet, AMD Central, time was not on this determined team's side, but it was still able to achieve huge gains in its redesign.

The company established the original intranet seven years prior as a means for sharing information among departments and teams. But when AMD acquired ATI, the team had to merge the relevant content for both companies, and they had to do it fast. Completing a project of this scope in six months seemed unlikely, if not nearly impossible. Also, the team was relatively small, with just three full-time intranet employees, plus a group of part-time graphic designers, content managers, and developers, and an outside agency. Ultimately, however, the designers not only met the schedule (at the expense of their free time and probably many pots of coffee), but they took things two giant steps beyond. The first step was the effort to further unify the two organizations and provide an online environment that supported collaboration. The second was to improve productivity by offering easy-to-use tools and information. These goals impressed the organization's top management and brought the team some very good support.

AMD Central's big additions include enhanced community tools, such as blogs, forums, calendars, and timely news. These have helped communication among managers, teams, and everyone else. The tools have also proven especially supportive for the newly merged organizations.

Sharing Ideas

The intranet's forums and blogs let leaders communicate to employees in a timely and informal manner and offer interesting, motivating information on everything from project updates to philanthropic efforts.

As the blog below shows, features such as these can inform employees and even take them to another world. In this example, a VP is sharing with employees his experiences in implementing a program to benefit people in South America. The

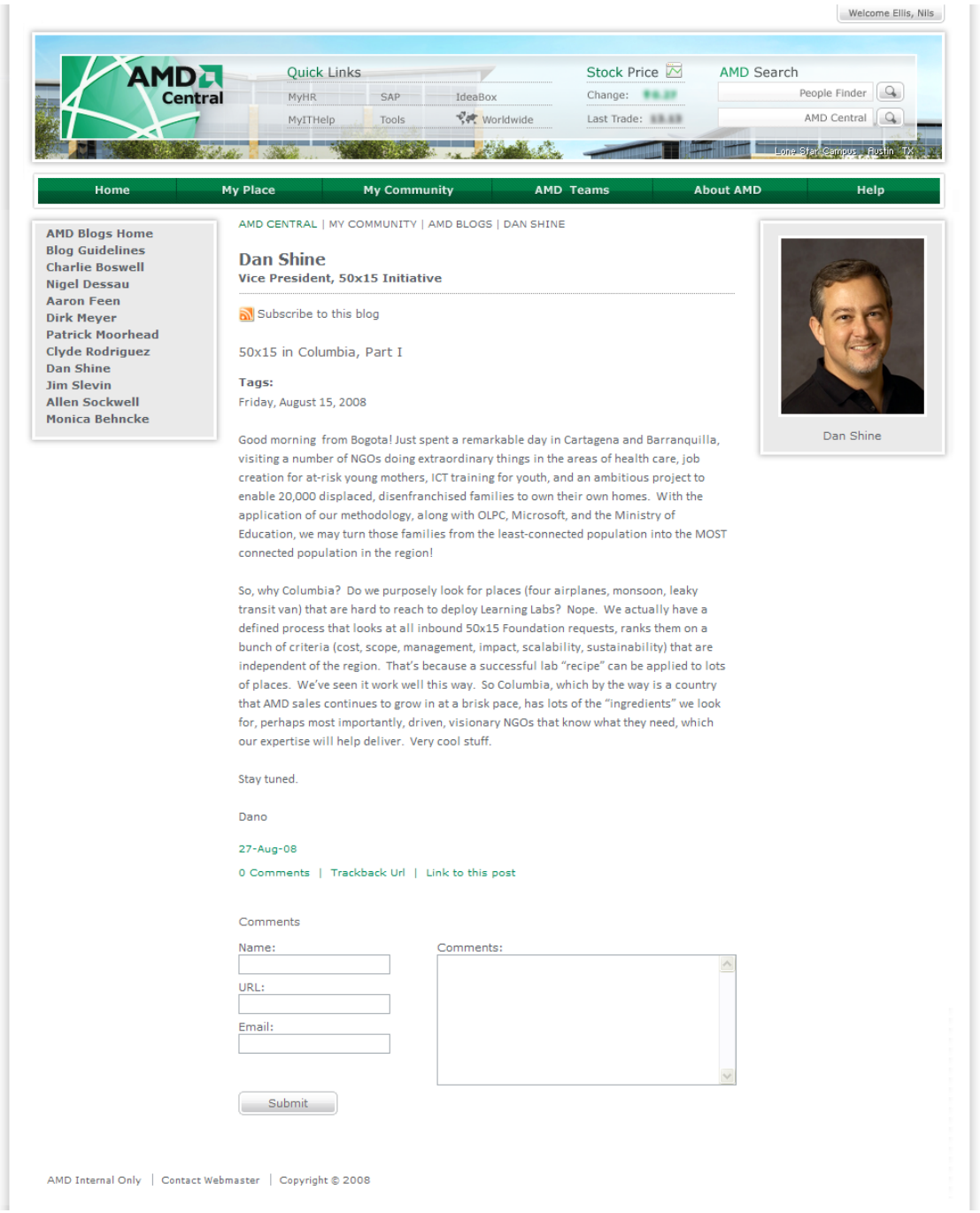
personal writing style gives the sense that this VP is approachable and interested in telling his story. Plus, a good picture of him makes the page more personal, too.

Blogs are located in the intranet's *Community* section. Each blog is identified by the leader's name, which appears as a link in the left-side navigation.

After each post, employees are encouraged to offer comments and read those of other people, promoting community.

Having leaders and employees take a moment to communicate in this way might not seem like such an important thing. But it is. This online sharing and responding can go a long way in building a community, especially in cases when organizations have just merged. It's not just that this is a *blog.* You can achieve the same effect in a forum, through letters, notes, and responses. Any opportunity to help people share experiences and ideas is positive.

10 Best Intranets: Advanced Micro Devices (AMD)



Pictured: A blog from one of AMD's leaders gives interesting, motivational information about a philanthropic effort: A "Learning Lab" the organization is setting up in Columbia. Employees can easily write comments about the post and read those of other contributors.

Calendars are invaluable, especially for large teams and those that are geographically distributed. On the AMD intranet, designers created a simple calendar interface that is used across departments to track and communicate events and milestones. The calendar lets employees read about and sign up for the listed events.

The calendar's aesthetic makes it possible to view a good number of words in each entry—not just something useless, like *Meeting*, which is all that many of today's intranet calendars display. Even in the six-month view, the left-side categories let people further refine the entries to create a more thorough picture.

In addition to project calendars, a corporate calendar displays key corporate events for employees.



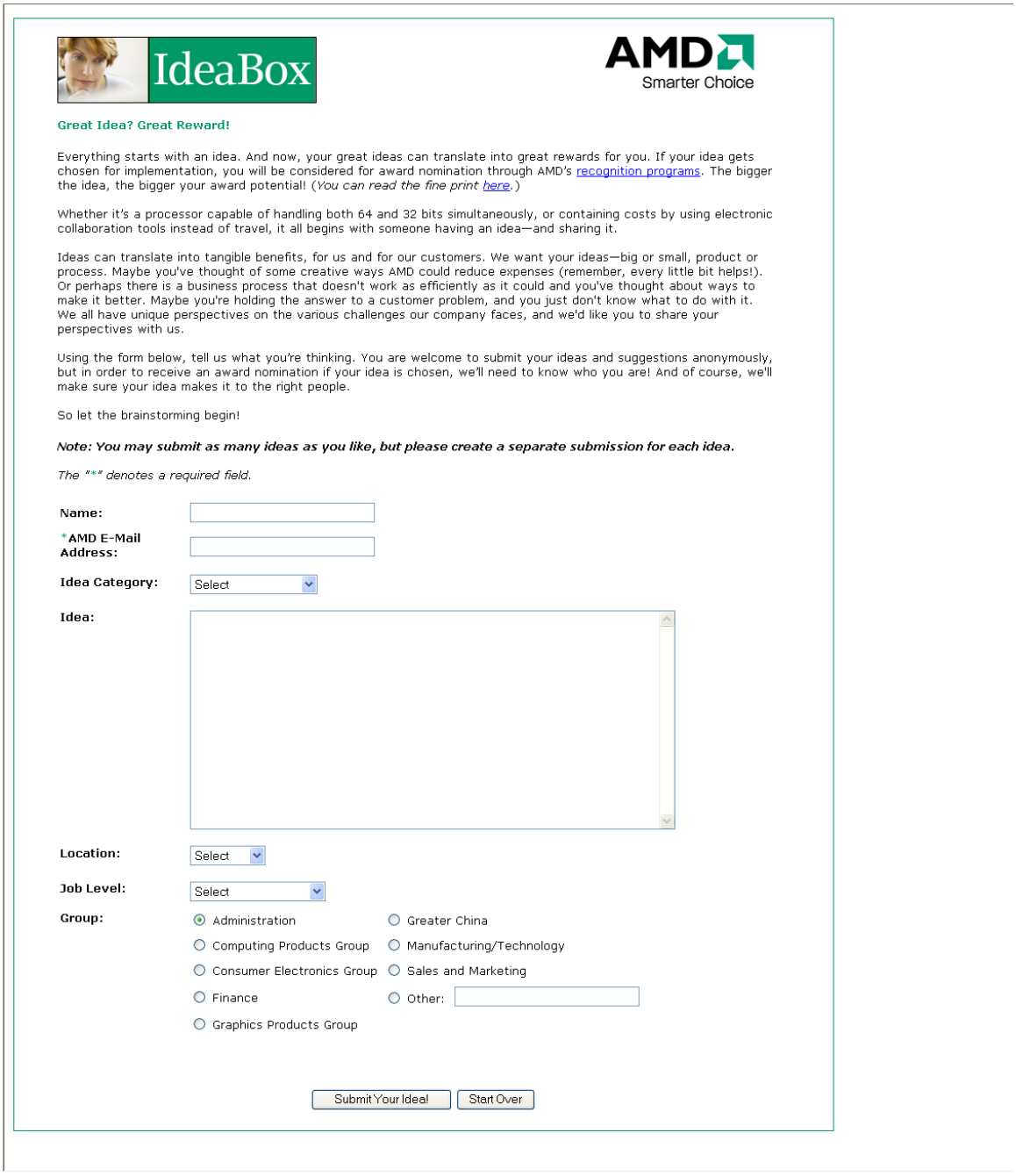
Pictured: The calendar can be viewed in several different ways. The aesthetics and typeface let users see a lot at a glance without having to open specific entries.

In addition to blogs, forums, and calendars, AMD Central also offers the virtual *Idea Box*. Yes, the suggestion box has shed its rectangular wooden form and found its

way to the electronic world. AMD's virtual *Idea Box* lets employees submit ideas of any type without worrying about being identified or embarrassed. On the front end, users see a simple form to submit their ideas; they can leave their name blank or fill it in. They can also choose categories for their ideas, then type them up in a simple open field.

On the backend, designers set up a workflow that distributes the ideas to the appropriate business leaders. These leaders consider the ideas and respond to each submitter with a thank you and, if necessary, any further steps or information. Ideas deemed to be helpful are selected, showcased, and implemented. The organization typically generates a news story about key ideas as well, and the people who submit them are considered for recognition. This is just one more opportunity the intranet affords AMD employees to feel like they're part of the process, rather than a tiny cog lost in the workings.

10 Best Intranets: Advanced Micro Devices (AMD)



Pictured: The virtual *Idea Box* lets AMD employees easily make suggestions. On the backend, ideas are routed to appropriate leaders who decide how the idea might help the organization.

Another way the intranet makes all employees feel included at the organization is to offer international versions with the same content as the headquarters' "main" intranet. The intranets for Asia, Germany, and the US started out quite different; one of the designers' goals for the redesign was to make them all alike.

Employee Profile Pages

The employee profile pages, or *PeopleFinder*, go way past the old days of name, rank, and serial number. A combination of organization and user-generated information paints a vivid picture of the selected person. Based in MS SharePoint, the feature also allows people to access and edit (their own) contact information.

The person's name appears in large bold letters at the top of the page. Next, the page shows a job title and contact information, plus a picture of the person to add that human touch.

Knowing that job titles at most organizations aren't always very informative, designers created a field for the employee's *Role.* This is where people can more thoroughly describe their job and responsibilities.

The *Projects* section might be the most valuable one for profile readers: It describes the person's past and current work projects, and is thus sometimes even more tangible than the *Role* area.

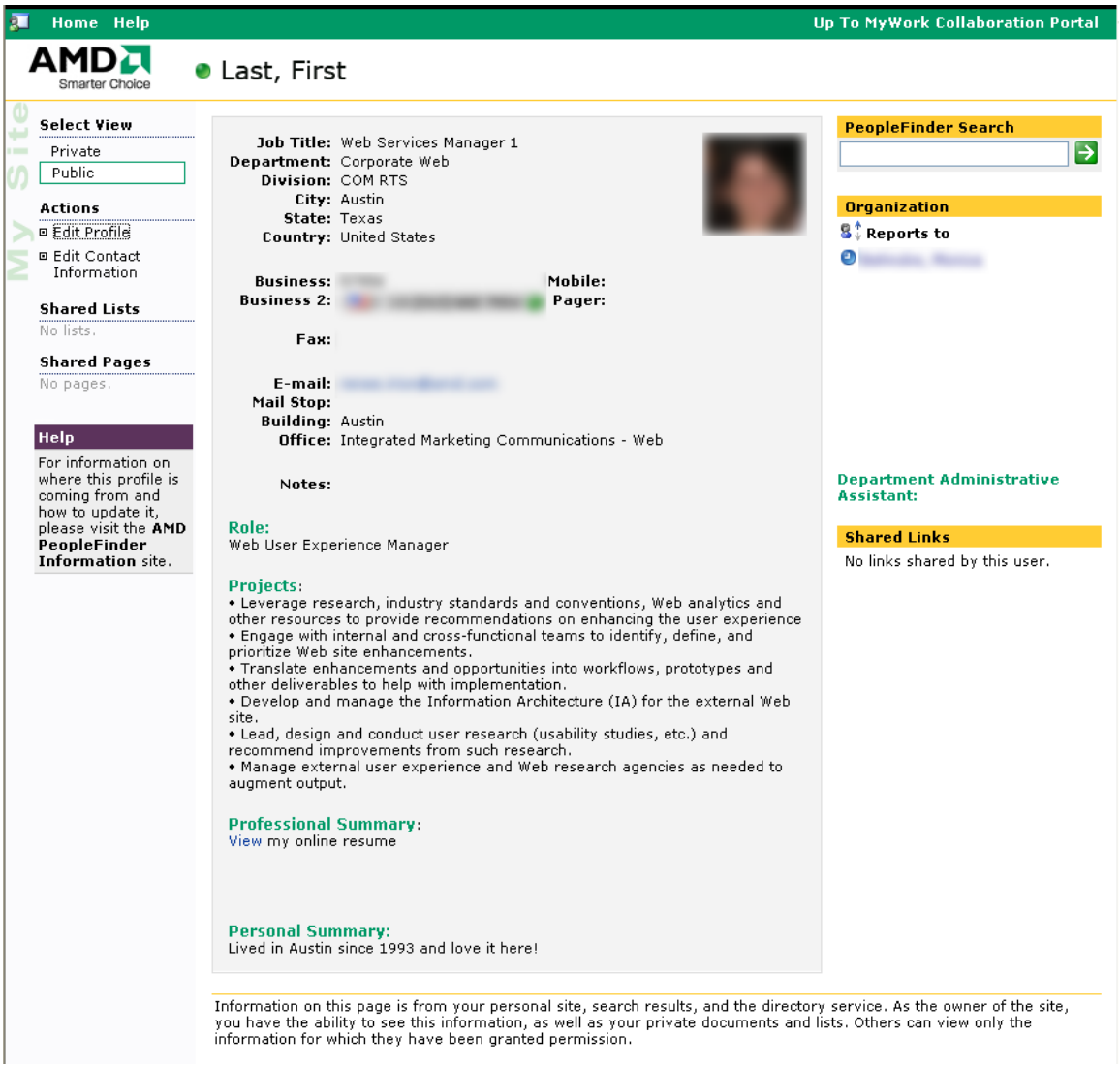
Ever wonder what your colleagues did before they came to your organization? At AMD, you can get a sense of this from their profile, as users also provide information about their professional background.

Finally, all work and no play… well, you know the rest. Discovering personal facts about colleagues can bridge gaps, foster relationships, or—at very least—help you think of an icebreaker when you first meet someone. Users add their own notes to this personal section and control which personal facts are disclosed. Users can also share photos and favorite links with other employees.

If you're the employee and want to update your own profile, it's easy to do. When info is provided on the backend, it can be a wild goose chase for employees to figure out whom to talk to get information changed. But not on this intranet. The designers considered this scenario, and eliminated the need for users to hunt or guess. Instead, they can easily find the source via the *AMD People Finder Information* link, which appears in the left-side navigation. And, if users want to add their own content, they can click the *Edit Profile* or *Edit Contact Information* links on the left.

To see where a person fits into the overall organization, users can simply look right to the pertinent part of the organization chart.

10 Best Intranets: Advanced Micro Devices (AMD)



Pictured: The employee profile pages offer a combination of information provided from backend databases and from the profiled user. Employees can edit their employee profile pages, as well as find the source of information provided by the backend.

Productivity Enhancements

With a small team and only six months to work with, the team had to be very disciplined in deciding which features to add. One feature the team decided would be very helpful is *My Place.*

The *My Place* feature lets users add and edit their own links in one of the intranet's top-level, horizontal navigation. They do this through *edit My Links*, the last command in the menu. The link gives them direct access to their list to add and remove items as they wish.

With this feature, people can pick and choose what's important to them and quickly and easily find the pages on the intranet.



Pictured: The *My Place* feature allows users to add and edit links in one of the top-level, horizontal navigation categories.

Another productivity enhancement comes, of course, from using common templates and a consistent style across the design. (When the style is the same across the intranet, employees don't have to relearn where types of commands are located and other design idiosyncrasies.) The intranet team derived usable page templates that let employees create pages and enter content. The page types were added to the template library and include department pages, campaign pages, news pages, and events pages.

But this undertaking did not come quickly; to make the templates and styles concise and consistent, the team spent "a lot of time" with their Microsoft vendor—roughly two months during the six-month project lifecycle—hashing out the best templates for the MOSS platform.

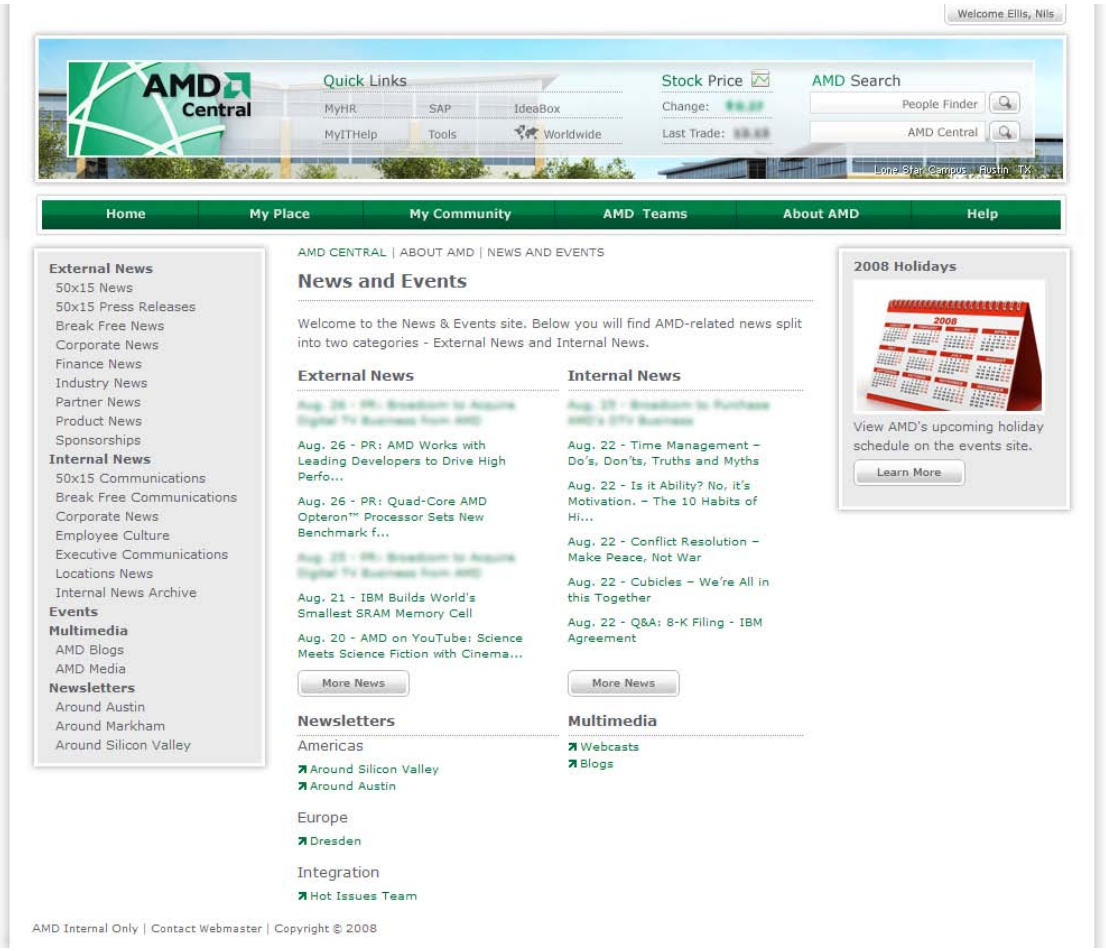
The intranet team's governance choice was to allow the respective site owners to choose which templates their content managers could use.

Being designers, and thus prone to predicting next steps, the team knew that templates alone wouldn't be enough. They therefore created template guidelines to ensure that employees would use the templates correctly and to their fullest advantage. They distributed these guidelines to site owners.

The global navigation across the top of pages remains the same across the intranet, with choices for: *Home*, *My Place*, *My Community*, *AMD Teams*, *About AMD*, and *Help.* While this is the more prominent navigation, another, less prominent menu appears in the banner area, so features such as *Search* and *People Finder* are always available.

10 Best Intranets: Advanced Micro Devices (AMD)

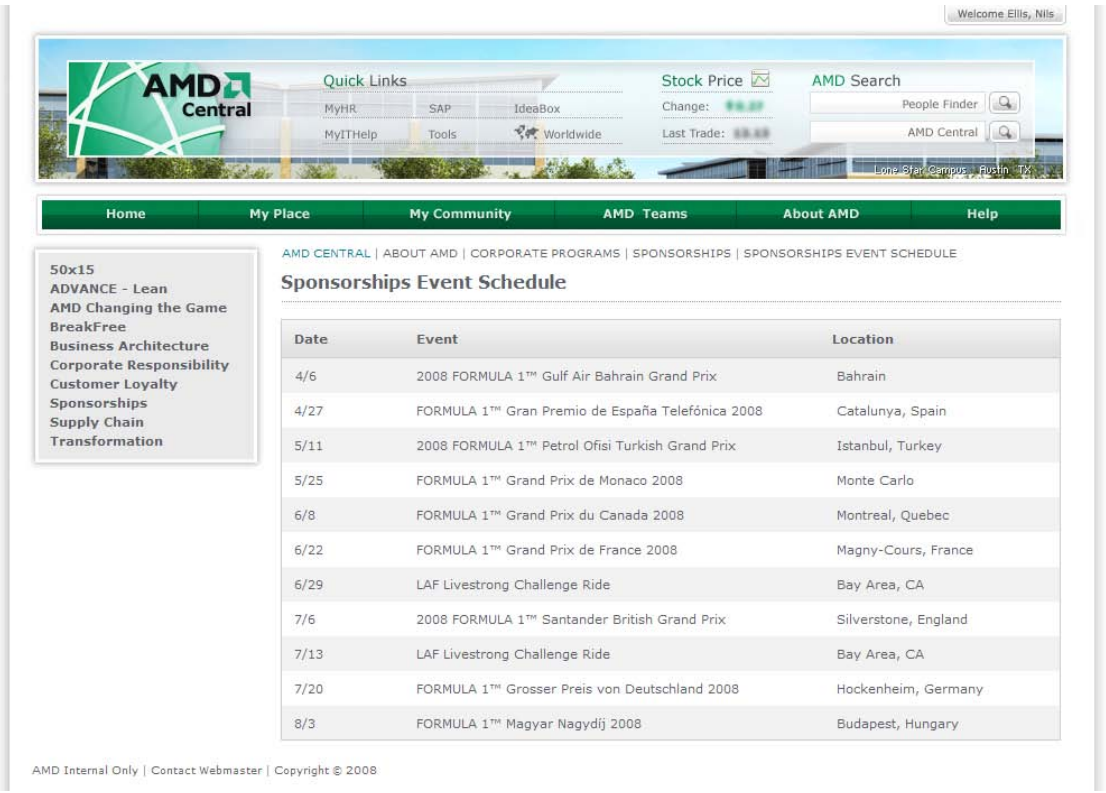
The left-side navigation, always consistent in look, changes content depending on the selected area of the intranet. The *New and Events* section, for example, shows categories for *External News*, *Internal News*, *Events*, *Multimedia*, and *Newsletters.*



Pictured: The top-most navigation and global navigation remain the same across the intranet. The left-side does change, depending on the selected area. The *News and Events* section shows categories for *External News*, *Internal News*, *Events*, *Multimedia*, and *Newsletters.*

The page layouts are based on templates and provide appropriate columns and spacing for the various content types. The *Sponsorship Event Schedule* section looks much like the *External News* section, and shows categories for the various events.

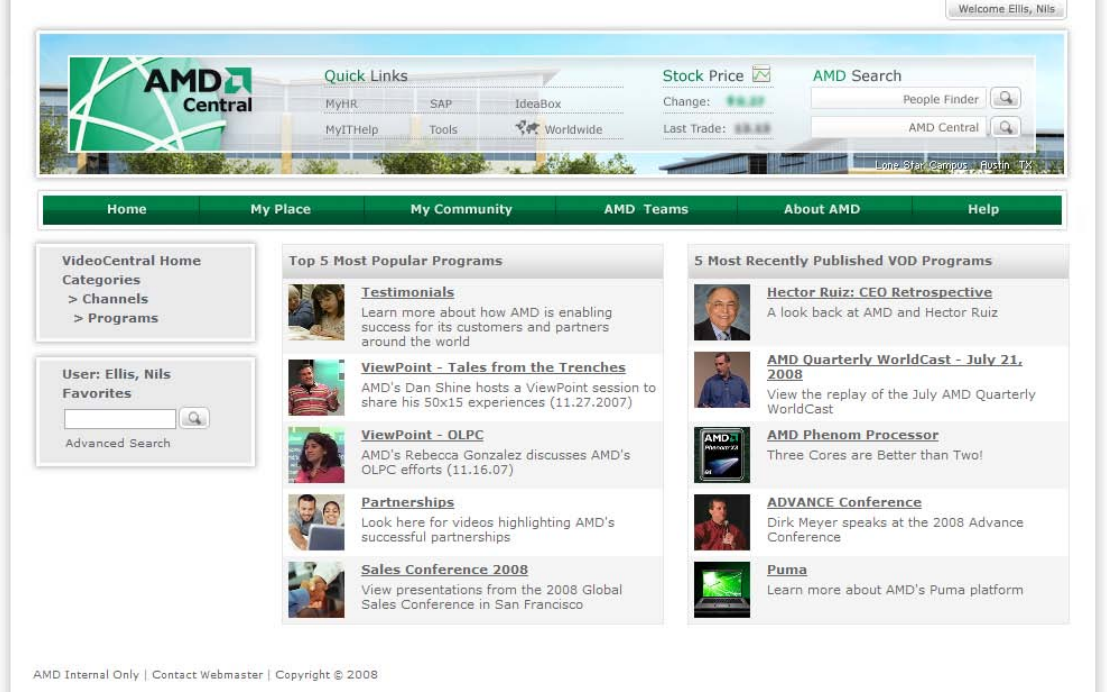
10 Best Intranets: Advanced Micro Devices (AMD)



Pictured: The page layouts are based on templates and provide appropriate columns and spacing for the various content types. The *Sponsorship Event Schedule* section looks much like the *External News* section, and shows categories for the various events.

Yet another intranet section, *Video Central*, looks much like the *External News* and *Sponsorship Event Schedule* sections. This area shows titles and descriptions for the various video programs.

10 Best Intranets: Advanced Micro Devices (AMD)



Pictured: The *Video Central* section looks much like the *External News* and *Sponsorship Event Schedule* sections, and shows titles and descriptions for the various video programs.

The AMD intranet's communication tools and productivity enhancements help the community and were all created within an incredibly short timeframe. Some teams clearly thrive when dealing with an accelerated schedule.

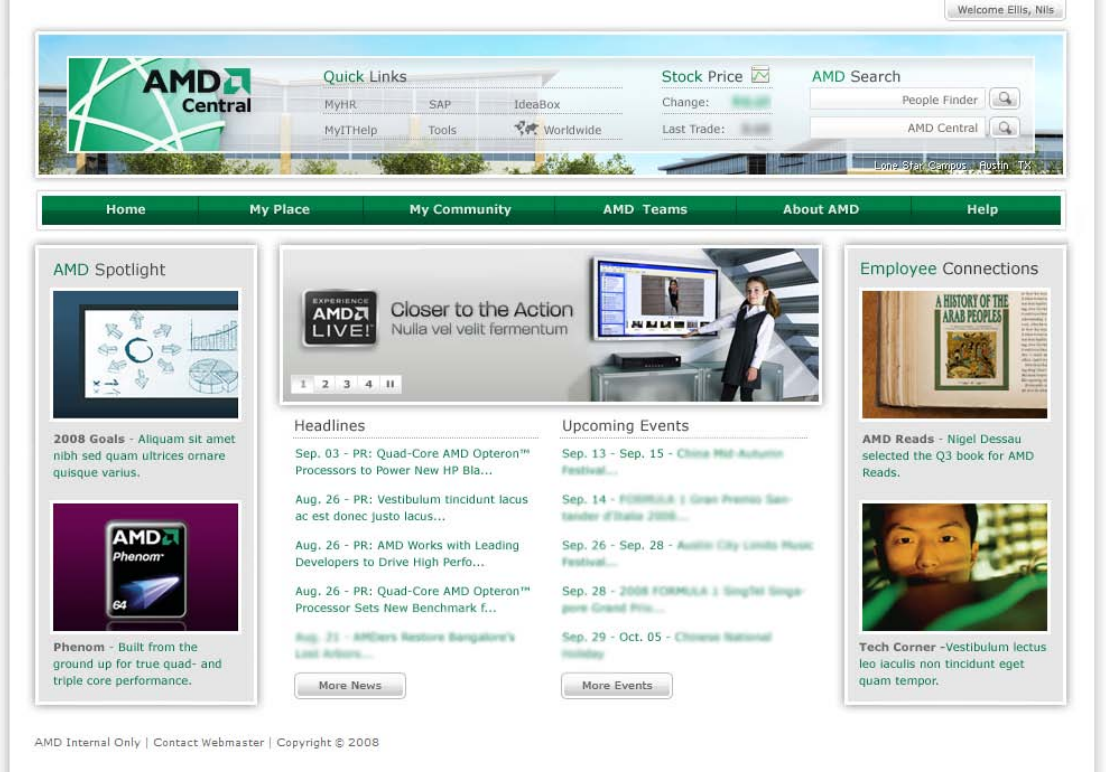
BACKGROUND

"The AMD intranet was set up over seven years ago as a means for sharing information between departments and teams and across the enterprise," says AMD's program manager Andrea Werzner. The site was developed in HTML and ASP.

According to Werzner, the original site grew organically to include links to sites that were housed on servers within departments and outside the IT intranet server environment. "The AMD Central Intranet project was started to bring all AMD intranet sites into one clean, organized site for easy access and maintenance," she says.

The new AMD Central intranet is backed by MOSS. "It has allowed us to lay our design over the system functionality for easy page building," says Werzner.

10 Best Intranets: Advanced Micro Devices (AMD)



Pictured: The homepage for AMD Central, the new AMD intranet. The page's key functionality gives employees the latest news and events information and the most relevant content. The six most-used employee links are located in the top navigation under *Quick Links*. The top navigation also offers easy access to stock information, intranet site search, and *PeopleFinder*, AMD's people search tool. *AMD Spotlight* highlights corporate news items, while the *Employee Connections* section promotes employee-related news and information.

10 Best Intranets: Advanced Micro Devices (AMD)



Pictured: The old AMD intranet homepage. The team set out to improve upon this look with the site redesign.

INTRANET TEAM

Currently, there are three full-time employees devoted exclusively to supporting the intranet. A group of part-time graphic designers, content managers, and developers also support the site as needed. Department owners maintain their own sites on AMD Central using the MOSS CMS.



Pictured: The AMD intranet team. From left to right (front): Andrea Werzner, Nils Ellis, Richard Calderon; (back) Dana Baldwin, Robert Nellis; missing from photo: Renee Irion.

Governance

Site governance lies with the Employee Culture & Communications (ECC) team, with input from key areas such as HR and IT to help constantly improve the intranet experience.

This placement has been beneficial for the site's growth. "The placement of the intranet with the ECC team has meant that the intranet has been set up to be a true communication tool in its newest form," says Werzner. "The latest news and information appears prominently on the AMD Central homepage. Care has also been taken to ensure that great vehicles for employee communication and culture building were set up on AMD Central." These vehicles include online employee forums and blogs.

"The ECC team has ensured that the new intranet is more than just a news source, it is now an online community hub that feeds the growth and spirit of AMD," says Werzner.

Prior to its placement within the ECC, ownership of the site was within the Internal Communications team. This team became the ECC team. Originally, this group consisted of a few full-time employees—program manager/editorial lead, a writer/program manager, and a content manager to maintain the site. "Individual departments maintained their own sites, with support lent to them by the Internal Communications team, as needed," says Werzner.

Working with Agencies

While Werzner's team executed the design concepting on its own, they relied on an outside agency to take that concept and make it work within the MOSS backend. Werzner and her team owned the design, program management, and project management and analytics/usability activities before working with the vendor Catapult to apply the required tools and design to the system backend.

"Catapult applied the final design created by AMD team member Nils Ellis to the front end of the MOSS platform and took a Microsoft application to a new level that even Microsoft has lauded as a great example of their product being customized to fit an enterprise's brand and style needs," says Werzner. Specifically, Microsoft has recognized how Catapult implemented the idea of pulling the *My Place* data into the top navigational drop-down menu.

"No one was able to achieve this before us and it has proven to be one of the most functionally significant and popular elements used by employees," says Werzner.

"Catapult was also able to allow us a two-level drop-down navigation menu without the use of fly-out menus—which is the out-of-box behavior provided by Microsoft," she says, adding that user data showed that their employees disliked fly-outs. Because they wanted to give employees "the ultimate user experience," they had to find an alternative approach. "This meant customization, and Catapult was able to deliver," says Werzner.

GOALS AND CONSTRAINTS

The mission behind the project was to launch a redesigned AMD intranet for North American regions leveraging the MOSS platform. And the goal was to do this within six months.

"If you looked at AMD Asia's, AMD Germany's or AMD USA's intranet, you would have thought you were on a completely different intranet on each," says Ellis, the project's art director. "One of my biggest goals was to standardize the look and feel while keeping the design accessible for all of our regions."

Other planned enhancements included:

- More organized and user-friendly site structure
- Streamlined site look and feel
- Enhanced community tools including blogs, forums, and calendars
- Improved search functionality (searching page content as well document folders)
- Make latest news and events prominent on the intranet homepage for easy communication and access

Resources

As mentioned previously, the AMD intranet team is small, but through their committed effort, they were able to deliver a big project in a limited amount of time. "Our team was very small, but mighty," says Werzner. "And, with additional after-hours efforts, was able to deliver the intranet for the requested launch date."

TIMELINE

The MOSS implementation project took six months to complete. This included two months for planning and four months for implementation and execution of a 2,000-plus page/asset site. This also included functionality to enable employees to create their own personalized intranet section.

"It was a very aggressive timeline that was met due to the effort produced by the team," says Werzner.

Key Project Milestones:

- **August–September 2007:** Planning site structure, basic design concepts, and page templates
- **October 2007:** Design concepting and usability testing
- **November–December 2007:** Development of key features and templates
- **December 2007–January 17, 2008:** Testing
- **January 18, 2008:** Launch

According to Werzner, the key challenge now is "keeping the creative vision in line with our new style guide." This takes into consideration their distributed content model where sites are owned and maintained by department owners within the MOSS backend.

USERS

AMD intranet users fall into three broad groups:

- **Marketing and sales employees** use the AMD intranet to find online tools, book travel, and locate contact information for fellow employees in both local and international offices.
- **R&D and manufacturing employees** use the intranet to access online tools, industry standards, and online research materials, and to collaborate together and share information with the rest of the enterprise.
- **Corporate employees** in groups such as HR, IT, and finance use the intranet to share news and events with all employees, coordinate employee functions, and gather employee feedback via online tools and surveys. They also use the intranet to register employees for training classes and engage employees in online forums.

USER TASKS

The AMD intranet supports several primary user tasks, including:

- Search for staff
- View organizational news and upcoming events
- Locate an office
- Access HR system, IT help system, travel system, and various other online tools
- Search for the latest documentation
- Participate in online forums with other employees and management
- View and post responses to a company leader's blog
- Access fitness center activities and calendars
- View team or departmental information
- Review the company's culture, goals, and strategies
- Connect with and find regional teammates and regional office information

10 Best Intranets: Advanced Micro Devices (AMD)



Pictured: A sample news story. The story page includes a left navigation linking to the major news categories. The story appears in the center of the page, with a box to the right that offers images, captions, and lists of related links or stories.

DESIGN PROCESS AND USABILITY ACTIVITIES

Various motivations might fuel the desire for an intranet redesign, but the actual project is often launched due to some larger organizational event. In AMD's case, that event was a corporate merger. "AMD had recently acquired ATI, so it was essential to merge all relevant content for both companies and provide a consistent look and feel," says Ellis. "We also wanted to make sure we didn't alienate our new ATI team members!"

Surveying Users

To get started, the team did some online surveying of users—asking questions about the existing site to gauge their satisfaction and look for areas to improve. They often asked about specific, commonly used features of the existing site. The survey also included open-ended questions to encourage employees to comment on what they would most like to see in a new intranet.

"Employees shared their frustration with the site structure and also said they had a hard time finding new information," says Werzner. "Search was also a pain point as it did not consistently work on the old intranet."

The team posted the surveys globally on the intranet to gather employee data/feedback. With this information in hand, Ellis set out to create the new site design. These initial surveys also helped guide the initial build of a few prototypes that the team would later employ in user testing.

Developing a Design Approach

Ellis says his initial approach to any project is to immerse himself in the product or service he is designing for. And this project was no different. "I wanted to discover the little details that we can make better or incorporate into the design," he says. "AMDers had a very strong opinion about the old intranet… and had great information on how to make their workdays easier and hopefully more entertaining on some levels."

He started with three design approaches: one conservative, one middle-of-the-road, and one that was more progressive; the middle-of-the-road design ultimately won.

"The most consistent elements across all three was more of a modular design based on a tight grid," says Ellis. "The old intranet was a typographical nightmare with little thought given to the small details. I spent a lot of time with our Microsoft vendor to tweak the templates and styles to be as tight and consistent as possible across the site." Because the new site would be on the MOSS platform, this step was critical to the project's success.

Some of the challenges Ellis wanted to address included making the site styles both easy and bulletproof to ensure that the site owners didn't "blow their sites up." He also took great care to keep as much content above the theoretical "fold" as possible. "So I decided to incorporate as much relevant and useful content in the header as possible," he says.

Testing the Prototypes

In addition to involving the users prior to kicking off the design project, the team also brought users in for usability test sessions on the prototypes as they were being developed.

"Our team art director created several prototypes for a new homepage and site structure," says Werzner. "We ran two rounds of usability testing with an agency and asked the testers to provide feedback on the new site elements and structure."

The team then used that feedback to refine the new design.

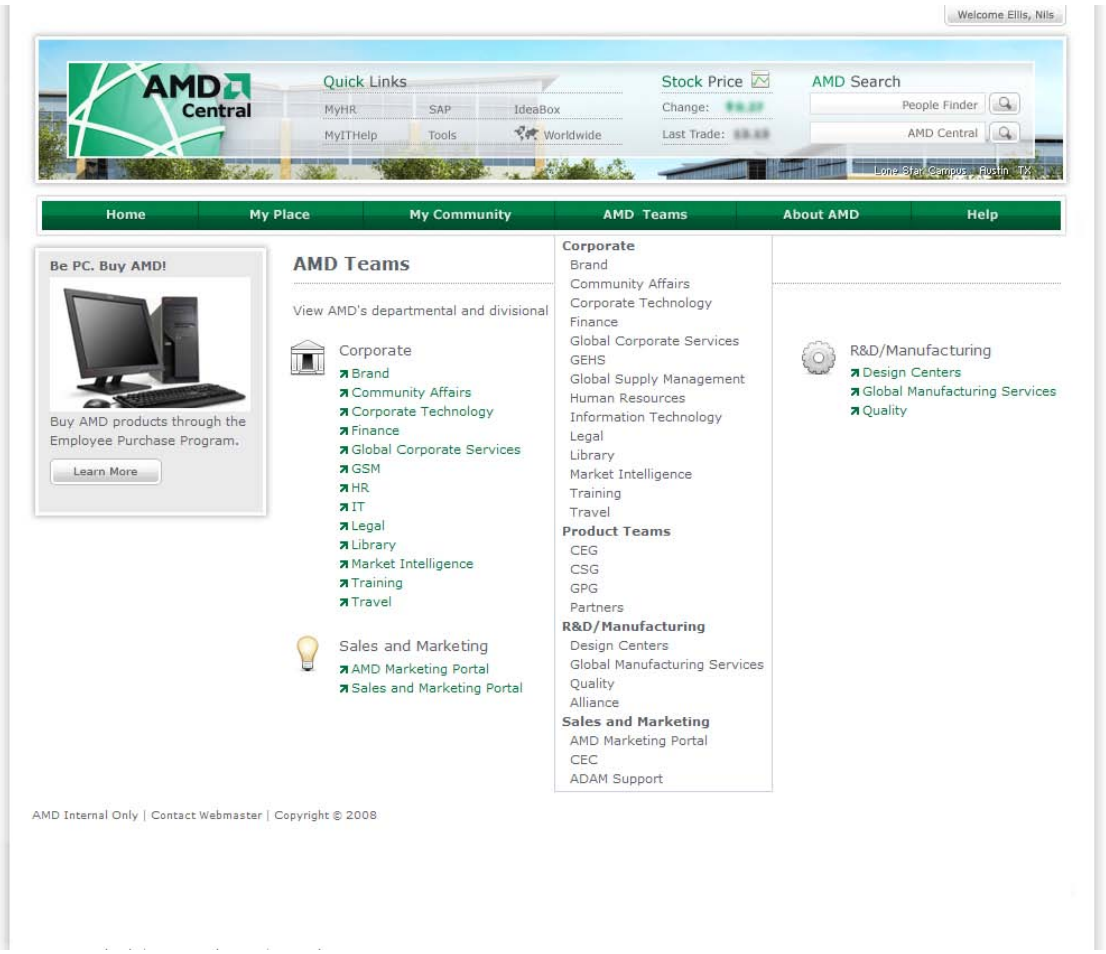
Testing New vs. Old

Team members also conducted a comparison test, exposing users to both the existing site and the new site design. They conducted the tests using an online discussion panel moderated by a third party. "We had one English-speaking online panel and one German-speaking online panel," explains Werzner. "The participants in both were guided through a series of the same questions and viewed potential layouts to gauge their reaction to the each layout and the proposed site structure."

"We included a screenshot of the old intranet in the usability testing done on the prototype design to gauge the testers reaction to the old versus the new design," she says.

Participants were also asked to view the old intranet and give feedback on its look and feel, as well as its pros and cons. The third-party agency moderating the test tallied the panel results and presented them to the design team for consideration as they were choosing the final design and finalizing the site structure.

The comparison showed that the tested users found the new intranet easier to navigate and the new design more engaging. "A few testers noted that they liked the *Quick Links* section," says Werzner, adding that in the new design, it was located in the top navigation and thus available on any intranet page. "On the old intranet design, a few links were on the homepage for easy access, but disappeared on all internal intranet pages."



Pictured: A hub page for the *AMD Teams* section. The page has a drop-down menu with sub-sections and nested sites by section.

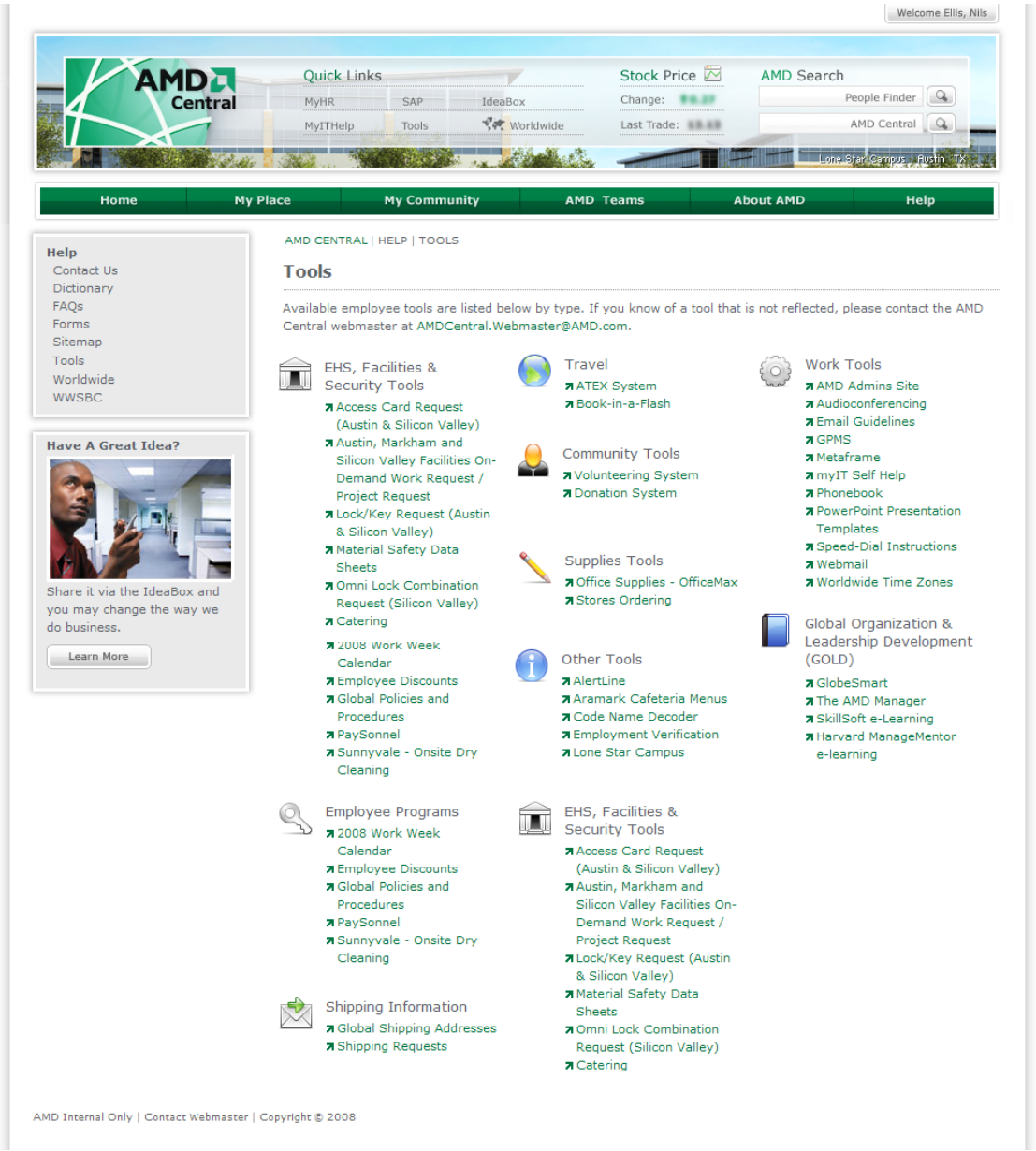
Listening to Feedback

User feedback from the test sessions encouraged the design team to set aside some ideas they had for the homepage because users simply weren't on board with the ideas. "One of the features I really wanted to offer initially was more user-generated content and interesting offerings on the homepage like an employee spotlight or audio player featuring AMDers with bands," says Ellis.

"Surprisingly, users didn't seem to have any interest in this," he says. But users are actually often willing to put aside gratuitous or "fun" features in favor of more functional items. And that was the case at AMD.

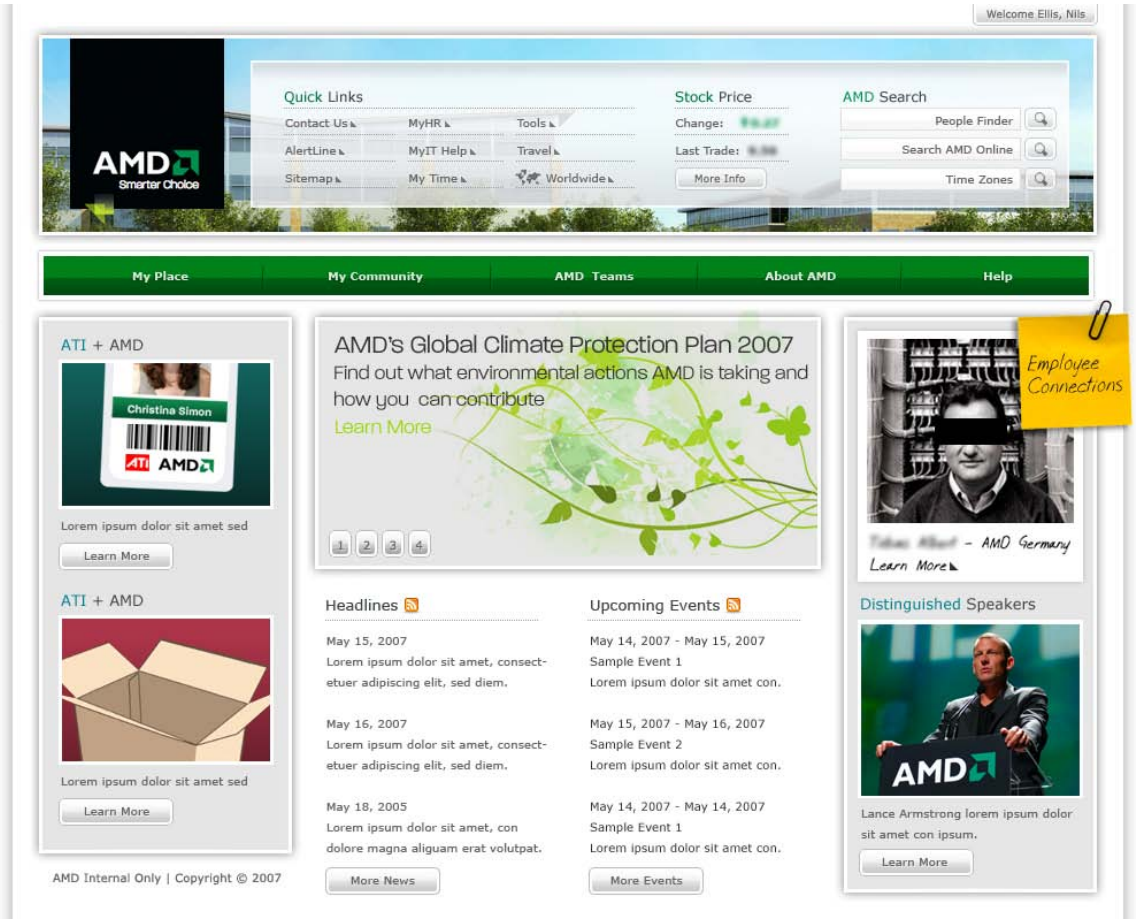
"They really wanted a more utilitarian approach to the new intranet to streamline daily tasks," says Ellis. "I took this into account a lot more after usability. Even when I did develop more interactive and visually stimulating content, I leaned more on the side of functionality than any real high art design."

10 Best Intranets: Advanced Micro Devices (AMD)



Pictured: The main screen for AMD's *Tools* page. The intranet team gathered links to key online tools to make them easily available to employees in a central location.

10 Best Intranets: Advanced Micro Devices (AMD)



Pictured: A homepage layout that the team put through usability testing to garner employee feedback.

URL AND ACCESS

AMD Central can be accessed at http://amdcentral.amd.com and the site is set as the homepage in employees' browsers. Remote access is available via VPN from any computer with Internet access.

TECHNOLOGY

AMDCentral was built using MOSS with Microsoft Web Content Manager. The Web server architecture consists of two types of front-end Web servers: one index/application server, and two database servers. The servers run Windows Server 2008 as the operating system.

SEARCH

MOSS comes with an enterprise search engine that includes capabilities for configurable relevance, best bets, search scopes, and advanced search. "This is a great improvement from the search engine included within SharePoint Portal Services 2003," says Werzner.

As a sister site, SearchAMDCentral.com was built on the MOSS search engine and has its own unique branding. Across AMDCentral and SearchAMDCentral, a third-party vendor, HitBox is used to track traffic and search result activity.

Tracking and Growing Search

"SearchAMDCentral is on the same server farm as AMD Central but on another MOSS site because we intended to grow search to include more than just intranet content," says Werzner. "We wanted to expand it to include collaboration team sites and eventually employees' profiles as well. With all that varying content to search, we thought it best to have its own website for reference." They also went with what she calls a simple "Google-esque" layout for the search pages to keep the focus on the search process and results.

"It's a layout unlike anything we have on AMD Central proper," she says.

The organization uses Hitbox reporting behind the intranet because, Werzner says, "it's an enterprise tool that allows us to set up campaigns tracking particular Web elements in conjunction with one another."

The out-of-box reporting with MOSS functions well, she says, but they don't have the same campaign functionality as with Hitbox. "Hitbox actually allows us to view the percent of click-throughs on any given page for all links and images," she says. "This gives us additional insight into what are popular elements on the page and which result in an increase/decrease in click-through activity."

Using the Results

Werzner says that the team tracks the number of visitors to the site/pages, the click-throughs on links and images, the average time per visit, the most followed links/stories, and the most-visited sites/content. Based on this traffic data, they change page layouts and site navigation. "For example," she says, "we ran a report on popular search terms after our launch and found employees were often looking for more information on AMD's new Austin, Texas, campus named 'Lone Star.'"

Based on that demand, they decided to add a direct link to the Lone Star sub-site under the *About AMD Locations* menu in the top navigation drop-down.

"This gave people direct access to the Lone Star site without them needing to first visit the *Locations* sub-site," she says. "As a result, we noticed a drop in the number of 'Lone Star' keyword searches."

It's not enough to simply track search results and monitor traffic; you have to put that data to work to make search more useful. Search data can also provide guideposts as sites grow. "Traffic monitoring is very helpful as we grow the site," says Werzner. "We are able to ensure that the site structure, navigation, and page elements are meeting their original needs. If they are not, we can tie data to each element and then make a decision on changing layouts and site structures accordingly."

CONTENT MANAGEMENT

Both content and document management are handled by MOSS. "One of the best new features within Microsoft Office SharePoint Server 2007 is its fully integrated Web content management system," says Robert Nellis, senior consultant with Catapult Systems. Formerly a stand-alone product, "Microsoft Content Management Server was rolled into MOSS 2007 to provide a Web content management capability to the portal product," he says. Like the other parts of MOSS, the CMS is built on .NET technology.

"Tracking changes in this environment is easy," says Nellis. AMD uses two mechanisms to keep an eye on the changes. "Since the documents and Web pages

within the intranet are versioned, we take a look at previous versions and—with the tools available to us—we can visually see what changes have been made," he says.

"Additionally, for pages and documents that we want to keep a closer eye on, we set up e-mail alerts so that a few key people are notified any time the document or page in question is modified."

AMD's intranet team has designed page templates for users to create pages and enter content. The templates cover a wide variety of page types, including: department pages, campaign pages, news pages, and event pages.

Along with these templates, a template guideline was created and distributed to site owners to help them understand each template's intended use.

"It is extremely easy to enforce and distribute the templates," says Nellis. "Once the templates are created, they are not immediately available for use to the general public." First, says Nellis, site owners select the templates that they want their content managers to use. They then add those templates to the library for general use.

Security for AMDCentral is what Nellis calls a "very granular model." Part of this model is the definition of security groups whose purpose is to hold content managers (CMs) and grant them appropriate design permissions. "For example, there is group that grants content management rights for the *AMDTeams* Web site and a different group that grants such rights for the *AMDReads* site," he says. "Each of these groups have different members, so the CMs for the AMDReads site do not have such permissions on the AMDTeams site, and vice versa."

This model allows for decentralized control, thus removing the burden from the intranet team.

FEATURES

Intranet features can do many things. They can improve work efficiencies. They can support mission critical tasks. They can even add value to the business. The features on the AMDCentral intranet provide a good selection of each.

Team favorites:

- **The ability to promote certain items.** This is accomplished on the site's homepage, in what Werzner calls "a very visually appealing way," via promo images and text. "This is not necessarily a technical feat," she says, "just a really cool concept."
- **The top navigation banner's rotating background image.** "The background image rotates on each page load," says Werzner. "This is a great way of showcasing different AMD locations and other items of interest."
- **The site's *My Place* section.** This is an employee-customizable section with a direct link in the top navigation. The section lets employees add links to the tools and Web pages they frequent to do their jobs. The links are then displayed in the top navigation drop-down menus whenever the employee visits the intranet.

Mission critical tasks:

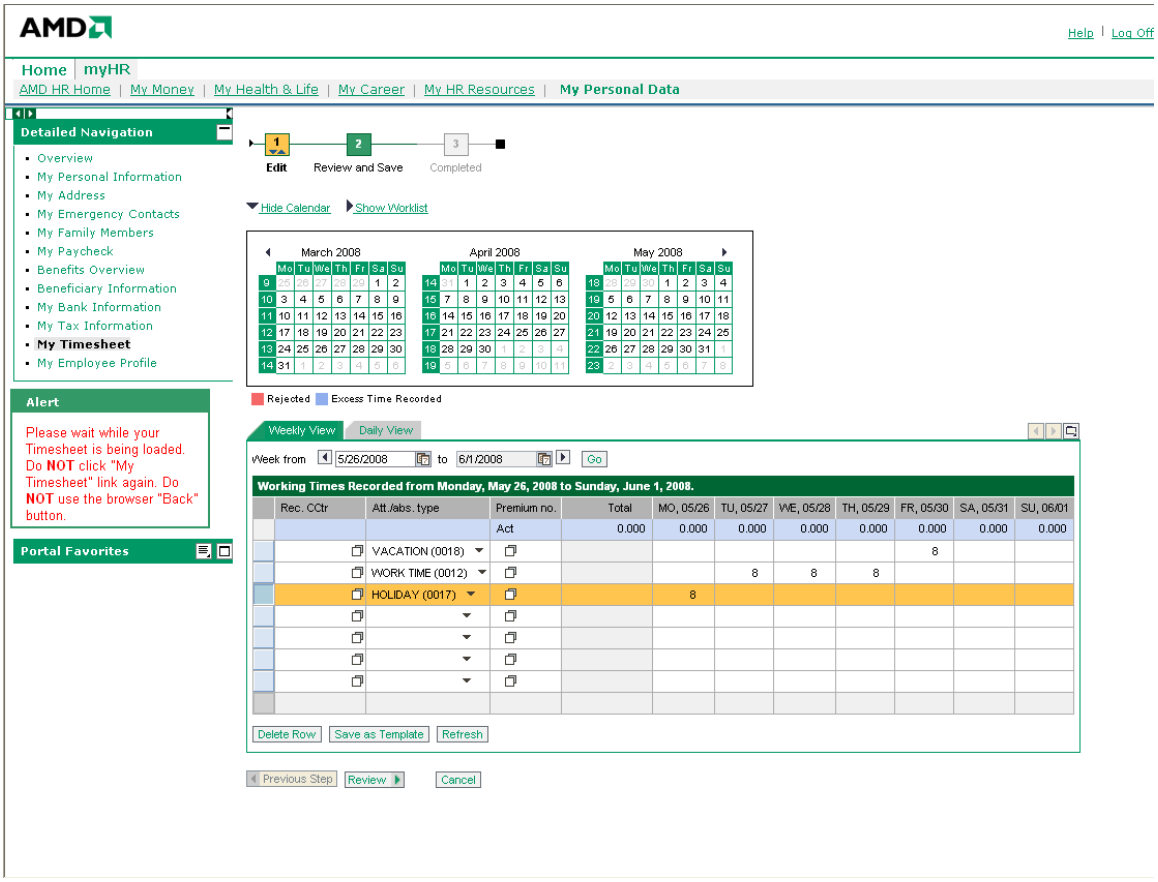
- ***MyHR*** is an SAP-based tool linked from the intranet. It supports general employee life (time reporting, expenses, benefits, and so on).
- ***MyITHelp*** is a tool linked to directly from *Quick Links* that puts employees in online contact with the IT HelpDesk to request work and report issues.

10 Best Intranets: Advanced Micro Devices (AMD)

- ***AMD Video Portal*** is a new feature that houses internal videos and communications for easy viewing and access companywide.

Features that add the most value to the organization:

- ***My Place*.** This intranet section is in the top navigation and is customizable for each employee. *My Place* lets employees add links to the menu, which will then appear in the top navigation drop-down menu on future visits.
- **Blogs.** Blogs were set up to allow key management figures to share experiences and thoughts with employees and engage them in productive dialog.
- **Site search.** The enhanced search lets employees quickly find the most relevant content for their search term. It also offers "best bets" for commonly searched terms.
- **Calendars and events roll-up.** Monthly calendar views let groups post events for employee viewing and signup. An overall corporate calendar rolls up to the homepage to quickly display key corporate events to employees.



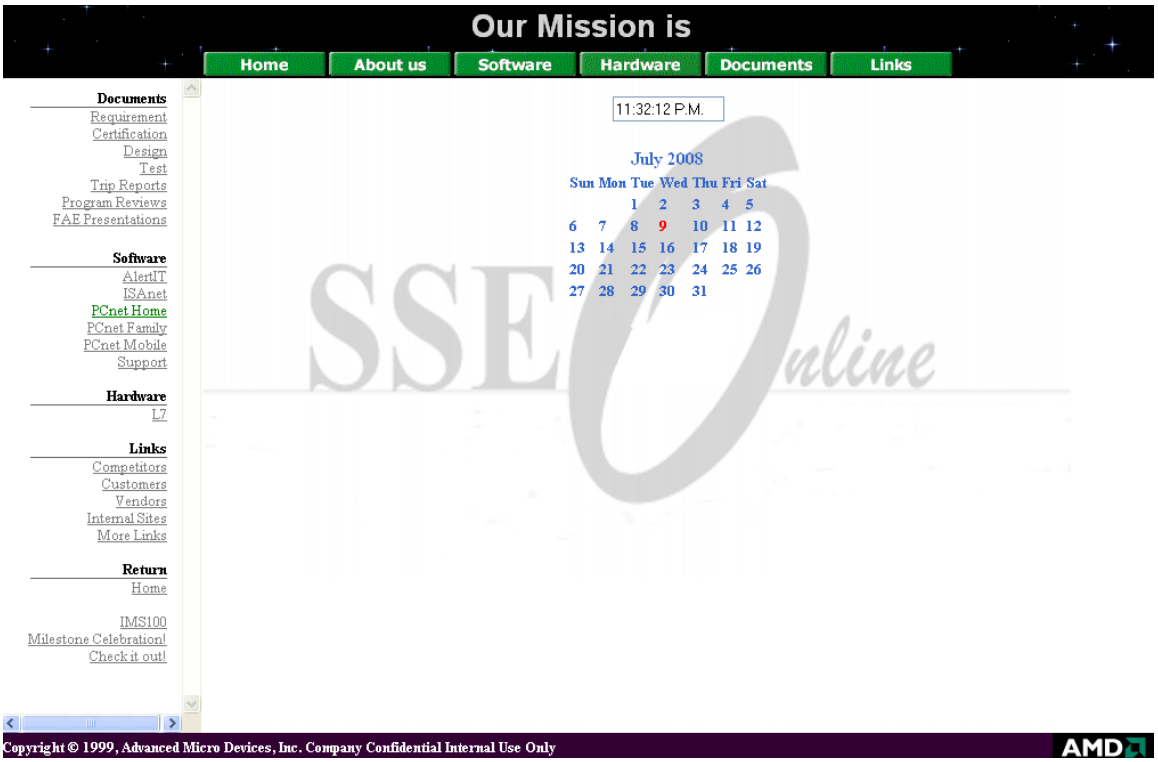
Pictured: The *MyHR* application. *MyHR* lets employees review—and in some cases, manage—their personal, pay, performance, and benefits information. The team planned and designed the application based on employee input.

10 Best Intranets: Advanced Micro Devices (AMD)



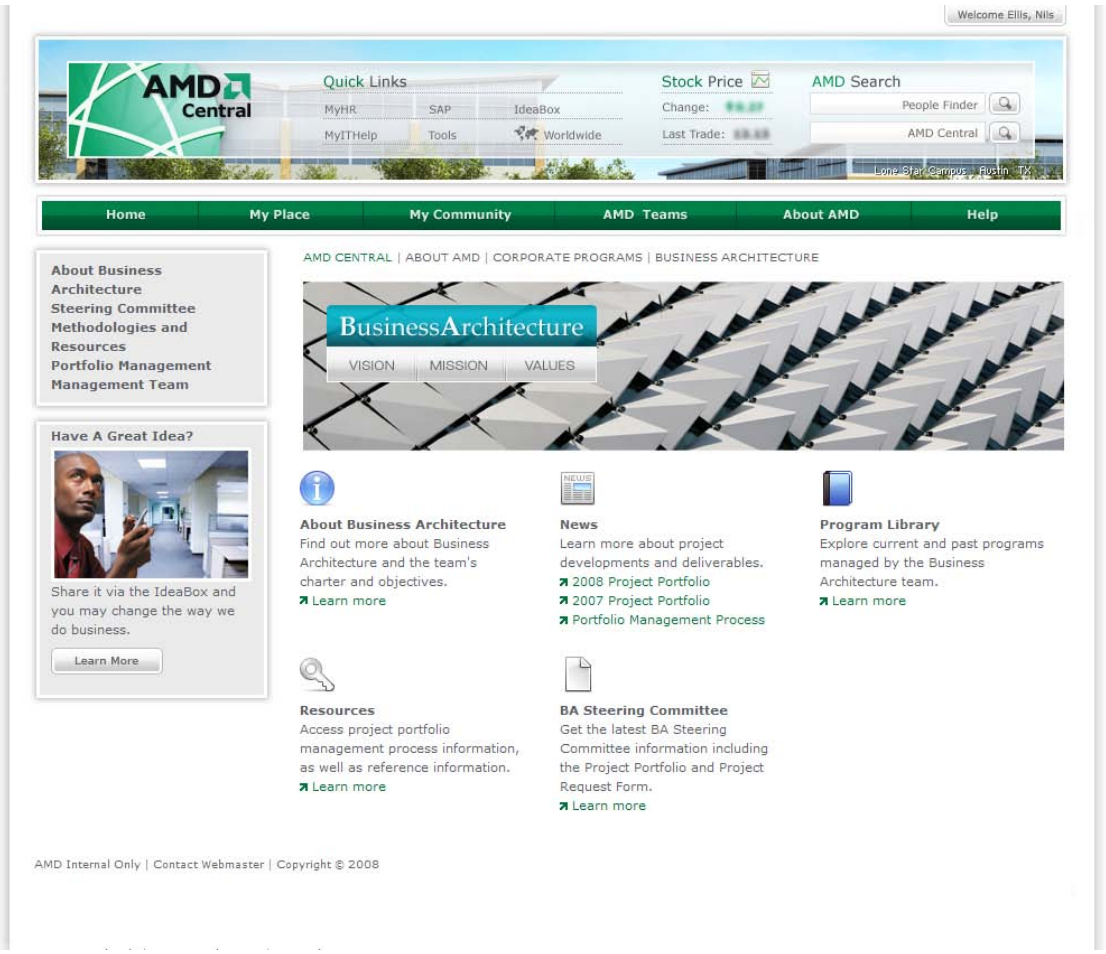
Pictured: A sample department page layout. The layout includes a left navigation bar; a main body of text with introductory text and image; and a series of icons and links to important department sections. This layout also includes a promotional box on the right side for department use.

10 Best Intranets: Advanced Micro Devices (AMD)

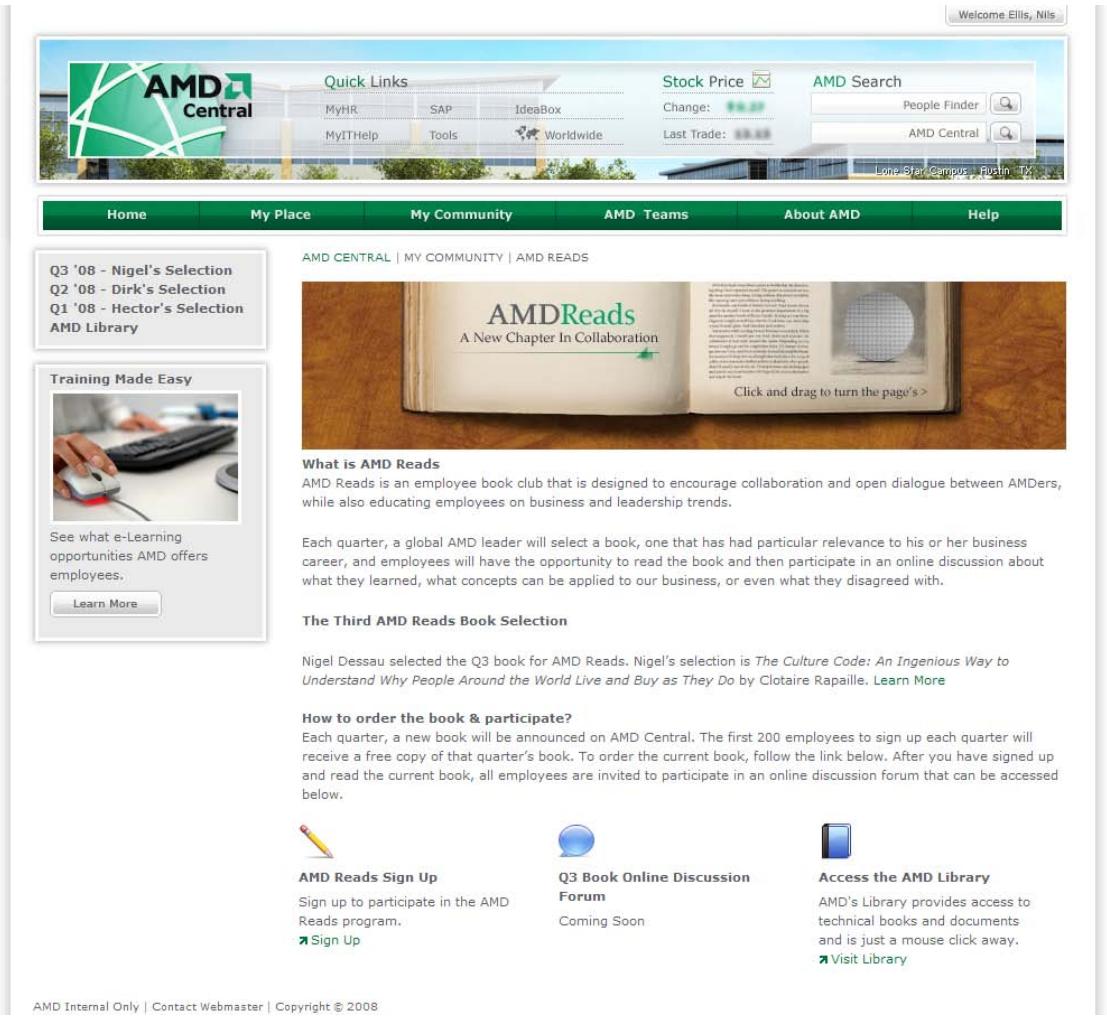


Pictured: A department page from the former intranet. There is no left navigation and the style is inconsistent with the homepage.

10 Best Intranets: Advanced Micro Devices (AMD)



Pictured: A campaign page layout for company initiatives. The layout includes a left navigation, a large banner image, and a series of buckets that include an icon, descriptive text, and links to important pages/documents related to the campaign.



Pictured: A second campaign page layout. This layout includes an interactive Flash banner at the top of the page, along with a left navigation and a series of content chunks that include an icon, descriptive text, and links to important campaign-related pages and documents.

Collaboration Tools

Closed Collaboration

Like the rest of the AMD intranet, a SharePoint tool also handles collaboration functionality. AMD has a separate Microsoft SharePoint collaboration environment, but the intranet links directly into it to allow for easy access to the collaboration sites.

The upside of having such collaboration sites is that it gives a locked down environment for teams to work on tasks together before releasing information to the general employee population. The downside is that many of these sites are locked down. “Although we link to them,” says Werzner, “unless an employee has been previously granted access, they can’t view the collaboration site.”

Werner says the fact that collaboration team sites lock down is very important: it lets teams work together comfortably without the fear of releasing sensitive or draft content. Typically, the people trying to visit a collaboration team site via an intranet link have already been granted access.

"We rarely see complaints about the security around these links as we call-out next to each collaboration link that the site is locked down to team members only," she says. "We typically use a 'lock' icon to indicate secured sites."

The collaboration site links are popular within the teams granted access. "They like having the ability to work together on a document or project and then take their final work and publish it publicly on a department site/page on the AMD Central intranet," she says.

Open Collaboration

Collaboration tools are also used to promote a sense of belonging and community. *AMDReads* is a site where an AMD executive recommends a book to read each quarter; a discussion board gives employees who read the book a place to share feedback.

AMDBlogs is a collection of sites that enable select management team members to comment on items of interest. The posts are open to feedback from the general employee population.

Knowledge Management

The site doesn't utilize any specific knowledge management tools, but the team is working on rolling out wikis for future use.

LESSONS LEARNED

Key team members describe some of the lessons learned in developing AMD Central.

Andrea Werzner, program manager:

- **A tight timeline = more overtime.** The AMD project was executed under a very tight timeline. Despite this constraint, it was delivered on time. Meeting the deadlines, however, came at a cost to the team. "The core team gave their all and put in whatever necessary hours were required over weekends, holidays, etc. in order to meet a much anticipated launch date earlier this year," says Werzner. "In hindsight, had we allowed ourselves more time to complete the project, we could have done it during more typical working hours. A great feat and team effort, nonetheless!"

Robert Nellis, senior consultant, Catapult Systems:

- **Include everyone who needs to be involved.** Keeping all the right people involved along the way was a critical factor for this intranet's success. "A project like this takes the involvement of your design team, your brand team, as well as your deep technical team," says Nellis. "The ability to bring all of those people together early is critical for a project of this scale and aggressive delivery schedule."

RESULTS / ROI

The AMD team achieved a variety of results from the new site, but the project's primary achievement is that employees are now better able to find online tools as a result of the site's improved navigation and enhanced search functionality. This is a big win, of course, because if employees can't find the tools or information that they need, then even the most beautiful and functional site is not a success.

Werzner said the two big factors in getting top-management support for the intranet redesign were the team's commitment to improving overall employee productivity by making tools and information more easy to find, and enhancing the overall employee

culture at AMD. They accomplished the latter, she says, "by providing an online environment where collaboration and interaction were key to employee happiness and, ultimately, our company's success."

After the project was complete, the users weighed in with accolades for the new site. "We had one employee write in who had been on maternity leave when we launched the site," says Werzner. "She said the new intranet was a pleasant surprise and she'd already added links that she used in her job to her *My Place* section, visited the updated *Management Directory*, looked at one of the new blogs, and participated in an online intranet Scavenger Hunt Contest we'd put together to help introduce employees to the new site.

"That's when we knew we'd achieved our goal: Employees could find what they were looking for and also discover new culture and communication items as well," she says.

Other results include:

- Increased involvement by departments and teams in using the intranet as a vehicle for news and information sharing.
- Information is more up-to-date as site owners and employees are taking a more direct role in maintaining department and team sites.
- Employees have shown through comments and feedback that they find the new intranet more engaging and, as a result, are more involved in participating in online activities.

BASF SE

Using the intranet

BASF is the world's leading chemical company, with a portfolio ranging from oil and gas to chemicals, plastics, performance products, agricultural products, and fine chemicals. BASF helps its customers in virtually all industries be more successful. With its high-value products and intelligent solutions, BASF plays an important role in finding answers to global challenges such as climate protection, energy efficiency, nutrition, and mobility.

Headquarters: Ludwigshafen, Germany

Number of employees the intranet supports: 95,000

Locations where users use the intranet: BASF.net was rolled out globally, in all BASF regions worldwide (Europe, North America, South America, and Asia/Pacific). The global technical rollout of the group intranet with the global BASF.net homepage serves more than 73,000 employees at more than 760 BASF sites around the world.

Annual sales: Almost €58 billion in 2007.

Design team

The BASF.net core team consisted of 10 people including BASF in-house staff and external partners.

Members

In-house: Julia Buchner, project leader; Vladimir Mello, concept and communication support; Beate Zissel, technical project leader; Bernd Schabacker, information manager and intranet support; Bernward Schuka, IT administration; Gerald Ebisch, intranet support, Stefanie Seiter-Walch, intranet support. BASF IT Services: Oliver Schröpfer, technical lead service provider; Claudia Lindner, lead architect service provider.

Pixelpark: Sabine Hoppe, senior designer; Marian Möhren; information architect; Roger Wahl, senior project manager.

SUMMARY

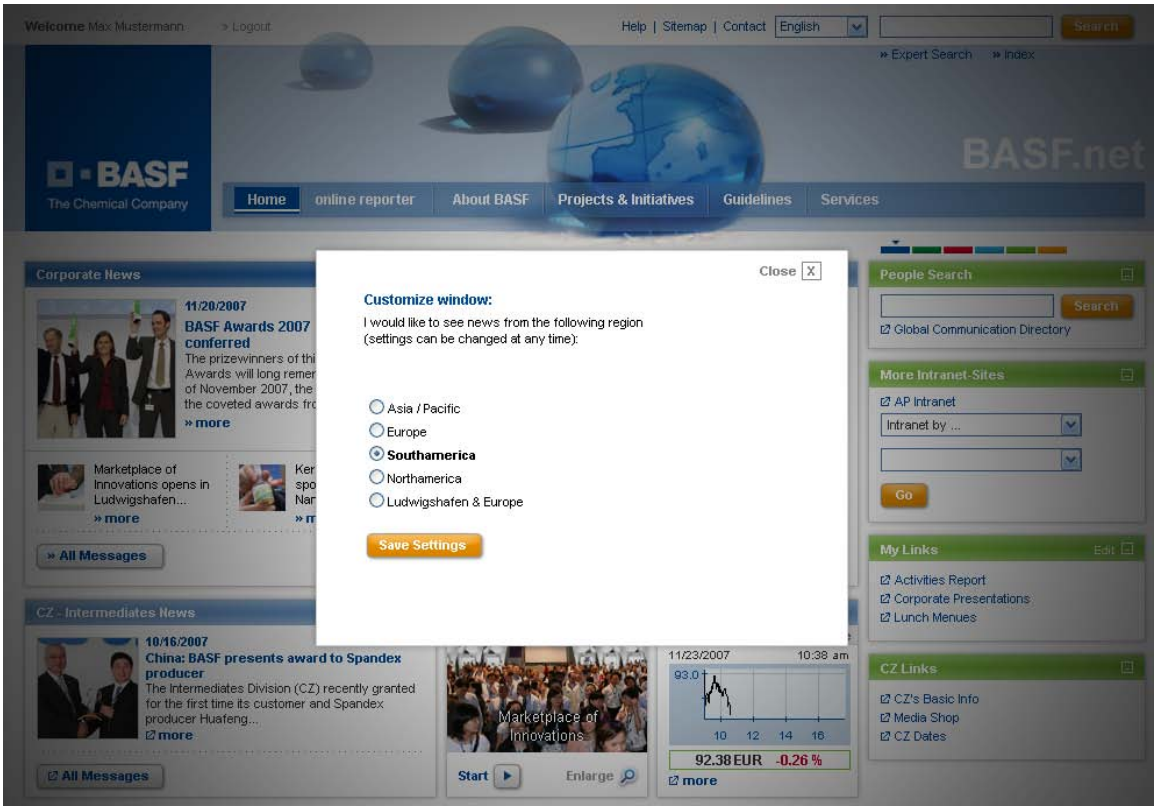
A key goal of the BASF SE intranet was to establish a worldwide communications and information medium and offer a single global homepage for all employees. BASF.net rose to the occasion and is at the ready, supporting 95,000 employees around the world.

Moving with the times, the designers of BASF.net made good, productive use of Web 2.0 features. That is, they didn't use layers and tag clouds just for bragging rights; they employed these capabilities in very thoughtful ways that actually improve the user experience.

The BASF.net homepage has a simple look, yet is not without personality. The top banner picture is filled with buoyant bubbles full of BASF chemicals. The world map stretched across the cheery front bubble reminds users that BASF employees have a presence in more than 200 countries. The borders of the titles on the homepage's many content boxes have a soft yet definite shape and style. The page's colors and images all convey stability and have a pleasing appearance. This no-nonsense homepage has a few, well-placed graphics that give the BASF.net site a positive vibe without cluttering it up with pointless drivel.

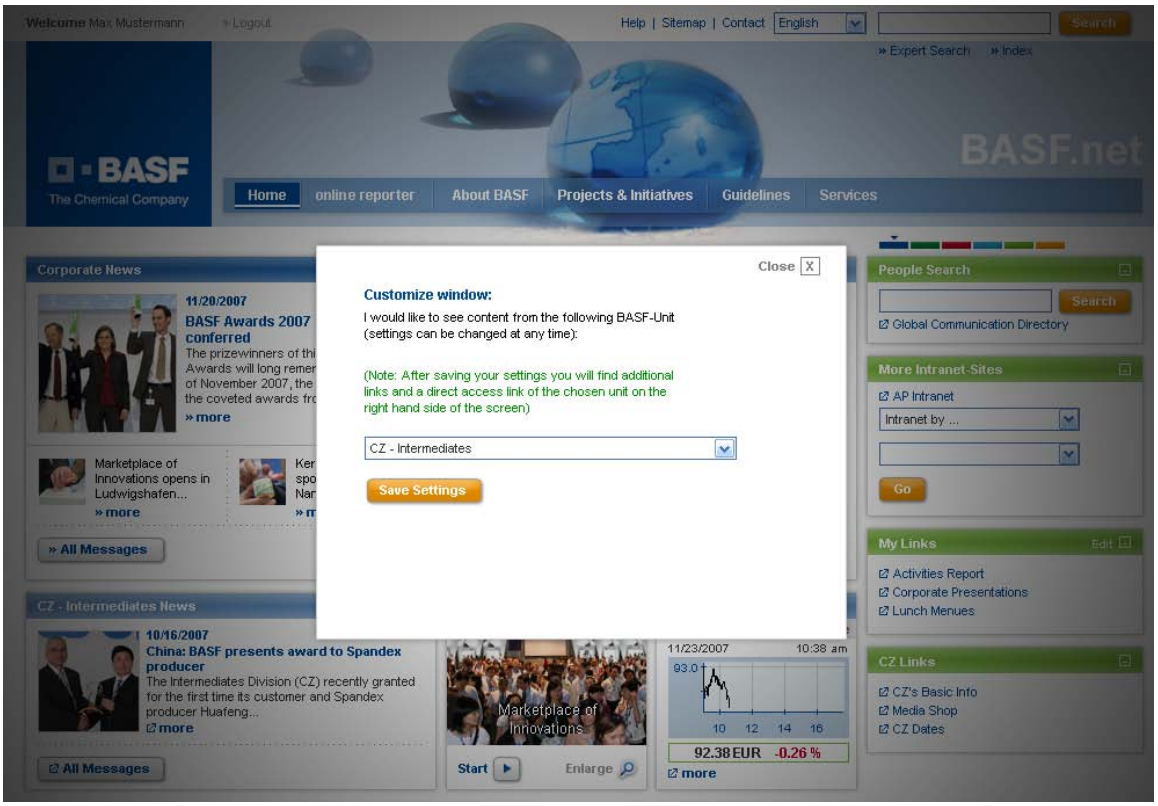
To further ensure that employees find the homepage information helpful rather than superfluous, users can choose and change some of the content boxes (portlets), while the important sections remain fixed. The intranet team was forward-thinking and made it extremely easy to edit the portlets. This is so important; if users can't do this effortlessly—that is, if they have to search for an edit command or can't quickly find the change once they've made an edit—they'll simply avoid customizations all together. In BASF.net's case, customization is a simple process and the feature is easy to find.

Some of the editable portlets include regional news and news and links for particular divisions, as the example below shows. Each customizable portlet has a simple *Edit* link on the right side of the content area's colored heading bar. When users click it, a dialog box opens and users can change the content or remove the portlet. Simple layering techniques make the dialog boxes part of the streamlined editing process.



Pictured: Clicking the *Edit* link in the regional portal (covered by the dialog box here) lets users choose to see news from various regions.

10 Best Intranets: BASF SE

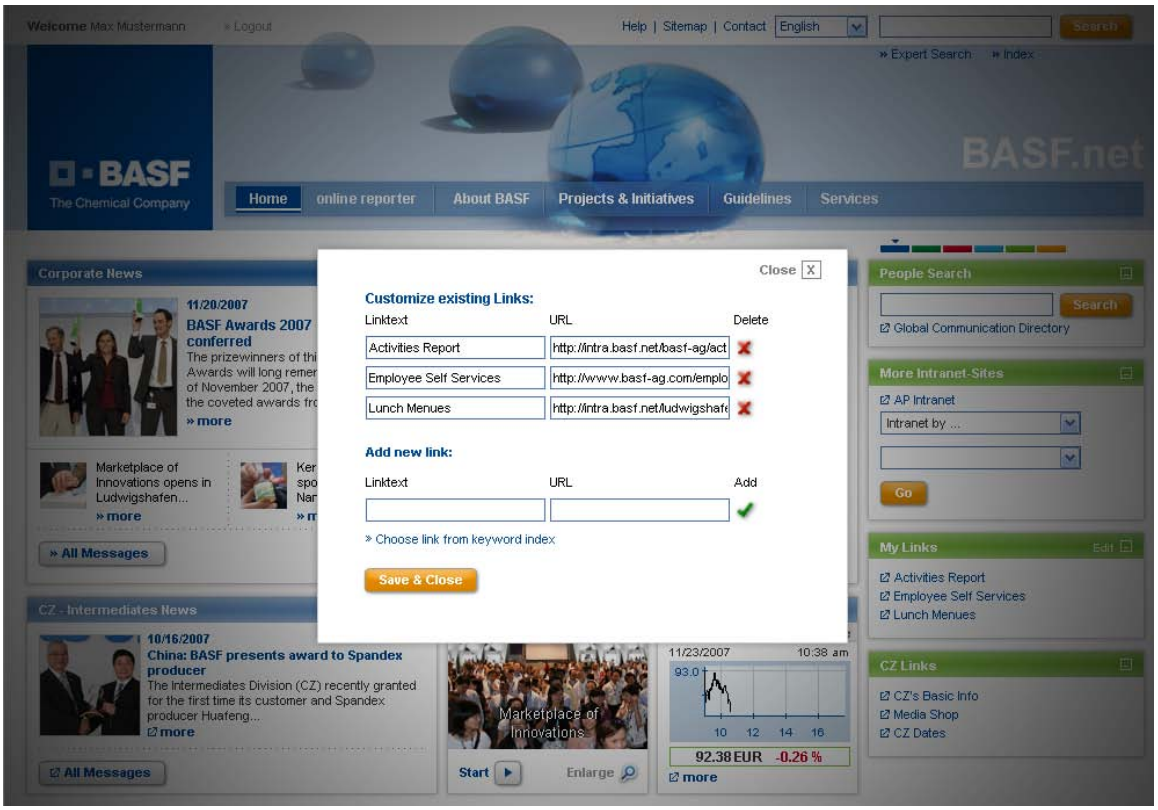


Pictured: Clicking the *Edit* link in the divisional news portal (shown on the lower left) lets users choose from a drop-down list of 33 different BASF units.

The content for these homepage portlets is imported from many different sources within the BASF IT landscape, ensuring that users are offered a variety of news and tool types to help them stay well informed.

Users can also add personal bookmarks to both intranet and Internet pages. These favorites travel with the user login, so users can access them no matter where they are in the world or which machine they're using. These favorites appear in the *My Links* content area in the rightmost column on the homepage. The associated *Edit* button opens a simple dialog box that lets users add, remove, and organize their personal favorites.

10 Best Intranets: BASF SE



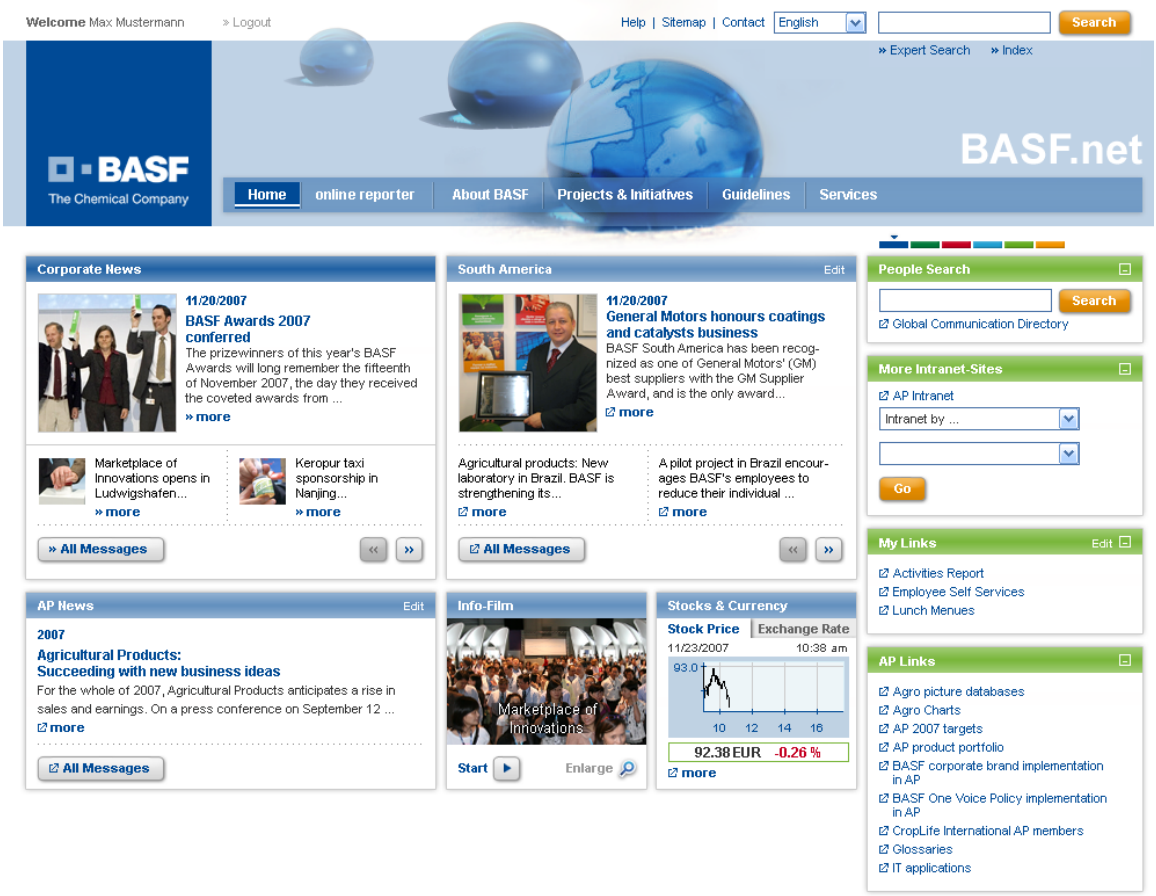
Pictured: A simple dialog box enables users to add, remove, and organize their personal favorites.

One issue we often see on intranets is that users are unable to find content sections that are available to them. That is, information is buried and not as accessible as it should be. But the BASF intranet designers thought of this: users can easily search for more portlets via the *More Intranet* Sites area on the right. This section lets them access all other BASF intranets (from regions, divisions, sites, competence centers, and so on).

Users can also search the intranet or run a people search from the homepage.

For example, the screenshot below shows a portal personalized to match the user's needs. This user chose to read news from South America (the *South America* section heading) as well as from the company's Crop Protection division (the links in the *AP Links* section).

10 Best Intranets: BASF SE



Pictured: A customized homepage. This user chose to read news from South America (*South America* section heading) and from the company's Crop Protection division (*AP Links* section).

The example below shows another customized homepage. Changes here include:

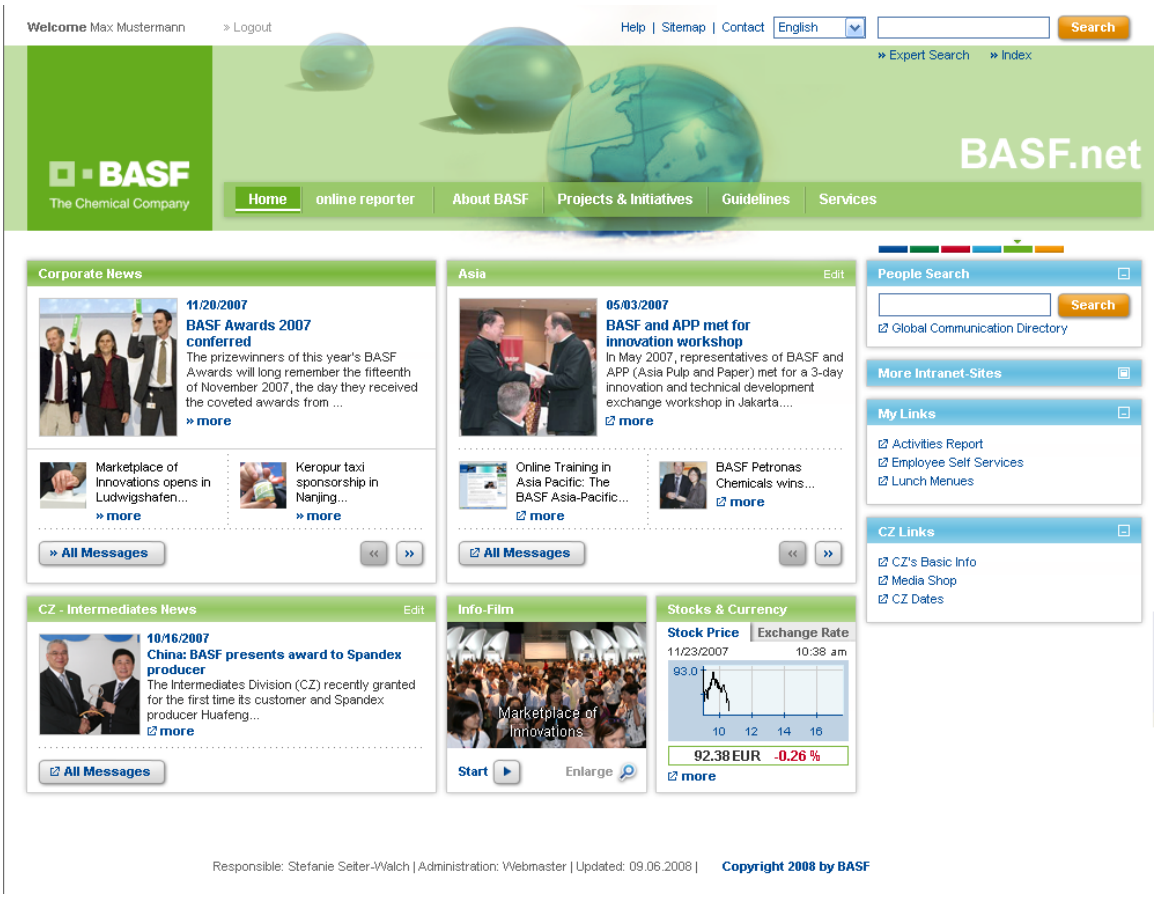
- Division news: News from the *CZ - Intermediates* division (the last portlet in the left-side content column).
- Division links: Links from the CZ division, *CZ Links* (the last portlet in the right-side content column).
- Regional news: News from *Asia* (the top portlet in the middle column).

In this example, the *More Intranet Sites* portlet is available, but collapsed by the user. This is a nice feature for users who want to have a feature available that they don't use every day. Also, while the *My Links* portal is the same in these examples, it would be different from user to user.

The intranet offers six different color schemes based on the six BASF corporate colors. The six color swatches appear just below the global navigation and above the top of the rightmost content area. Clicking on one of the swatches automatically changes the look of the intranet. In our examples, the users chose a blue and light green scheme, respectively.

These choices and all other customizations users make are saved and presented the next time they open the intranet.

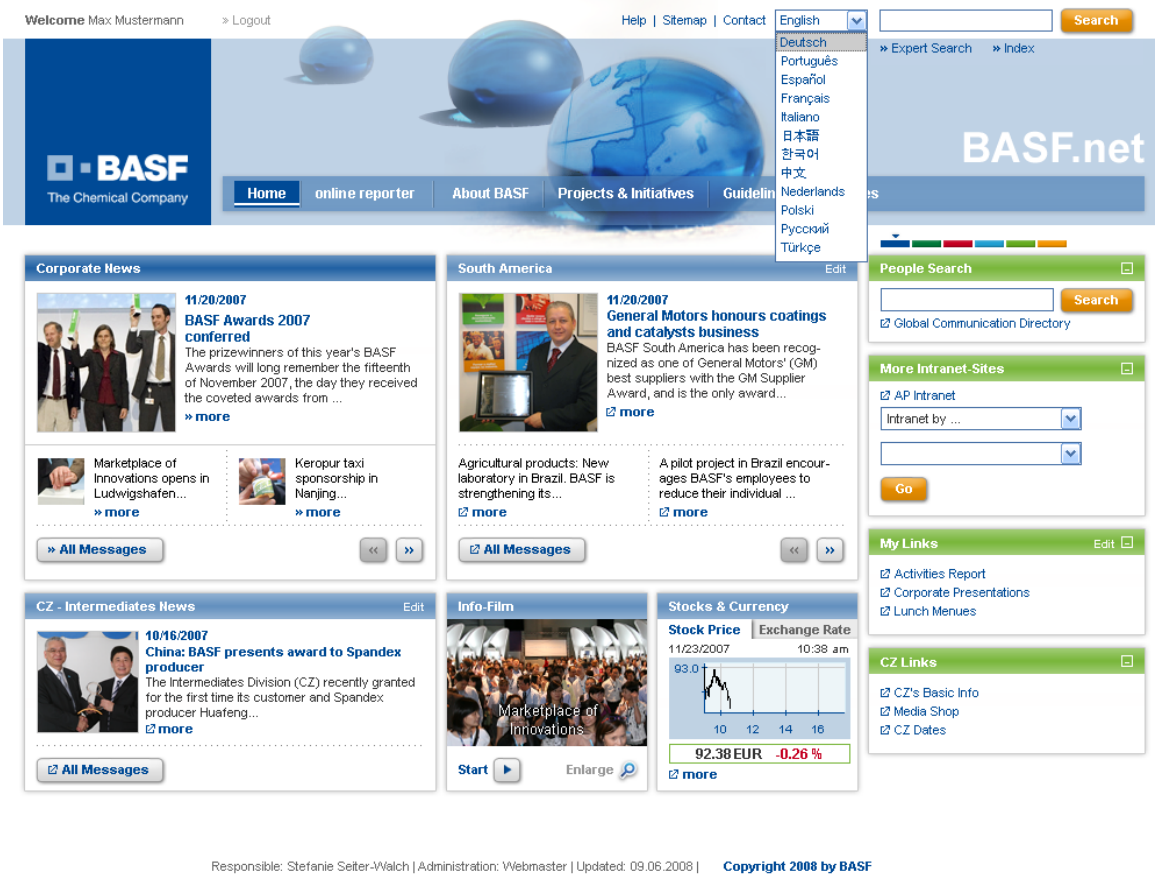
10 Best Intranets: BASF SE



Pictured: Another customized homepage example. On this intranet, users can customize portals, links, and the color scheme.

German and English are the intranet's default languages, as those are the two corporate languages. The intranet also lets users translate static content—such as main navigation bars, buttons, and so on—into 11 other languages to suit what users are most comfortable reading. A drop-down list at the top of the page makes this feature easily accessible.

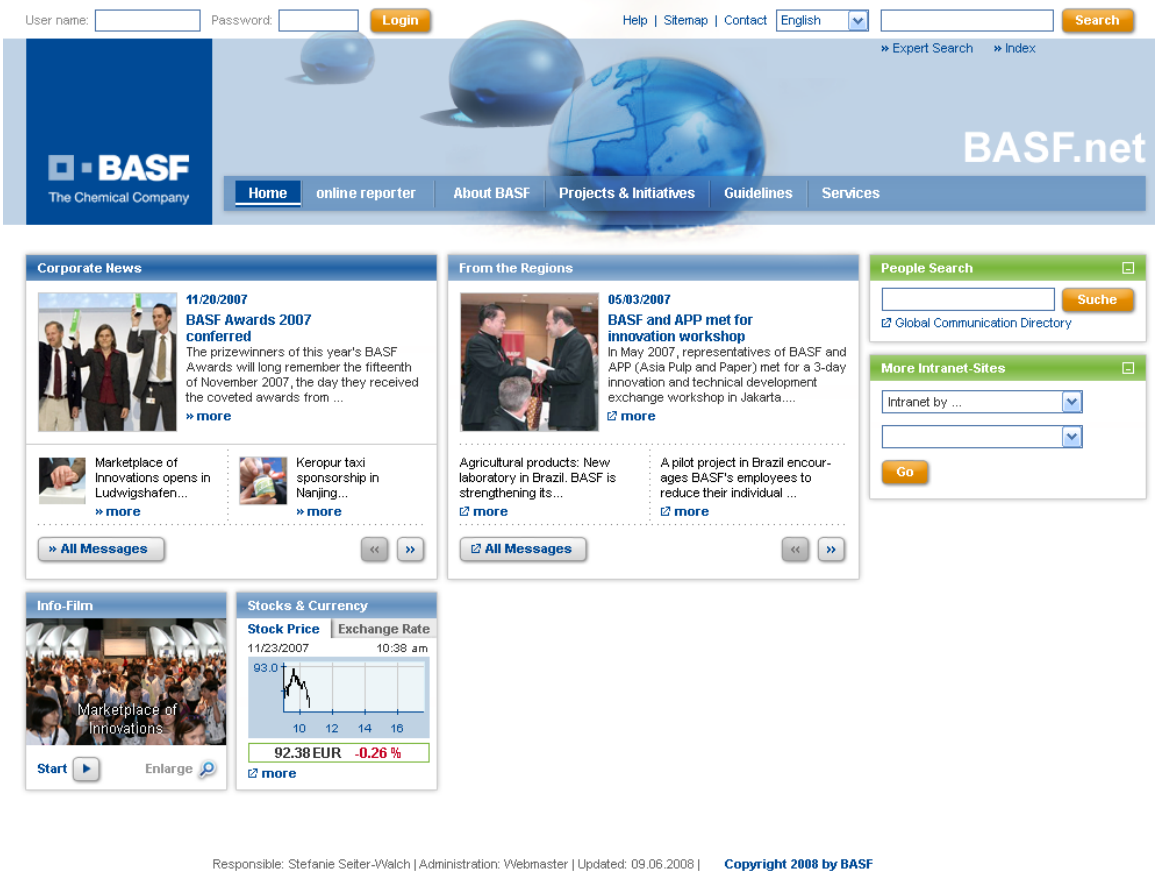
10 Best Intranets: BASF SE



Pictured: Users can select their language of choice from a drop-down list at the top of the page. The entire intranet is translated into the corporate languages (English and German). Static elements, such as menus, can be translated into 11 other languages as well.

The homepage also has a logged-out mode that defaults to the intranet's standard elements, removing all personalization.

10 Best Intranets: BASF SE



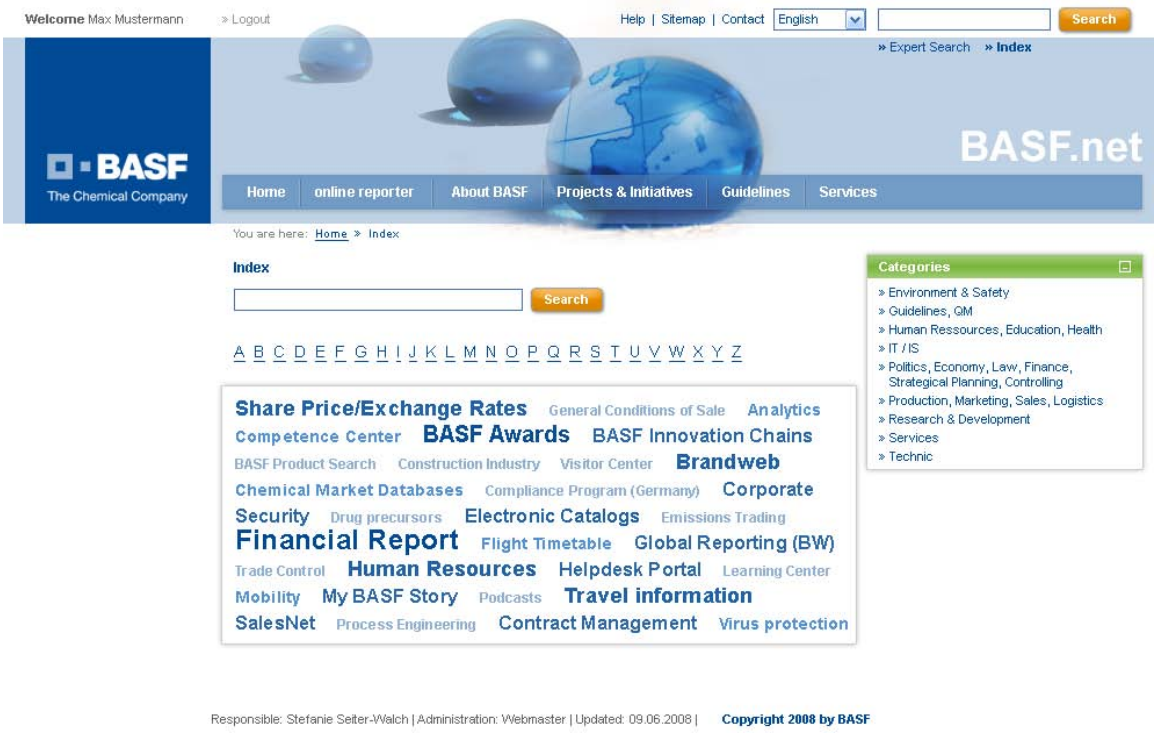
Pictured: The logged-out version of the homepage removes all user-personalized elements.

Users can navigate BASF.net in several ways. In addition to the site search and simple persistent global navigation, users of BASF.net are offered a less common form of site navigation: an index or *keyword cloud.* This feature is somewhat like an index, site map, and scoped search all combined and taking steroids, along with a few truth pills and a small hit of acid.

Clicking the *Index* link directly below the site search field opens the keyword cloud. The cloud displays the intranet links that have been clicked the most by the entire user population. The larger a keyword's text size, the more frequently it has been clicked. The idea is that great minds think alike, and employees need and want similar things. So, if a link is big, it might be the one users want.

Users who don't like the suggestions of others—or who prefer a UI with a more linear structure—can use the alpha list option above the tag cloud to select topics by first letter. Alternatively, they can select from the *Categories* on the right. Finally, users can even search the index itself.

10 Best Intranets: BASF SE

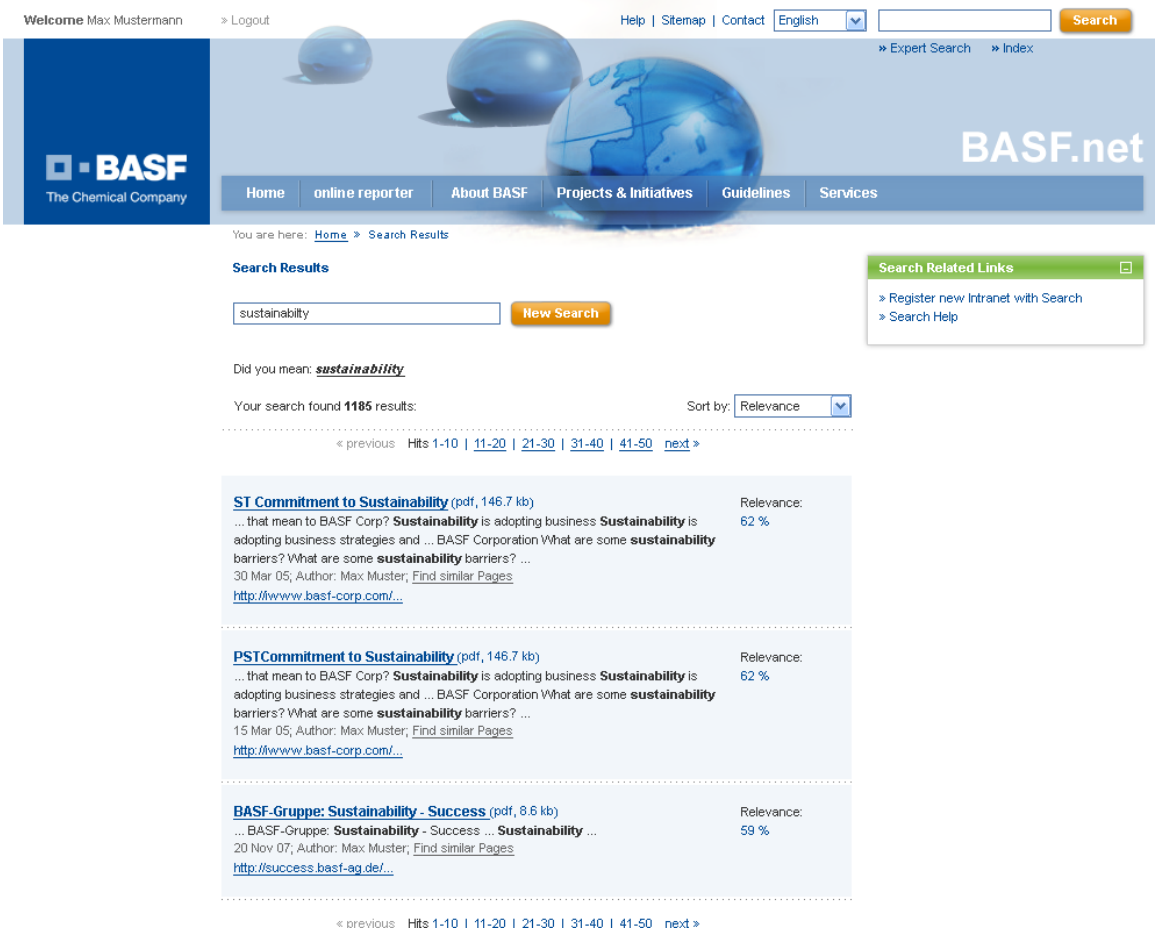


Pictured: The keyword cloud does some work for the user, making the most-clicked links larger, bolder, and more prominent. The feature also offers alternative user interfaces: the alpha list above the cloud and the categories on the right.

More traditionally, a site search appears in the upper right of every intranet page. The search results page is presented very succinctly. The query is repeated, and users have the option to search again. They are also offered help in the form of another word that is spelled similarly. The number of results found is clearly stated, and results are sorted by relevance; users can also sort by other criteria, such as date. The page shows 10 results by default, and users can navigate the results pages via *previous* and *next* buttons, or number ranges (such as *11–20*).

In the results themselves, the words in the query are bolded. The document's title is clear and underlined. Some of the article's text appears, helping people users decipher a bit of the content. The page's URL appears last, in case the page location might make a difference to the user. The *Find similar pages* link can also assist people in their hunting.

10 Best Intranets: BASF SE



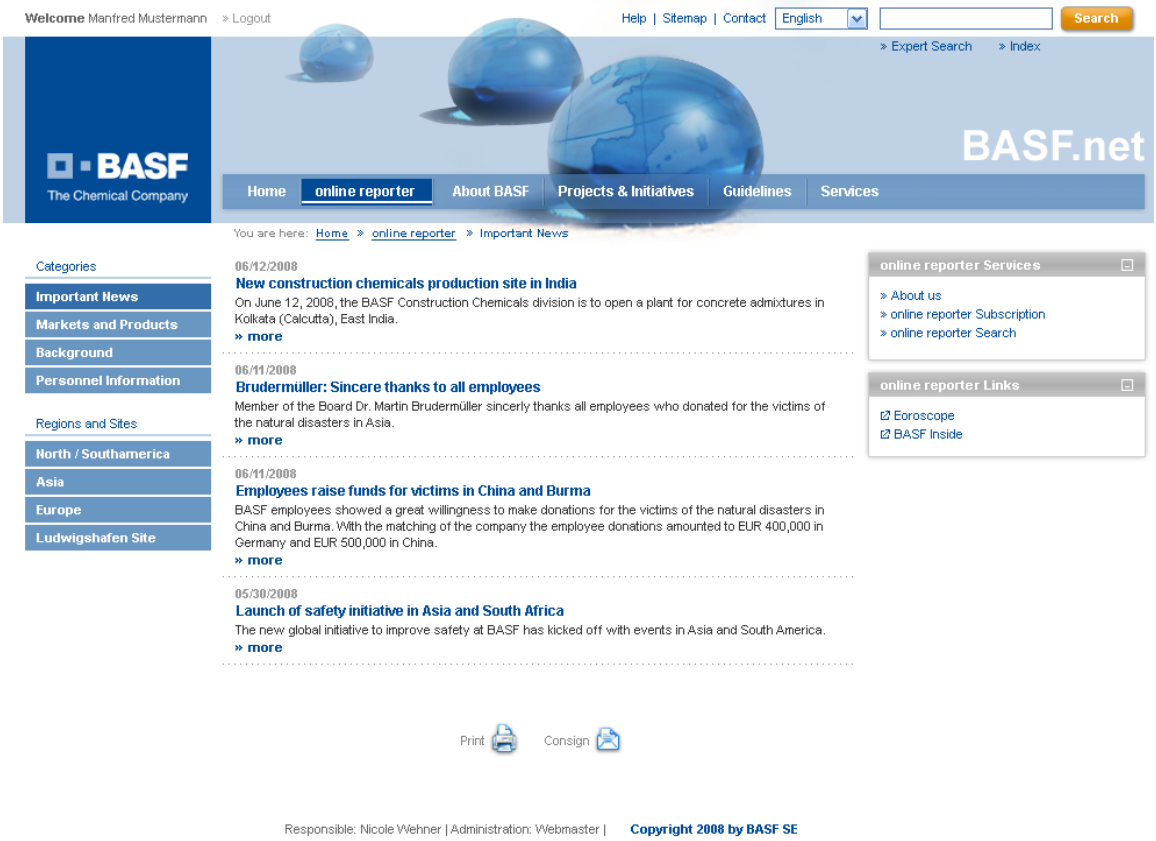
Pictured: The search results are presented simply and according to expectations. The relevance sorting and simple titles as links are just a two of the elements that help users deal with their search results.

Drilling into the content, users can choose the *Online Reporter* link, which is the second menu item in the global navigation. The news in this area comes from a group-wide internal online news medium, and caters to everyone at BASF. In an effort to unify the organization and the intranets, this group relinquished its own separate intranet for the greater good, and now has a top position on BASF.net.

Important News is the default selection in the left-hand context menu. Users can also choose news categories such as *Markets and Products*, *Background*, and *Personnel Information.* The *Regions and Sites* are also listed as news category links; clustering news in these two categories makes scanning the menus easier for users.

In the page's right column, users can access other services through the *Online Reporter* group, which produces the news.

10 Best Intranets: BASF SE

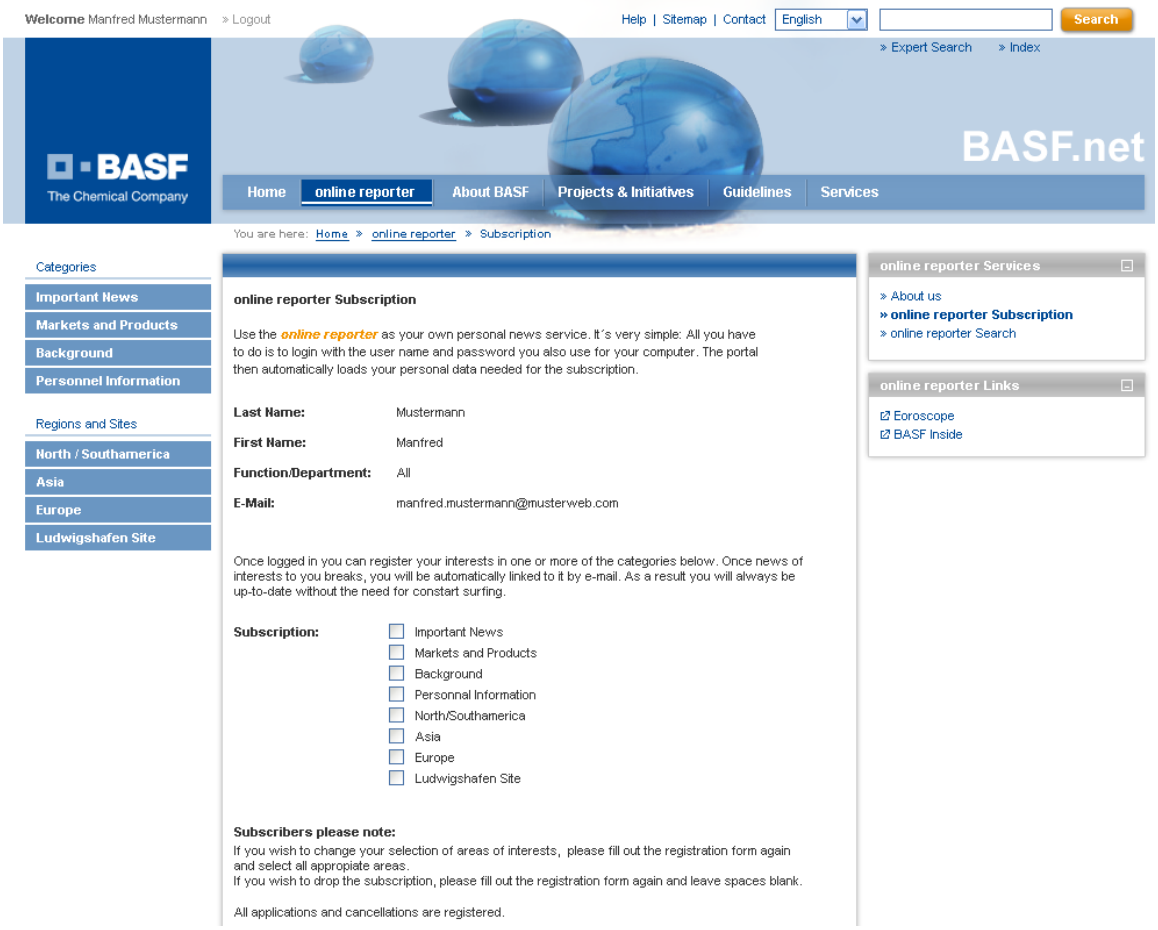


Pictured: Most important news is displayed by default in the site's *Important News* area. Plus, categorizing the menus by topics makes finding the news easy.

One such service in the *Online Reporter* area is news subscriptions. For users who are particularly interested in topics and don't want to have to go looking for the latest news, having a subscription can be like having elves do the work for you.

Choosing the *Online Reporter Subscription* link in the right column displays a page that lets users choose topics. The page first shows users' personal information—name, e-mail address, and department—based on their login. The page then describes what will occur: "*Once news of interest to you breaks*, *you will be automatically linked to it by e-mail. As a result you will always be up-to-date without the need for constant surfing.*"

The bold-face *Subscriptions* label anchors the eight subscription category choices. Users can select as many checkboxes or subscriptions as they'd like to receive. Later, they can opt out if they find they're getting too many e-mails.



Pictured: Users can select from a list of news subscription categories.

BASF.net not only supports efficiency for each user's daily work, it also ensures that "BASF – The Chemical Company" can be experienced online as a truly global brand.

BACKGROUND

Since its beginnings in the 1990s, the BASF intranet grew steadily but in an uncontrolled manner. "The corporate intranet did not meet the requirements of BASF as 'The Chemical Company,'" says Julia Buchner, project leader in Corporate Communications BASF Group. "It faced considerable usability problems, resulting in a loss of productivity in the everyday use of the intranet. Changed working conditions or user behaviors have not been taken into account."

The site was far behind what the intranet team knew to be current industry standards. And it was not properly conveying the BASF brand. The intranet had grown into a conglomeration of many individual sites without clear structures and hierarchies. "From a technical point of view, the real challenge for BASF was to deliver an easy-to-use and customized interface to perform daily job activities on a global scale," says Buchner.

The redesign project goal was to set up a BASF-wide intranet portal with one worldwide URL. The design team wanted to give the site a unique look and feel, as well as offer employees personalized content and tools. Together with the regions

and business units, the project team developed a comprehensive concept for the BASF intranet and one that would guide the company's future online endeavors.

INTRANET TEAM

Team

The project team was created in 2006 after the project was officially approved. In addition to the core team, regional and functional online communication colleagues participated in the BASF.net project. Buchner says the global technical rollout was also successful thanks to the diverse local and regional IT colleagues and help-desk units.

The BASF global intranet (BASF.net) core team consists of 11 people (three from an external agency).



Pictured: The BASF.net project team (from left to right, seated): Beate Zissel, Julia Buchner, Bernd Schabacker; (from left to right, standing): Marian Möhren, Bernward Schuka, Vladimir Mello, Gerald Ebisch, Oliver Schröpfer; missing: Claudia Lindner.

Governance

Responsibility for the BASF intranet is shared between Corporate Communications and the global Information Services Unit. Corporate Communications is responsible for the intranet governance, design, and content, as well as branding alignment and further conceptual developments. The global IT department is responsible for

technical support and related development. This ownership model has been successful for the past several years.

The corporate intranet staff comprises three professionals (based in the company's headquarters in Germany). However, being a multinational company, the intranet governance extends to the regions where BASF operates (Europe, Asia/Pacific, North America, and South America). On a global scale, BASF has about 50 communications experts dealing with online communications.

These communications experts are either website owners or content owners of a specific intranet website within the BASF intranet. Their role is to create content, monitor published content, and remove outdated information or broken links immediately. As central website owners, they're responsible for search engine registration, definition of access restrictions, and provision of statistical evaluations (Web controlling).

"Whereas Corporate Communications is responsible for any online content on BASF.net, the group's intranet portal, the regional, local, and functional website owners take care of their respective online content," says Buchner. "In this way, inquiries regarding their content can therefore be made directly to the respective content editors."

BASF's Online Governance is handled by the Communications Excellence Team, which defines standards of excellence, coordinates procedures, and shares best practice examples with the BASF global communications community. It was created in July 2007 and meets bi-monthly via telephone conferences and holds a yearly face-to-face workshop. The team is made up of 15 online communicators and IT experts from the regions, divisions, and from Corporate Communications.

"The aim of this team is to define and discuss group-wide requirements for online topics," says Buchner. "The team also issues recommendations on measures and processes that are congruent with the vision of the BASF brand and BASF communication goals." Through this process, the team develops guidelines, tools, and globally applicable standards contributing to a consistent group-wide presentation of the BASF brand. The team uses networking to: share best practices, utilize online communication synergies, and detect and evaluate online trends early on.

BASF IT Services handles the intranet's technical support and maintenance, while the company's global Information Services Unit supports its long-term IT governance. "The further development of the group intranet portal is controlled by an Intranet Steering Committee, bringing together the management of the three involved parties on a monthly basis," says Buchner.

Working with Agencies

Beginning in 2005, the BASF.net intranet was developed in partnership with the agency Pixelpark AG. Pixelpark supported BASF´s Corporate Communications department in developing basic concepts and strategy for the site. In addition, Pixelpark was responsible for all design and IA-related tasks during the project. The agency was part of the core project team and was responsible for design development. Working closely with BASF IT Services, the internal service provider, the agency was heavily involved in the technical project definition as well.

GOALS

The BASF.net was intended to aid the company in establishing a worldwide communications and information medium. As of go-live (September 2008), there

was one global intranet homepage for all employees—in all units and group companies that operate under the BASF name and brand—for the first time since the company established an intranet.

The site's main goals are to:

- Make the intranet a management tool to disseminate information group-wide.
- Provide a means for an effective BASF-wide knowledge exchange.
- Establish a dialog-oriented company communication with a strong brand experience.
- Improve efficiency and create value-added for the target group.
- Provide "joy of use" through a high degree of usability

TIMELINE

The redesign project for the new BASF intranet began in early 2006 and had a go-live date of September 2008. The project period encompasses the entire project lifecycle, from concept to rollout. Following are the project's main milestones.

2006: New intranet (structure and design definition)

This new structure was developed together with regions and business units. The project unofficially started in July 2005 with a detailed analysis of the former corporate intranet. The Corporate Communications unit organized an online survey to get an overview on how employees worked with the existing BASF intranet and which improvements were needed to reshape and improve it.

In addition to the users' responses, Corporate Communications conducted usability testing of the former intranet in cooperation with the Fraunhofer Institute for Industrial Engineering. This usability walk-through identified several tasks that would enhance the user orientation and thus improve the corporate intranet.

"Finally," says Buchner, "we met with several other companies in order to get to know best practice examples and lessons-learned from intranet projects they had recently gone through."

"After gathering and evaluating all information, we did a pitch for hiring an agency that would support us in the concept and design development, which turned out to be Pixelpark Agency (Cologne)."

The concept phase ran from November 2005 through March 2006. Then the design and layout development were finished in late summer 2006 through a joint process with the online communicators in the BASF regions and business units. "At a very early stage in the design development, we shared our drafts with the colleagues in the Communications Community in order to get their feedback and further develop the navigation and design concept," says Buchner.

October 2006: Approval for group-wide rollout of intranet portal concept

The Brand Advisory Board (a steering committee that typically meets four times a year and includes members of BASF's Board of Executive Management) officially approved the new intranet concept. Buchner says that "having the approval of this Committee allowed us to set up an official group-wide project and move on into the next project phase" which included a feasibility study and technical implementation.

April 2007: Official technical project approval

According to Buchner, IT-related projects at BASF that exceed a given budget amount need the approval of Commission I. This committee, composed of the heads of the BASF business units, decides on future investment projects within the

company. As a joint project between Corporate Communications and Information Services, BASF.net went through this approval process and got allowance for further development and technical implementation.

June 2008: Technical implementations and IT optimizations complete

BASF IT Services was the preferred service provider and conducted the feasibility study and the technical implementation. Due to performance problems with the IT hardware and software, the project go-live was postponed from March 2008 to September 2008.

August 2008: Final intranet testing phase complete

The testing phase consisted of several different tests. The technical load and performance tests of the hardware and software started in October 2007. The unsatisfying test results led to the decision to postpone the go-live of BASF.net, which was originally planned for March 2008. The second tests were functional tests targeting all functions developed for BASF.net. The functional tests were ongoing throughout the technical implementation period. They ended in summer 2008.

During integration testing, the testing group was expanded to include 50 users on a global scale (mainly from Communications and IT units). The aim of the integration test was to find out if the functionality of BASF.net would work in different regions and diverse network situations. It was also aimed at checking all BASF.net content and translations. The integration tests took place between August and September.

September 18, 2008: Go-live and global rollout of BASF.net

The go-live of BASF.net started with a rollout in Ludwigshafen, the company's headquarters. Employees booting up their computer on September 18th saw a *Welcome* start page, which allowed them to enter their own personal settings on BASF.net. In addition, a Flash animated guided tour explained the structure, contents, and functions of the new intranet. The *Welcome* screen was available in 13 languages and the guided tour was offered as an audio and non-audio file.

The *Welcome* page is still accessible on BASF.net help pages for any new employee working with BASF.net. The technical rollout of BASF.net continued to all BASF regions through October 10th. "BASF employees all around the world received the intranet portal, which is standard across the group as their homepage in Internet Explorer," says Buchner.

USERS

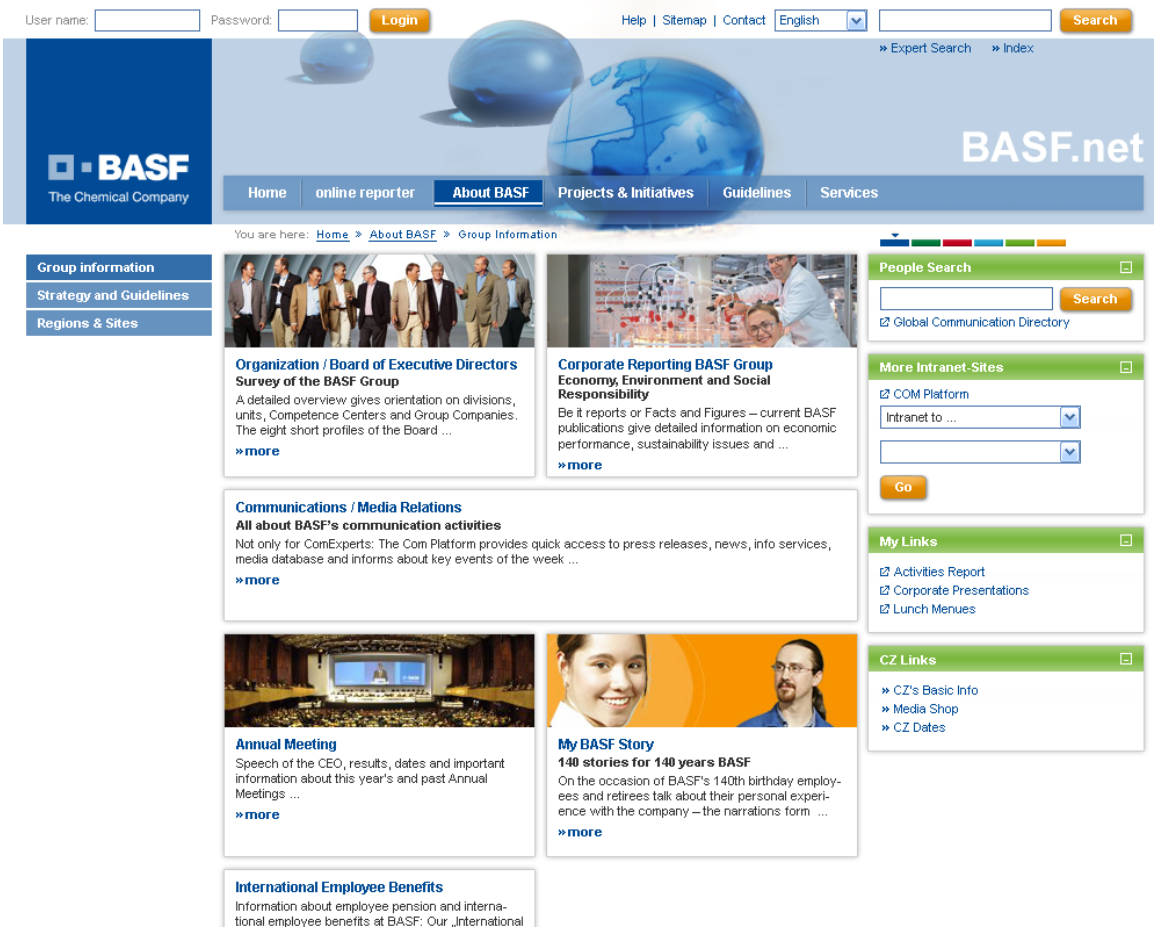
BASF.net users come from all hierarchies and all functions across the entire BASF Group. From apprentices and office assistants, to production workers, scientists, and managers, to members of the Executive Management Board, user interest in BASF.net is very diverse.

USER TASKS

The primary tasks that users can accomplish on the site include:

- Access news (global, regional, and function-related)
- Search staff directory
- Search work-related information via keyword index and global intranet search
- Access all sub-intranets of the organization through a single gateway
- Quick access to favorites pages (for example, local lunch menus or HR services)

10 Best Intranets: BASF SE



Pictured: An overview page. These pages can be filled with different teaser formats according to content requirements. Teasers must, however, stick to a certain page grid to provide a measure of visual clarity (for example, teasers next to each other must be the same height).

10 Best Intranets: BASF SE



Pictured: A regular content page. Content modules can contain all types of content, including articles, forms, illustrations, and embedded applications. This screen also illustrates how the design displays deeper navigation levels in the sub-navigation column.

DESIGN PROCESS AND USABILITY ACTIVITIES

Goals of the Redesign

The main goals of the redesign project were to:

- Set up a consistent, global intranet for all employees worldwide as a single source of information and single point of access to all important applications, features, and sub-intranets
- Build a platform for internal communications to quickly reach all employees worldwide and speak with a one-voice policy
- Develop a highly usable, user-friendly intranet with a fresh design
- Simplify the accomplishment of the most common intranet tasks within BASF

"The decision to re-launch the corporate intranet was taken because BASF felt that the old site did not tap the full potential of an intranet and did not fit the leading edge claim of 'The Chemical Company' in terms of state-of-art technology combined with a dialog-oriented approach to new media," says Buchner.

But, to address the site's shortcomings, the team had to get a sense of what worked and what didn't. Prior to undertaking usability research, they conducted an initial survey and user interviews.

User Survey

"At first we conducted an online survey asking the users what features they used most on the intranet and how they rated each of the existing features, the layout, and usability of the old intranet," says Buchner.

The survey revealed that the most-used features were: people search, general intranet search, HR services (on a sub-intranet), news notifications, and navigation to different sub-intranets (divisions sites, for example). "However, many users criticized the search results, the lack of orientation, the lack of visual clarity, and the poor usability and navigation within the intranet," says Buchner.



Pictured: The homepage of the BASF corporate intranet prior to the site redesign.

User Interviews

Prior to beginning the design concept, the team interviewed many key intranet players within the organization—including communicators, information managers from different divisions, and editors of internal online news media—and asked them about their requirements and wishes for the new intranet.

"We found it extremely important to already involve all these people at this early stage because it prevented anyone from feeling excluded," says Buchner. "This was

especially important because the intranet would rely on the support and cooperation of the key stakeholders in the regions and divisions who act as multipliers for their fellow employees worldwide. Talking to many people at the beginning was quite an effort, but it was worth every minute because we gained broad support throughout the entire organization."

Usability Methods

In addition to involving users through the organization-wide survey and stakeholder interviews, they also conducted more traditional user research. The following activities proved helpful for guiding them as they set up the content and navigation structure. The testing described below also helped them figure out which design worked best for some of the required features.

Heuristic evaluation. The design team, in cooperation with the Fraunhofer Institute (Competence Center Human-Computer Interaction) in Stuttgart, Germany, conducted an in-depth analysis of the old intranet, evaluating factors such as content, navigation, user orientation, information retrieval, and the usability of important features. They also looked at how easily users could perform the most important intranet tasks (such as finding a colleague's phone number).

"This evaluation revealed important problems such as: incoherent navigation architecture, lack of clear entrance points for different users, cumbersome completion of intranet tasks, and confusing layout—80% of the space was covered by link lists and animated banners," says Buchner.

Card sorting. The team performed a card sort with key users to figure out a good content structure and develop understandable navigation wording. "As usual, this was a tricky task," says Buchner, "But the card sorting results of the BASF employees helped very much to find a reasonable solution as we learned how they would intuitively structure and name the different contents."

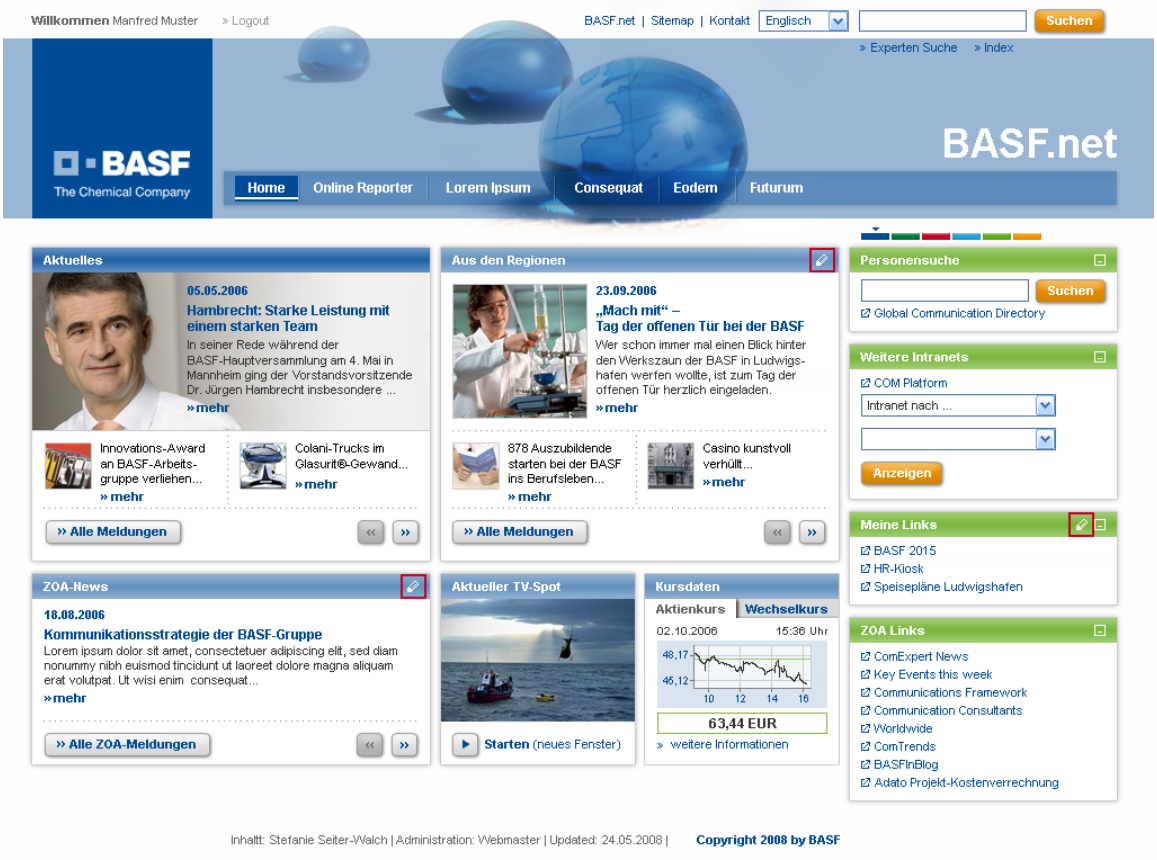
"All in all, we had about 15 people doing the card sorting: 10 employees from different divisions and hierarchy levels, and five or six people from outside BASF," says Buchner. "In the first session, people did an open card sorting, establishing and naming categories themselves and assigning all cards to these categories. We then established five fixed categories in a second session and had people assign all cards to these categories and had them rename the categories if wanted."

Paper prototyping. The team used paper prototypes to test proposed site versions with different employees. The design team wanted to find out which design alternative worked best with most of the users, particularly certain features. "These paper prototyping tests were a great success," says Buchner. "They produced both good results and a good feeling among the employees as they felt involved in the design process."

"Overall, we had 12 employees performing the paper prototype test with us: six women and six men, all from different departments, different job levels, and of different ages," says Buchner. "We wanted to find out the best alternative of a few items whose design had been controversially discussed within the core team—such as the highlighting of the main navigation items and the use of icons or text links for the editing functions on the homepage."

In the test, the team used two versions of each item and had half of the users perform tasks with the first version and the other half with the second version. "We decided on the method of paper prototyping because we figured it was a good way to give us valuable results on the controversial items with relatively small effort," say

Buchner. “Testing with a clickable dummy would have needed more time and effort, which didn’t abound at this stage of the project.”



Pictured: An older version of the BASF.net homepage used for a paper prototyping test. In this example, the team tested the *Edit* icon in the top bar of some of the boxes.

URL AND ACCESS

The BASF Group intranet’s URL is www.basf.net. It is bookmarked in users browsers and is the default homepage for all employees worldwide operating under the BASF name and brand (except locations with small bandwidth). The user can’t change the settings.

Remote access is available via VPN.

TECHNOLOGY

The BASF intranet is built on SAP Netweaver, which provides all necessary functionality, including modules for content management, a search engine, a Web application server, user management, and databases.

Metrics are tracked with WebTrends.

Kiosks are available for employees without access to PCs and/or who don’t work in offices. The kiosks are used mainly for *Employee Self Services* (HR processes), which are all supposed to be done electronically. The kiosks are available especially in the production plants.

MOBILE

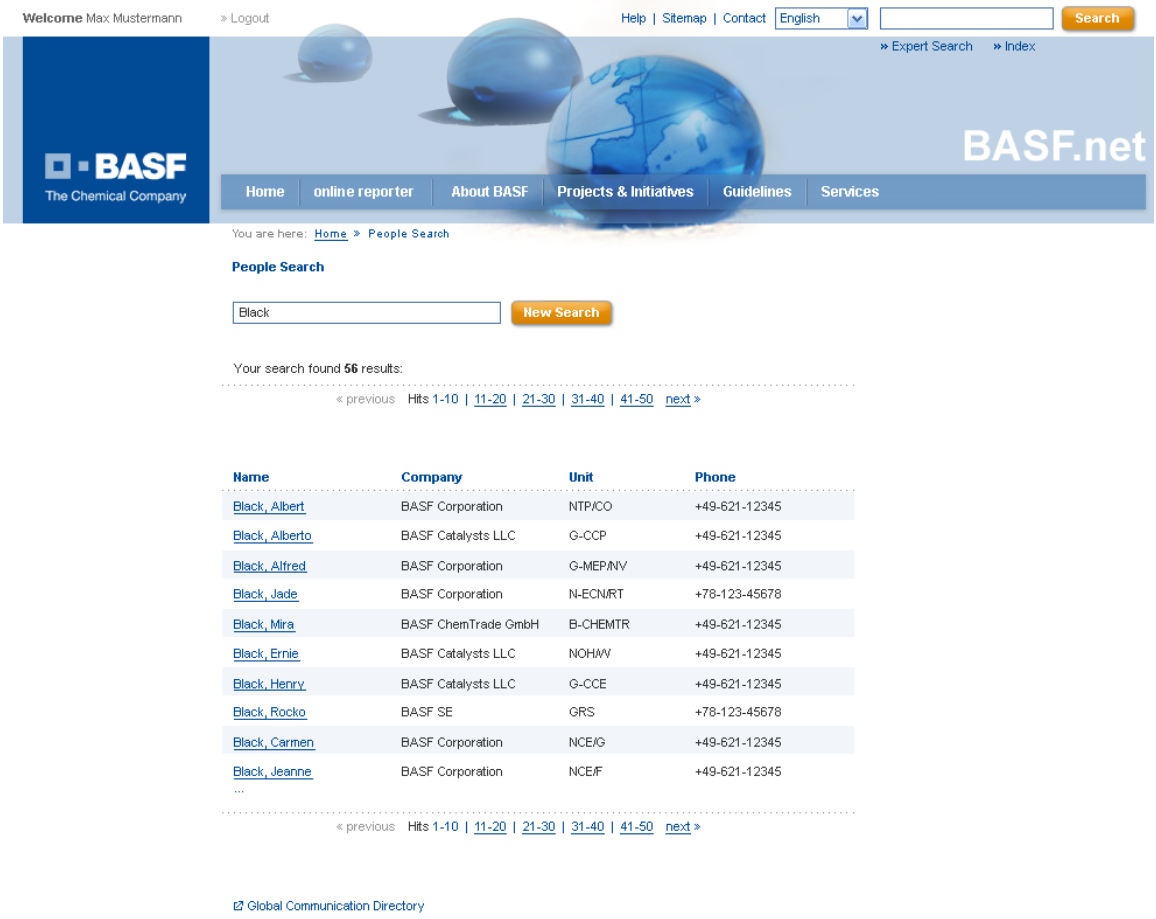
The BASF Group intranet is not currently optimized for mobile devices, but Buchner says that making BASF.net available for any mobile device is a likely future step.

SEARCH

The site's search engine is SAP Netweaver TREX, with exact-, linguistic- and fuzzy-search methods. The intranet search engine crawls about 150 BASF websites globally for public content. These documents are available on the intranet.

The new TREX search engine browses about 2.5 million public documents, including MS Office documents stored in Documentum repositories. "In this way, the amount of searched documents raised three times in comparison to [Verity] the former intranet search," says Buchner. Currently, the TREX search has indexed more than 170 internal Web and portal appearances. Whereas the former intranet search was rather regional—crawling European Web content, for the most part—BASF´s internal online landscape is now searched on a global scale.

Now that the new search engine has been launched, Buchner says the next step is to improve ranking mechanisms and tracking criteria.



Pictured: This screenshot shows a *People Search* results page launched from the homepage's *People Search* module. It searches BASF's global phone book, the Global Communication Directory, which is a stand-alone intranet application, and displays the search results directly in BASF.net.



Pictured: The incremental search function on the index page. While typing, the system automatically shows clickable keyword suggestions that match the user's entries.

CONTENT MANAGEMENT

The site's content management tool is easyWCM, which is based on SAP Netweaver Knowledge Management. BASF customized the tool according to its needs.

The Content Lifecycle

Each document on the site has a lifecycle and a version. Documents older than six months are automatically flagged and the author receives notification to check the content's validity and update it if necessary.

Content is edited via an online editor. The author navigates through the Web to the relevant page and clicks on a pen icon. The document is opened by the CMS within the WYSIWYG templates. The content is stored as XML and automatically published using a time-based publishing mechanism.

The team developed templates for defined content types—including distribution pages, article pages, teaser elements, and context elements—with defined content modules. "Design guidelines are described in our intranet style guide and are being respected by the CMS templates," says Buchner. This lets editors put content online without caring about layout; all layouts and templates fully conform to the site's style guide.

Style Guide

"The new intranet style guide was initially created as a single document serving as a pattern for the developer team of BASF.net," says Buchner, adding that this pdf file

"contained all templates, modules, and dimensioning used for the new group intranet." However, as Buchner notes, while the graphical design was developed generally for all new intranet sites within the company, the style guide was intended as a living document that could be expanded according to new requirements from division or regional intranets and the like. Ultimately, however, it proved too cumbersome to keep the pdf document up-to-date and ensure that everyone was using the latest version.

"So, we decided to set it up online as a website," says Buchner. "Everyone who accesses it, automatically gets the latest version, and it can be edited and expanded easily. So far, more than 10 intranets within BASF—other than BASF.net—already adopted the new intranet design in 2008, and more will follow."

Content Editors

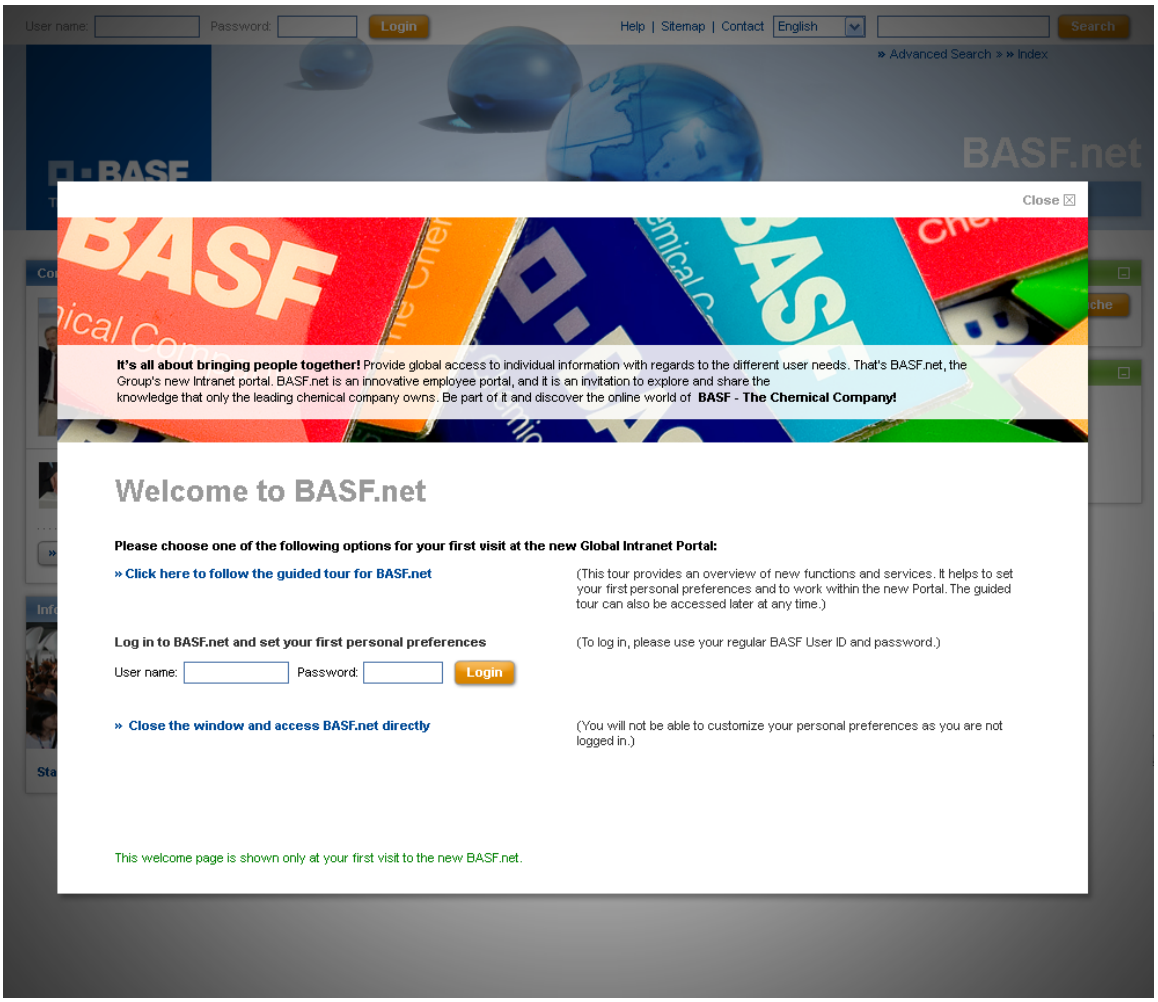
"So far we have about 50 different content editors for specific parts of the new BASF.net," says Buchner. "The target group is mainly formed by regional and divisional communication experts located worldwide. The corporate content is the responsibility of the Corporate Communications department based in Ludwigshafen. The global editor group is supposed to grow steadily, as it is our plan to incorporate and integrate further websites to BASF.net."

FEATURES

Following are some key features of BASF.net:

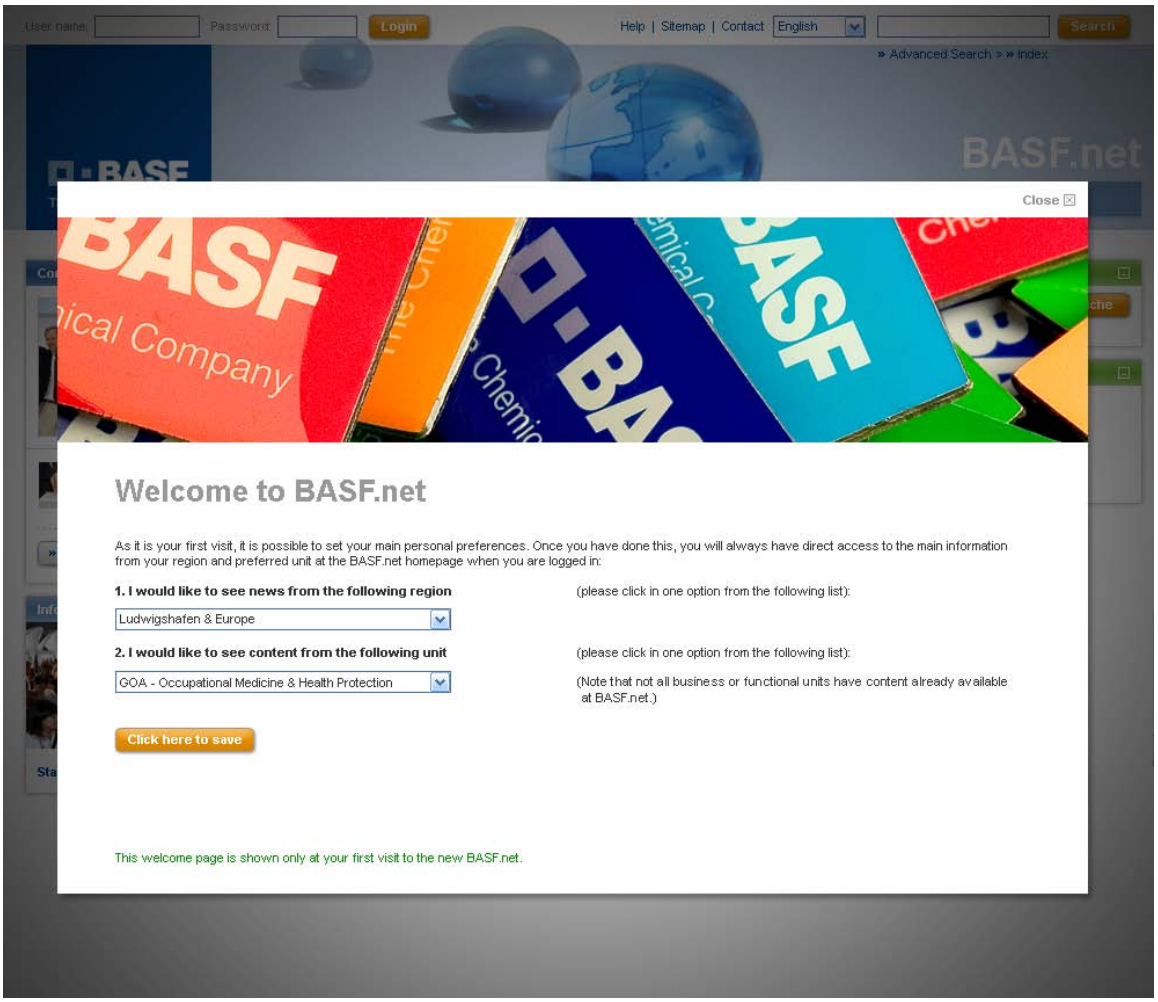
***Welcome* screen.** When users visit the site for the first time (and only the very first time) they see a *Welcome* screen where they can either access the guided tour (see below), log in and enter their customization settings, or simply access the portal without logging in.

10 Best Intranets: BASF SE



Pictured: The initial *Welcome* screen pops up as a layer over the BASF.net homepage the first time—and only the first time—a user visits the new portal.

10 Best Intranets: BASF SE



Pictured: The *Welcome* screen after the user logs in directly. In this case, users can set their initial news preferences for both region and division.

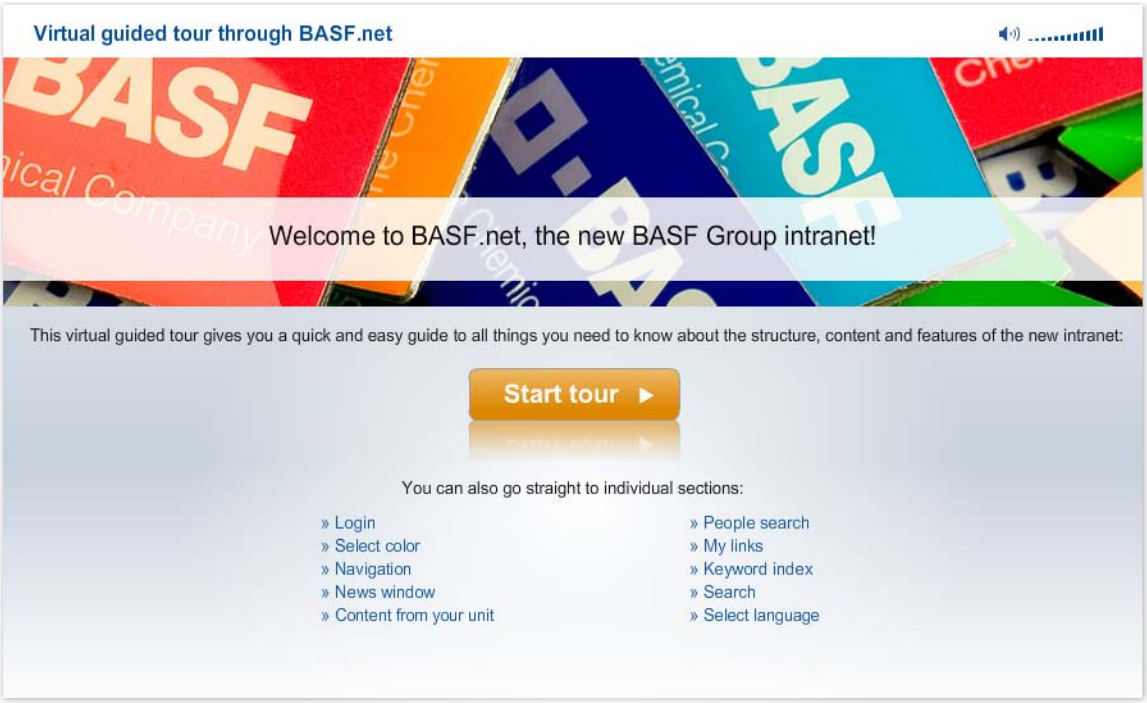
Customizable news boxes. Users can select which region and division they want news from using simple dialog settings.

Administration of personal bookmark list. In the *My Links* box, users can edit or delete existing links, add new links, and choose links directly from the keyword index and add them to their personal bookmark list. This customization works via an easy-to-use dialog box.

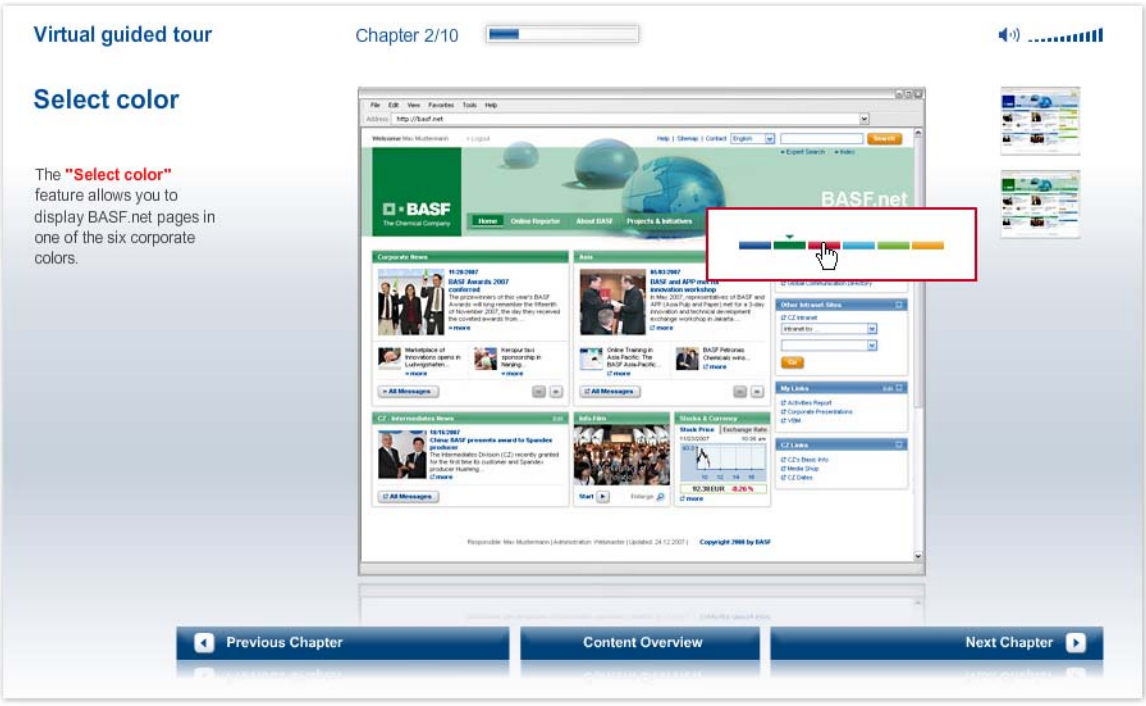
Keyword index using tag cloud and incremental search. The keyword cloud shows those index entries that were clicked most often by intranet users. The larger a keyword, the more often it was clicked. The index can also be browsed alphabetically, using the letter navigation or categories. The index has its own search and offers incremental search suggestions while the user types. The index contains global entries as well as regional entries according to the selected region.

Guided tour. The intranet team produced a guided tour in six languages explaining the new intranet portal and all of its main features. This Flash application runs in a layer on top of the BASF.net homepage.

10 Best Intranets: BASF SE



Pictured: The start page of the guided tour.



Pictured: A content page within the guided tour.

Subscription for *Online Reporter* messages. The *Online Reporter* is the internal news medium that publishes all BASF.net news messages. Employees can subscribe to news from one or more categories and receive news via e-mail.

Color picker. BASF has six corporate colors of equal value. The color picker allows users to view BASF.net in their preferred color pattern. User defined settings are stored and present upon return visits to the site.

Collaboration Tools

BASF.net is in the beginning stages of adopting a holistic portal approach. In an upcoming phase, the team plans to enhance collaboration tools and knowledge management features. "The long-term goal of BASF´s portal approach is to step-by-step integrate further intranet websites and business applications, enhance personalization levels, and thus make BASF.net a truly working place of the future for BASF employees," says Buchner. This vision of a global IT "harmonization" process is targeted for 2012.

Currently, collaboration and knowledge management take place on sub-intranets—on a divisional or project level—rather than on the corporate intranet. Some of these sub-intranets have already adopted the new intranet design and provide further communication possibilities and team rooms for easy file sharing.

LESSONS LEARNED

Some lessons learned from Julia Buchner and the BASF.net project team:

- **Politics matters.** "The launch of a group-wide intranet portal for BASF was a change-management project and needed a lot of political discussions in order to get the acceptance from different stake holders within the company. A detailed analysis at the beginning is crucial in order to convince your top management. It's also important to identify the weak points and turn them into future success factors."
- **Communication matters.** "A transparent and continuous communication to the global communications community, as well as to the employees, is important in order to bring them on board for this global and long-term project."
- **Learn to talk the talk.** "You cannot perform such a project without diving deeply into IT-related topics. In this way, it is a challenge for all communication experts who take over the role of a project leader without having in depth IT knowledge. We all know that communication via online channels plays a decisive role in today's employee communications. And communicators have to handle much more IT-related projects than in the past. So, when it comes to a global portal project, you cannot just elaborate the concept and provide design and content, hoping that IT colleagues can handle all obstacles that may rise on their own. Already, at a very early phase, the project leader—in our case, the communication department—was involved in all IT discussions (for example, the bandwidth situation, infrastructure harmonization efforts, and URL domain concepts). In this way, it is a challenge for all communication experts who take over the role of a project leader without having in depth IT knowledge. Especially when it comes to misunderstanding caused by specific IT language. Communicators have to learn that IT jargon is completely different—and quite difficult, due to abbreviations and specific wordings. The communication flow between IT experts and communicators needed in our case some 'translation help' in order to bring all involved parties on the same page. On the other hand, IT colleagues had to understand that communicators are driven by fulfilling functional user requirements without caring about the technology behind it."

- **Launch a beta.** "Technical obstacles never show during the 'proof of concept' phase. They always show up when the implementation phase has already been finished and the testing period starts. So, never communicate a go-live date to a broad public. It could be that your project gets delayed due to technical constraints."
- **Communicate with the users.** "User requirements continuously change, especially in online communications. You cannot respect all optimization wishes you might have received by the employees—such as in a user survey. But it is recommended to keep them informed about the different project phases and therefore control the user expectations."

RESULTS/ROI

Like many intranet projects that are in the early stages of launch, the BASF.net intranet does not have any hard measures of its performance. The organization instead looks to accomplishment in terms of user tasks to gauge the site's success. For BASF, these include:

- The BASF corporate intranet has changed from a static HTML-based intranet website to a dynamic intranet portal.
- Users can now customize contents and set their preferences.
- The global electronic news medium (*Online Reporter*) is fully integrated into the portal and thus users can easily access the latest global, regional, and divisional news.
- Employees can also choose the corporate color they prefer for their own BASf.net homepage.

Management Wins

For the management team, the intranet represents some significant wins in terms of meeting specific organizational goals through employee use of the site. These include:

- Cost reduction due to a global technology approach.
- Efficiency enhancement, thanks to better usability and information retrieval.
- A management tool for global communication that adheres to the "one-voice" principle.

COWI Group A/S

Using the intranet

COWI is a leading international consulting group in the fields of engineering, environmental science, and economics. Since its founding in 1930, it has been involved in more than 50,000 projects in 175 countries. COWI employs 4,700 employees, including engineers, biologists, geologists, economists, surveyors, anthropologists, sociologists, and architects.

COWI leads some of the world's largest infrastructure projects. It has companies and offices in 35 countries, and project offices in all countries in which it operates.

Number of employees the intranet supports: COWI has 4,700 employees. So far, the portal has been rolled out to 3,000 employees in Denmark, Norway, Lithuania, the US, China, Belgium, and Turkey. Over the next two years, it will be rolled out to the rest of the COWI Group, including offices in Eastern Europe, the Arabian Gulf, and Africa.

Headquarters: COWI is located in Lyngby, Denmark (north of Copenhagen)

Sales: DKK 3,031,381,000 (year ended December 31, 2007).

Design team

Functionality and navigation by COWI staff. Graphic layout by Framfab, developed by Netcompany and COWI.

Members

Jan Johansen, chief project manager; Christine Rübner Hultmann, section manager, knowledge management; Nina Sonne Nikolaisen, knowledge management consultant; Henrik Steen Petersen, head of department; Jørgen Emborg, chief project manager; Jørg Losnedahl, IT manager COWI Norway; Trine Boe, communications consultant; Janne Toft Jensen, group Web editor; Josina Bergsøe, design manager; Arne Hougaard Nielsen, IT director and owner of the COWIportal.

SUMMARY

Consultancies get tremendous value from sharing knowledge among workers throughout the organization. Proposing a project, staffing it with the right people, planning and sharing knowledge and schedules throughout the project, ending the project, and providing history are all fundamentals of the consulting process. And, when the consultants deal with complex issues, it makes supporting them even more important—and more challenging. Expediting such processes will contribute to an organization's success; hindering them could be the end of the organization.

The COWI Group intranet, COWIportal, supports some 4,700 employees based in companies and offices in 35 countries, all working on complicated problems in the fields of engineering, environmental science, and economics. A wide range of users, engineers, biologists, geologists, economists, surveyors, anthropologists, sociologists, and architects, make COWI projects possible. As does the COWIportal, which does a remarkable job of shoring up the consulting process by:

- Working on the backend to personalize the site and show users the information and links they need
- Enabling knowledge sharing
- Targeting project areas for teams
- Communicating details about individuals

Homepage

The COWIportal homepage is a mix of targeted information and user-selected content types. The intranet designers decided to make the homepage suit individual needs so people wouldn't have to go hunting to get their needs filled.

The first news item in a graphic banner showcases one main article. In the example below, the article tells an exciting story about a COWI project manager who's also an Olympic athlete. The headline, summary, and picture of the person draw users in, and remind them of the rich tapestry of people at their company.

The first content section, *News for You*, shows news selected for the logged-in user based on the user's background and work. COWIportal aggregates information from other sites around COWI to find the most important information for each user. The title/link for the news item is telling, and the news item's category appears next to the title, offering helpful context. For example, the news title, "Guidelines for cooperation between the five COWI regions," takes on a new—or at least a clearer—meaning when you see that it's in the *Sales* category. The same is true of the title, "Building the Colossus of Copenhagen," and its source, *Building and Operation.*

The *My selected news* area—which appears to the right of the targeted news—displays titles from the user-selected news subscriptions. Below this area, a link for *How to subscribe to news* walks newcomers through the process.

The *Events for You* section is also targeted to the logged-in user, selecting and presenting events from calendars around the organization. This makes managing days and weeks effortless for users.

The right-most column continues the user focus, showing a user-selected list of sites, such as organizations users are apart of and projects they work on. This area also displays personalized tasks and alerts.

Further, the right column offers a personalized link to the time registration sheet, the travel registration sheet, and, if applicable, the manager's reports. So, when users open the intranet homepage, they can tap into much of what they need to know that day. This fact makes the COWI portal a truly amazing productivity tool.

Looking toward the top of the homepage, we see the logged-in user's name along with personal links to *My Site* and *My Links*. Users can edit these features to share information with colleagues and quickly locate often-used links.

The persistent global navigation is organized into understandable categories. When selected, a section changes from light gray to dark gray.

The *People Search* and site-wide search features are readily available in the upper right of the homepage, and appear on every page on COWIportal. Located together as two open fields is the most usable presentation of these important yet different intranet features.

10 Best Intranets: COWI Group A/S



Pictured: The COWI intranet, COWIportal, acts as a dashboard for users' daily tasks, such as reading targeted news and subscriptions, filling in timesheets, and accessing job-critical links.

News and Writing

The news is written by people in different areas of the organization, and thus is varied and can be fascinating. All news items have a clear title and a helpful summary of the story just below it. This helps users decide whether the story is something that might interest them. Also helpful are the headings within the news article. In the “Building the Colossus of Copenhagen” story, for example, the subheads, “Two decades of planning” and “Staying true to art,” help users understand the section contents.

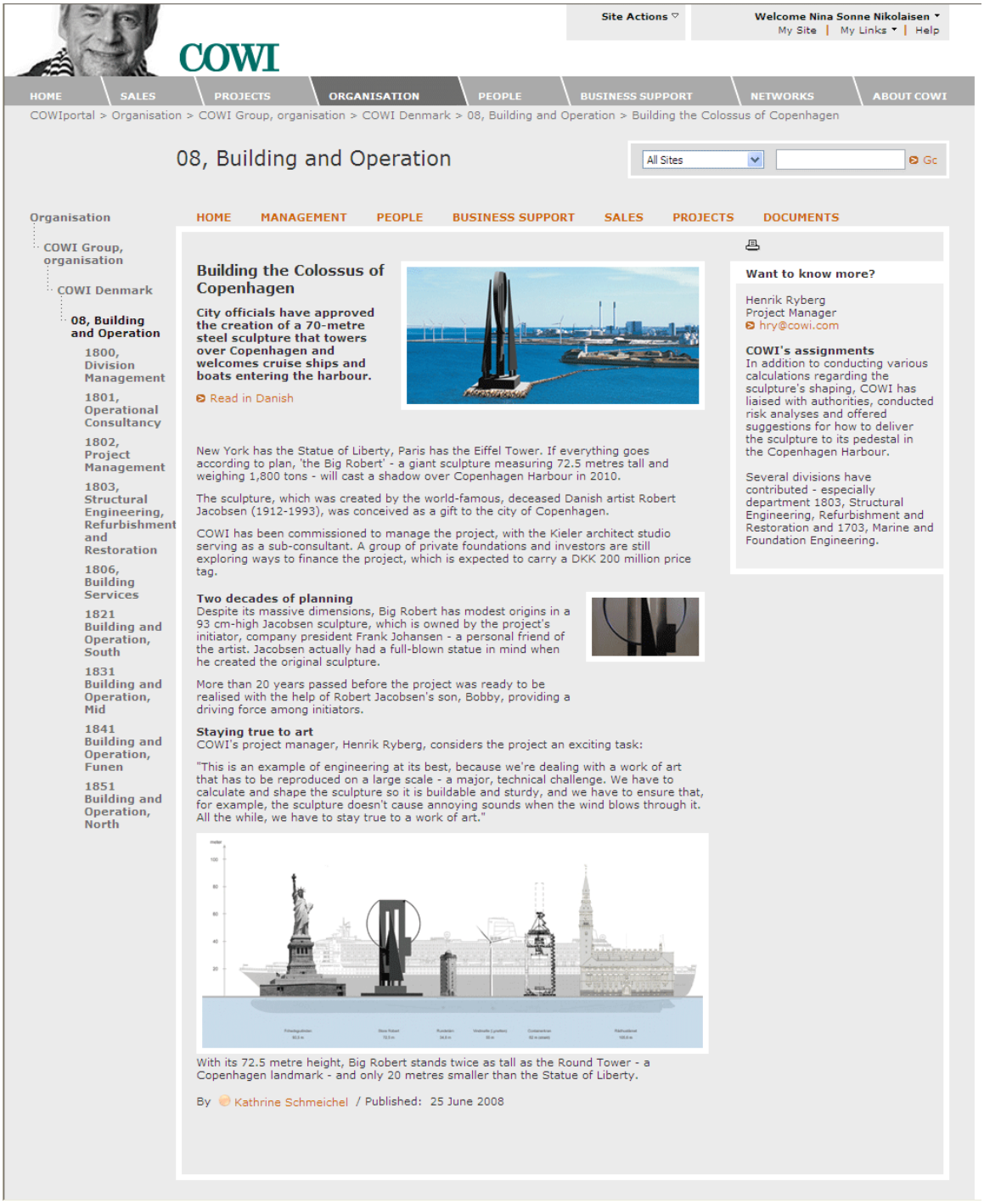
The article’s topic is a high-profile job for both COWI and the Copenhagen skyline. It’s exciting for users to see summaries of interesting and large-scale jobs like this.

Also, the article’s graphics are not lame, stock-type artwork of people pretending to work or unrelated sketches from other jobs. Instead, the images depict what the Colossus, nicknamed “Big Robert,” is planned to actually look like.

The article’s text offers interesting information, such as that the tower will be a "70-meter steep sculpture.” But how high is 70 meters? Writers took care of this by offering a very nice image at the end of the article that puts the building’s size into perspective. The image shows a ruler on the left, then a small version of the Statue of Liberty, then the smaller Colossus, and the smaller still Round Tower (which is a Copenhagen landmark). The image’s caption is also helpful: “With its 72.5 meter height, Big Robert stands twice as tall as the Round Tower, a Copenhagen landmark, and only 20 meters smaller than the Statue of Liberty.”

The *Want to know more?* area on the right provides additional information about COWI’s participation in the project, and also gives the project manager’s name and e-mail address.

The *Read in Danish* link below the summary converts the article, on the spot, from English to Danish.



Pictured: This news item is well written, has simple bolded headings to alleviate scanning, and clear, related images.

As with the news article, the writing on the functional group pages is also interesting and free of poor marketese and redundancies. For example, users interested in learning about the Building and Operation team can click the *Organization* link in the global navigation, and work their way down the left-hand context navigation until they reach the *Building and Operation* main page. This page tells the most baseline information about what this team does:

> "*In Building and Operation we advise on all types of building projects, focusing on consultancy and sustainable development…*"

And scanning down to a section heading, again the information is quite helpful:

> ***"Specialist areas:** Our areas of specialist expertise include fire protection and acoustics, indoor climate, IT installations, and the working environment…"*

Good writing on intranets is not always readily available, but this organization does a very nice job of getting the main point across quickly.

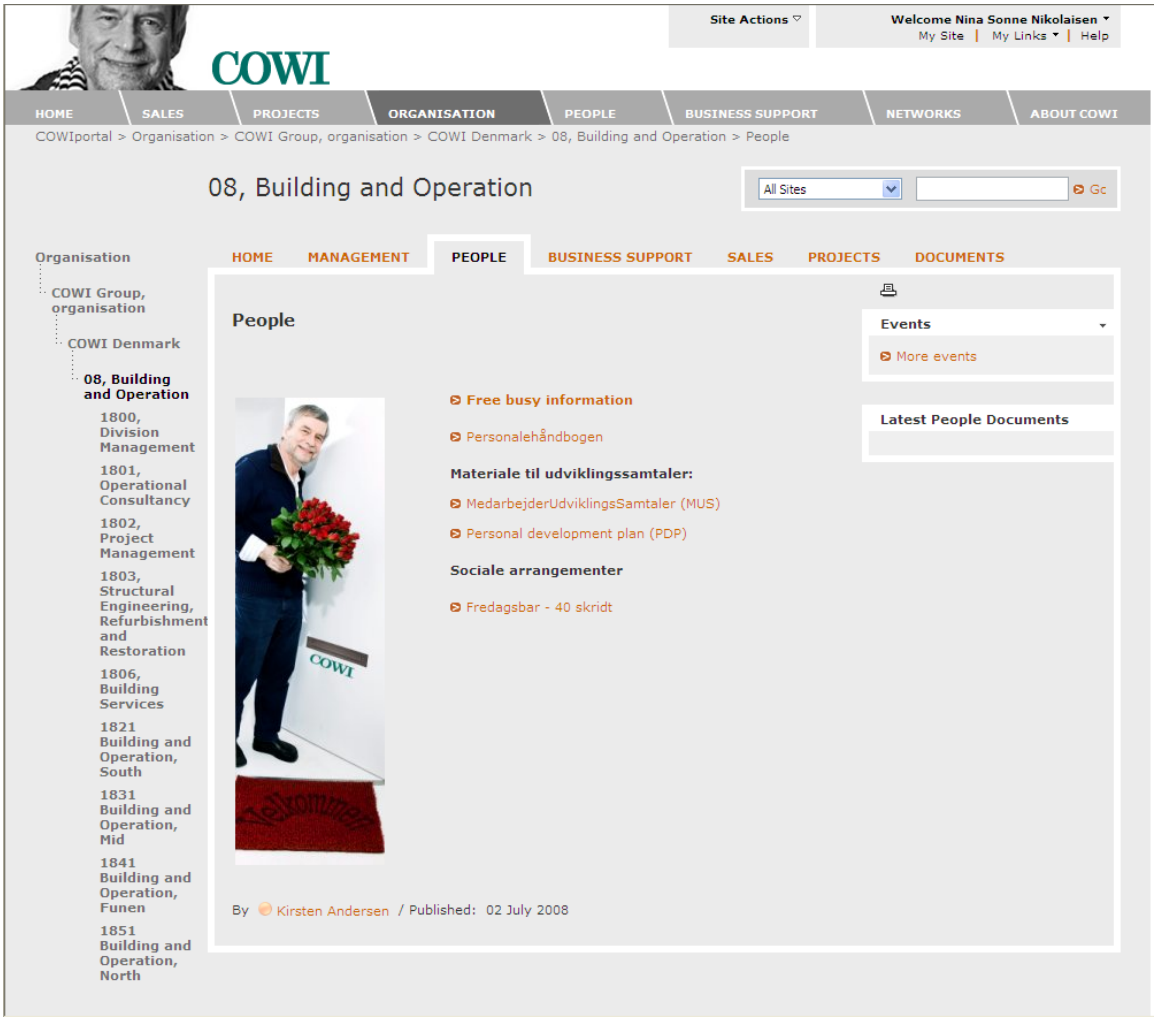
The related-links sections lead the users to more helpful information, as does the *More Information* box. This provides contact names, titles, e-mail addresses, and phone numbers.

Information about Groups

The *Organization* section offers users even more information about particular groups than they can find on the main section page. Here, users can access detailed information about teams by navigating the tabs for *Management*, *People*, *Business Support*, *Sales*, *Projects*, and *Documents.*

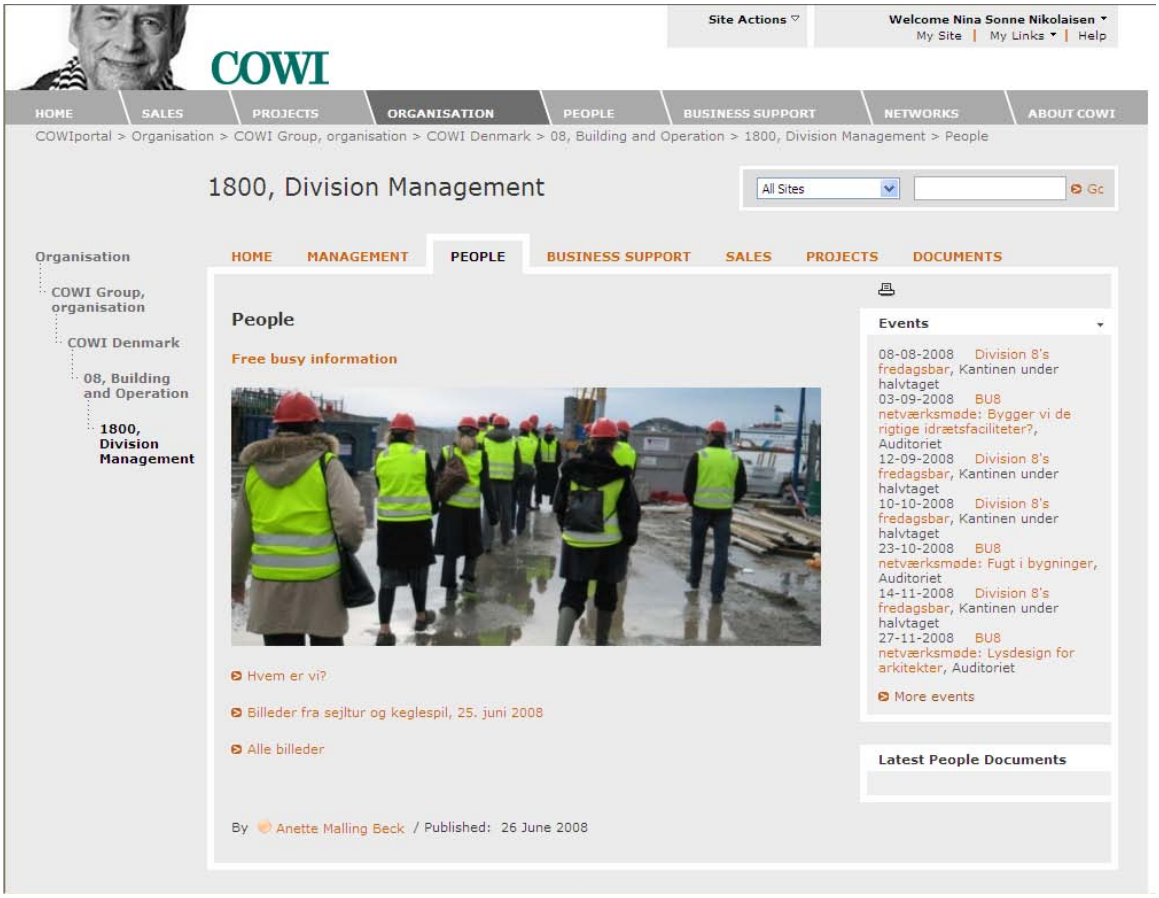
As the names indicate, the tabs contain information about management, people (including an overview of their availability from their Outlook calendars), business support specific to the unit, the unit's projects, and a document library. The tabs are easy to navigate, as is the sparse list of links.

10 Best Intranets: COWI Group A/S

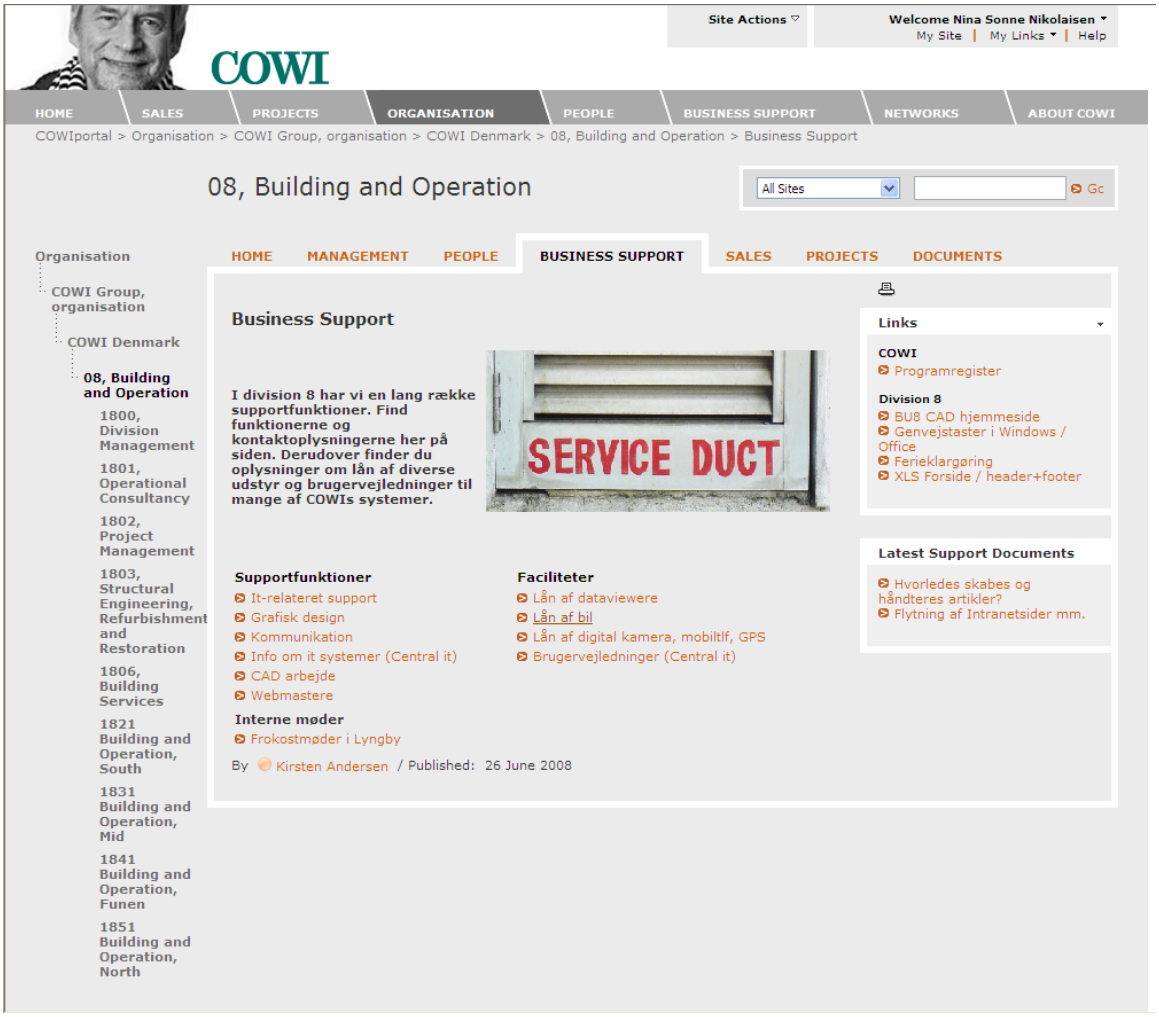


Pictured: The *People* page for this organizational site. The organizational sites have information about management, people (including, as this image shows, an overview of their availability from their Outlook calendars), business support specific to the unit, the unit's projects, and a document library.

10 Best Intranets: COWI Group A/S

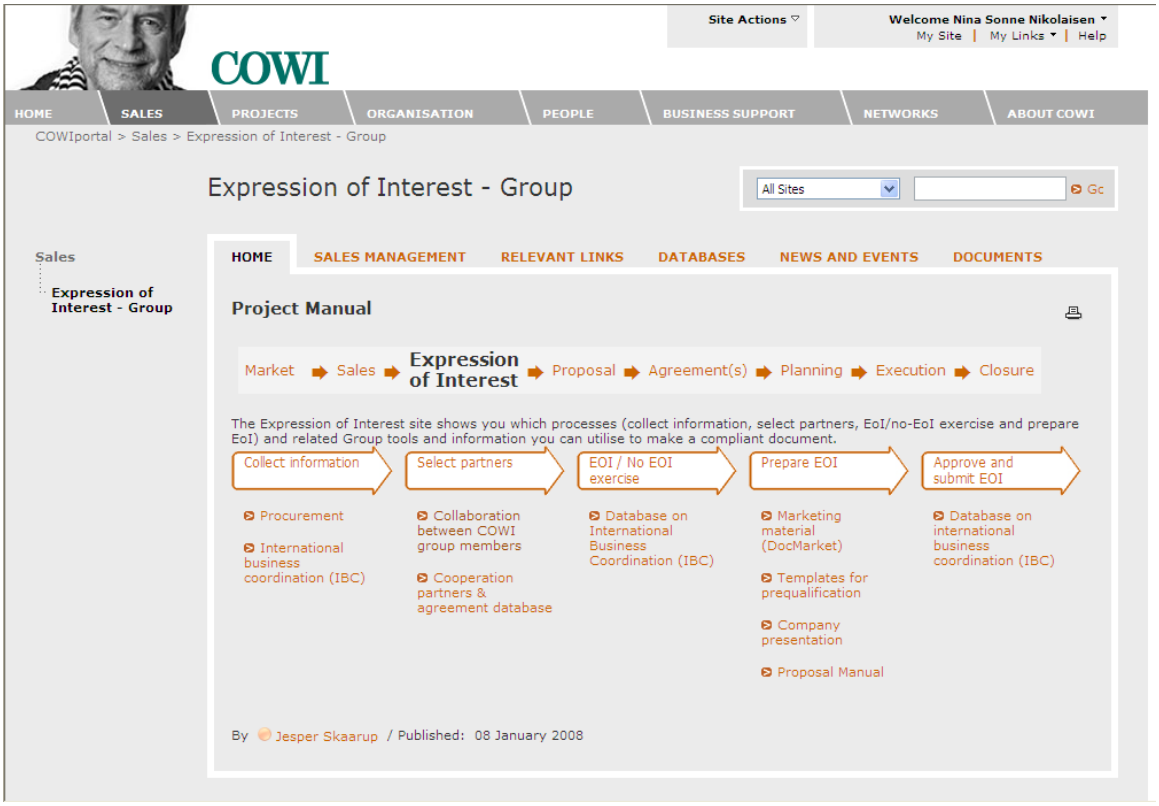


Pictured: An interesting picture adds a personal touch to the information about a project's staff.



Pictured: Another fun picture relates to the content of the *Building and Operations > Building Support* page.

In another example, a graphic describes the entire project process. The graphic and accompanying text can help people new to the organization; they can also help existing staff members recall steps in projects that they've not recently participated in.



Pictured: A graphic helps to describe the project process.

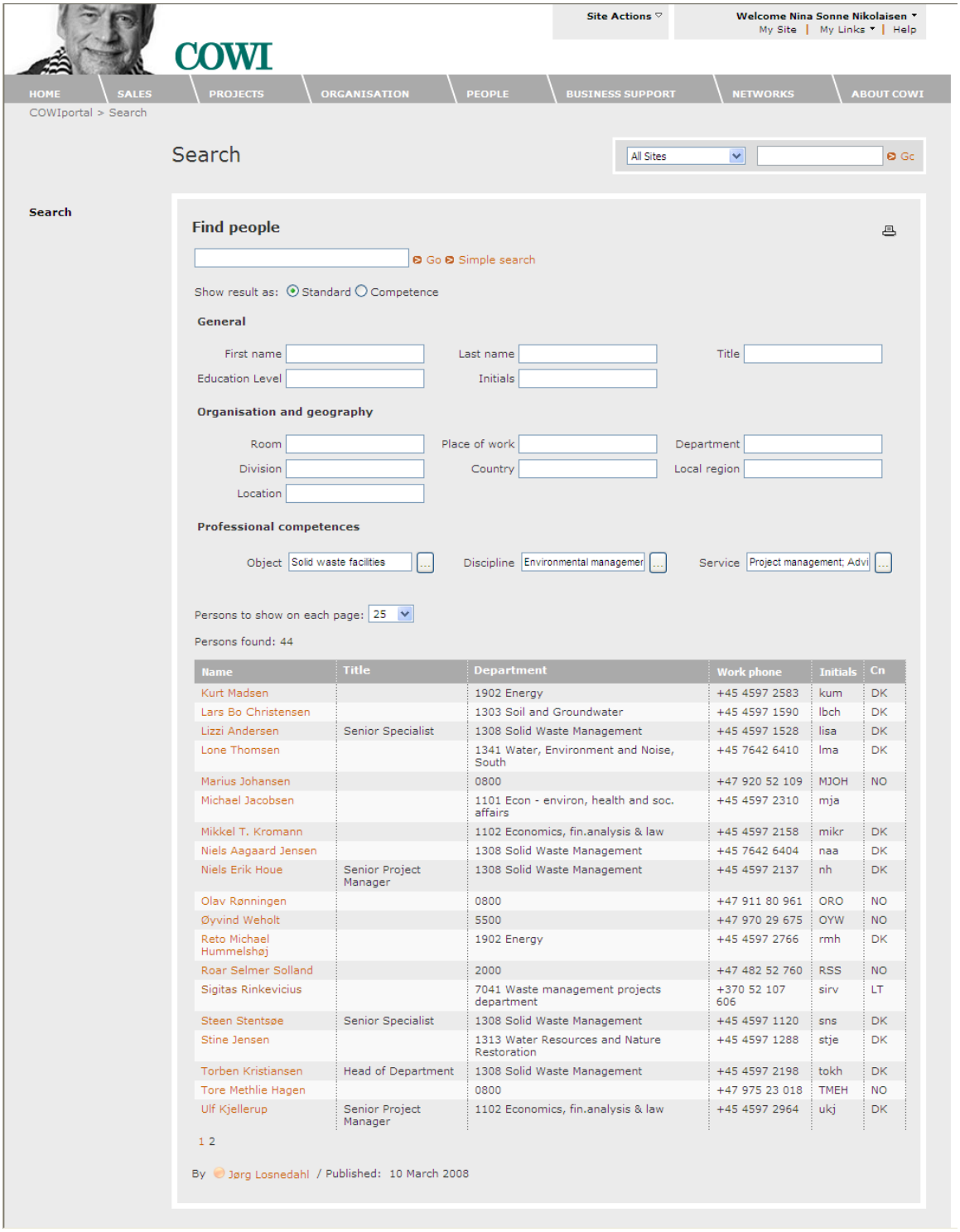
Throughout COWIportal, the graphics used are magnetic, with good subjects and equally good photography.

Finding People

With consulting jobs, finding the right people is one of the more important steps to success. Most users will find what they want via the simple people search field in the upper right of pages. But, if users want a more detailed search, that's available, too. They might, for example, select the small orange *Advanced People Search* link under the people search field. Clicking this link opens an array of choices to help users find that exact person they met once or heard about.

The form for advanced people search is appropriately titled *Find People.* Users can search by various criteria, including education level, title, division, location, and other geography-related fields. They can also search for people by *Professional competencies*, such as their discipline, services, and objects or areas of expertise.

Users can sort results by *Standard* or *Competence*, using the radio buttons toward the top of the page. The results appear in a table below the query fields, and users can click the names of people in which they are interested.



Pictured: The simple people search function is available in the upper left of the homepage and other pages on COWIportal. People who want to search by specific criteria can select the *Advanced People* Search link and search by location, country, division, and assorted other fields.

When users click a name, they're directed to a public part of the target person's own *My Site* section of COWIportal. The intranet designers did a great job here of not duplicating person documents between the "sanctioned" employee directory and the personal collaborative areas where users provide much more detailed information about themselves. Instead of making a user find and look at both pages, the design team selected the one most useful document to appear in the search results.

The information-rich page starts with the title, which is the person's name. A small but clear close-up confirms the person's identity. In the content area's first column, employees can find all of the expected basic information: the person's name, office, department, division, and so on.

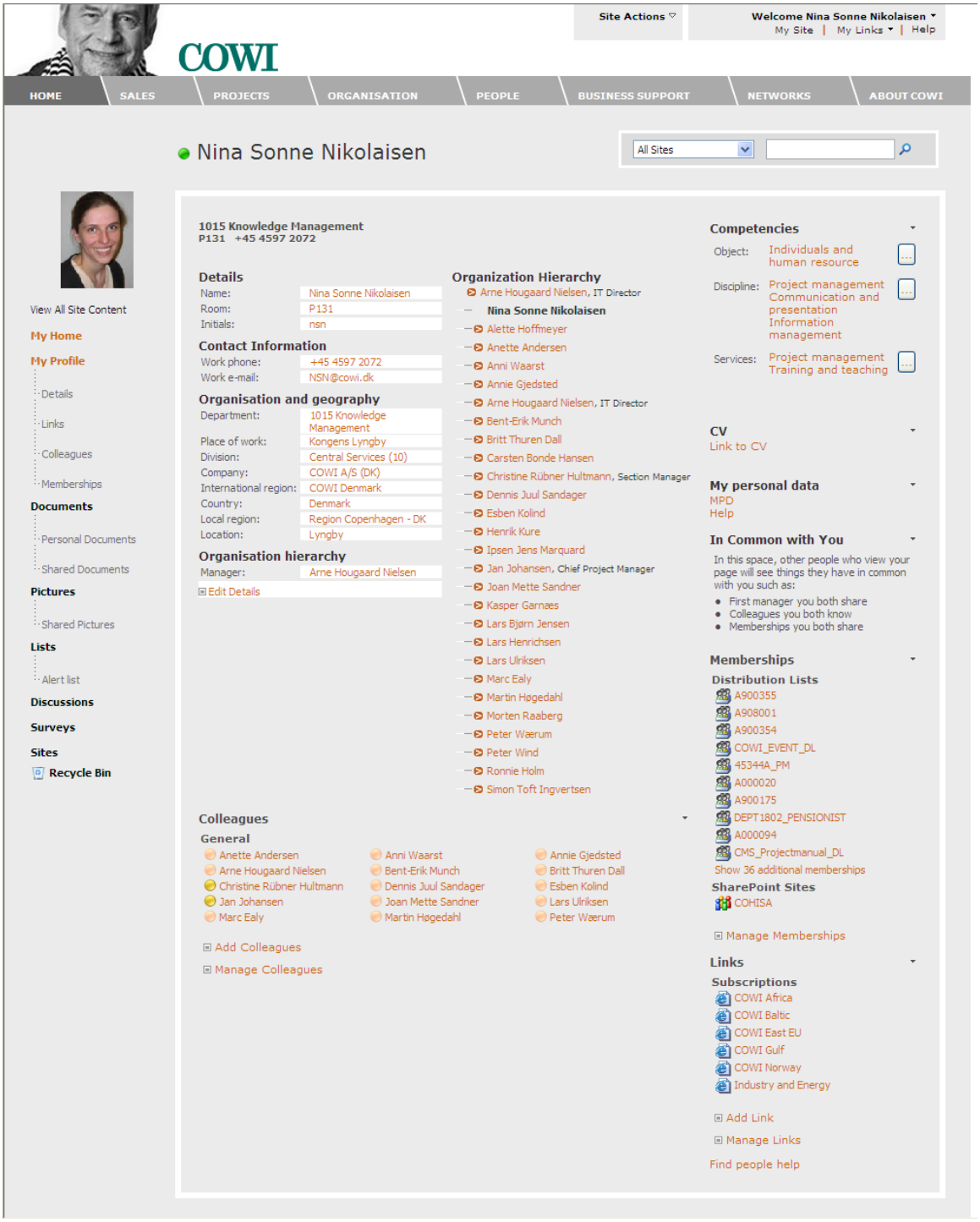
The next column shows where the person fits in the organizational hierarchy. In the upper right, the person's competencies are listed; only that person can edit this list. Following it is a link to the person's curriculum vitae, located in the CV COWI database. *My Personal data* links to the employee's data in SAP; again, this is accessible only by the target individual, who can directly edit the data in SAP to correct or update information such as a street address or bank account number.

The *In Common With You* section attempts to call out some of the things the logged-in user might have in common with the person profiled. This kind of information can make people who have never even met feel connected, building team and organizational spirit.

Finally, the user's memberships and links/subscriptions are listed as the final elements on the page.

Clearly, much of this information—such as knowing a person's skills—is helpful to COWI consultants and their daily work processes; being able to locate such information effortlessly is a considerable bonus.

The *My Site* navigation also includes other elements, such as *Documents*, *Pictures*, *Lists*, *Discussions*, *Surveys*, and *Sites.*



Pictured: An employee profile page. The people search result inks to a public page in the person's *My Site* area. In addition to the basic data that the organization consolidates for them, employees can provide an assortment of personal information.

The COWIportal designers took great strides in the personalization features, making it easy for consultants to find their own information. Collaboration and knowledge sharing also ride in the front seat on this intranet. But let's not forget the unsung

heroes: fabulous graphics and simple, clean text. This is not just the result of the immediate intranet team's efforts, but also of its ability to harness great work by many other COWI employees. And that is what being a triumphant, enviable portal is all about.

BACKGROUND

The COWI intranet originated in 1997 in the company's IT department. Christine Rübner Hultmann, COWI section manager, knowledge management, says that first intranet was built by "enthusiasts" who wanted a Web-based interface to share news and files. The main navigation was based on results from an internal report, *Knowledge in COWI*, and divided the intranet into the following subject areas:

- Management
- Finance
- Staff
- Facilities
- Market
- Projects
- Know-How

"The first intranet was only used by the Danish part of the COWI Group supporting around 2,000 users," Hultmann says. This first company intranet was updated using Microsoft FrontPage.

In January 2008, the new COWIportal, based on MOSS 2007, was launched. "We went from an intranet that purely supported publishing content to an intranet that supports collaboration and business processes across the COWI Group," says Hultmann. "The COWIportal is a necessary tool to make our 20 companies around the world able to work together on projects and share knowledge and resources."

So far, the portal has been rolled out to 3,000 employees in Denmark, Norway, Lithuania, the US, China, Belgium, and Turkey. It will be rolled out to the rest of the COWI Group over the next two years, including offices in Eastern Europe, the Arabian Gulf, and Africa.

A Vision for the Portal

The journey from that first intranet to the current portal implementation began in 2006. Jan Johansen, chief project manager, and Arne Hougaard Nielsen, COWI's IT director, provided the vision of what the COWIportal could be. The overall COWI business strategy—to make the 20 companies work together as one group—required a common platform, and Johansen and Nielsen made the case that the intranet could be that platform. Their vision has become the COWIportal's strategic goals:

- Integrate the companies in the COWI Group via a corporate intranet/portal supporting shared business processes
- Support seamless cross-company project execution (primarily document and task handling)
- Improve knowledge sharing, communication, and use of IT solutions in general.

Governance

The most dramatic changes in both staffing and governance were introduced with the portal's rollout. "The old intranet did not get much attention from management," says Nina Sonne Nikolaisen, knowledge management consultant. "Now there is a Portal Governance Committee where the Executive Board is represented and it acts as a steering committee for the portal.

"The COWIportal project changed the intranet from being a content container for news and support to being the work place of every employee—and therefore a company-critical tool," she says.

Today, COWI's Portal Governance Committee (PGC) comprises the portal's internal owners. "The PGC funds and prioritizes (at a high level) the development of the portal," says Hultmann. Several members of the PGC are also members of the Executive Board. "This ensures that the portal continues to be a strategic tool that supports the company's strategy," she says.

The current intranet is divided into a number of sub-portals, each supporting a main business process within COWI, such as sales or project execution. The executive board member who is responsible for the business process that the sub-portal supports owns the corresponding sub-portal. And all of the sub-portals are built on a common platform called the Portal Framework. This comprises the functionalities used across all sub-portals, such as site templates, navigation functionality, knowledge sharing tools, and search functions.

Staffing

The Department of Knowledge Management owns the portal framework and operates the sub-portals on behalf of the internal owners. "We help the owners prioritize new links, content, campaigns, and IT development within their areas in the portal," says Hultmann. "We work as knowledge management consultants helping them to make the portal support business in the best possible way."

The department employs two full-time consultants and two assistants. A third full-time consulting position is shared by three consultants, each working part-time on the project sites. Another consultant works half-time on the new search engine, and a journalist in the Department of Communication works full-time, contributing articles to the COWIportal and advising content owners on how to write news.

Four IT developers work full-time with the COWIportal (intranet, project sites, and search engine) and several other IT people are involved in maintaining the servers and network access.

INTRANET TEAM

Staffing over Time

In 2000, the first webmaster was appointed (Christine Rübner Hultmann). She worked for the quality manager and was responsible for both the intranet and the company's website. Then, in 2003, "the knowledge manager took over the responsibility from the quality manager and a second person was appointed to help Christine update news on the website and on the intranet," says Nikolaisen.

In 2005, the responsibility of the website was transferred to the Department of Communication. The Department of Knowledge Management now reports into the IT Director and works in close operation with Johansen, the main business consultant in the IT Department.

Today, the Department of Knowledge Management is responsible for giving strategic advice on the portal's development to the Executive Board and for consulting and advising all content owners on the COWIportal rollouts in the remaining COWI Group companies. "We also write requirement specifications for new features on the portal and test new features before they are rolled out," says Nikolaisen.

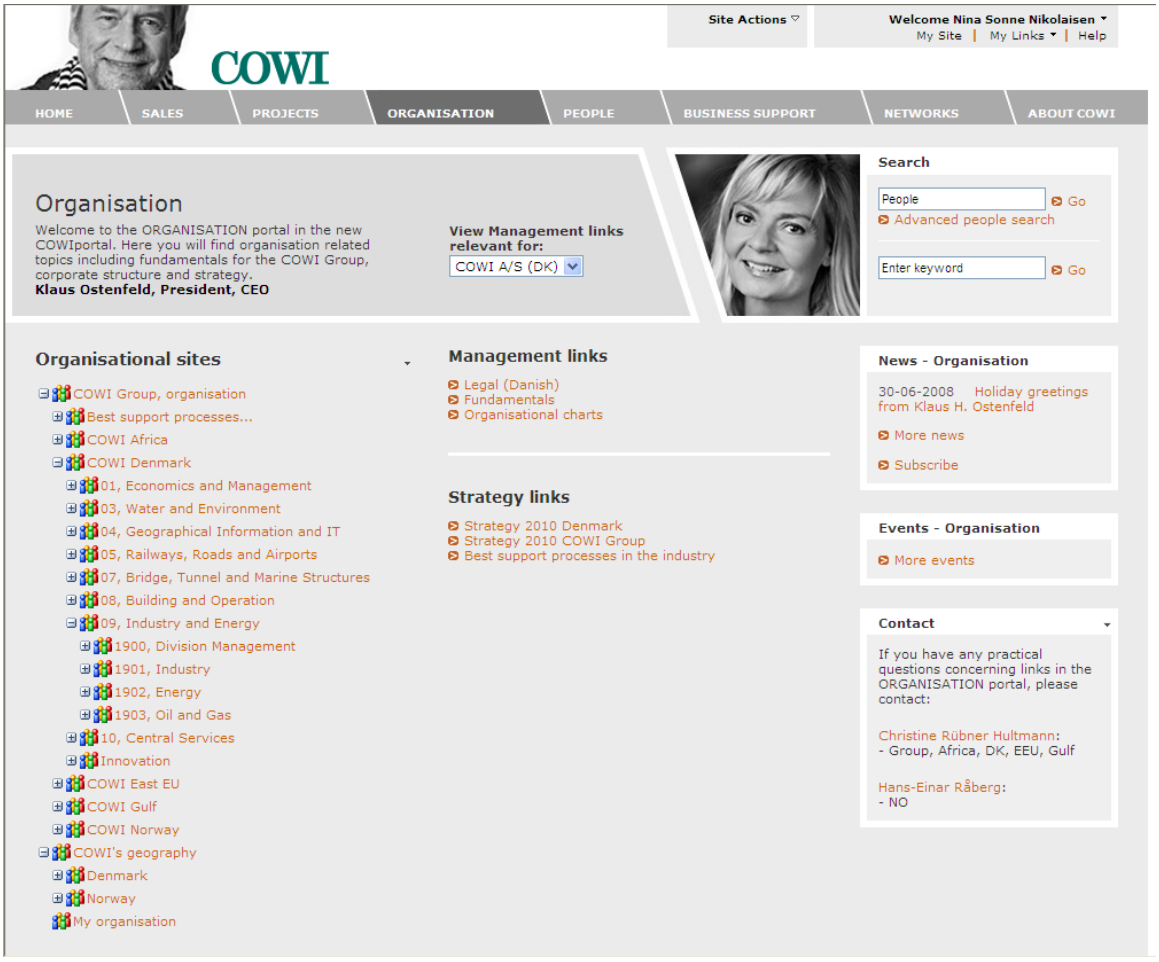
Working with Agencies

Approximately 15 COWI consultants created the requirements specifications for the COWIportal. This process took four months to complete and involved nearly 100 other COWI employees who participated in interviews and focus groups.

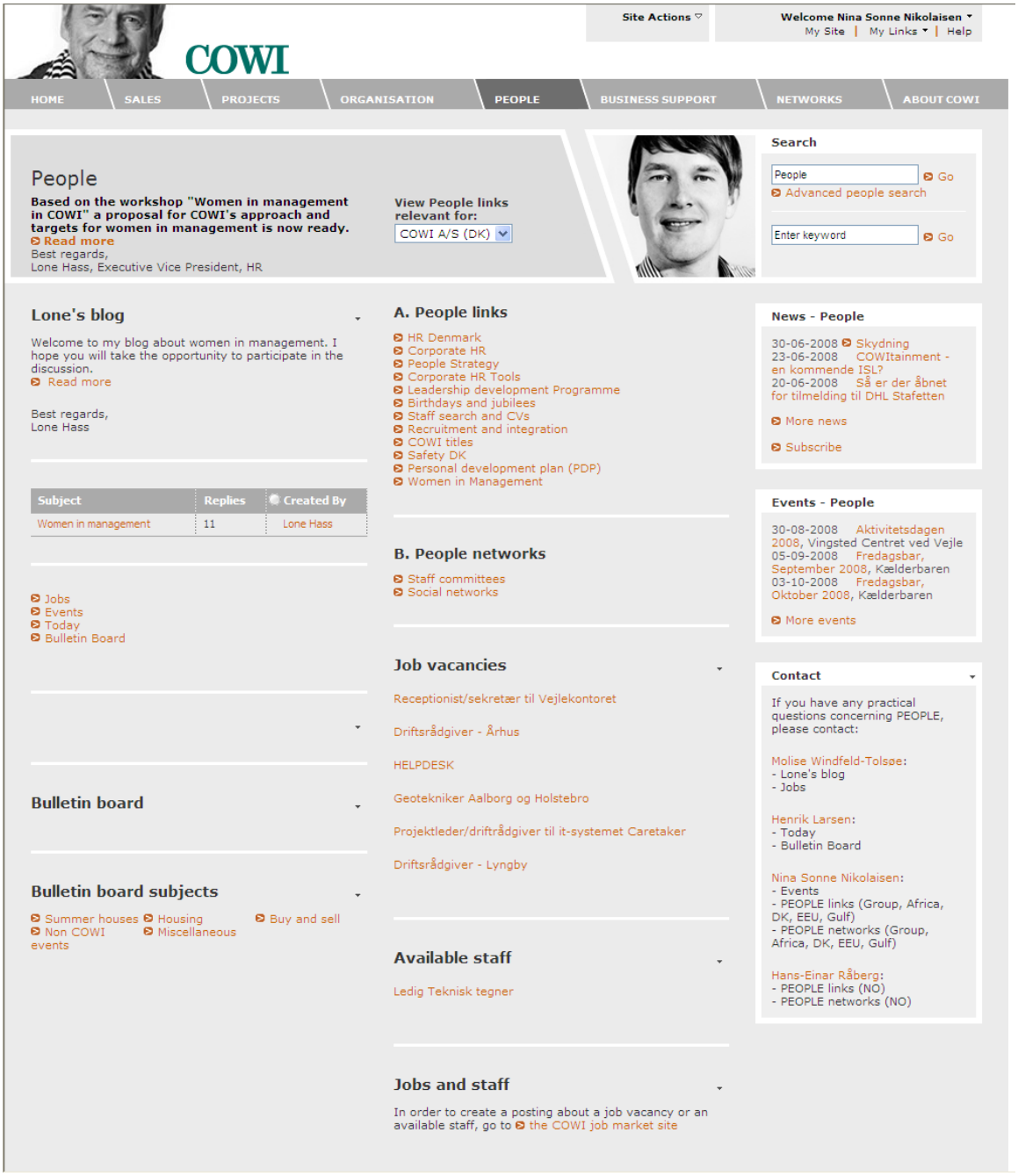
COWI hired Netcompany in March 2007 to bring the requirements specification to fruition. Netcompany worked hand-in-hand with COWI IT developers throughout the process. "In this way, COWI has ensured knowledge sharing and reduced project costs," says Nikolaisen. "Netcompany also contributed with valuable advice on how to make the project sites more user-friendly."

Framfab provided the graphic design and, according to Nikolaisen, provided some very useful usability suggestions about how to organize the portal's homepage. On the sub-portal front pages, Framfab brought together all elements with audience-dependent links and suggested the audience drop-down box that lets users see links from other regions. (By default, users see links targeted at their own region, for example, COWI Denmark or COWI Norway.)

10 Best Intranets: COWI Group A/S



Pictured: The main navigation displays on the top of every page. The navigation is modeled on COWI's main business processes: sales, projects, organization, people, business support, and networks. All activities are found under the relevant process. As such, a department site contains only issues concerning the management, financial status, and social life for this group of people. The group's sales activities are found under *Sales*, its projects under *Projects*, and its professional documentation across projects under *Networks*. The organizational sites appear in the left-side menu on the *Organization* portal's front page, while links to management issues are in the middle of the page.



Pictured: On the front page of the *People* portal, the Executive Vice President, HR, is blogging. There are also links to internal job advertisements, HR-related issues, and a bulletin board. Company VPs own the sub-portals (*Sales*, *Organization*, *People*, and so on); the owner's name is displayed in the top left field on the sub-portal's front page.

GOALS AND CONSTRAINTS

Strategic Goals

- Integrate the COWI Group companies via a corporate intranet portal that provides support for shared business processes

- Support seamless cross-company project execution (primarily document and task handling)
- Improve knowledge sharing, communication, and use of IT solutions in general

Constraints

All companies in the COWI Group must have COWI IT infrastructure implemented before all employees can share the COWIportal as their workplace. This means that global rollout will be affected by each region's ability to meet that mandate. "It will take approximately two years to have this implemented in all companies," says Nielsen. "It is an open question whether available Internet bandwidth in Africa will become fast and cheap enough to make it feasible to implement the COWIportal in all the African companies within the next two years."

TIMELINE

COWIPORTAL PROJECT TIMELINE	
2001	• The knowledge manager wrote a memo about a vision of a COWIweb comprising the intranet, extranet, and website.
2004-2005	• A new CMS-based system for the COWI websites was specified, developed, and launched.
2006	• The Executive Board was convinced that a COWIportal consisting of intranet and extranet (project sites) was a necessary tool to implement the company strategy of working across the world as one company. • **August–November:** Requirements specification. • **December–January 2007:** Call for vendors. Several consultant companies were asked to respond to the requirements specification. They were assessed and a company was chosen to contribute to the project.
2007	• **January–March:** Assessment of vendors and contract negotiations. • **March:** Contract signed with Netcompany. • **April–June:** Detailed functional design. • **July–September:** Intranet built. • **October:** Intranet tested. • **November**: Training courses held for editors. The courses covered basic editing skills, including how to edit and create a page, how to upload images and insert links, and how to publish news and events. • **December–January 2008:** The 150 editors built their sites. • **January 7:** The intranet was launched in COWI Denmark (2,200 employees). • **July–December:** The extranet (the project sites) was built.
2008	• **January:** The extranet was tested and four-hour courses were held for 70 project managers.

	• **February 4:** The extranet and the *Find People* application were launched. • **March 10:** The COWIportal was launched in COWI Norway (700 employees). • **April 7:** The COWIportal was launched in COWI Baltic (100 employees).
2009	• **January:** The new search engine, Autonomy, will be launched, replacing the Microsoft search engine in the COWIportal.

USERS

COWI portal users fall into three main categories:

- **Consultants and project managers** working on projects for customers worldwide (approximately 60% of the users). Most of them have laptops and work on VPN connections part of the time. These employees must be able to access project information at anytime, from anywhere in the world.
- **Support staff working in the office** (approximately 30% of the users). These employees often need to access information about procedures such as recruitment, travel, and work place information.
- **Managers** (approximately 10% of the users). Managers want to communicate their business goals to employees and make sure that they get heard.

USER TASKS

Meeting Organizational Goals

"The main challenge was to reach our ambitious goals in less than a year," says Johansen. "One of our main challenges was coordination and homogeneity between the different tracks in the project. One group worked on the project sites, another on the organizational sites. A third group worked with news and a fourth group worked with the IT infrastructure."

Because of this distributed work breakdown, decisions made in one group might affect the work of all the other groups. "It was very difficult to communicate enough between the groups and keep things on the same main track," he says.

"We have skilled project managers, but none of us had made an intranet before. I think what made us successful was our understanding of both the strategic goals of the top management and of the day-to-day operations of the project managers whom the intranet must support."

Because the site was designed to support the company's business strategy, the structure is based around the company's main business processes and activities, including sales, projects, management, people, business support, and networks.

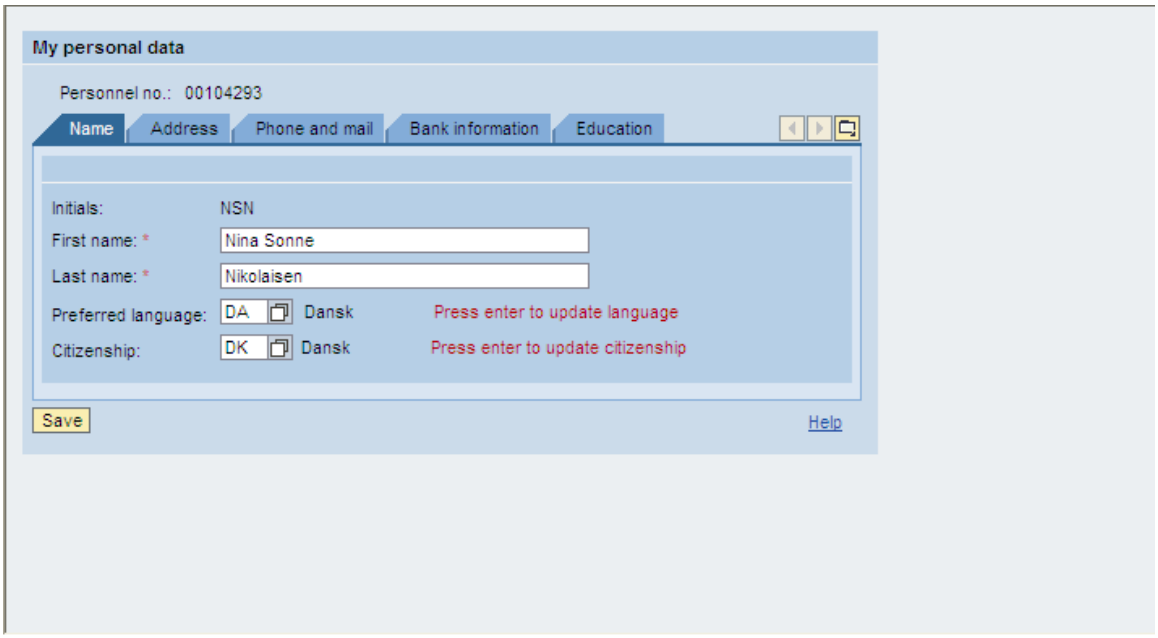
User tasks

The following are the most common user tasks supported by the COWIportal:

- **Project execution.** According to Henrik Steen Pedersen, head of Surveying & Land Administration, this is perhaps the most important task supported by the site. Project managers create a project site as soon as they create a

document related to a potential project. A project site can be used from this early stage throughout the proposal and contract phases to the execution phase. The project sites are structured in phases that ensure easy access to every phase and all documents. Customers can be given access to the project sites, creating a foundation for close cooperation.

- **People finding.** Finding people is a common user task on the portal.
- **Finding business support information.** This task encompasses getting an overview of the processes involved in recruitment or travel, completing order forms online, or registering changes in work place information (that is, online forms to handle all the practical details when a person or a department changes offices within the COWI Group).
- **Access SAP.** Employees can access SAP applications directly from the COWIportal, where they can fill out time sheets and travel expenses, and update personal data (address, bank information, education, and so on).



Pictured: The COWIportal's SAP interface.

DESIGN PROCESS AND USABILITY ACTIVITIES

The COWI design team conducted a number of user-related activities throughout the project. These included listening to users through user interviews, persona development, and prototype testing. And through each activity, the team listened, learned, and made modifications to the information design.

"When we did the requirement specification, we started out with interviews," says Nikolaisen. "The project group that worked with project sites conducted focus groups with project managers. The first groups were used to discuss needs and wishes, whereas later groups were presented with PowerPoint prototypes and use cases."

Nikolaisen's group interviewed users, asking them questions about what helped them in their daily work and what annoyed them. "We selected users from all parts of the

organization with different jobs and titles," she says. "After the 15 interviews, we condensed the results into the three personas [described below] and their needs."

The team then made PowerPoint prototypes of the main navigation pages and the site types (organizational, business support, and network sites) to test the information structure and the requirements for each site type. They asked five users representing the two most important personas to test the prototypes. "We asked the users where in the portal they would look for information about recruitment, IT support, marketing material, and so on," says Nikolaisen. "When they decided to click on a link, we provided them with the next page. It was very low tech, but it still helped us name the main navigation and decide how to group content and where cross-linking would be needed."

Listening to the Users: Monitoring Current Practices

All the consultants involved in the COWIportal's development had first-hand experience with either the old intranet or the old way of carrying out COWI projects (on a shared file drive) or both. "In COWI, we used to share all project documents on file shares," says Nikolaisen. "Each project had a folder with the project number. The file shares could only be accessed from other offices in the same region—in Denmark, for instance—so it was very difficult to work on a project with Danish and Norwegian project members, because we had to send files to each other by mail."

Knowing how the users worked with the existing systems helped designers come up with ideas for the intranet and with bigger and better ways of doing things. "We had been listening to the users for years and knew that some of the main obstacles to knowledge sharing and interaction were the technical barriers and the way in which information was found on a number of sub-sites instead of being prioritized and targeted," says Nikolaisen.

"Some of the project members had been responsible for the old intranet for years, supporting all the editors and publishing news every day, so we had first hand experience with all the possibilities and difficulties of the old intranet," she says.

Although it was possible for professional networks in COWI to have a network site on the old intranet, it required HTML skills to edit the pages. As a result, says Nikolaisen, it was much easier for a network to just share files on a file share than to upload them to the intranet and make an HTML link on Web page to the file.

"Our editors used FrontPage to edit the intranet pages, but this was not a very user-friendly tool and often resulted in errors on the pages and in the navigation," says Nikolaisen. "It was possible to post news on a network site and on an organizational site, but users had to visit these sites in order to see the news, so it was not a very effective way of pushing information to people."

Designing for Users: Personas

Personas can be a very powerful way to teach and remind team members about your users. It's important to come up with personas based on real usability feedback so that you can paint an accurate picture of your user types.

"We found the use of personas very helpful in order to summarize the points learned from the interviews and focus groups," says Nikolaisen. Often, one persona is not enough; to give the team good information about users, you need to create a few personas. The team created three personas to represent the COWI users:

- **"Peter"** represented the consultants and project managers working on projects for customers worldwide. Peter has a laptop and works on VPN

connections part of the time. He must have access to project information anytime, from anywhere in the world. (This persona represented approximately 60% of the users).

- **"Maria"** represented the support staff working in the office. Maria often needs access to information about procedures related to the workplace, as well as to recruitment, travel, and so on. (This persona represented approximately 30% of the users).
- **"Thomas"** represented the managers. Thomas wants to communicate his business goals to employees and make sure that they hear and understand them. (This persona represented approximately 10% of the users).

The team assigned design issues discovered during user research a relative importance based on the percentage of staff affected. Issues were considered high priority if they affected a large percentage of the staff, and low priority if they affected relatively few users. This helped the team to get to work and not be paralyzed looking at a long list of to-do items.

The “Peter” persona was the most important user to support, then came Maria, followed by Thomas. So, for example, changing "Management" to "Organization" in the main structure was considered a high impact change because both Peter and Maria would benefit.

Testing Prototypes

Nikolaisen and her team were able to make subtle, yet important site changes based on testing design prototypes with users.

Take, for example, the sub-portal name change from "Management" to "Organization." If named “Management,” only managers would know that the sub-portal hosted all the organizational sites; it made sense to change the name and target the users.

“Organizational sites are a way to help managers communicate with their staff,” says Nikolaisen, “but employees perceive it as a place to get information from the organizational units they belong to—such as department, business unit, and region. The point of view of the users is very important when naming parts of the intranet, and so is the courage to prioritize one group of users over another.

“You cannot please them all,” she says.

Making Changes

The design team made a concerted effort to design the homepage to resolve some of its previous shortcomings. With the redesigned page, team members wanted to help each user get an overview of new and important information that was personally relevant. News, events, alerts, and tasks are pulled from many different sites, including project sites, network sites, organizational sites, sales sites, and people sites (staff committees and social networks). The items are then aggregated on the homepage. In addition, users can add their own shortcuts to the homepage.

Even with a thoughtful design approach, mistakes were made and the team realized this only through real-world interactions with the users. Below are some examples of the team’s lessons learned and the changes made to accommodate this new understanding.

Users Will Create Work-Arounds

"When we launched the COWIportal, we had a notion that in order for people to grasp the information on the portal, the homepage should not be too full of information," says Nikolaisen. The team believed that users should be able to see everything in one screen display without scrolling; this informed the team's decisions about what to include and exclude from the page.

The team decided to post news on the homepage, but not events as it took up too much space. "But we kept being asked by users where they should look to get an overview of all events from the sites they were members of," she says.

Nikolaisen says when people realized that events were only displayed in the event calendar on the site where they were created, they developed a work-around to get them to display on the homepage. They began to make news items about the events.

Three months after the launch the team decided to allow scrolling on the homepage and implemented *Events for you.*

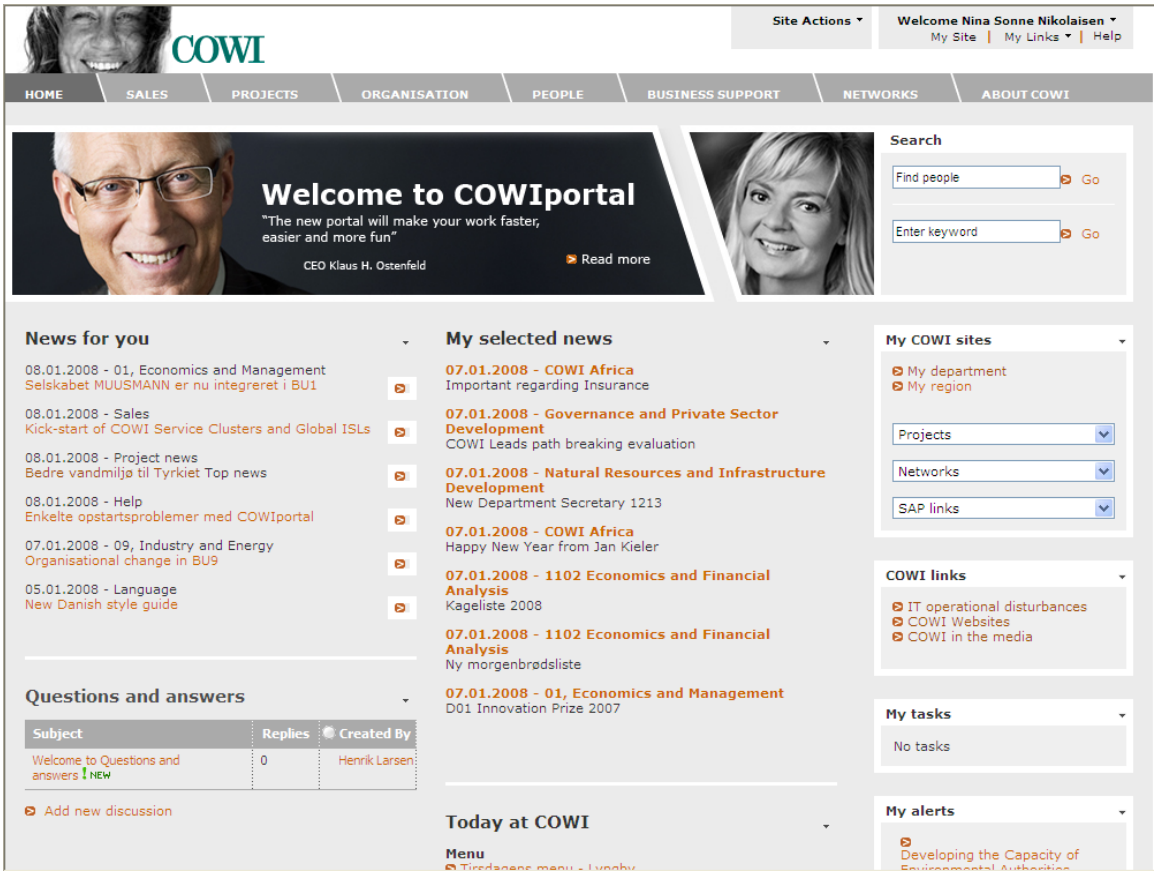
Users Reject Intermediary Pages

Another design change related to the news roll-up on the homepage. In order to help users get an overview of information from all their organizational units, the design team initially created a roll-up site, where information was gathered from all the organizational sites of which users were members. "We called the site 'My Organization,' and it showed the latest news, events, and documents from their department site, business unit site, and region site, as well as the summaries from the main pages on these sites," says Nikolaisen.

But users didn't like *My Organization*. The design team learned that users preferred to have all roll-ups on the homepage (news, events, alerts, tasks) plus direct links to their sites. The intermediary roll-up site fulfilled neither the purpose of giving a full overview of the latest information, nor of being the place where more static information from the organizational units could be found. So, six months after the site launched, the team removed *My Organization* and replaced the link with three direct links to the user's organizational units.

Changing the Template

"A third lesson learned was concerning the news template," says Nikolaisen. "We made a template with four different image fields, each with a specific size. It looked really great, but after the first few training courses we realized that this did not meet the user requirements, and we made a second more flexible template." Most of the users in the courses gave feedback on the template.



Pictured: An early version of the COWIportal homepage. In this design, the team was trying to keep all the important information above the virtual fold.

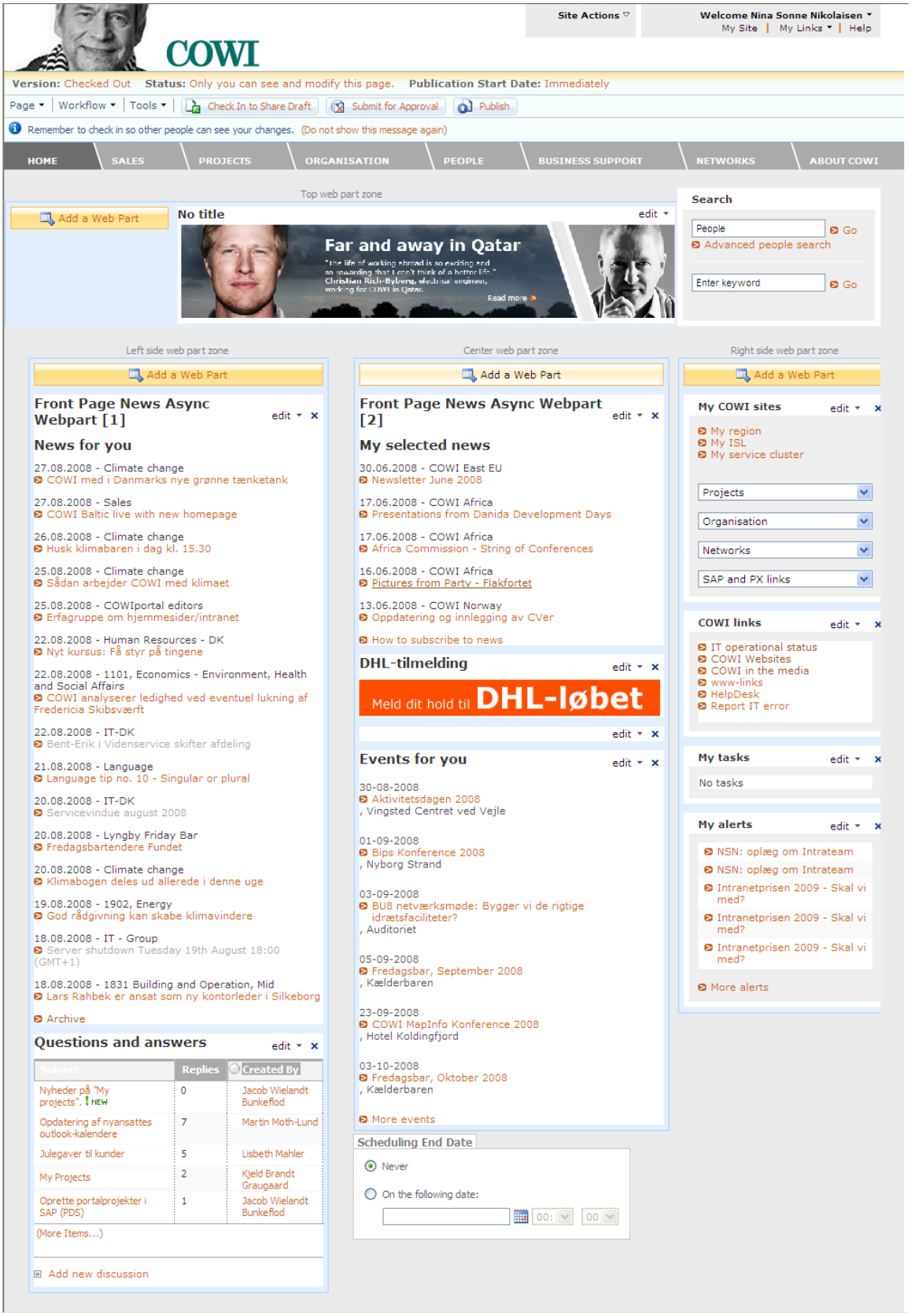
URL AND ACCESS

The URL of the homepage is www.cowiportal.com and it is every user's start-up page. Users can log in to specific project sites from non-COWI PCs using a username and password. "This winter, we will launch a 'key' that can be used by COWI employees working in COWI companies that do not yet have COWI infrastructure in order to log onto the COWIportal," says Nikolaisen. "It is not yet decided whether it will be a token or another solution."

TECHNOLOGY

The COWIportal is based on MOSS 2007.

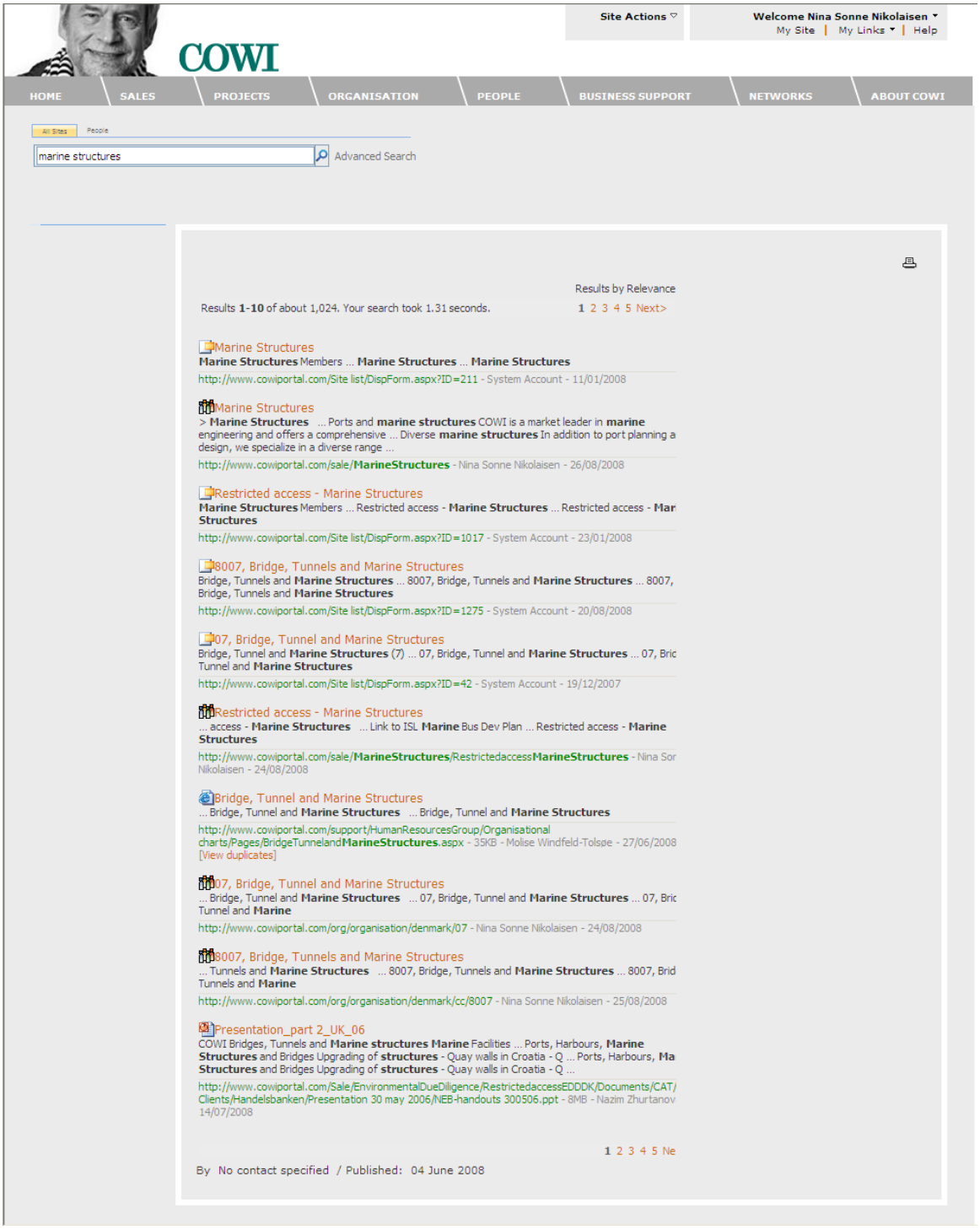
"A great advantage with MOSS 2007 is the easy way the user interface can be changed using Web parts," says Nikolaisen. "The above mentioned changes in the design of the homepage were made by configuring Web parts and did not require a developer."



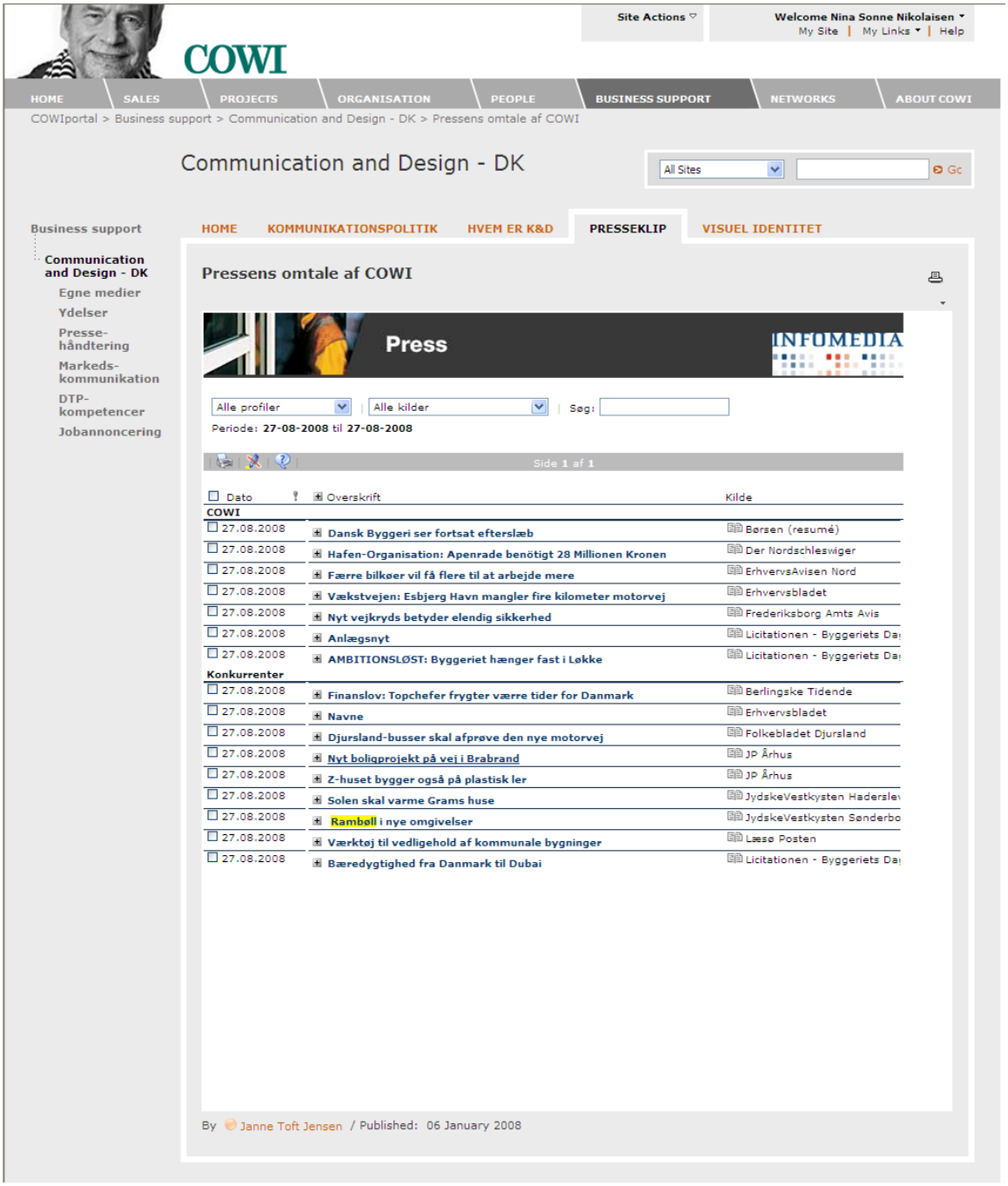
Pictured: The homepage in "Edit mode."

SEARCH

COWI is using the standard Microsoft search solution, but by the time this report goes to press, they will have implemented Autonomy. “With Autonomy, we expect to implement a feature like Google ad words where our search engine specialist can define search results triggered by specific search key words,” says Nikolaisen. “But for now, we use the standard Microsoft search engine.”



Pictured: A search results page for the term “marine structures,” which is one of the company’s key services. The second hit is the sales site for this service area; results eight and nine are two department sites—one from COWI Denmark and the other from COWI China. The sixth result is a sales site with restricted access; it appears in the results only because the user is logged in as an administrator. Apart from administrators, only members of this site will be able see it in the search result list and in the portal’s navigation.



Pictured: The news feed from an external agent showing all press coverage in Danish media about COWI and its competitors.

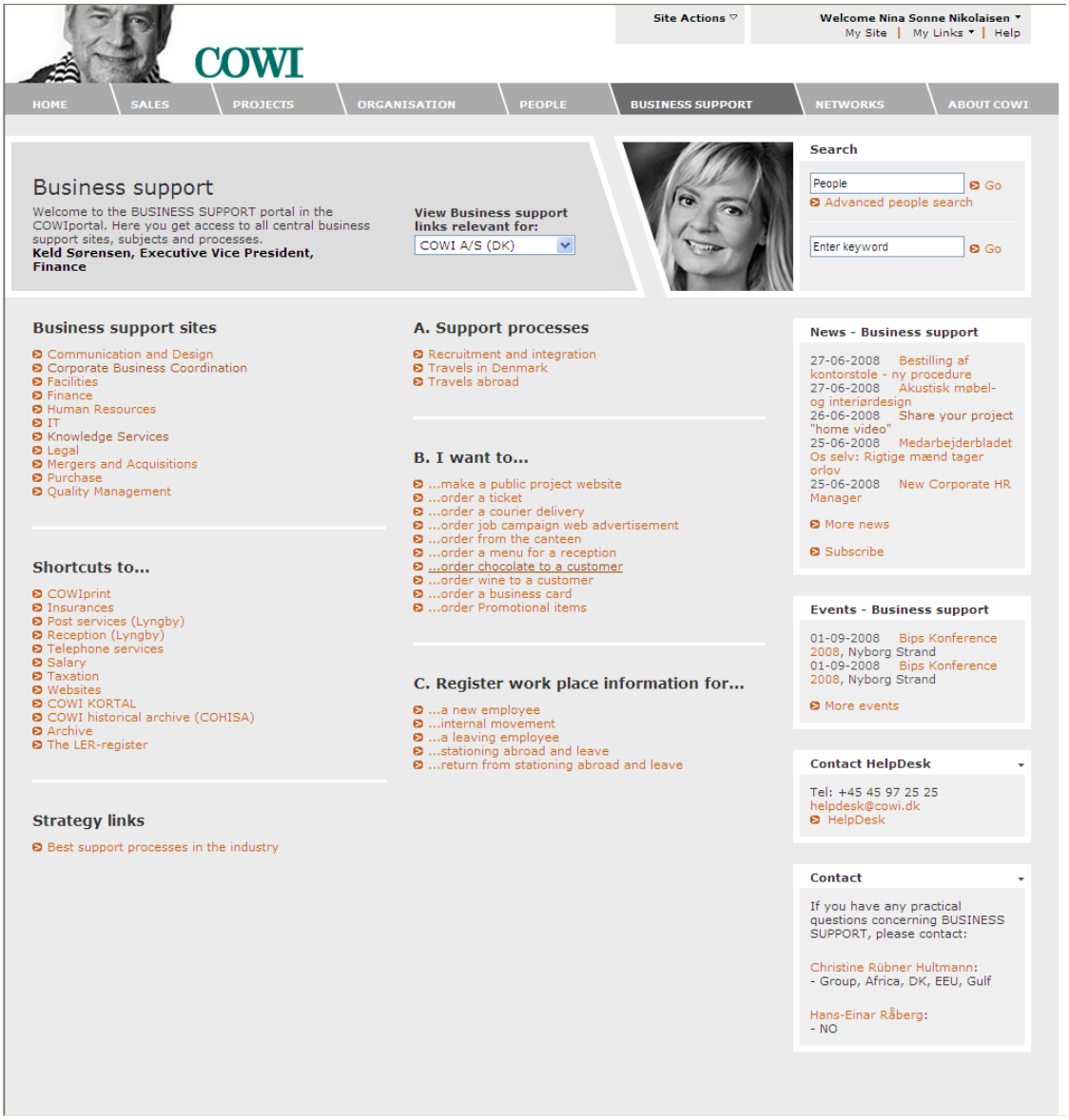
CONTENT MANAGEMENT

Content on the COWIportal is both centralized and de-centralized. Within the site's *Project* area, all employees can create project sites. Such sites are organized in a non-hierarchical manner and users can find them in the *Project* list.

The Department of Knowledge Management creates all other sites. Some are created in conjunction with roll-outs of the COWIportal to entire companies (such as organizational sites, including department sites, business unit sites, company sites, and regional sites). "Others are created because two people need a place to share professional information and request a network site," says Nikolaisen.

The portal's main areas are owned by the members of top management, each of whom has an appointed editor. *Sales*, for example, is owned by the corporate business coordinator, while *People* is owned by the executive VP, HR. According to Hultmann, "this governance structure is set in place to ensure that all the main areas develop in accordance with the business strategy."

In addition, the manager who is responsible for the site's strategic use owns each organizational site and sales site. The project managers own project sites.



Pictured: Links to online forms on *Business support*, a main navigation page. This support portal has links to frequently accessed tasks. Most of these tasks are supported by forms that users can fill out online.

Using Templates

Each site is based on a site template, and all new pages are made from available templates. It is only possible to create pages or sites that are based on the templates. The intranet team offers training courses and supplemental videos to support e-learning. “We cover editing and access rights administration, but also document management in the portal,” says Nikolaisen. “It is standard SharePoint functionality, but we have realized that being able to use SharePoint document management is a skill that has to be acquired, just like using Office products. It is not something the users just learn by intuition—perhaps those below 30, but they are a minority.”

MOBILE

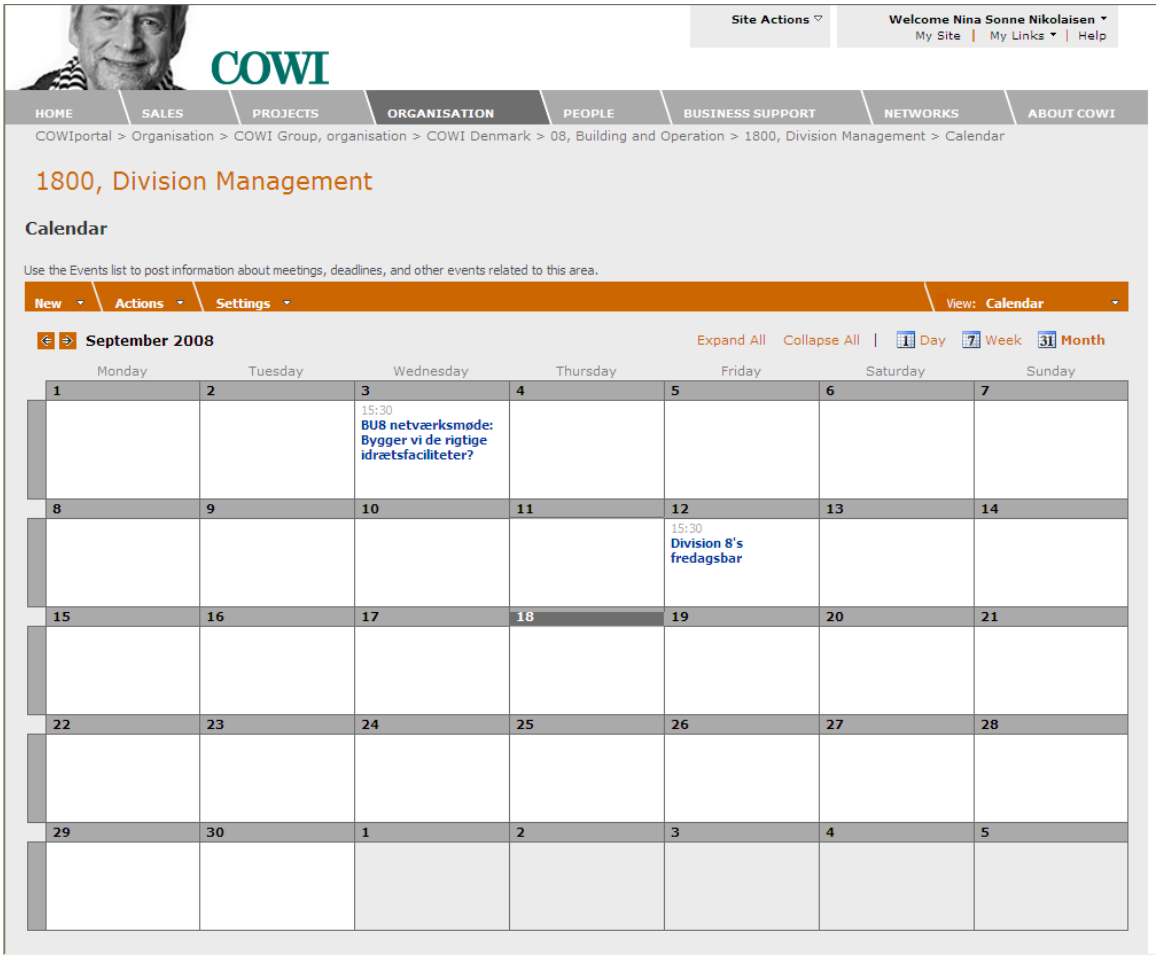
Mobile

The COWI portal is not available from mobile devices. Users can access their Outlook e-mail and calendar. “When asked, users have not expressed any wish to be able to work on projects from their PDA,” says Nikolaisen.

FEATURES

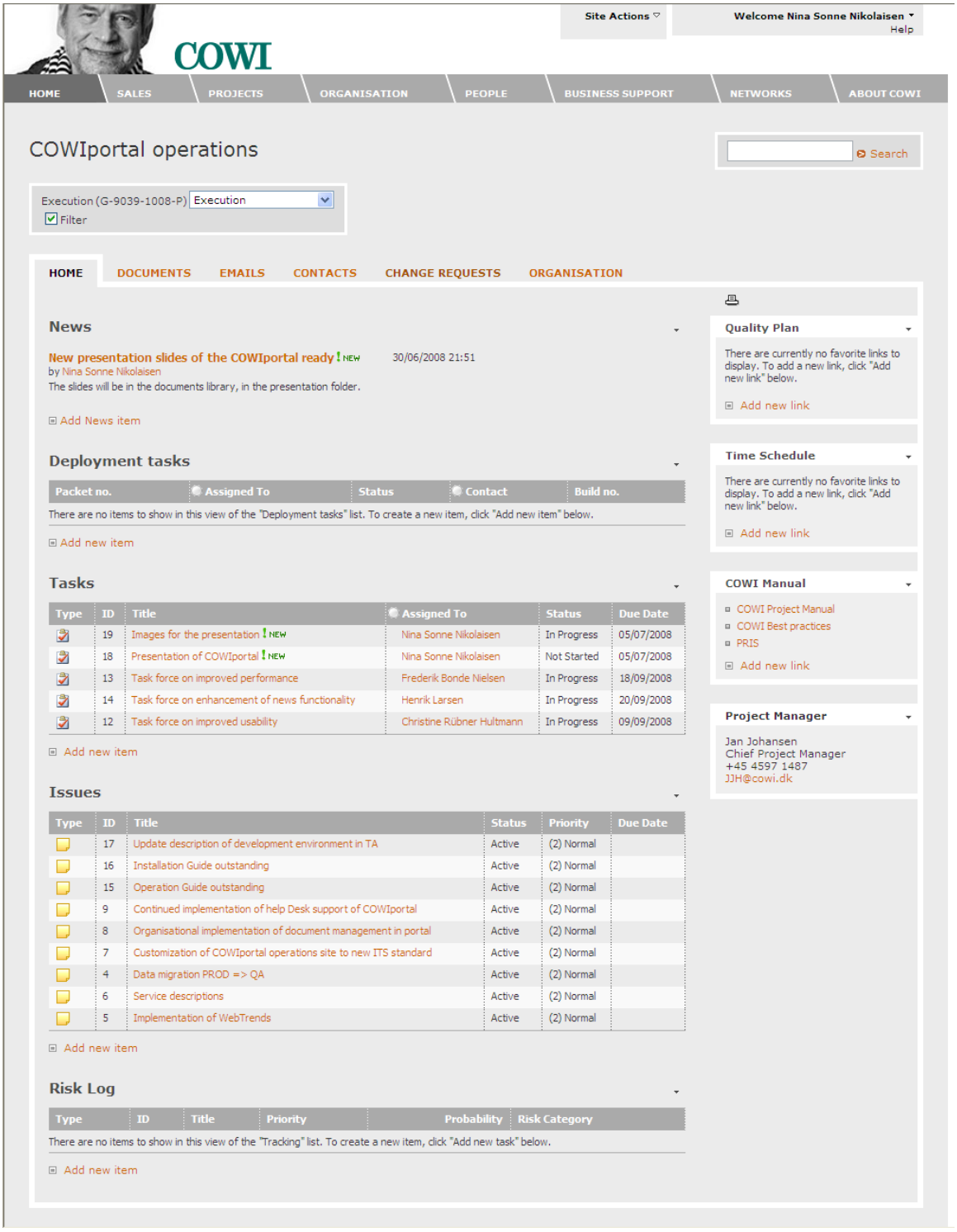
Basic features

- **Targeted communication:** News can be published from any site and will be seen on the front page of the COWIportal homepage by all employees in the target group. This news replaces e-mails to large groups. The target group (audience) is by default the site’s members—such as all employees in a department—but any audience or group of audiences can be chosen. There is an audience for each department, each business unit, and each company, as well as one for the entire group. There are also cross-over audiences from specific organizational units and geographical locations (such as all employees in the city Århus from a certain department) and from organizational units and a specific function (such as all managers in a business unit).
- **Subscriptions:** A user can also subscribe to news from selected sites. This news will also appear on the homepage under *My selected news*.
- **Events:** Events can be published from the event calendar on any site and will be seen on the homepage by all employees in the audience. Events are published using the same affiliation as news.



Pictured: The full calendar. All events can be seen on the site's *People* page in the event box to the right. Everyone can see events for their audience group on the portal's homepage. The default audience for a news item or an event is the site's members, such as the entire business unit, but any audience can be chosen from any site.

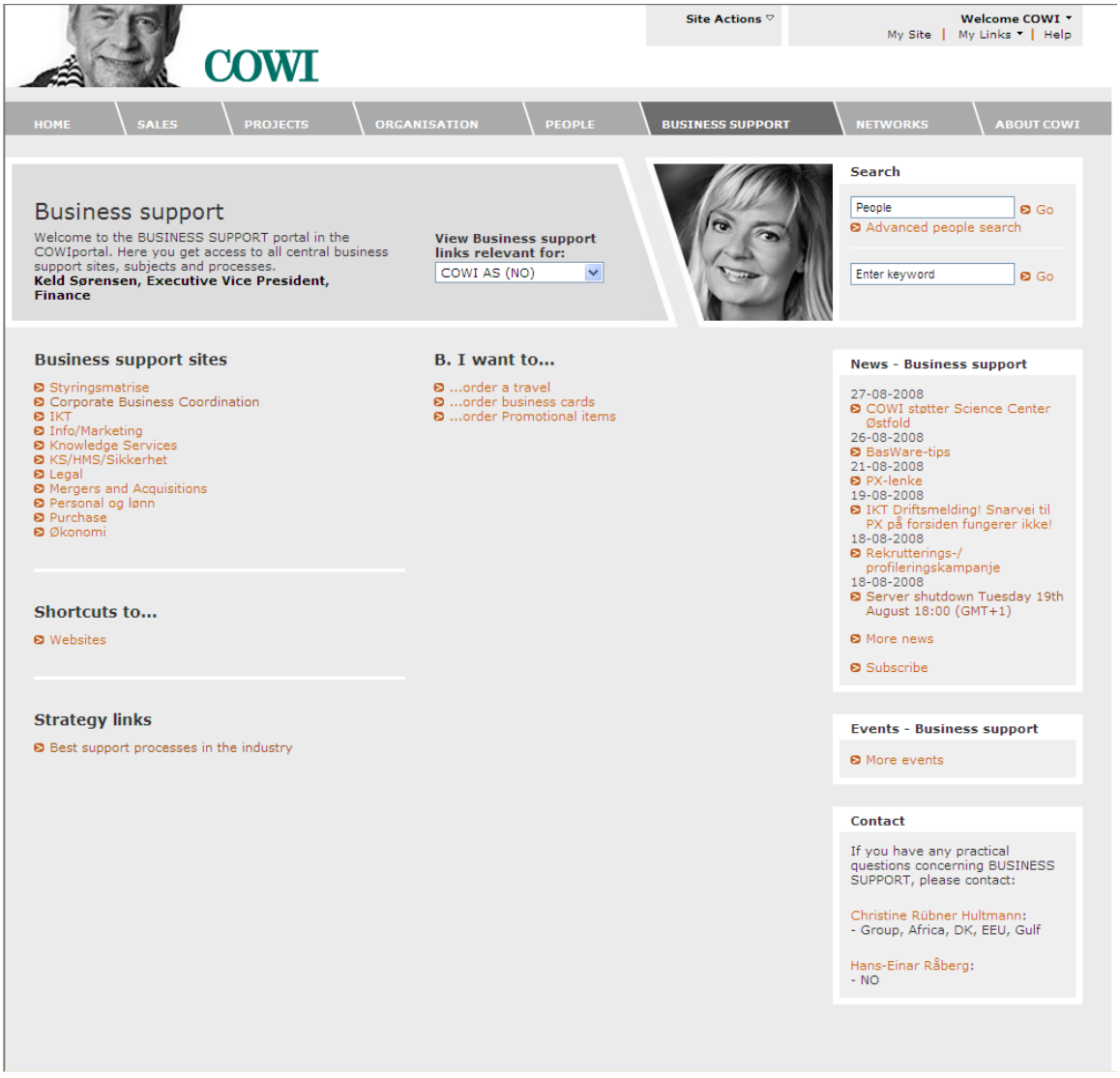
- **Tasks.** Tasks can be made on any site and will be seen on the homepage by the person it is assigned to.
- **Alerts.** Alerts can be created by the user on any item or list on the portal and will be shown on the homepage.
- **Shortcuts.** All users automatically have homepage shortcuts to all sites on which they are members; these *My COWI sites* include project sites, network sites, and organizational sites. The homepage also automatically displays shortcuts based on the user's audience affiliation.
- **People search.** It is possible to search for people or competencies across the COWI Group. This functionality helps managers find competencies across an entire group, helping them to staff projects with the right people.
- **Project sites.** COWIportal lets employees work on projects with colleagues across the company, as well as share selected documents, news, task, and issue lists with external people (customers and partners).



Pictured: Project sites offer default features that project managers (who are the site administrators) can change or delete. The site's front page shows the task, issue, and risk lists, along with short news items and links to relevant project documents, such as the quality plan and the time schedule. The boxes *Quality Plan*, *Time Schedule*, and *Project Manager* are part of the template and must be filled in by the project manager. On a project site, users can

store documents (and other files), Web pages, and e-mails. The site automatically generates a list of project members with their contact information (referring to their profile page). The project site template is available in different languages.

- **Graphic visualization of processes.** These graphics support intuitive understanding of business processes, including sales and marketing activities, recruitment, and travel.
- **Customized business support materials.** Links to business support materials located on the site's "front pages" or section main pages are customized based on the user's location. Users always see a mix of global links that everyone in their group sees, as well as links specifically aimed at their COWI region. They can see links from a different region by selecting that region in a drop-down menu.



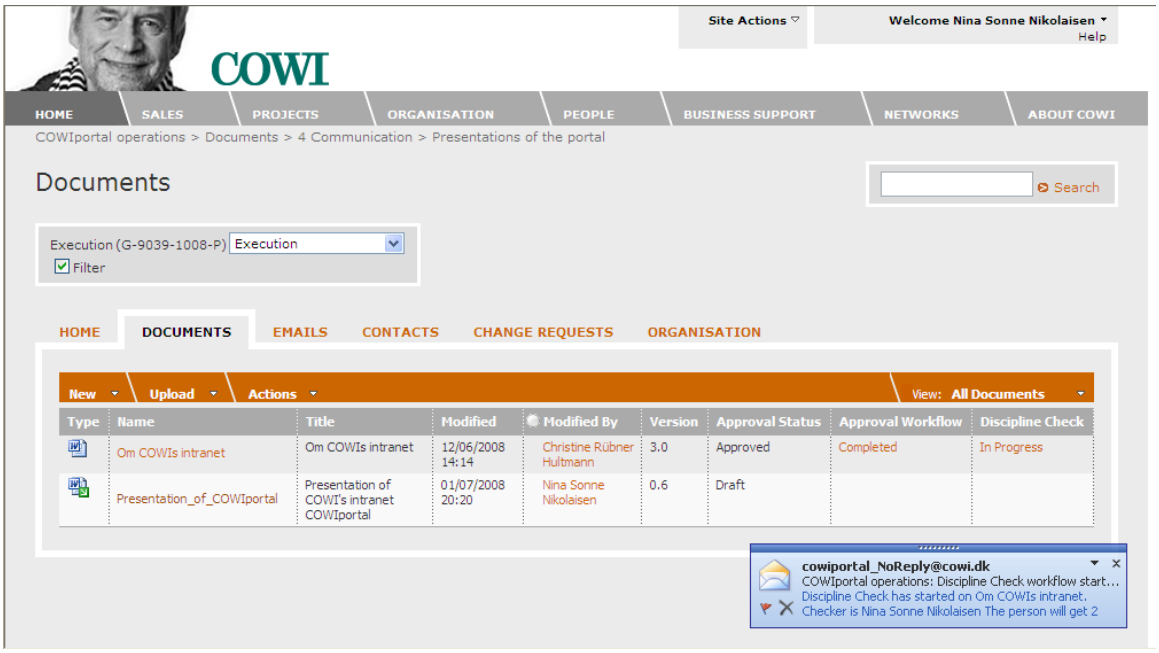
Pictured: A Norwegian version of a main navigation page.

Collaboration Tools

Project collaboration is enabled on the new COWIportal through project sites. These project sites are the new common project collaboration platform for all companies within the COWI Group. “They strongly support COWI’s one-company-network strategy by making it possible for any project manager in the COWI group to include any employee, regardless of geographical location, as a member of the project team with full access to the project site of the project,” says Johansen. “Thus, the entire pool of specialists within COWI's more than 4,000 employees is available to any project manager in COWI.”

External parties can be included in the project group, making the portal the central collaboration point for the entire project. Johansen says the vision of the project site is to provide the project members with a collaboration platform that provides access to all relevant data, tools, and functionalities required to carry the project from beginning to end.

The project sites include robust document management functionality to support collaboration, including version-control management and workflow functionality. Multiple team members can collaborate, produce, control, and approve documents. This collaboration functionality is enabled through SharePoint with customizations by the COWI team.



Pictured: A document library. On a project site’s document library, users can create documents in COWI's own Word templates. They can also see whether a document is in draft status or has been published. A user with read-access to the project site—such as a client—will see only approved documents, while site members with "contribute rights" can see draft versions of documents as well. When a document is ready for approval, it is send to workflow: first to *Discipline check*, then to *Approval workflow*. The person who is asked to check/approve the document receives an e-mail (as in this screenshot) with a link to the document. It will also appear as a task in the person’s homepage task box. Users can always restore an earlier version of a document (this also goes for Web pages throughout the portal).

Collaboration Functionality

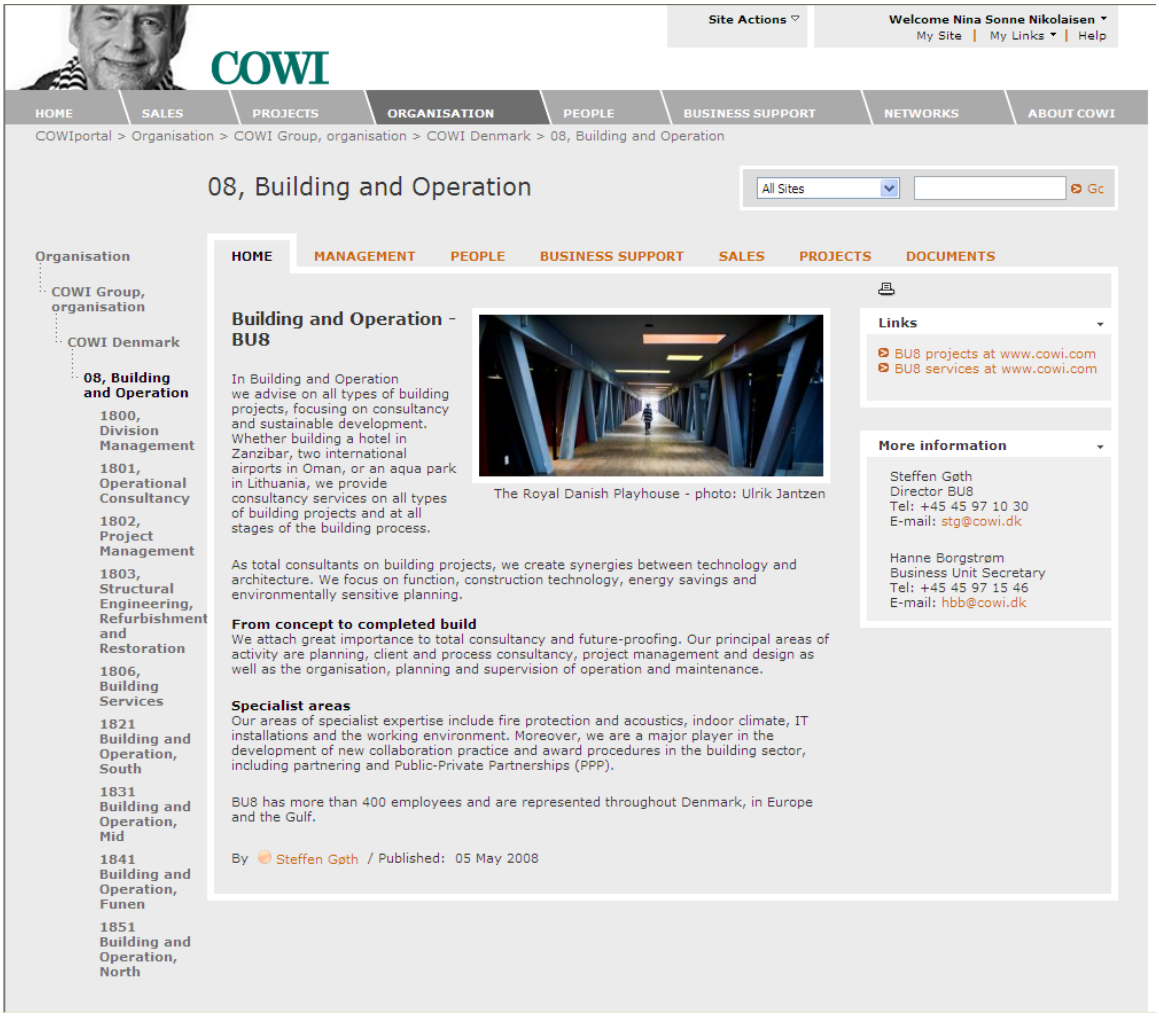
- Marking each piece of information on the project site with phase information (documents, news, and so on).
- Enabling simple filters to show only information relevant for a given project phase.
- Task management functionality to support assignment and task tracking. This gives each project member an overview of the task assigned as well as an overview of all the tasks defined in the project. It also allows task visualization in Gantt views.
- Contact and member lists provide an overview of all project members and stakeholders.
- List functionality lets team members assign and track issues, risks, and so on. The lists can easily be adapted to a project's specific needs.
- Functionality for giving external parties (such as customers, business partners, and authorities) access to selected parts of the project. Project managers can control the access level (rights and project site sections) in detail, right down to the document level.

Knowledge Management

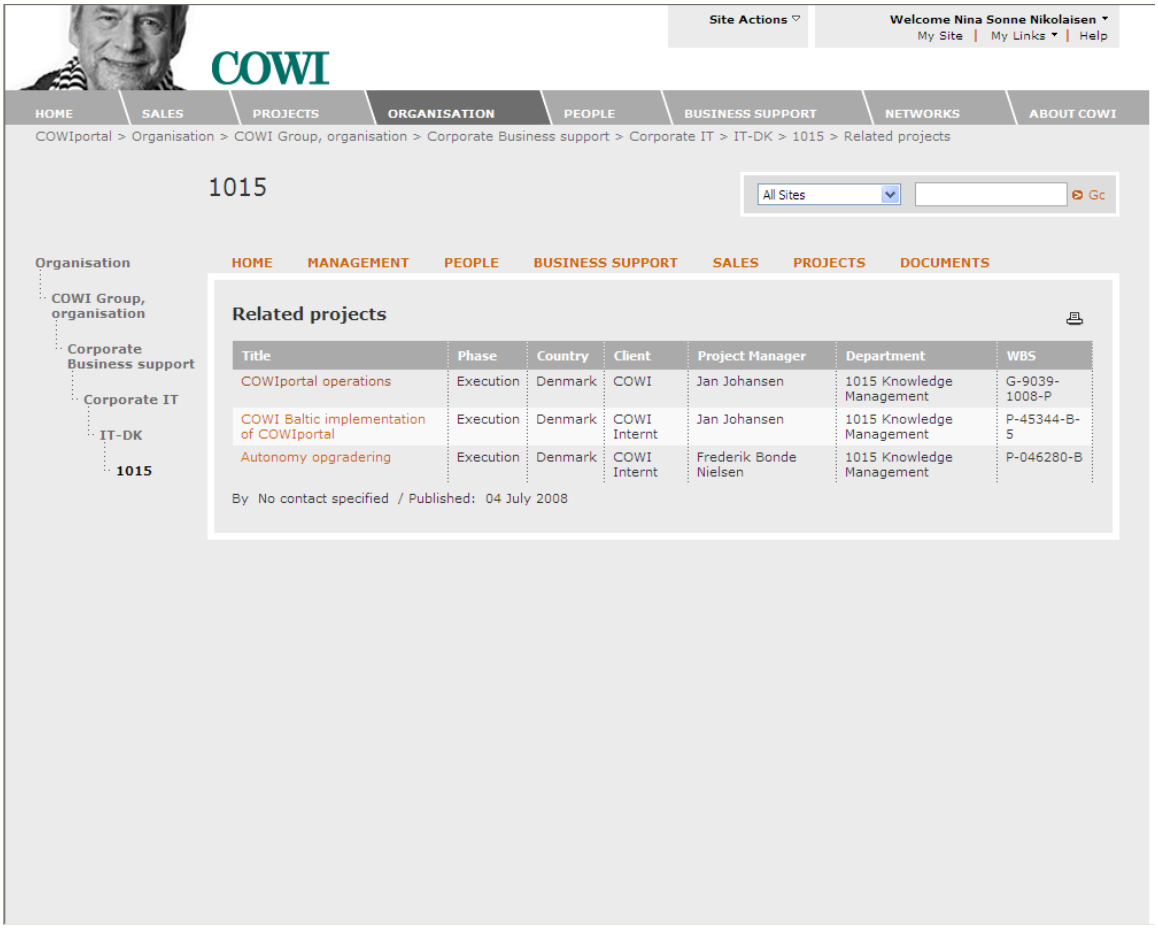
"We consider the entire COWIportal a knowledge management tool, as it is a strategic business tool," says Hultmann. "The information architecture of the portal ensures that professional knowledge is not hidden on a department site, but shared on network sites. Likewise knowledge and documents about customers are shared on sales sites and all project documentation is shared on project sites."

Department sites on the COWI portal serve only to support the particular organizational unit's management processes and people-related issues. Department sites contain links to the project sites, the sales sites, and the network sites that the people in the department work on. All department sites have an automatic list of department-related project sites that users can sort according to phase, country, customer, project manager, and so on.

The portal also links databases through which the organization handles customers, project references, CVs (linked to the *Find People* application), and best practices. These are directly accessible from relevant places on the portal; for example, every project site is born with links to the best practice database, the project reference database, and the project manual.



Pictured: An organizational site on the COWIportal. The front page serves to present the unit, division, or department to the rest of the organization. The same is true of the front pages of network sites. When a front page is edited for the first time, the editor must fill in controlled keywords to make it easier to find the page in the search engine.



Pictured: A list of *Related projects*.

Data Visualization

COWI uses SAP as the central ERP system for keeping track of project financials, such as budgets, actual person-hour costs, and expenses. A proof of concept for visualizing this data as business graphics (curves) in the project site was successfully done using Excel Service. Johansen says this functionality will be further enhanced and implemented in production in 2009.

At COWI, data visualization tools are in high demand. "Many project managers have expressed a wish for a graphic visualization of the progress of their project economy," says Johansen. "This tool will make it much easier to have a quick overview, rather than a detailed report in SAP."

LESSONS LEARNED

Following are some lessons learned in developing COWIportal.

Jan Johansen, chief project manager:

- **Aim for easy access and good performance.** "The two most important things for users are access and performance," says Johansen. "They seldom mention it in interviews, but it is the first thing they complain about if it does not work." As an example, Johansen sites the difficulty of providing access in Africa as a show-stopper for making the portal truly corporate. "We also

experience some performance problems at server level," he says. "Microsoft has helped us improve the performance, but it is still an important focus area for us. The importance of the infrastructure and the setup of the servers is thus of huge importance to the user experience."

- **Simplify design features.** "Two design features that can harm performance are excessive styling and roll-ups. Roll-ups from sites—of news, events, and tasks—can be made in many ways," he says. "It cannot be recommended to have every Web part on the front page check every site in the portal every time a user clicks on the front page of the portal. In order to make more efficient roll-ups, caching can be used to make the workload easier and the homepage load faster."
- **Avoid the impulse to overdesign.** "It is also recommended not to make the styling too heavy and different from the original Microsoft look," says Johansen. "Some changes 'cost' more than others, so take advice from the IT developers when developing the graphic design." One way the team learned this lesson was in the additional costs associated with designing angled (rather than vertical) buttons for the sites' main navigation.
- **Avoid complexity in document management.** Another lesson learned at COWI resulted from the difficulties users experienced with using SharePoint document management. "It is not intuitive, and some very basic operations—like saving an attachment from e-mail directly to a document library—are very difficult," says Johansen. "We are therefore considering introducing a third-party product to make document management more user friendly.

RESULTS / ROI

Though the company has not calculated a specific ROI for the portal project, the team has taken stock of improvements in COWI employees' ability to access information effectively.

Nielsen says that once the COWIportal has been rolled out to the entire organization—and all employees are using it to work on projects—they can easily sort the projects list to get an overview of:

- all projects being carried out for one specific customer or in one specific country,
- all projects related to one service area across the group and across the world, and
- all pipeline projects and proposals to one specific customer or related to one service area.

"It will also be possible by using the *Find People* function to search for any specialist in the COWI Group," he says. "We use the same system of classification with professional keywords for projects, people, and services. We have our own instant messaging solution that will be rolled out along with the portal and which will make it possible to chat or make an instant video Web meeting with a colleague elsewhere in the COWI Group. Thus, the portal will make increased communication easy between different geographical locations within the group."

Further, he says that the COWIportal is perceived by top management as a necessary tool to achieve COWI's strategic goal of working as a one-company network. Currently, achieving that key goal is more imperative than measuring the COWIportal's achievement with hard numbers.

Deloitte Touche Tohmatsu (DTT)

Using the intranet

Deloitte Touche Tohmatsu (DTT) is a network of independent member firms that provide audit, tax, consulting, and financial advisory services. About 165,000 professionals work for member firms in 140 countries.

Deloitte refers to one or more of Deloitte Touche Tohmatsu, a Swiss Verein (association), and its network of member firms, each of which is a legally separate and independent entity.

Please see www.deloitte.com/about for a detailed description of the legal structure of Deloitte Touche Tohmatsu and its member firms.

Headquarters: Because DTT is a global network of independent member firms it has no single headquarters.

Number of employees the intranet supports: 165,000

Locations: Deloitte member firm people use the intranet in Deloitte offices in more than 140 countries around the world.

Annual sales: Aggregate member firm revenue for fiscal year 2008 was US$27.4 billion.

Design team

Entirely in-house.

Members

Full-time dedicated resources for DTT Communications: Divyesh Jevtani, Deloitte Resources (DR) operations coordinator; Rachel Flanagan, DR editorial manager; Jill Brower, DR editorial specialist

Part-time resources for DTT Communications: Jessica Yi, DR content manager; Nabeel Zeeshan, online graphic designer; Gretchen Neuzil, online graphic designer; Karen Frankola, director, internal communications and creative services

(This list includes only the DTT Communications team, which maintains the homepage and pages for major DTT initiatives.)

SUMMARY

The intranet for Deloitte Touche Tohmatsu (DTT) is a vehicle for knowledge sharing and seamless integration. The people across the organization in the design group found a way to thoughtfully balance autonomy between groups and locations across DTT, but still answered the need for sharing information and having a seamless interface across the entire intranet.

“Going green” is a term we hear from many responsible organizations today, and Deloitte is no different. The intranet is one way to share knowledge well and save trees in the process.

Starting on the homepage, it is uncluttered, but the variety of news items still gives the sense that things are happening at the organization. Stories are updated two to three time per week, further indicating movement at DTT.

A current story is summarized in the content area’s main section, and includes an accompanying image and a link to the full story. More news stories appear as links just below this main story.

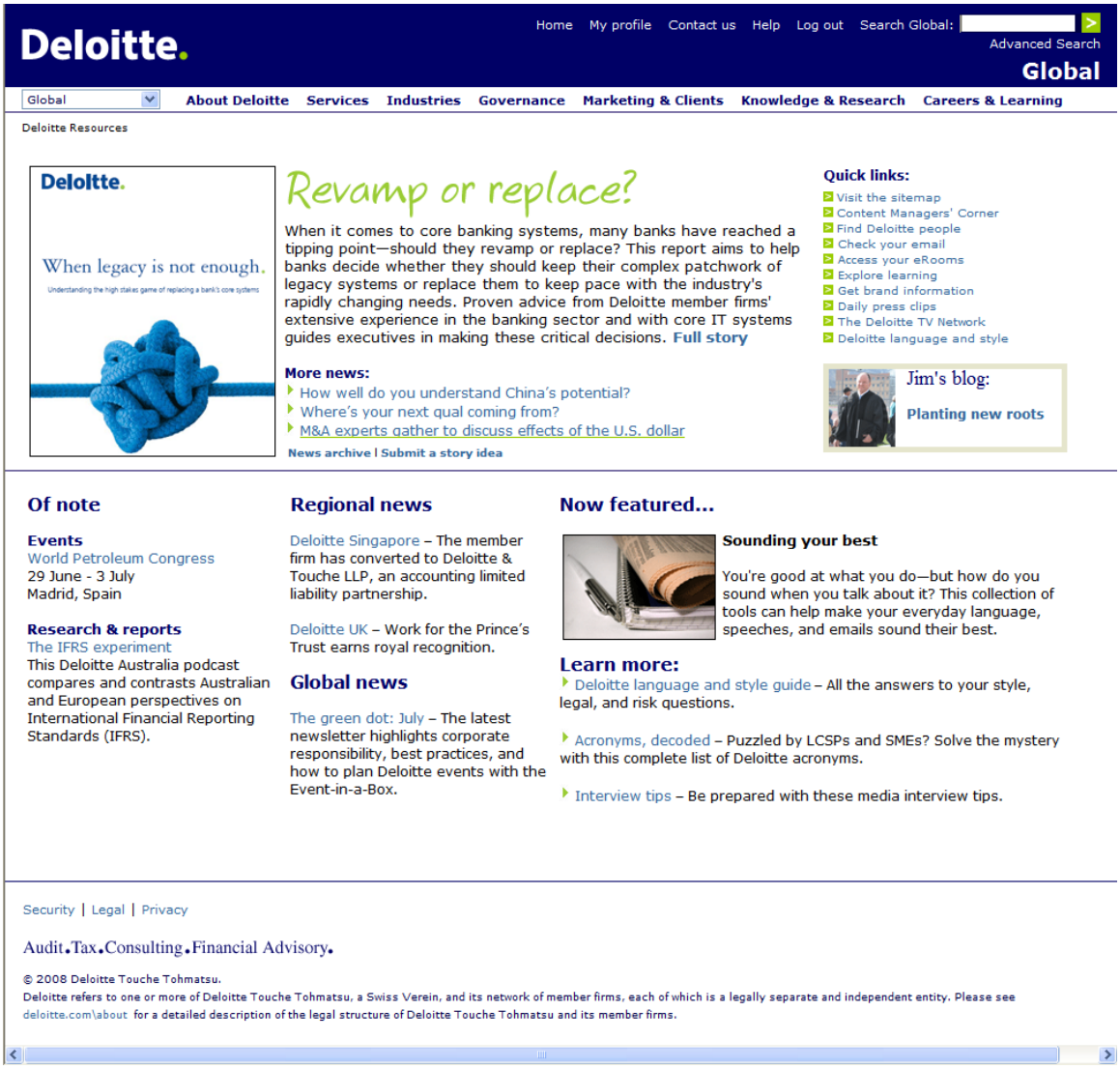
Quick links on the right provide access to the DTT employees’ most commons tasks.

Just below these links is the CEO’s blog, named *Jim’s Blog*. Using the CEO’s first name offers a nice personal touch, and showing his picture also helps draw people in. To read on, users can click the current blog’s title.

In the homepage’s secondary horizontal position, users can see an upcoming event with the date, location, and event name.

The *Now Featured* section highlights a specific theme and points employees to various resources about that particular topic. For example, it might link to an article, a video, and a related tool.

The *Regional News* and *Global News* sections round out the information fed to users as they first hit the site.



Pictured: The Deloitte Touche Tohmatsu intranet homepage is clean, yet gives people links to all of the big news they need.

When users click through to the CEO's blog link on the homepage, they see Jim Quigley's latest message. This periodic blog helps the large staff to feel communicated with personally. It focuses on a variety of topics, ranging from the CEO's travels to thoughts on tools Deloitte professionals might be interested in using.

In the example blog below, the CEO dexterously includes some good information for the staff. First, he draws readers in by telling them about a personal experience he had at an airport bookstore. You can almost picture him at JFK, leafing through this book. He also mentions his own background in manufacturing, showing that he doesn't mind sharing facts about himself with colleagues. He then tells a little about

the book he bought and offers his interest in and experience with the book's topic: wikis. He posts a picture of the book's cover, basically recommending the book as an interesting read. The book seems a lot less abstract when the cover is right there.

He then offers a call to action that could actually help the organization. He asks if people have ideas for using wikis to help their client business. And he specifically asks *"What do you think? Could we put wikis to good use at Deloitte? If yes, then how?"*

The entire blog is only seven short paragraphs but that is plenty to make the points he wants to make.

As this is not a real-time blog, there is no form to post comments. Rather, readers can click on the *Post a Comment* link, which appears as the first link just after the CEO's posting itself. This opens a new e-mail message in the user's Outlook. This message is automatically addressed to the CEO blog mailbox with the subject line of that blog entry's date.

The comments are sent to a CEO blog mailbox that is maintained by several members of the intranet team. They check the mailbox several times daily and manually post all comments—without editing them—into a content page. If there is a particularly sensitive portion of a comment that team members feel they can't post as is, they e-mail the poster and ask that person to revise the comment so that they can post it.

Staff members can view all comments for each blog using the *View comments* link. It's helpful that the actual number of comments appears in parentheses next to this link.

Once he views the responses, the CEO sometimes responds to all of them in one large post, referring to various topics raised in the comments received. The content editor manages blog subscriptions and sends out an alert when a new blog is posted. Users can also click the *Subscribe to the blog* link to get e-mails about newly posted blogs.

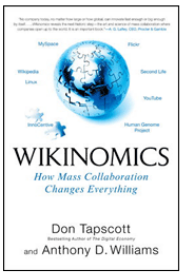
CEO corner
Best of Quigley
Jim's blog
Recent entry
Archive
Subscribe to the blog
Submit future blog ideas
Jim Quigley's bio
E-mail Jim

Jim's blog

Wikis – A tool we could use?

22 January 2008

When traveling through airports, I like to wander into bookstores to see what people are reading these days and possibly buy a title for my next flight. One of the latest titles I picked up was *Wikinomics: How Mass Collaboration Changes Everything* (download the summary at Books 24/7 off the Global Learning homepage). Have you read it?



I have been interested in the wiki / mass collaboration idea for some time and I use Wikipedia on occasion. Also, as an old manufacturing guy, I understand the concept of mass collaboration and how it relates to product customization and greater value for customers. At Deloitte, the collective brainpower and knowledge of our 150,000 professionals is a huge competitive advantage, provided we harness it effectively for our clients. Clients want the best thinking of *all* of us, not just their LCSP or client team.

The book's premise about mass collaboration was fascinating and the case studies were interesting. The authors used a variety of examples - open source software, Wikipedia, and Geek Squad (which accidentally discovered that video games are great for collaborating) – to illustrate the power of mass collaboration.

For us, the notion of industry wikis is very interesting to me. I spend a lot of time with our clients and they consistently want to know what is happening across their industry. Clients believe that they become myopic – focusing primarily on the inner workings of their organization and losing sight of valuable industry trends and best practices. And so they look to us for broader, and increasingly global, industry insights and perspectives.

We are already good at producing deliverables that showcase our best thinking. Just look at our exemplary methodologies, POVs, case studies, and external publications as proof points. But I wonder if we could rachet up the level of mass collaboration and deliver even more of our global best thinking.



I am not exactly sure how it would work technically or from a process perspective. But I think we could probably solicit global contributions and then have an editorial board to determine what is going to be used externally or distributed internally to share with clients. So we learn from each other, while also producing our collective best thinking for our clients.

I am keenly interested in the "Net" generation's reaction. I used industry wikis as an example. Maybe you have additional ideas about using wikis for our business. I imagine some of you have contributed to non-Deloitte wikis or participated in other forms of mass collaboration. What do you think? Could we put wikis to good use at Deloitte? If yes, then how?

Post a comment | View comments (49) | Subscribe to the blog | Quigley unscripted

Response to comments:

Thank you for your thoughtful and detailed responses to the Wikinomics blog. I appreciate all of the articles, links, and information you sent. The answer to my question about using wikis at Deloitte appears to be "Yes." Based on the feedback, it also appears that wikis already are being tested and used throughout the Deloitte network.

The consensus seems to be that we can put wikis to good use. However, as some of you pointed out, we face some challenges. What I am coming to understand is that wikis are largely a grassroots tool, meaning they thrive when driven by everyday users, instead of from the top. In some ways, this is in contrast to our need for a certain level of informational control so that we are consistent and correct about any intellectual capital that we produce internally and externally.

One idea I read seemed like a good option to balance the need between the free flow of ideas and intellectual rigor. The poster suggested having an internal wiki to be used for gathering information and collaboration, and then a production/client facing site controlled by an editorial board. The internal wiki allows for creativity, while the production wiki allows for information created by consensus.

I would like to forward some of the information from your posts to industry and service line Global Managing Partners so they can see how wikis are being used. I also will ask members of my immediate team to experiment with them so that I can be better informed. We do a lot of collaborative work that lends itself to using a wiki.

As it happens, I met one of the Wikinomics authors, Don Tapscott, at the World Economic Forum. I told him I enjoyed the book and respected his concept of mass collaboration. He proposed that we schedule a call to continue our discussion as we had limited time and a full agenda in Davos. I look forward to my talk with Don.

Again, thank you for taking the time to respond and educate me about wiki use within Deloitte. I think this blog in particular demonstrated the power of mass collaboration. Look at all the information that was shared – literally from across the globe. Where this all leads remains to be seen, but I am certainly going to continue this dialogue at the leadership level and that is because of your ideas and passion.

Jim Quigley, New York, NY, U.S.

Blog archives

Published Date : 28 April 2008

Security | Legal | Privacy

Audit.Tax.Consulting.Financial Advisory.

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Pictured: The CEO's blog posting is personal and has a call to action. Users can respond via the *Post a Comment* link, and read other comments via the *View Comments* link.

This is one of several good ways that Deloitte professionals share and communicate with one another using the intranet. Deloitte's 165,000 professionals worldwide have deep local expertise that they need to share with others around the world. In particular, they must communicate what, specifically, they did to make a client engagement a success. This is priceless information that should be accessible across the organization.

More than 100,000 Deloitte professionals work directly with clients and are typically located at client sites. As a result, these professionals are rarely in the same country together, let alone the same room. Realizing this, the intranet team created a tool that gives all users quick access to detailed information about previous work with clients. And each professional can access this information from wherever he or she is that day.

The *Deloitte Qualifications Database* is a comprehensive, central repository for past engagement information and associated materials from across all regions, functions, and industries. It houses more than 11,000 qualifications. The database collects project information from all of DTT's member firms with the goal of reducing the amount of time people must spend looking for the right qualifications to use in proposals.

The engagement write-up includes summaries of client issues, scope of work and project approaches, value delivered, and the names of project team members.

Even the best new intranet features can flop if they are initially hard to find, hard to use, or poorly advertised. This intranet team knew better. To showcase the *Deloitte Qualifications Database* at launch, the team offered a feature story on the global homepage. The story explained the application and suggested ways that the average Deloitte professional could use it.

In fact, whenever there's a relevant new feature on the intranet, the team always writes an interesting, people-oriented story to lead users to it.

On the main page for the intranet's *Qualifications* section, it explains why a person might want to use this area. For example, the first paragraph mentions that it can "help your practitioners find examples" and "speed up the process of getting qualifications."

Following the prose, the five bullets call out the reasons why the database will help and expedite real work. Examples here include "Bring the most capable teams to our clients" and "Faster development of higher quality proposals."

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)

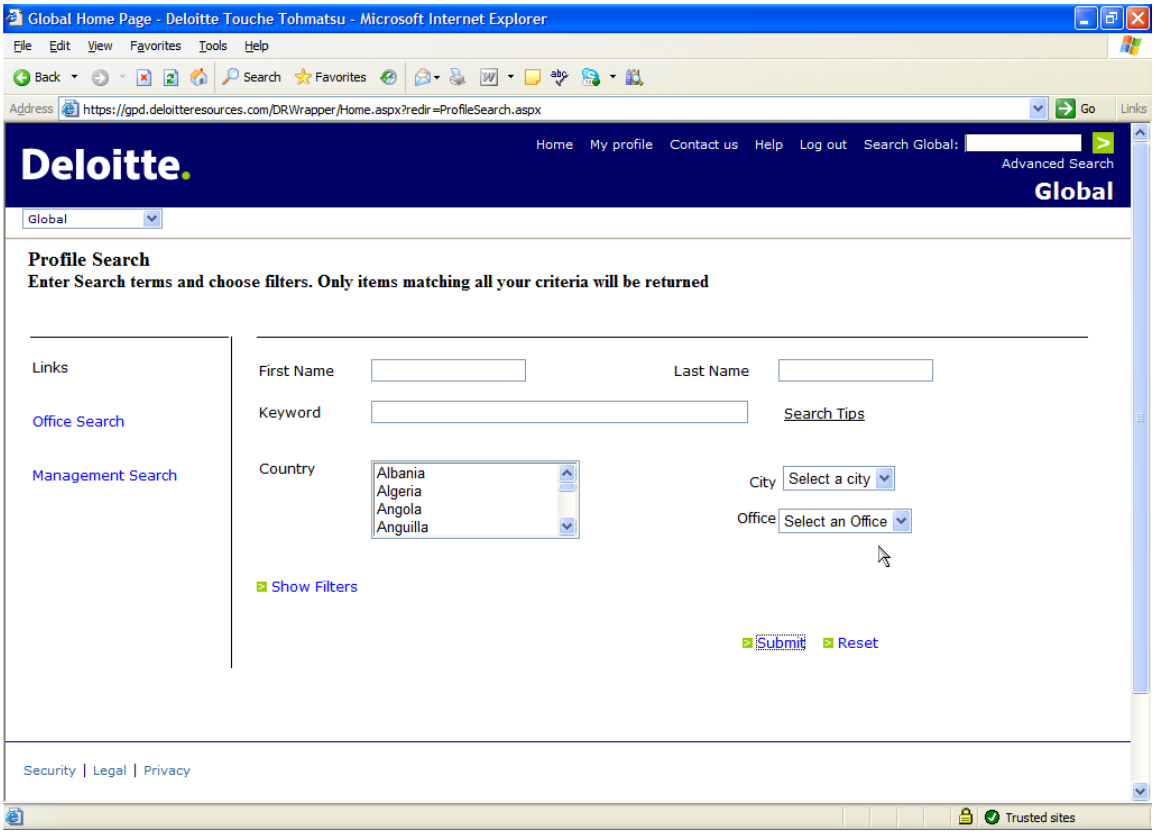


Pictured: The *Deloitte Qualifications Database*. This comprehensive, central repository features past engagement information and associated materials from across all regions, functions, and industries. The main page explains why Deloitte professionals should use this area.

This goal of connecting people in beneficial ways carries right into the staff directory on the DTT intranet. This interactive directory, which features photographs, resumes, and experience provided by Deloitte member firm professionals, allows users to quickly find contact information for their colleagues and engage in networking opportunities. It also lets individual professionals edit their own profile at any time.

Users can search by keyword, name, and location to find the right people for their situation. The directory can be easily accessed via the *Quick links* on the homepage.

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



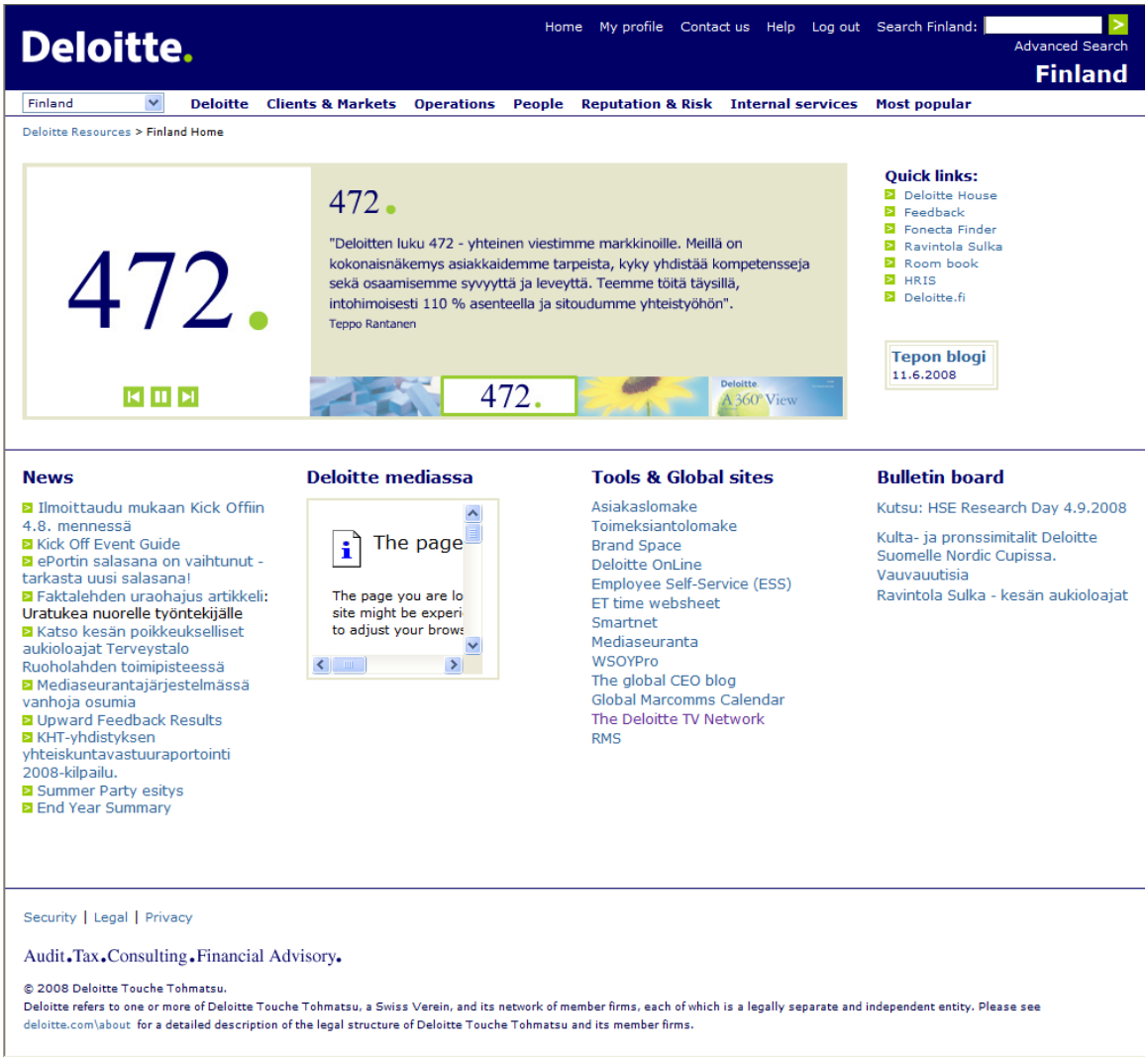
Pictured: Users can search the staff directory by keyword, job, location, and name.

Deloitte member firms around the world host their own intranet sites featuring content that is most relevant to them, in their local language. DTT does not control which content appears on the member firm intranet sites. However, it does respectfully lead by example, and makes it easy for member firms to follow the brand by providing: 1) wireframe templates, 2) examples of best practices (tools, layout, and so on), 3) stories they can post, and 3) and plug-in content. For example, to encourage member firms to put the CEO's blog on their homepages, this inventive intranet team created an HTML-ready promotion box, so each member firm could easily and consistently promote the blog.

While the overall content of the member firms is localized, the look and layout are definitely part of the DTT intranet's look and feel. Member firms follow Deloitte brand guidelines and use templates created for them. These templates keep some elements the same (global navigation and search stay in the topmost area or pages) and the local navigation looks the same, but offers choices related to the particular section. The *Now Featured* area has its own particular news item and images. Quick links and the rest of the news are also localized. Various areas at DTT might have their own information, priorities, and identity. But having the same look and layout helps everyone feel like they work for the same organization.

Certain sections have restricted access in order to comply with privacy regulations set by local member firms' security policies.

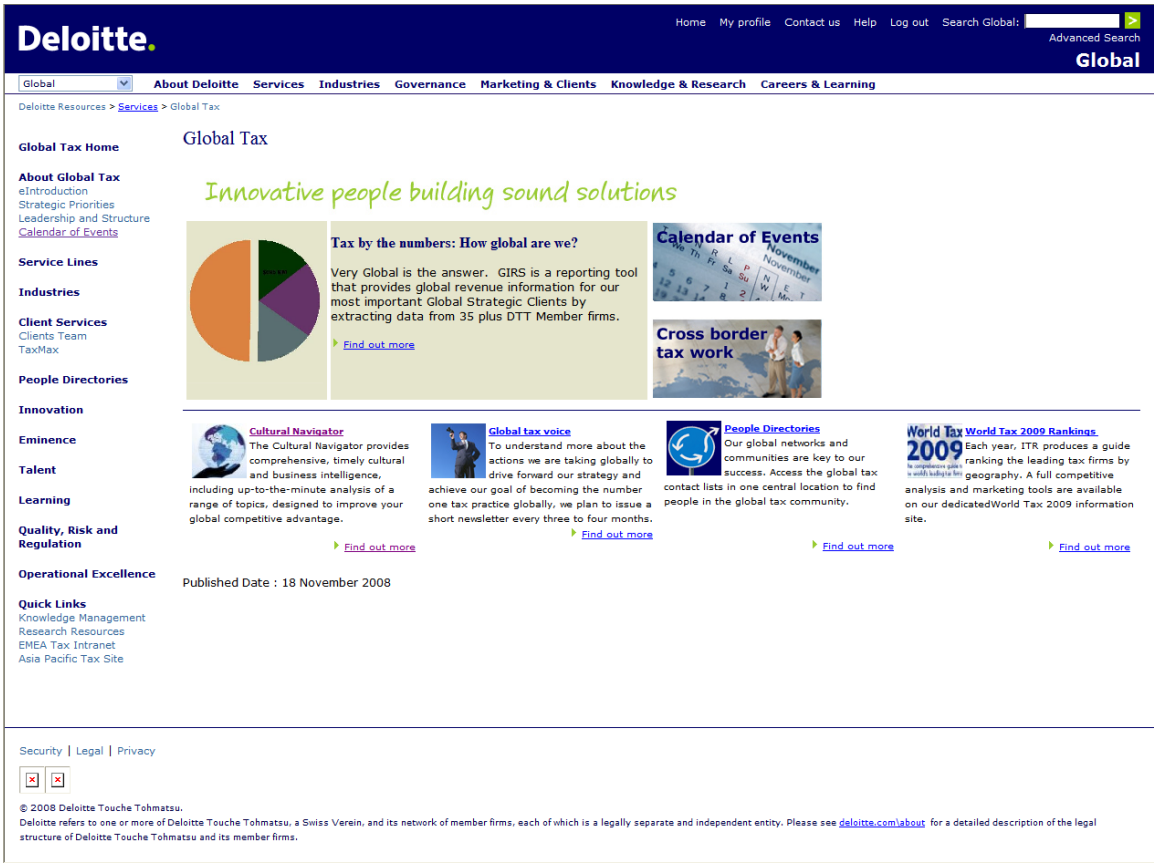
10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: The main page of the intranet's *Deloitte Finland* section exemplifies a typical member organization homepage. Notice that the look is very similar to that of the intranet's homepage.

Member firm and DTT intranet teams do a good job of keeping design consistent across the organization. In another example, all of Deloitte's global competencies (tax, audit, consulting, and financial advisory) host a homepage on the Deloitte Resources (DR) platform. Each section offers content that is targeted directly to their particular group. But, like the other intranet pages, the look is simple, using muted accent colors and columns for information. The large featured story area in the example below shows a chart of how global the tax practices at the organization are. Users can read more, but this main story area on the page draws the group's people in with a topic they care about, and leads to more information. The rest of the page incorporates links and information to make all tax-related information accessible. The global navigation at the top remains persistent, so even specific target groups can easily navigate back to the main area of the DTT intranet. Offering this consistent design makes it easy for users to move all around the site.

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: Some DTT intranet areas are created for specific user groups and house information relevant to them. But the areas still look and act like the rest of the intranet, so moving around between sections is not jarring.

Deloitte professionals must stay abreast of constant developments and cutting-edge technology. This is imperative to staying on the forefront of enhancing the overall client experience. To aid in this, the DR homepage hosts news stories.

The example story below features a new forensic lab in the Deloitte Canada member firm, sharing innovative best practices across Deloitte's global network. The photographs of the actual lab help to tell the story, and make it more real than just the written word. But, in this case, the written word is also colorful and telling. The first sentence of the article sucks you in with a riddle. The second paragraph gives the answer, careful not to dissuade or bore users.

Concise headings such as *Working with the Global Network* and *Sorting through digital chaos* describe the paragraphs below. And the blue bolded look of the headlines is different enough from the body text, but not too distracting, so users can easily scan the page for topics of interest.

Colorful quotes and simple writing round out the article and meet all the standards for good Web writing.

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)

Deloitte.

Home My profile Contact us Help Log out Search Global: Advanced Search

Global

Global About Deloitte Services Industries Governance Marketing & Clients Knowledge & Research Careers & Learning

Deloitte Resources

If there's evidence, we will find it.

Exploring Deloitte Canada's new Analytic & Forensic Technology lab

What has a capacity of 250 terabytes, has an area of 8,200 square feet, can analyze 6,250 laptops simultaneously, and is larger than most law enforcement agency centers in Canada?



"We are in the digital chaos management business," notes David Stewart, National Partner for Analytic & Forensic Technology Canada. "We focus on the details and go beyond the obvious."

It's Deloitte Canada's new Analytic & Forensic Technology (AFT) lab. Opened in March of this year in Toronto, the AFT lab is the largest private forensic lab in Canada and incorporates state-of-the art technology for conducting forensic investigations and analysis.

Sorting through digital chaos

"Due to market demand and the success we were having in this area, we outgrew our old premises," says David Stewart, National Partner for Analytic & Forensic Technology Canada. "This new facility will enable us to grow further and meet the market demands of the litigation world."



Deloitte Canada's new Analytic & Forensic Technology lab, an 8,200-square-foot facility with capacity to analyze 6,250 laptops simultaneously, is larger than most law enforcement agency centers in Canada.

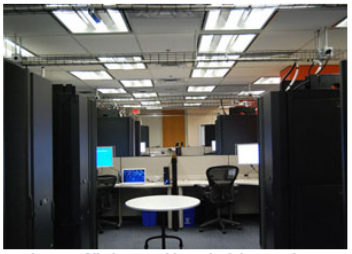
The space will certainly be put to good use: the AFT practice in Canada has grown from 5 to 26 people over the last two years, primarily due to the electronic data analysis requirements in corporate litigation. In fact, the group has worked for all of the national law firms in Canada.

"We are in the digital chaos management business," explains Stewart. "We search for and find digital evidence in a company's data files or make sense of large data sets as it relates to those issues or litigation matters identified by our clients. To summarize, we focus on the details and go beyond the obvious."

Deloitte Canada truly has a competitive advantage, reports Stewart, "Our new lab is second to none in Canada. With our advanced forensic capabilities, we are not only delivering pure forensic analysis, but we are enabling and expanding opportunities for other service lines within Deloitte. We have increased our share of providing services in the class action market, primarily due to our abilities to forensically collect, analyze, and host electronic data that meet the standards dictated by a court of law."

Working with the global network

The new AFT lab, located in the financial district of Toronto, is part of a global network of labs that work together to respond to clients' needs. The forensic labs currently operating around the world include those in London, Melbourne, New York, and Boston. The U.S. firm has recently commissioned a new forensic and data facility, which will be the largest AFT lab within the Deloitte global network.



Work space filled up quickly in the lab, as Deloitte Canada's AFT practice has grown from 5 to 26 people over the last two years, primarily due to the electronic data analysis requirements in corporate litigation. In fact, the group has worked for all of the national law firms in Canada.

"If there is a foreign client with a subsidiary in Canada, we can acquire and host the relevant electronic data in Canada, and provide 'anywhere and anytime' access to the information to those external clients," says Stewart. "Similarly, if we have a Canadian client, with a foreign operation, we can connect with our AFT colleagues within that geography and ask them to acquire the electronic data. It's a truly global solution with local client service."

More information

Video: Analytic and Forensic Technology in Deloitte Canada
A day in the life: Investigating from the shadows with forensic investigator Jennifer Boyce
Read Turning points, a guide that helps companies identify the threats of the new digital world and prepare for them.

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Pictured: The news stories on the Deloitte intranet are not just fluff. They help to keep member firm professionals appraised of new developments that can help them to better serve clients.

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)

To provide more variety to the news and touch more users, the intranet often includes personal stories about staff members. The *After hours* series features Deloitte professionals participating in interesting activities and events outside the office. Topics of past stories include working with not-for-profit organizations, competing for the Olympics, running triathlons, and other special interests such as rugby.

The example below shows a story about how one of the tax directors in Ireland spent three months volunteering at an orphanage in Russia. The question/answer style write-up is easy to scan because the questions are short and bolded. Photographs of the person with some of the Russian orphans she worked with, all smiling, warms hearts. In the staff member's final point, she urges others to volunteer as well. The intranet designers thus added a related link to the *Community Investment homepage on Deloitte Resources.* This helps people find other locations where they can volunteer as well.

At the end of the article, users are given the option to read more *After hours* articles. Also, if people have ideas for a new article for the series, they can click a link to e-mail the people in charge.

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)

Deloitte.

Home My profile Contact us Help Log out Search Global: Advanced Search

Global

Global About Deloitte Services Industries Governance Marketing & Clients Knowledge & Research Careers & Learning

Deloitte Resources

After hours

From tax director to mother of 135 kids



Despite temperatures well below the freezing mark, Evelyn Forde, a tax director from Deloitte Ireland, had a truly heartwarming experience when she spent three months volunteering at an orphanage in the Bryansk region of Russia. Now that she's back in Ireland, she keeps her hand and heart involved by working on special projects for the affiliated charity, To Russia with Love, an organization that helps Russian orphans.

How did you get involved with To Russia with Love?
I had read a newspaper interview with Debbie Deegan, who founded To Russia with Love, and something struck a chord in me, maybe because I know what it's like to lose parents at a young age. Volunteer work, especially with children, is something I always said I would do "when the time was right." Now that I was approaching 30 and had been promoted to Director in the Irish firm, it was now or never.

How did you prepare for your trip?
I sometimes joke that my research into Russia consisted of watching two James Bond movies. And to be honest, that is not too far from the truth. I learned one Russian phrase on the plane ride over: "Can I have the bill please?" I also received induction training from the charity and more vaccinations than I care to remember. In a way, there wasn't much more I could have done to prepare myself for the experience.

What was your fondest memory from your time in Russia?
Definitely meeting the children for the first time. They came running at me and literally threw themselves at me and hugged me.



What was a typical day like?
I helped the kids with their daily routine—getting dressed, eating meals, and going to school—and I taught English. It was a challenge, given that the orphanage houses 135 Russian children, ranging in age from 6 to 17 years old. The biggest part of my job was encouraging the kids, giving them hope, and showing them that someone is in their corner, rooting for them.

What was the most challenging part of your trip?
The language barrier. When the kids were sad, upset, or worried about something, I felt quite helpless and frustrated when either I couldn't understand what the problem was or I didn't have the words to comfort them.

What did you take away from the experience?
Aside from a great deal of mutual affection, my project management, negotiation, and communications skills increased tremendously. Also, out of necessity, I picked up conversational Russian very quickly since no one else spoke English. I found that doing things like arranging buses for an outing or setting up a photo exhibit was particularly challenging without a grasp on the language.

Now that I am home, I'm grateful for ordinary things, such as taking a nice shower, reading a daily newspaper, and internet access.

What do you want to tell others who may be considering doing volunteer work?
Just do it. It can be hard sometimes but the rewards are worth it.

More information
Community Investment homepage on Deloitte Resources

More in the *After hours* series
A consultant by day, Andrew Pellow dreams rugby by night

Send ideas for future *After hours* stories to Jill Brower

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Pictured: The *After hours* news series presents stories of Deloitte professionals doing interesting things outside of work. The above example is an interview with a tax director who volunteered to help orphans in Russia for three months.

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)

The *Deloitte TV Network* allows Deloitte's member firms to communicate and share their stories and experiences through video. This area essentially functions like a YouTube for Deloitte professionals around the world. But you won't find political jokes, American Idol replays, and teenagers stretching their artistic muscles here.

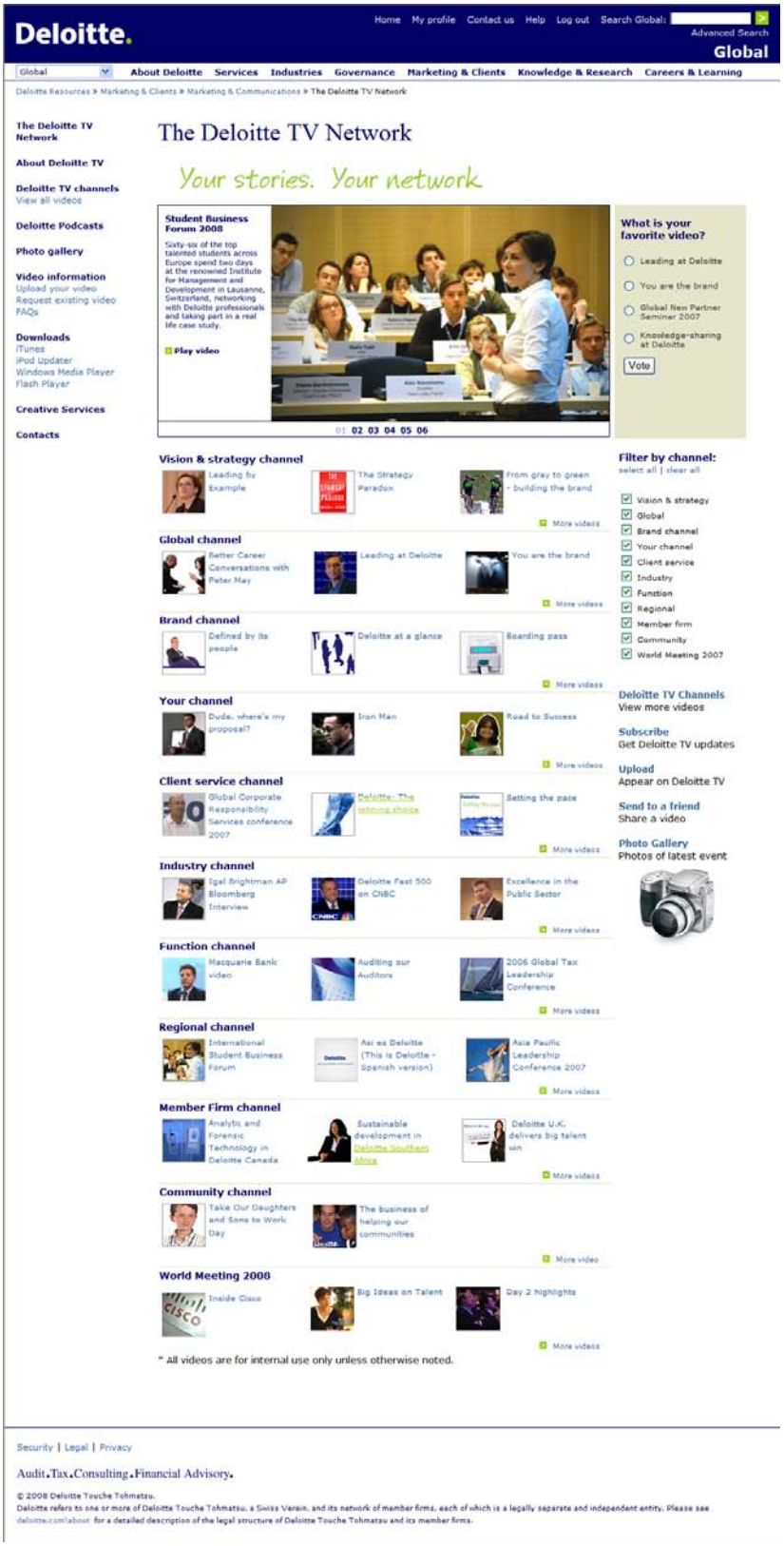
Nope, the *Deloitte TV Network* is all business. It leverages videos to relay all types of information from promoting new products and services, to announcing critical directives from senior management, to communicating what member firms are doing around the globe, and highlighting conferences and events.

The Deloitte TV Network site is an extremely interactive page that hosts a live poll for users' feedback, asking: *What is your favorite video?*

Users can filter by channel, such as *Vision and strategy channel*, *Global channel*, *Brand channel*, and *Your channel.* The latest three videos in each channel are displayed by default, and users can drill down to see more. Using these channels, users can quickly find videos of interest.

User can also download videos. Multiple formats are available to accommodate each Deloitte professionals' media preferences.

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: Users can browse business videos under the TV channels in the YouTube-like *Deloitte-TV Network* area.

In addition to news, video, and blogs, the DTT intranet supports a host of message boards, polls, and localized knowledge-sharing tools. All of these contribute to a very satisfying user experience that keeps Deloitte professionals interested and coming back for more. Most importantly, these elements help staff constantly enhance the experiences and services they give their member firm clients, and thus advance their overall business.

BACKGROUND

Global Intranet

To understand the background of the Deloitte Touche Tohmatsu (DTT) intranet, it's important to first understand the organization's structure. As mentioned above, Deloitte is not a corporation, but rather an organization of independent member firms. While 165,000 people work for Deloitte member firms, roughly 1,300 professionals work for Deloitte Touche Tohmatsu, a Swiss Verein (association), which is the global membership organization of Deloitte.

Deloitte Touche Tohmatsu, the global organization, has a global intranet that is part of the DR knowledge platform, which is intended to unite the global intranet and the 33 regional member firm sites.

DR consists of:

- DTT or global intranet, which can be accessed by all 165,000 people of Deloitte member firms
- 33 member firm or regional intranets, which are all linked to the global intranet

The member firm sites are operated independently. "But DTT's Communications team works very closely with them to share content and make sure we have a consistent look and feel, in compliance with the Deloitte brand," says Karen Frankola, director, DTT internal communications and creative services.

DR is an intranet that was primarily developed to host a Deloitte people directory and an office locator. It was also meant to be a repository for basic knowledge management information, targeted to DTT, the global organization.

From its beginnings, DR rapidly evolved to be used as an intranet platform by multiple countries, displaying content in multiple languages. It hosts the *Global Learning* platform, uses federated search to expose content from other Deloitte applications, hosts the global consulting knowledge management platform, and provides seamless authentication to dozens of applications and tools.

All intranet references and screenshots in this report refer only to the DTT intranet, unless otherwise noted.

INTRANET TEAM

"The number of people working on the DTT intranet is quite difficult to calculate," says Frankola, "because different sites are owned by different groups."

"So, for example," she says, "each of the functional groups, such as DTT Tax, has its own content manager. Conservatively, there are dozens of content managers and writers for the DTT intranet. In addition, roughly 100 people provide direct and indirect technological support through the Office of Information Management."

The global intranet staff of the DTT Communications team is made up of three full-time Deloitte professionals who are the core staff for DTT's intranet: an operations coordinator, an editorial manager, and an editorial specialist. The DTT

Communications team owns the homepage and sites for major DTT initiatives that impact all of the people who work for Deloitte member firms.

In March 2008, a content manager was hired. She spends approximately 50% of her time on the intranet. Frankola, who is director of internal communications, says that, "since we are such a small group, I am also involved in new site builds and design decisions, spending roughly one-third of my time on the intranet."

The team had no dedicated designer for the intranet until May 2008, when a designer was hired to devote half of her time to the intranet. Prior to her hire, the team occasionally borrowed DTT's Internet designer on a limited basis for special projects.

In addition to the people mentioned above, the DTT Communications team has four writers/communications specialists who regularly contribute stories to the intranet. Each spends no more than 10% of their time writing for the site.



Pictured: The DTT Communications intranet team. Front center: Rachel Flanagan; Back from left to right: Jessica Yi, Karen Frankola, Divyesh Jevtani, Jill Brower.

Governance

"Ownership of the global intranet is also complicated in the sense that no one group owns the entire platform," says Frankola. "Rather, different groups, such as DTT Tax or the Manufacturing practice, own their respective sites."

The DTT Communications team owns the global homepage and all major DTT initiative sites—such as *CEO corner* and *Deloitte TV Network*—and all major events.

In addition, DTT Communications works with all other DTT site owners to ensure consistency and often provides strategic advice on their site builds.

Because the organization has many stakeholders, the governance of the global intranet is collaborative. Three key stakeholders govern the DTT intranet: DTT Communications, Knowledge Management (KM), and Brand.

"KM is a key stakeholder due to the intranet's role as a knowledge-sharing vehicle," says Frankola. "And Brand is a key player because the independent member firms are encouraged to adhere to visual identity standards when building their intranets."

The DTT Communications team (akin to corporate communications in other companies) and KM are both in the Operations group. The head of Operations reports to the CEO. Brand is a separate division, and the Brand leader reports directly to the CEO.

"Brand has been given a lead role because Deloitte member firms are connected to each other through our brand," says Frankola. "For example, DTT cannot force Deloitte Ireland to make changes to its intranet because Ireland is a separate member firm. Instead, DTT could advise the Irish firm that their intranet design is inconsistent with brand guidelines. We are very respectful of member firm independence and try to lead them by providing examples of best practices."

The DTT Communications, Knowledge Management, and Brand teams work collaboratively with the other intranet stakeholders to drive major changes in the intranet, with support from the Office of Information Management (OIM).

Managing Brand

Member firms are provided design templates that adhere to Deloitte brand requirements, providing the same look and feel with customized content. The member firm sites also link to the global intranet, giving users the ability to move seamlessly back and forth between the sites. They can even access a drop-down menu and visit any member firm site in addition to their own.

"What this means in terms of governance is that DTT does *not* own the member firm intranet sites," says Frankola. "And therefore cannot control what content is posted or the design used. We are very respectful of the member firms' independence and instead try to lead and help them by providing examples of best practices—tools, layout, and so on—and stories they can post. DTT's goal is to lead by example and make it easy for member firms to follow the brand by providing wireframe templates and plug-in content."

"For example," she says, "to encourage member firms to put our CEO's blog on their homepages, we create an HTML-ready promotion box, so each member firm can promote the blog easily, in a consistent way."

Staffing Over Time

The DTT Communications intranet team began with only two people: an intranet manager and the director of eCommunications. In early 2005, a content manager was added to the team. With changes in roles and reorganization of the Communications team, by late 2006 the team consisted of:

- A director of internal communications
- An editorial manager
- An editorial specialist who writes for and manages the global homepage

- An eCommunications specialist who focuses on advising on other parts of the global site, working with member firms to promote global content and initiatives, building an online intranet community, and managing new, large site builds and rebuilds for DTT initiatives

This is the current model with three additions: a content manager, graphic designer, and a director of online strategy, who is leading efforts to take DR to the next level in collaboration with DTT and member firm stakeholders. All three are devoted to the intranet roughly half of their time.

GOALS AND CONSTRAINTS

Overall Goals

"The primary goal of the DTT intranet is to support Deloitte's vision to be the Standard of Excellence by facilitating interactions between and across member firms, service lines, and levels that reflect Deloitte's 'Always One Step Ahead' brand positioning," says Tracey Edwards, DTT shared services and chief knowledge officer.

"The intranet puts user needs first by connecting the 165,000 people of the Deloitte member firms in many ways," says Edwards.

The goals of the DTT intranet are to:

- Create a dialogue among Deloitte professionals around the globe, communicating organizational information, sharing best practices, and aligning professionals with the Deloitte brand and vision.
- Increase productivity by providing a rich array of tools, such as robust search, people profiles and people directory, and rich content creation and delivery.
- Provide a common platform for knowledge management communities.
- Create an interactive user experience through the use of wikis, blogs, content rating, and discussion boards, and integration of recruiting tools and systems.
- Create a customized user experience driven by profiles and preferences.
- Create mobile content delivery, with more interactive capabilities for end users.

In addition to the intranet's overall goals, the DTT Communications team has specific goals for the homepage and the major DTT sites it owns.

Putting Users First: Telling Good Stories

"As its name implies, the primary goal of Deloitte Resources—DR—is to serve as a resource of news, information, best practices, and tools for all Deloitte member firm professionals worldwide," says Frankola. "Since Deloitte member firms are all independent entities, Deloitte Resources is the primary vehicle for connecting them and developing the brand they share."

"Our overall goal for the intranet is to create a site that puts users first—not just in terms of design, but in content," says Frankola. "Particularly on the global homepage, we are committed to telling stories that people want to hear. We view ourselves as in-house journalists, using techniques like humanization (building stories around a central person) rather than just providing facts or quotes from senior leaders."

But her team doesn't control all of the intranet content. There are many stakeholders, she says, so her team tries to lead by example.

Her overall goal for these pages is to have the people of Deloitte feel that they are getting relevant information that will help them, "by doing their jobs more effectively, connecting to their colleagues, or inspiring them to give back to their community," she says.

To accomplish this objective, her team has developed a writing standard where it writes in a third-person, objective style with a premium placed on showing versus telling. "In other words," she says, "we don't tell our readers that Deloitte is innovative or cares about its people; rather, we show real-life examples that we hope will make that case. We use rich content such as video, photos, and catchy headlines to capture their interest. We believe our people are sophisticated professionals that appreciate quality content and can think for themselves. So we try to avoid self-serving articles and corporate-speak.

"We are committed to communications that are truthful, straightforward, and jargon-free, written in a third-person, journalistic style," says Frankola. "We also work to align our stories to strategy and focus on key messages, delivered in a consistent way, such as the importance of talent."

"We want our users to view the homepage in much the same way as a news website such as CNN," says Frankola. "They should be able to easily access compelling, engaging information that is relevant to them."

Frankola also says that they try to tell stories online in a holistic way instead of just writing a shorter version of a print story. "For example," she says, "a photo and its caption can tell an important element of a story better than writing additional paragraphs. A short video can express opinion and emotion in a stronger way than even quotes."

The global intranet site is the primary internal communications channel for the DTT Communications team. "We are working to evolve to a pull-type of communications strategy in which information is posted on DR, where employees can easily access it," says Frankola. "Even when push communications—such as e-mails—are used, content is almost always posted on DR for later access. For example, we send electronic newsletters with short blurbs linking to full coverage on DR.

"Even though we have some technology constraints, we have no limits when it comes to telling good stories," she says. "We always ask ourselves: 'What would our audience want to hear?'" To keep abreast of their audience and site usage, the DTT intranet team studies site metrics closely and often conducts informal focus groups.

Going Green

Frankola says the Deloitte network of member firms is evolving toward a greener way of communicating, and the intranet is a vehicle for that change. "We are not printing material to the degree we did previously," she says. "For example, when a major report on talent was released several months ago, we did not print it." Instead, they posted it on DR and promoted it though a vanity URL.

Facilitating Collaboration

"We want the intranet to be as collaborative as possible," says Frankola. "We ask our readers to contribute story ideas, photos, and comments." The site uses polls and contests to engage professionals around the world. She says the site is helping the organization transition from a one-way, top-down, well-scripted type of communication into a two-way, freely-scripted, engage-in-dialogue type of organization. "DTT's current CEO, who took office just over a year ago, is excited

about more collaborative types of online communications and is writing an internal blog," she says.

The Challenges of Local Autonomy

Because the Deloitte organization is structured as a network of independent and autonomous member firms, the DR global site has a unique challenge in reaching its users. The DTT or global homepage is not the default start-up page for any of the 165,000 Deloitte member firm professionals, and there is no forced behavior that sends people to the global site. Roughly half of the member firms are on the DR platform, but their staff members might not even be aware a global DR exists. Instead, they get a customized local homepage, which typically has numerous links to global DR. "When a user clicks on a DTT story, he seamlessly lands on global DR, but may believe he is still on his country's intranet," says Frankola.

"Many member firms—including the US member firms, which make up one-third of total employees—do not use the Deloitte Resources platform for their global intranet," she says. "Their users can access global DR, but they must sign on with a password. Many employees in these member firms are not even familiar with the term 'Deloitte Resources,' although they visit it every time they read DTT content."

Even the employees who work for DTT (the "global office") rather than a member firm don't have the global homepage as their default start-up homepage, she says.

"For example, many DTT employees work in the United States, so their start up homepage is the Deloitte US intranet, rather than the DTT Deloitte Resources homepage. These Deloitte professionals can choose to make global DR their homepage, but they still must access the US intranet for some services. In other words, DTT staffs have two competing intranets: global Deloitte Resources and the intranet of the member firm where they are located. This makes it difficult to use the DTT intranet as a destination where all employees can be expected to pull critical information."

English as the Official Language

Another major constraint is language. While English is the official language of Deloitte worldwide, not every member firm professional is fluent. Global DR uses only English (except for occasionally sharing best practice examples in other languages), which means many users may not find the content easy to understand. Some member firms translate global stories in their native language before posting on their homepages, but more typically, says Frankola, they simply post a link to global DR.

TIMELINE

Initially, the focus of the DR OIM team was on technical enhancements and increased functionality. "Once the technology was stable, the DTT Communications team played a significant role in evolving and promoting the business use and value of the intranet platform," says Kimberly Troske, OIM deployment manager and a member of the DR team since its launch. She provides the following information related to the progress of DR.

Inception

- **September 2002:** The DR program was initiated, beginning with defining high-level requirements, governance, and scope.

- **October 2002:** Immediately following inception, the DR program team started conducting interviews with DTT functional areas. Requirements documentation and development began shortly thereafter.

Initial Training and Launch

- **March 2003:** The first content management training was held in New York. It was targeted for content managers for global functions who would have sites for the initial launch.
- **April 7, 2003:** Launch date.

Key Enhancements

A number of updates were made to DR from 2003 through 2006—sometimes up to five releases in a 12-month period.

- **August 2003:** Introduced "Unified content management" which allowed for sharing content, as appropriate, between the intranet and the client extranet.
- **October 2003:** Implemented page-level security for limited accessibility on the front-end.
- **December 2003:** Re-branded the entire front-end.
- **May 2004:** Redesigned the maintenance of primary landing pages and introduced "marketing-friendly" URLs.
- **August 2005:** Provided multi-language search capabilities
- **January–April 2006:** The four releases over this period enhanced end-user form functionality and form reporting capabilities, implemented ability to track downloads, and launched a new search interface including search tips.
- **September 2006:** Implemented ability to track search terms within Web analytics tool.
- **2007 and forward:** The DR team changed focus in 2007 and the development teams switched their focus to designing and developing ECM/portal capabilities. During this time, no major technology updates were made, but country participation continued to grow, as shown below.

Total number of locations/sites (independent Deloitte member firms) on the DR platform:

End of 2003: 2
End of 2004: 10
End of 2005: 16
End of 2006: 20
End of 2007: 30
End of 2008: 33

There is no mandate that member firms have to join the DR platform. "Because of the way our organization is set up, each member firm has the option to choose its intranet platform," says Troske. "However, since Deloitte Resources became available, many have chosen to join for knowledge sharing, content promotion, and accessibility by others outside their member firm."



Pictured: The links available off the global DR homepage. Here, users can see the site's IA and find contacts for each site. The country/regional list is the 32 sites that are on DR (for a total of 33, including the Global DR site).

USERS

The users for the global intranet are all 165,000 Deloitte professionals. They work in more than 140 different countries. Most of them speak English, but it is a second language for many.

Types of users include:

- 8,000 member firm partners that have ownership in their firms (nearly all work directly with clients)
- Managers, senior managers, and directors who supervise staff
- Client practitioners who work with clients, going from assignment to assignment
- Specialists and administrative professionals who provide support for fellow professionals

More than 100,000 Deloitte professionals work directly with clients and are typically located at client sites, rather than in the office. Most Deloitte professionals are issued laptops because they travel frequently; the organization has a culture that also permits most professionals to work from home at least occasionally.

USER TASKS

Some of the most common tools for Deloitte member firm professionals—reporting time and expenses—are not found on Global DR, but are located on their member firm site. "However," says Jill Brower, DR editorial specialist, "there are important global tools on DR, and we hope users searching for their tools see an arresting headline or photo that causes them to read a story."

On the top of the homepage are the most timely and relevant news items. Users can also access:

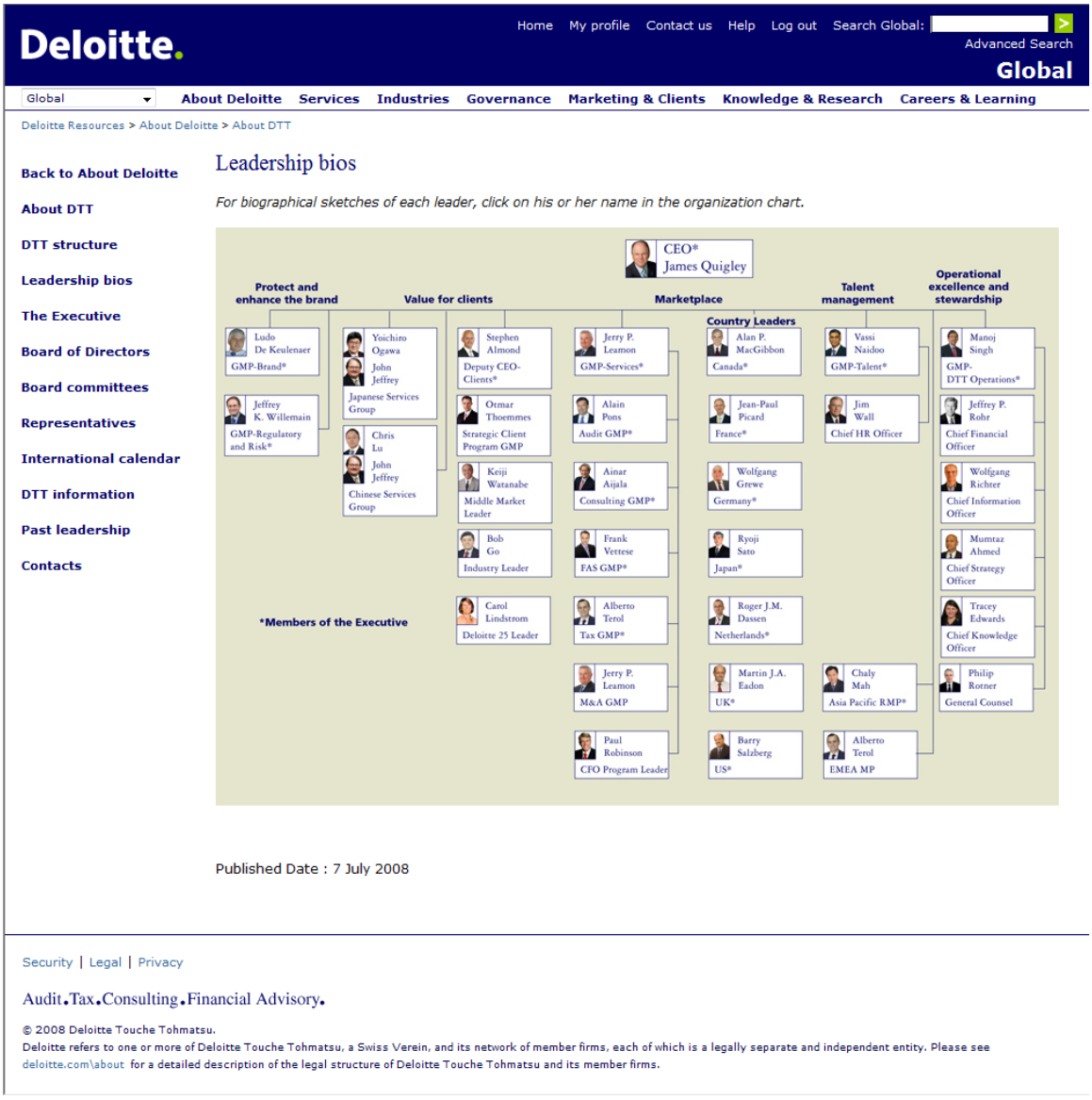
- resources, such as press releases and press clips that mention Deloitte and other Big Four firms;
- the *Global People Directory* (an online directory of all people in the member firms);
- Webmail, to check e-mail from anywhere in the world;
- collaborative eRooms, where users can post and share information with team members; and
- e-learning courses and other business-specific tools.

Top 10 Most-Visited Pages

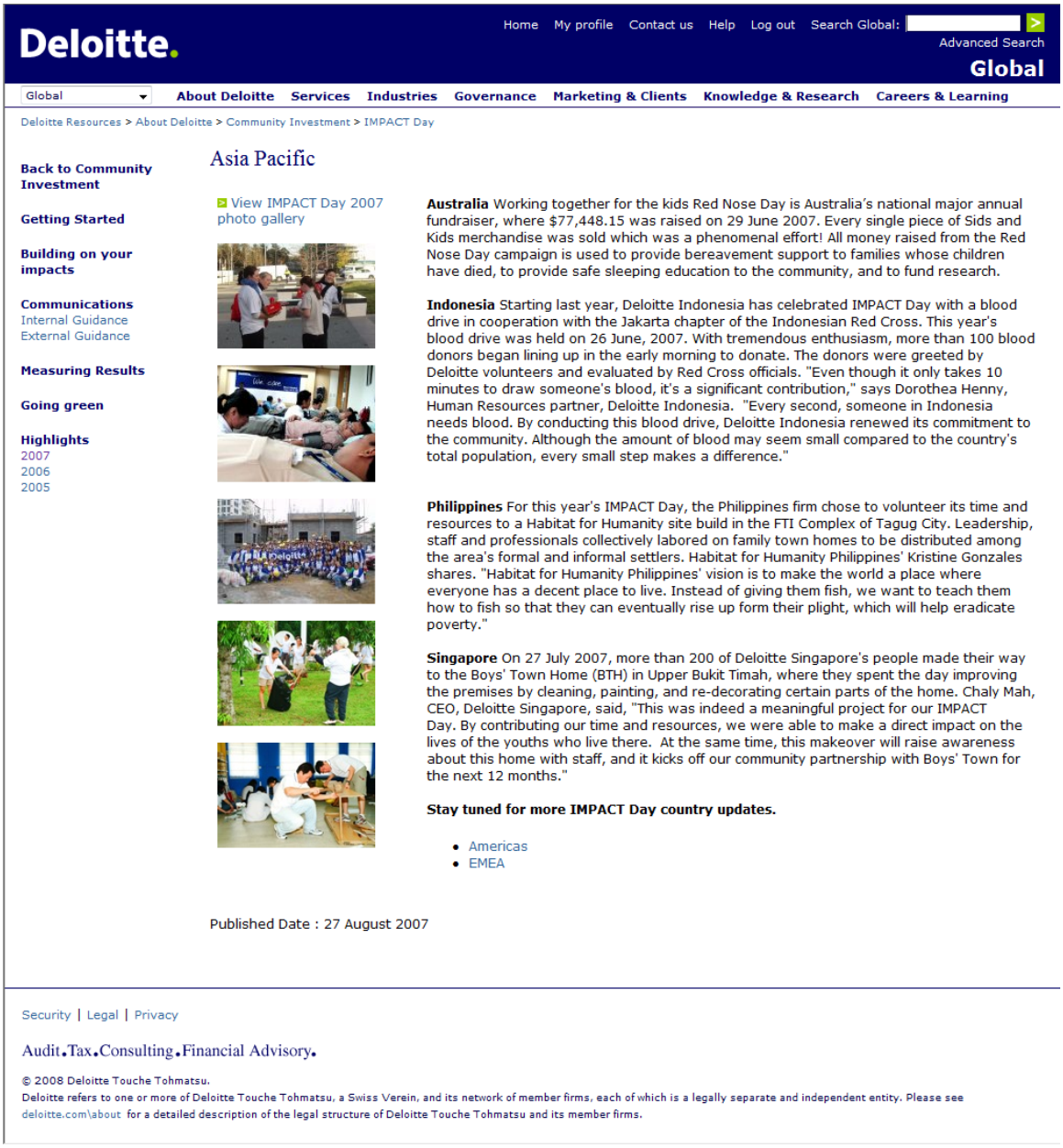
The following is a list of the top 10 most-visited pages on Global DR over the past year:

1. The global homepage
2. The *Global Learning* homepage
3. Internet-based e-mail landing page
4. Deloitte Entity Search and Compliance (DESC) Restricted Entity List
5. *Audit Learning* homepage
6. *Deloitte Risk Management System* (DRMS) homepage
7. *CEO corner*
8. *International Tax Research Resources* homepage
9. *Careers & Learning* homepage
10. *International Tax* homepage

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: This content page is packed with useful information for Deloitte professionals looking for material on the organization's leadership. It features an easy-to-use, interactive organization chart, where users can find biographical sketches of each leader, along with their photos.



Pictured: A content page containing information on Deloitte's IMPACT Day, on which tens of thousands of Deloitte professionals give back to their communities. It includes a brief overview of the annual event and a photo gallery of IMPACT Day participants from all over the world (in this case, from the Asia Pacific region).

DESIGN PROCESS AND USABILITY ACTIVITIES

Homepage Redesign

A year ago, the DTT Communications team redesigned the homepage.

In June 2007, a new CEO and senior leadership took office, and the decision was made to discontinue several internal communications channels, thereby making the global intranet the primary vehicle for internal communications. "With this in mind,

the Global DR homepage was redesigned like a newspaper, with major news items and stories 'above the fold,' and other items of note below it—like subsections of a newspaper," says Rachel Flanagan, DR editorial manager.

The redesign also added a *Now featured* section, which functions like a theme package, typically pulling in several elements—such as a video, an article, and a tool—around one theme.

"Previous to this shift, the homepage served as something of a catchall for links, but no feature stories," says Flanagan. "Our goal with the redesign was to have every link on the top half of our page link to a news story, where we could give our readers the most important information in an interesting and readable way." Each story then links to relevant pages for more information.

Making Changes

The Communications team has been fine-tuning the homepage over time by analyzing Web metrics to find out which types of stories get the most readers. "On the global homepage, we are continually re-evaluating which stories to run," says Divyesh Jevtani, DR operations coordinator.

"We find that the most popular stories either tell a person's story, or tell a business or client story through one person's point-of-view," he says, "The common thread was people. So we now focus on tying in the people of Deloitte to any story topic."

Another way they increase the readership is by working with the other member firms to have them link to the global site from their local firm sites. "In getting feedback from the member firm editors, we learned that Deloitte Resources not only provides these users with a variety of resources that allow them to provide efficient and effective client service, but the design of the site also encourages user participation through polls, calls for story and video submissions, and a variety of blogs, including one from the DTT CEO," says Jevtani.

So, they provide a variety of options for users to access the information they are most interested in, whether it be a blog, a story, or a database, as quickly and easily as possible.

"Feedback from users and other content managers helps us to continue to evolve our content, tailored to the user," says Jevtani. "We hold a monthly meeting with DTT and member firm intranet communicators to share best practices and get feedback on what users are responding to."

Measuring Success

Since changing the homepage strategy, the team has seen significant increases in usage for the homepage overall as well as for individual stories. For example, between June 2007 and June 2008, the monthly homepage visits increased by 136%, and the average number of visits to feature stories increased by approximately 150%. "For the *World Meeting* site, we saw a 200% increase in visits to the 2008 homepage versus the 2007 page," says Brower.

In 2007, the team surveyed Deloitte professionals worldwide to understand how, when, and where they preferred to receive their communications. Partners ranked strategy, brand, competitors, and clients among their top choices of subjects to read about. Staff members ranked strategy, brand, talent, and global performance as their top choices. "We put this information into practice on Deloitte Resources by striving for a balance of each of these subjects in our stories and promotions," says Brower.

While most partners still prefer to receive communications from senior leadership through e-mail, most staff members said they preferred to access it online, she says. Both groups were also were interested in viewing videos and listening to podcasts. "With the *Deloitte TV Network* and special events videos, we are trying to bring these elements to the people of Deloitte," says Brower. "Since our Deloitte.com counterparts create a variety of podcasts, we also link to these from the global homepage."

URL AND ACCESS

The global intranet is accessed at www.deloitteresources.com. Users can access the site from any computer, anywhere by simply entering their username and password.

The DTT DR homepage is not the start-up page for Deloitte professionals; instead, local member firm intranets are set as new hires' start pages.

TECHNOLOGY

DR is a custom application built on Vignette Dynamic Link Library. Because this version offers only limited customization, the team is moving the intranet to the latest version of Vignette this year.

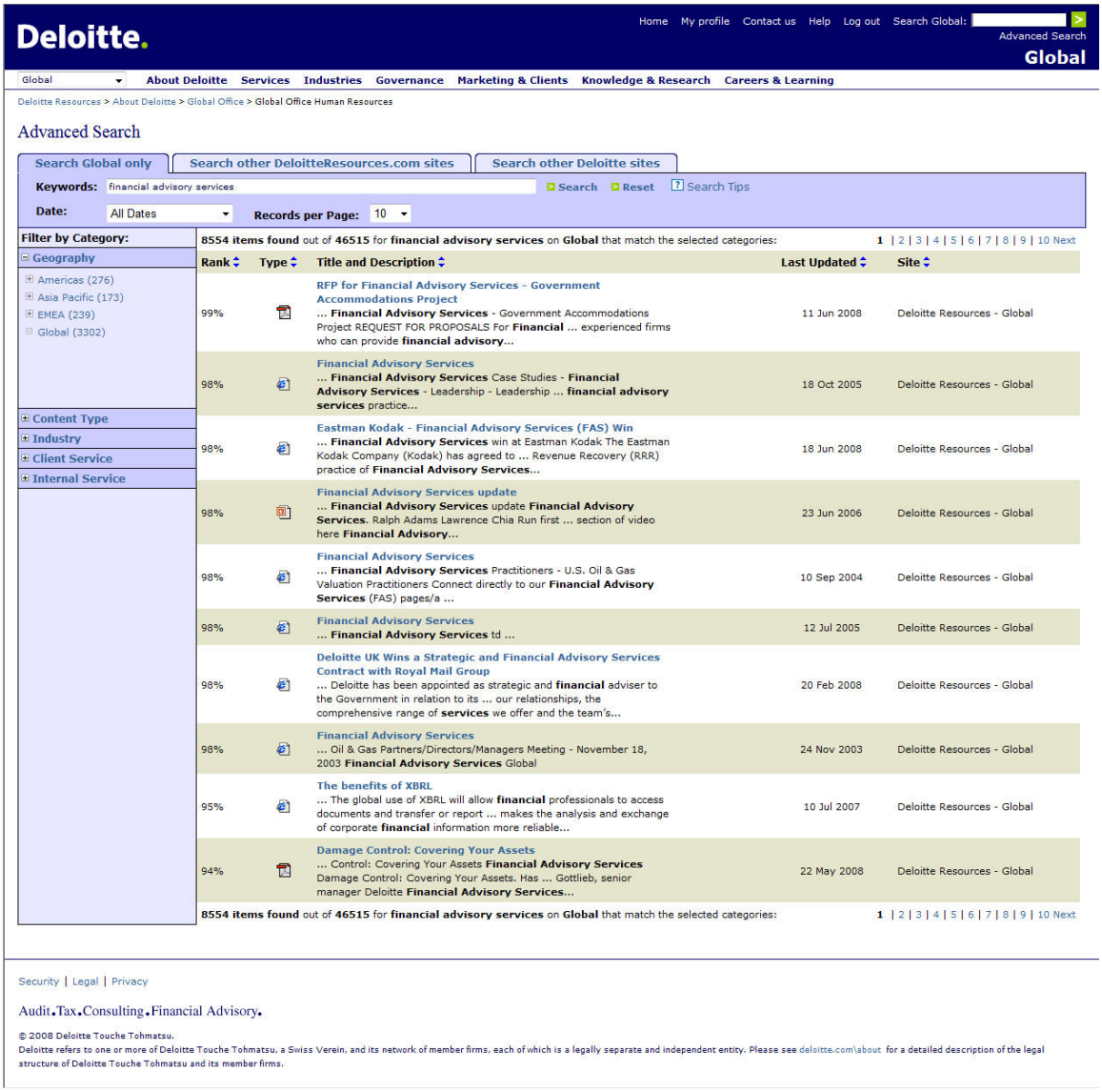
As its content editor, the team uses the eWebEditPro application (version 5.1.0.43), supported by Ektron. For Web metrics, DTT uses Omniture Site Catalyst, Version 13.5.

The underlying technology has remained the same through the years but the team has made updates to style sheets in order to maintain and promote global brand compliance.

SEARCH

Autonomy's K2 search platform is used for both the intranet and the Deloitte.com public site. The team is in the process of migrating to Autonomy's IDOL search platform and is expect to release it by the time this report is published.

"We've been customers of the K2 platform for more than eight years," says Jevtani. "It provided robust customization to meet our search needs across numerous applications. Autonomy acquired Verity a couple of years ago and released the IDOL platform as the next generation enterprise search so it's a natural progression for us."



Pictured: A listing of the firm's financial advisory services search results from the intranet's advanced search option. The search results include information on financial advisory services, member firm clients, and even relevant news.

CONTENT MANAGEMENT

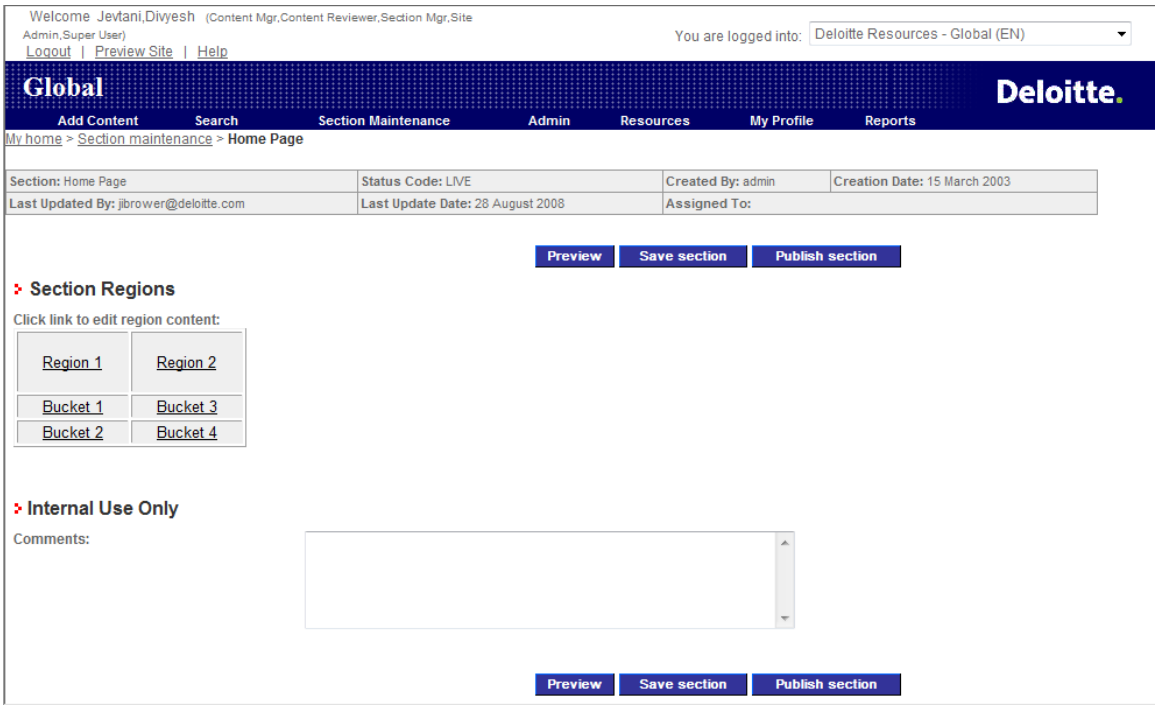
The site's CMS was initially built with the Vignette CMS product. "Over time, however, we customized the capabilities to such an extent that the code base ultimately became wholly custom-developed," says Troske.

The CMS provides templates for content managers to create site homepages, secondary landing pages, and content pages. There are 12 custom content templates as well as a homepage and landing page template. These templates provide content managers the ability to create content that is globally branded but locally focused.

"Content managers follow brand guidelines when creating pages, contributing to a highly consistent appearance from country to country, and page to page." says Brian Resnick, Senior Manager, DTT Brand Development. "That look and feel—clean and

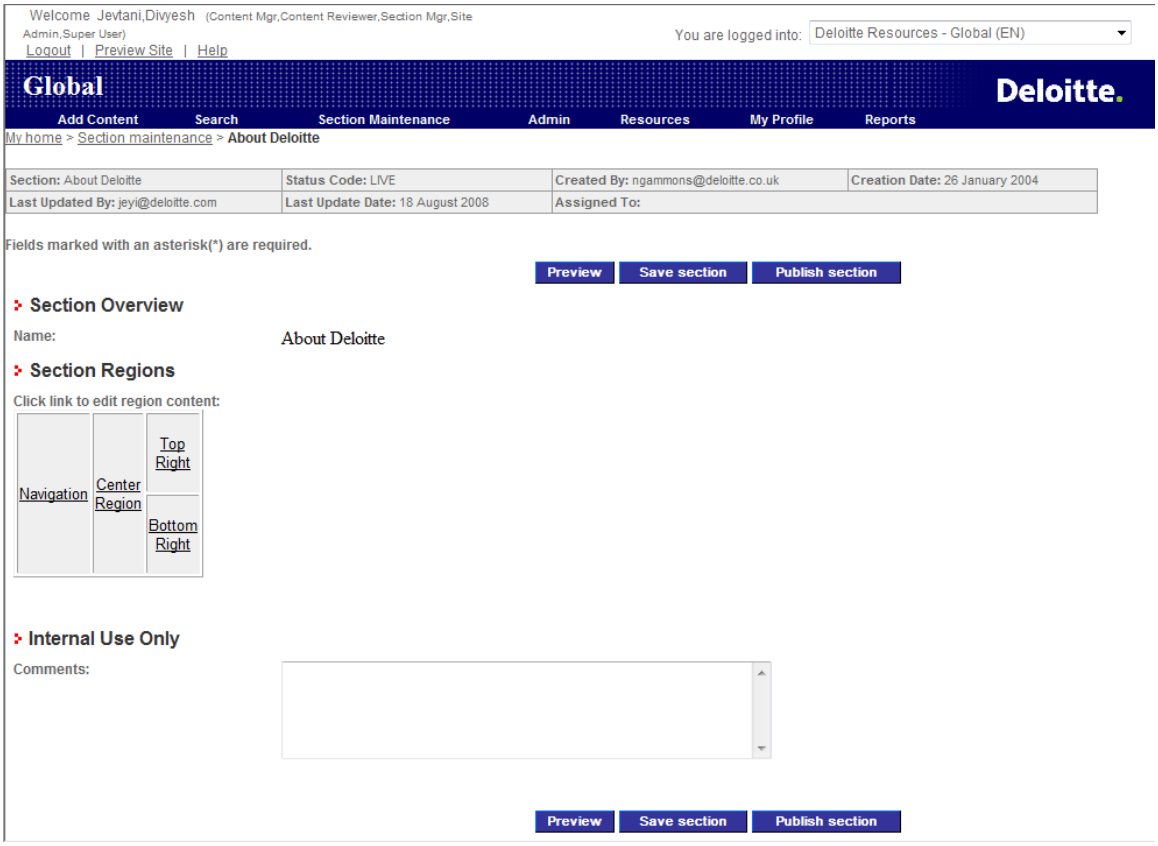
elegant in its simplicity, with carefully considered focal points of insight and inspiration—is completely informed by the notion of 'focus,' the brand essence of Deloitte."

The CMS provides search capabilities, content cloning, expiration and resurrection of content, application of global taxonomy/classification to content, the ability to restrict access to content pages to a defined list of users, and custom JavaScript and media capabilities.



Pictured: The content manager has a wireframe that provides guidance to content editors.

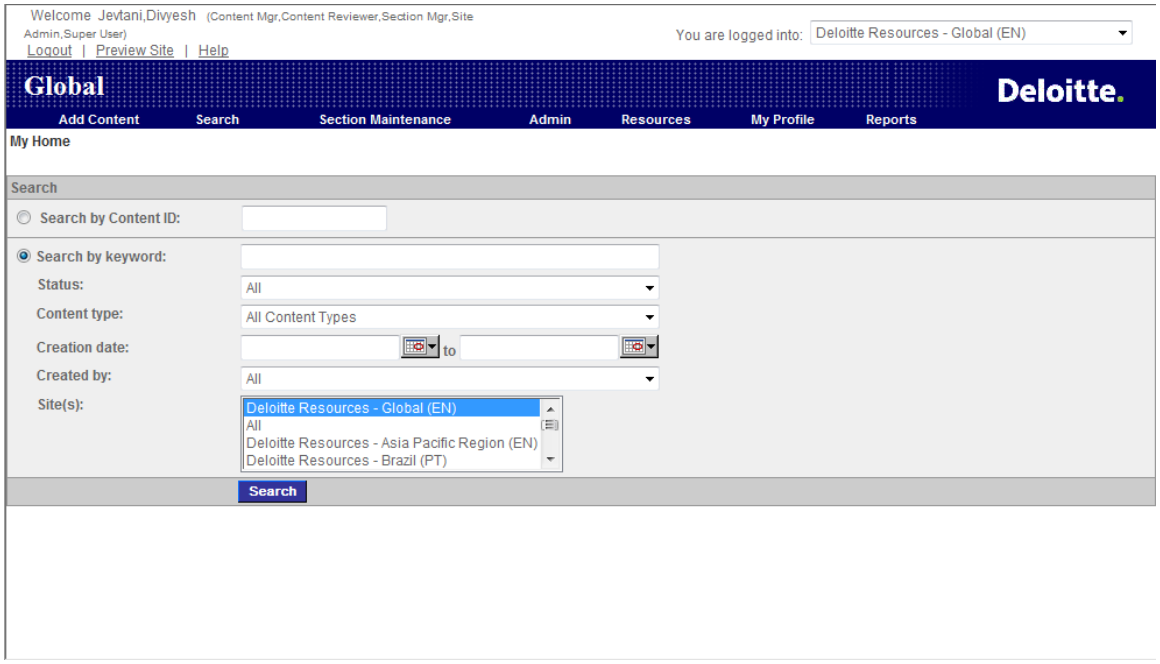
10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: This view of the content manager wireframe shows content editors where specific content blocks will appear on the page.

Each country, region, or location that wants to launch a site on DR has the responsibility of appointing content managers and owning and being accountable for any content posted on that site. Although the global team provides training, guidelines, and suggested practices, ultimately, every group owns their content. Likewise, within the global site, where there is not such a clear umbrella of ownership, global functions and groups take ownership for the content they post on DR, but the Global Communications group is responsible for owning and maintaining the global homepage.

“Because of the structure of our organization, it is hard to enforce templates for independent member firms,” says Jevtani. “So the DTT Communications team has created relationships with our colleagues around the world that manage different sites to share best practices and templates.”



Pictured: The homepage when a content manager logs in.

FEATURES

We've described this site's many useful and interesting features throughout this section. Following are brief descriptions of other notable features and screens showing them in action.

***Global Learning* homepage.** "The *Global Learning* homepage is consistently one of our most-visited sites on Deloitte Resources," says Brower. Because so many Deloitte professionals use this site to complete both required and non-required e-learning courses, its readership increases monthly. In just one year, between June 2007 and June 2008, the number of site visits increased by 64%.

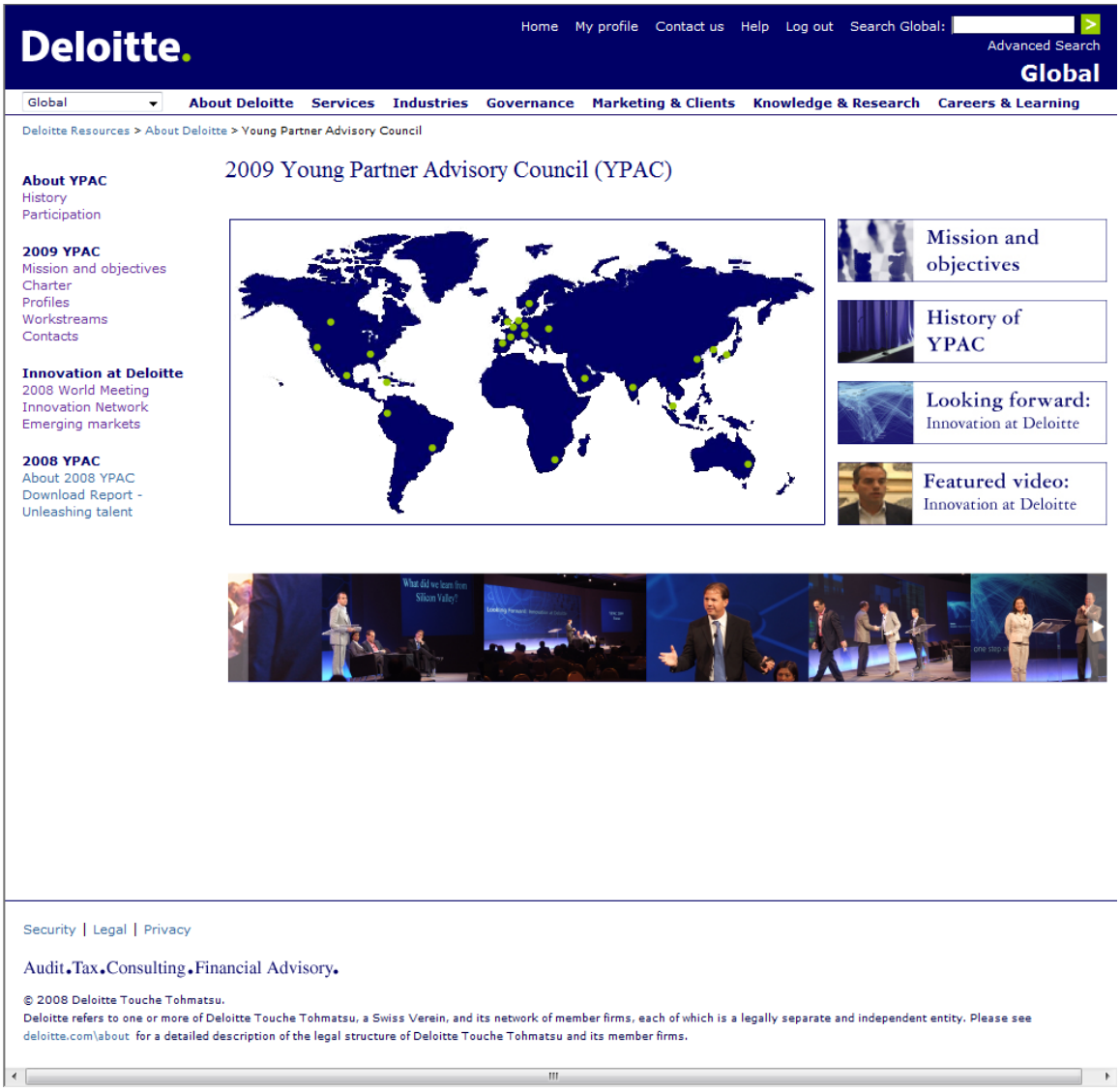
10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: Deloitte's *Global Learning* homepage serves as a one-stop-shop for all Deloitte professionals accessing e-learning courses. The site links to a variety of e-learning information and programs, including enrollments, certifications, a library of books, and a variety of other options for enhancing professional skills. The site also includes a Flash navigation in the center of the page that lets users quickly view and access the most popular learning tools.

***Young Partner Advisory Council* (YPAC) homepage.** Launched in August 2008, YPAC is a group of young leaders tasked with researching and presenting on one particular topic of importance to the global organization. "This year's group is focusing on innovation, and we aimed to make their site as innovative as possible to reflect this," says Brower. The main image on the YPAC homepage is a world map, with green points indicating each YPAC member's home country. When users click a green point, they're taken to that person's biography.

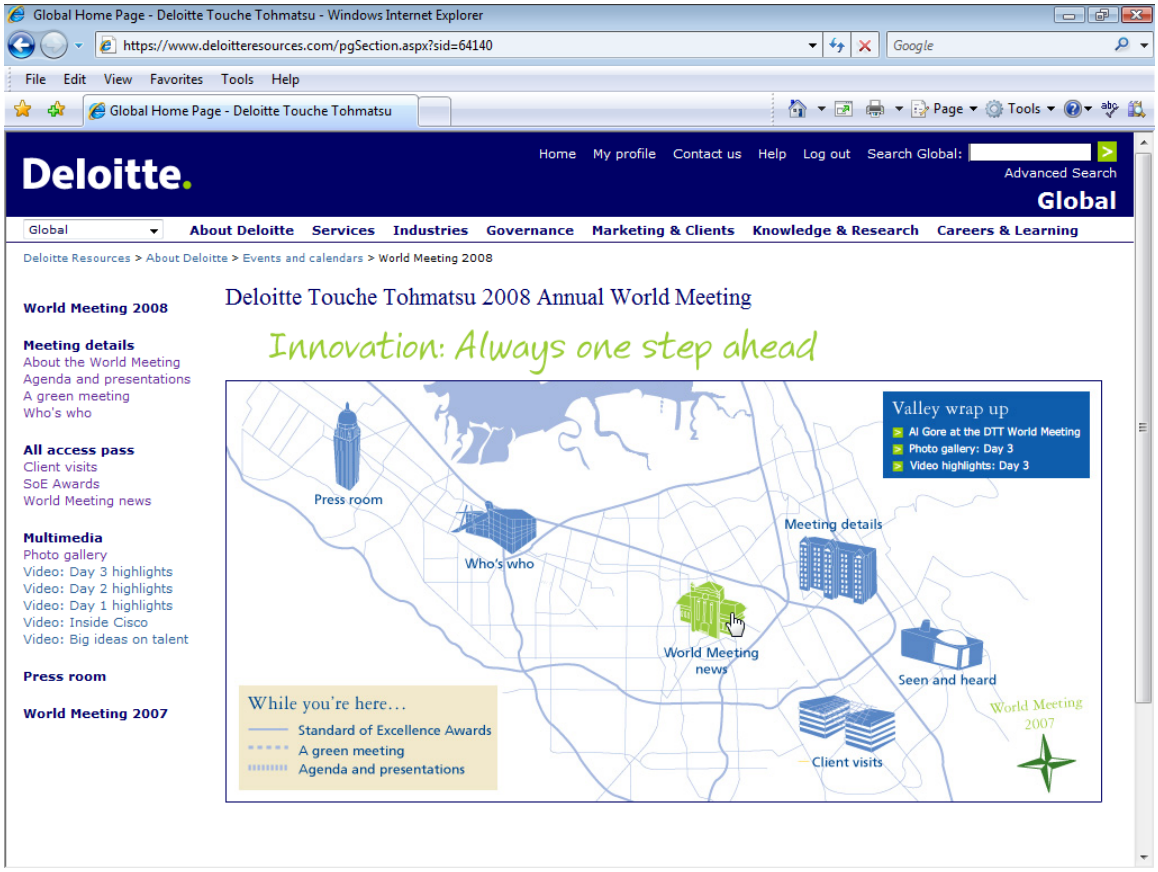
10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: The YPAC homepage. The Flash map of YPAC member locations lets users click on the green dots to access profile pages for each YPAC member. Users can also scroll over the images below the map to see informative captions.

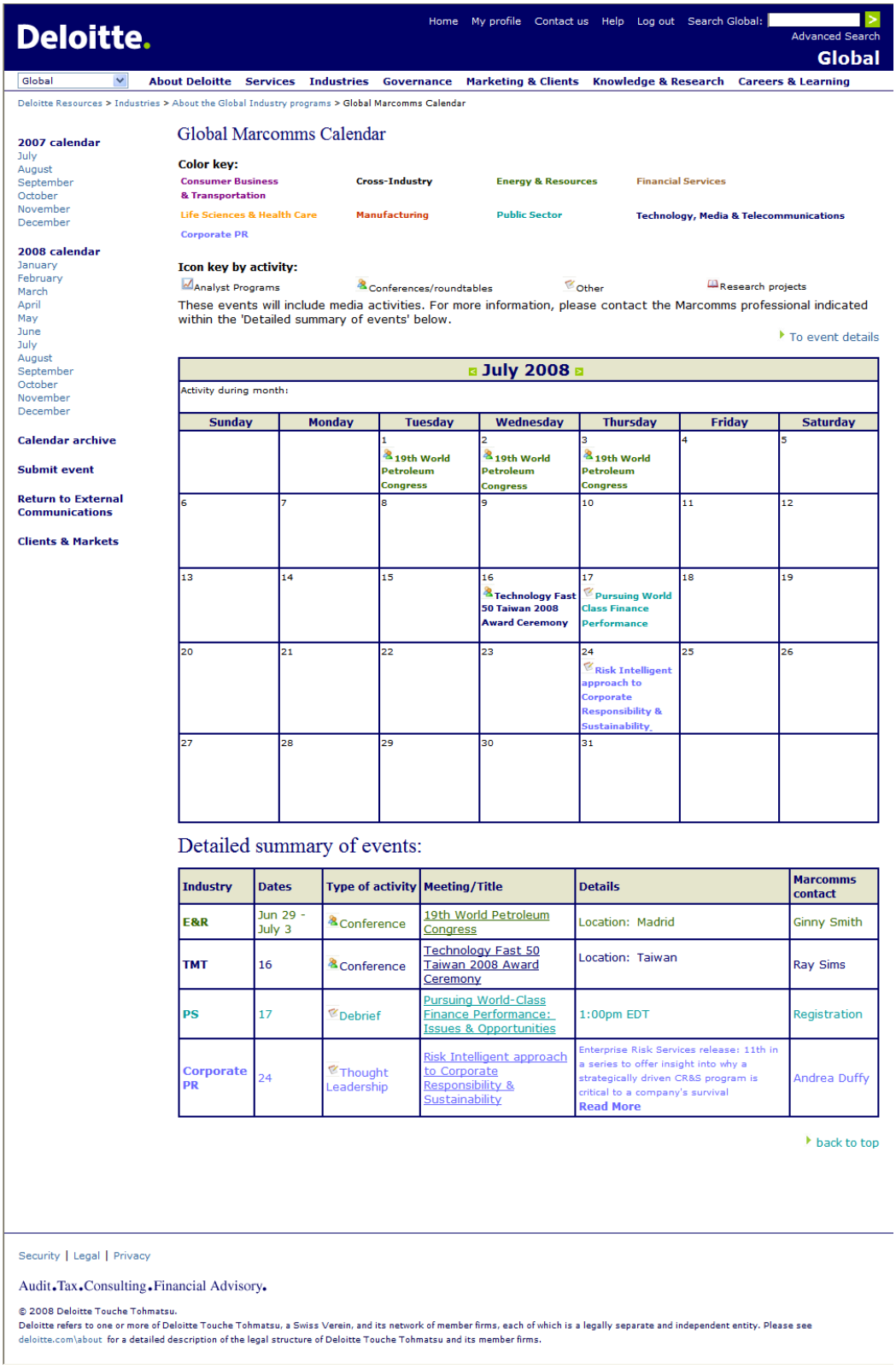
***Annual World Meeting* page.** Deloitte's Annual World Meeting brings together the heads of all Deloitte member firms. In 2008, it was held in Silicon Valley. As the screen below shows, the theme was "innovation" and the concept is reflected in the *Annual World Meeting* page's features.

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: DR hosts sites for all major Deloitte sponsored events such as the annual World Meeting, which brings together the heads of all Deloitte member firms. This year, the meeting was held in Silicon Valley with a theme of "innovation," so the designers created a site page using innovative navigation and elements. In addition to left-hand navigation, people could use the Silicon Valley map on the meeting's homepage as an interactive tool to locate the information they needed. The site also hosted videos, daily photo galleries, a form for anyone to submit questions to speakers, agendas, speaker presentations, and all news surrounding the event.

Interactive calendars. DR hosts a number of interactive calendars tailored to specific groups and functions.



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Global

Global | About Deloitte | Services | Industries | Governance | Marketing & Clients | Knowledge & Research | Careers & Learning

Deloitte Resources > Industries > About the Global Industry programs > Global Marcomms Calendar

2007 calendar
July
August
September
October
November
December

2008 calendar
January
February
March
April
May
June
July
August
September
October
November
December

Calendar archive

Submit event

Return to External Communications

Clients & Markets

Global Marcomms Calendar

Color key:

Consumer Business & Transportation | Cross-Industry | Energy & Resources | Financial Services
Life Sciences & Health Care | Manufacturing | Public Sector | Technology, Media & Telecommunications
Corporate PR

Icon key by activity:

Analyst Programs | Conferences/roundtables | Other | Research projects

These events will include media activities. For more information, please contact the Marcomms professional indicated within the 'Detailed summary of events' below.

To event details

July 2008

Activity during month:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1 19th World Petroleum Congress	2 19th World Petroleum Congress	3 19th World Petroleum Congress	4	5
6	7	8	9	10	11	12
13	14	15	16 Technology Fast 50 Taiwan 2008 Award Ceremony	17 Pursuing World Class Finance Performance	18	19
20	21	22	23	24 Risk Intelligent approach to Corporate Responsibility & Sustainability	25	26
27	28	29	30	31		

Detailed summary of events:

Industry	Dates	Type of activity	Meeting/Title	Details	Marcomms contact
E&R	Jun 29 - July 3	Conference	19th World Petroleum Congress	Location: Madrid	Ginny Smith
TMT	16	Conference	Technology Fast 50 Taiwan 2008 Award Ceremony	Location: Taiwan	Ray Sims
PS	17	Debrief	Pursuing World-Class Finance Performance: Issues & Opportunities	1:00pm EDT	Registration
Corporate PR	24	Thought Leadership	Risk Intelligent approach to Corporate Responsibility & Sustainability	Enterprise Risk Services release: 11th in a series to offer insight into why a strategically driven CR&S program is critical to a company's survival Read More	Andrea Duffy

back to top

Security | Legal | Privacy

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Pictured: The global Marketing and Communications calendar is updated monthly and features all critical dates for marketing and communications professionals, color-coded for industry-specific dates and events.

Collaboration Tools

The DTT site doesn't offer formal collaboration tools; instead, users collaborate through the use of blogs, message boards, and polls.

- **Blogs.** The global CEO blog (*Jim's blog*) lets users post and respond to comments to the blog by sending an e-mail to the content editor. The content editor also manages blog subscriptions and sends out an alert when a new blog is posted.

  Another blog, *Bob's blog*, was created by the Global Ethics group to discuss ethical issues through the voice of "Bob," a fictional client service professional. While Bob is not an actual employee, the issues raised in his blog are true to life and elicit many comments from readers. Like *Jim's blog*, *Bob's blog* has a mailbox where readers send comments that are monitored and manually posted to the content page.
- **Message boards.** The Global Clients group created a message board that lets users send e-mails to the content editor to either respond to a thread or create a new topic.
- **Polls.** DTT uses a third-party vendor to host polls on various pages. When users submit a response, they immediately see, in percentage points, other response rankings. "This is a great way for users to feel like they are contributing to the intranet," says Jevtani.
- ***Global Knowledge Management Community Space*.** The *Global Knowledge Management Community Space* provides a clearinghouse of information about knowledge management trends, topics, and best practices. In addition, this homepage can be used to locate other Deloitte knowledge management professionals around the globe—by region or by area of specialty—through a member list and profiles. The homepage includes links to past meetings, with related presentations and recordings, as well as the schedule for future meetings and agendas. The page's *Learning Corner* provides information on upcoming knowledge-management-related conferences and learning opportunities across the globe, with a link to the selected *KM Book of the Month* in digital format.
- **Other communities.** Among the other content and knowledge management communities that are connected through DR sites are the Information and Research Professionals, the Taxonomy Community of Interest, and the Content Managers' Network.

Knowledge Management

The *Knowledge & Research* section in the top navigation bar offers access to key global information and research and knowledge management tools and resources. This section is available to all Deloitte partners and staff, regardless of country or service line designation.

Access to service line or industry knowledge assets is provided via specific portals linked to knowledge repositories managed by dedicated knowledge management teams. In addition, country intranet sites also host country-focused knowledge content in the native language.

Content manager reference materials are available to support all content and knowledge management processes, which are summarized in the *Content Lifecycle Management* guidelines. These guidelines ensure consistency across the various

knowledge management and content management teams, as well as proper confidentiality and risk-mitigation processes.

Data Visualization

Many of the organization's data statistics are confidential and shared only with a select group of people within Deloitte. "Our platform does allow for security groups, so only people with access to certain sites can view the information," says Jevtani. "Every year when member firm revenue results are announced, they are illustrated on a map of the world where users can view population and revenue numbers broken down by region, and in aggregate." This tool is shown below:



Pictured: Data visualization of a specific region's revenue and headcount.

The designers also used dynamic Flash visuals to create interaction for users. Examples include the *World Meeting* page, described above, and the *Global Learning* homepage, which features selected courses in the center of the page. Users can move the slider to scroll through the courses, in a manner similar to iTunes.

LESSONS LEARNED

Following are some lessons learned from key DTT team members.

Tracey Edwards, DTT shared services and chief knowledge officer:

- **Productivity is critical.** "Most Deloitte professionals spend the bulk of their time at client work sites, so they need to utilize the DTT intranet as efficiently as possible. They have to be able to connect to their colleagues around the world quickly and easily, as well as access tools and resources that improve their productivity and add value for their clients. "As a knowledge management platform, the intranet provides a one-stop experience for practitioners to get the information they need to provide excellent client service. Deloitte's Knowledge Exchange is essential to the consulting function's ability to delivery quality client service," she says. "You can put all the bells and whistles you want on an intranet, but it's critical that these resources are easy to use, and help professionals do their jobs more efficiently."

Jan Schaefer, director, DTT Communications:

- **Keep raising the bar and measure the results.** "Our overall communications strategy is to continually improve the quality of what we deliver. So we challenge ourselves to improve the design and content of the intranet. The DTT Communications team does that directly with the sites we own, and we seek to align other communicators by providing guidance and sharing best practices. For example, this year the DTT Communications team delivered a series of regional workshops to member firm content managers, offering practical advice on how to create a compelling intranet. Feedback from participants was very positive. We measure success primary through unique visits, constantly modifying content and design based on user popularity. We also conduct user surveys. For example, a survey of Deloitte member firm staff showed that most preferred to access DTT information online, rather than receiving e-mails. As we prepare to move to a new platform that will allow increased personalization, we hope to evolve into a truly pull communications strategy centered on DR. Soon, we hope to offer the employees of Deloitte member firms an integrated portal with dedicated real estate for member firm, DTT, and regional news. This has the potential to increase readership of DTT news stories dramatically, helping us align global communications with DTT strategy and deliver on our vision to be the Standard of Excellence."

Rachel Flanagan, DR editorial manager:

- **Understand your users' editorial preferences.** "Our homepage metrics increased dramatically after our redesign, based on our new editorial strategy. For example, the average number of visits to our stories has increased by about 150%. We learned, through the metrics, which types of stories were doing well and which were not, plus we devised new ways to get the member firms to pick up our stories and promote our initiatives, such as the CEO's blog."

Karen Frankola, director, internal communications and creative services:

- **Content is at least as important as design.** "The focus of the DTT Communications team over the past year has been more on improving the content of the sites, rather than the design, partly due to lack of a dedicated online designer. We know good design is important, but we think interesting headlines, captivating photos, compelling video, and candid stories built around people are critical. We redesigned our homepage to better showcase the fresh content we have been creating. Every time we build a new site, we try to outdo ourselves, but during the previous year, we had very limited services of a designer. Instead, our small team looked carefully at our metrics, conducted design research, surveyed our users, and focused hard on adding a lot of fresh, compelling content. Now that we've improved our content, we are planning to assess our users and conduct a major redesign before we move to a new platform."
- **A small in-house team can get the job done.** "DTT Communications has only three full-time people to create the homepage and major DTT sites. None of those people are designers. Two team members are under 25, with only a few years' experience. But all three worked extremely hard to make our global intranet compelling and also to promote global content and share best practices with our member firms. They educated themselves and applied limitless energy and enthusiasm to make our intranet relevant to Deloitte people around the world."

RESULTS / ROI

DR, which began as a basic knowledge sharing platform and host for integrated applications, has now shifted to become a center for communications.

The biggest impact the site has made on the organization is that it has encouraged employees to become more involved. The blogs, message boards, and polls have created a more active intranet, moving the dial from a repository to a communication platform.

That focus on communications means that the team has more opportunity to understand, from users, what information is the most valuable to them.

"We often hear from users that there is so much useful information on Deloitte Resources, but it's hard to find," says Jevtani. "Each site owner has taken the feedback into consideration when they update their site. We strive to only post the most useful information on our sites, so that it doesn't just grow as a KM repository."

High-Level Support Means Big Wins

DTT's success results in part from its unique positioning within the organization, and from the organization's restructuring that put Communications under Operations in 2007. "One of the first acts of the Global Managing Partner for Operations was to challenge the Communications team regarding return on investment for its various channels," says Frankola. "The decision was made to discontinue most print communication vehicles. This meant that Deloitte Resources wasn't just the primary internal communications channel for DTT, it was virtually our only channel."

In February 2008, the organization hired a new DTT Communications director—a position that had been vacant since the previous June, when the team was reorganized. Frankola says the new director quickly understood DR's importance to

internal communications, and began working with the director of Knowledge Management to resolve the difficult issue of how to effectively govern the intranet with so many different stakeholders.

In July 2008, the directors of DTT Communications, Knowledge Management, and Brand were officially put in charge of DR, which was previously run by a committee of several dozen people, directed by OIM. "This was a huge win that clearly put the most important business stakeholders as DR's owners," says Frankola.

In addition, she says, "the DTT Communications director created a new position, director of online strategy, to help develop a strategic vision for DR, working in conjunction with the other key stakeholders. Since this position has been filled by the current global Internet director, this move will help connect the global Internet and intranet teams so we can leverage our resources and eliminate duplication of efforts."

Several other staff positions have also been added to the core intranet teams for DTT Communications and Knowledge Management.

All of the changes occurred with the approval of the global managing partner of Operations, which shows very high-level support for DR. In addition, the DTT CEO has said DTT Communications efforts on DR are crucial to communicating DTT's vision and strategy. "So, in the past year, we have been able to dramatically raise the profile of DR among senior leadership," she says.

Adding Value

Several of the site's features have added significant value, including:

- ***Jim's blog*.** One of our most popular initiatives has been our CEO's blog," says Flanagan. "This is the one piece of content that is consistently picked up and promoted by the different member firm editors, so it is truly a global initiative with people around the world reading and commenting on Jim's entries."

  The CEO blog adds value by connecting people of the organization at all levels. Each blog is posted for an average of three weeks (the blog has an irregular schedule; some are up for a week before a new one is posted, while others are up for month). The blog consistently earns approximately 10,000 visits (in a three week period). This is significantly more traffic than any other piece of content. And some of the posts receive more than 50 comments.

- **DR homepage.** "The enhanced Deloitte Resources homepage has added tremendous value to Deloitte's communications by providing original, timely news stories—not only for readers on the global site, but for all member firm sites," says Jill Brower.

  DTT content writers create story "packages" that include original content, photos, and relevant links. Because each story is pre-packaged, editors on other sites can pick up the stories wholesale and feature them on their own sites. "So, even if member firm people are not navigating to the global homepage themselves, they're still reading our content on their own homepages," she says. "This ties back to the role of DTT Communications as setting the standard and providing best practices for other member firms."

  To push the stories out to the member firms, they include a *Deloitte Resources newswire* section in *Green Dot*, a monthly newsletter that goes out to all Communications, Marketing, and Brand professionals. The *newswire* includes a list of headlines and links to the most recently published stories on

the Global DR site to encourage other member firm editors and content managers to republish on their own sites (all of which is done seamlessly on the DR platform). "This allows other member firms to either use the stories wholesale or to localize them to their specific community," says Brower. "We also tag the links in the *Green Dot* so we can see how much traffic is coming from those links."

- ***Deloitte TV Network*:** The *Deloitte TV Network* makes videos created by both DTT and member firms accessible to every Deloitte employee globally. "For example," says Frankola, "in previous years, we posted video highlights of the World Meeting only on our *World Meeting* site, but a few months later, no one visited the site and no one could readily find the videos."

  Deloitte TV also provides a "one-stop shopping" experience for multimedia so the firm can get more use of the content than just playing a video once at a conference. And, in addition to expanding the reach of video assets created for a single purpose, the TV Network also can potentially save the firm valuable time and money by cataloging existing videos.

  "Videos are expensive," says Frankola. "If a member firm is planning its own partner meeting, a communications professional can visit the site and see what kind of videos are available. The firm can show one of the videos already made or even obtain footage from DTT Communications to customize the video for their own meeting."

  Deloitte TV has been so successful that other member firms are now creating their own *Deloitte TV* sites.

Metrics

"Since redesigning the Global Deloitte Resources homepage and putting more attention into the intranet as our primary communications vehicle, we have seen increased metrics across the board," says Brower. She cites these examples as evidence of these gains:

- Homepage visits increased by 136% between June 2007 and June 2008.
- The average number of visits to feature stories has increased by approximately 150%.
- For the *World Meeting* site, they saw a 200% increase in visits to the 2008 homepage versus the 2007 page.

Also, the team went from publishing virtually no original stories on the homepage to now publishing eight to 12 new stories monthly.

Environmental Resources Management (ERM)

Using the intranet

ERM is one of the world's leading providers of environmental consulting services. Its 3,500 staff members in over 140 offices in more than 40 countries are committed to providing a consistent, professional service to leading business and government clients, offering innovative solutions to manage environmental and related risks.

Headquarters: ERM doesn't have a single head office; board members are based in various locations around the world.

Number of employees the intranet supports: 3,500

Locations: Last year, ERM worked in 161 countries.

Annual sales: US $638.5 million gross (year ended March 2008).

Design team

Bonnie Cheuk led the overall design of the intranet, informed by a user-oriented Sense-Making Methodology. The design team includes four additional core people.

Members

Bonnie Cheuk, global head of information and knowledge; Roddy Fiddes, global knowledge facilitator; Philippa K. Smith, global knowledge facilitator; Karen Perkinton, global knowledge facilitator; Christopher Long, systems analyst; Andrew Arvidson, global technical lead.

SUMMARY

Imagine being a consultant and having the knowledge of every other consultant at your organization just a click away. The intranet team at Environmental Resources Management (ERM) made this idea a reality for employees in the realm of environmental consulting services.

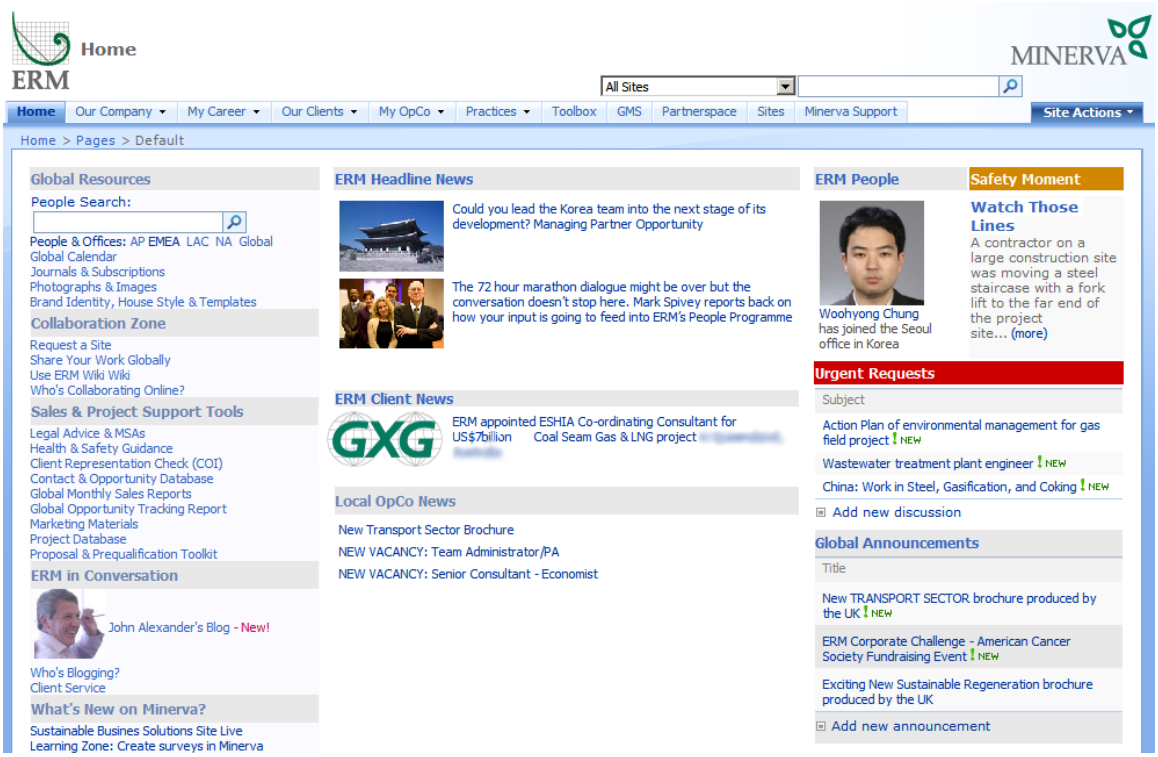
The intranet, *Minerva*, supports 3,500 international staff members located in more than 140 offices in more than 40 countries. One potential issue with such a distributed workforce is that knowledge might be stored in countless silos across the organization. But adding visible and simple features as part of the intranet's infrastructure prevented this problem. In fact, designers implemented several inventive collaboration features to enhance consultant collaboration, ultimately enabling them to give the best service to their clients.

Beginning on the homepage, employees get various types of news, information about new employees, safety information, requests for knowledge, announcements, and links that serve as a gateway to a multitude of information and features.

When employees turn on their computers, they see the latest news about the organization. Good summaries and enticing images make the news attractive to read. Client news, below the main headlines, offers information to motivate people about client wins. This type of information can also give consultants and salespeople ideas for future sales offerings.

Introducing new consultants to one another is another feature Minerva offers. The HR group manages the *ERM People* section, which appears in the homepage's upper right content area. Here, the name and a picture of all new employees and their locations give other employees a snapshot of new colleagues. Clicking through the link allows people to read more about the new hires.

To the right of this feature is the *Safety Moment* section. ERM work can be quite dangerous if done carelessly. Dedicating a top spot to this section on the homepage reinforces upper-management's commitment to safety for both workers and customers.



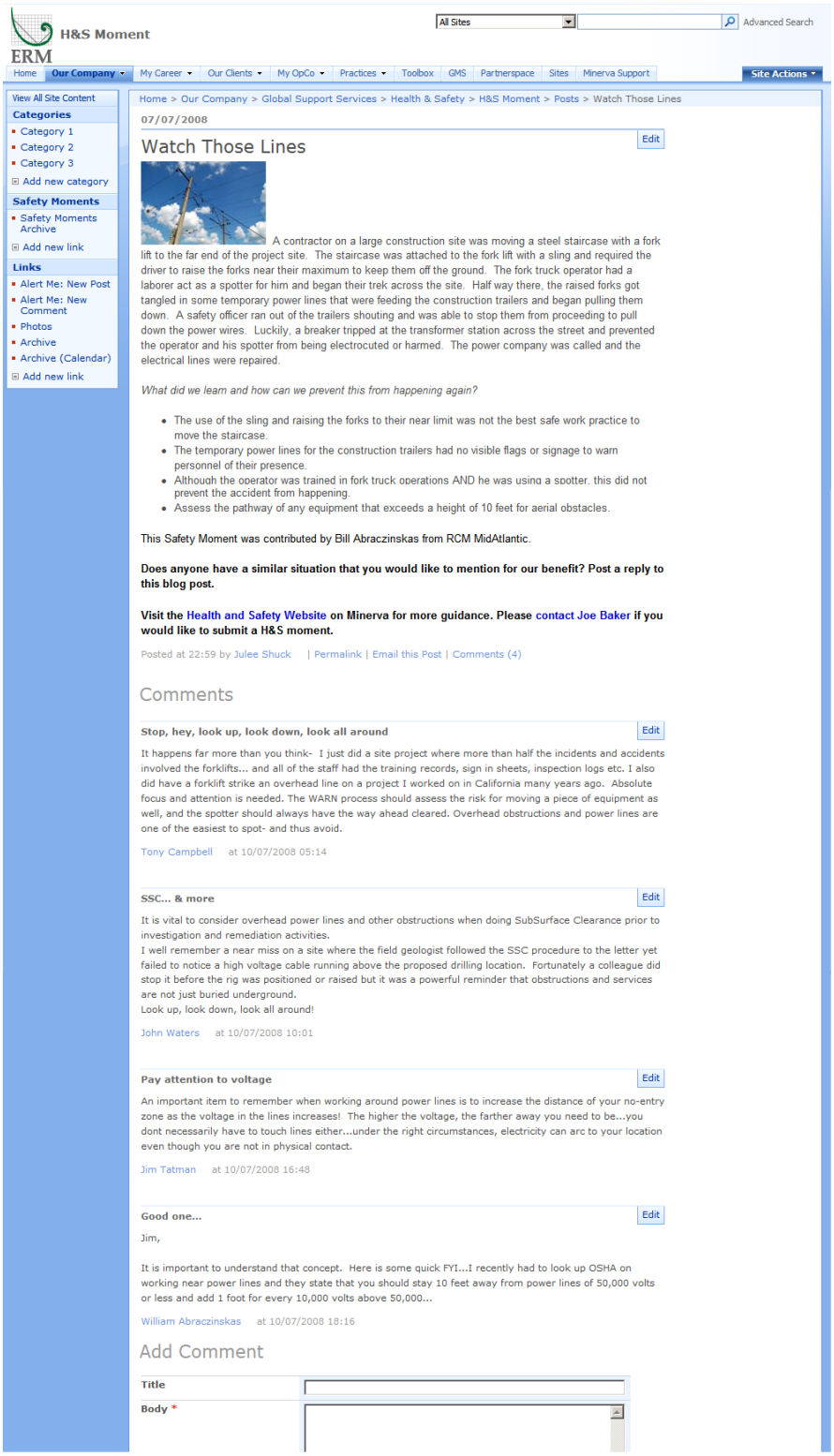
Pictured: The ERM intranet homepage offers various types of news, information about new employees, safety information, requests for knowledge, announcements, and links that serve as a gateway to other information and features.

The homepage's *Safety Moment* section leads to an area that lets employees share ideas and tips for on-the-job safety. The articles are short and simple. The writing is straightforward, telling a short story about a safety-related incident. Also, while it might provide details about a problem, it does so in a non-accusatory style. For example, one story tells of a forklift getting caught in some temporary power lines when the driver had to raise his forks higher than usual. But, rather than being severe, the writer empathizes with the driver, saying that this particular situation "required the driver to raise the forks near their maximum to keep them off the ground," while at the same time emphasizing that doing so was not good safety practice and should not be mimicked.

Later in the short article is a section titled *What did we learn and how can we prevent this from happening again?* A bulleted list outlines better safety practices for employees to follow. It then mentions the author's name and location.

At the end of the article, there is an invitation for users to share their own safety moments. This call to action asks: *Does anyone have a similar situation that you would like to mention for our benefit? Post a reply to this blog post.* The *Add Comment* section offers a *Title* and *Body* field for people to write their comments.

Finally, at the end of the post, there is a more formal reminder about the intranet's health and safety section: *Visit the Health and Safety Website on Minerva for guidance.* In addition to providing an inline link on that site's name, it gives users a link to a contact person to add a *Safety Moment* article.



Pictured: The *Safety Moment* articles discuss a real safety moment and how to prevent similar issues in the future. The writing's tone is helpful and non-accusatory. Users can respond to the stories and share their related comments, as well as click a link to the website's safety section.

10 Best Intranets: Environmental Resources Management (ERM)

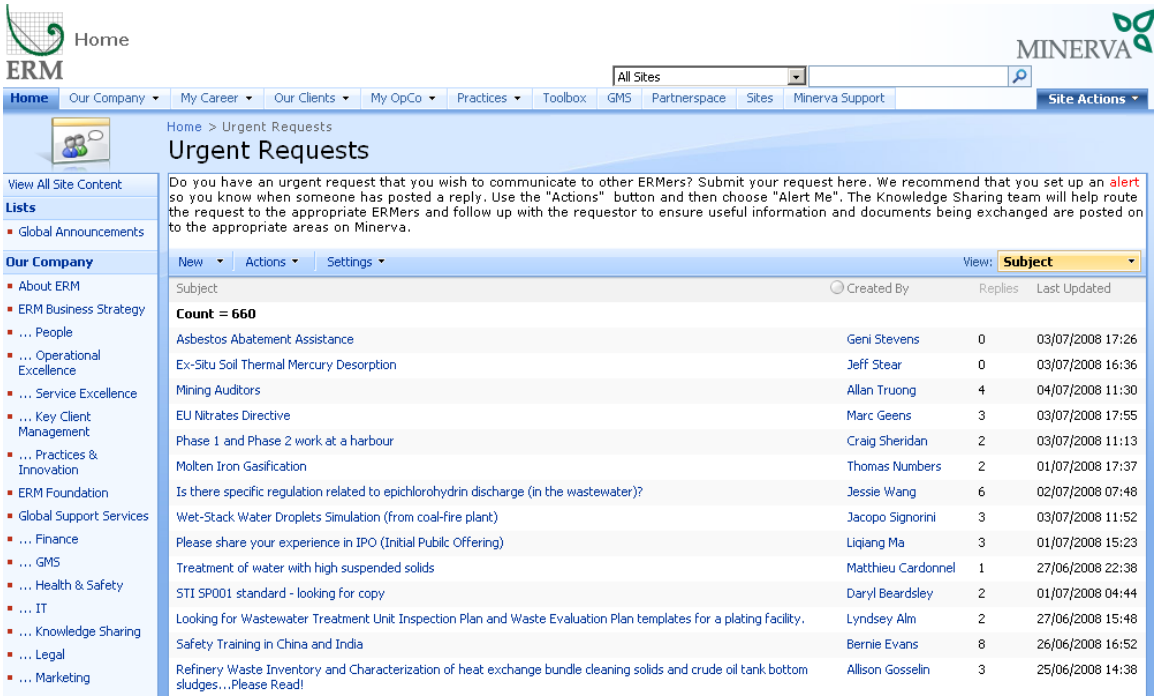
EMR consultants often face highly complex environmental issues. Rather that resolving problems in a vacuum, consultants are accustomed to using the intranet to ask for, and offer, help and expertise. The homepage's right-most column lists the three most recent help requests under the red *Urgent Requests* banner.

This feature has proven to be highly successful. In addition to having people share ideas more often, the posting area has reduced the amount of worldwide e-mails requesting assistance by 99%.

Several factors contributed to making this feature so well received.

- The feature was needed. Consultants need to reach out to other offices to learn and streamline their own work.
- Consultants want to help each other. Everyone likes to share good work they've done, especially if it can help a co-worker and, ultimately, the overall organization.
- People refer to the feature frequently and send in comments. In fact, people have come to expect responses from others within 24 hours of their posting. If there were a lot of requests that were never answered, who would ever write them again?
- Any employee can submit an urgent request, making the feature inclusive and popular.
- Reviewing and creating requests is a simple, visible process; people are not deterred from using the feature because it's too hard. Employees can add a request via an easy link on the homepage called *Add a New Discussion.*

The *Urgent Requests* area allows users to view, sort, respond to, and submit requests. People can choose subjects from a drop-down, and can view the subject, submitter, number of replies, and last updated date.



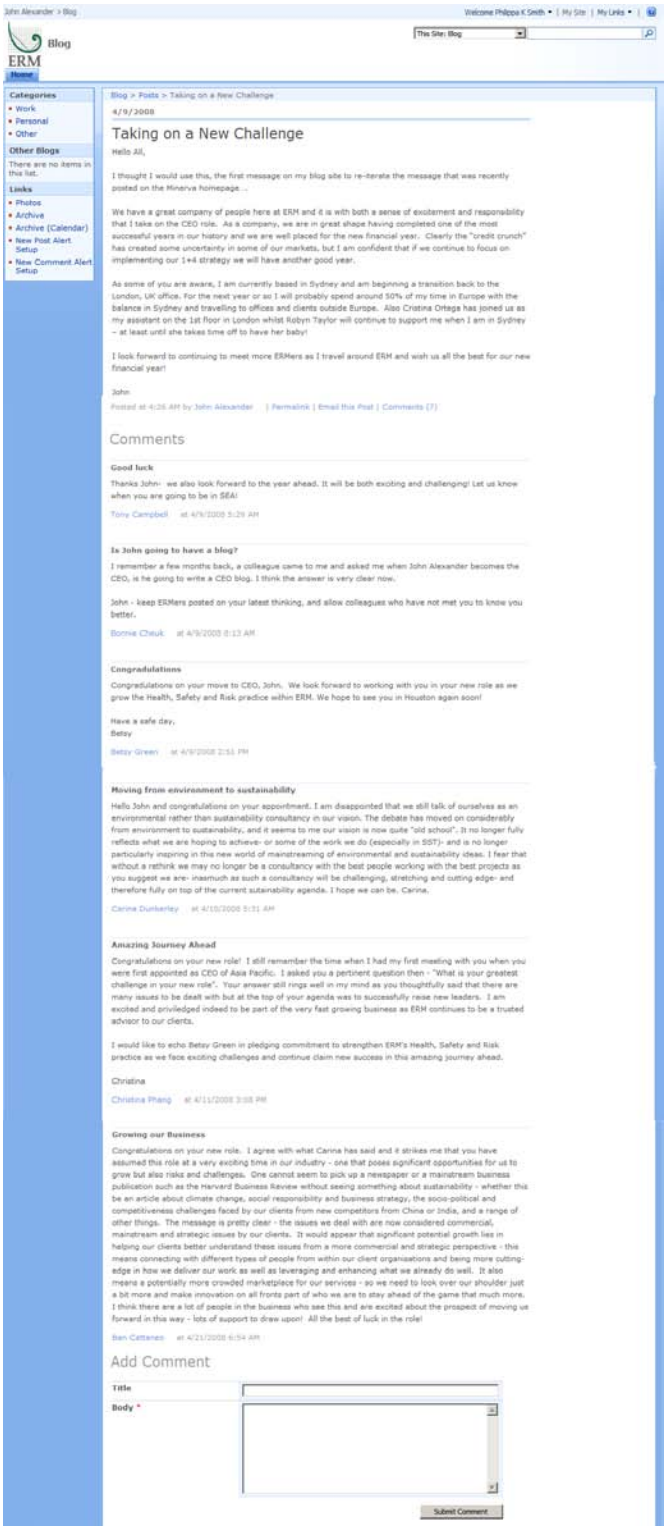
Pictured: The *Urgent Requests* area of the intranet allows users to view, sort, respond to, and submit requests.

While very valuable, *Urgent Requests* are not the only way the intranet's users can start a discussion or make a request from the entire workforce. The designers recognized that some requests and notices might be less urgent, but equally important. If users want to communicate with fellow employees without clogging the e-mail pipes, they can post a *Global Announcement.* This un-moderated announcement feature is visible on the homepage along with a link to *Add new announcement.*

So, ERM's intranet users can add and read announcements as well as timely information. And there is more. There is vision. This takes shape in *ERM Conversation*, a blog by CEO John Alexander. Every two weeks, Alexander updates employees about business direction or invites people to challenge the status quo. Alexander's goals are to encourage dialogue and give staff members insight into who he is and what his goals are for the organization. Having his letters posted as blogs enables people to read them at their convenience—and when they're most ready to take in the messages.

In the upper left hand corner of *ERM Conversation* is a summary of the current blog, plus a small picture of Alexander. Hits to this blog spike whenever the newest posting is highlighted on the homepage, with the word *New* next to the title.

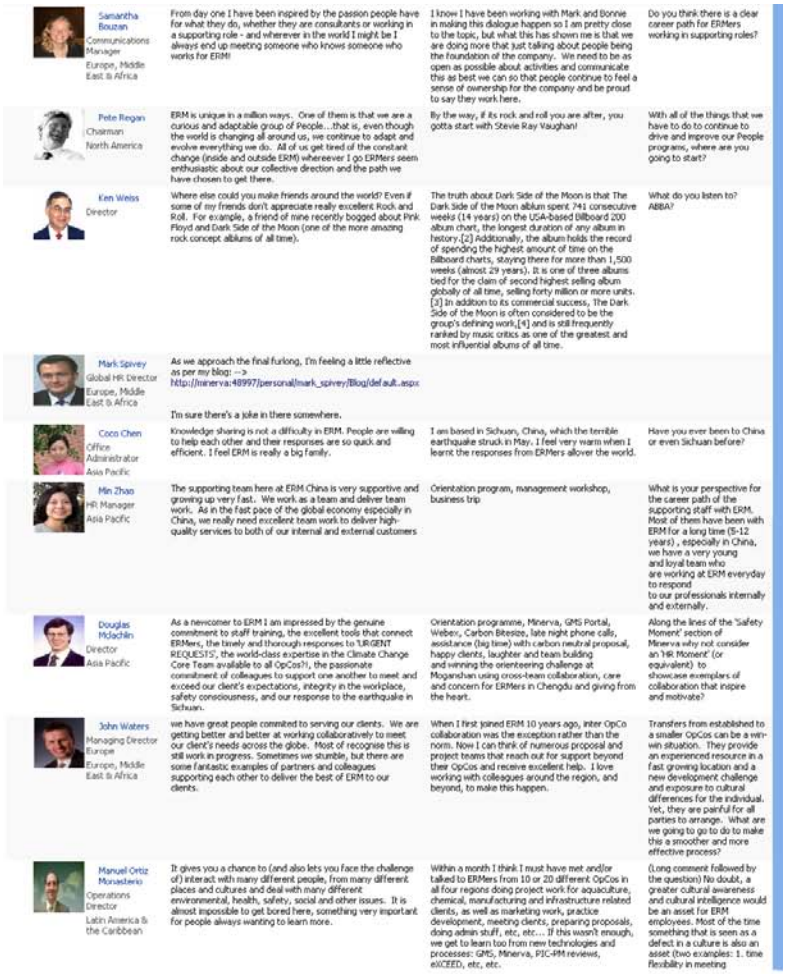
Clicking on the *John Alexander's Blog* link leads to the latest post, which also features links to past blog entries. People can easily post a comment to the blog. All comments are visible to all users, and no anonymous postings are allowed.



Pictured: Every two weeks, the CEO takes the opportunity to update the employees about business direction or invite people to challenge the status quo. He posts these as a blog rather than e-mails so employees can read them at their convenience, when they are most ready to take in the messages. Employees can also respond to the blogs via a simple form.

The CEO is one of several leaders who take advantage of the ERM intranet as a two-way communication tool. For example, in addition to a personal blog, the company's people director set up *I'm Listening*, a special 72-hour marathon dialog with the entire staff to discuss what it's like to work at ERM and how to continually improve things.

Many people responded. All of their responses showed up in a list, with their pictures next to their postings.



Samantha Bouzan Communications Manager Europe, Middle East & Africa	From day one I have been inspired by the passion people have for what they do, whether they are consultants or working in a supporting role - and wherever in the world I might be I always end up meeting someone who knows someone who works for ERM!	I know I have been working with Mark and Bonnie in making this dialogue happen so I am pretty close to the topic, but what this has shown me is that we are doing more that just talking about people being the foundation of the company. We need to be as open as possible about activities and communicate this as best we can so that people continue to feel a sense of ownership for the company and be proud to say they work here.	Do you think there is a clear career path for ERMers working in supporting roles?
Pete Regan Chairman North America	ERM is unique in a million ways. One of them is that we are a curious and adaptable group of People...that is, even though the world is changing all around us, we continue to adapt and evolve everything we do. All of us get tired of the constant change (inside and outside ERM) wherever I go ERMers seem enthusiastic about our collective direction and the path we have chosen to get there.	By the way, if its rock and roll you are after, you gotta start with Stevie Ray Vaughan!	With all of the things that we have to do to continue to drive and improve our People programs, where are you going to start?
Ken Weiss Director	Where else could you make friends around the world? Even if some of my friends don't appreciate really excellent Rock and Roll. For example, a friend of mine recently bogged about Pink Floyd and Dark Side of the Moon (one of the more amazing rock concept albiums of all time).	The truth about Dark Side of the Moon is that The Dark Side of the Moon ablum spent 741 consecutive weeks (14 years) on the USA-based Billboard 200 album chart, the longest duration of any album in history.[2] Additionally, the album holds the record of spending the highest amount of time on the Billboard charts, staying there for more than 1,500 weeks (almost 29 years). It is one of three albums tied for the claim of second highest selling album globally of all time, selling forty million or more units. [3] In addition to its commercial success, The Dark Side of the Moon is often considered to be the group's defining work,[4] and is still frequently ranked by music critics as one of the greatest and most influential albums of all time.	What do you listen to? ABBA?
Mark Spivey Global HR Director Europe, Middle East & Africa	As we approach the final furlong, I'm feeling a little reflective as per my blog: --> http://inserva:48997/personal/mark_spivey/Blog/default..aspx I'm sure there's a joke in there somewhere.		
Coco Chen Office Administrator Asia Pacific	Knowledge sharing is not a difficulty in ERM. People are willing to help each other and their responses are so quick and efficient. I feel ERM is really a big family.	I am based in Sichuan, China, which the terrible earthquake struck in May. I feel very warm when I learnt the responses from ERMers allover the world.	Have you ever been to China or even Sichuan before?
Min Zhao HR Manager Asia Pacific	The supporting team here at ERM China is very supportive and growing up very fast. We work as a team and deliver team work. As in the fast pace of the global economy especially in China, we really need excellent team work to deliver high-quality services to both of our internal and external customers	Orientation program, management workshop, business trip	What is your perspective for the career path of the supporting staff with ERM. Most of them have been with ERM for a long time (5-12 years) , especially in China, we have a very young and loyal team who are working at ERM everyday to respond to our professionals internally and externally.
Douglas Mdachlin Director Asia Pacific	As a newcomer to ERM I am impressed by the genuine commitment to staff training, the excellent tools that connect ERMers, the timely and thorough responses to 'URGENT REQUESTS', the world-class expertise in the Climate Change Core Team available to all OpCos?!, the passionate commitment of colleagues to support one another to meet and exceed our client's expectations, integrity in the workplace, safety consciousness, and our response to the earthquake in Sichuan.	Orientation programme, Minerva, QMS Portal, Webex, Carbon Bitesize, late night phone calls, assistance (big time) with carbon neutral proposal, happy clients, laughter and team building and winning the orienteering challenge at Moganshan using cross-team collaboration, care and concern for ERMers in Chengdu and giving from the heart.	Along the lines of the 'Safety Moment' section of Minerva why not consider an 'HR Moment' (or equivalent) to showcase exemplars of collaboration that inspire and motivate?
John Waters Managing Director Europe Europe, Middle East & Africa	we have great people commited to serving our clients. We are getting better and better at working collaboratively to meet our client's needs across the globe. Most of recognise this is still work in progress. Sometimes we stumble, but there are some fantastic examples of partners and colleagues supporting each other to deliver the best of ERM to our clients.	When I first joined ERM 10 years ago, inter OpCo collaboration was the exception rather than the norm. Now I can think of numerous proposal and project teams that reach out for support beyond their OpCos and receive excellent help. I love working with colleagues around the region, and beyond, to make this happen.	Transfers from established to a smaller OpCos can be a win-win situation. They provide an experienced resource in a fast growing location and a new development challenge and exposure to cultural differences for the individual. Yet, they are painful for all parties to arrange. What are we going to go to do to make this a smoother and more effective process?
Manuel Ortiz Monasterio Operations Director Latin America & the Caribbean	It gives you a chance to (and also lets you face the challenge of) interact with many different people, from many different places and cultures and deal with many different environmental, health, safety, social and other issues. It is almost impossible to get bored here, something very important for people always wanting to learn more.	Within a month I think I must have met and/or talked to ERMers from 10 or 20 different OpCos in all four regions doing project work for aquaculture, chemical, manufacturing and infrastructure related clients, as well as marketing work, practice development, meeting clients, preparing proposals, doing admin stuff, etc, etc... If this wasn't enough, we get to learn too from new technologies and processes: QMS, Minerva, PIC-MM reviews, eXCEED, etc, etc.	(Long comment followed by the question) No doubt, a greater cultural awareness and cultural intelligence would be an asset for ERM employees. Most of the time something that is seen as a defect in a culture is also an asset (two examples: 1. time flexibility in meeting

I'm listening

Thanks to everyone for continuing to to post their thoughts on Minerva.

As well as the comments that have been placed here, I've also received a number of e-mails from ERMers with suggestions about various issues that we need to address in order to improve our current approach. I know that it can sometime be uncomfortable to make suggestions about improvements, particularly in a public forum, but I would like to encourage these so that we can start to build an understanding of what we need to be focusing on. As a result, we've updated the feedback form so that instead of just asking me a question you can also make a suggestion about any idea that you have around improving what it's like to work at ERM. I look foward to hearing from you. If you'd prefer to e-mail me directly, please feel free to do so.

In terms of some of the questions that have been posed recently, the easy questions to answer are around my travel plans; I'm hope to head out to AP in August for the PT induction session and I haven't yet been to China but hope to to do so soon. In terms of what we are doing to make it easier to move our people around the network, we are just starting some work to re-energise the formal transfer/secondment policy so that all ERMers understand how the company will support them in working outside their home country, in parallel with finding a way to share details of our resource requirements so that we can better match supply and demand. And as far as intercultural awareness is concerned, I agree that we would all benefit from understanding some of the differences between national cultures and we're already doing some thinking around what this might look like in practice.

Please do keep the comments coming in.

Posted at 5:11 AM by Mark Spivey | Permalink | Email this Post | Comments (1)

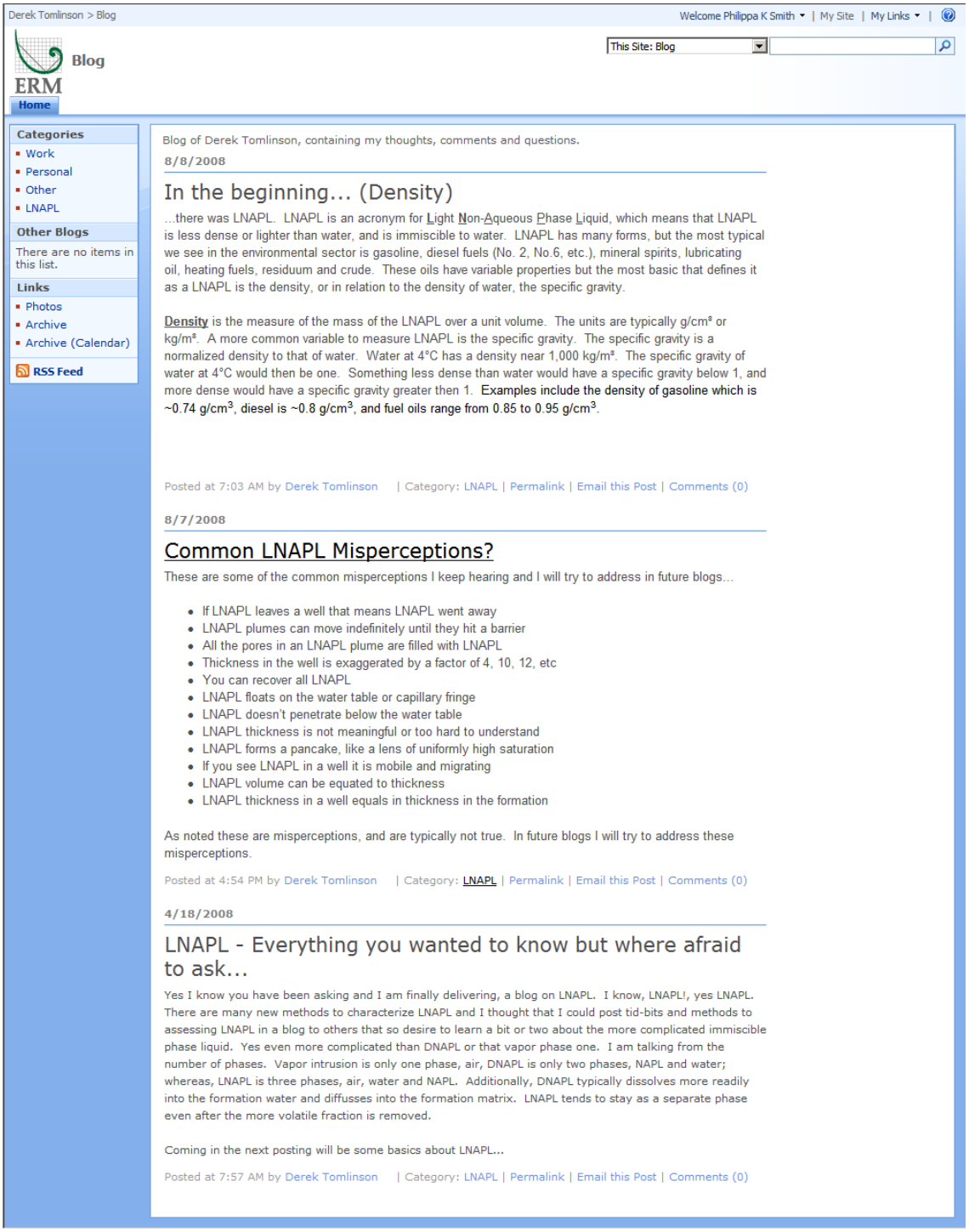
6/30/2008

How do you have a conversation with thousands of people?

I'm just back from an "Open Evening" at my daughter's school. We're going through the process of working out which school we would like her to go to in a year's time, which involves us taking her to visit a number of different schools and trying to work out which one will be the best for her. These events take place in the evening and tonight, in the process of trying to put her to bed, my daughter deployed the classic diversion technique of trying to engage me in conversation: she asked me what I was going to do before I went to bed. I told her that I was going to start a conversation with thousands of people across the globe - at which point she told me to stop being silly and asked me to leave.

Pictured: The people director's 72-hour *I'm Listening* dialog enticed responses for many employees.

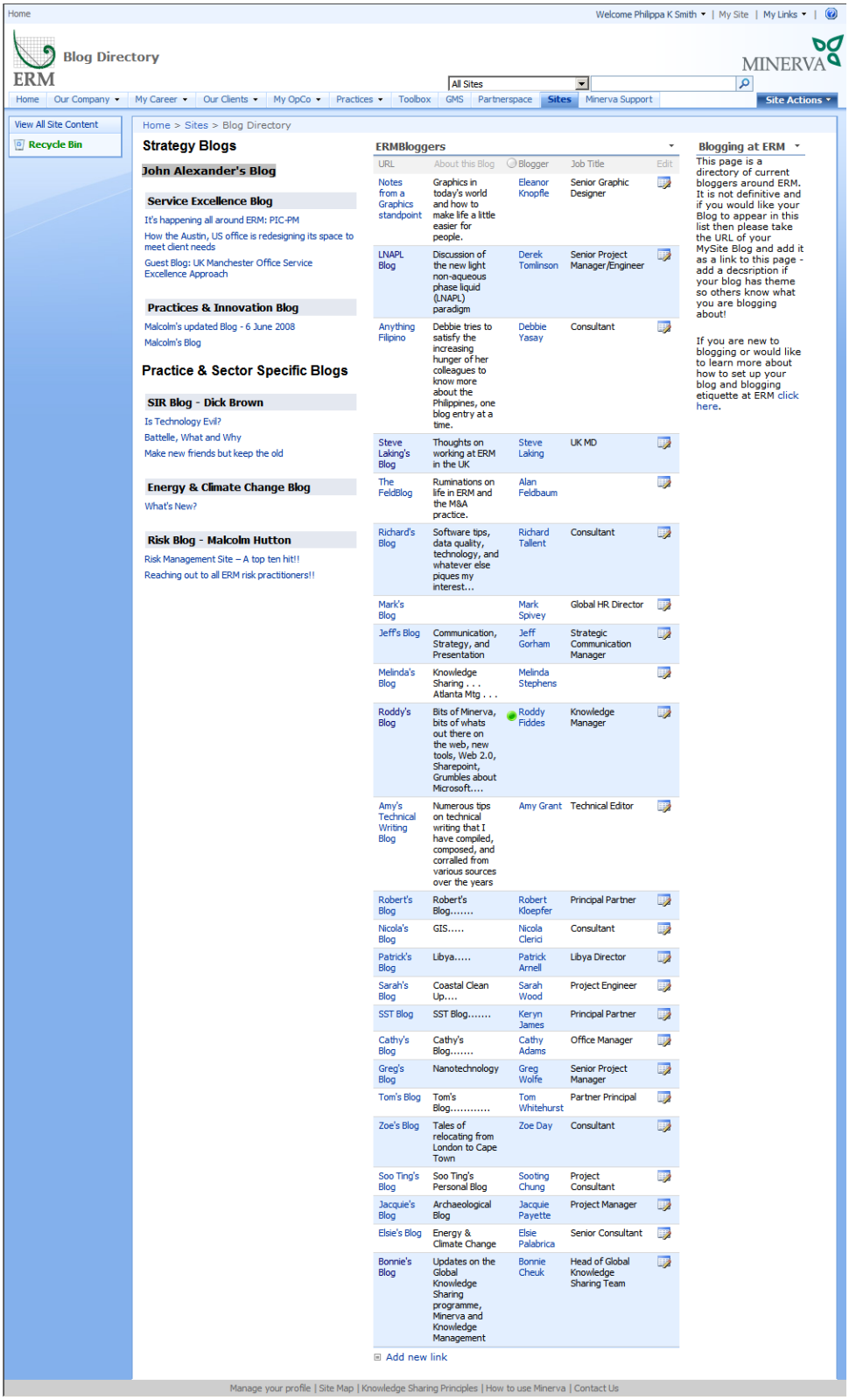
While manager's blogs are important, the intranet team also realizes the potential of individual knowledge sharing. Enabling everyone, not just the CEO or managers, to blog shows the organization's commitment to hearing from everyone and sharing ideas. Thus, all staff members are encouraged to use the ERM wiki. There is no approval process, so employees can immediately create and use their own pages.



Pictured: Any employee can use the ERM intranet's wiki to create a blog. There is no approval process, so users can launch their blogs immediately.

Employees can publicize their blogs on the *Who's Blogging* page, a directory of blogs at the organization. This directory shows the name of the blog, the URL, and the blogger's name and job title.

A link to *Who's Blogging* appears on the homepage under the CEO's blog link. If users choose to publicize their blogs, they can find instructions for doing so in the right-side margin on the blog directory page.

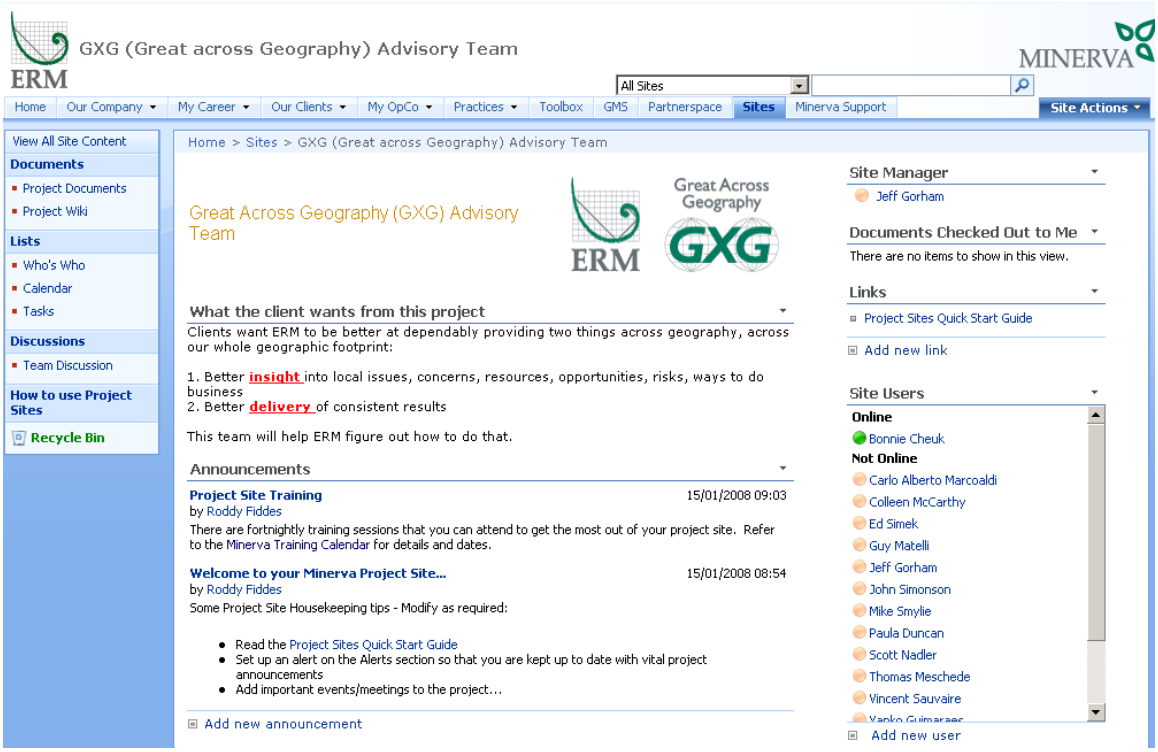


Pictured: The *Who's Blogging* area serves as a directory page for bloggers on the intranet. Although blogs are not automatically added, people can easily add their blogs to this list.

In addition to blogging about topics of their choice, any employees who can articulate a clear business reason for doing so can set up a site for a specific project. They'll then receive a link to their new intranet area within three days. Such project areas let people participate in any number of project-related activities, such as assigning tasks using roles and a who's who list, sharing and reading news, using the project calendar, and managing documents.

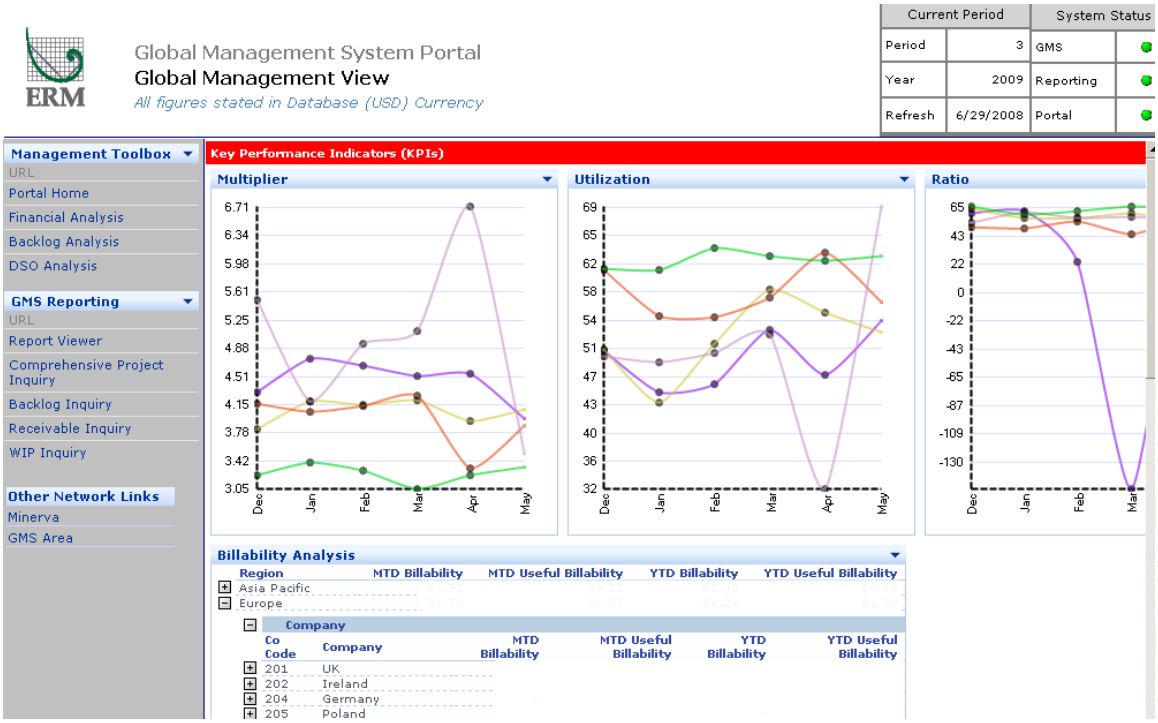
The main page clearly outlines the project's goals as a constant reminder to keep all team members on track. The *Announcements* section houses the most current news for the team. The *Site Users* lists all of the people working on the project who use the intranet project area, and notes whether people are currently online and available for chatting.

Using the *Documents* link in the left-side navigation, users can save any e-mails from team members or the client to a library, as well as create, edit, and track versions of any documentation required. The left-side navigation also lets users access and participate in discussions, view the calendar, and see the summary of team members.



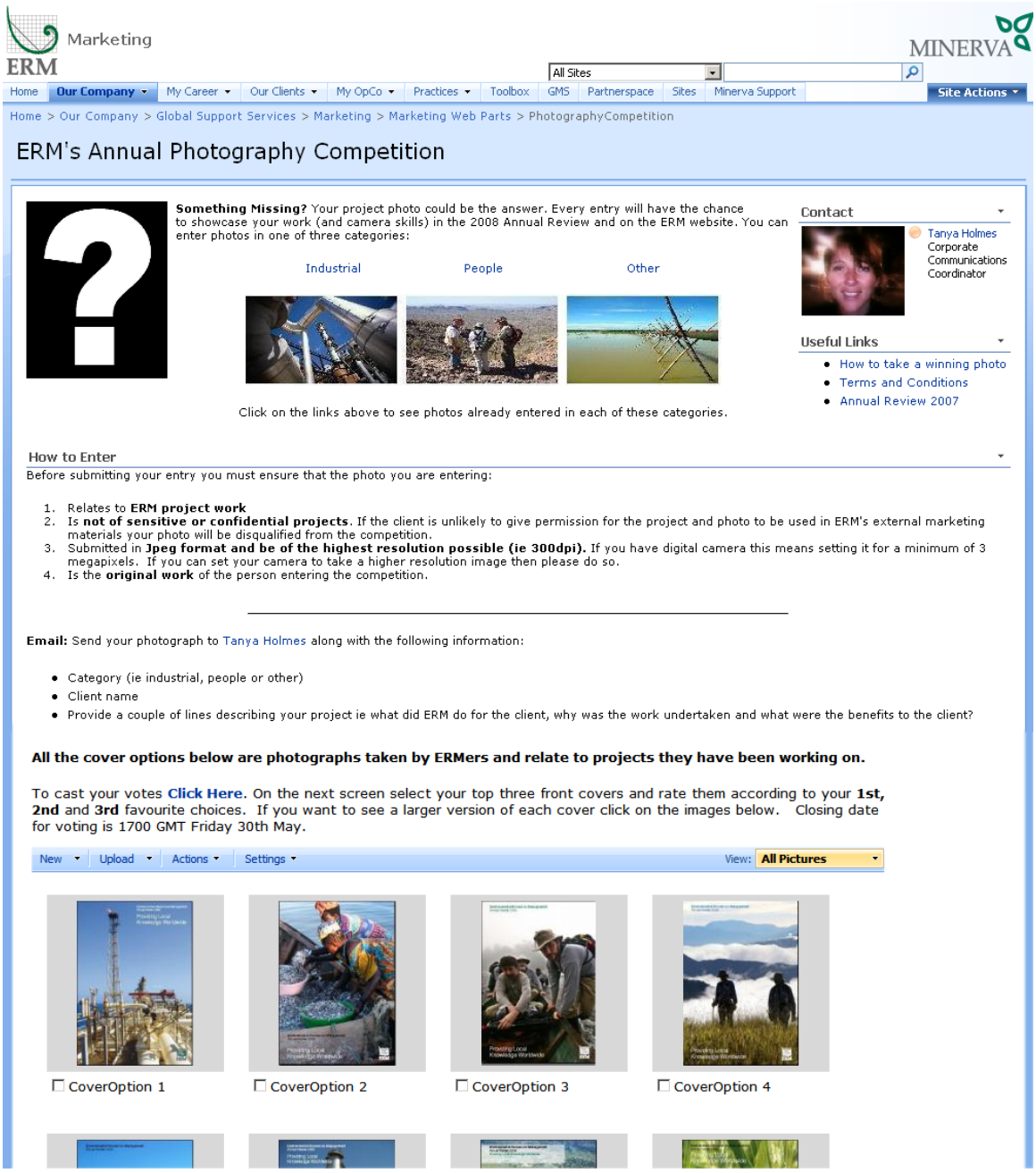
Pictured: Users can set up intranet project areas within three days. Project areas let team members communicate, make announcements, share and edit documents, view the calendar, and engage in other project-related activities.

Users can also view the *Project Accounting Portal*, which gives consultants an overview of a project's current status at a glance. The portal was custom built by the intranet team, and gathers current, relevant data from ERM's project management and accounting system. The data that users see depends on their job role. For example, global directors see overviews of all projects that fall under their purview. In contrast, first-level project managers see a detailed analysis of only their particular project or projects. (The screenshot below, for example, shows global management data for a finance director.)



Pictured: The *Project Accounting Portal* gathers current, relevant data from ERM's project management and accounting system. Users see different data, depending on their job role. This screen shows an overview of global management data appropriate for a finance director.

As another example of a "social" feature, ERM employees were encouraged to submit photographs they took to compete for the chance to be featured the cover of the organization's annual report. And those who are not photographers could participate in this contest as well—as voters, rather than contestants. In June 2007, the intranet team launched a poll on the homepage to encourage all employees to vote for their favorite picture.



Pictured: Employees participated in a photo competition for placement on the cover of an annual report. Employees also voted for the winner.

The ERM intranet started as the first product launched to support ERM's global knowledge sharing vision. It launched on 24 May 2007, and evolved according to changing business needs and user expectations. The intranet excels at collaboration features, not just enabling but also encouraging all employees to participate. The intranet team studied their users and found that their need to communicate coincided with upper-management's goals. The intranet designers exhibited patience, waiting until the market was right and introducing wikis and blogs only after the user group was primed and ready for them. This intranet team is made up of great designers who see the big picture.

BACKGROUND

Minerva was launched in May 2007 as an effort to support ERM's global knowledge sharing vision. Since its launch, it has evolved according to changing business needs. Among the first wave of changes was a homepage redesign. Other changes reflect a gradual evolution: adding features to sites and developing content over time.

The initial roll out of the site was with Microsoft SharePoint 2007 as an out-of-the-box implementation.

INTRANET TEAM

The intranet staff comprises a core team of nine people:

- **Pete Regan,** CEO (2000 to March 2008), chairman (Apr 2008 – present), executive sponsor
- **Tom Whitehurst,** initial partner in charge of the intranet pilot programme
- **Bonnie Cheuk,** global head of information and knowledge
- **Roddy Fiddes,** global knowledge facilitator (administrator)
- **Philippa Smith,** global knowledge facilitator (training and change management)
- **Karen Perkinton,** global knowledge facilitator (communities of practice)
- **Christopher Long,** systems analysts (global financial system)
- **Andrew Arvidson,** global technical lead—portals and collaboration
- **Samantha Bouzan,** global communications manager
- **Christina Apostolou,** global knowledge coordinator

The core team is augmented with approximately 80 site managers and 220 knowledge champions worldwide. These team members work in partnership with the core intranet team to collectively manage ERM's intranet.



Pictured: The ERM intranet team: (top, left to right) Bonnie Cheuk, Pete Regan, Tom Whitehurst, Roddy Fiddes, Karen Perkinton; (bottom, left to right): Pippa Smith, Chris Long, Andrew Arvidson, Samantha Bouzan, Christina Apostolou.

Governance

The Knowledge Sharing and Communications (GKSC) Team is "owned" by ERM's Chairman Pete Regan. The GKSC Team reports directly to Regan and works in partnership with (but does not report to) the Group IT and Group HR functions.

"The GKSC Team's close alignment with the company's chairman helps position the intranet as a rounded enabling tool which supports the overall business strategy," says Bonnie Cheuk, global head of information and knowledge. "The independent status of the Global Knowledge Sharing and Communications Team allows it to be truly multidisciplinary and sends a message that this is about breaking down silos with the aim of delivering benefits for the company as a whole."

The Minerva intranet team was originally established as part of the roll out of a Global Knowledge Sharing Program in 2006, led by then-CEO Regan. Cheuk was recruited as the global head of information and knowledge in order to establish both the overall ERM knowledge sharing strategy and how the intranet project would accomplish it.

The Evolution of a Platform

From September 2006 to January 2007, three team members—Pippa Smith, Roddy Fiddes, and Andrew Arvidson—focused on designing Minerva and getting the platform ready. When Minerva stabilized, Smith's role evolved into training and change management to help introduce Web 2.0 features to support cross-team collaboration. Fiddes' role evolved into understanding user needs and prioritizing change requests to further enhance and develop Minerva.

Minerva was officially launched on 24 May 2007. As it became more established (mid-2007), a new team member, Karen Perkinton, was recruited to advise on building communities of practice and ways to use Minerva effectively as an enabling tool to link up colleagues.

As Minerva became recognized as the one-stop shop to access company global resources, the Global Financial Management development team further enhanced the system and made it Web-based and fully integrated with Minerva.

Over time, Minerva was fully adopted by ERM staff and endorsed by senior leaders as the primary channel for internal communications, and the global internal communications manager become an official member of the intranet team.

External Resources

The intranet design was and is done in-house. An external development team was engaged only to improve SharePoint functionalities based on requirements developed by the in-house team in consultation with end-users.

Budget

Though the exact figure is confidential, according to Cheuk the annual budget for the ERM intranet is in the range of US$500K–US$900K per annum. This figure includes some IT infrastructure costs; additional costs are funded through the Group IT infrastructure budget.

Salaries for the five core team members are included in the budget range. Different offices across ERM fund the 80 site managers and 220 knowledge champions who support the core intranet team.

GOALS AND CONSTRAINTS

Minerva was envisioned primarily as a tool to support the organization's global knowledge sharing vision.

"We want everyone at ERM to be able to quickly tap into one another's expertise and access relevant information/documents in order to provide the best solution for our clients and to be successful in growing our own careers," says Cheuk.

The four specific goals of Minerva are illustrated in the cartoon below:



Knowing the importance of stating and communicating goals, the team commissioned an illustrator to create this cartoon. The strip was meant to summarize the goals in an understandable way, and act as a constant yet fun reminder to help keep the team focused.

Enabling Employees to Think for Themselves

"Minerva is designed to be a user-oriented intranet with the belief that 'employees can think for themselves,'" says Cheuk. "It enables employees to co-create meaning and have genuine dialogue on a peer-to-peer level and with senior managers."

To facilitate that dialogue, the Minerva team has employed Web 2.0 technologies.

Cheuk says, "The Minerva team believes that by using Web 2.0 to engage with the employees to develop shared understanding of the company direction, ERM employees are empowered to make decisions which are most beneficial to the company."

Creating an environment for this kind of active exchange required the team to make design decisions that would support the dialogue. Brenda Dervin's Sense-Making Methodology informed these decisions. Below are assumptions from Sense-Making about users and how they create meaning from information:

- Sense-Making assumes that reality is sometimes orderly and sometimes chaotic. There is no objective reality out there that can be separated from the employees.
- Employees, with different backgrounds and experience, have to make sense of their day-to-day working lives so as to come up with their own "observations" or create their own meaning when they interact with intranet information.
- Knowledge or information, defined as the sense being made or unmade, cannot be transmitted like water from one bucket to another.
- Different employees might come up with different "observations" and interpret the same piece of intranet information in different ways.
- In large organizations, the people in power (such as senior managers) very often decide whose observations are preferred. For example, they decide

what are considered "best practices" and how to interpret the company's strategy. Employees' voices, if different from those in power, are ignored or suppressed.

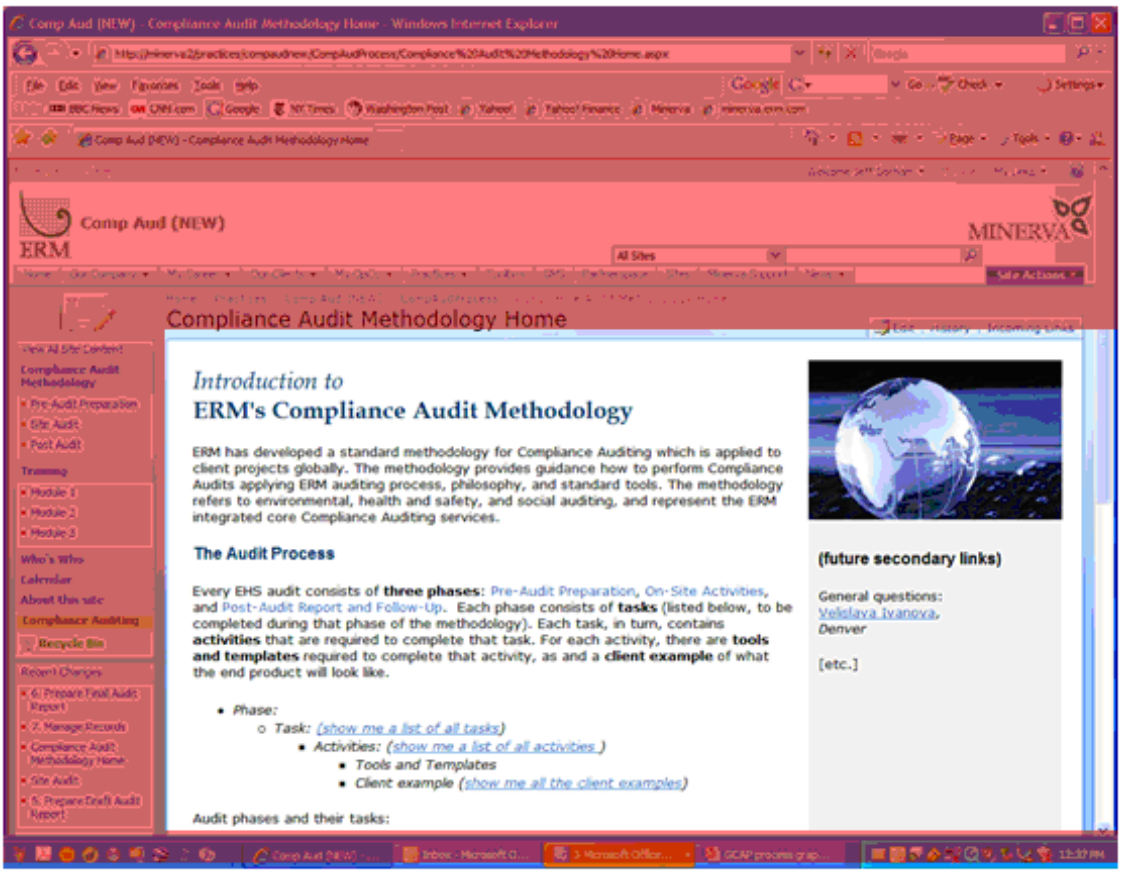
- However, if an employee doesn't share the same meaning as the people in power, no matter how much a message is polished and how many times it is shared on the intranet, it will not create any impact. Employees will just ignore the message.

Constraints

"The MS SharePoint system itself imposes constraints to the enhancement of Minerva," says Cheuk. "Our aim is to use out-of-the-box features as much as possible. However, if we want to design non-standard features, that requires additional development work."

Cheuk also noted that SharePoint's out-of-the-box screen size is quite small and both the global and left-hand navigation bars take up a lot of space.

For example, analysis has shown that only 50% of the available screen on most Minerva pages is available for content. This is as much an issue with IE7 as with MOSS, and although bigger screens mean more space, this is a typical laptop-sized window.



Pictured: The MS SharePoint system itself imposes constraints to the enhancement of Minerva. Although the team's goal is to use out-of-the-box features as much as possible, this screen shows how only 50% of the screen is available for content on most Minerva pages.

TIMELINE

Cheuk joined ERM at the end of July 2006 as the global head of information and knowledge. She carried out in-depth user studies that included user testing with prototypes, a heuristic evaluation, studying the server logs, and user interviews and surveys. These activities took place from September to December 2006, when a detailed specification was drawn up. Development took place from January to April 2007, leading to the launch in May 2007.

Key project milestones are outlined as follows:

MINERVA PROJECT TIMELINE	
Date	**Event**
Pre-2006	Discussions start on developing a knowledge sharing platform.
	Plans are drawn up and a budget is agreed upon.
2006	
January	Tom Whitehurst appointed partner in charge of the project, supported by Global Knowledge Facilitator Philippa Smith and Global Technical Lead Andrew Arvidson.
March	A High-Profile Environmental Impact Assessment Discussion Group is launched to discuss and decide on the best ways to share best practices, manage risk, and provide documents and so on that will support the practice worldwide.
May	*Mergers and Acquisition* pilot intranet site launched.
July	Cheuk joins ERM as global head of information and knowledge.
August	*Global Risk* network launched, having been developed in the same way as the *Mergers and Acquisition* site.
	Cheuk tours North America to gather user requirements.
October	Cheuk tours Asia Pacific to gather user requirements.
	Knowledge Sharing pilot portal area launched.
	Pilot *Climate Change* network launched.
	ERM establishes its Global Knowledge Sharing Strategy.
November	Global competition launched for ERM staff to name the portal. The vote results in the final name: Minerva.
2007	
January/February	Intranet team size increases by two: • Roddy Fiddes is hired to strengthen the team's technical capability to fully understand and exploit SharePoint features and to support content management and collaboration. • Karen Perkinton is hired to strengthen the team's capability to build and nurture global communities of

	practices—in particular, to introduce an approach and framework to link up practitioners worldwide to support business growth, delivery, and cross-team collaboration.
February 28	Pilot ends.
	Work begins on building Minerva and creating sites.
March	Migration of information from previous knowledge sharing database and pilot portal begins.
	Cheuk visits Latin America and Caribbean region to gather user requirements.
	User testing and feedback carried out to help shape Minerva for launch in May.
April	*Air Quality* site goes live.
	Begin training power users—a group of about 300 enthusiastic employees who are champions of the company and of what the Knowledge Sharing Program was aiming to achieve.
May 24	Official launch of Minerva.
August	Gather key feedback from colleagues in Asia Pacific.
November	Completed post-launch six-month review and demonstrate initial benefits.
December	Minerva wins *EBJ* (*Environmental Business Journal*) organizational innovation award.
2008	
January	Homepage redesigned to meet users' growing and changing demands and expectations.
February	Annual Knowledge Champions Meeting (17-19 Feb 2008).
March	Amalgamation of the Knowledge Sharing Team with internal and online communications team.
May	Celebration of Minerva's first birthday includes launch of 2008 Knowledge Sharing Awards.
June	Launch of *Global Financial System* portal, which integrates well with Minerva.
July	Launch of non-VPN access to Minerva.
October	ERM shortlisted for Global Most Admirable Knowledge Enterprise (MAKE) and won the Hong Kong MAKE Award.

USERS

Everyone at ERM uses Minerva—from consultants, administrators, and graphic designers to HR, IT, communications, and finance staff—to accomplish tasks such as sending an urgent request for information or announcing a new initiative to inform people about the latest performance figures.

USER TASKS

Minerva's features and functionality enable users to perform critical functions at every step of their day. Typical tasks it supports are listed below in order of business needs, based on user feedback:

1. **Finding colleagues:** Identifying phone numbers, area of expertise, CVs.
2. **Internal communications and staff engagement:** Company news and new hires are reported and updated on the Minerva homepage every day.
3. **Financial management and staff utilization:** Minerva directly linked to the company's global management system (GMS).
4. **Project management:** Project sites centrally manage projects and store documents and actions to help teams stay connected and informed.
5. **Key client collaboration sites:** These sites help users identify and pursue client opportunities.
6. **Community sites:** Help build capabilities in specific solution and technical areas, and are adaptable to specific needs.
7. **Coordinating training events.**
8. **Business strategy discussions:** These appear on the CEO and theme leader blogs as well as on interactive FAQs.
9. **Facilitating global competitions and campaigns.**

DESIGN PROCESS AND USABILITY ACTIVITIES

Overview

The Minerva team used a variety of methods to involve the users throughout the planning and design phases.

User testing of design prototypes: Minerva's launch used MOSS 2007, but the portal was initially designed on SharePoint Portal Server 2003. The pilot was accessible to the whole company and user feedback was gathered to help shape the 2007 development.

Studying the server logs: Usage stats are gathered and analyzed on an ongoing basis to both educate the team and shape feature development.

Heuristic evaluation (expert review): Conducted mainly by Cheuk, based on her previous experience.

User interviews: Interviews and narrative capturing carried out during site visits (see section below).

Leveraging evangelists: A group of approximately 300 enthusiastic employees were identified prior to the 2007 launch. These "power users" were champions of the company's vision and were enlisted for early training. The hope was that they could act as evangelists for the new intranet.

Initially, the power users group consisted of individuals who were nominated by local operating company heads and agreed to take on this role. Over time, the group has evolved as people's roles have changed and new people are employed. The current power users aren't technophiles, but rather are people interested the intranet team's goals and want to further Minerva's improvement. They are, according to Cheuk, "some of our greatest advocates." The power users also work to pass on the training they receive so that everyone has the potential to become a power user.

Pilot Phase Surveys

During the project's pilot phase, the team conducted surveys with users either via e-mail or in person. The first pilot, *Mergers & Acquisitions*, was used as a way to survey future users and find out how they would use the tool, what they wanted, and what they thought of it. The team used a Web-based survey to gather feedback and input. The survey was available to all M&A practitioners—about 400 people worldwide.

Once the survey went live, users could provide feedback and tell the team what they did and didn't like. Based on the success of this pilot, other practices saw what they could have and began requesting similar pilots for their groups.

It was about this time that Cheuk joined ERM and spent three months interviewing ERM staff to find out what they wanted from their knowledge sharing platform. The success of the M&A pilot resulted in similar pilot sites being rolled out for both the Risk Practice and Climate Change practitioners.

The pilot highlighted two unfulfilled requirements:

- The requirement for employees to collaborate across time-space using collaboration tools.
- The requirement for employees to interact with both information and one another rather than passively consuming information published by some authority source on the intranet.

During each office visit, a computer terminal was set up in a meeting room with a Minerva team member on hand to talk to staff members at all levels. The goal was to gain insight into users' reaction to Minerva design, particularly the homepage, which is set as a default page for all staff.

User Interviews: Collecting Thousands of Narratives

In late 2006, the Minerva team did in-depth user research, conducting interviews over a three-month period. Their goal was to identify the most pressing issues affecting ERM employees. The research activities focused on identifying the challenges that users encountered accessing information and expertise to support the sales effort, deliver client work, and grow their careers within ERM.

The team employed a methodology informed by Snowden's narrative research approach. This methodology involves asking indirect questions during informal conversations—"not focusing on asking what people want from the intranet through formal interviews, but informally discussing what employees do, think, and feel as part of their day-to-day work," explains Cheuk.

The researchers gathered over 1,000 narratives from more 300 colleagues based in 40 different countries. "The results of this research helped to shape the final design and implementation of Minerva," says Cheuk. "The findings of the three-month user study revealed employees' real needs."

As a result of these findings, the team decided to use SharePoint 2007 instead of SharePoint 2003, as the newer version provides additional collaboration tools and Web2.0 features that let users generate content.

Minerva team members continue to gather narratives from staff on a monthly basis to ensure they stay up to date with what ERM employees need. One year after Minerva launched, the team had collected 5,000 such narratives. New requirements are logged in a change-request log for analysis and prioritization.

The narrative process is supported by a Knowledge Sharing Champions Network made up of highly active knowledge facilitators/intranet site managers who collect and send the central team a constant stream of feedback from users based around the world. The site also features an on-line comment list, inviting all users to tell the team what they think.

Evolving the Homepage

Since its launch, the initial homepage has been completely revamped. User feedback directly informed these changes, as the following examples show.

Challenge: Staff members are not aware of the availability of frequently needed resources, collaboration tools, databases, and sales reports.
Solution: The team creates a list of quick links for these items on the left side of homepage 2.0.

Challenge: Staff members should see country-specific company news on their homepages, rather than just global company news.
Solution: The Minerva team introduces the Target Audience Web, part of which allows the staff to see their own local news, depending on their location.

Challenge: Staff members report that they really like the *ERM Headline News* and *ERM People* areas and want both to be updated more often.
Solution: The publishing calendar is shortened from a weekly update to updates every two days.

Challenge: ERM's Health and Safety culture needs to be strengthened and promoted to all employees.
Solution: The Minerva team introduces the *Safety Moment* feature, which is changed weekly.

Results that Surprised the Team

The user research yielded some results that surprised the research team. Cheuk discusses a few examples:

- Though transference is a common finding in these types of studies, the ERM team was somewhat surprised that users often transfer their experience of the Internet to their expectation of an intranet and therefore expect more from the system. For example, they expect a "Google" type search.

- When asked directly, all staff members generally say they welcomed the CEO blog. However, usability findings show an extreme result where some users read the CEO blog regularly, while others ignore it completely, even though it is on the homepage.
- According to usability stats, having core teams and/or facilitators within a practice work area seems to encourage higher usage for other staff within that practice work area.

Actionable Results

The Minerva team has made great efforts to act on specific user feedback. Following are some examples of specific changes the designers have made.

- To make navigation easier, they created clearly defined key sections.
- They added *Quick Links* to frequently used tools on the left side of the screen.
- At ERM, health and safety is a high priority, so the team gave it a prominent spot on the homepage. The section is updated weekly and is linked to a blog that everyone can comment on to share health and safety experiences and help prevent similar accidents from reoccurring.
- The *Urgent Requests* feature has been a huge success and thus has earned a prominent spot on the homepage. In this area, anyone can post a request for urgent information or resources; the feature has reduced the amount of worldwide e-mails sent by 99%.
- On the basis of user feedback, the team reduced the amount of homepage text, including to display only the headlines of featured *News* articles.

Continuous Feedback/Ongoing Improvement

A site is never really done, and the intranet team recognizes that changes will always be necessary. Team members are planning for this inevitability and have instituted mechanisms to make sure they continue to hear from the users.

The Minerva team continues to gather narratives from employees on a monthly basis. A year after Minerva launched, the team had already collected 5,000 narratives to help them identify what users do and don't like. Using this information, they've continued to change the site and log new requirements in a change request log for analysis and prioritization.

In addition to the narrative research, the team receives a constant stream of feedback from users around the world. This information is gathered via a Knowledge Sharing Champions Network made up of highly active knowledge facilitators/intranet site managers who gather and aggregate the feedback for the intranet team. In addition, an online comment list invites all users to tell the team what they think.

Other ongoing feedback/improvement efforts include:

- "We conduct a minor/content review of the homepage every three months," says Cheuk. "And we plan to undertake a major redesign of the homepage on an annual basis to ensure it is still fit to serve our staff and our business strategy. The next iteration will aim to make the homepage look less like SharePoint and more dynamic."
- The team produces an ongoing report detailing usage stats that highlight areas of low or heavy use. These stats are provided to knowledge sharing facilitators to stimulate discussion on an area's success or failure and to guide further development.

- An online list of change requests tracks the development progress of all such requests. The list is open to all users to read and offer contributions.

URL AND ACCESS

Minerva can be accessed at http://minerva or https://minerva.erm.com. The site is bookmarked in users' browsers and starts up automatically every time users turn on their computers and log on.

The IT team has developed non-VPN access for users to log on to Minerva when they have only an Internet connection. "This is useful for when they are on client sites and cannot access the VPN," says Cheuk.

TECHNOLOGY

Platform

Minerva is built on MOSS 2007. Prior to setting up Minerva, ERM had a pilot project using SharePoint Portal Server 2003. The requirements gathered during the research phase led the team to choose SharePoint 2007 instead of SharePoint 2003, because MOSS has additional collaboration tools and Web 2.0 features that allow user-generated content.

ERM uses MOSS for content management, design, and search on Minerva.

The company chose to use out-of-the-box MOSS functionality as far as possible. "The key customizations that were made were to the *My Profile* areas so that we could capture key information relating to employee expertise," says Cheuk. This customization involved developing five Web parts in addition to those available in the MOSS out-of-the-box *My Profile* feature. The team utilized SharePoint Designer to customize the homepage and to create custom views of data and workflows.

Hardware and Hosting

The Minerva SharePoint farm consists of four Dell servers, two in a highly available SQL server cluster and the other two in a Network Load Balanced (NLB) cluster providing Web front-end services and indexing/search. Access to Minerva via minerva.erm.com is provided by a reverse proxy server running Microsoft ISA Server 2006, again on Dell server hardware.

Site usage is reported on a monthly basis and includes details of the most common searches.

The operating system is Microsoft Windows Server 2003 Enterprise for the SQL cluster and Windows Server 2003 Standard for the Web front-end servers and reverse proxy.

SEARCH

The site uses MOSS 2007 Enterprise edition for search, which comes as part of the MOSS product on which the rest of the site is built. "The current search tool is an out-of-the-box basic search, which on its own is still very useful to users," says Cheuk. "Users can currently search the entire site collection, or specify a specific site in which they want the search to be carried out on."

They can also specify a particular document library or list. And users also have access to a predefined *People Search* where they can search for staff contact details and experience.

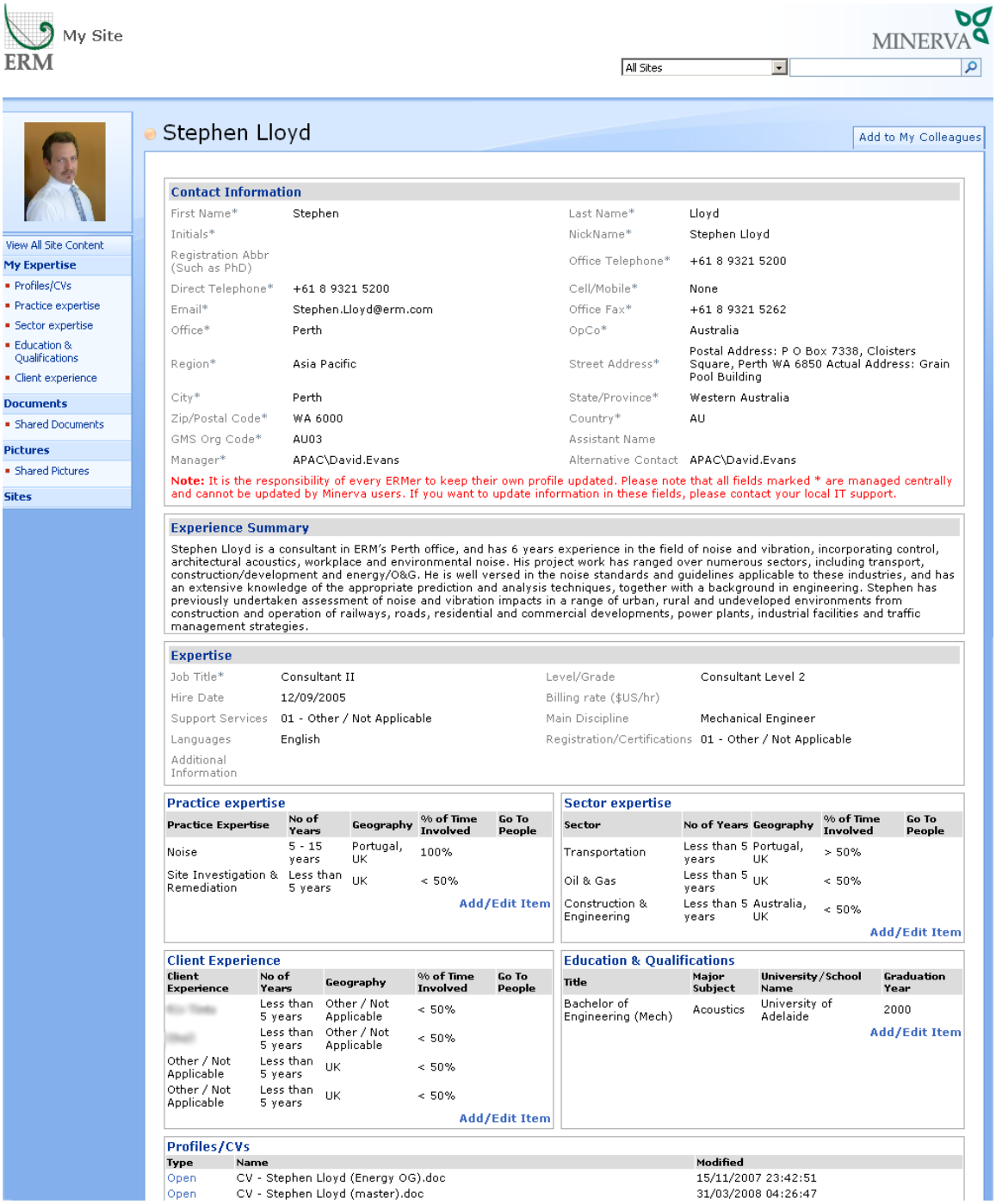
"As a result of talking to our users and getting insight into user behavior, the enhancement of search is our next high priority project in order to enable more advanced search functions," says Cheuk. "This will enable faceted search so that users can search specifically on the predefined metadata properties that they tag to a document upon upload, which will be driven by content types that govern how a document is classified."

"We will also be creating new predefined search scopes to allow users to quickly obtain relevant results whilst stripping out 'noise,'" she says, adding that, for example, they'll create a *CV Search* scope that will search only users' CVs and let them "zip these CVs quickly into a proposal."

People Search

At ERM, *People Search* is a heavily used intranet feature. "This is a vital tool for a consultancy like ours that works out of over 40 different countries across every time zone," says Cheuk.

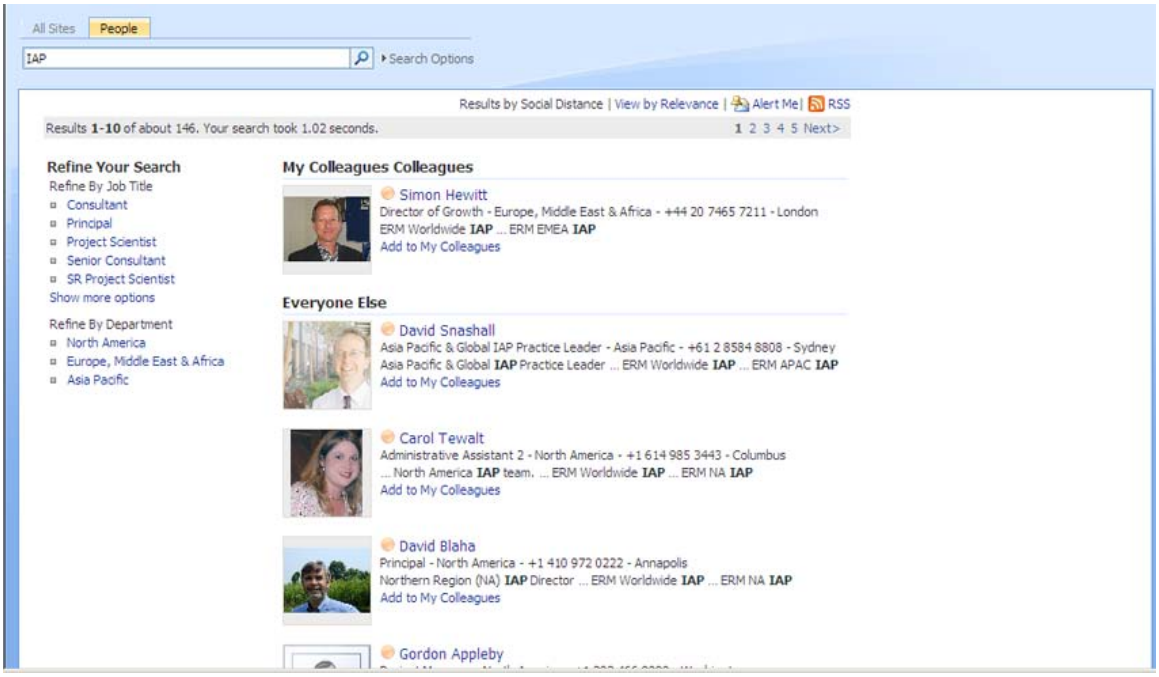
Every user has their own *My Site*, which consists of a profile containing CVs and experience summaries that can be downloaded and added to proposal documents.



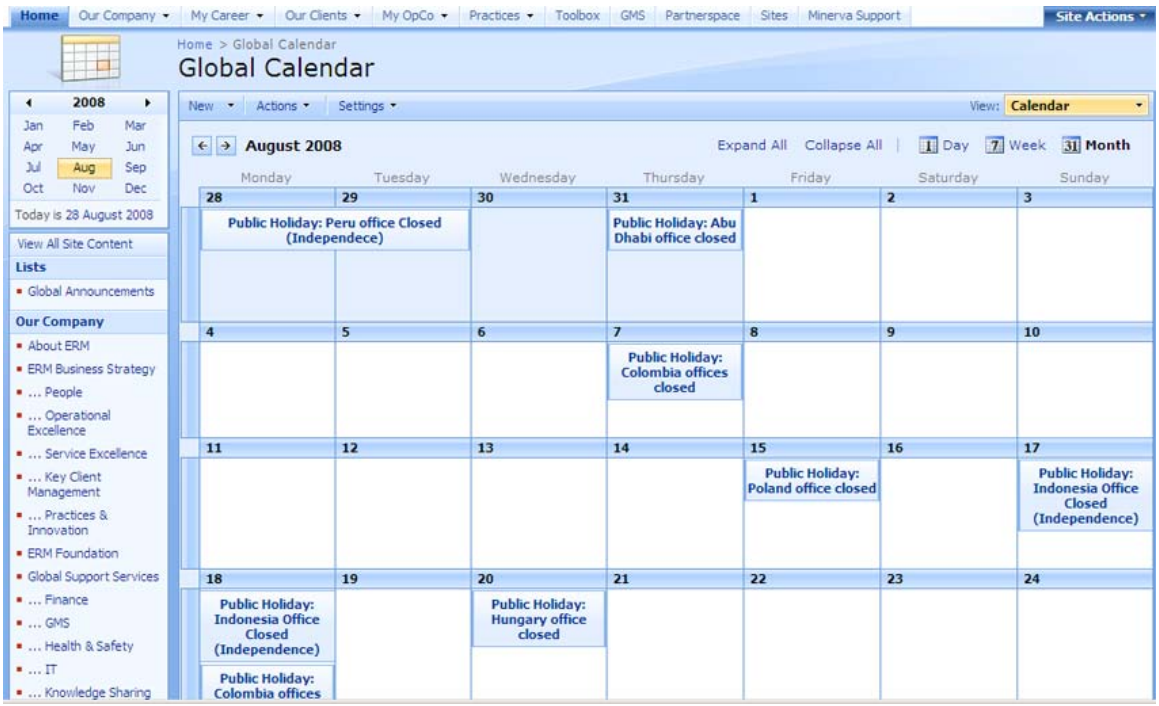
Pictured: A screenshot of a *My Profile Site*. Offering a *People Search* is vital for a consultancy like ERM with 3,500 people working in more than 140 offices in over 40 different countries across every time zone.

Users can sort the *People Search* results by "Social Distance" or "Relevance," which adds an extra layer of information to guide them to relevant results. Further, configuring best bets and keyword synonyms can enhance results. Security features of the various sites are transferred to the search results, so users see only those results that they have permission to access.

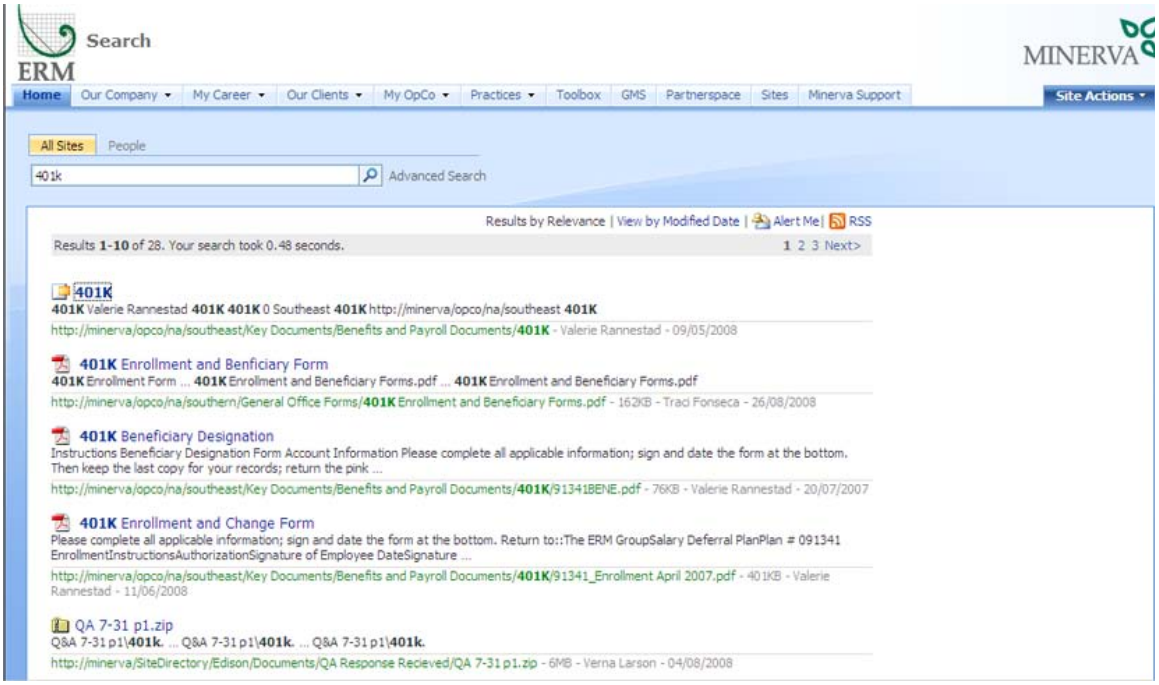
"We are looking to extend our basic search features to rollout a more advanced search interface later this year," says Cheuk, adding that it will let users "conduct specific searches based on our corporate taxonomy instead of just free text searching."



Pictured: Search results for people involved in ERM's unique Impacts Assessment and Planning (IAP) service. IAP focuses on assessing and mitigating the environmental, social, and health impacts of development projects in often challenging and sensitive regions of the world.



Pictured: ERM's *Global Calendar* records all public holidays, office closures, and so on for all of the company's global offices.



Pictured: A standard search results screen for the search term "401k."



Pictured: Search results for press mentions of ERM within the last month. In this case, ERM was mentioned on a BBC World news program. A list of press appearances and mentions is also featured in a regular round-up on the marketing site.

CONTENT MANAGEMENT

Content management is handled by MOSS. As part of the content creation process, users are required to complete pre-defined metadata information before they can upload the documents to MOSS. "These metadata items have been defined using content types at the top level to control the taxonomy," explains Cheuk.

Using Content Types

All content loaded onto Minerva is tagged and assigned to a specific content type. A content type is an object that is stored within SharePoint and defines elements of that content, such as document template, metadata, workflows, and information management policies.

"Using content types allows us to manage our taxonomy from the top level and filter down changes to all sites and libraries that use that content type," says Cheuk. "Each content type has an expiry date, and it is the content type that drives the workflow once the expiry date has been reached. At this stage, the workflow will assign a task to the content owner who then makes the call as to whether the content needs to be updated or deleted from the portal."

Another feature of assigning content types is that they can push and pull content from one site to another without creating duplicate copies.

The metadata assigned also allows users to create "views" so that only information relevant to them will be shown. This means that documents are not hidden away in folders, so users don't need to know the folder hierarchy to find the documents as they can appear in multiple views.

Content Expiration

Eventually, the team will also use this metadata to drive document retention and review/disposal of expired content. Every document by default has an expiry date of two years. "We are developing a custom workflow that will manage the expired content and route it to the document owner for disposition approval," she says.

Distributed Ownership

The Minerva team is small, so effective management requires a distributed ownership model. A new site is requested through a site request process. Then, each site within the portal is assigned an owner and a site manager.

Owners are responsible for the target business area and for providing direction and resources to support the site. Day-to-day management resides with site managers, under the lead of site owners. Site managers handle the content, design, and overall management of the site. This is especially true for local sites where the content must be pertinent to the region and not centrally controlled.

For practice area sites, subject matter experts (SMEs) manage the site content, and the design supports the practice's specific needs.

Individuals manage their own *My Site*/*My Profile* pages; this arrangement works well at ERM.

Working with Templates

The team has developed six base site templates—Corporate, OpCo, Practice/Sector, Client, Project, Event—and users can request a site be set up on any one of them.

Site managers are provided with a basic template, and the Minerva team offers training to give them the skills to customize the site to suit their needs. Guidelines and standards for the sites reside on the team's *Learning Zone* wiki.

Enforcing the standards has been relatively easy for the team. All site requests are managed by the core Minerva Team and a few "super users," and all sites use the base templates. "Templates are issued as a guide to help the site manager design their site with critical content in mind," says Cheuk. "The most challenging aspect on devolving the responsibility of site design to site managers globally is ensuring that sites are still user friendly and have appropriate content on them."

All sites are reviewed every six months, and practice site managers have one-to-one sessions with a member of the KSC team. "All site managers are invited to a fortnightly advanced ('therapy') training session where ideas are discussed and advanced features previewed," she says.

MOBILE

Minerva does not currently support mobile access. "There is demand for mobile access," says Cheuk. "This is on a change request list, which we plan to address in the coming year."

FEATURES

Dervin's Sense-Making Methodology informed many of Minerva's features, including:

My Site. All employees have a personal site containing contact information, details of expertise, photos, and CVs. All employees can also set up a personal blog if they want to express their personal views.

The company doesn't actively police any of these open forums. Instead, they rely on "peer review" to highlight any inappropriateness. "To date, we haven't had any issues with any of the open forums and no action has had to be taken to remove a posting or discipline staff," says Cheuk. "We have a blogging policy that underlines the need to respect both legal and ethical standards."

Integration with instant messaging. By clicking on any contact name on the intranet, an employee can initiate an online conversation with that colleague via IM. ERMers use this throughout the workday, and it has become part of the corporate culture.

Operating company (OpCo) sites. Each of the 40 operating companies has a portal on Minerva with detailed company information and a listing of key contacts in each office.

Communities of Practice (CoP) site. Each global practitioner's network has a portal area for practitioners to share news and resources, and collaborate with one another. Each site is managed by a business sponsor and a site facilitator.

Features that Increase Visibility

To support the objective of increasing the visibility of local work, the team implemented two key features.

***Document library*.** The document library lets any ERM employee share local work globally. Once users post work to this section, the content is reviewed and discussed with the appropriate communities of practice, then moved to the CoP site if appropriate.

***Global Announcement* feature on the homepage.** This unmoderated announcement feature lets employees easily share news, introduce new hires, and send out global announcements (replacing global e-mail to all staff).

Collaboration Features

Four features support the objective of making Cross-OpCo collaboration easy.

Online project sites. Any employee can request an online project site to enable collaboration on client projects with colleagues from other offices. Employees use these sites to share news, manage project documentation, assign tasks, and discuss business issues.

ERM Wiki Wiki. The ERM Wiki Wiki is designed to enable employees to be involved in collaborative writing. No approval is required to set up a wiki. Employees use it to set agendas and finalize project documents.

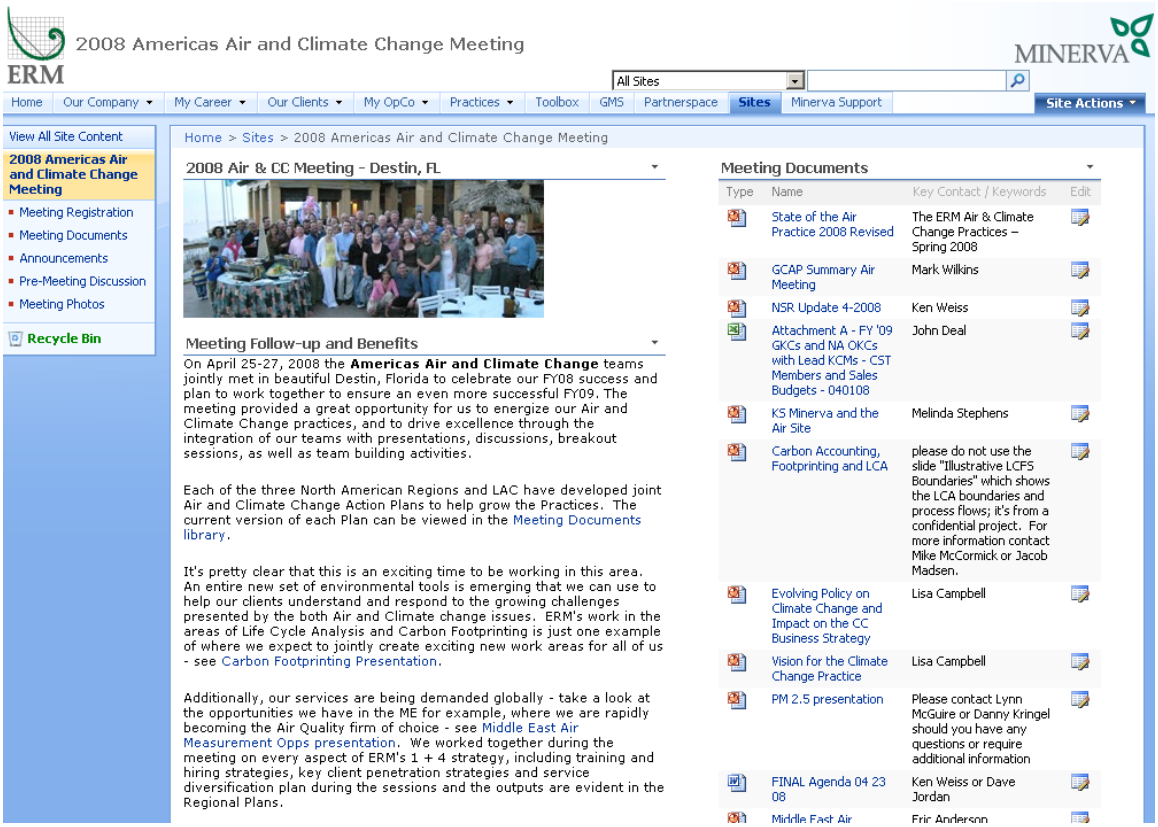
The CEO blog. The CEO blog has a prominent link on the homepage. Through this blog, the CEO can interact directly with staff at all levels. Comments and posts are unmoderated and are visible immediately.

Urgent Requests. When consultants are trying to resolve highly complex environmental issues, they often need to utilize expertise from ERM offices other than their own. The *Urgent Requests* feature lets any employee submit an urgent request and expect responses within 24 hours. This feature is highlighted in the most prominent area on the homepage.

Global Information Features

To support the objective of providing quick and easy access to global information, Minerva offers the following features:

- Minerva's **homepage** launches when any employee's computer is switched on.
- An **ERM *Global Calendar*** features all major events happening in different parts of the world. The three latest events are displayed dynamically on the intranet homepage.
- All new employees can complete a **new hire exercise** online to learn about Minerva and its features.
- Minerva features **access to the Global Financial Management System** so that partners, project managers, and staff can get real-time information about utilization rate to aid resource planning and business decisions.



Pictured: Event sites help global teams prepare for events and provide a place for follow-up after an event. The sites offer attendee registration, attendance requirements (such as hotel booking and airport transfers), pre-reading, pre-meeting discussions, post-meeting outcomes and actions documents, meeting photos, and post-meeting task lists.

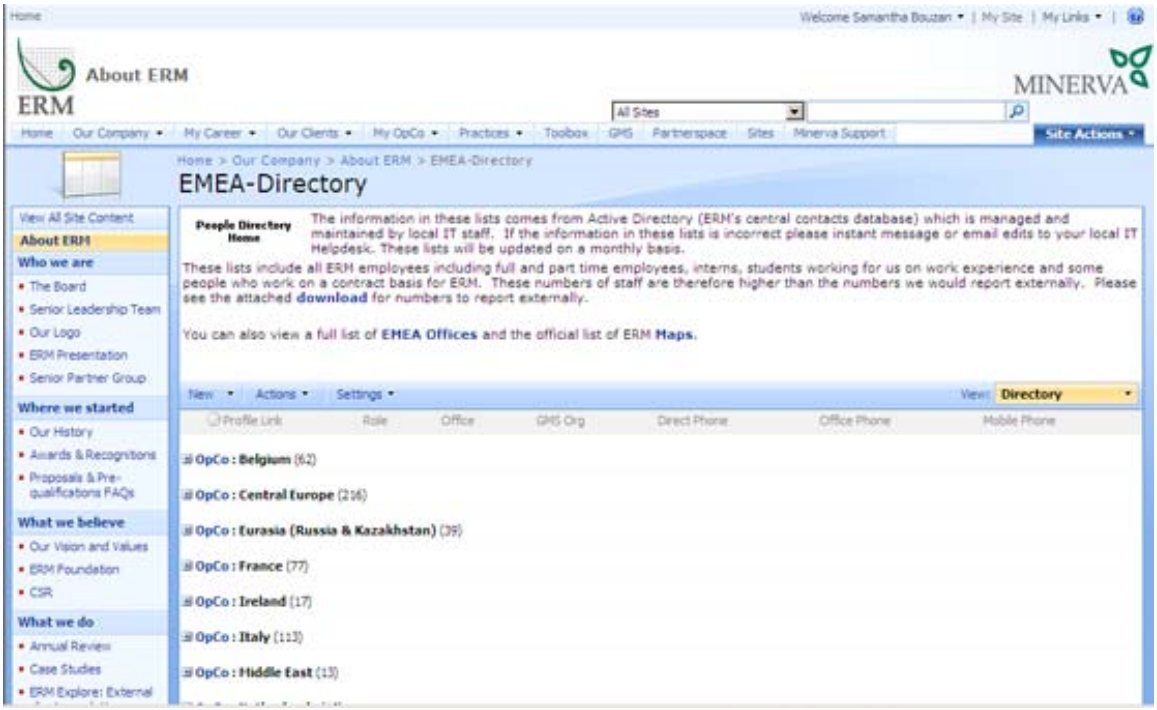
Features to Support Mission-Critical Tasks

- ***Urgent Requests*** enable anyone within the company to immediately post a request seeking expertise, knowledge, or anything else they need at very short notice. This area isn't regulated and, during Minerva's first year of operations, hasn't been misused once. Global e-mail use has reduced 99%; when employees do send a global e-mail, the team takes it as an opportunity to educate them about this feature.

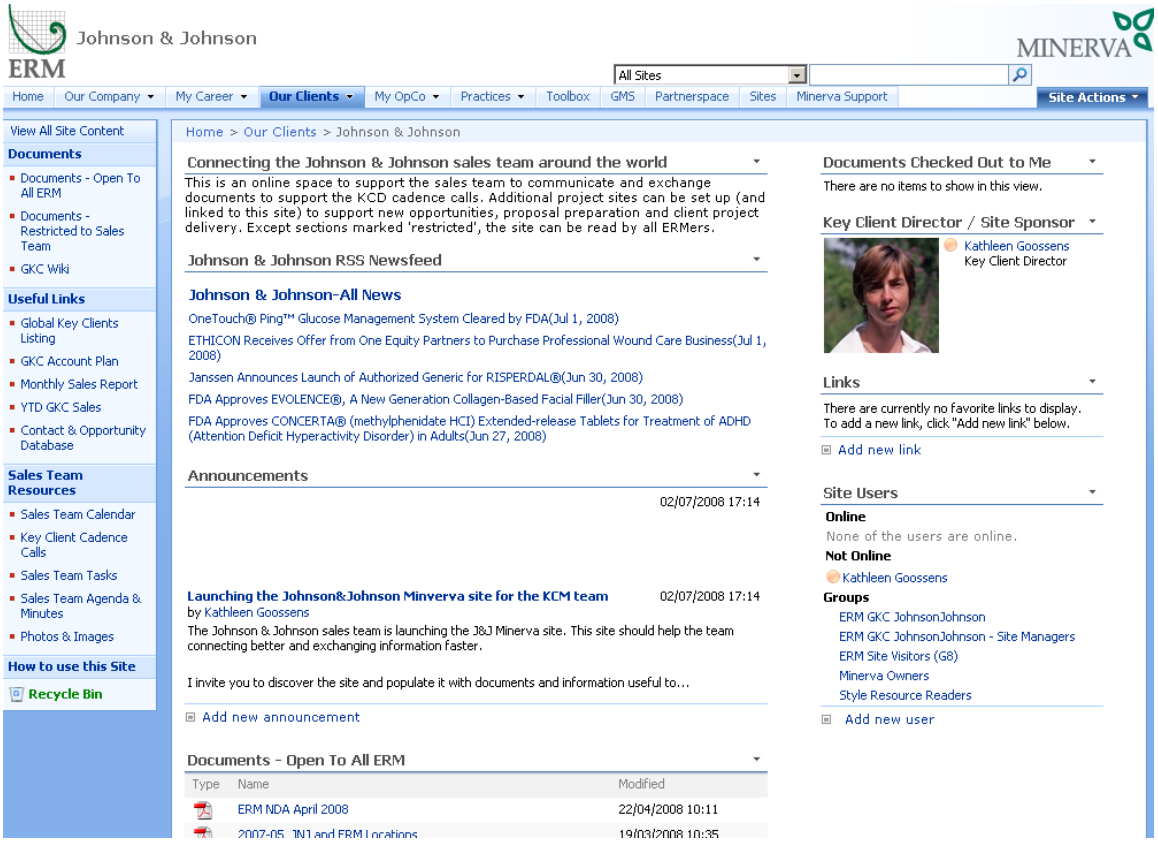
- **Project sites** let project managers scope out a project using a task list; assign and define roles for team members with a who's who list; announce any updates and client communication; save any e-mails from team members or clients to a library; and create, edit and track versions of any documentation required. The project site template also includes a calendar, a discussion forum, and a wiki.

- **The Global Financial Management System (GMS)** offers personalized views for logged-on Minerva users, displaying utilization and billability information that is most relevant to the user.

- **The people directory and profiles** include everyone at ERM—from the most junior intern to the CEO. Every employee has a Facebook-type contact and skills profile on their *My Site*, as well as an optional personal blog. *My Sites* are a standard SharePoint feature that the team customized to align with the company's needs, providing skill sets and information relevant to proposals and project work. The site lets employees add their practice and sector area experience; update their CVs; and provide an experience summary that can be cut and pasted directly into proposals for work that requires qualification detail. *My Sites* profiles are editable only by a profile's owner. The team strongly encourages all employees to fill in and update their profiles, but it's not required. As says Cheuk notes, the feature is similar to Facebook in that, "if you want to be in touch and be in line for great opportunities, you will keep your profile looking great and up-to-date so that you will come up in search results and look like a good candidate for exciting project work."



Pictured: ERM's *People Directory*. Everyone in the company who has created a profile is included in the list, which is sorted geographically and is searchable. All entries list the person's job title and links to their profile.



Pictured: Client intelligence sites offer a single area where consultants can learn about how ERM is serving its global clients. As such, it lets ERM provide a consistently high quality service to these clients, regardless of the geography.

Support Features

User support on Minerva is not merely to solve immediate problems but rather to provide a continuous feedback mechanism so that the site can be improved in an ongoing basis.

According to Cheuk, the support efforts are considered critical as they let the team collect intelligence and understand Minerva's strengths and weaknesses; they also drive continuous improvement.

Support comes in two types on Minerva: the *Minerva Support Site*, which offers a fully integrated support function, and a help desk.

The support site hosts all key contact information, training materials, and intranet policies related to Minerva use.

The help desk function has been recognized as a best practice in using the intranet. It has several key features:

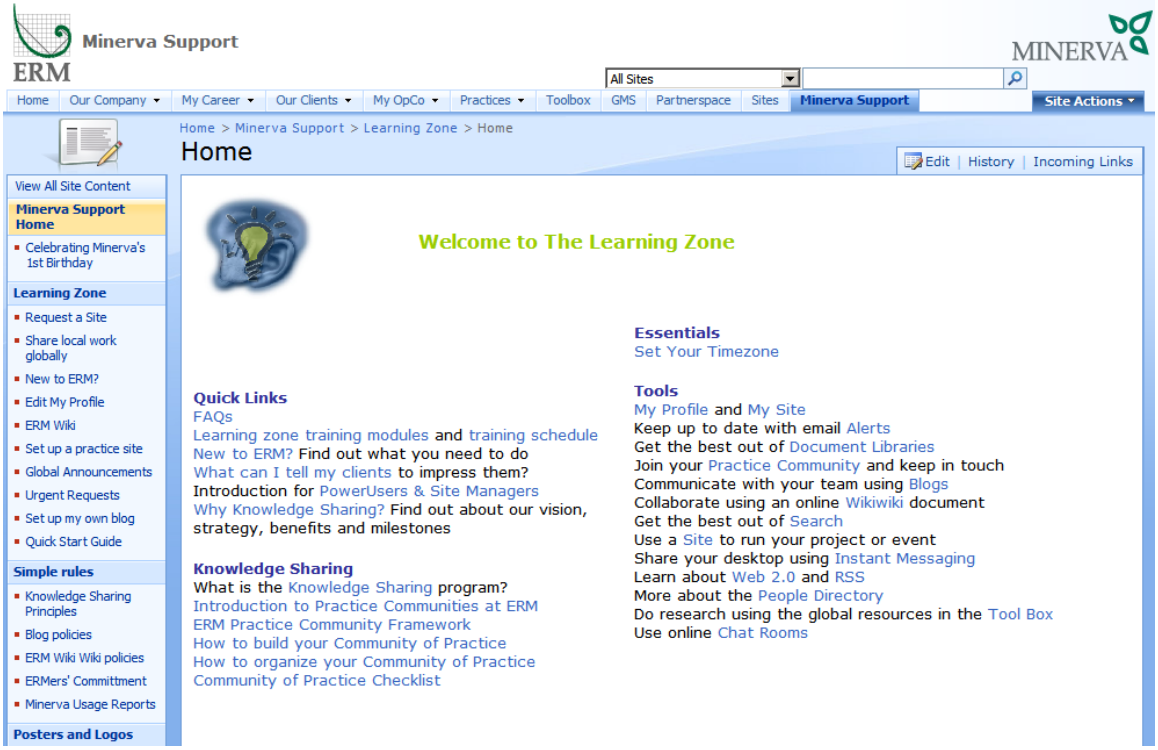
- It enables any user to submit a question for help or suggestion for improvement on the support site.
- The support team receives an alert when there is a new request.
- The requests are assigned to an appropriate team member who is notified by e-mail to take action.

- After the request is closed, a team member updates the case history, documents how the problem has been resolved, and changes the status of the request from "open" to "closed."
- An e-mail is generated to capture feedback from users.
- A report is generated to enable the team to capture the number of requests received, logged, and closed on a monthly basis.
- All issues that cannot be dealt with are logged as a "change request" to be reviewed and prioritised on a quarterly basis.

Supporting New Hires

Designers created a Minerva page specifically for incorporation into new hire induction around the world. The page consists of 12 topics, and includes questions and surveys.

The site also has a *Learning Zone*, which was developed based on user feedback to provide the answers to many of the questions people have about Minerva. The team developed *Learning Zone* using a wiki feature so that all Minerva team members can contribute and edit the instructions as required.



Pictured: The *Learning Zone* provides answers to questions people have about Minerva. The team developed it using wiki features to allow all Minerva team members to contribute and edit the instructions as necessary.

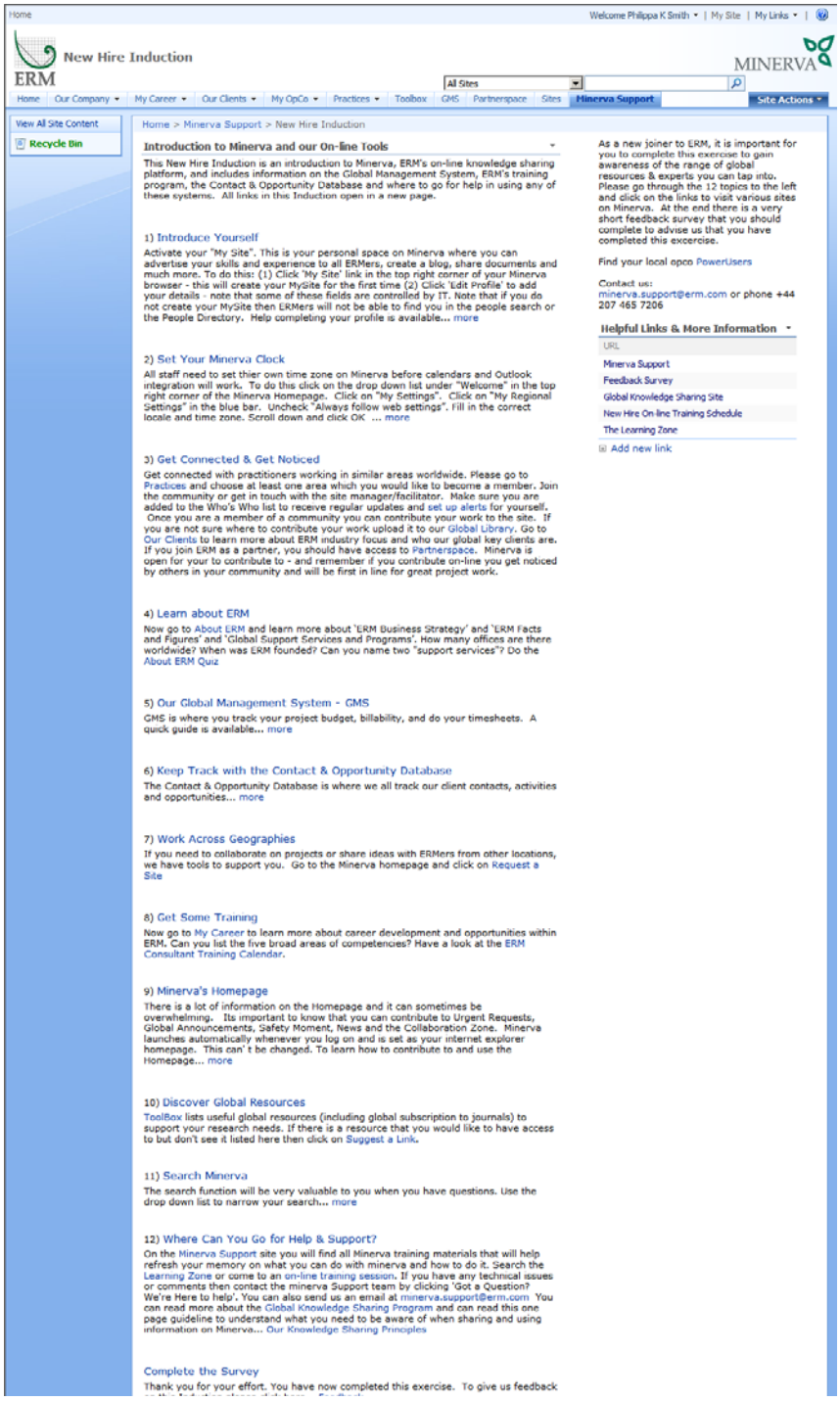
Minerva in Action

The following are examples of Minerva in action. They highlight how the site has been used to engage the staff and enhance the business.

- In July 2008, ERM's people director used a blog and online discussion forum to run a 72-hour marathon dialogue. The dialogue engaged with staff

worldwide, asking them to share their positive and negative views on working for ERM. Their input was used to shape ERM's people strategy.

- Senior partners jointly established an agenda for a two-day strategy meeting using a wiki page. Altogether, 47 partners from more than 40 countries were involved in setting the agenda and contributing their thoughts. Most partners were unfamiliar with Web 2.0, but they found the wiki extremely easy to use once they were shown examples of how others are using it in a business context.
- Minerva videos were launched in May 2007 along with the intranet's introduction. Two video clips on the homepage provided an introduction from the CEO and the global head of information and knowledge. The CEO used the video to officially launch his blog.
- The CEO's blog was launched in May 2007, enabling all employees to have direct conversations with the CEO. No anonymous posting is allowed, and all comments are visible to all users. The team has received positive feedback from consultants who reported that the blog has demonstrated real transparency and helped break down the organization's hierarchical structure.
- In July 2007, ERM launched a campaign to look at how the organization should address climate change. The Minerva team designed a section on the homepage that included a video clip, a blog post from an ERM climate change expert, and a poll to enable all staff to comment and have a genuine discussion with one another and with the senior leaders.
- To select the front cover of ERM's *Annual Report*, the team featured a homepage poll in June 2007 that let employees vote for their favorite photos taken by employees. The winning photo was featured as the front cover of the *Annual Report*.
- To welcome new hires into ERM and encourage them to learn about the company and its structure, culture, and people, Minerva provides an online e-learning site. The site provides new hires with a 10-step guide that goes through the various parts of the system and helps them to understand its features. At the end of the exercise, they must complete a survey to provide their feedback and comments. Once this feedback is registered, it triggers a workflow to the KS team, which follows up the training with more in-depth training and presents the new hire with a welcome gift.
- To help employees find the most relevant information on the homepage, one section is targeted to the user's own particular country. The information in this section is viewable only by staff from that country. Employees in Central Europe, for example, would be the only employees to see the *Central European management system*.



Pictured: A Minerva site that welcomes new hires into ERM and encourages them to learn about the company and its structure, culture, and people. Minerva's online e-learning site gives new hires a 10-step guide that goes through the various parts of the system and helps them understand its features. At the end of the exercise, the new employees fill in a survey to provide their feedback and comments. Once they save the survey, it triggers a workflow to a team member who then follows up the training with more in-depth training and presents the new employees with a welcome gift.

Collaboration

According to Cheuk, a key aim of the intranet is collaboration. "It [the site] is a tool that has been developed to network people within the company and better equip them to do their jobs, manage projects, and deliver the best possible service to our clients."

Achieving this goal involves the use of wikis, discussion groups, community areas, and knowledge bases with which to build up a collective memory/understanding of recurring problems. Many of these features were discussed in the *Features* section above.

"Each practice either has, is developing, or will develop its own site in addition to project sites being developed and utilized as a regular feature of project work," she says, adding that client intelligence sites show teams the work that's being done, which is "useful information that can help us provide a better service."

In addition to collaboration that helps users do their jobs better and easier, other types of collaboration can be just as important for building a sense of community that helps employees feel they are more a part of the organization. On Minerva, those tools include:

***Safety Moment*:** This blog is accessible through a link on the homepage and poses questions and possible answers about a specific topic. It focuses on real-life safety incidents, ranging from near-miss situations at natural gas facilities to tips for driving in bad whether and how to check for insects that bite before embarking on certain tasks. The blog features lessons learned and tips on avoiding the target situation, and encourages comments and discussion.

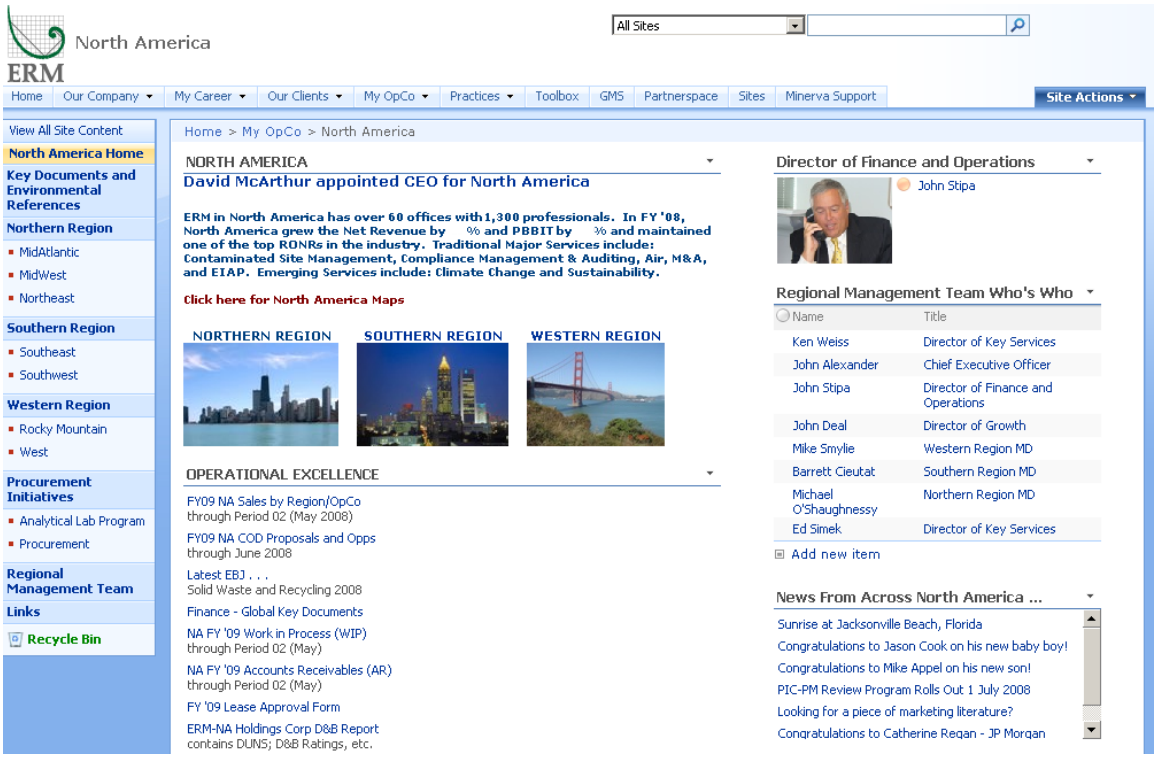
Cheuk says this tool is helping the company build global health and safety awareness, and drives home the company's commitment to providing the highest possible standards of health and safety. This is the site's most successful blog, receiving approximately 2,000 hits every month.

***Urgent Requests*:** This feature lets all employees immediately post requests to ERM's global community to get urgent help on issues requiring particular expertise, knowledge, or experience. Using discussion thread technology, this feature lets employees easily seek advice/input from colleagues.

Although *Urgent Requests* isn't regulated, Cheuk says its been operating for a year and hasn't been misused—not even once. In addition to providing employees with crucial assistance, the feature has reduced global e-mails by 99%.

When a staff member does use worldwide e-mail instead of the *Urgent Request* feature, the team uses it as an opportunity to educate the person about *Urgent Requests*.

OpCo Community: ERM has permanent bases—known as operating companies (OpCos)—in more than 40 different countries. Although many issues are dealt with globally, others require action at a regional level and OpCo communities serve as a central point of contact on which to draw and place this basic information. OpCos include financial, procurement, master service agreements, and reporting information in a clear and easily searchable way. Regional management teams are listed with links to profiles. OpCos also link to informal office sites and display a rollup of their news.



Pictured: The North American operational site's homepage. Operating company (OpCos) sites reflect the geographic and financial reporting structure of the organization. They include financial, procurement, master service agreement, and reporting information in a clear and easily searchable manner. Regional management teams are listed with links to profiles. OpCos link to office sites and also display a rollup of their news.

Knowledge Management

Informed by the Dervin methodology, ERM defines knowledge management as adopting good communications practices, building networks and communities, collaborating, and making global resources visible. Minerva is viewed as ERM's overall knowledge base.

Cheuk explains: "In 2006, ERM's leaders recognized the need to improve the company's global knowledge sharing and collaboration in order to meet a growing demand for both environmental consultancy services and clients' need for more innovative solutions to their problems. ERM also wanted to recruit and retain talented individuals so as to remain competitive. ERM's global knowledge sharing portal, Minerva, was rolled out after a nine-month joint project between the company's IT department and its Global Knowledge Sharing Team. The project ran from September 2006 to 24 May 2007, when Minerva was launched."

Minerva was specifically designed to improve operational excellence and to deliver its knowledge sharing vision. "We want everyone at ERM to be able to quickly tap into one another's expertise, and access relevant information/documents in order to provide the best solution for our clients and to be successful in growing our own careers," says Cheuk.

With about 80% of employees' knowledge stored within their own minds, Cheuk says that ERM recognizes the need for "a system and organization culture which enables

good internal communications and enables ERMers to be easily connected with one another to serve our clients."

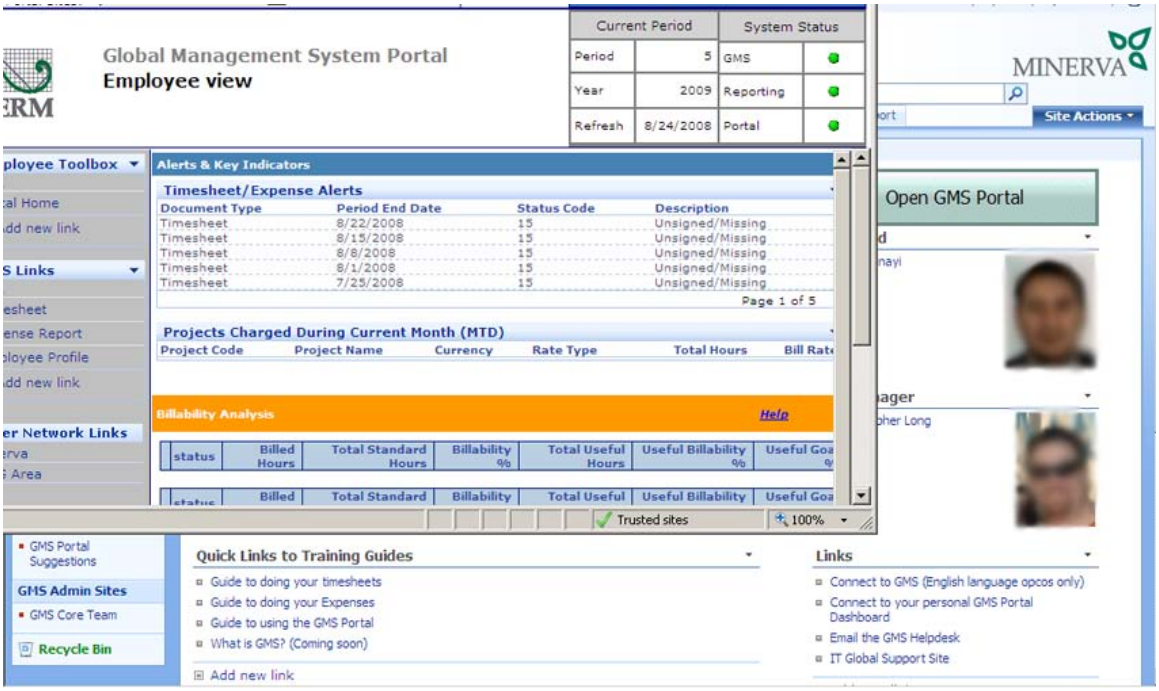
The Minerva team had four of the site's implementation goals printed on a bookmark and distributed them to all ERM staff. The following goals are also illustrated in the cartoon below:

1. To increase the social networking of staff worldwide by linking-up practitioners working in similar areas and to reduce the degree of separation felt by geographically dispersed staff.
2. To leverage on employees' collective knowledge and experience by making resources, tools, methodologies, proposals and documents accessible on a global basis.
3. To improve cross-office collaboration to serve our global clients' needs, including reducing the use of e-mails to support team collaboration.
4. To support internal communications and integrate new hires into the organization by making corporate resources and messages easily accessible.

Data Visualization

Data visualization can be an important tool for conveying information and allowing real-time access to information. ERM created a tool for their Global Management System (GMS). It was introduced to replace a legacy of local systems that were being used around the world. Instead of accessing data through these systems, users now have a single global project and account management system in GMS.

The GMS tool records the company's project work and enables users to pull accounting and billing data. The GMS Portal allows consultants to access real-time project budget and billability information that is directly related to the projects they are involved in. The information changes depending on the latest inputs from the project manager or other team members. It allows consultants a snapshot of what is going on in their projects at any particular time. Users can click on the particular areas to get more detail or to add their own information updates.



Pictured: The Global Management System (GMS) records ERM project work and lets employees pull accounting and billing data. The GMS Portal, accessible through Minerva, lets consultants access real-time project budget and billability information that is directly related to their projects. The information changes depending on the latest inputs from the project manager or other team members. As such, it allows consultants a snapshot of what is going on in their projects at any particular time.

LESSONS LEARNED

Following are some of the lessons learned from the Minerva project.

Bonnie Cheuk, global head of information and knowledge:

- **Planning is critical.** Consult representatives from every part of the business and make sure they contribute to the project. Also, says Cheuk, "information architecture is essential to get right from the start, as it is easier and less costly to make the changes in the planning stages than after implementation. In addition to IA, permission architecture needs to be mapped out, too. Think carefully as to who should have what access to which sites, how this will be applied and managed going forward? Who will control it? Will it be the responsibility of site managers or IT?"
- **Training is essential.** "Look out for those in your organization who are keen and able to get involved. Training needs to be sustainable throughout and they need to understand just how much time and effort will be required from them in being trained."
- **Users must feel a sense of ownership and be inspired to use it.** "Once people start to see the benefits of using it, they will be more likely to come on board, creating a snowball effect in gathering momentum and adding to the number of people both contributing and using it. However, you also need to be able to manage this response in order to prevent a Wild West approach of sites springing up all over the place with little if any guidance and support.

Governance is key to ensure that all sites have an owner and that content is kept up to date. Don't be afraid to close sites. Remember that everything has a lifecycle and communities both rise and fall."

- **Buy-in from senior leaders—leadership 2.0—is vital.** "Without commitment and/or support from the highest levels, others will not be encouraged to see the benefit."
- **Know the limitations of the tools.** "Early adopters of the technology had limited knowledge and understanding of it so that when unexpected bugs occurred there was confusion as to what to do with it, and this put some users off. A lot of time was spent researching and implementing workarounds in addition to educating users about these potential 'glitches.'"

RESULTS / ROI

Connected people is one of the biggest wins for the ERM intranet. "ERM employees have a culture of friendliness and willingness to help one another," says Cheuk, adding that a major problem in the past was that staff members simply didn't know when other employees had problems, and thus couldn't offer help or advice.

With the launch of Minerva, colleagues are much more connected and can readily offer help and advice to one another.

Real World Results

The best way to illustrate the positive effects of deploying an intranet portal such as Minerva is to hear how its features and functionalities have affected the day-to-day work of end users. ERM staff share a few of their experiences with Minerva:

Leveraging ERM's Global Green Building Knowledge

Graham Lane, OpCo head, Japan: "Very recently, I was on the road when a client called me for urgent advice on green buildings. I called my PA to have a look at what was available on Minerva relating to green buildings. Without me having to return to the office, she found information on an excellent page on the *Climate Change* portal, which listed all people who were responsible for green buildings, posted only a week before. That was superb. She was able to e-mail me some PowerPoint slides and a discussion thread. It was easy to find out what was going on and where we were as a company. It provided me with a really good snapshot, with the real benefit that it was totally hot-off-the-press—it was less than a week old, and Minerva gave me instant access to it. Actually, as it turned out, Peter Rawlings' name was listed on the site. I was able to get onto the phone to him this morning to follow up on those ideas and we've come up with a fantastic strategy and hopefully it generates a positive outcome."

Delivering the best solution for our clients using our global network

Steve Chang, partner, Taiwan: "About one month ago, we won a project from the central Environmental Protection Agency (EPA). The project's called DNAPL—a heavy contaminant, we're thinking. We had to give a presentation to the EPA because they have a review and evaluation committee to select the consultant. We showed them Minerva … because the project is for the DNAPL remedial technologies guidelines, we had to prepare that kind of remediation guideline for EPA. EPA will then give that guideline to the local Environment Protection Bureau, and give it to some of the

clients. So that's very important for the consultant to know lots of the information of other countries. We seek advice from the global SIR [Site Investigation and Remediation] network and got some useful responses.

"We also showed our client the SIR portal on Minerva and explained how easy it is to access and gather information from all over the world and get different kinds of remedial technology. It's easy to get this from Minerva, so we introduced that to the EPA. This is the first time we incorporated Minerva into our sales strategy. And it works."

Giving our best expertise and knowledge to our clients

Marco Gallego and Paula Gonzalez, Spain and Portugal (Aug. 2007): "In July, we were asked by an OpCo key client to develop a study on the impact of climate change on biodiversity in Portugal. The project would involve modeling the effects on biodiversity of the foreseen effects of climate change and assessing the economic value of the services ecosystems lost or reduced.

"We posted a question on *Urgent Requests* to seek expert advice. Within a couple of days, we received information about related projects in UK, Australia, the Mid-Atlantic region of the US, and Germany. We actually included some ERMers from UK in the proposal that went to the client.

"Douglas from the China OpCo was at that time speaking with a local client on a similar issue. He also posted a note on *Urgent Requests* and asked Marco and Paula to send him all the information so he could be prepared for the meeting with the potential clients."

Leadership 2.0

Projects often hinge on getting the buy-in of senior managers. As important as it is for end users to buy into a system, they often look to senior leaders and follow their lead. If senior managers use and rely on the intranet, it encourages the rank and file to do so as well. Cheuk wanted to make sure that the managers understood this imperative prior to launching the new site.

So, before Minerva's launch, Cheuk conducted a workshop with the top senior managers. The focus was not merely to train them to use Minerva, but also to discuss the new leadership required to encourage a true embrace of the intranet.

During the workshop, Cheuk offered them two options: (a) you are in it, or (b) you are still in it. The point she was trying to make was that the leaders had to be committed to supporting Minerva and its range of Web 2.0 features. They could not delegate the need for change. That is, they had to change themselves and—most importantly—lead by example and use the tool themselves.

Cheuk shares some of the highlights of the leadership workshop:

Be prepared for the consequences. "Allowing employees to share and communicate openly online comes with its pros and cons, and leaders/managers really need to be prepared for the consequences. On the one hand, it can allow new ideas and lead to innovation. On the other hand, it will surface diverse views, dissent, and challenges—and challenge people in power. Many organizations out there are struggling with the latter and have decided to 'suppress' and/or 'manage' these diverse views and have failed to implement Web 2.0."

Embrace Web 2.0. Cheuk says that to embrace Web 2.0, the organization has to open up communications and promote the following ways of working:

- New ideas/input
- Praise/support
- Innovation
- Engagement
- Dialogue
- Clarification
- Deeper understanding
- New learning
- Multiple perspectives

Be prepared for the challenges. "The organization has to be aware of the challenges that come from an open and transparent communication culture." Cheuk says that keywords that describe those challenges include:

- Diversity
- Challenge
- Dissent
- Sub-groups
- Surprise
- Uncertainty
- Emergence
- Inability to plan too much
- Less control

Be prepared for challenging dialogue. "Since the launch of Minerva, ERM has seen some controversial dialogue in the CEO's blog. Some comments were direct and blunt. Others outlined gaps they see which can hinder company's growth. The negative comments could be hard to hear, especially when they are posed in the public intranet space," says Cheuk, adding that when staff members aren't willing to share their views publicly, they're encouraged to e-mail senior managers directly. "This has also resulted in leaders having to face the questions and find ways to make improvement," she says.

Accept the "inconveniences." "ERM leaders truly believe that in order to grow the business to the next phase, we must connect all the 'brains' within the organization, and use them to serve our clients' needs. It may come with some 'inconvenience,' but the leaders truly believe the benefits can outgrow them. Our leaders are still learning. Most importantly, they are willing to learn. They see this as a way to increase competitive advantage and to allow ERM to deliver world-class solutions to the clients."

Proven Success

According to Cheuk, two months after its launch in May 2007, Minerva had already proven to be a successful global implementation. "All office intranet sites were in full operation," she says. "Staff worldwide has embraced the Web 2.0 features and an increasing number of staff are using the platform to connect with colleagues from other offices to exchange ideas, resources, and advice."

Other success measures include:

- ERM's senior leaders said that "Minerva has finally turned our vision into reality."
- The then-CEO Pete Regan described the launch of Minerva as "hitting the Jackpot."
- In October 2007, Minerva was showcased as a special case study in the *Inside Knowledge* magazine.
- In December 2007, ERM won the *Environmental Business Journal* (EBJ) 2007 Award for Organisational Innovation for its Minerva roll-out.
- As Minerva has matured, it has become a business critical platform.
- In August 2008, ERM was notified that Minerva was selected as one of the year's 10 best intranets in Nielsen Norman Group's *Intranet Design Annual* for 2009.
- ERM was shortlisted for Global Most Admirable Knowledge Enterprise (MAKE) and won the Hong Kong MAKE award.

HSBC Bank Brazil

Using the intranet

HSBC Holdings plc serves over 128 million customers worldwide through approximately 10,000 offices located in 84 countries and territories. With assets of US$ 2.5 billion (2008), HSBC is the world's largest company according to *Forbes* (2008) and the most valuable brand in the financial industry according to *The Banker* (2008). HSBC Bank Brazil is an HSBC Group subsidiary. With its headquarters in Curitiba (state of Paraná), HSBC Brazil has 26,530 employees at 2,300 locations in 565 cities across the country.

Headquarters: London (global HQ); Curitiba, PR (Brazil HQ)

Number of employees the intranet supports: 30,000 users; 26,530 employees

Sales: HSBC Brazil has profits of R$1.24 billion (approximately US$ 775 million).

Design team

In-house: approximately 10 people. TerraForum supported all the strategy definition and implementation (IA, layout, content, governance definition, and SEO). Midia Digital provided customized CMS templates.

Members

HSBC Brazil: Juliana Marques, internal communications director; Luciano Miranda, intranet manager; Daniel Machado, head of IT; Demerson Comin, manager; Denise Shibata, intranet IA and design coordinator; Fernanda Santos, intranet content coordinator; Edilson Fontenele, IT project manager responsible for the intranet implementation in IT; Luiz Prohmann, IT manager; Maura Kuniyoshi, IT analyst; Luiz Zimmermann, IT analyst; Gustavo Nadaline, IT analyst; Gilmar B. Soares, IT analyst; Clesio Ramos, IT Coordinator; Daniel Machado, head of IT e-channels; Luis Bresolin, IT Analyst; Luiz Suckow, relationship manager technical services.

TerraForum: José Claudio Terra, CEO; Carlos Franco, partner; Paulo Floriano, project manager; Ricardo Schoueri, partner; Marcelo Barbosa, IA specialist; Denise Pithan, taxonomy and usability specialist; Alício del Nero, IA specialist; Grácia Anacleto content management and Web writing specialist; Suzana Ribeiro, content management and Web writing specialist; Alex Sanghikian, Web writing specialist; Giorgio Dal Molin, Web writing specialist; Stella Wilderom, Web writing specialist; Priscilla Fogiato, Web writing specialist; David Kato collaboration specialist; Eric Boldrin, collaboration specialist; Julio Bittencourt, designer; Vivian Pereira designer; Thiago Padula, designer; Lilian Nosralla, designer; Rodrigo Domingues, IT specialist.

Midia Digital: Carlos Eduardo de Souza, HTML developer; Felipe Gomide, IT manager; Gustavo Straube, Java developer; Lucas Rafael de Almeida, IT analyst; Tiane Yumi Yamaguchi, IT analyst.

SUMMARY

The HBSC Brazil intranet supports approximately 26,000 employees in Brazil. Given that they're all local, this might not seem like much of a challenge, but the users are located in 565 cities across Brazil, so communication is key. And the HSBC Brazil intranet is a showpiece for communication.

The homepage is full of features that can help employees keep on top of the news and perform their everyday work tasks. The left-most column is about informing people, with important recent news appearing in the upper left area of the column.

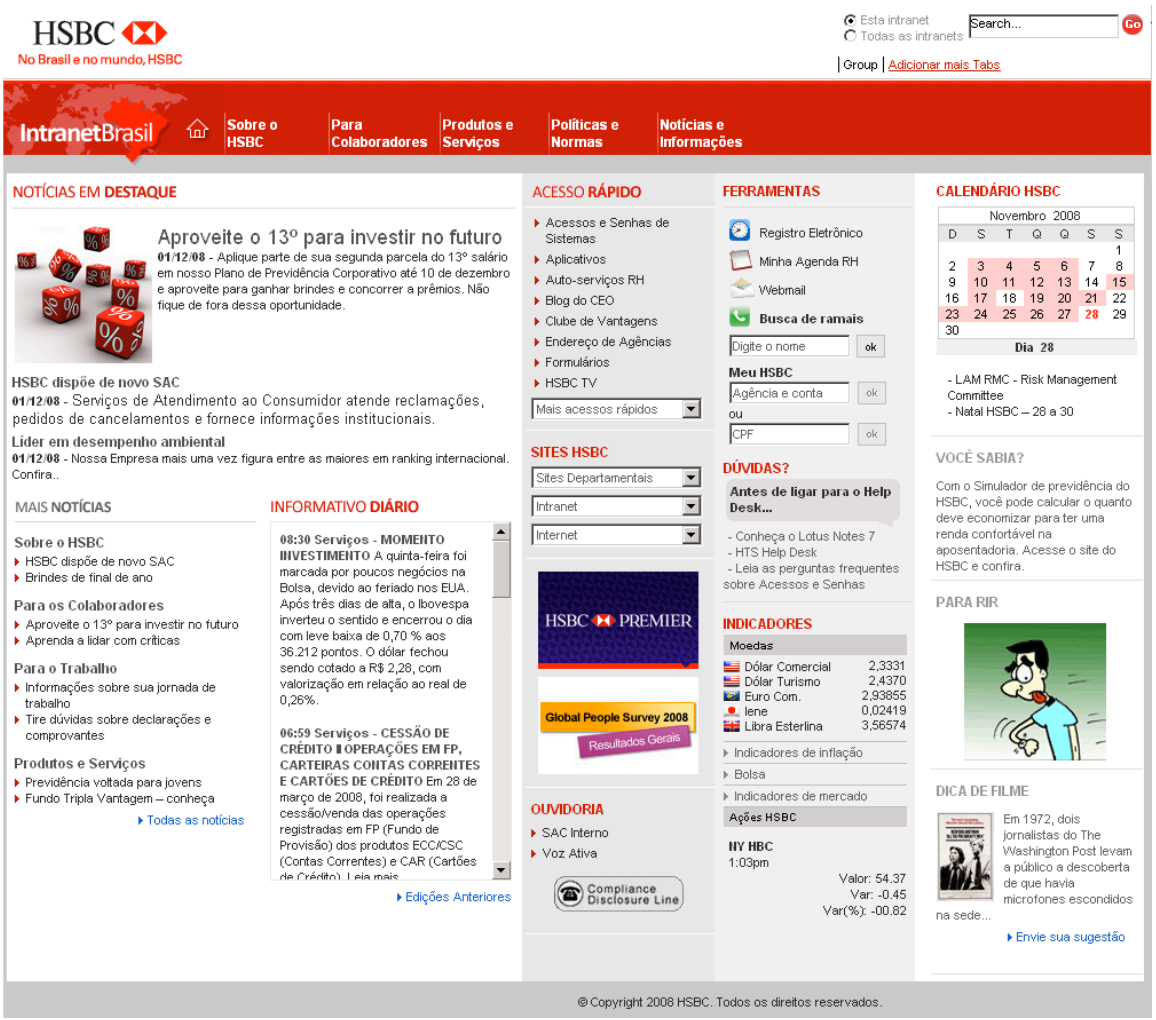
The second column is about important tools at the organization. The *Quick Access* (*Acesso Rápido* in Portuguese) in the middle of the homepage lists popular links. The *Index* (*Indicadores*) section shows the value of various currencies by country.

The third column houses information that is more personal to the individual user. The *Tools* (*Ferramentas*) section lets people tackle various personal tasks, such as view their time-off schedule or calendar and work with Webmail. Users are also offered a poll or a quiz on the homepage (*Eleição PPR - Participe!*). The first line, *Your vote is very important* (Seu voto é muito importante), encourages participation.

The right-most column of the homepage balances with the left-most column, also offering news—but this area's information is less urgent in nature. The corporate calendar appears in the upper right part of the page. There, users can click through

to see events and holidays that are important for the organization. The *Did you know?* (*Você sabia?*) section offers helpful tips about using the intranet, along with tips about products, employee perks, and facts about the organization. For example, the current blurb featured on the homepage tells people to look in the *Noticias e Infromacoes* section for useful online services. Underneath this, for comic relief, a *Peanuts* cartoon gives the thought of the day (in one, Sally talks to Charlie Brown about whether she looks okay to get her picture taken with Santa Claus).

Other information in this section might include: "Did you know that HSBC is the most valuable brand in the world?" or "Did you know that employees have special fees on car insurance?"



Pictured: The homepage of the HSBC Brazil intranet gets users started right away, offering news and links to various tools and calendars.

COMMUNICATION

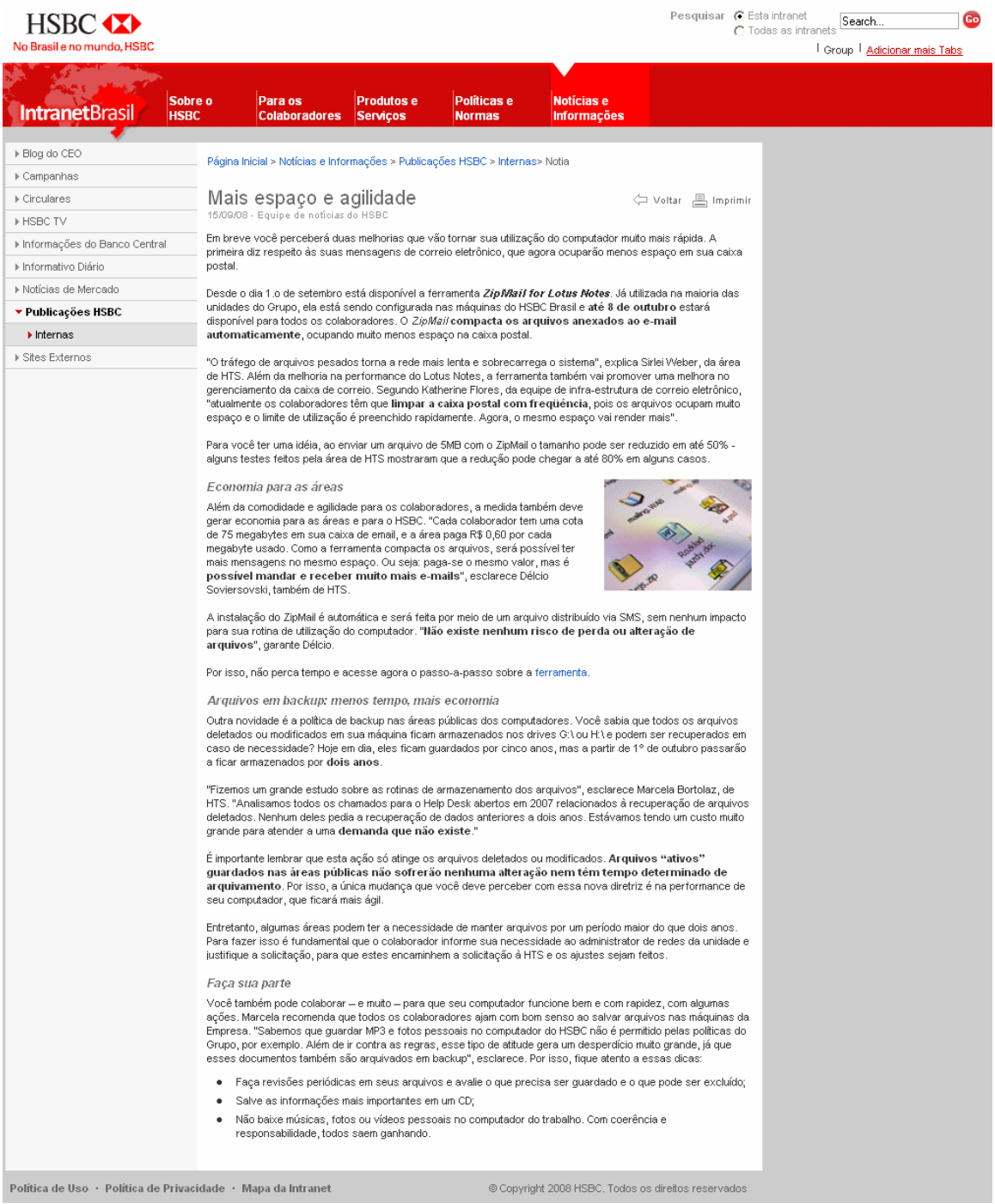
The *News and Information* menu (*Notícias e Informações*) leads to many features that keep employees abreast of recent happenings. This is a great communication area on the HSBC Brazil intranet, offering links to the following features in the left-side navigation:

10 Best Intranets: HSBC Bank Brazil

- The CEO blog
- Campaigns
- Circulars
- News clippings
- HSBC TV
- Information from the Central Bank
- Daily information
- Financial market news
- HSBC publications
- External sites

Each day, at least three new articles are published in the site's news area, covering the day-to-day happenings at HSBC Brazil. To garner new stories, the eight team members who manage this section talk to employees, collecting their opinions, cases, and stories.

Items in the news section on the HSBC Brazil intranet are sorted and categorized using themes similar to those in the main navigation, including *About HSBC* (institutional news), *To Employees* (HR News), *To Work* (administrative news), and *Products and Services* (financial products and market news). Employees can choose from these to view news of interest.



Pictured: A news item, *More Space and Flexibility* (*Mais Espaco e Agilidade*), from the *Internal Publications* section. Users can choose categories and types of news sources.

Additionally, HSBC retains a news clipping services to scout out news articles on the Web that might be of interest and helpful to HSBC employees. Users can search for keywords using the open *Search* (*Pesquisar*) field. They can also sort by one of the offered categories, for example: *HSBC Insurance* (*HSBC Seguros*), *HSBC Investments*, and *Contents of the Day* (*Conteúdo do dia*).



Pictured: A news clipping services finds items from all over the Web that might interest or assist HSBC employees.

On a more personal note, the CEO's blog page has a history of success. In 2005, when CEO blogs were not prevalent, then-president Emilson Alonso created a blog to communicate to his employees more effectively and to invite their feedback. The initiative was a success and has been continued by current CEO Shaun Wallis. Since 2005, more than 200 articles and 8,000 comments have been posted, and the page has been viewed more than 2,000,000 times. Today, this feature has 76,000 views per month—not bad for an intranet that supports about 26,000 users.

As for the design, it's simple and traditional. The latest posting takes up the bulk of the page. A nice picture of the CEO appears at the top along with his name, personalizing his comments. Links to past blogs, and a place for people to comment, appear on the right side of the page.

All the employees are welcome to participate (assuming they accept the terms of use). Like most CEO blogs, all comments on HSBC's CEO blog include the poster's name.

The blog entry itself is short and understandable. Notice that the example entry, which appears below, fits entirely above the fold. Keeping the writing short and concise like this is always a good thing, and it increases the chances that people will actually read it. The call to action in Wallis' post is not hidden in a lot of discussion. Rather, the point he makes is succinct and obvious: he's urging employees to participate in a company-satisfaction survey. A loose translation of his message from Portuguese to English appears below:

> *"Todo ano realizamos uma pesquisa com nossos colaboradores para descobrir o que precisa ser melhorado."*
>
> ***"Every year we conduct a survey with our employees to find out what needs to be improved."***

"Ano passado, a pesquisa foi aplicada em 82 países e o Brazil teve um dos maiores indices de participação (97%) e um razoável indice de engajamento (67%)."

"Last year, the research was applied in 82 countries and Brazil had one of the highest rates of participation (97%) and a reasonable level of engagement (67%)."

"Subsequentemente, todas as áreas do HSBC se reuniram, discutiram os resultados e acordaram um plano de ação."

"Thereafter all areas of HSBC met, discussed the results and agreed on a plan of action."

"Espero que todos se lembrem dos resultados, tanto dos bons quanto não tão bons, e que saibam o que aconteceu desde então."

"I hope that everyone remembers the results, both the good and not so good, and they know what has happened since then."

"Houve muitas ações tanto no HSBC como um todo, quanto nas áreas individualmente - todas com o objetivo de fazer de nossa empresa um lugar melhor pare todos nós."

"HSBC itself and all the areas of the bank are invested in actions directed toward making the company a better place."

"A pesquisa deste ano comeca em 15 de julho e eu espero que todos participem."

"This year's research begins on July 15 and I hope that everyone will participate."



terça-feira, 1 de julho de 2008

Solte a Voz

Prezados Colegas

Todo ano realizamos uma pesquisa com nossos colaboradores para descobrir o que é bom em nossa empresa e o que precisa ser melhorado.

Ano passado, a pesquisa foi aplicada em 82 países e o Brasil teve um dos maiores índices de participação (97%) e um razoável índice de engajamento (67%).

Subsequentemente, todas as áreas do HSBC se reuniram, discutiram os resultados e acordaram um plano de ação.

Espero que todos se lembrem dos resultados, tanto dos bons quanto não tão bons, e que saibam o que aconteceu desde então.

Houve muitas ações tanto no HSBC como um todo, quanto nas áreas individualmente - todas com o objetivo de fazer de nossa empresa um lugar melhor para todos nós.

A pesquisa deste ano começa em 15 de julho e eu espero que todos participem.

Comente o artigo

Para comentar o artigo, serão solicitados o nome do usuário e senha que você utiliza para acessar os aplicativos da Intranet.

E-mail: (ex.: mauricio.b.saraiva@hsbc.com.br)

Comentário:

Enviar comentário

Comentários:

Concordo plenamente com os comentários do Sandro e do Leocelio. O banco fala muito em auto-desenvolvimento e que temos

Categorias

- Blog Emilson
- Clientes
- Cultura
- Distribuição
- Gente
- Marca
- Negócios
- Tecnologia e Pr...

Histórico

- jul/08

- Termo de Uso
- Políticas de Uso
- Ajuda

Dúvidas/Sugestões

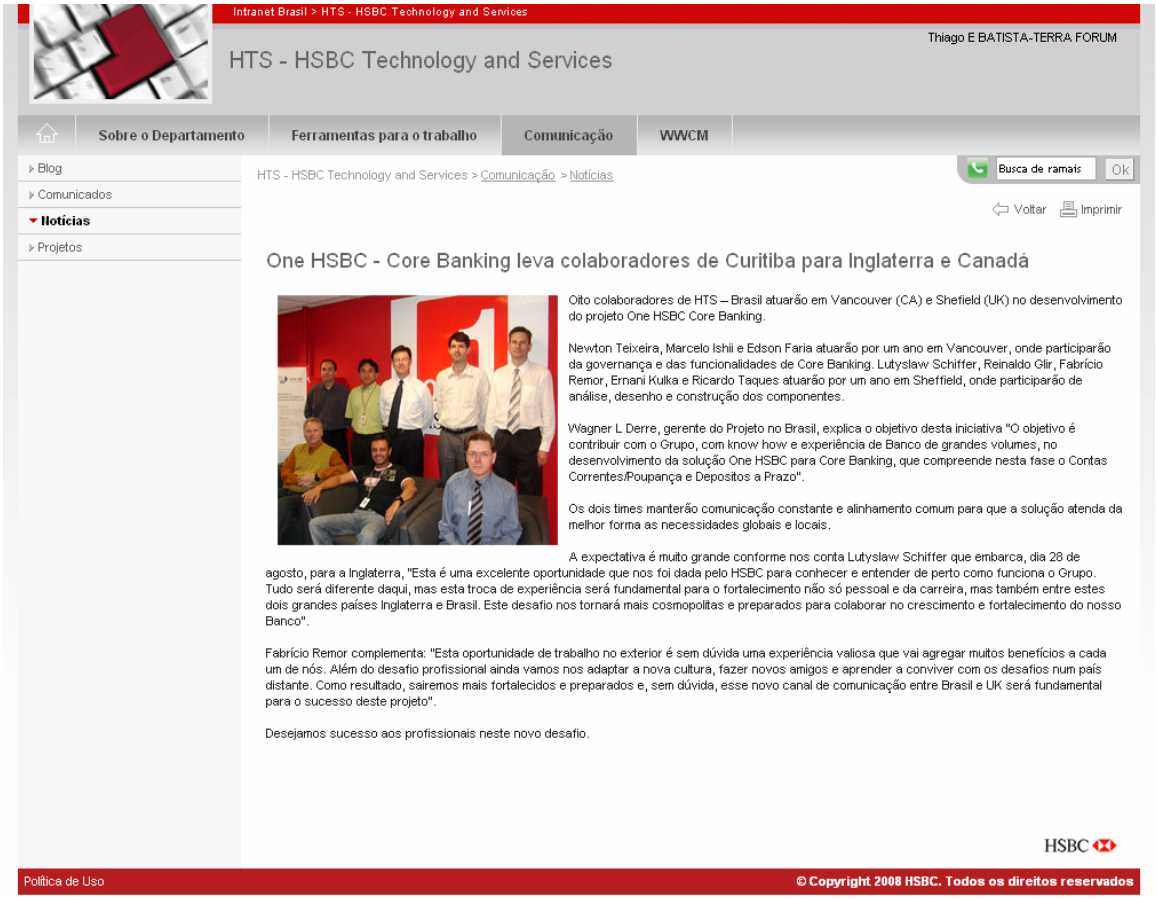
Envie mensagem para a chave: **Endomarketing Brasil**

VOCÊ FAZ O HSBC

Pictured: The CEO's blog page shows the latest posting, a nice picture of the CEO, links to past blogs, and a place for people to comment.

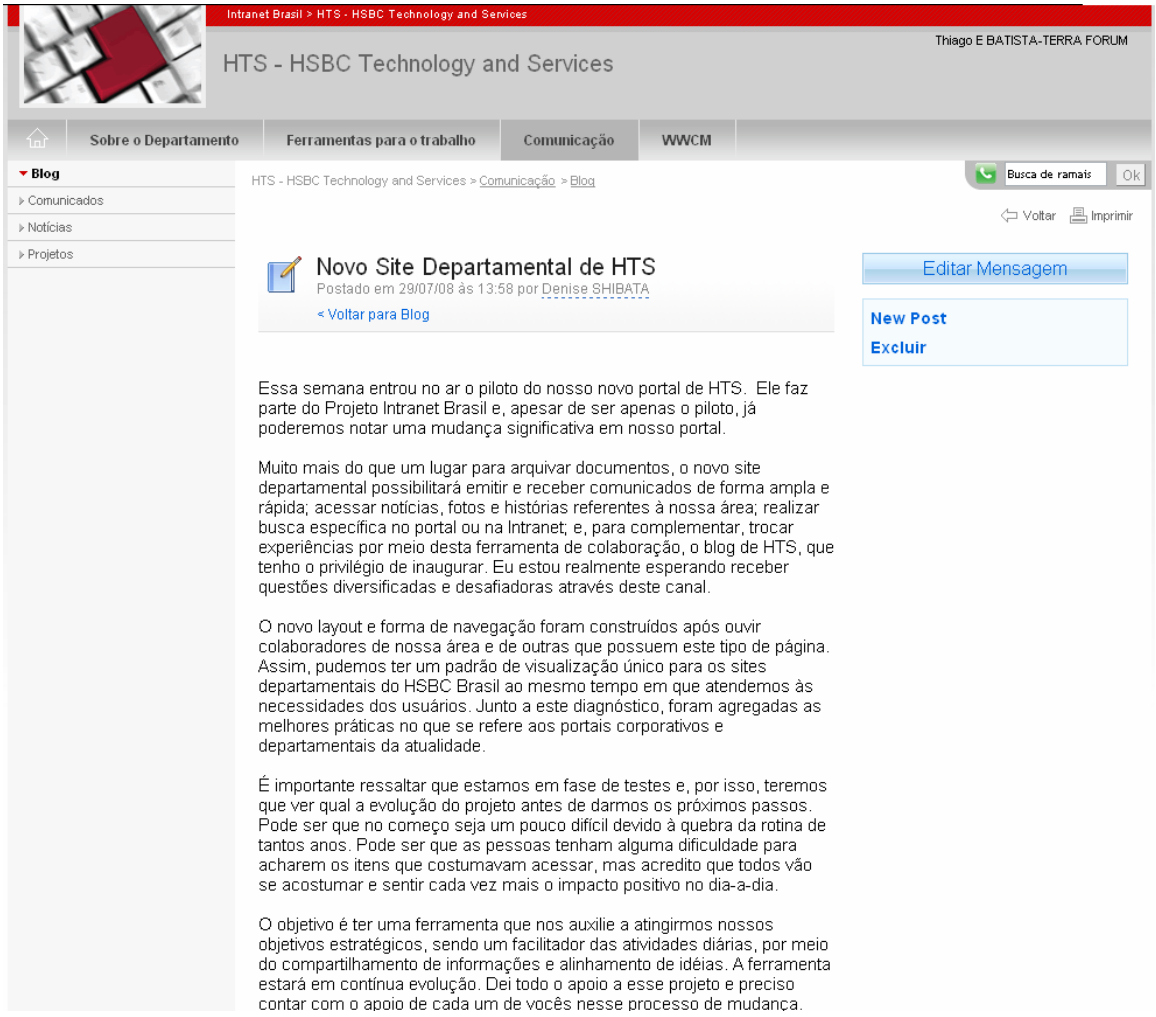
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Another way to share information with peers is through the various departmental sites on the HSBC Brazil intranet.



Pictured: The department page for HTS–HSBC Technology and Services makes information about projects, teams, news, and more available together in the same place.

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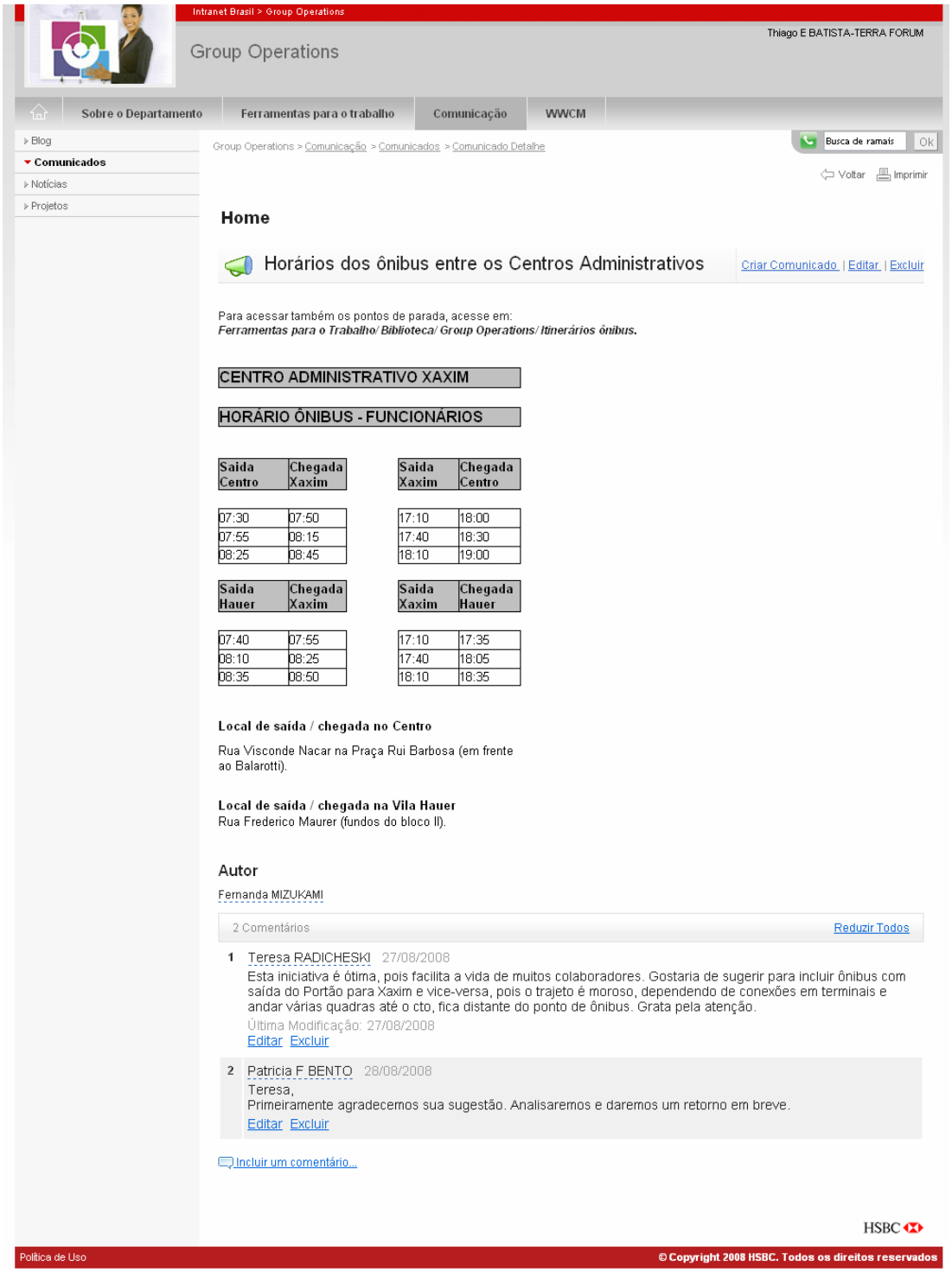
Pictured: In addition to the CEO's blog, departmental sites have blogs published by each department's director.

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Pictured: Discussion forums on the departmental pages let people weigh in on various topics.

Additionally, project members can publish announcements about operational issues and more urgent matters. Such announcements posted on project pages can be commented on and further discussed by their peers.



Pictured: Announcements are posted on departmental sites and users can comment on them. Department sites also feature a document library.

HSBC Brazil also links to the main HSBC TV station. At any given time, employees can choose from more than 100 episodes to watch. The TV station's interface offers tabs to make it easy for users to find the right information. *Playlist* offers a schedule for the week, and users can add their own playlists via a sub-tab. The *Program Guide* lets users look at programs by various categories, and *Search* lets them look for specific keywords.

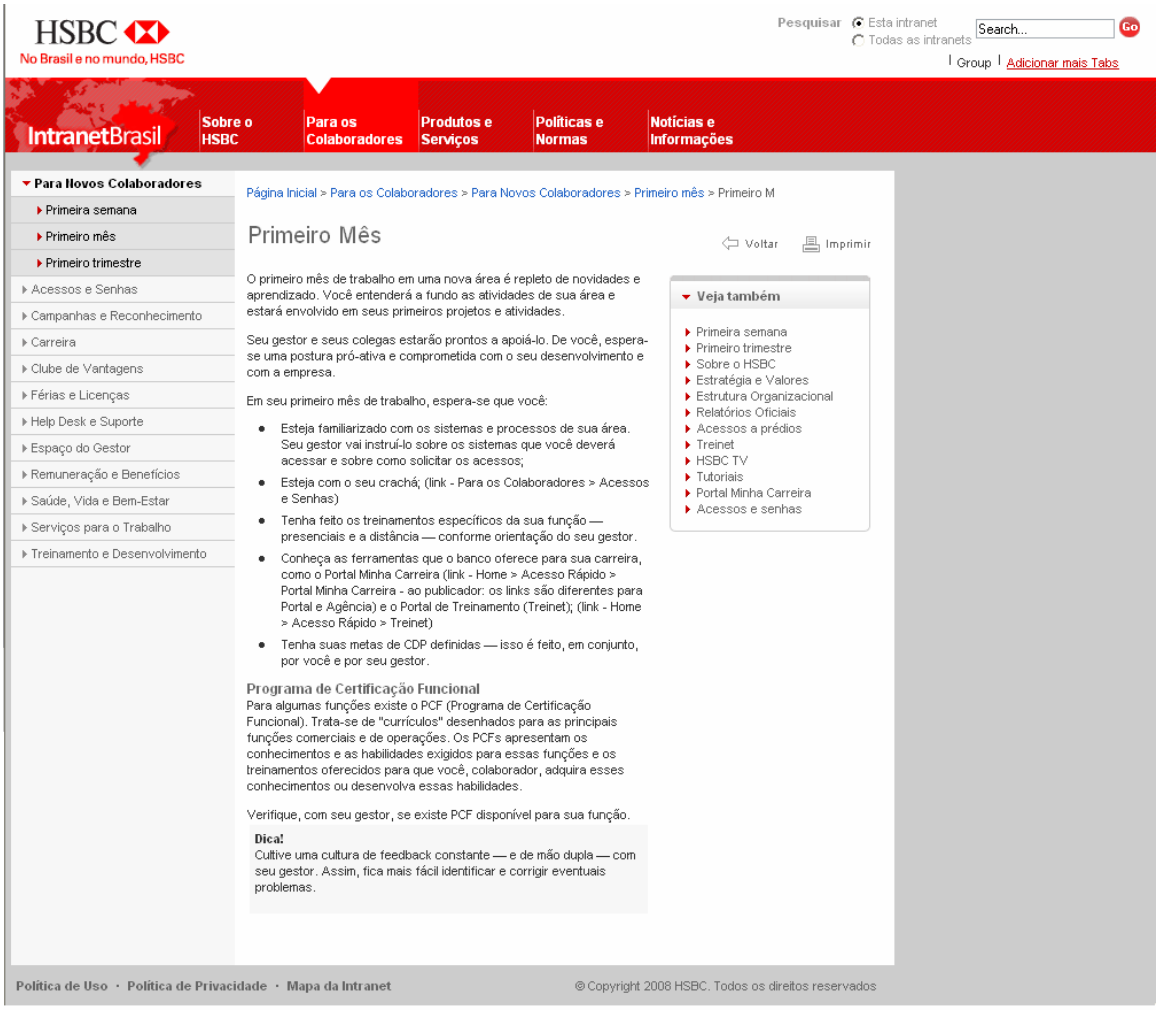


Pictured: The HSBC TV channel offers more than 100 shows for employees to watch at any time. Simple tabs and search help people find the information they want.

The intranet's *For Employees* section (*Para os Colaboradores* in the second global navigation tab), houses important information about working at HSBC. For example, some menu links include *For New People* (*Para Novos Colaboradores*), *Access to Passwords* (*Acessos o senhas*), *Career* (*Carreira*), and *Benefits* (*Clube de Vantagens*).

Helping new employees get started is necessary, but can be time-consuming. Companies must make new employees feel welcome and be productive quickly. On the HSBC intranet, the section for new hires does this, mapping things out for new employees based on their tenure. The secondary left-hand menu includes the following selections: *First week* (*Primeira semana*), *First Month* (*Primeiro mês*), and *First Quarter* (*Primeiro trimestre*). Information and steps for new employees to follow

are located in these sections. Housing this information on the intranet makes it easy for new hires to trust, follow, and feel confident with consulting.

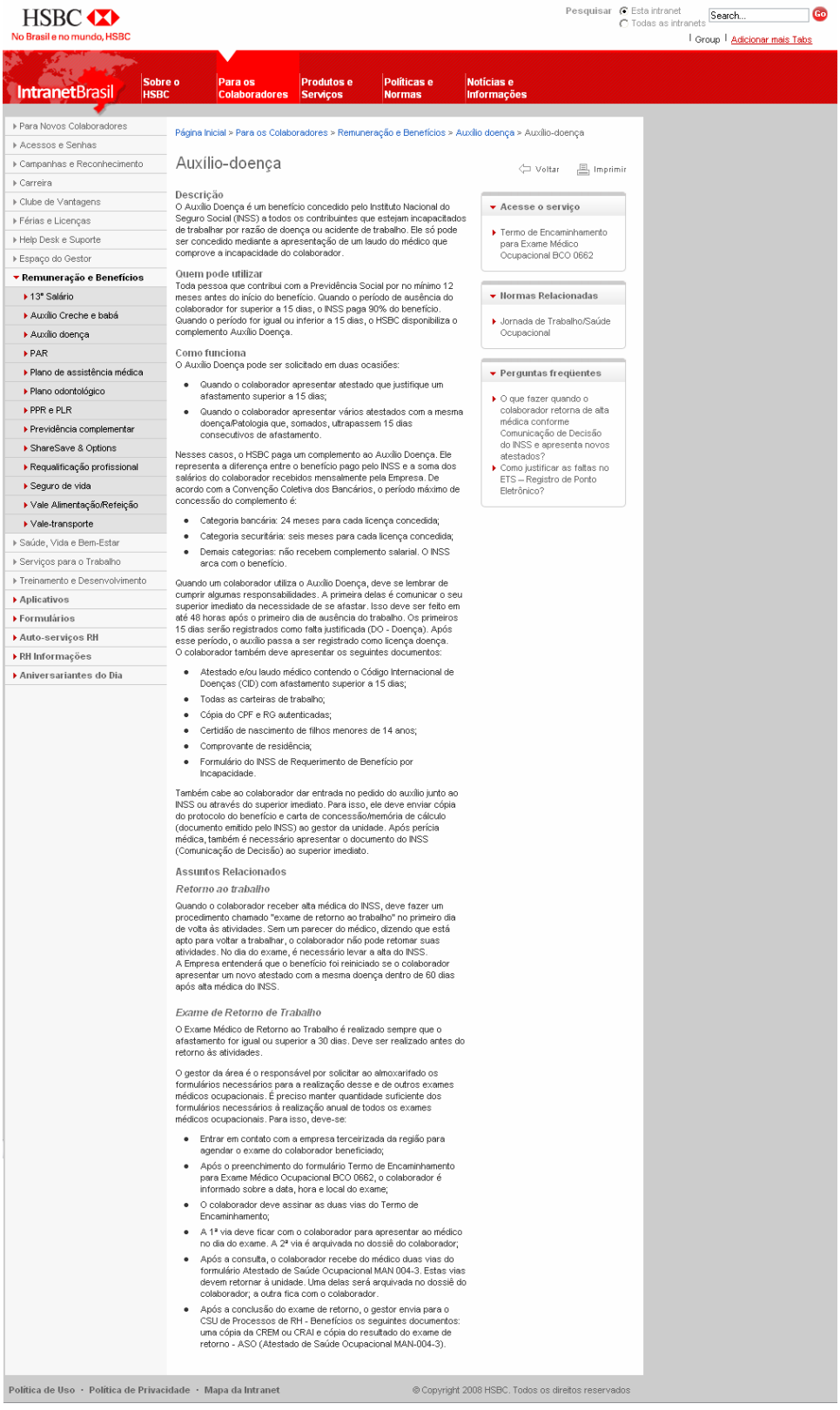


Pictured: The section for new hires helps them through the initial tasks at HSBC, right through their first quarter of working at the company.

The *Service's Quick Guide* is a template used for the compensation and benefits section (*Remuneracao e Beneficios*) that brings together all of the information needed about HR and administrative services available to employees. It's a one-stop-shop for related information such as policies and procedures, contact information, and frequently asked questions. Users can navigate through the titles using the following simple anchors: *Summary*, *Service Description*, *Who can use*, *How to proceed*, and *Contact and support information.*

The cross-navigation area appears on the right side of pages and includes *See Also*, to access related content; a *FAQ*; and *Related Policies and Procedures.*

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Pictured: The *Service's Quick Guide* brings together all of the information needed about HR and administrative services.

Mission Critical Information

Especially in today's financial climate, the information that the HSBC Brazil intranet provides must be the same across branches, and be easy to digest and communicate to customers and potential customers. One of the intranet team's objectives was to bring together all of this information to expedite processes and keep employees well informed with accurate, clear information. This is important because the people who use this information are mostly branch employees who are distributed across many (2,300) locations. The *Products and Services* (*Productos e Serviços*) tab puts together the plethora of offerings that HSBC Brazil employees must understand, support, and sell.

All of the bank's products are available on the intranet. The left-side navigation encapsulates links to the main areas of products and services, such as *Exchanging Monies* (*Câmbio*), *Capitalization* (*Capitalização*), *Credit Cards* (*Cartões de Credito*), and *Loans and Financing* (*Empréstimos e Financiamentos*). Once users choose a category, they can choose a tab that corresponds with their task.

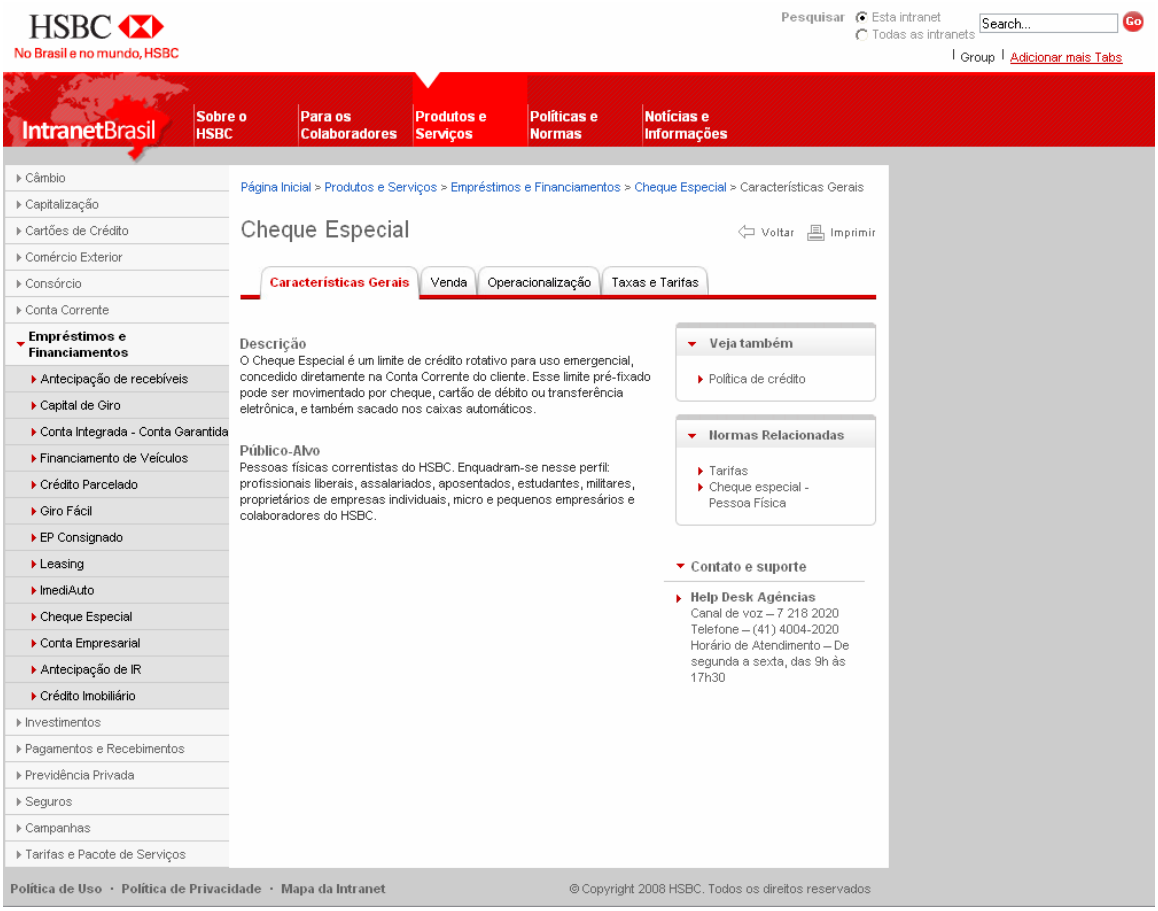
These tab choices include *General Features* (*Características Gerais*), *Selling Information* (*Venda*), *Operationalization* (*Operacionalização*), and *Rates and Fees* (*Taxas e Tarifas*). The tabs reflect the branches' processes in chronological order as they are completed or investigated.

One of the intranet designers' goals for this template was to refer people to related information such as product procedures and available training materials for the product. In this case, the template does just that. On the right side, people are directed to more information that will help them better understand the offering, with *See Also* (*Veja Tambem*) and *Related Content* (*Normas Relacionadas*). Employees can also refer to related forms, related policies and procedures, available training material, contact information, and support for more help.

When tabs are selected, they're brought to the fore and the text color changes from black to red. The design makes it easy to move between the four tabs that summarize all the points about the product.

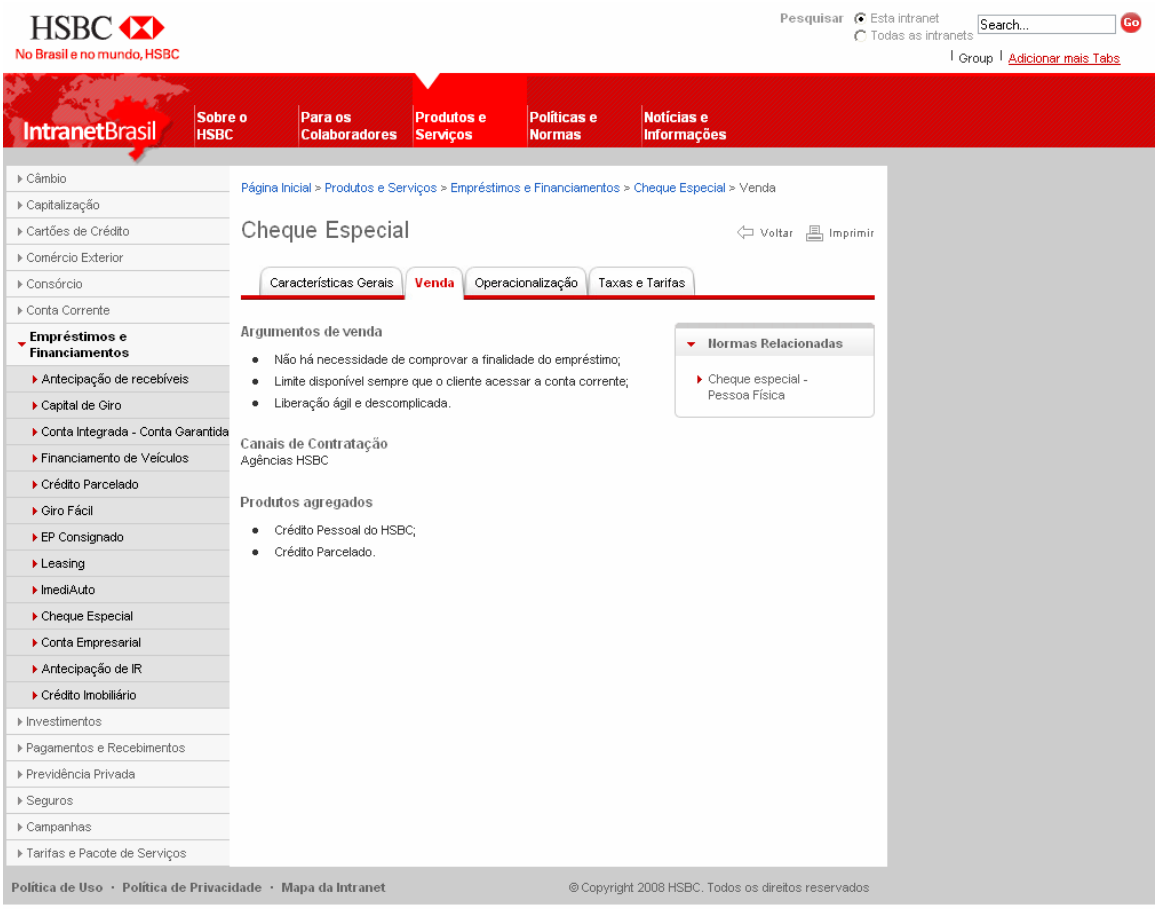
In the example below, the *Cheque Especial* page gives a short description of the offering. To help target sales to the right people, the page also has a *Target Audience* (*Publico-Alvo*) section. ("Cheque Especial" is a pre-approved limit on one's account.)

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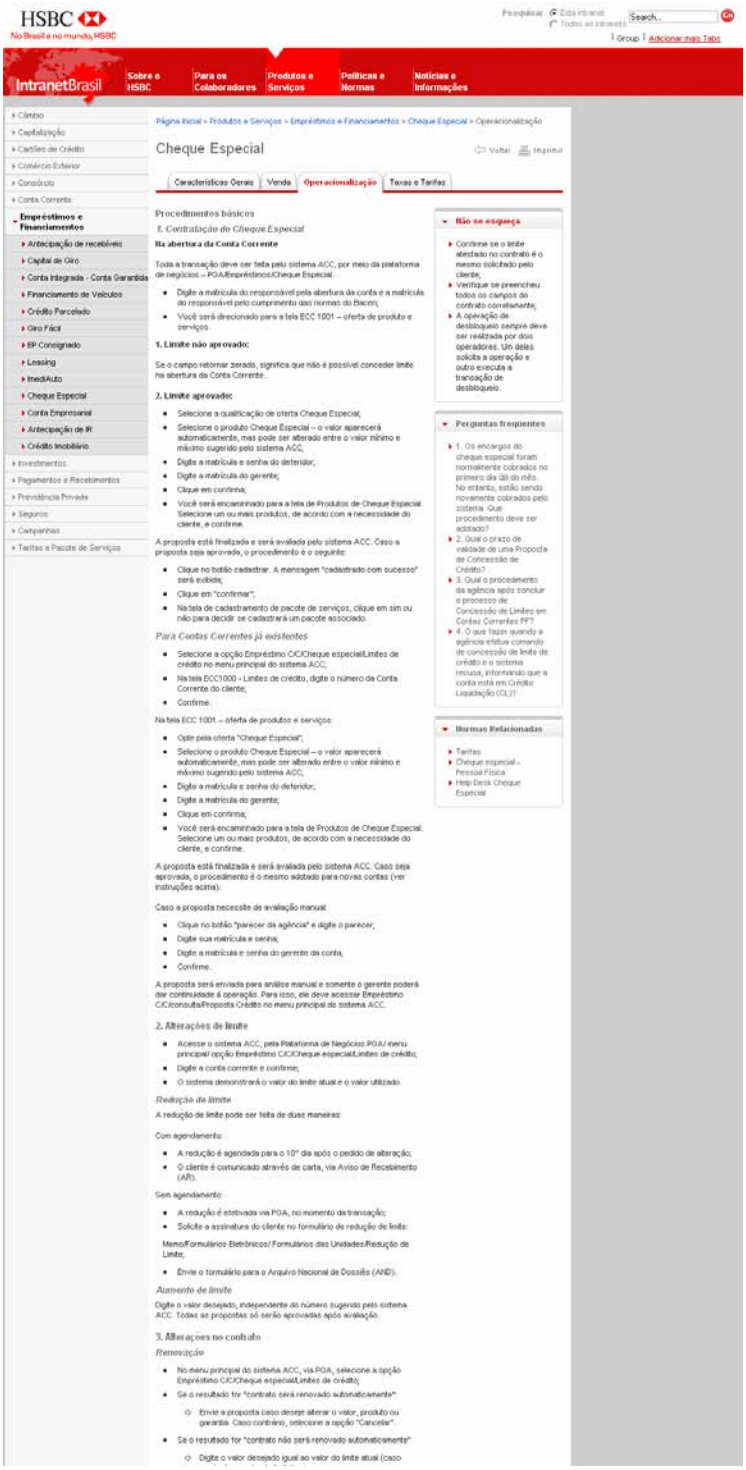


Pictured: The *Cheque Especial* page gives a description of the offering and a *Target Audience* (*Publico-Alvo*) description on the *General Description* tab.

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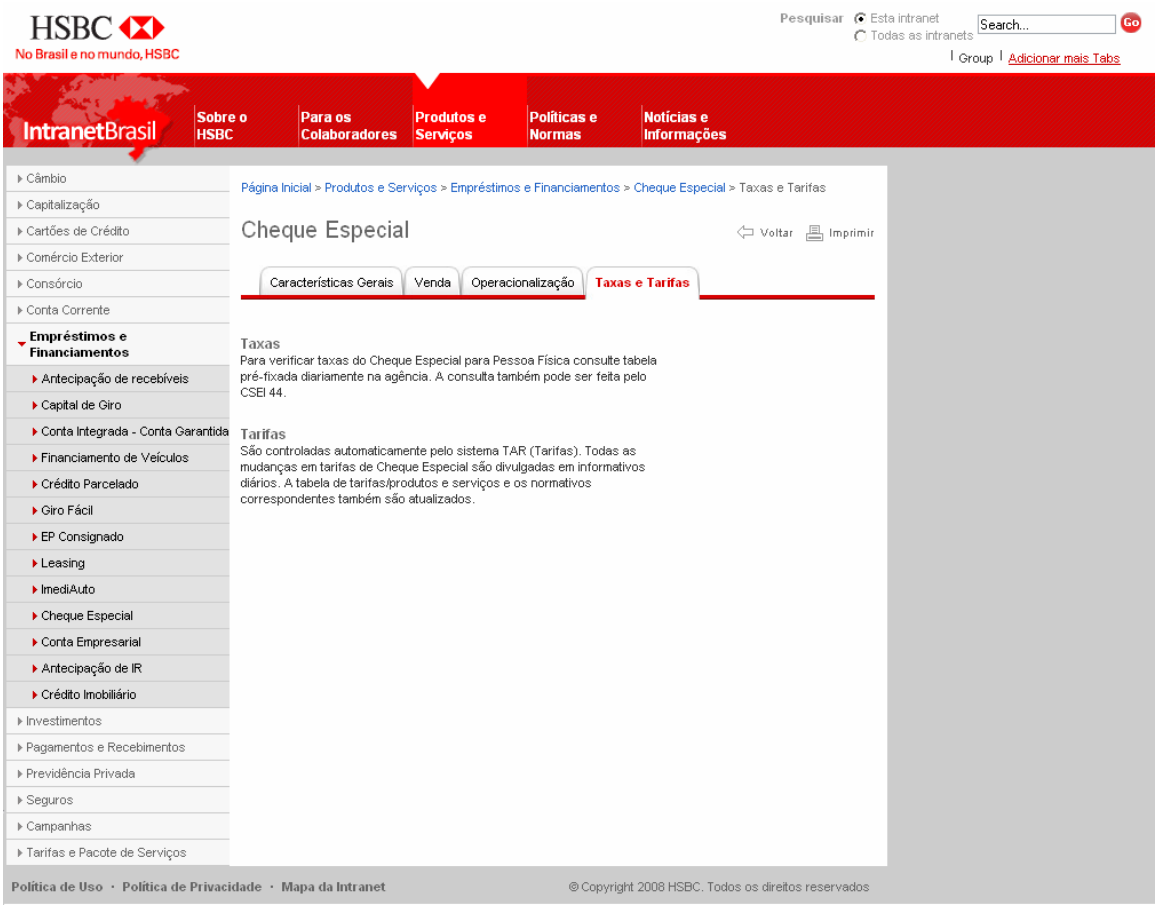


Pictured: The *Selling Information* (*Venda*) tab gives information about how to market and sell a particular product. Headings entitled *Reasons* (*Argumentos de venda*), *Channels* (*Canais de Contratação*), and *Related products* (*Produtos agregados*) summarize important sales points. This screen illustrates general characteristics of the product's *Quick Guide*.



Pictured: Although long, the *Operationalization (Operacionalização*) page provides users with step-by-step instructions on how to operationalize the selling of the product. The users also have a summary of important things to remember (*não se esqueça*, in the left corner).

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Pictured: The *Rates and Fees* (Taxas e Tarifas) section tells employees some of the tax and fee ramifications of the offering. The text is short and simple.

The intranet designers set themselves several goals, one of which was to improve relationships with clients. Intranet sections such as the ones above help employees quickly find, trust, and understand all of the information about the organization's products and services. They can therefore confidently and speedily sell the product—and answer any customer's questions—which inevitably improves relationships.

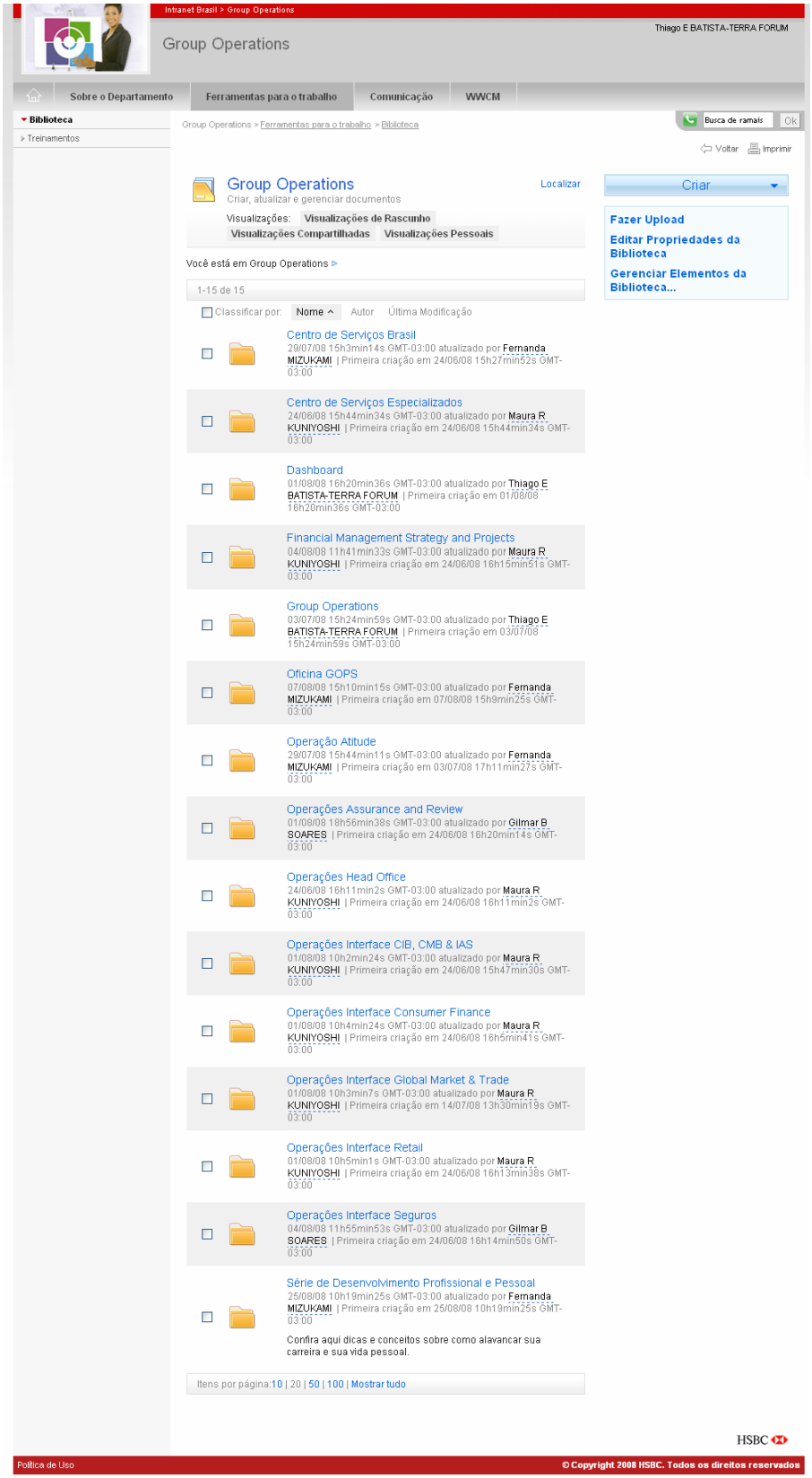
The intranet also includes a large library of reference materials to help employees find as much up-to-date information on topics as they need. People can find information using the search function or look for topics using the alpha list.



Pictured: This glossary is available within the virtual communities.

Also, for more targeted information, departmental areas of the intranet have their own document libraries.

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Pictured: A department area's document library.

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The communication vehicles on the HSBC Brazil intranet help employees feel heard, and remind them that they're part of a large but still cozy community at HSBC Brazil and HSBC as a whole. The information about products and services is so tightly written and consolidated that employees can't help but be stars with their customers. The HSBC Brazil intranet does a great service for employees and clients alike.

BACKGROUND

HSBC Brazil's current intranet is a result of a redesign project that began in late 2006. By beginning with a diagnostic phase, the team quickly realized that they could increase user satisfaction by simply implementing changes to the homepage layout. So, that's where they began. Initial changes to the homepage resulted in user satisfaction scores jumping from 84 to 93%.

This improvement was measured through an annual quantitative research study conducted by the company to evaluate the effectiveness of internal communication vehicles. The study included approximately 3,000 respondents.

The first part of the redesign—and the core of the project—took place throughout 2007 and included major changes to the site's layout, content, IA, search, and CMS platform.

Originally, the site was a static HTML design. As part of the redesign project, a custom CMS was built and the site's content was migrated into the new system to create a more dynamic environment.

At the end of 2008, the second phase of enhancements were completed, included collaboration spaces (department sites and virtual communities), a technology migration to IBM Websphere Portal, and a content migration to IBM's Websphere Web Content Manager (WWCM).

"We adopted this approach because we had to show results very quickly, and we realized that the biggest change that will impact directly the company and intranet's results was related to content, information architecture, and governance, instead of technology," says Carlos Franco, TerraForum partner and one of people responsible for this decision.

"So we prefer to use a simpler tool that would give us more flexibility and agility at that time of the project, instead of implementing a more robust tool where we would need better servers, bandwidth, and the team would need to gain the technical skills to implement it," he says.

INTRANET TEAM

The redesign project included a component to address site ownership. During the project's initial phase, project governance was moved from the E-Business group—a combination of intranet and Internet resources—to the Internal Communications department. This governance change was, in fact, the project's first outcome.

"By defining the governance structure, we could articulate the involvement of the necessary resources: from committees to tactical and strategic decisions, IT operational team, the business operational team, and so on," says Juliana Marques, director of Internal Communications and the primary person behind the project. "This happens at every company, but within a bank, if you want the commitment of people, you need to formalize all the roles and activities."

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Pictured: The HSBC intranet team (top left to right): Tiago Saturnino, Edilson Fontenele, Luiz Zimmermann, Bianca Zanardi, Paulo Floriano, Thiago Stefani, Clésio Ramos, Everson Reis, Luiz Prohmann; (bottom left to right): Juliana Marques, Tiane Yamaguchi, Luciano Miranda, Suzana Ribeiro, Giorgio dal Molin, Priscilla Fogiato, Fernanda Santos, Gilmar Soares, Maura Kuniyoshi, Denise Shibata, Gustavo Nadaline.

The current team structure includes five people on the business team:

- Intranet strategic manager
- Intranet tactical/operational manager
- Information architecture and design coordinator
- Content coordinator
- Intern

In addition to these staff roles, the intranet also has seven people responsible for managing news on the site (two HSBC employees and five from TerraForum).

The IT team resources for the intranet consist of one staff manager, one project manager, and three IT analysts.

A strategic committee is involved in intranet projects to evaluate the big picture decisions about the site. The intranet team reports on progress toward goals and reports site metrics to this committee. A tactical committee handles the tactical decisions of the portal (such as budget) and comprises heads of the main areas of the company.

Using Agencies

Some companies rely on outside vendors to supplement their own staff; HSBC, like many others, relied on agencies to provide skills that would augment their own staff's expertise. The site's design and content are outsourced to one outside agency, while another agency handles the planning, writing, and publishing of the site's news sections.

The intranet team at HSBC Brazil relied on TerraForum for their expertise and experience planning large-scale portal projects. The agency had a proven methodology for the planning and implementation required for this type of project. TerraForum worked on both phase I and II, providing the business case and conducting user research activities (interviews, card sorting, heuristic evaluations, maturity analysis, governance definition, and so on). During phase II, TerraForum worked with HSBC on all deliverables: IA definition; governance refinement; SEO; layout definition; policies and standards definition; and content strategy, development, and publishing.

Two additional agencies also contributed to the effort. Mídia Digital was responsible for developing the customized CMS templates (phase I), and BRQ, an IT company, was responsible for the technical configuration of Websphere, Quickr, and WWCM, including customization and installation (phase II).

This use of multiple agencies is not uncommon for these types of large-scale portal implementations. Indeed, it's becoming standard practice to engage several vendors to plan and execute project deliverables according to their various areas of expertise.

TIMELINE

HSBC's portal project is an ongoing initiative, with an expected completion date of 2010. The redesign project, covered in detail in this report, took approximately one year to complete and included the following project milestones:

HSBC PORTAL PROJECT MILESTONES	
Date	**Milestone**
November 2006	Beginning of intranet diagnostic and business case development.
May 2007	New homepage layout design.
August 2007	Beginning of phase I implementation, including IA, content planning and development, layout, and search engine optimization (SEO).
December 2007	Go live of phase I.
January 2008	Beginning of phase II, including IA, layout, content and governance revision, planning and implementation of collaboration spaces (virtual communities), and departmental sites.
July 2008	Implementation of collaboration pilot (two departmental sites and two virtual communities).
August 2008	Collaboration rollout (more departmental sites and additional communities).
December 2008	Go live of new platform (Websphere Portal); all content migrated to IBM WWCM.

January 2009	Beginning of Phase III Phase III and Phase IV, will consist of implementing features to support competitive intelligence, innovation, the development of online tools, and the improvement of actual features like people search, remote access, applications, and forms. These phases are also intended to execute more sophisticated concepts, including customization, content personalization, and accessibility.

GOALS AND CONSTRAINTS

The overarching goal of the portal project, called "Portal Intranet Brazil," is to transform the organization's intranet into a comprehensive intranet portal that will closely align with the company's business objectives. As such, the company established the following business goals for the project:

- Improve employees' satisfaction in working at HSBC Brazil
- Reduce costs and increase productivity
- Improve relationships with clients
- Increase sales

To accomplish these broader strategic objectives, the intranet required improvements in several key dimensions, including:

- IA (taxonomy, templates, navigation)
- Governance
- Layout
- SEO
- Content strategy (including developing and publishing)
- Policies and guidelines definition (editorial, design, and Web writing)

According to Luciano Miranda, the intranet manager, the project has already shown measurable success on the following objectives:

- **Be the most useful working tool for HSBC's employees**. The HSBC Brazil intranet is the most accessed intranet in the entire HSBC group: 97% of people access the intranet at least once per day.
- **Provide accessibility from any place and any communication device** (including mobile phones, palm devices, and notebook computers). Today, the top 500 executives have intranet access available from their smartphones.
- **Leverage corporate intelligence and the knowledge sharing.** The intranet currently has more than 1,000 pages with relevant content to help people do their jobs.
- **Improve internal communication.** During the user research after launching the redesign, the intranet was elected the preferred internal communication vehicle and rated first on relevancy, quality, agility, and credibility.

USERS

HSBC intranet users span the following groups:

- **Business unit professionals** use the intranet to assist with management, planning, corporate intelligence, marketing, HR, finance, and other functions.
- **Branch professionals** are responsible for selling, prospect and client services.
- **Back-office professionals** are responsible for products operations.
- **Outsourced professionals** have restricted intranet access.

Other HSBC employees worldwide have access to HSBC Brazil's intranet from their own units in other countries.

USER TASKS

The new HSBC intranet supports a variety of mission-critical user tasks. Among the most significant are the following:

- **Lines of business support.** Users have full access to the most relevant product information, including products' characteristics, audience, and selling points; comparisons with competitors' banks; taxes; financial market; and operational procedures. The primary objectives behind this service were to improve competitive advantage, increase sales, and reduce internal help desk calls.
- **HR services.** Most existing HR services are available via the intranet, including reviewing and requesting vacation time, accessing payment extracts, and reviewing and requesting corporate benefits. Today, all 27,000 employees are strongly encouraged to access these services online. The main goals behind this employee self-service are to reduce internal help desk calls and increase employee productivity.
- **Administrative services.** There are approximately 50 administrative services available on the intranet, including scheduling travel (11,000 users access each month), requesting supplies (5,000 users access each month), and scheduling meeting rooms (6,000 users access each month). Most users have online and self-service access to these services. The main goals behind them are to reduce internal help desk calls and increase employee productivity.
- **Communication.** The intranet has many tools that speed up communication between managers and employees—a crucial issue, given the company's geographic distribution. These communication tools include:
    - Web-based internal TV with a weekly schedule and more than 100 episodes available on demand
    - Corporate announcements
    - Corporate agenda
    - News
    - The CEO's blog
    - News clipping to provide employees access to relevant external news

- **Policies and procedures.** The site provides 4,000 pages of global and 60,000 pages of local policies and procedures.
- **People search.** The intranet's easy-to-use people search application houses all employees' contact information, including phone number, name, location, and so on.
- **Team communication and productivity.** Each company department has a specific website to store and distribute information between peers and among teams.
- **Improvement of processes and knowledge sharing.** The intranet features a community environment created for people to share information and acquire knowledge about specific themes in the company's process. Today, HSBC Brazil has a pilot program of two communities: leaders' career and process quality.

DESIGN PROCESS AND USABILITY ACTIVITIES

The redesign process included a variety of user engagement activities. The team segmented the project into three phases: diagnostic phase, phase I implementation, and phase II implementation. User research, testing, and engagement were conducted throughout all three as follows.

Diagnostic Phase

The diagnostic phase gave the team an opportunity to get perspective on the project and on user's reactions to the existing site. They solicited feedback from site users, business leaders, experts, and user experience specialists. They also looked at other company intranets for the purpose of benchmarking their own site and examining best practices.

The team began the diagnostic phase by conducting a series of focus groups and user interviews that included more than 3,500 employees from all regions of the country. Activities included:

- Usability tests (16 people)
- Quantitative research (1,500 people)
- Focus groups (250 people)
- Interviews (200 top executives)
- Card sorting (more than 200 people)
- Interview sessions (with approximately 1,200 users who were shown the project and offered feedback)

Through these activities, team members could assess the information needs of the users and identify business opportunities for the site.

The design team involved end users by conducting usability test sessions and card sort exercises to refine the IA.

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Pictured: The HSBC team conducting a card sort exercise with site users.

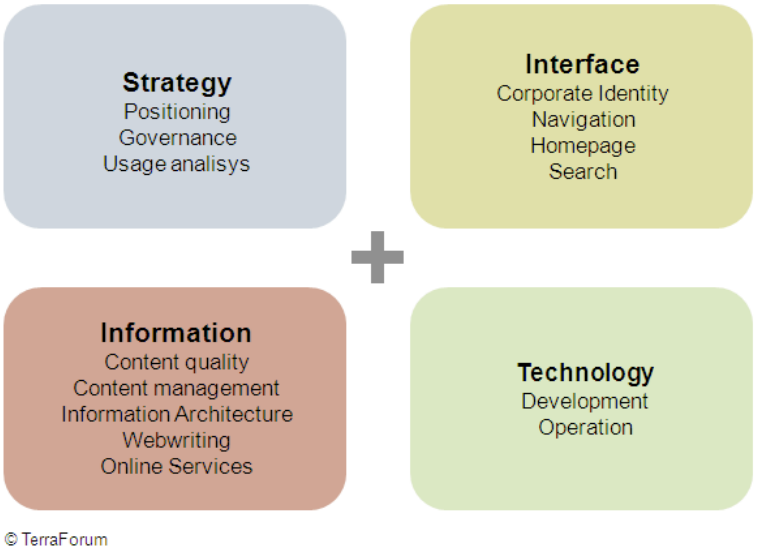
Separate from the user research, the team interviewed 200 top company executives to identify business opportunities where the intranet could add value to the company as a whole. The executive interviews yielded approximately 320 ideas, including the opportunities to:

- Improve collaboration among departments
- Improve communication within departments
- Provide sales and product information to branch employees, helping them increase sales and reduce rework in back office areas
- Put administrative services—such as maintenance requests and vacation scheduling—on the intranet to increase productivity
- Inform employees about what's happening in the company, including changes, results, challenges, and information on market influences

These insights were prioritized and converted into a medium-term project plan. According to Claudio Terra, TerraForum CEO, "HSBC chose a very robust project approach and has a clear vision about the intranet evolution and its potentialities to leverage the organization businesses in the country."

To get some outside perspective, the design team engaged specialists from TerraForum to conduct heuristic evaluations and perform a gap analysis on the existing site.

This process involved a maturity analysis that evaluated four aspects of the site: strategy, information, interface, and technology. The following chart illustrates this maturity analysis breakdown.



Pictured: The maturity analysis conducted by HSBC's agency partner, TerraForum, analyzed the intranet on four aspects: strategy, interface, information, and technology.

In addition to this outside analysis, the design team also conducted a benchmark study, analyzing the HSBC intranet against 20 other Brazilian intranets, including five from the financial industry. The study also benchmarked all HSBC Group intranets and analyzed best practices from intranet research, including intranet reports from Nielsen Norman Group.

Phase I: Planning & Design

What the HSBC team refers to as "Phase I Planning & Design" was a design and architecture phase that included involving users in various rounds of iterative prototyping. A high-level navigation structure was designed and validated through card sorting sessions (involving more than 300 people), while paper prototyping was used to refine the deeper levels of navigation (third and fourth tier) and validate page templates.

The team's design approach was iterative and included multiple test sessions involving users. This approach helped the team refine the design incrementally in response to the test results.

During this phase, the team began the difficult task of rewriting content. The redesign project involved rewriting most of the intranet's content, which included approximately 600 pages (and more than 1,500 "standardized written sheets" a term used in Brazil to describe a document with 1,400 characters) of institutional, HR, and administrative content. The content initiative was a joint collaboration between the content owners (who often resided across the many bank departments) and the intranet team. On the business side, more than 150 people contributed new content utilizing a wiki to write, edit, and refine it. The team then published the content to the intranet via the CMS.

The team chose the wiki approach for two reasons. First, by using a wiki at this phase, they were introducing collaboration tools into the bank environment and getting users accustomed to using them. And, according to Project Manager Paulo Floriano, a wiki was simply the best tool for the job. They needed to create content with the participation of dozens of people—content managers, legal and institutional staff, the help desk department, HR, compliance, and so on—and the wiki facilitated that collaboration.

“Consolidating a wide range of opinions and mental models was not easy,” says Suzana Ribeiro, one of the TerraForum editors responsible for the content rewriting. “But we did a good job engaging people in the process.”

What also helped was a writing manual, which the team developed to codify the specific guidelines for writing for the HSBC intranet.

The final piece of the phase I architecture was applying SEO to the new content. To aid in this task, the team mined search logs.

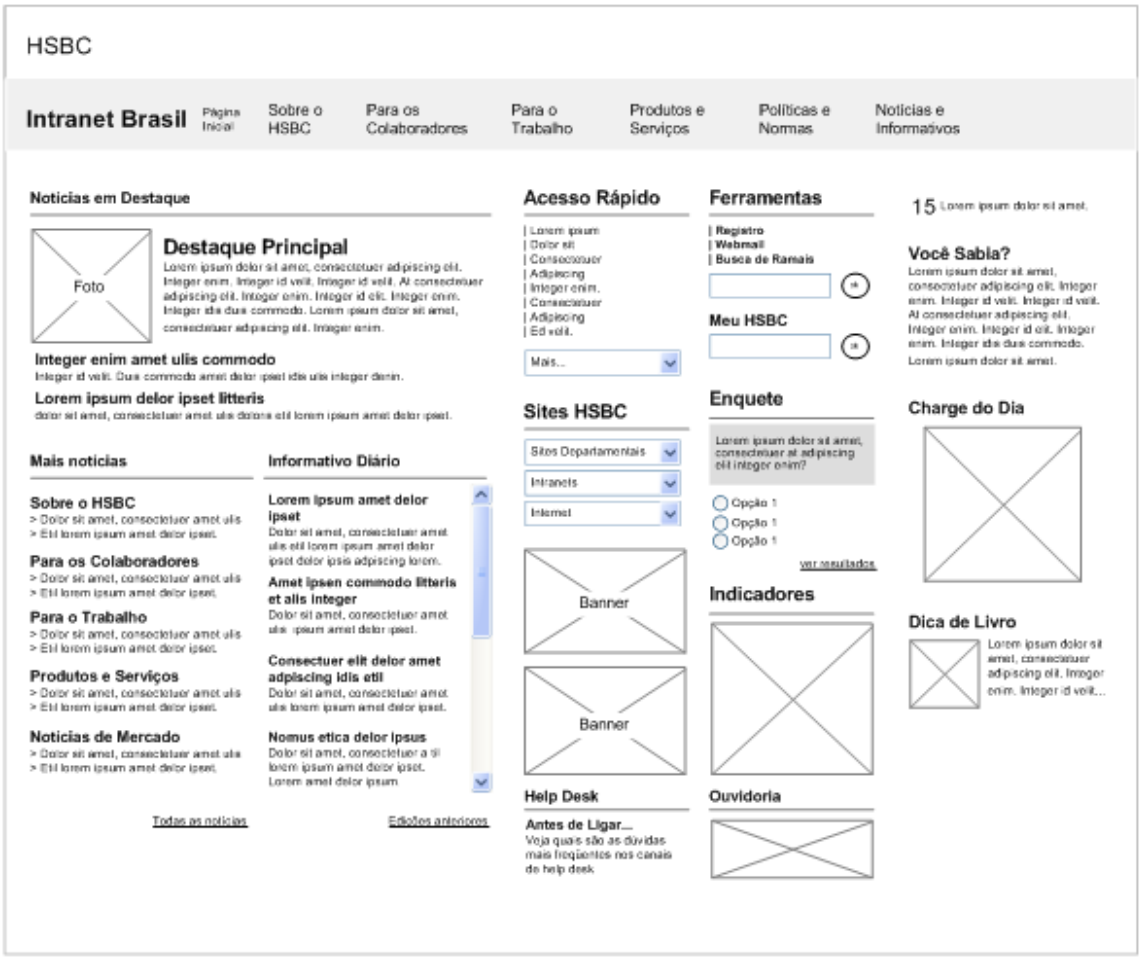
Phase II: Implementation

Phase II let the team test the work completed in phase I. While phase I was a chance to define the IA, taxonomy, layout, and content, phase II was where the team tested and refined these items—because, as Floriano notes, this was where they could see, in practice, how every item was working in terms of IA, taxonomy, and layout. The phase II work also included a platform change (migration to IBM WWCM) and implementing collaboration items (departmental sites and communities of practice).



Pictured: A user works with a paper prototype.

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Pictured: One of the wireframes developed by the HSBC design team.

Findings

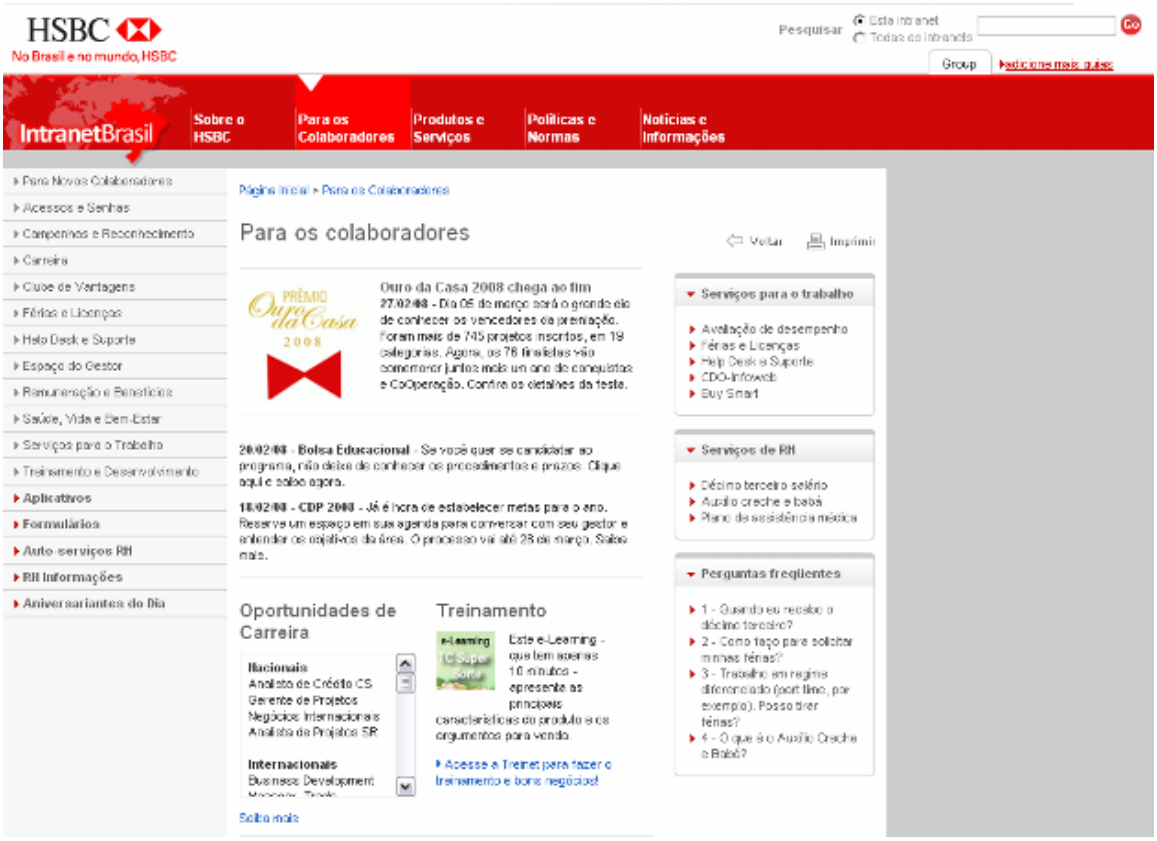
As often happens during user testing, the HSBC team found discrepancies between how the team viewed some information and how the users themselves viewed it. A good example occurred during a card sort with employees from Losango, a company HSBC Brazil had recently acquired. The team had assumed that Losango users would want their content segregated from the core HSBC information; the card sort proved otherwise. “We thought users wanted a separated area for their content,” says Denise Shibata, IA intranet coordinator. “Surprisingly, the card sorting proved to us that users don’t see themselves as a separate audience. They wanted to see Losango integrated in the intranet’s architecture.”

Another result that the team found interesting was that, in test sessions following the phase I implementation, the team observed that users sometimes found the intranet’s main sections—which had a high volume of content—intimidating to navigate. “We found that, because of the high volume of content that each section has, users sometimes didn’t know how to start to navigate,” says Shibata. “They were a little cautious to start to navigate and didn’t find what they were looking for.”

Because of this finding, the team implemented support elements such as navigation by themes, alphabetical indexes, lists of content with frequently asked questions and most accessed pages.

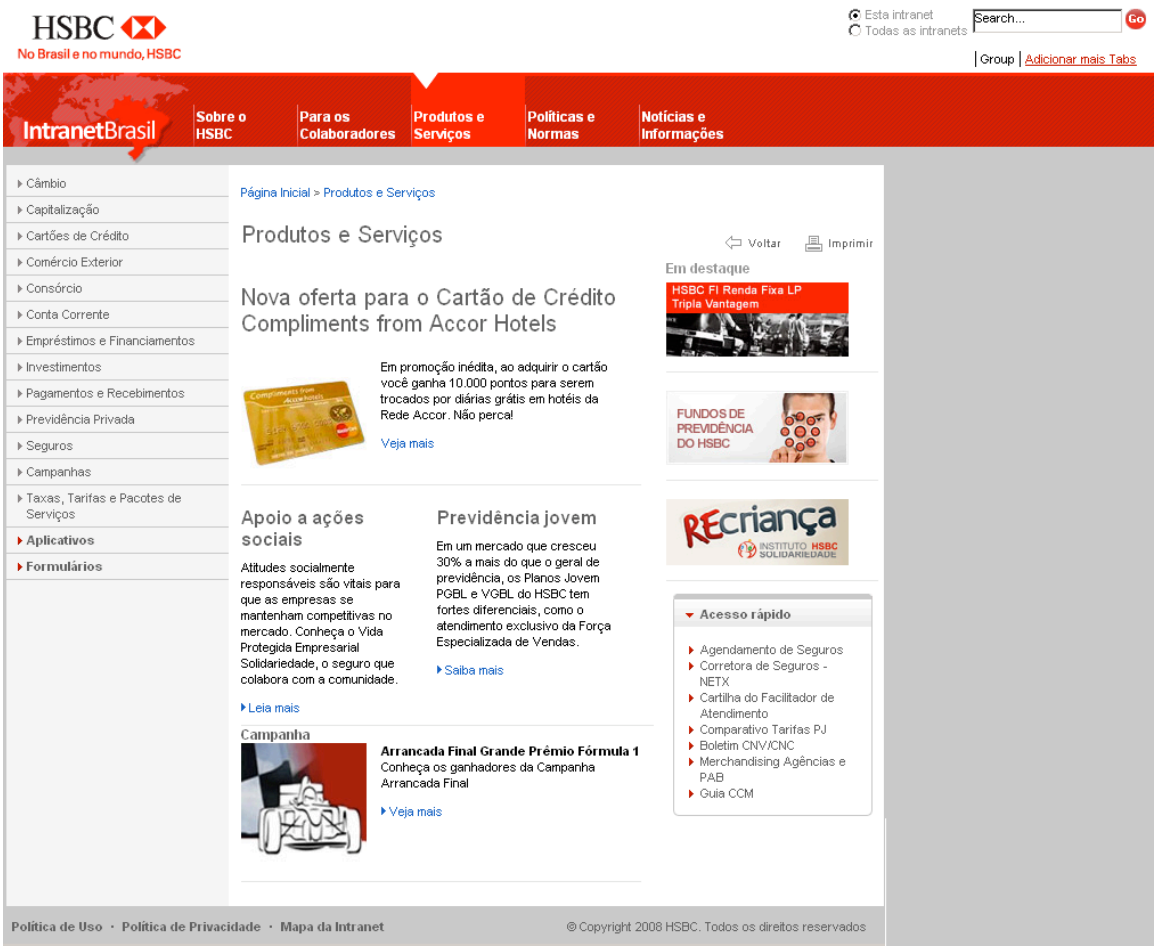
10 Best Intranets: HSBC Bank Brazil

The ultimate solution, they realized, was to create "subhomes." These subhomes serve as landing pages for each of the main sections (*About HSBC*, *To Employees*, *To Work*, and son on) and also serve as a starting point for users.



Pictured: Every section in the top-level navigation menu has a subhome. The team created these pages to facilitate user navigation within each section and to help users deal with the site's considerable volume of content.

10 Best Intranets: HSBC Bank Brazil



Pictured: The *Products and Services* (*Produtos e Servicos*) subhome.



Pictured: A collage of photos taken from the face recording during the usability tests.

URL AND ACCESS

The HSBC intranet portal is available at http://portal.hsbc.com.br and is every user's start page.

TECHNOLOGY

The intranet uses IBM Websphere and its components, including:

- WWCM for content management
- Quickr for collaboration places
- Portal search for searching collaboration places
- Groups and users management

Other software used in the HSBC Brazil portal includes:

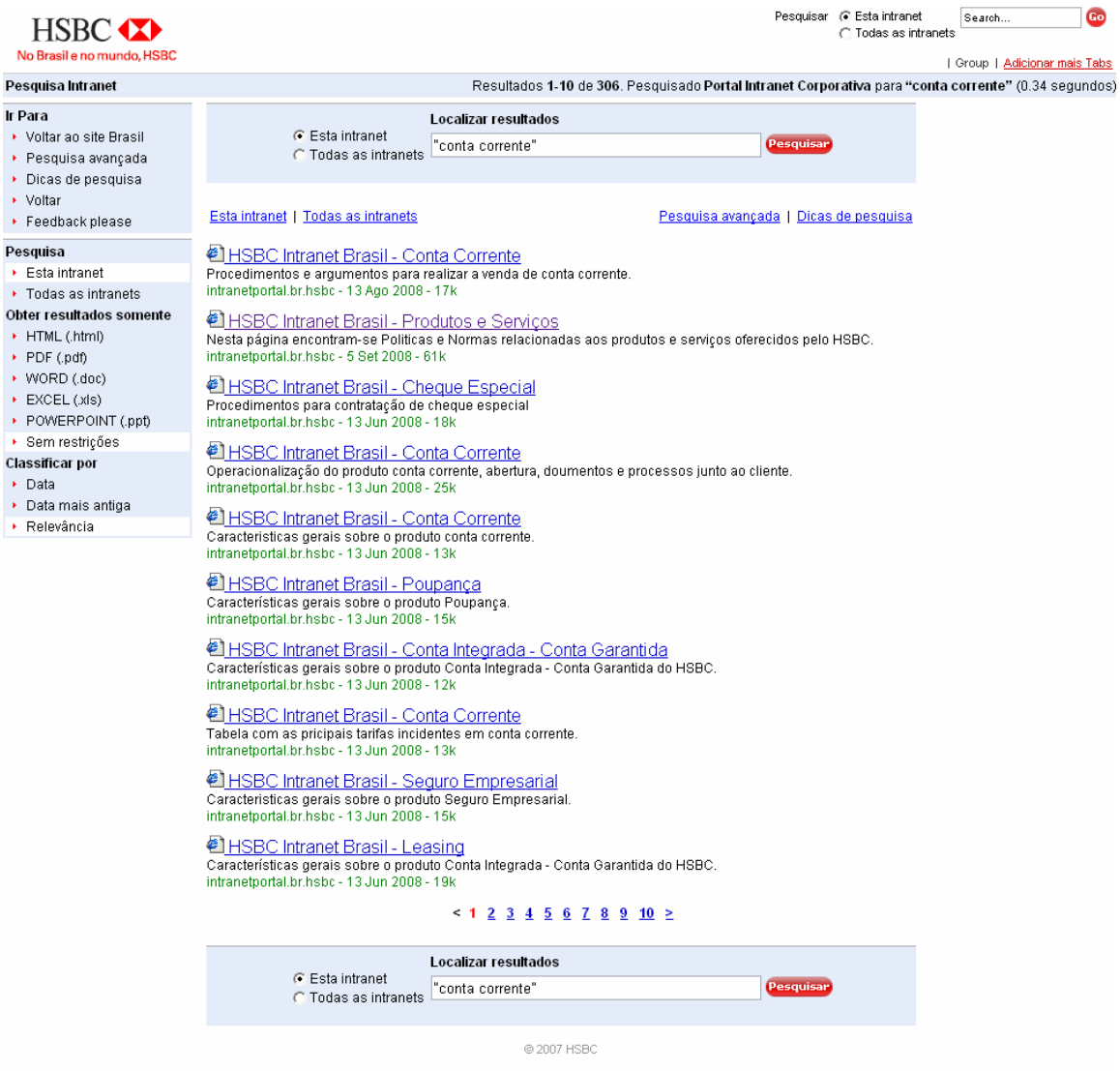
- Proprietary software to manage policies and procedures (it will be integrated in the future to the WWCM)
- Proprietary software for quizzes, polls, and research
- Cisco software for Web-based internal TV
- Proprietary software for the CEO's blog
- Proprietary software to manage external news clipping
- More than 1,500 automated business forms
- More than 150 automated business applications and workflows

- Proprietary (global) software to manage tests and quality assurance
- WebTrends for statistics

SEARCH

Verity K2 is the global HSBC tool for search. "We work with Verity K2, a very powerful search engine," says Floriano. "One of the parts of our work was the search engine optimization. We made several changes and established policies for all the pages and documents of the intranet. We refined the title, description, and keywords of every single HTML page and primary Office documents."

The team is still in the process of gathering hard data about this search work. They are still developing search improvements as they go along. Some of the near future enhancements will include integration of thesauri (Verity K2 has native thesauri, but they need to be translated) and refinement of advanced search.



Pictured: Search results for bank account ("conta corrente"), an HSBC banking product.



Pictured: Results from a people search on the HSBC intranet.

CONTENT MANAGEMENT

In moving to a portal platform, HSBC has also moved from relying on static, document-based content toward more dynamic collaboration-based content. The new site relies less on stored documents (Microsoft Office documents, pdf files, and the like), and more on document repositories within the collaboration spaces (departmental sites and virtual communities). Within these collaboration spaces, the document repositories have native version and history control (using IBM Quickr). All subhomes have a list of the "last updated pages" within each section.

The team used WWCM as the content management tool.

As far as the content itself, some parts of the intranet are decentralized, including forms, applications, policies and procedures, the CEO's blog, and all of the collaboration places. Part of the current project is to completely decentralize all intranet content, but the team admits that this is still a work in progress.

Because decentralizing everything is a huge task involving the entire organization—at least 500 people, between content writers and approvers—they are being very cautious. "To do something more structured and effective, [we are] first decentralizing some areas that have the expertise and can exert the effort required to dedicate to this task," says Fernanda Santos, intranet content coordinator. "By using this approach, we are reducing the risks of deviation of content and writing."

The intranet team is responsible for maintaining the policies and guidelines for content, layout, and IA. They have established a template library for content users

that consists of 21 templates for the intranet and no more than 10 templates in the collaboration environment.

MOBILE

Making the decision to build the site with strict adherence to the W3C standards facilitated mobile intranet access. This gives the site basic customization for portable devices. As a result, the top 300 executives can access the intranet via their smartphones. The intranet team has no specific plans to customize the site further for specific devices, until the beginning of phase III, which begins in January 2009. The phase will also focus on other accessibility issues.

FEATURES

The following are the main features of the HSBC Brazil intranet:

- **The CEO's blog.** In 2005, Emilson Alonso, the bank's president at that time, created a blog to communicate more effectively with his employees and obtain feedback on important company strategy issues. Since that time, more than 200 articles and 8,000 comments have been posted and the blog has been viewed more than 2,000,000 times. Participation is opened to all employees.
- **News**. The site's news is split into topics and themes that follow the same principles as the main intranet section's categorization: *About HSBC* (institutional news), *To Employees* (HR News), *To Work* (administrative news), and *Products and Services* (financial products news).
- **Circulars, forms and reports**
- **HR employee self-service**
- **Administrative self-services.** These logistic- and facilities-related self-services include:
    - more than 1,500 **automated business forms**, and
    - more than 150 **automated business applications and workflows.**
- **Corporate calendar**
- **E-learning**
- **Online career opportunities**
- **Quiz, poll, and research applications**
- **External news clipping.** HSBC hired an external company to research the most important daily news of interest to employees (see the screenshot below). Users can filter by category—such as printed matters, Web, and so on—and search.
- **Web-based internal TV**
- **Currency quotation and exchange rates**
- **Departmental sites.** These specific sites include tools such as blogs, news, calendars, announcements, and private document libraries.
- **Communities of practice.** These specific environments provide tools to enable discussion among peers and departments. Tools include discussion forums, calendars, announcements, and document libraries.
- **Search.** The HSBC Brazil intranet uses Verity K2, the search engine defined by global IT. Verity K2 has advanced searching options, filtering, sorting, and

results categorization. Users can also search from the Brazilian intranet to any other countries' intranet within the HSBC family.

- **Product's quick guide.** This template was created with the objective of bringing together all the information needed for selling and operationalizing HSBC products and services. It also serves as an access point for related information, such as product procedures, available training materials for the product, and so on. To meet its objective, the template makes liberal use of cross-navigation tools.
- **Service's quick guide.** This template was created to bring together all the information needed for employees to utilize HR and administrative services. It also serves as an access point for related information, such as policies and procedures, contact information, and frequently asked questions.
- **People search**: From the homepage, users can search for people by name or phone number. As the screen below shows, the search results include the person's name, ID, phone number and Voice Channel (VoIP), department, and location. The feature is used by 60% of site users at least once a week.

10 Best Intranets: HSBC Bank Brazil

HSBC
No Brasil e no mundo, HSBC

Pesquisar Esta intranet Todas as intranets Search... Go
Group | Adicionar mais Tabs

IntranetBrasil | Sobre o HSBC | Para os Colaboradores | Produtos e Serviços | Políticas e Normas | Notícias e Informações

- Blog do CEO
- Campanhas
- Circulares
- HSBC TV
- Informações do Banco Central
- Informativo Diário
- Notícias de Mercado
- **Publicações HSBC**
  - Internas
- Sites Externos

Página Inicial > Notícias e Informações > Publicações HSBC > Internas> Notia

Mais espaço e agilidade

Voltar Imprimir

15/09/08 - Equipe de notícias do HSBC

Em breve você perceberá duas melhorias que vão tornar sua utilização do computador muito mais rápida. A primeira diz respeito às suas mensagens de correio eletrônico, que agora ocuparão menos espaço em sua caixa postal.

Desde o dia 1.o de setembro está disponível a ferramenta ***ZipMail for Lotus Notes***. Já utilizada na maioria das unidades do Grupo, ela está sendo configurada nas máquinas do HSBC Brasil e **até 8 de outubro** estará disponível para todos os colaboradores. O *ZipMail* **compacta os arquivos anexados ao e-mail automaticamente**, ocupando muito menos espaço na caixa postal.

"O tráfego de arquivos pesados torna a rede mais lenta e sobrecarrega o sistema", explica Sirlei Weber, da área de HTS. Além da melhoria na performance do Lotus Notes, a ferramenta também vai promover uma melhora no gerenciamento da caixa de correio. Segundo Katherine Flores, da equipe de infra-estrutura de correio eletrônico, "atualmente os colaboradores têm que **limpar a caixa postal com freqüência**, pois os arquivos ocupam muito espaço e o limite de utilização é preenchido rapidamente. Agora, o mesmo espaço vai render mais".

Para você ter uma idéia, ao enviar um arquivo de 5MB com o ZipMail o tamanho pode ser reduzido em até 50% - alguns testes feitos pela área de HTS mostraram que a redução pode chegar a até 80% em alguns casos.

Economia para as áreas



Além da comodidade e agilidade para os colaboradores, a medida também deve gerar economia para as áreas e para o HSBC. "Cada colaborador tem uma cota de 75 megabytes em sua caixa de email, e a área paga R$ 0,60 por cada megabyte usado. Como a ferramenta compacta os arquivos, será possível ter mais mensagens no mesmo espaço. Ou seja: paga-se o mesmo valor, mas é **possível mandar e receber muito mais e-mails**", esclarece Délcio Soviersovski, também de HTS.

A instalação do ZipMail é automática e será feita por meio de um arquivo distribuído via SMS, sem nenhum impacto para sua rotina de utilização do computador. "**Não existe nenhum risco de perda ou alteração de arquivos**", garante Délcio.

Por isso, não perca tempo e acesse agora o passo-a-passo sobre a ferramenta.

Arquivos em backup: menos tempo, mais economia

Outra novidade é a política de backup nas áreas públicas dos computadores. Você sabia que todos os arquivos deletados ou modificados em sua máquina ficam armazenados nos drives G:\ ou H:\ e podem ser recuperados em caso de necessidade? Hoje em dia, eles ficam guardados por cinco anos, mas a partir de 1° de outubro passarão a ficar armazenados por **dois anos**.

"Fizemos um grande estudo sobre as rotinas de armazenamento dos arquivos", esclarece Marcela Bortolaz, de HTS. "Analisamos todos os chamados para o Help Desk abertos em 2007 relacionados à recuperação de arquivos deletados. Nenhum deles pedia a recuperação de dados anteriores a dois anos. Estávamos tendo um custo muito grande para atender a uma **demanda que não existe**."

É importante lembrar que esta ação só atinge os arquivos deletados ou modificados. **Arquivos "ativos" guardados nas áreas públicas não sofrerão nenhuma alteração nem têm tempo determinado de arquivamento**. Por isso, a única mudança que você deve perceber com essa nova diretriz é na performance de seu computador, que ficará mais ágil.

Entretanto, algumas áreas podem ter a necessidade de manter arquivos por um período maior do que dois anos. Para fazer isso é fundamental que o colaborador informe sua necessidade ao administrator de redes da unidade e justifique a solicitação, para que estes encaminhem a solicitação à HTS e os ajustes sejam feitos.

Faça sua parte

Você também pode colaborar – e muito – para que seu computador funcione bem e com rapidez, com algumas ações. Marcela recomenda que todos os colaboradores ajam com bom senso ao salvar arquivos nas máquinas da Empresa. "Sabemos que guardar MP3 e fotos pessoais no computador do HSBC não é permitido pelas políticas do Grupo, por exemplo. Além de ir contra as regras, esse tipo de atitude gera um desperdício muito grande, já que esses documentos também são arquivados em backup", esclarece. Por isso, fique atento a essas dicas:

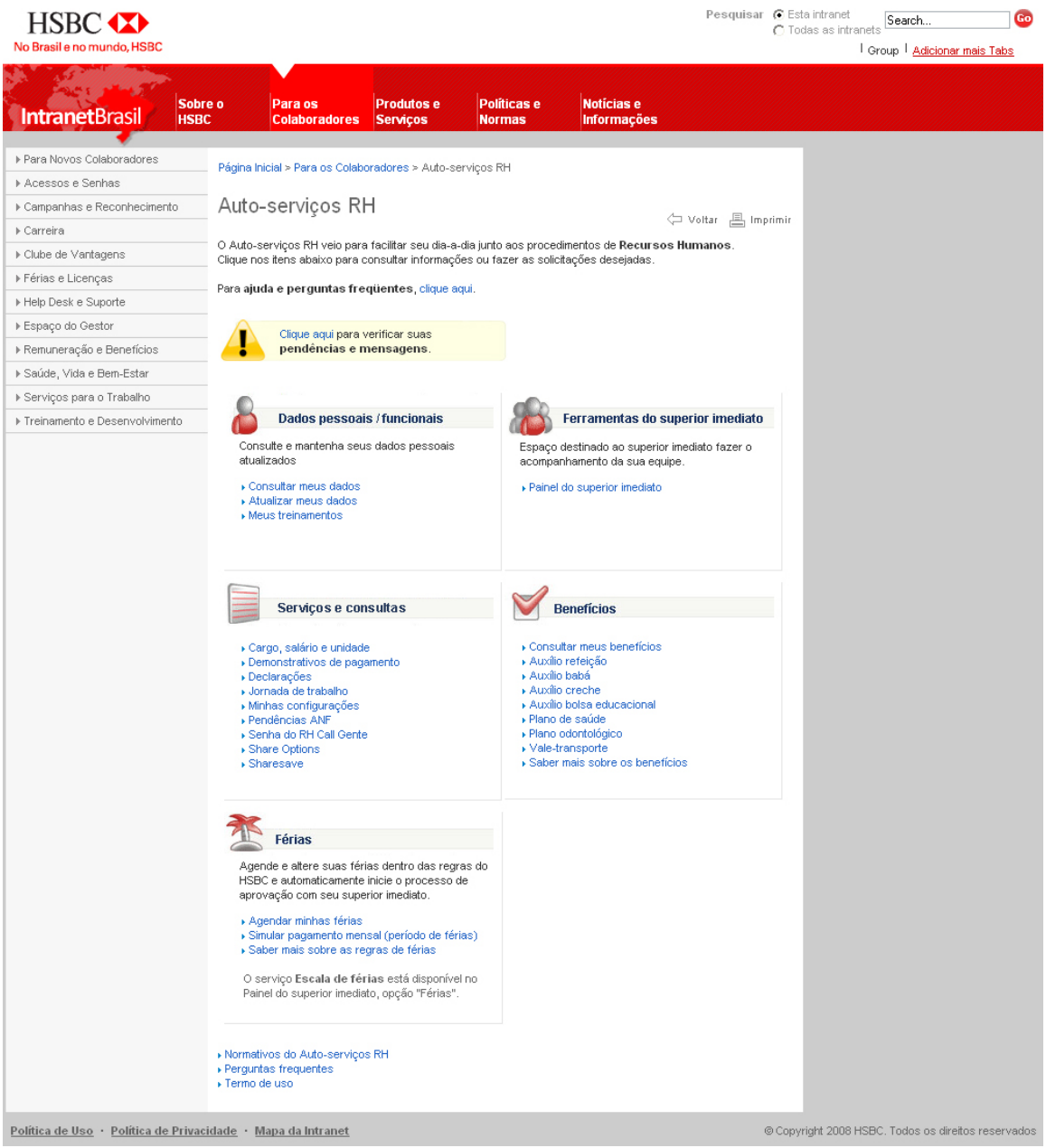
- Faça revisões periódicas em seus arquivos e avalie o que precisa ser guardado e o que pode ser excluído;
- Salve as informações mais importantes em um CD;
- Não baixe músicas, fotos ou vídeos pessoais no computador do trabalho. Com coerência e responsabilidade, todos saem ganhando.

Política de Uso · Política de Privacidade · Mapa da Intranet

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Pictured: A news page.

10 Best Intranets: HSBC Bank Brazil



Pictured: The intranet's main *HR Self-Services* (*Auto-serviços*) page.

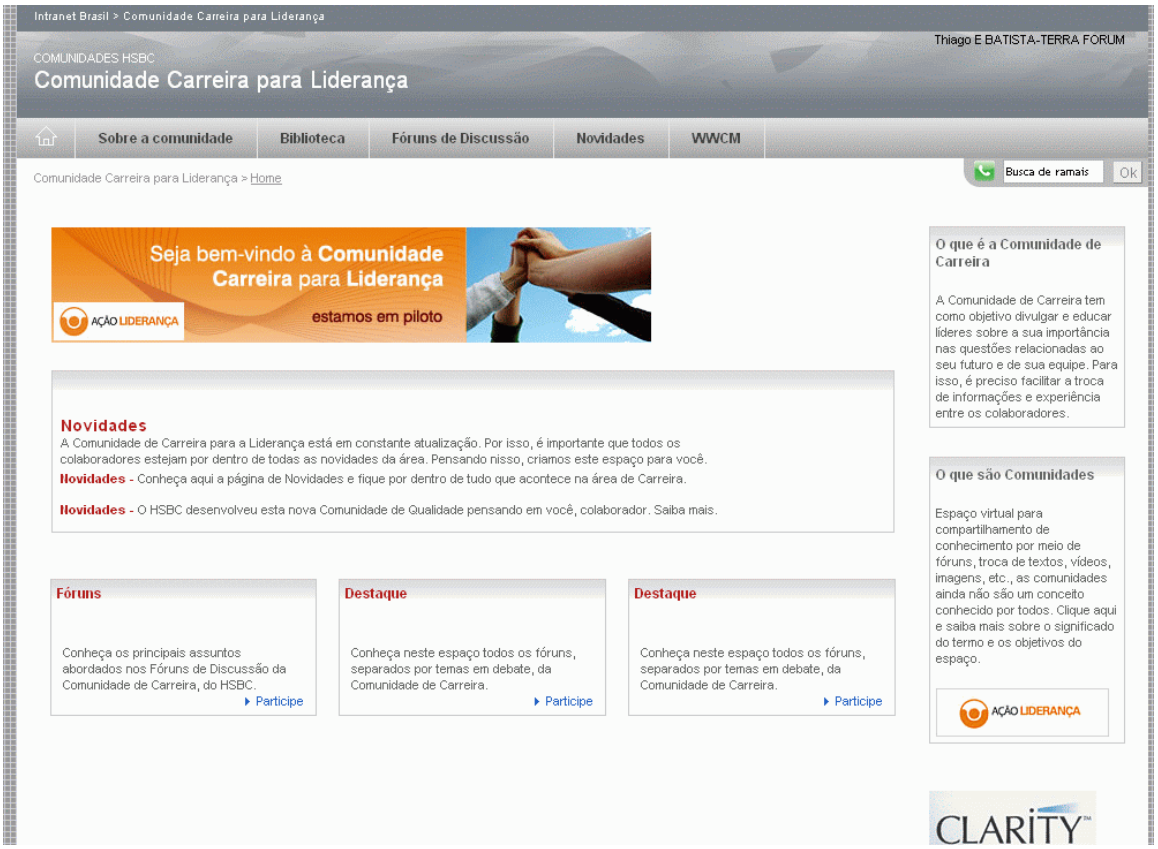
Collaboration Tools

Communities

The communities of practice were created to increase collaboration around topics of strategic interest to the organization. The process of choosing the communities for the project's pilot-phase consisted of a detailed process of prioritizing the functionalities and the architecture by including users in test sessions to refine the communities.

Each community includes the following areas:

- **About the community.** This area contains administrative content, including rules, moderators, results achieved, and a description of the community.
- **Document library**. The library serves as a repository of reference materials, including articles, a glossary, and frequent asked questions.
- **Discussion forums.** This area includes both open and restricted forums to discuss defined topics.
- **News.** Here, users can find informative content aimed at what is and will be happening in the community.

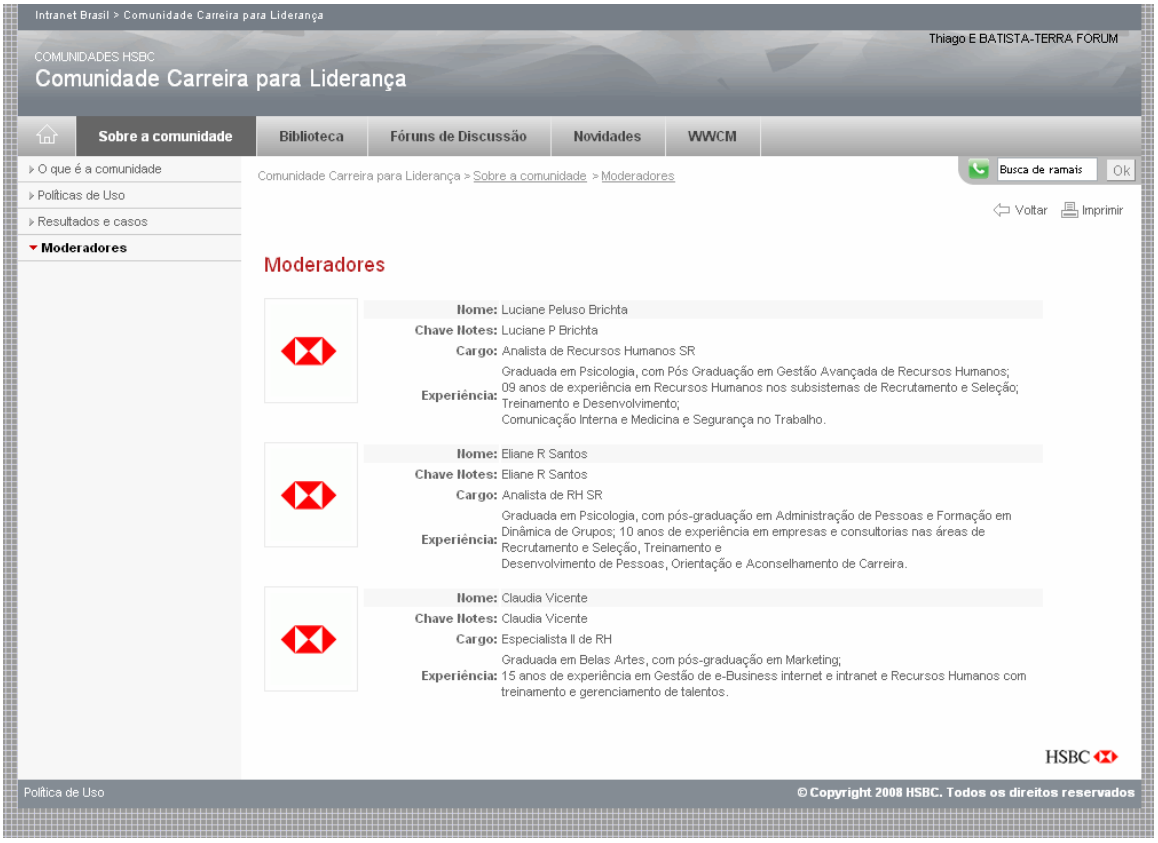


Pictured: A community homepage on the HSBC Brazil intranet.

10 Best Intranets: HSBC Bank Brazil

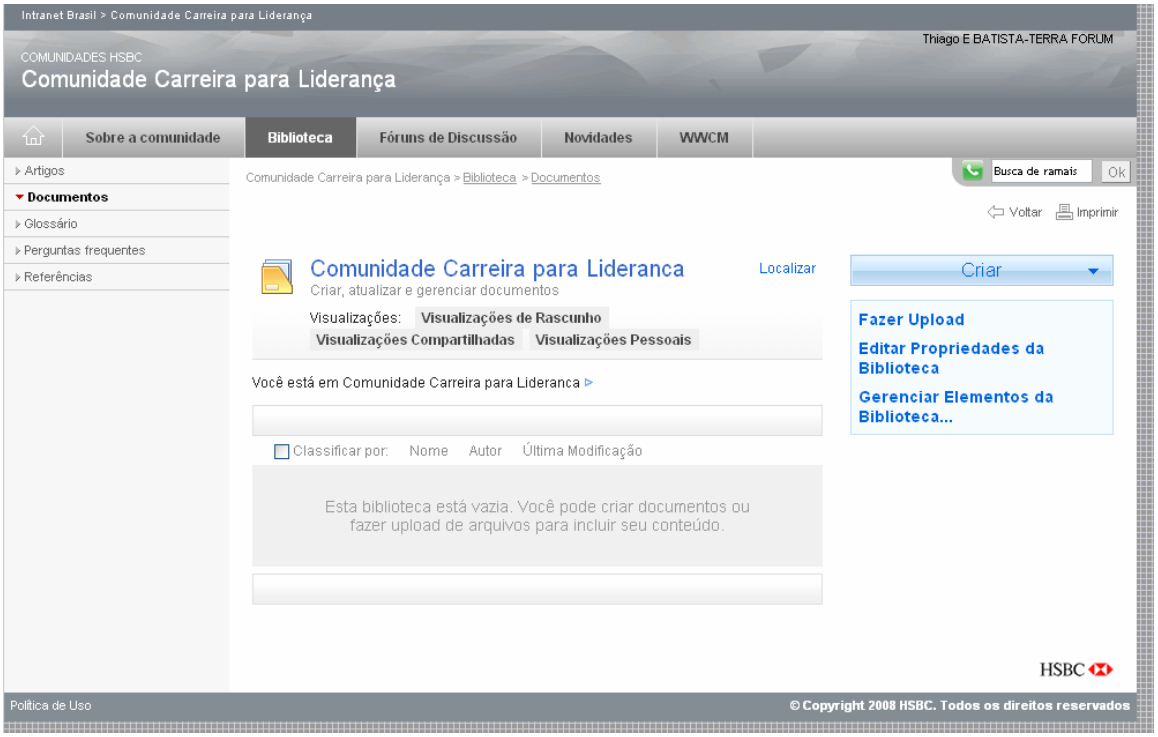


Pictured: The *About the community* (*Descrição da Comunidade*) page.

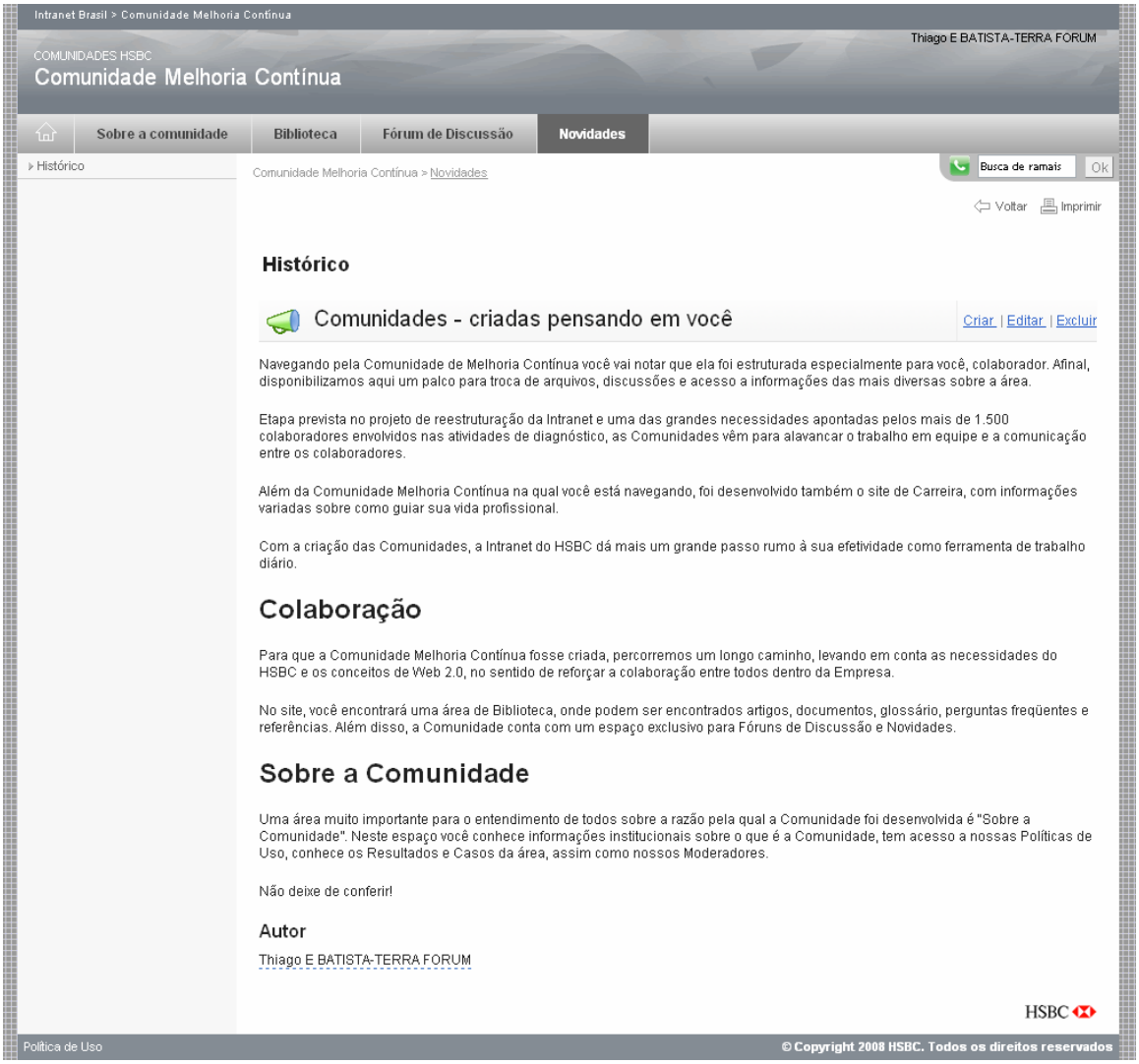


Pictured: The list of moderators for a community site.

10 Best Intranets: HSBC Bank Brazil



Pictured: The site's document library.



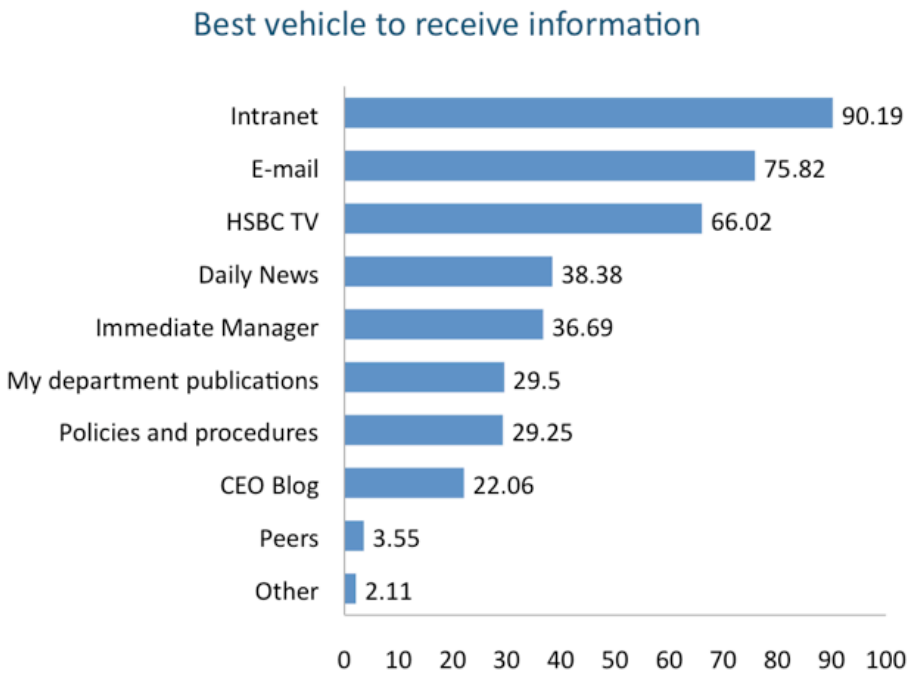
Pictured: The news section for an HSBC community.

RESULTS / ROI

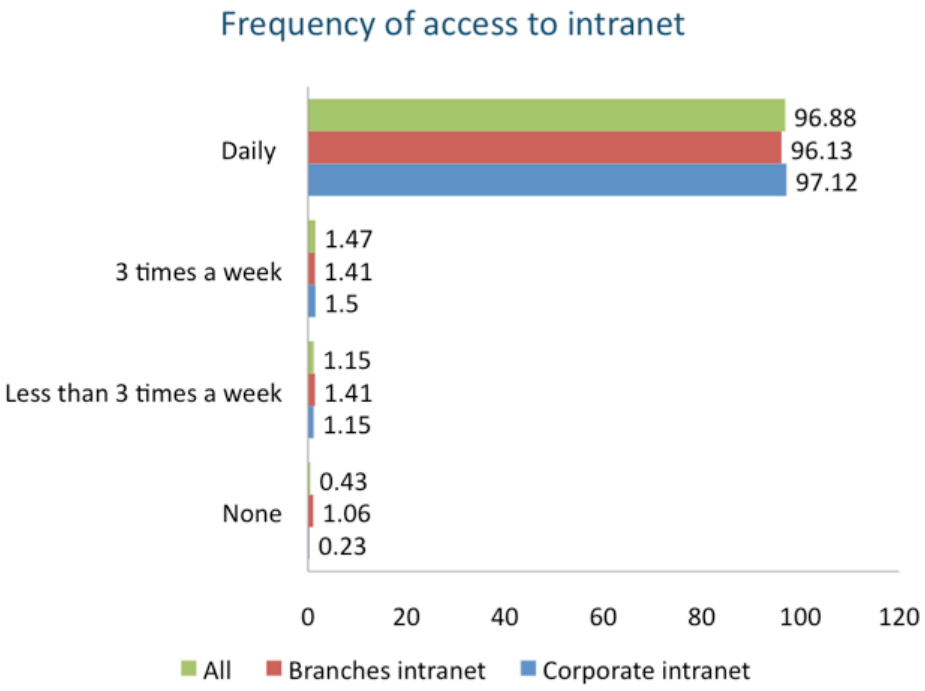
The intranet team can point to a number of important wins from the redesign project, but only a few are hard numbers. Many are important business improvements that reverberate across the organization and have an impact on the daily lives of the employees. Miranda cites the following as examples of these types of results:

- Intranet Brazil is the most accessed of the HSBC Group's intranets.
- The intranet's redesign project was awarded an internal prize, "Ouro da Casa," out of 20 competing projects. This prize is considered the most important project-recognition prize across HSBC Brazil.

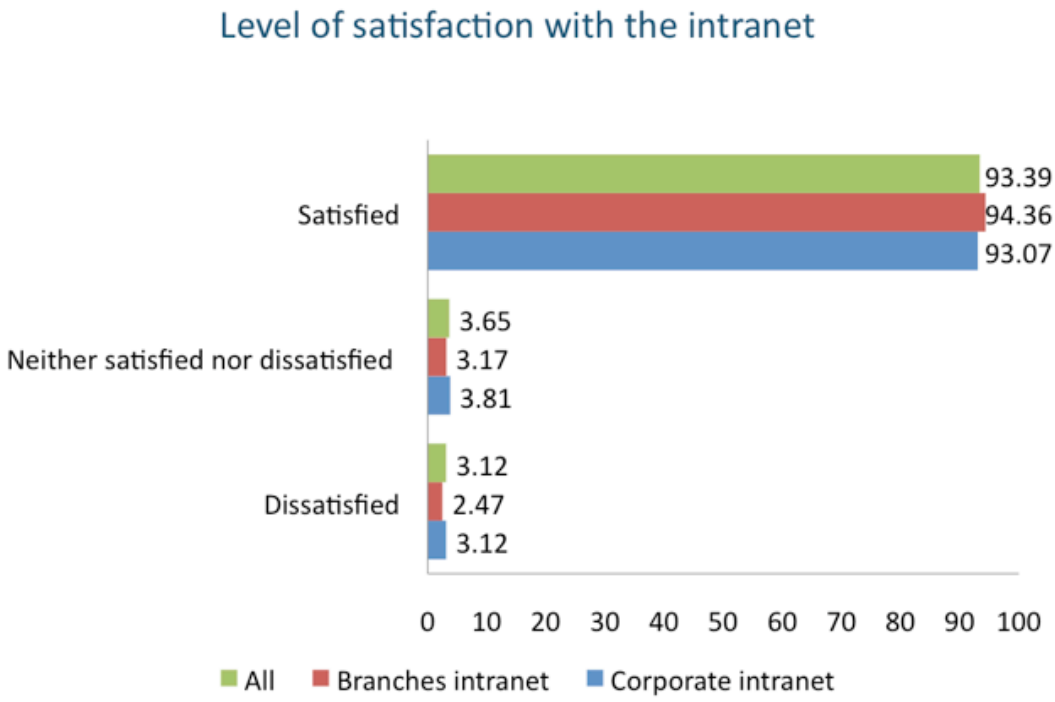
10 Best Intranets: HSBC Bank Brazil



Pictured: Results from a 2008 research study with more than 3,000 people across the organization. Of those surveyed, 90% considered the intranet the best vehicle for getting information about the company.



Pictured: More than 96% of employees surveyed access the intranet daily.



Pictured: The research study showed a 94% increase in user satisfaction for the intranet.

The intranet redesign has enabled users to:

- Easily access relevant information about HSBC's products (increasing the productivity of sales teams)
- Easily access automated HR services (increasing overall productivity of employees)
- Easily access automated administrative services
- Communicate more easily and effectively; all communication vehicles are consolidated on the intranet, including policies, standards, and governance
- Use the virtual communities to share ideas and communicate in a more effective way to solve problems and suggest improvements
- Share information via the departmental sites, which consolidate all the area communication on a single channel and thus improve productivity on users' day-by-day tasks
- Quickly access "what's going on" in the company (through news, corporate calendar, announcements, blogs, and so on)
- Readily access company history, vision, mission, objectives, and financial results

Although user comments are an anecdotal way to gauge success, taking the temperature of the organization can be a great way to see if the intranet is gaining a positive reputation among the users. "When we had implemented the first phase of the project, the CEO posted a topic on his blog communicating that launch," says Marques. "This post had more than 60 comments." Among those comments were the following:

"Congratulations to the implementation team! We believe that the intranet will be a big milestone on the corporate communication. I love the new layout and the new content."

"The new intranet is much attractive and much easier to navigate. Congratulations."

"Definitely the intranet will be an excellent tool to our day-by-day. It will be saving us a lot of time."

"We are better motivated when we know that our systems and tools are being constantly improved."

"Congratulations! The new intranet look and feel is great. I already thought the last one was very good and you accomplished something very difficult by improving something that is already very good."

Kaupthing Bank

Using the intranet

Kaupthing Bank is a Northern European bank offering integrated financial services to companies, institutional investors, and individuals. It is currently among the seven largest banks in the Nordic region in terms of market capitalization. The bank operates in 14 countries and employs more than 3,200 people worldwide (as of June 2008).

Headquarters: Reykjavík, Iceland

Number of employees the intranet supports: 3,207

Locations: The bank operates in the following locations: Iceland, the US, the UK, Isle of Man, Finland, Sweden, Norway, Denmark, Germany, Luxembourg, Belgium, Switzerland, United Arab Emirates (Dubai), Qatar

Annual sales: Kaupthing Bank has EURm 53,089 in assets (as of June 30, 2008)

Design team

Intranet team and Kaupthing's graphic designer.

Members

Global intranet team: Gudný Danivalsdóttir, intranet project manager and Web editor; Sigurjón Ólafsson, global webmaster; Björn Erlingur Flóki Björnsson, Web editor.

In-house support: Thór Snaer Sigurdsson, graphic designer; Kristín Benný Grétarsdóttir, webmaster–Iceland; Daníel Reynisson, team manager–IT; Bjarni Ólason, server admin–IT.

Contractors: The company's Web partners, Eskill Ltd., provided the CMS tool (LiSA) and technical consulting, as well as programmers for the project. Kaupthing also worked with SJÁ (www.sja.is), a usability consultancy, on usability testing and consulting.

Eskill Ltd: Hrefna Arnardóttir, programmer/project manager; Ágúst Valgeirsson, director of consulting.

SJÁ Ltd: Áslaug Fridriksdóttir, executive manager; Hólmfrídur Vilhjálmsdóttir, usability testing and consulting.

SUMMARY

Kaupthing Bank's intranet does a lovely job of balancing information from employees' professional and personal lives. Helpful business information and the opportunity to learn more about colleagues makes the intranet appealing, and demonstrates that the organization values employees as individuals, not just as workers. The designers of this intranet are not just highly talented; they are also empathetic. The intranet encompasses one of Kaupthing Bank's business principles of "fun and flair."

The homepage is chock-full of interesting stories related to work and life outside it. Images make these stories lively. The page also offers personalization and links to tools that people need to help get their jobs done efficiently.

Once logged in, the user is recognized, and various pieces of local information are served up on the homepage. The user's name appears in the upper right, along with a link to *Edit profile.*

A fun video features actor John Cleese expressing the Kaupthing Bank core principles. This banner area at the top of the homepage is generally reserved for videos or other animations to introduce a particular message to employees. Occasionally, the intranet team inserts an analogue clock Flash banner that shows the time in six cities, reminding people that they work for an international organization.

Below the banner, the *News and Announcements* section displays the three latest news items or announcements from headquarters and the local offices. The date is clearly expressed internationally, writing the month in letters. The headline itself is a link to the story, and is both succinct and informative. For example, the headline *Kaupthing Moves Up Top World Banks Ladder* offers clear information, not just a

teaser to grab your attention. Further, the short description exhibits good writing and tells the story's main points: That the bank is now 124th among the world's top banks, having moved up 18 places from its ranking in *The Banker* magazine's previous list. If people didn't have time to click though and read more, they'd get the story's key point from a glance at the homepage: that the bank has improved on its already high ranking.

Press Releases appear just below the news section. If a user works in a location that offers local news, those items display here in the *Local News* section; if not, the space displays shortcuts to interactive features on the intranet.

Farther down the center content area, *The Other Side of Employees* section highlights an interview with a company employee. The summary includes the employee's name, where that person is based, and a close-up photo. This is a great way for employees to get to know one another and see the rich background of people who make up their organization. The featured employee changes weekly; while not every employee can be interviewed, people from many areas of the organization are profiled throughout the year.

Intranet designers also elevate the most-visited intranet areas, displaying the eight most *Popular pages on the intranet.*

The *Photos from around the world* section on the bottom of the homepage is very popular. The *Event Photos* area shows images from work-related events—anything from a meeting to a fun, team-building event. The event's name (such as "Spring Festival") is a link listed below one of the images, and leads to more images.

The *Photos from employees* shows a photo, the name of the employee who submitted it, and the picture's title and location.

In addition to having interesting images, one thing that makes these and other photo features a success is that they change regularly. The team updates these images two or three times per week. Some weeks, however, have fewer events. Because designers wanted to avoid keeping outdated photos up, they added a *Do you know your colleagues?* section to run in lieu of event photos when necessary. This section introduces a few randomly chosen Kaupthing employees at a time, with a total of five to 10 appearing in the section each week.

On the homepage's left side, the global navigation offers links to the user's local network, stock price, and a promotional area for various items, such as photo contest deadlines. Finally, the page lists the names of employees celebrating a birthday, along with the flag of the country they work in and a link to send them a personal message.

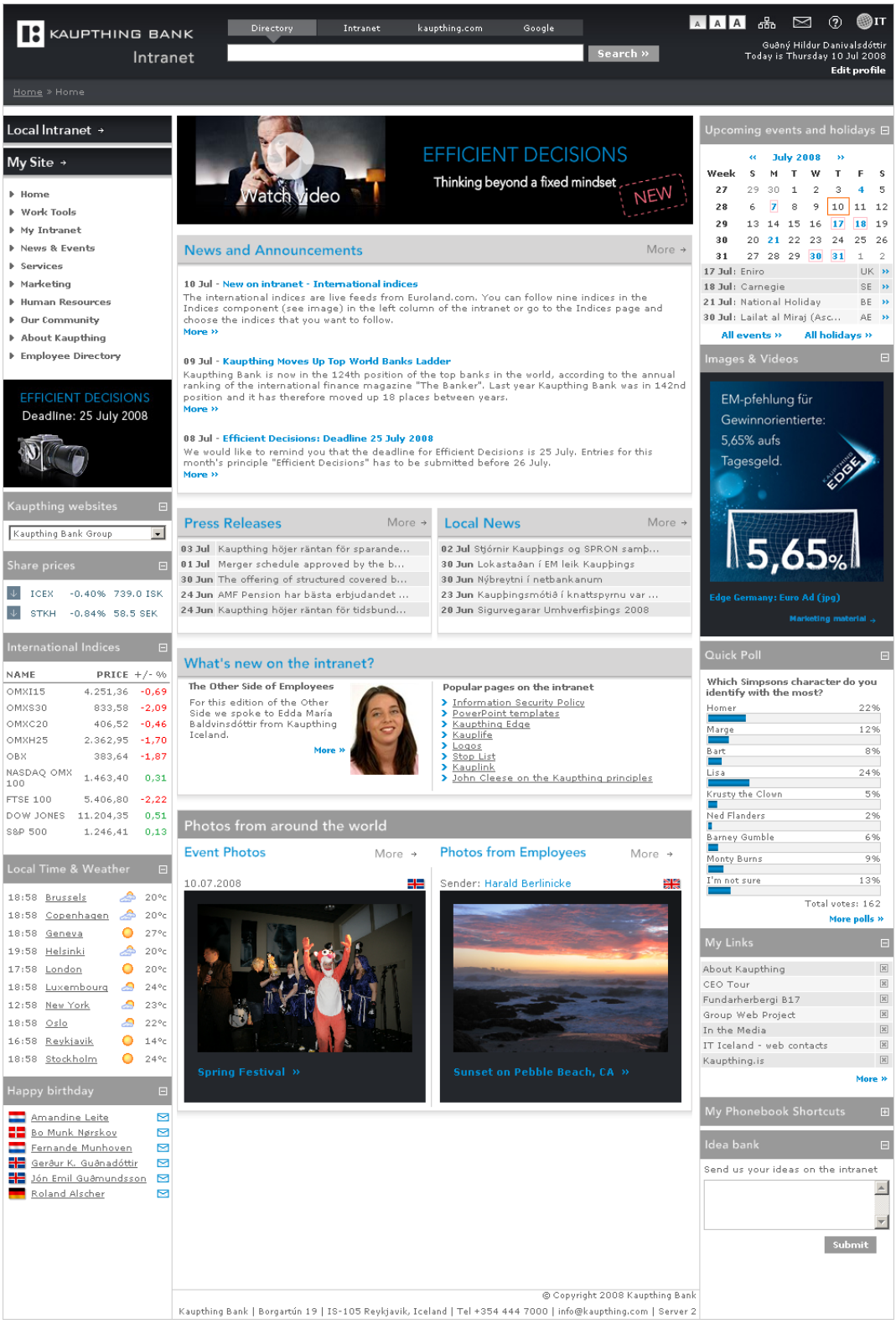
In the homepage's right column, the corporate calendar displays upcoming events and holidays. Below this is a link to the latest marketing material, images, and videos.

Every Monday, the intranet team updates the *Quick Poll.* This little survey gets people involved with various questions, whether controversial or benign. In one example, users were asked whether they use the "snooze" option on their alarm clock in the morning. (Most said yes, by the way.)

Users can add their own links to the *My Links* section. They can also create links to people that they want to call quickly via the *My Phonebook Shortcuts* section.

At the top of the page, users can access various search features. Icons in the upper right let them increase or decrease the text size—a nice accessibility feature. Users can also link to the site map, contact the webmaster, or get help on the intranet.

10 Best Intranets: Kaupthing Bank

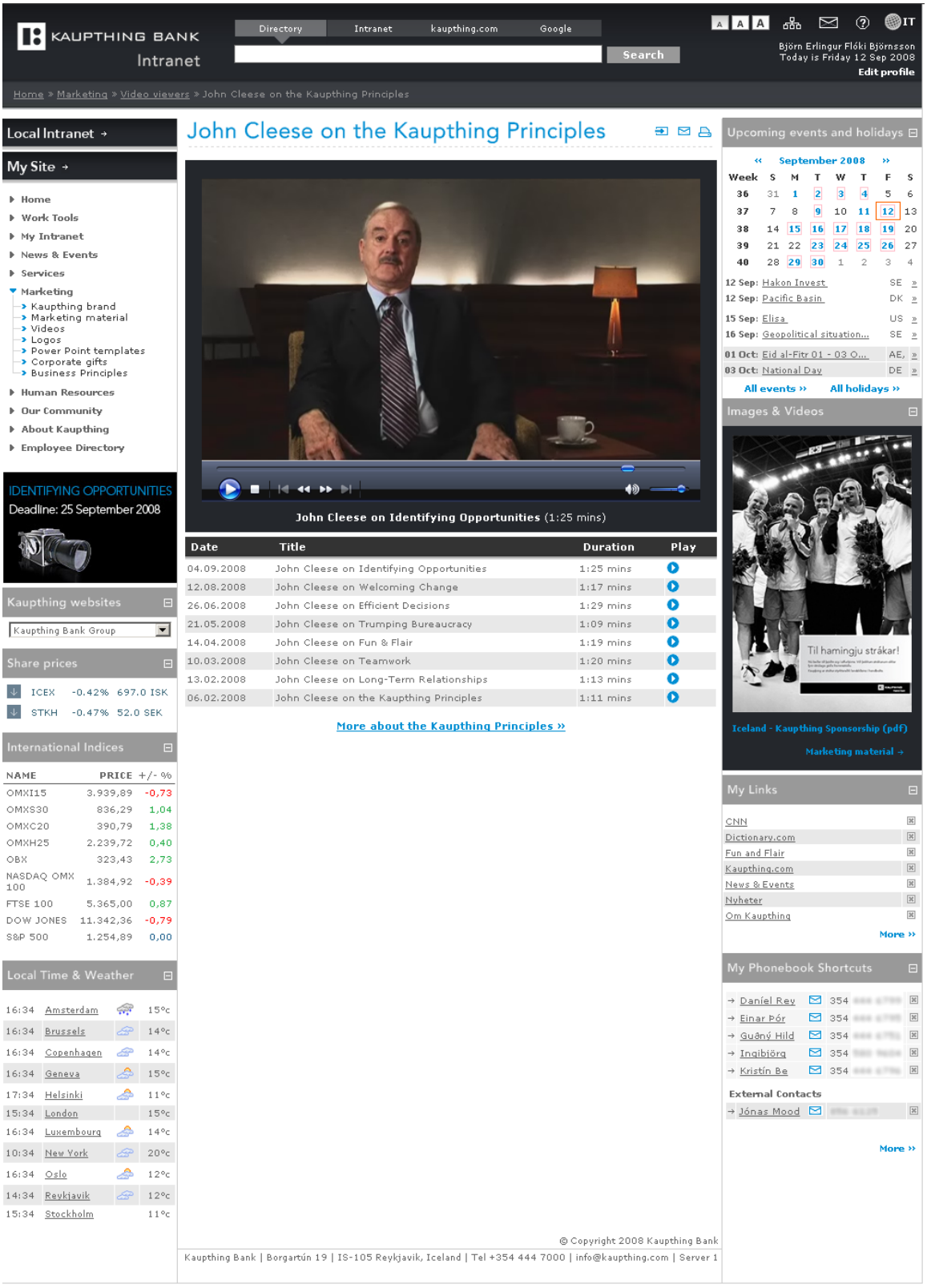


Pictured: The Kaupthing intranet homepage (shown here for an Icelandic user) offers news and links to business tools, plus articles and images that show the personal side of employees.

10 Best Intranets: Kaupthing Bank

The intranet's video viewer houses videos from the bank's marketing and other campaigns. Users can see the date, title, and duration of the videos before they choose to play them. Duration is a key component; users often look for short videos to watch. Also, video is a nice way to communicate with employees, and gives variety to the commonly used text and images.

10 Best Intranets: Kaupthing Bank

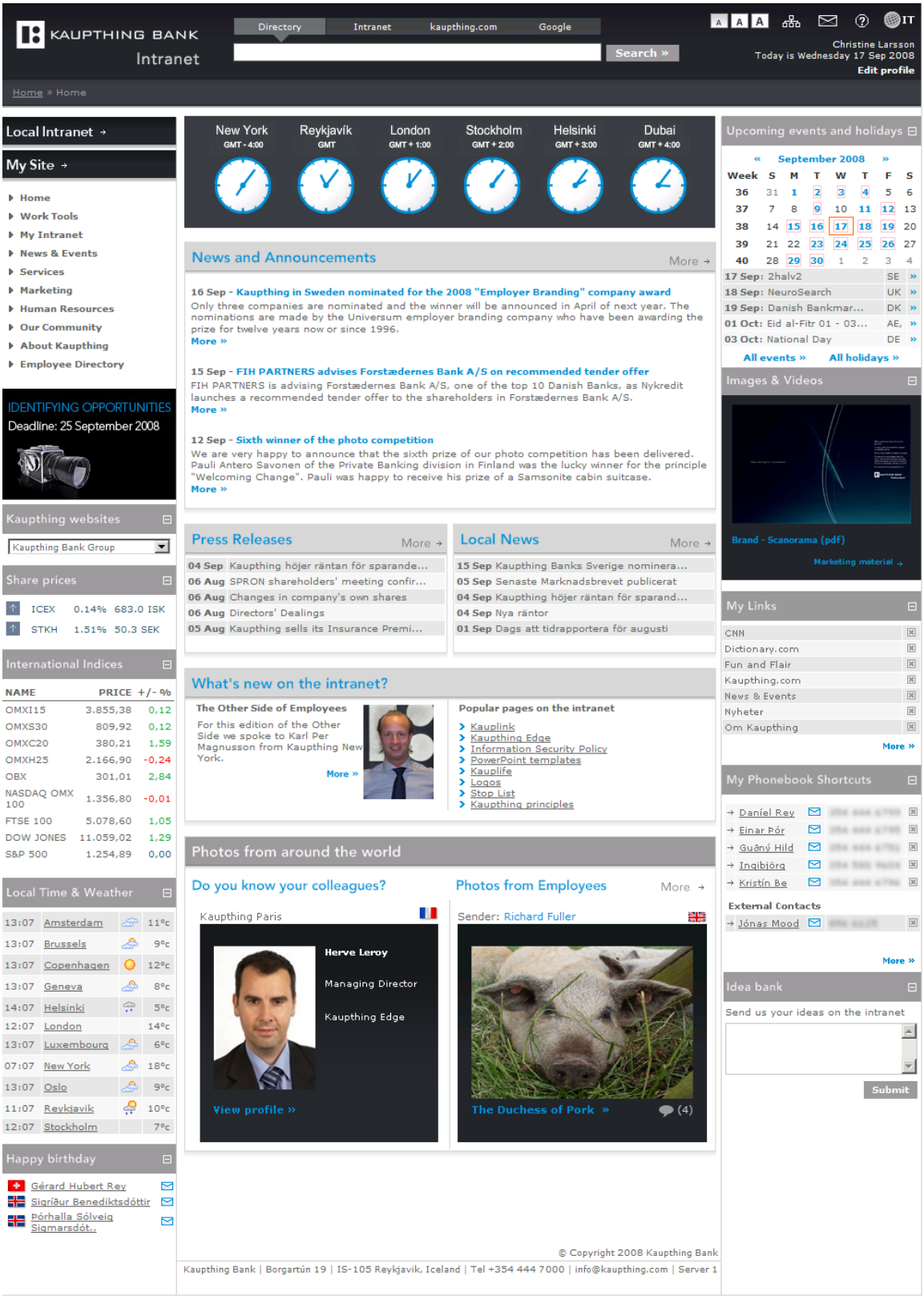


Pictured: On video pages, user can watch the video (pause, forward, and rewind) and also see other video titles and their corresponding durations.

10 Best Intranets: Kaupthing Bank

The homepage can look slightly different depending on the logged-in user's location. For example, the banner might change, and the local new areas might have different content. But overall, the intranets look about the same, creating a feeling of unity across the whole organization.

10 Best Intranets: Kaupthing Bank



Pictured: A Swedish user's homepage displays a few different items from those displayed for the Icelandic user.

10 Best Intranets: Kaupthing Bank

News writers are prolific at Kaupthing, and the intranet features much exciting news. And many articles are kept relatively short, to keep people's attention. Articles link to related websites and blogs. And good photos that accompany the stories bring them to life and give users another special perspective.

10 Best Intranets: Kaupthing Bank



Pictured: A news article describes how a Kaupthing employee and her husband are preparing for a charity event—running 125 miles in the Rocky Mountains in six days.

10 Best Intranets: Kaupthing Bank

Users can also blog on the intranet, so long as the posts aren't slanderous. Employees choose their own topics, and people have blogged about such things as news, business, work-related issues, sports, hobbies, and other personal interests.

10 Best Intranets: Kaupthing Bank

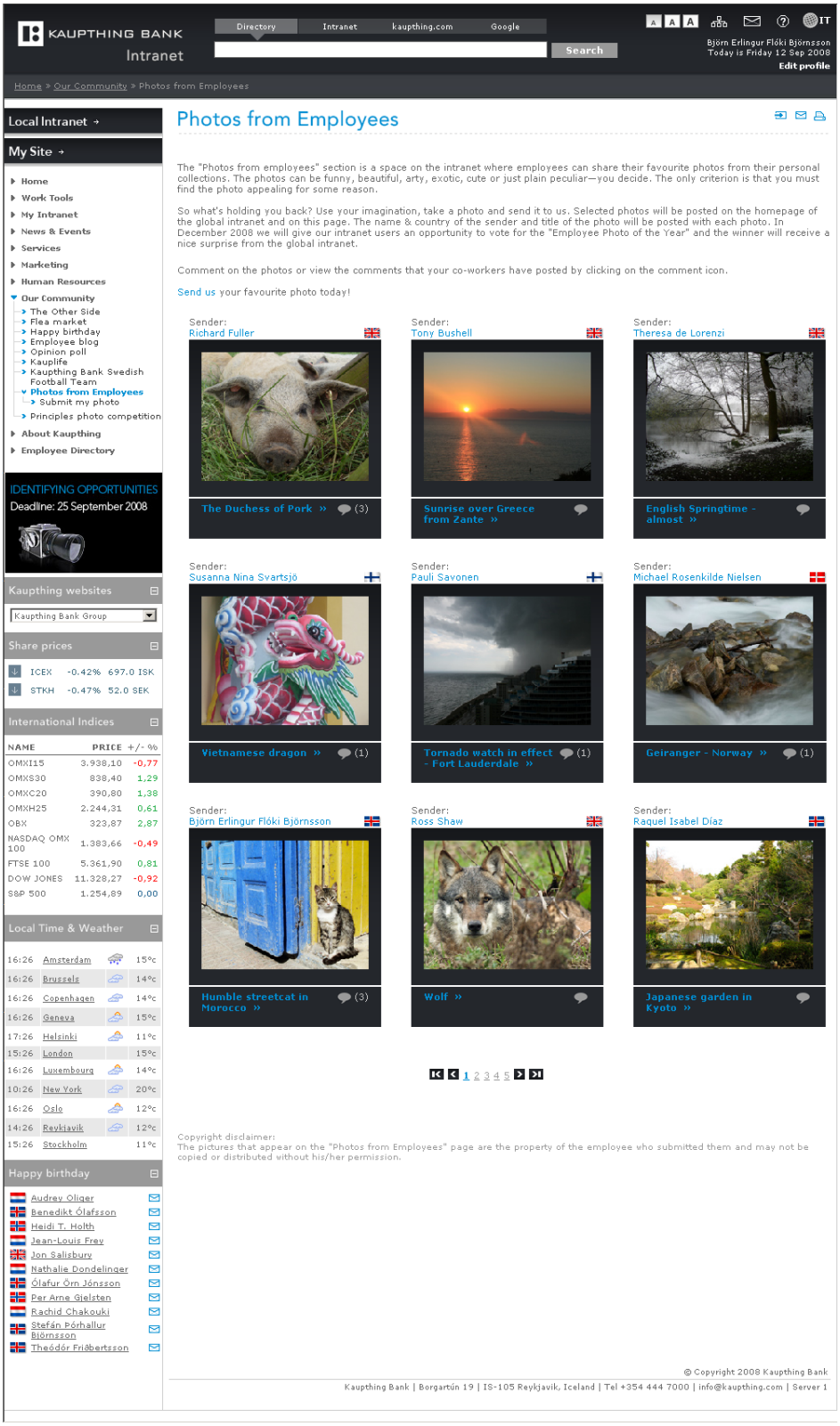


Pictured: Employees can blog about any topic they'd like, whether its work related or not.

10 Best Intranets: Kaupthing Bank

The *Photos from Employees* section is more than a single "photo of the day." Indeed, it offers a whole archive of photos, commemorating the organization's diversity. Users can scan though many photos from days past and, along with each photo, see the photographer's name and the photo's title.

10 Best Intranets: Kaupthing Bank

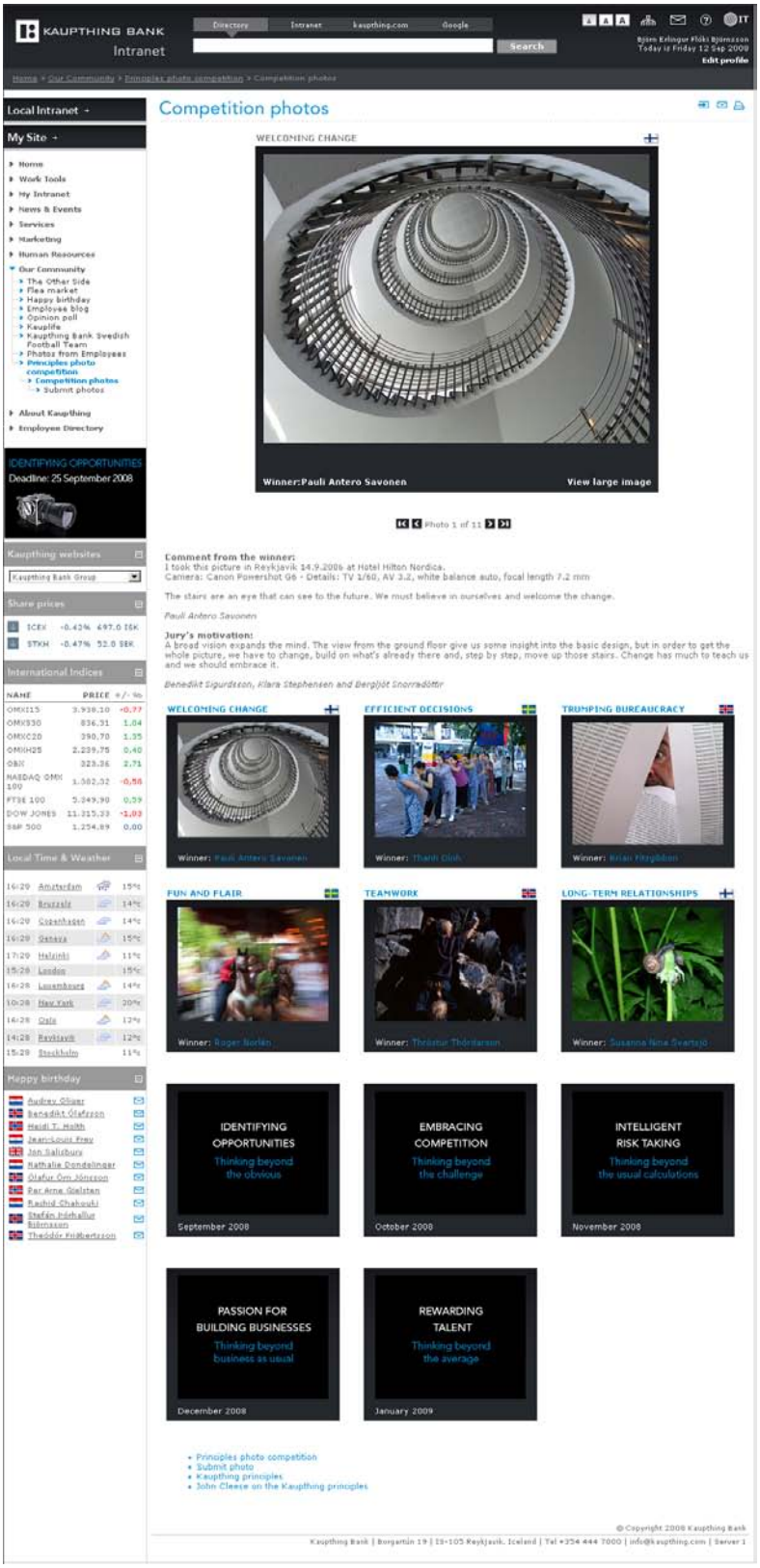


Pictured: The employee photo gallery helps show the diversity of the employees' lives.

10 Best Intranets: Kaupthing Bank

Because Kaupthing employees showed a great interest in photos, the bank started a photo competition around the theme of its corporate principles. Each part of the contest is meant to demonstrate one corporate principle. The winner of each can choose a prize, ranging from an iPod to a portable DVD player. In February 2009, employees will vote for the one picture they feel is the most effective representation of one of the Kaupthing principles. The final winner will get a round-trip airline ticket for two to a European destination of his/her choice. This contest is a great way to get many people involved and thinking about what the bank stands for philosophically.

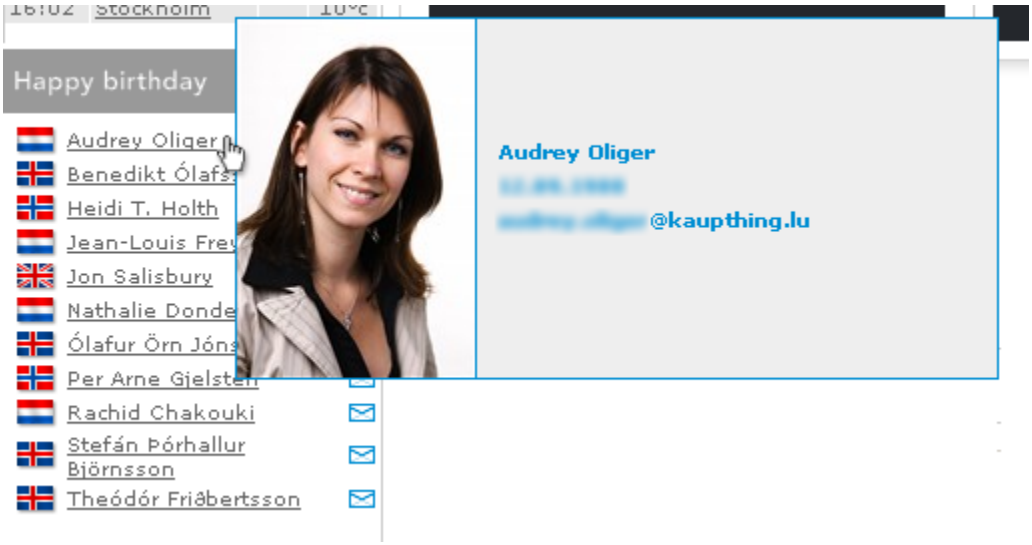
10 Best Intranets: Kaupthing Bank



Pictured: Entries in the photo competition are meant to demonstrate the company principles.

10 Best Intranets: Kaupthing Bank

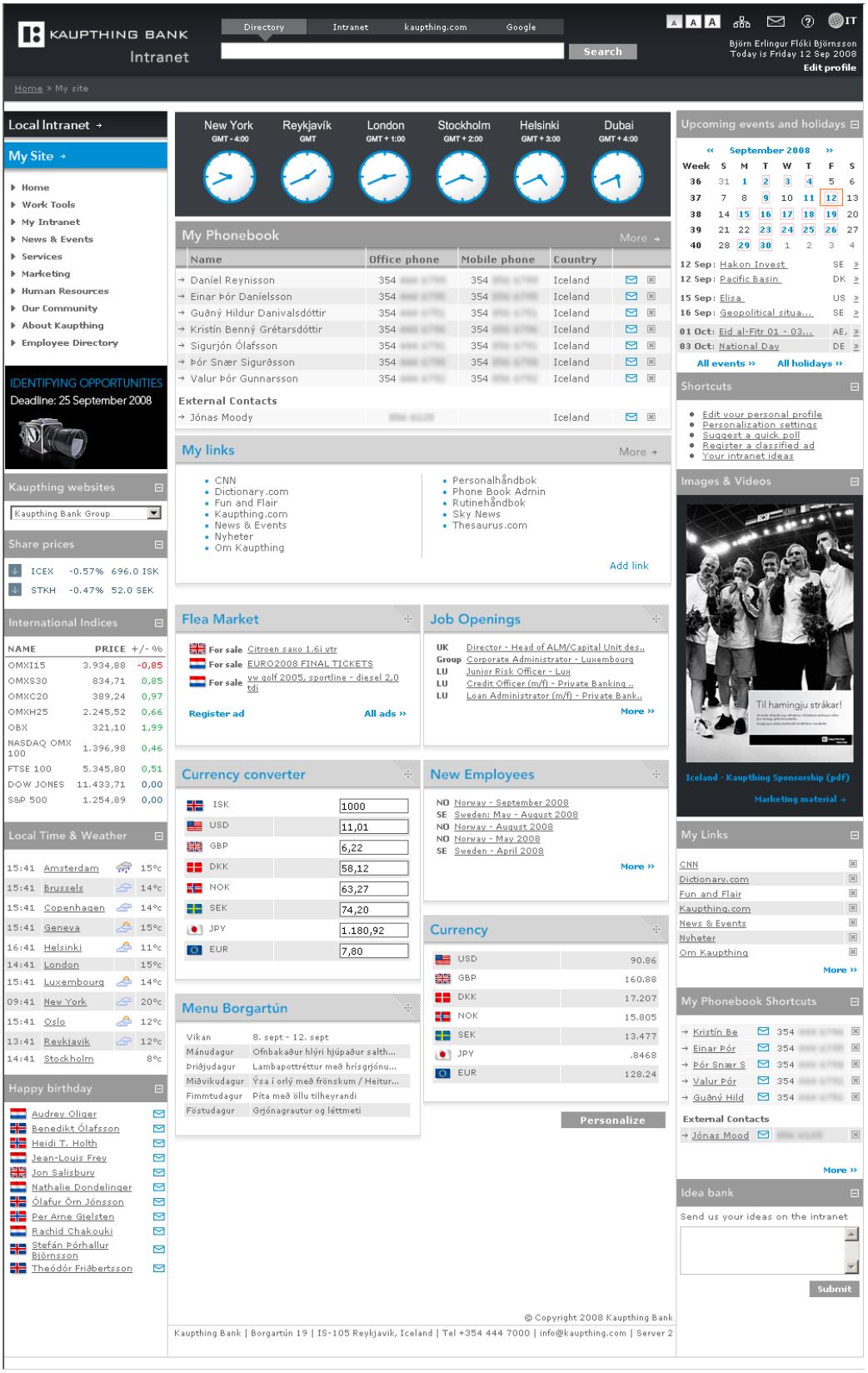
It's certainly nice to be wished happy birthday. On the Kaupthing homepage, users can mouse-over a birthday person's name and see his or her picture, telephone number, and e-mail address. This is a nice way to make people feel special and appreciated.



Pictured: Mousing over the name of someone celebrating a birthday shows that person's name and contact information.

To choose the information and tools that are right for them, users can edit the intranet's *My Site* section, adding or removing components depending on their interest. They can also rearrange the page by dragging items around as they see fit.

10 Best Intranets: Kaupthing Bank

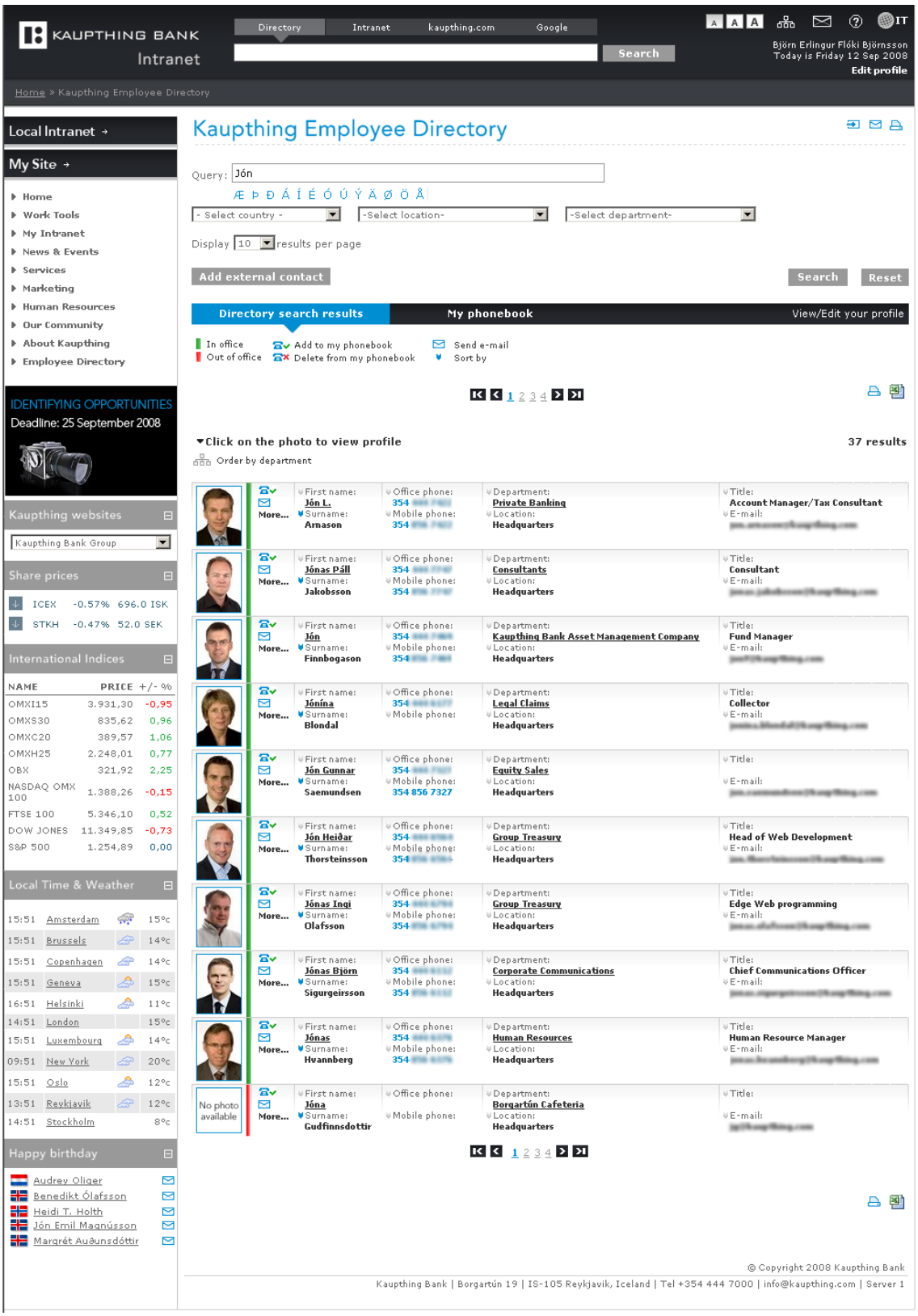


Pictured: Users can customize the *My Site* area as they please.

10 Best Intranets: Kaupthing Bank

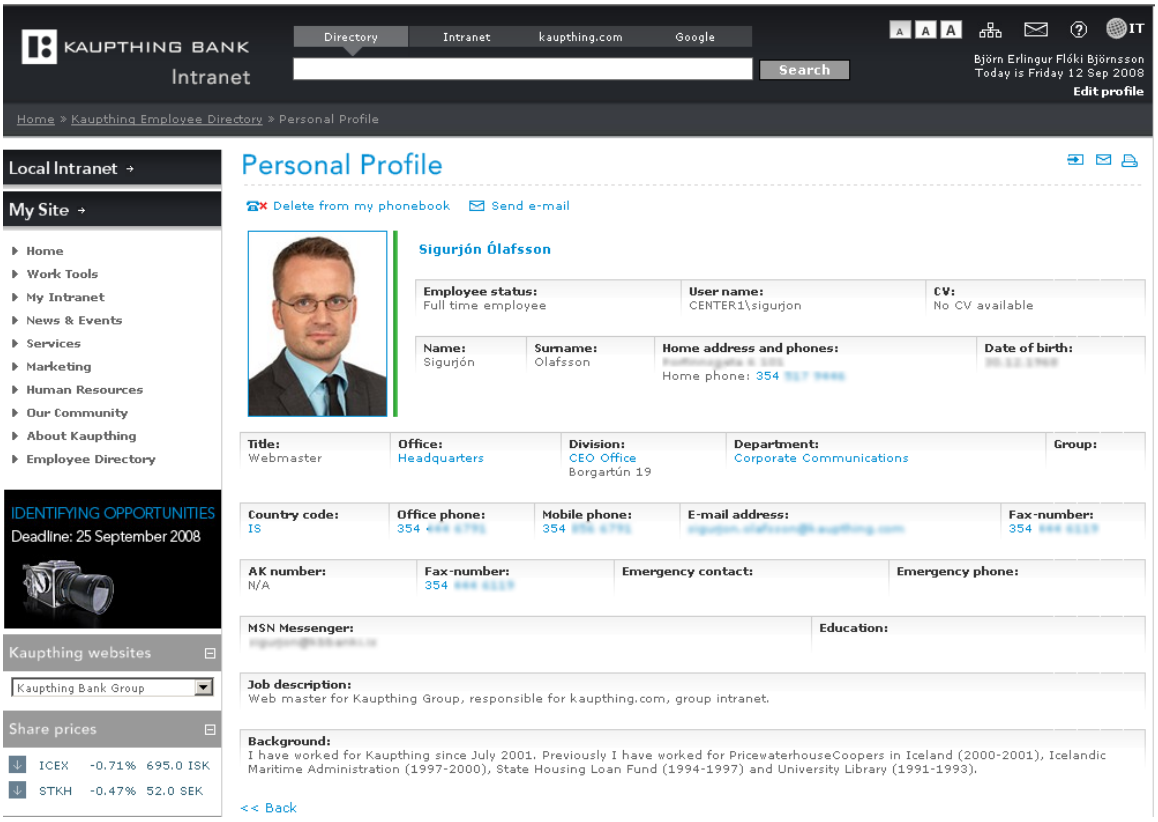
The employee search results page is very helpful and modern, displaying the basic information people need without their having to open the profile document. The information is quite legible, even though a lot of it is condensed in a small space. Even a small, but clear picture of the person shows up in the results. Also, for employees in Iceland, the green bar to the right of the photo shows that they're in the office, while a red bar shows that they're out.

10 Best Intranets: Kaupthing Bank



Pictured: Basic information about people and even a small picture shows up in the search results.

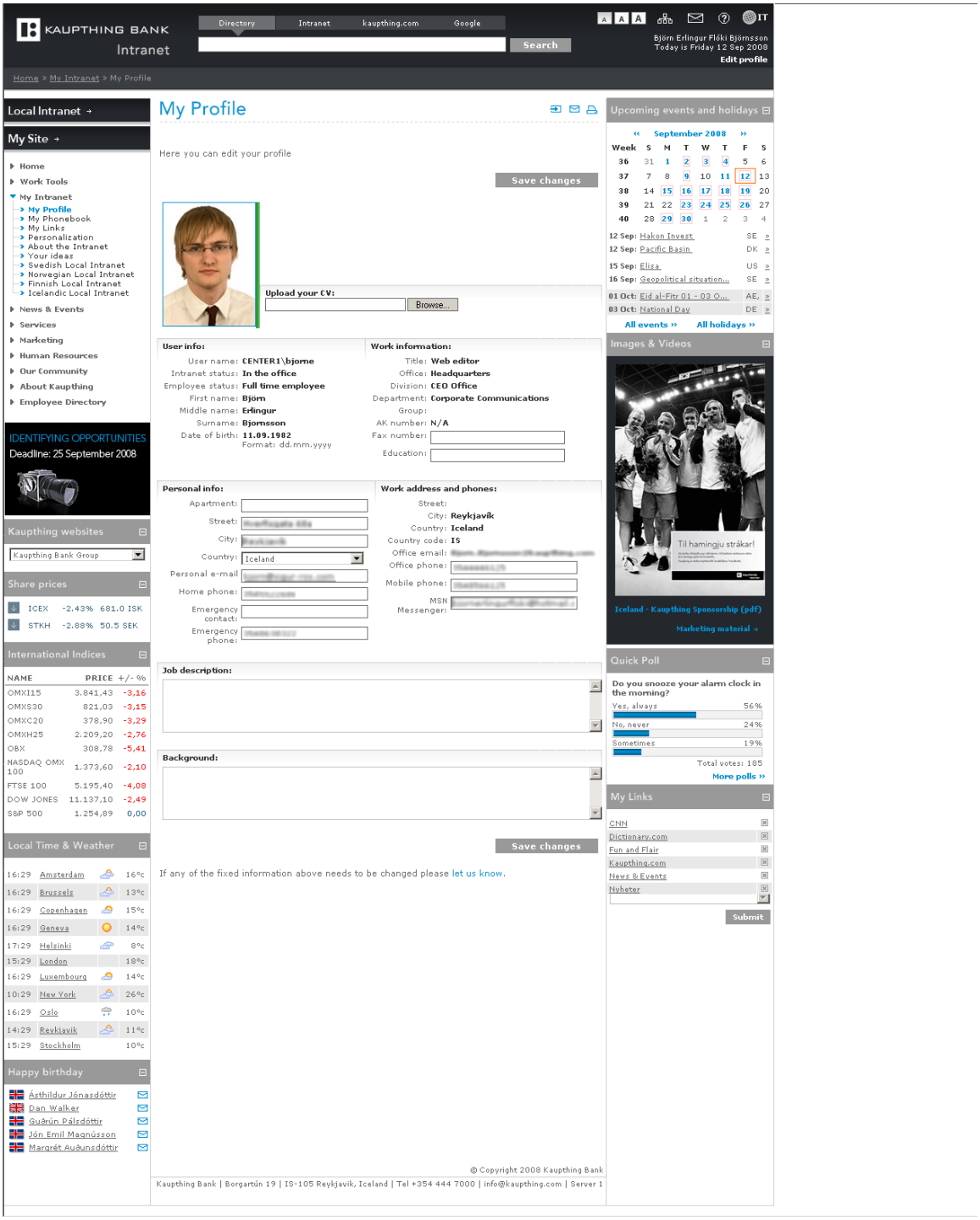
Clicking through to the personal profile gives users all the typical details, a nice photo, and a longer background section provided by the profiled employee. For Icelandic employees, the profile also shows whether the user is in or out of the office.



Pictured: The personal profile page is partially auto-filled and partially filled in by the profiled employee.

Clicking the *Edit profile* link in the upper right opens the logged-in user's profile form. Notice that the top section, *User Info*, is not available for edit by the user. Users can submit changes to this information by clicking the *Let us* know link on the page. In contrast, users can edit the lower sections—*Personal info*, *Job description*, and *background*—on the spot. This lets employees share information about themselves with their co-workers, and is another way in which this intranet takes a more personal approach than just business as usual.

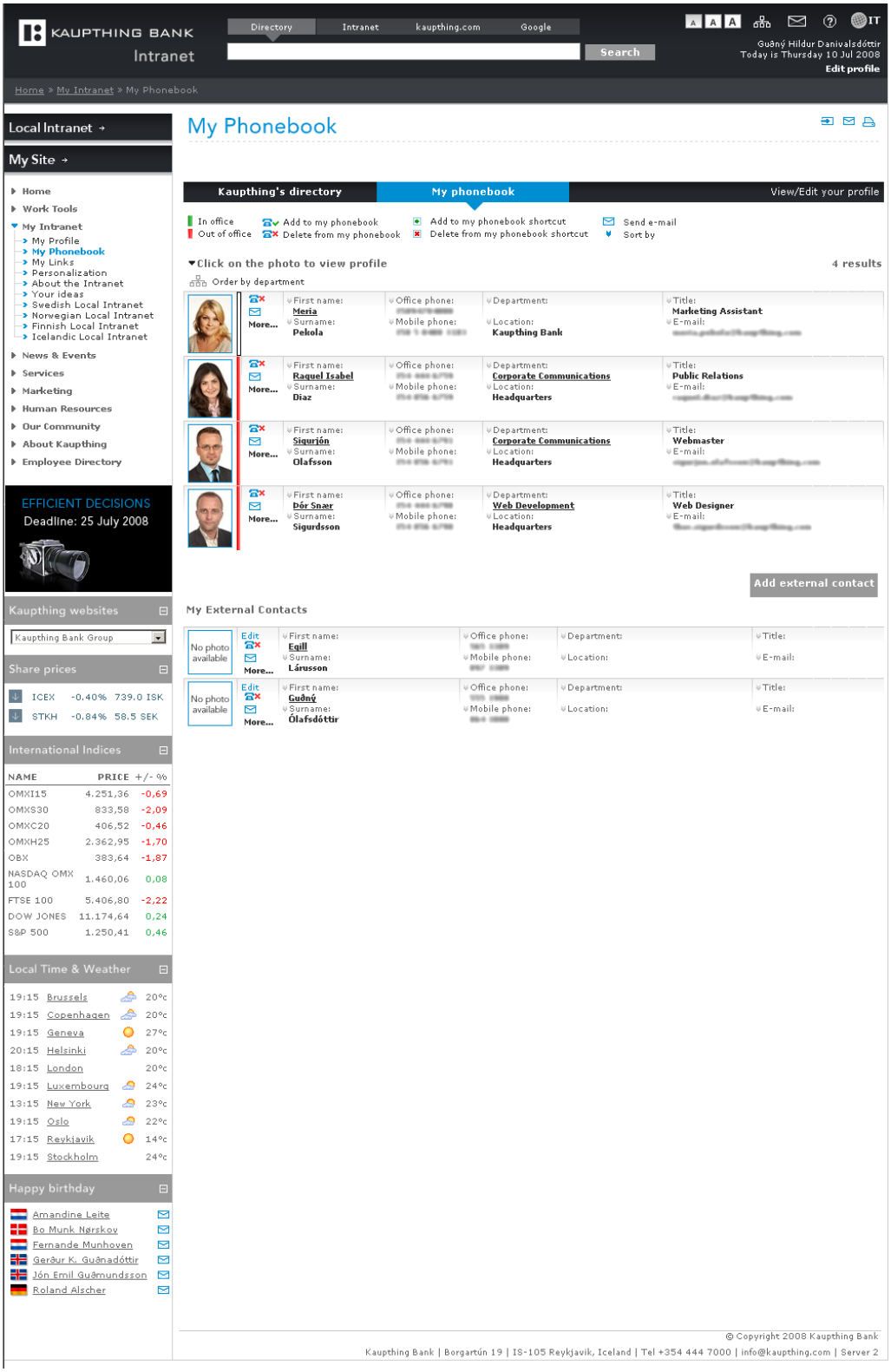
10 Best Intranets: Kaupthing Bank



Pictured: Users can edit the personal information in their profile and send a message to have other information changed as needed.

Under *My Intranet*, the users *My Phonebook* can store information about other employees, as well as people who don't work at Kaupthing Bank. Co-workers appear in the top section, and people who don't work at the bank appear under the *My External Contacts* section. Users can easily add profiles by clicking the *Add to my phonebook* link.

10 Best Intranets: Kaupthing Bank

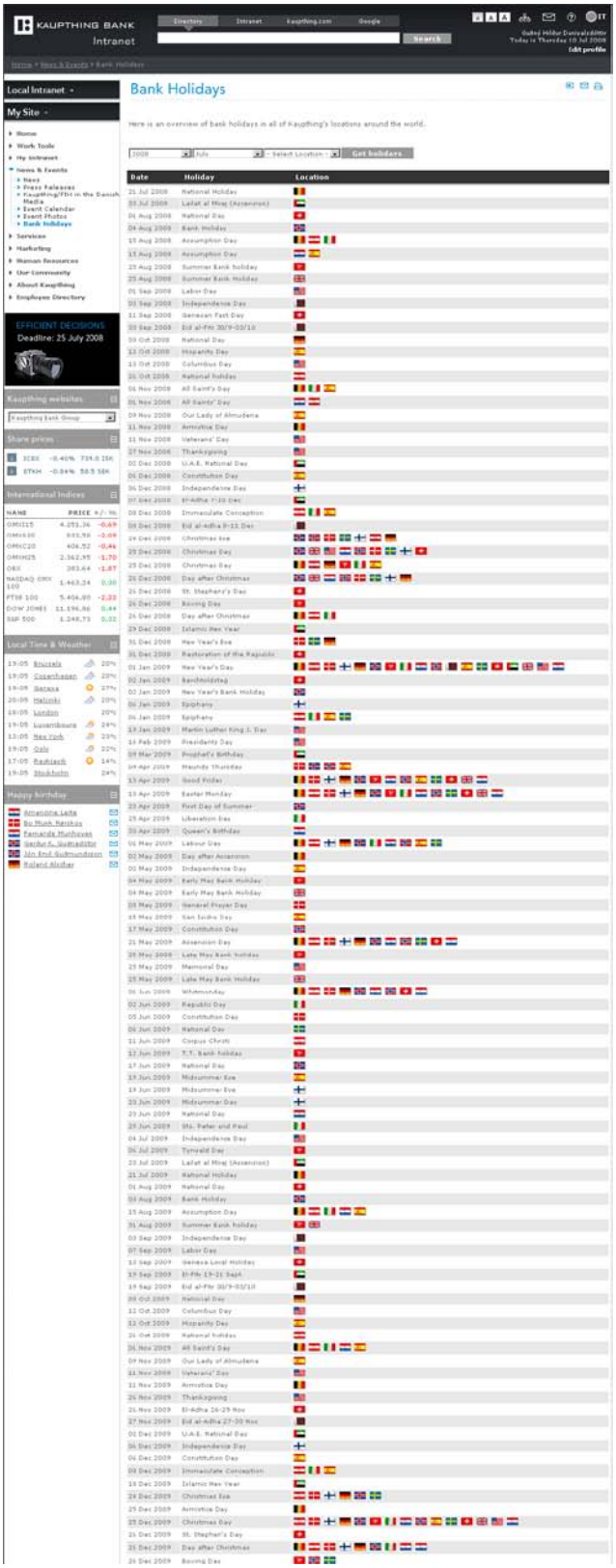


Pictured: Users can store phone directory entries for people both inside and outside the organization.

10 Best Intranets: Kaupthing Bank

Another somewhat personal element on the intranet is the reminder of bank holidays—that is, the days employees have off. The holidays are listed in chronological order. The listing includes the holiday's name and the flag of the countries that celebrate it (and thus close their banks that day). Users can also sort the list by criteria other than date, such as location.

10 Best Intranets: Kaupthing Bank

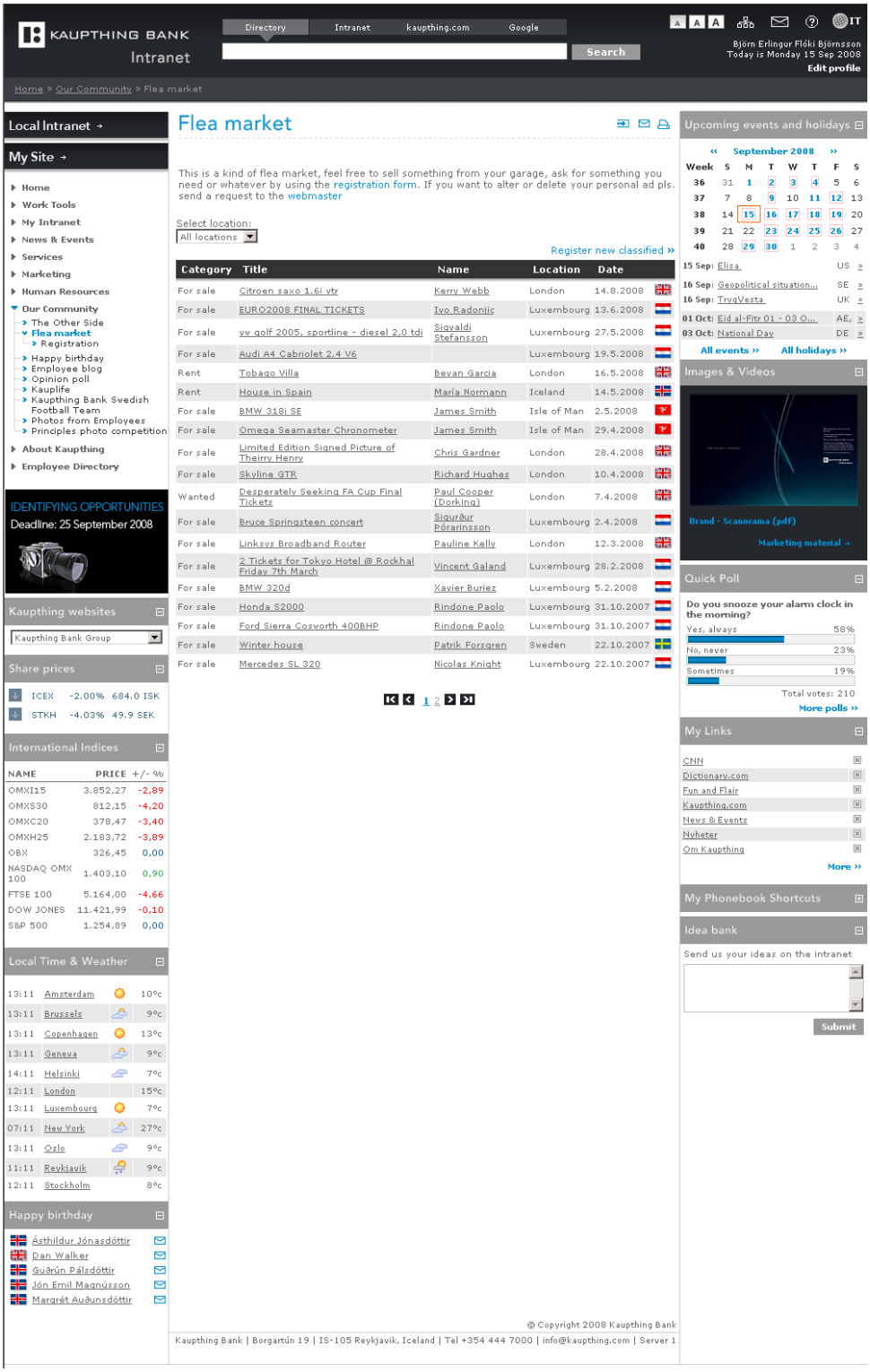


Pictured: Bank holidays are listed with the date and flags of the countries that celebrate them, indicating which employees get the day off.

10 Best Intranets: Kaupthing Bank

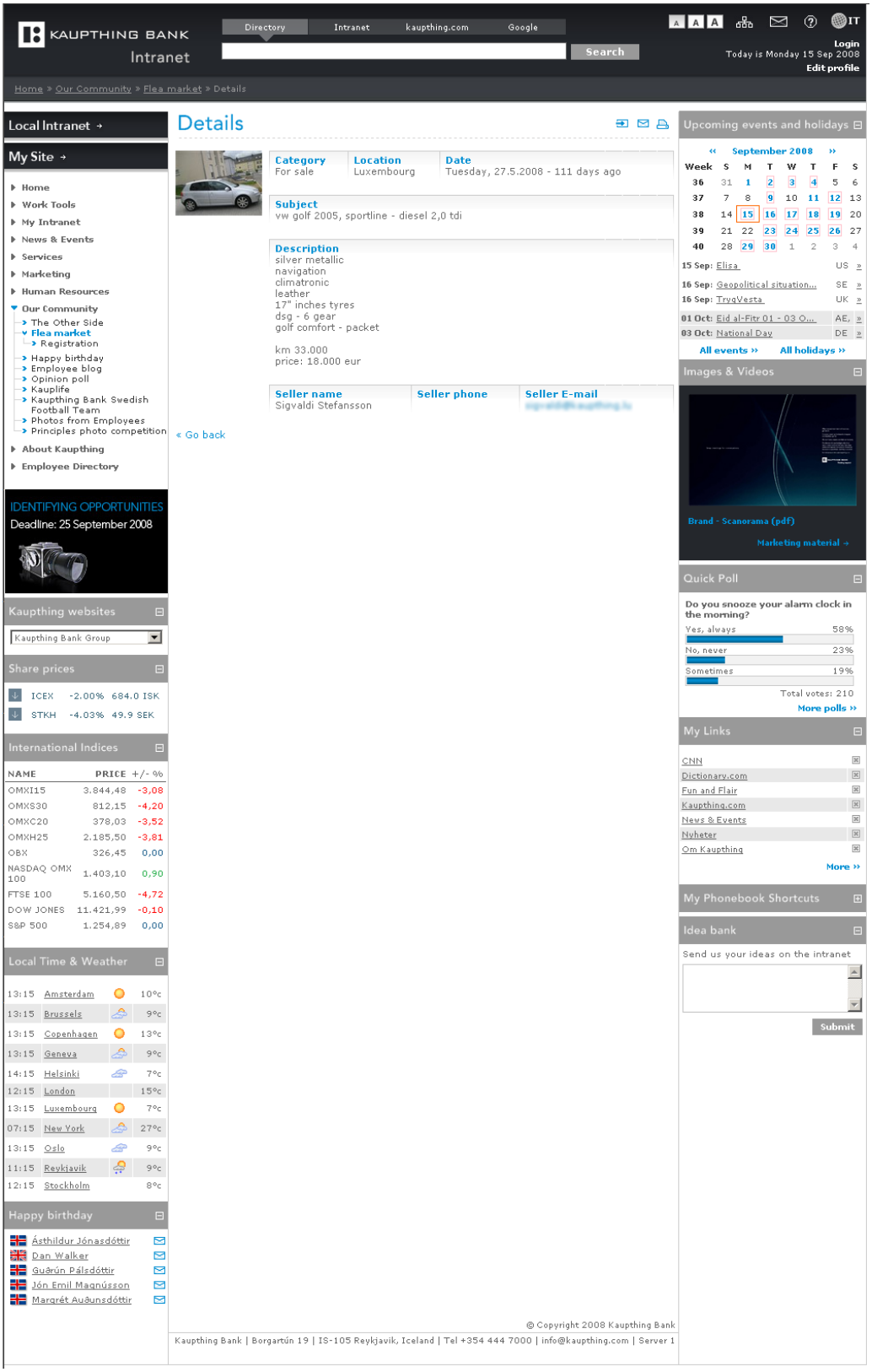
A *Flea Market* page lets users buy and sell items with their colleagues. Users can choose a category for the item, the location, subject, date, and description. An optional photograph can help make a sale.

10 Best Intranets: Kaupthing Bank



Pictured: The intranet sports its own online international *Flea Market* where Kaupthing employees can buy or sell anything they wish. The *Flea Market* page lists all classified ads posted; each is marked with the flag of the country it comes from. Users can browse ads by country or select "all locations" to view all entries.

10 Best Intranets: Kaupthing Bank



Pictured: A *Flea Market* feature lets users buy and sell items with their colleagues.

The Bank's investment in work tools and communication is matched by its commitment to respect and embrace all employees on a more personal level. The intranet designers were able to do this effectively, offering interactive features and good content about people without overdoing it or making it seem forced. This strong emphasis on employees "after hours" shows that the organization gives reverence to the human being inside and outside of the office.

BACKGROUND

Global Intranet 1.0

Kaupthing Bank launched its first global intranet on November 17, 2005. Since its inception, the global intranet has played a key role in the bank's corporate communications. It brings together the entire organization, uniting 14 offices around the globe into a single forum.

That kind of broad initiative was possible because of the project's strong backing from the highest ranks of the company. "From the very beginning, the intranet project enjoyed very strong backing from the CEO, Hreidar Már Sigurdsson," says Sigurjón Ólafsson, Kaupthing webmaster. "Which enabled the intranet team at that time to access all the resources needed to reach the optimistic goal of setting up an intranet in such a tight timeframe [four months]."

The company's leaders backed a global intranet initiative because of the value they placed on the intranet as a communication vehicle. The CEO addressed users on the new intranet in a welcome video, where he said: "The Kaupthing Bank global intranet plays a key role in the bank's corporate communications…. It is my belief that this intranet serves as an effective tool to hone our communication network and further establish the culture of Kaupthing."

In the beginning, the global intranet was only a default page for offices that lacked their own local intranet. Over time, the company has reached its goal of having the global intranet be the default start page for all Kaupthing offices.

An important milestone in the site's development was the addition of a Web editor/project manager in spring 2006. This person was hired to help make the intranet a top priority. "Since then, we have seen a continuous evolution, with frequent updates and new features," says Ólafsson. "We have also sought feedback from users in an intranet survey conducted in November 2006."

Global Intranet 2.0

The intranet project was initiated in 2007 along with a new corporate brand identity that applied to new external websites and new marketing materials for the bank. This project resulted in the site redesign that is discussed here. It launched on January 21, 2008.

Along with the global intranet re-branding, four re-branded local intranets were launched simultaneously in Iceland, Sweden, Finland, and Norway.

The redesigned intranet included the same main sections and main functions, but various new features were added, including:

- ***My Site*.** All personalization is aggregated on this one page.
- **Employee directory.** Users can add external contacts to their phonebook and use a page selector to move to the page number they prefer in the search results.

- **Local news box.** Users who have local intranets (Iceland, Sweden, Finland and Norway) can follow their local intranet news through the global intranet.
- ***Photos from Employees*.** Employees can share favorite photos from their personal collections with other Kaupthing employees around the globe.
- **Personalization.** Users can edit their profiles, choose personalization settings, create their phonebook, and collect links.
- **Interactivity.** Users can suggest a news article, add an event, suggest a poll, register a classified ad, send suggestions to the intranet team, and so on.
- ***Happy Birthday*.** Pop-up and mouse-over name cards on the homepage offer a daily list of employees who are having a birthday.
- **World map.** Users can zoom in and click on links to get information about all of the Kaupthing offices.
- **Live analog clocks.** The clocks give users a simultaneous view of the time in six cities (in all Kaupthing office time zones), displaying the time differences between the cities. Users can move the mouse over the clocks to see the time in digital format.
- **Employee blog.** Blogs offer a venue for employees to express themselves and interact with their colleagues. Employees choose the topics and all comments are attributed to the blog owner.
- ***Do you know your colleagues?*** Every week, five employees are chosen randomly to appear in this section. The idea is to introduce all of Kaupthing's employees around the globe on the intranet.
- **Kaupthing's principles photo competition.** A photo contest for Kaupthing employees includes 11 separate themes based on each of Kaupthing's 11 business principles. The winning photo for each theme is posted on the intranet and the winner can choose a prize.
- **Internal marketing.** In this series of videos made specifically for the bank's employees**,** John Cleese introduces Kaupthing's core principles.

INTRANET TEAM

The intranet team is in Corporate Communications, which is part of the CEO Office. Placement within that department has had a positive impact on the site's development because the team has always been able to rely on top-tier management for support. "It has been very important for the development of the intranet to be part of Corporate Communications, enjoying 100% support from executive management," says Ólafsson.

When the site launched in 2005, Corporate Communications had only one Web employee who was responsible for both the external websites and the global intranet. In 2006, the company hired a Web editor whose main responsibility was the intranet. The Web team currently consists of three full-time employees who share responsibilities among websites, the intranet, and other Web-related projects, such as HTML newsletters. Only one of the three people's time is fully allocated to the intranet.

The three roles that are supported internally are intranet project manager/Web editor, webmaster, and Web editor. The team also has a translator who proofreads all news and copy published on the intranet. The bank's IT department runs the websites and acts as a project manager for the programming, which is nearly all outsourced to an agency, Eskill.

The core team has access to two to three external programmers and a graphic designer in the Marketing department who serve as supplemental resources.



Pictured: (back row, left to right) Daníel Reynisson, team manager–IT; Björn Erlingur Flóki Björnsson, Web editor; Sigurjón Ólafsson, webmaster–Global; Thór Snaer Sigurdsson, graphic designer. (Front row, left to right) Gudný Danivalsdóttir, intranet project manager and Web editor; Kristín Benný Grétarsdóttir, webmaster–Iceland; Hrefna Arnardóttir, programmer/project manager–Eskill.

Working with Agencies

Because the core intranet team is so small, they rely on outside agencies to execute various components of intranet projects, especially in the areas of programming and usability. That was the case for both the initial launch in 2005 and, to a lesser extent, the 2007/2008 redesign project. Expanding the Web team from one person to three between those releases enabled them to take on more of the work in-house.

For the initial site release in 2005, the bank worked with a variety of outside vendors. Initial site planning was done internally (need analysis and wireframes), and two outside consultants were called in—one to consult on technical issues, and one to manage the overall project and interface with Ólafsson. Two freelance graphic designers were contracted to create design proposals for the site.

During the 2007/2008 redesign project, the team worked closely with an agency, Eskill, to do the programming, while another agency, SJÁ conducted the usability

test sessions. For this project, the in-house graphic designer, Thór Snaer, created the new design to align with the new Kaupthing brand identity; the project was also managed internally.

For the Kaupthing team, agencies have become an integral and valuable component of the process. "Working with agencies, which we actually also look on as partners, has been very fruitful in both of the aforementioned intranet projects," says Ólafsson.

"Eskill has not only executed our ideas, but also come up with many technical solutions and ideas, and acted as a consultant throughout the projects. Working closely with Web usability consultants has also made a difference and certainly improved usability."

GOALS AND CONSTRAINTS

Goals

While the primary driver of the redesign was to align the site with the bank's new brand identity, the team also wanted to make some needed improvements to the site's features and functionality. "At the same time, we wanted to improve key features of the intranet, add new features, meet requirements and ideas we had received from users, and generally make the intranet more interesting for Kaupthing employees," says Gudný Danivalsdóttir, intranet project manager and Web editor. Another objective of the redesign was to offer more fun and usable features to draw people to the site. "We increased interactivity, personalization, and usability, and implemented Web 2.0 to some extent on the intranet by encouraging employees participation, contributions, communication, communities, and visibility," she says.

They accomplished these goals with features such as employee blogs, *Photos from Employees*, the business-principle photo competition, and the *Do you know your colleagues?* feature. Currently, the team is working on directory improvements, including Ajax search and additional advanced search options.

Danivalsdóttir says that goals for the company's intranet include:

- Create an engaging homepage with dynamic content to encourage daily use
- Centralize company information and internal announcements
- Enhance channels for corporate communications already in place
- Strengthen the corporate culture by increasing internal marketing and awareness of business principles
- Offer useful information and tools
- Create fun features to draw people to the intranet
- Offer interactivity and opportunities for involvement

Constraints

"The main constraint we faced in the redesign process was adjusting the functions and design to different browser types," says Danivalsdóttir. Most Kaupthing employees still have Internet Explorer 6 as their default browser, but some already have IE7 and most will upgrade to it soon. "Since programmers prefer to work in Firefox and IE7, they had to fix all the design and functions for IE6," she says.

"The difference between Firefox and IE7 is minimal, but the difference between IE7 and IE6 is far greater," says Danivalsdóttir. "The IE6 fixing took much longer than anticipated, causing delays and cost increases."

Creating all the new stylesheets, page components, and new pages and functions for the five intranets was a time-consuming task—one that had to be completed before the launch weekend.

"Another constraint we faced was developing the redesign in the production environment," she says. "Therefore, the final changes, when we eventually launched the new design, had to be done over a weekend."

"The downside of working on the redesign in the production environment in a hidden/locked section in the LiSA CMS is that you can only get a partial view of the new design and can't view the website as a whole in the new look, so there is no overview," says Danivalsdóttir. "You don't see all the intranet pages prior to the launch or until all the stylesheets have been changed."

"The locked section included only the new homepage, section overview pages, sub-pages, new pages and functions, and pages with all the main stylesheets in the new design," she says. "There is some risk involved, since there is always the possibility you'll forget some minor things in the process or that something doesn't work when the website goes live—you only have the weekend to fix it."

Security

Another challenge for the Kaupthing global intranet involves security issues. Enabling employees across all locations to access the site and its information, while still maintaining security and privacy, has been difficult.

"The main constraints we faced during this process had to do with technology—connecting new offices Kaupthing had acquired and giving their employees access to our intranet," says Ólafsson. "For obvious reasons, a bank has very strict rules about giving external access to its IT environment, and this has often been a long and difficult process."

"Our intranet site is authenticated via strong domain authentication to allow website personalization and employee access to update their profile information," says Bjarni Ólason from the bank's IT division. "This also allows us to use the intranet website to host many sub-Web applications with good security. This has been a challenge when new companies that do not have our domain infrastructure are added to the group. We are investigating domain user account provisioning tools to help tackle this issue."

TIMELINE

In February 2007, Kaupthing launched new external websites to align with its new brand identity. Later that year, the bank decided to also migrate the intranets to the new branding. "After some investigation," says Danivalsdóttir, "a decision was made to modify the stylesheets rather than create new websites from scratch." They chose this solution to meet the tight timeframe for the project (just a few months).

On January 21 2008, five intranets were launched simultaneously in the new design (Global, Iceland, Finland, Sweden, and Norway). "During the weekend of 19-20 January, a group of programmers and Web editors changed the stylesheets and fixed details, functions, and errors on all the intranets," says Danivalsdóttir. "When employees arrived to work on Monday morning, 21 January, the new intranets were already up and running."

The timeframe for both intranet projects was short. “We cannot recommend such a tight timeframe because these months were simply crazy and we were very short of internal staff,” says Ólafsson. “There were very long hours for the whole period. But having a fixed deadline can also be a great incentive to achieve goals. We could, of course, have spent one to two years creating the intranet, but that was not an option.”

They did their best to get input from key stakeholders in different Kaupthing offices along the way, but such a compressed project schedule meant that the team could not consult all the offices in detail about the project.

GLOBAL INTRANET V.1 TIMELINE: 2005	
July	Excel wireframe
July–August	Graphic design and needs analysis
August–November	User testing and heuristic evaluation; screen flow
September–November	Programming

GLOBAL INTRANET REDESIGN TIMELINE: 2007/2008	
October–November	Needs analysis, new functions, and graphic design
November–January	Programming and testing
January	User testing, fixes, and changes to stylesheets prior to launch

USERS

The intranet serves approximately 3,200 employees in 13 countries. Their roles reflect the bank's services, including: corporate and retail banking, investment banking, capital markets services, treasury services, asset management, and wealth management for private banking clients.

USER TASKS

“The most important feature on the intranet is, without a doubt, the employee directory,” says Danivalsdóttir, adding that employees use it often to find employees and also to search for lists of employees in divisions, other countries, and so on.

Other important features include news and announcements from the bank, press releases, access to marketing material, the Bank's share price, and holidays and events.

The site’s core features are:

- News and announcements
- News from the local intranets
- Press releases from the Bank
- Event calendar (company meetings, corporate events, tradeshows, and so on)
- Holiday calendar for Kaupthing’s countries of operation
- Weather and local time for Kaupthing's countries of operation

- Live financial information, including share prices and international indices
- Notifications of new employees and job openings
- Kauplink file archive
- *Happy Birthday* announcement on homepage
- *The Other Side* weekly employee Q&A
- Weekly opinion poll
- *Do you know your colleagues?* introducing five randomly selected employees each week
- Kaupthing's *Principles* campaign (internal marketing), including:
  - John Cleese introducing the 11 Kaupthing principles
  - An employee photo competition
- Information about new products and services
- Latest ad campaigns with archive of brand and marketing materials
- Access to image/brand site (logos, images, fonts, PowerPoint presentations, and so on)
- Searchable company directory with photographs and detailed information
- Search engine that searches the intranet and Kaupthing's public websites, and has an integrated Google search box for general Web search
- Shortcuts to Kaupthing's public websites (in a drop-down list)
- *My Site* personalization, including:
  - *My Links*
  - *My Phonebook* with internal and external contacts
  - Personalized area with drag-and-drop personalization components
- Features standard to every page, including:
  - *Print this page*
  - *E-mail this page*
  - *Add to My Links*
  - *Rate this page*
- Various work tools, such as access to databases, account numbers, computer tips, English language tools, travel information, glossary, and so on
- Extensive information about each Kaupthing office, including location, pictures, videos, maps, telephone, fax, and other contact information
- A list of hotels, airports, restaurants, and transportation services in the area of each office
- Interactivity, including:
  - *Photos from Employees*: employees send in their favorite photos
  - Employee blogs: employees write about what interests them
  - Employees can change their profile on the company directory from the intranet
  - Employees can post classified ads in the *Flea Market* (subject to approval/proofreading)
  - Employees can also send in news stories to publish (subject to approval/proofreading); suggest opinion poll topics; send suggestions for improvements; and rate every page on the intranet
- Employee competitions, such as World Cup 2006, Euro 2008, and intranet surveys

DESIGN PROCESS AND USABILITY ACTIVITIES

The launch of the new Kaupthing Bank brand in early 2007 provided the impetus for the site's redesign. And, unlike the 2005 project, the emphasis this time was on creating a uniform Kaupthing culture across more than 10 countries.

Planning for the project can be tracked back to 2006, just a year after the original site launched. At that time, the intranet team conducted a survey on the intranet, giving employees a list of certain features or items and asking what they'd like to see more of on the site. Among the items on the list were news stories from around the group; practical information, such as share prices, a currency converter, and travel information; information from senior management; and blogs. Employees were also encouraged to contribute general suggestions and list their ideas for an improvement.

"We got a fantastic response and a lot of ideas from users," says Danivalsdóttir. "Hundreds of people showed their interest by sending in their feedback." She says this great response was at least in part due to the fact that respondents were automatically entered in a drawing to win an iPod.

The team used many of the ideas and comments from the survey to improve the site. "We also follow logs closely by using Web metric tools like Google Analytics," she says, adding that they use annual Nielsen Norman Group reports as well. "*Intranet Design Annuals* over the years have also been very useful in improving our intranet."

User Response

Below are some examples of intranet suggestions the team received from users in the November 2006 survey. "It was a pleasant surprise to see that the users had a wealth of inventive ideas on the intranet," says Danivalsdóttir, adding that they "might never have come forth without the survey."

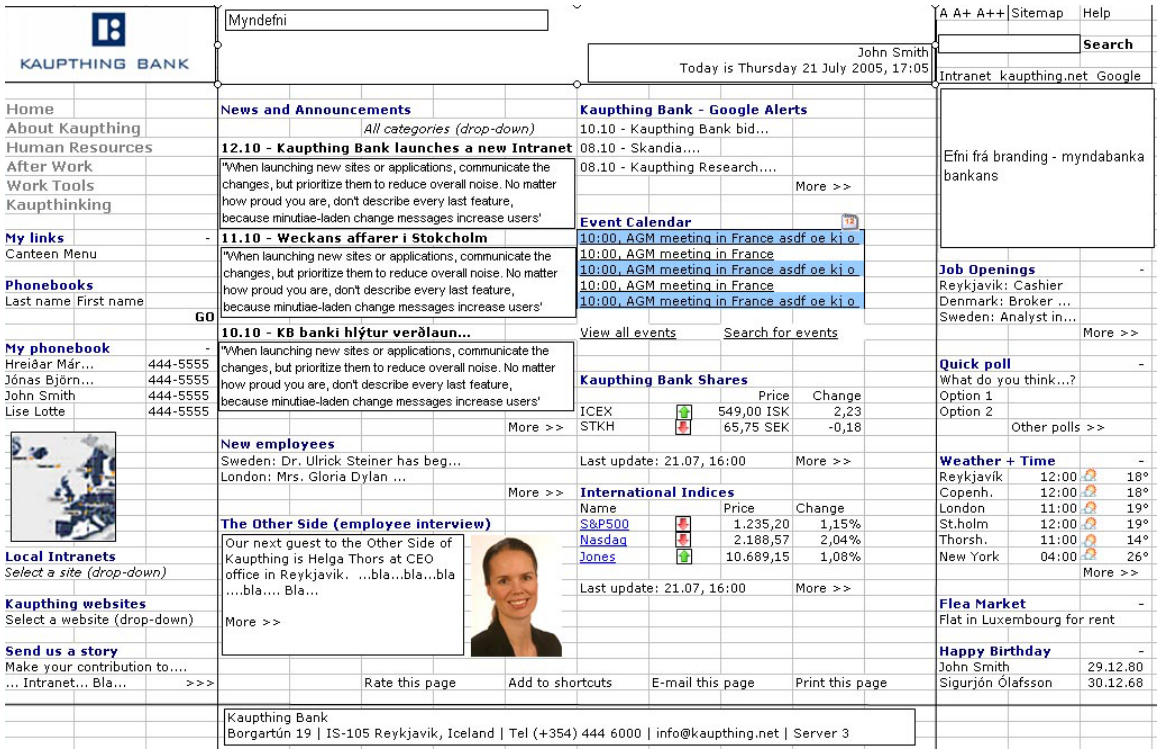
What the users said:

INTRANET SUGGESTIONS FROM A 2006 USER SURVEY
"Online international discussion groups on different topics, we could call it 'Topic of the Day.'
"Simple but efficient market monitor not only with ICEX but UK, NORDIC and US data for all people not linked to Bloomberg directly." *"Latest news from around the world as a pop-up when you log onto the Kaupthing intranet...like access from BBC news without logging on to their web site or any other news site."*
"How about a weekly tip - e.g. telling you where on the intranet you can get information, e.g., where you can get the logo - I only found this out recently and I know my colleagues hadn't found it either."
"Access to the intranet outside work through login/password. Option of printing my phone book in single page w/ minimal layout - picture - name - phone 1 - phone 2 - mobile - etc. An option to get a reminder of people added to your phone book. An option to get a reminder of an event in the events calendar. Either to outlook, mobile or through e-mail. More chances to win free things!"

10 Best Intranets: Kaupthing Bank

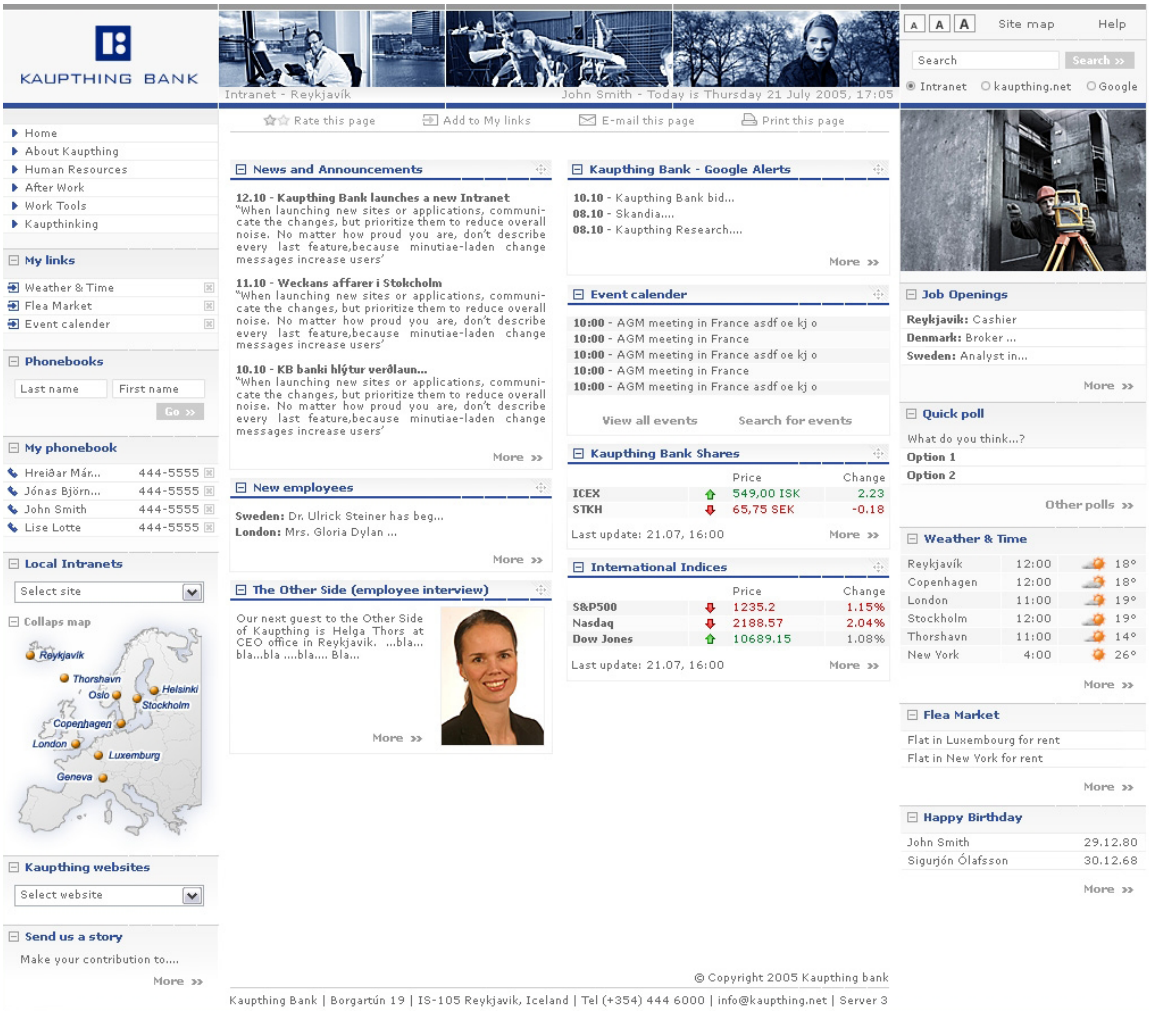
"Practical information such as info about the meeting rooms in all our offices i.e. how many seats, what equipment etc."
"Great site, practical yet fun. We have an SMS capability in the Glasgow office and find it to be very useful indeed, I would imagine that almost every department in the group would find it similarly useful."
"Organizational charts for each unit and business area."
"Hottest tips from the research department announced on a "billboard" so every one can spread Kaupthing's ideas for stock picks!"

The intranet team also analyzed Web metrics to inform their redesign choices. And their agency, SJÁ, conducted user testing of new design prototypes, as well as an expert review on the redesign prior to launch.



Pictured: The Excel wireframe of the original intranet, launched in November 2005. Two graphic designers were selected to make design proposals for the new intranet based on this wireframe.

10 Best Intranets: Kaupthing Bank



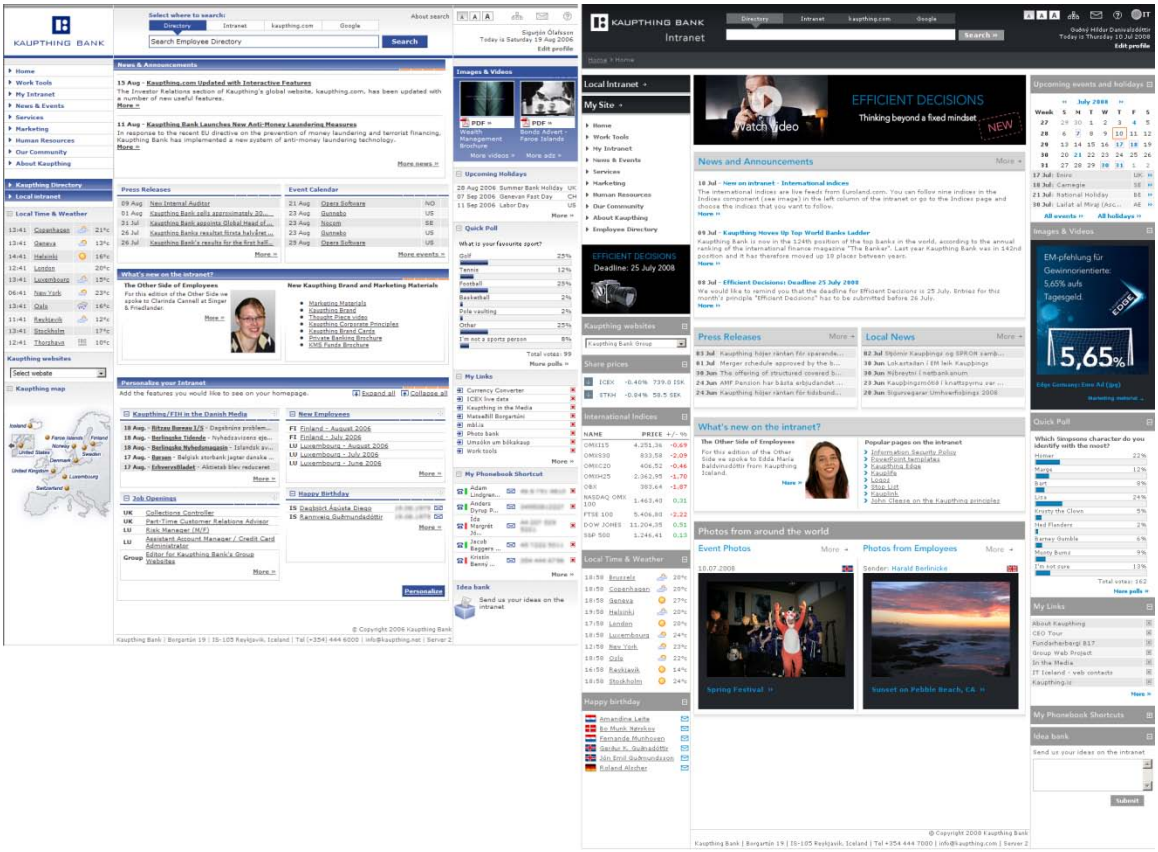
Pictured: The team selected this design proposal to further develop.

10 Best Intranets: Kaupthing Bank



Pictured: The intranet design in its final stages, prior to the 2005 launch. Some features seen here—including the Outlook e-mail, the calendar, and tasks—were not included in the actual launch for security and technical reasons.

10 Best Intranets: Kaupthing Bank



Pictured: A side-by-side view of the global intranet in 2006, prior to the redesign (left), and in 2008 after the redesign (right). Blue was Kaupthing's brand color; now it's black. The frame is the same on the original and the redesigned intranet, but the color usage and set-up is different. New functions and sections were added and older functions were improved.



Time/Date	Impressions	Of this list
2005	128.170	1,68%
2006	1.415.686	18,56%
2007	2.942.854	38,58%
2008	3.140.276	41,17%
Total:	**7.626.986**	**100%**

Pictured: Intranet traffic statistics from 2005 to 2008. This chart shows the number of page impressions in 2005, 2006, 2007, and 2008. There has been a steady rise in the intranet usage since November 2005, when the global intranet was launched. In 2005, there were 128,170 page impressions compared to 3,140,276 in 2008.

URL AND ACCESS

The intranet URL is http://intranet.kaupthing.com

The site is the default start page for all Kaupthing employees worldwide. Users are recognized on the homepage and see their names in the top right-hand corner in the header, where they can update/edit their own profile information. Users can access their local intranet by clicking a prominent *Local intranet* shortcut link in the left column. Users can change their start page during a session, but the global intranet is reset as the start page after restart.

Employees don't generally have remote access to the intranet, but a VPN connection is available upon request.

TECHNOLOGY

The intranet's wireframe was originally built in Microsoft Excel. Based on this wireframe, the graphic designer drafted proposals in Adobe Photoshop CS3. The IT

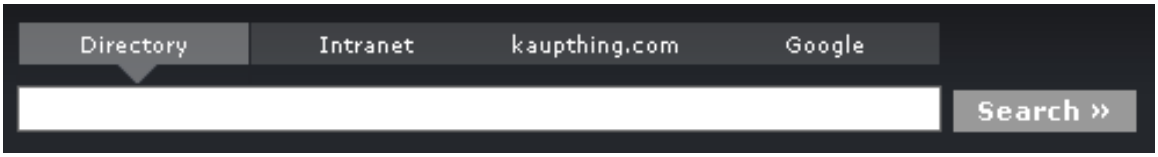
department then developed the project using Visual Studio 2005 and LiSA (www.eskill.is), which uses .NET technology, as the CMS.

"Very few solutions are developed at file level in Visual Studio; our LiSA system is the most commonly used development tool," says Ólafsson. "Certain visual elements of the site, such as animated banners and analogue clocks, are created with Adobe Flash CS3."

The website's hardware is a HP Proliant 64-bit server running MS Windows 2003 64-bit operating system.

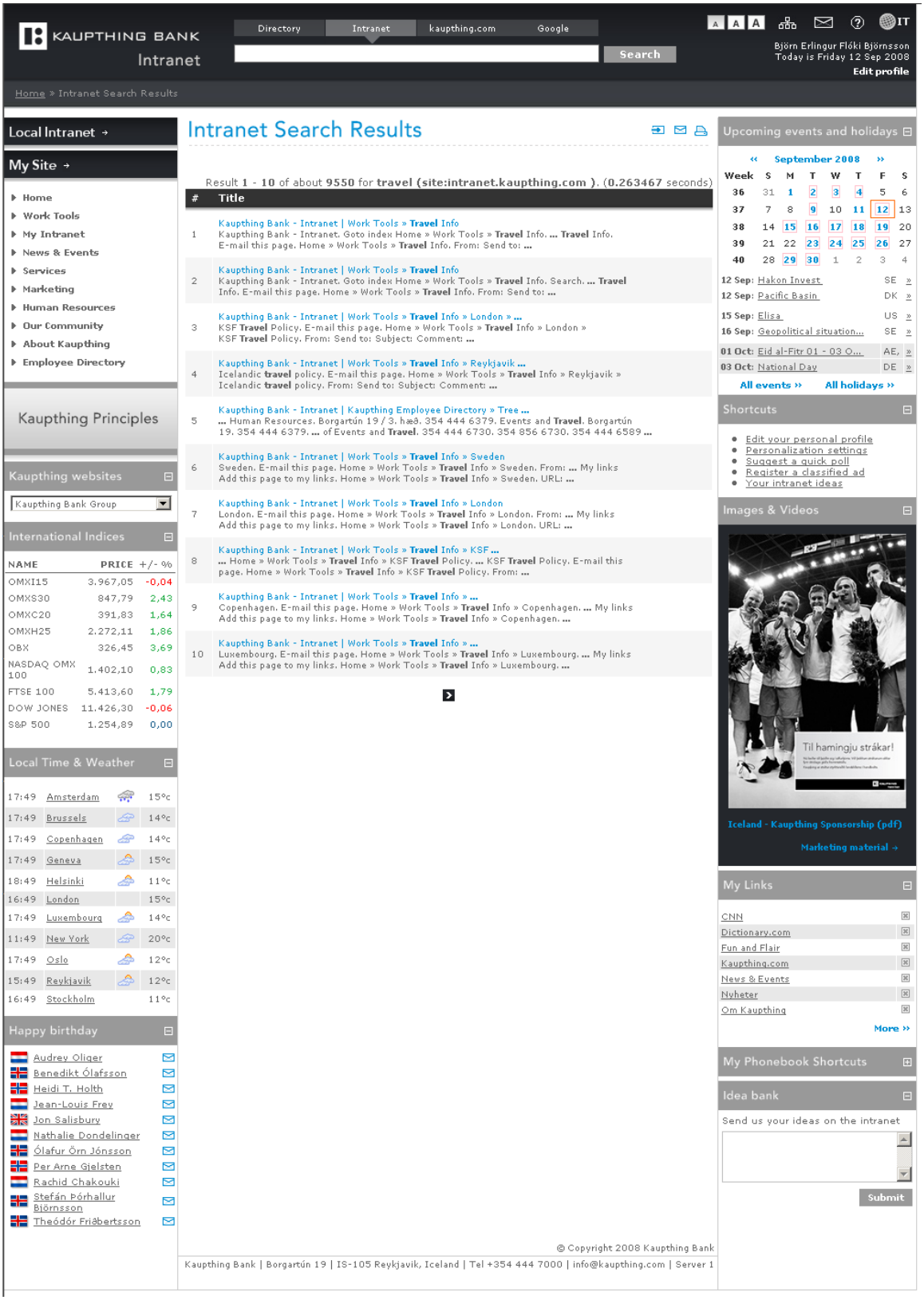
SEARCH

The intranet has a Google search box, but the site uses only its most basic features. Google has been the site search since the launch of the intranet in November 2005. The team chose it because it wanted a "proven" technology. "We have good experience with that tool," says Ólafsson. "Although we know that we have not fully used all its potential yet, the basic Google search has proved sufficient for our current needs. We have not received requests from our users for more search features."



Pictured: The intranet search box, close-up. This search bar appears on top of all pages. Users can search in the intranet directory, intranet pages (via Google's site search engine), kaupthing.com, or Google.com.

10 Best Intranets: Kaupthing Bank



Pictured: An example search results page for the word “travel".

CONTENT MANAGEMENT

CMS Technology

The Kaupthing Bank intranet content is built and maintained through the LiSA CMS system. The LiSA.NET CMS was developed by a Kaupthing technology partner, the Icelandic service provider Eskill Ltd., and is sold to various companies. Although Eskill doesn't custom build the CMS for each company specifically, clients are encouraged to send feedback and requests for improvements to be included in future versions of the software. "These requests have been met enthusiastically by Eskill Ltd.," says Björn Erlingur Flóki Björnsson, Web editor, adding that Eskill has "used many of our ideas for their LiSA development."

LiSA is based on Microsoft server technology. The programming language is C# utilizing the .NET 2.0 framework on IIS for the application. The database is run on SQL Server 2000 and SQL Server 2005, on both 32-bit and 64-bit platforms.

"The software is ideally suited to reuse and transmit information managed by other systems," says Hrafnhildur Sif Sverrisdóttir, from Kaupthing's technology agency, Eskill Ltd. "LiSA offers a significant number of special features and advantages, and is also undergoing continuous development," she says.

Customizing the CMS Functionality

The intranet uses the LiSA CMS framework and takes advantage of LiSA's numerous built-in features. Kaupthing's programmers also take advantage of LiSA's API to write their own user controls, which can be applied to all Web pages and page sections in the CMS.

An example of the extended functionality is the highly flexible customization for each intranet user. Users can easily customize their view using drag-and-drop control and choose their display options from multiple objects. Information like news and calendar events is region-specific, which ensures that employees receive the information they need.

Features such as the *File Archive*, *My Phonebook*, *My Links*, *Flea Market*, and *Job Openings* use built-in LiSA solutions, where data resides either in LiSA or in external systems. "The flexibility of LiSA CMS ensures that such external connections can be easily implemented, for example, by using the LiSA WebService Control," says Sverrisdóttir. "Another LiSA functionality much used by the intranet is the List Object that allows the admin user to create customized databases to hold and receive data."

Data is then displayed, filtered, and sorted using XSLT/XML. Example implementations include the *Flea Market*, *Menus & Recipes*, and various registration forms.

Content Ownership

The global intranet content is owned and managed by the Web team members in Corporate Communications. Content sent in by other staff members is edited and proofread by them prior to publication. "We find that centralizing content management within Corporate Communications ensures consistency in its content, look, and feel," says Danivalsdóttir.

The global intranet editor is responsible for all intranet sections, with the exception of a few dedicated sections managed by editors from particular divisions. CMS access is restricted to an editor's own section content. These sections are accessible only to employees in their respective divisions.

The team has created an environment encouraging employees to submit content to the site for publication using several of the site's features, such as a static *Idea bank* form in the right column. "We try to create an environment in which employees throughout the company feel comfortable sending in material, such as human interest stories and interesting accomplishments," says Danivalsdóttir.

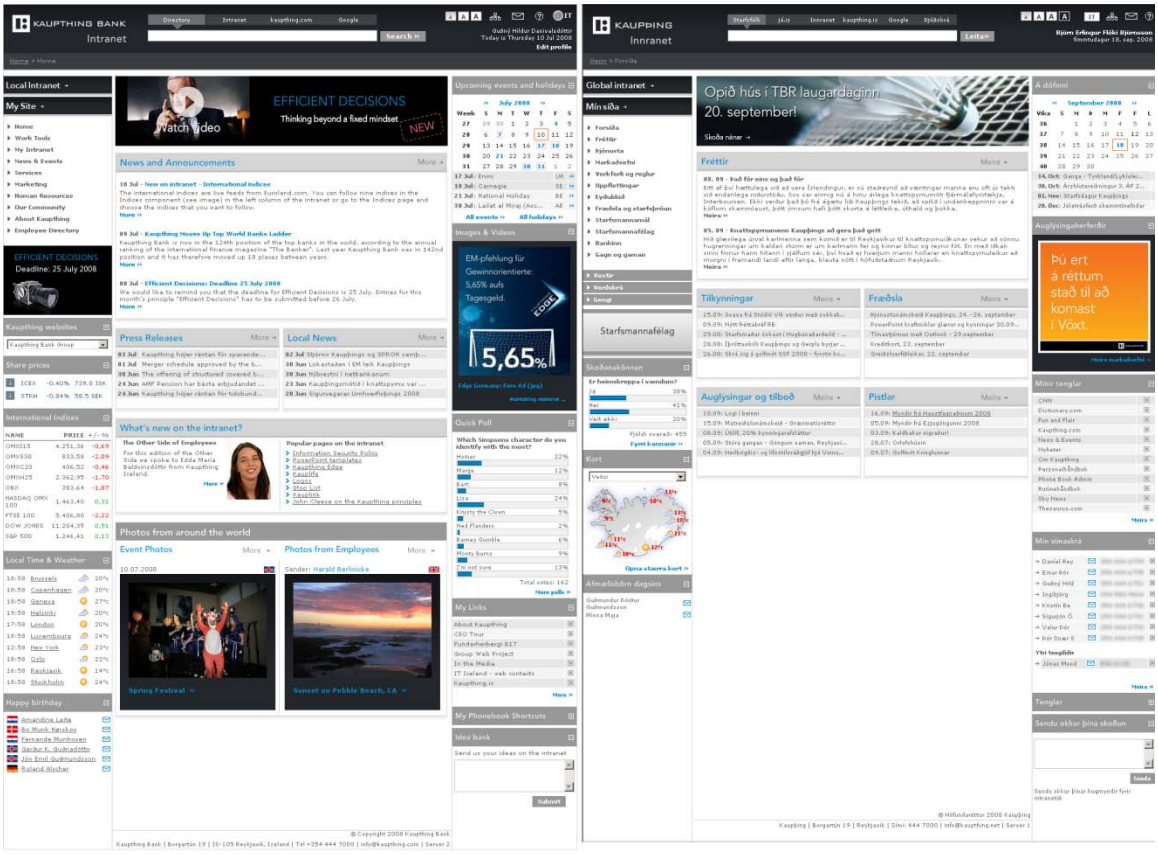
The global intranet is entirely managed by the Web team in Corporate Communications, so template enforcement is not required. Authors on the local intranet sites don't have permission to create or edit templates/stylesheets, which Danivalsdóttir says ensures design consistency and conformity to the brand guidelines on all of the bank's intranets. "Enforcing the design standard has therefore not been met by many challenges," she says. "It has also proved beneficial that the head editors of the local intranets for the most part come from the Marketing division of each office, as they are conscious of the design standards defined by the brand guidelines."

This awareness has played an important role in keeping the look and feel of the intranet sites consistent. As a result, deviations from design standards on the local intranets are rare.

Global Templates

The team established a uniform template for all pages, with the option of excluding the right-column components, depending on the content area required for the page. The templates were designed in accordance with Kaupthing Bank's brand guidelines, in cooperation with Kaupthing Bank's brand manager.

"We have not developed design guidelines specifically for the templates, as all the templates are managed and supervised by the Web team in Corporate Communications with the brand guidelines in mind," says Danivalsdóttir, adding that the design guideline for managing content pages includes color usage, headings, image usage, and so on. Local intranets use the same templates as the global intranet, with minor changes to suit each office's needs (such as expanding the news area) while leaving the overall layout and look and feel unchanged.



Pictured: A comparison between the global intranet (left) template and the template as it is used on the Icelandic intranet (right). Local intranets use the same templates as the global intranet, with minor changes. The homepage designs can vary from country to country. The set-up, emphasis, and functions are tailored to some extent to suit the needs of each office, while the overall layout, color usage, and look and feel remains the same.

Local Intranets

Local intranet sub-sites exist for the bank's offices in Iceland, Sweden, Norway, and Finland. These intranet sub-sites are managed through the same CMS by local staff, with support from the global Web team as needed.

Each local intranet has a lead editor from the local Marketing division that manages all of his or her sub-site's content. HR staff members are also given access to update sections relevant to their own division.

"The authors of the local intranets are, for the most part, autonomous in their content management," says Ólafsson, adding that they have "full access to content-driven features in the CMS, including full page permissions, access to the news manager, image uploading, page security, and page components."

Sub-site authors do not have access to templates, stylesheets, or any other elements that can change the overall site's structure or appearance.

MOBILE

The site is not optimized for remote access via mobile devices. However, the intranet's employee directory, which contains contact information for every employee

in the company, is accessible in BlackBerry handheld devices and all mobile phones/devices that support Microsoft Activesync.

"Currently, there is no requirement for mobile access to the intranet," says Björnsson. "However, we are in the process of integrating into our intranet directory a free SMS sending option to all employees' mobile phones, as well as to any external mobile phones."

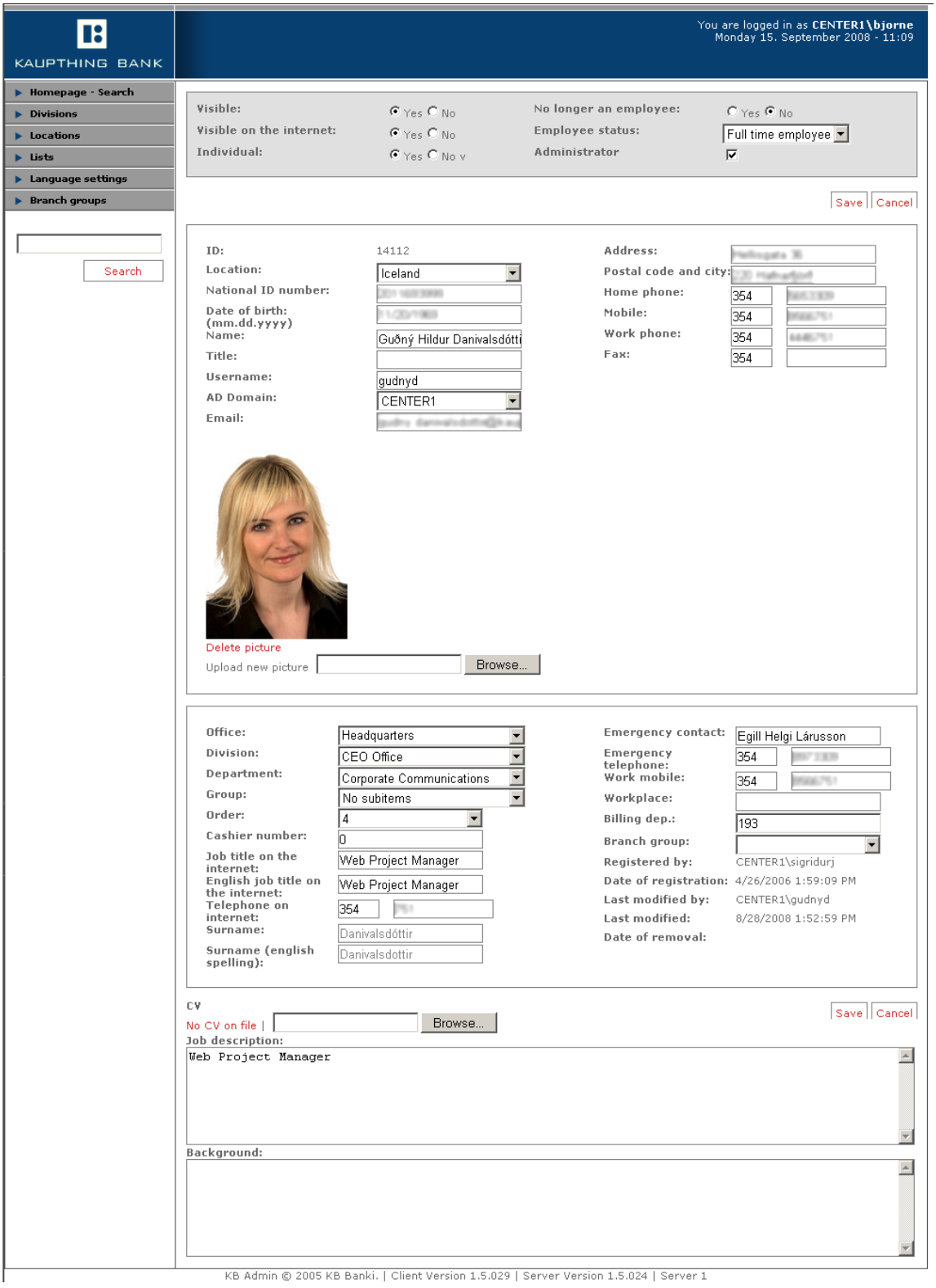
The directory will feature an SMS icon next to the person's name that, when pressed, displays a simple SMS sending form.

FEATURES

Though many of the site's features have been mentioned throughout this report, following are some of the most interesting and popular site components.

Intranet directory. This is the intranet's most popular feature. It lets users run an open search, search for words with special characters, or filter by country, division, department, or job title. Employees are registered in the intranet directory through the Directory admin system, a separate interface built for the intranet directory. Cisco WebDialer is a new intranet function that lets Kaupthing employees make calls from their desk phone by clicking on the hyperlinked telephone numbers (office and mobile) in the intranet directory.

10 Best Intranets: Kaupthing Bank

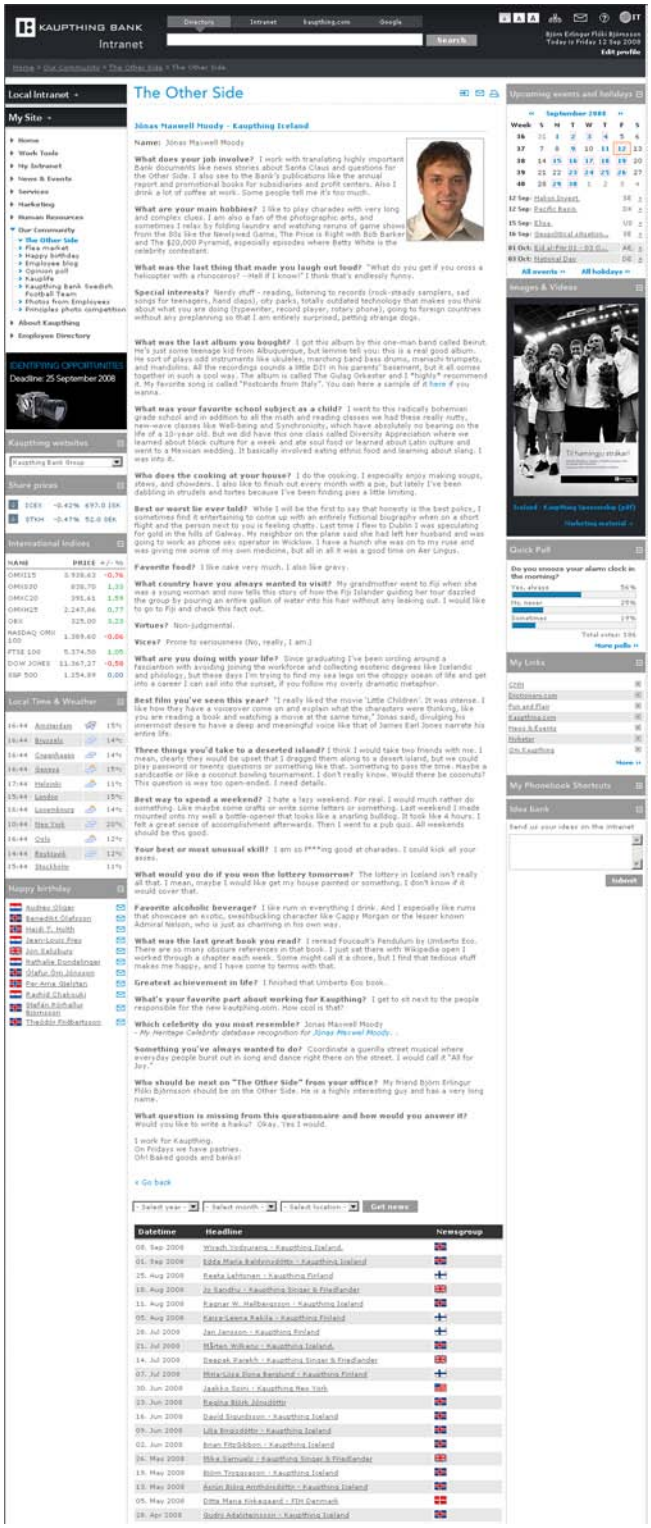


Pictured: The directory administration system. Employees are registered and edited in the intranet directory through this system, which is a separate interface built for the intranet directory.

***My Site* and personalization.** *My Site* offers all personalization on one page. Employees can choose site components they want by adjusting their personalization settings and the setup (drag and drop). Among the components that users can choose from are *My Phonebook*, *My Links*, *Flea Market*, *Job Openings*, *New employees*, currency exchange rates, currency converter, and *Menus & Recipes*.

***The Other Side* (of employees) and an opinion poll.** *The Other Side* is a weekly light-hearted interview with the employees of Kaupthing Bank that has appeared weekly since November 2005. There is also a weekly opinion poll to increase user's participation on the intranet.

10 Best Intranets: Kaupthing Bank



Pictured: *The Other Side* page. *The Other Side* offers a light-hearted, weekly interview with the employees of Kaupthing Bank and has been posted weekly since November 2005.

10 Best Intranets: Kaupthing Bank

***Photos from Employees* and employee blogs.** Last Christmas, all employees received a camera as a gift from Kaupthing Bank. *Photos from Employees* is a section that lets employees share their favorite photos from their personal collections. A thumbnail of the most recent photo is displayed on the homepage in the *Photos from Around the World* area, and all posted images can be viewed on the *Photos from Employees* page.

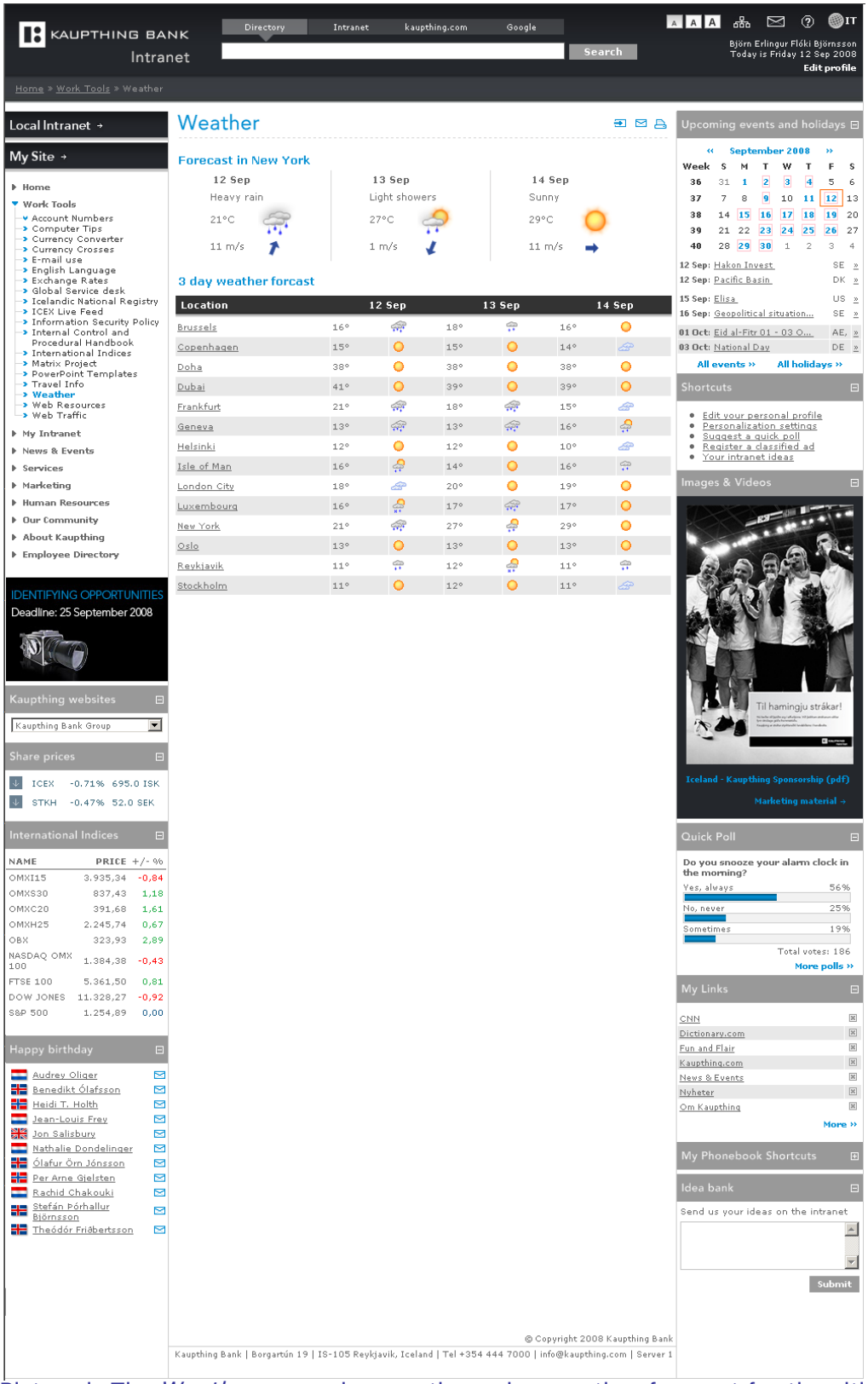


Pictured: Comments on a *Photos from Employees* submission. Users can get to these comments by clicking on the photo's title or the comment icon in the photo thumbnail on the main *Photos from Employees* page. Once clicked, the user sees a pop-up window with a larger image, name of sender, title, flag, a comment archive, and the post comment form.

Event and holiday calendar. In the homepage's right column, users see lists of all Kaupthing events and bank holidays along with a calendar.

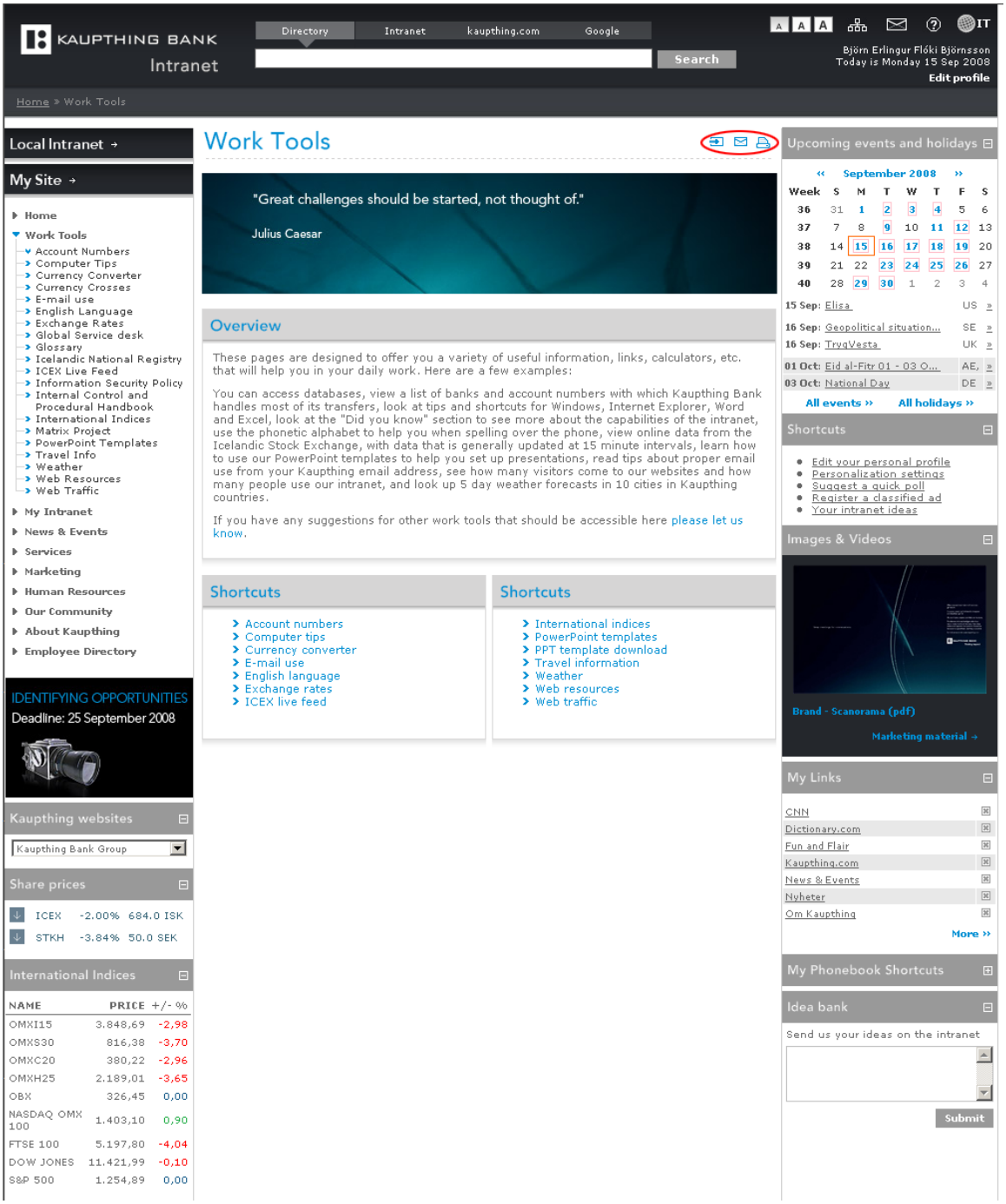
Local time and weather. This page shows a three-day weather forecast and the local time in Kaupthing's cities of operation. The homepage's *Local Time and Weather* component appears in the left column and shows local time, today's weather forecast, and a link to a three-day forecast for all cities.

10 Best Intranets: Kaupthing Bank



Pictured: The *Weather* page shows a three-day weather forecast for the cities in which Kaupthing operates.

Sub-page user options. All sub-pages let users print, e-mail, and rate the page or add it to their links.

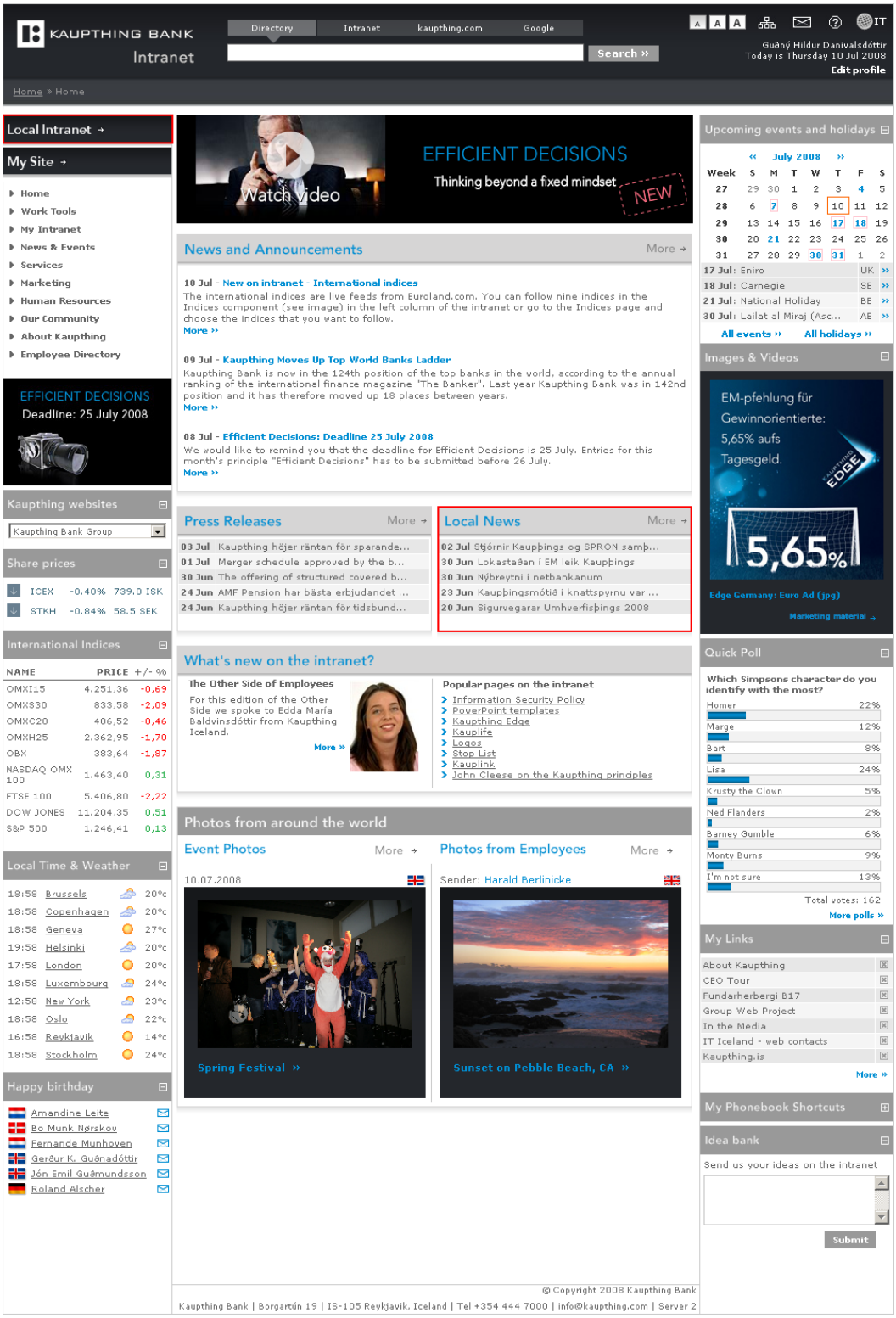


Pictured: The sub-page options are circled in red near the top right. Each sub-page offers users the option to print, e-mail and rate the page or add it to their links.

10 Best Intranets: Kaupthing Bank

Local intranet link and news box. Employees can easily access their local intranet from the global intranet using the *Local intranet* shortcut. They can also follow their local news on the global intranet's homepage in the *Local News* area. The intranet recognizes users and displays personalized information such as local news or, if that is unavailable, interactivity options that list the main interactive shortcut links available on the intranet.

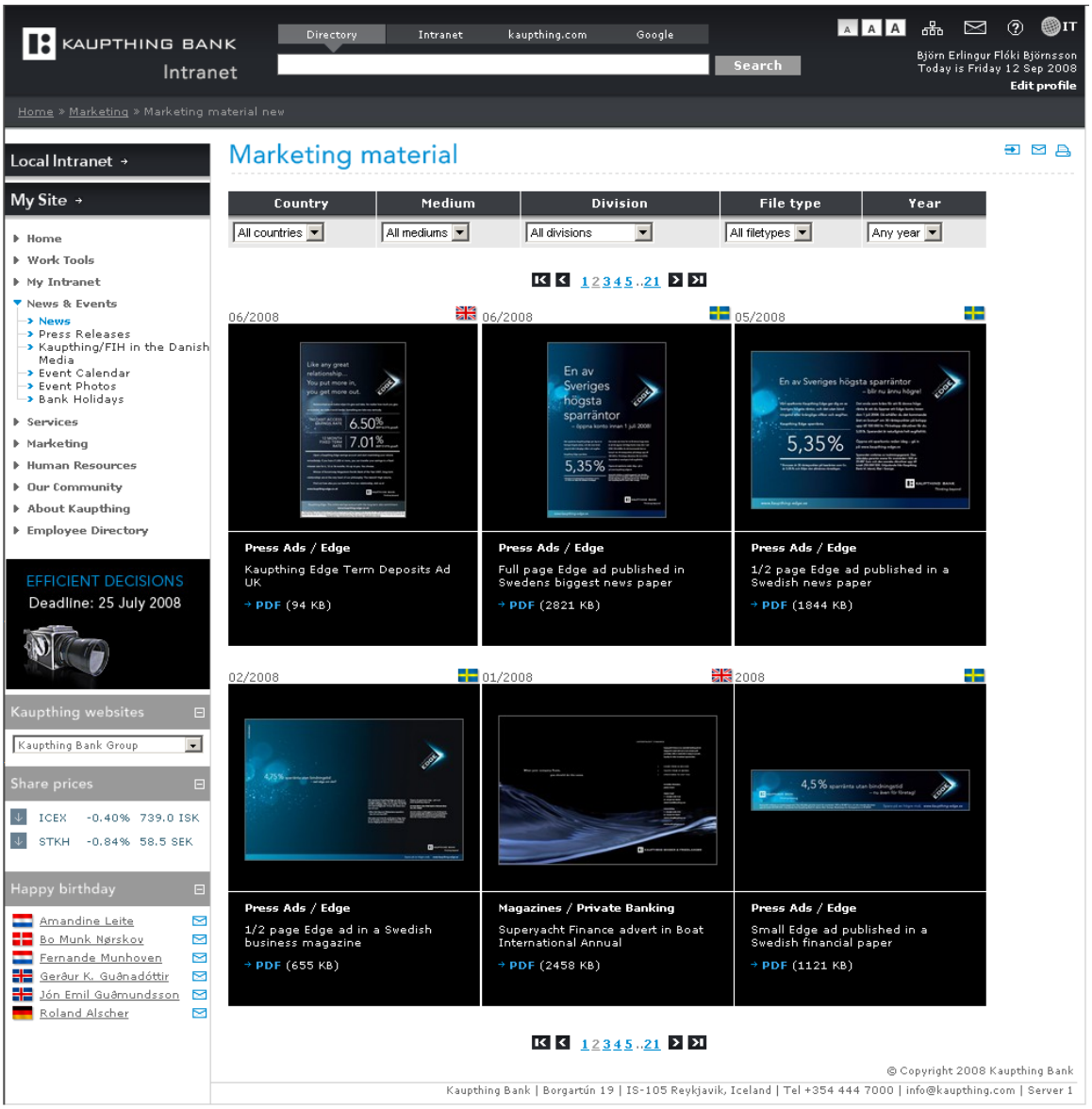
10 Best Intranets: Kaupthing Bank



Pictured: Employees can easily access their local intranet from the global intranet using the *Local intranet* shortcut. They can also access *Local News* on the global homepage. The intranet recognizes users and displays personalized information accordingly.

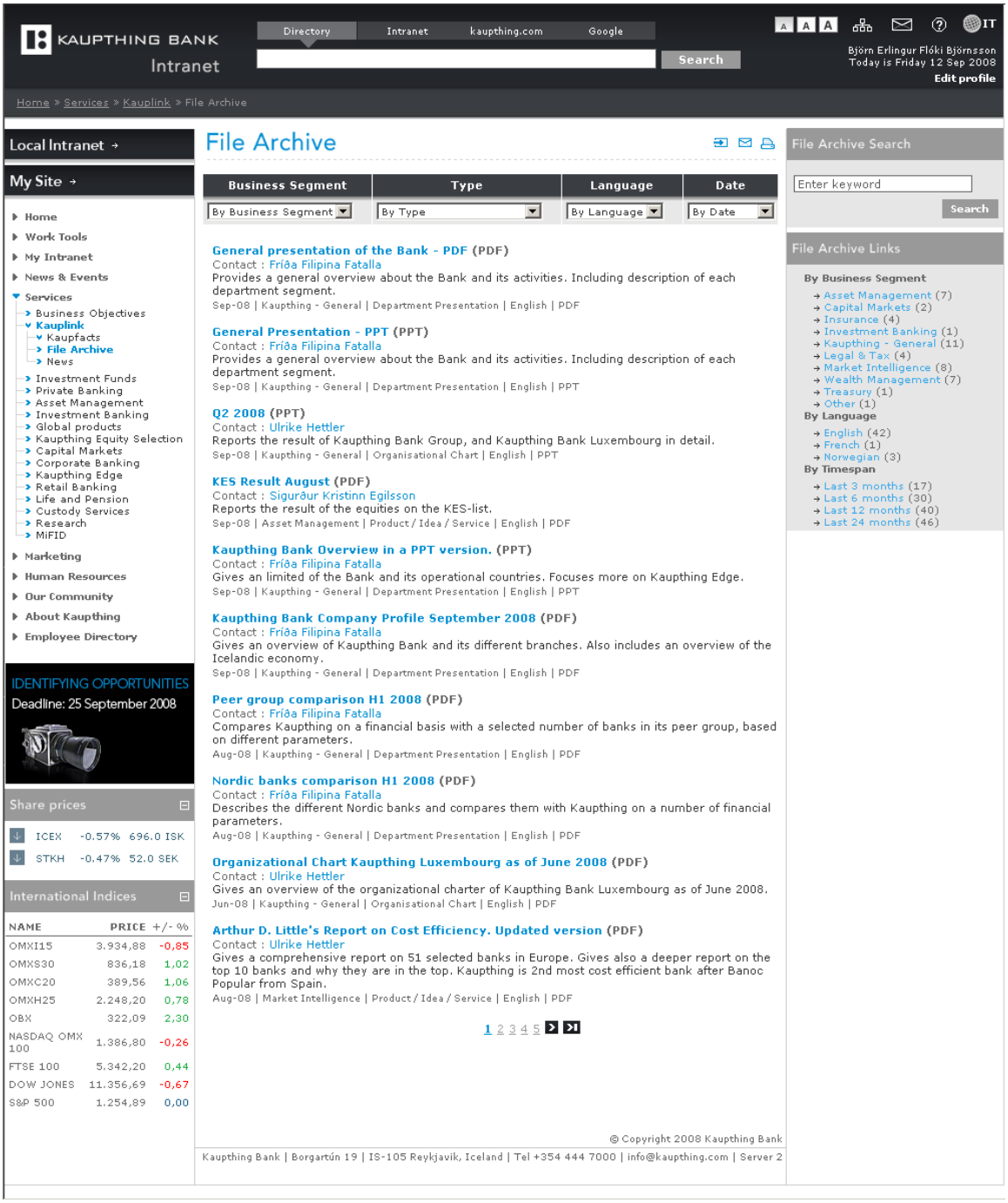
10 Best Intranets: Kaupthing Bank

Marketing material archive. All Kaupthing marketing material is collected in a database in the Brand LiSA/website. The marketing material is displayed in a searchable and filterable database on the Brand website, which offers restricted access for marketing people and advertising agencies. Users can mark each marketing material item to display on the intranet's marketing material archive page or on the Brand website only. So, the marketing material is simply inserted into a single LiSA database, but can be displayed on the Brand site or on the intranet.



Pictured: The *Marketing material* archive page. All the Kaupthing marketing material is collected in a database in the Brand LiSA/website. The marketing material is displayed in a searchable and filterable database on the Brand website, which is a restricted access site for the marketing people and advertising agencies.

10 Best Intranets: Kaupthing Bank



Pictured: A file archive page shows the 1st, 2nd, and 3rd level navigation and a sub-page. This page's filtering options are in the top menu, while the right column offers a *File archive search* and a list of *File archive links.*

LESSONS LEARNED

Sometimes, updating an existing site can create more work than starting from scratch. The team at Kaupthing learned this the hard way.

"If we would have known beforehand of all the constraints we would encounter and how much work and time the redesign would was going to take, then we would have seriously considered creating a new intranet instead of doing the redesign," says Danivalsdóttir. Given that, team members offer some lessons learned:

- **Evaluate your options.** "The cost of creating a new website or redesigning the old website is similar," says Danivalsdóttir. "The benefit of changing the stylesheets is that you don't have to physically move content and links, only edit the old pages, which can save some time."
- **Manage workflow.** "Due to the tight time plan, there were two programmers working on the stylesheets for the Icelandic and the global intranet at the same time," says Hrefna Arnardóttir, an Eskill programmer. "In hindsight, it would have been better to finish the stylesheets for the global intranet before we started on the Icelandic intranet, since there were some overlaps in the stylesheet work."
- **Planning and preparation can pay off.** "The launch of the five revamped intranets during the weekend of 19-20 January went better than expected, thanks to good planning, preparation, and experienced people," says Danivalsdóttir. "There were no big surprises in the launch, only fixes of details, functions, and minor errors on the intranets."
- **Get buy-in from the top.** "It proved to be very important to have backing from the CEO in the initial intranet project," says Danivalsdóttir. "He gave the project full support, both personally and by providing resources. He thought it was very important for the integration of different cultures in many different countries in the group. From the beginning, the CEO and the managing director of Corporate Communications have fully supported the intranet development."

RESULTS / ROI

Building an Umbrella

In February 2008, the global intranet became the default start-up page for all Kaupthing offices. Employees can easily access their local intranet from the global intranet using the *Local intranet* shortcut, and they can also follow local news on the global homepage through the *Local News* component. "The global intranet is the umbrella," says Ólafsson, "and the local intranets act as a forum for local information in regional locations. This gives us the latitude to sharpen the global intranet's focus, but not stifle the flow of regional information at the local level."

Bridging Geographic Divides

Kaupthing Bank has expanded very fast in the past five to six years, with several acquisitions in different countries. "Having one common intranet for the whole group was without a doubt one of the most important factors in creating a unified Kaupthing Bank culture and giving everyone access to the same information," says Ólafsson. "The effort we put in making the employee directory as efficient and user friendly as possible has paid off."

Measureable Improvements

Following the redesign, there's been a steady rise in intranet usage and a palpable increase in users' feedback and participation on the intranet. This includes suggestions for polls, ideas for improvements, photos from employees, photo competition entries, blogs from employees, and more user feedback in general.

"The CEO and executive management have, from the beginning, emphasized the importance of the intranet, so providing the management with data on the intranet's popularity has not been essential to their ongoing support," says Danivalsdóttir. "However, Web metrics data following the redesign showed that the redesign and its added features have indeed increased usage. Page views in the month preceding the launch date were 176,029, whereas page views in the month following the launch were 378,403."

Here are a few examples of things bank employees can do on the new intranet that they couldn't do before:

- Users can add external contacts to their phonebook and use the pager in the search results to slide through results more quickly.
- Cisco WebDialer, a new intranet function, lets Kaupthing employees make calls from their desk phone by clicking on the hyperlinked telephone numbers (office and mobile) in the intranet directory.
- All personalization was moved to one page: *My Site*. Employees can choose which components they want to display and the page setup. The page includes a component with all the interactive links available on the intranet.
- Employees can follow news from their local intranet through the global homepage's *Local news* and easily access their local intranet through the *Local intranet* link.
- Improve structure on overview pages—including introductory text and shortcut boxes—makes it easier for employees to find material in each navigation section.
- Users can share their favorite photos, participate in the Kaupthing's principles photo competition, blog about a topic that interests them, view John Cleese's videos on the business principles, and get to know their colleagues around the globe.

L.L.Bean

Using the intranet

L.L.Bean, Inc. is a privately held, family-owned company that provides quality apparel, reliable outdoor equipment, and expert advice for outdoor activities. Company jobs range from corporate management to retail sales, catalog services, distribution, returns, IT, and HR. Most L.L.Bean employees are based in locations throughout Maine. US store locations extend south from Bangor, Maine, to MacLean, Virginia. International locations include China, Costa Rica, Japan, Hong Kong, Taiwan, Thailand, and Vietnam.

Headquarters: Freeport, Maine

Number of employees the intranet supports: 5,300 to 12,200

Locations of intranet users

Countries: The US and Costa Rica (programmers, sourcing, and supply chain)

States: Maine, Connecticut, Delaware, Illinois, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, and Virginia.

Annual sales: more than $1.5 billion

Intranet design team

The core team consisted of five people from the HR department

Members

Leah Fitch, lead intranet designer; Linda Carew, project manager; John Vincent, intranet administrator; Laurie Gonyea, intranet designer; Melissa Coleman, intranet designer.

SUMMARY

The resourceful designers at L.L.Bean met their design challenges straight on, with quick thinking and wide-open minds.

The L.L.Bean intranet homepage grabs your attention right away with interesting photographs related to the top news story. Photos of real people doing real, outdoorsy things capture the culture and experiences of the organization. The featured story appears in the upper left of the homepage. A title bar encloses the related image and displays the article's title. Below the title is a short article description and a link to the full story. Having these attention-grabbing images and stories in a prominent place on the homepage reminds employees of all the interesting and fun things happenings at L.L.Bean. These stories can keep people interested and inspired.

Located just below the story of the day are links to interesting and important pieces of data about the business. The *Daily Call Volumes*, *Website Orders*, and *Website Orders Chart* help people better understand the business and its most current state of affairs, and helps people do their jobs more efficiently.

More news items appear in *Latest News,* which occupies the homepage's center section. Article titles are clickable links and appear in bold, blue type. Each article has a brief yet telling summary, which entices people to keep reading.

Below the news is the week's calendar. Dates and descriptions of various corporate events, meetings, and deadlines keep employees on top of things.

Important phone numbers for emergencies, security, HR, and support appear in the upper right of the homepage. And corporate reminders are located just below. These can include anything from asking for volunteers to help maintain a hiking trail (which in the end will likely also help L.L.Bean business) to the date of a corporate blood drive.

10 Best Intranets: L.L.Bean



Pictured: The interesting main story and related image keep people engaged on the homepage. The news, calendar, and important links make finding information and doing everyday tasks easy.

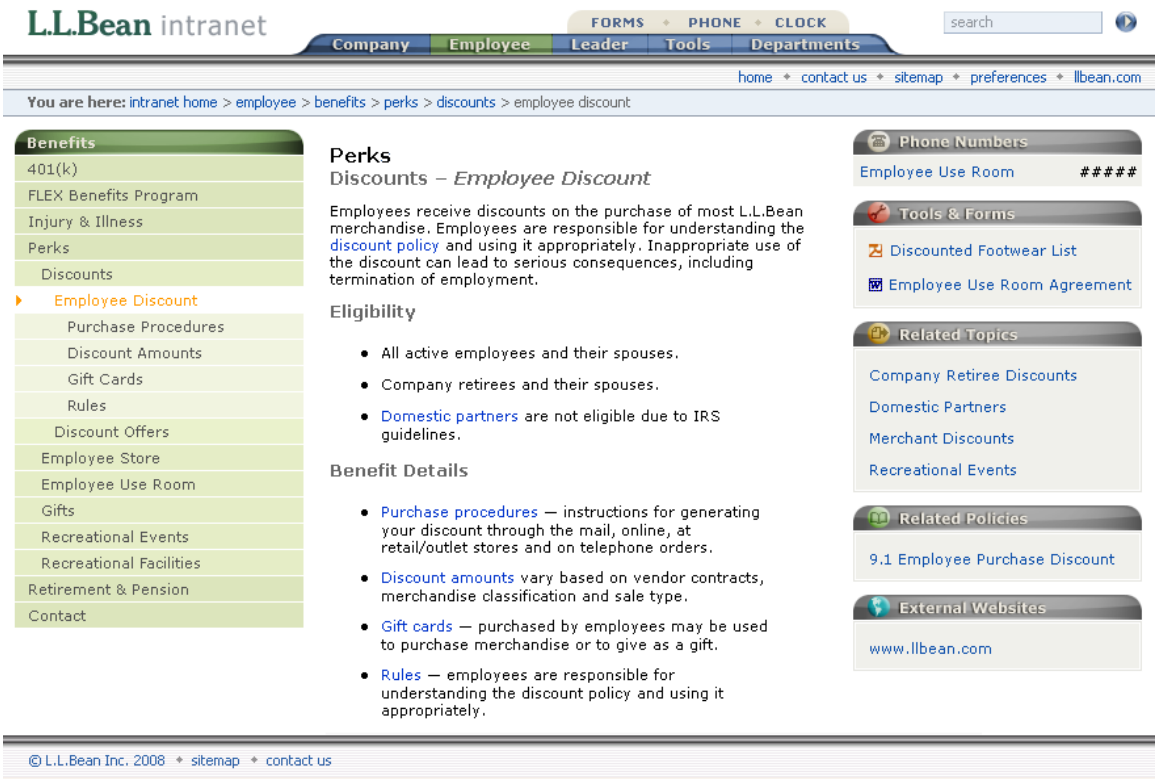
The designers also plan to make colorful skin options available for the intranet in the next release. In one skin, for example, the designers replaced the interface's flat tabs with a beveled-glass look and modified the colors for certain blocks of content. Users will be able to choose whether to keep the current skin or select one with more saturated colors.

10 Best Intranets: L.L.Bean



Pictured: An example skin. Designers will be providing different skins for users who prefer more saturated colors.

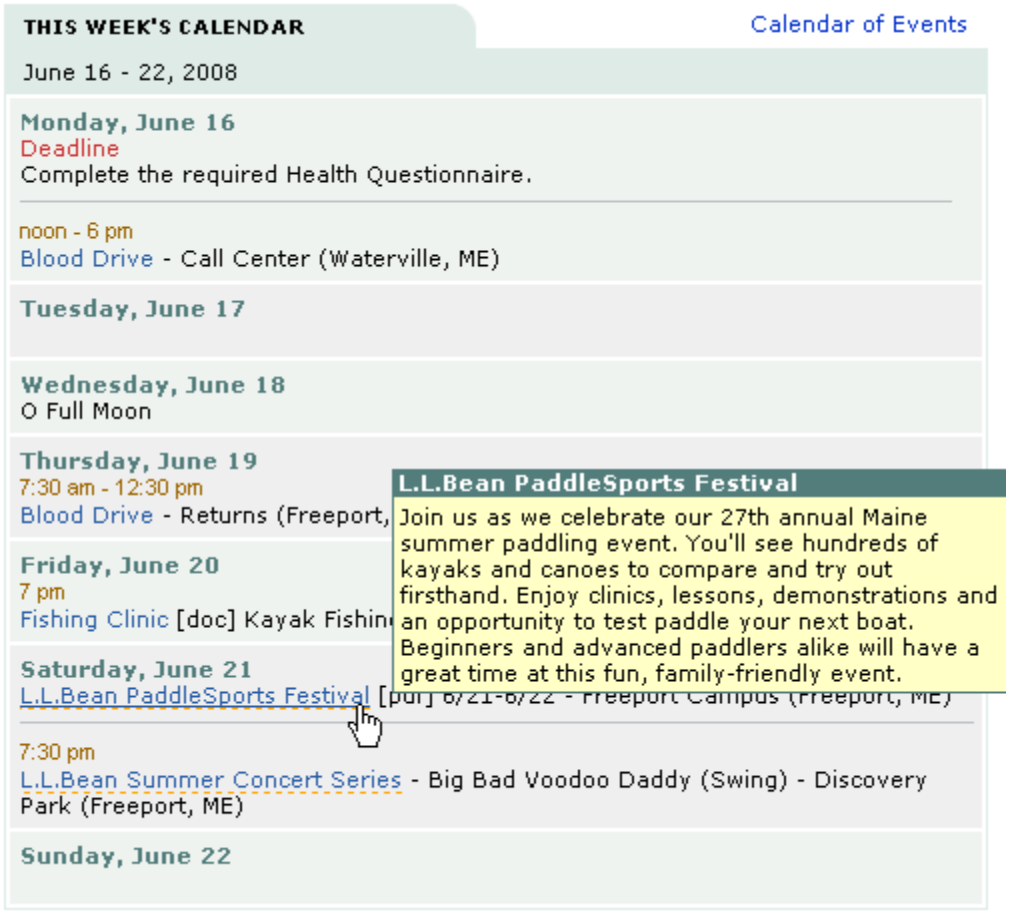
10 Best Intranets: L.L.Bean



Pictured: Users will also be able to display content pages in different skins. Shown here, saturated skins (versus the muted skins) carry through to content pages.

In the homepage's calendar area, mousing over an item with a dotted underline opens a tool tip with a longer description. In addition to giving more information, these tooltips help bond the teams on an international level. Although most L.L.Bean employees work in the Eastern US, the company also has international locations and employees in China, Costa Rica, Japan, Hong Kong, Taiwan, Thailand, and Vietnam. Because holidays in these regions can be different, and foreign, the intranet team added tooltips to domestic and international holidays in the calendar. These tips provide a cultural description and help educate and broaden the awareness of all employees.

10 Best Intranets: L.L.Bean

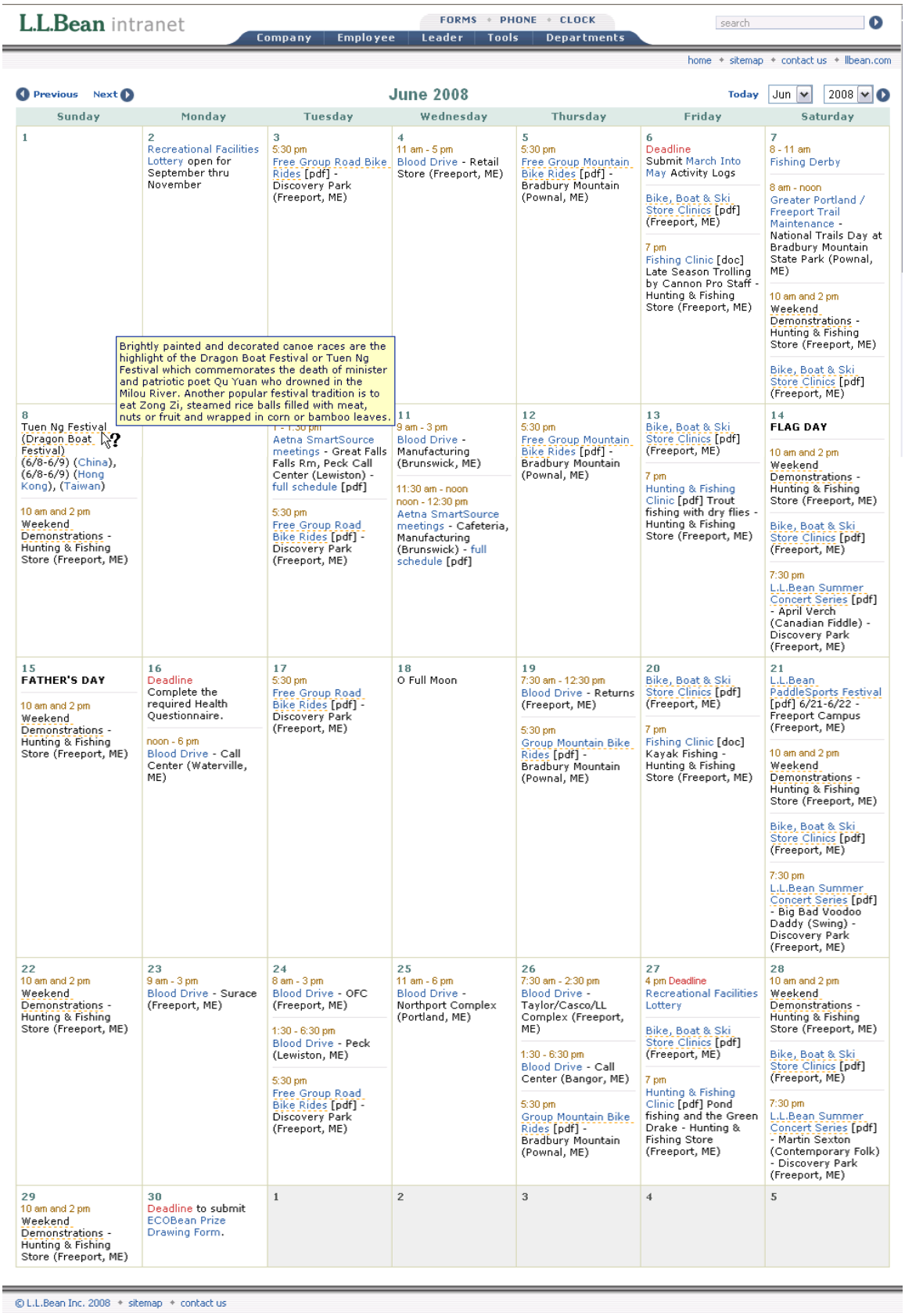


Pictured: Users can mouse over calendar items with dotted underlines to see tooltips that offer a longer description.

To see more events, users can click the *Calendar of Events* link that appears in the upper right of the homepage's weekly calendar. This area provides a month-by-month view of all corporate events for the entire year. This resource helps employees schedule and plan more accurately. This area is also the source for the weekly calendar entries, which are manually transferred each week to the homepage. This is a creative workaround, as intranet development team members can't download software from the Internet to build a more dynamically generated calendar.

Events are listed in the day blocks and are links to further information. Where appropriate, event times are also displayed. Links (the event title) are blue, time is yellow, and further information is in black. Users can navigate to the month before or the month after using the *Previous* and *Next* links in the upper left. Alternatively, they can choose from the drop-down month and date pickers, or use the *Today* link.

10 Best Intranets: L.L.Bean



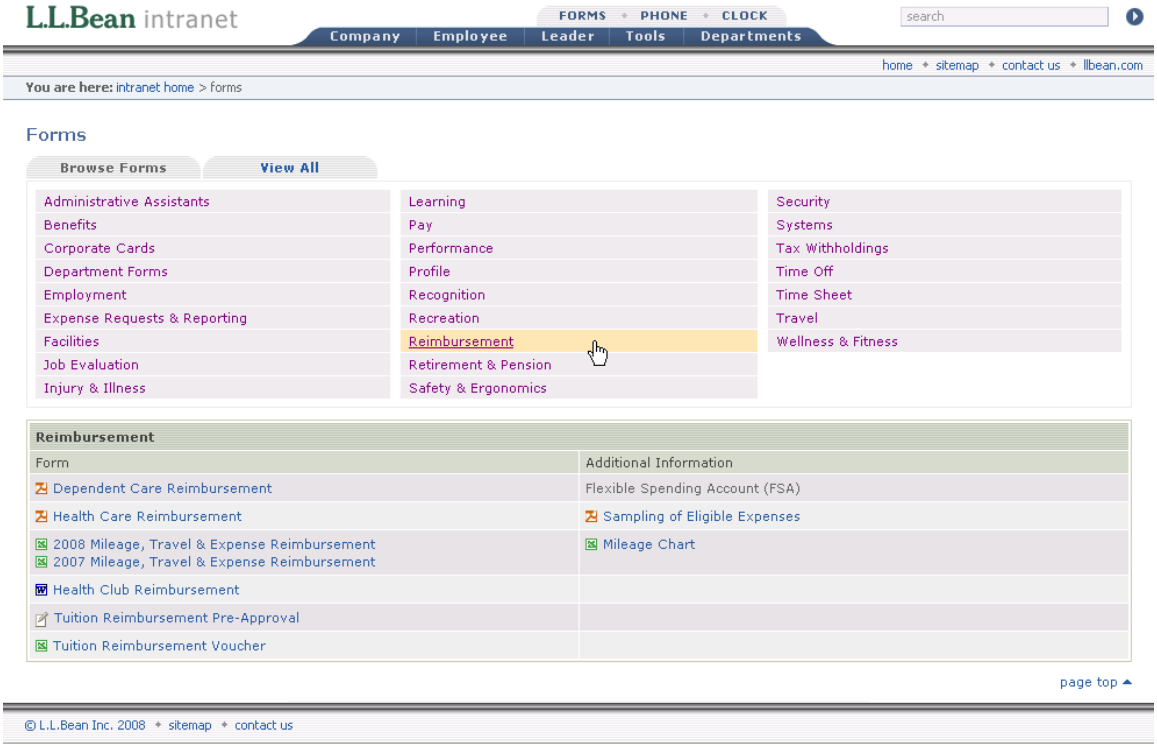
10 Best Intranets: L.L.Bean

Pictured: The calendar of events is created a year in advance, and is updated as needed.

The L.L.Bean intranet designers were resourceful in working within limitations to ensure that people can access the tools they need to do their jobs. Because the group doesn't have access to a relational database, the intranet provides applications as forms. And, rather than just giving flat forms, designers creatively used dynamic code within them to enhance the user experience.

To access the forms page, users click the *Forms* tab available at the very top of all pages. Once there, users start out in the *Browse Forms* tab/view. Here, the forms are sorted by understandable categories, such as *Benefits*, *Facilities*, *Job Evaluation*, *Learning*, *Retirement & Pension*, and *Time Sheet*. Employees can use these categories to find related forms.

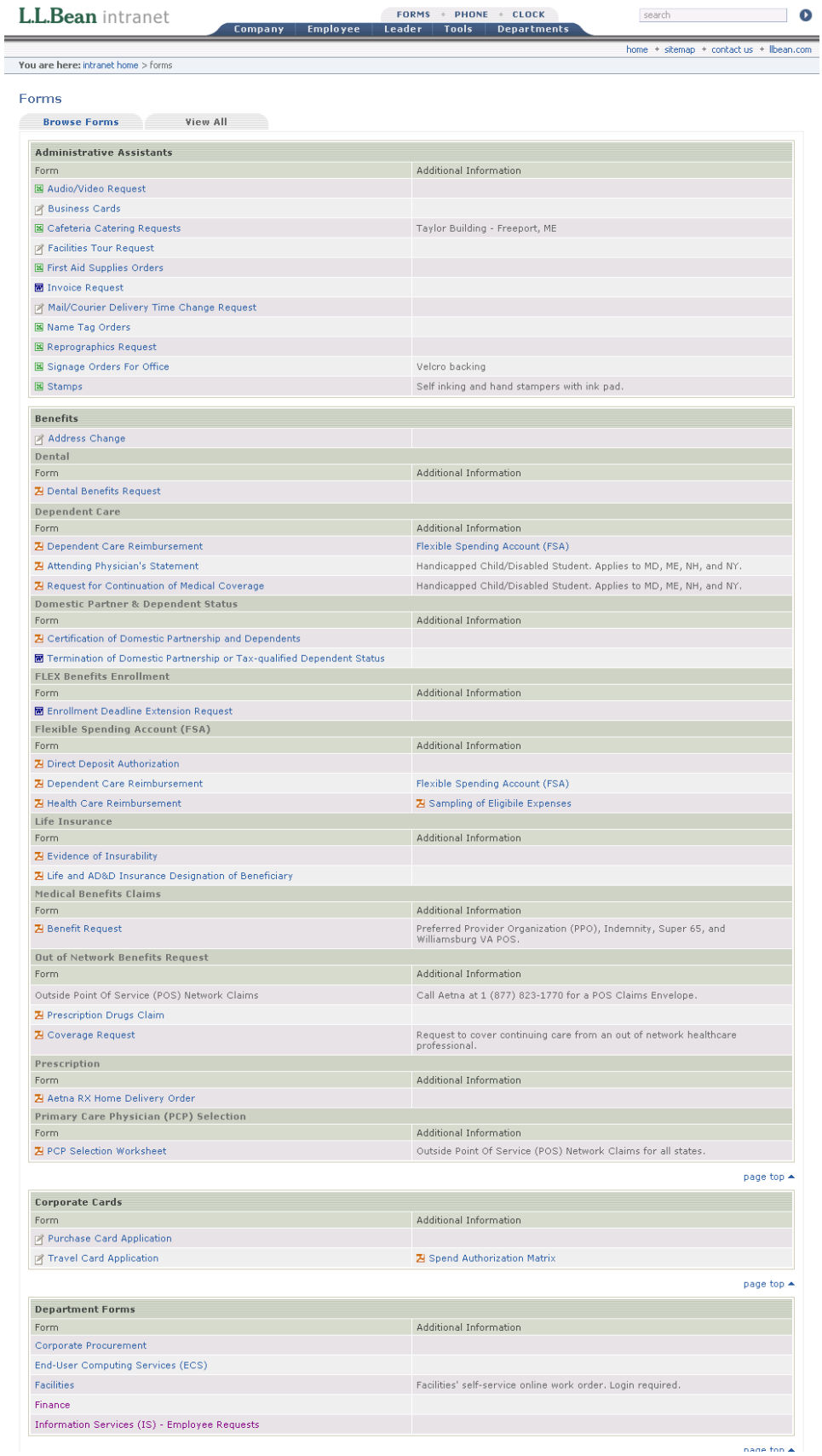
When users click a link in the topics list in the top half of the page's content area, the bottom half of the content area changes, displaying the topic area name followed by links to all of that topic's forms. The area also includes an *Additional Information* section for various forms.



Pictured: Users can browse the list of forms by category headings. The forms in the selected category are displayed in the bottom half of the page.

Alternatively, users can choose the *View All* tab view. This presents the same forms as the *Browse Forms* tab, but offers them in one long list. This option can help users who know the exact name of the form they need, as well as those who are less familiar with the category names.

10 Best Intranets: L.L.Bean



L.L.Bean intranet

FORMS • PHONE • CLOCK

search

Company | Employee | Leader | Tools | Departments

home • sitemap • contact us • llbean.com

You are here: intranet home > forms

Forms

Browse Forms | View All

Administrative Assistants	
Form	Additional Information
Audio/Video Request	
Business Cards	
Cafeteria Catering Requests	Taylor Building - Freeport, ME
Facilities Tour Request	
First Aid Supplies Orders	
Invoice Request	
Mail/Courier Delivery Time Change Request	
Name Tag Orders	
Reprographics Request	
Signage Orders For Office	Velcro backing
Stamps	Self inking and hand stampers with ink pad.

Benefits	
Address Change	
Dental	
Form	Additional Information
Dental Benefits Request	
Dependent Care	
Form	Additional Information
Dependent Care Reimbursement	Flexible Spending Account (FSA)
Attending Physician's Statement	Handicapped Child/Disabled Student. Applies to MD, ME, NH, and NY.
Request for Continuation of Medical Coverage	Handicapped Child/Disabled Student. Applies to MD, ME, NH, and NY.
Domestic Partner & Dependent Status	
Form	Additional Information
Certification of Domestic Partnership and Dependents	
Termination of Domestic Partnership or Tax-qualified Dependent Status	
FLEX Benefits Enrollment	
Form	Additional Information
Enrollment Deadline Extension Request	
Flexible Spending Account (FSA)	
Form	Additional Information
Direct Deposit Authorization	
Dependent Care Reimbursement	Flexible Spending Account (FSA)
Health Care Reimbursement	Sampling of Eligibile Expenses
Life Insurance	
Form	Additional Information
Evidence of Insurability	
Life and AD&D Insurance Designation of Beneficiary	
Medical Benefits Claims	
Form	Additional Information
Benefit Request	Preferred Provider Organization (PPO), Indemnity, Super 65, and Williamsburg VA POS.
Out of Network Benefits Request	
Form	Additional Information
Outside Point Of Service (POS) Network Claims	Call Aetna at 1 (877) 823-1770 for a POS Claims Envelope.
Prescription Drugs Claim	
Coverage Request	Request to cover continuing care from an out of network healthcare professional.
Prescription	
Form	Additional Information
Aetna RX Home Delivery Order	
Primary Care Physician (PCP) Selection	
Form	Additional Information
PCP Selection Worksheet	Outside Point Of Service (POS) Network Claims for all states.

page top

Corporate Cards	
Form	Additional Information
Purchase Card Application	
Travel Card Application	Spend Authorization Matrix

page top

Department Forms	
Form	Additional Information
Corporate Procurement	
End-User Computing Services (ECS)	
Facilities	Facilities' self-service online work order. Login required.
Finance	
Information Services (IS) - Employee Requests	

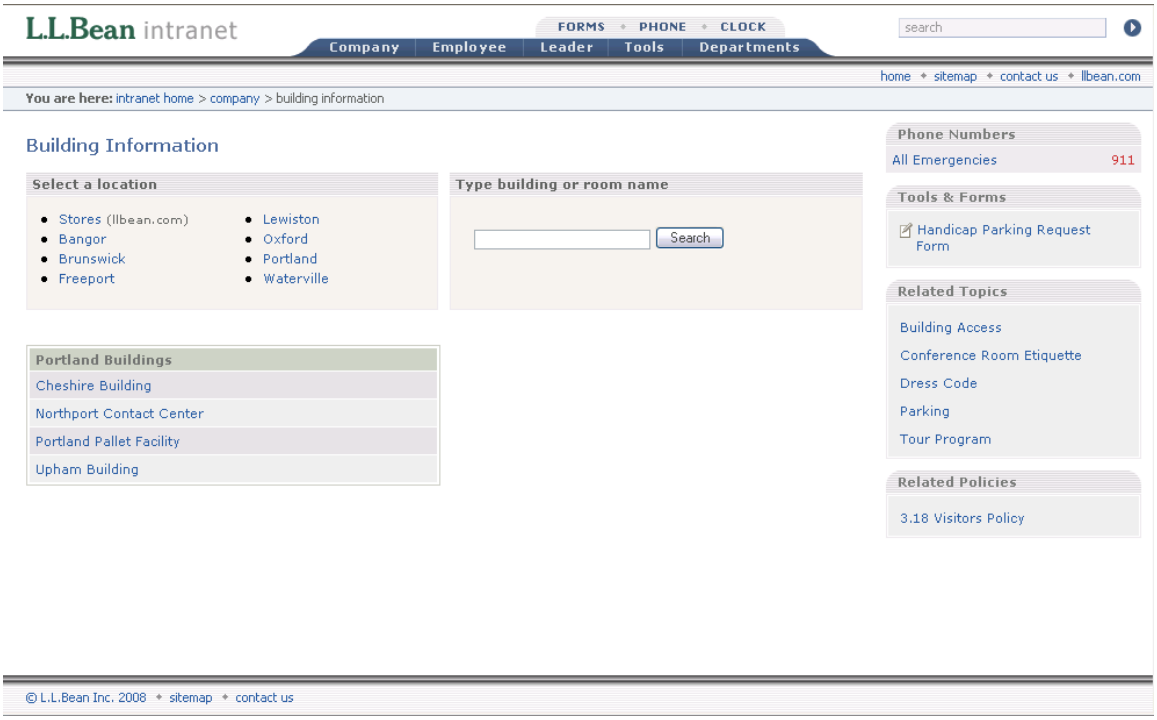
page top

10 Best Intranets: L.L.Bean

Pictured: Users can view all of the offered forms at once via the *View All* tab.

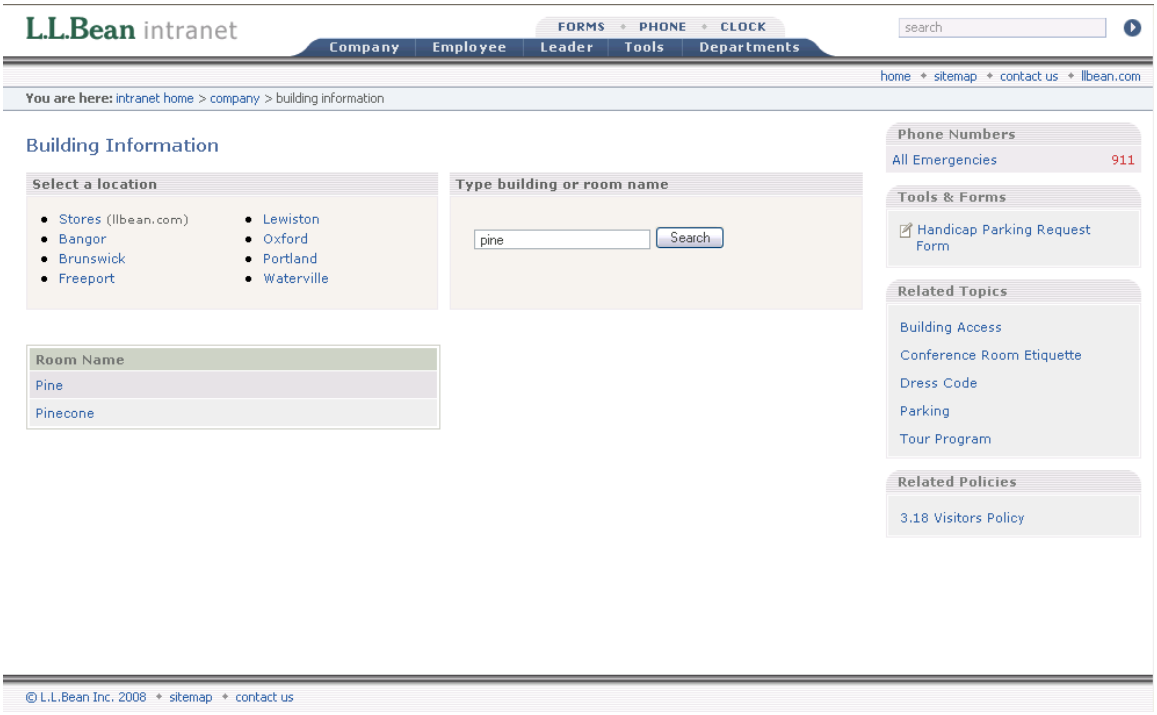
When employees visit different offices and stores, they need to find places to have meetings in those locations. The *Building Information* tool is one that is often used and well received by L.L.Bean employees.

On the *Building Information* main page, users can select from a list of links for each city or town. it's easy to sort through them. When selected, the list of buildings in that town is displayed. Users can also use the building search function and type in the open field. Results are displayed below.



Pictured: Users can browse for buildings in the *Select a location* box. Once selected, the screen displays a list of that city's buildings.

10 Best Intranets: L.L.Bean



Pictured: Users can also use the building *Search* tool. Results are displayed below.

Once in a building's details page, the user can see several elements, including the building's name, code, address, hours, telephone hours, and the telephone numbers and extensions for reception and security.

The left-side context menu offers many other choices. Users can get information about the cafeteria and the fitness room—one or both of which employees often care a lot about. In addition to getting basic building and room information such as hours and a description, users can get directions, find out about appropriate attire, and learn about meeting rooms and their features, such as their capacity and equipment, including whether they have a TV, VCR-DVD, network access, and so on.

Designers knew this section would have required hundreds of hard-coded pages that would have been challenging to update. To alleviate this, they decided to dynamically generate the page for each building or room from the flat file, which is easily updated in one place via MS Excel.

The right contextual navigation—here and throughout the L.L.Bean intranet—provides links to the supporting documents pertaining to each page's content. Categories make it easy for users to scan the links and find the particular resource they're seeking. The right navigation includes:

- *Phone Numbers* (contact information)
- *Tools & Forms* (for files relevant to the content)
- *Related Topics* (similar topics or topics that also reference the content)
- *Related Policies* (*Company Policies & Guidelines* related to the target content)
- *External Websites* (access to resources outside of the company intranet)

10 Best Intranets: L.L.Bean



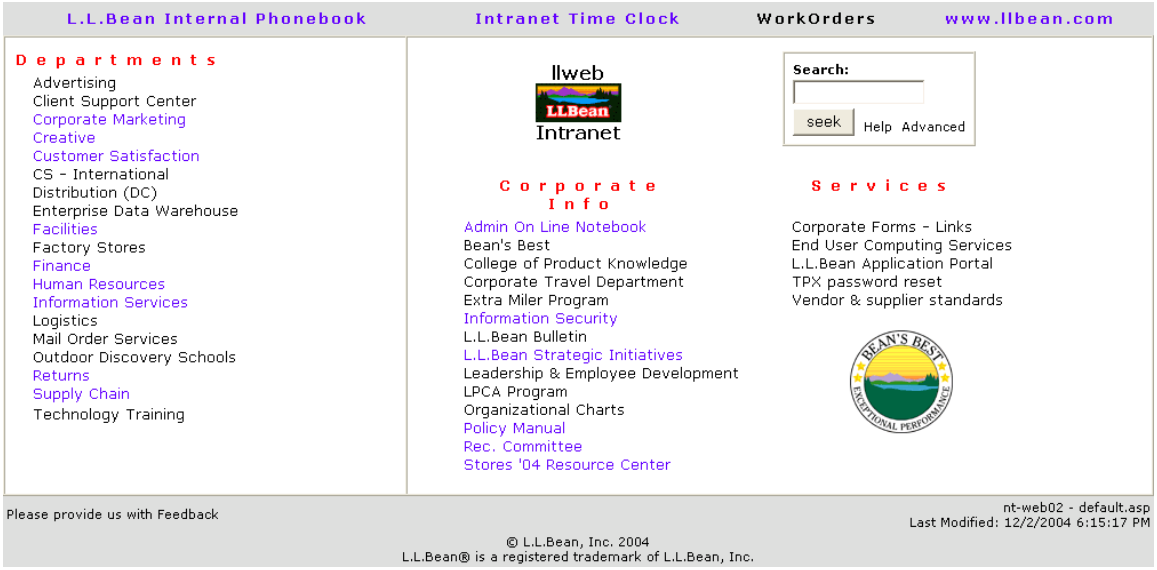
Pictured: Basic building details include the building's name, address, and hours for the office and phone lines; a photo; and the main number and extensions for reception and security. More detailed information is available through the context-navigation options on the right.

Good intranet designers are inventive and determined. They don't give up when presented with a challenge. The L.L.Bean designers worked together through barriers they faced, employing creativity and ingenuity to create an intranet that readily informs and communicates.

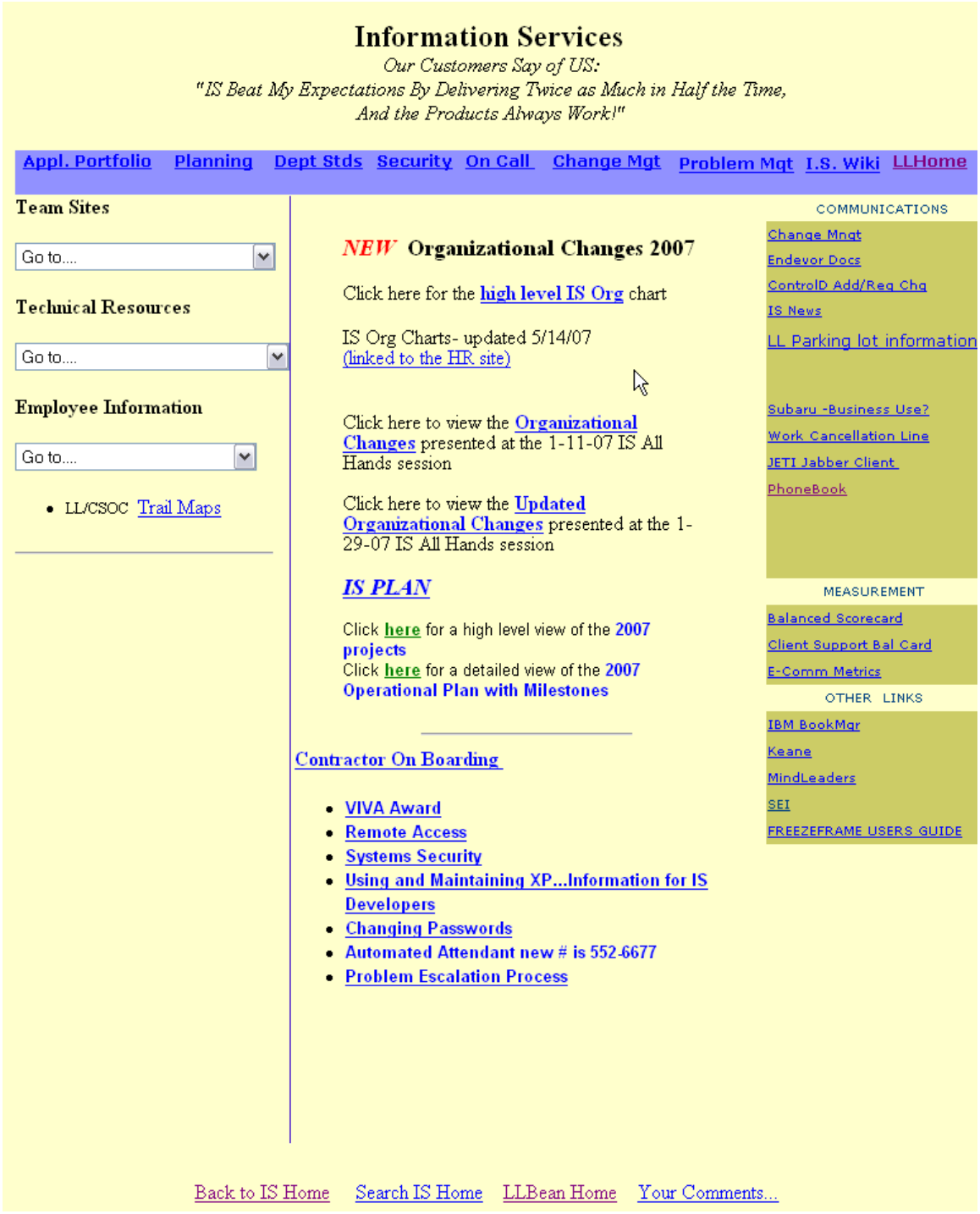
BACKGROUND

The L.L.Bean intranet has had a long life—and, like most corporate intranets, it began humbly in the mid 1990s and grew organically. "When something new was needed, a subject matter expert or admin added it with [Microsoft] FrontPage," says Leah Fitch, lead intranet designer. "Initially, there was no use of CSS or metadata, and all development was done in FrontPage using *Normal View*. Each department employed unique and often hodge-podge designs."

10 Best Intranets: L.L.Bean



Pictured: The original L.L.Bean intranet homepage. The page's purpose was to provide access to all of the department sites and some important company information.



Pictured: An example of an old stand-alone department site with a completely different look and feel—and no way to navigate to the corporate intranet.

10 Best Intranets: L.L.Bean



Pictured: Another stand-alone department site on the old intranet.

The HR site slowly became the go-to place for corporate information relating to employee benefits and offerings. “It also grew organically, with more and more links added to the homepage,” says John Vincent, intranet administrator.

10 Best Intranets: L.L.Bean



Pictured: This screen from the old site highlights the mixture of fonts, icons, and green text links, as well as a long, two-column scrolling page that kept most of the key information below the virtual fold.

10 Best Intranets: L.L.Bean

By 2001, L.L.Bean had become a billion-dollar company, but rather than having a centralized corporate intranet to support it, it had only a homepage that linked out to a variety of disparate department sites. "The primary role of the intranet administrators at the time was to maintain the status quo and to support the Web publishers—over 200 of them," says Vincent.

In June 2004, the communications department was reorganized and Fitch was brought on to maintain the current site and to address increasing internal Web design needs from across the organization. “At the time, there was no formal process and requests were done without any task analysis, user studies, or prototypes,” she says. “The requests were simply built and launched. I campaigned with the director of the department at the time to formalize the discipline of intranet design and Web design."

As a designer with extensive Web design and user testing experience, Fitch began to advocate for the adoption of formal Web production processes and introduced the concept of usability methods to the organization. Up until that time, the team had no formal training in user-centered design.

“I advocated to send the current staff to training and seminars and eventually was made the leader of the group,” says Fitch. “I put in place standard operating procedures and brought in more up-to-date tools for building sites. I also demonstrated the various usability methods beginning with paper prototypes.”

Under her guidance, the team proceeded to do an inventory of corporate information. After an initial categorization was completed, the team created a more structured homepage layout with drop-down menus. The new homepage contained news articles, top navigation, left navigation, and search.

10 Best Intranets: L.L.Bean



Pictured: "This was one of our first redesigns of the original company homepage," says Fitch. "The page became branded as 'L.L.Bean Today' where users could read the daily news, see current events and offerings, and begin to start using global navigation. The global navigation linked users to the old information and site designs."

10 Best Intranets: L.L.Bean

In 2006, the current intranet design team was formed and tasked with redesigning the HR department site's content into a corporate intranet for all L.L.Bean employees. Its mission was defined as “unifying the ‘intra-mess,’” as Linda Carew, the project manager, affectionately called it. It was through their efforts that formal Web production processes, usability methodologies, and Web writing standards were implemented. Intranet development became a formal discipline within the department—and, for the first time, within the company.

Finding Inspiration

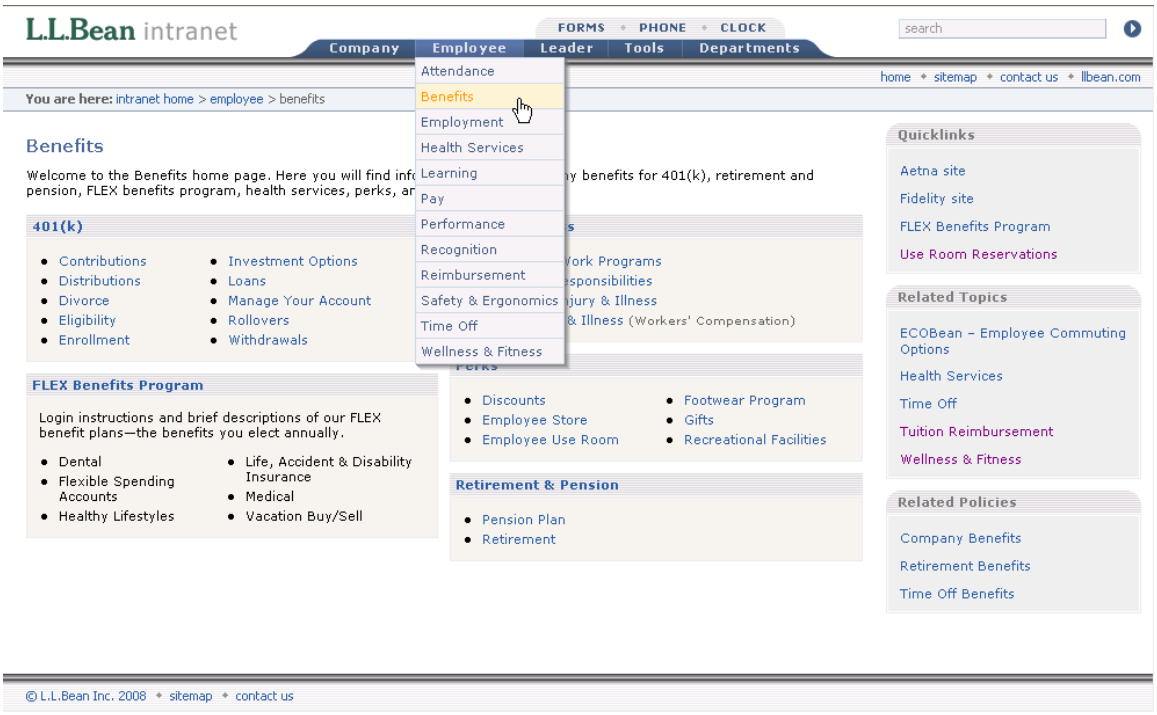
In 2005 and 2006, members of the intranet team attended a number of usability conferences, most notably the NN/g Usability Boot Camps in New York and San Francisco, and the Adaptive Path User Experience Week in Washington, DC.

“We came away energized and armed with knowledge to begin a formalized/structured process for Web development,” says Fitch. “Having attended these sessions gave us more credibility and the language to get buy-in and support from management. Each step of the process produced results that enlightened management and further reinforced the importance and value of thorough user testing at each phase.”

The project to develop the current site (featured here) began in June 2006 after a planning phase. “The L.L.Bean intranet represented in this entry is the result of over a year of field studies, card sorting, user testing, and Web development,” says Fitch.

It was launched in August 2007.

10 Best Intranets: L.L.Bean



Pictured: A screen showing how the user would navigate using the global navigation to a category page. The top navigation bar allows the user to navigate to the main sections and departments, search the intranet, and access forms and the site map. Categories are organized under the main tabs of *Company*, *Employee*, *Leader*, *Tools*, and *Departments* using a Milonic drop-down menu. There is only one level of drop-down; through testing, the team learned that users found secondary fly-out levels unwieldy.

INTRANET TEAM

The L.L.Bean intranet team consists of three intranet designers, an intranet administrator, and a project manager. “We also had a dedicated content editor who oversaw the assigning and editing of old and new content,” says Fitch. The intranet team is part of the Corporate Communications department within HR.

HR manages the intranet portion represented in this report; departments throughout the company manage their own separate department sites. “It was the support of the HR senior leadership team that paved the way for a comprehensive redesign to bring together all corporate information,” says Fitch.



Pictured: (left to right) Linda Carew, Laurie Gonyea, Leah Fitch, John Vincent, and Melissa Coleman.

Budget

"Budget? What budget?" says Fitch mockingly. "There is no project budget aside from salary."

She explains: "Our intranet administrator's skills in both front and backend coding enabled us to creatively design dynamic content using flat file data. Our designers are committed to abide by all usability standards. Everything is created by hand (templates, prototypes, testing materials) or coded using Dreamweaver. Our project manager quickly embraced the process—becoming the primary communication liaison between team, stakeholders (testers, HR, help desk, news), and our sponsors."

"Portal and CMS solutions are always on the table, and we're hopeful that it will be realized someday," she says. "However, it has never made the cut when the final budgetary decisions are made. We continue to look for ways to upgrade our technology."

GOALS AND CONSTRAINTS

The primary goal of the intranet is to organize content into the three meaningful groups selected by users:

- **Employee information** including perks, learning opportunities, wellness offerings, jobs, health, and benefits.
- **Company information** including org charts, corporate initiatives, business information, building information, and policies.
- **Tools** including forms, tutorials, and links to online applications.

Constraints

As discussed earlier, the team works with no project budget, just staff. With no budget, they have to do both discount usability *and* discount programming.

Everything is Hand-Coded

Currently, the L.L.Bean intranet has no CMS, portal solution, relational database, or other dynamic backend systems to automate workflow. All content is entered by hand into its appropriate template using Dreamweaver.

"During the redesign, we coded about 1,250 Web pages, and used programming to dynamically generate another several hundred pages in the *Building Information* section," says Vincent.

The lack of dynamic back-end systems is not apparent to the users, as gauged by this user comment from the IT team:

> *"I am curious as to what software was used to design the new Intranet? The look and feel reminds me of some of the CRM applications I have worked with in the past and am curious if this is the case here. The new layout is much more organized and the nav is more intuitive. Keep up the great work, you are very much appreciated!"*

And the intranet team's reply?

> *"No fancy software… all hand-coded by our team!"*

No Usability Tools

"There are no usability tools in-house such as Morae, or a lab with closed-circuit video," says Fitch. All testing was done either locally at the user workstations or in a conference room with a single computer for one-on-one prototype testing. And all testing materials were created and compiled by hand.

TIMELINE

REDESIGN PROJECT TIMELINE	
2006	
April–June	• Project planning: established project charter, vision, goals, and a high-level timeline; identified resources and assessed risks
July–August	• Card sorting (began June 29) • Began content categorization
September	• Field studies • Categorization continued
October	• Official kick-off meeting with management; resources committed • Management presentation on card sorting and field study results (how users think) • SMEs and editor identified and trained to edit content for Web presentation • Categorization continued
November	• Finished content categorization • Paper prototypes (four revisions) • Began content development by SMEs as identified in initial

	rounds of paper prototype testing
December	• Planned wireframe build (HTML code and template development)
2007	
January	• Finished content development • Began building wireframe v.1
February	• Developed communication plan • Built wireframe v.1 and entered content
March–April	• Tested wireframe v.1 (three revisions)
May	• Designed complex sections, including news, building information, forms page, learning, and lending library
June	• Tested wireframe v.2 (two revisions)
July	• Look-and-feel (design) phase • Beta launch (to a group of employees from various departments) • Implementation of a QA process • QA testing and bug fixing
August	• Tested wireframe v.3 (one revision) • Designed scavenger hunt • Launched site (August 13) with online scavenger hunt to help orient users
2008	
February	• Post mortem user testing to compare success rate data with original site testing; results: 52% improvement in time needed to locate page

USERS

L.L.Bean's intranet users included operational users who mostly access the intranet from kiosk locations and non-operations staff that have computer access. The user roles break down as follows.

Operational. Most operational users have limited computer access via kiosks and include:

- Customer service (has computer access)
- Distribution
- Returns
- Manufacturing
- Facilities
- Retail/outlet
- Security

Non-Operational. Most non-operational users have computer access and include:

- HR
- Merchandising
- Finance
- IT
- Marketing
- Creative
- E-commerce
- Supply chain
- Direct to business
- Public affairs

USER TASKS

The L.L.Bean intranet content includes everything from the daily news and calendar of events to detailed information about benefits, health services, employee and leader development, and wellness and fitness. Employees use the site to access information about benefits, perks (such as discounts, recreational facilities, and lotteries), and forms (including those for reimbursement, equipment requests, wellness, and learning classes).

The following are among the site's most popular features:

- Daily news articles
- Company information and sales data
- The phone directory (this independent site is the most frequently used online resource, and isn't administered by the intranet team)
- The *Building Information* section

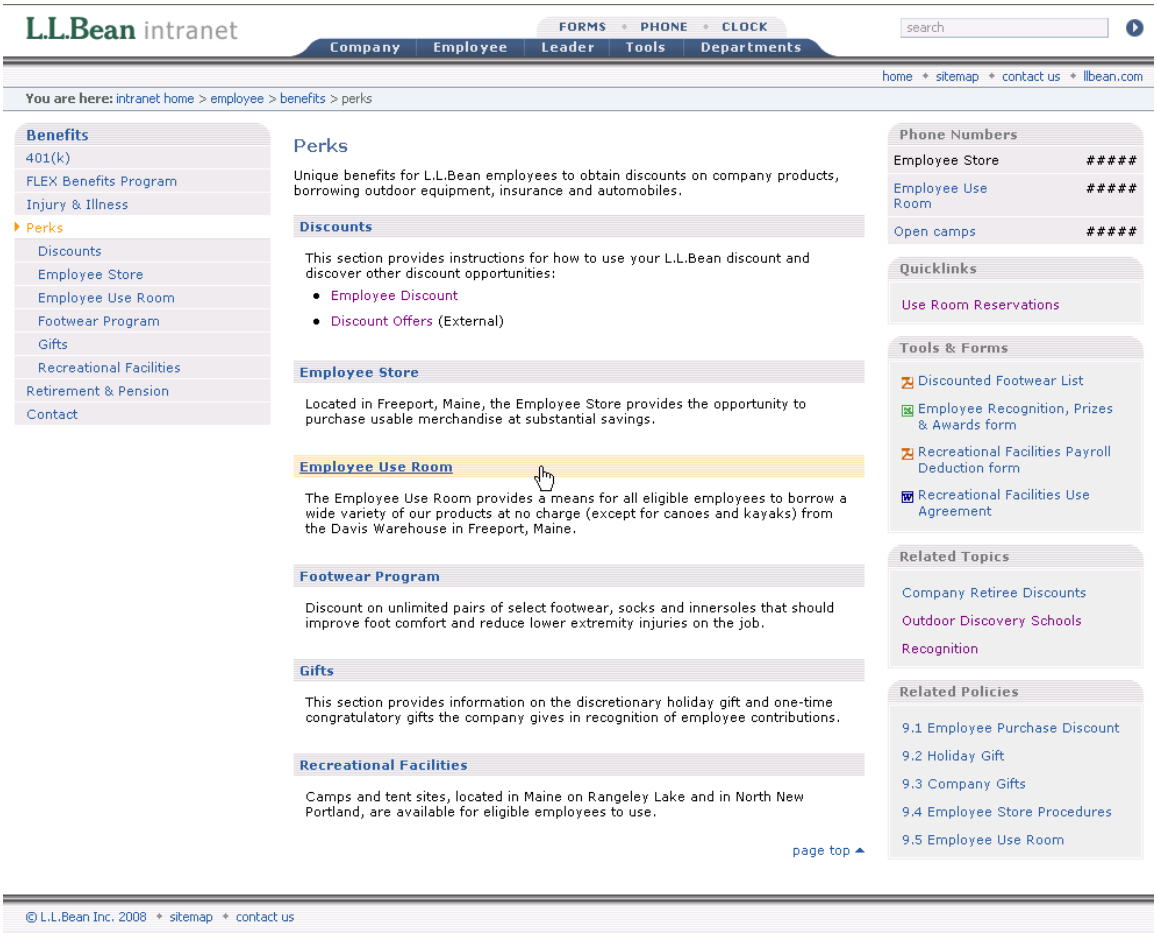
The team determined the most popular features based on information from a variety of resources, including:

- *Contact Us* feedback forms
- Survey results
- Unsolicited comments/e-mails to intranet team
- User testing (all phases)



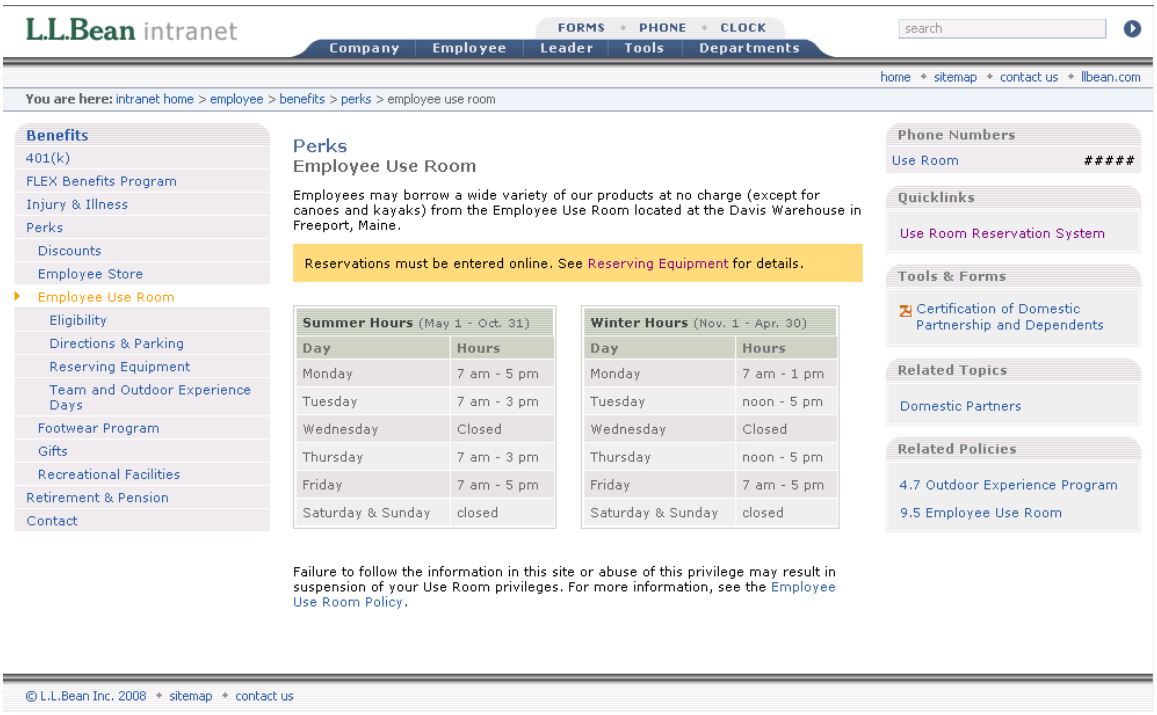
Pictured: The *Daily image* news page. News items for each day are highlighted on the homepage. When users click an item, they enter the *News* section, which has a tree-menu navigation and archives organized by day, month, and year.

10 Best Intranets: L.L.Bean



Pictured: The *Perks* content section within the *Benefits* section.

10 Best Intranets: L.L.Bean



Pictured: The *Perk* section's *Employee Use Room* topic. The left navigation lets users drill down into specific categories.

DESIGN PROCESS AND USABILITY ACTIVITIES

The impetus for starting the intranet project was a reorganization of the HR department. This reorganization centralized the HR function into one location, rather than having it spread throughout the company. "We needed employees to be able to self-serve in terms of accessing information—therefore, the need for a corporate intranet," says Fitch.

"There was a commitment among the team to develop a user-focused, user-centric website," she says. "We were faced with the challenge of finding, organizing, and surfacing company- and employee-focused content that was hidden in a vast network of independent sites—the 'intra-mess.'"

Fitch also notes that, in addition to being hard to find, content was often repetitious, outdated, and contradictory.

The team began their work by drawing up a list of the 15 most common help desk (HR and IT Support) calls and turning those issues into user tasks. With those tasks as a starting point, they visited employees in various parts of the organization to see how they were trying to accomplish the tasks.

"We found that the old intranet content was not organized from the end user's perspective: it was organized from the content owner's perspective," says Fitch.

Most of the content on the site was print content that had just been repurposed for the Web without any thought to how it would be used online. "Usually," she says, "this was done by an admin or someone who had no HTML or Web design training and was doing this as a side project."

The content was not written so that users could easily scan a page to find relevant content and it wasn't written in a style conducive to task-based findability. "Content was written in long blocks of paragraphs, with a lot of philosophy statements and few

headings," says Fitch. The content was department-centric and there was no contextual information or global navigation.

"Sometimes, you would link to a Web page that lacked a title in the browser, title on the page, and local navigation back to where you had linked from," she says. "Many were documents saved off as HTML format and uploaded as is."

And search wasn't very useful because there was little metadata and the content's basic composition was problematic. "Sometimes," Fitch notes, the content was simply "memos without any titles."

Fitch took those initial findings (along with card sorting results) to the project sponsors to show the value of the testing methods and to demonstrate that her team could change the site to help people be more productive.

"We had several sponsor meetings showing the data, with slides and photos showing the constraints and the hurdles people had to go through to find information," she says. "Those presentations helped to convince our sponsors to let the team take the time needed to do things the right way.

"They were convinced of the value of following a formal Web process and usability methods," she says.

Usability Methods

Usability methods that the team employed included: card sorting, field studies, categorization, paper prototype testing, a Web writing tutorial for SMEs, and digital wireframe testing. "We had a dedicated conference room for display of materials that allowed sponsors to see the scope of the project," says Fitch.

They taped the cards to the wall to help them see the information and to help with moving topics around. The team left the information on the walls throughout the month-long process; doing so proved to be a great way to generate enthusiasm and conversation about the project.



Pictured: The intranet team analyzing the topic cards and building the categorization.

Card Sorting: Learning the Vernacular

The team compiled an inventory of all HR and company content, and then wrote the content topics on index cards. The team went to all areas of the company—both operational and non-operational—and watched as groups of employees organized content and labeled the groupings. "This helped us define contextual and related content for the coming prototypes," says Fitch.

"We found that card sorting is more effective when done in groups of two or more people," she says. "Individuals can get stuck whereas a group can debate and come to an agreement on the various ways something can be organized."

Through this exercise, the team learned about how people talk about certain topics. For example, certain company offerings, such as the employee discount, the employee use room (where employees can borrow outdoor equipment), and recreational facilities (including L.L.Bean's several camping facilities) were mixed in with other benefits, like health insurance and 401(k). "All tested groups, irrespective of business unit, grouped these topics under the benefits category in a section called *Perks*," says Fitch. "So, we went with it—and it has been very successful."



Pictured: Two groups of two users sort through topic cards while an intranet designer observes.

Categorization

The team spent more than a month organizing and cataloging the card sorting results. As Fitch explains, team members did this in several steps:

- They created a visual matrix of posters that contained similar category names and the cards associated with them.
- They counted how many times a card appeared under a category. When a card was distributed more-or-less equally under two categories, the content was duplicated in both places or a related topic was added.
- A categorization document was created that served as the basis for preparing paper prototypes.

Usability Studies at the User's Site: Words Matter

More traditional field studies are a great method for learning about users, the tools they use, and the tasks they choose to do. In true field study methodology, facilitators follow users around as they work; they give users no tasks, but simply observe. The L.L.Bean team decided to do some usability studies, but at users' work sites in the field.

There are a few reasons for doing this kind of task-based study:

It's good to see people work through tasks on their own machines and workstations, in their own environment.

It's often easier to get usability testers to agree to participate if the tester comes to them. (This isn't always possible when users don't work for the same company, but is a special bonus of testing intranets.)

If you really want to watch people using the interface and doing particular tasks, you usually have to ask them to do it and give them good, non-leading tasks. If you just let people do what they want, they might not use features you need to test at a particular time in the development cycle.

In the case of L.L.Bean, there was no set space, such as a lab, to run the studies.

To conduct test sessions, the L.L.Bean team:

- Identified users from all business unit areas
- Created tasks based on the most common issues users experienced while trying to retrieve information on the intranet
- Created observer templates
- Visited users in their workplace and, during tests, they used stopwatches to time tasks, counted clicks, and recorded where users went to try and retrieve the information to complete their tasks

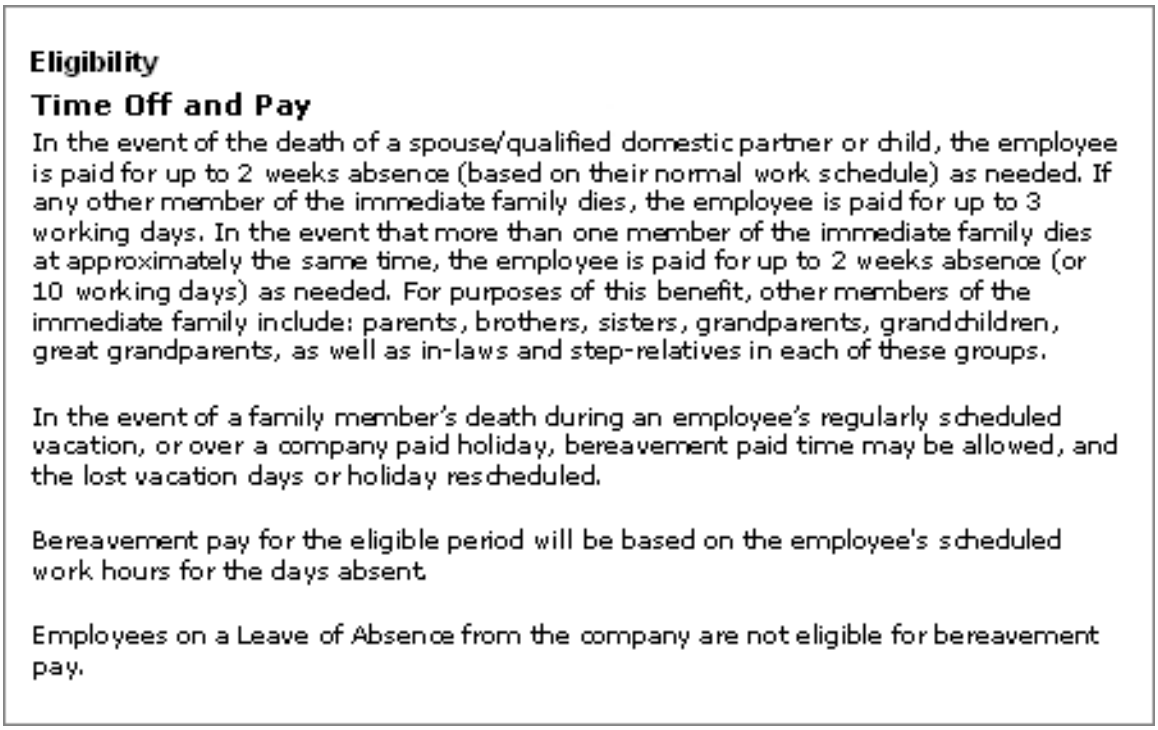
The team created tasks from the 15 most common issues handled by the HR and IT Support help desks. This is an excellent way to make use of the complaints and questions that help teams are all too familiar with. Members of Fitch's team went to user workstations to watch how employees used the intranet to find the information. They tracked time and user comments, paying particular attention to the nomenclature people used. For example, one of the tasks was "find the time off policy for attending a funeral of a colleague." This information was located in the *Bereavement Policy*. When browsing the list of policies, Fitch says users skipped right over the word "Bereavement."

"We watched testers using search to locate this information. Not once did the term 'bereavement' get entered in the search field," she says. "The term commonly used was 'death.'" Search yielded no relevant results because 'death' wasn't in the policy content.

The testers asked users why they had skipped over the word "bereavement." Most said they weren't familiar with the term. "We changed the policy title to 'Death and Bereavement,' and enhanced the metadata keywords to include dead, death, and funeral," says Fitch.

By making these changes, users were able to find the content. For the team, this effort solidified the importance of writing for the Web and choosing the types of words that users themselves actually use.

"This task also confirmed the importance of how content must be written for the Web," says Fitch. However, even the few users who originally located the correct policy were unable to find the time allotment for this type of funeral because the company's policy on it was buried in long blocks of text. Fitch's team solved the problem by using a table. "Once we placed the information into a table, users found the information quickly," she says.



Eligibility

Time Off and Pay

In the event of the death of a spouse/qualified domestic partner or child, the employee is paid for up to 2 weeks absence (based on their normal work schedule) as needed. If any other member of the immediate family dies, the employee is paid for up to 3 working days. In the event that more than one member of the immediate family dies at approximately the same time, the employee is paid for up to 2 weeks absence (or 10 working days) as needed. For purposes of this benefit, other members of the immediate family include: parents, brothers, sisters, grandparents, grandchildren, great grandparents, as well as in-laws and step-relatives in each of these groups.

In the event of a family member's death during an employee's regularly scheduled vacation, or over a company paid holiday, bereavement paid time may be allowed, and the lost vacation days or holiday rescheduled.

Bereavement pay for the eligible period will be based on the employee's scheduled work hours for the days absent.

Employees on a Leave of Absence from the company are not eligible for bereavement pay.

Pictured: The company's bereavement policy as it appeared on the site prior to user testing and content changes. Note the blocks of uninterrupted copy. During testing, users began at the top, but then jumped over the information they were looking for because the content wasn't scannable.

Time Off and Pay

In the event of the death:

Relationship to Deceased	Paid Time
Spouse/qualified domestic partner or child	Up to two weeks absence (based on their normal work schedule) as needed
Immediate family include: • parents • brothers • sisters • grandparents • grandchildren • great grandparents • in-laws • step-relatives	Three consecutive working days
If more than one member of the immediate family dies at approximately the same time.	Up to two weeks absence (or 10 working days) as needed
Close family member (not considered "immediate" by policy definition)	Time off to attend the funeral
Fellow employee or former L.L.Bean employee	Time off to attend the funeral
Friend	Unpaid time off may be granted to attend the funeral service

In the event of a family member's death during an employee's regularly scheduled vacation, or over a company paid holiday, bereavement paid time may be allowed, and the lost vacation days or holiday rescheduled.

Bereavement pay for the eligible period will be based on the employee's scheduled work hours for the days absent.

Pictured: The revised Web copy for the bereavement policy, after testing with users. The content is now in an easily scannable table design. During re-testing sessions, users found the time-off information immediately.



Pictured: A user with a small office required the intranet designer/observer to sit on the desk to conduct the test session.

Paper Prototype

The L.L.Bean team made a paper prototype using PowerPoint. They then conducted four rounds of paper prototype testing with three groups of five test subjects. This iterative testing and design helped them refine things to best match users' mindsets. "We quickly noticed that users preferred content to be clearly delimited within boxes," says Fitch. "This gave them a clear sense of where a subject started and ended. They used the paper prototype primarily to verify categorization and nomenclature of topics (headings and what to call links), and to identify content needs (what was missing or in need of editing). This last usage, says Fitch, helped the team define the SME list.

Three team members facilitated the test sessions:

- One observer served as the "human computer" presenting the screens or drafting new ones on the fly. This observer had a stack of blank paper and a pen in addition to all the prepared screens. As Fitch explains, "if the tester chose a path for which we had no screen prepared, the 'computer' would present a *Please Wait* screen with a little clock icon and proceed to draw the new screen and then present it to the user."
- One observer facilitated and recorded where the user "clicked"
- One observer recorded all user comments.

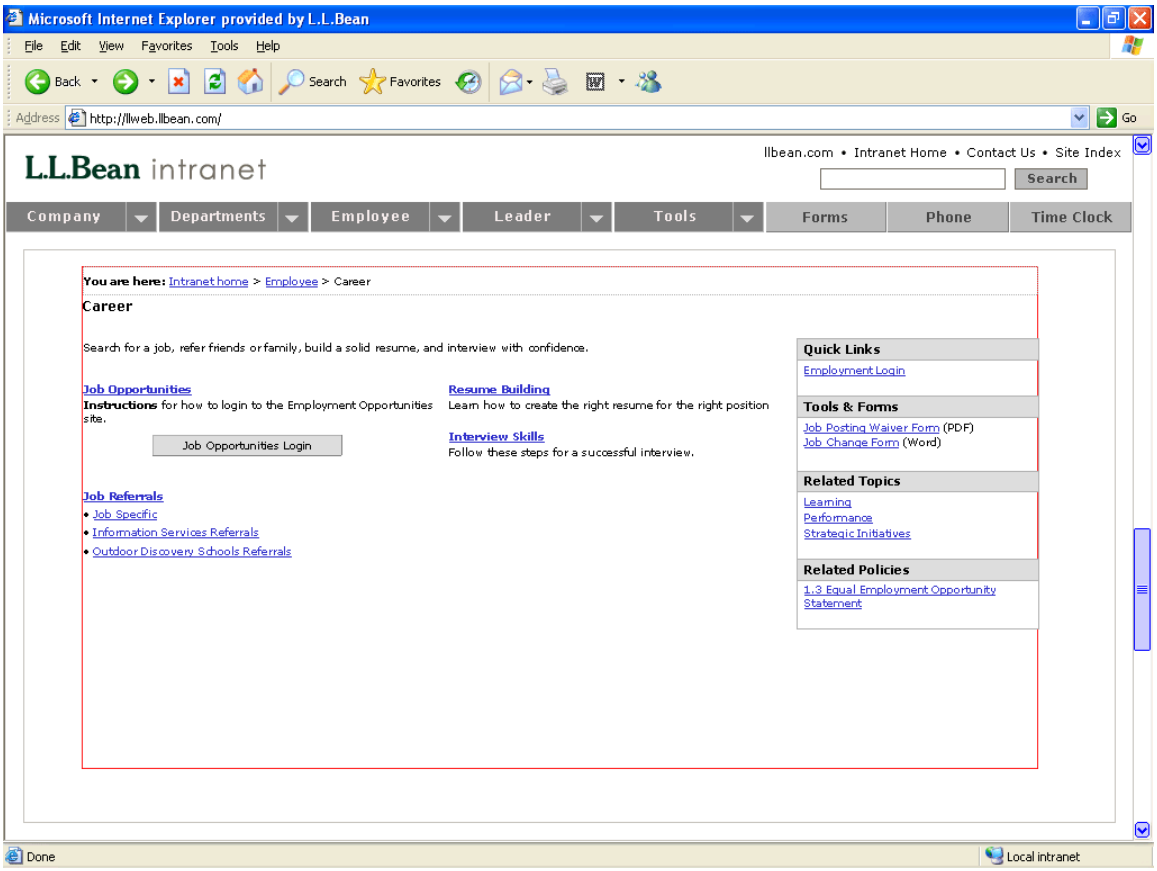


Pictured: Prototype test. Team member Melissa Coleman (in light blue t-shirt) acted as the "computer" and sat to the left of the test user (in red). Two other intranet designers (to the right of the test user) also conducted the session, while the project manager (across from the test user) observed.

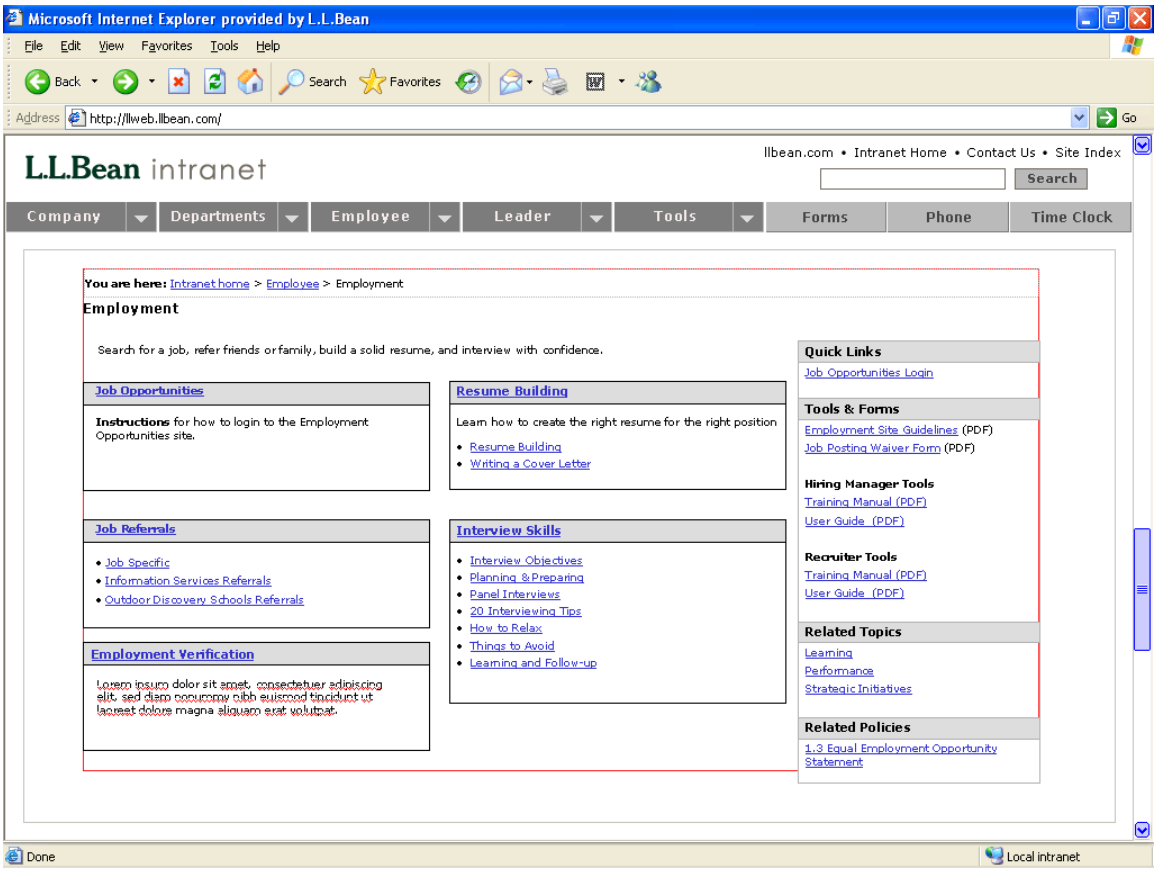
"The paper prototype helped reorganize some of the topics and categories," says Fitch, "and was a quick way to introduce new interface elements."

Beyond the IA issues, the paper prototype served, like many of the other tests, to identify issues with the existing content. It highlighted missing, incomplete, or poorly written content. "Most topics lacked clarity, some contained contradictory statements, and several just repeated the same statement over several paragraphs," says Fitch.

10 Best Intranets: L.L.Bean



Pictured: An example of the first paper prototype of a page that offered employees information about job opportunities.



Pictured: The last paper prototype round of testing. Designers added boxes to more clearly define various topic sections. The team changed the section's name—from "Career" to "Employment"—based on user feedback.

Content Development

Once all major site issues were ironed out, the team identified SMEs. They then tasked these SMEs with rewriting and editing existing content sections and creating new sections that had been identified as missing during the paper prototype phase.

Nearly all the team's usability methods had pointed to problems rooted in the content, so it made sense to conduct workshops on Web writing. They held a two-hour Web writing seminar with the SMEs to train them in a new workflow and help them learn the basics of better Web content writing.

A corporate communications editor was assigned to review content and establish a workflow whereby SMEs would submit content, have one-on-one meetings to review it with the editor, make edits, get approval from leadership, and resubmit. While this was going on, the Web designers were able to focus on testing.

Writing Content Takes Longer Than You Think

Through this content development process, the team learned a valuable lesson: Content writing takes time. "Content development takes much longer than you think," says Carew, "especially if your SMEs are doing their own jobs full-time."

"Getting content on time has always been a big issue," she says. "To minimize this, we had management hold meetings with content owners [the SMEs] in their areas

and make it a (temporary) expectation to accomplish this task as part of the intranet project."

"In the wireframe phase, SMEs were presented with tests results," she says. "Frequently, there was need for additional edits to old and new content which had to be validated through further testing."

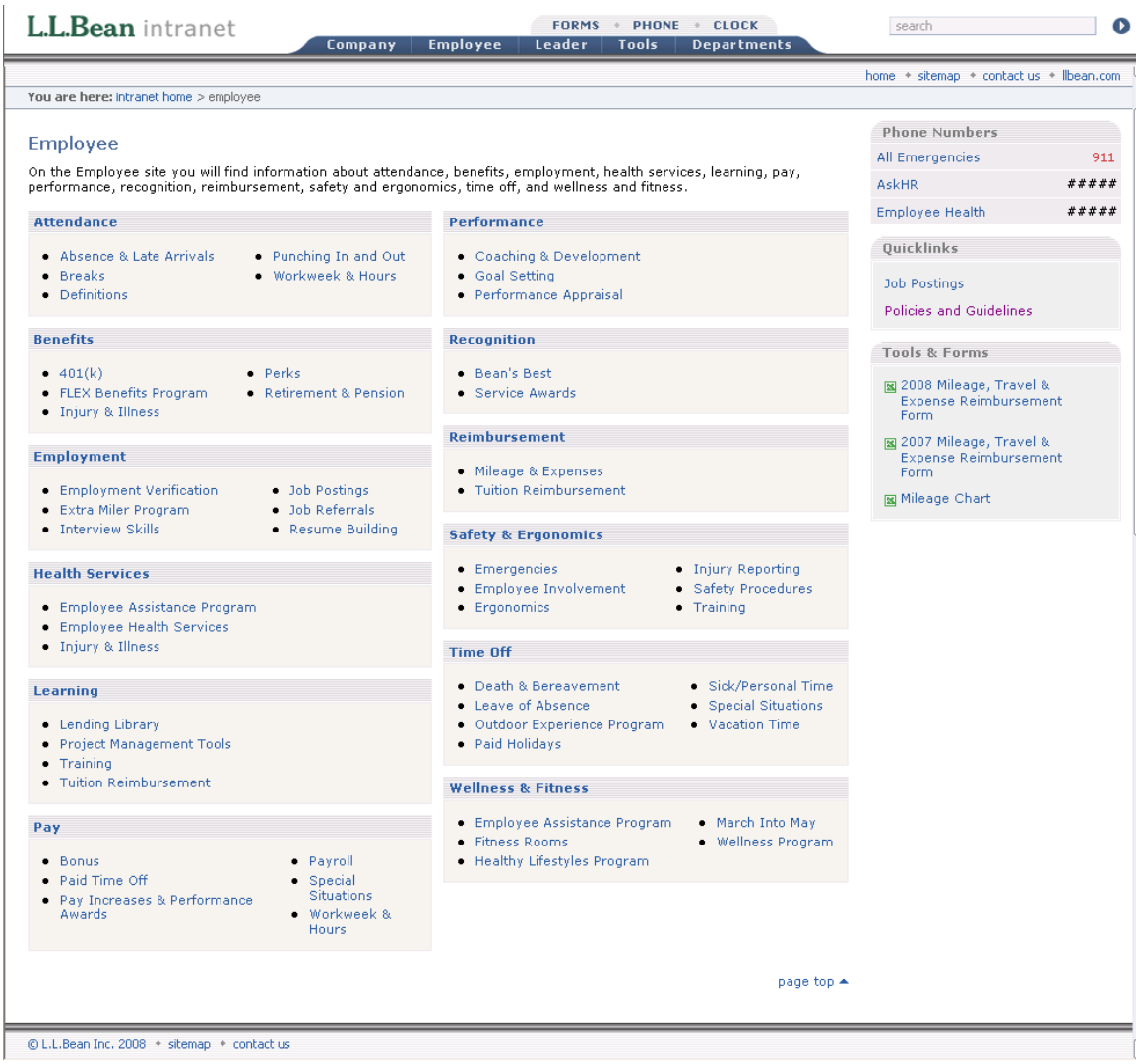
Carew notes that while SMEs were available for rewrites throughout the wireframe phase, content writing was never a part of people's jobs. From the outset, it was understood that the intranet project would need outside people to handle the content writing duties. Still, part of the intranet communications editor's job was to revise the SMEs' writing.

Even with this additional support, the timeline was still delayed due to the vast amount of content that needed to be tested or retested. Oftentimes, the content category organization was changed based on the paths users took to find the information during testing or "because content needed revising for completeness or clarity," says Carew.

"Once we were satisfied with how a topic was organized and that the content was clear and complete, we then proceeded to test other areas of the site," she says.

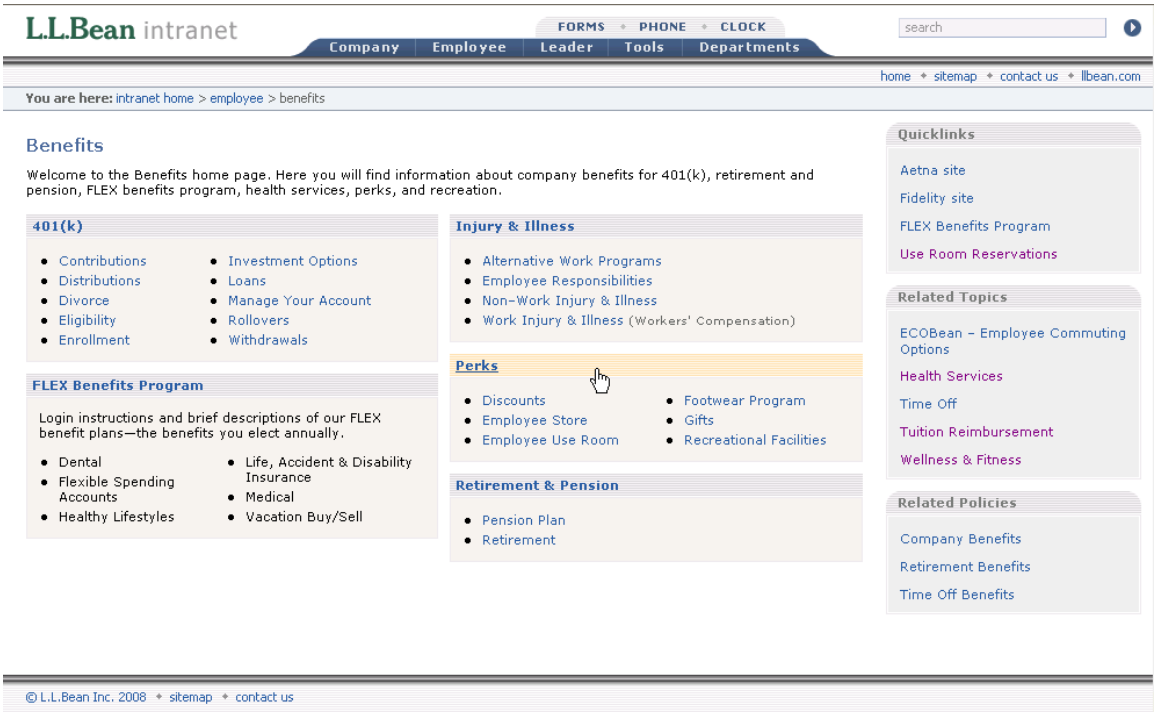
These loops consumed time and required resources to address the findings before they could move on.

10 Best Intranets: L.L.Bean



Pictured: A top-level *Employee* overview page. All overview pages function as a sitemap for their content and exist for each top-level category (*Company*, *Employee*, *Leader*, *Departments*, and *Tools*). The overview shows all the main sections within a category, along with links that let users jump directly to a section.

10 Best Intranets: L.L.Bean



Pictured: The *Benefits* overview page. Category overview pages show the sections and the next level down in the site structure with topic pages as links. Here again, users can go to the section homepage or drill down into a topic page.

Wireframes: Testing Content

The intranet team began building an HTML wireframe and entering all new and edited content into the templates. “While we debated using a digital HTML wireframe over the standard PowerPoint wireframe,” says Fitch, “the benefit was that the HTML version replicated the user experience of the medium exactly. During testing, users could click on links and go to the relevant pages.”

Rounds of wireframe testing let the team test as much of the content as possible. They conducted four rounds of iterative testing, changing tasks and the design as needed, as they went along. “For example, we started out with monochrome design and slowly added colors to sections of the interface or introduced interface elements,” says Fitch. “Through it all, new tasks were being created for testing as old tasks were dropped once our goals for success were achieved.”

Throughout the testing, the team invited the SMEs to review the test results so they could understand first-hand why users failed tasks based on how the content was structured. This helped the SMEs understand how users think, as well as the value of reorganizing content to help users. “This helped us get support from the content owners and approving managers,” says Fitch.

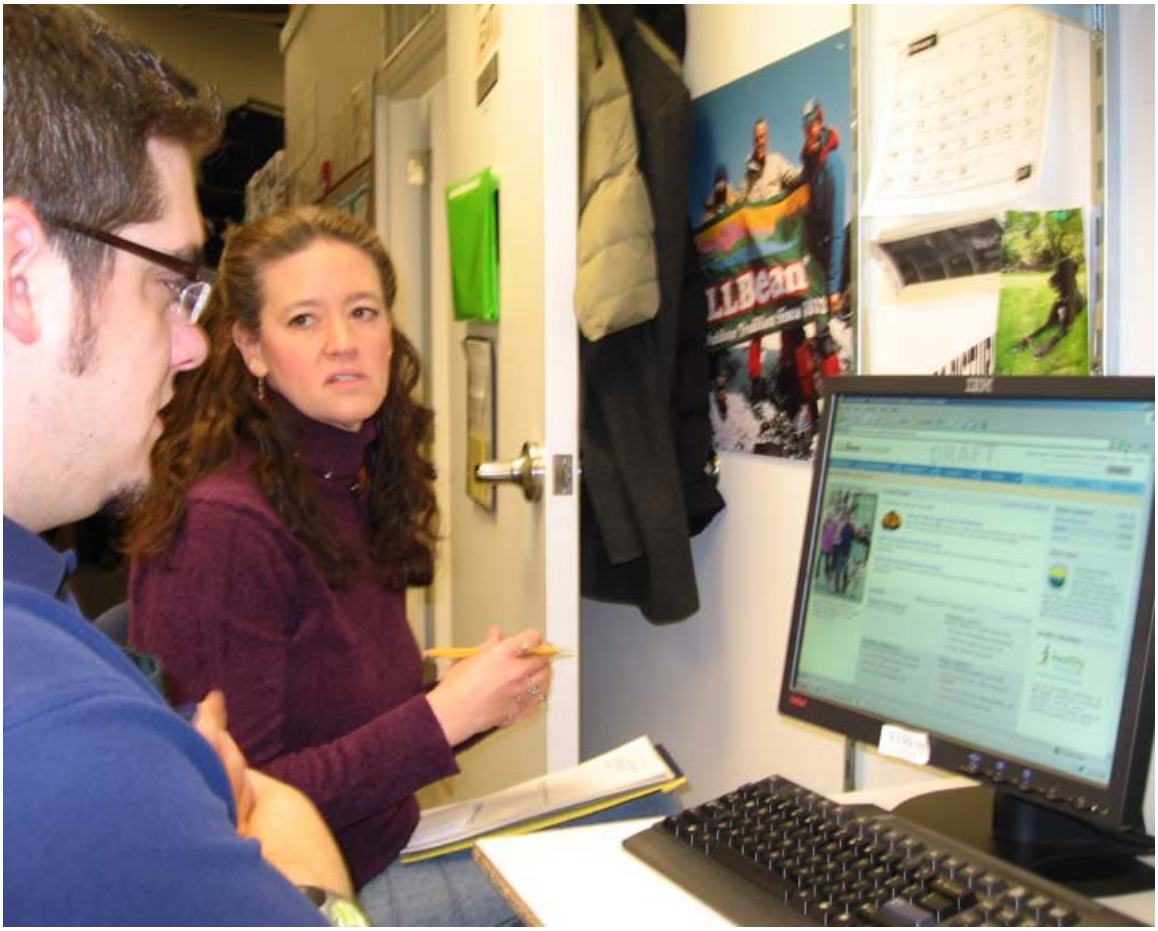
10 Best Intranets: L.L.Bean



Pictured: The HTML version of the wireframe for the section shown in the paper prototypes screens above.



Pictured: A revised version of the same wireframe. Among the changes were to remove the *Quicklinks* box and add a *Job Postings* category (because it was important for employees to read the log-in instructions for this section), as well as to change titles and replace the bullets with a blurb description.



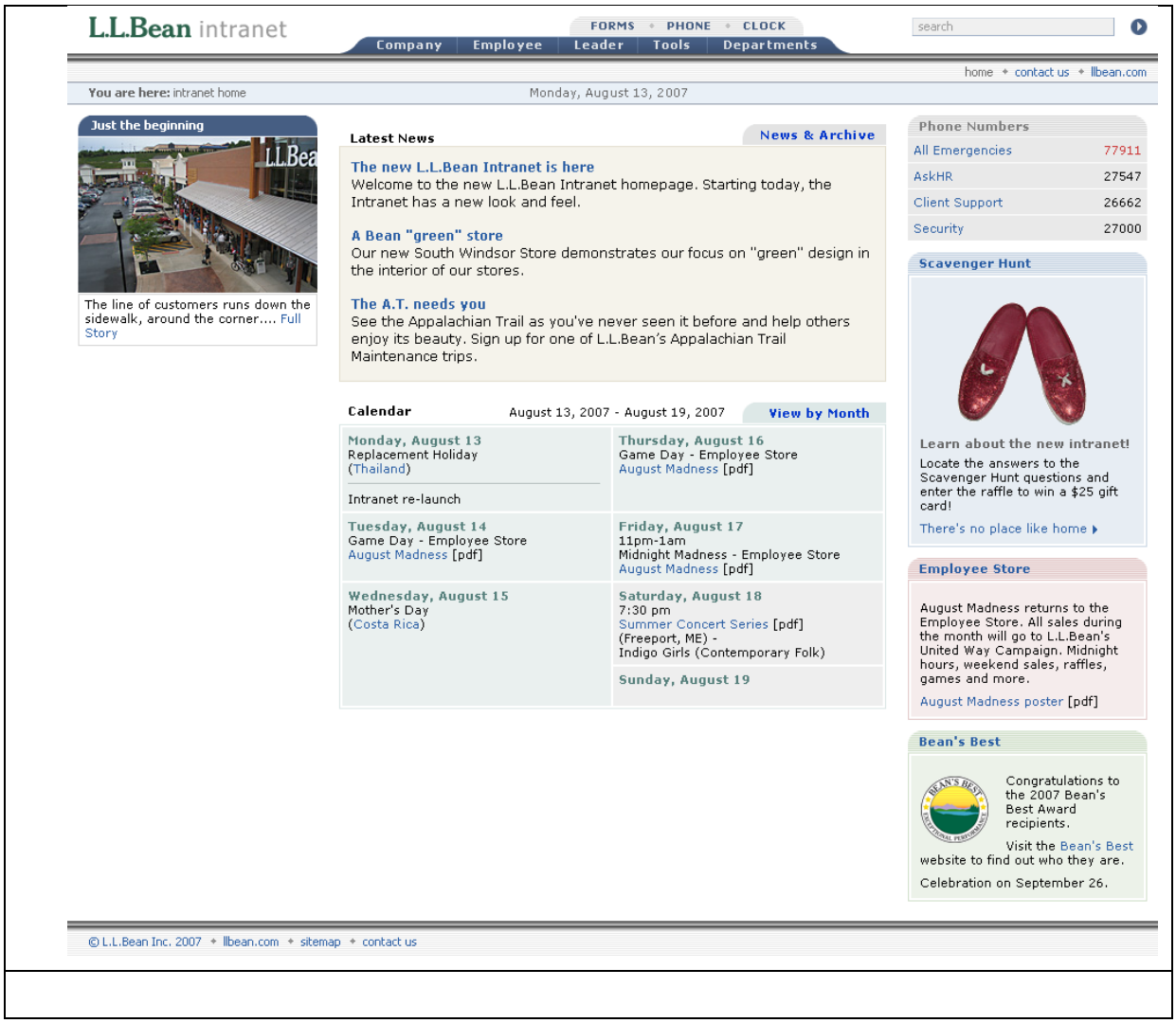
Pictured: An L.L.Bean intranet designer conducts a test of the HTML wireframe in the small back room of a retail store.

Launching with a Scavenger Hunt

When the team went live with the new site, they included an online scavenger hunt for the first month. “The communication motto was, ‘There’s no place like home,’” says Fitch. The scavenger hunt posed questions to users about topics that were scattered throughout the new IA. To be successful, users had to find the correct location of the question’s answer. A blue box containing a pair of ruby slippers would indicate that they’d found the answer and would pose the next question. At the end of the scavenger hunt, participants were entered into a $25 gift card drawing. “This helped expose employees to the new content organization in a playful way,” says Fitch.

Feedback was also collected via the scavenger hunt completion form. User feedback was very supportive of the new site. Over 600 employees participated in the scavenger hunt and 247 submitted feedback.

SCAVENGER HUNT TESTIMONIALS USER FEEDBACK FROM THE SCAVENGER HUNT INCLUDED THE FOLLOWING COMMENTS:
"This was a very nice learning experience." (Retail Store, Albany NY)
"Thank you—this was actually helpful. It seems to be a bit more user friendly than previous upgrades. :)!!" (Retail Store, Freeport ME)
"The 'improved' intranet is very easy to use...thank you!!!" (Outlet Store, Williamsburg VA)
"That was really fun and interesting. I learned a little along the way! I hope I win! I like the new set up!" (Call Center, Portland ME)
"Great exercise!! Encouraged me to get more familiar with the website (*wonderful redesign btw*)*."* (Call Center, Bangor ME)
"What a wonderful tool! As a Quality Coach who is taking on a PC role this Peak, *I am glad to have taken the few moments necessary to familiarize myself with the new intranet in this fun way!"* (Call Center, Waterville ME)
"After the shock of seeing a new page I discovered how easy it was to move around and find things. Thanks." (Order Fulfillment Center, Freeport ME)
"That was an interesting Scavenger Hunt. Some things took a little hunting to find, *but it was fun. Thank you!"* (Peck Building, Lewiston, ME)
"Really very easy to locate info...great job." (LL Building – IT Department, Freeport ME)



Pictured: This is what the new intranet homepage looked like on launch day in August 2007. The team used the *Scavenger Hunt* (right column) to help users find information and learn about the site.

URL AND ACCESS

The L.L.Bean intranet is accessed at http://llweb.llbean.com/.

The intranet homepage is the default for most users, though some operational departments set their department site as the default. Access outside the firewall is available to users with remote access. Remote access users are given a SecurID card with a random digital password to gain access to the intranet.

Operational areas and retail employees have access to public computers. These kiosks are available to employees who don't have an office station and work on the floor, including employees in manufacturing, packing, returns, and retailing positions. The quality of kiosks is not consistent from area to area. Most of the kiosks don't have printing capabilities.

10 Best Intranets: L.L.Bean



Pictured: A public access computer for employees who don't have a dedicated workstation. Kiosk station quality is inconsistent in operational areas; this station, for example, sits near a conveyor belt and the old monitor's screen display is purple.



Pictured: The kiosk stations in this call center are an example of some of the better kiosk set-ups at the company, but they don't provide employees with any privacy.

TECHNOLOGY

The intranet uses Microsoft Internet Information Services (IIS) 6.0 running on Windows Server 2003. There is one authoring server and two production servers. L.L.Bean uses Active Directory for directory services, and Exchange/Outlook for messaging.

The intranet administrator does a lot of client-side scripting using JavaScript and there is advanced form validation and interactive interfaces using DHTML.

Server-side programming is done using ASP/VBScript, and flat-file database connections use ActiveX Data Objects (ADO). There is some use of client-side ADSI scripting to leverage Active Directory for personalized content. For example, one page lets home office users view a large Web video that is inaccessible to users in remote stores who access the intranet over a WAN with much lower bandwidth connections.

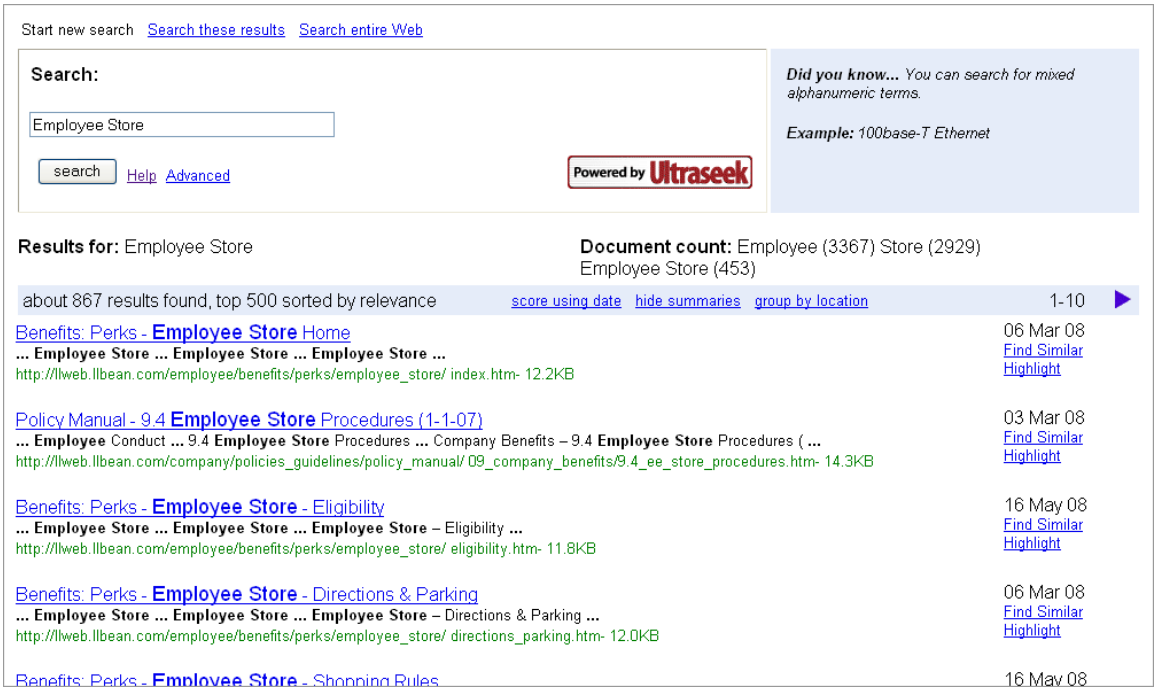
Dreamweaver is used as an editing tool; the site administrator also uses FrontPage to support some legacy department sites. Photoshop is used for design and prototyping, and Flash for developing motion graphics.

SEARCH

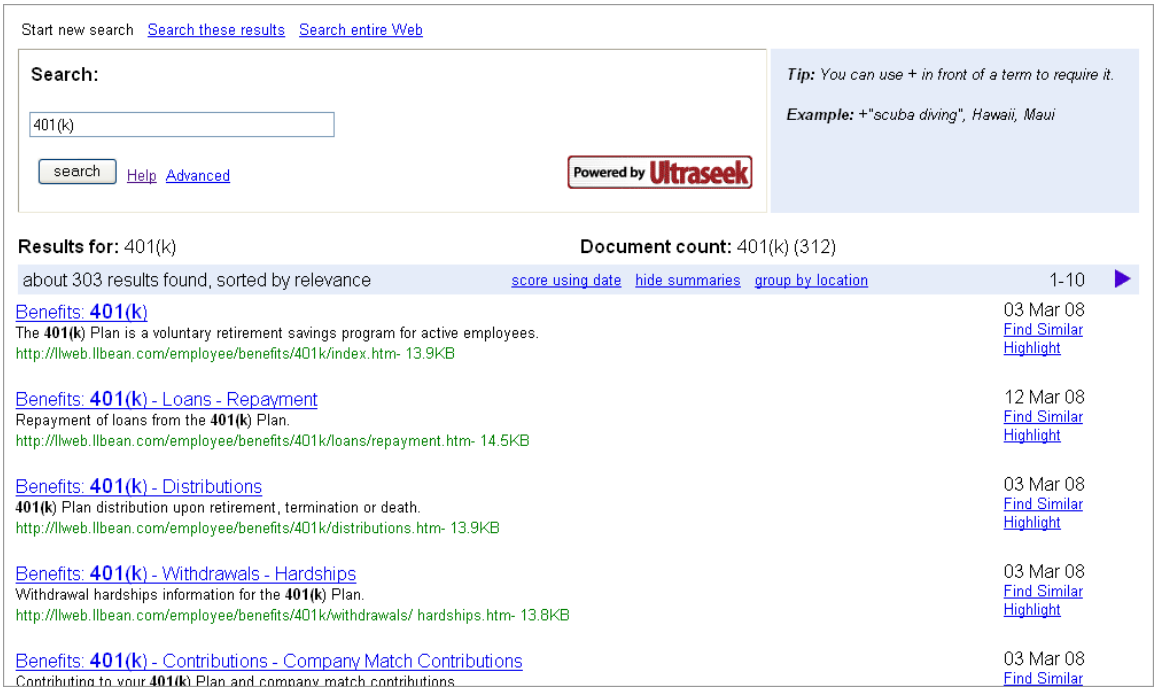
L.L.Bean's enterprise search is powered by Ultraseek 5.7.0 running on Windows Server 2003. The entire intranet (including the corporate content and department sites) has 18,700 pages and documents indexed. Several thousand more are password-protected pages that Ultraseek cannot index.

"We optimized the quality of our search results by enhancing metadata where needed and modifying Ultraseek administrative settings, such as indexer weights and spam detection thresholds," says Vincent. "We also altered the default look and feel of the search results to more closely resemble those of industry leaders Google and Yahoo."

Sample Search Results Screens



Pictured: Search results for "Employee store," which is one of the most popular search requests.



Pictured: Search results for "401(k)." Adding metadata with keywords, page titles, and descriptions has pushed the pages they want employees to find to the top of the search results.

FEATURES

Because the site's goal is to help users get information and get it fast, it makes sense that the site's "killer app" is an information tool—that is, the *Building Information* tool. "All the studies conducted with users indicate that people really loved this section of the site," says Fitch.

The tool lets users from different areas, cities, and buildings can quickly get information about a building or conference room they need to visit, either by searching or following an easy-to-use interface. The information is stored in a single flat-file that contains directions, phone number, room features (TV, VCR-DVD, network enabled, and so on), and room capacity, as well as information on specific rooms, such as the fitness room's hours and description.

Because the site doesn't use a relational database, it presents information dynamically using backend flat-file databases. "The use of a backend data source makes the content easy to update and maintain," says Vincent.

If the team had had to hard code this section, he says it would have required hundreds of hard-coded pages that would have been challenging to update. "Instead, the page for each building or room is dynamically generated from the flat file, which is easily updated in one place."

The same flat-file technique was used to provide easy-to-maintain lists of classes, such as those in *Leader Development* and *Wellness & Fitness*; books in the Lending Library; and past winners of the Bean's Best award. In these cases, descriptions are streamlined. Also, class lists include a sortable schedule that lets users view all current classes and sort them according to individual preferences.

10 Best Intranets: L.L.Bean



Class	City	Location	Days	Dates	Time	Cost
Beyond Toning	Brunswick	Brunswick Cafeteria	M/T/Th	hiatus	2:45 - 3:30 pm	$50
Beyond Toning	Freeport	Double L Fitness Room	M/W/F	6/16 - 8/20	7 - 7:45 am	$50
Fit in a Flash	Portland	Portland Pallet Facility	M/W/F	6/16 - 8/20	11:15 am - noon	$50
Fit in a Flash	Portland	Northport Fitness Room	M/W/F	6/16 - 8/20	12:15 - 1 pm	$50
FitPilates	Lewiston	Peck Fitness Room	T/W/Th	6/24 - 8/28	Noon - 1 pm	$60
FitPilates	Lewiston	Peck Fitness Room	T/Th/F	6/24 - 8/29	7 - 8 am	$60
FitPilates	Freeport	Returns Fitness Room	M/W/F	6/23 - 8/29	2:30 - 3:30 pm	$60
Fitness Fusion	Lewiston	Peck, Great Falls Room	T/Th	hiatus	4 - 5 pm	$60
Mid-Summer Triathlon, Duathlon or Aqua-Bike Training Program	Freeport	Double L, Royal Coachman	M	hiatus	Noon - 1 pm	$75 or $50
Middle Eastern Dance	Freeport	CCC, Freeport	W	hiatus	3:30 - 4:30 pm	$30
Pilates	Freeport	OFC	T/Th	ongoing	11:30 am - 12:15 pm	Free
Pilates	Freeport	CCC, Freeport	T/Th	7/8 - 9/11	11:15 am - noon	$50
Pilates on the Ball	Freeport	CCC, Freeport	M/W/F	7/7 - 9/12	11:30 am - 12:15 pm	$75
Pilates on the Ball	Freeport	OFC	M/W/F	ongoing	12:30 - 1:15 pm	Free
Retiree Exercise Class	Freeport	Freeport Fitness Room	M/W/F	ongoing	9 -10 am	Free
Smoking Cessation	Freeport		T	Call Karen Knapton	11 - 11:45 am	Free
Ten Weeks to Fiscal Fitness!	Freeport	OFC, Summit Room	Th	Call Jamie Anderson	11:30 am - 12:30 pm	Free
Weight Watchers	Portland	Product Training Room	W	5/21 - 7/23	Noon - 1 pm	$145
Weight Watchers	Freeport	OFC	Th	5/6 - 7/22	11:30 am - noon	$145
Weight Watchers	Freeport	Main St. Break Rm., Retail	Th	4/17 - 7/3	3:15 - 4:15 pm	$145
Weight Watchers	Freeport	CSOC, Caribbean Basin	T	6/24 - 9/9	Noon - 1 pm	$145
Weight Watchers	Brunswick	Brunswick TBD	M	hiatus	11:30 am - 12:15 pm	$145
Weight Watchers	Freeport	Returns TBD	W	hiatus	Noon - 1 pm	$145
Weight Watchers	Freeport	Surace, Oxford South	T	4/23 - 7/2	Noon - 1 pm	$145
Weight Watchers	Lewiston	Peck, Great Falls Room	Th	5/13 - 7/29	11 am - noon	$145
Weight Watchers	Lewiston	Peck 2nd shift TBD	W	hiatus	6 - 7 pm	$145
Weight Watchers	Portland	Northport 2nd shift TBD	T	hiatus	7 pm	$145
Workout Medley	Freeport	Taylor Fitness Room	T/Th/F	6/17 - 8/22	7 - 7:45 am	$90
Workout Medley	Freeport	Surace Fitnes Room	T/Th	6/17 - 8/21	8 - 8:45 am	$60
Workout Medley	Freeport	Taylor Fitness Room	M/W	hiatus	5:15 - 6 pm	$60
Workout Medley	Freeport	Taylor Fitness Room	M/W/F	6/16 - 8/22	4:30 - 5:15 pm	$90
Workout Medley	Portland	Northport Fitness Room	T/Th	6/17 - 8/21	4:15 - 5 pm	$60
Yoga	Freeport	Beanery, Freeport	Th	6/20 - 8/28	5:15 - 6:45 pm	$50
Yoga	Freeport	Surace, Ladyslipper	T	6/24 - 8/26	Noon - 1 pm	$50
Yoga	Freeport	Surace, Ladyslipper	Th	6/26 - 8/28	4 - 5 pm	$50
Yoga	Northport	Northport, Pine Room	W	hiatus	4:30 - 5:30 pm	$60
Yoga	Freeport	Double L, Royal Coachman	F	6/20 - 8/29 (no class 7/4)	Noon - 1 pm	$50

Pictured: The Wellness & Fitness class schedule is powered with the same flat-file technique used to provide easy-to-maintain lists of Leader Development classes, books in the Lending Library, and past winners of the Bean's Best award. In these instances, descriptions are streamlined and a sortable class schedule lets users view all current classes and sort them according to individual preferences.

LESSONS LEARNED

The design team learned many lessons during the redesign project.

Linda Carew, project manager:

Set yourself up for success. "Spend the time upfront needed to define the project and the roles of key players, create a vision, set objectives, assess and reduce risks, and get commitment for the resources needed. Create a project plan with the key people who will do the work."

Invest in your SMEs. "Train them in how to write for the Web. Educate them on how users think, and what's important to them. It's the gift that keeps on giving, because they'll use what they learn in future projects."

Manage change. "It is a complex project, with all of its levels of impact, moving parts, and people who will need to have input all over the company. Having project resources with expertise in managing change helped immensely. And a Web design process that focuses on the end-user makes the implementation of the change much easier."

Celebrate along the way. "The project took us a bit more than a year. I think it's important to celebrate along the way—at milestones, or sometimes just for small successes. And plan something special at the end to recognize all the effort that went into it."

Involve the project sponsors. "The involvement and buy-in of sponsors is a critical success factor for this kind of project. They need to understand what success looks like and be comfortable with the approach you take. They make the project a priority for the resources involved. Keep them informed, and find ways to generate excitement at each phase of the project."

Laurie Gonyea, intranet designer:

Trust that you will get good data. "There may be phases that you are not excited about doing, but in the end you get really good information."

Find—and appreciate—support for your project. "I was really pleased to feel the support behind this project. This was the first time we were actually given the opportunity to do each phase—minus the full design phase—but to actually have sufficient time to do paper prototyping, card sorting, and all these different rounds of testing. People stepped up to the plate and took time away from their jobs to come to us, or we went to them. I just really felt supported."

Account for data entry time. "When we scheduled the paper prototype testing, the data entry was not properly taken into account by all members of the team. You need to build that time into your timeline."

John Vincent, intranet administrator:

Designate a project room. "Having a dedicated project room where we could have the card sorting and categorization data up on the walls was very important. It enabled our sponsors to see the scope of the content and helped them to understand the value of the time we were spending. The space became a visual representation of all of the work we were doing."

Designate a project manager. "A comprehensive intranet redesign project absolutely requires a dedicated project manager. There is so much project management work to be done—from working with sponsors, to scheduling user

testing, along with producing PM deliverables like a project charter and status updates."

Melissa Coleman, intranet designer:

Organize information based on user choices. "When categorization is based on user choices rather than departmental or political hierarchy, the resulting site is much easier for everyone to use. Sometimes, the way the site is organized changes the way the company is organized, resulting in better productivity all around."

Design before code. When working in a hard-coding environment with a static left and right nav, it's very important to get the categorization and content completely done before starting to code. If the content is final, the coding will be quick and easy. If the content is not final, there will be a lot of time-consuming changes to the code."

Leah Fitch, lead intranet designer:

Results from actual users provide the most powerful leverage. "We really profitted from getting the top help desk issues, making tasks out of those, going to the users' place of work and watching them try to accomplish those tasks—timing them and counting the number of clicks. Then using the results of those field study tests as leverage to convince sponsors and upper management of the value of following a full-fledged Web process. Being able to show a visual presentation (PowerPoint) to sponsors with pictures of the employees performing tasks and their testimonials as they struggled with them was very powerful."

Test, test, and test some more. As Fitch notes, perhaps the most important lesson learned comes from the team's motto: "If you are going to have a user-focused site, you need to do user testing throughout the project!"

RESULTS / ROI

Post Mortem User Testing

In February 2008, to verify if goals were achieved, the team repeated the testing tasks with users on the new intranet. The same questions were asked of the users as in the original test sessions. The results of this re-test are shown in the charts below and include:

- 52% improvement in speed
- 28% improvement in the number of clicks
- 21% improvement in success rate

INITIAL USER TEST SESSION RESULTS			
Task	**Action Average**	**Average Time**	**Success Rate**
Find the company match for your 401(k) contributions.	10.69	2:33	69%
You've moved to a different town. Find the form to change your address.	11.85	2:47	77%
You will be applying for a bank loan and the bank will need to verify your employment with L.L.Bean. Find out what to do on the intranet.	10.08	2:38	54%
A family member has passed away. Find out who qualifies as immediate members of the family.	12.23	3:04	54%
You heard that L.L.Bean offers Yoga classes. Find the class schedule.	7.15	1:18	92%
You're adopting a child, which will require extended time away from work. Find out how many weeks away you are able to request.	8.38	2:30	85%
You have an idea to improve one of our products. Use the intranet to send this idea to the right people.	17.23	3:22	0%
A close co-worker is struggling with a recent setback (personal or work related). Find resources to help him/her.	3.92	0:34	100%
You need to send a signed document to Jamie Anderson via interoffice mail. What is her building code?	3.46	0:37	85%
Find the directions to log in to the *Employment* site.	5.38	0:57	77%
You work in Freeport and must go to a meeting in the Northport building in Portland. Find the driving directions.	8.08	0:55	92%
You must go to a meeting in the Androscoggin Rm in the Taylor building in Freeport. Find the directions to the meeting room.	8.08	0:51	62%
You went to a meeting in the Northport building in Portland from your office in Freeport. You now want to be reimbursed for the mileage. Find out the total approved mileage.	7.00	2:12	54%
Find information on how to set your goals.	7.92	1:19	62%
Use the intranet to find out how you can anonymously report suspicious activities.	10.15	2:16	38%
Cumulative Average Totals	**8.87**	**1:52**	**67%**
	Action Average	**Time Average**	**Success Rate**

Pictured: Initial user testing task results from tests conducted at the beginning of the design process.

POST MORTEM USER TEST SESSION RESULTS			
Task	**Action Average**	**Average Time**	**Success Rate**
Find the company match for your 401(k) contributions.	4.00	0:30	83%
You've moved to a different town. Find the form to change your address.	8.67	1:48	67%
You will be applying for a bank loan and the bank will need to verify your employment with L.L.Bean. Find out what to do on the intranet.	5.17	1:20	83%
A family member has passed away. Find out who qualifies as immediate members of the family.	5.33	0:38	100%
You heard that L.L.Bean offers Yoga classes. Find the class schedule.	7.17	0:43	100%
You're adopting a child, which will require extended time away from work. Find out how many weeks away you are able to request.	6.67	1:23	67%
You have an idea to improve one of our products. Use the intranet to send this idea to the right people.	10.17	1:06	83%
A close co-worker is struggling with a recent setback (personal or work related). Find resources to help him/her.	4.00	0:40	100%
You need to send a signed document to Jamie Anderson via interoffice mail. What is her building code?	4.00	0:32	100%
Find the directions to log in to the *Employment* site.	5.83	0:49	100%
You work in Freeport and must go to a meeting in the Northport building in Portland. Find the driving directions.	6.33	0:36	83%
You must go to a meeting in the Androscoggin Room in the Taylor building in Freeport. Find the directions to the meeting room.	7.50	0:43	100%
You went to a meeting in the Northport building in Portland from your office in Freeport. You now want to be reimbursed for the mileage. Find out the total approved mileage.	7.50	1:19	83%
Find information on how to set your goals.	4.50	0:29	100%
Use the intranet to find out how you can anonymously report suspicious activities.	4.50	0:39	100%
Find the list of paid holidays.	9.83	1:08	100%

Some area merchants extend special offers to L.L.Bean employees. Find the list of current offers.	6.33	0:48	100%
Find out how to get movie tickets at a reduced price.	9.50	1:07	83%
Find out when the Employee Store is open.	6.67	0:50	83%
Find guidelines on keeping L.L.Bean system information safe.	5.50	0:54	50%
Find opportunities where you can help out at company-sponsored events.	5.83	0:48	83%
If you were new to L.L.Bean, where would you go to learn how to navigate our intranet site?			
Cumulative Average Totals	**6.40**	**0:54**	**88%**
	Action Average	**Time Average**	**Success Rate**
Average Max	10.17	1:48	
Average Min	4.00	0:29	
Comparison to Original 2007 Round	28%	52%	21%
2007 figures	8.87	1:52	67%

Pictured: Post mortem user test sessions were conducted approximately six months after the launch. As shown here, the team saw significant improvements.

Overall, Fitch says, “The intuitive reorganization of the information makes it much easier for employees to find information and answer questions themselves, rather than having to ask a manager or call AskHR.

“A 52% improvement in the speed of finding information means more productive employees,” she says.

The redesign gave users many more navigational options, and they can search with greater success because of the addition of keyword and description metadata.

User Comments

Though metrics help make a business case for a redesign effort, often the most compelling results come from user feedback and anecdotes from users about how the site helps them do their jobs better. After the launch of the new site, the intranet team received comments from across the organization. Here are a few examples:

10 Best Intranets: L.L.Bean

USER FEEDBACK ON THE SITE AFTER THE REDESIGN
"I went looking for information on the new company travel site, thinking that it would be out of date. Well, I stand corrected… Nice job, found what I needed quickly and easily. Just in case no one ever said good job! GOOD JOB!" (IT user)
"Everyone loves your clean, crisp design and layout." (IT user)
"Looks great! It's better organized and will probably be easier to use." (Returns user)
"I think the new design looks GREAT! You've done a fantastic job making the intranet more user-friendly and intuitive, and it looks consistent throughout all channels. I haven't had a chance to go through all of the sections, but so far I really like what I see." (Retail user)
"Just wanted to let you know the new website is excellent. Very contemporary and easy to find information. Great job!" (Facilities user)
"The new site looks great, and is very well organized!" (Merchandising user)
"I just used the meeting room search tool. WOW! I thought I was going to have to go through all the buildings in southern Maine to figure out where my meeting is the morning. I saved so much time I wanted to use it sharing some major Kudos with the intranet team. Thanks for making my morning so much more efficient!" (HR user)

McKesson Corporation

Using the intranet

As the nation's largest health care services company, McKesson provides pharmaceuticals, medical supplies, and health care information technologies. It is the largest pharmaceutical distributor in North America, distributing one-third of the medicines used in North America and supplying more than 40,000 U.S. health care locations. McKesson is also the nation's leading health care IT company, with software and hardware technology installed in more than 70% of the nation's hospitals that have more than 200 beds. McKesson has 32,000 employees worldwide.

Headquarters: San Francisco, California

Number of employees the intranet supports: Targeted toward 50,000 employees and contractors, the McKesson intranet (McKNet) is used by office workers, technologists, sales people, customer service, distribution, and most business functions throughout 30 business units in the US, Europe, and Canada.

Annual sales: $101.7 Billion (year ended March 31, 2008)

Design team

A core in-house project management and technology team of 15 people managed the launch and implementation of the McKesson Enterprise *Employee Portal*, the first of three releases on the company's Intranet Strategy Roadmap. Stakeholders from over 30 business units and corporate functional departments informed the design. Supplemental strategy, IA, and visual design services were provided by Logical Design Solutions (LDS). Analytics and online metrics services were provided by Peridot LLC.

Members

In house: Tracy Thomsic, director of online marketing; Vaughan Acton, senior director of corporate branding; David Seghers, Internet project manager; Drew Vecchione, Web production specialist; Jacob Covington, Web producer; Elana Keil, content strategist; Julie Person, program manager HR; Mary Jo Borges, McKesson provider technologies (MPT) customer operations sales; Esteban Borrero, VP solutions delivery, corporate IT (CIT); Anand Srinivasan, development manager; Glenn Conrad, support manager; Vijay Desai, director of IT; Stasia Lord, brand manager; Nicole Lee, manager of employee communications; Lisa LaVallee, IT managed services; Kate Rohrbach, (retired) VP corporate communications; Mark Fordyce, manager of applications development, CIT; David Cain, new media project manager, CIT; Jennifer Galloway, Web content strategist, MPT; Terrell Yelverton, Web content strategist, MPT; Erik Sprotte, VP of HR; Charles Fusco, HRIS development manager, CIT; Dennis Brice, director of HRIS, CIT; Susan Slater, VP talent acquisition, HR; Carol Wong, communications coordinator; Pat Moreira, director, employee communications; Nerissa Moore, multimedia specialist; Shyam Dasari, senior software engineer; Eric Deatrick, HRIS analyst; Todd Johnson, quality assurance manager.

Logical Design Solutions:

Dave Stoltzfus, chief operating officer; Susan Willett, senior communications consultant; Millicent Cooley, user experience specialist; Mark Benzkofer, creative consultant; George Armstrong, designer; Oliver Hickman, project manager.

Peridot LLC: Cynthia Kongorski, data analyst.

SUMMARY

An intranet that includes thorough information for 50,000 employees and contractors can get unwieldy pretty fast. And, in the case of the McKesson intranet, this fact was complicated by the potential unruliness of a varied user base. The McKesson Corporation's intranet, McKNet, serves a variety of employee types, including office workers, technologists, sales people, customer service, distribution, and most business functions.

To protect people from the clutter of information they don't need, and to ensure they get the information they do need, designers of this intranet made excellent use of personalization features. A well-planned and updated personalization model makes it easy for all employees at McKesson to find the information that is right for them.

The McKNet homepage provides personalized work-related content and tools, and news and content personalized by business unit/location. Upon logging into McKNet, employees are offered several timesaving, communication-related advantages, including:

- Single sign-on (SSO) to 33 internal applications
- Customized companywide alerts
- Business unit-specific branding and promotions
- Additional personalized content

The byproduct of these advantages is that people get the tools and information that are most important to them. They also protect people from having to deal with information and tools they don't need, which can create additional clutter and possibly overwhelming choices.

In the homepage example below, a user from the McKesson Provider Technologies (MPT) business unit is logged in. One visual indication of this is the text that appears below the McKNet logo in the upper left: *McKesson Provider Technologies.* The user's name appears below this, welcoming him, confirming who is logged in, and offering a link for *Sign Out.*

The main internal news, *Today at McKesson*, *Company News,* appears in the upper-left column. Here, users can read the top news headlines and see the date they were posted. The title links lead to the full stories. Note that each story's date is posted with the title, which helps people ensure that the news is current before they bother clicking it. Also, the month is written in an international format using alpha characters, not numbers, to represent months. For example, July fourth is written as *Jul 04*, instead of what is commonly seen in the US as *07/04* or in Europe as *04/07.* Designers chose to represent dates this way because they know that McKNet is used by office workers, technologists, sales people, customer service, distribution, and most business functions throughout 30 business units in the US, Europe, and Central America. Details like this help to ensure that all employees understand the information. Also, this kind of design helps everyone feel included and respected.

Depending on the user's background, specialized news sections might also appear on the homepage. The example below shows an additional news section for *MPT News*, appearing just below the *Company News* section. These news items are presented in the same format as the company news items, preventing users from having to learn or recall different interfaces.

In another personalized touch, the bottom section of the homepage's left-most column displays the *Inside MPT* section.

To summarize the content area, the three-column format provides news and content personalized by business unit/location on the left side and personalized work-related content and tools in the center. It also supports targeted promotions and sidebars in the right-most column.

10 Best Intranets: McKesson Corporation



Pictured: The Homepage of McKesson Corporation's intranet offers personalized content and links for the logged-in user.

The homepage also offers a *Guest View.* This version is presented to consultants and employees who have not yet signed in. There is still a great amount of information for them to access, but it is missing some of the personalized aspects. Among the elements that are visibly missing in this version are the:

- Branded logo in the upper left of the page
- User name and welcome message in the upper left
- Unit-specific news section beneath the main *Today at* McKesson section in the left-hand column
- Unit-specific information section, *Inside MPT*, at the bottom of the left-hand column



Pictured: The homepage's *Guest View* offers thorough information for guests, including consultants, but doesn't display personalized sections.

Looking beyond the content area and up to the top of the page, people can very easily search for employees or search the intranet. The way the designers have presented this search front-end is very usable. Some designers argue that two open fields take up more space than either a drop-down search scope or radio buttons. And they are right. Some say two fields are unsightly, but beauty is in the eye of the

user. Usability studies show that users more easily find employees search and intranet search when there are two open, well-labeled fields adjacent to each other.

And many intranets like McKNet offer *Express Links* or quick links, which lead to commonly accessed site areas. The user's eye, when looking for search, often goes to any area that looks like a type-in field. While there is text in the *Express Links* area, if not placed near and after the search, the eye might not be drawn to it. But McKNet designers made an astute choice in parking all of these elements near each other, and at the top of the page. This is a very usable intranet search front-end.



Pictured: The employee search and global intranet search functions appear as separate open fields adjacent to each other. This makes them easier to find and decipher, which is also true of the *Express Links* drop-down, which somewhat resembles a type-in field.

The *My* Site feature lets users create their own intranet areas with professional and personal information. Individual profiles offer so much more than the usual flat basics. On McKesson's intranet, people can write about their background as they see fit. More rigorously, they are asked to answer questions about *responsibilities*, *skills*, and *past projects.* This way, other employees can easily find the person with the skills they need. Users can also provide more personal information, such as the schools they attended and their interests.

A mini org chart shows the organization's hierarchy, and the name of the profiled person's assistant is also listed with the contact information.

The right-most column shows any memberships that the user and profiled person share. Below this are the user's own memberships and accessible sites. Users can post documents, photos, and more using the menu on the left-hand side of the page.

A blog at the bottom of the page lets users express their opinions. The option to add blogs, wikis, and RSS feeds on top of the portal helps make it a collective knowledge center.

10 Best Intranets: McKesson Corporation



Pictured: An individual's profile includes personal information, blog entries, and documents.

10 Best Intranets: McKesson Corporation

McKNet's information and pages are of course only as good as the navigation that gets users to them. This intranet's ever-present global navigation is straightforward and presented as understandable, selectable tabs. These tabs lead to tools, information, and personalized sections of McKNet. Once a tab is clicked, the selected area is highlighted and the left-side context menu for that section appears.

The top-level category tabs include: *Inside McKesson*, *My Work*, *Today@McKesson*, *Services Center*, and *My Life & Career.*

The *Inside McKesson* area gives a great deal of information about the organization, and in doing so supports a unified company culture. The *Inside McKesson* information includes a corporate overview, history, policies, the org chart, brand information, the executive team, strategy, and links to information about specific business units.

The writing on the pages is thoughtful and thorough. And, the editors endeavored to create text in sections instead of in off-putting walls. For example, the page depicted below shows sections and headlines within the text. Phrases such as *Customer Challenges*, *McKesson's Role*, and *What's Next* help users to find the section they want more easily. Subheads and bullets also help people readily read and retain important messages. And, instead of leaving employees to fend for themselves for more information, the *Learn More* section to the right of articles offers links to related content.

10 Best Intranets: McKesson Corporation



Pictured: A sample content page shows headlines, chunks of text, call-outs, related graphics, video, demos, and *Learn More* links, engaging readers on many levels.

10 Best Intranets: McKesson Corporation

The tab to the right of *Inside McKesson* is *My Work*. This section is specifically related to the user's job and provides tools and resources to support the employee. This section helps eliminate the many e-mails that teams previously sent around and that inevitably seemed to get lost or misfiled. Having these personalized tools and information helps all employees, from the sales person to the HR representative. For example, a sales manager is presented with sales reports, commission statistics, forecasts, team opportunities, and marketing materials. Updates are available in one place, ensuring that employees access the most accurate and up-to-date resources.

The main navigation in this section links to *My Success*, *Product Central*, *Events*, *Sales Education*, *Marketing*, *Message Center*, *Forms and References*, *Sales Process*, *Sales Support*, and *My Reports.*

10 Best Intranets: McKesson Corporation



Pictured: An example page for a sales manager in the central region. Notice the sales messages based on location and HR tasks, such as *HR for My Team* in the upper right, related to managing a team.

10 Best Intranets: McKesson Corporation

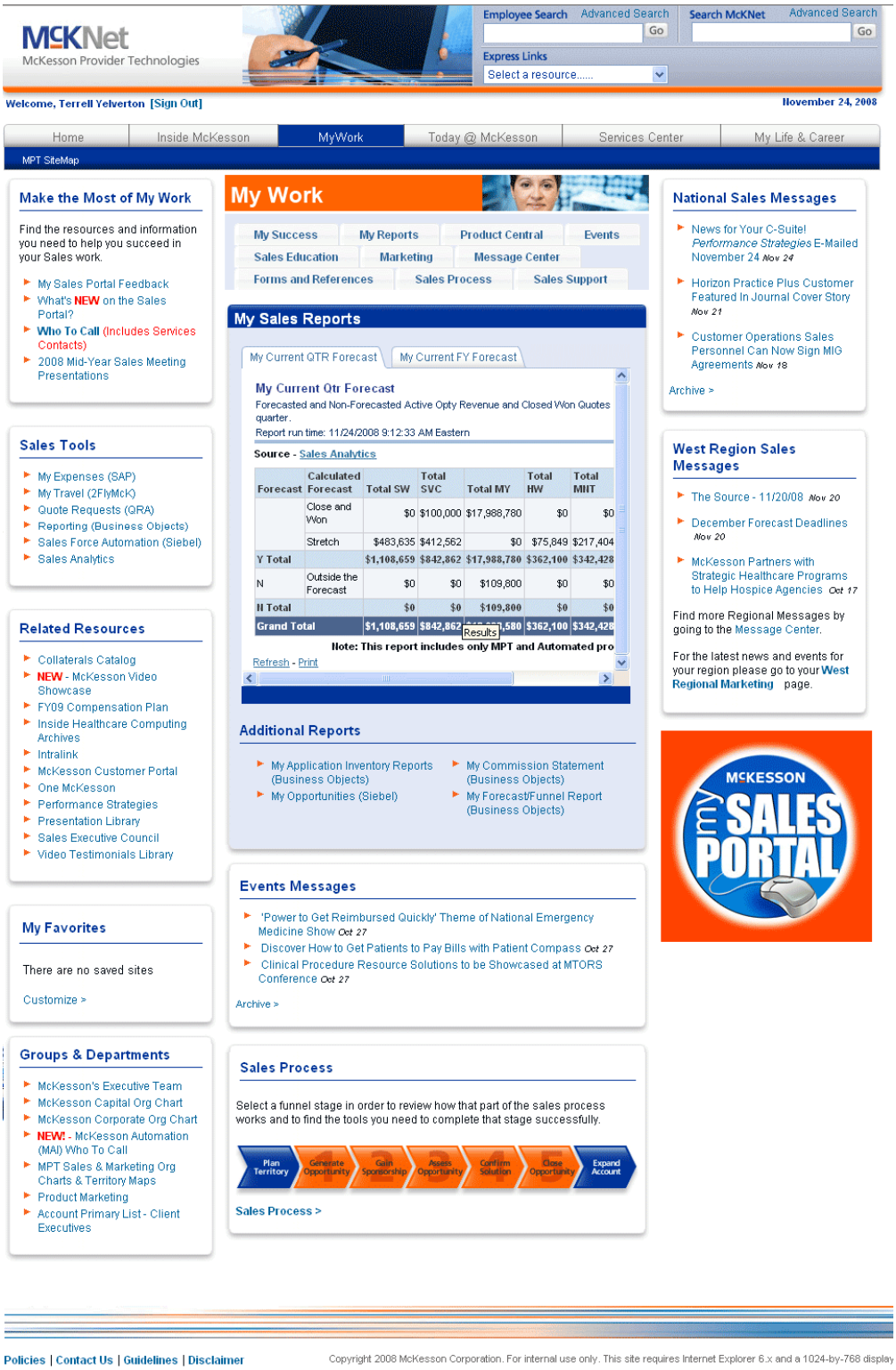
One of many topics that sales people might learn or be reminded of is how McKesson's sales process works. A link on the section's main page leads to a more descriptive page, with information depicted in text and graphics. Elements of the charts and graphics are clickable links that let users drill down to more information.

10 Best Intranets: McKesson Corporation

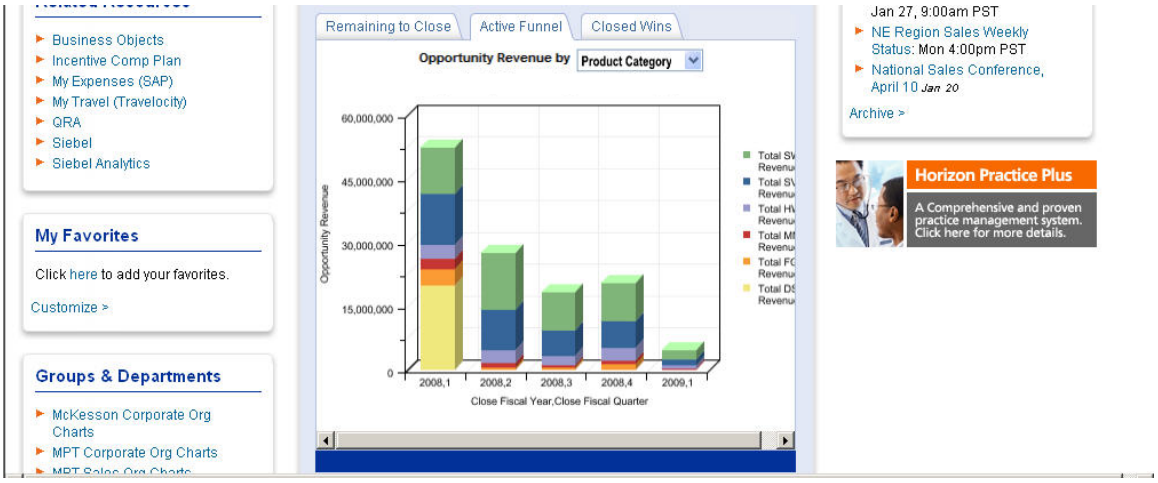


Pictured: This page helps the sales force understand and access the tools needed for each of the steps in the sales process. Each step is clickable, with tasks, information, and links to tools highlighted.

10 Best Intranets: McKesson Corporation



Pictured: An example of an application integrated directly into the portal interface. MPT sales personnel can view personalized sales reports—pulled dynamically from McKesson's CRM application—directly in the portal. Sales people can also access their e-mail in the portal to look up contacts and send e-mail.



Pictured: This view of application integration shows further functionality available to MPT sales personnel: the integrated portal application's reporting capabilities pull the active sales status from the CRM and display dynamic charts for the user.

Another example of the *My Work* section's role-based personalized is depicted below for a person in the Central IT group. In this case, the user selected the *Goals* section, and is presented with text and charts summarizing the group's goals and how far group members have progressed toward meeting them. Each objective is numbered and summarized, and the status is kept up-to-date.

10 Best Intranets: McKesson Corporation



Pictured: A customized page based for the Central IT functional group displays the group goals and charts measuring success.

10 Best Intranets: McKesson Corporation



Pictured: The HR function's *My Work* page features customized information and links to the tools and resources needed for these professionals to perform their jobs.

Clicking the *Events* menu on the left brings the employee to the calendar of sales-related events—yet another personalized function on the McKesson intranet. In the example below, an employee in the MPT business unit filters information in the personalized calendar based criteria including date, *Event Type*, *Sales Role*, and *Sales Region. Events Messages* and *Related Resources* actually help employees make arrangements to attend events.



Pictured: Users can filter their personalized calendars based on date, type of event, sales role, and region.

The fourth tab in McKNet's global navigation is *Today@McKesson*, which houses news, personalized to function and location, and corporate-wide topics. Users can do a keyword search of news or sort news items by date, drilling down from the year level.

This news center ensures that employees are knowledgeable about the overall business and feel connected to their specific business unit. They can also choose from the new categories listed in the left-side navigation, such as *Company News*, *MPT News*, *Around McKesson*, and *In the Know*.

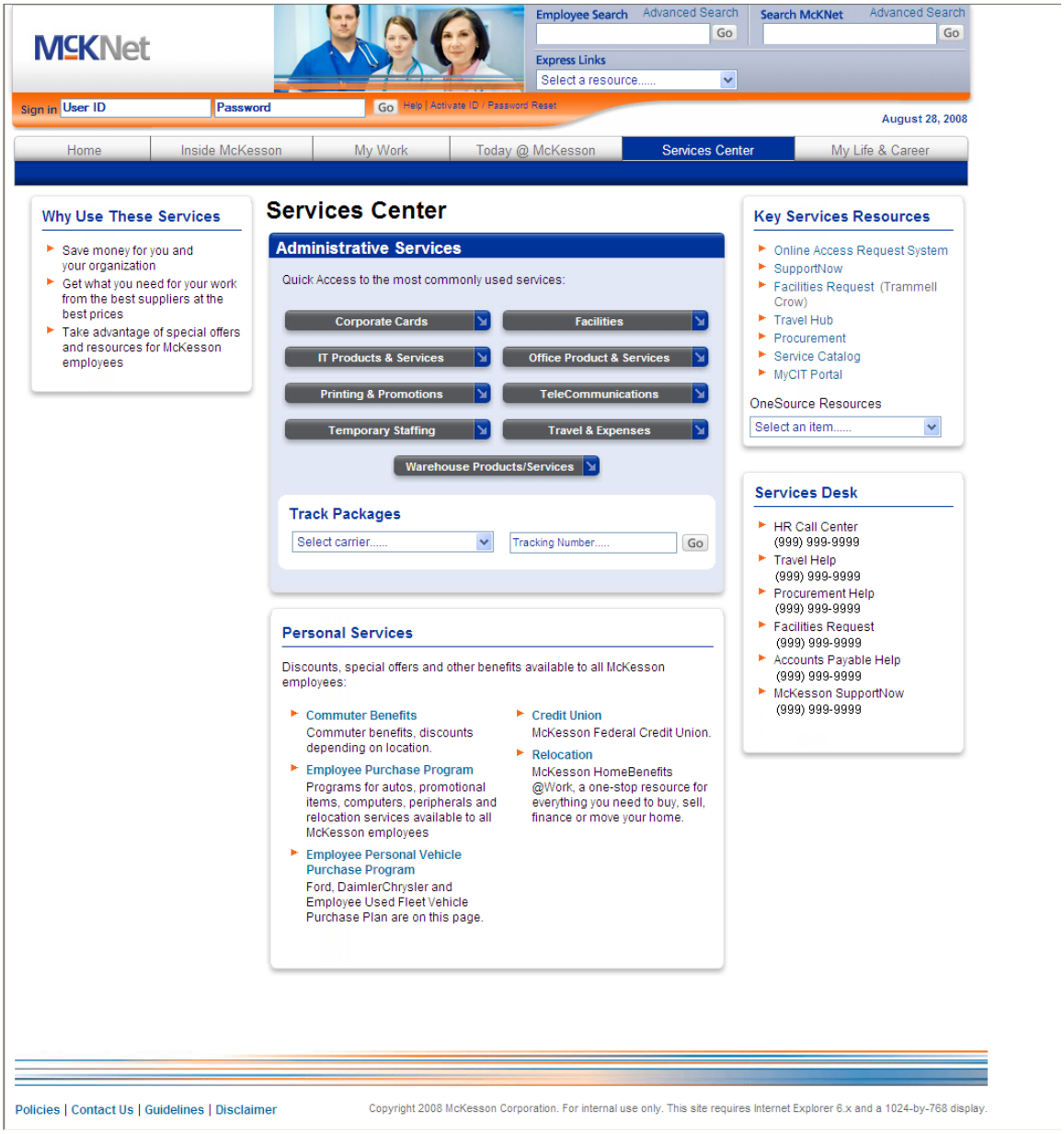
The news items themselves are to the point, giving users information quickly to maintain their interest. Supporting images, like the one below showing the McKesson employees ringing the opening bell on the NYSE, are fun for employees to see.



Pictured: *Corporate News* and news personalized by function can be found in the intranet's *Today*@McKesson section. Users can sort and search for news articles, which often include interesting images to support the text.

The fifth tab in the global navigation, *Services Center*, is the place to go for common employee service resources and applications. Users can make requests related to facilities, procurement, printing, IT, and travel, among other things. Necessary support contact phone numbers are readily available. The section also offers access to special deals, perks, and offerings for McKesson employees.

Like the other areas on McKNet, this area is also personalized—in this case, by location, which makes sense.

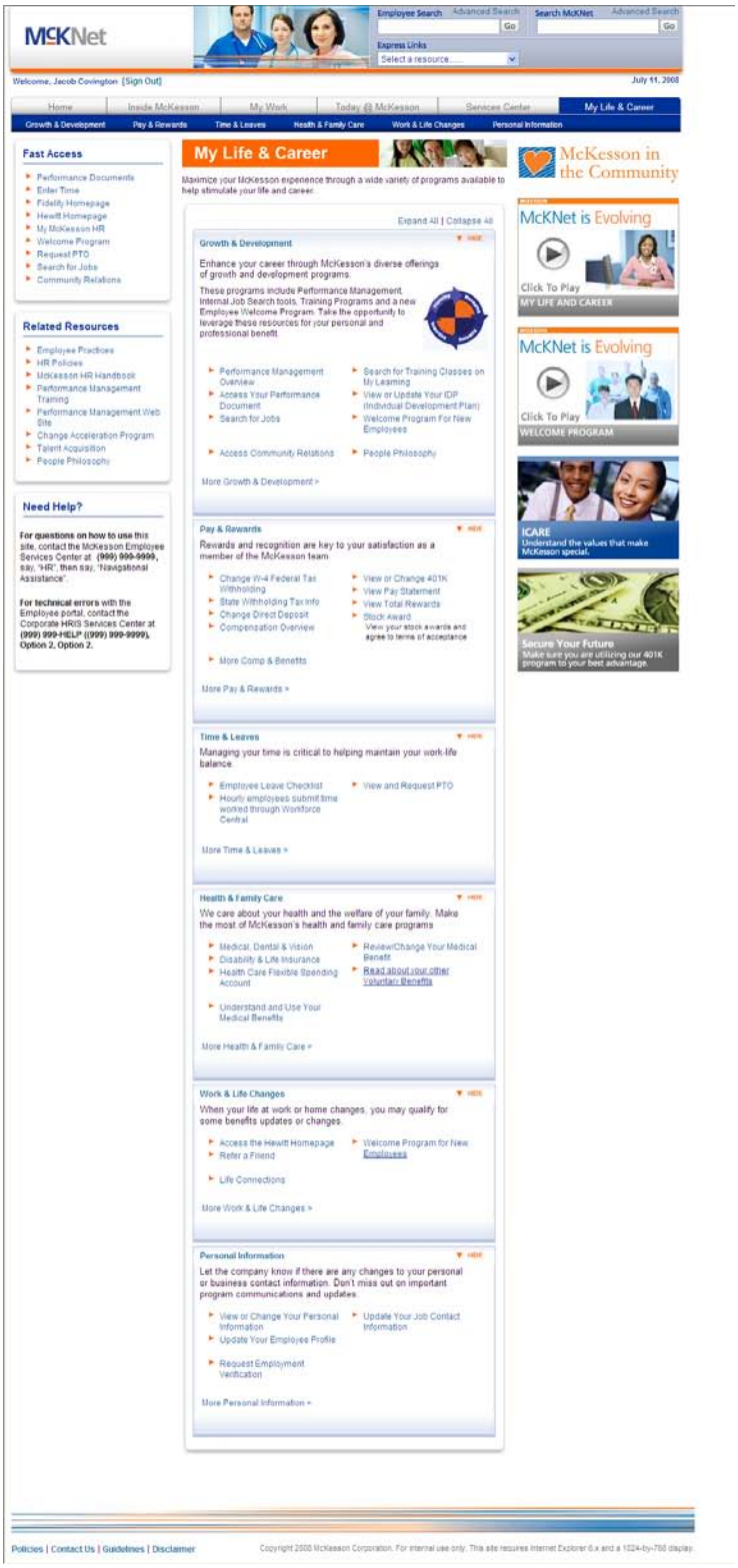


Pictured: The *Services Center* consolidates all common employee service resources and applications.

The sixth and final global navigation tab, *My Life & Career*, has an eye on management and HR functions. The main page for all employees consolidates all the essential functions employees need to manage their work and personal matters.

This page also makes good use of the expand/collapse functionality to enable employees to easily view and access all these functions in an organized and efficient way.

10 Best Intranets: McKesson Corporation



Pictured: The *My Life and Career* page consolidates all essential functions that employees need to manage their work and personal matters. This page also makes good use of the expand/collapse functionality to enable employees to easily view and access all of these functions in an organized and efficient way.

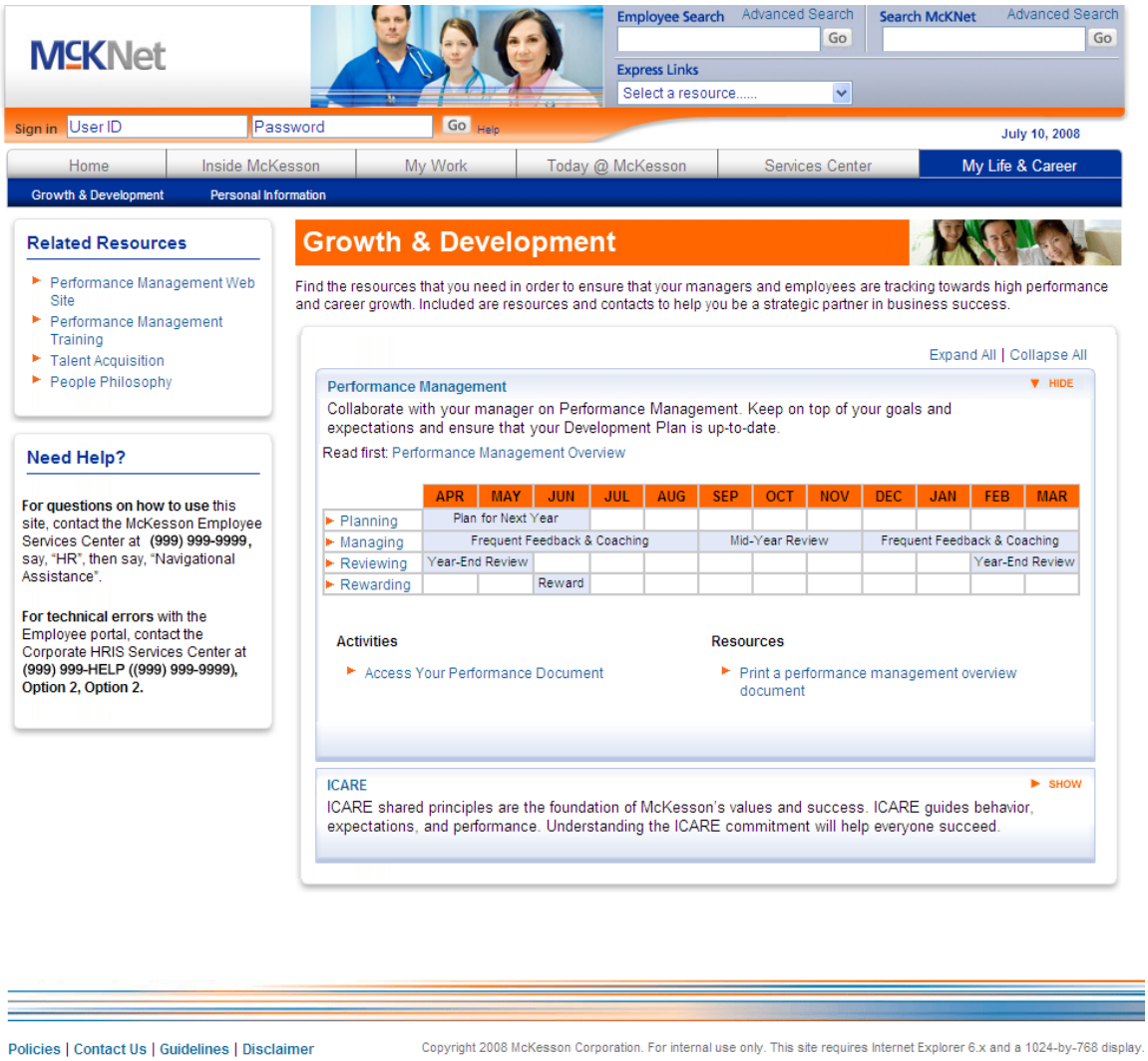
Like all of the other areas on McKnet, the *My Life & Career* area is individually personalized. Information presented here is based on the user's personal data and role, such as leader, manager, or employee.

Tools and information for performance management and hiring are a few of the HR-related areas consolidated in this central location.

One section specifically offers information and help for new employees so they can get started and feel comfortable and confident as quickly as possible.

Knowing that new processes can trip up any employee, another section is dedicated to explaining information related to all new processes. This area also helps guide employees through complex tasks.

An example page for HR professionals shows a process-flow of the performance management tool. Users can choose to *Show* and *Hide* page components (or expand/collapse all) to make the information on the page more manageable as they work through it.



Pictured: An example page for HR professionals shows a process-flow performance management tool. The *My Life & Career* area of the McKesson intranet is individually personalized, delivering information based on role (such as leader, manager, or employee) and personal data.

10 Best Intranets: McKesson Corporation

McKesson's intranet designers said that one of their goals was to "connect McKesson employees to essential resources that help them improve productivity." While no easy job, this was certainly done, about tenfold. Among other achievements, this intranet supports a truly inspiring amount of flawlessly implemented personalization features. In fact, it is so seamless that the intranet's users probably have no idea of the extent of work behind this personalization. Instead, each employee probably thinks that McKNet was created especially for him or her. And, in some ways, it was.

BACKGROUND

In the Beginning

In 2005, McKNet comprised over 100 different loosely connected internal websites and applications. A slide called the "many faces of McKNet" (shown below) features a collage of homepages for these sites. This slide became famous at the company for serving as an illustration of the confusing intranet environment and lack of visual identity that was McKNet in 2005.

These myriad sites existed on servers separate from the corporate intranet, and were displayed as links off of the McKNet homepage and secondary navigation pages. The user experience was further eroded by the cumbersome access the site provided to mission critical applications. The links offered access to more than 40 different applications, but each required a separate login. Those applications included PeopleSoft/Oracle HR, SAP (enterprise finance and supply chain systems), and business unit intranets. Content on these sites was maintained by business unit owners or corporate staff, with little or no coordination or established standards.



Pictured: "The Many Faces of McKNet" slide shows a collage of the homepages of the various sites that were loosely connected to form the original McKesson corporate intranet in 2005.

"The old intranet had a poor employee search experience where search results were inaccurate," says Tracy Thomsic, director of online marketing, adding that "results could include employees who had not worked for the company for several years."

There were no standards in place for visual design, content, navigation, or making improvements to McKNet. "Consequently, many employees found McKNet impossible to navigate, search results were inadequate, and the login experience and multiple passwords required for core functions resulted in untold hours of lost productivity and frustration," says Thomsic. "Another problem with the proliferation of many 'faces of McKNet' was the erosion of brand equity."

McKesson's Corporate Communications team and Corporate IT groups worked together to build a strategic plan to redesign McKNet and launch an enterprise employee portal. The initial team consisted of only four people—two in IT, and two in Corporate Communications—who were tasked with migrating the technology platform and building a business case for the redesign.

Starting Over

The business case to redesign the intranet and launch an enterprise-wide portal was based on six key findings:

- There had been no significant investment in McKNet since 1998.
- The site was difficult to navigate.
- There was a lack of standards.
- The site had no user/role authentication.
- It offered limited self-service.
- There were duplicated costs and processes across the organization.

These findings resulted from interviews with employees and executives from 35 groups across the company. These interviews further revealed that

- McKNet was the one tool at McKesson that spanned all organizations across the enterprise, and
- McKNet was dramatically under-utilized.

The solution the team proposed was to re-launch McKNet as an enterprise employee portal and integrate McKesson's many intranets into one platform over a three-year period. They determined that an interdisciplinary team, consisting of stakeholders from Corporate IT, Corporate Communications, and HR would govern the project. They also agreed on a strategic vision, mission, and objectives to gain support and funding for the project, and to guide its development.

Developing a Strategic Vision

According to Thomsic, "executives felt that if the employee portal's user experience improved, user adoption would increase. Also, if enterprise systems such as HR and finance were better integrated with McKNet, then the promise of self-service functionality could be realized."

Achieving that vision would require a solid plan that included achievable steps guided by a global strategy. To that end, the McKesson team developed a vision statement for the site: "to become a centralized, personalized entry point where all employees go to get work done and learn about McKesson." In achieving that vision, the site will:

- provide access to resources and enable collaboration to support specific job functions;

- help streamline administrative and managerial tasks that are not specific to job function; and
- be an integrated communications platform that helps McKesson promote a unified culture.

Supporting Business Objectives

The intranet's mission is to connect McKesson employees to essential resources that help them improve productivity, increase business literacy, and reduce costs by automating business processes, supporting mobility, and enhancing collaboration.

The following strategic business drivers inform this mission and will guide future releases as the site evolves.

- **A nimble and adaptive workforce.** McKesson requires a flexible and highly adaptive workforce to be a leader in healthcare evolution.
- **Top talent.** One of the most important company objectives is acquiring, developing, and retaining top talent.
- **Shared services.** Centralized corporate shared services help manage costs, drive efficiency, and improve consistency of services.
- **Unified culture.** Success depends on McKesson's ability to build a unified culture while preserving business unit autonomy. This will:
  - support engagement among employees, and
  - create alignment among the business units.
- **Business literacy.** Develop business literacy among the entire organizational community and thereby empower business units.

The company believed that the new intranet could help them score wins on these critical components. So, a new plan for governance was proposed that established an executive steering committee—with the chief information officer as executive sponsor—and an advisory council that included rotating members from McKesson's business units and corporate departments. Project benefits and risks of inaction were developed through consensus and subsequently communicated and socialized across the organization to obtain funding and project support. They are outlined as follows.

Project Benefits

- **Lower design costs** by implementing predictable cost model for portal development.
- **Reduce cycle times** for new project design and implementation.
- **Improve quality and predictability** of portal development projects.
- **Gain economies of scale** with established service levels and project key performance indicators (KPIs).
- **Leverage investments** in enabling technologies and workflow automation; standardize, re-engineer, and consolidate transactional work.
- **Increase adoption and heighten business literacy** through a unified, leading content strategy that keeps the portal relevant, consistent, and valuable.
- **Improve productivity and save time/costs** via user-centric design and functionality, rather than system- or organization-centric design.
- **Improve knowledge transfer and collaboration** across the enterprise.
- **Eliminate departmental silos** by reinforcing "One McKesson" initiative and culture.

Risks of Inaction

- **Inconsistent messaging** and **inaccurate content** across the organization.
- **Fractured, inconsistent intranet UX** that's **frustrating** to use and more **costly** to maintain.
- **Stunted intranet development** for lack of resources, slowing down projects.
- **Compromised quality** of intranet content and applications due to lack of UX and content expertise.
- **Poor utility** that decreases productivity and wastes employee time, **reducing ROI.**
- **Decreased credibility** that compromises perceived relevance and effectiveness of corporate HR, IT, and communications, encouraging business units and functional groups to pursue their own visions for intranet content and UX.
- **Increased cost** due to duplicated content development and publishing, piecemeal vendor management, and inconsistent UX.
- **Ineffective governance** leading to **development of redundant/conflicting applications, systems, and processes.**
- **Devolution** of the intranet into an increasingly disparate **hodgepodge of fractured sites** with no unifying UX or message.

The governance team also identified a number of critical success factors that would serve as tactical objectives for the new intranet.

Critical Success Factors

- Design and launch a user-centric, modular, and scalable portal
- Keep content up to date
- Improve user experience and navigation
- Provide intelligent search capability
- Reduce communications push; increase pull
- Target (personalize) content
- Streamline communication sources
- Reduce number of log-on prompts
- Involve active user representation and gain commitment from core businesses to enhance system acceptance, usability, and adoption

From Idea to Execution

Moving from dozens of loosely connected sites to a unified enterprise employee portal is a multi-step and multi-year process. The McKesson intranet project took nearly three years from inception to realization and played out as follows.

2005

The decision to redesign McKesson's employee portal was approved in late 2005 and funding was released in early 2006. Prior to redesigning the site, McKesson made some major technology infrastructure changes, including migration from the corporation's legacy CMS (Rhythmyx, used primarily by corporate communications)

and free-form HTML sites (used by many departmental sites) to Vignette CMS and Portal, as well as implementation of the Google Search Appliance.

2006

In April 2006, work on the redesign began in earnest, with the help of design agency, Logical Design Solutions (LDS). The project began with an initial strategic review of business requirements. The team interviewed 33 stakeholders in a variety of functional groups and at various levels (executives, managers, and staff) to get a balanced view of user requirements. A new IA and visual design for the employee portal was created, based upon feedback gathered in this initial study.

2007

In May 2007, the McKesson employee portal was launched with SSO and a "personalized view" for McKesson's four core group: three business units and corporate. At launch, 17 new applications used SSO. "The number of applications that use SSO has since increased to over 33, including core applications such as: a shared services catalog, Travelocity, Siebel, and PeopleSoft," says Thomsic.

Release I included a portal framework with flexible architecture and SSO technology to enable localized content. Users were encouraged to log in to McKNet to see both enterprise-wide content and localized content for their business unit.

In May 2007, MPT also launched its sales portal, which leveraged the new employee portal's visual design and IA, but included additional functionality to support targeted messaging to sales representatives, and additional sales reporting, marketing, education, and product information.

2008

In January 2008, six new business unit sites and 547 locations were migrated to the employee portal architecture and design. That same month, the Vignette platform was upgraded to enhance system performance, support scheduled publishing, in-context article editing, and the rotation of ads, articles, and headlines on the portal's homepage.

In March 2008, the redesigned HR portal was launched to adapt to the new employee portal's design. The HR portal provides a new dashboard for managers to manage their team information and activities, such as performance management. The HR portal also provides a personalized workspace for HR professionals and enhanced usability.

In June 2008, CIT launched its redesigned intranet presence along with a personalized workspace for IT employees.

Technology Evolution

As the portal has evolved, so has its underlying technology. The following are the main technology areas where changes have occurred:

- Replaced entire hardware infrastructure to support a new enterprise portal
- Implemented Computer Associates' Web SSO
- Enhanced employee search (white pages) application driven by corporate directory
- Provided personalization of content for authenticated users
- Implemented WebTrends platform for analytics
- Replaced Rhythmyx CMS with Vignette Portal and Vignette CMS, along with subsequent upgrades including:
    - Changed Vignette content types to improve online search results (meta tags, key words, title tags)

  - Upgraded Vignette to improve performance, implementation of scheduled publishing, and in-context editing.
  - Implemented rotation of homepage ads, articles, and headlines
  - Changed Vignette to support new "accordian" navigation paradigms (such as collapsible information lists) within portals
  - Implemented standard page templates to minimize variances across sites
  - Implemented a standard palette, iconography, and typography in Vignette's editing tool
- Planned retirement of legacy McKNet Host platform and free-form HTML sites (McKNet Host is one of the many legacy intranet platforms within the company, and historically hosted 273 different content sites and applications that will be decommissioned or migrated to the employee portal by March 31, 2009)
- Integration of SharePoint sites
- WebTrends SmartSource Data Collection was implemented in April 2008 (previously, site traffic was tracked through WebTrends using IIS logs)

INTRANET TEAM

Managing the Portal

Thomsic leads the McKesson corporate Web team. Five full-time employees—Thomsic, two producers, a portal content manager, and an external site manager—support both McKesson.com and the McKesson employee portal. Four part-time contractors provide additional content development, analytics, editorial, and design support. Thomsic and her team are in the company's Corporate Communications department.

The team manages several aspects of the intranet's ongoing operations including: gathering business requirements, maintaining the user experience and adhering to the strategic vision, establishing standards and guidelines for implementation, and training stakeholders and content owners across the company.

The CIT group dedicates three full-time employees and four contract employees (developers and support engineers) to support all of the software development and technology platforms that support McKesson.com and the McKesson employee portal.



Pictured: The intranet portal team: (standing, left to right) Drew Vecchione, Rajani Bobba, Jacob Covington, Brandt Wiley, Elana Keil, David Seghers; (sitting, left to right) Eric Deatrick, Tracy Thomsic, Anand Srinivasan, Vaughan Acton, Ying Lee, Stasia Lord.

Managing Sub-Portals

The site's different sub-portals, such as the MPT sales portal, are managed from within their own organizations. The MPT business unit manages the MPT sales portal. The team includes one full-time project manager, two full-time content strategists, and many content owners—ranging from product marketing to regional sales VPs. Mary Jo Borges leads the project, working closely with about 60 content owners and the CIT development team. "A year after the launch, they are constantly working to improve the portal and make it even more useful," says Thomsic.



Pictured: The MPT sales portal team: Web Content Strategists Terrell Yelverton (left) and Jennifer Galloway (center) and Project Manager Mary Jo Borges (right).

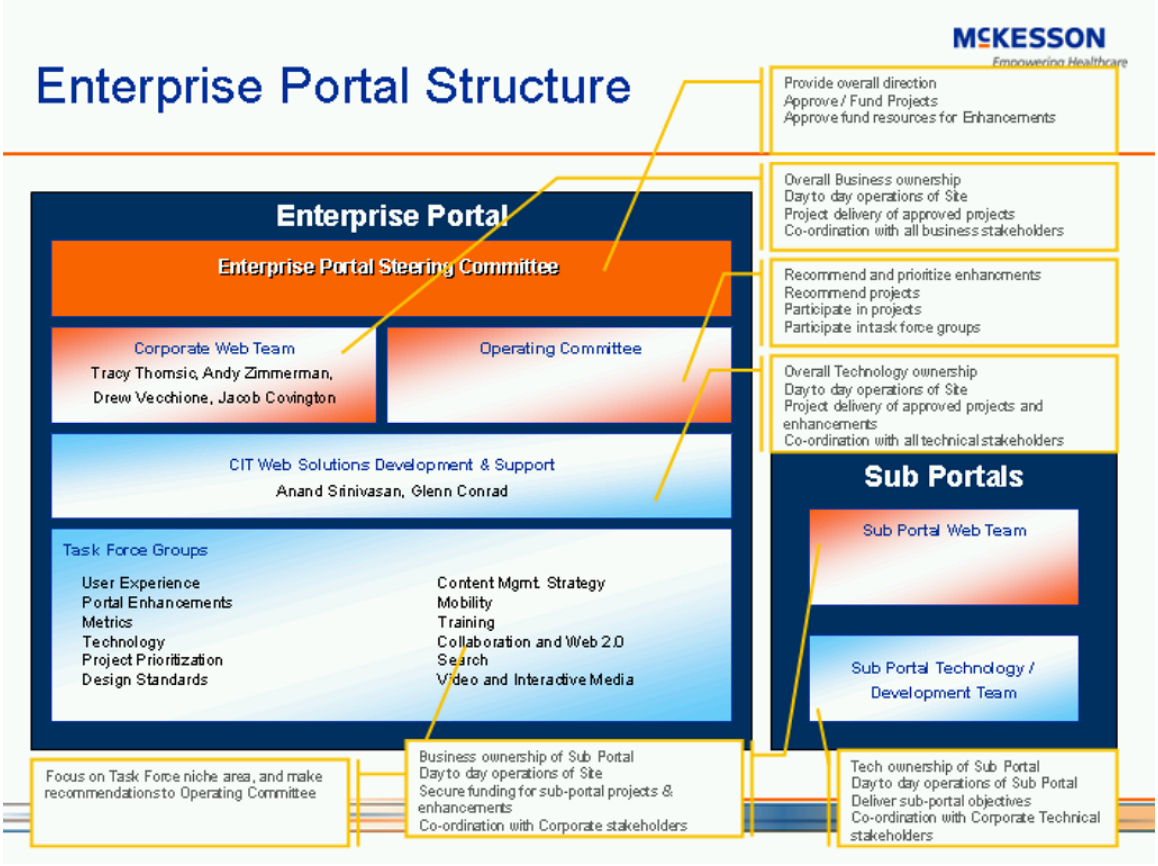
Governance

The employee portal's content and business strategy has always been managed by Corporate Communications, while CIT manages its technology (strategy and implementation). The core team consists of personnel in both the Corporate Communications and CIT organizations. Corporate Communications is a sub-organization of HR, while CIT reports directly to the corporate CIO.

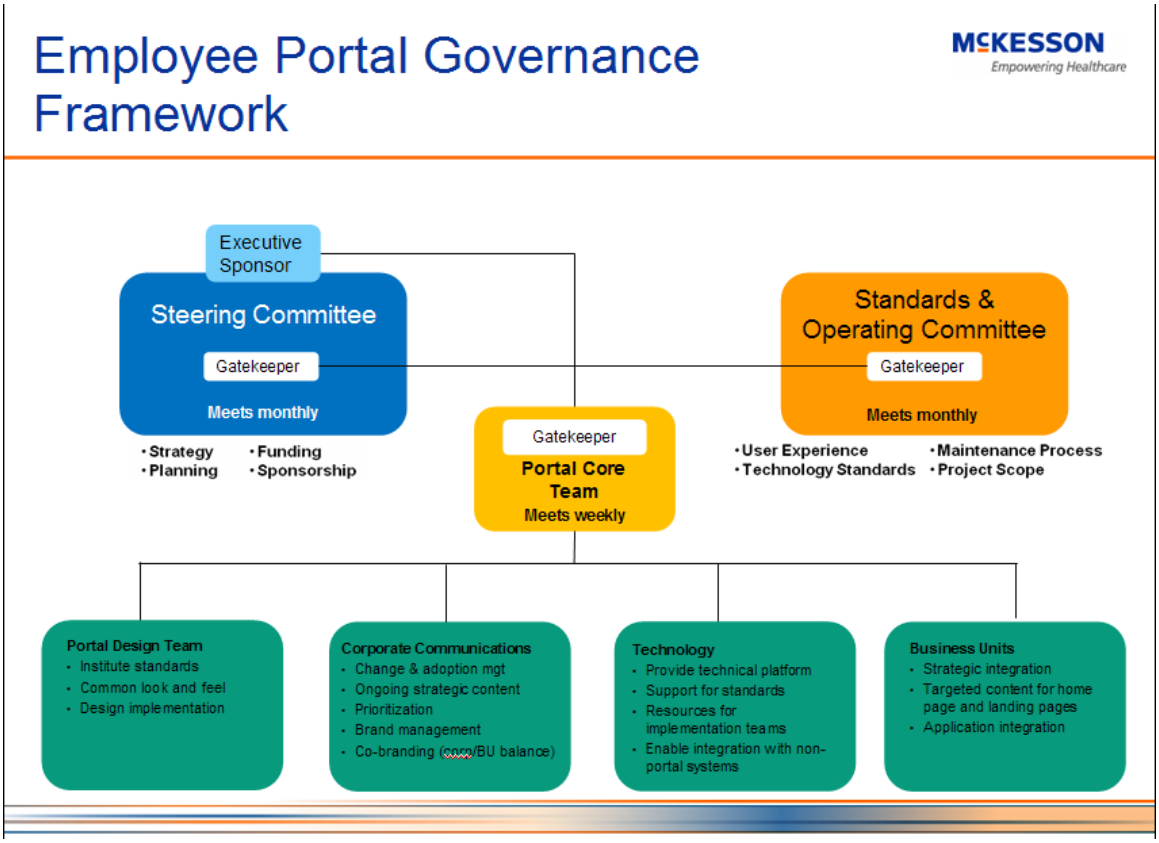
"This placement, for both groups, gives the intranet team easy access to executive management—as there are few intervening management layers—and facilitates coordinating executive approval and sponsorship for major initiatives," says Thomsic.

"For the intranet, this meant that it was easy to convince executive management of the need for the project and the justification for the budget and resource assignments," she says. "Since launch of the new portal, it has continued to be an executive priority."

McKNet is in its third phase of evolution. Two governance committees—strategic and operational—ensure that McKNet continues to meet the needs of the business and grows while keeping within the guidelines and standards set by the groups.



Pictured: The structure of the employee portal team. This team structure helps articulate how the site is governed. It also indicates how the team collects and prioritizes enhancement requests and larger projects for inclusion in future portal releases.



Pictured: The breakdown of the McKNet governance structure. It shows the dual organizational structures for McKNet: an executive steering committee that provides overall strategy and executive sponsorship for major initiatives, and a standards and operating committee that handles day-to-day governance issues. The Corporate Web Team coordinates the work of these two bodies, and is also responsible for implementation, assisted by CIT, other corporate departments, business unit representatives, and strategic agency partners.

Broad Representation

Governance and broad representation are the yin and yang of successful intranets. Steering committee representatives are nearly as important as who's governing the project, as broad representation can mean broad buy-in across the organization.

The original chairperson of the portal's strategic committee resided in the CIT organization. As of July 2008, the steering committee chair transferred to Corporate Communications. Members of the strategic committee include executives from Corporate Communications, CIT, Finance, Procurement, and HR, as well as representatives from each of the Pharmaceutical, Medical Surgical, and Provider Technologies business units.

The operational steering committee comprises content owners and technologists from 16 different business units and functional groups across the organization. This group has organized task forces to help drive enhancements to the portal. Some of the task forces that have been established include user experience, search, new media, portal enhancement prioritization, metrics, technology platforms, design and editorial standards, content management, mobility, training, collaboration, and Web 2.0 tools.

Supporting the Project with Budget *and* Staff

One thing most companies learn quickly is that large-scale portal projects don't come cheap. Successful sites are often the result of significant investment in terms of dollars *and* staff. The McKesson intranet is a good example of a company making a commitment and backing it up with both funding and staffing support.

"Since 2005, McKesson has consistently invested in our intranet platform," says Thomsic. "Our investment has exceeded $1 million annually since 2006. Regarding staff, we've doubled our staff in two years. We started with one intranet project manager in Corporate Communications, and now we have a dedicated producer and content manager."

Augmenting the Internal Team: Partnering with an Agency

For McKesson, hiring an outside agency for specific project tasks meant that the agency staff would augment the expertise of the internal team members, with each providing the project components that suited their capabilities.

McKesson employed the outside agency LDS to design and architect the site. Once LDS provided McKesson with page template specifications, all software development and implementation work was performed in-house and the internal team now manages day-to-day site operations.

LDS was heavily involved in the project's initial business requirements gathering and strategy phase, as well as its IA and visual design. The LDS technical architect was responsible for validating that the chosen technical platform (Vignette CMS and Portal technologies) could accommodate the new design.

"If McKesson decides to embark on another large scale portal project, such as launching a new business unit portal with sophisticated custom requirements," says Thomsic, "then it is likely that an agency would be engaged to help drive the requirements gathering and design phases of this project. Agencies are used where consultants with specific expertise can help McKesson to improve our processes to take the employee portal to the next level."

The McKesson team has utilized the LDS team for various initiatives over time. LDS was engaged in 2006 to redesign the MPT sales portal, in conjunction with the McKesson's employee portal redesign. MPT specified a functionally rich interface to support targeted role-based messaging to the sales force and rapid access to product, marketing, pipeline, and commission information.

In 2007, LDS was again engaged to redesign McKesson's HR portal to better align with the new McKNet user experience.

Ongoing Agency Support

Today, the employee portal is managed almost exclusively by internal staff, yet the company still hires agencies on an ad hoc basis to provide specific support services.

Agencies are sometimes hired on a contract basis to provide specific solutions, such as creating a portal standards and visual style guide. The company has also engaged specialty consulting firms to conduct customer satisfaction surveys and refine analytics reporting and measurement strategies. Finally, it periodically uses consulting agencies to gather independent analysis of the site's usability, to identify best practices in the industry, and to train content owners on areas such as writing for the Web.

GOALS AND CONSTRAINTS

The Ultimate Goal

Thomsic explains that the ultimate goal of the portal is: "to integrate and converge the way we work around a single set of capabilities." In one to three years, the portal should provide the following business improvements:

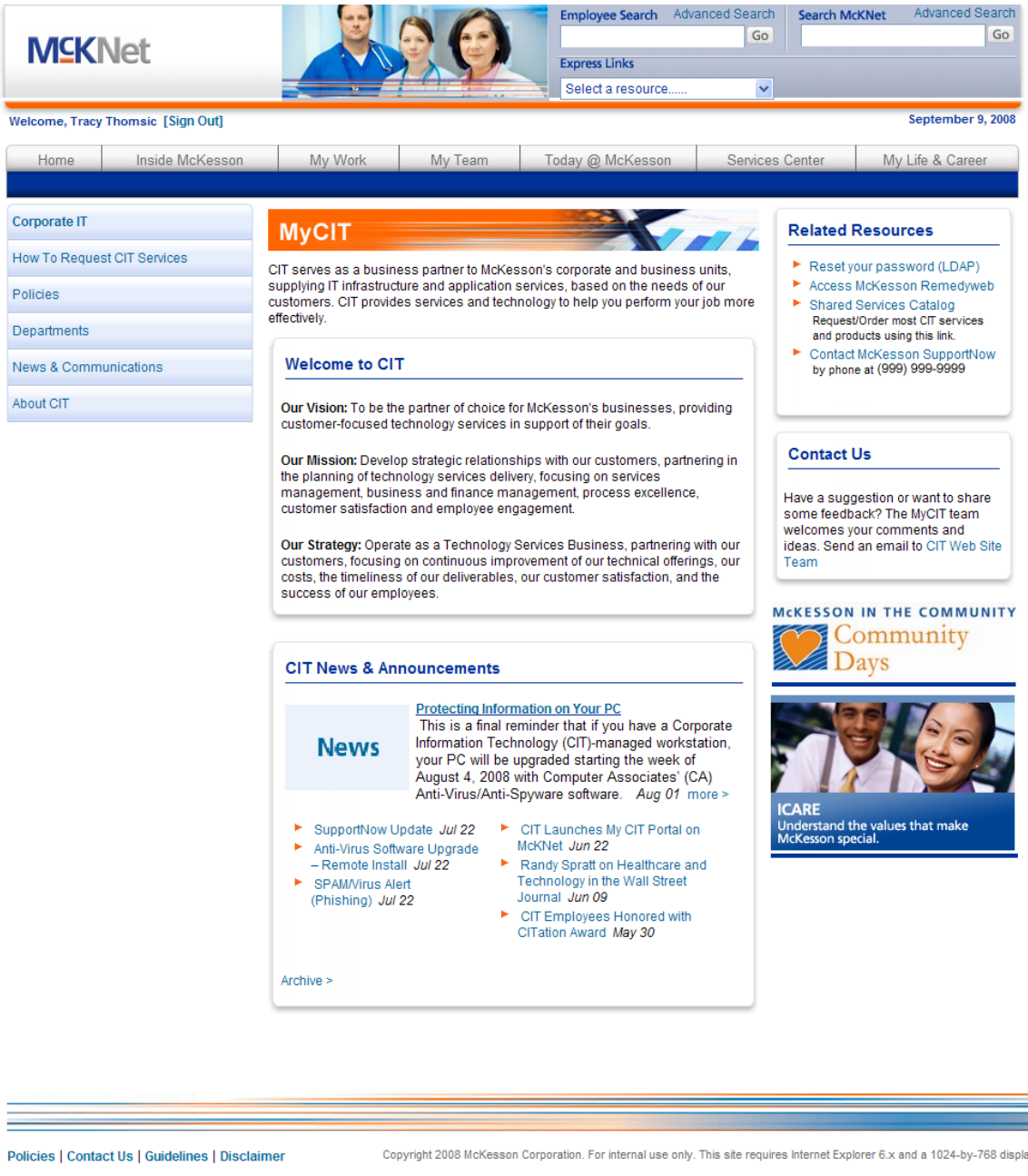
- **Facilitate collaboration** with social networking and community tools
- **Improve knowledge transfer** (for example, provide a wiki to capture and transfer communications)
- **Automate business processes** through improved workflow capabilities and project management across businesses
- **Reduce costs** by providing a single way of working/doing business (and thereby reducing costs and learning burdens)
- **Improve productivity** through precise information flows that customize and target information so employees get relevant information and tools for their jobs
- **Enable mobility** by supporting multiple devices, not just PCs
- **Gain global economies of scale** and hide McKesson's corporate complexities behind the scenes
- **Improve employees' ability to perform transactional work** irrespective of job function and role
- **Centralize procurement information** and provide feedback mechanisms for employees to drive improvements to corporate programs

Each of the employee portal's sub-portal implementations (for HR, MPT sales, and CIT) also aim to support these themes.

> **HR portal.** The HR portal was designed to support the needs of HR and employees. Managers and employees needed a place to go for people management tools, personal information, and professional development tools.
>
> "Over the past few years, we've received feedback that employees and managers would like personal and team information and tools to be easier to find and use. In the redesign, we've focused on putting content and tools together in logical groupings to make finding information and completing tasks easier," said Julie Person, program manager. "The HR portal enhancements are part of McKesson's overall plan to bring employees and managers better tools for performing quality work, allowing all of us to contribute to McKesson's success."
>
> **MPT sales portal.** "The portal is the primary channel for content and communication with the sales force, so it's very important for us to listen to our users and determine what content and functionality they need on the portal to make them more efficient and productive," says Borges.
>
> Borges says that the team works with content owners to ensure that portal information is always up-to-date. "We make more substantial changes—such as incorporating new pages, new technology and new tools into the portal—six times a year," she says. "We also wanted to streamline communications to sales by moving from a "push" to a "pull" environment, so that sales and marketing managers did not feel they had to e-mail sales everything they may need. E-mail could be used for critical things, but everything else would

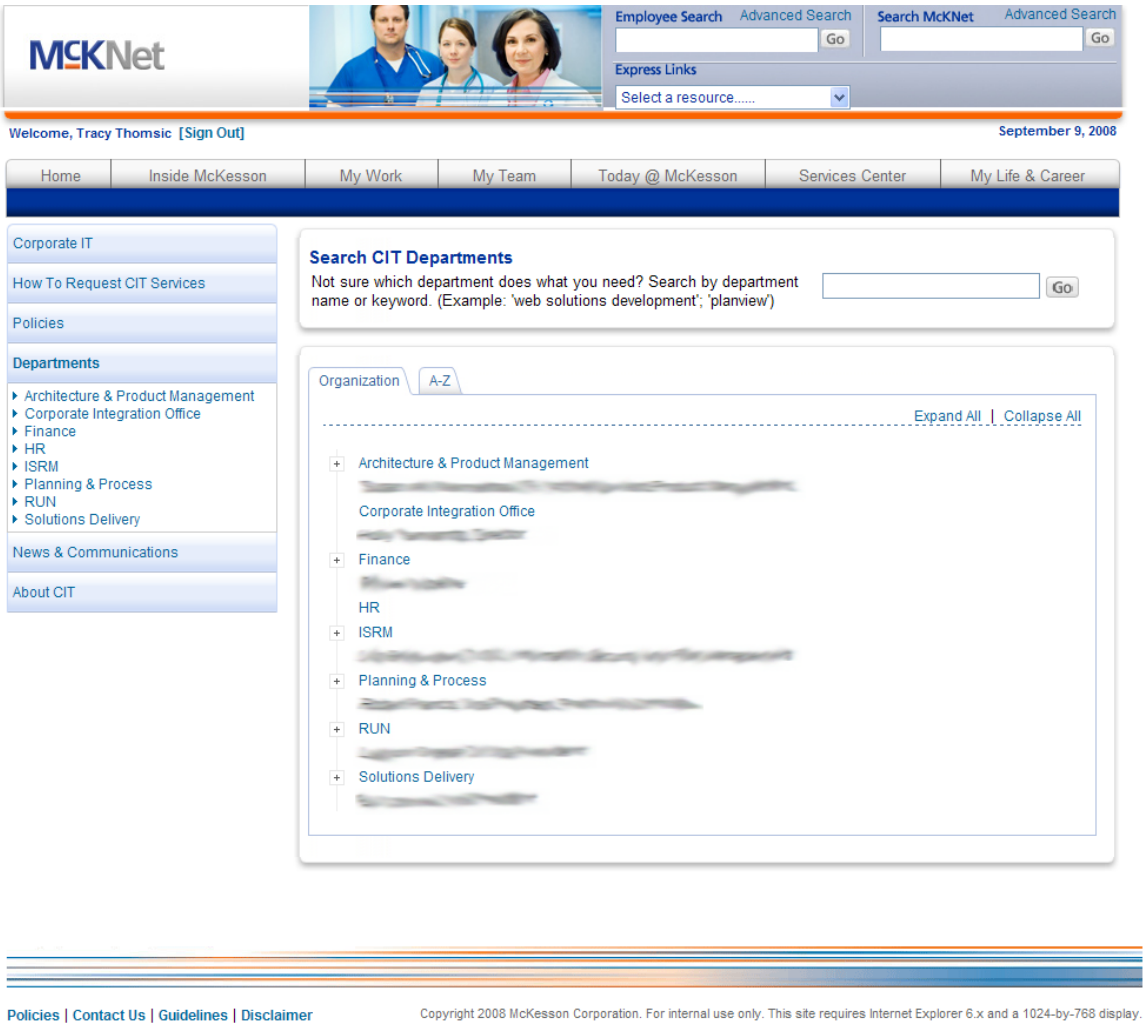
be available in the sales portal. This allowed sales people to get the information they needed, when they needed it."

CIT portal. The CIT portal aggregates information for CIT personnel on processes and procedure, and includes a wiki for knowledge sharing.



Pictured: *My CIT*, the portal homepage for the Corporate IT service center. The portal's homepage gives employees access to CIT services and helps them find resources and learn how to best engage with CIT on different issues.

10 Best Intranets: McKesson Corporation



Pictured: The CIT *Departments* page. This guide to CIT structure lets users search CIT for the appropriate department, navigate an expandable org chart, and browse and filter a list of CIT departments organized alphabetically.

Constraints

As Thomsic notes, McKesson faces several constraints in undertaking a project of the employee portal's size, budget, and complexity.

- **Budget.** "The budgetary approval process for capital expenditures at McKesson typically requires a six-month lead time," says Thomsic. "In order to engage in projects of this magnitude, a business justification must be presented to McKesson, which clearly shows the expected value to the corporation, and its return on investment."

  Also, employee performance is often tied to achievement of tangible objectives met within a fiscal year, says Thomsic, which factors into any project of this scale.

- **Regulation.** The health care industry is highly regulated, so the company faces stringent security requirements that apply to an intranet project.

  Many of McKesson's employees use kiosks to access the intranet, creating another factor affecting the site and site security. And, like many companies

creating a large-scale intranet portal, they have many applications running on legacy platforms that must be factored into the site planning.

- **Security.** McKesson's pharmaceutical distribution business requires strict security over the dissemination of certain types of information, such as distribution center locations, identity of personnel in these locations, shipping schedules, routes, and manifests. In many locations, employees don't have individual computers, but share access to the intranet through kiosks, logging in via their employee ID to access personal data. Different employee classes also have access to different information on company policies and benefits.
- **Legacy systems.** Many of McKesson's internal applications run on legacy systems or on disparate platforms from acquired businesses. Thus, as Thomsic notes, "it's a challenge to provide integrated access to these applications through a single Web interface."

TIMELINE

HR portal

The HR portal project kicked-off in September 2007 and the site launched on March 24, 2008. With only six months from start to finish, the McKesson team had a lot of work to complete under an aggressive timeline.

The project began with a design phase; a visual proof of concept was completed by early December 2007. The build phase, which included the technical implementation and content development, started in December and was completed in March 2008.

Subsequent to launch, the team continued to refine the site's change leadership and communications plan, which was completed in early June 2008.

Employee Portal

The employee portal has evolved over multiple redesign phases, and a project roadmap guides the ongoing work. "We do one major release a year with enhancement releases every six weeks in between major releases," says Thomsic.

Following is an outline of the employee portal's project release cycles.

Release 1: May 2007 (10 months to complete)

Release 1 offered the following enhancements:

- **Web SSO** integrated sign-on to multiple intranet applications into one sign-on.
- **Modular, scalable IA** laid the foundation for future releases.
- **Improved user experience** included a new look and feel, redesigned navigation, and easier access to tools and resources.
- **Integrated strategic communications** combined multiple communications channels from different business units and corporate groups into a single news channel accessible company-wide.

Release 2: March 2008 (12 months to complete)

Release 2 offered the following enhancements:

- **HR self-service** integrated self-service tools and content via SSO.

- **Business unit integration** integrated over 500 McKesson locations to enable personalized communications channels specific to each location.
- **Process-driven workspace** delivered tools and content at appropriate points in a process.
- **Multi-channel content delivery** gave users access to rich media content (audio and video) and communication tools (including instant messaging).

Release 3, scheduled for March 2009

Release 3 has a 12-month schedule and will include:

- **An advanced collaboration platform** that will let employees throughout the company find other employees, share information, tag and bookmark internal and external resources, and participate in group discussion on relevant topics.
- **A universal inbox** will be a single, aggregated inbox for process-related messaging from internal apps, designed to streamline management functions such as invoice approvals, contractor and vendor resources, travel and entertainment expenses, performance, and procurement.

MPT Sales Portal

The MPT sales portal was also launched in May 2007. The design team leveraged the visual design specifications created by LDS, but changed the *My Work* portlet to adapt it to the needs of the sales force. The MPT sales portal team is located in Alpharetta, Georgia, and worked on a parallel track with the employee portal team, located at the company's San Francisco headquarters.

Technology Timeline

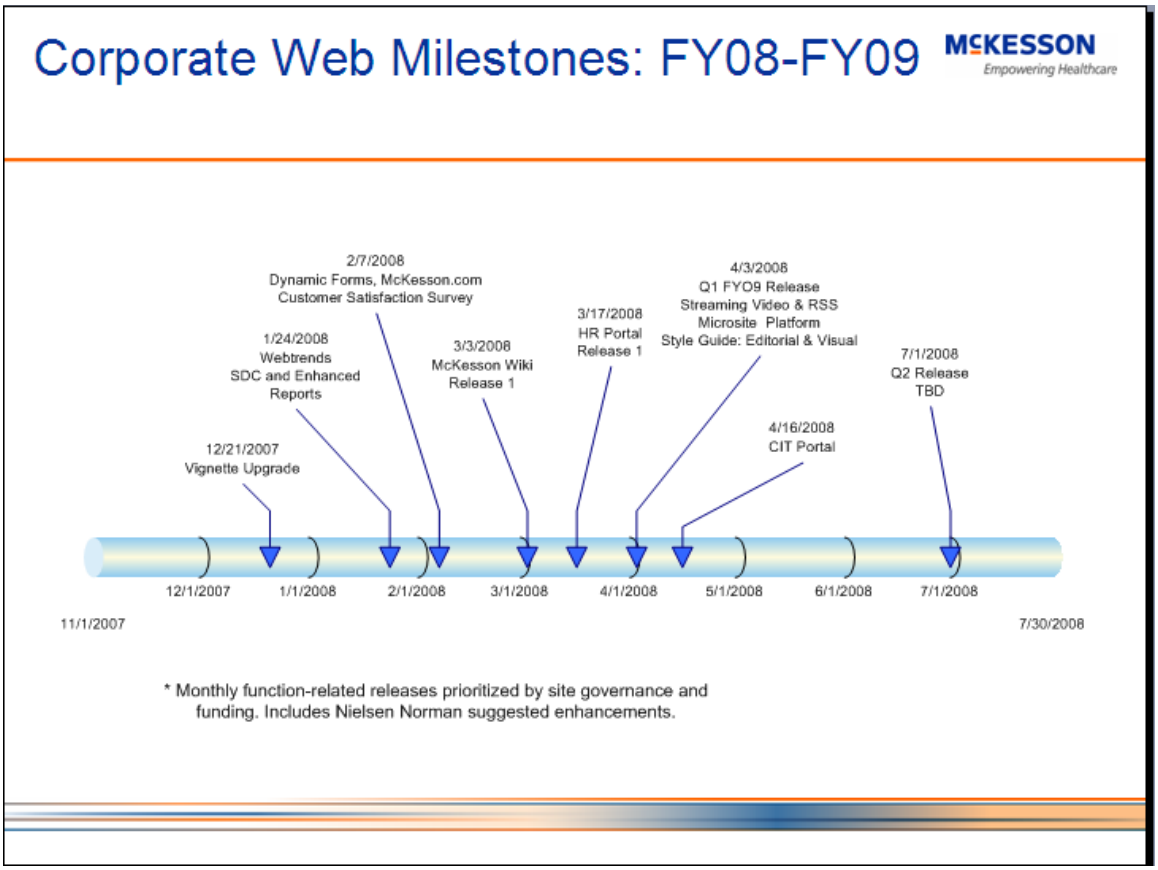
Following are the relevant milestones for the intranet's technology upgrades.

November–December 2007:

- Architecture redesigned, including replacing the hardware and software platforms
- Replaced the CMS
- Migrated portal content to the Vignette Portal and CMS.

January 2008:

- Implemented WebTrends



Pictured: The timeline for the intranet's redesign phases from November 2007 through July 2008.

USERS

The McKesson employee portal is targeted to 50,000 employees and contractors and is used by office workers, technologists, sales people, customer service, distribution, and most business functions across 30 business units in the US, Europe, and Canada.

USER TASKS

Employee Portal

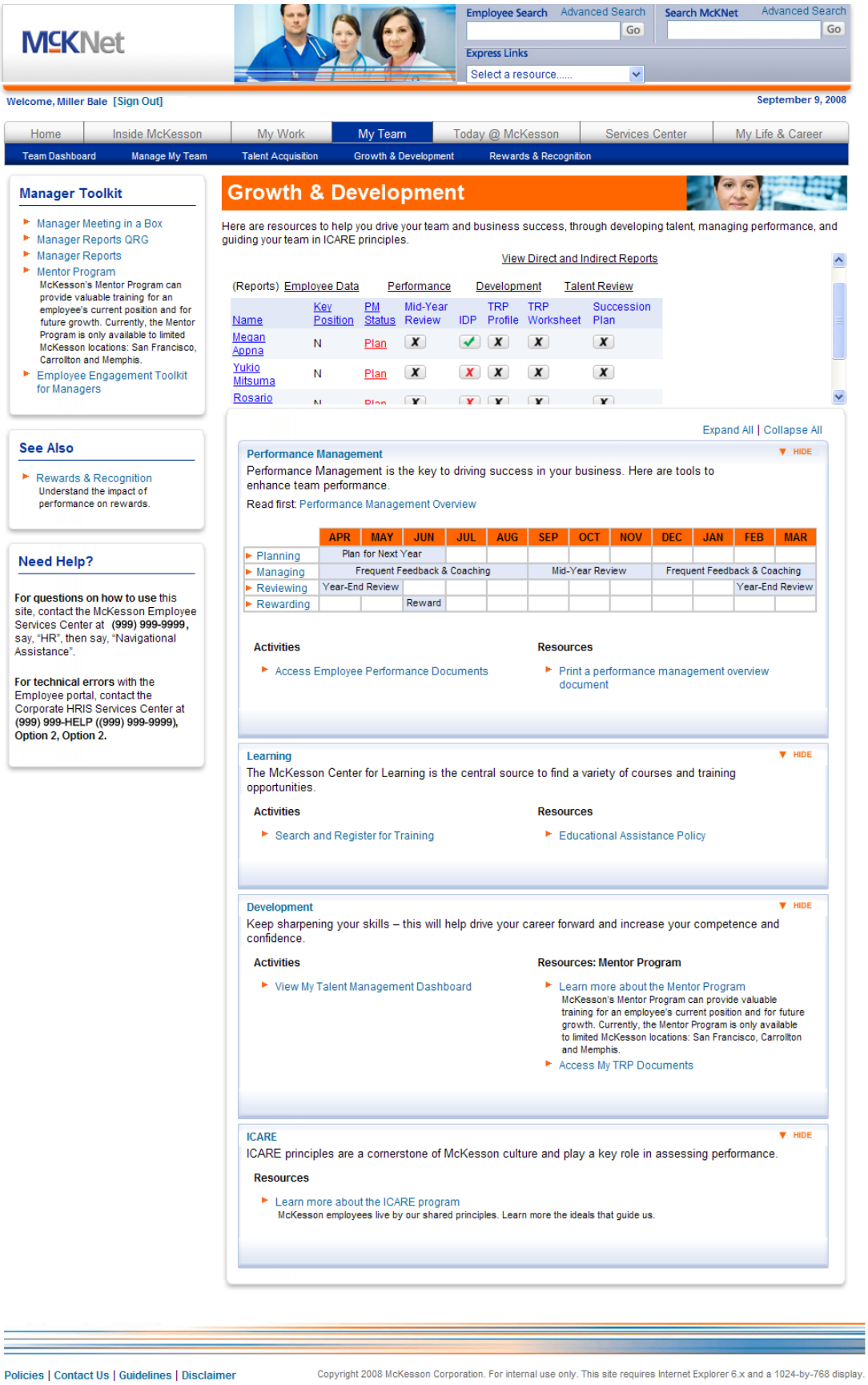
Following are the most common user tasks on the employee portal.

- Search the employee directory
- Access shared service applications for such tasks as ordering supplies and equipment, filing expense reports, booking travel, and requesting help from IT
- Manage employment-related functions such as performance reviews, benefits, and payment records
- Catch up with the latest company news
- Find other business units and corporate groups to work with or request information from

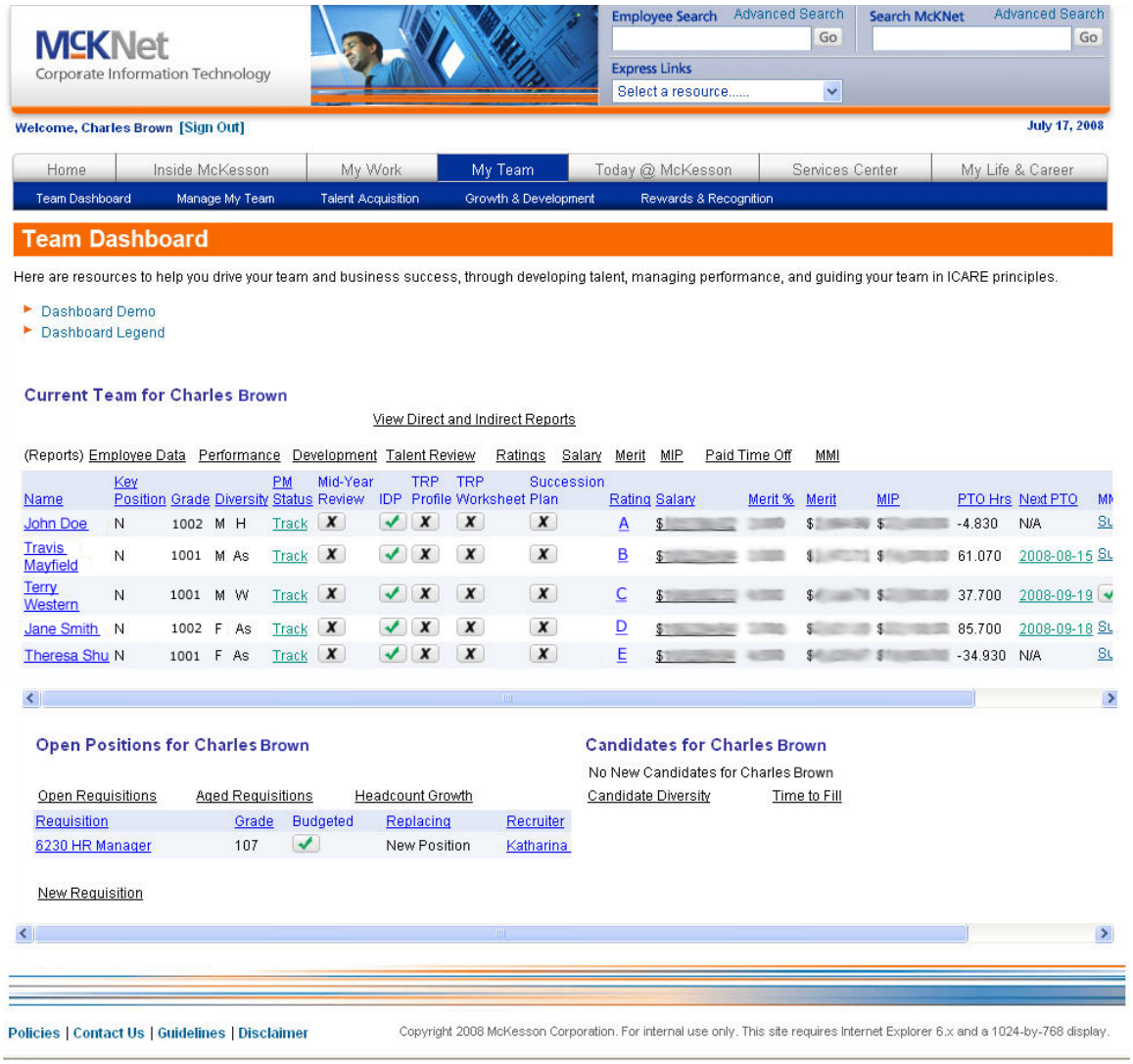
10 Best Intranets: McKesson Corporation

- Order equipment for new employees and help managers manage employee on-boarding in one place

10 Best Intranets: McKesson Corporation



Pictured: The *My Team* section's *Growth and Development* page. Managers and their team members can monitor their progress in completing performance management tasks, access resources for training and mentoring, and learn about the ICARE company values program.



Pictured: The *Team Dashboard* for managers includes performance information about employees, as well as open positions and candidate status. The HR portal implemented this dashboard to give managers a snapshot of their entire team and thus help them better manage their direct reports to create high-performing work teams.

MPT Sales Portal

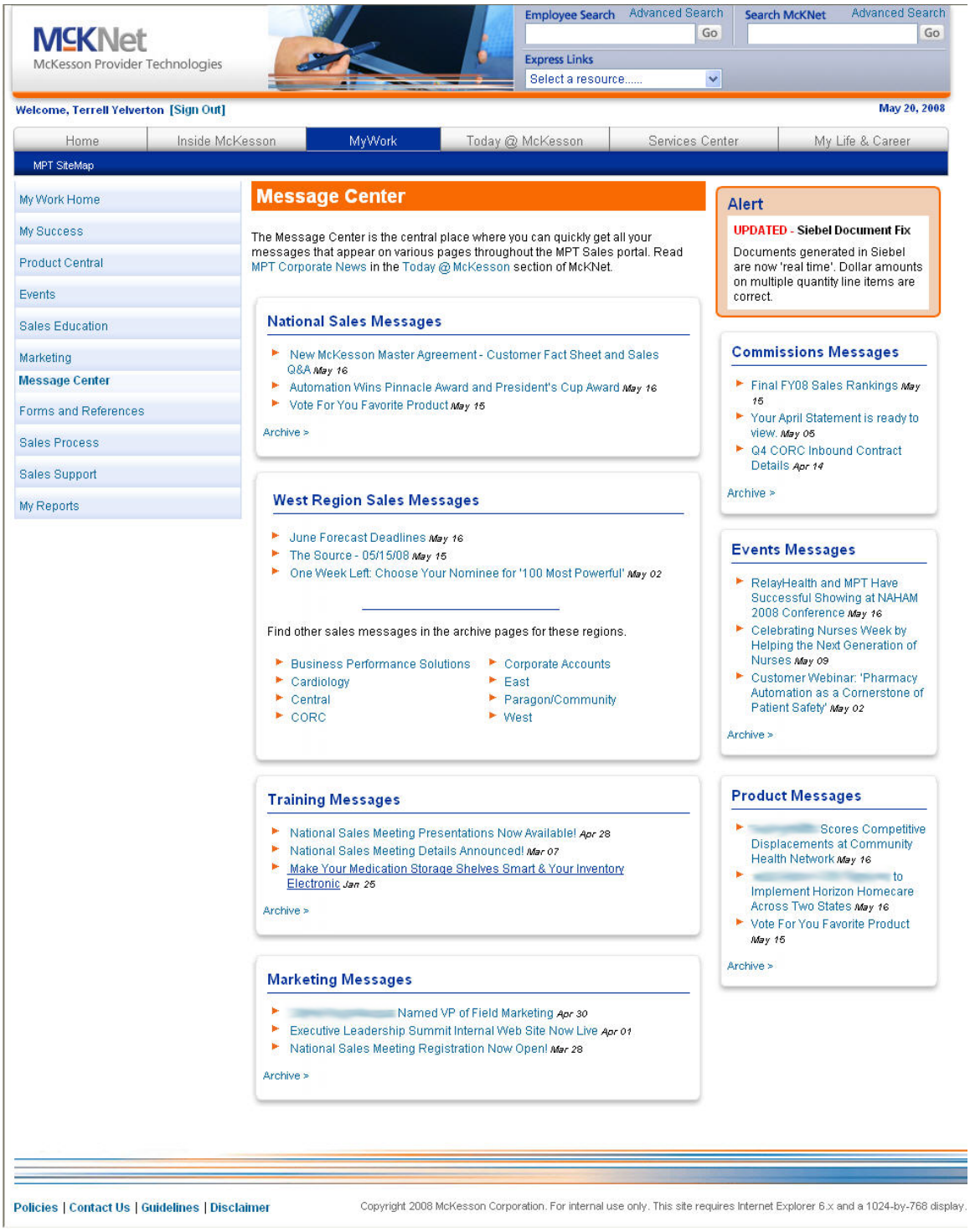
On the MPT sales portal, the most commonly used features include:

- SSO access to enterprise systems and sales tools
- Reporting integrated with Siebel and Business Objects

10 Best Intranets: McKesson Corporation

- Access to a central repository for messaging
- Centralized product collateral
- Sales education and events calendars with the option to add events to Outlook
- Sales process navigation through each funnel stage

10 Best Intranets: McKesson Corporation

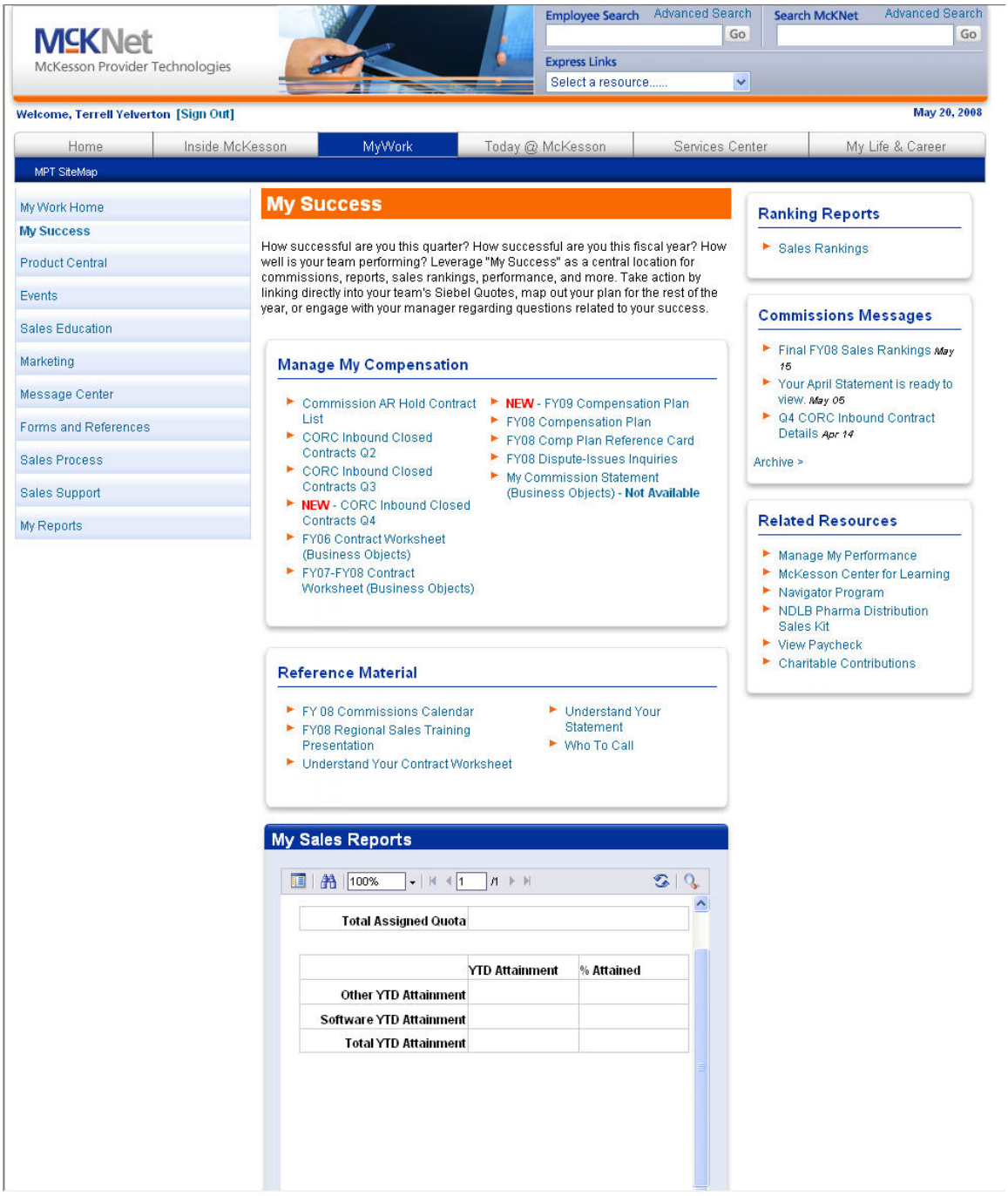


Pictured: The *Message Center* offers personalized messaging for salespeople on the sales portal.

10 Best Intranets: McKesson Corporation



Pictured: The sale's portal's *Product Central* section gives users access to centralized product information.



Pictured: The MPT sales portal's *My Success* page gives users a snapshot of their current status. It does this by integrating sales tools, reporting, and personalized sales funnel information.

DESIGN PROCESS AND USABILITY ACTIVITIES

Overview

The employee portal's redesign process began shortly after McKesson.com, the company's public website, was redesigned and launched. "McKesson.com's new look and feel leveraged a new brand identity for McKesson, says Thomsic, "but the intranet's design still appeared outdated and the user experience was disjointed as the site had grown organically, without any oversight or standards."

Thomsic says that executives in CIT, Corporate Communications, and HR all believed that the redesign could bring productivity gains for the corporation, as well as cultural gains for employees. McKesson's corporate Web team and the CIT development group shared responsibility for managing both sites from an architectural and operational level. "Much had been learned from the redesign of the public website, so this provided some momentum for getting started," she says.

Usability Activities

Employee Portal

In February 2008, the team kicked off the usability research with a benchmark usability test. Getting a benchmark helped the team see where they were already doing things right and where they needed improvement. The study included 21 intranet users at McKesson headquarters. They were asked to complete 14 key tasks. Some of the task areas included the employee directory, direct deposit, paid time off, W-4 form, training, technical support, job search, matching charitable contributions, annual report, checking McKesson's expense policy, and McKesson's Political Action Committee.

Thomsic reports that most people were able to complete all tasks during a 90-minute session. Employee search was identified as the portal's "killer app" as it both worked well and people knew how to use it efficiently.

Tasks in the HR area received good feedback, while search was an area identified for improvements. Thomsic says that the team is currently working on an initiative to make those improvements. "New tags for key words, alternate titles, and metadata have been added to several content types in Vignette to improve the quality of search results," she says.

Shortly after this study was concluded, in March 2008, the new HR portal was also released.

HR Portal

"We did multiple rounds of usability tests," says Person. "First, field tests were done by LDS using card sorts. Later in the project, close to going live, we did end-user testing—led by the McKesson team—which was to test the design using a test site"

"The last step we did was, we listened in on support calls, and provided training sessions to the support center," she says. "That way, we could use the support team immediately after we went live for daily feedback."

MPT Sales Portal

The Sales Advisory Board was heavily engaged with McKesson's design agency LDS on the sales portal's design process. LDS stepped the Sales Advisory Board through wireframes to ensure designs were on target. And, during the sales portal's initial design and rollout, LDS sponsored card sorting sticky notes activities.

"We have not done any formal usability testing," says Borges. "But we stay close in touch with our users via the Sales Advisory Committee and support. Also, a sales portal scavenger hunt activity is done with all our new hires every month, and we have sales portal kiosks available at our sales meeting and mid-year sales meeting."

Borges and her team are able to gather a lot of informal feedback during these activities.

Plans are under way to begin more formal usability testing in the next year.

URL AND ACCESS

McKNet is available at http://mcknet.mckesson.com/. Every McKesson laptop is provided with this page as the start-up in the browser.

Remote access is via the Web at webaccess.mckesson.com where employees can access the employee portal, along with other applications such as e-mail, SharePoint, SAP, and HR. Users must have a McKesson PIN and a token code to authenticate themselves prior to gaining access to these sites.

Because of their job roles, nearly half of the McKesson workforce accesses the intranet via kiosks. Among those employees are those at the company's distribution centers who pick and pack orders for shipment. Kiosk users are primarily interested in using the intranet to perform HR-related transactions and to learn about McKesson.

TECHNOLOGY

The McKesson intranet uses the following technologies: Vignette Portal, Vignette CMS, Weblogic, CA Site Minder, Novell eDirectory, Microsoft SQL Server, Adobe Flash, HTML, Javascript, AJAX, Java/J2EE, Microsoft .NET, Concurrent Versioning System, Eclipse IDE, WebTrends, Adobe Photoshop, EWebEditPro, Windows Media Server, and Google Search Appliance.

WEB SITE ANALYSIS AND SEARCH

Peridot LLC, a Web analytics firm headquartered in Bothell, Washington, helped McKesson measure the impact of changes made to the employee portal's user interface. Peridot helped McKesson analyze key performance indicators for the site, including traffic, reach, engagement, and top search terms. Peridot also modified the monthly WebTrends dashboard to align with McKesson's business needs.

With SDC, Java-code is used to measure McKNet site traffic and provide an enhanced ability to track behavioral data. "For example," says Thomsic, "the MPT sales portal business sponsors wanted to know who was accessing their site—and specific content—based on a user's functional role (manager, operations) and region."

The code-based implementation of WebTrends records the metadata so that it can now be tracked. In addition, using SDC code, WebTrends can track searches within and across its different portals. Historically, searches were tracked on the entire McKNet domain. Now, searches can be isolated for the individual portals, including the HR, CIT, and MPT sales portals.

Overall, the WebTrends SDC implementation has laid the groundwork for metrics tracking at McKesson, and is helping site owners optimize their content appropriately.

Site traffic and search analysis is reported monthly. Following are highlights from McKesson's July 2008 *Employee Portal Site Metrics Report*.

10 Best Intranets: McKesson Corporation

Site Metrics Report Highlights

July 2008

Traffic results:

- Overall, there were more than 1.5M page views and over 751,000 visits reported on McKNet during July 2008.
- Almost 640,000 of the total visits went to the McKNet homepage, which represents 85% of all visits across the site.

Traffic changes:

- There was a large increase in page views for both the *Inside McKesson* site's sections and the *Today@McKesson* site.
- There was a decrease in visits to each site as a whole, including the homepages.
- This decrease could be due to the timeframe (July is both a "vacationing month" and includes the 4th of July holiday).

Search changes:

- There were almost 30,000 site searches in July 2008, an increase of 15% from the previous month, and a 21% increase compared with the three-months trailing average.
- The top search terms on McKNet continue to be "mro" (an internal management process), "distops" (an internal tool for distribution operations), and "per-se" (a recently acquired business).

Engagement:

- About 70% of all visitors were on the site for one minute or less, with an average visit duration of a little more than 16 minutes. According to Thomsic, this reflects the portal's function as a gateway to internal applications. "Most users are looking for a specific tool. They find it, run it, and leave the portal, terminating their portal visit," she says. "To the extent that this statistic means people are finding the tools they want quickly, it's a good thing. We continue to investigate our users' behavior to determine if there are unmet needs."

JULY SITE METRICS REPORT (PARTIAL)
INCLUDING SEARCH TERM RESULTS

Rank	Query term	July '08		
		Visits	Rank	% of total search queries
1	Distops	183	1	0.71%
2	Mro	165	2	0.64%
3	per-se	102	3	0.39%
4	Oars	100	4	0.39%

5	job families	97	5	0.38%
6	job family	93	6	0.36%
7	six sigma	88	7	0.34%
8	SharePoint	85	8	0.33%
9	weight watchers	83	9	0.32%
10	live meeting	72	10	0.28%
11	Blackberry	69	11	0.27%
12	Weather	69	12	0.27%
13	ICARE	67	13	0.26%
14	Kronos	62	14	0.24%
15	CareBridge	60	15	0.23%
16	Support now	58	16	0.22%
17	Webmail	58	17	0.22%
18	Help desk	58	18	0.22%
19	Scoreboard	57	19	0.22%
20	Mcfs	57	20	0.22%
21	401k	56	21	0.22%
22	Mpower	55	22	0.21%
23	Office communicator	55	23	0.21%
24	DC INVENTORY	54	24	0.21%
25	Jobs	54	25	0.21%

Search Technology

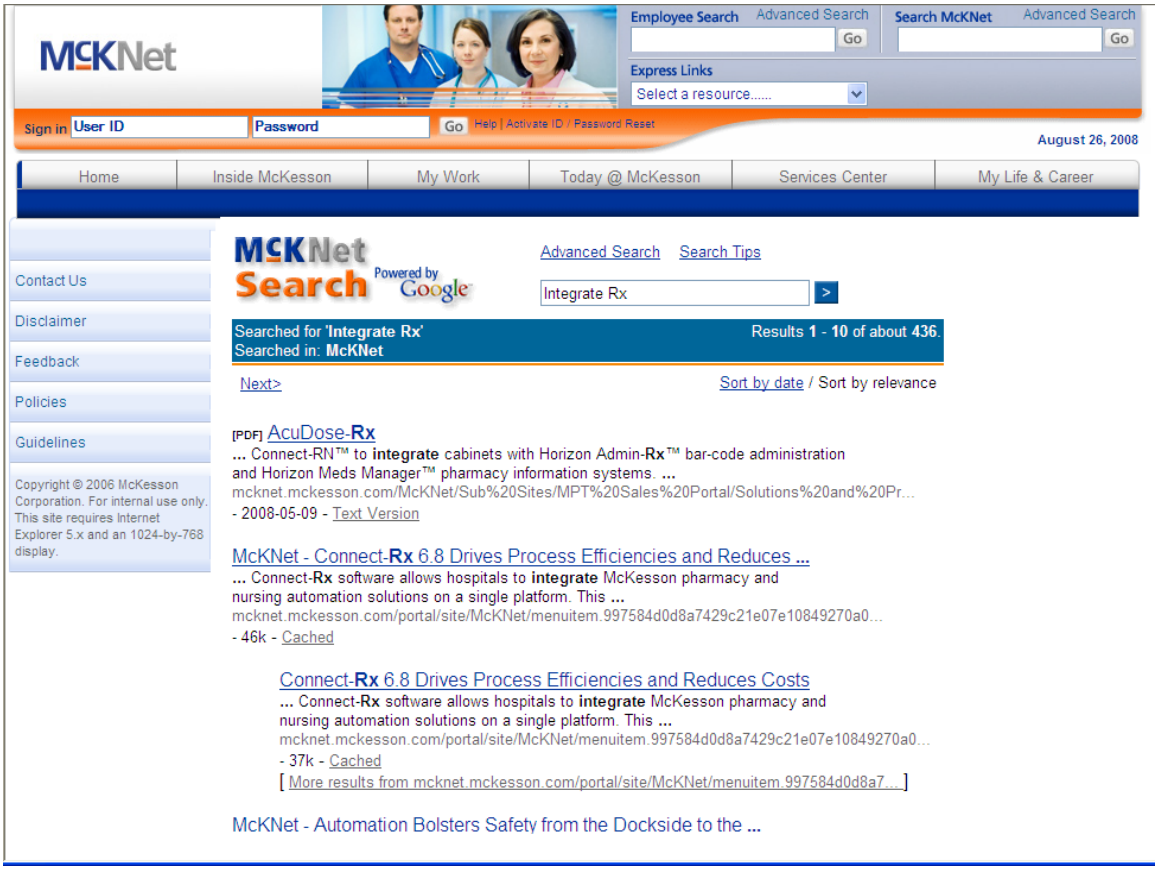
As part of the intranet project, the McKesson team replaced the underlying search technology, too. “On the old intranet, we had a Verity search engine that was very ineffective, and required manual configuration,” says Thomsic. “Google Search Appliance had a proven technology and was bringing their product to the enterprise for a turnkey solution that automatically crawled the intranet and required little manual effort.”

Search enhancements are underway to address the current challenge of finding authenticated and entitled content in the search results. This can be managed through the Google technology, but has not been addressed yet. The team plans to enhance the search in the coming year, including the introduction of search driven by users’ tagged and bookmarked content.

“By default, the Google Search Appliance didn’t have access to scan the intranet for content sitting behind authentication barriers,” says Thomsic. “Enabling it to do so requires additional configuration that we haven’t had the resources yet to address.”

By the time this report is published, the team will have completed the search improvements.

10 Best Intranets: McKesson Corporation



Pictured: A sample search result for the term “Integrate Rx” (a McKesson product).

10 Best Intranets: McKesson Corporation



Pictured: The *Company News* portlet. This screen shows a recent mention of McKesson in the press. Users access this portlet landing page from a link in the homepage's *Today@McKesson* portlet.



Pictured: A *Company News* listing page. This screen shows a listing of all press mentions of McKesson in last month. Users access the page through the *Company News* (left nav) tab, by clicking on *2008*.

CONTENT MANAGEMENT

Technology

McKNet uses Vignette CMS version 7.3.1.

Content Ownership

Content ownership, administration, and maintenance are distributed differently for the three McKesson portals based on the particular site's needs.

McKNet employee portal. Content ownership is distributed across company groups, with core areas—including the homepage—owned by Corporate Communications. Business unit and functional group sub-areas are owned by someone within the target unit or group—typically, an internal communications representative or program manager. As Thomsic explains, these owners are content SMEs selected by their group's (director- or manager-level) representative to the McKNet Standards and Operating Committee.

MPT sales portal. The MPT sales portal team consists of a manager and two Web content strategists. The team works with three different groups:

executive sponsors, content owners, and sales users. The sales portal's executive sponsor is the group president of customer operations. The portal's steering committee consists of sales and marketing VPs. MPT has about 60 content owners with one designated business owner for each main area of the sales portal. Sales users are represented by the Sales Advisory Committee, which comprises sales users from various roles and regions.

HR portal. Within HR, the key content owners are the SMEs within each Center of Excellence. The four Centers of Excellence are Talent Management, Compensation and Benefits, Enterprise HR, and Diversity and Inclusion. The Employee Service Center has final approval on all content changes so that it's aware of the changes that it will need to support.

Creating Content

The intranet team has developed a content type library and a set of generic/default templates to assist content creators. Once the content is entered via the CMS, it automatically inherits the templates and styles.

"We have an editorial and design style guide for the enterprise portal, the sub-portals, and—as of June 2008—the SharePoint team sites," says Thomsic. "The intranet style guide and design guidelines are used to inform the users."

"Considering that we had no standards for McKNet two years ago, this is a huge leap forward," she says. "These guides were developed by our agency partners and are now maintained by in-house staff. We found that just showing users what pages and sites look like encourages adoption, reduces anxiety, and saves our team training and support time."

MOBILE

Mobile access is still a work in progress for McKNet. "The site can be accessed over a company-provided mobile device," says Thomsic. "However, the user interface is not specifically designed for this experience, and hence the user experience is very poor."

The team acknowledges that there is a demand for mobile access for certain content areas, especially on the MPT sales portal, and has placed a mobile initiative on the portal roadmap for inclusion in future releases.

"Eventually, our goal is to make the entire site accessible via mobile device," says Thomsic. "But the first areas in demand are travel planning and sales support. Right now, we don't have a definite schedule for mobile devices, but it's on our roadmap for a FY2010 implementation."

FEATURES

Following are some of McKNet's outstanding features:

The homepage. The site's homepage offers a single access point to tools and information, providing news and content personalized by business unit/location, personalized work-related content and tools, and ad banners to drive users deeper within the site. Each of the sections listed below also has a presence on the homepage to encourage further exploration of the site.

Inside McKesson. This section is dedicated to business literacy and supporting a unified culture. It features company history and background, as well as news, programs, and policies.

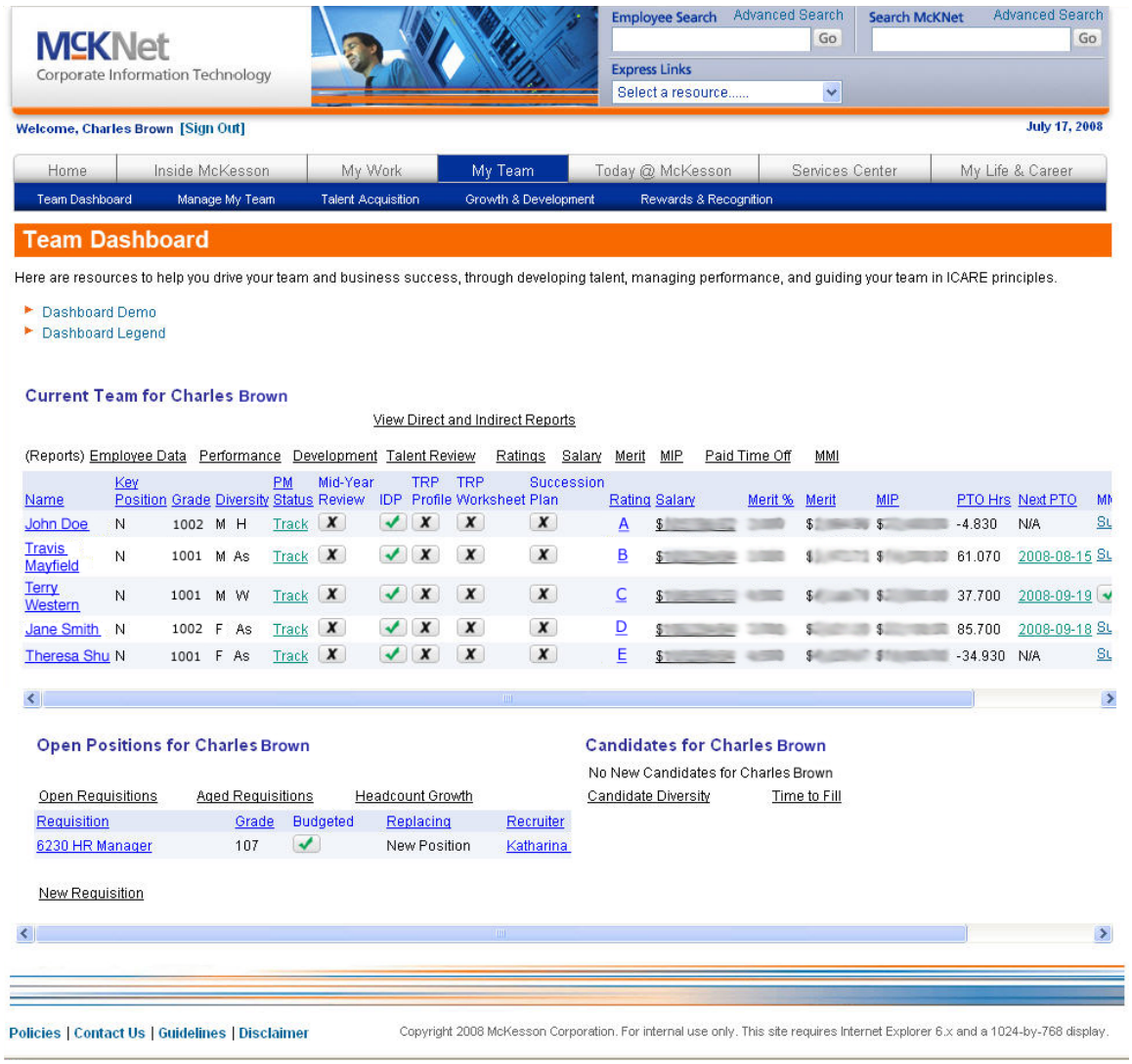
10 Best Intranets: McKesson Corporation



Pictured: The *Inside McKesson* page. This page contains company news and links to critical internal content, including sub-sites and portlets for business units and corporate departments.

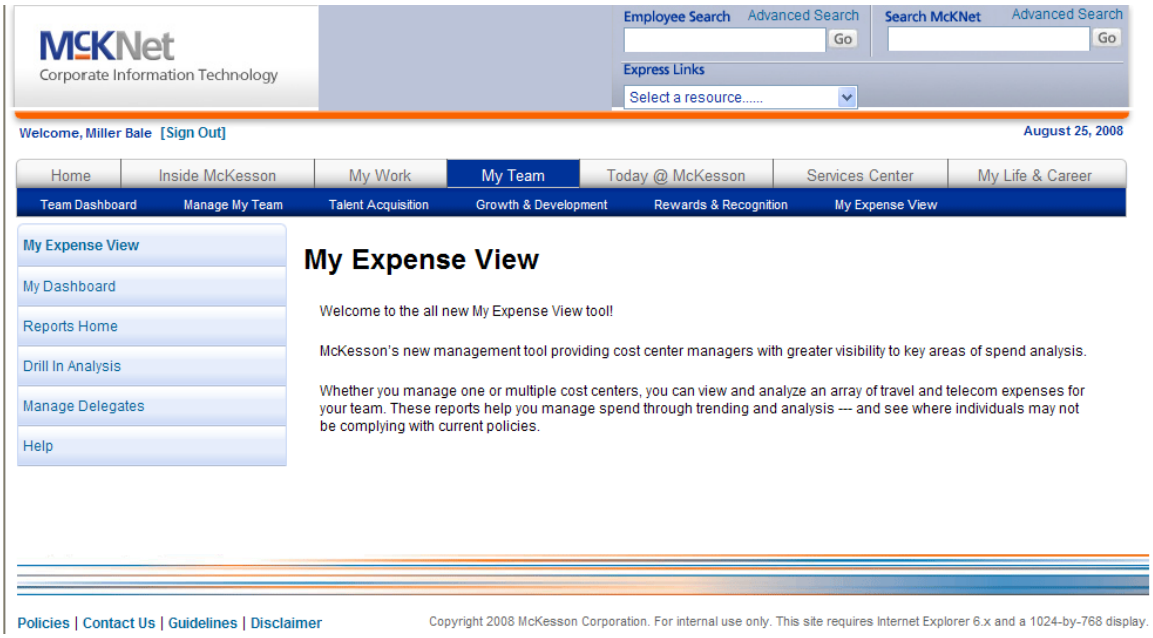
My Work. This section offers an access point for all resources pertinent to an individual employee's job, personalized by job function. For example, a sales manager would see sales reports, commission statistics, marketing materials, and updates available all in one place. This feature replaces the multitude of e-mails that bombarded salespeople prior to its arrival. Taking this information out of e-mails also makes it easier to track, search, or update.

Expense View. The *Expense View* dashboard and application enables managers to view and analyze expenses in great detail, including travel, entertainment, and telecommunications.



Pictured: The *Team Dashboard* for a manager. It includes performance information about employees, as well as open positions and candidate status.

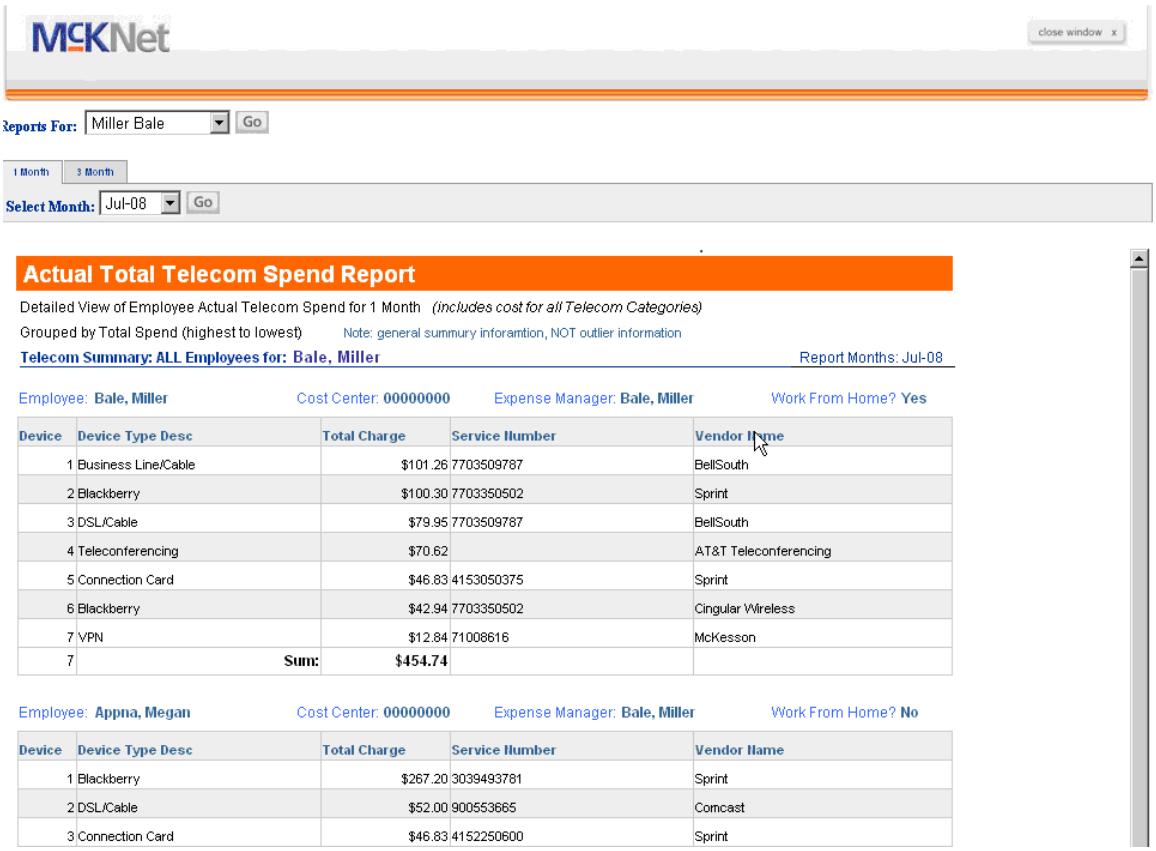
10 Best Intranets: McKesson Corporation



Pictured: The *My Expense View* in the HR portal lets managers analyze expenses in detail.



Pictured: The *Reports Home* in the *Expense View* section. This page offers a manager access to reports on departmental expenses.



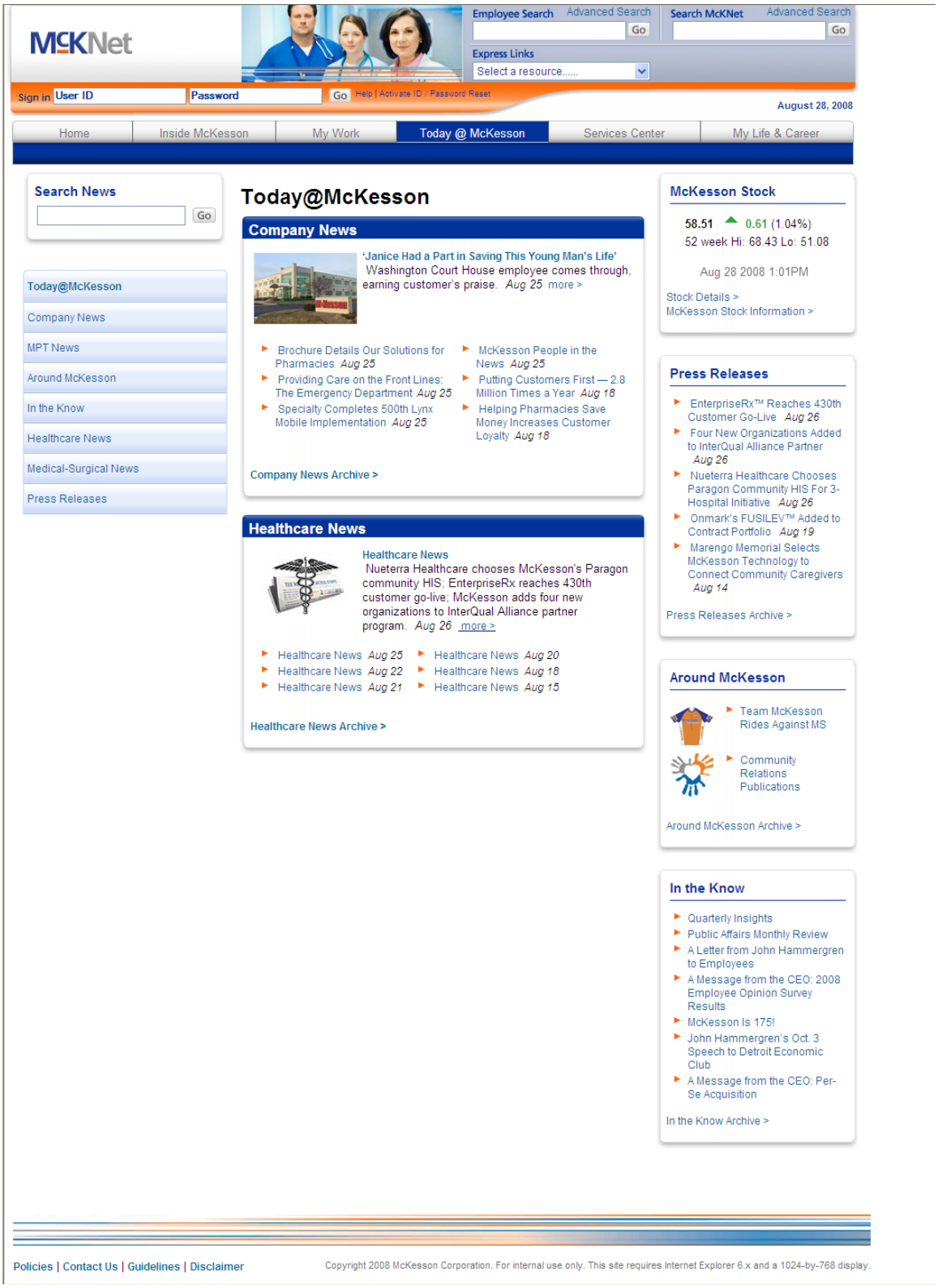
Pictured: A telecommunications spending report. This sample report from the *Expense View* shows a roll-up of all telecommunications expenses for a manager and his reports.

MPT sales portal. The *My Work* section is the sales portal's main landing page. The section offers users tabs for various kinds of information, including news, messages, reports, product information, forms, information about the sales process, and a calendar of events. "When I log onto the sales portal, everything is tailored to my role as a clinical solutions specialist," said Stefanie Abernethy, who is based in Phoenix, Arizona. "The portal has all of the information that I need to do my job. And because of the single-sign-on access, I don't have to remember a lot of different passwords. I can use the portal as one point of entry to get all of the information I need."

Another sales portal area, *Product Central*, contains information on all of the division's products. "Because I cover so many different products in my role as a clinical solutions specialist, I use *Product Central* a lot," said Abernethy. "I can usually find the information I need, and if I have specific questions, the names of the product managers are listed on the right side of every product page with their phone numbers and e-mail addresses."

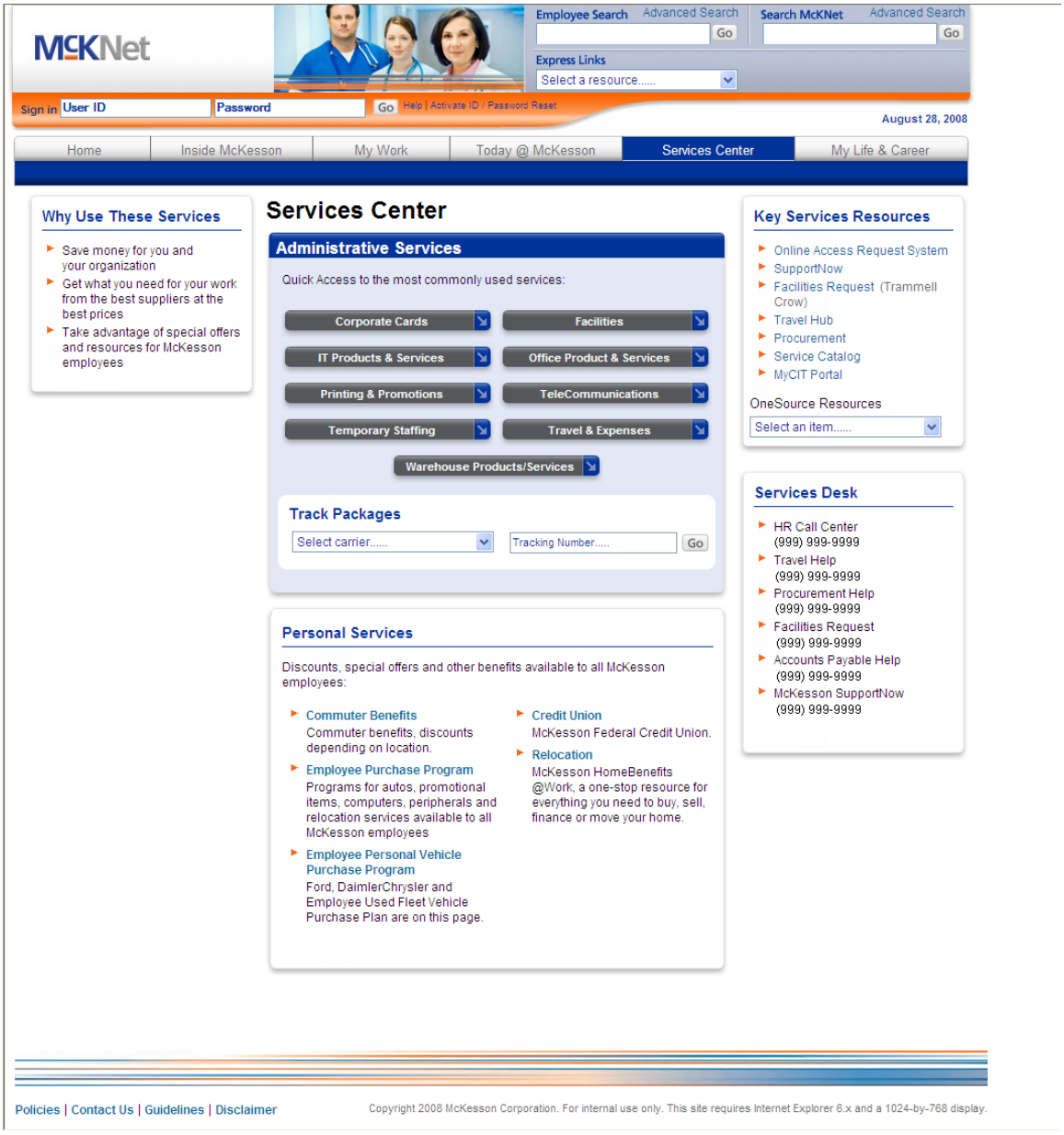
Today@McKesson. This news center offers up-to-date news—company-wide and personalizable by business unit and location—to ensure that employees are knowledgeable about the business overall and feel connected to their specific business unit.

10 Best Intranets: McKesson Corporation



Pictured: *Today@McKesson* features company news, industry news, and press releases all in one place.

Services Center. This section hosts centralized services that are personalized by location and give employees quick access to resources they need.



Pictured: The *Services Center*. This page offers access to a variety of administrative services, personal services, and links to enterprise applications for travel, procurement, and systems access request systems.

My Life & Career. Integrating HR tools, content, and support into one central location, this area is individually personalized, delivering information based on role (leader, manager, or employee) and personal data. Featured information supports the total value of employment, while new, process-related information helps guide employees through complex tasks. In addition, a new employee section makes sure new hires are well integrated into the organization.

Collaboration Tools

Web 2.0 Features

McKesson uses SharePoint technologies to enable wikis, blogs, file sharing, team sites, and integration of social media with the portal. These features benefit the site by enabling increased collaboration and soft knowledge management (with user-driven content). Unfortunately, the design of the SharePoint-based features is currently inconsistent with the portal UI.

“One persistent complaint and pain point around the SharePoint sites has been the unbranded look and different navigation paradigm,” says Thomsic. “Users shouldn’t have to think in terms of technologies and worry about where Vignette and SharePoint sites begin and end. They don’t care about what technology is behind the intranet, they just want to get their jobs done and find what they’re looking for.”

In an attempt to reconcile the discrepancy between the portal and the SharePoint technology, the McKesson team is initiating a project to integrate the design of SharePoint-based features with the design of the portal.

“Rather than build new applications, we are leveraging our investment in SharePoint and other technologies and exploring partnerships with companies that provide an integrated set of social software applications for information sharing and team collaboration. ConnectBeam, IBM, and NewsGator are companies we are considering.”

Using connecting technology to integrate the portal with SharePoint will be important for users because it will create a more cohesive user experience while also improving the searchability of portal content and content found within SharePoint sites. The plan is to display information in the same design and look and feel that they have tested and invested in.

“One of the benefits we’ve derived from the portal project, through governance at the executive and operational level, is the development of a coherent strategy for what uses to make of both the portal and SharePoint sites,” says Thomsic. “We now have clear guidelines for where the portal makes most sense, particularly for communicating across the company and integrating with corporate internal applications, and when SharePoint is appropriate, such as for sharing among local teams or controlling access to information.”

Creating a Sense of Community Online

For some companies, the “softer” aspects of online community—that is, the tools that connect users socially and create a sense of belonging within the company—are highly valued and an intrinsic part of the culture. For others, they are superfluous; merely the icing on a cake that are considered only after all the mission-critical features are up and running.

Stakeholders at McKesson are increasingly finding the value in creating stronger connection points between employees in the online environment.

"As we move into more and more situations where we’re allowing people to work at home, and they lose the day-to-day, face-to-face interaction, we also see through surveys that they tend to become more dissatisfied with that job after a year or so because of the lack of social contact," says Randy Spratt, McKesson CIO and executive sponsor of the employee portal. "The ones who stay in the job find ways to replace it with electronic social networking. So, to that end, we’re investing in collaboration tools, and bandwidth to be able to support video networking, and

network tools within our infrastructure that will allow people to communication more freely."

An advanced collaboration project is set to launch in March 2009 to augment the community and collaboration features the site currently offers. “We are realizing the difficulty of implementing social networking technologies in our environment, and that the portal is not a ‘magic bullet,’” says Thomsic. “It’s a veneer that requires hard work underneath to provide more convergent tools, processes, and so on.”

Thomsic has found this to be a huge and potentially systemic problem for the company because the businesses were turning to SharePoint as a cheap and fast way to enable collaboration. This seems like a good band-aid, but without guidance, she says, SharePoint produces “chaos and confusion.”

“Our objective is to evolve our platform with technologies that combine concepts of social bookmarking and tagging with those of social networking,” she says. “As a B2B enterprise organization, we still need security settings, workflows, and roles/relationships.”

LESSONS LEARNED

McKesson’s team members have learned a lot from the portal project, including lessons that have informed their work as they’ve enhanced the project beyond Release 1.

Tracey Thomsic, director of online marketing, outlines the most important lessons learned by her team so far.

Lessons from Release 1:

- **Build it and they will come.** “We did the right thing to enable the platform first, then allow groups to join as they were ready,” says Thomsic. “This culture would not have accepted a corporate-mandate or forced solution.
- **Evangelize.** “What we learned after Release 1 (May 2007) is that we have to invest heavily in evangelism and communication to move beyond a skunk-works model. “We learned that a launch communication strategy needs to be educational as much as evangelical; and it needs funding to be successful. Technology is cool and critical, but if people don’t understand how it works and how it helps them, they will never get over adoption hurdles.”
- **IT and communications departments must join forces.** “IT and Corporate Communications need to work together with a clear understanding that the business drives the requirements. Without a clear mandate from the business, new technology won’t be adopted and the investment in development will be wasted.
- **Governance, governance, governance.** “Good governance by a committed board of the right executives from each business has given us both power and steering: the authority and budget to accomplish the work and the clear direction on priorities. Governance has really enabled us to balance corporate interests with [business unit] autonomy. Governance is also key to adoption because people in the business units and functional groups will respond much more readily to evangelism from their own managers.
- **Think about metrics early and involve the IT team and business stakeholders.** “If IT doesn’t understand the importance of measurement, then the platform dependencies related to analytics issues—in our case,

WebTrends—will be ignored. This is another area where strong business leadership is critical."

- **Develop a strategic partnership with an agency that has a design philosophy and commitment to solving business problems.** "In our case, LDS helped us strategize the project and select the right group to focus on for our first release. We chose sales over HR for Release 1 because of the impact on the bottom line and the fact that the internal change management issues were less complex. LDS facilitated a formalized study of top 10 tasks creating the most problems across the company on the intranet, and then they did research to determine when/why people bail out and give up. From that data, we've developed KPIs."
- **Engage the brand team.** "Providing a standard footprint and consistent brand identity encourages adoption and puts a friendly face on the company. Even though we still have lot to do to integrate and converge the way we work around a single set of capabilities, the branded portal experience provides context and unity and people are less intimidated about using it."
- **Realize that you are not your target audience.** "It sounds obvious to Web professionals and designers, but we learned this after Release 1. We surveyed users for feedback on the new portal one week post-launch, and while much feedback was positive, we got some that was negative and definitely not encouraging. We moved their cheese and they let us know, but some of the latter has been the most helpful in determining our punch list for enhancements between major releases."

  "Just giving people the opportunity to engage and feel heard can make a difference."
- **MPT sales portal.** "As you are going through the designs, you also need to make sure some of your key content contributors are also involved, as they are the SMEs. The content work stream was started after the designs were reviewed for the sales portal. If our key content contributors had been involved up front, working through the designs with our Sales Advisory Board, the final designs may have been different. Now, we are starting to redesign a few areas that have been live for about 15 months to better balance the content available with the needs of the Sales team."

Lessons learned from the HR portal project:

- **Time matters.** "Six months is not enough time to redesign a portal."
- **Build it and they will come.** "For the initial launch of the HR portal, we didn't change a lot of content, but the new design has made content owners more interested in developing better content."
- **Make sure that the lines of decision-making are clear.** "There are many levels of stakeholders. Being clear about what is expected from each level keeps everyone on the same page and helps you stick to your timelines."
- **Hire a really good content manager.** "We did, and we were really lucky!"
- **Don't ignore analytics and site metrics in the planning phase.** If you do, "it will bite you later. The business will want to see numbers, and the executives love them. That saying about, 'you can't manage what you can't measure' is really true."

- **Get an executive sponsor who is engaged.** "McKesson's CIO, Randy Spratt, is a strong advocate and he's forward-thinking and understands the portal as a communication tool and every day work space."
- **Communicate business strategy with IT early and often.**
- **Listen to users.** "Invite feedback, and share it with the entire Web team. Encourage transparency in the team and respond with empathy to users when the feedback is negative."

RESULTS / ROI

Measuring User Satisfaction

In June 2008, Peridot conducted an online survey with Foresee Results to assess customer satisfaction on the employee portal. Through a proprietary methodology, the survey set out to identify the key attributes important to the portal's users, determine which site elements have the biggest impact on overall customer satisfaction, and generate a score based on an index of over 200 companies and government agencies.

The survey generated 1,425 completed responses—a 26.6 response right—from the period June 2–July 22, 2008. The overall customer satisfaction for the employee portal was 64 (out of 100). This result is considered on par with other intranets included in ForeSee's database.

Content was rated highest, with a score of 76. Navigation and tasks were rated slightly below average at 61. *Inside McKesson* and *Today@McKesson* received the highest satisfaction scores, while *My Life & Career* and *My Work* were the most-visited portal areas.

"The survey revealed some of the challenges that many enterprise portal teams have," says Thomsic. "Usage of the employee portal platform and other internal tools/sites that exist outside the portal are seamless to many survey respondents. The implication is that most respondents rate their level of satisfaction based on their overall online experience."

Though many of these online systems are not within the portal team's control, they nonetheless impact overall customer satisfaction. "The Corporate Web Team will focus on improvements to the site's look and feel and navigation in response to this survey," she says. The team will also continue to work with its internal partners to create a more integrated, user-centered experience to increase satisfaction levels.

Communication Wins

The company also experienced some big communication wins through the new portal:

- **Targeted communication.** Internal communications teams in various businesses can now target communications to specific audiences in a way that's meaningful, proactive, and relevant to employees' jobs and location. "The portal also enables communicators to manage and balance messaging among corporate and business unit groups, reducing duplicate or irrelevant information that employees used to see—or worse, that some didn't ever see because of outdated e-mail distribution lists," says Thomsic. "News, messages, announcements, job aids, tools, applications, and data are integrated across business units, delivered via the portal, and the design is attractive."

The team has found that click-through on company news articles is higher than prior to the redesign; this is validated by the success of headlines, which the team can now measure.

- **Engaging employees.** Thomsic says that one business unit HR team successfully used the portal to launch an employee engagement program for managers. "That has been tremendously successful," says Thomsic. "The team provided all of the communication and tools to a subset of managers for that business, and achieved a high completion rate for compliance with the program."
- **Increasing engagement.** "The ultimate measure of success will be increased engagement scores, which we can't measure yet," says Thomsic. "We'll have that information later this calendar year, when we have employee survey results. We can measure reach and tool usage, however, and those metrics show that using the portal ensured that all managers in the target audience saw and accessed the information."

Prior to the portal roll-out, Thomsic says this type of program would have been cost ineffective for this group. "It would have required substantial budget and time for the team to rollout, requiring reliance on e-mail, a third-party hosted site with a unique login, and a design that was different from anything else in the McKesson intranet environment, and was not integrated with any relevant corporate HR content."

Members of the MPT sales organization site the following as top benefits of the redesign:

- **SSO to sales applications.** SSO was implemented for *My McKesson HR*, *Travel Hub*, Siebel, Siebel Analytics, and Business Objects. Direct links to Siebel were implemented for *My Opportunities*, *My Team's Opportunities*, *My Quotes*, and *My Team's Quotes*.
- **Automated access to commissions statements via Business Objects.**
- **Internet Explorer access to product and marketing information, including presentations**. *Product Central* is a "one-stop shopping" area for product content. Each product and solution page follows the same format, and displays contacts, customer references, and internal and external tools. *Product Central* also includes content addressing customer business needs and roles. Sales personnel can also create a *My Product List* as a personalization feature.
- **Sales analytics report integration.** The *My Reports* page includes integrated Siebel Analytics and Business Objects reports. *My Reports* automatically displays personalized forecast, funnel, closed win, and commission statement data. The *My Favorite Reports* personalization feature lets sales personnel pick their top three reports.
- **Reduction in e-mail volume.** The *Message Center* serves as a repository of messages. All national and regional sales messages can be stored centrally, with archiving. The *Message Center* also manages product, event, marketing, education, and commissions messages in one central location.

Management Wins

From a management perspective, the portal has already begun to make a difference across the organization. Measuring user satisfaction is important in gauging an intranet's success, but management often has its own litmus for a site's success. At the enterprise level, SSO has been identified as the portal's biggest overall benefit and is "by far considered the most useful feature launched," says Anand Srinivasan, development manager. "Also, offering a personalized view of content and functionality for business units and corporate functions is very high value."

Managers from the three main business areas explain what they consider to be the portal's biggest positive impact.

Corporate Communications: Aggregation

The big win here was corralling the disparate intranet presences of the different business units and functional groups within the company into a single interface managed through one publishing platform. This was the foundation that enabled the company to offer all the benefits of targeted and integrated communication, SSO, and access to applications.

CIT: Single Sign-On

Providing SSO was the big win for CIT, which had a capable team in place to deliver the executives demands.

HR Portal: Subtle Differences Make a Big Impact

Renaming and splitting a single top-level navigation tab from *HR* to become *My Team* and *My Life and Career* were important wins for the HR portal.

Recommendations for the Intranet Design Process

Understanding the lessons learned from these great intranets will help you design a better intranet for your organization or your client's organization. You can also make other, more process-related moves to improve intranet usability. Based on the above cases, the 2001–2008 winners, and our other experiences testing intranets, we offer a few of the most important recommendations for designing a usable intranet. Note that these recommendations have changed very little in the last few years.

WATCH PEOPLE WORK

When designing intranets, don't forget that you already know who the end users are. They're the people you pass in the hallways, the employees sitting next to you in the cafeteria, and the staff members who park next to you in the garage. Use these interactions to your advantage and get yourself invited to watch how your colleagues work. See how they're using and not using the intranet, and where design opportunities exist for making the intranet a more useful part of their day-to-day jobs.

CONDUCT USABILITY EVALUATIONS

Remember that you don't need a complete, finished design to garner useful usability feedback. In fact, it's better to get early feedback on incomplete designs. Just test with prototypes and paper mockups. Or, if you want to introduce design elements similar to those you see on a particular website, then use that website to test the features. You can watch people using any current system, even if it's not an intranet per se, to determine which features are already well designed.

Looking through all of this year's design submissions, we once again observed a lack of consistently applied usability processes. In particular, many companies skimped on regular usability testing, heuristic evaluations, and field studies. Yet even the busiest development teams, or those with the craziest deadlines, should take time to watch people attempt basic tasks using the design. It doesn't take long to do a quick test. We also encourage design teams to get a group of designers and developers together—even for just 20 minutes—to review a site's design, and then to identify, discuss, and agree on the top usability issues.

PERSONALIZE AFTER YOU CREATE THE INFRASTRUCTURE

Personalizing the intranet can help people find what they want and expedite work. Hiding things users don't need can also have positive effects by eliminating clutter and overload. However, personalizing is about more than designing the interface; it also involves designing systems for collecting and tracking timely information about users. This process typically involves HR and other departments and sometimes many databases as well. In short, it can be a lot of work.

We suggest all intranets ultimately strive to give each user an effective, personal experience. But don't get ahead of yourself and try to do this before the backend infrastructure is in place.

HELP CONTENT CONTRIBUTORS SUCCEED

The most well-received intranets are those with fresh information that people need and want. One way to keep information updated and interesting is to provide

methods for employees to add and edit information. Letting users—or designated content providers—contribute content gives them a stake in the intranet's success. Such efforts invariably produce compounded returns: fostering excellent content providers results in better content, which invariably leads to an intranet with more varied and useful information, which drives more employees to visit the intranet more often, and thus ensures that the intranet remains a business-critical tool.

CONSIDER ACCESSIBILITY

Many companies employ—or will at some point hire—people who use assistive technology. Yet almost all of the intranets submitted for consideration this year posed accessibility problems for users with low vision, no vision, or motor-skill challenges. The chief accessibility offenders: using too many graphics, tiny text, poor contrast, limited space between links and text, and small targets. Unfortunately, at many sites, introducing these exact features seems to be a new trend. On the positive side, while many submissions do overuse graphics, many others use graphics sparingly, and when they do use them, they are well labeled for users with low vision or no vision.

MEASURE ROI

Most of the winning intranets made obvious strides, fostering great usability improvements and no doubt creating productivity and efficiency gains for their companies. Yet few intranet teams formally (or even informally) measured any ROI. Often, such measurements are not a priority because of tight schedules and the way in which organizations allocate money. For example, the money to design and maintain the intranet might be allocated to the vice president of IT, while the actual productivity gains are found in the HR department.

Regardless, it's important that teams pause to measure the time users require to accomplish a task, both before and after a redesign. Take this decreased task time and factor the resulting financial savings across your organization. Then, make the gains known to the different departments involved and also at higher levels, so that even the most upper-level managers understand the importance of well-designed internal systems.

Intranets Not Selected: Common Issues

Each year that we conduct the *Intranet Design Annual* it gets more and more difficult to choose only 10 winners; we inevitably find more than 10 truly excellent designs. Still, there are some designs that seem to be stuck in the early 1990s. While we won't name or show examples from intranets that didn't make this year's top 10, the following are some of the problems we saw across submissions that are not among the winners and that are not included in this report.

POOR INFORMATION ARCHITECTURE

Piecing together many different intranets is not easy. And you can really tell when intranet designers were simply at a loss—for time, resources, energy… whatever. Regardless of the cause, the result is an incredibly complicated IA.

Some are overly cluttered. With others, the designers attempt to hide many of the choices until the user needs them. In theory, this is a very good idea. But the resulting design—which inevitably includes several levels of cascading menus—is detrimental. Offering inconsistent or unapparent indications of what is selected doesn't help users acclimate, navigate, or learn. Even breadcrumbs don't help in these cases.

Some designs are teetering on the edge of being okay, but are not scalable—and once a new group forms, the design's good qualities will likely fall off the cliff.

Other designs are created based on the corporate organization chart, making tasks and specifics hard to find. After all, not every user knows what every group is responsible for.

Often, menus will simply grow to unmanageable lengths, and in some cases stretch across several columns.

Occasionally, the main global navigation appears a bit shy—or maybe just in need of a vacation—and completely disappears from the user interface.

SEARCH ISSUES

Although scoped search is less prevalent than it used to be**,** a few organizations still search in only the selected area of the intranet. Users typically don't understand this. Today especially, users expect search to work well and to work like it does on most websites.

Also, search engine results pages (SERPs) are sometimes far too complicated. Some SERPs don't repeat the user's query—and that's the least of their issues. SERPs sometimes offer results that are utterly unusable, with *Untitled* after *Untitled* document in the list. Some even have *untitled* as both the doc title and the description.

OVERUSE OF UNIMAGINATIVE IMAGES

Why use stock art on an intranet? It can be cold and impersonal even on public-facing websites. But on an intranet… brrrrr. Some organizations slapped countless stock art images throughout the intranet. The attempt to make it visually interesting and maybe fun is a good idea, but the smiling models didn't meet the need.

It might not always be feasible, but if possible, follow the lead of many of our winning designs and use images from your actual organization.

INAPPROPIATE BRANDING

Designers often overuse or overthink the names of their links and features. For example, if there's a section to post comments, some designers seem to think it's too boring or nondescript to call it, *Post Comments.* Instead, they seem to think that branding the area or assigning it a catchy name is a better idea. It's not. Not at all. *Writing Wizard*, *Adding Area*, and *Collaboration Corner* are not helpful names. If you need these kinds of names to create hype or to keep yourself and your design team amused, fine. But such terms shouldn't make their way into the actual design that users see. Keep it simple.

In some cases, teams have to connect many sub-intranets—each with their own branding—through the main intranet. This doesn't make the organization seem very unified, and proximity makes the varying designs appear even more at odds.

NEW WINDOWS

Some intranets still open a new browser window every time a link is clicked, thus breaking the *Back* button and disorienting users. In a word, don't do this.

Selection Criteria and Process

This year marks the ninth annual Nielsen Norman Group intranet usability competition, which seeks the best examples of intranets that are easy to use and meet users' needs. In July 2008, we posted the call for submissions on http://www.useit.com. In response, we received submissions from organizations of different sizes and from various countries and industries. These submissions included intranet screenshots, explicit descriptions of the intranet's design and how it works, notes about the design process (including usability methods employed), detailed information about users and potential users, and the intranet's goals.

To judge the entries, we followed a four-step process: 1) initial design reviews and numeric rankings; 2) follow-up questions with the top submissions (when necessary); 3) design sorting, followed by thorough design reviews to choose the top 10; and 4) follow-up interviews with the top 10.

INITIAL DESIGN REVIEWS AND NUMERIC RANKINGS

Based on the initial submission information, the three judges (see *About the Authors*) conducted simple design reviews and whittled down the entries to the tier-one submissions. In addition to written commentary, we rated each site numerically. We based these ratings on criteria typically viewed as key to intranet usability, including some criteria that emerged from submissions and trends in our previous contests. We rated the following criteria in each submission on a 0 to 3 scale (with 3 being the best rating):

Navigation:

- Main navigation on every page
- Consistent/easy navigation
- Consistent style across the intranet
- No horizontal scrolling
- Minimal vertical scrolling

Design:

- Pleasing aesthetics
- Engaging homepage design
- Good contrast between text and background
- Easy-to-read text
- Easy-to-read links
- Good use of graphics
- The right amount of text
- The right number of links
- Clean design

Search:

- Consistently available search

- Relationship to employee search
- Good search design (ideally, a simple open field at the top of pages)

Personalization and News Delivery:

- Personalization/catering to different offices or cultures
- Organization-related news
- Information about internal groups

Content:

- Well-written text
- Employee directory or directory search
- Content posting and editing capabilities
- Meeting business needs

Overall:

- Simple forms
- Support for the main corporate functions
- Encapsulation of the organization's spirit
- Use of innovative, fun, or original features
- Accessibility features
- Originality or something special

FOLLOW-UP QUESTIONS WITH TOP TIER (WHEN NECESSARY)

After collecting this extensive information from site designers, along with information about their users, goals, and internal usability evaluations, we thoroughly reviewed the intranet designs. We evaluated them based on usability, look and feel, and elegance. We also considered the target users, their tasks, and how well the site's applications might help them complete these tasks. We didn't conduct usability evaluations with test participants, but we do believe that intranet usability studies reveal what works and doesn't work about designs. And we've completed some large-scale intranet usability research studies accordingly.[5]

DESIGN SORTING AND THOROUGH DESIGN REVIEW

Next, we reviewed the intranets and sorted the top 25 designs based on numeric ratings. We then conducted more thorough design reviews of the top 25 sites, and from this selected the 10 best intranets.

FOLLOW-UP INTERVIEWS WITH TOP 10

After choosing the top 10 submissions, we asked the site designers general and specific questions about the site and their design decisions, usability evaluation methods, and lessons learned. We then followed up with more specific questions—

[5] *Intranet Usability Guidelines*, *2nd Edition*, 10 reports covering intranet usability are available for purchase at http://www.nngroup.com/reports/intranet/guidelines/.

some exclusive to their intranet, and some more generic. For example, the generic questions included:

- What was the business reason for setting up the intranet?
- What does it do and what kind of information does it contain?
- Who had the idea for the intranet (or the revision), and what goals did he or she want to achieve?
- What were the constraints? (For example: Were there time or budget constraints? Did content have to be published in multiple languages?)
- Describe the development process and usability findings.
- Who was involved in the project and what were their roles in the organization? Describe the intranet team.

About the Authors

Kara Pernice is the managing director at Nielsen Norman Group and heads the company's East Coast operations. Since joining NN/g, Pernice has led several intercontinental research studies and wrote associated reports about topics such as intranets, the Web and accessibility, senior citizens, public relations, and site maps. She has developed and taught numerous seminars about these topics and about a variety of usability methods, such as the product life cycle, field studies, emotion and design, usability testing, and eyetracking. She is coauthor of the definitive book on eyetracking for websites, *Eyetracking Web Usability* (2009). Additionally, Pernice has worked with clients in many industries. Before joining NN/g, she established successful usability programs at Lotus Development; Iris Associates, an IBM subsidiary; and Interleaf. She managed the first usability program for Lotus Notes and the Domino server, and after her team's work, *PC Magazine* wrote, "If this were summer camp, Lotus Notes would walk away with the Most Improved Camper award." Pernice chaired the Usability Professionals' Association conferences in 2000 and 2001, was presentations chair for UPA 1999, and was conference advisor for UPA 2002. She is on the editorial board for a new intranet magazine, *The Journal of Intranet Strategy and Management*. She has an MBA from Northeastern University and a BA from Simmons College.

Patty Caya (www.pattycaya.com) is a multi-platform journalist, editor, and award-winning digital media producer. In her business writing, she specializes in topics relating to usability, social media, and the business and technology of the Web. For over a decade, she has split her time between journalism projects and Web consulting. She has consulted for many of Boston's top interactive agencies, leading Web and intranet development projects as well as usability testing, research, and design initiatives. Her client roster spans a wide range of industries and includes leading national brands alongside mission-driven non-profits. She has a BFA from New York University's Tisch School of the Arts and has pursued advanced coursework in the Information Design Program at Bentley College.

Dr. Jakob Nielsen (www.useit.com) is a principal of Nielsen Norman Group. He is the founder of the "discount usability engineering" movement, which emphasizes fast and efficient methods for improving the quality of user interfaces. Nielsen, noted as "the world's leading expert on Web usability" by *U.S. News and World Report* and "the next best thing to a true time machine" by *USA Today*, is the author of the best-selling book *Designing Web Usability: The Practice of Simplicity* (2000), which has sold more than a quarter of a million copies in 22 languages. His other books include *Hypertext and Hypermedia (1990), Usability Engineering* (1993), *Usability Inspection Methods* (1994), *International User Interfaces* (1996), *Homepage Usability: 50 Websites Deconstructed* (2001), *Prioritizing Web Usability* (2006), and *Eyetracking Web Usability* (2009). Nielsen's Alertbox column on Web usability has been published on the Internet since 1995 and currently has about 200,000 readers. From 1994 to 1998, Nielsen was a Sun Microsystems Distinguished Engineer. His previous affiliations include Bell Communications Research, the Technical University of Denmark, and the IBM User Interface Institute. He holds 79 US patents, mainly on ways of making the Internet easier to use.

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