Intranet Design Annual 2018

The Year's 10 Best Intranets

Kara Pernice, Amy Schade, and Patty Caya

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WWW.NNGROUP.COM | 48105 WARM SPRINGS BLVD., FREMONT CA 94539–7498 USA

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REPORT AUTHORS



Kara Pernice, Amy Schade, Patty Caya

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Contents

Executive Summary

ORGANIZATIONS

Following are the organizations with the 10 best-designed intranets for 2018:

- **American Medical Association** (US), a national organization providing resources for physicians, residents, and medical students
- **Archer Malmo** (US), one of the largest independently owned full-service advertising agencies in the United States
- **Capital Power** (Canada), a North American power producer
- **Delta Air Lines** (US), one of the world's largest global airlines
- **eBay, Inc.** (US), a multinational commerce company operating through its Marketplace, StubHub, and Classifieds platforms to connect millions of sellers with more than 169 million active buyers around the world
- **GSK** (UK), a science-led company that researches, develops, and manufactures innovative pharmaceutical medicines, vaccines, and consumer healthcare products
- **Maple Leaf Foods Inc.** (Canada), a food manufacturer
- **PKP Energetyka S.A.** (Poland), an energy company
- **Travelers Insurance** (US), one of the oldest insurance organizations in the United States
- **UN World Food Programme** (Italy), a leading humanitarian organization fighting hunger and working toward the global goal of ending hunger by 2030

NORTH AMERICA STILL COMMANDING

Of the 10 winning teams, seven hail from North America, with five from the US and two from Canada. We have one winner from the UK. This year, Poland makes a showing for the second time in our winning set, while Italy makes its third showing.

NONPROFITS AND UTILITIES ARE STRONG THIS YEAR

Since our first Intranet Design Annual in 2001, 10 nonprofits have been among the winners, and two of those are from this year. Might this represent an upturn in intranet budget and perceived importance of intranets at nonprofit organizations?

Utilities remain the most winning industry, with 28, or 16% of winners since the start of this contest. This year, two utilities make our list. Technology and finance remain among the strongest industries, and each has two winners this year.

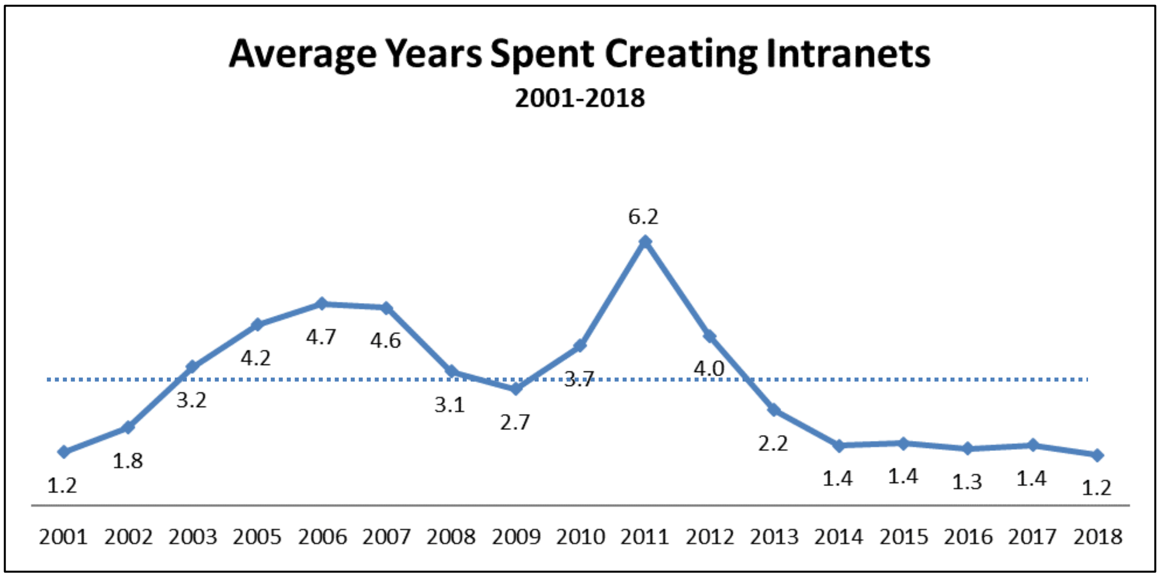
While we place eBay under the technology industry umbrella, it is the first ecommerce organization to win.

SPEEDY DEVELOPMENT

Intranet development timelines are getting shorter. This year's average of 14 months (or 1.2 years) is the shortest yet for our Intranet Design Annual winners. Since 2014, the average intranet project has taken 16.1 months, or 1.3 years; in contrast, the average from 2001 to the present is 33.6 months, or 2.8 years.

Today's intranet projects often involve iterative development, which makes it hard to calculate project time as sites are in a state of constant improvement.

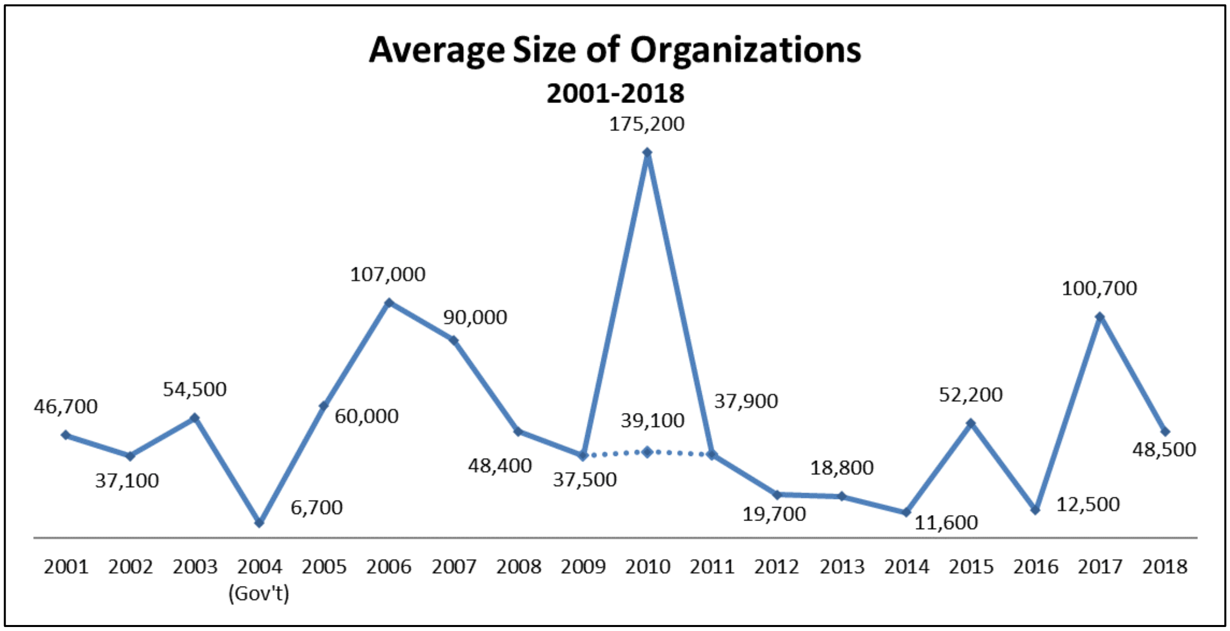
Faster development strategies, such as Agile, contribute to shorter times, as do continually improving website development tools. For example, two of this year's winners used intranet-in-a-box solutions that were quickly deployed in 7 and 10 months, respectively.



Average Years Spent Creating Intranets: 2001–2018. Teams created this year's winning sites in an average of 14 months (1.2 years). This continues the trend that began in 2014, with winning intranets taking less than 1.5 years on average to be created. In contrast, from 2001 to 2013, winning intranet teams took an average of 33.6 months, or just under 3 years, to complete their redesigns.

SMALLER WINNING ORGANIZATIONS

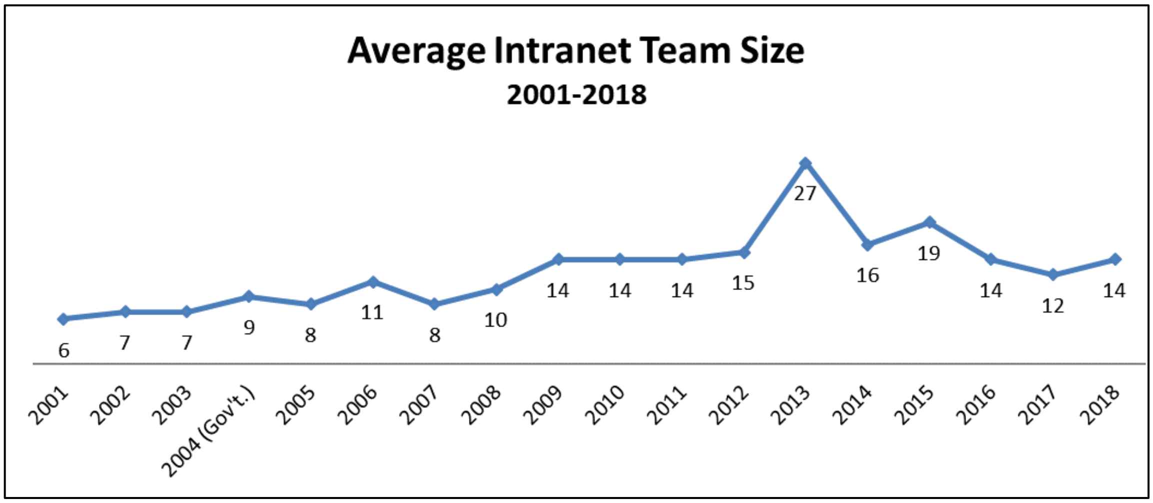
The median company size of this year's winners was 13,000 employees, with four of our winning organizations supporting 1,000 employees or less. On average, winning teams supported 48,500 employees, ranging from 206 supported employees at Archer Malmo to 260,000 at Delta Air Lines.



Average Organization Size: 2001–2018. The winning 2018 sites supported an average of 48,500 employees, ranging from 206 employees at Archer Malmo to 260,000 at Delta Air Lines. This year's median was 13,000 employees. (The high average in 2010 was due to winning organization Walmart's size, with an intranet supporting 1.4 million store associates. Excluding Walmart, the average for that year was 39,100.)

FOURTEEN CORE TEAM MEMBERS

The average winning intranet team comprised 14 core members. Teams sizes ranged from three at Capital Power to 22 at both American Medical Association and eBay. Three teams — Capital Power, Travelers Insurance, and the United Nations World Food Programme — had teams of seven or fewer people. These numbers reflect the core intranet teams, as opposed to extended teams, which might include content authors or short-term project members. Core teams comprised internal and external staff and full- or part-time employees.



Average Intranet Team Size: 2001–2018. In 2018, the average team size was 14 members.

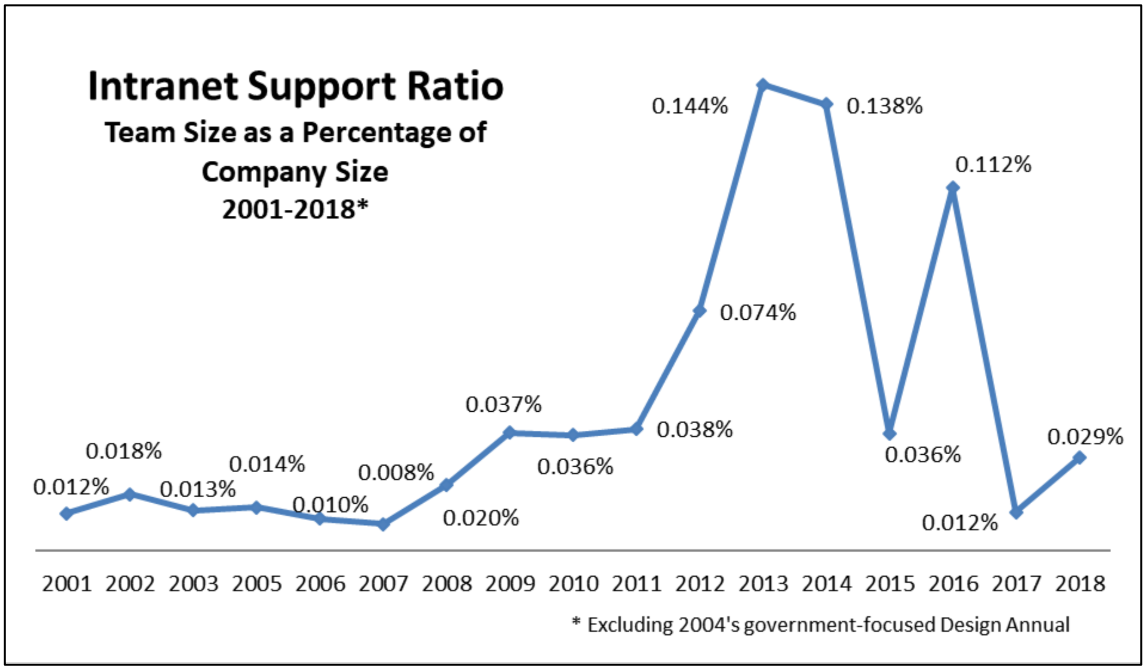
Although this year's winning organizations supported a small average number of employees, it is encouraging to see a slight increase in the average team size compared to previous years' data. However, these teams are still relatively small. Given the intranet's importance — both for communicating internally and completing daily work — intranet teams should be generously staffed.

Relatively small team sizes can be the result of faster implementation and stronger intranet creation tools. Still, it is essential that teams receive the staff, funding, and management support they need to do the important work of creating a usable, effective intranet. Also, these team numbers reflect the number of employees working on the *intranet redesign*; often, even fewer employees remain dedicated to intranet maintenance, governance, and iterative development after the major redesign effort is complete.

TEAM SIZE RELATIVE TO THE NUMBER OF EMPLOYEES THE INTRANET SUPPORTS

We also consider team size relative to organization size for these winning designs. Intranet teams are special in that a small number of people can have a huge impact on everyone at the organization. For example, the American Medical Association team had 22 people supporting 1,000 users, while the eBay team also had 22 people, but supported 20 times more users (21,000).

As a percentage, this year's teams comprised 0.029% of company size. That is, for every 10,000 employees, 2.9 worked on the intranet team.



Team Size as a Percentage of Company Size: 2001–2018. This year's winning intranet teams comprised 0.029% of the people they support.

To further explore the relationship between organization and team sizes, we compared team size to company size over the past 10 Intranet Design Annuals. We found that our winning intranets have a similar *intranet support ratio*, or percentage of employees who work on the intranet team.

The rather complex formula below summarizes the relationship between team size and organization size for winning Intranet Design Annual teams. The intranet support ratio formula is:

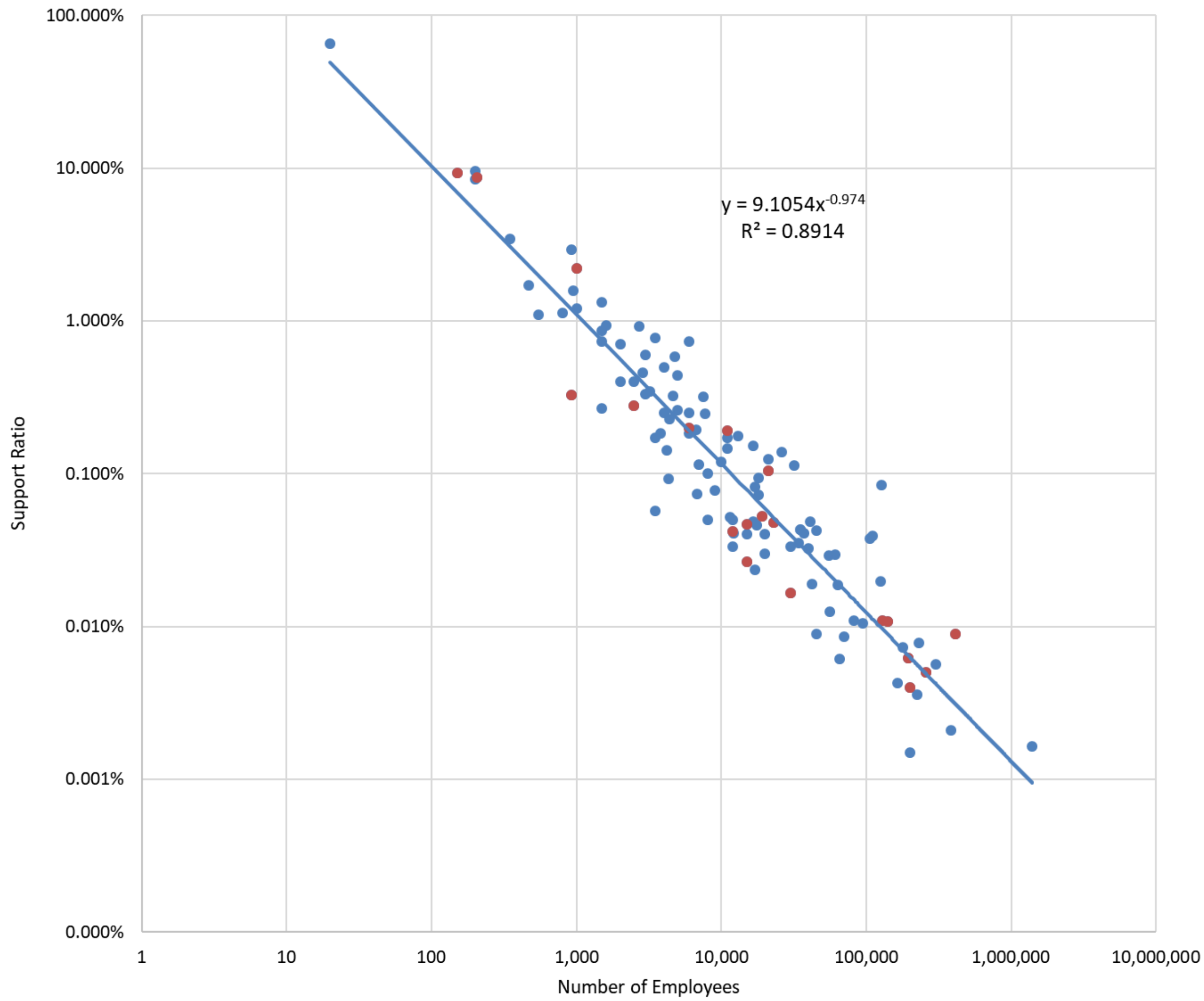
Intranet support ratio = 9.0154 * number of employees$^{-0.974}$

That is, you take the number of employees the intranet supports and raise it to the power of -0.974. You then multiply the resulting number by 9.0154 to get the expected intranet support ratio. This ratio, multiplied by the number of employees, results in a team size. (The equation explains 89% of the variability in intranet support ratios.)

As complex at this equation is, in practice, it breaks down simply to team sizes of 10–13 people as follows:

Number of employees at winning organizations	Size of winning intranet team
100	10.2
1,000	10.8

10,000	11.5
100,000	12.2
500,000	12.7



The *intranet support ratio* equation explains 89% of the variability in intranet support ratios. This effect is visible in the chart, which plots the numbers on a double logarithmic scale.

We are not recommending that intranet teams have 10 to 12 people. In fact, this year's winners had 14 team members, on average. Teams may need many more (or in rare cases, fewer) people depending on the circumstances. These numbers are simply a suggested minimum team size.

BRINGING IN OUTSIDE HELP

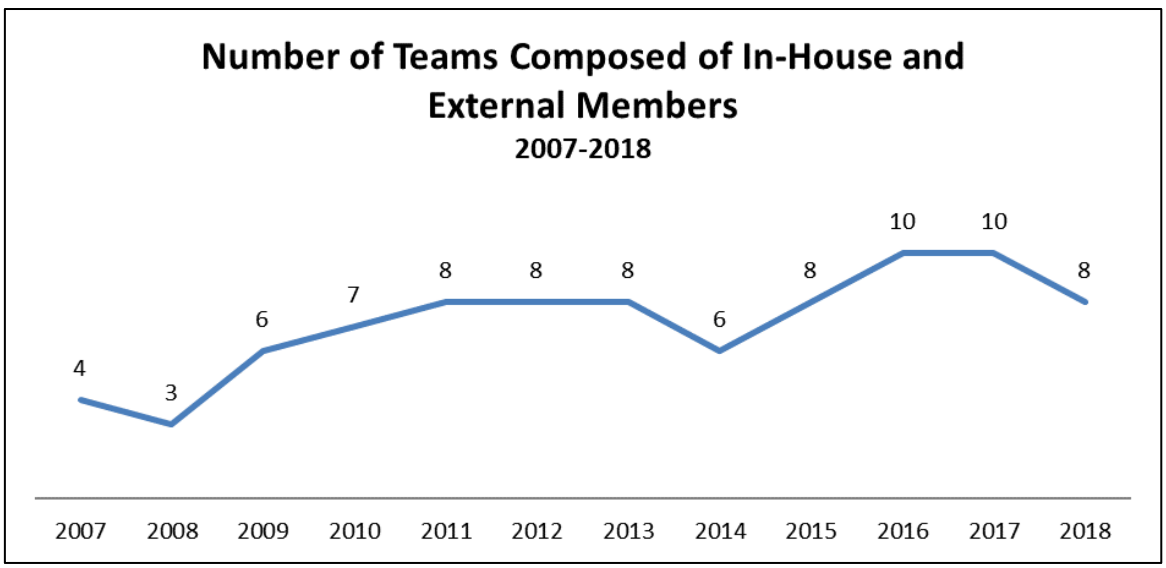
Eight of this year's winning organizations looked to outside agencies and consultants to help with the intranet redesign, bringing in an average of two agencies each.

Key areas in which teams sought help included:

- Content creation and editor training
- Development
- Discovery
- Ideation
- Information architecture
- Persona creation
- Project management
- Prototyping
- User research
- Visual design
- Wireframes

Over the years, many winning intranet teams have engaged external resources to help in their redesign projects, both to fill internal team gaps and gain outside experience and perspective.

Reliance on outside resources is a double-edged sword, however. Many winning organizations have quick development times and iterative practices, which raises a crucial question: *When these short-term external resources leave, who is left to iterate, maintain, and continually improve the new site?*



Number of Teams Composed of In-House and External Members: 2007–2018. This year, 8 of 10 winning organizations used outside resources in their intranet redesign project.

More details on the collaboration between in-house teams and outside firms can be found in each company's individual profile.

Overview of the Winners

THE 10 WINNERS *IN ALPHABETICAL ORDER*	
American Medical Association (Association; US)	AMA's team took 27,000 pages of content and edited it down to 120 streamlined pages, while also transitioning the organization to a more collaborative and technology-savvy solution, enabling greater efficiencies and connections within the organization.
Archer Malmo (Advertising; US)	Providing wikis and useful forms, encouraging suggestions for social channels, and making information easy for everyone to find epitomizes the democratic culture that Archer Malmo designers aimed for in their intranet. Pair these helpful knowledge-sharing features with a cheeky tone of voice and an attractive graphic design, and we have a winner!
Capital Power (Energy; Canada)	Using the Bonzai intranet platform, Capital Power's three-person intranet team was able to create a responsive site, rewrite and reorganize intranet content, and put a new governance structure in place for intranet sustainability — all while coming in under budget.
Delta Air Lines (Transportation; US)	Delta took a (literally) broken intranet and turned it into an opportunity to create a streamlined site with engaging content, clean design, and easy-to-use interfaces.
eBay, Inc. (E-Commerce; US)	A fresh start. A fresh look. Code that's clean and new. eBay's intranet delivers news, benefits, push notifications, and robust search capabilities — and also offers ways for employees to spread kindness and good vibes around the organization.
GSK (Pharmaceutical; UK)	Determined to convert wildly varied intranet interfaces into a single consistent one, GSK intranet team members researched and designed until they derived supportive tools that all of the site's publishers can use effectively. Consistency, communication, and collaboration are this winning intranet's trifecta.
Maple Leaf Foods (Food Manufacturer; Canada)	The Maple Leaf Foods intranet team used targeted customization of Office 365 to create a visually distinct, comprehensive site that supports communication, collaboration, and productivity.
PKP Energetyka S.A. (Energy; Poland)	Using an Elastic Cloud Solutions intranet-in-a-box tool, the PKP Energetyka team created an attractive, engaging, and easy-to-use site, rolling it out in a series of releases so it could incorporate further user feedback.
Travelers Insurance (Insurance/Financial; US)	A modest but modern design gently ushers Travelers employees through their day-to-day work. News, tools, personalization, customization, and everything searchable

	are just a few ways that the site informs employees and elevates their productivity.
UN World Food Programme (Nonprofit; Italy)	With brains, beauty, and the propensity to consolidate similar content and make helpful suggestions, the WFP intranet nourishes and satisfies the employees it serves.

COMPANIES AT A GLANCE

Company	Headquarters	Industry	# of Employees	Intranet Team Size
American Medical Association	US	Nonprofit	1,000	12
Archer Malmo	US	Advertising	206	18
Capital Power	Canada	Power generation	719 employees 200 contractors	3
eBay, Inc.	US	E-commerce	14,000 employees 7,000 contractors	~30
Delta Air Lines	US	Aviation	80,000	13 (6 in Corporate Communications and 7 in IT)
GSK	United Kingdom	Pharmaceutical, consumer healthcare	140,000 employees and contingent workers	15 (plus several others in adjunct roles)
Maple Leaf Foods	Canada	Food manufacturer	>11,000	9 (plus 12 supplemental contract resources[1])
PKP Energetyka S.A.	Poland	Energy	6,000	12 (7 internal, 5 external)
Travelers Insurance	US	Insurance	30,000	5
UN World Food Programme	Italy	Nonprofit	14,000	7 (3 internal, 4 external)

[1] The 12 supplemental contract resources were secured to complete key project activities, including expedition of development efforts with the help of a second off-shore scrum team.

INTRANETS AT A GLANCE				
Company	**Intranet Platform**	**Language(s)**	**Mobile Approach**	**Agile Development**
American Medical Association	SharePoint Office 365, SharePoint Online	English	Responsive web design, mobile accessible	Yes
Archer Malmo	WordPress	English	Responsive web design	No
Capital Power	Office 365/ Bonzai Intranet	English	Responsive web design	Yes
eBay, Inc.	Custom (MEAN Stack)	English	Responsive web design, native app	Yes
Delta Air Lines	SharePoint Online	English	Responsive web design	Yes
GSK	SharePoint 2013	13 languages for site provisioning; some content can be translated into any language	Secure mobile access through AirWatch; some content available via a standard mobile browser	Yes
Maple Leaf Foods	SharePoint O365 Online	English	Responsive web design	Yes
PKP Energetyka S.A.	SharePoint 2013	Polish	Responsive web design	Yes
Travelers Insurance	DCM Opentext CMS and .NET application	English; French (Canada)	Responsive web design	Yes
UN World Food Programme	Drupal 8	English	Responsive web design	Yes

Common Themes Among the Winners

If you aspire to design like the greats, consider this year's trends for your own intranet project.

THINK SIMPLE

Simplification is the overarching theme for this year's winning intranets. These teams have mastered the skill of ignoring the unnecessary and focusing on goals and needs. They simplified their processes, content, and tools to produce their great designs. Their efforts were not without challenges, however; this year's advanced teams faced many similar tests, and in several cases arrived at comparable conclusions. We describe those challenges and solutions here.

OFFER A DESIGN (TEMPLATE) ANYONE CAN WORK WITH

When it comes to intranet design, every organization has an inherent — though often unrecognized and unmet — need: all individual employees and teams need to create pages that let them share information with one another. When this isn't possible or easy on the corporate intranet, teams look elsewhere, including to tools outside the intranet, siloed collaborative or team spaces, or (in a total rogue move) to a separate intranet they design themselves.

Ever since intranets first emerged, there have been patched-together solutions that compete with them. This makes perfect sense for teams lacking an easy outlet in which to communicate, but it doesn't make it desirable. In fact, many issues arise when employees can't create pages on the intranet, including the following:

- Siloed team spaces and separate intranets might work as a short-term solution, but their content often goes stale quickly.
- To be useful, intranet content should be centrally managed and accessible via the global navigation and search; this is typically not possible for content on one-off intranets and other solutions.
- When intranet sections are not well managed, their content is often outdated or duplicated, making it difficult for employees to know which information is accurate and which source to trust.
- Consistent design across the intranet offers great benefits. When canned team spaces or separate intranets fail to match the main intranet's design, employees must acclimate, wasting time while they scour menus and pages to find what they need to get work done.

In short, silos are a huge problem on intranets.

The fix? Make it possible for anyone at the organization to create pages that are both part of the intranet (instead of an offshoot of it) and part of the taxonomy, tagging, IA, and search. Today's best intranet teams achieve this.

For example, the GSK intranet team started by reviewing thousands of the existing intranet pages. The layout patterns that emerged inspired the "brand template tool." This tool lets employees easily create their own brand-compliant, design-consistent pages without needing technical skills or web expertise. But, as a safeguard, the intranet team added training, including a wall feed where people can ask and answer questions. The tool's success has been enormous, and it is in use with more than 2,000 sites. It is also estimated to have saved GSK millions of dollars that would have otherwise been spent on design agency work.

Similarly, PKP Energetyka offers a "Block Editor" with more than 100 ready-made page elements (including text, images, and links) that follow the same style guide. Thus, people without technical experience can quickly create content by dragging and dropping items on a page.

At eBay, employees often created WordPress sites using generic themes. The intranet team thus created *Site Builder*, which lets all employees create and manage their own sites using predefined components, including headers, accordions, feeds, and calendars. The many sites created with Site Builder are now part of the intranet. They have a consistent design, are centrally managed, and are indexed through the intranet's search engine. They are also hooked into the analytics platform so the team can study their usage.

THE CLOUD IS MOVING IN

Intranet teams are using the cloud more than in years past due to key cloud incentives, including

- system auto-updates,
- the elimination of physical servers and drives,
- security,
- data accessibility from any location, and
- fast response times.

Teams such as Delta and American Medical Association (AMA) reported that SharePoint Online's automatic functionality updates were a convincing factor in choosing that cloud-based solution.

Eliminating physical servers and shared drives, and housing internal data in a secure place are other reasons teams such as Maple Leaf and PKP Energetyka chose SharePoint Online.

Response time might seem like a surprising reason for choosing a cloud solution, but speed was a factor that eBay cited for choosing Azure Cloud on MEAN stack, which offers eBay employees around the world faster intranet response times than the previous intranet.

LONGEVITY FIRST — THEN CUSTOMIZATION

In theory, auto updates are the utmost convenience feature, but intranet teams have been hesitant to adopt them. The main concern is that auto updates will break any of the team's customizations aimed at transforming the intranet into the best possible solution. For example, while Maple Leaf appreciates that its intranet will always be up-to-date — and require no management updates — the team is also aware that the auto-update bonus may pose challenges later for its customized intranet features.

Customizing an out-of-box intranet solution is a double-edged sword. On one side, customization can make an intranet like a bespoke suit that fits exquisitely. But, as when a person diets and loses 15 pounds, upgrades and auto-updates can make that suit ill-fitting and in desperate need of tailoring. Upgrades and auto-updates can break customized intranets.

All winning teams discussed the benefits and drawbacks of customizing the design, whether building an intranet from the ground up or simply making special tweaks to SharePoint Online. Teams who choose SharePoint seem to ponder the customization question hardest; two such teams — Delta and Capital Power — ultimately decided to avoid customizing their intranet solution to ensure that auto-updates remained helpful and fast.

eBay, Archer Malmo, GSK, AMA, Maple Leaf, and other teams are either customizing SharePoint or creating their own intranet solution, which is the ultimate in customization.

ASSIST COMMUNICATORS AND CONTENT MANAGERS

Organizations are increasingly adopting the mentality that when it comes to intranet content publishing, it is better to have many publishers. Corporate Communications and other CEO-sanctioned communications continue to run the official corporate news sections, but intranet mangers often take on a decentralized content model, turning to others across the organization for diverse content. Distributed content means inclusive content and a rich tapestry of intranet offerings. It also means working with writers who are not necessarily trained in writing, let alone digital content writing, and whose main job at the organization is not to create intranet content.

To meet this challenge, the best intranet teams offer thorough, creative support for contest publishers, including their own section on the intranet or other support systems to help them deliver the best possible content.

The content management system (CMS), of course, plays a vital role in helping intranet communicators. For example, AMA's cloud intranet now allows all groups to publish and promote content. Similarly, Travelers' new CMS has streamlined content publishing, eliminating the bottleneck created by content owners submitting change requests to IT.

In addition to an efficient CMS, Travelers recognizes content owners' differing needs and responds with tiers of involvement when working with them. Also, a *Was This Helpful?* feature collects information from employees about each page so writers can improve the offerings. Finally, monthly training sessions, a library of training materials, guidelines and standards, and an open dialogue with communicators and content owners combine to create a potpourri of content confidence.

GSK's intranet offers a variety of help, including video tutorials, detailed documentation, support staff, and a collaboration social feed to suit different content editors' needs.

Delta offers training for authors, many whom have no writing background and a whose main job is focused on something other than content creation. Its writers are required to take courses about cyber security and writing for digital consumption, and this training has produced remarkable results. The intranet content has been cut in half, quality has improved, and content is better indexed, making search more successful.

AMA also gives content contributors multiple types of assistance, including training, monthly meetings for content managers, a flowchart about how the publishing process works, and a brand voice and style guide (the *Content and Procedures Playbook)*. AMA also works with content authors to correct any errors and monitors the digital calendar deadlines.

WFP has a two-day training course focused on the CMS and how to write for the intranet's users. Editors must complete this training before they are given access to the CMS. In the classes, they meet other editors and share experiences and best practices. WPF also offers an online community for editors working on internal platforms to share content guidelines and tips. Through these and other resources, including a how-to document, WFP has realized newfound, continual collaboration among editors from different offices. This reduces content duplication, produces better content, and, above all, benefits intranet users.

LEGACY ENTERPRISE APPLICATIONS AND MOBILE

Enterprise applications, however beloved, can thwart intranet designs when they fail to operate well on mobile. Travelers, Archer Malmo, and WFP have responsive sites, and all had issues with integrating or connecting desktop legacy apps that were unusable on mobile. In these situations, how is a responsive design to respond?

Typically, teams chose to exclude those apps (or links to apps) on mobile and display them only on desktop. In other cases, teams replaced the custom app on mobile with a different design that met the same user needs. However, this approach won't work for every situation. In some cases, teams are considering taking a step back and offering only the top tasks on mobile instead of offering everything that's on the intranet.

ADJUST DESIGN TO FIT "INTRANET-IN-A-BOX" TOOL OR PLATFORM

Organizations all confront a very personal decision when it comes to either making the intranet from scratch or using an intranet platform — and, if the latter, which one to choose and whether or how much to customize it.

Some teams investigate and find a near-perfect fit in a platform with many or at least enough of the benefits they seek. For example, PKP chose the Elastic tool, which had a basic approach that was highly compatible with the team's own. Other teams had to adjust some of their plans and design work to suit their selected platform. For example, Capital Power had developed an information architecture (IA), but then had to redo it and the navigation to fit the required format of Bonsai, the intranet-in-a-box solution it chose. Similarly, Maple Leaf Foods created a design independent of its chosen tool (Office 365), then had to do a redesign when it ran into implementation issues.

“MOBILE-SECOND”

Organizations know that mobile is important to their employees, and all winners already have or are in the process of creating mobile intranet access. That said, most winners have wisely taken a realistic, practical approach to mobile design — an approach that translates to working within very real resource constraints while still aiming high. In some cases, teams focus on desktop first, as with eBay. In other cases, they take an incremental approach. At AMA, for example, the first release was responsive for tablets, but not mobile; although the team created a framework for phones, but didn’t implement it in the first intranet release.

Security on mobile can also be challenging. Capital Power’s responsive intranet works across all devices. However, because mobile users must go through second-factor authentication, mobile use was lower than anticipated. The team is now seeking a simpler security solution.

CONTENT STRATEGY: REWRITE, DON’T MIGRATE

When creating a new intranet, how to best deal with existing content is a question that plagues designers. Many teams think about design, IA, and tools, but don’t do the content audits, inventory, and strategy that great intranets require. In contrast, this year’s winning designers rolled up their sleeves and dug in to a sometimes messy abundance of existing content. They then evaluated the needs and goals of the design, the employees, and the organization. From there, they carefully determined which content to keep, edit, remove, add, or further investigate.

The winning teams thus started with a smaller set of updated, desired content as they worked on the site’s structure. IA came from there, then menus.

Teams such as WFP, Delta, Capital Power, Travelers, and eBay edited and decreased their site content. AMA rewrote all content, reducing 27,000 pages to 120 pages.

Travelers’ tactic for reducing content was to communicate to content owners a clear, simple message: they were responsible not only for migrating their pages, but also for maintaining each of the pages they chose to migrate. Given that information, content owners deleted 52% of the legacy site’s content.

LAUNCH PLAN

The “build it and they will come” mantra may have worked in the movie *Field of Dreams*, but winning teams know it doesn’t usually work for intranets. Instead, teams planned how to advertise the new intranet and communicate its features to employees, as well as how to handle events surrounding the launch, including governance and how to measure use and respond to the unexpected.

Teams such as Capital Power and AMA used email newsletters and digital signage to point users to the intranet. Delta used advertising banners on the intranet itself. AMA used print ads outlining the new features and functionality. PKP posted advertisements in printed magazines, online newsletters, and in live online chats with the company’s board members.

On launch day, AMA offered an all-employee open house, which included snacks and a staffed information booth to help employees log on to the AMAtoday intranet for the first time. The team also developed interactive contests to guide employees to discover intranet features and content and gave the winners AMAtoday swag.

GSK is no stranger to launch promotions. After it adopted Yammer, which was first offered as a “disruptive computing” experiment in 2009, the team gave it a formal launch campaign to raise awareness of the platform and its benefits. The launch campaign lasted one month, and the team held follow-up growth programs during the year after launch.

Travelers’ launch communications appeared on the intranet and in emails, and were reinforced in business messaging. Six feature articles on enhancements taught employees about site capabilities, and the team posted tours on select pages to highlight new and improved features.

After launch, many teams collected feedback through analytics. For example, just after launch, WFP revisited redesign goals, related them to KPIs, and tracked baseline measurements via analytics for items such as visits, site search use, page load time, and visits from mobile devices. To measure the impact of design improvements, the team compared the numbers with the benchmarks it had collected in the previous year. When it looked at these measures again five months after launch to give employees time to acclimate to the new design, the team found even greater advances.

Archer Malmo emphasized governance planning, as did AMA, which had a council for governance that endorsed the new site’s goals and principles and supported it in management meetings and elsewhere.

LIGHT AND FAST

Lumbering intranet beasts are dying off. Winning designs strive for speed.

Users expect pages to load instantly, whether accessing them on a computer or a phone. When using public-facing websites, if a site’s page loads too slowly, people usually just leave. But when using an intranet, they often have nowhere else to go. So, employees sit and wait, annoyed and unproductive. Or, they call support or bother a coworker for the information, all the while aware that they would have been self-sufficient if only the intranet had worked.

Early in its project, the WFP team focused on designing a light, fast site, which is essential for its users. Many WFP users work in remote locations, have slow internet connections, and won't be getting fast ones anytime soon. The intranet team achieved faster speeds through optimized CSS files, minified JavaScript, a reduced number of images, few videos or animations (and those that exist come with a transcript), and a laser-like focus on making content helpful and easy to read.

Uptime and speed are also essential at eBay, which created and tracked minimal downtime standards. Maple Leaf also has a core set of speed and performance metrics that it monitors monthly. Finally, PKP uses indexing to ensure that search results load quickly.

Feature Trends

SIMPLIFICATION OF DESIGN

This year's greatest feature-influencing trend is the simplification of intranet designs. Make no mistake, these winning intranets are neither boring nor lacking. Rather, it seems that with maturity and knowledge, the best intranet teams today have less to prove and more to gain by focusing on foundational design elements — like IA, content, and orderly page structure — rather than on the latest user interface (UI) fads. Practicality over pizazz!

Travelers, eBay, and WFP are a few of the winners that chose to simplify to meet users needs, and to avoid efficiency issues or the frustrations users faced with legacy intranets.

VERY LARGE HEADLINE TEXT

For many years, small text meant pretty text. Today, big headline text is beautiful. Taking a cue from web design, intranets are using very large text for headlines and subheadings.

Larger-text headings make the page hierarchy easier to determine than when headings or subheadings are only minimally larger than the normal text. Other differentiators, such as typeface and color, can make headings further stand out. But many winning teams — namely, Archer Malmo, GSK, eBay, Capital Power, Delta, and WPS — know that nothing screams "title" like really big text.

Designers are careful, however, to ensure proportionality between headings and subheadings and normal text; when headers are disproportionally larger than text, it can imply "banner" or "promotion" to users, who may then choose to skip the content entirely.

SPARSE PAGES

In page design, the devil is in giving too much detail. Designers want to show users everything they might need to know. While such intentions are good, filling pages with too much content creates clutter and makes it harder for users to find what they need.

This year's winners resisted the urge to fill pages to the brim. Instead, they included only enough content on a page to make it worthwhile.

Archer Malmo, GSK, Delta, AMA, Travelers, and WFP are a few of the organizations whose pages give their content room to breathe.

FAT FOOTERS IN FULL FORCE

Footers have always been an intranet mainstay, but fat footers (which use a lot of vertical space) have had a love–hate relationship with intranets: they became popular about six years ago, then less popular in recent years. They are now popular again.

Fat footer use this year demonstrates the pragmatism of the winning teams, who chose to add the feature only because it fit their framework and will truly help their users. Gone are the days when intranet designers see a design pattern and adopt it simply because it's popular or their intranet solution includes it.

Teams carefully selected their fat footer content, which included

- a repeat of a global navigation;
- the site structure (such as a site map);
- important items that people might need to find quickly but use less frequently; and/or
- items traditionally found at the bottom of pages (such as the organization's address).

For example, PKP's footer reflects the site structure, while Capital Power uses the footer to supplement the global navigation, offering totally different choices — such as security information and location directions.

In general, a fat footer gives users a chance to find what they need if navigation and search prove insufficient. Further, regular intranet users who have explored a site's various areas may remember the footer content and go there directly to find what they need. A fat footer is thus a valuable offering on many intranets. Still, its very nature poses risks: offering many options in one section can take users a long time to scan, and fat footers occupy considerable page real estate, which can overwhelm users. To combat these issues, winning fat footer designs include the following traits:

- **Static information.** Once users have scanned footer information, they need to know that it's safe to tune it out as they explore the site. Thus, footer information should remain constant rather than change based on the page or intranet sections users visit.
- **Sections or subheadings.** To make the footer scannable, some designers use padding — such as extra whitespace — between different sections of related content. Other designs, like that of Capital Power, use subheadings to label the lists of links to distinguish various content sets.
- **Background color that's drastically different from that used for the rest of the page.** With just a glance at a fat footer, users should be able to tell they are looking at a section that is distinct from the rest of the page content. Using a different background color and text color in the footer is one easy way to do this. For example, WFP's page background is white and very light blue, with dark blue and black text. The fat footer is the opposite, with a bold royal blue background and white text. Likewise, Archer Malmo's page background is white, with dark gray text, while the fat footer has a dark gray background with white text. For users who can't distinguish color, WFP included a heading — *Find out more about these topics* — at the top of the footer area.

BREADCRUMBS ARE BACK

Breadcrumb links showing the current page's location within the IA are genius little nuggets that took a backseat for a few years on intranets. This year's winning intranets brought breadcrumbs back, offering another wayfinding cue to help employees acclimate and navigate. Placed as horizontal links in the upper left of pages, breadcrumbs help employees at AMA, Archer Malmo, Capital Power, GSK, and WFP.

FOCUSED YAMMER FEEDS

Rather than embedding Yammer as a feed solution and simply hoping it will thrive, the two organizations using Yammer suggest topics for discussion to engage employees.

GSK's *Join the Conversation* section typically features a discussion around a specified group, hashtag, event, or spotlight story. The site's Yammer functions to date include soliciting questions for executive broadcasts, allowing the executive team to communicate company financial information, letting employees share information about their projects, and letting GSK share updates on system outages and service changes.

Maple Leaf Foods integrated Yammer throughout the intranet and created various campaigns to promote sharing, such as one that encouraged employees to praise and recognize each other for good work.

SOCIAL SITE LINKS

Intranets offer links to the organization's social channels such as Twitter, Facebook, Instagram, YouTube, Pinterest, LinkedIn, and Yammer. Linking to these sites not only makes them easy for employees to access, but it also suggests that social channels are important and that employees should visit them.

Some designs — such as those at Maple Leaf, GSK, and Travelers Insurance — provide the standard icon for each social medium, but use the intranet's branded color for the icons. Interestingly, Capital Power skips the icons and instead uses just the link name for the social channels. Archer Malmo also foregoes the icons in favor of the site names, but in this case, the word acts more like a section heading that appears over current streams from each channel in the intranet's footer.

FOCUS ON BRAND

Ensuring that employees can easily access the organization's current and sanctioned brand collateral is important at every organization. To achieve this on the intranet, many teams give brand information its own pages or sections.

Archer Malmo's intranet offers presentations and collateral; GSK has branded templates for the intranet; and WFP has brand-related services, graphic design, templates, posters, logos, and more.

INFOGRAPHICS AND OTHER GRAPHICS

Making information memorable and easy to digest is a challenge for every content provider. The winning intranets achieve this using maps, icons, calendars, charts, and illustrations.

AMA, Delta, Maple Leaf, and other winning sites use infographics to describe everything from health and wellness to the organization's economic or sustainability impact to general information about the organization. Infographics with rich illustrations and colorful graphics make the content attractive to employees, and also offer a visual break from commonly used text and photos.

EMPLOYEE PHOTOS

Almost all the winning designs are peppered with photos of employees at work. This is a great departure from the stock-art images on intranets of the past. The prevalence of social media and photos of people on the web has likely broken the barriers that used to confine intranets, and people basically expect to see their own picture and those of their colleagues.

Organizations are still very aware of user privacy, while also recognizing the value of employees seeing themselves, teammates, and coworkers from totally different groups doing their jobs. It creates a union and enhances empathy among employees.

Sites like GSK, eBay, Delta, Capital Power, AMA, WFP, and Travelers all show images of employees at work or at play. PKP has vivid photos of employees working in the field and in offices. Likewise, Maple Leaf has rich photos of employees in manufacturing plants as well as in the office.

EVENT REGISTRATION

Whether custom-built or part of an intranet platform, niceties on the intranet can make all the difference. Features such as calendars and event registration forms expedite planning for events and make it easy for organizers to track headcount and the people planning to attend. From the employees' perspective, these features make it easy to RSVP and add events to their calendars. A few organizations, including Delta and Maple Leaf, are very enthusiastic about their intranets' event registration features.

Best Practices for the Intranet Design Process

Some design elements come into vogue and flourish, while others fall out of favor, yet some design processes remain evergreen as best practices. These processes are not new, yet they are consistently effective components of intranet design.

For the past 16 years, we have seen intranet design patterns across case studies of award-winning intranets, as well as in our intranet research work for our clients and other NN/g reports. Specific steps exist to create intranets that meet user needs. Screenshots and features might inspire you, and case studies might educate and inform, but without a good design process, it is difficult to create an outstanding intranet.

Here, we offer a few of the most important recommendations for designing a successful intranet that truly helps the organization and its employees.

BASIC STEPS TO A GREAT INTRANET DESIGN

Successful teams take several common steps to create great designs:

1. Get management buy-in
2. Quickly pinpoint stakeholder champions across the organization and keep them involved
3. Launch the discovery process
4. Review the current intranet's analytics
5. Inventory and audit tools and applications
6. Review and plan resources and intranet development
7. Run field studies and usability tests of current systems with employees
8. Set intranet goals
9. Create and share personas
10. Brainstorm design ideas
11. Continually collaborate with stakeholders via interviews and workshops
12. Review design iterations with target users and conduct ongoing usability testing
13. Inventory and audit content
14. Research and build the IA
15. Conduct card sorting exercises with stakeholders and users
16. Iterate menu design and organization
17. Tree test categories and links
18. Develop a content strategy

19. Plan and communicate a governance strategy
20. Support, train, and establish ongoing enrichment and rewards for content managers and authors
21. Establish a sustainable governance model
22. Promote and advertise the intranet before, during, and after launch (or launches, in an Agile world)
23. Set up analytics before launch
24. Measure UX through research and other metrics

CONSIDER INCREMENTAL FEATURE ADDITIONS

Is your team equipped to tackle a big intranet project all at once? Or would implementing a few parts gradually be more feasible? Whether using Agile or some other development process, you might find that doing a little at a time is more manageable. Implementing a few features at a time also shows progress. Still, you must consider your users. Will they deal better with a new, cohesive design? Will building the design in stages confuse users and result in a Frankensteinian UX?

If you choose an iterative development approach, ensure that your UX designers are focused in three directions:

- Toward the future, on the designs yet to come
- In the present, on the designs you are currently implementing
- In the past, on previously implemented designs

The objective? To ensure a cohesive look and feel throughout the intranet, without disrupting what people already know.

USE SOCIAL TO LEARN

Social features obviously help employees help each other. But not all organizations are using social features to learn. Monitoring social participation can help your organization learn about the needs, feelings, and ideas of its employees.

You can analyze this social information to learn more about intranet design, as well as to improve the organization overall and the satisfaction of employees, too.

PLAN FOR MOBILE FROM THE START

Determine whether the intranet has limitations on mobile. For example, additional security authentication might annoy users and prevent them from going to the intranet. If legacy applications are embedded or linked to from desktop they might not work on mobile? Consider how this might impact perceptions, and whether (or how) you might provide an alternative mobile solution.

Decide how to optimize for mobile access and desktop from the start, including how you will do it and which devices you will target. Teams today almost always choose a responsive approach to accommodate all display sizes, rather than pigeonholing people to a particular device. Regardless, if you plan, prioritize, and test features and content throughout the design process, you can optimize the UX for all your targeted devices.

When you do usability testing, make sure to test the mobile experience, too, and not just the desktop. Even with a responsive design and one codebase, the UX is different on mobile devices, and you should test those screens separately.

WATCH EMPLOYEES WORK

One of the great benefits of working on an intranet is that your users are all around you. 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 ask to watch how your colleagues work. Observe how they naturally use (or don't use) the intranet, and where design opportunities exist for making it a more useful part of their day-to-day tasks. Although they are your colleagues, people have different organizational roles that entail different intranet needs and require access to different types of information.

And what about the people in distant locations? Use online conferencing tools to run moderated remote tests, and use remote testing tools to run unmoderated research sessions. Technology today makes it cheap and easy to collect even empirical research from colleagues around the world.

USE SITE ANALYTICS

Set goals for the types of analytics you want to capture on the intranet. Next, capture that data both *before* the new project begins and *after* launch. You can then compare the two data sets. Finally, keep up with analytics; they are powerful numbers and can support (or disprove) the hypotheses you derive from behavioral user research.

CONDUCT USABILITY RESEARCH

Remember: 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. Test with wireframes, prototypes, and even paper mockups. Or, if you want to introduce design elements similar to those you see on a particular website, use that website to test the features. You can watch people using any current system, even if it's not an intranet, to determine which features or elements are well designed.

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 encourage design teams to get a group of designers and developers together — even for just 20 minutes — to review a site's design, discuss what happened in testing, and then identify, discuss, and agree on the top usability issues.

SUPPORT THE LAUNCH OF A NEW INTRANET

Whether you do a large redesign or change elements incrementally, it's important to involve people from throughout the organization in design, pre-launch, and post-launch activities. Advertise the redesign and the new features. Following are some tips to create a good intranet design process:

- Include key players from around the organization in the design process. These people can help generate design and feature ideas, as well as excite their groups about the coming new intranet.
- As you develop the new design, consider giving employees access to it (on a staging server) and encourage their feedback. Explain the major changes and highlight the benefits.
- Include usability and beta testing in the design and communication processes. Follow up the usability research by communicating how user behavior and feedback helped steer design changes. (But don't use the testing sessions themselves to convince people that the intranet is better; these sessions are best used solely for research and analysis.)
- Designate staff members to respond to employee questions and comments for the first few months after launching a new design.
- Stage events, contests, and promotions on the intranet itself and in other places to describe new features and processes.
- Write clear, descriptive advertisements for the new design and specific features. Place them strategically in physical work places such as in elevators and the cafeteria as well as in email newsletters, in online news sections, and on the intranet itself.
- Keep promoting the site for a few months after launch; some employees may not have time to explore it right away.

UNDERSTAND THE TECHNOLOGY AND CONSIDER THE CLOUD

Some intranet teams are stuck with particular technology solutions. Others have the freedom to shop around for the best tool for the project. In either case, it is important that teams take the time to understand what the technology can — and can't — do. It's equally important to decide whether the functionality meets the organization's needs. Just because a tool lets you provide a particular feature, doesn't mean it's a good solution for your employees.

Over the years, winning intranet designs have usually come from organizations that took a technology solution and made it fit their needs through extension and/or customization, as opposed to simply using it out-of-the-box. These teams took the time to understand their tools inside and out, and worked with them to meet their organization's specific requirements.

Some teams have the time and expertise to do this themselves. Others rely on outside experts to help with technology issues. Some companies can customize from the get-go, while others must stick to what's offered. Knowing the technology and any challenges up front can help minimize unexpected glitches down the road.

Also, think about intranet cloud solutions and the pros and cons they bring. Security can be an advantage on the cloud, as can storing data there, thus eliminating the need for servers and local hard drives. System auto-updates are another benefit, but this can also be a problem: auto-updates can completely break intranet customizations. When using the cloud, you typically must choose between auto-update and customization; you rarely get both.

Finally, do your best to audit content and derive a general IA before choosing a tool. Some solutions have rigorous requirements, and you won't know whether you can meet them unless you have at least some detailed information about your design in advance. Your design may not fit with the tool's requirements so strive to learn whether this is the case before you commit to any tool.

PERSONALIZE AFTER YOU CREATE THE INFRASTRUCTURE

Personalizing the intranet can help people more easily find what they need and expedite their work. Hiding things people 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 people. This process typically involves HR and other departments, and sometimes many databases as well. In short, it can be a lot of work and involve legacy systems and half-organized data consolidation.

All intranets should ultimately strive to give each user an effective, personal experience. But don't get ahead of yourself and try to do this before the back-end infrastructure is in place.

HELP YOUR CONTENT CONTRIBUTORS SUCCEED

Inventory and audit your content before doing anything else. Remove what you don't need (redundant, outdated, and trivial = ROT), edit when it makes sense, and curate, curate, curate.

The most welcomed intranets are those with fresh information that people need and want. One way to keep information updated and interesting is to give employees ways to add and edit information. Allowing people other than designated content providers to also 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 overall, which leads to more varied and useful information, which drives more employees to the intranet, and thus ensures that the intranet remains a business-critical tool.

CONSIDER ACCESSIBILITY

If your organization has any employee retention to speak of, you probably have older people working with you. As people live longer in our modern age, many work longer too, yet their sight and dexterity, among other things, gradually wanes. Intranets should not forsake this important population. Designs should make it easy for all employees to work effectively.

Assistive technology is another factor. Many organizations employ — or at some point will employ — people who use assistive technology. Yet many intranets submitted for consideration in our Design Annual posed accessibility problems for users with low vision, no vision, or motor-skill challenges. The primary problems we observed were too many busy graphics, tiny text, poor contrast between the text and background, limited space between links and text, and small link targets that were hard to click.

MEASURE ROI

When embarking on any intranet redesign, measure whatever you can. To show the new site's return on investment, you must have starting values against which to measure.

Most intranet redesigns make obvious strides forward, with great usability improvements that foster productivity and improve work efficiency. Yet it can be difficult to formally — or informally — measure ROI on intranets. Measurements can be tricky due to tight schedules and the way organizations allocate money. For example, the money to design and maintain the intranet might be allocated to the vice president of IT, while productivity gains are found in the HR or corporate communications department.

A simple ROI measurement is time on task — that is, the time people require to accomplish a task, both before and after a redesign. Use the decreased measure of time on task to calculate the resulting financial savings across your organization. Communicate the positive ROI both to the various departments involved and to higher levels, so that even upper-level managers understand the importance of well-designed internal systems.

Consider other ROI measurements as well:

- Do collaboration tools or stories about individual projects or employees result in new work sold, new solutions found, or new collaborations across the organization?
- Do idea boards result in more efficient processes and savings across the organization?
- Are networking tools promoting collaboration and improving team dynamics?
- Does automating a process on the intranet free up time for the department previously responsible for that task?
- Does providing essential tools and information take employees' less time than finding the same information on their own?
- Does enabling online communication or meetings decrease travel costs and time compared to in-person meetings?
- Does moving information online reduce printing costs?

GOVERNANCE: PLAN TO MAINTAIN AND ENHANCE THE INTRANET

We've seen too many companies complete redesign projects and then leave the site to run itself, only to find the intranet a big mess again a year or two later. For sites to be successful, they must be maintained and managed. Although the team dedicated to a redesign is, of course, going to be larger than a team left to run the intranet once it's established, the remaining team must be large enough to support the site structure, help content contributors, and plan and execute enhancements and continual improvements to the site.

Intranet development shouldn't be viewed as a finite project, but rather as a continual process that includes the following:

- Governance team meetings
- Assigned (and accepted) roles
- Budgeted resources
- Support for content creators
- Audits and reviews of site structure and content
- Search tool enhancements
- Technology maintenance

As this list shows, at the end of a redesign effort, much work remains to be done.

American Medical Association (AMA)

OVERVIEW

COMPANY

The American Medical Association (AMA) is the premier national organization providing timely, essential resources to empower physicians, residents, and medical students to succeed at every phase of their medical lives. Physicians have entrusted the AMA to advance the art and science of medicine and the betterment of public health on behalf of patients for more than 170 years.

Headquarters: Chicago, Illinois

Company locations: The AMA has three locations: its headquarters in Chicago, and offices in New Jersey and Washington, DC.

Locations where people use the intranet: Employees in all three locations use the intranet.

Annual revenue: The AMA is a 501(c)(3) nonprofit organization.

THE INTRANET

Users: Approximately 1,000 users; essentially all AMA employees use the intranet as a digital workplace that helps them work smarter and participate in cross-functional knowledge sharing.

Mobile approach: Responsive web design

Technology platform: Office 365 and SharePoint Online

TEAM

American Medical Association

Executive Leadership: Leslie Weber, Rod Sierra

Project Leadership: Justin DeJong, Toni Canada, Kristina Goel, Doug Fedorchak, Jordan Brandl

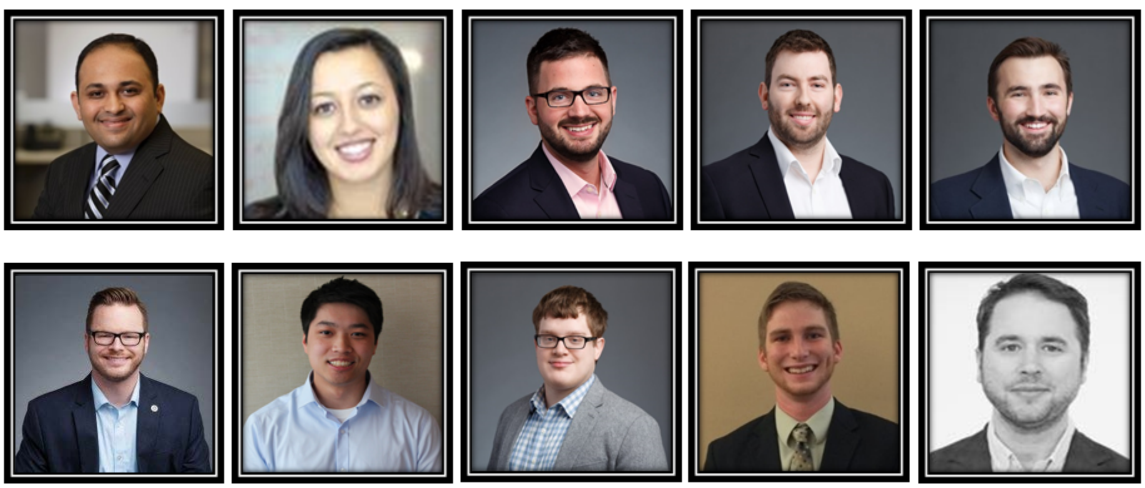
Intranet Product Team: Catherine Williams, Kristen Reynolds, Steve Rousopolous, Doug Mosurak, Josh Stahl

West Monroe Partners

Kaumil Dalal, Gordana Radmilovic, Alex Foucre-Stimes, Ryan Milton, Nolan Hopkinson, Adam Kerr, Tim Chow, Ted Nubel, Adam Nolte, Ted Novak (Clique Studios)

INTRANET TEAM

AMA Team members shown here (left to right): Catherine Williams, Doug Fedorchak, Toni Canada, Justin DeJong, Kristina Goel, Jordan Brandl, and Douglas Mosurak.



West Monroe Partners team members shown here (top row, left to right): Kaumil Dalal, Gordana Radmilovic, Alex Foucre-Stimes, Ryan Milton, and Nolan Hopkinson; (bottom row, left to right): Adam Kerr, Tim Chow, Ted Nubel, Adam Nolte, and Ted Novak (Clique Studios).

HIGHLIGHTS ABOUT THIS WINNER

With a site that had changed very little in 12 years, the AMA intranet team, together with West Monroe Partners, had both a daunting challenge and a great opportunity. They not only had to redesign an intranet that had grown to include more than 27,000 pages, but they also had to introduce new tools and collaboration processes to move the intranet forward and directly impact how AMA work is done. In addition, they used the redesign as an opportunity to improve internal communications and collaboration.

The AMA team decided to move the intranet onto Office 365 and SharePoint to support work and collaboration among the organization's 1,000 employees, who worked in 18 diverse business units in Chicago, New Jersey, and Washington, DC.

Project highlights included the following components:

- **Reduce and rewrite content.** The 27,000+ page intranet was filled with out-of-date content and pages that were unreachable via navigation or search. The team assessed the value of these pages to reassemble a site that met users' needs with only 120 pages of content. It also switched from centralized to decentralized publishing, creating a structure of content authors and managers throughout the organization. The new content roles are supported with regular meetings and communication.
- **User research and involvement.** The project started with a survey to assess use of and opinions about the intranet. The team used the feedback to set goals and help measure improvements and success. It also enlisted the help of a representative set of users throughout the development and design process, and even created four different personas that helped inform everything from visual layout and IA to security and permissions.
- **Facilitate change management.** Any intranet update is a change for employees. The AMA update not only included a new site filled with streamlined content, but also introduced new workflows, new collaborative tools, new technologies, and new publishing processes. Keeping users, content creators, and stakeholders informed of improvements and progress throughout was essential.
- **Promote launch day.** The team built excitement around the new site by using the "best" of the worst comments submitted on the survey about the previous intranet to create a "Mean Tweets" style campaign. The campaign used the negative things said about the site to advertise the new and improved site. On launch day, about one-quarter of all employees attended an open house, complete with giveaways, a photo booth, and a digital scavenger hunt. To encourage use, the team went beyond thinking solely about the intranet to revamp other internal communication channels — such as newsletters and digital signage — to push users to the intranet.

BACKGROUND

Goals

During a 2014 project aimed at developing an enterprise digital strategy, the AMA team recognized that the organization was not keeping up with technological advances that could help it engage with and deliver timely business information and resources to its nearly 1,000 employees. During this time, the organization was also in the midst of considerable transformation. Company leaders thus had to ensure that employees understood and were aligned with its ambitious strategic objectives aimed at serving its overall mission to improve the nation's health.

Improving internal communication and collaboration platforms was critical to shepherding this cultural change.

The organization's intranet had changed very little in the prior 12 years. With 18 diverse business units, including Advocacy, Enterprise Communications & Marketing, Finance, Health Solutions, Human Resources (HR), and Portfolio Management, it was a struggle to govern the intranet and its content effectively. As a result, the number of pages had bloated to more than 27,000.

In November 2016 a pre-redesign quantitative study was fielded to nearly 500 employees. The survey's objective was to measure employee satisfaction with the intranet before the redesign. The survey results helped the team determine why employees did and did not use the intranet, probe the reasons for any dissatisfaction, and explore how the intranet could help foster more collaboration.

The team reviewed survey feedback from employees across business units. The message was clear: employees felt disconnected, struggled to find subject matter experts internally, and found navigating the intranet's forms confusing. They also said that they relied heavily on managers or IT Support Center staff to answer questions.

To address these concerns and improve workplace collaboration, connectivity, and efficiency, the team initiated a project to revamp the intranet into a modern digital workspace for employees. It engaged West Monroe Partners in February 2016 to assist with the effort. Working with West Monroe, the team established four objectives for the intranet redesign project:

1. Increase employee engagement and satisfaction
2. Promote self-service
3. Serve as an information gateway
4. Connect employees

Challenges

The project faced two main organizational challenges that required major process changes; on the flipside, the challenges also represented tremendous opportunities to transform the organization. The challenges were as follows:

- **Aversion to change.** A key challenge in developing the new intranet was the organization's culture and traditional aversion to change. One implication? Many staff members had little familiarity or comfort with modern technologies, including digital workspaces and SharePoint Online tools. This also meant that the organization had inadequate technology, staff, and skills to support its business goals.
- **Need for governance.** To build a new, more robust intranet, the organization had to change the way it governed intranet content, including its publishing approach and how it might better ensure content that was relevant, timely, and accurate. Traditionally, the organization's business units relied on central IT resources to publish content and, because it was difficult to manage content dynamically, the intranet grew to more than 27,000 pages over 12 years. As part of the project, the team had to figure out how to reduce that to a manageable number of pages, and then manage those pages effectively on an ongoing basis. This required that the organization begin to see the intranet as a living, breathing product that requires a clear governance structure to support it in a thoughtful manner. The team also had to consider the time required to train content managers for the new intranet to ensure that knowledge transfer was as effective as possible.

Image 1. The Old AMA Intranet Homepage. This captures the look and feel of AMAweb, the AMA's previous intranet. The homepage allowed for only text-based announcements, with no categorizations to help users browse content. Multiple navigation bars with inconsistent formatting created confusion, and many of the links resulted in 404 (page not found) errors. Also, the employee events calendar navigated to another SharePoint site, and site users described search as "useless." *01_AMA_01_OldHomepage.png*

DESIGN REVIEW

Homepage

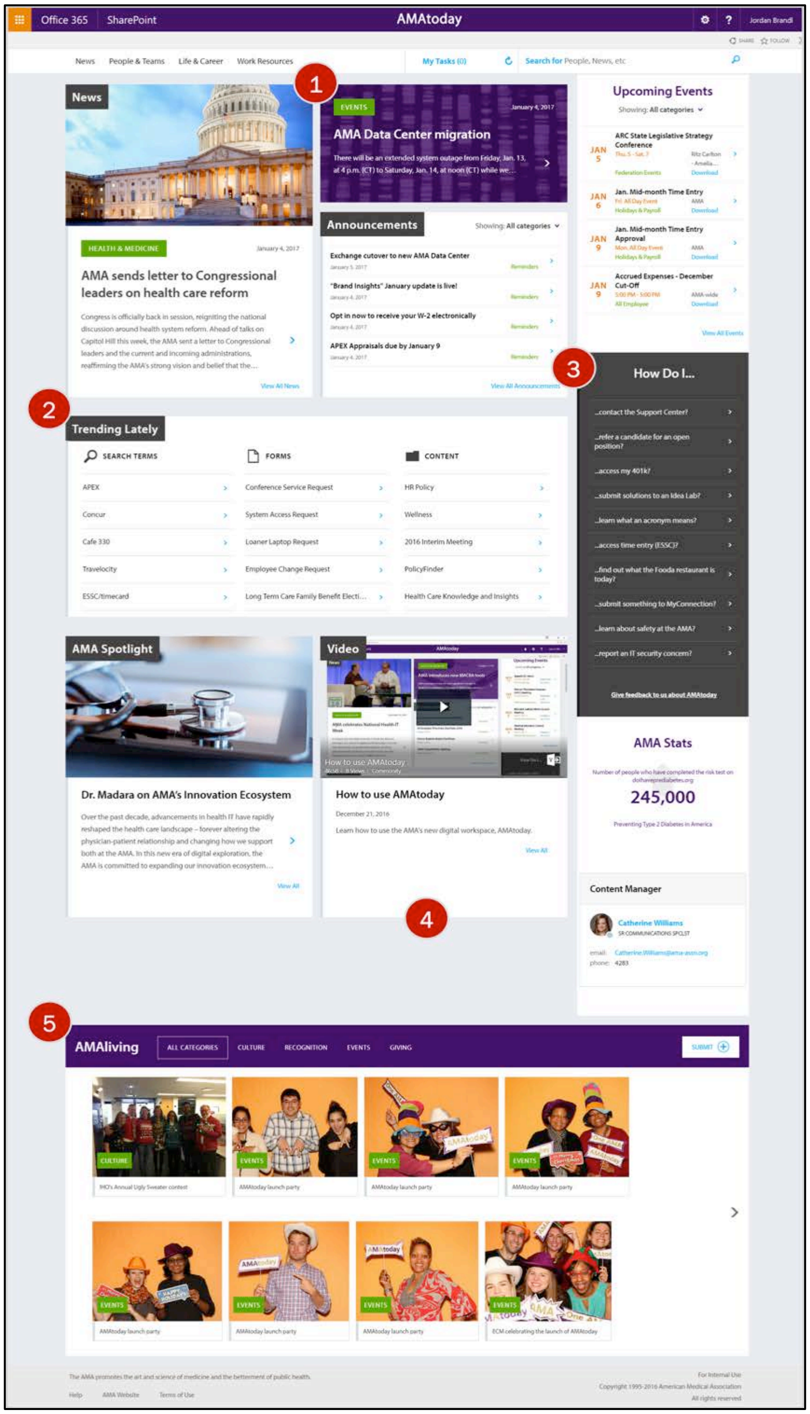


Image 2. The New AMA Intranet Homepage. The New AMAtoday homepage. *02_AMA_02_Homepage_Live.png*

Homepage Highlights

1. **News, Events, and Announcements.** The homepage prioritizes new and timely information, with one section dedicated to the day's top news story, another highlighting an event, and an area for announcements. *News* items are dated and accompanied by a clear headline, the first few sentences of the story, a date, and a link to read more. There is also a link to *View All News*. The business-unit-generated *Events* and *Announcements* sections also feature clear dates, so users can easily identify updated information. An *Upcoming Events* calendar, which for the first time includes events from across AMA, appears in the upper right corner, with clearly listed dates and times, links to more information, and the ability to sort events by category. Tags are a new addition to site content, which gives users another way to sort and organize information.

2. ***Trending Lately*.** The homepage's *Trending Lately* section features a list of the site's recent popular search terms, forms, and content. This area acts as a shortcut to content that may be important for a limited time, such as insurance enrollment forms. A content manger curates the list based on analytics and general timeliness to ensure that the information is useful.

3. ***How Do I*…** The *How Do I…* section has links to common user activities, including accessing a 401(k), contacting the Support Center, or referring a candidate for an open position.

4. **Spotlight, Video, and Stats.** The bottom of the page is rounded out with a featured story on leadership and teams in the *AMA Spotlight* area, a featured video (in this case, an introduction to the intranet itself), informs users about interesting facts about the AMA. Corporate videos are a new addition to the site.

5. ***AMAliving*.** Creating opportunities for connection was a goal of the site, particularly since one of the main offices had recently moved to a new building with fewer common areas and fewer chances for casually connecting during the workday. In response, the team created a photo-sharing section of the homepage, called *AMAliving*. Users can submit photos, which are posted pending approval by the communications team. This site area has become very popular, and the large *Submit* button shows users how easy it is to send in a photo. The screen above shows photos from the new intranet's launch party.

Navigation

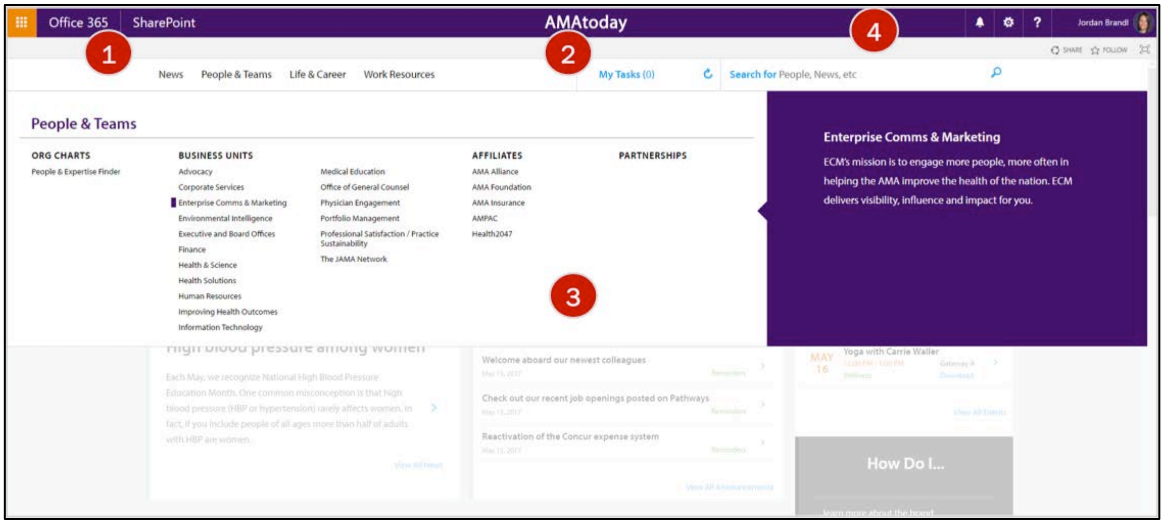


Image 3. AMA Intranet Megamenu. Hovering on one of the top-level menu items of *News*, *People & Teams*, *Life & Career*, or *Work Resources* expands the menu to show level 2 (bold across the top) and level 3 (listed beneath level 2) items. Hovering over level 2 or level 3 items exposes additional content in the purple box to the right. *03_AMA_03_Navigation_Live.png*

Navigation Highlights

1. **User-focused and task-based categories.** On the previous intranet, users struggled to find information, which was arranged based on the company's organizational structure. The new site revamped the site organization to focus on user needs and tasks. Top-level categories of *News*, *People & Teams*, *Life & Career*, and *Work Resources* make it easy for users to know where to go to find the tools and information they need for their day-to-day work. Navigational categories were created after conducting card-sorting exercises with employees.

2. ***My Tasks*.** Users can access personalized content through the site's *My Tasks* section, which gives users quick information about upcoming deadlines so they can take action on assigned tasks.

3. **Megamenu.** Navigation is displayed in a megamenu, giving users immediate access to three levels of navigation. Subcategories are displayed in all capital letters and bold type to distinguish them visually from the third-level options below. When a user hovers over a link in the megamenu, additional information about that content is displayed on the right side of the megamenu. A colored rectangle indicates the category currently being viewed, and that rectangle's color matches the background color of the information displayed on the right. The team implemented this feature with a slight hover delay to prevent the menu from flashing new content at users when they were merely mousing over categories.

4. **Search.** Site and people search is available on every page of the site via a search box in the top right corner. Descriptive text shows users that they can search for various types of information, including people and news.

Business Units

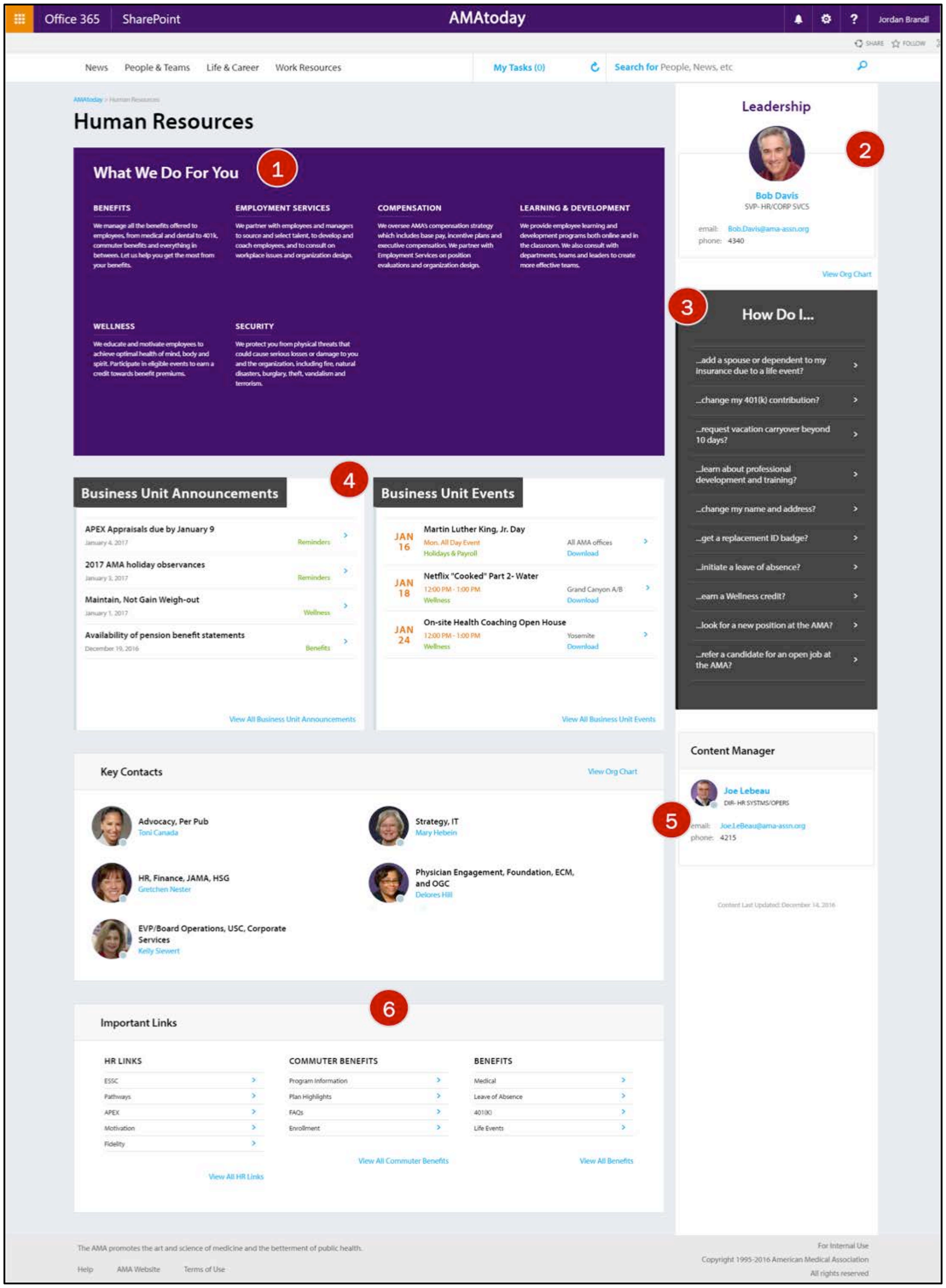


Image 4. AMA Intranet Business Unit Template. This same template was used for all business units, and is the jumping-off point for this business unit's site. *04_AMA_04_BusinessUnitTemplate_HR.png*

Business Unit Highlights

1. ***What We Do For You*****.** The page's first section is *What We Do For You*, which gives a concise summary of the unit's work to inform members of other business units. The section includes links to each of the business unit functions, leading to content pages within the site or to external links.
2. ***Leadership*****.** This section includes the group leader's photo, name, email address, and phone extension, making it easy to get in touch. A link to the organizational chart also appears, so users can understand the leader's role and position in the organization.
3. ***How Do I…*** As on the homepage (and in the same location), the *How Do I….* section here provides business-unit-focused frequently asked questions. This offers two benefits: it gives users easy access to commonly needed information or processes, and it provides an additional, task-oriented introduction to the business unit's work.
4. ***Events* and *Announcements*****.** Also similar to the homepage, these sections list business-unit specific events and news. Depending on how the content is tagged, it might appear both on the business unit's page and in the AMA homepage's *Events* and *Announcements* listings.
5. ***Key Contacts*****.** This section lists up to eight important group contacts so employees know whom to contact with questions. Here and in the *Content Manager* section to its right, contacts are listed with click-to-chat capabilities, making communication simple
6. ***Important Links*****.** The bottom of the page provides short lists of links important to the business unit audience, with links to see lists of all links.

Content Pages

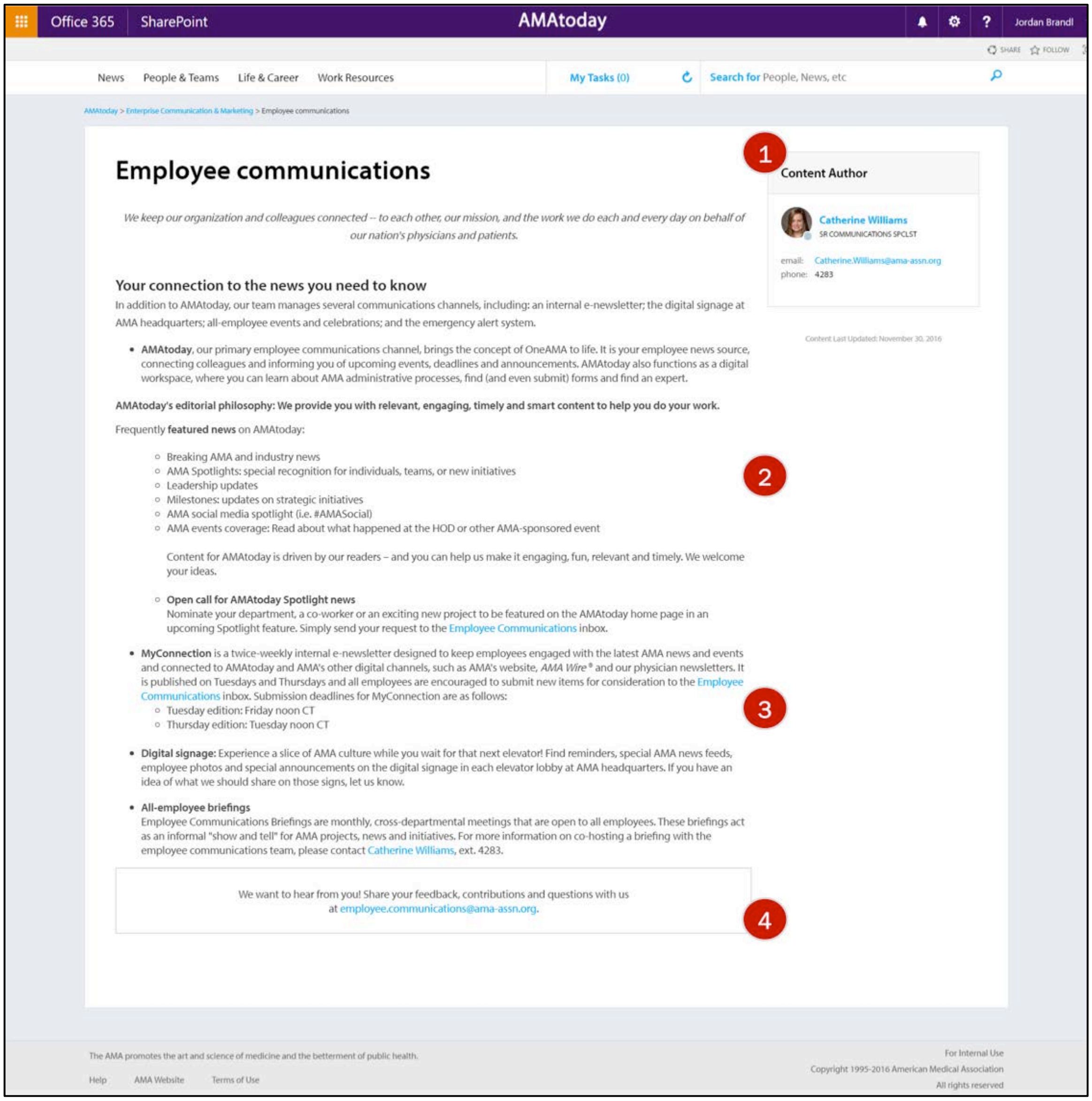


Image 5. AMA Intranet Content Page. The template for this third-level (general business unit) content page enforces a company-wide style that governs the available fonts, colors, and sizes. These elements are consistent across the site. The page's content manager is shown in the upper right, so users know whom to contact with questions about the page. *05_AMA_05_Level3_1.png*

Content Page Highlights

1. ***Content Author*.** The new intranet brought a shift from centralized to distributed content publishing. Content authors are selected based on their expertise, such as communications, marketing, or publishing, and their characteristics, such as being collaborative and willing to expand their current skill set. The team built content accountability into the template, adding the content author's information to each page of the site. The information includes the author's photo, name, title, email, and telephone number, as well as the date of the last content update. This tells users how timely the information is and whom to contact with any questions or corrections.
2. **Consistent template.** A consistent template is used for content-level pages throughout the site. The template enforces the use of the company style governing fonts, colors, and sizes.
3. **Inline links.** One of the many benefits of rewriting and organizing content in the redesign is that offers the ability to cross-link to other, related resources. The site does an excellent job of linking employees to appropriate resources within content pages, allowing them to find additional information easily if needed.
4. **Feedback.** When appropriate, stories include a call for feedback at the end, inviting user comments or questions.

Forms

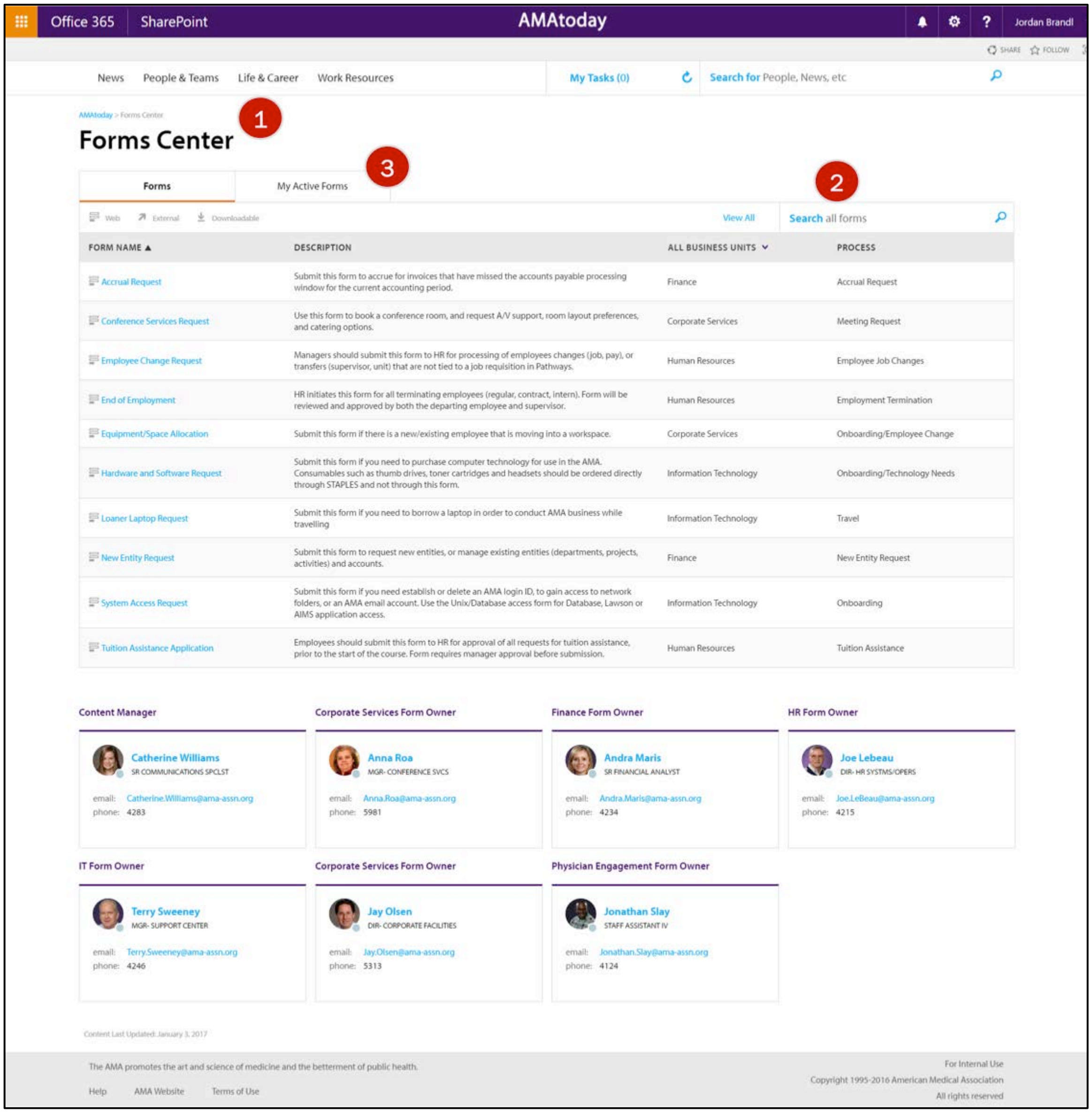


Image 6. AMA Intranet Forms Center. Here the forms tab in the *Forms Center* is selected, with a key showing the iconography of form types: web, external, or downloadable. Forms are listed below this, with descriptions, business units, and processes. Users can filter by business unit or sort by any other column. Search is instantaneous (reacts while you type) and is available in the top right. Clicking a form will either download it (if it's downloadable), open in a new tab (if it's external), or open in the same tab (if it's a web form hosted on AMAtoday). The *View All/View Popular* toggle to the left of the forms search bar lets users view all available forms or a subset of popular forms curated by the center's managers, who are shown at the bottom of the page. *06_AMA_06_FormsCenter_AllPopular.png*

Forms Highlights

1. **Process change.** A main goal of the site was to automate forms. The previous intranet had made it quite difficult to find and use forms. To prioritize which forms should be automated, the team looked at use cases to determine which offered the highest timesaving opportunities. A central library of forms saves time in locating the correct form, and automated workflows streamline processes.
2. **Searching and sorting.** The *Forms Center* has its own dedicated search to help users find what they need. Users can also sort by form name or business unit.
3. ***My Active Forms*.** Forms that users are currently using in some way are listed in *My Active Forms*, giving them a shortcut to important content. The *Active Forms* view lists all forms and their current status, such as *Pending Support Center Approval* or *Ready for Pick Up*.

Search

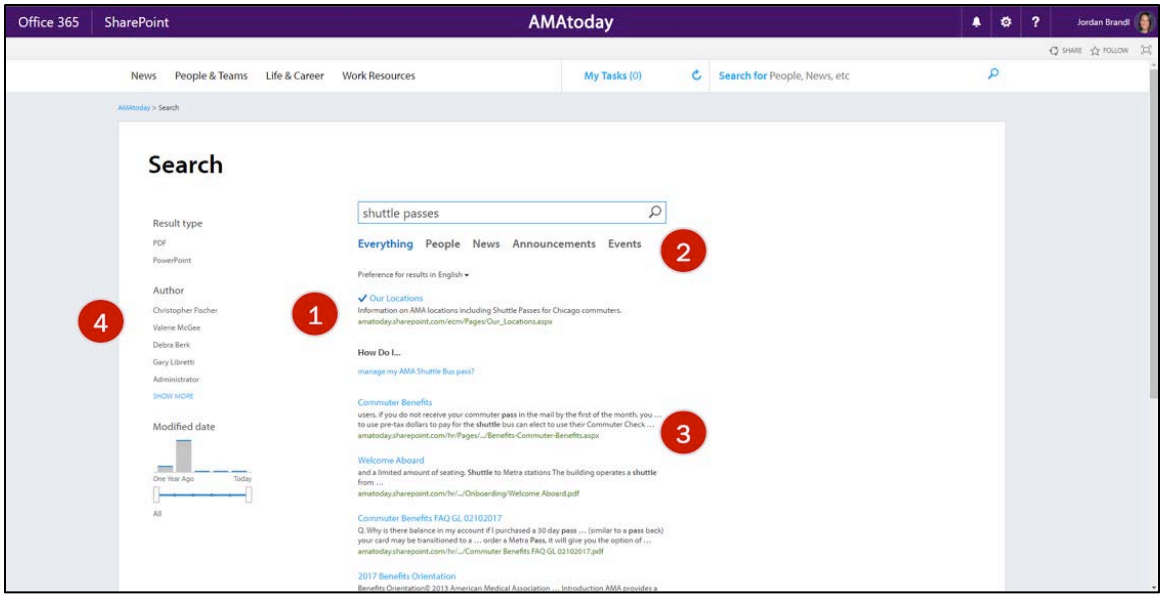


Image 7. AMA Intranet Search. This example search page includes people, returned at the top and bracketed together with pagination.
07_AMA_07_Search2.png

Search Highlights

1. **Best bets.** Best bets, or suggested results, are shown at the top of the results page and indicated with a blue checkmark. The team coded anything that appears in the megamenu as a best bet within the search results.
2. **Scope.** The default view is all results, indicated by the *Everything* category above the results. Users can also select to view only *People*, *News*, *Announcements*, or *Events* in their results.
3. **Results.** Search results list the page title followed by a snippet of text that includes the search query.
4. **Filtering.** Refiners based on time, document type, or creator are offered on the side of the page.

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
West Monroe Partners LLC A full-service business and technology consultancy that works with dynamic organizations to reimagine, build, and operate their businesses at peak performance. Its team of more than 800 professionals offers an uncommon blend of business consulting and deep technology expertise	• Partnered with the AMA to design and build AMAtoday, a digital workplace leveraging best practices on the Office 365 platform • Provided methodology and human-centered design frameworks • Facilitated development of employee personas • Led user experience (UX) design of site prototype • Worked with Clique Studios to create visual designs that reflect the AMA brand

Design Approach

The AMA team's relationship with West Monroe Partners was beneficial. The project followed West Monroe's DEEPEN methodology (define, empathize, envision, plan, and enact) to ensure it created an employee-first intranet. DEEPEN let the design team combine employee input with human-centered design and rapid prototyping frameworks to bring digital workplace design to life. Research activities included:

- **Surveys and interviews.** The team conducted an association-wide survey to gain a baseline understanding of employee perceptions about their workplace, including the usefulness of existing intranet and other digital tools. The survey provided a mix of qualitative and quantitative data, which was analyzed and presented to the product team. This data validated the team's own observations about needed improvements, and also highlighted previously unidentified challenges employees faced when trying to work digitally. Following this initial survey, team members interviewed a cross section of more than 40 employees from all business units, AMA tenure levels, degrees of digital aptitude, and leadership responsibilities. This group continued to provide feedback during the project's design and development phases.

- **User research.** The intranet team engaged employees at all levels of the organization to understand their needs, habits, behaviors, and motivations. The team used human-centered design frameworks and rapid prototyping to incorporate employee feedback throughout the design process. For example, before beginning design, team members conducted an association-wide survey to understand employees' perceptions of their workplace and the usefulness of existing intranet and digital tools. They also conducted detailed interviews with employees representing a cross section of business units, organizational tenure, digital aptitude, and leadership. These interviews provided greater insight into how employees work and how the AMA can help them become more productive, collaborative, and engaged. The AMA's Employee Communications team continued to involve this panel by asking its members to review and provide feedback on the intranet prototype. The project team also used a survey and ranking exercises to prioritize digital features and functions based on their importance to employees.
- **Personas.** Four personas were identified during employee workshops led by West Monroe in April 2016. More than 40 employees from across AMA business units participated in the workshops. The workshop objectives were to understand how different AMA user groups interact with the intranet, and then define the user archetypes to assist with the redesign.

  The four personas identified were *New Hire* (the neophyte), *Connected Employee* (the net-worker), *Efficient Employee* (the organizer), and *Content Author* (the publisher). For each persona, West Monroe identified specific work styles (behaviors), top-used features on the current site, who they often collaborated with, and how they interacted with the current intranet.

  During multiple small-group workshops with employees, team members asked prepared questions to create dialog around behaviors, including communication methods, technology usage, old intranet (AMAweb) interactions, forms usage, and motivations and frustrations with using the intranet, along with other topics. To draw honest responses, they made sure not to include executives alongside their subordinates. They organized the findings and combined them with objective data, such as tenure and job title, to develop life-like representations of a cross section of AMA's workforce.

  These personas helped team members match features to profiles, helping them make decisions about visual layout, IA, and security and permissions.
- **Content analysis.** The combined project team also analyzed the top content needs, gathered through employee feedback, and decided to relaunch the site with 120 pages of content, down from 27,000 on the previous intranet.

- **Use cases.** The team also analyzed use cases to prioritize which forms to automate (such as those offering the greatest timesaving opportunities).
- **Card sorting.** The team's focus was to create an employee-focused site navigation based on task execution. To accomplish this goal, team members developed an inventory of existing and new intranet pages and links and put them on index cards for a card-sorting workshop. In collaboration with users, they organized the cards in logical groups and developed level 1 and level 2 labels. For example, the level 2 items *Careers*, *Learning and Development*, and *Performance Management* were rolled up under the level 1 *Employee Development* item, which was under the *Life and Career* navigation heading.
- **Prototypes.** At the core of West Monroe Partners' design approach to creating best-in-class designs are its interactive prototypes. These prototypes are published online and accessible to team members 24/7. An interactive prototype is more compelling than a typical static wireframe because it functions very much like a real site. It is also a very effective tool for confirming requirements with system users and communicating those requirements to the technical team. The project came to life when the team reached the prototype phase and tested these designs with real users. The UX and technology specialists began designing the site structure, navigation, and page layouts, then filled them in with features based on personas and priority. Tremendous thought and discussion went into positioning items on the page and determining the content flows. Using Axure (a digital prototyping tool), they created connections between the various buttons, links, and pages to provide the flow of a nonlinear experience. The AMA's marketing team provided sample content and imagery. This approach allowed the designers to present features using the personas as the lens through which to tell a story about how functions would work. They were then able to rapidly update (or iterate) the prototype to reflect feedback; this helped them remain focused on creating a system that employees desired and leadership valued, and was also feasible from a technology standpoint.

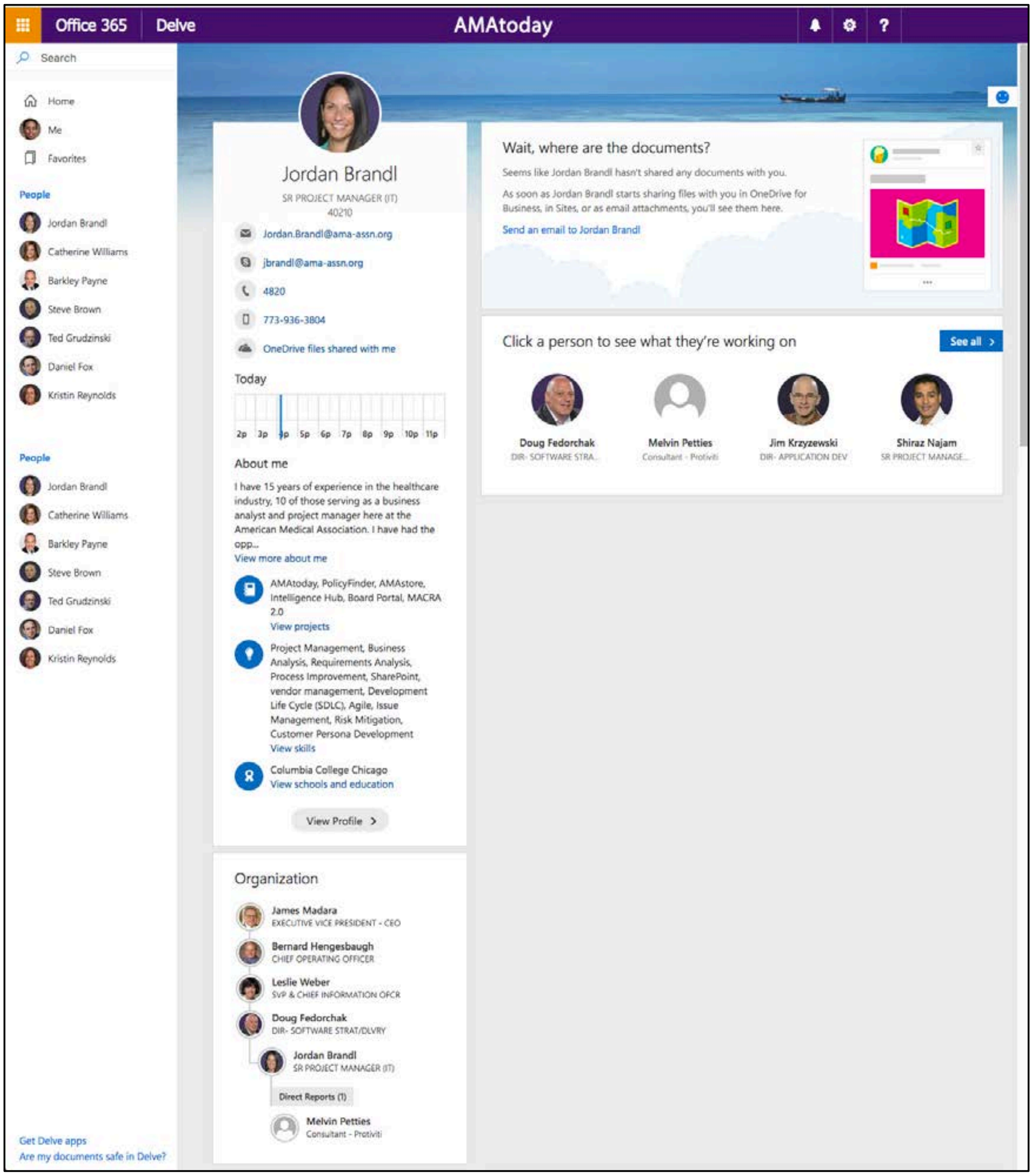


Image 8. AMA Intranet Employee Profile. The employee profile page (standard SharePoint functionality) includes a search sidebar to find other employees. *Contact Info* and *About Me* give employees basic information on the person's job functions and contact information. Project lists show the person's involvement in initiatives, while the skills and expertise areas provide searchable tags that let users find similar expertise across the organization. *08_AMA_08_Employee_profile_page.png*

Information Architecture

As mentioned above, the team used card sorting to determine content placement based on specific user needs. The market research team then initiated online tree test studies with employees. The objective was to determine whether or not users could find content using the new IA. The online study asked AMA employees to use a hierarchy ("tree") of topics and subtopics when locating specific content or completing certain tasks (depending on the respondent's persona).

The respondents included representatives from each of the target personas: new hires, connected employees, efficient employees, and content authors. The tree test's results demonstrated that all personas generally had the least trouble finding content related to news, organizational charts, and business units. Some, especially the new hires, encountered difficulties with the placement of *Top Links* content and with the language used to describe some content in the main navigation menus. The results were used to modify content placement and the content descriptions.

The new IA was also included in the prototype so users could see how the new megamenu would look and work.

The team learned a valuable lesson from their IA design efforts: don't underestimate the effort and analysis required to create an intuitive IA and navigation. For example, a new hire looking for payroll functions might be inclined to look in the intranet's HR section, but what if that function is technically within the Finance department's purview? As this small example illustrates, it is important to design IA based on how employees think, not necessarily how an organization is structured.

Getting Buy-In

Several efforts were aimed at gaining buy-in from across the organization. First, the team conducted a pre-initiative employee engagement and satisfaction survey to solicit feedback and establish a baseline for the future platform. Next, it engaged employees from all business units to participate in discovery sessions. This helped the team capture the voice and convince employees that the intranet design team was in fact listening and responding to employees' needs as they designed the new site.

The team also created a steering committee comprised of key leaders from the Communications, IT, HR, and Finance units. This ensured representation from the operational units with a stake in facilitating the site goals, enabling the new platform's creation, and owning and supporting AMAtoday in the future.

Another key to successful adoption was an integrated communication plan that was introduced well ahead of the launch. This plan included a video and internal ad campaign featuring "Mean Tweets" — that is, verbatim comments about the old intranet taken directly from a preliminary employee survey. In these video segments, AMA leadership read the unfavorable employee feedback about the old intranet, cleverly delivering a clear message: "We have heard you, and the new AMAtoday is coming."

Print ads outlined the site's new features and functionality. On launch day, December 1, 2016, the intranet team hosted an all-employee open house, with snacks and a fully staffed information booth to help employees log on for the first time. The launch events also featured interactive contests to help employees discover the new platform's features and content. The goal was to get users comfortable by breaking the ice on the new site. Those who stepped up to the challenge (more than 300) won AMAtoday swag. These early efforts were key to generating early user adoption and increasing the average daily use to better than 50%.

GOVERNANCE

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
AMAtoday Steering Committee (senior management in Communications, IT, HR, Finance)	• Champion the platform • Prioritize future features and functionality
AMAtoday Product Owner and Manager	• Reinforce site governance • Create editorial content • Curate the 18 business unit pages and all homepage content • Prioritize future releases • Serve as chief editor • Assist in training content managers and authors • Integrate Employee Communications channels to push users to the site
AMAtoday Content Managers (18)	• Represent business units' roles and priorities in pursuing the AMA mission
AMAtoday IT Support Staff	• Provide guidance for platform technology capabilities • Develop new features for maintenance releases • Provide support and training for employee inquiries related to site functions and features

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://amatoday.sharepoint.com
Default Status	AMAtoday was set as the default homepage in IE for 30 days after launch; users were then allowed to change their default homepage.
Remote Access	• The application is cloud-hosted using the Microsoft Office 365 platform. • Users can log in using their corporate credentials from any location with internet access. • Office 365 credentials are federated with the on-site identity provider using Azure Active Directory and IBM Tivoli.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2005	• Launch of old AMA intranet
February 2016–May 2016	Research, design, and development activities for new intranet, including: • Content assessment • Requirements gathering • Product backlog • Development of employee personas • UX design • Visual design • Functional and technical design • Content and technical governance planning • Office 365 tenant setup and configuration
June 2016–November 2016	• Build and iterative user acceptance testing sprints • Content mapping and content creation • End-to-end performance testing and page tuning • Final user acceptance testing • Change management • Launch preparation
December 2016	• Launch of AMAtoday

CONTENT AND CONTENT CONTRIBUTORS

Content Management Team

The AMAtoday content management team consists of 18 content managers representing each of the groups listed under the main navigation's *People & Teams* section. Content managers serve as the first point of contact for their respective business unit and as a liaison to Employee Communications. They also oversee their respective business unit pages and content, apply processes to ensure consistency across the platform, and leverage opportunities to share the business unit's story and messages.

Specific responsibilities include:

- Identify topics of interest to all employees and collaborate with Employee Communications to incorporate the topics into the AMA editorial strategy (e.g., leadership perspectives, spotlights, new stories, communications briefings, signage)
- Serve as an ambassador to AMAtoday and help business unit staff members utilize the platform
- Update business unit news on a regular basis and identify opportunities to promote content up to the AMAtoday homepage
- Train content authors and business unit contributors to use AMAtoday's self-service functions
- Ensure all business unit content, including announcements, events, descriptions, and sublevel, are 100% compliant with the AMAtoday style guide
- Work with content authors to correct any errors and to ensure content adheres with the AMA brand voice and style guide
- Seek collaboration on *MyConnection* and other Employee Communications amplification opportunities as measured by quantity and quality of announcements and relevance to all AMA employees
- Attend content manager monthly meetings
- Meet digital calendar and *MyConnection* submission deadlines

In addition to the business unit content managers, the site's hybrid governance structure includes content authors who oversee content for a specific team, project, or program.

Senior leaders of each business unit chose the authors based on their expertise (in communications, marketing, publishing, etc.) and on key characteristics, including being collaborative, diplomatic, and self-starters; willing to expand their current skillsets; and having strong writing and editing skills (including familiarity with *AMA Style Guide* and *Associated Press Stylebook*) and intermediate knowledge of the Microsoft Office Suite.

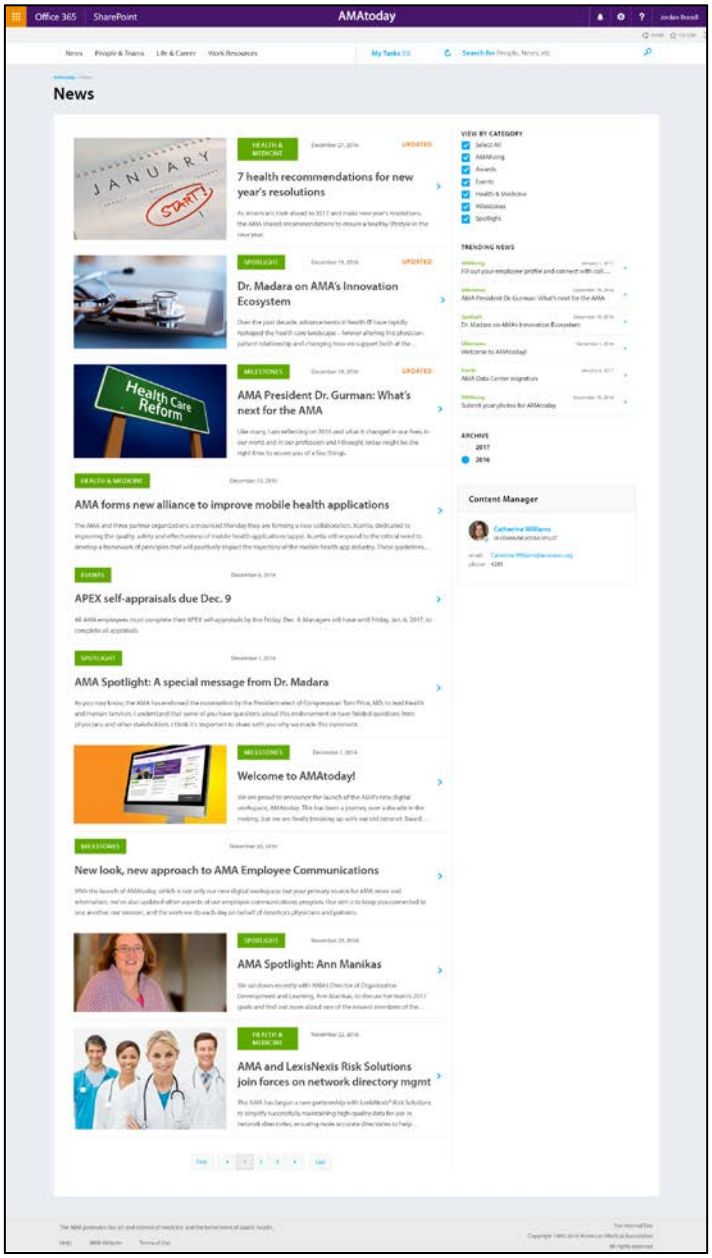


Image 9. AMA Intranet News View All Page. News articles include published date, green category tags, and orange *Updated* and *New* tags to help users identify what this article is and when it was published/updated. Category tag filters let users filter by the green tags. *Trending News* uses SharePoint's popularity metric to pull articles with more recent page views, and the archive filter lets users look at articles by year. Pagination is included at the bottom so users can page through to older articles. The *AMA News* editor is listed in the *Content Manager* widget with click-to-contact capabilities. *09_AMA_09_News_ViewAll.png*

Culling Content

When the project began, the existing intranet had more than 27,000 pages, many of them created at least five — and as many as 12 — years before. That total also included many orphaned pages that weren't discoverable via search and were not linked to other pages.

The team assessed content based on the following criteria: age, analytics, relevance, and strategic priority. That information, combined with employee traffic (where available), provided a good starting point for reducing content.

Team members also took other steps, including bundling various policies and procedures into single documents. They continue to refine this approach, but it has already helped to reduce and centralize hundreds of previous pages that applied to single organizational procedures.

After reviewing content and removing any extremely outdated pages, the team created a grid of the most-visited pages based on Google Analytics and pages that were rarely visited but potentially important to various business units or key topics (such as committees and clubs, and employee discounts). Next, team members engaged each business unit in the process, meeting with content managers and key experts from all 18 units. Using the newly created business unit page template, they assessed each unit's current content to decide what to directly migrate, revise, add, or remove. Then, they provided the business units with a framework for their new pages and the content/design requirements (such as word count and design limitations for each module).

Another important part of this process was assigning ownership for previously un-owned pages, such as locations, AMA partnerships, and onboarding. Connecting and empowering internal experts to maintain/invest in these pages was part of enforcing the hybrid governance structure. All of the content removed from the site was placed in a content library. Content managers worked with the Employee Communications team and key business unit contributors to revise their information. All content received final review and approval from business unit leadership. It's important to note that this process of content review/revision/enhancement is never finished. The team continues to revise and add pages to the site, while adhering to the new site guidelines created as part of this project.

CONTENT DEVELOPMENT AND OVERSIGHT	
Encouraging Contribution	• The team hosts monthly AMAtoday Content Management team meetings, during which it shares technology updates, brainstorms new editorial ideas, and reinforces governance and channel deadlines. These efforts encourage contribution. In addition, the content manager job description (see above) outlines standard expectations for the position and for maintaining current, relevant content on the intranet.
Training	• The AMA Employee Communications team hosts monthly training for content managers and authors. Additionally, the intranet team created a *Content Guidelines and Procedures Playbook*, as well as a flowchart (see below) to help the content team communicate about the new publishing process and how employees can engage with Employee Communications channels.
Maintaining Quality	• The team uses Employee Communications channels (digital signage, e-newsletters, and the intranet) to solicit feedback from employees to a proxy mailbox. It also conducts an organization-wide survey to gather feedback and generate ideas for improvement. Contact information for the platform's owner is available on the AMAtoday homepage. • The design team has also designed accountability into the page templates. Almost all pages include the content manager's name and contact information (including a link to employee profile, title, email, and phone number) and "content last updated: [date]." This lets employees know how fresh a page is. These UI elements have motivated content managers to own their areas of the intranet and keep them updated. This functionality and accountability was not available in the old platform and was one factor that led to page bloat.

AMAtoday Content Guidelines and Procedures

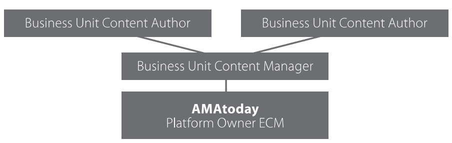
Content Author(s) (Business Unit)

- Owns and manages content on their respective Business Unit subpage
- Works with their Content Manager to identify and feature Business Unit content that is applicable to all AMA employees
- Requests Business Unit content to be featured on the home page when applicable

Platform Owner (ECM)

- Develops content for the AMAtoday home page
- Manages the site to discover and address inconsistencies (per Content Playbook guidelines)
- Seeks and implements integration among AMA's digital channels
- Reviews submissions from content authors and content managers to curate content for the home page or OneAMA calendar

AMAtoday: Hybrid governance model



The Business Unit pages will be reviewed and mapped in partnership between ECM and the Business Units. Maintenance of these pages will be managed by Business Units within the governance guide and with editorial guidance from ECM.

In a hybrid model of intranet content governance, the Platform Owner oversees policies, procedures, and compliance while Content Managers govern their individual department's Content Authors.

Technical support for AMAtoday will be provided by our Information Technology department. All issues and requests should be sent to support@ama-assn.org. Editorial issues or requests should be sent to the Employee Communications team at employee.communications@ama-assn.org.

Forms Center requests should be sent to our IT support team at collaborationsupport@ama-assn.org.

Tagging and metadata guidelines

Tagging and metadata creates a content map within the intranet site that will make the search function robust and connected and therefore increases our colleagues' efficiency and helps us connect the dots.

Content authors will be asked to include tagging and metadata in all content, which will be important for items like cross-site announcements/calendars and search. The tagging and metadata is set at a global level so authors will be asked to adhere to the following enterprise-wide tagging structure:

Events

- All employee
- AMA Exhibits and meetings
- BOT and leadership
- Charity/Jeans Day
- Federation events
- Holidays and payroll
- Training
- Wellness

Announcements

- Benefits
- Reminders
- Special events
- Training and performance
- Wellness

The creation of new tags or edits to alter an existing tag will be approved by the AMAtoday Steering Committee to ensure proper governance.

The following core metadata is captured via auto-tagging in our content management system:

- Created By
- Created Date
- Modified By
- Modified Date
- Division/Department/Functional Area

Additionally, a version history is tracked for documents with the ability to revert to a previous version.

American Medical Association 10

This page is an example from the *Content Playbook* tool, which the team designed to guide content owners and outline best practices for future intranet content planning, creation, and oversight across the new intranet.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Office 365/Azure/cloud
Bug Tracking/Quality Assurance	• JIRA
Design Tools	• Axure/Sketch/Invision
Site Building Tools	• Custom deployment tool built using SharePoint Patterns & Practices toolkit (https://github.com/SharePoint/PnP)
Content Management Tools	• SharePoint Online
Search	• SharePoint Online
Other Functions	• In-app instant messaging integration with Skype
Workflows & Forms	• Nintex Workflows Online • Nintex Forms Online

The tech team knew it wanted to use the SharePoint platform for the new intranet, but it had to decide whether to implement the new intranet on SharePoint 2016 on-premise or move to the cloud and use either SharePoint Online with the standalone plan or go with the full suite of Office 365 and SharePoint Online. The process of determining which of these paths to choose began in the discovery phase; a critical tool the team used to help make the decision was a matrix that compared each option's pros and cons against four key factors:

- **Investment:** What is the cost for licensing, infrastructure, etc.?
- **Set-up time:** How quickly can the environment be ready?
- **Scalability:** Will the platform easily scale to support further extensibility for later intranet phases?
- **Cloud roadmap:** Is there a future vision to migrate on-premise services and infrastructure, such as email (Exchange Server) to the cloud?

Working with the internal AMA team, the WMP technical team ultimately decided that the best approach was to move forward with E3 licenses in Office 365, but roll out only SharePoint Online and Delve.

This decision was heavily weighted on the AMA's cloud roadmap. Existing SharePoint sites that many employees used daily were hosted on aging SharePoint 2010 and SharePoint 2013 servers. The intranet redesign was seen as an opportunity to show innovation and kickstart the AMA's cloud strategy.

Customizing Office 365

The intranet is highly customized but also uses core aspects of the Office 365 platform. At the project's outset, the team knew it wanted to implement a design that retained the AMA's highly visual brand, but still keep it within the bounds of the SharePoint Online platform. The team also knew that it wanted to leverage the new intranet to modernize the forms process for employees by moving away from paper forms with hard signatures to digital forms with automated workflow processes and digital signatures.

For the visual design, the customization was done using client-side code (HTML, CSS, JavaScript) and standard SharePoint components such as lists, customized page layouts, pages, content editor web parts, and various APIs for retrieving page content programmatically. The forms and workflow customization was done using the Nintex Forms and Nintex Workflows third-party tools, with customized CSS to carry over the branding from the intranet onto the Nintex forms for a consistent look and feel.

In addition to branding and forms, the team also customized the platform's integration with Skype for Business on-premise. Whenever a person's name or picture appears on the intranet, it includes a button to directly IM that person on Skype for Business. Because the AMA was rolling out Skype for Business and the new intranet simultaneously, it wanted to ensure the two systems were integrated.

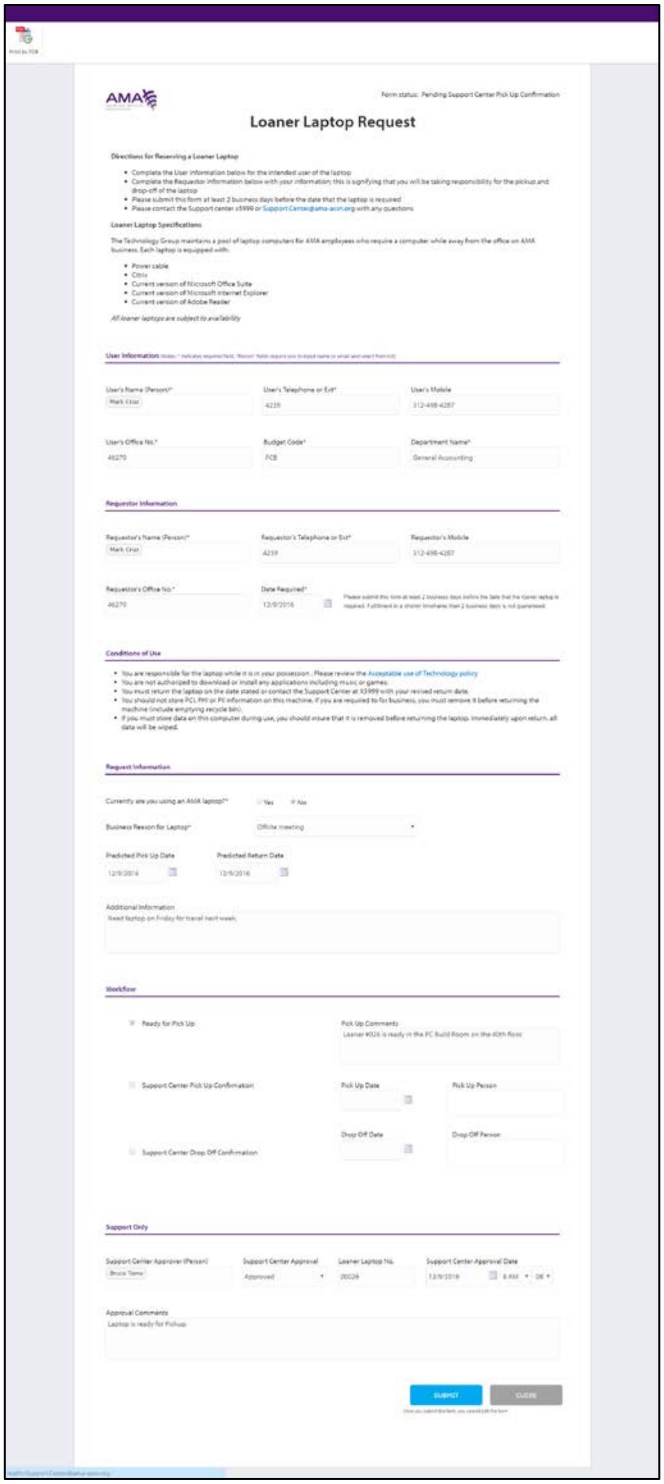


Image 10. AMA Intranet Web Form. An example web form created using Nintex with custom UI development. Forms use the same web font as the rest of the AMAtoday site. The AMA logo is consistent on all web forms, and form status is shown at the top right. People pickers are used for all fields that reference AMA employees. Fields locked based on the form's status are denoted by grayed-out boxes, and date fields have date selectors. Approvers are allowed to select only themselves (login validated). When approval is selected, the approval date is auto-populated. *10_AMA_10_ExampleForms1.png*

ROI

Since launching its new intranet, the AMA has taken an active approach to measuring both metrics and user satisfaction. The organization does not track dollar-based KPIs, but it has established clear metrics against each of its primary goals.

KPIs

During a planning presentation at the project's beginning, team members told the AMA C-Suite executives that if 40% of employees were using the platform daily in the first quarter after release, the organization should consider the effort a success. As a point of reference, 4% of employees used the former platform on a daily basis. Based on current analytics, at least 54% of employees (more than 532) now access the platform daily.

Other notable before-and-after gains include the following:

- **Increase in employee engagement and satisfaction.** The baseline for this goal was based on adoption (daily use) and results of a future survey (see softer measures below). As noted above, the previous platform's adoption was 4%. The project goal was to increase that by 20–40%. Based on Google analytics data, an average of 532 users, or 54% of employees, now use the site daily.
- **Increase in employee self-service engagement.** The team has three primary KPIs for this goal:
  - **Reduction in time spent populating key forms.** The baseline was 10 minutes per form and the goal was to reduce this by 20%. Currently, users spend an average of 2–5 minutes per form — a reduction of at least 50%. With thousands of forms populated to date, hundreds of hours of employee time have been saved**.**
  - **Reduced IT support center calls.** The baseline was 1,800 calls and emails per month, and the goal was to reduce this by 10%. Today, there are an average of 1,438 calls and emails per month, representing a 19% reduction in call center calls.
  - **Reduction in enterprise internal emails.** The baseline was 7,500 internal emails sent per month (by the top 50 senders), and the goal was to reduce that by 10%. Today, the top 50 users send, on average, 6,231 internal emails — a reduction of 19%.
- **Connect employees.** The baseline was 330 monthly page visits to four business unit pages; the goal was to increase page visits to other business units by 50%. Today, the 18 business unit pages have received more than 10,000 total page visits — a 3,900% increase.

- **Serve as an information gateway.** The baseline was a 9% click-through rate from the intranet to other AMA business tools, and the goal was to increase that by 20%. Today, the click-through rate to the top five business tools (including time entry, wellness program, career planning and jobs board) has increased by 32%.

Softer Metrics

In addition to measuring numbers, it's also important to measure user satisfaction, which the AMA team also has done.

In June/July 2017, seven months after launch, the team surveyed all AMA employees about AMAtoday and Employee Communications channels. The objective was to solicit feedback on the new site and identify any areas for improvement. Nearly 300 employees (one quarter of all employees) provided feedback; the results revealed that satisfaction with the site has increased compared to the previous version. Further, a regression analysis of the survey data revealed that the two factors predicting overall satisfaction were the site's ease of use and the content's timeliness.

The preliminary findings include:

- **Users are satisfied.** Two-thirds of employees are satisfied or very satisfied with the new platform.
- **Satisfaction grows with frequency of use.** 82% of employees who use the site every day report that they are satisfied or very satisfied.
- **Content is perceived as valuable.** When asked about the site's content, 74% of employees said the content was valuable and 50% said it is "necessary for conducting day-to-day work."
- **Content is good quality.** More than 80% of respondents said the content is good, very good, or excellent.
- **Site use spans several tools and functions.** Respondents reported using AMAtoday to access tools for time reporting (69%), to keep up on what's happening at AMA (60%), and to search for a colleague using the org charts (53%).

Collectively, these results indicate that AMAtoday has helped bring the association into the modern digital age, with a platform that enables an efficient, connected, and collaborative digital workplace. The project replaced 27,000 pages of outdated content with 120 pages of fresh, regularly updated content that is relevant to users and reflects the association's smart, focused, collegial personality. The team will also use these findings to prioritize future improvements.

In May 2017, AMAtoday received a Golden Trumpet award from the Publicity Club of Chicago in recognition of its innovative format and capabilities as one of the AMA's primary internal communication channels. In June 2017, the site received an Award of Excellence from the Public Relations Society of America's Chicago Chapter. The project has also been selected as a finalist for the PR News Platinum Awards in the Employee Relations category.

LESSONS LEARNED

AMA team members share some lessons they learned and some advice for other intranet teams:

- **Start the content review process early.** "A good lesson learned from the team's content process is: *start early*. This process is time consuming and requires significant time and attention from busy internal partners. Content assessment will be a new process for most business units, so create a structured, organized process with firm deadlines. Your site will only be as good as how relevant your content is to your audience. To reduce pages, create parameters for what constitutes a subpage and urge your content team to keep their copy concise without losing substance. Don't reinvent the wheel; link directly to external resources, such as your corporate website." (Alex Foucre-Stimes, West Monroe Partners, UX Lead)
- **Involve the wider team in technology decisions.** "Our core AMA team did not have any input in the organization's decision to implement Office 365. Our staff was not familiar with Office 365 and was challenged to support the technology requirements for launching AMAtoday organization-wide (e.g., Seamless log in, Delve profiles). In addition, our staff did not have the same level of control over the Office 365 implementation that it did with the previous on-premise SharePoint application. This added risk to the project and resulted in frustration when we were not able to make changes or support production issues." (Jordan Brandl, AMA, Senior Project Manager, IT Development Apps and Strategy)
- **Change management is essential.** "It is essential and it is important to plan for the substantial amount of time required to accommodate change management. For example, it has been difficult to get senior management to support the hybrid content governance approach. This has required the platform owner and manager to invest more time than anticipated in order to instill the new norms and to develop individual business unit's value-propositions and visions for their pages within the site." (Kristina Goel, AMA, Director, Leadership and Employee Communications)
- **Content managers are an essential part of the redesign process.** "We identified content managers at the time we assessed and developed content. In hindsight, we should have engaged them earlier in the initiative and treated them more as partners than as stakeholders." (Goel)
- **Keep an eye on projects that might compete for resources.** "We learned that, for success to come early in the process, it is important to be aware of any competing enterprise-wide initiatives to ensure change readiness and adequate resources for supporting the launch." (Goel)

Best Practices

The team also offered the following advice on best practices when starting a redesign project:

- **Take a new hire's perspective.** "Favor the viewpoint of new employees, as the digital workplace will play a key role in successful onboarding and in enabling them to be effective in their roles early on."
- **Engage people across departments.** "Form a cross-department product team comprised of people who can make decisions related to product and content."
- **Focus on needed functions.** "Make sure the platform connects employees with functions they need (benefits, support centers, payroll). Following organization structure is not always the most intuitive means for guiding users to that content."

Archer Malmo

OVERVIEW

COMPANY

Archer Malmo is one of the largest independently owned, full-service advertising agencies in the US.

Headquarters: Memphis, Tennessee

Company locations: Memphis, Tennessee, and Austin, Texas

Locations where people use the intranet: Memphis and Austin

Annual revenue: $26M

THE INTRANET

Users: The intranet is used by and built for every department across the agency to help staff members be more efficient, consistent, and knowledgeable.

Mobile approach: Responsive web design

Technology platform: WordPress

TEAM

Design team

Project Leadership: David Sparks, UX Architect; Justin Dobbs, VP, Group Creative Director; Robby Grant, VP, Digital Development & Technology; Tyler Watkins, Digital Project Manager

Design: Brian Dixon, Senior Art Director; Gabe Martin, Associate Creative Director/Digital; Ben Colar, Associate Creative Director/Art Director; Ben Hampton, Senior Art Director; David Sparks, UX Architect

Content: Brian Dixon, Senior Art Director; Trish Swope, Director of HR; David Sparks, UX Architect; Gary Backus, Principal, Chief Creative & Strategy Officer; Amy Beth, Director of Communication; Tyler Watkins, Digital Project Manager; Addie McGowan, Senior Digital Marketing Strategist; Mary Lynn Gratzer, SVP, Director of Client Services

Development: David Taylor, Senior Digital Developer; David Sparks, UX Architect; Gabe Martin, Associate Creative Director/Digital; Brian Dixon, Senior Art Director; Joel Gulledge, Digital QA/Email Deployment Manager; Patrick Tamburrino, IT Director; Wil Gatlin, Senior Digital Developer; Cameron Roe, Digital Developer

Human Resources: Trish Swope, Director of HR

INTRANET TEAM

Team members shown here (front row, left to right): Gabe Martin, Trish Swope, Brian Dixon, Ben Hampton, and Tyler Watkins; (back row, left to right): Cameron Roe, Robby Grant, David Sparks, Joel Gulledge, Ben Colar, and Wil Gatlin; (not shown): David Taylor, Justin Dobbs, Gary Backus, Amy Beth, and Mary Lynn Gratzer.

HIGHLIGHTS ABOUT THIS WINNER

Having tools to share knowledge, presentations, and client information inside an advertising agency is not just a nicety — it's a necessity. The Archer Malmo intranet, *Inside Archer Malmo*, is chock full of these valuable assets, including information that makes it easy to find the right people and find answers to common questions.

The goal of Inside Archer Malmo is thoughtful and well defined; it aims to "democratize and centralize our combined knowledge, as well as to provide a single resource for information our employees need." The team behind this project met and exceeded this goal, providing an intranet with a fun voice, tools that encourage information sharing, and many ways to collect feedback from employees. The intranet has many other standout features, including:

- **Simplified pages.** Most pages have one main topic (or a few main topics) and showcase those alone. For example, the simplified homepage focuses on top tasks, and isn't cluttered with much else.

- **Consistent branded colors used effectively.** Designers use typeface and color successfully to indicate information hierarchy. The large, bold orange headings combined with black text somehow manage to look fun and elegant, and nothing like a Halloween skin. White page backgrounds for content sections are easily distinguished from the dark gray backgrounds used at the top of pages and in the fat footer. These obvious background changes help users quickly scan and ignore sections they are not interested in at that moment. Demoted text, such as status, are displayed in a light gray — still visible, but understated.
- **Cheeky tone of voice.** Like the colors, the words used are often fun and gently sarcastic.
- **Navigation and search.** Even with simplified pages, the global navigation and fat footer are always available to advertise features and act as a safety net for users who are unsure of what to do next. On each page, the search field means employees can find anything from anywhere on the intranet.
- ***Employee Asked Questions* and topics pages.** These wikis help employees share knowledge and search for and find information without having to hunt for the right person to ask or the right database to gain access to.
- **Lunch orders.** This tool does more than just get food to employees; it's a killer app that brings many people to the intranet daily or weekly. Getting people to open the intranet for something they want — like lunch — can also encourage them to use it for other things they need for work.
- **Good forms.** So many forms in the world are missing descriptions or have descriptions spread across intermittent pages (in too many steps). But not on Inside Archer Malmo. When collecting information, forms include a quick description of what is desired, examples, and a call to action. The form fields themselves are on the same page as the description page, so no need to click again and again to get to the place to type.

BACKGROUND

Archer Malmo employees need a variety of files, tools, information, and answers to questions on a daily basis. The company had become overly reliant on emails, which over time became repetitive and cluttered workflows. The company also needed a knowledgebase that could provide the answers and information employees need and routinely ask for, including wiki functionality that would empower internal experts to contribute content that benefits everyone. This information ranges from the most up-to-date PowerPoint or Word templates to historical information about the agency's relationship with a particular client.

When hatching plans for a new intranet, the company knew that providing HR information and technical support was a given, but it also wanted to go further and create something more scalable and flexible that would accommodate its needs going forward. In 2015, the company opened a new office in Austin, Texas, and its creative department began building new brand guidelines to update the look and feel and refine various brand assets. The company thus saw a window of opportunity to finally create a useful intranet that would serve the organization now and into the future.

At that time, the company's existing intranet was being used only to place lunch orders for the Memphis office; previous attempts to create a wiki/knowledgebase type site had stalled.

In Q4 of 2016, company leaders began discussing a redesign for the public-facing website and it quickly became clear that many of the needed tools would be best served from an intranet platform. For example, they discovered that team members had a very hard time accessing information about specific clients. To do this, they had to identify the correct people to contact for the information, and then figure out how best to consolidate all the client's information from sources across the agency.

The solution to this and other information needs was to create an intranet that had client pages with wiki functionality so that subject matter experts could easily add information over time. This approach would not only serve the internal audience of knowledge seekers, but also provide a way to funnel these assets out to the agency's new public website. These ideas coalesced around a knowledgebase wiki site, which formed the foundation of what would become the new intranet. It had a clear mission and roadmap:

- **Goal:** Create a purposeful and helpful intranet, full of resources, information, and tools that all employees need on a daily basis.
- **Challenge:** momentum. David Sparks, the agency's UX Architect, had wanted to tackle this type of project for a few years, but the internal motivation hadn't reached the tipping point to get it going. Once the spark was ignited, however, the team was able to get it up and running in short order. Choosing WordPress as the platform contributed to that momentum. WordPress, for all of its plusses and minuses, was found to be the best option because it's reliable, scalable, documented, widely understood, and easy to work with. What the team couldn't get done with plugins, they were able to custom build.
- **Approach:** The overall goal was to make time-to-launch as short as possible. Getting the intranet replaced quickly was a primary driver because the intranet serves as a content generator for the agency's public site (currently in development), and that project couldn't wait. Also driving the decision to move quickly was the knowledge that any aspects of design or features that weren't perfect could be refined later. As long as the content was ported over, and specific functionality was duplicated, the company would have an improved system on day one. With that foundation in place, it would be easy to add bells and whistles later and get old content updated quickly.

The hope is that over time, the information contained in and on the intranet will continue to grow organically and that the value derived from that will follow.

DESIGN REVIEW

Homepage

Image 11. Archer Malmo Intranet Homepage. The homepage is uncluttered and makes the employees' top tasks easy to find. *11_ArcherMalmo_01_home_live.png*

Homepage Highlights

The Inside Archer Malmo intranet designers took a risk. They chose to offer only a few elements above the homepage fold, including the search feature, main global navigation, and the main content area, which includes only six large boxes with icons and a small amount of text. Their bravery paid off. The reason this design works so well at Archer Malmo is because the included items happen to be among the most important things to the employees and to the business. Making these items the only content on the homepage focuses employees on what matters most. Also, offering prominent search allows people to find anything else they have come to the intranet to find. Finally, showing the main navigation advertises what else is possible.

1. **Global navigation.** The global navigation links appear horizontally across the top of the page, advertising what the site offers.
2. **Search field.** The site's search appears below the links, and the large white box pops visually on the dark background.
3. **Task icons.** The icons for the six top tasks are given prime real estate just below the navigation links and search. Each area includes a call to action in large, bold orange text on a white background. Below each call is a simple explanation of the section and a link whose clickability is communicated by its blue text.
   - ***Get IT Help*.** Employees can quickly request help for their computer, phone, and other systems.
   - ***Order Lunch*.** Employees in the Memphis office can take advantage of a convenience: ordering lunch for delivery that day.
   - ***Give a Hi-5*.** Employees can commend coworkers on a job well done. Including this call to action on the homepage encourages participation. As a reward, people mentioned in Hi-5s are entered into a drawing to win small gifts during large agency meetings.
   - ***AM Brand Guidelines*.** Brand guidelines are important for consistent communication with clients. This section helps employees produce and manage their digital assets using the recommended media and best practices.
   - ***AM PowerPoint*.** All employees can locate and download PowerPoint templates. This eliminates the need for employees to request and share templates via email, and lets template creators quickly and easily update the templates.
   - **Social content.** To encourage a rich pool of suggested content for Twitter and other social channels, this icon links to the social form that lets employees share their ideas and suggestions for Tweets and more.
4. ***Announcements*.** The main section below the fold houses company announcements and is clearly labeled as such. Each announcement title is in large, bold orange text, in keeping with the site and

homepage style. Below the title are the author, date of publication, number of comments, and an edit icon, followed by the first part of the announcement, which offers a good taste of the topic.

5. **Right rail.** To the right of the announcements are short lists of recent posts and comments. This section also includes links to archived announcements and a *Categories* section listing popular topics that users can select to sort announcements.

6. **Footer.** The footer is delineated with a gray background and white text. The orange touches help the section match the rest of the page's style, while the dark background distinguishes it as a separate section. The leftmost footer column repeats the global navigation links, giving users another chance to find their topic. Below these lists are a site map, links to applications that employees use (such as expense reporting, time sheets, Basecamp, and Paystubs), and a link to the public-facing website. The other three columns in the footer include the latest company-related posts on Facebook, Twitter, and Instagram. These allow employees to see what's happening in Archer Malmo social channels without having to leave the intranet.

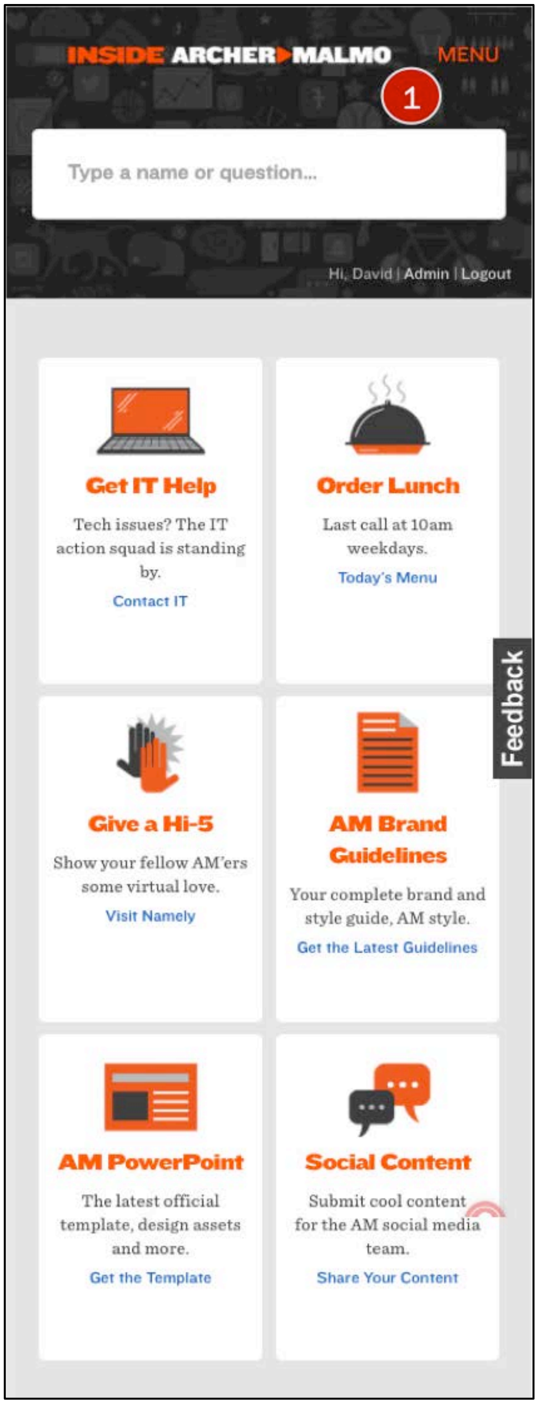
Mobile Homepage

Image 12. Archer Malmo Intranet Mobile Homepage. The Archer Malmo intranet homepage on mobile devices includes the same content as the desktop, but arranges it so it is easy to deal with on a small screen.
12_ArcherMalmo_02_MobileHomeWithMenu_live.png

Mobile Homepage Highlights

The homepage presents the same items on mobile as it does on desktop, but they flow differently (and appropriately) on the smaller screen.

1. **Heading.** The *Inside Archer Malmo* heading remains at the top, as on the desktop.
2. **Global navigation.** The global navigation appears in a vertical list of links that's easier to read than the desktop's horizontal list across the top of the page.
3. **Search field.** The site's search appears below the links, and the large white box pops visually on the dark background.
4. **Task icons.** The top-task icons are given prime real estate below the navigation links and search, but are sized to flow a little differently than on desktop so they fit on the small screen.
5. ***Announcements*.** These have the title, information, and beginning of the announcement, but wrap differently than on desktop.
6. **Footer.** The same elements appear as those on desktop, but the columns drop elegantly and elongate the page.

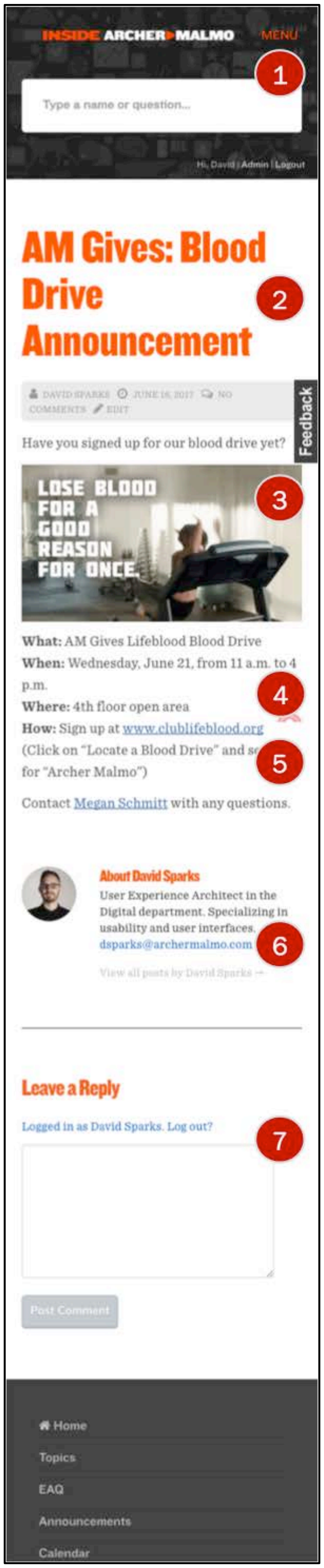


Mobile Homepage, Closed Menu

Image 13. Archer Malmo Intranet Mobile Homepage Menu. The menu link in the upper right (shown here zoomed in) opens and closes the list of navigation links. *13_ArcherMalmo_03_MobileHomePageNoMenu_live_cropped.png*

Mobile Homepage, Closed Menu Highlights

1. **Menu Link.** The orange *MENU* link in the upper right corner opens and closes the vertical links list. The ability to close the menu lets people use the screen real estate for content without having to scroll the links off the screen.



Announcement Page, Mobile

Image 14. Archer Malmo Intranet Announcement Page — Mobile View. Each announcement (shown here zoomed in) is easy to scan, appearing on its own screen on mobile. *14_ArcherMalmo_04_MobileAnnouncementPost_live_cropped.png*

Announcement Page, Mobile Highlights

Tapping an announcement in the list on either the homepage or the main *Announcements* page opens that announcement's page.

1. **Navigation.** Search, the *MENU* link (which reveals the global navigation) and the fat footer remain constant.
2. **Title.** The announcement title appears in large orange letters at the top and is easy to see and read.
3. **Related information.** The author, date of the announcement, number of comments, and editing capabilities appear below the title in a gray banner with gray text; they are visible, but visually demoted.
4. **Image.** A meme related to the blood drive announcement carries a funny message, "Lose blood for a good reason for once."
5. **Information.** The announcement itself includes the basic information and links to related resources, including whom to contact.
6. **Author.** A short author bio and photo appears after the announcement, followed by a link to more of that author's announcements.
7. **Comment.** The large *Leave a Reply* field lets people submit responses to the announcement; these responses typically add information, offer reviews, or ask questions.

Employee Asked Questions

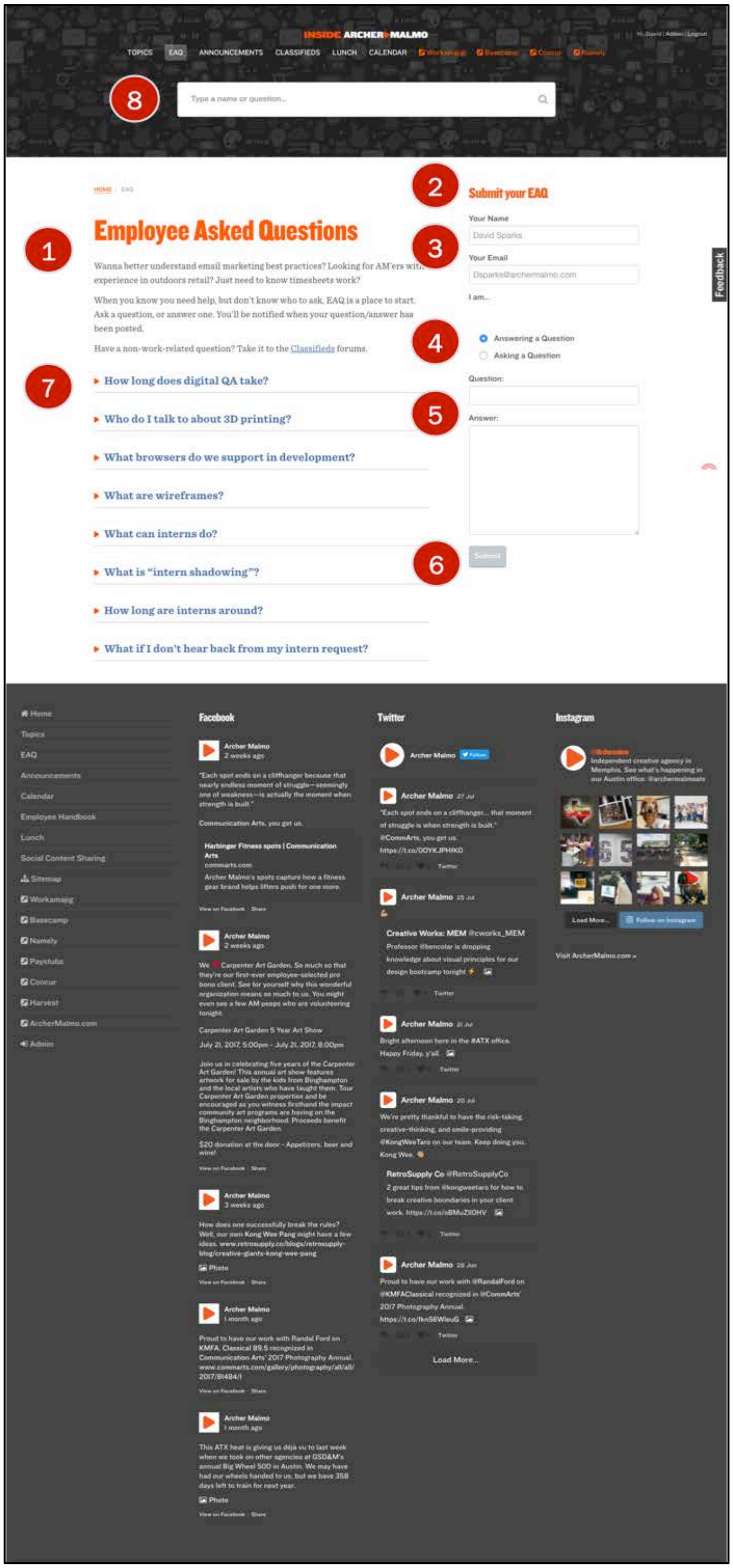
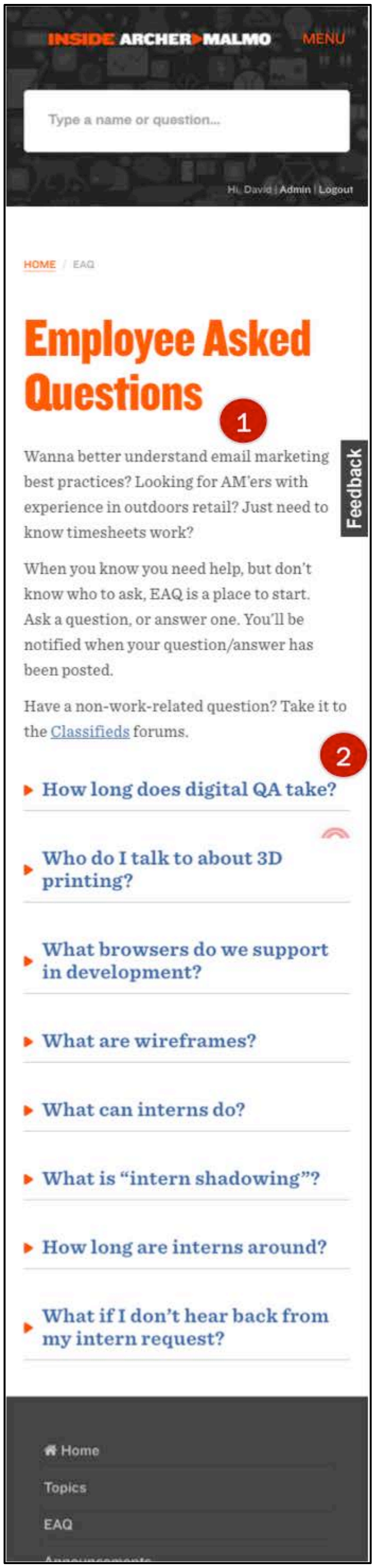


Image 15. Archer Malmo Intranet Employee Asked Questions. The EAQ page lets employees ask questions of one another, answer questions, and read questions and answers. *15_ArcherMalmo_05_FormEAQ_live.png*

Employee Asked Questions Highlights

The *Employee Asked Questions*, or *EAQ* page provides a common place for coworkers to ask, answer, and find answers to questions. This wiki helps solve the problem of employees trying to find the right people to answer their questions. The wiki offers an expected and accessible place — other than email — to consolidate shared knowledge between colleagues.

1. **Explanation.** The first section of the page explains what the feature is by presenting the types of questions a person might ask, then encouraging people to ask questions. It also directs people to the *Classifieds* forums for questions not related to work. Doing this reminds employees that the *EAQ* area is for work-related questions, but that there is also a place they can go for other questions.
2. **Ask questions.** The form for submitting a question appears in the page's right column. *Submit your EAQ* identifies this as the place to write, not just read.
3. **Identifying fields.** The first fields ask for the user's name and email address.
4. **Ask or answer.** The next set of fields asks users to identify whether they are asking or answering a question. Spacing before the two radio buttons makes them easy to see.
5. **Q&A.** The last fields let users type their question or answer.
6. **Submit.** The *Submit* button is easy to see and click.
7. **Questions.** The most recently asked questions appear in an expandable list on the page.
8. **Search.** Users can also search for questions via the site search.



Employee Asked Questions, Mobile

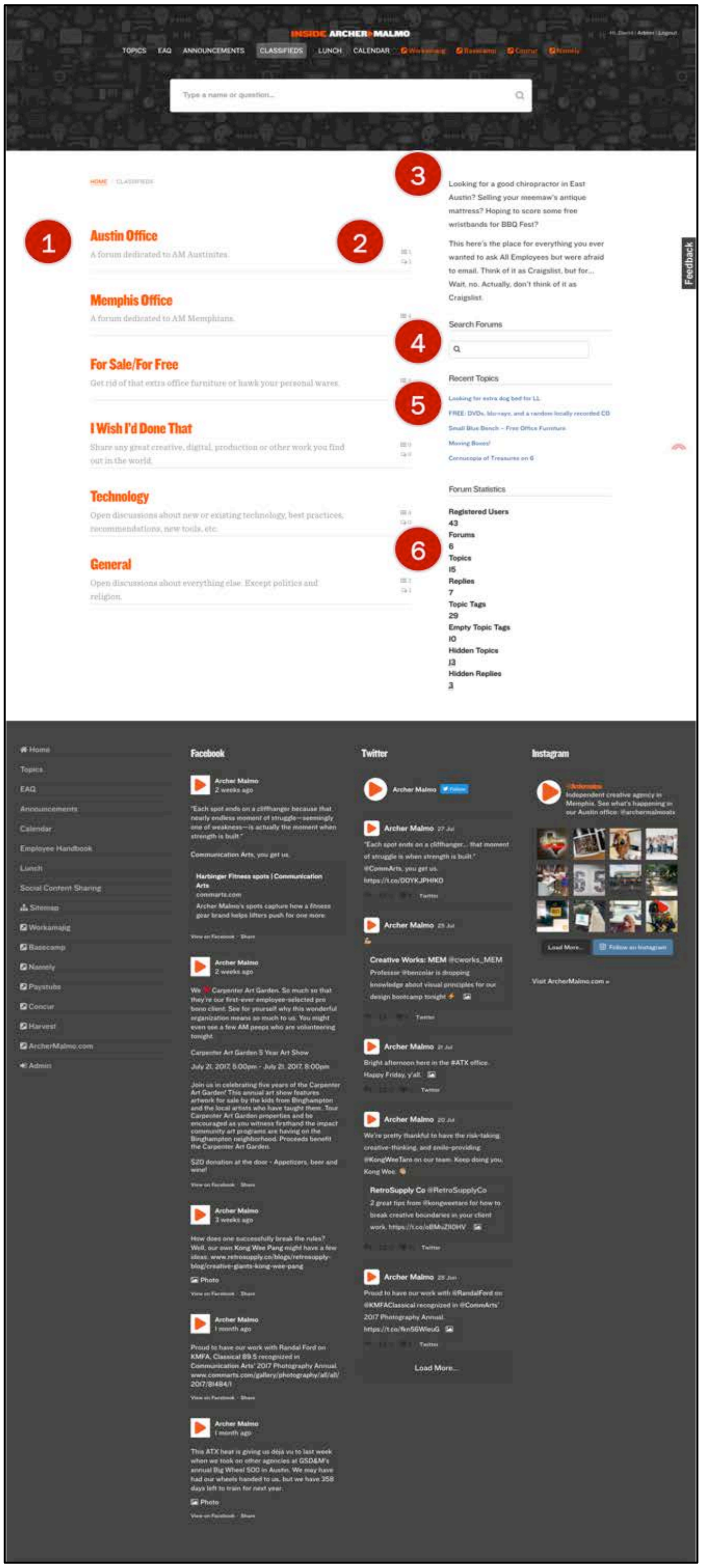
Image 16. Archer Malmo Intranet Employee Asked Questions — Mobile View. The *EAQ* page on mobile (shown here zoomed in) displays the most recent questions. *16_ArcherMalmo_06_MobileEAQ_live_cropped.png*

Employee Asked Questions, Mobile Highlights

The mobile layout of the *EAQ* flows differently from the desktop version, and displays less.

1. **Explanation.** The first section includes question examples and a request for people to ask questions.

2. **Questions.** The question list displays next on the screen. The list is tall and the text is legible, making the questions easy to read and to tap to view answers.



Classifieds

Image 17. Archer Malmo Intranet Classifieds. Employees can talk about non-work topics and buy and sell items in the intranet's *Classifieds* section. *17_ArcherMalmo_07_ClassifiedsEmployeeCommunication_live.png*

Classifieds Highlights

1. **Global** t**opics list.** Each topic is listed and briefly described below its title. The overarching topics are broad and include: *Austin Office*, *Memphis Office*, *For Sale/For Free*, *I Wish I'd Done That* (where people share creative ideas), *Technology*, and *General*. The *General* section notes that discussions about politics and religion are not welcome, helping to keep emotionally charged disagreements out of the workplace.
2. **Activity numbers.** The number of items under each topic and the number of comments are in small gray text on the right, indicating the activity under each topic.
3. **Description.** A slightly mischievous description in the upper right of the page explains that employees can do anything from sell a mattress to browse for tickets to an event.
4. **Search.** An open field lets employees search the classifieds for anything their heart desires.
5. **Recent topics.** Recent posts (here, including someone needing an "extra dog bed for LL") appear as links in the middle of the right column.
6. **Statistics.** The *Forum Statistics* section at the bottom of the right column displays basic statistics, such as the number of users, topics, and tags.

Social Sharing Ideas

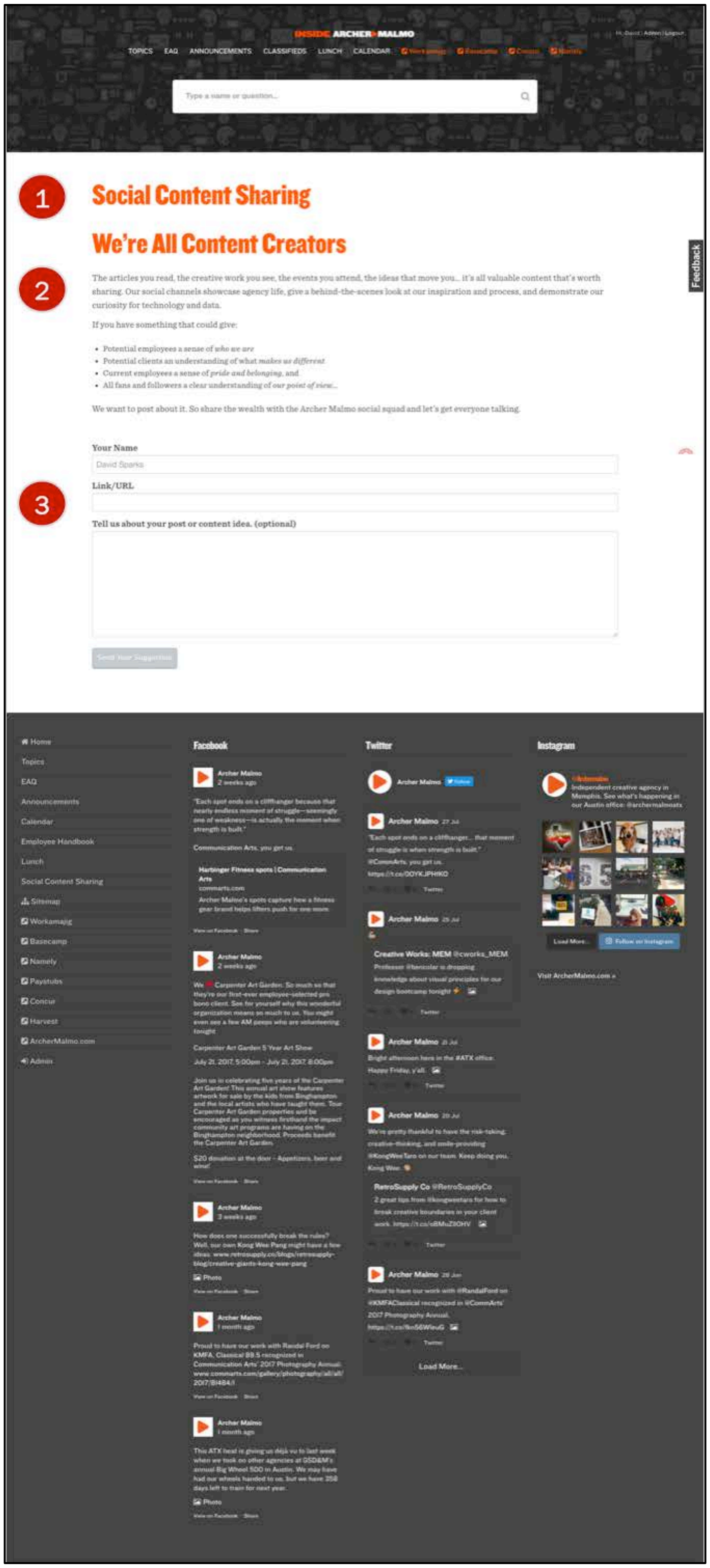


Image 18. Archer Malmo Intranet Social Sharing. Employees can use a simple form to suggest ideas for posts on Archer Malmo's public social channels. *18_ArcherMalmo_08_SocialFeatures_live.png*

Social Sharing Ideas Highlights

Employees are encouraged to come up with ideas for items to be shared on Twitter, Facebook, and Instagram. This not only helps all employees feel included, it ensures a diversity of rich topic options for publishing to the social channels. It also helps the people who post for the organization stay abreast of items that could be interesting to their clients and potential clients.

1. **Title.** The page title communicates the idea: *We're All Content Creators* in the social channels. Saying this right up front lets employees know that deriving social content is encouraged and is everyone's responsibility.
2. **Description.** The description of what employees might suggest includes articles they read, creative work they see, events they attend, and ideas that move them. Below this, the company's target audience for social channels appears in a bulleted list, which further directs employees to consider what readers might want to know.
3. **Form.** The submission form asks for the user's name, a link to the information they propose for sharing, and a larger field with the label: *Tell us about your post or content idea. (optional)* It's helpful to get the employees' ideas about the content they are referring and to allow enough space for them to say as much as they want — but the word *optional* takes the pressure off. If the person simply thinks something *might* be interesting, but they are not sure how to describe why, the *optional* makes it okay for them to post just the link and be done with it. This one word probably helps generate many leads.

Lunch Ordering, Mobile

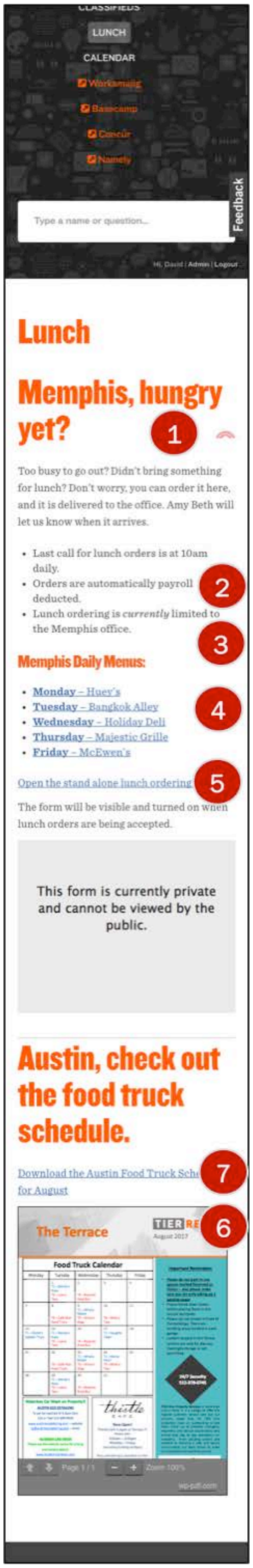


Image 19. Archer Malmo Intranet Lunch Ordering — Mobile View. The intranet facilitates lunch ordering for the Memphis office employees and to serve employees in the Austin office, the food truck calendar is posted until a lunch ordering system can be put in place there. This is the mobile view zoomed in. *19_ArcherMalmo_09_LunchWithMenuMobile_live_cropped.png*

Lunch Ordering, Mobile Highlights

Never underestimate the importance of a full belly, or its impact on employee concentration. With so many helpful features that support the business, perhaps the most cherished one of the Archer Malmo intranet, and certainly the more trafficked area, is the lunch ordering feature.

The *Order Lunch* section owns a prominent spot above the homepage fold. When clicked, it leads to the lunch page.

1. **Description.** For the Memphis office, which has no cafeteria, the description tells users about the service.
2. **Payroll payment.** To make it easy on employees, costs are automatically deducted from their payroll so they don't have to deal with paying each day. This is stated in the second bullet on the page.
3. **Future lunch features.** In the lunch ordering area, it states that "Lunch ordering is *currently* limited to the Memphis office," indicating (through the use of italics) that the service will likely be expanded to the other office.
4. **Restaurants.** The weekdays list offers a link to the menu of each day's restaurant.
5. **Form.** Employees can fill in a form with their lunch order by 10:00 am, when the hunger pangs are just brewing. Browser notifications inform people who ordered food when it has arrived. Similar notifications are also used for "last call" for lunch orders, and other non-lunch urgent announcements.
6. **Food truck schedule.** To serve employees in the Austin office, the food truck calendar is posted.
7. **Download.** Austin employees can download the food truck calendar for the month.

PowerPoint Templates and Assets, Mobile

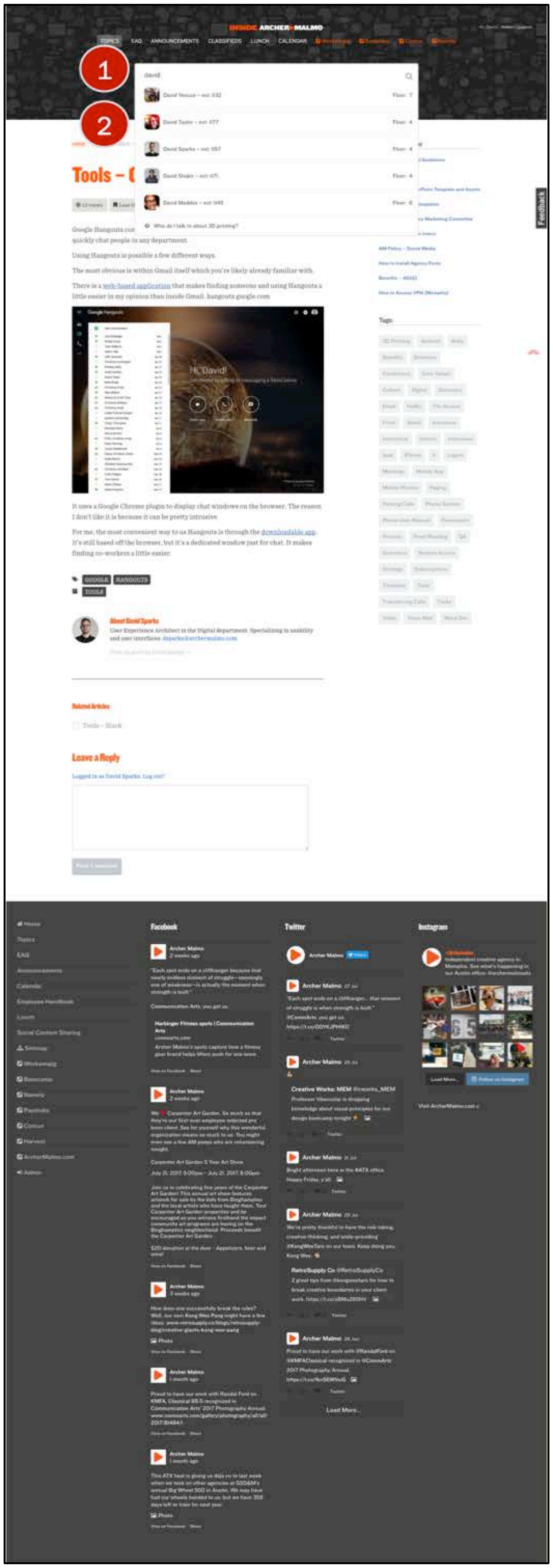
Image 20. Archer Malmo Intranet PowerPoint Templates and Assets — Mobile View. A mobile view (zoomed in) of how employees find and share the most updated templates and client pitches on the intranet. *20_ArcherMalmo_10_MobileSingleTopicContent_live_cropped.png*

PowerPoint Templates and Assets, Mobile Highlights

Because it's an agency, Archer Malmo employees deliver many presentations and documents to clients and partners. Employees learn from one another, and improve decks and documents, so it's important that work and knowledge is shared and carried forward between teams and individuals. However, as at many organizations, locating the most current and approved presentations and documents was a struggle.

To address this, the intranet designers created one place where all employees could find and get PowerPoint templates, eliminating the need to request and share templates via email.

1. **Headings.** Each section with a link to assets is separated by a large, clear heading that users can easily scan.
2. **Links.** Links are consistently presented as blue underlined, making them easy to spot.
3. **Description.** The page's first section explains why it's important to be consistent with branded collateral and pitches.
4. **PowerPoint template.** The first link leads to the sanctioned PowerPoint template.
5. **Assets.** The next section describes and links to additional design assets.
6. **Training.** If the templates alone are not enough, people can get training on using them effectively.
7. **Brand templates.** The other Archer Malmo brand templates are accessible via the final link.
8. **Comment.** People can also comment on the post and make suggestions for updates.



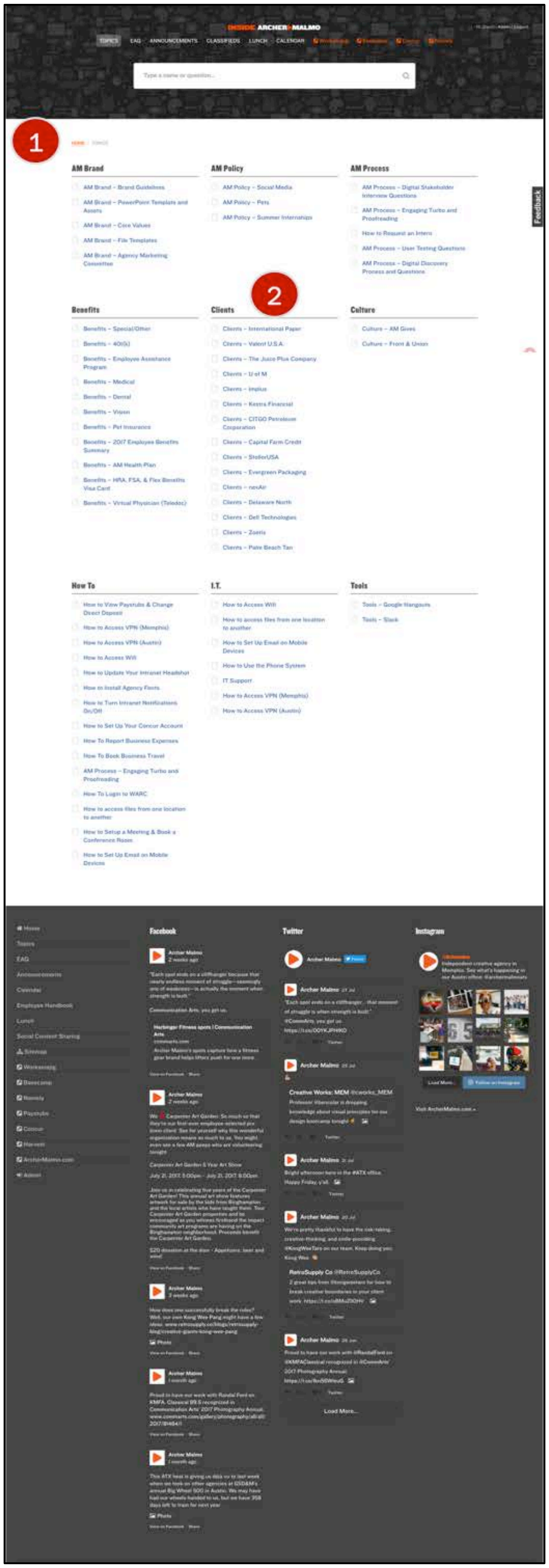
Employee Search

Image 21. Archer Malmo Intranet Employee Search. As the user types a name, live search pops up a list of people with that name. *21_ArcherMalmo_11_EmployeeProfiles_live.png*

Employee Search Highlights

At an agency, being able to reach the right colleagues can ensure that a good client stays happy. Employee search at Archer Malmo makes it lightning-fast to find a colleague's phone number.

1. **Live search.** The drop-down list begins to populate with names corresponding with the letters typed into the site search field.
2. **Information.** For each result, a photo of the person displays for easy recognition. Next is the person's full name and phone extension; clicking the name opens a new browser tab and loads the individual's profile, which is hosted through Namely.



Topics

Image 22. Archer Malmo Intranet Topics. Pages in the *Topics* section cover a variety of subjects and have wiki functionality so all employees can share their knowledge. *22_ArcherMalmo_12_Topics_live.png*

Topics Highlights

1. ***Topics* section.** This section includes various types of information about documents, file templates, client biographies, process outlines, IT information, HR information, company policies, internal processes, how to do certain things, tools, and more. The pages within these topics are wikis and are maintained by the employees, so everyone at the organization — not just delegated content owners — can share their knowledge without needing to access a CMS or to acquire approval. This *Topics* area is fast emerging as the place where employees can find answers to any questions they may have.
2. **Client pages.** Because client pages have wiki functionality, people who work with clients can easily add information on them. Others can then access the information to get a jumpstart when working with a client that is new to them. The information on client pages also helps ensure that clients receive a consistent, approved message from all agency staff.

Topics, Mobile

Image 23. Archer Malmo Intranet Topics — Mobile View.
Topics and their wiki functionality (here, zoomed in) are also available on mobile devices.
23_ArcherMalmo_13_MobileTopics_live_cropped.png

Topics, Mobile Highlights

1. **Drop Columns.** The same topics appear on mobile as on desktop, but the columns are stacked vertically to best accommodate the lists on the small screen.

DESIGN PROCESS AND USABILITY WORK

An Accidental Intranet Project

Employees were spending a lot of time emailing each other to get answers to questions that ideally would be common knowledge to any agency employee. From that challenge emerged the idea to create a unified knowledgebase and make it part of a new intranet. One of the primary benefits of creating a new information-based system was that it would offer tools to assign content ownership to people who are authorities on the information. With that in mind, the team developed a WordPress install to help determine what information to include.

In these early stages, the agency was not yet planning to replace the existing intranet, so the early experiments were more exploratory than aimed at intranet planning. Given this, the initial vision for the knowledgebase was that it would likely be separate from or complimentary to an intranet.

Much of the research that was eventually folded into the intranet initiative was conducted to redesign the agency's public facing website. This research included:

- Content model exercises
- A content audit of the existing site
- A domain subject model exercise to describe the site in more detail
- An exercise to document existing taxonomies and categories
- Group content strategy sessions
- A survey to help determine how employees were using the intranet and solicit their ideas for a future version

Through these efforts, the team decided to take a content-first approach for the .com site, which helped highlight the types of information that would be needed from internal stakeholders to make it happen. This, in turn, created the momentum that spurred the intranet redesign.

Information Architecture

Getting the IA right was a priority from the start. IA wasn't overly difficult for this project, because the site is mostly organized around tasks and functionality, such as ordering lunch, communicating with coworkers, and looking up specific information. The *Topics* section, which is the site's wiki/knowledgebase area, is where the IA is most noticeable because it is a collection of categories. The initial categories were determined by analyzing existing content found on the old intranet, which consisted mainly of HR or IT information.

After sorting through existing content, the team began to identify other types of information that had to be included, such as brand- and culture-related content, process information, a client section, and how-to content. Because it had a good starting point with content and knew the type of information needed for the .com redesign, in some ways the IA almost created itself. Also, given the platform's built-in flexibility, the team can add new categories as needed in the future.

Menu Approach and Navigation

The menu design was driven primarily by common tasks that users need. For example, ordering lunch through the site is the most common task, so it had to be part of the navigation. Given this, it was clear that the menu should be task-oriented overall, which made it much easier to determine the other menu items.

The search function also plays a huge role in site navigation because the goal is for content to grow and encompass more and more information over time. When the intranet reaches this tipping point, navigating the wiki area may become more difficult so having great search functionality and a great search results layout was key from the get-go.

Adoption and Buy-In

The lunch ordering tool proved pivotal on many counts. Since its inclusion was guaranteed, it ensured that some subset of employees would visit the site daily or weekly and would be the first to sign on to the new system. Through this exposure, they would learn about other helpful site content and tools over time.

To aid adoption now that the site has been launched, the team is currently focusing on an educational email campaign and training sessions to help people get more involved with and contribute to the site. The email campaign will consist of multiple emails, each addressing a specific intranet value or function. This will hopefully keep the new intranet top of mind. The other strategy to help drive adoption is to ensure that the site is always updated with fresh content and to help users think about the intranet as a place where content should go. For example, the team is making efforts to ensure that any all-agency emails are posted on the site. That’s also helping people understand that they can use the intranet as a communication tool.

GOVERNANCE

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
User Experience Team	• Content governance, user assistance and guidance, troubleshooting, maintenance, new features and functionality, and IA
Digital Development Team	• Development, server maintenance, and functionality
Human Resources Team	• Content, announcements, and document governance
Creative Team	• Design, brand guidance, and document and content governance

Ownership

The goal for the intranet has always been that it be owned by all employees. Staff members come and go, but the information is always needed. The digital, HR, and creative teams own the intranet most directly; the agency's UX Architect David Sparks is the site's "keeper" until the email campaign and training sessions are complete. These sessions will help aid in buy-in and will disperse ownership to subject matter experts.

Maintenance and bigger changes will remain with the UX and development teams.

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	inside.archermalmo.com
Default Status	No browser homepage or bookmarks are required, but most employees likely have it bookmarked.
Remote Access	The site requires authentication with employee G Suite email; once authenticated, employees can access the intranet from anywhere.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2000–2008	• First company intranet, built with Google sites
Early 2015–late 2016	• Knowledgebase research and testing options. Although the recent redesign started in approximately November 2016, planning for it essentially started in early 2015, when a few team members began looking into knowledgebase options.
2016	• VSO 2.0 Collaboration launch: the first pilot of intranet collaboration functionality
June 5, 2017	• New intranet launched on Archer Malmo's 65th anniversary, celebrated on June 5, 2017.
June 2017–present	• Gradual and continual updates to content, resources, and functionality, including: o Adding an existing form that lets employees request help from any available interns o Revamping intern help system and rebuilding the lunch ordering system from the ground up (upcoming) o Integrating Slack o Adding content tags to search results o Creating a company history page
Overall redesign timeframe: Approximately 8 months total	

Image 24. Archer Malmo Intranet Old Homepage. The homepage of the agency's old intranet, which was powered by Google Sites.
24_ArcherMalmo_14_InsideArcherMalmo_version1.png

CONTENT AND CONTENT CONTRIBUTORS

Governance

The team's approach to content governance was very direct. First, three team members took the lead. Because they started with a decent amount of content, they recruited subject matter experts to review it and provide any needed content or document updates.

Now, the UX architect typically creates any new pages or helps someone else create a page; new pages are then shared and reviewed to ensure they have a consistent tone and are on brand.

Contribution

To date, approximately 10–15 contributors have created pages on their own or with assistance. Contribution is encouraged by flagging all staff emails that should actually be intranet content. When these group emails go out, a team member will ask the senders if they would like the information posted on the intranet; sometimes it's even possible to short-circuit that chain by catching a topic before it's announced via email and encouraging the author to post it on the intranet first.

Ironically, an email campaign is currently underway to encourage intranet contribution and continued use.

Other content-related activities include:

- **Training.** Training has been addressed on a one-on-one basis. This was one of the main reasons for choosing WordPress. The team assumed that if some staff members have knowledge of a CMS, they would likely have used WordPress before or at least know about it. WordPress also has a wealth of learning resources available online because it is so widely used.
- **Flagging stale content.** The longer-term intranet plan is to develop a system that will automatically flag and send reminder emails about potentially stale content. Because the site is still so new, this hasn't been a challenge yet; to keep content fresh, each team owns its own section, such as HR and the like.
- **Maintaining quality.** So far, responsibility for content quality control lies with Justin Dobbs, a member of the creative department. Dobbs is leading the charge to ensure that everything is concise, helpful, on brand, and worded in a way that is easy to understand.
- **Content guidelines.** Content guidelines will be an essential part of future growth as people become increasingly educated and start creating new content. Currently, guidelines are managed on a case-by-case basis.

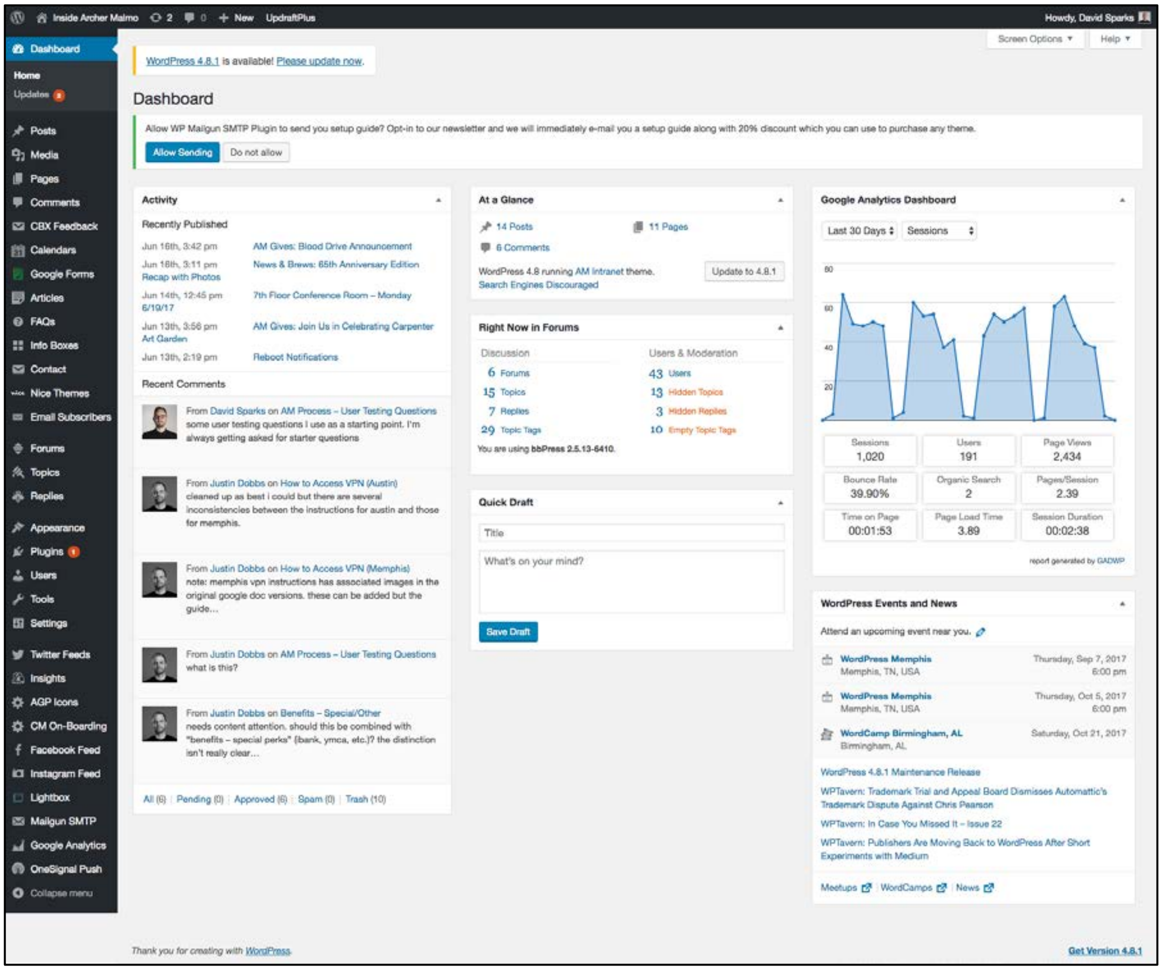


Image 25. Archer Malmo Intranet CMS. The intranet is powered by the latest version of WordPress, chosen in part because it is well known and easy for non-tech savvy employees to use. *25_ArcherMalmo_15_CMS_live.png*

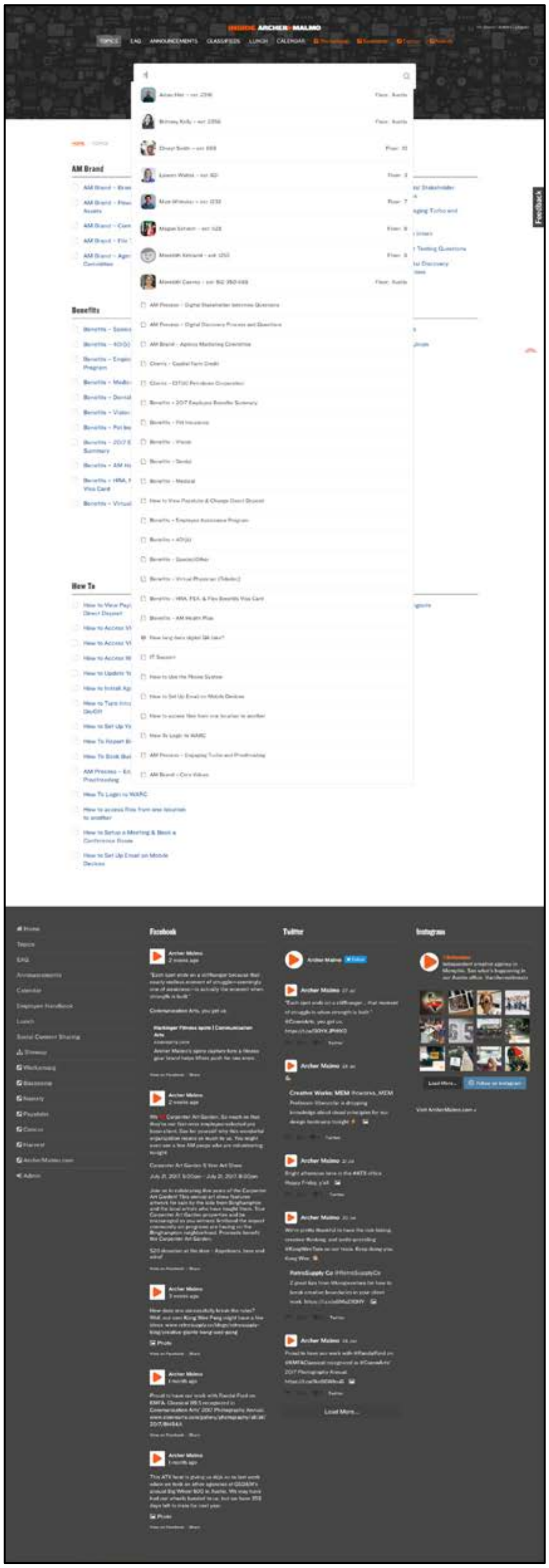


Image 26. Archer Malmo Intranet Search. A powerful search function was necessary to ensure the new intranet's success and adoption. Search is augmented through the use of Namely. *26_ArcherMalmo_16_EngagementFeatureSearch_live.png*

Image 27. Archer Malmo Intranet Search Results. A search results page with Namely integration. These results appear above the other search results on the page. *27_ArcherMalmo_17_SearchResults_live.png*

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Ubuntu. 1GB RAM/5GB disk space
Bug Tracking/Quality Assurance	• The QA team reviewed the site before launch; because the development team was closely involved with the creation, they were able to address bugs along the way and no tech was needed.
Design Tools	• Assets were designed with Photoshop and the site was designed in the browser.
Site Building Tools	• WordPress
Content Management Tools	• WordPress
Search	• WordPress
Other Functions	• Various WordPress plugins

ROI

Positive Reviews

Since launch, the overarching feedback has been that the site is user friendly, so the design has been very well received. Users have noted that the content is more helpful, robust, and informative than on the previous site. The navigation is also much simpler because it is task-based. Users also found improvements in the search functionality, particularly because Namely was integrated into the results.

The team installed Google analytics and a user insights plugin for WordPress that shows popular pages and user activity. Currently, the site averages approximately 60 users a day, which is about one-third of the agency's total employees.

LESSONS LEARNED

UX Architect David Sparks shares some of the things the Archer Malmo team has learned on its journey to a new intranet:

- **Don't let the perfect be the enemy of the good.** "I think for me the biggest lesson learned is the reality that getting a product out the door and making adjustments later can be very valuable. Get the product out the door and tweak as things evolve and as you learn. Going in depth with research and testing can produce amazing results, but sometimes things are actually pretty simple and it would be more productive to just get it done. If something doesn't work, change it. You can formulate ideas about how things will go or what will work best, but seeing it in the real world adds a lot of value and insight."

- **Learn from mistakes**. “One thing that hasn’t gone as planned is the *Classifieds* (forum) section. There were some initial issues with users creating accounts, adding photos to the posts etc. Things like that slowed the adoption of the classifieds. We still need to add the functionality where users will be notified about posts and replies via email. That will help, but we’ve also talked about dropping the forums altogether and using that section to encourage Slack usage, but the problem with that approach is that content in Slack isn’t searchable with the intranet search tool. Part of the value from a forum is if an employee asks for a local roofer recommendation on Slack, no record of that will show up on the intranet. One of the intranet’s goals is to be a place where our employees can go to get answers they need, so the *Classifieds* section was meant to cut down on all-employee emails, such as somebody trying to get rid of a couch or something like that. The *Classifieds* section is going to require a little more work so that it makes sense to keep it — and for now, we’re working out the kinks.”
- **Content is king so think big.** “The first place to start with an intranet redesign in my opinion is the content. What content exists? What needs to exist? How will it get created? Next would be to understand the different user needs. Why are they going, or not going, on the current intranet? What can be done to improve that? What are they doing when they do visit? Are there any features that would be valuable to the end user? So think big. You may not be able to do everything, but knowing what the ideal looks like will help you get as close as possible.”
- Focus on UX, not on being pretty. “Be more focused and concerned with usability and functionality over look and feel. Not to say the design is unimportant, but an intranet should be a utilitarian sort of tool.”

Capital Power

OVERVIEW

COMPANY

Capital Power is a North American power producer that develops, acquires, operates, and optimizes power generation from a variety of energy sources.

Headquarters: Edmonton, Alberta, Canada

Company locations: Capital Power owns and operates power-generation facilities in Canada and the United States.

Locations where users use the intranet: Employees at all 24 locations across North America use the intranet.

Net income: $102 million (CDN) in 2016.

THE INTRANET

Users: Approximately 920 users — 720 employees and 200 contractors — have access to the intranet. In addition to being Capital Power's primary communication channel, most employees access the applications they need to do their jobs through the intranet and use the homepage's *Quick Links* menu to complete time sheets, find coworkers (people search), submit benefits claims, and so on.

Mobile approach: Responsive web design

Technology Platform: Office 365 and Bonzai Intranet

TEAM

Content Updates, Design, and Development: A three-member team is responsible for all content updates, design, front-end development, IA, and governance.

Technical Support: The team receives technical support internally for Office 365 from the company's three-member SharePoint support team and support for Bonzai from the vendor, Dynamic Owl.

Leadership: The VP of External Affairs, the VP IS, and CIO provided feedback to the project, while the Director of Corporate Communications and the IS Senior Manager provided day-to-day input and direction.

The SharePoint Steering Committee, with representatives from across the company, was responsible for leadership, guidance, and direction for the enterprise-wide SharePoint environment, including the intranet.

INTRANET TEAM

Team members shown here (left to right): Tricia Johnston and Jennifer DeCunha.

HIGHLIGHTS ABOUT THIS WINNER

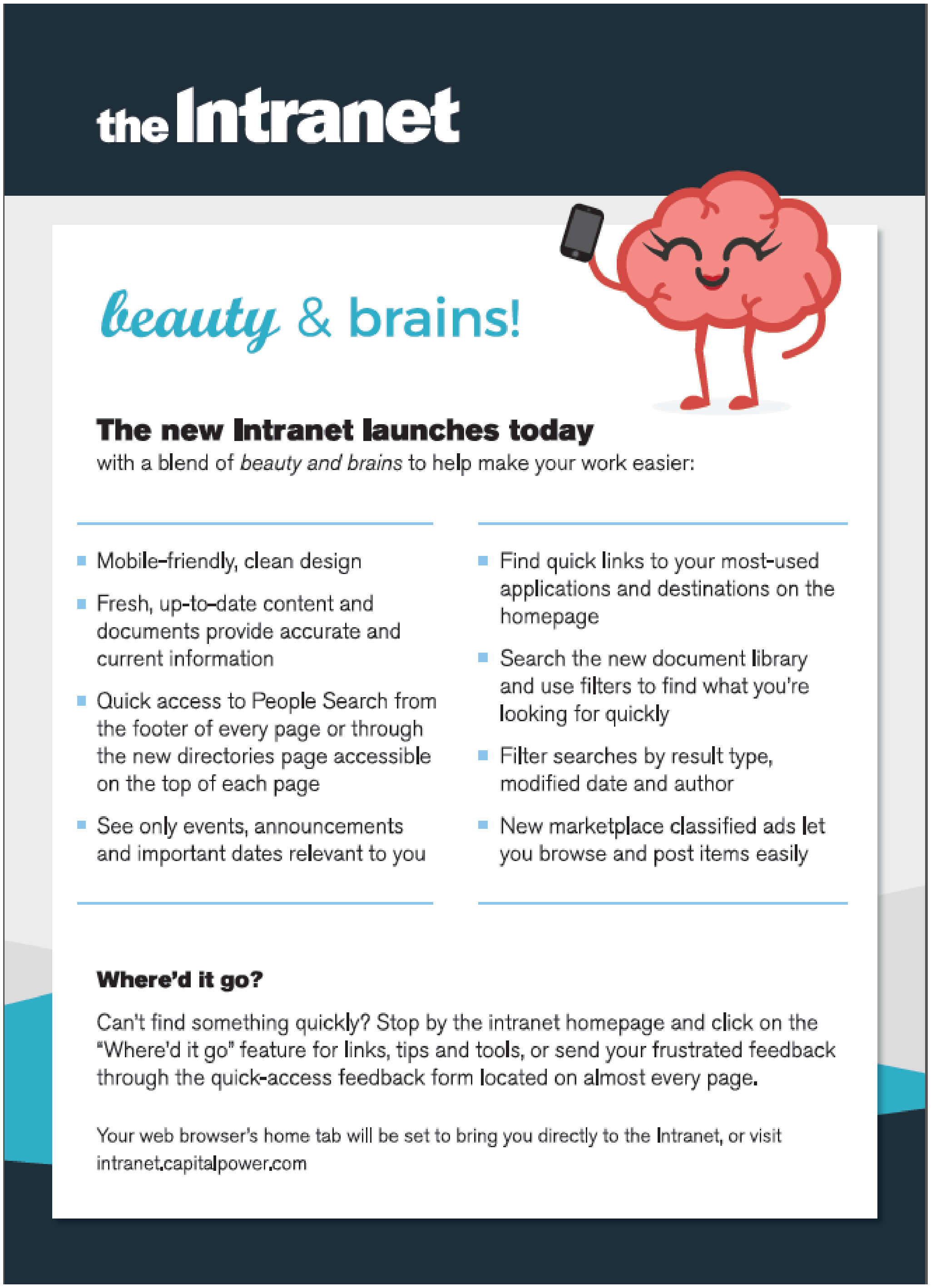
Capital Power started its intranet redesign project with several goals. One was to create a responsive site that would support its workforce, many of whom do not sit at a computer on a regular basis. Another was to make sure that the intranet could be *sustainable* — that is, it would survive technology upgrades intact and would be updated, rather than outdated, as time went by.

With these requirements in mind, the team selected the Bonzai intranet-in-a-box solution. The Bonzai platform offered a fully responsive design, with ongoing software upgrades. The team used Bonzai to create a site that supports 719 employees and 200 contractors in power-generation facilities in 24 locations in Canada and the US.

- **Responsive.** Having a responsive design was a key requirement for the team, as only half of employees sit in front of a computer regularly. The team thus built a site that works across all devices. However, two weeks before launch, it discovered that second-factor authentication would be required to use the site on a mobile device. This added complexity has kept mobile use lower than the team had anticipated, but it hopes to find another, simpler security solution.

- **Intranet-in-a-box.** The team decided to use Bonzai for SharePoint and Office 365 for the redesign. This choice was impacted by the fact that the previous SharePoint intranet had a high level of customization. When the team upgraded SharePoint, the customization was problematic and some pages and tools were broken in the transition. Given this, the team was not interested in any solution that would require extensive customization or require team members to learn technical SharePoint to maintain the site on the SharePoint platform going forward. Bonzai offered a friendly UI for content editing, standard page layouts and templates, and additional features — such as megamenu navigation — that would otherwise require customizations to SharePoint.
- **Rewritten content.** The team knew that simply reorganizing the previous intranet's information wasn't enough — it needed to start from scratch with site content. The site contained about 700 pages of content, and approximately 350 of them were news and announcements that the team planned to migrate post-launch. The team reviewed, updated, or deleted the remaining 350 non-news pages. As part of the review process, the team assigned page-level ownership for each piece of content to help the site to remain usable over time and to accompany the governance plan.
- **Employee awards.** The site's *Milestone Achievement Awards* section is aimed at increasing engagement with the site by focusing on employees and letting people within the organization learn more about each other. Although the award initiative already existed, it was not a part of the previous intranet. The site now highlights the details of a new employee each week and is the third most-visited site area. It also has a low bounce rate, indicating that users tend to spend time in the section and look around.
- **Search improvements.** The site search's quality has improved with the implementation of a new tool and the rewriting and organizing of content, but the designers work on continual improvement. They review abandoned queries and zero search results, as well as the top 30 most popular searches. These popular searches are typically consistent month to month aside from annual events, such as holiday parties or quarterly financials. The team makes whatever changes need to be made to content, titles, or metadata to continually improve the results.

- **Communications plan.** The designers communicated with managers monthly about the new design and previewed the site before launch with the CEO and executive team. Weekly communications started four weeks leading up to launch. Posters with key information were hung the day before launch, with the theme *Beauty with Brains*. On launch day, all locations received postcards highlighting the new site's improvements. Homepage articles offered assistance, and there was a temporary *Where'd it go?* page with quick access to content that was popular on the site's previous version. A month after launch, when users had had time to use the site, team members attended various meetings to give quick presentations, answer questions, and gather feedback.



Communications posters with the theme Beauty & Brains featured key intranet information and were hung the day before launch.

BACKGROUND

It was time for an intranet upgrade at Capital Power; several key factors led to the redesign project:

- **It was difficult to make changes or improvements to the existing site.** The previous intranet had been built using custom display templates and JavaScript to make SharePoint look and function more like a typical intranet. With no in-house technical resources, it was almost impossible for Capital Power's Communications team to improve the existing site, forcing it to constantly work within the site's constraints.
- **Costly to build, costly to manage.** Building customized SharePoint display templates and additional site functionality can be very expensive. Post-launch, you need technical resources in-house to make improvements — as well as a contingency fund for unexpected expenses, which can be costly. Capital Power wanted to move away from this model.
- **Not responsive and difficult to access externally.** Close to 50% of Capital Power employees don't work in an office and have limited access to a computer. Also, the previous intranet site could be accessed only through the network. The process to connect was cumbersome and complicated. As a result, few employees outside the company's offices visited the intranet.
- **Plan to decommission physical servers.** The Information Services team was beginning to move more of the company's infrastructure to the cloud. Building the new intranet site in Office 365 was considered a good pilot project for the much larger SharePoint Team site migration that was planned for later the same year.

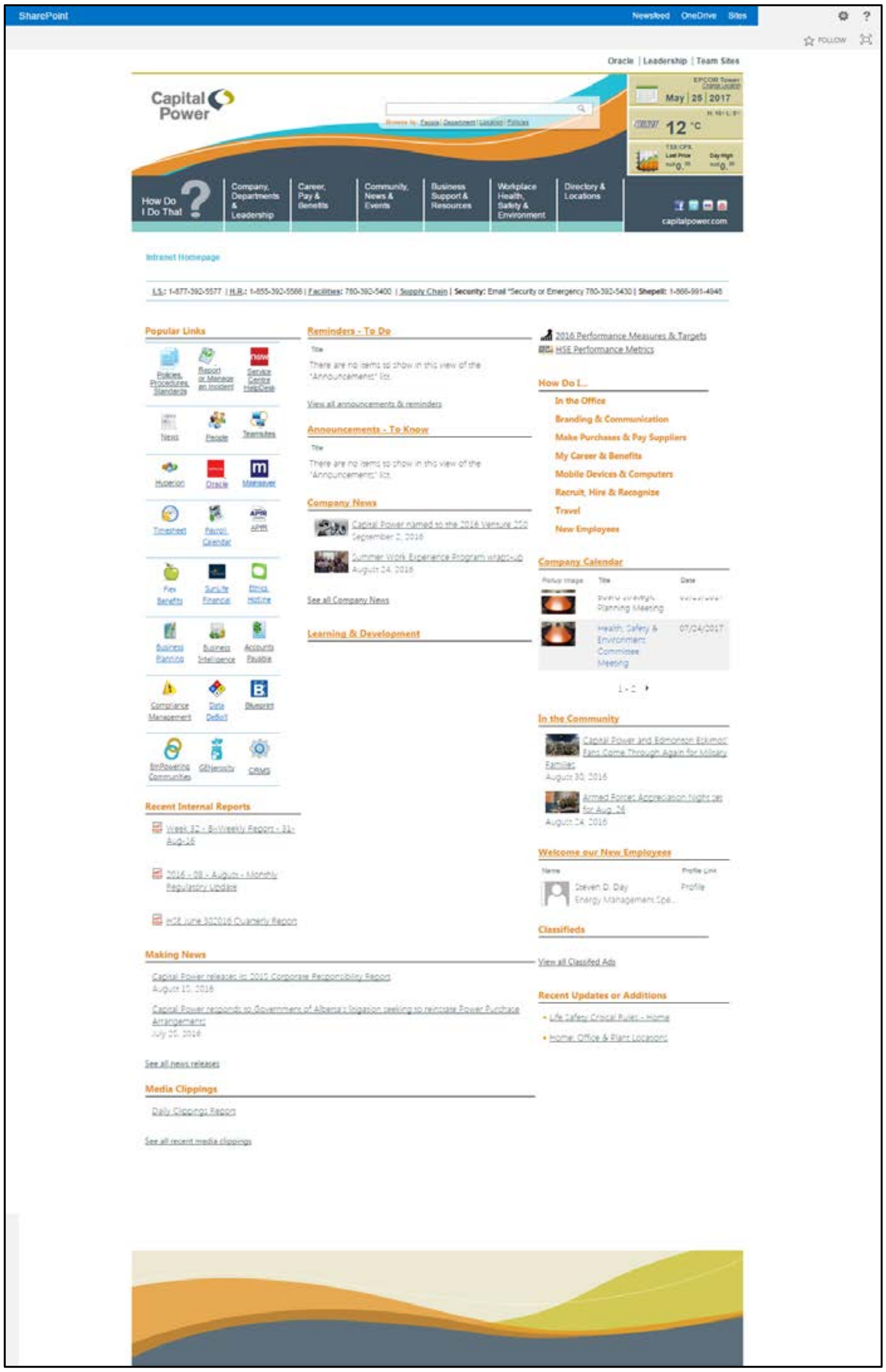


Image 28. Capital Power Intranet Old Homepage. The old homepage was cluttered and offered little visual hierarchy, making it was hard to know which information was a priority and required attention. Employees wanted an intranet that was cleaner and made it easier to find what they were looking for. *28_CP_01_home_oldsite.png*

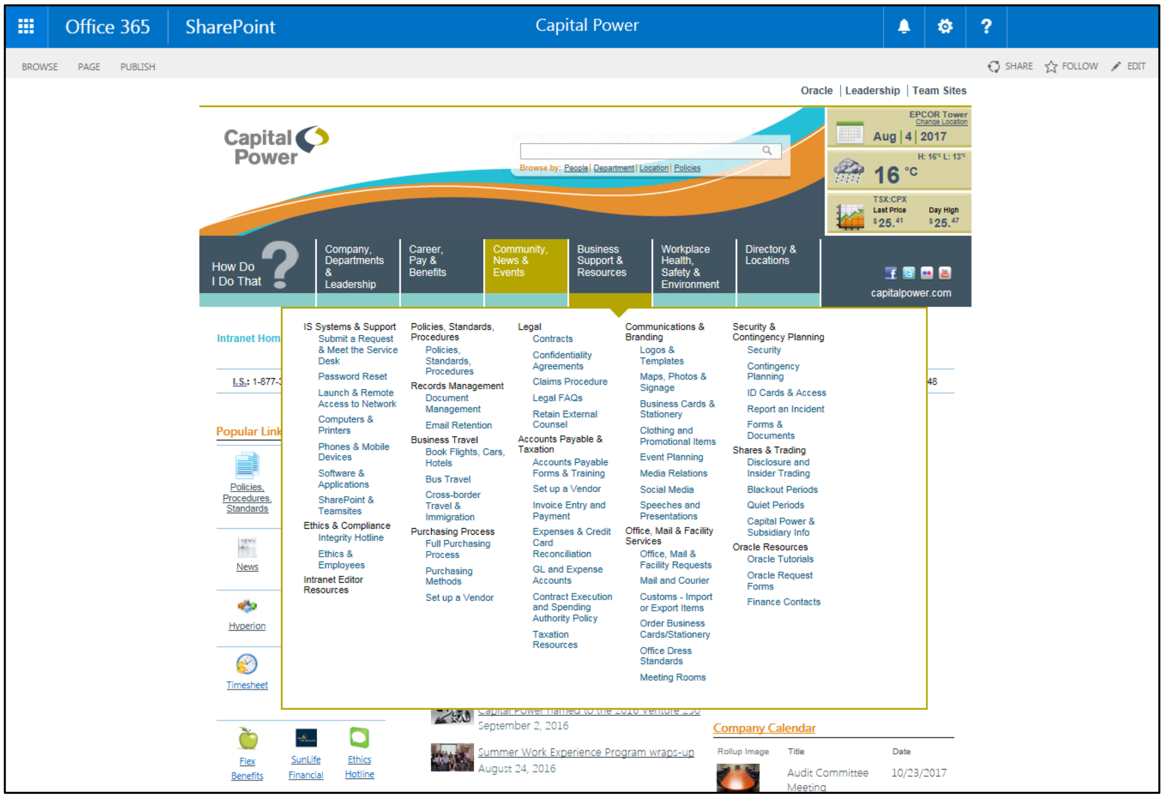


Image 29. Capital Power Old Intranet Megamenu. All pages for every subsite showed up dynamically in the old intranet's megamenus. This made the menus very difficult to use — a problem exacerbated by the fact that menu items were organized by a mix of department groupings and tasks. *29_CP_02_DropDown_Menu_old.png*

Happily Under Budget

When this project began, the team was completely unaware that an out-of-the-box option was available for a SharePoint intranet. The project budget was based on having to hire an agency to design the responsive page templates, build any organization-specific custom features and functionality, and purchase custom web parts for the megamenu, classified ads application, quick poll, dynamic left-navigation, news carousel, and so on.

Choosing Bonzai Intranet for SharePoint and Office 365 as the platform saved them a significant amount of money in three ways:

1. All display templates are responsive, which eliminated planned agency costs.
2. Out-of-the-box features met 95% of the business and functional requirements, eliminating the need for third-party custom web parts.
3. Bonzai display templates have given the team the ability to change the site's look and feel and add additional functionality using in-house resources. Bonzai publishes out all static web content as .asp pages,

similar to a typical CMS. So, using CSS, JQuery, and JavaScript, the team has been able to build additional features as required.

Challenges

The team faced two major challenges with the redesign project, including:

- **Redesigning the IA to fit the Bonzai UI model.** Prior to selecting Bonzai, the team had completely rewritten the intranet site structure using historical traffic patterns from Google Analytics and user testing with Treejack and OptimalSort to better understand how employees thought about information. Once Bonzai was chosen, the designers realized that the planned IA redesign wasn't going to work for the new site. They had decided on left-hand navigation in support of megamenu navigation, for example, while Bonzai relies solely on a megamenu approach, with two sublevels to support users in finding information within three clicks. The designers had to adjust the IA to ensure that all pages were accessible within two clicks from the homepage, with navigation to parent pages through breadcrumbs or the megamenu, and to related sibling pages through related links on the page. It was a challenge but, overall, they ended up with a simple, concise, and more deliberate site structure.
- **Mobile access.** With almost 50% of Capital Power employees lacking regular intranet access, building a responsive site was a major requirement of the redesign project. The team's understanding during the build phase was that employees would be able to access the intranet from their mobile devices using only their company email and password. Two weeks before launch, the designers were informed by the company's security team that two-factor authentication would be required to access the site. As a result, mobile traffic does not even come close to meeting their initial expectations. This is an ongoing challenge; they continue to look for an alternative that will make it easier for employees to access the site externally while ensuring that the site remains secure.

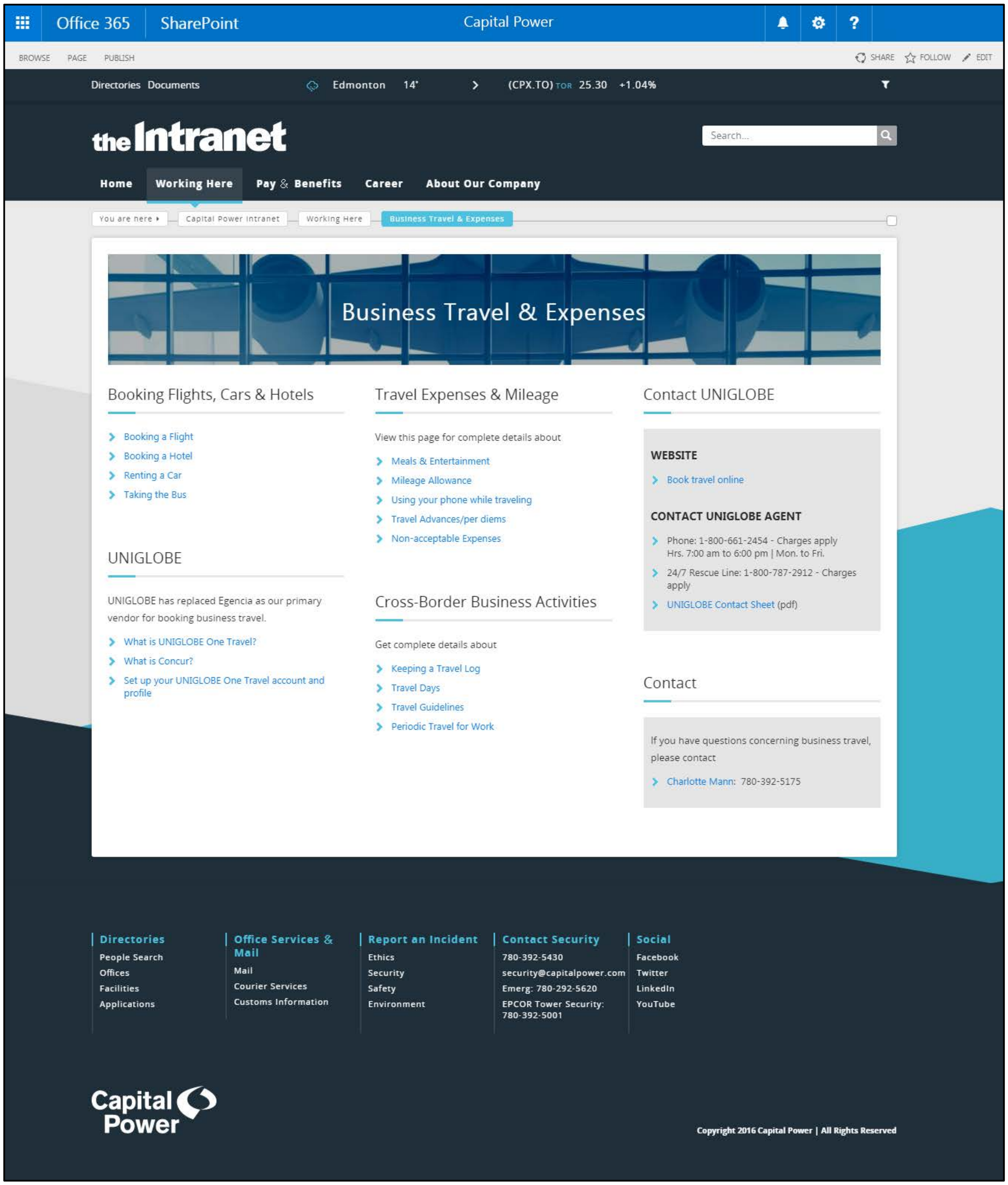
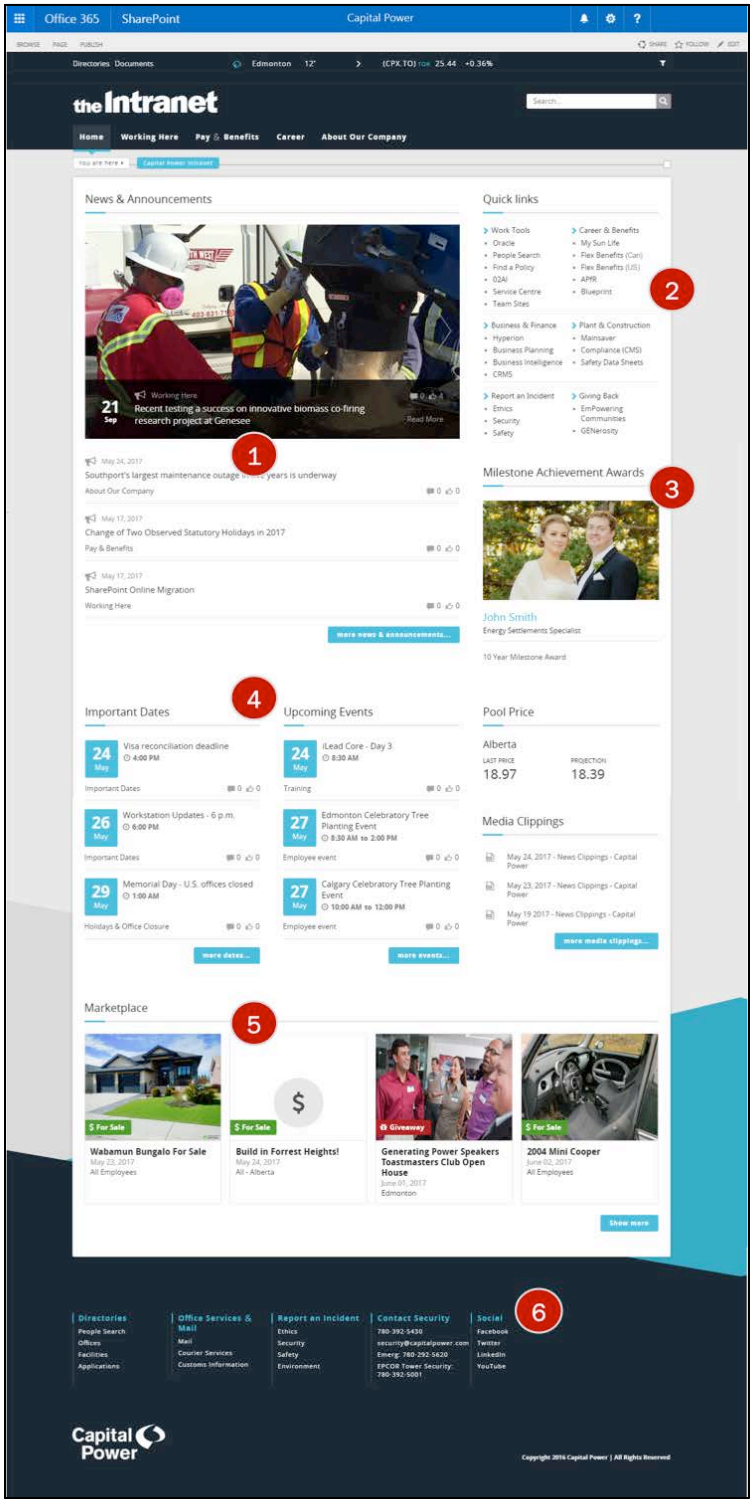


Image 30. Capital Power Intranet Navigation. This shows how navigation works in Bonzai. In most cases subsite content is typically accessible from these landing pages. With no left-navigation, users can use the breadcrumb links to return to the landing page and choose another page in the same section, or they can access sibling pages through related content links on the page or through inline text links. *30_CP_03_SubSite _Navigation_live.png*

Approach

One unique thing about the team's redesign approach was that it decided early on that none of the information from the old site would be automatically migrated to the new intranet. Capital Power was in a good position when this project began, as the existing site had only 700 pages total, and about half of them were news and announcements. With only 350 pages to review, update, and/or delete, the team felt it had the perfect opportunity to reassign page-level ownership and rewrite everything from scratch.

The typical redesign pitfall that team members were trying to avoid was building a site that looked good on the surface, but had very little improvement to the actual content, structure, and functionality below the top few levels. They felt it was critical to the project's success that the redesign include every aspect of the site: design, structure, search, content, document management, and page-level ownership. In other words, the initiative touched every aspect of the intranet.



Homepage

Image 31. Capital Power Intranet Homepage. The homepage of Capital Power's site gives users quick access to updated information, essential tools, and popular content areas. *31_CP_04_home_live.png*

Homepage Highlights

1. ***News & Announcements*.** The homepage features a news carousel that includes stories important to the entire organization. A subtle arrow on the side of the image indicates the carousel. The content's posting date is prominent, helping users identify which information has changed since their last visit. Each article includes a headline, a link to read more, and the number of comments and likes on the article. The carousel is followed by announcements, which also feature a date, headline, and number of comments and likes. Announcements are targeted based on location and role. Both news and announcements are also sent to employees via email every Wednesday.

2. ***Quick links*.** The *Quick links* area leads to external tools that are essential to employees' daily work. The links provide immediate access to those applications. The team sees the site primarily as a communications tool that acts as a front door to business services and applications.

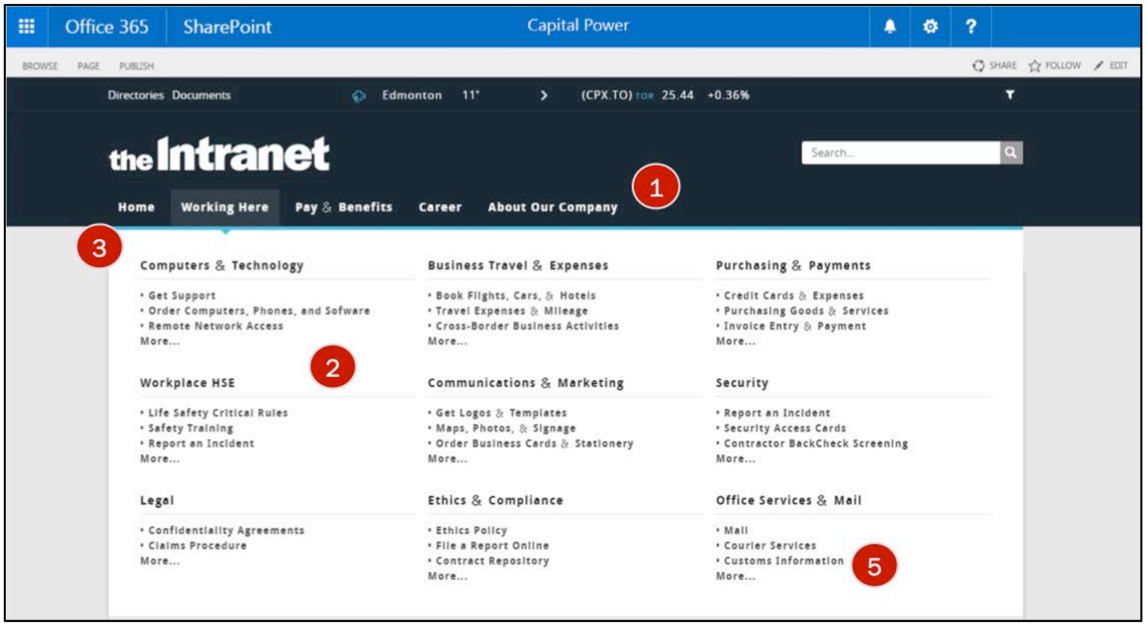
3. ***Milestone Achievement Awards*.** One of the site's most-visited sections highlights employees receiving Milestone Awards, which celebrate time with the company in five-year increments. An employee-submitted picture is shown, along with the recipient's name, title, and number of years of service. A link for each recipient takes readers to the recipient's submitted profile. This section was purposefully added to the homepage with the intent of increasing engagement with the site, and the content has proven popular.

4. **Timely information.** The lower half of the page includes *Important Dates*, *Upcoming Events*, *Pool Price*, and *Media Clippings*. Each date and event is listed with a clear date and start time. Events are targeted to employees based on role and location. *Media Clippings* are posted daily. Dates, events, and clippings all include links to additional items. When users follow a link to an event page, they can register directly from the page and see how many spots remain. Event organizers can email attendees and the event can be saved into Office calendar.

5. ***Marketplace*.** The site's second most popular area is *Marketplace*, where employees can post items for sale or to give away, or publicize external events. The most recent postings are shown with an image, category (such as *For Sale* or *Giveaway*), date posted, and office location, if relevant.

6. **Footer.** The bottom of the page lists links to key areas for information and support. These include links for directories, office services and mail, incident reporting, security, and links to the company's social media presence.

Navigation



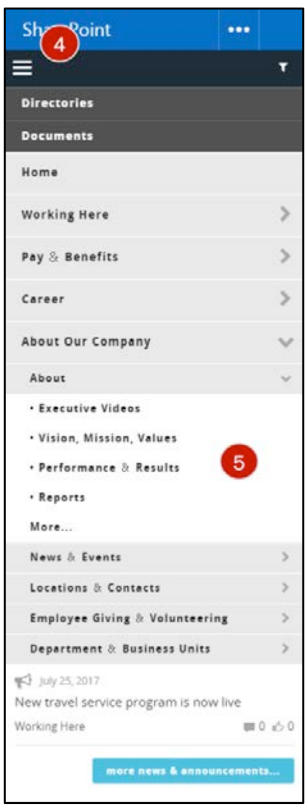


Image 32. Capital Power Intranet Navigation. Navigation is displayed in a megamenu on desktop and behind a hamburger menu on mobile. *32a_CP_05a_PrimaryNavigation_Mobile.png (above) and 32b_CP_05b_WorkingHere_Navigation_Live.png* (left)

Navigation Highlights

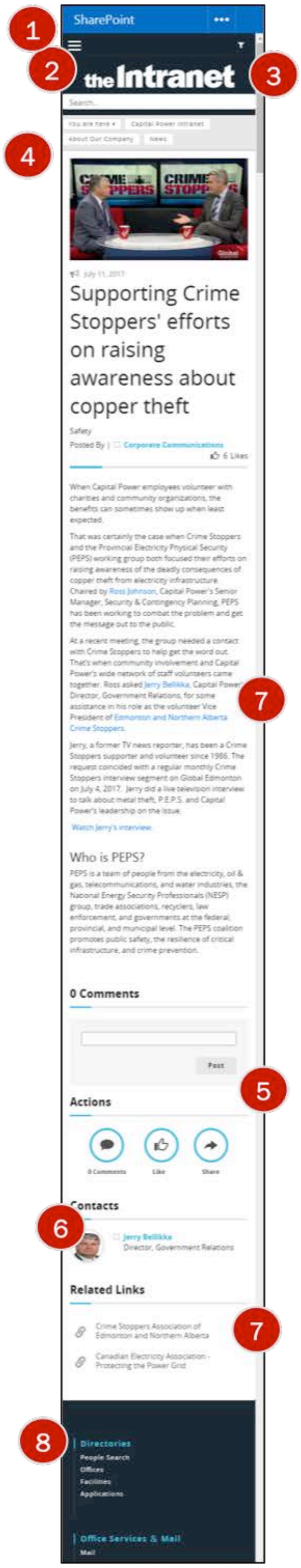
1. **Structure.** Team members began creating an IA and navigational structure for the site before they decided to move forward with the Bonzai platform. Then, due to the platform's structure, they had to rethink the navigation to fit its capabilities. They were originally planning to have a left-hand navigation in addition to a megamenu, but the tool uses only a megamenu approach with at most three levels of content, including the homepage.

2. **Megamenu.** The site uses a megamenu to expose additional navigation levels to the user, allowing quick access to content of interest. The megamenu doesn't show every link within a section; it includes top tasks only to help prioritize and reduce the number of links. Thus, key areas are listed, together with a *More…* link. Full links to the pages within a subsite are listed on the main landing page for each subsite.

3. **Task-based approach.** As with many intranets, the redesign changed the site from organizing content based on department and task to using solely a task-based approach. The main navigational categories now are *Working Here*, *Pay & Benefits*, *Career*, and *About Our Company*. The team started out with seven navigational categories in the old intranet and merged them into four as a result of card sorting and tree testing with employees.

4. **Hamburger menu.** The responsive site uses a hamburger menu to hide and expose the mobile navigation. The main categories are shown, and users can tap them to expose the subcategories beneath. Users can also tap one level deeper to see third-level links, which, like the megamenu, expose the most popular content and place the rest behind a *More…* link.

5. **Subcategories.** The site's structure is clear in both the desktop and mobile versions. In the megamenu, secondary categories are indicated with bold type and followed by an underline, with third-level links in regular type in a bulleted list below. In the mobile design, second-level categories are indicated with indentation and a slightly smaller type size. Third-level categories are listed on a white background with bullets. This helps reinforce the site's hierarchy and helps users understand where they are in the site and in the site navigation.



Mobile Design

Image 33. Capital Power Intranet News Page — Mobile View. This shows how a news article page looks on a mobile phone.
33_CP_06_NewsPage_Mobile_live_Crop.png

Mobile Design Highlights

1. **Fully responsive site.** The intranet was created using responsive design to enable the approximately 50% of users who do not sit at a desk to access the site. However, the team found out two weeks before launch that mobile users would have to use second-factor authentication; this has kept mobile usage lower than was originally hoped for.

2. **Navigation.** The navigation is available via a hamburger menu in the site's upper left corner.

3. **Search.** The mobile site keeps search front and center for employees, with a visible search box at the top of the page. Users can thus see and use search easily, even on a mobile device.

4. **Breadcrumbs.** Breadcrumbs appear at the top of the page. The breadcrumbs are indicated with a *You are here* label, followed by the category, subcategory, and tertiary category in which the content appears. The labels are surrounded by a white background to make them slightly larger and a bit easier to tap on a small mobile screen. Including breadcrumbs on mobile is always a trade-off of space versus functionality. The benefit of breadcrumbs is that they help users understand their location in the site and provide quick access to higher levels in the site structure. The downside is that they push content down the page and can be difficult to tap.

5. **Comments and actions.** The number of comments is displayed at the top of the news story, and users can add a comment at the bottom of the story, even on mobile. They can also like or share the content. So far, liking has been the most common action on the site, but commenting is growing over time. The Communications team tries to present content in a way that encourages comments.

6. **Contacts.** Relevant contacts are listed at the bottom, with the contact's picture, title, and name. Each page has a content owner to help with review and revision.

7. **Links.** Related links appear at the bottom of the page; links also appear within the story's text, making it easy for users to navigate to additional or related information.

8. **Footer.** Footer links are stacked in the mobile design to make them easy to tap.

Milestone Award

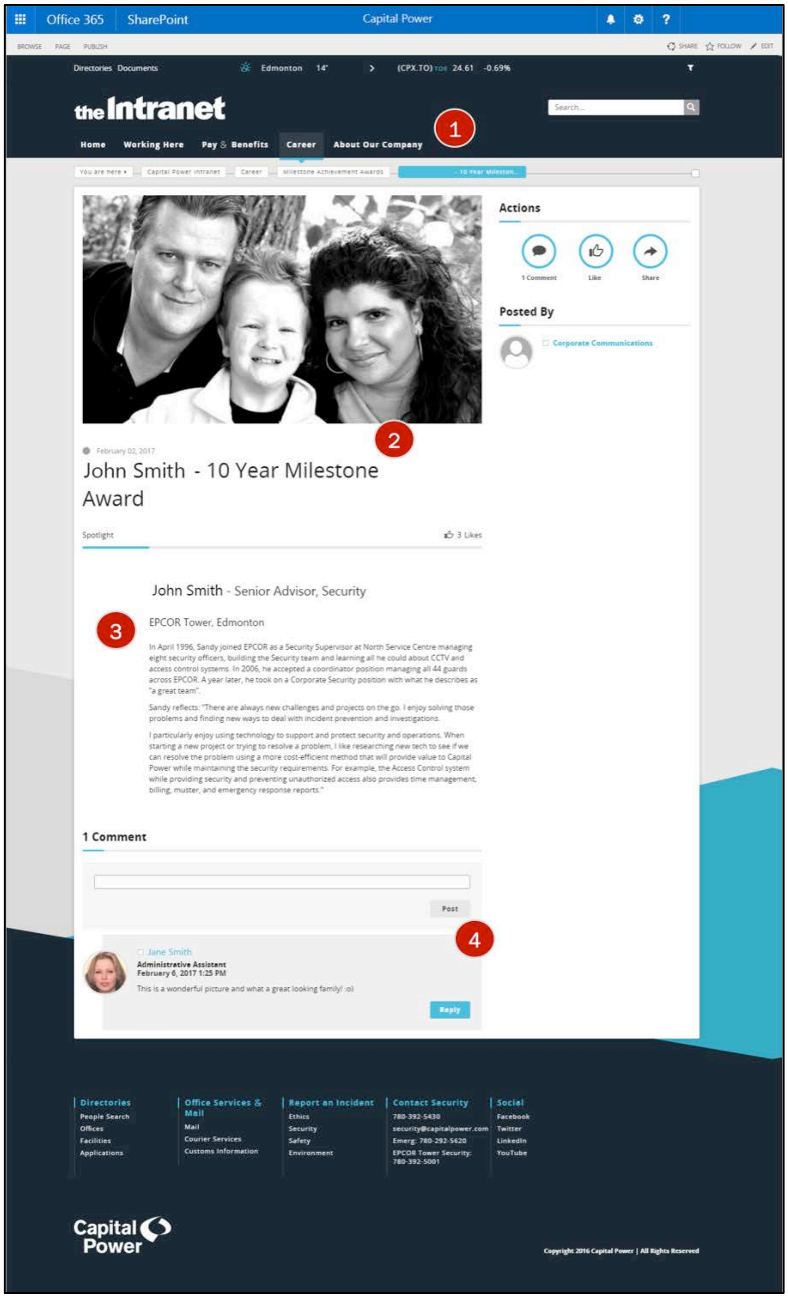


Image 34. Capital Power Intranet Milestone Awards. Milestone Awards celebrate employee's time at the company and are awarded for every five years of employment. Milestone Award content has proven to be popular on the site. *34_CP_07_MilestonePage_live.png*

Milestone Award Highlights

1. **Navigation signposts.** Content pages include breadcrumbs across the top of the page so users know where they are in the site navigation. The currently selected category — in this instance, the *Career* category — is highlighted with a slightly lighter background color and a blue underline. Breadcrumbs also help users navigate to higher levels in the site structure, such as back to the *Milestone Achievement Awards* landing page.
2. **Photos.** Milestone Award recipients provide their own photographs, which are featured at the top of the page, followed by the recipient's name and number of years of service. The pictures help put a face to a name; also, rather than using a standard employee photo, letting recipients choose the photo adds even more personality to the page.
3. **Employee information.** Awards are given monthly. One month before the award, recipients receive a set of 15 questions, and they can pick and choose which they would like to answer. The Communications team summarizes the responses and posts a profile for each employee.
4. **Comments.** Employees can comment on the post, offering congratulations to colleagues. Comments include the name, picture, and role of the person commenting, along with the comment date.

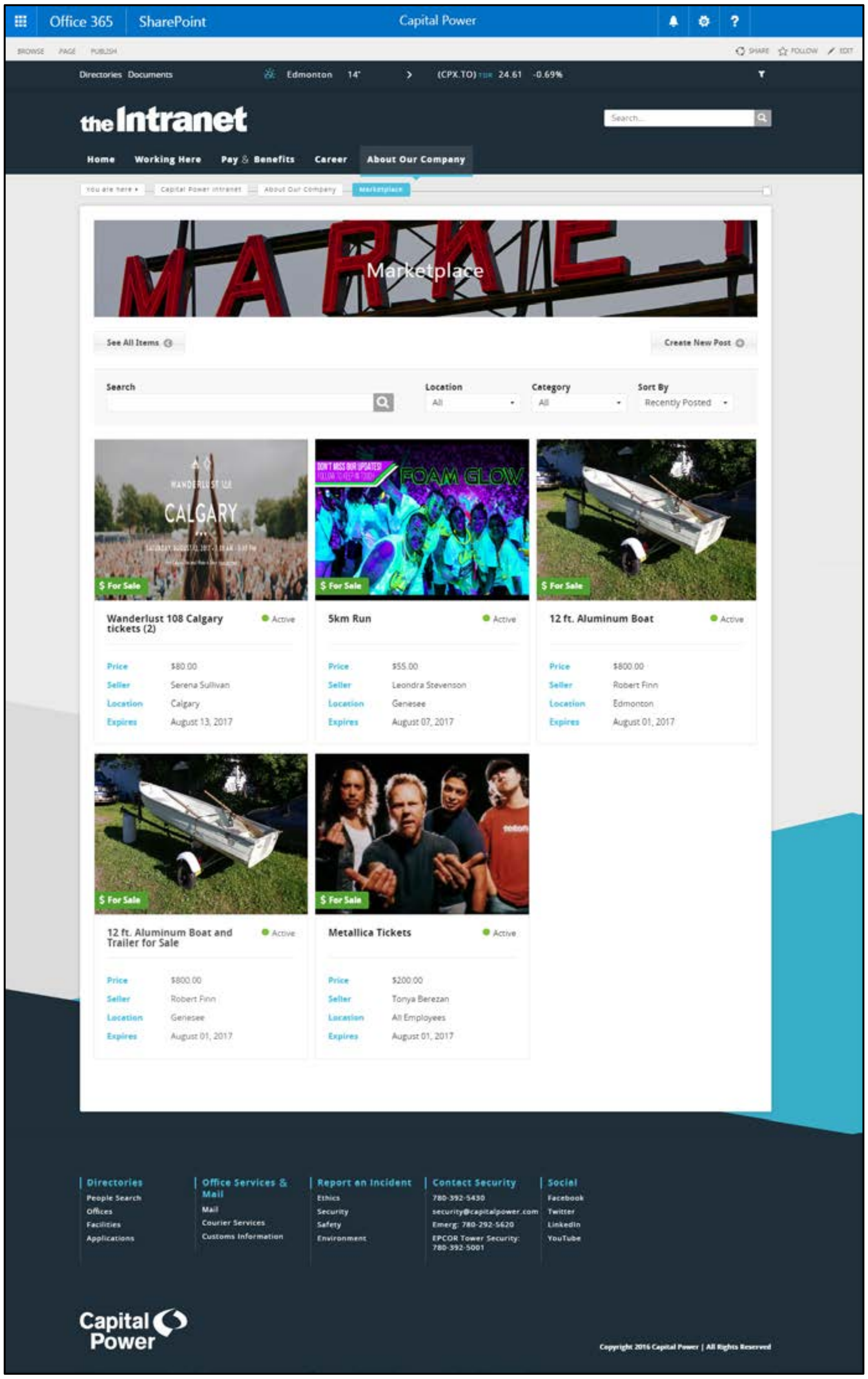
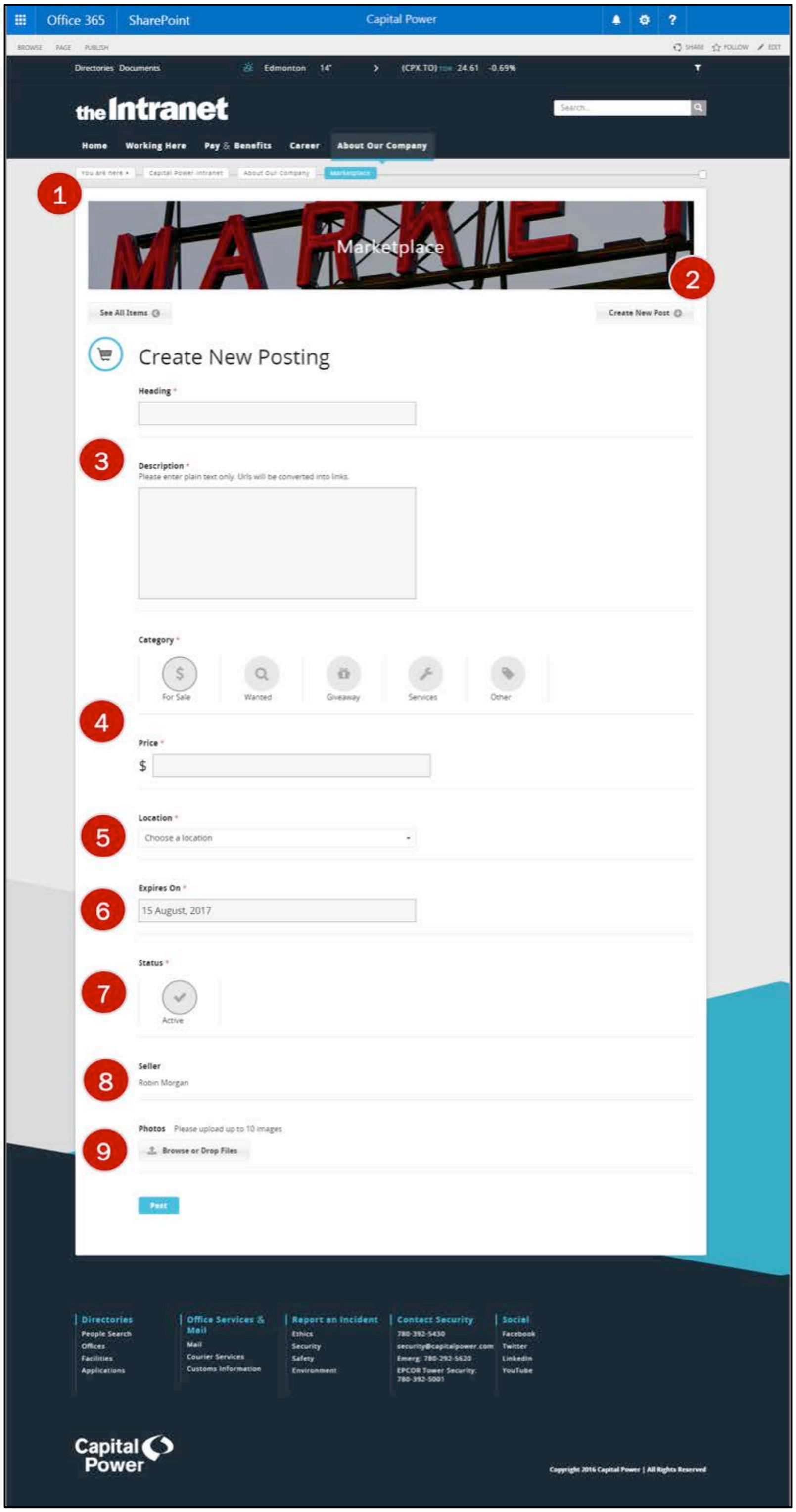


Image 35. Capital Power Marketplace Landing Page. The *Marketplace* page is dynamically generated — rolling up items from a SharePoint list behind the scenes. *35_CP_08_Marketplace_Landing_live.png*



Marketplace Posting

Image 36. Capital Power Intranet Marketplace. The *Marketplace* is the third most-visited site area. Items are highlighted on the homepage and on a dedicated *Marketplace* page, and employees can post items easily through this posting process. *36_CP_09_Marketplace_PostAd_live.png*

Marketplace Posting Highlights

1. **Marketplace offering.** The *Marketplace* lets employees post giveaways, items for sale, items wanted, services, or special events external to Capital Power. The offering is a Bonzai out-of-the-box product.
2. **Create a new post.** The *Create New Posting* appears on the Marketplace listing page, letting employees easily access the page, which encourages participation.
3. **Heading and description.** The form lets users enter any title and description for the item they're posting. Only plain text is allowed to maintain consistency across postings, but any URL added is automatically converted into a link.
4. **Category and price.** The site offers five categories — *For Sale*, *Wanted*, *Giveaway*, *Services*, and *Other* — to accommodate varied types of posts. The categories also help educate employees about which types of posts are appropriate, while allowing flexibility through the *Other* category.
5. **Location.** Users can select which locations should see the content being posted. For instance, if it is a physical product being sold, users may want to post it only to colleagues in the same or nearby locations.
6. **Expiration date.** The expiration date is auto-populated, but users can change it. The default (and maximum) selection is two weeks.
7. **Status.** Posters can switch the status from *Active* to *Inactive* if an item is sold or they want to remove it for any reason. The checkmark is grayed out unless the user clicks to activate the listing.
8. **Seller.** The seller's name is auto-populated based on the user's log in and cannot be changed.
9. **Photos.** Users can upload up to 10 photos to accompany their posting; they can either browse for photos or drag and drop them onto the page.

STIP Estimator

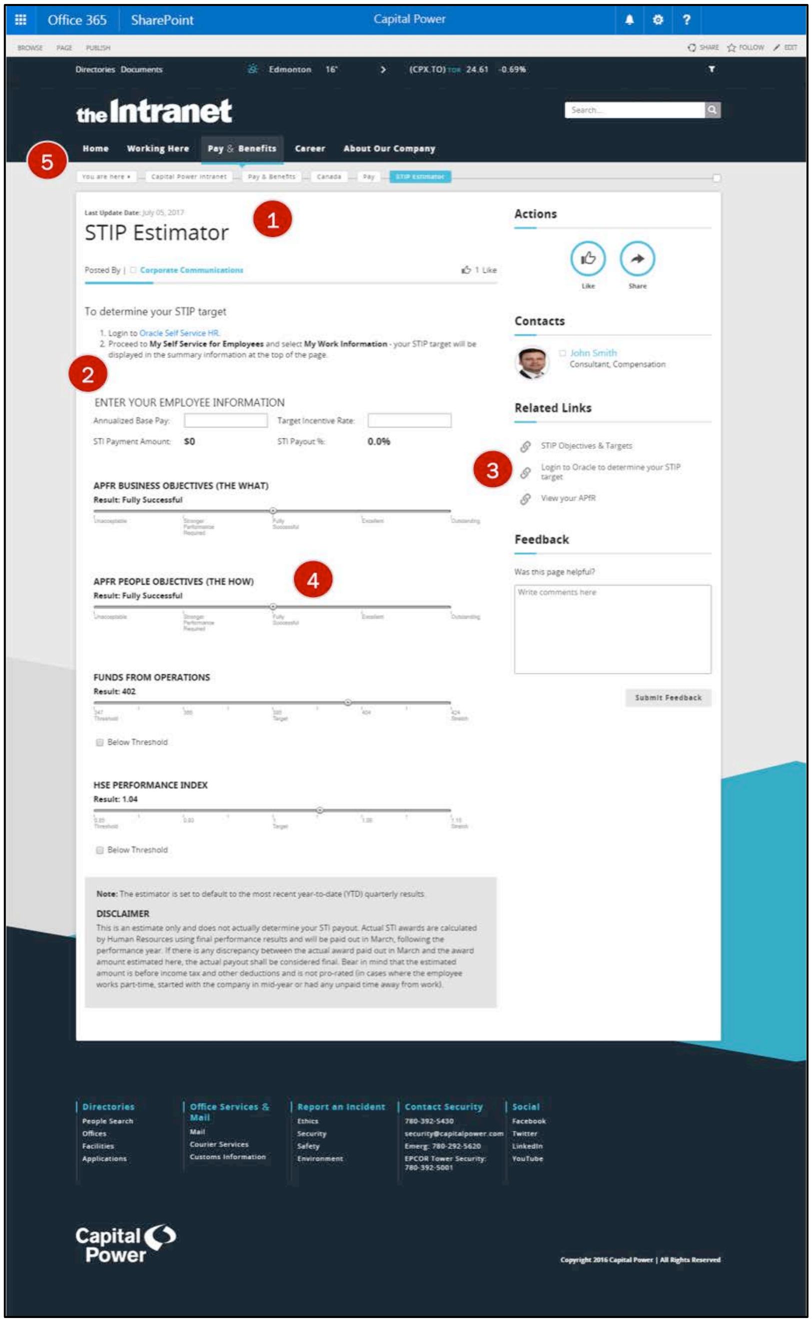


Image 37. Capital Power Intranet STIP Estimator Tool. The Short Term Incentive Program (STIP) Estimator lets employees enter their base pay and target incentive rate to see how much they might receive at bonus time. *37_CP_10_Estimator_live.png*

STIP Estimator Highlights

1. **Payout information.** The Short Term Incentive Program (STIP) Estimator application shows employees what their payout might be at bonus time. This JavaScript-based tool was built internally to support a need specific to Capital Power’s employees. Employees visit this tool frequently from January through March when they are anticipating their bonuses.
2. **Base pay and incentive rate.** Employees enter their base pay and target incentive rate, which is set by HR. Instructions on the page tell users where to find this information within Oracle Self Service HR.
3. **Related links.** Links on the page lead to information about STIP as well as to tools where employees can find the data they need to enter on this page.
4. **Variables.** Users can manipulate the sliders to see how corporate results and measures — such as Threshold, Target, and Stretch — might impact the payout.
5. **Security trimming.** Breadcrumbs on the page point out that the view of this tool is for Canadian employees. Because pay and benefits information is location-specific, Canadian employees see a different view than US employees. Employees see only the content that applies to them.

Global Site Search

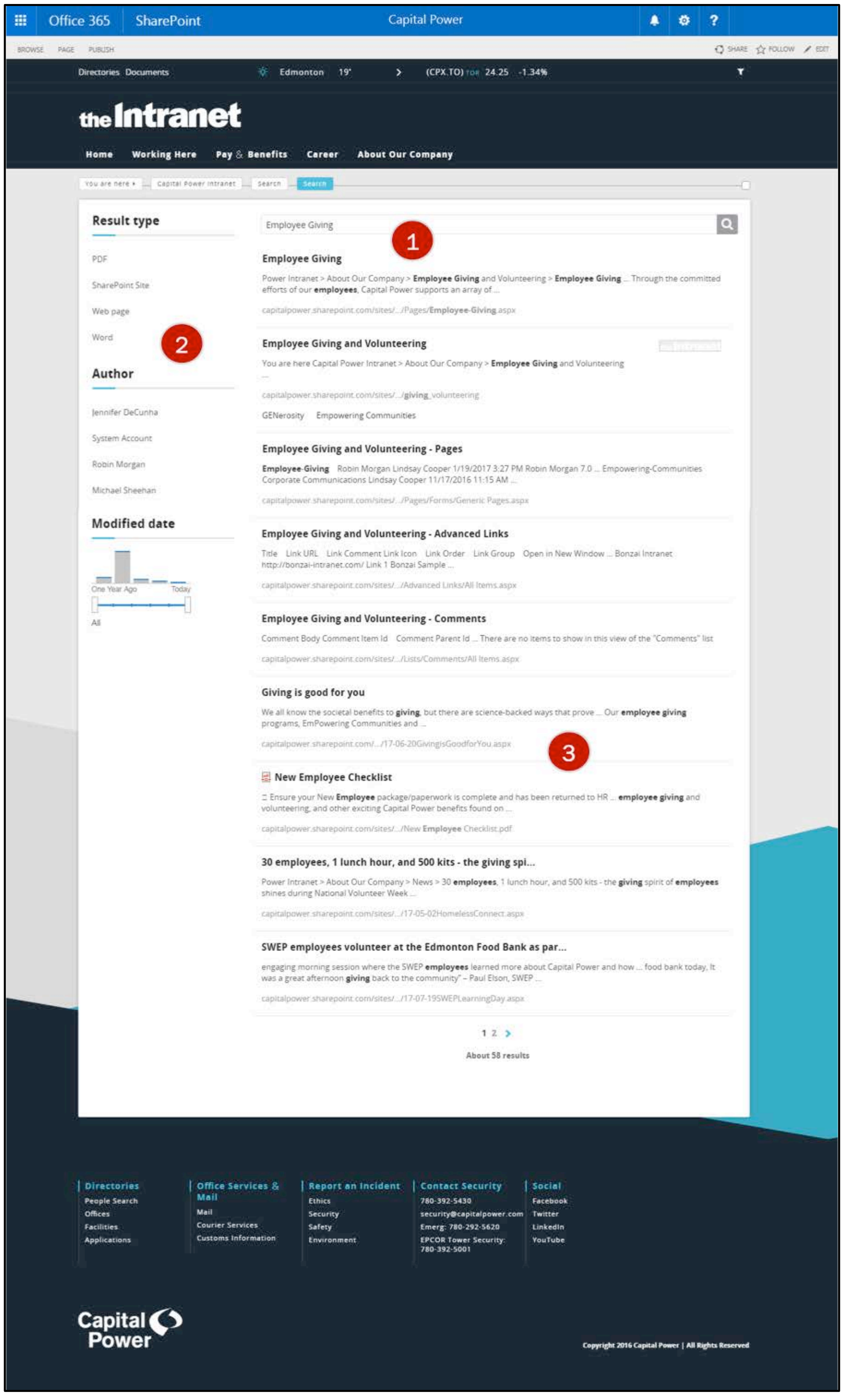


Image 38. Capital Power Intranet Global Search. The global search indexes intranet content, documents, and the past 12 months of news items. *38_CP_11_globalSiteSearch_live.png*

Global Site Search Highlights

1. **Search.** The global site search indexes all of the intranet's content pages, along with all documents that live on the intranet and the last 12 months of news stories. A news-specific search within *News & Announcements* provides access to news stories that are more than a year old.
2. **Security-trimmed results.** Users are shown only the results they are allowed to see. Results are security trimmed by default, and can also be sorted via refiners and some custom metadata.
3. **Results.** Results show the page title and location, and the text that contains the user's search query.

DESIGN PROCESS AND USABILITY WORK

The Capital Power intranet team took advantage of several user research activities to inform its design choices:

- **Card sorting.** Open card sorts with employees helped determine the major sections to use as primary navigation (*Working Here*, *Pay & Benefits*, *Career*, *About Our Company*). Once this level of navigation was determined, closed sorting helped them understand what the subsite structure would look like.
- **Task-based user testing.** Every Friday afternoon for six weeks, the team picked 10 employees randomly and had them perform 10 tasks online using Treejack. After each test, team members reviewed the results with each person and got as much detail as possible about their choices and thought processes as they performed each task.
- **Usage stats.** The team relied heavily on both SharePoint traffic reporting and Google Analytics data to understand how employees used the old site and which areas to focus on for the new build.
- **Meeting with other companies' intranet teams.** Capital Power team members met with two other companies, one a post-secondary institution and the other a public-owned utility. Both companies had recently been through an intranet redesign. Discussions with these organizations focused on platform selection; the redesign process (what worked, and what they'd do differently given the chance); specific site features that had been built (why features were chosen, and whether they were successful); and each project's communication plans (what worked and what didn't).
- **Researching usability or design through books, reports, or other resources.** Two books served as a primary tool throughout the process: Step Two's *Essential Intranets* and *What Every Intranet Team Should Know*. They also consulted two previous Intranet Design Annual reports. These resources informed the decisions the team made on what new features to include on the intranet.

Information Architecture

The team was trying to solve some specific IA problems with the redesign:

- **Both the physical site structure and the megamenu navigation blended task-based and organizational-structure-based navigation.** The designers wanted to do away with both and build a site that was task-based and organized by employee need.
- **Too many options at the top level of the primary navigation.** This was true throughout the navigation, but especially at the top level. More options mean more confusion, so the team reduced the top-level navigation from seven options to four.

- **Reduce the number of links in the megamenus.** With the old site, the megamenus contained links to every page of every subsite, which made them extremely busy. The display was also impractical. With the new menus, they included only top tasks that employees look for most often, with options adjusted based on a review of post-launch analytics.

Adoption and Buy-In

Prior to the redesign, feedback from the organization indicated that users were dissatisfied with the intranet for the following reasons:

- **Poor search experience and quality.** Global site search pulled results from multiple internal team sites (department-level collaboration sites built on the SharePoint platform), which provided often irrelevant and outdated results with no clear hierarchy.
- **Inconsistent design.** Users experienced inconsistent functionality and display from one intranet section to another.
- **Cluttered homepage.** The homepage design was packed with information with no clear hierarchy.
- **Inadequate navigation.** Global navigation was difficult to use and had no visible hierarchy indicators.
- **Global nav was not intuitive.** Users were unable to find information based on the non-intuitive global navigation.
- **Inadequate support for mobile.** The site was not responsive.

To increase buy-in, the team released a comprehensive communications and rollout plan that included the following activities:

- **At project launch:**
    - The team publicized the upcoming redesign and highlighted the current issues that the new intranet would address.
- **During the project:**
    - Each month, the team communicated with mangers about the intranet redesign's progress.
    - Team members engaged with all departments, from initial department meetings with key department stakeholders to requests for content reviews. They kept everyone informed of timeline progress and communicated key messages about which issues the new intranet would resolve.
    - The team met with the CEO and executive team before launch to preview the new site, share the rollout plan, and receive feedback. The executives had realistic expectations, and team members recognized that change always prompts both positive and negative feedback and were fully accepting of both. The executives were pleased with and supportive of the new intranet and rollout plan.

- **Month before the launch:**
    - Leading up to launch, the team sent out weekly communications about the redesign.
- **Day before the launch:**
    - Team members put up posters at all company locations that featured information about mobile access and key intranet features; they also launched a branded campaign “Beauty with Brains” to highlight the new intranet’s enhanced functionality and design.
- **On launch day:**
    - The team distributed “Beauty with Brains” postcards to all employees at all locations. The cards highlighted the features that were designed to address previous staff concerns, as well as enhanced features and how to get help if needed.
    - A short promotional video was released to highlight the new features.
    - The team held an open house learning center at the head office on launch day. Several stations were available where employees could walk through the new intranet’s various features and learn where and how to find information. The stations also featured customized scenarios that let employees find the information and resources that were most important to their specific roles.
    - The intranet’s homepage featured rotating articles that offered assistance and showed intranet highlights, tips, and tricks.
    - The team created a temporary *Where’d it go?* page, accessible from the homepage, that gave users quick access to the previous intranet’s most-used information and pages.
- **First month after launch:**
    - Intranet team members attended each department’s monthly meeting to give a 10-minute presentation on the new intranet’s features, offer usage tips and tricks, answer questions, and gather employee feedback on what was and was not working.
    - Based on this department feedback, team members implemented changes and improvements and communicated those changes to the organization at large.

To entice employees to visit the site after launch, the team did the following:

- The team increased the use of images to accompany new stories, and made sure the images were visible on the homepage. It also began posting news, stories, and information throughout the week to keep the homepage fresh.

- Company activities, events, educational opportunities, and so on were posted on the intranet to help ensure its relevance.
- A weekly email newsletter summarized the week's news and information that had been posted to the intranet and offered linked to those stories on the intranet.
- The team used digital signage screens to advertise the latest news, updates, discounts, deals, and other evergreen information to encourage employees to visit the intranet.

Buy-in after launch was positive; employees had no resistance to using the intranet for news or work-related tasks and ongoing intranet use has been growing since launch.

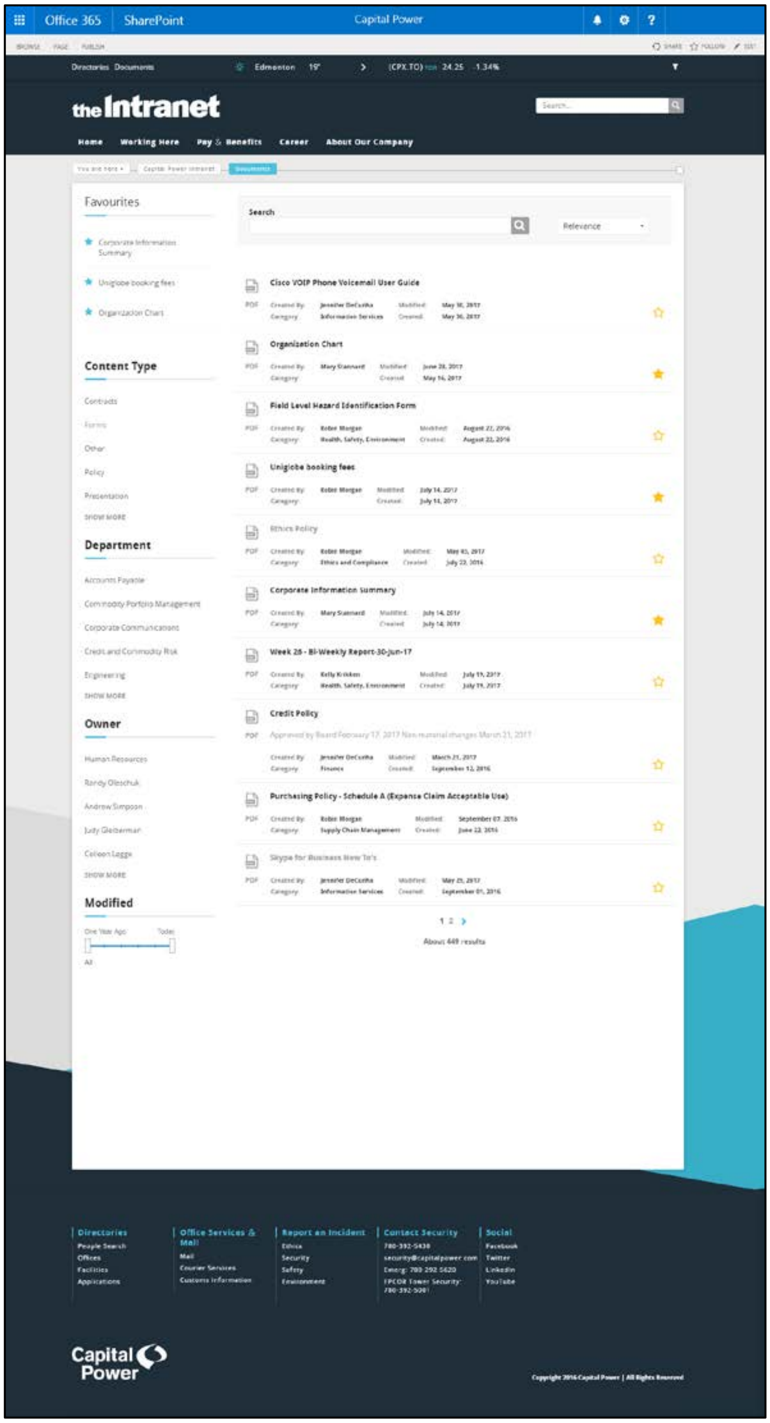


Image 39. Capital Power Intranet Document Search. This search is part of Bonzai Intranet. It searches only centralized documents (i.e. SharePoint Document Libraries) that are part of the document portal site. *39_CP_12_documentPortalSearch_live.png*

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Dynamic Owl	• Provide the Bonzai Intranet platform • Provide technical support during the build and post launch • Provide training for site administrators post launch • Consult on IA and governance structure during the project's planning phase • Build a custom web part to display the "Alberta Pool Price" on the homepage

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Corporate Communications Team	• Provide governance and overall intranet management, and consults with content owners to support and evaluate direct country managers • Develop the intranet's structure, content, and features • Ensure search effectiveness through proper site and document structure • Manage department editors and train new editors on the intranet software • Audit department content annually and provide analytic reports to department content editors • Work with department content editors to update content, including updating and auditing Corporate Communications (CC) content and resources • Identify new features and tools to enhance the intranet
Department Content Editors	• Update content and documents • Review analytic reports provided by CC • Work with CC to communicate department needs
Department Content Owners	• Ensure accuracy of their content • Approve content prior to it being posted on the intranet • Review analytic reports provided by CC • Review content on schedule • Discuss content additions and expansions with CC • Select and oversee editors • Notify CC of changes to editors • Ensure that editors complete SharePoint basic training • Identify new content

SharePoint Support Team	• Liaise with Bonzai support • Provide SharePoint environment support • Maintain SharePoint environment • Develop SharePoint-based solutions or find SharePoint- or Bonzai-compatible solutions to business problems • Train employees on SharePoint
Bonzai Support Team	• Provide technical support and trouble-shooting for Bonzai platform issues • Provide support for new releases of the software • Integrate the Core Team's feedback into future enhancements to the software

Corporate Communications owns the intranet, which gives the intranet team creative freedom to structure the intranet and make changes as it sees fit in response to employee needs. This ownership also means very little red tape. Further, because Corporate Communications owns much of the content that is intended to engage employees on a daily basis, it makes sense that it would own the intranet as a whole.

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	intranet.capitalpower.com The URL works on all devices internally and externally.
Default Status	Capital Power employees have both Chrome and IE11 installed on their computers by default. • For IE, the intranet is set as the homepage and cannot be changed. • For Chrome, the intranet is set as the homepage by default, but employees can change it if they wish.
Remote Access	The intranet can be accessed externally without logging in to the network by going directly to intranet.capitalpower.com. However, for security reasons, two-factor authentication (through Entrust) is required. This additional security requirement has led to incredibly low mobile traffic: since launch, less than 1% of intranet traffic has come from mobile devices.
Shared Workstations	All power-generation facilities have shared workstations for employees; common tasks include: • Coding time • Checking work email • Checking the intranet's *News & Announcements* and the *Upcoming Events* sections • Saving information on team sites • Online training • Finding information on parts or tools used at the plant

TIMELINE

PROJECT MILESTONES	
Item	**Status**
July 9, 2009	• Company IPO: first intranet launched on the SharePoint 2003 platform as a spin-off of the parent company's intranet
October 6, 2011	• Intranet redesign project initiated
August 20, 2012	• A redesigned intranet on the SharePoint 2010 platform launched
September 2014	• The intranet is migrated "as is" from SharePoint 2010 to SharePoint 2013 onsite
Fall 2015	• Intranet identified as a 2016 project to migrate to SharePoint 2013 in Office 365
January 2016	• Intranet redesign communication to company begins
February 2016	• Meeting requests initiated with departments
February–August 2016	• Meetings held with departments • Content audited and reviewed • Ongoing engagement and communication with departments
April 13, 2016	• First demonstration of Bonzai (later selected as vendor)
May 11, 2016	• Kick-off call with Bonzai
July 2016	• Bonzai intranet software available for core team to begin learning • Ongoing department contacts identified (content owners and editors)
July 19, 2016	• Content migrated to the new platform; any future content changes must be made to both the existing and new intranets
July–August 2016	• Intranet built in Bonzai/SharePoint • Content reviewed with departments • Intranet editor training and governance sessions held • Intranet content owner governance sessions

	held
August 1–15, 2016	• Launch communications developed • Post-launch meetings scheduled with business units
August 22–September 2, 2016	• Core team tested new intranet navigation and functionality • Refinements made prior to launch
August 30, 2016	• Features, navigation, and functionality tested pre-launch with a small group of employees
September 7, 2017	• New intranet launched
September 7, 2017	• Launch day help center held
Overall redesign timeframe: Seven months	

CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Contributors	The intranet has 11 general contributors: one from each department that provides a significant amount of site content, and six editors from the three HR areas. The three site owners are all from Corporate Communications. The content owners select the editors. Generally, editors are the administrative assistants who work with their department's subject matter experts to review and curate content, but several departments' subject matter experts also serve as their editors.
Contribution	Corporate Communications is responsible for curating corporate news and working with departments to identify their communication needs within the organization. Monthly meetings are held with major departments to identify upcoming events, projects, changes, or programs that should be featured on or accessed from the intranet. The intranet team also works to develop close relationships with admins at the company's remote locations to ensure they have support for their local communications requests, as well as to give them updates on events and other local news and information that should be posted on the intranet.
Training	Training was conducted when the new intranet launched. The team maintains a close, supportive relationship with editors to help them with their content management needs. One-on-one refreshers are conducted as needed either in-person or as remote one-on-one training sessions, and they include information about governance. Refreshers are also conducted when a new person takes on the role of editor.
Management	Content and document audits are conducted annually and use analytics to measure content traffic. Audit results are presented to the editors, who then report up to their department's content owners for review and response. Editors make the small changes, and work with the core intranet ownership team to make larger changes to content and structure, including to remove or add pages. Time-bound updates or reminders are set to unpublish after a set period so they won't appear in search results and give users dated information.

	The intranet team identifies changes that are needed to department processes, procedures, and content during monthly meetings with departments.
Maintaining Quality	The team has several approaches to ensure that content quality is maintained over time: • Core intranet owners review analytics data weekly so they can evaluate employee interest, trends in viewership, and how content display or location changes impact views and longer-term trends. • Team members use a "single-source" approach to information on the intranet — that is, they don't duplicate information from one location to another. Related content is linked to other related content, as opposed to recreating the same content on multiple pages. • Each page has a built-in form so users can provide feedback on content. • The core content owners provide feedback to departments as content needs are identified or as pages are submitted for approval. Guidance on writing for the web, effective layout, and/or how to adjust the information's presentation is provided once the content is submitted for review before publishing. • One basic principle guides the team's evaluation as to whether or not content is appropriate for the intranet: It must provide relevant company or business information, news, events, or work- and culture-related resources that should be made available company-wide.

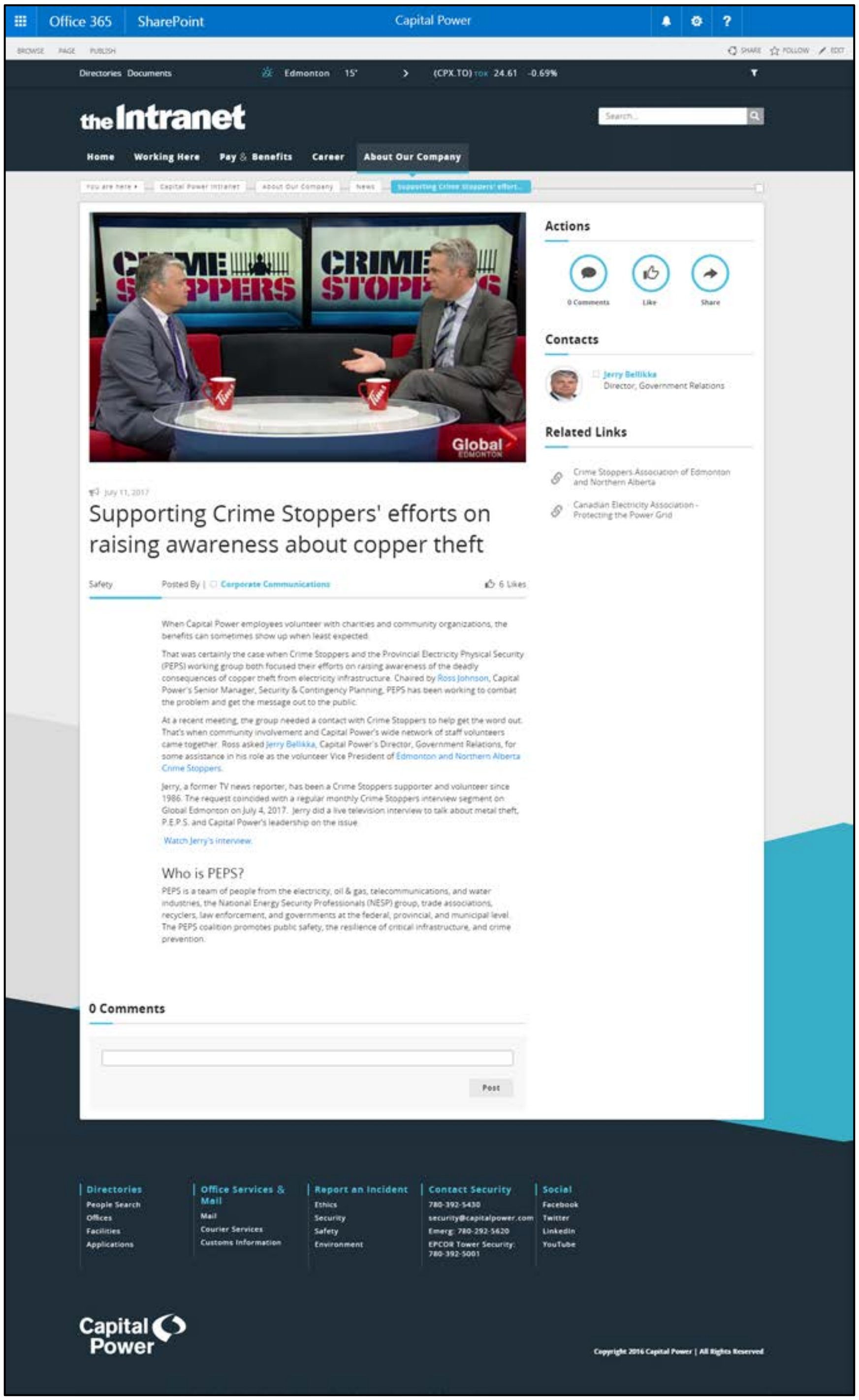


Image 40. Capital Power Intranet News Article Page. An example *News & Announcement* page, which users see when they click through from the homepage. These pages can be targeted by location and/or security and trimmed by job role if required. *40_CP_13_NewsArticle_live.png*

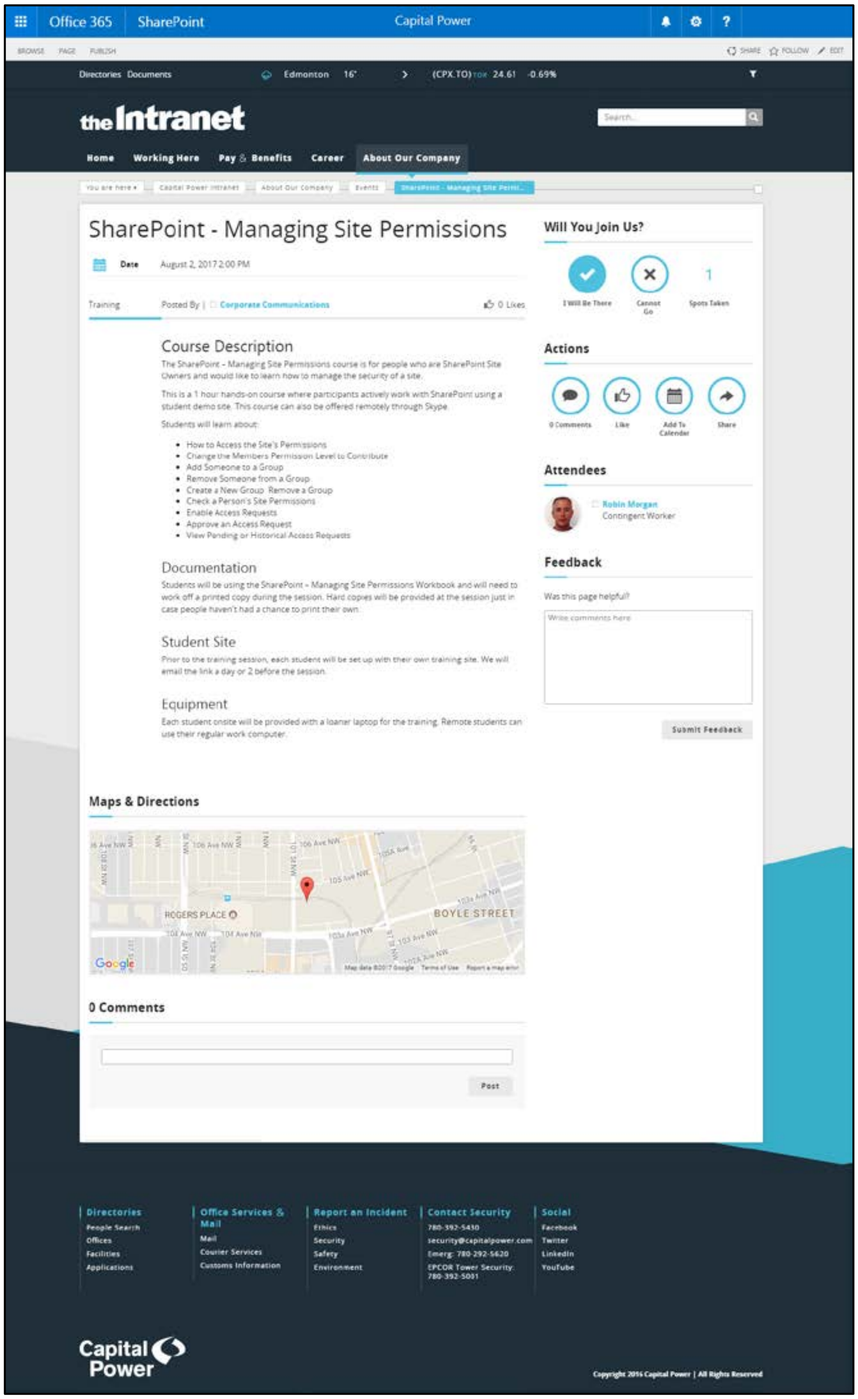


Image 41. Capital Power Intranet Event Post Page. Event posts let employees register for events directly from the page and see how many spaces are still available for the event. *41_CP_14_EventPost_live.png*

Culling Content

The team took an active approach to ensure that the redesigned intranet launched with fresh, relevant content rather than simply porting all the old stuff over.

This process began by breaking the entire intranet into sections according to department ownership. The team created a document listing each department's content; that document linked to an excel sheet that showed which other content was linked to that content and the total page views of each piece of content.

Team members then reviewed the content and indicated which content they felt could be removed or shortened without compromising the intranet's completeness and quality. With this information in hand, they met with department stakeholders, from VP-level people to administrative assistants. First, team members invited each department's top-level stakeholders to a meeting, indicated its purpose and asking them to invite other members of their department who would be good at evaluating the content. During those meetings, team members reviewed the new intranet's goal and outlined the redesign approach — that is, create a task-based intranet of essential resources that supports employees in their daily tasks. They also discussed the process they would use to identify the most valuable content for the new intranet and asked stakeholders to review their own complete library of documents, identifying what to keep, update, or remove.

The team took a strategic approach to these outreach efforts. It began with the smallest department areas first and moved through the company as department schedules allowed to meet with the required people.

Intranet team members cross-referenced the new content with the old to avoid losing any content in the review and migration process. Most old content was rewritten by the department, then reviewed and edited by the Corporate Communications team to be as concise and web-friendly as possible. They maintained an excel spreadsheet throughout this process to track whether content was migrated as-is, updated, or removed.

Due to organizational restraints, team members met with the largest content stakeholder group — HR — last. Meeting with HR earlier in the process would have been better, however, as its content needs and requested changes often overlapped with information owned by other departments.

As of launch day, the old intranet became unavailable to the general employee population, but the Communications team maintained access. This choice has proven invaluable when departments have questions about old content that they decided not to move. The Communication team's ability to access old content lets them quickly reference it and, in some cases, migrate that content to the new intranet.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Bug Tracking / Quality Assurance	• The SharePoint technical team uses Service Now to manage all support requests. • A feedback form available on every intranet page alerts the Communications team when new items have been submitted; requests/changes are sent by email.
Design Tools	• Photoshop, Illustrator, SnagIt
Testing	• Treejack, Optimal sort
Site Building Tools	• Notepad ++
Content Management Tools	• SharePoint Online/Bonzai Intranet
Search	• Search Center for SharePoint Online • Bonzai search
Video Production	• Final Cut Pro
Reporting	• Google Analytics, Tag Manager, Search Console, SharePoint Popularity and Search Reports, iPerceptions 4Q (bimonthly customer satisfaction survey), Bananatag Email Tracking

Technology Evaluation Process

A key reason that the intranet project became a priority was because the organization was upgrading from SharePoint 2010 to 2013. This upgrade broke many of the old intranet's customizations to both its look and feel and functionality. At that time, the Information Services team didn't have a technical resource dedicated for intranet maintenance and support, so many technical requirements remained unfixed for nearly a year. When the redesign project kicked off, it was abundantly clear that no matter which option it chose for the intranet, the team had to be certain that the site would never end up in a similar state/situation again.

The team had three options for the new intranet's technology approach:

Option 1 – Use SharePoint online as the platform

It could hire an external agency to help build custom display templates that would be responsive, and purchase third-party web parts for any additional functionality needed that wasn't part of SharePoint (e.g., megamenus, dynamic left navigation, news carousel, quick poll, and classified ads application).

> **Issues with this approach:** After a month of testing more than 20 web parts, the team couldn't find any that would meet their functional or business requirements without significant customization (which is what it wanted to avoid). Also, having an agency build responsive display templates would be more expensive than anticipated.

Option 2 – Move the intranet off SharePoint completely

With this option, the team would move the intranet off SharePoint completely and choose a CMS with a predefined set of intranet-specific features and functionality. For this option, it was considering the Kentico CMS.

> **Issues with this approach:** The only issue with this solution was cost. The team found a tool it liked that met 90% of the project's functional and business requirements; however, in addition to user licenses, moving off SharePoint would entail additional infrastructure costs. Capital Power had chosen SharePoint as a company-wide platform to meet business needs, so there was not a strong enough business case to justify the high cost of Kentico and moving away from SharePoint. The need and demand was not there.

Option 3: Use an out-of-the-box intranet solution built on top of SharePoint online.

> **Solution:** When the project first began, the team didn't have a third option. Out-of-the-box intranet solutions were just starting to appear on the market and many looked too good to be true. A colleague suggested they contact Dynamic Owl and request a demo of Bonzai. Shortly thereafter, they were given a Bonzai site that they could use to build and test against their requirements. After two weeks, they knew this would be the best approach. Bonzai Intranet met more than 95% of the project requirements, and the licensing costs were very reasonable considering the features and functionality the tool included. The team also really liked the continuous improvements included as part of the licensing fee. Over time, the site would constantly be improving its available features and functionality. With a custom intranet, it would have been the exact opposite: it would begun degrading shortly after launch and would require the budgeting of an annual contingency fund to keep the intranet up-to-date.

ROI

The new intranet has been deemed a success on several fronts:

- Overall page views to the *News & Announcements* and *Events* pages are up; from a Communications standpoint, this is a success and lets the company disseminate information as widely as possible.

- Support emails and phone calls have dropped dramatically, reducing the need for support resources and helping reduce the amount of time it takes employees to complete business tasks.
- Page views of employee milestone profiles rose to more than 15,000 in the first half of the year, with spikes in views to the profiles on the days when recipients are announced in the employee e-newsletter. By comparison, all of the previous year's milestones profiles had only 553 page views total.
- Document portal use has improved and document management is simpler. This helps facilitate search and makes it much easier to ensure that only current versions of each document are available on the intranet.

Measuring Hard Numbers

A comprehensive monthly report contains everything team members report on monthly and the rationale behind measuring each statistic and how it relates to the redesign project's initial goals. This comprehensive report is built using data from SharePoint's Popularity & Search Reports, Google Analytics, Tag Manager, Search Console, and iPerceptions 4Q survey.

LESSONS LEARNED

The team shares what it learned and offers advice for other teams:

- **Talk to security first.** "It's important to understand how external access will work for your intranet. Building a site that was responsive was a major requirement of our redesign project since close to 50% of employees have limited access to a workstation. Our Information Services team was heavily involved throughout the entire redesign process; however, our IS security team was not engaged specifically about external security access early on. Two weeks before launch, we were informed that second-factor authentication would be required to access the site outside of the network. Instantly, we knew that mobile would be highly impacted."
- **Write the communications plan at the beginning of the project.** "Communications to employees throughout, and especially at the end of a redesign project, is critical to its success. However, what typically happens is that all the planning is left until the end of the project when you are the busiest working to get your project completed on time. Detail a thorough communications plan at the onset, which simplifies communications when everyone is working double time."

- **Provide very organized documentation, data, and supporting analytics.** “When meeting with departments, spend time preparing the presentation and explanation. We began with the rationale for the project and the goals for the redesign, which explained our approach. We provided very organized reports showing which content (documents and pages) each department owned, and traffic/consumption of their content. Showing low engagement with content supported our suggestions to either remove irrelevant content or restructure so that important content would be more easily found by employees.”
- **Test as much as you can.** “The new menu design was refined using iterative testing using Treejack where we tested the IA against common task completion. After the first few rounds of testing, we started to realize that solving one problem can sometimes lead to issues in other areas. Retesting weekly gave us the opportunity to continuously refine and improve the structure and naming conventions throughout the design phase of the project. My advice: test as much as you can, as often as you can throughout the planning and design phase of your project. It really doesn’t take that much time or that many people; you will quickly start to identify patterns in how employees think about the content, and you learn something new from every employee you work with.”

Best Practices

- **Include as many people as possible in the redesign process.** “As part of the redesign, we decided to rewrite all the content for the new intranet, which meant working with a lot of people at different levels of the organization and from every department. Over 175 people from across the company participated in the intranet project, providing input, updating content, and testing the structure and the site. By the time we launched the Intranet, most employees were completely up to speed with what was happening and we automatically had buy-in, because they had been involved in the process at some point during the content audit, ownership review, and editing work that was completed.”
- **If possible, simplify your governance structure.** “The old intranet site followed the typical SharePoint governance structure, where each site is owned by a department and people from that department are assigned edit and approval permissions. With the new site, we wanted to simplify governance as much as possible so that we could ensure our groups remain up-to-date. We ended up creating two editor groups (defined by the level of access required) and then applied them against the entire site. This has made it incredibly easy to keep our list of editors up-to-date — we’re only working with two lists.”

- **Measure what's actionable.** "In addition to the typical traffic analysis reports, we've also begun running monthly reports for broken pages, abandoned search queries, and zero results. These reports have allowed us to continually improve the quality of the intranet. Missing pages and broken links are fixed, sometimes page titles are changed, or new pages are created on the site to reflect the search queries employees have used to find information. Since we began working through the results of these reports, we have seen a drop in problems in all areas."
- **Stop doing more and start doing better.** "At the beginning of the project, we decided we didn't want to introduce a lot of new features and functionality with the launch of the new site. Instead, we wanted to focus more on doing a better job with tools we already had and start to introduce additional features post launch."
- **Make the intranet as future-proof as possible.** "During the planning stage, we focused a lot on sustainability: How do we stop the intranet from degrading over time? Here are some of the key things we focused on:
    - Update all site content and develop a process to ensure content owners and content remains up-to-date
    - Develop a process to ensure the list of editors remains up-to-date
    - Ensure search results remain relevant and helpful
    - Simplify how *News & Announcements* and *Events* function and will be displayed on the homepage."

Delta Air Lines

OVERVIEW

COMPANY

Founded in 1924, Delta Air Lines has grown into one of the world's largest global airlines, helping more than 160 million travelers get to the places they want to go to each year.

Headquarters: Atlanta, Georgia

Locations where the intranet is used: Worldwide

Company locations: Worldwide

Annual revenue: For 2016, Delta reported $39.64 billion in operating revenue with $4.37 billion in net income.

THE INTRANET

Users: There are approximately 260,000 total intranet users, including the 80,000 employees noted above, as well as retirees, contractors, and partners.

Mobile approach: Responsive web design

Technology platform: SharePoint Online

DELTA TEAM — INTRANET

Leadership: Susan Hayes

Design (Creative Services): Dustin Sieber

Training, Communications, Business Readiness, Reporting: Cheryl Rakestraw, Faith Fagan, Kimberly Bridges, Almeda Andrew

DELTA TEAM — INFORMATION TECHNOLOGY

Leadership: Prasuna Kolachina, Indu Nair

Development: Amish Shah, Ryan Taylor, Alicia Vickery, Abhishek Tyagi

Project Manager: Gail Miller

SLALOM CONSULTING TEAM

Leadership: Dan Keeling, Steven Carrington

Training, Communications, and Project Management: Jelena Fordella, Amy Roberts, Joe Oriano

Support: Heath Ehret, Dave Kuehling

Development: Scott Abelmann, Paul Brennaman, Jamie Moore, Kevin Taitz

INTRANET TEAM

Team members shown here (left to right): Dustin Sieber, Cheryl Rakestraw, Almeda Andrew, Susan Hayes, Faith Fagan, and Kimberly Bridges.

HIGHLIGHTS ABOUT THIS WINNER

Delta's new intranet started with a site crash. Although the team had struggled to secure funding for a new intranet, progress was jumpstarted when the existing intranet crashed, leaving the company without the site for 48 hours. This, combined with a funding structure change and support from the CEO and COO, was the spur for the redesign.

The Delta intranet, called *Deltanet*, supports 80,000 Delta employees, but supports 260,000 people in total, including employees, retirees, contractors, and partners. The responsive, SharePoint-based site was created by a 16-member team from Corporate Communications and IT. The team faced numerous challenges, but still managed to create a site that supports employee activities and core tasks with a consistent, intuitive experience from any device, anywhere, at any time. The site retained its old name, but with a lowercase *n* — changing from *DeltaNet*, which emphasized the technology (Net) — to *Deltanet*, which emphasizes community.

- **Governance.** The previous site was quite old and much of its content was outdated. A huge challenge for the team — and one it continues to face — is finding the right amount of governance. Because the team can't ensure that everything on the site is compliant, it currently focuses on issues that make the biggest impact, asking: *What things are so critical that if they are out of compliance, it will create a significant user-experience problem*?
- **Content training.** More than 500 authors create content for the site; as is true at many organizations, many have no writing background and creating content is not part of their primary role. To help them prepare, content creators are required to take a cyber-security class and a class on writing for digital consumption, which covers content management, search-engine optimization, and writing for mobile. In the move to the new site, content was cut in half, quality improved, and, because the content is better indexed, the site search is also more successful.
- **Look and feel.** Influenced by the external marketing campaign and current internet trends, the team chose a flat design, which limits the use of borders, shadows, and 3D elements. Larger text and additional spacing make the site clean and easy to read. Use of photography and strict enforcement of image standards are important aspects of design, though maintaining the image standards is a big challenge for the team.

BACKGROUND

Delta Air Lines' intranet, Deltanet, is designed to provide employees, partners, and contractors a consistent, intuitive experience with secure, easy, anytime/anywhere/any device access to company performance, leader messaging, news, events, applications, and information necessary to perform their jobs. Deltanet also serves to keep Delta retirees updated on pertinent campus events and information.

All of this is important work, yet prior to the redesign, this critical tool was badly outdated and employees across the organization knew it needed a complete overhaul — soup to nuts — from the underlying technology to the content and design. At the time, the intranet was running on 10-year-old technology and hosted content that was not only outdated, but also looked as if it were written 20 years ago.

Knowing that an intranet needs an overhaul and having the budget to fix it are sometimes competing priorities, particularly in companies of this size where funding can often be a complex, lengthy process. This is particularly true if the project is not directly related to revenue. So, while Deltanet's information is time sensitive and includes policy information needed to interact with customers, assigning a true value proved to be subjective at best. As a result, funding for a new platform was not approved, even after many attempts.

After the intranet became unavailable for 48 hours, however, it became very clear that a new solution was needed; failure of the old platform thus served as the catalyst to deliver a replacement.

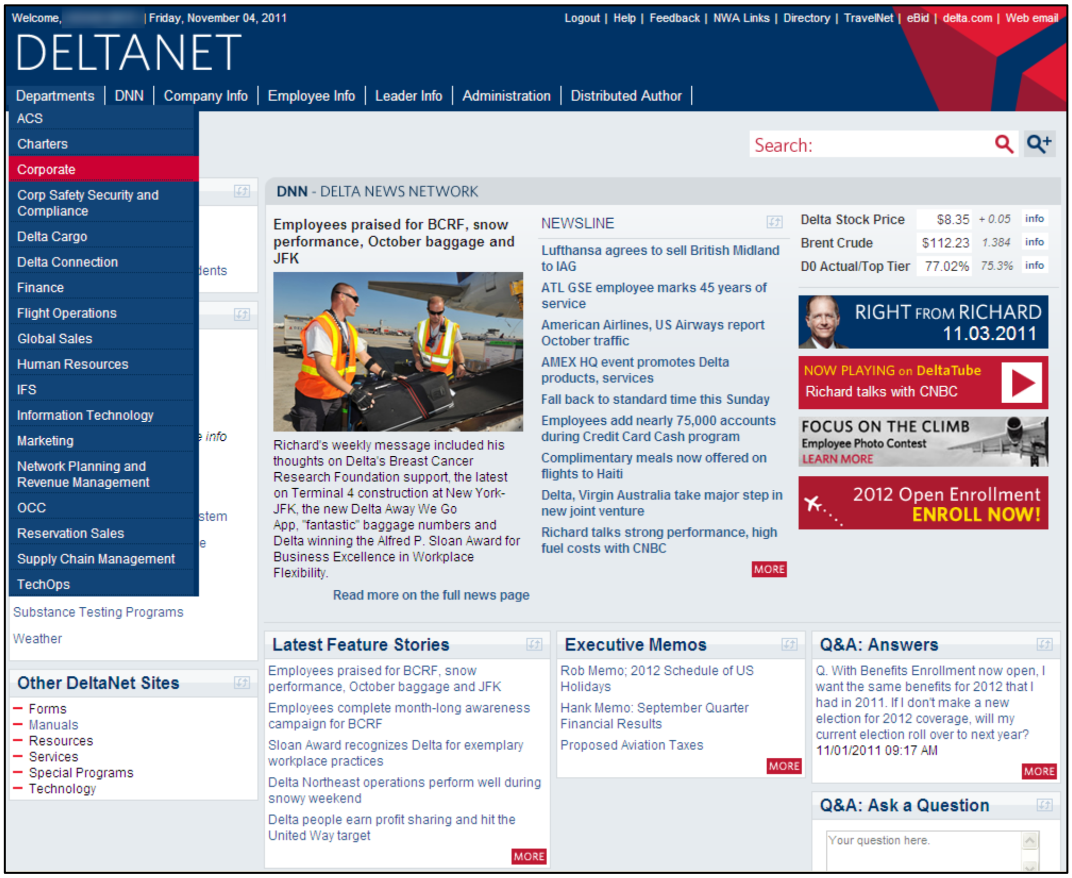


Image 42. Delta Air Lines Intranet Old Homepage 2011. This version of the DeltaNet homepage, from November 2011, had a Corporate news box duplicated on all division pages, making the distinction between divisional pages difficult to discern and the UX sub-par. Lengthy menus and an unresponsive site also created a challenging mobile experience. *42_Delta_01_Homepage_Version1.png*

Image 43. Delta Air Lines Intranet Old Homepage 2004. Although it was considered cutting edge at the time, obtuse navigation on the left side, combined with a small column housing the most-frequently changing content was a design far from ideal. *43_Delta_02_Homepage_Version2.png*

DESIGN REVIEW

Homepage

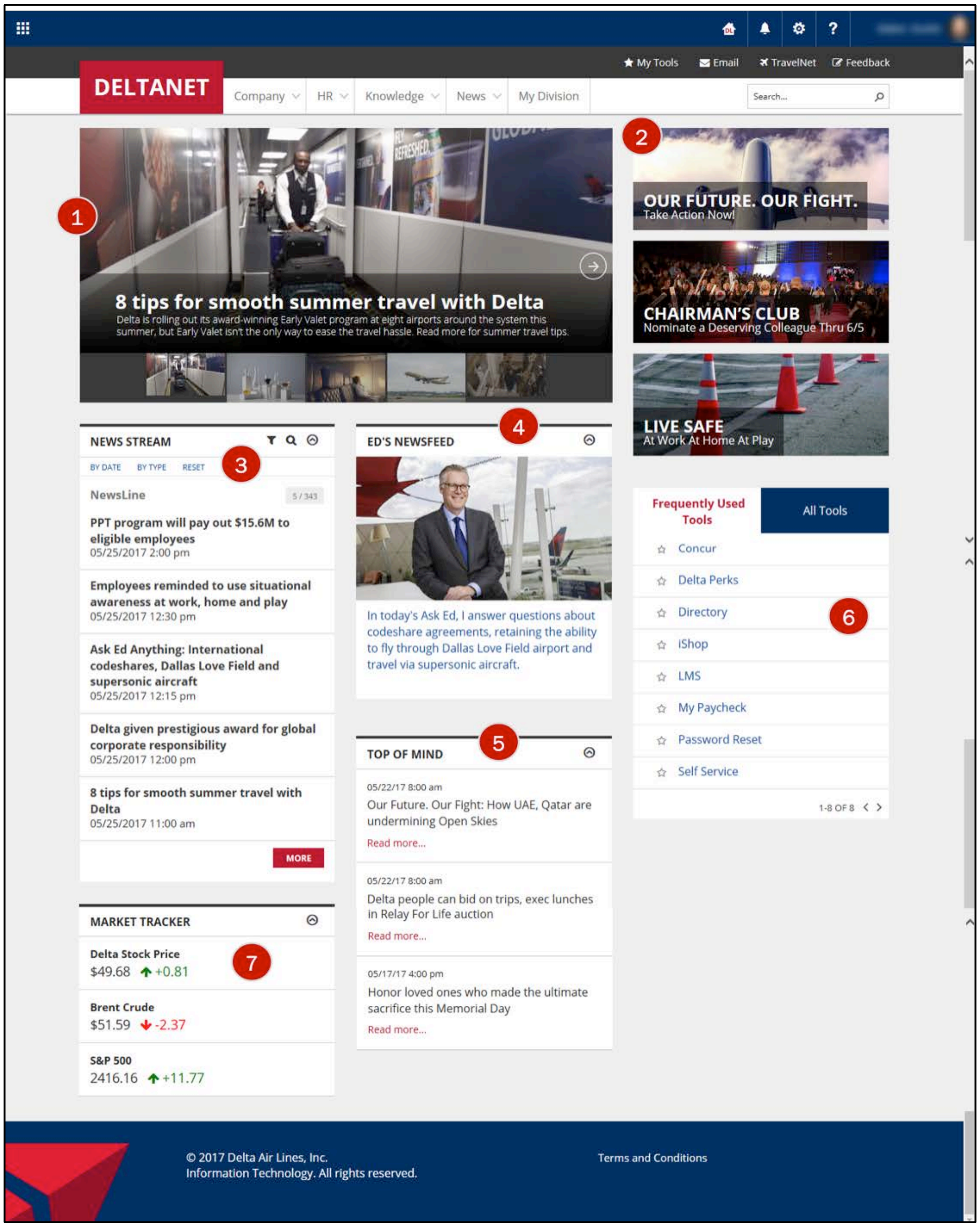


Image 44. Delta Air Lines Intranet Homepage. Deltanet's homepage focuses on up-to-date news and campaigns, and offers quick access to frequently used tools. *44_Delta_03_Homepage_Live.png*

Homepage Highlights

1. **News carousel.** The homepage features a news carousel that highlights up-to-the-minute news of interest to all employees. The carousel is indicated by an arrow in a circle on the item's right side, as well as by a filmstrip view of additional stories that appears at the bottom of the carousel. This lets users know there is additional content and provides a quick visual way to navigate to other items. Each item features a photo and an overlay with a headline and short summary of the content.
2. **Campaigns.** The page's upper-right corner is devoted to internal campaigns and highlights temporary feature content that includes a representative image, a headline, and a subhead. Visually, it is very similar to the treatment of the news items. These areas promote actionable initiatives to employees, encouraging them to participate.
3. **Additional News.** The *News Stream* offers additional news, with each item including a headline and the date and time it was posted. Users can sort items by date or type, and the total number of items is listed in the top right corner. Users can also search content specific to the *News Steam* via the magnifying glass icon in the top right corner.
4. ***Ed's Newsfeed*.** Ed Bastian is Delta's CEO, and *Ed's Newsfeed* features his latest content. Sometimes, this content is the latest installment of *Ask Ed*, an intranet feature in which Bastian answers employee questions via video.
5. **Ongoing news and events.** The *Top of Mind* section highlights important ongoing news or events that have rolled out of the news carousel and *News Stream*.
6. **Tools.** Frequently used tools are listed on the side of the page in alphabetical order. The user can also tab to the *All Tools* view in the upper right corner. The tab clearly indicates which section is currently selected by using the same background color (white) to visually connect the selected tab and the content that appears below it.
7. **Market information.** A *Market Tracker* rounds out the page and includes the Delta Stock Price, the cost of Brent Crude, and the status of the S&P 500.

Navigation

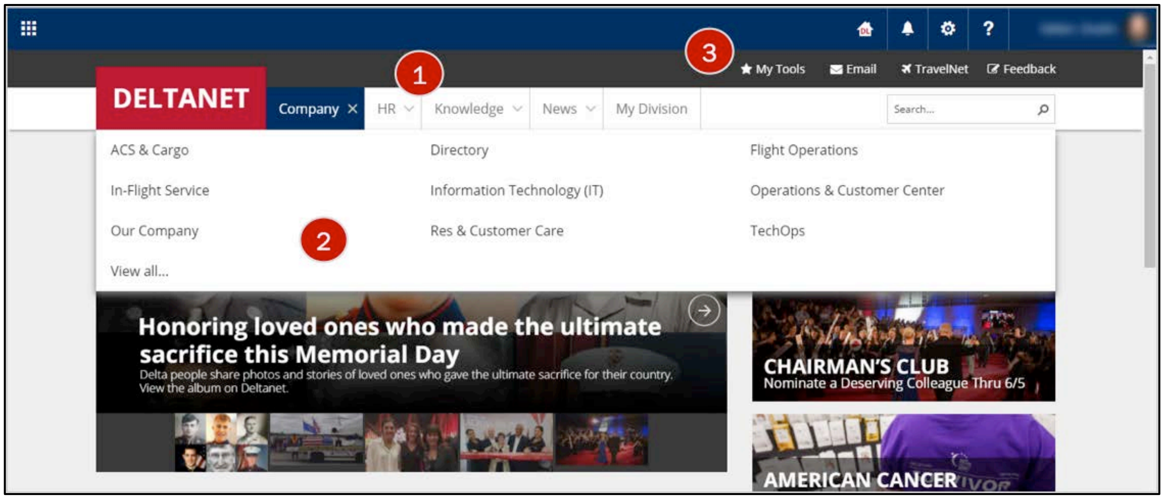
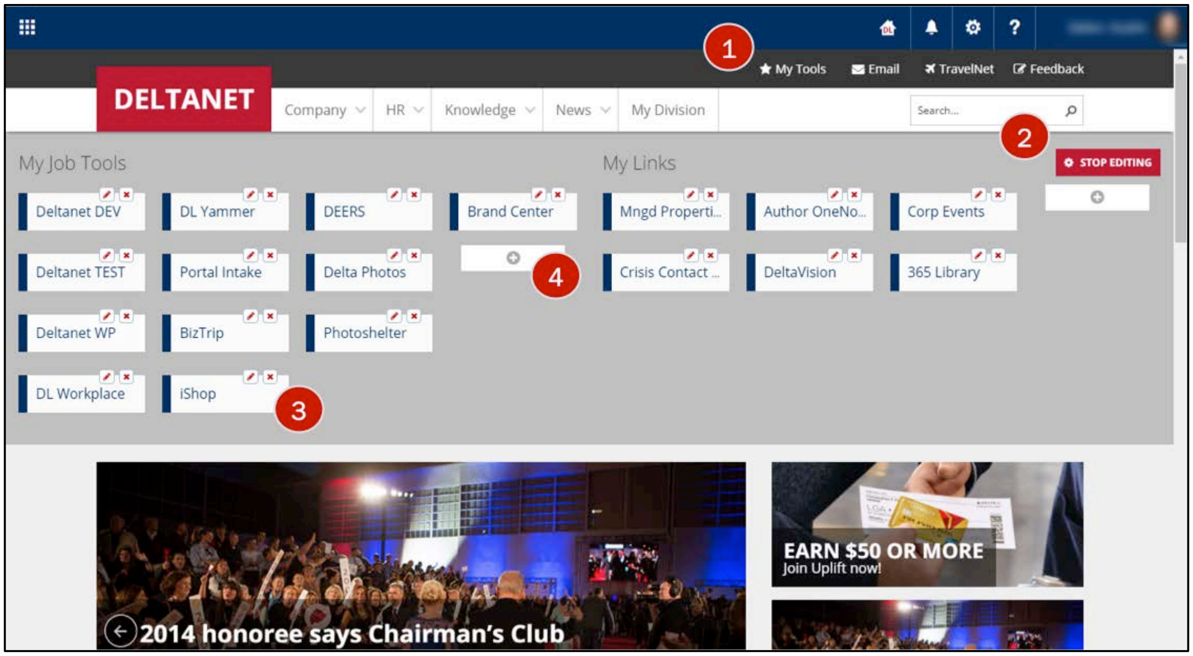


Image 45. Delta Air Lines Intranet Navigation. The site uses a megamenu navigation to let users see an overview of each section's content.
45_Delta_04_GlobalNavDesktop_Live.png

Navigation Highlights

1. **Employee-focused categories.** Navigational categories include *Company*, *HR*, *Knowledge*, *News*, and *My Division*. *My Division* is automatically set to the user's division based on the user profile. This is the universal navigation that appears on every site page.
2. **Megamenu.** The desktop navigation uses a megamenu to show users the subcategories within the main navigational category. The menu highlights the most important content within a section, with a *View All* option to see additional content.
3. **Additional links.** The top of the page also provides persistent links to a customizable list of links: *My Tools*, *Email*, *TravelNet*, and *Feedback*. Placing the *Feedback* link with these other essential areas shows the importance the team places on hearing from users.

My Tools



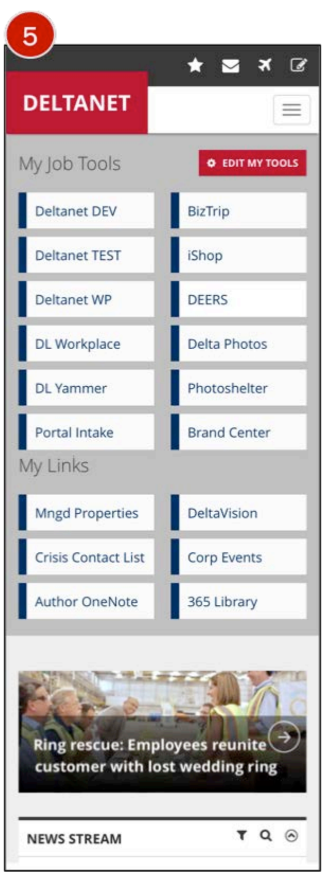


Image 46. Delta Air Lines Intranet My Tools. *My Tools* provides a personalized view of tools for users. They can customize the view to create shortcuts to information and tools that are important to them. *46a_Delta_05a_MyToolsEdit_Live.png* and *46b_Delta_05b_Mobile_MyTools_Live.png*

My Tools Highlights

1. **Tailored to employees.** The *My Tools* area is tailored to each user, offering quick access to essential tools. With 80,000 employees, different features and functions are important to different employees. Having tailored links helps streamline the UX.
2. **Customizable.** Users can remove, add, or reorganize the *My Tools* links. A button in the upper right corner lets users switch in and out of edit mode, as needed. The prominent *Edit My Tools* button clearly tells users what they can customize in a given site area.
3. **Edit mode.** When users are in edit mode, they can edit an existing item by clicking on the pencil icon or remove an item with the X icon.
4. **Adding items.** To add an item to the list, users can click on the box with the plus sign. Users can save links internal or external to Deltanet. The *Frequently Used Tools* web part lets users "star" the links they need, which automatically adds them to the *My Tools* area.
5. **Mobile.** *My Tools* is also available on mobile devices, as the site is fully responsive. Users can see their personal list of tools and links on mobile, with the same editing functionalities. The boxes that outline each item in the list act as easy tap-targets for users on touchscreen devices. Every page was designed from a mobile-first mentality to ensure it worked well on mobile and wasn't just a smaller version of desktop.

Knowledge Management

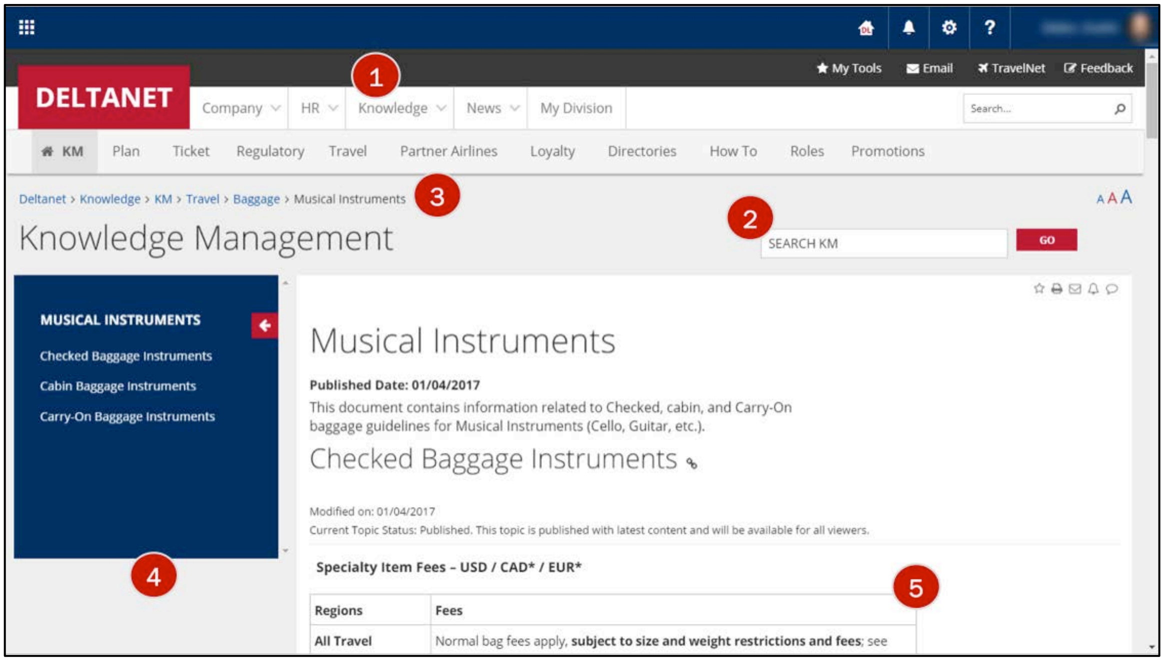
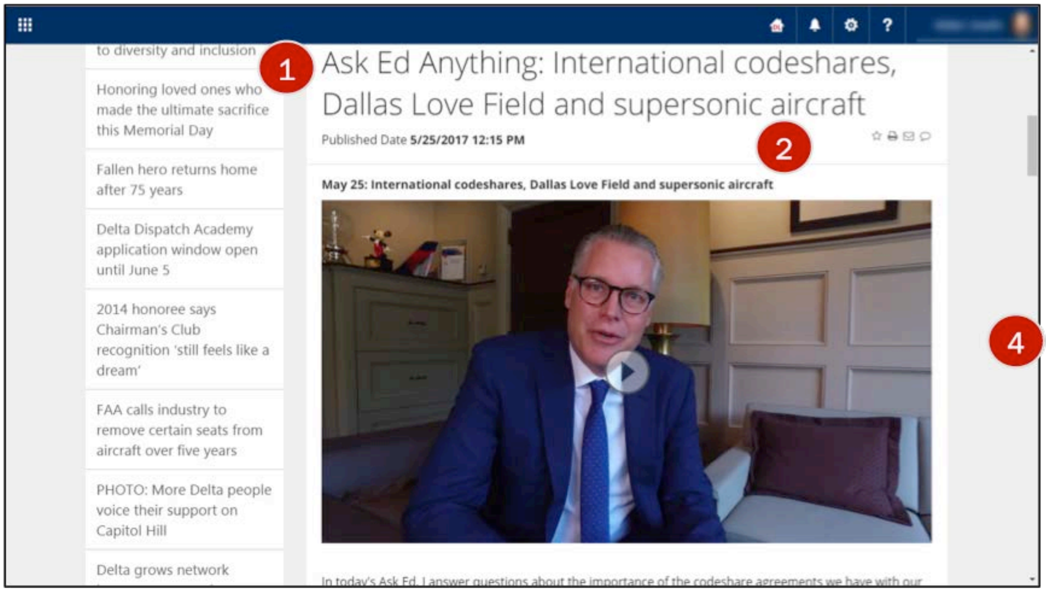


Image 47. Delta Air Lines Intranet Knowledge Management. The *Knowledge Management* section provides content for employees who assist passengers. As such, it includes many features — including sticky related topics and a section-specific search — that help employees assist customers as quickly as possible. *47_Delta_06_KM-BeforeScroll_Live.png*

Knowledge Management Highlights

1. **Easy to locate.** The *Knowledge Management* site area helps employees in assisting passengers. Because this is a key company function, the section appears in the global navigation.
2. **Search.** *Knowledge Management* has its own search within the site because information must be found quickly. In customer service, all interactions are time-sensitive. This section-specific search appears in the body of the page and includes the filler text “Search KM” to help differentiate it from the site search that appears at the top of the page.
3. **Breadcrumbs.** Breadcrumbs at the top of the page allow quick access to higher-level information and also signpost the user’s current location.
4. **Topic menu.** A collapsible topic menu appears on the side of this page. This blue box includes links to related topics and sticks in place as the user scrolls, letting them jump from topic to topic as needed to save time — a key factor when users are assisting customers.
5. **Clear writing and formatting.** Information is easy to read and is displayed in tables where appropriate with clear headings and simple, succinct text. The use of bold helps key words and phrases stand out.

Video



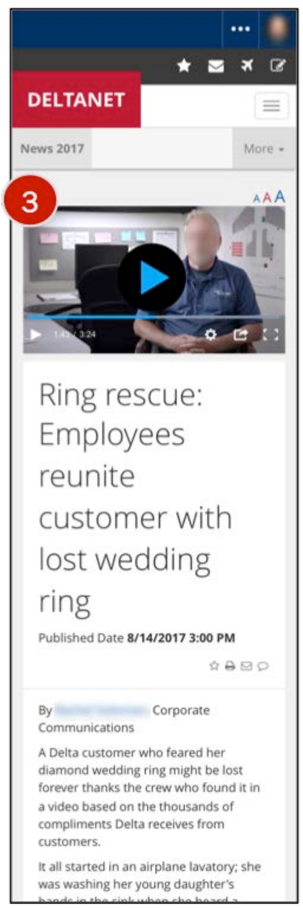


Image 48. Delta Air Lines Intranet Video. The site includes video throughout, including *Ask Ed*, which features the CEO answering employee questions. The site also offers video to supplement news stories. *48a_Delta_07a_CEOVideo_Live* and *48b_Delta_07b_Mobile_VideoStory_Live.png*

Video Highlights

1. ***Ask Ed*.** In this site feature, the CEO of Delta Air Lines answers questions submitted by employees. Such a feature works well when the featured leader has an outgoing and entertaining personality such as his. In each video, he answers several questions from around the company, some submitted as videos and some as text, on topics ranging from international codeshares to his favorite book. Using video communication adds a personal element to the responses and also gives employees a way to connect with a leader.
2. ***Ask Ed* title.** The title of each *Ask Ed* video explains what he will be discussing; the date and time the content was posted is also included.
3. **Supplemental video.** Some site stories are supplemented with a video clip, as in this mobile example. The video appears at the top of the story so users can read, view, or read and view each story.
4. **Video players.** Video plays within the page on desktop; on mobile, it plays full screen after users hit the play button.

Search

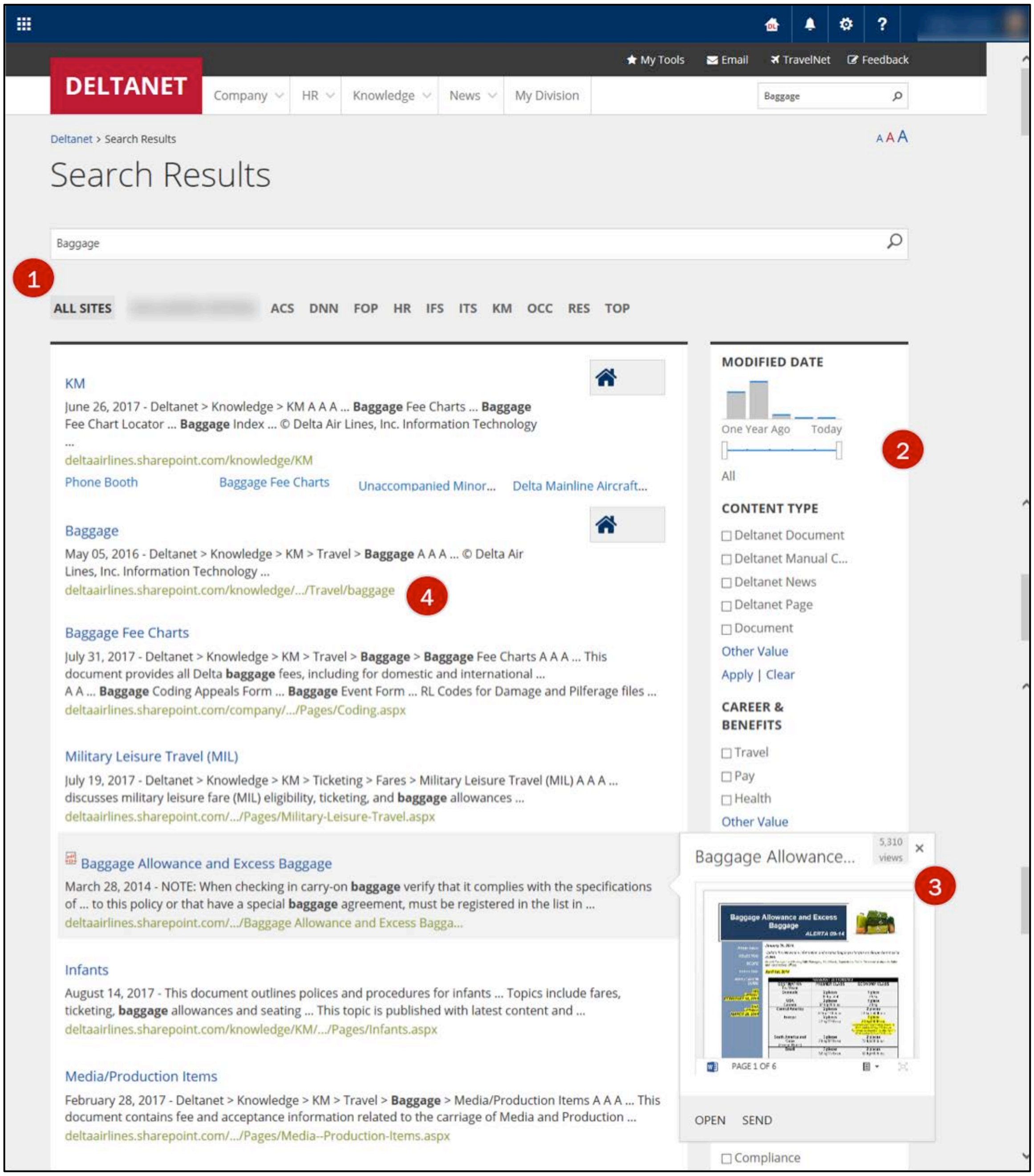


Image 49. Delta Air Lines Intranet. Site search allows users to segment results by division, date, content type, and category of content. Improving content has gone a long way to improving search results as well. *49_Delta_08_SearchResults_Live.png*

Search Highlights

1. **Scoped search.** The search tool is global by default, searching all areas of Deltanet. If a user wants to narrow results to a specific division, division abbreviations appear above the search results.
2. **Refiners.** The tool is SharePoint Search Services with as little customization as possible. Users can refine results on the right side of the page, selecting date, content type, or topic.
3. **Page preview.** Hovering over a search result brings up a page preview, which gives users further information to help them choose the best result.
4. **Results.** Search results highlight the use of the query on the page. While search used to be one of the site areas that received the most complaints, the focus on improving content and metadata and teaching content authors about search engine optimization has greatly improved the relevancy of results.

DESIGN PROCESS AND USABILITY WORK

The Delta team did not do a tremendous amount of research for the redesign. The project was intended to replace an existing intranet that, although aging, seemed to meet most of the stakeholder and user requirements. Also, given the company's existing contracts and technology use across the organization, it was pre-ordained that Microsoft would be the platform of choice. Therefore, the biggest focus for change was the content, and that part of the project took shape in two distinct ways:

- Educating the author community on search engine optimization
- Training authors on best practices for writing for online and mobile consumption

Reaching Out to Users

The team conducted a card sort, but it was primarily aimed at giving the stakeholders data and supporting the team's recommendations. This exercise yielded no real surprises; it mostly served to validate the team's original hypotheses.

The team also conducted approximately 20 forums with various work groups across the country to better understand their pain points and frustrations with the existing platform. Because the Delta workforce varies from desk workers who spend their full workday on the phone to completely mobile employees such as pilots and flight attendants, it was imperative that the team hear from all employees. For some groups, an intense focus on mobile would be key, while for others, mobile was not even a consideration, and findability topped their priority list. The team knew it was important to do both well if the intranet was to succeed.

One of the most surprising aspects of these focus groups was that employees did not differentiate Deltanet, the portal, from the many applications they can launch from it. As a result, most user complaints that the team received were about problems with applications launched from Deltanet.

Approach

The team met with three other large companies to discuss strategies and the challenges those organizations had encountered with their intranets. This helped team members expand their thinking beyond what they knew about their own business and user-base. Although helpful to share ideas, no *Aha!* moments arose from these sessions. It was apparent that they all shared the same frustrations: content, content, and more content. These shared content challenges focused on how to keep content updated, ensure that it is relevant and findable, and present it well. This laundry list seems to be a never-ending effort across organizations, even with technology there to help manage it.

Although the team eschewed a survey approach, the one thing it did poll employees about was whether or not to rename the site. In response, it heard a resounding *No!* So, all team members did was change the *N* in DeltaNet from uppercase to lower to emphasize that the focus was no longer on the technology — that is, the *Net* — but rather on the network of Delta people.

Determining the IA

The project started with an IA emphasis out of the gate, and the team started from scratch to get the IA done. This gave team members more freedom in creating the IA; it also proved to be a very effective way to eliminate outdated and redundant content. Instead of being forced to think about how to build a structure to fit the existing content, it let team members create the structure first.

They quickly learned, however, that the challenge with this approach is that the best intranet structure does not always align with the actual company structure. This is difficult to reconcile; with most content, the author permissions must primarily live within an organization's divisional sections. Regardless, the approach the team chose for the IA was to not limit the menu to the company structure, focusing instead on what makes the most sense to users.

Here's how that breakdown works in action:

- **Universal Menu:** shows on every page on Deltanet
    - **Division Controlled Menu:** shows underneath the universal menu on every divisional site, unique for each major division
        - **Departmental/Page Menu:** optional menu that displays in the left navigation column

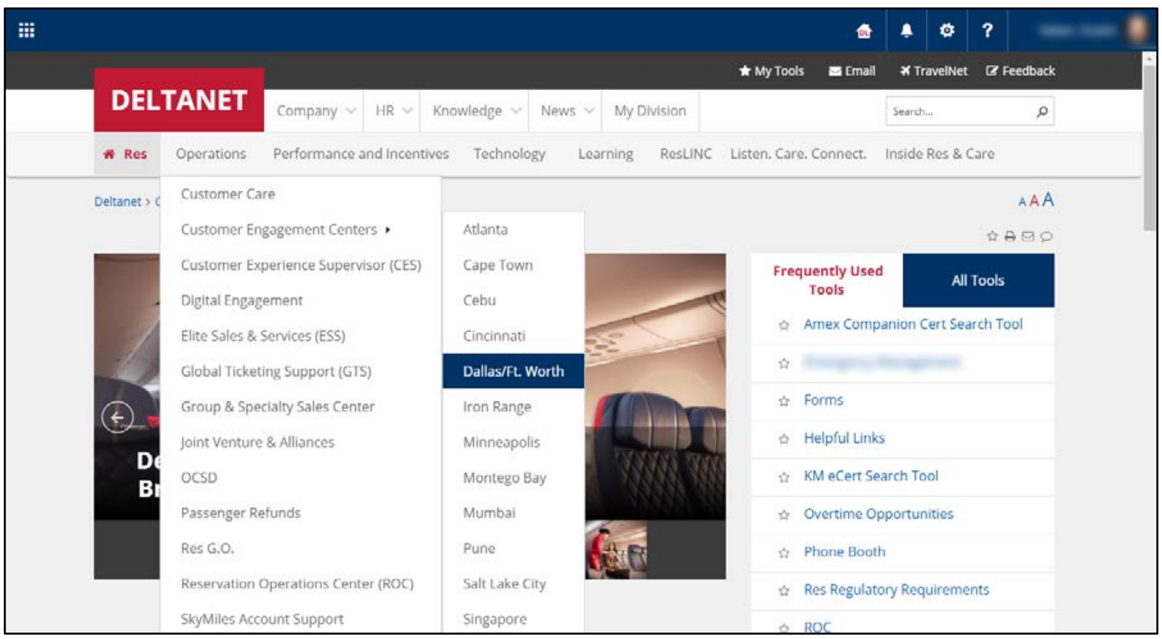


Image 50. Delta Air Lines Divisional Navigation. Each division has its own divisional submenu that appears below the global navigation, with multi-tiered menu options. *50_Delta_09_DivisionNav_Live.png*

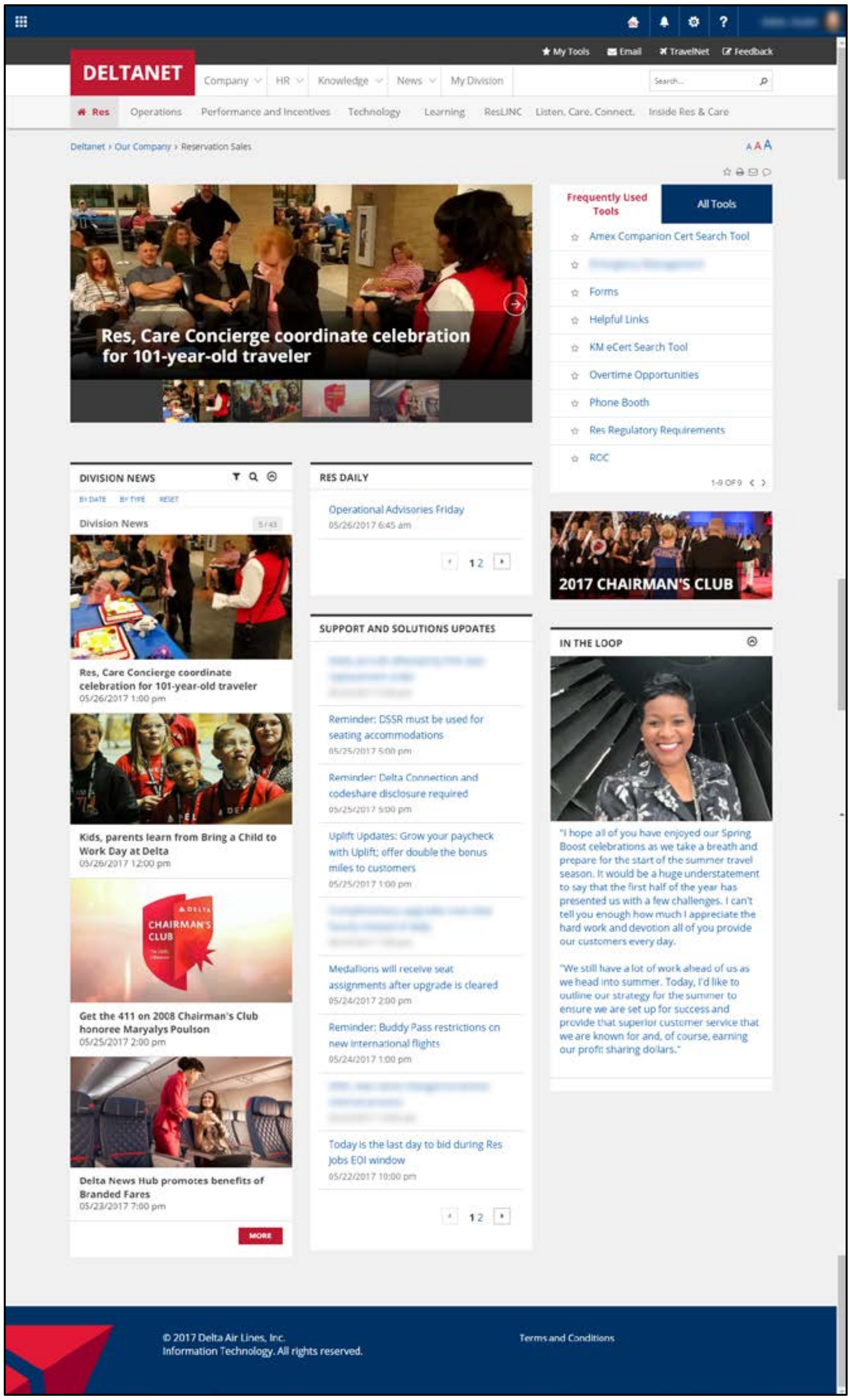


Image 51. Delta Air Lines Divisional Homepage. The divisional homepages are role-based and maintain a consistent look and feel, with common web parts appearing in the same general area across all divisions. Each division has an optional featured news slider that contains news specific to their division. *51_Delta_10_DivisionHome_Live.png*

Adoption and Buy-In

Having an intranet crash is apparently a great way to get buy-in to develop a new one, because that's exactly how Delta team members finally got theirs. After the crash, the company's CEO and CCO mandated that the team move forward to build a new intranet.

Having a CEO mandate should have been enough to propel the project forward, but that wasn't initially the case. Others, who were avid process followers, were hesitant to help unless the project went through the appropriate review, use case development, and funding steps. This caused significant delays and an inordinate amount of frustration to many involved.

Ultimately, after a number of escalations and a great deal of effort, all parties got on the same page and the project was able to move forward.

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Slalom Consulting Agency	Slalom was instrumental in delivering this platform. Its team members led the discovery phase and served as the main project managers and platform developers. They were solely responsible for the IA design; conducted surveys and card sorts with users; and worked closely with both IT and Corporate Communications to define, develop, manage, communicate, train, and ultimately deliver the solution.

GOVERNANCE

Corporate Communications is responsible for Delta's intranet from the enterprise business side, and a dedicated IT team supports the underlying technology. This model works well for Delta. Corporate Communications stays in very close contact with the various internal communications organizations. As a result, rolling the intranet up through Corporate Communications seems to work because it can gather requirements and is in a good position to establish priorities.

INTRANET TEAM RESPONSIBILITIES	
Corporate Communications Role	**Responsibilities**
Corporate Communications Deltanet Team	• Worldwide Deltanet ownership • Responsible for the Deltanet homepage UX • Provides platform requirements, enforces governance, trains divisional page owners and content owners, and directs usability, presentation, and design
IT Deltanet Support Team (see details in table below)	• Worldwide Deltanet development, testing, and implementation • Defines and implements supporting technology that Deltanet needs to operate globally
Divisional Page Owner	• Oversees quality of divisional homepage • Directs content review and relevancy for the updates and consistency of the section • Delegates some or all updates and changes to other members of the team/department
Content Owners	• Updates and ensures consistency of their page, department, or section
IT Team Role	**Responsibilities**
Manager	• Resource management • Vendor management • Leadership reporting
Business Analyst	• Requirements management • Prioritizes enhancements and changes • Quality assurance
Developers	• Design • Coding • Development • Configuration
Testers	• Testing • Quality assurance • Load testing

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	http://deltanet.delta.com
Default Status	• The intranet is set as each user's homepage. • Users cannot update their homepage settings; only IT can change these settings.
Remote Access	• Users can access the site remotely, even when not on the corporate LAN, but some information is not available. The company has many mobile workers, and extranet access is very common. • Flight attendants, pilots, and some reservation call center employees use remote access routinely for business-related purposes. • Up to 50% of intranet traffic is mobile.
Shared Workstations and Kiosks	• Users can access the site via shared workstations or kiosks located at airport gates, ticketing counters, and back offices. • Shared workstations (where multiple users log in to Windows with their own unique credentials throughout the day) are common in airports, reservation centers, training areas, and so on. • “APPSTATIONS” (aka “Idle Mode” or “Walkup” machines) with a generic machine ID login are common in crew lounges and reservation sales locations. When using these machines to access Deltanet, users are prompted to enter their own unique credentials to access individual applications (there is no automated login to apps).

TIMELINE

PROJECT MILESTONES	
Item	**Status**
2004	• Consolidated many departmental webpages, standardized the formatting, and launched the first DeltaNet using Tibco and Documentum
2009	• Basic improvements and updates made to the platform
2011	• First and only true enhancements launched, including formatting options and spellcheck
2012	• Multiple platform outages, with restoration within 4–6 hours –
2013	• Complete “hard-down” DeltaNet outage with restoration exceeding two days
Q3-2013	• Discovery phase: project kick-off, stakeholder interviews, and initial project plan developed for an implementation date of Q3-2014 • SharePoint Online chosen as Delta’s first use of cloud for internal data
Q4-2013	• Review of dependencies illustrated that a Q3-2014 implementation would not be possible based on timing of the dependencies
Q1-2014	• Testing for one of the dependencies did not go well, so alternative solutions were sought
Q2-2014	• No resolution yet identified for issues • Management notified of issues
Q3-2014	• Team member identified that the lag in the delivery of another dependency would cause significant delays if not addressed
Q1-2015	• Defined taxonomy strategy, information management policy, and permission groups. Communication plan completed and training strategy developed
Q2-2015	• User acceptance testing

	• Training material developed and work began on logistics for classrooms and trainers
Q3-2015	• Content consolation sessions for each division • Provided overview of new Deltanet and direction for content reviews
Q2-2015	• Author training began, then stalled due to project delays, and resumed in Q1-2016
Q1-2016	• Migration of content • Search strategy defined and audits conducted during migration to ensure accurate result sets; controlled release with approximately 60 users enterprise-wide
March 2016	• Readiness review and sign-off from business units
April 2016	• Launched the new Deltanet to the entire company

CONTENT AND CONTENT CONTRIBUTORS

Content Governance

"We struggle with governance like Goldilocks and the three bears," says Susan Hayes, General Manager, Delta Corporate Communications: Intranet and Analytics. "We had difficulty (and still do) defining the amount that is 'just right.' And, to make things even more difficult, the need to govern and what you should govern continually changes."

With this in mind, team members started by asking themselves: *What things are so critical that, if they are out of compliance, they will create a significant issue with the user experience?*

They soon discovered that the governance was too restrictive, and they could never govern everything that was included in it. For example, they tried to categorize information to deliver different levels of it based on author credentials; this turned out to be a waste of time. As a result, the team is currently in the process of simplifying governance and trying to focus on only the really big items that have the most impact on the UX.

Delta also gives full attention to a few other content topics. Hayes explains:

- **Wrangling.** “The never-ending responsibility inherent with any good intranet. The fine line between flexibility and usability. My team's constant reminder that their job will never be done. It's amazing how someone who takes down their entire site because they didn’t bother to listen to the training suddenly understands why there is training. Or, when critical information constructed against the governance suddenly becomes unusable because of a system upgrade, it becomes readily apparent why there is governance. Wrangling does not end. Ever.”
- **Quality.** “Content is king. The platform is a delivery method only. Just because content is king doesn't mean that everyone knows that it is critical to a successful intranet. We learned early on that it is very easy to put content on the intranet, but keeping it updated is an entirely different story. Through our required training, feedback capabilities for users to report wrong or out-of-date content and content management, we do a much better job today in keeping content relevant.”
- **Contributors.** “We have over 500 contributors to Deltanet at various levels. Those contributions can either be page ownership, where they are providing content to an entire page, or it can be simply uploading a single report that changes every day.”
- **Contribution.** “Because Deltanet is the official communication platform for Delta, contributions and getting people to post information there is not difficult. The difficulty lies in getting people to keep their content updated.”
- **Management.** “In moving to the new platform, our content records information management policy is defined by the type of content. Based upon the content lifespan, the system will send a message to authors making them aware that the content has to be updated or it will be automatically removed. This has been the most effective method we have found in getting authors to keep content updated.

  “Additionally, we provide content ‘ownership’ reports that provide page owners and authors an overview of their content, its age, and its need for review. And lastly, our system sends an email to authors to make them aware their content is about to expire.”
- **Training.** “Training is a very critical portion of our platform and authors are required to take a Delta cyber security class to understand the various information classifications. This class is generated outside of our organization. Within our organization, our training includes not only steps that authors take to add content to the platform, but also includes an entire class about writing for digital consumption and the concepts of content management and SEO. Authors must take all three courses in order to be approved to post content to Deltanet.”

Content Guideline Sample

CONTENT GUIDELINES
Following is an excerpt from the company's content guidelines, which aim to help authors provide the best quality content for Deltanet: *Deltanet images should be high quality, relevant, and non-copyrighted. Clip art should never be used. When working with images, follow Delta's overall image standards, available in Marketing's Brand Center.* ***Always choose an "Image Rendition" when putting an image on a page.*** *Manually sizing an image by dragging the corners can impact performance and load times.* *We recommend only using the following image renditions on Deltanet:* • *Hero/Banner* • *Small* • *Medium* • *Large* ***Violations of the guidelines may result in immediate removal of images by the Deltanet team to keep Deltanet in compliance with Delta's brand standards.***

Culling Content

The intranet team didn't want to develop a tool to automatically port content from the old platform to the new one because it knew authors very much needed to review and improve the content. This approach yielded great results and helped significantly reduce content on the new site. The amount of content brought over from the old intranet is less than half of what was on the old platform. And, in the end, not only does the new intranet have less content, it is better written and more concise and scannable on the new platform.

The Deltanet team had always struggled to get authors to revisit content and keep it relevant. The migration from the old platform to the new one gave the team an opportunity to educate authors about the importance of writing content that is scannable, and about how tagging and word choice helps users find what they're looking for.

Search engine optimization was a new term to many long-time content providers. The team often received complaints about how poor the old intranet's search engine was, but in reality the search results were bad because the content was not written to optimize how it would be found.

On the new platform, every author must go through two types of training: the first training focuses on the new digital world and how it affects users' attention spans, while the second helps authors understand how writing and word choice can impact the way a search engine presents information. As part of this training initiative the team developed a training called "Writing for Digital," which was an eye-opener for many authors and led to a huge boost in content quality on the new intranet.

Following is an example of how this training helped improve content quality from the old platform to the new one.

BEFORE: ***Classes Now Available - Starting Tomorrow*** *All employees who are interested in either the entry-level or advanced Excel training class will need to sign up for either class through the online training system which is accessible by clicking here. It is necessary for all pre-work to be downloaded which includes a class overview combined with a questionnaire and forms that will all need to be completed prior to attending the first day of the class. Click here for the forms. Click here for the pre-work.*
AFTER: *Introduction to Excel* *When: June 10, 8-11 a.m. ET* • *Sign-Up Form and Questionnaire* • *Download pre-work and complete before class* *Advanced Excel* *When: June 14, 8-11 a.m. ET* • *Sign-Up Form and Questionnaire* • *Download pre-work and complete before class*

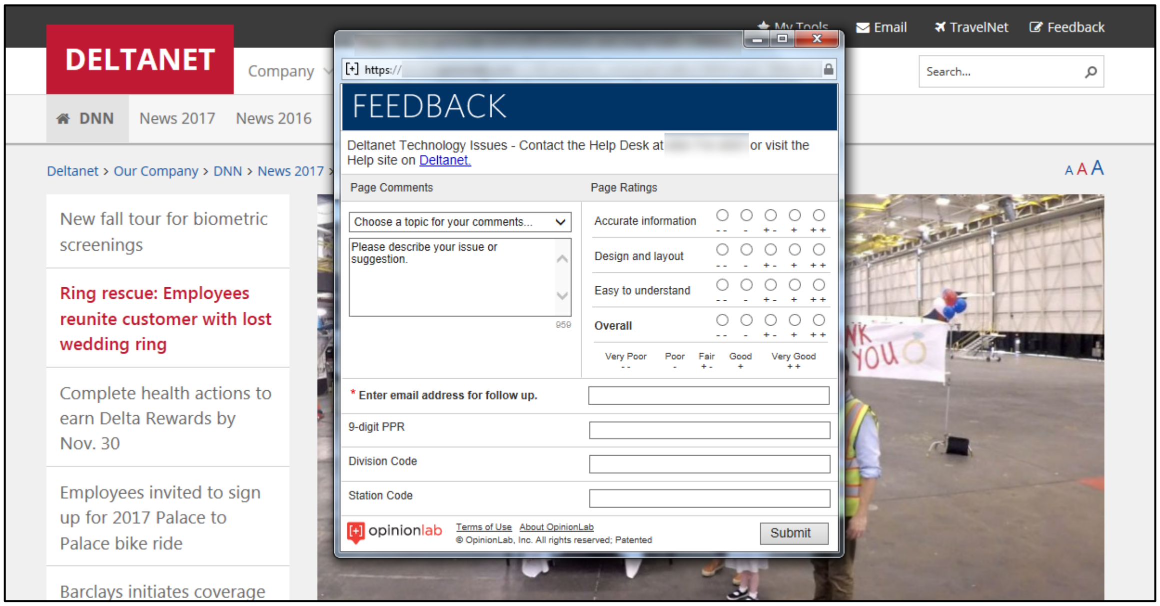


Image 52. Delta Air Lines Intranet Content Feedback. Giving employees a mechanism to comment, ask questions, or provide feedback — and have that feedback immediately sent to the organization that owns the related content — lets Delta quickly respond to questions, comments, and issues.
52_Delta_11_Feedback_Live.png

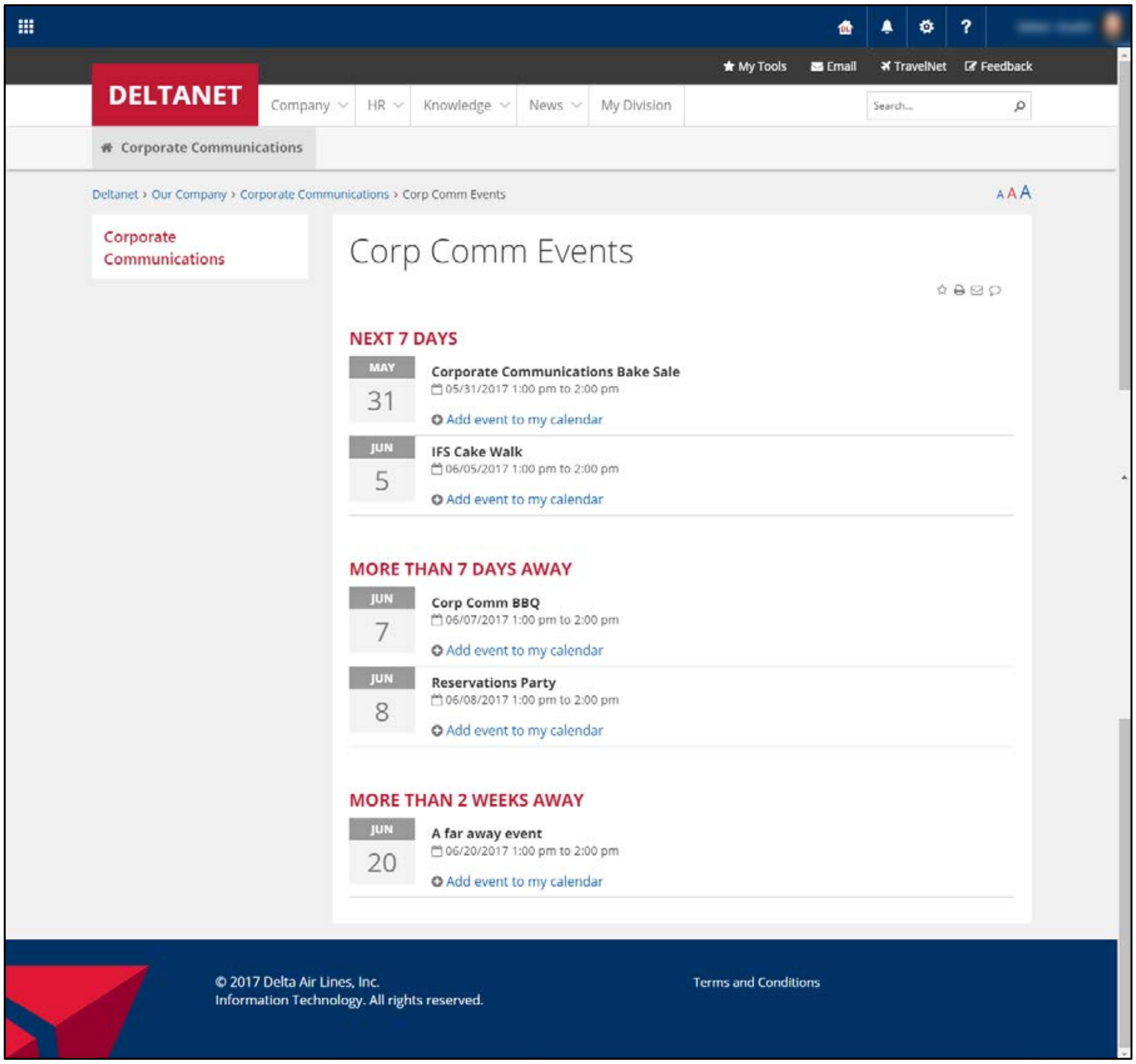


Image 53. Delta Air Lines Intranet Events Listings. Events can be displayed in various ways. In this example, the events are categorized in groups, from most recent to furthest away. Users can easily add events to their Outlook calendars by clicking on the link. *53_Delta_12_Events_Live.png*

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Microsoft Cloud (Virtual Machine for SQL and SharePoint)
Bug Tracking / Quality Assurance	• Custom SharePoint List/Form, HP QC
Design Tools	• Visual Studio, SharePoint Designer 2013, PowerShell
Site Building Tools	• Visual Studio, SharePoint Designer 2013, PowerShell
Content Management Tools	• Sharegate Code Management: Currently migrating from TFS to Delta GitHub
Search	• Out-of-the-box SharePoint Online search
Other Functions	• Azure-hosted SharePoint applications

ROI

Delta measures wins for the new intranet by how well it's serving its audience of users. For example, one of the biggest successes is that it lets users personalize the site and import their own information, such as in the *My Tools* section.

When it comes to metrics, the team monitors page views and user paths, and also uses the Adobe Omniture reporting system. Many of the company's departments are interested in seeing where people go on the site and which content they visit most frequently to help them gauge what their audience wants and whether their messages are getting through. For example, the intranet is used to engage employees and encourage them to take action on certain company-supported initiatives, so it's important to know how well those things are being received. The team uses advertising banners and specific areas and pages to promote these initiatives and then tracks the response to these messages.

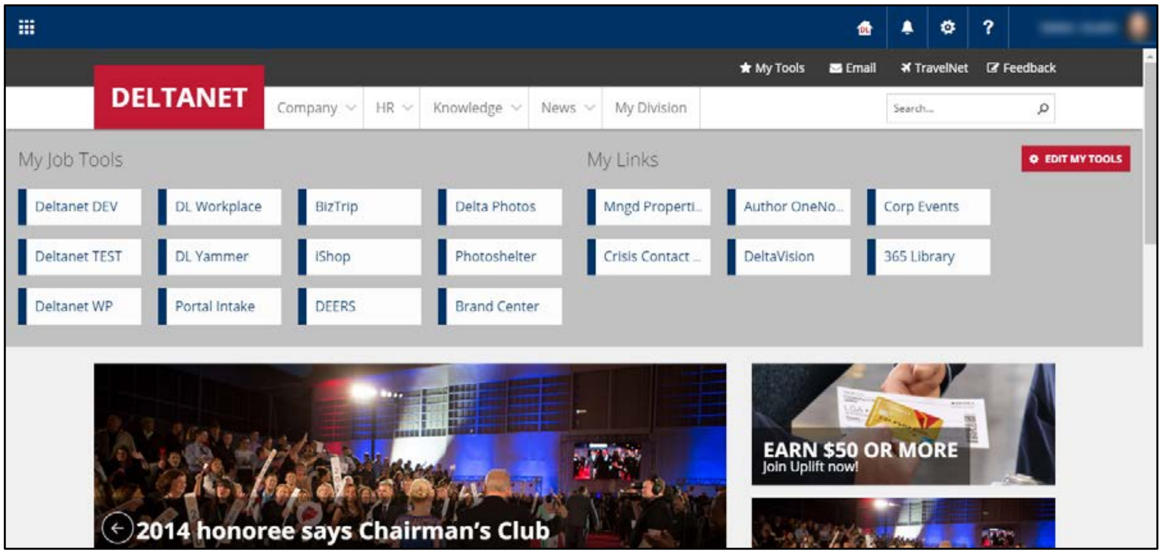


Image 54. Delta Air Lines Intranet My Tools Section. The *My Tools* feature, which is part of the intranet's global navigation, is tailored to individual users based on their company role. Each user can also further customize it. With more than 80,000 employees in many different work functions, providing this individual customization option has been a huge success for the company. *54_Delta_13_MyTools_Live.png*

LESSONS LEARNED

Susan Hayes discusses the various lessons learned through the Deltanet redesign:

- **Executive support is critical.** "We learned how critical it was to have executive support for a project like this. Although we felt as though we had done everything humanly possible to communicate the upcoming changes, when you change a website that people have used for the last 12 years, there is no manner of communication that can totally prepare everyone for what to expect. When we initially launched the new platform, we got a lot of hate mail. I was very pleased to see however, that many people made the effort to later apologize and talk through how much better they liked the new platform once they actually started using it.

  "If we did not have executive buy-in as far as the need to change the interface and to move to new technology, we would probably have been pressured to go back to a model much more similar to what people were accustomed to seeing. I believe we may have been forced to take a step backward had we not had the support of our executives and their understanding of the need to move to a new platform."

- **Cross-department partnerships require patience.** "Our IT support team felt it did not have the expertise to build this platform, and ultimately were a very good partner in the delivery of the platform — but initially, it was a very tough partnership."

- **Know when to call for reinforcements.** “The lesson I learned was that I was not aggressive enough when I knew we did not have the right people at the table within Delta. I allowed the project to flounder too long when some were not on board with the executive mandate to make the project happen. I tried to build bridges and made compromises when I should have been much quicker with escalating the issues preventing progress.”
- **Call for additional resources before the ones you have are worn too thin.** “I was not demanding enough within my own organization regarding the additional resources we needed to complete the project. I worked my team too many hours and was not persistent enough when the help I asked for did not materialize. I was exhausted and so was everyone who worked on my team. We needed help at several junctures and did not get it, but we made it happen despite that, for which I take a great deal of pride. My team made it happen, and I accept the blame for it being so difficult.”
- **Pay attention to password management.** “There was one piece of knowledge that we had overlooked as we launched our new platform: many people saved their login information within their browsers. So, when we launched people were now required to input their password, something that they had relied on their browser to save and therefore had not committed to memory. As a result, our helpdesk received a huge volume of calls from people asking for help in resetting their password. This probably drove a higher volume of calls than any other single issue upon launching the platform.”
- **Pay attention to team morale before it fades.** “An important lesson learned was also the emotional side of a project when you ultimately have to take many delays that are not within your control. The team was tired and the project went on at times it seemed forever. Dealing with one or two delays is one thing, but dealing with four or five and over a year of delays is very difficult in keeping the team happy, excited, and motivated.”
- **Communication is key.** “Another key lesson for us was the importance of communicating throughout the entire process. It seemed that communications would ebb and flow based on the work activity happening at the moment, and it became apparent midway through the project that we needed to meet more regularly and more often.”
- **Plan for support needs up front.** “A huge lesson learned for us was also the amount of time necessary for the support teams to embrace, learn, and be prepared to support others on a project. My team and the IT team are both responsible for supporting the platform. The platform was new to everyone involved and it took a great deal of time and training to get people comfortable with providing support to others.

"We ended up with a team that did not have the comfort level and confidence that they needed to support others. It caused a great deal of stress and concern as we moved toward the launch and supporting authors. The lesson learned here is that training and use of the platform for something brand new like this has to occur way before the launch of the product, and we should have allowed for a much longer timeline in being able to accomplish this."

- **Modulate between necessary and nice-to-have features.** "I think we spent time on things that seemed like a good idea, but were overkill — like the ability to filter news stories by a specific date range."
- **Staff generously.** "For us, from a best practices standpoint we would highly recommend that you do everything in your power to staff the project appropriately. As an example, the details are overwhelming, and you'll want a single person to be on point for coordination of things like training and logistics. This was just one area that constantly needed attention. Once we decided to put it in the hands of a single individual, it became much easier to handle — and they were busy. Very busy.

  "From a staffing level, for a project of this size when you are looking to replace an entire intranet, you need a dedicated team close to the same size as an existing team in order to make it happen. We understaffed it from the beginning and as a result ended up with people who were exhausted and frustrated."
- **Take a thoughtful approach to governance.** "From a governance standpoint, ask yourself the question: *What things are so critical that, if they are out of compliance, they will create a significant issue with the user experience?* We felt as though our governance was too restrictive, and we could never govern everything we included in our governance. We tried to categorize information to deliver different levels of information based on author credentials, and this was a waste of time."

eBay, Inc.

OVERVIEW

COMPANY

eBay is a multinational commerce company operating through its Marketplace, StubHub, and Classifieds platforms, connecting millions of buyers and sellers around the world. It is a 20-year veteran of Silicon Valley and one of the most recognizable brands in the world. eBay's mission is to be the world's favorite destination for discovering great value and unique selection, and it has more than 169 million active buyers. eBay is headquartered in San Jose, California, and its intranet is leveraged by more than 20,000 employees and consultants globally.

Headquarters: San Jose, California

Company locations: eBay has offices in more than 30 countries around the world in all major regions.

Locations where people use the intranet: All employees and contractors have access to the intranet.

Annual revenue: $8.97b (2016)

THE INTRANET

Users: More than 20,000 people use the intranet globally, and it averages 13,000–14,000 unique visitors each month.

Mobile approach: The platform is custom built with responsive web design, and a native app is being piloted that offers users seamless access to content.

Technology platform: MEAN stack, ElasticSearch, Piwik Analytics, Azure Cloud

TEAM

The product design and development team is split between San Jose and Shanghai, with a mix of employees and contractors throughout. As of mid-2017, the teams consist of the following:

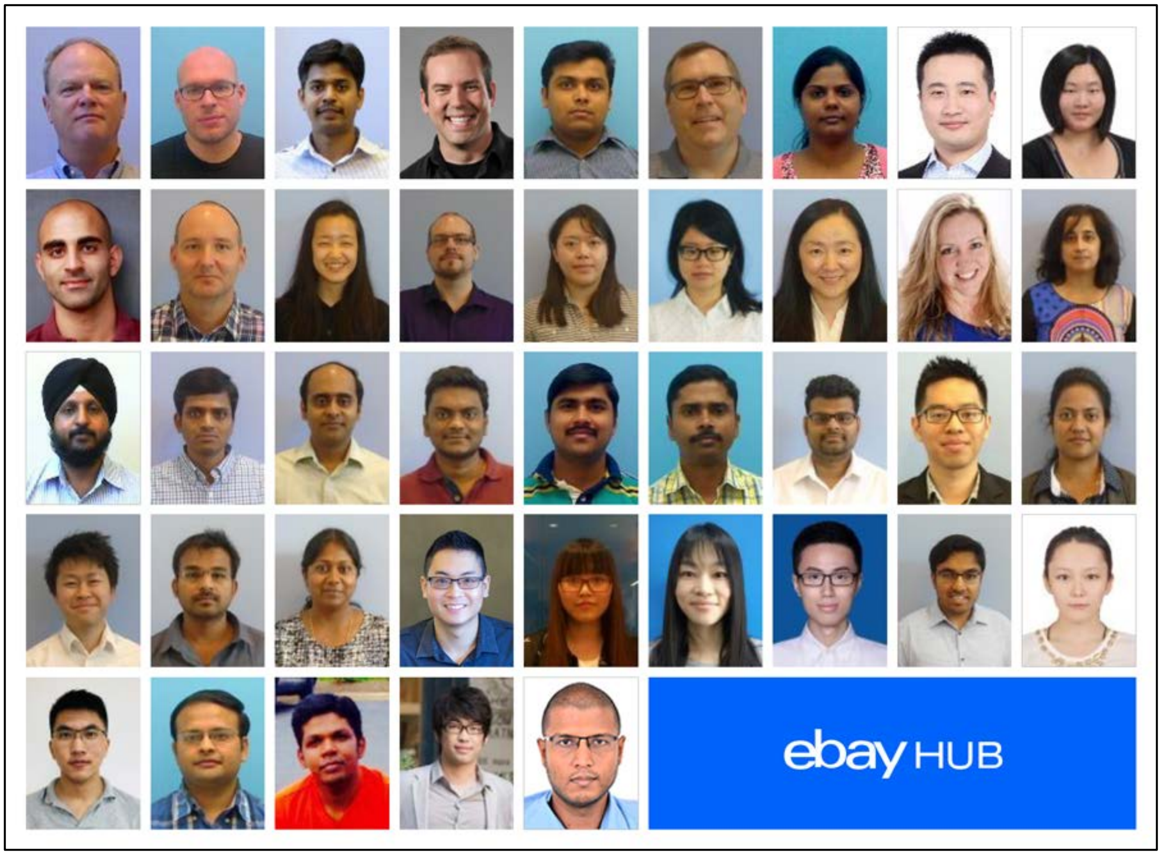
Office of the CIO: John Kelly, Sr. Director Enabling Functions; Adam Garner, Sr. Manager Product Experience; Yoga Ettiyappan, Engineering Lead; Jarod Stanton, Manager, Business Relationship; Darren Zhang, Shanghai Lead

Product and Project Management: Jason Goldsmith, Jennifer Feng, Subha Viswananthan, Kristina Gilman

Design: Chia Chia Tu, Chelsea Chueh, Mandy Lin, Sahand Hajizadeh, James Doran, Derek Marler

Engineering: Thomas Alexander, Kalpana Kanapuram, Lilly Tang, Ram Viswanathanm, Wayne Chaw, Karthick Subramanian, Ashish Sharma, Sreekanth Palaparty, Karunakaran Nagarajan, Raj Dhandapani, Ravi Jayaraman, Kawal Chada, Prajak (PJ) Khruasuwan, Seema Sahu, Ivan Huang, Suresh Paulraj, Srini Lingolu, Erin Wu, Daniel Pan, Elsie Ge, Adam Chen

INTRANET TEAM



Hub team members shown here (top row, left to right): John Kelly, Adam Garner, Yoga Ettiyappan, Jarod Stanton, Thomas Alexander, Jason Goldsmith, Kalpana Kanapuram, Darren Zhang, and Lilly Tang; (row 2, left to right): Sahand Hajizadeh, James Doran, Mandy Lin, Derek Marler, Chia Chia Tu, Chelsea Chueh, Kristina Gilman, and Subha Viswanathan; (row 3, left to right): Kawaljeet Chadha, Karthick Subramanian, Ram Viswanathan, Sreekanth Palaparty, Ravishankar Jayaraman, Raj Dhandapani, Karunakaran Nagarajan, Prajak Khruasuwan, and Seema Sahu; (row 4, left to right): Ivan Huang, Suresh Paulraj, Madhumalar Raman, Wayne Chaw, Elsie Ge, Erin Wu, Adam Chen, Viquar Ahmed Khan, and Daman Daanna; (row 5, left to right): Lei Qian, Raveesh Pateria, Mahendran Sailappan, Daniel Pan, and Vinishton Sundher.

HIGHLIGHTS ABOUT THIS WINNER

After a lengthy relationship with SharePoint, the eBay intranet had aged and was suffocating under unbridled distributed content and more than 30,000 team sites. With a massive redirection of course, the eBay intranet team created the Hub as a new way to support its 20,000 employees. Wielding open source technology and the will to succeed, the team focused primarily on news, search, profiles, notifications, and internal site building. In the end, it made using the intranet easy for content contributors and end users alike.

- **Technology and design flexibility.** While open source technology requires that you build everything from scratch, the flipside is that it gives you the agility to build what is important, and to build it exactly how you want it. For the eBay team, this was both liberating and gratifying. It made sensible choices to defer building some elements, as well as to combine with various third-party offerings — such as for team collaboration features — that suited its needs.
- **Easy page creation for all.** Before embarking on the redesign, team members investigated why the existing intranet was riddled with so many different designs. They concluded that employees who needed to communicate were taking the initiative and creating their own sites, usually using WordPress and one of its generic templates. This resulted in UI inconsistency and no control of the design or content. The team got to work on a solution and came up with *SiteBuilder*, a tool that gives end users the ability to create (and manage) their own site in minutes using a drag-and-drop page builder's predefined components and a WSYWIG editor. Users can choose from elements such as feeds, calendars, images, tables, headers, accordions, and tabs. The created sites are centrally managed and indexed through the search engine, so they are searchable (rather than siloed and lost forever). The pages are also hooked into the analytics platform so the team can track and study them. SiteBuilder has been a great success for eBay; as of mid-2017, the intranet team manages more than 100 sites on the platform.
- **Search.** Search crawls the entire Hub, including news and people pages and third-party tools such as Office, Google Drive, and Jira. In other words, nothing at eBay will get lost as long as the Hub's search is watching.
- **Notifications.** Employees are proactively notified about items needing attention, such as expense reporting and social participation. Push notifications let employees do their work without worrying about checking the status of items they are involved in or opening a third-party tool. Rather, when their attention is needed, they are pushed a notification and they can act on it easily.
- **HR dashboard.** All HR information is consolidated in a concise dashboard that lets employees do everything from look for training, to chat with an HR specialist, to hire employees.
- **Acknowledging others.** Thank you cards are a quick, easy, and fun way to let colleagues know you appreciate their work. With this feature, making someone's day just got a little easier.

- **Showcasing eBay** Whenever possible, the team uses the intranet to showcase what makes eBay a special place to work. For example, the sabbatical pages remind employees of the company's unique time-off benefit, while the Hub connects employees to their eBay accounts, so they can manage various tasks easily through the Hub.

BACKGROUND

As is true in many companies, eBay's core intranet platform had begun to show its age after years of use. The Hub was an on-premise version of SharePoint hosted in the cloud. Employees had built more than 30,000 team sites on The Hub, creating a lot of distributed content that was not tied together to create a meaningful experience. That was the state of affairs when the company's communications team began pursuing alternative solutions in 2013. That initial effort aimed to simply deliver a more compelling news and communications experience to employees; at the same time, it was also becoming apparent that employees were looking for a more modern, cohesive intranet experience overall. So, with all of that in play, the seeds were planted for the technology team to explore and research alternative intranet solutions.

Initially, it evaluated SharePoint Online, SalesForce, and Jive, before landing on the MEAN technology stack — a solution that offered a compelling mix of flexibility and technology independence, while also employing the same core technologies in use by eBay's product teams.

Goals

The team's three main goals for its intranet solution were that it be:

- **Flexible.** The intranet team wanted to carve out its own destiny rather than be dependent on a single technology provider. It also wanted flexibility with the visual design and UI. eBay had recently gone through a major rebranding effort, and it was important that it be reflected in the intranet design.
- **Open.** Ideally, the Hub would not necessarily replace all other technologies, but rather act as the gateway for employees to find all the relevant information they needed in one place.
- **Cross-platform.** It was obvious that access across multiple devices would be crucial to the new intranet's success.

The Challenges of Building a Platform from Scratch

While building a technology platform from scratch is both an ambitious and a noble goal, it entails huge challenges. One of the biggest challenges is one that the eBay team still faces today: how to prioritize what to focus on next.

In the early development stages, the team did a lot of initial research with users, including a review of use data from the existing platform, 1:1 interviews, stakeholder meetings, and white boarding sessions. The team also enlisted outside help, turning to Zurb, the agency that created the Foundation Framework. In the early stages, a researcher from Zurb helped galvanize the initial project focus — sometimes through trail and error, and then in a more deliberate way as the project progressed. In early 2014, a few pilot versions also helped the team build momentum, but then things started to change:

- **2014 — Preparing for a company split.** The intranet's initial focus was on news publishing, profiles, and integrated approvals. Then, in September 2014, it was announced that eBay and PayPal would be split into two separate companies. This spurred a major pivot in the team's focus, as the IT teams had to shift attention from intranet development to the mammoth task of splitting out a company and all of its inherent systems; everything the IT teams had built up to that point had to be replicated to be carried forward by PayPal on its own.

  At this stage, the intranet team was forced to clarify its mandate and focus on creating a new homepage approach that would be ready for both companies to launch upon separation. What had previously been a relatively casual exploration and ideation kicked into high gear, with a renewed sense of purpose.

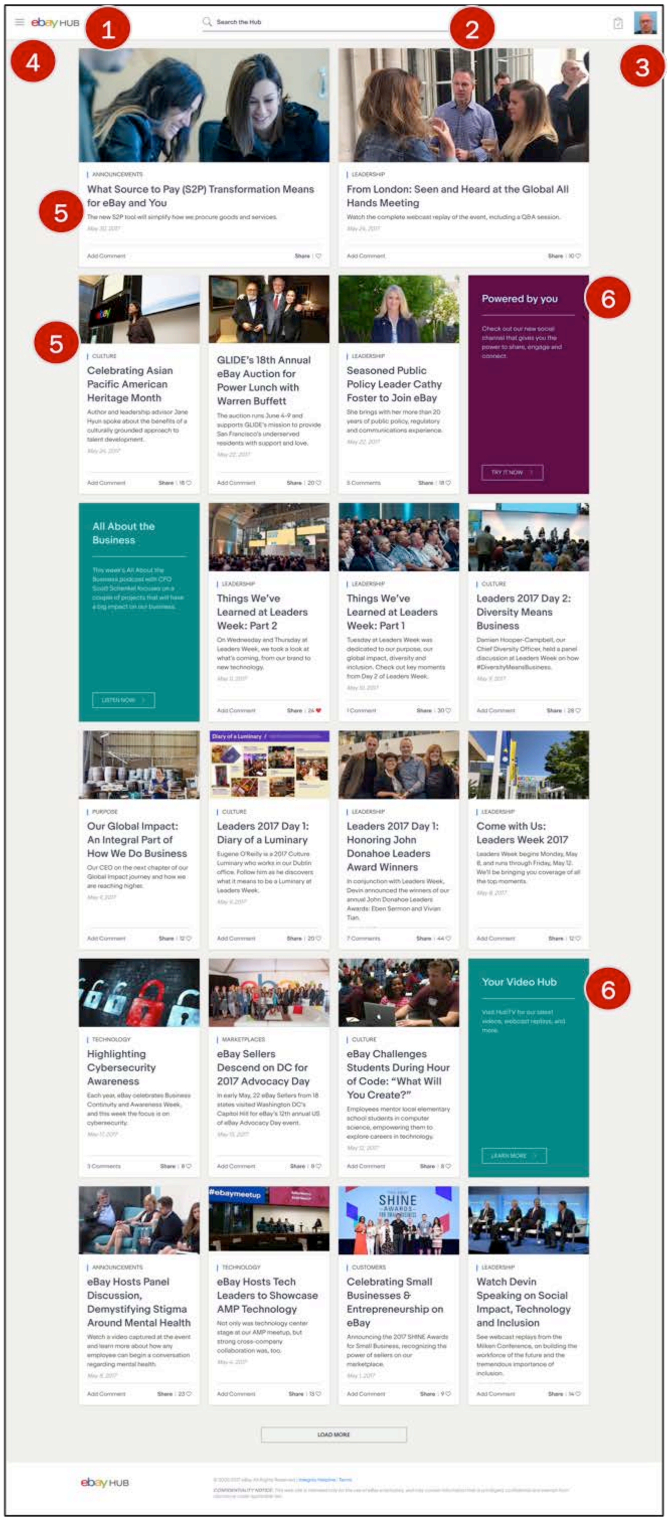
  The organization engaged Octopus Design, based in Santa Cruz, California, to help guide and clarify the designs and set the stage for what would eventually launch.

- **July 2015 — Launching a new Hub.** In July 2015, eBay and PayPal officially became two separate companies and, on the eBay side, the new Hub homepage was launched. This first version offered a newly designed home screen focused primarily on news, an integrated search engine, profiles for all employees, and a megamenu for accessing relevant tools, systems, and sites across the company. This launch was really just the beginning; in the two years since, the company has added much more functionality, including a new SiteBuilder feature.

  The team found that many people across the company were creating one-off sites — typically using WordPress — and then applying a generic off-the-shelf theme. These sites lacked centralized management and control, and offered an inconsistent look-and-feel for end users. Team members piloted SiteBuilder throughout early 2016; the core functionality was aimed at giving end users the ability to create and manage their own sites using a selection of predefined components or content blocks, including images, tables, headers, accordions, and tabs. The team also incorporated feeds so users could publish news stories or hold discussions on their sites, and added access to calendars for event management.

- **2017 — Mobile focus.** As of mid-2017, the team is managing more than 100 sites on the platform — all centrally managed, indexed through the search engine, and hooked into an analytics platform.

One major site, People Central, acts as the gateway to all HR content, has more than 600 pages, and contains content targeted to more than 30 different regions. Previously, the site was hosted on SharePoint, with a small team managing the content. The new site features federated content **control for all of the sites'** content owners, making it much easier to update sites and keep the information fresh and relevant.



Homepage

Image 55. eBay Intranet Homepage. The Hub intranet homepage promotes the vast amount of diverse news at eBay. *55_eBay_01_Home.png*

Homepage Highlights

The team's research showed that employees wanted a more robust news experience and to stay up-to-date daily with company happenings. The answer? The Hub's homepage curates the vast amount of news produced almost daily by the company's Corporate Communications team.

The thrust of the homepage is clearly about keeping employees informed, which makes sense given that the redesign's primary goal was to communicate news. The page is consumed by news items arranged in a scannable grid.

The Hub's homepage design was initially created when the eBay–PayPal split was announced and focused primarily on news. That original mission — to deliver a vigorous news experience on the homepage — has remained over the two years since. The team has also added other important functionality along the way. For example, employees can watch all-hands meetings and other events live via streaming on the homepage.

1. **Logo.** The eBay HUB logo appears in the page's upper left. The *eBay* part of the logo mirrors the company's brand, while adding *HUB* demonstrates that the intranet is a brand in and of itself.
2. **Search.** Although news is the homepage star, and many people sample that information, employees looking for something specific can search the site via the search field available on every page of the Hub. The search crawls multiple sources, providing quick access to people, content, resources, and third-party tools such as Office, Google Drive, and Jira.
3. **Menu.** Employees can also navigate to information via the visually demoted menu, collapsed in a hamburger icon, in the upper left.
4. **Login.** A small photo of the logged-in user appears in the upper right, which confirms to users that they have authenticated on the intranet. Clicking the photo leads to the user's profile page.
5. **News items.** The first two news blocks are twice as big as the other news items on the homepage. This, combined with their position, implies their importance. For these and most other news items, legible images of eBay employees engage readers. Each news item is assigned a topic, which is displayed under the image, and gives slightly more insight into the article's meaning. But, more importantly, the topics link to all articles assigned to that topic. The article title appears in large dark gray san-serif text, which is highly scannable on a white background. A short article summary teases employees. The article's publication date is written in an international format, with the month spelled out and the four-digit year. Users may comment, like, and share each item. The number of times an item has been commented on or shared appears in the lower part of the news block.
6. **Promotions.** Promoted content is sometimes showcased on the homepage to ensure that employees are aware of new services, information, and Hub features. These promotions appear in colored

blocks that are the same shape and size of most of the news items. The different background colors distinguish these items from the other news on the homepage, while also giving the homepage a modern visual look.

Megamenu

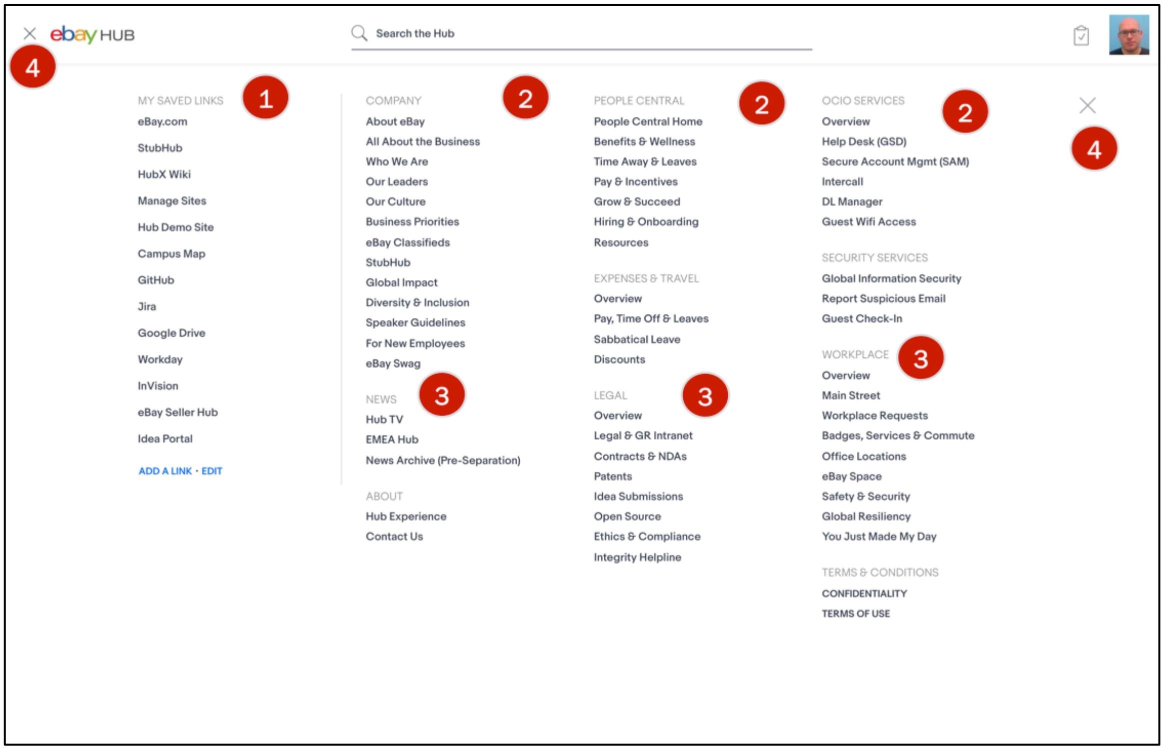


Image 56. eBay Intranet Main Menu. The main menu on the eBay intranet includes links to the most-used areas and tools. *56_eBay_02_MainMenu.png*

Megamenu Highlights

Through the main menu, employees may access the Hub's most popular tools and sections, which are organized by category. Employees can also add their own links to the menu.

1. **User's (custom) links.** The first column of links is generated by the users. This helpful feature lets users create a set of links to ensure that their important apps and pages are always handy. The *My Saved Links* section heading reminds users that these are the links they added. Displaying them first in the menu makes them very easy to access. Users can easily add new links via the blue *ADD A LINK* link at the bottom of the list. They can also move, rename, or remove links from this list using the blue *EDIT* link at the bottom of the list. Offering these editing commands at the list's end makes them easy to find, while making them blue ensures they won't get lost among the rest of the links.
2. **Chunks.** Links are categorized by topics, and sectioned in chunks to make the many offerings manageable. Ample white space between columns gives users a visual breather and makes the menu approachable rather than cluttered and daunting.
3. **Topic headings.** Each list of links features a heading describing the general topic the links relate to; the heading text is in all capital letters, while the link text uses title case. Also, the heading text is slightly larger than the link text and is a different color. These subtle visual differences indicate hierarchy, and make the menu easy to understand and scan. Employees can quickly sample the headings to find the target link's section.
4. **Close.** The megamenu is quite large. Once users open it, if they change their mind and decide not to use a menu link, they need to be able to close the menu easily. To facilitate this, designers added the standard "x" icon in both the upper left and upper right of the menu, to ensure it is easy to see and click.

Notifications

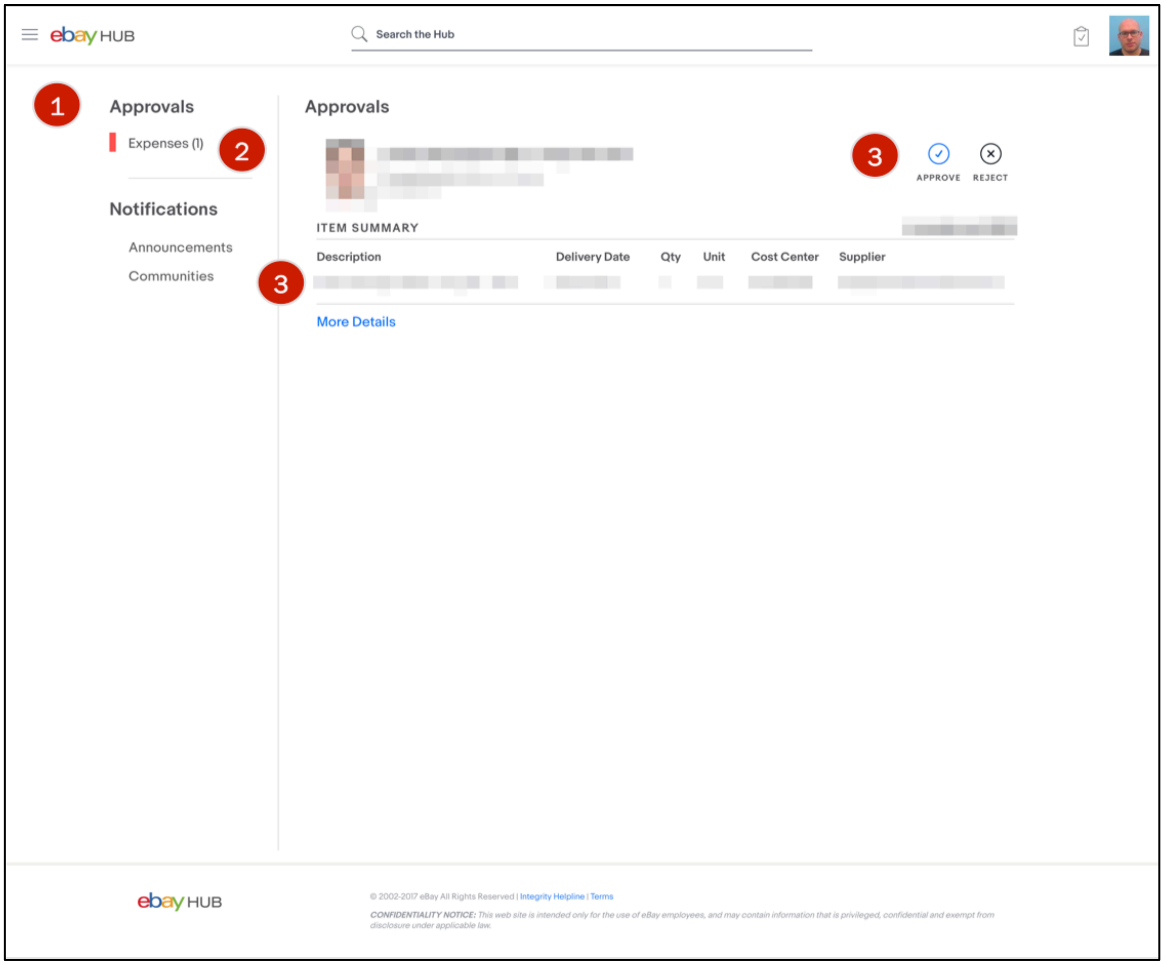


Image 57. eBay Intranet Notifications. This area gives employees confidence that they will be notified when something requires their attention. *57_eBay_03_IntegratedNotificationsAndApprovals.png*

Notifications Highlights

In the *Notifications* area, employees are kept abreast of to-do items related to various areas, such as expense reports, and to new comments on social posts they participated in. Notifications help free employees to focus on work, knowing that they will be alerted these items require their attention.

1. **Navigation.** The left column of the page shows notification categories, including *Expenses*, *Announcements*, and *Communities*.
2. **Number.** The number of new items for the employee to attend to appears to the right of the topic name.
3. **Approvals.** Everything users need to approve appears on the approvals page, so they can quickly act and do their part to keep the eBay machine humming. They can scan a description of the item, delivery date, quantity, and more. Here, they can also click the link for *More Details,* and *approve* or *reject* the item via the buttons in the upper right.

Employee Profile

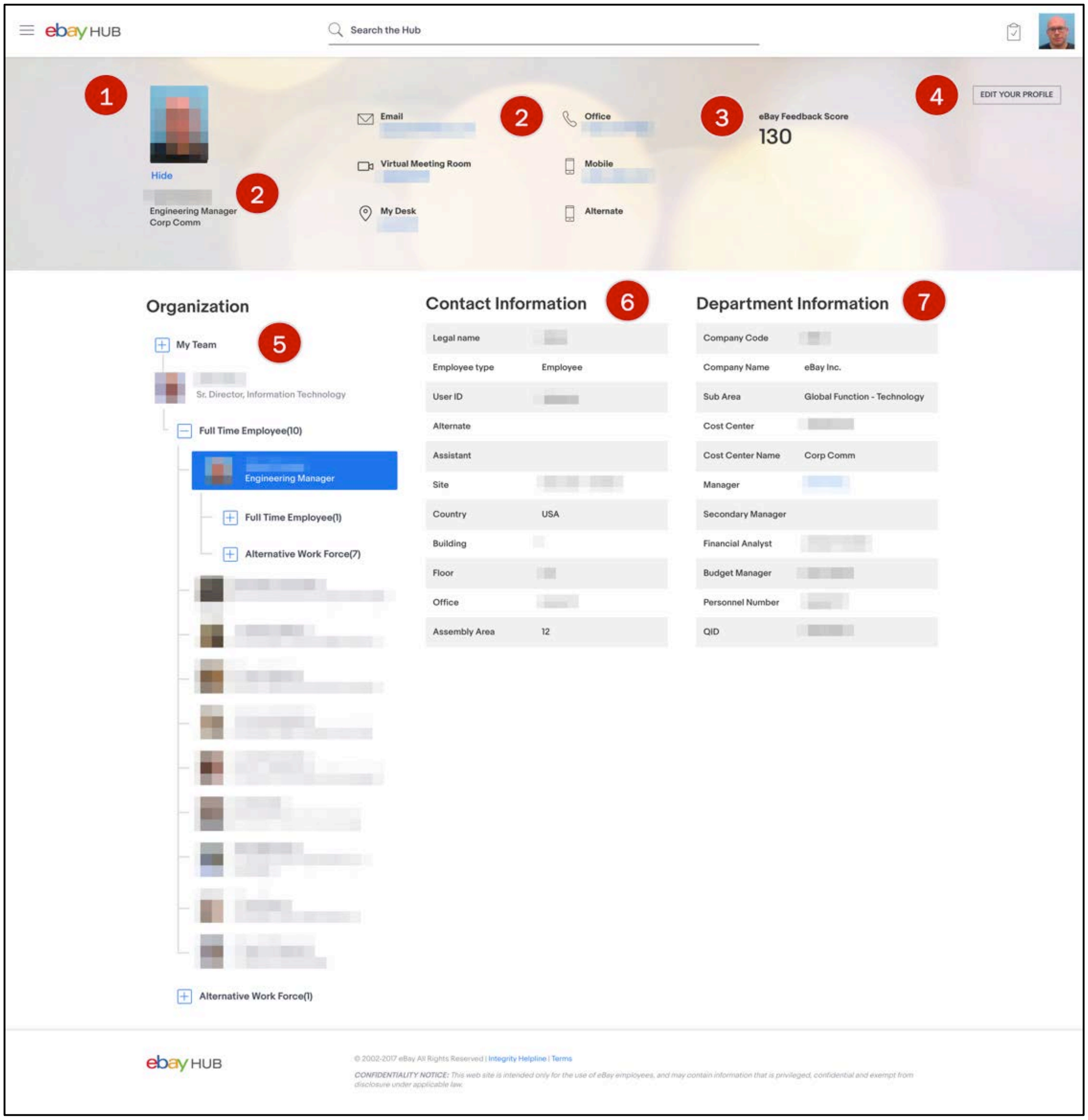


Image 58. eBay Intranet Employee Profile. Employee profile pages on the eBay intranet provide all needed contact information, plus other interesting morsels and an organization chart. *58_eBay_04_Profile.png*

Employee Profile Highlights

The user profile page gives readers an overview of what each eBay employee does, along with basic background and contact information for them. Even if the user already knows the person, the employee profile page might still offer details of interest. In addition to the usual information, profile pages include badges, which users are assigned based on criteria such as awards and patent holders.

1. **Photo.** Don't underestimate the importance of the employee photo. Even a small thumbnail can help employees recognize one another; users can also hide their photo for privacy reasons.
2. **Name and basic contact.** The user's name, job title, email address, phone numbers, and other contact methods appear at the top of the page, where they are easy to see without scrolling.
3. **eBay Feedback Score.** A special tidbit of information at eBay is the person's feedback score from the eBay website, which indicates certain criteria such as awards and patent holders. This score is a subtle way to integrate something important to the company in the user profile.
4. **Edit.** An employee profile page includes the capabilities to edit via the *Edit Your Profile* button in the upper right of the page in the header.
5. **Interactive org chart.** For new employees, an org chart is simply invaluable. Likewise, once a company exceeds 100 employees, seeing a schematic of where each individual and group fits in is helpful. The org chart in the user profile document displays the user (selected in blue) and the people he or she reports to, peers, and people who report to the profiled user. Clicking the plus and minus icons expand and collapse sections to reveal more coworkers and their positions in the organization.
6. **More contact information.** In addition to the basic contact information, other stats about employees appear in the *Contact Information* column, such as their location and whether they are part- or full-time.
7. **Department.** If the group name and org chart information are not enough, the *Department Information* column offers more details about the employee's group.

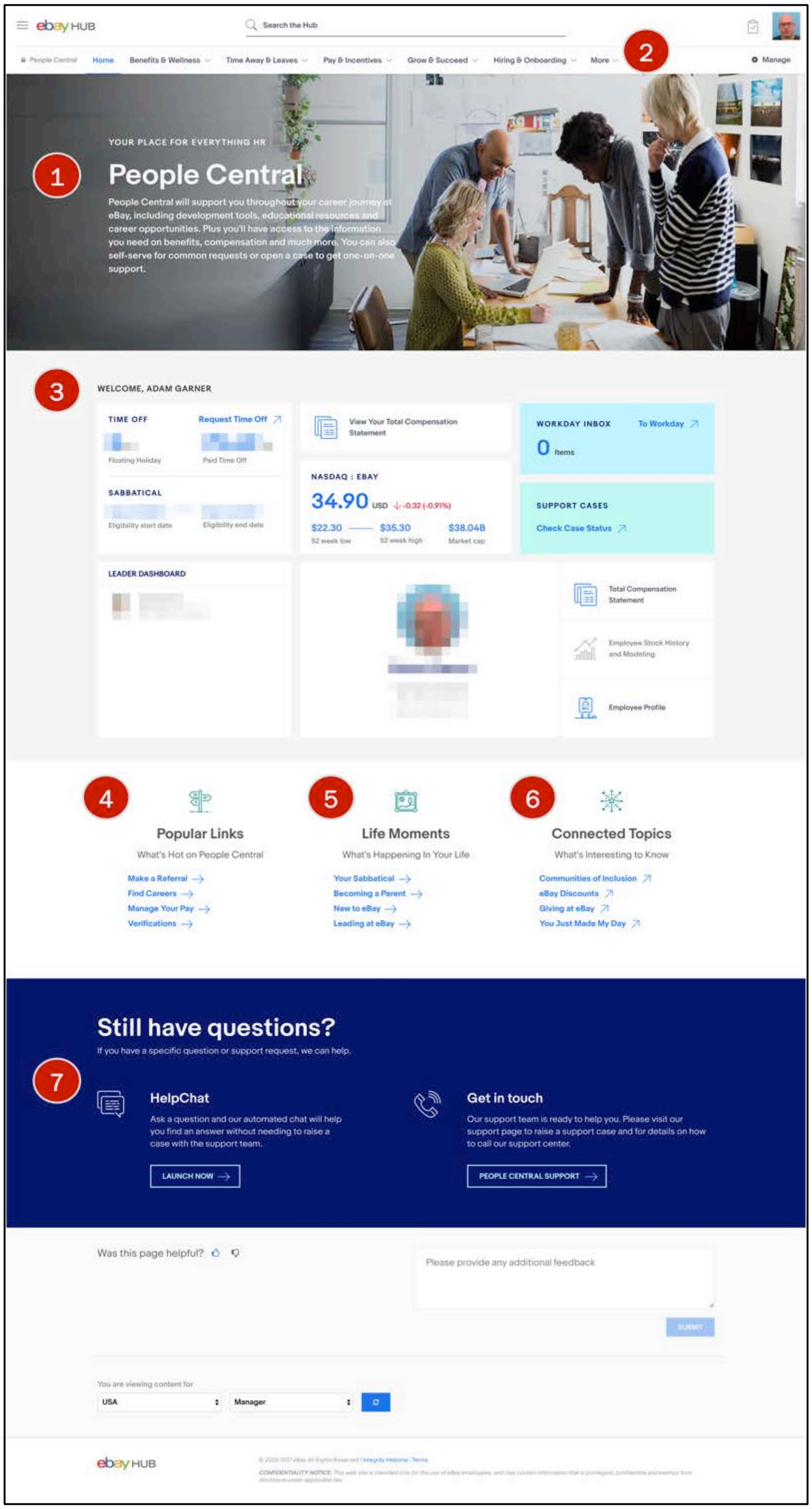
Thank You Cards

Image 59. eBay Intranet Thank You Cards. Employees can acknowledge one another via the thank you card feature, spreading kindness and good thoughts throughout the workplace.
59_eBay_05_ThankYouCards.png

Thank You Cards Highlights

The *You Just Made My Day* feature makes it easy for employees to recognize one another and say thanks for a job well done. This encourages employees to appreciate each other, which makes for a more pleasant workplace. It also shows that eBay, as a company, inspires this. Being recognized by a manger or with a monetary bonus is of course welcomed by most people, but being acknowledged by a coworker — who is not required to motivate or reward you — can be very special. Clearly, eBay employees think so too, as thousands of cards are sent each month.

1. **Description.** The short description for the *You Just Made My Day* feature briefly explains the feature and how to use it. The comment, “Feel free to send as many cards as you want!” tells people that this is a feature to use generously.
2. **Steps.** Each step in the process is clearly numbered — one, two, and three — and has a simple instruction.
3. **Cards.** Each card suggests something to recognize an employee for, from brand support to a simple “Thank you.” The simple, large text on bright backgrounds says all that needs to be said on these minimalist cards.
4. **Add a note.** Users can also add a personal message to the card, as with a print greeting card, further supporting the metaphor.
5. **Recipients.** Users can choose the person to send the card to or, if a team was involved, they can send the card to multiple people.
6. **Send.** The *Send* button has a gray background and a blue border, ensuring its visibility at the end of the white page.



HR Dashboard

Image 60. eBay Intranet HR Dashboard. The HR dashboard consolidates extensive HR information, personalized to the logged in user. *60_eBay_06_Site_PeopleCentral.png*

HR Dashboard Highlights

The eBay Hub offers expansive HR information, from onboarding to benefits, to personal development. Supporting more than 30 regions, *People Central* is one of the most used areas of the Hub and accounts for approximately 40% of traffic.

1. **Description.** Any questions about what *People Central* is are answered in a short description at the top of the main page, which explains in a comforting way that the area "…will support you throughout your career journey…" and goes on to mention development tools, education, and career opportunities. This message helps people realize that this intranet section is not just bare-bones benefits and pay, but offers greater resources to take advantage of.
2. **Menu.** The main HR topics — including *Benefits*, *Time Away*, *Pay*, *Grow*, and *Hiring* — appear as simple horizontal links across the top of the *People Central* pages.
3. **Main content.** The page contains sections of content separated by subtle white rectangles on a light gray background. Sections include pertinent HR-related information for areas such as support cases, stock, and compensation. Understated gamification makes an appearance in the *Time Off* and *Sabbatical* sections, with small graphics that show time-off balance and sabbatical date.
4. ***Popular Links*.** Employees interested in seeing what's trending in HR at eBay need only look to the page's *Popular Links* section.
5. ***Life Moments*.** Some of the bigger life changes, such as becoming a parent or leader, are called out specifically in the *Life Moments* column. This is another way eBay demonstrates care for the individual, and not just a robotic worker.
6. ***Connected Topics*.** Information about communities to join, discounts for eBay employees, philanthropy at eBay, and thank you cards for colleagues are listed in the *Connected Topics* column. These types of offerings show that eBay cares about its employees and the communities around them, which can be fulfilling to employees and give them opportunities to get involved.
7. **Support.** In the blue section at the bottom of the page, users can contact an HR specialist via chat or phone. It's helpful to give these options in case the employee has a question not covered on the site.

Hiring

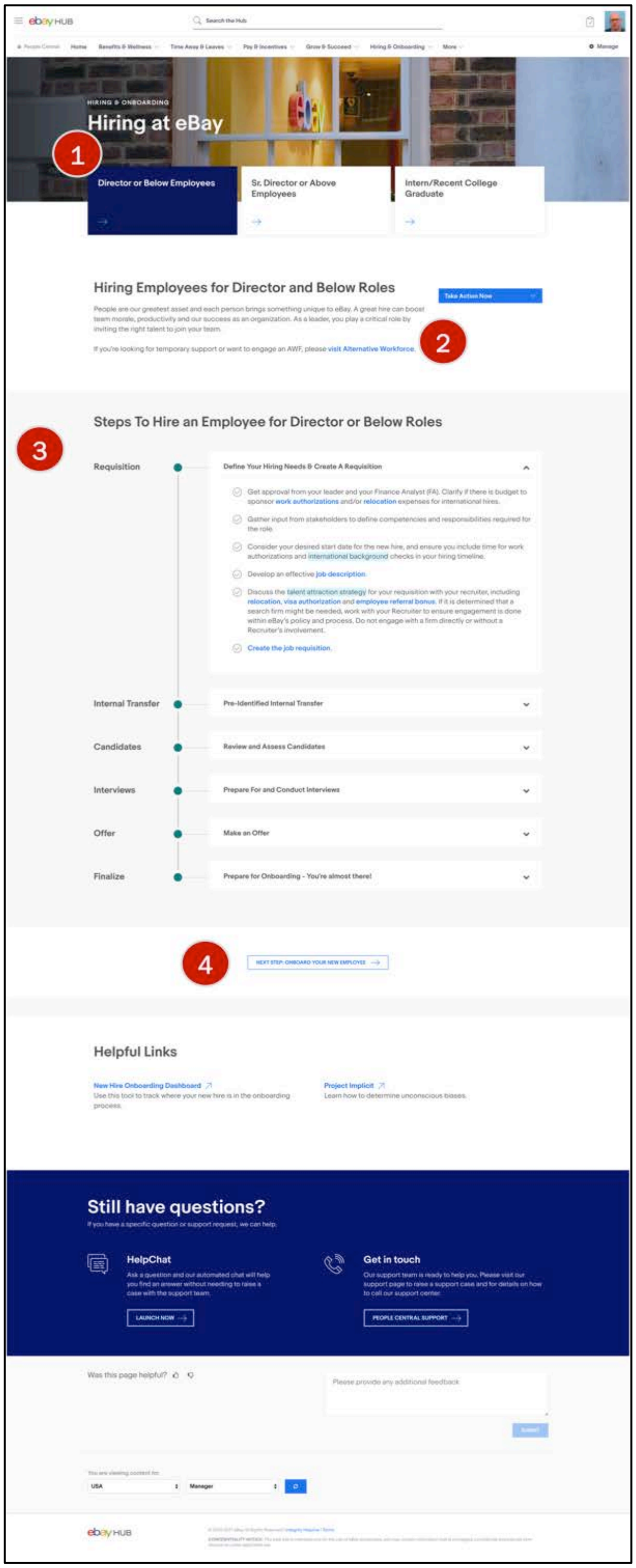


Image 61. eBay Intranet Hiring Page. One of the helpful HR pages on *People Central* assists managers in the hiring process. *61_eBay_07_Sites-PeopleCentral_Hiring.png*

Hiring Highlights

One of the HR pages on *People Central* helps managers easily navigate the hiring process.

1. **Levels.** Because the steps differ for hiring employees at different job levels at eBay, three sets of levels are defined at the top of the page. Users can click these boxes to read about the steps for hiring people at various levels. The selected box appears blue.
2. **Additional hiring options.** If someone isn't looking to hire a new employee but rather to get a contractor or intern, they can also find this information on the page via the *visit Alternative Workforce* link. It's helpful to have this information available here since many hiring managers, especially new ones, may not know the difference between how to hire an employee versus temporary help.
3. **Steps.** A helpful list of steps outlines what to do when hiring employees. These steps offer not just general advice, but also succinct actions and processes. Within each step are links to necessary resources to use.
4. **Onboarding.** Even after the person is hired, the page continues to suggest a path for the hiring manager. The *Next Step: Onboard Your New Employee* button reminds mangers that they should be planning for the new hire before he or she starts work.

Sabbatical

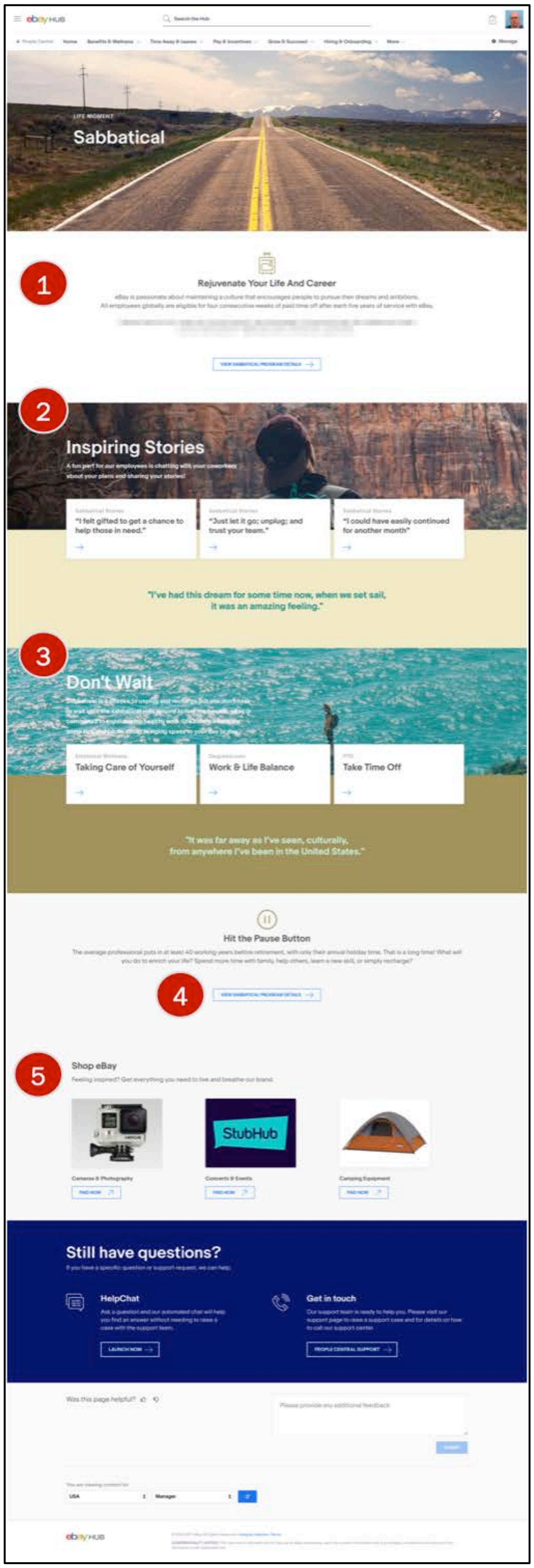


Image 62. eBay Intranet Sabbatical Page. The page about taking a sabbatical at eBay gives employees an exciting adventure to strive for. *62_eBay_08_Sites-PeopleCentral_Sabbatical.png*

Sabbatical Highlights

Not many organizations today offer a sabbatical to employees. It's a special benefit that should be showcased, as it is on the eBay intranet.

1. **Summary.** Near the top of the page is a section that explains that eBay encourages employees to pursue their dreams, and it offers a sabbatical to support it: every five years, each employee is eligible for four consecutive weeks off.
2. **Stories.** For inspiration and excitement, employees can read stories about what their colleagues did on their sabbaticals.
3. **Don't Wait.** This section reminds people they don't have to work 24/7 to earn a sabbatical. The section encourages employees to be healthy, balance their life between work and personal time, and take vacation.
4. **Details.** Employees can find all the information about the sabbatical program by clicking the *View Sabbatical Program Details* button at the bottom of the page.
5. **Shop.** eBay encourages its employees to shop on eBay and StubHub for all of their time-off needs and desires.

Office Location

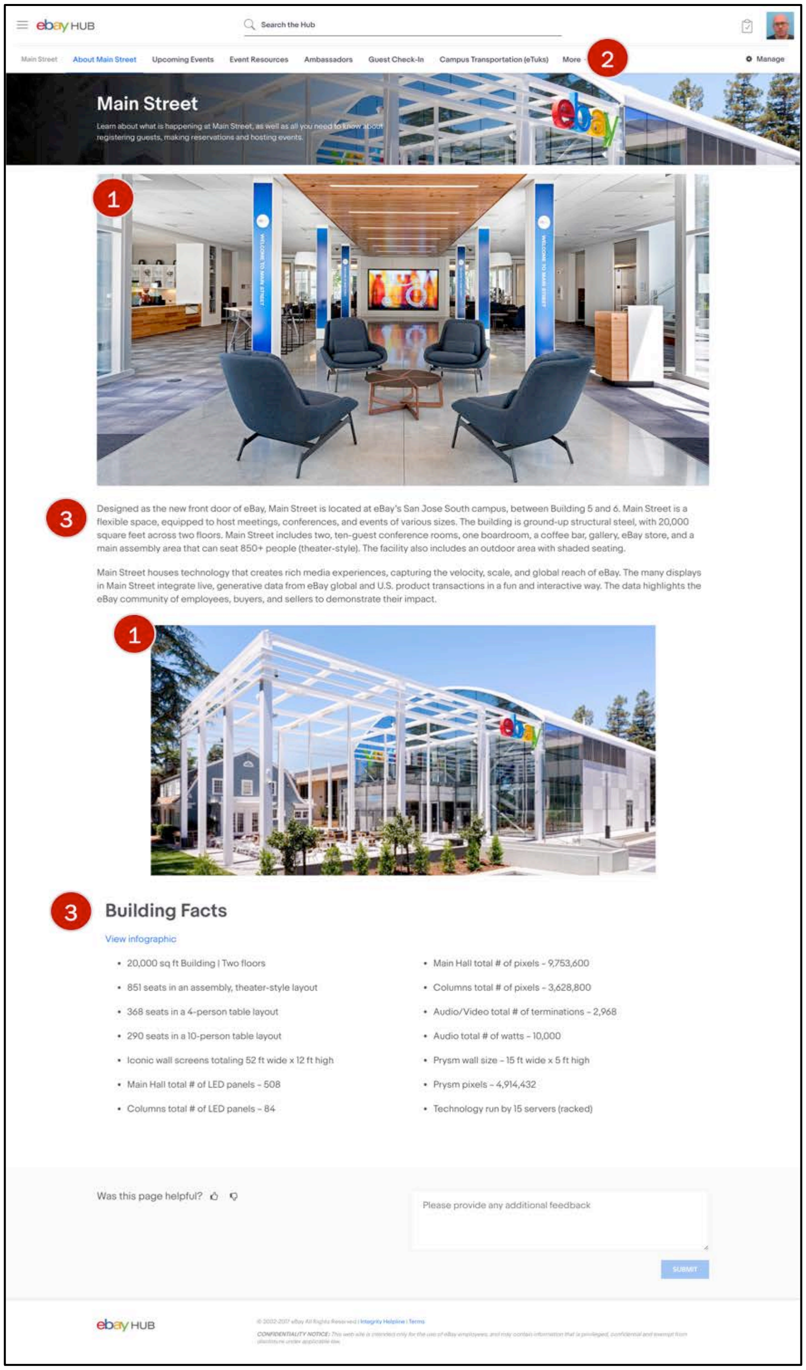


Image 63. eBay Intranet Office Location Page. Employees can get excited about a new building and see its upcoming events. *63_eBay_09_Sites-MainStreet.png*

Office Location Highlights

Office location pages offer information about various eBay offices and let employees book conference rooms. For example, employees can find all they need to know about “Main Street,” a new building recently built on eBay’s San Jose campus.

1. **Images.** Beautiful, large photos showcase the architecture, light, and open design of the new building. These types of images can be thrilling for employees, who are proud of their organization and look forward to working in the new location. And even those who may not work there can learn about — and be enthusiastic about — eBay’s “new front door.”
2. **Menu.** The horizontal navigation includes links to a calendar of events, check-in, and transportation. Whether employees work in, are visiting, or are simply curious about a building, they can learn as much as they need to about it here.
3. **Description and facts.** The building’s goals and the type of work it supports are explained. For those interested in the architectural and interior design, facts range from the size of walls to how many can be seated at tables to how many LED panels it has.

DESIGN PROCESS AND USABILITY WORK

User research has been an on-and-off activity throughout the project's lifecycle; the team uses it selectively, as needed, to leverage key milestones along the way.

As the project kicked off, team members conducted significant up-front user research, including having an on-site user researcher conduct 1:1 interviews. They also held group sessions, sent out surveys, and analyzed the old intranet's available analytics. The cumulative effect of these efforts helped them frame the problems they were trying to solve, as well as focus on key features and functionality.

Along the way, the team also layered in other research activities, including card sorting and user interview sessions. It also met with team members from many different countries in an effort to get the HR rollout right. As a global company, and because the HR landscape differs around the world, the team was especially keen to get a global insight on this part of the intranet.

As the project has moved from launch phase to ongoing improvements, the focus is now on mobile development. Because it's a new platform, discovery and understanding in this arena is critical. The mobile user research so far has been informal and somewhat "guerilla" in nature, with team members often simply grabbing people in the hallways and doing quick demos on the fly. However, as this aspect of the project enters the pilot stage, the research is becoming more formal.

User research, whether formal or informal, has helped the team step out from behind the minutiae and see the big picture. It also uses this research to gain a more generalized understanding of users from a broad cross section of the organization, rather than simply listening to and relying on the loudest voices in the room.

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Zurb	• Initial concept work (2014)
Octopus Design	• Idea refinement, wireframes, visual design treatments (2014-2015)
CapGemini	• Ideation, wireframes, product design (late 2016)

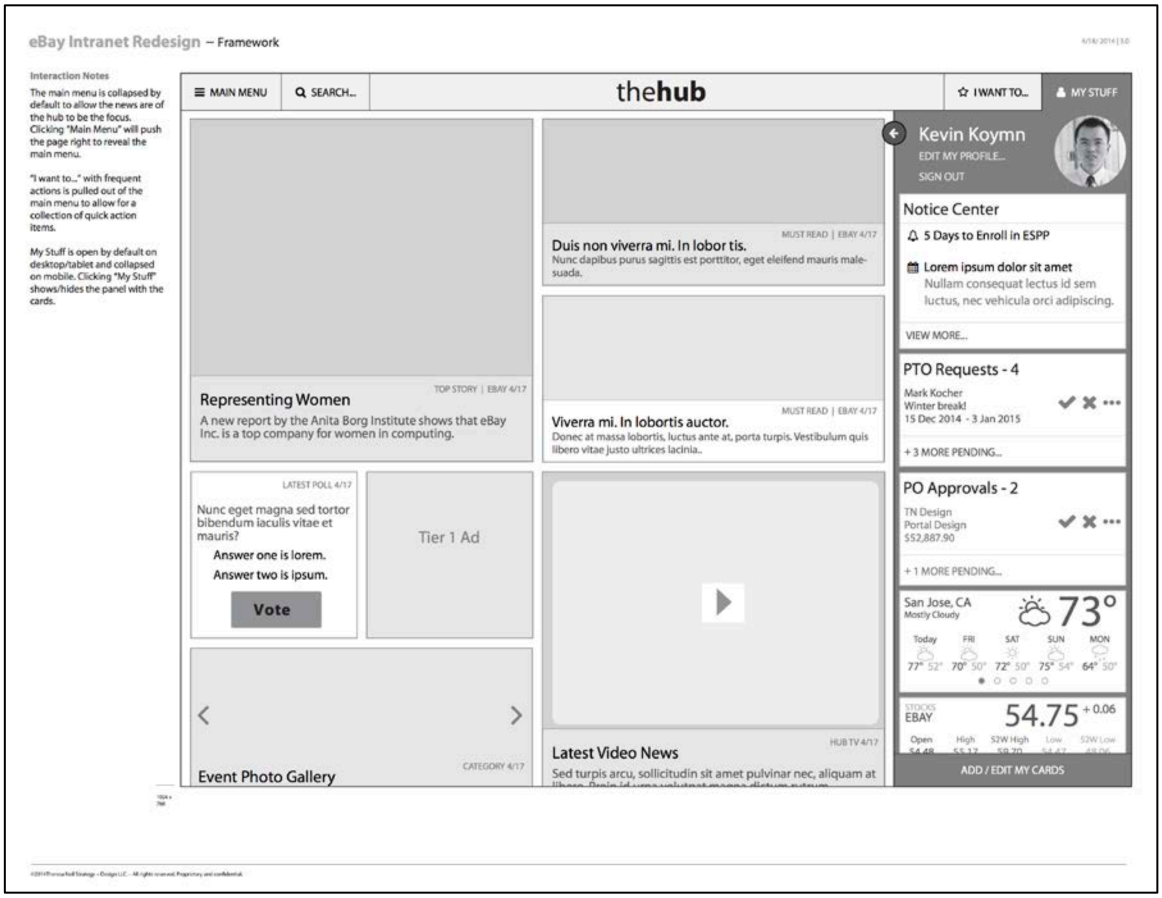


Image 64. eBay Intranet Wireframe — 2014. This shows a page from the earliest design approach. It was used to determine how integrated approvals would be handled. This concept also explored different layout styles and contributed to the eventual feel of the early visual designs. *64_eBay_10_2014-Early-Concept Review-page.png*

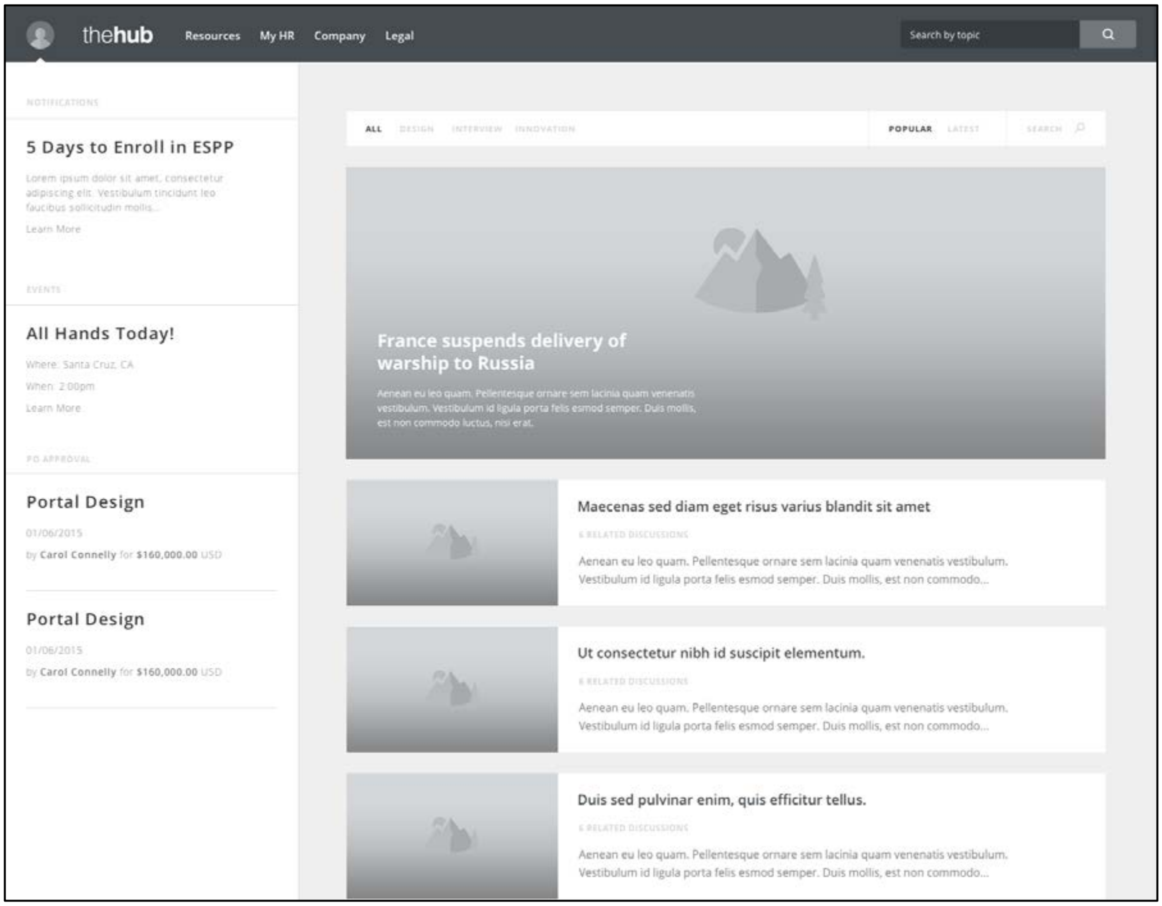


Image 65. eBay Intranet Homepage Wireframe — Early 2015. This shows one of the various design approaches the team considered for the homepage in early 2015. This design illustrates team members' response to a set of requirements that were looser than they would have liked. Having a more refined set of product requirements would have helped them present a more targeted visual exploration overall, and perhaps would have helped them land a homepage approach in fewer iterations. Although the many iterations helped the team shake out the best ideas and build consensus and clarity, these benefits came at the expense of time. *65_eBay_11_2014-Early 2015-WireframesEBY-homepage-initial-1a.png*

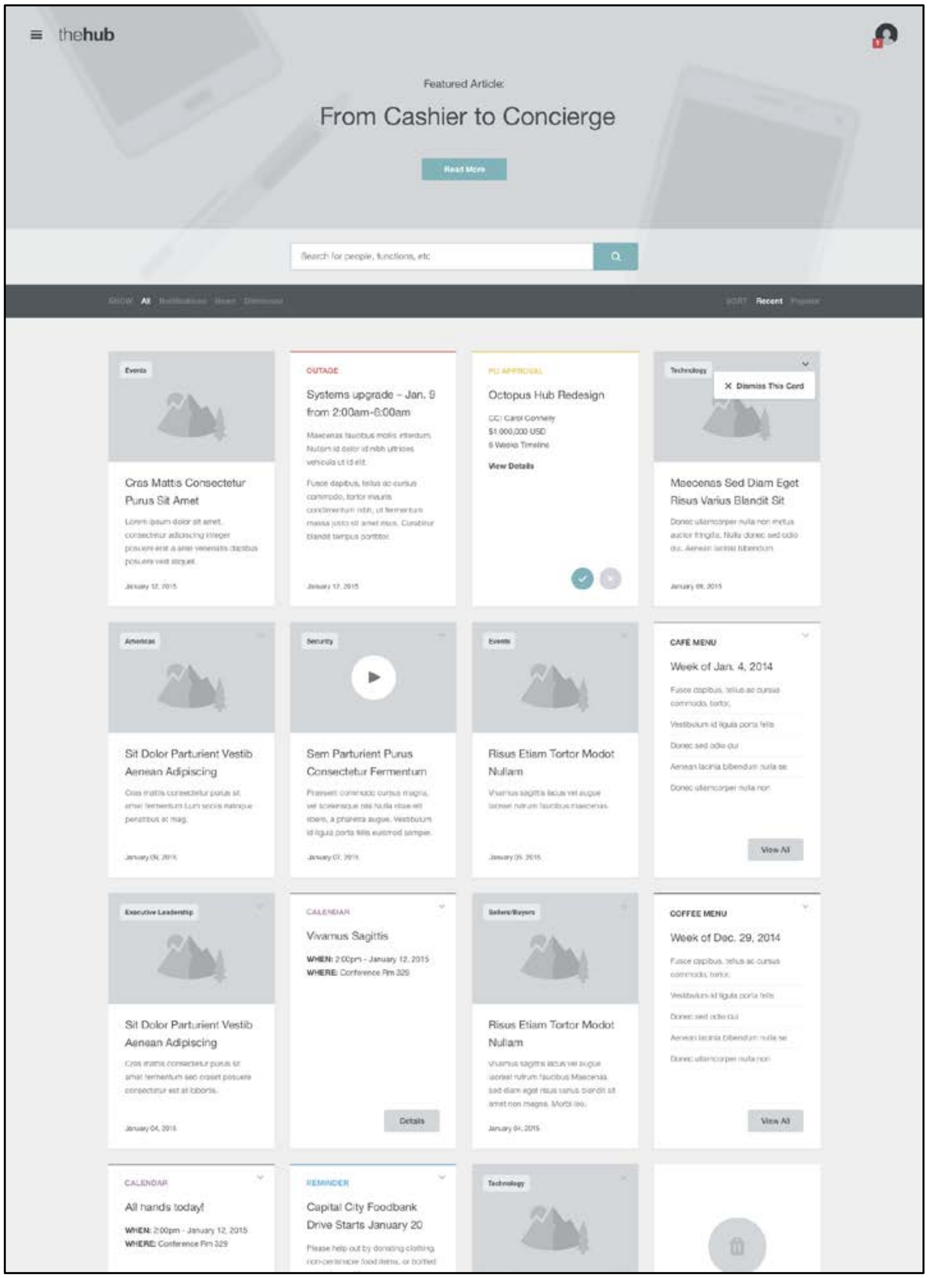


Image 66. eBay Intranet Wireframe — Early 2015. In early 2015, when planning was underway for the company split between eBay and PayPal, the intranet's product direction was reviewed, new stakeholders were engaged, and developers were tasked with updating the platform's pilot version. So much work was going on in parallel that the team had to refine and focus the functionality, which led to a much simpler homepage design approach. *66_eBay_12_2014-Early 2015-Wireframes-01-homepage.png*

GOVERNANCE

The eBay intranet platform (the Hub) is owned by the Office of the CIO (OCIO), while content is owned by Corporate Communications. OCIO owning the platform positively impacts all employees because it lets the organization balance the business needs with support for employee requests.

The platform was built to be an easy-to-learn, self-service website-building tool with drag-and-drop site components. This lets business units and teams across the organization easily build out their own sites with minimal support from the intranet team.

The company also recently decided to allow all of its business units to offer input on the content that appears on the Hub.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Product & Design	• Provide the latest and greatest in industry trends to make sure the intranet is up-to-date with the best technology and visual appeal available • Understand and obtain all business requirements for new project requests on the Hub • Provide non-engineering support to the business for Hub requests
Engineering	• Own the build of all features • Provide platform support for bugs, new feature requests, and platform changes
Business	• Partner with Employee Communications to govern new site requests • Provide program management for all projects related to the Hub • Handle demos and training, and support the business with changes or new requests
Digital Publishing Team	• Publish all internal news content from across the company
Employee Communications Team	• Partner with the Hub Platform/Business team to govern new site requests on the Hub

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	hub.corp.ebay.com
Default Status	• The intranet is not set as each user's homepage, but it appears in browser-managed bookmarks
Remote Access	• Using VPN through desktop or mobile

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2013–2014	• Explored new technology platform and design • Satellite sites built using Drupal CMS
July 2015	• Launched Hub 2.0 • Adopted MEAN stack and Drupal as CMS • New homepage, search, profiles, megamenu
Early-Mid 2016	• Launched SiteBuilder beta • Created internal sites; users self-manage and create pages and content, news feeds etc.
January 2017	• Code refactor and launch of Hub 3.0 • Removed Drupal as CMS and implemented custom solution • Migrated to Azure cloud platform
June 2017	• Launched *People Central* core site with more than 600 pages of content, all managed on platform, including targeted content to different regions and audiences
August 2017	• Mobile native pilot launched

CONTENT AND CONTENT CONTRIBUTORS

Content Governance

The eBay content governance structure is a shared responsibility of the Hub Team within OCIO and the Employee Communication team within Corporate Communications. All new requests come in through either the Employee Communications team or other business units across eBay. In the latter case, the intranet team reviews the requests with the Employee Communications team to ensure they are aimed at creating the best UX possible.

For the Hub intranet homepage, a specific team within Corporate Communications — the Digital Publishing Team — works with all eBay business units to gather content and then publish on the Hub.

Other key content management areas are accomplished as follows:

- **Encouraging contribution.** The intranet team maintains strong partnerships across the company, and business units and teams are given the freedom to create sites that best represent their team. These groups provide the content and the intranet team provides guidance, design review, and support, as needed, to help them succeed. This encourages contribution.
- **Training.** When working with the different business units and teams, the intranet team provides demos. Once these teams are given access to build their self-serve site, they can access training materials, including videos, guides, QRGs, and web pages; they can also do hands-on training as needed.
- **Content management.** Site owners maintain their own content. The platform gives them functionality to set expiration dates and site owners/content creators receive alerts when that content needs to be refreshed, removed, or replaced.
- **Maintaining quality.** Intranet team members keep an ear to the ground so they can anticipate business needs for the intranet. They try to always be listening to what the business wants and what people are saying. They believe paying attention to user feedback is one of the best ways to improve the product and provide the best UX overall.
- **Culling content.** The team's mantra regarding content is: *simplify, simplify, simplify*. A steering committee — comprised of leadership roles across all the main business units — provides input on the intranet. The team also looks at user feedback to identify opportunities for improvement.

  Also, as the company retired the old SharePoint installation, it instigated a process of having content owners either remove content or migrate it to SharePoint online (O365), to the Hub, or to another platform depending on requirements. This helped clean up more than 30,000 sites on the legacy system.

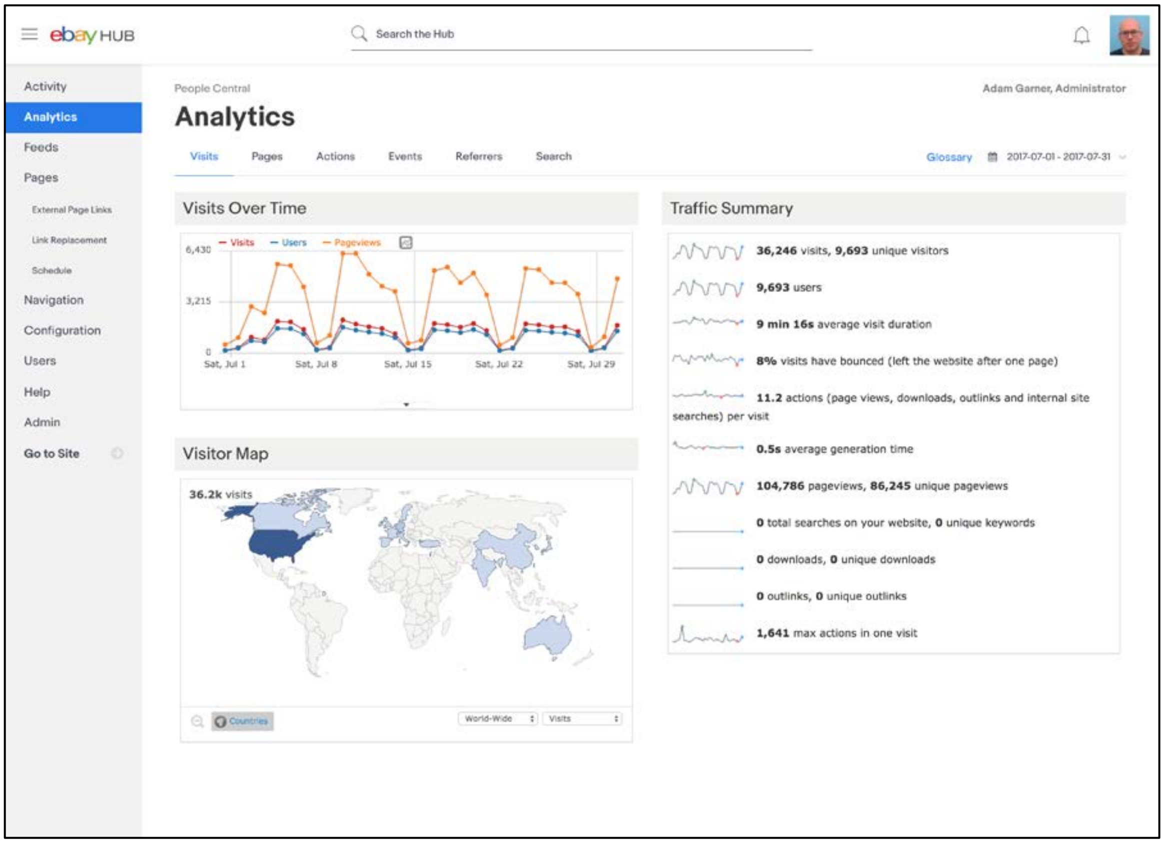


Image 67. eBay Intranet Site Analytics. All site owners have access to an administrator console that lets them manage and maintain their Hub site. This page offers integrated analytics so individual site owners can view site traffic, popular pages, and more. *67_eBay_13_Admin-Analytics.png*

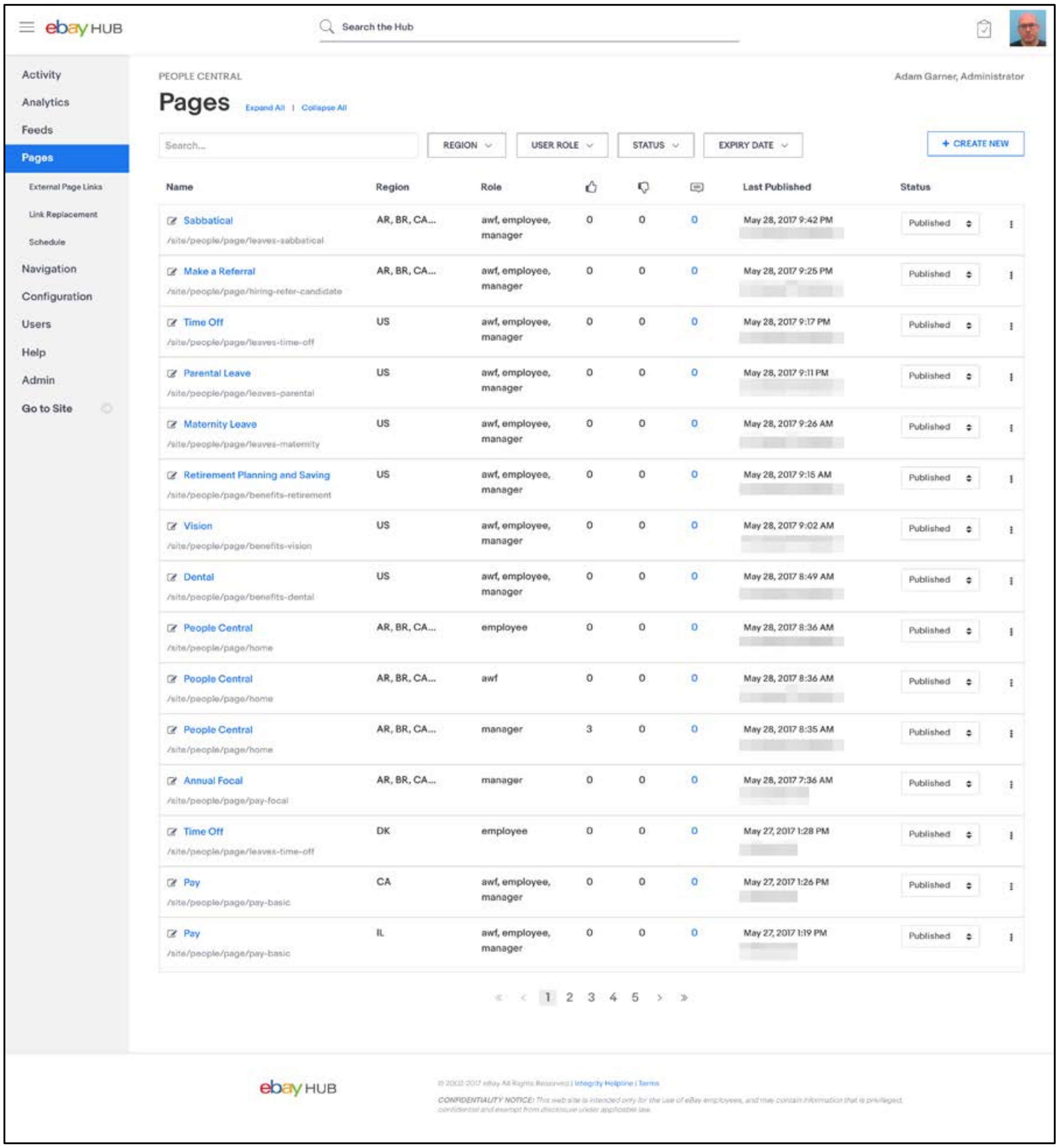


Image 68. eBay Intranet Pages Administration. This shows the list of all pages contained within a site. Site owners can create many pages, and the list lets them search, filter, and sort pages to find the right one. Users can also view, edit, and perform other actions. *68_eBay_14_Admin-Pages.png*

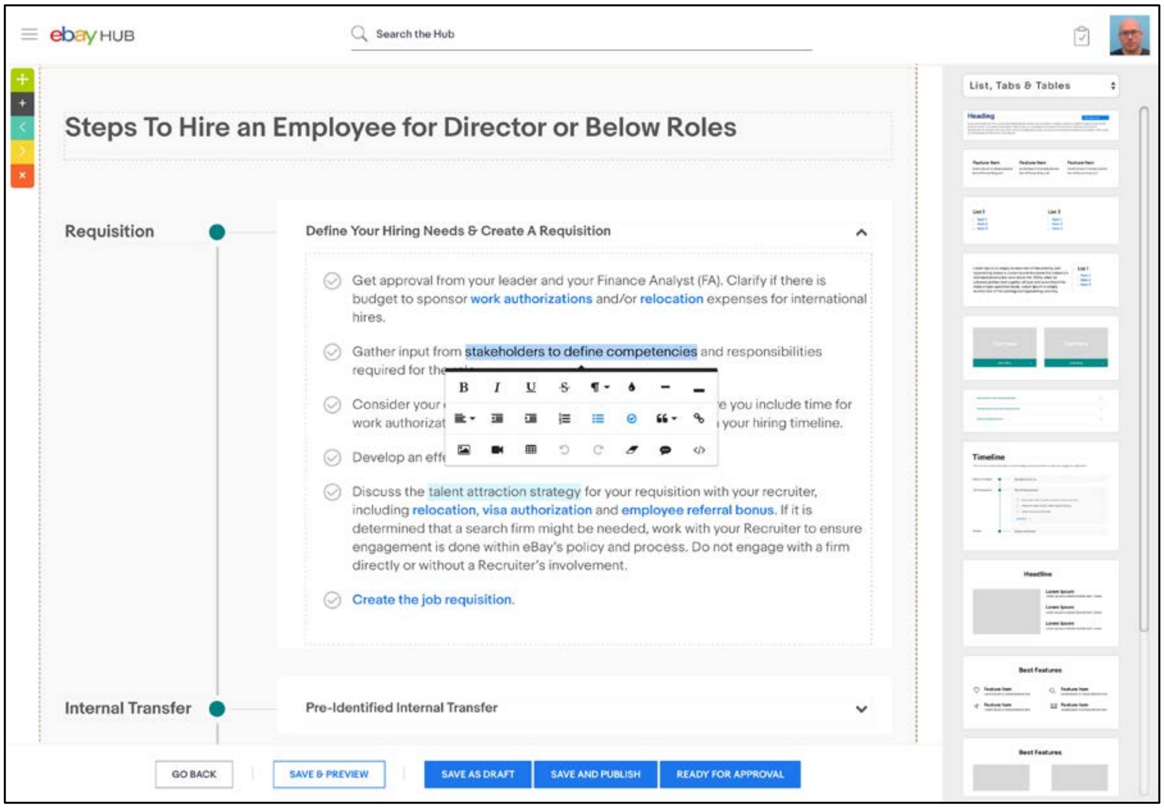


Image 69. eBay Intranet Page Editing. This is the interface that employees use to manage and create site pages. Site owners can drag and drop components from the right-hand selection and edit and update content inline using the editing interface. The formatting palette is a plugin that can be customized to enable unique functionality, but it also contains robust functionality out-of-the-box. *69_eBay_15_Admin-PageEditing.png*

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Nginx, Docker, Ubuntu
Bug Tracking / Quality Assurance	• JIRA
Design Tools	• Sketch/Craft/InVision Enterprise
Site Building Tools	• Custom build using JavaScript frameworks (AngularJS, Bootstrap, JQuery, NodeJS, MongoDB)
Content Management Tools	• Custom build using Nodejs modules
Search	• Elastic Search 5.1
Other Functions	• Running on Azure cloud with high availability enabled; the average site response time around the globe is four seconds

Mobile Approach

The eBay team knew from the start that mobile would be integral to the project; the challenge it encountered was how to enable it effectively. Security is a huge concern for the platform and, after a major breach in 2014, the team wanted to ensure that all access points were secured and controlled effectively.

Throughout 2016, new technologies were being put into place that allowed more effective security controls. In early 2017, the team began to develop a more wholesale mobile solution. Initially, it was going to be a purely browser-based experience, but the team soon realized that it could build a more seamless experience using a native app and incorporating web views for some of the major content pieces.

As of August 2017, the mobile app was in a pilot phase, launched only to a few users. A broader rollout is expected toward the end of 2017.

The app builds on the foundational layer the team has been putting in place since the very beginning. Functionality in the CMS allows content owners to publish content in a mobile-optimized way, which can then be seamlessly accessed from the mobile device. But, by building a native app, the team was also able to identify other experiences it might want to build directly into the app. For example, the team created a companion app for the company’s on-site IT support teams. This app lets users place themselves in the queue to get IT support and help; once they are number three in the queue, the app sends a push notification telling them to head over to the IT team for help: it’s their turn.

The pilot mobile app is built as native iOS, and an Android version will follow. The team targeted iOS first as it's the predominant platform among eBay employees. The goals are to provide frictionless yet secure content access, and enable users to complete actions and be alerted to tasks on the go.

Search

The eBay intranet's core search engine is an implementation of ElasticSearch, which integrates into all of the intranet's integrated systems. It also pulls user information, news, site and content information, and results from third-party systems. The team chose ElasticSearch primarily for its flexibility and ability to both integrate into the intranet and sit alongside the company's other existing systems.

This integration lets the site return a consolidated list of results in a single screen. In addition to this automated search functionality, the team manually curates a list of *Featured* results that can be controlled centrally. This lets the team target specific keywords to specific links, regardless of whether they're in the system or not.

Search can be filtered down to specific categories, including people, pages, news, and individual third-party systems, but it does not support search within specific sites.

There is also a simple relevancy engine in place that will push popular search results up in ranking based on user behavior.

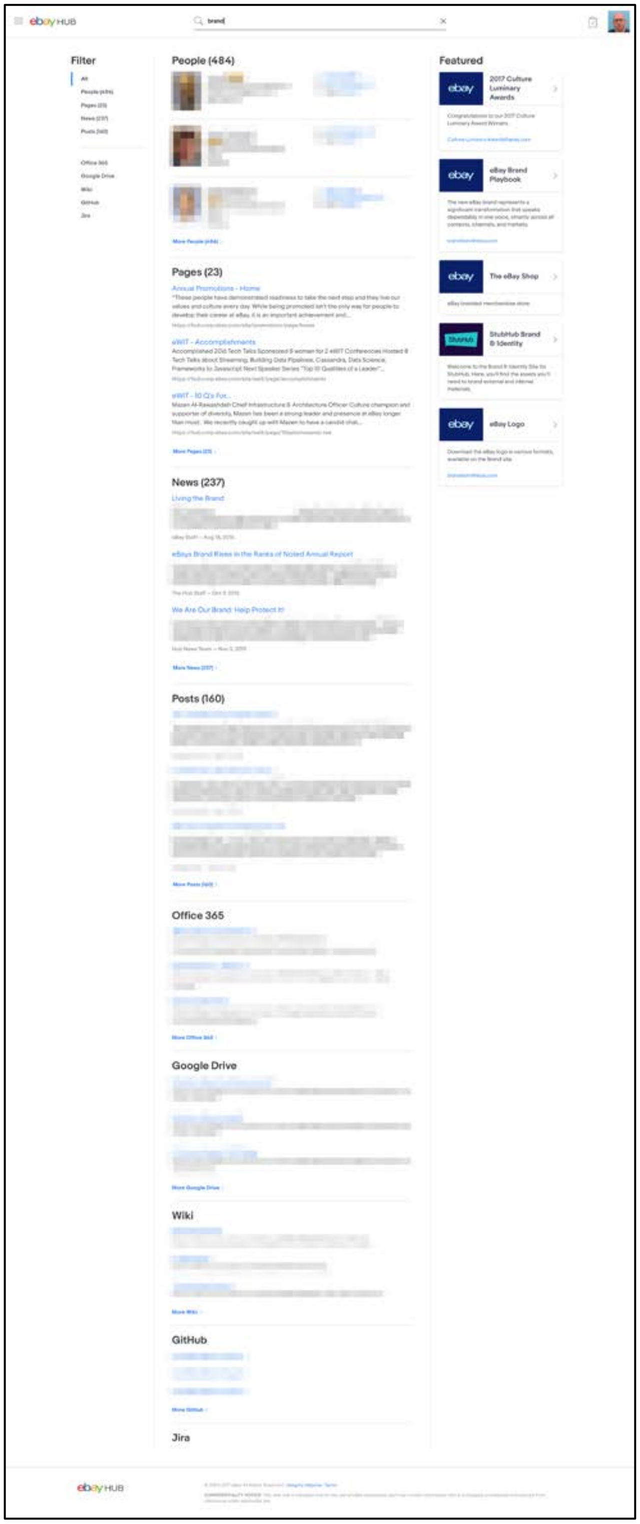


Image 70. eBay Intranet Search Results. The search responds quickly to a user's keyword and searches people, sites, news, and third-party content. *Featured* results are manually curated responses with best guesses as to the appropriate destination. 70_eBay_16_Search.png

ROI

Measuring success or a company's return on an intranet investment is usually multi-faceted and is rarely accomplished with hard numbers. eBay follows this general pattern to a T.

In the initial design stages, team members did track some specific tasks. For example, they knew that certain approval processes took time, so they wanted to expedite them by integrating them directly on the homepage. So, for example, if someone needs to make an approval, they must go to a third-party system, log in, wait to be authenticated, click to find the approval, and so on. The team thus had to measure those types of tasks and rank them against a simple one-click integration on the homepage. As the system has grown in complexity, however, it has become hard to parse these types of nuances, so — as with most things — it's not a linear process, and the team's focus on these types of improvements varies depending on current priorities.

The bottom line is that user satisfaction tends to be considered more impactful than hard numbers, which don't really provide the team with enough value.

"We know we're being successful if people aren't banging on our door," says Adam Gardner, Product and Design Lead. "That's one advantage of working within a technology company: we have a very vocal and demanding user base, so typically we don't even need to reach out for ideas, feedback — we have pathways for people to provide it to us and they're never quiet!"

Other things that get measured and/or considered in the eBay intranet universe include:

- **Uptime and speed.** From a platform perspective, uptime and speed are important. The team has optimized for performance in several ways, and the move to the Azure cloud has sped-up access times for people around the globe. The team holds itself to minimal downtime standards in this regard.
- **Metrics.** Team members track metrics and use the data to inform a feedback loop. For example, they know the average screen resolutions of users on desktops and laptops, so they make sure to tailor designs with that in mind. They can also see which individual sites are generating traffic, so they can better understand which content is providing value.
- **Reduction of time spent on site.** One overarching goal is to minimize the time people spend on the site. The company wants its employees to be engaged but also productive, so stickiness isn't a key factor.
- **Page-by-page feedback.** Using simple thumbs up and thumbs down functionality on each page lets users provide direct feedback on a page-by-page basis; this helps tell the story of how the intranet is doing.

LESSONS LEARNED

eBay team members outline some of the lessons they learned building their robust, custom intranet solution:

- **There are pros and cons to a custom approach.** “Building something custom is a huge undertaking and has some major pros and cons. If we were to start again, I think we’d be more rigorous in analyzing the value of build vs. buy. Also pay attention to the landscape: SharePoint has typically been the dominant intranet platform and, at the time we started on our journey, the product was in the early stages of its major shift to the cloud but wasn’t right for us. We were hungry to create a new experience and at the time, we found building was the right thing to do. If we were starting again in 2018, the solution now might look different, but we’ve committed, we invested, and are happy with where we are. Knowing that the company you’re building for can sustain the approach is important.”
- **Be crisp in your strategy: validate it early and often.** “We were conscious early on to align our team and strategy like a start-up. We started relatively scrappy but validated a lot of early concepts and gained traction quickly. Being really clear about what you’re solving for and not solving for is incredibly important. We try to stay very clued into our users’ behavior and solution around that. For example, I mentioned previously about Slack becoming a more dominant platform in the company — we’ll never match the experience of Slack, so we’ve been looking at ways in which we can tie all the technology together.”
- **Connect with the users.** “Travel to a different office, a different country if you’re fortunate enough, chat to people, understand them, empathize, listen.”
- **Phase it out.** “We’ve been most successful when our teams have been able to focus on the challenge at hand. As we’ve grown and matured, the focus has diverged and it can be a challenge aligning people at the same time. Be clear about putting things in the backlog, know where you’re going but tune out the noise. Focusing everyone on the same problem at the same time will reap benefits.”
- **Have fun.** “One of the nice things about designing for an internal audience is you’re all in it together, there’s a great sense of unity. We’ve been fortunate enough to have great leadership support, and eBay in general has a great culture in the workplace. We try to make sure we reflect that in what we do. We try to keep voice and tone informal, sprinkle in personality here and there — there’s a fine line, but it helps keep everyone in perspective. Also, go outside every once in a while and take a deep breath.”

GSK

OVERVIEW

COMPANY

GSK has three world-leading businesses that research, develop, and manufacture innovative pharmaceutical medicines, vaccines, and consumer healthcare products.

It is committed to widening access to its products, so more people can benefit, no matter where they live in the world or what they can afford to pay.

Headquarters: Brentford, United Kingdom

Locations where the intranet is used: The company has a significant global presence, with commercial operations in more than 150 countries, a network of 87 manufacturing sites, and large R&D centers in the UK, US, Belgium, and China.

Company locations: Employees and contractors/contingent workers at all locations use the intranet.

Annual sales: $37.8B USD in 2016

THE INTRANET

Users: 140,000 employees and contingent workers have access to the intranet.

Mobile approach: Users can access general content from mobile devices via the company's secure browsing environment, AirWatch. Additionally, many core applications (such as WorkDay, Outlook, and help documentation) and key services (such as news) have external mobile versions available. Long term, the team is looking to develop a mobile-first approach for the intranet, where it will design, test, and build the mobile version, then scale it up to the desktop version.

Technology Platform: SharePoint 2013

TEAM

Leadership: Alex Saunders, Head, Global Digital Communications; Richard Gera, Director, Digital Channels; Aileen Norris, IT Business Partner; Darren Moore, Director, Hosted Collaboration Services; Mark Barfield, VP, Global Collaboration Services

Internal Digital Communications: Karen Weingarten, Manager, Internal Digital Channels; Joe Lees, Manager, Internal Digital Channels

Information Technology: Rich Wojnar, Manager, Web & Design; John Cavanagh, IT Business Process Partner; Mark Hogan, Manager, Service Development; Greg Williams, Senior SharePoint Engineer; John Kotes, Product Owner; Marguerite Hayes, Intranet Service Manager; Anne Maye, Team Sites Product Owner

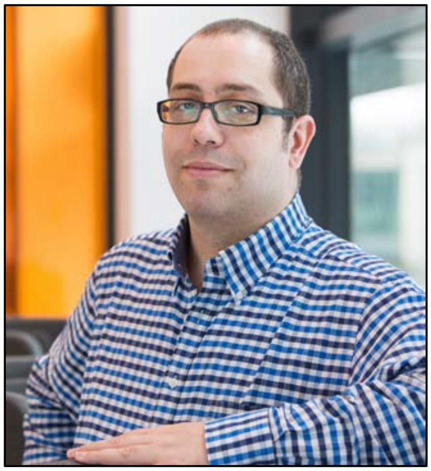
The Moment (Primary External Vendor): Anwar Mustapha, Digital Manager; James Monteith, Project Manager

Search and Service Gateway: Phil Pischke, Director, Self Service Solutions; Srini Raghavan, Manager, Search Innovation; Marcin Wasko, Technical Analyst; Malgorzata Szabelska, IT Lead, Search and Technical Architecture; Jakub Kontek, IT Specialist, Service Gateway; Fiona Saunders, Service Manager

Analytics and Strategy: Miles Tomlinson, Director, Global Digital Insights and UX; Jaclyn Kirkman, Digital Insights Manager; Tom Kludge, Digital Insights Manager

Global Content: Rachel Cooper, Director, Global Content Strategy & Editorial; Annie Newman, Senior Content Manager

INTRANET TEAM



Team members shown here (upper left): Joe Lees; (upper right): Karen Weingarten and Rich Wojnar; (bottom, left to right): Richard Gera, Phil Pischke, John Cavanagh, Srini Raghavan, and Chip Umsted.

HIGHLIGHTS ABOUT THIS WINNER

Calling the GSK intranet “large” is like calling the sun “bright.” As huge intranets often do, the GSK intranet had become unwieldy and inconsistent. This negatively impacted end users and content creators, who wasted effort acclimating on pages, searching for content, and reinventing the wheel each time they designed a new page or section.

While less-bold teams would have become discouraged or frightened when endeavoring to simplify content and create a consistent look and feel, the connect GSK team members did not retreat. Instead, they dug in and studied the design and content, and analyzed common page layouts and preferred styles. They learned about their users — including end users and content creators — and their common interactions.

Armed with this research knowledge, they held fast to the theme that “less is more” and focused on providing personalized, quick access to the most important and most used systems and services.

The team also focused on creating invaluable tools for publishers to ensure their success and design consistency. Templates, design patterns, “getting started” videos, a detailed manual, and a dedicated Yammer group are just some of the tools publishers have at the disposal. These boost content providers’ confidence and skills, while at the same time creating advocates for the tool and saving the company money on agency fees.

The “one GSK” mandate became the team’s battle cry, lifting it to create and implement proper branding across the entire intranet and helping everyone involved to do the same.

- **Brand template tool.** Surveying thousands of pages on the site, GSK intranet team members found commonalities and patterns in page elements. They then designed an easy-to-use, centrally controlled tool called the *brand template*. This streamlines the way pages are designed and lets users with no design or technical experience create a brand-compliant, consistent page. For flexibility, content publishers use a catalogue of commonly used page components, which lets them focus their efforts less on UI and more on delivering great content to their colleagues. The team was successful; there are now 2,000+ sites using the new brand template, which is estimated to have saved GSK millions of dollars that would have been spent on design agency work.
- **Assistance for publishers.** The 1,000–2,000 content publishers are not just sent off to fend for themselves with the brand template tool. Rather, they have video tutorials, detailed documentation, support staff, and a collaboration social feed where they can ask questions and get quick answers from experts. This toolbox of help boosts the confidence and productivity of publishers, and ensures efficient and consistent site design.

- **Simplified pages.** In several targeted areas, the designers made a concerted effort to display only the necessary or most important content on pages, rather than fitting in every piece of available related content. Examples of the site's many simplified pages include the *Services Gateway* page on mobile and the selection of only a few news items for the homepage.
- ***Services Gateway*****.** Trying to find the right process or person can quickly steal minutes, hours, or days from employees; it can also negatively impact their satisfaction and focus. The GSK intranet supports 140,000 employees and contingent workers, with a wide variety of job functions all around the world. If each employee wastes even 10 minutes a year looking for the right process to follow, 23,333 hours are wasted each year on that alone. Instead, the GSK intranet saves users' time on basic administrative functions. The *Services Gateway* consolidates everything admin-related that employees need and personalizes the links to them, so no hunting is needed.
- **Consistency.** With an organization and site this large, creating a consistent design, while still allowing teams and individuals flexibility, is an enormous undertaking. Still, many pages feature the same search, global navigation, context navigation, right rail, and content area. These common elements make it easy for employees all over the world to navigate the site, regardless of which section they are sampling.

BACKGROUND

Simplify First

The GSK intranet is very large. It has 400 site collections, 5,000 subsites, and thousands of content publishers and contributors across the world. Until recently, most of these sites had a disparate look and feel, so the goal with this most recent redesign was to simplify and reduce the system's content and create a consistent look and feel while providing tailored access to the most-used systems and services.

Under a company mandate to create "one GSK" and implement proper branding across the system, the GSK team analyzed common interactions, page layouts, display types, preferred styles, and brand elements. It also created the easy-to-use, centrally controlled brand template tool, which lets hundreds of content publishers create vivid, consistent, brand-compliant pages without having to rely on an agency for development.

Get to Know Your Audience

The key to the brand template feature's success was to develop an understanding of the audience the team was designing for so it could also create appropriate support materials. This support includes live training, short getting-started videos, a detailed and picturesque PDF manual, a dedicated Yammer group, and a PowerPoint file designed to help users plan page layouts before building pages. The tool gives intranet publishers confidence in their own skills and turns them into advocates for the tool.

Initially, the tool's design was complicated. Through several rounds of user studies and testing materials with content publishers, the team overcame its initial learning curves to create the self-service tool.

The brand template has not only delivered brand consistency on thousands of pages, it has also improved the overall UX as it limits customizations and is centrally controlled. Further, it has driven significant cost savings.

Because the elements of the brand template are centrally controlled, the team can significantly change the look and feel across every page using the template without requiring content publishers to make a single edit. That functionality is possible only because of the way GSK created the tool.

In 2018, the intranet will undergo a system upgrade and redesign. The plan is to focus on the UX, with the goal of making the vast intranet appear smaller to the individual by providing tailored and targeted content, and enabling opportunities for a more personalized and social overall experience. The team will also review and improve governance and add further self-service guidance.

Challenges

The GSK team faced a very specific challenge: supporting a large population of publishers with a tiny intranet team. Because the GSK intranet is so large, the company can have anywhere from 1,000–2,000 people publish content at any given time, creating a support challenge. The intranet team needed not only to create a tool that would simplify the number of page elements and streamline the look and feel, but it also had to ensure the tool was easy to use and had the right kind of support materials to sustain the change and lead to significant cost savings.

The designers also needed this army of publishers to become advocates for the tool and process. They knew that creating a core team of initial advocates would help spread brand compliance and consistency across the organization.

All of this had to be accomplished with a tiny intranet team, so it had to ensure that the support materials could take the place of initial hands-on live training.

Building Adoption Momentum

Uptake of the tool was deliberately slow and steady. Designers carefully communicated with site owners, letting them know that the tool would be available and building up interest over time. They also recruited key top-level business sites to become early adopters. They strategized that, if they got early adopters on board, it would help ensure that interest would build quickly as others would want a piece of the pie.

They did not, however, mandate that everyone adopt the tool at once because doing so could potentially cause an uproar — and also because they frankly couldn't support a flood of new users all at once with such a tiny team. Their mantras were: If you are creating a new site, you should use the tool. If you are planning on updating existing content, you should use the tool. Aside from that, they did not force the tool on sites without specific activity plans.

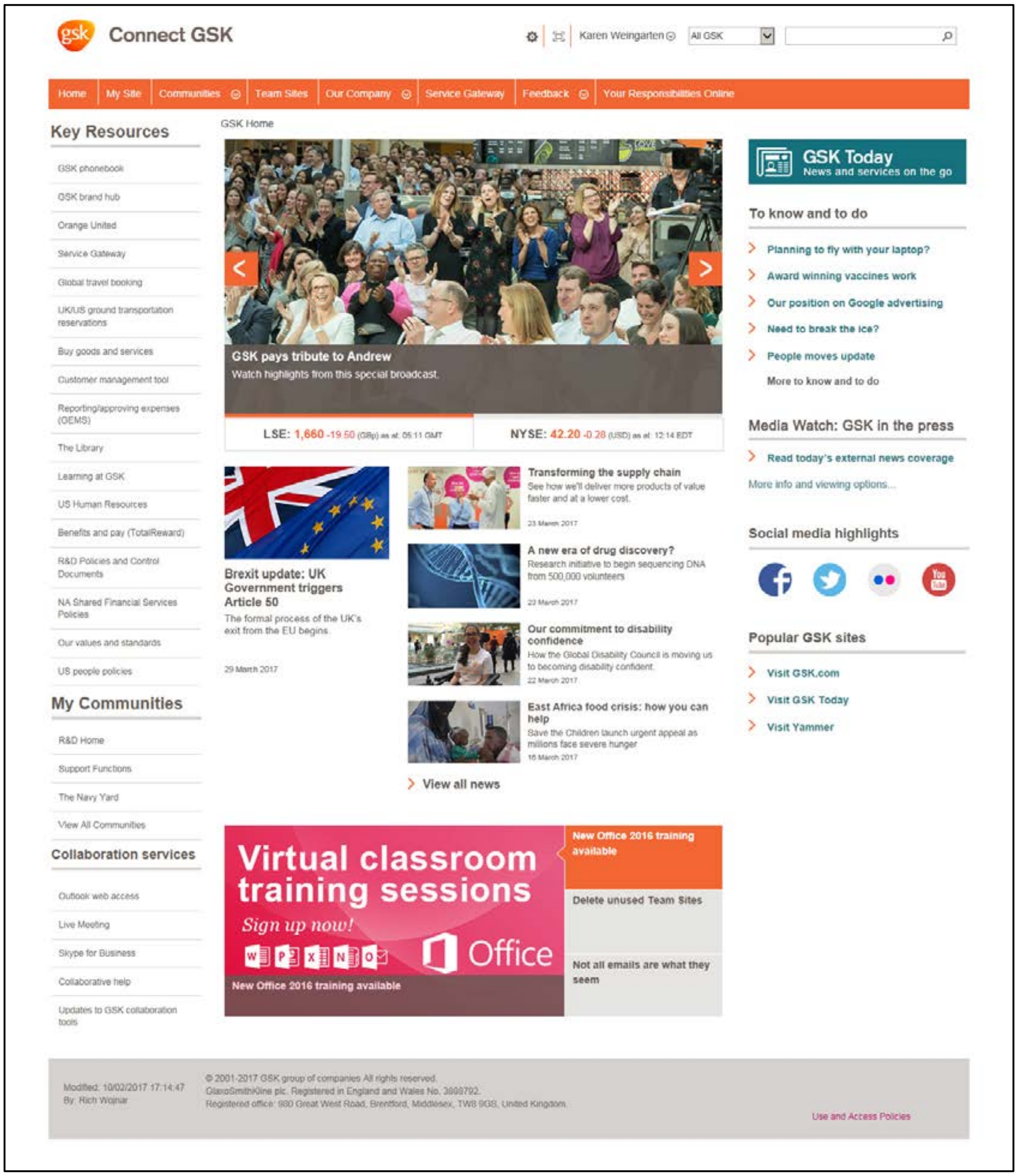


Image 71. GSK Intranet Old Homepage. The previous homepage design had an overwhelming amount of news, with 15 news articles and two carousels on the page. Users told the intranet team they couldn't see past the clutter; metrics validated that feedback. The need to simplify drove the redesign effort. *71_GSK_01_home_before.png*

Image 72. GSK Intranet Old Brand Template Site. An example of the original brand template site featuring previous brand-compliant visuals. The look and feel was modified centrally. No work had to be done by the site owners to revise the page design elements, as every site in the system that used the brand template would instantly see the design change. *72_GSK_02_brand-template_before.png*

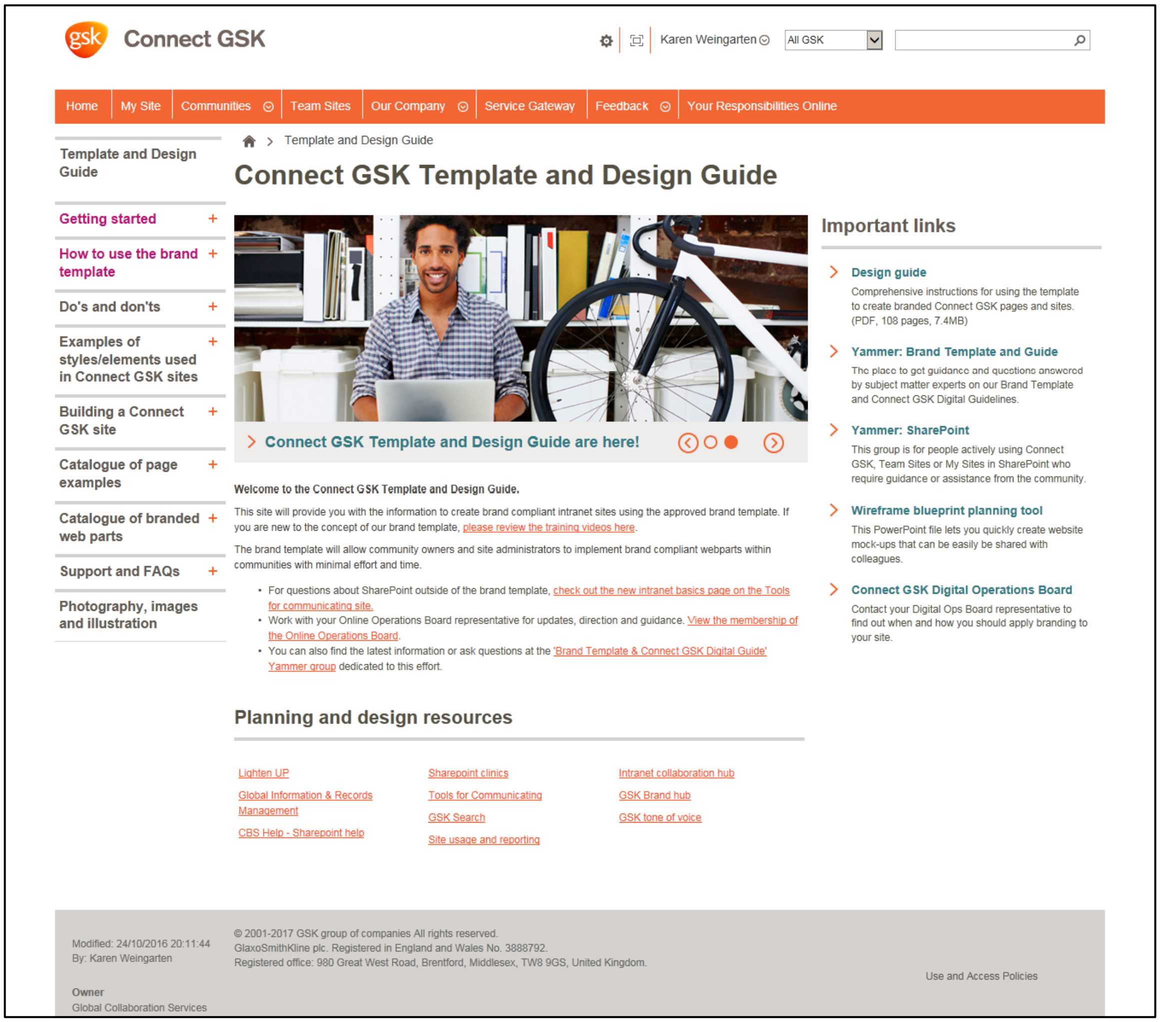


Image 73. GSK Intranet New Brand Template Site. The new brand template site provides site owners and publishers with information they need to create brand-compliant intranet sites using the approved tool. The brand template lets community owners and site administrators implement brand-compliant elements within communities with minimal effort and time. *73_GSK_03_brand-template_live.png*

DESIGN REVIEW

Homepage

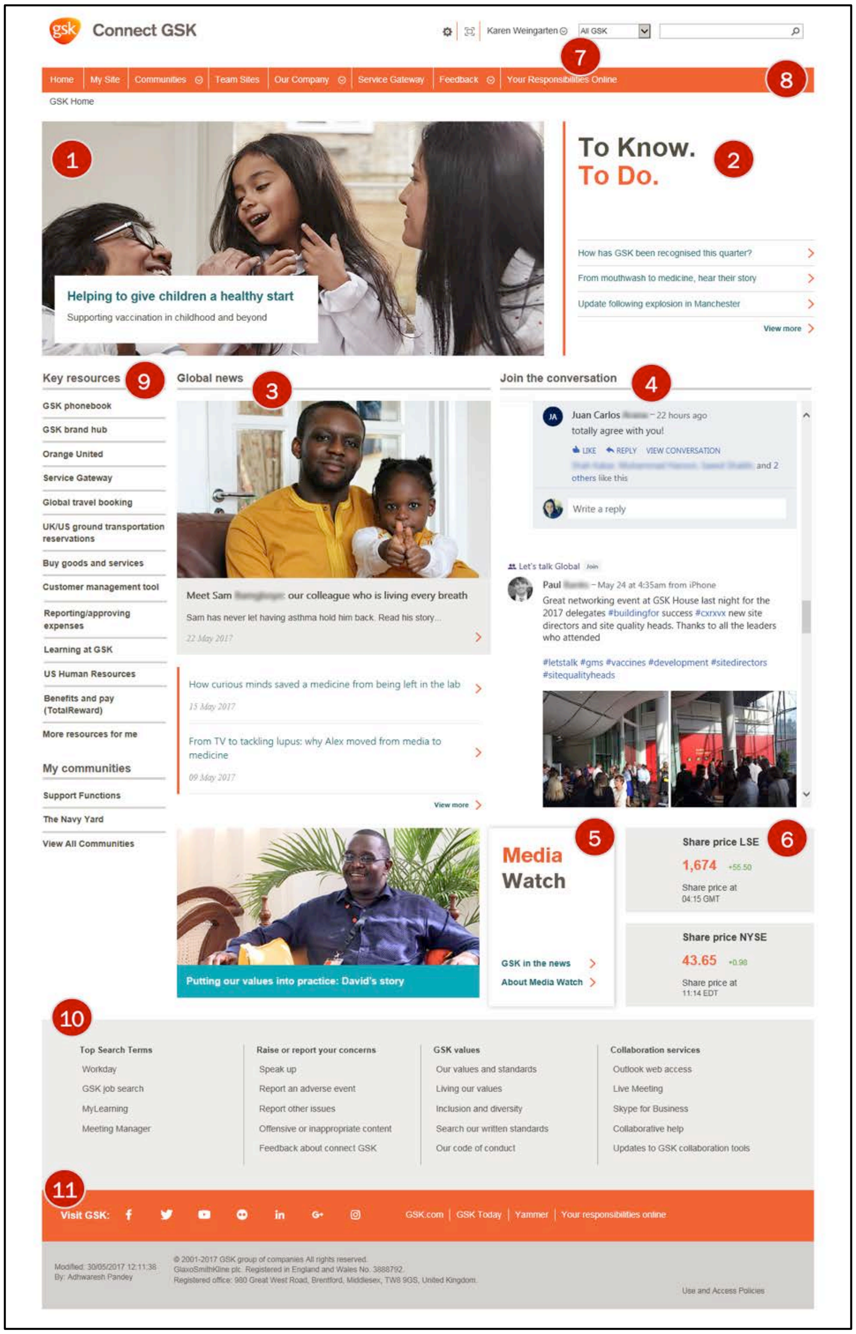


Image 74. GSK Intranet Homepage. The connect GSK intranet homepage selects a few news items to showcase, and it supports users with global navigation, context navigation, and a large page footer.
74_GSK_04_home_live.png

Homepage Highlights

Designers worked industriously to simplify the homepage, since it is the default browser page for most employees. While several sections are offered, the page is not inundating. Each section targets only a few pieces of content at most, and the page curates what's important for employees. Knowing that their users are usually "on a mission" when they go to the intranet, designers wanted to make it easy for them to quickly sample anything compelling, then return to their original task. The optional top banner spans horizontally across and is used for special announcements or reminders. It also sometimes serves as a countdown feature: one more day until… and it can be turned on/off as needed.

1. **Feature article.** A big chunk of the upper left of the page is dedicated to one featured news item, which includes a large image, a title, and a subtitle. To make the text on an image legible, designers added simple aesthetics: a white background rectangle behind the text, which makes it much clearer than if it had appeared directly on the image. Designers consulted their research and site goals when deciding to go with only one main news item and very little text, rather than multiple news items and more text, in homepage's top section.

2. ***To Know. To Do.*** The right top section of the homepage is mostly white space, so the text that is there is very noticeable. The few words, *To Know. To Do.,* are written in large bold black and orange letters on the white background. The message these words deliver to employees is that they should pay attention to this section. The section's three announcement or news items include minimal green links. The *View More* link below the three items advertises that additional items exist.

3. **Global news.** Below the spotlighted news item is a set of internal news items. These are created by the company's Global Communications team and are relevant to everyone in the company. These items help keep employees abreast of outside influences and occurrences they should be mindful of in their work.

4. **Join the conversation.** This section includes an embedded Yammer feed, which usually features a discussion around a specified group, hashtag, event, or spotlighted story. This section had to be revised after the initial launch, as pulling the live Yammer feed into the page put a strain on the page load. To resolve this, the team used the space to highlight a targeted Yammer conversation that can be accessed with one click.

5. **Media watch.** This section ensures that employees can quickly access information and what is being said about GSK in the press.

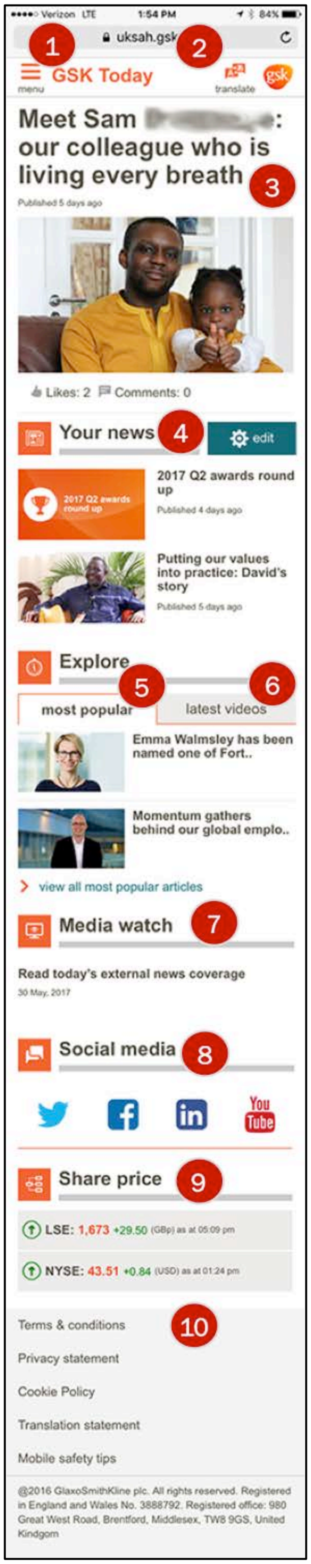
6. **Share price.** User feedback showed that GSK employees liked having the stock price on the homepage. In the new design, it stayed on the page but was moved below the fold. Posting this information on the homepage is a good idea on many intranets; positioning it below the fold lets interested employees access it with only a bit of scrolling.

Also, inevitably, any stock price will drop, so putting it below the fold avoids immediate demotivation of employees when drops occur.

7. **Search.** A drop-down list defaults to *All GSK* so people can search the entire intranet, or choose a subset to search within. Defaulting to the all choice means that people who don't notice or remember the drop-down list will not be confused by a scoped search.
8. **Global navigation.** The orange background makes the horizontal navigation intelligible on the white page. The links lead to important intranet sections such as a personalized page, communities, team sites, information about GSK, services such as IT help, a method for giving feedback, and GSK's standards. The navigation is available in 13 languages and is determined by the user's browser preferences. GSK has a significant global, including commercial operations in more than 150 countries; a network of 87 manufacturing sites; R&D centers in the UK, US, Belgium, and China; and employees and contractors in all of these locations using the intranet. Multi-language support therefore ensures that all employees can access necessary and helpful information via the navigation.
9. **Left navigation.** The left navigation links are targeted to the logged in user based on his or her business area, location, role, and language. The top section of links falls under the *Key resources* heading, and includes topics such as brand guidelines, travel booking, purchasing, and HR. Services are identified specific to a country or business area. For example, an employee in the US is served the US HR links and the US-specific travel booking tool. The *More resources for me* link at the end of the *key resources* list gives users a place to go if the homepage doesn't display what they are looking for. It also suggests that these are not just generic links, but rather are targeted toward the individual. The navigation's lower section, *My communities,* shows key communities relevant to the user, such as his or her business unit and location page The *View All Communities* link at the end of the list helps employees find more communities of interest.
10. **Bottom section.** The gray background of the large footer at the bottom of the homepage helps it stand out from the rest of the white page. The footer is sectioned into four parts: each has a heading and is demarked by vertical lines and clear columns of links. Four of the *Top Search Terms* appear in the left-most column. This helps users see what their colleagues are interested in. Next is the *Raise or report your concerns* section, with options for discussing issues; these activities can help improve the workplace. These links are also found via the global navigation, but displaying them on the page, rather than collapsed in the menu, makes them more visible. And, while it would not make sense for global navigation to remain open and take up most of the top of the page, this "doormat" style design is helpful as a footer. The fourth column, *GSK values,* offers links to what the company views as important, including *standards, code of conduct,*

and *diversity.* Finally, the fourth column, *Collaboration services,* consolidates online tools and methods that employees can use to collaborate, such as Live Meeting and Skype for Business. This list makes it fast and easy for employees to locate these needed tools.

11. **Social.** Icons for GSK's social sites — such as Facebook, Twitter, and LinkedIn — make it easy for employees to read and participate in discussions on customers' views of their company.



Mobile Homepage

Image 75. GSK Intranet Mobile Homepage. The connect GSK intranet homepage on mobile phones collapses the global navigation into a hamburger with the word *menu* in the upper left, and promotes the top global news item. *75_GSK_05_mobile_live.png*

Mobile Homepage Highlights

Key resources related to news, the *Service Gateway*, and several other core applications are available on mobile via a separate, mobile-accessible website called *GSK Today.* Because the intranet supports 140,000 employees and contingent workers — many of whom are in the field, factories, or laboratories — mobile access is imperative.

1. **Navigation.** On mobile, the global navigation collapses down from the desktop version's horizontal menu links to a hamburger icon accompanied by the word *menu* in the upper left. The *menu* label takes up very little space but helps clarify what the hamburger icon is for unfamiliar users.
2. **Translate.** In the upper right is an icon with the label *translate*. This lets users translate the content into any of 25 different languages. Because employees work in more than 100 countries and speak 13 primary languages, translation is an essential feature.
3. **Top news item.** News stories displayed on the mobile site are selected from those suitable for internal release, but that do not contain sensitive information. An important news item displays at the top of the mobile homepage, with a mobile-friendly image and large, sans serif black text on a white page background. These traits make the content easy to scan on a small screen.
4. **Your news.** This section displays a few news headlines and thumbnail images related to topics users have indicated an interest in. The label *Your news* makes it obvious that the section is customized, while a teal button with the cogwheel icon and *edit* label communicates the ability to customize it further.
5. **Popular articles.** The most popular articles appear halfway down the page under the *Explore* heading in the *most popular* tab. The *view all most popular articles* link lets interested employees easily access more news.
6. **Videos.** The *latest videos* tab shares the horizontal space with the *most popular* tab and displays a few of the internal videos.
7. **Media watch.** Press clippings keep mobile users apprised of what is being said in the press about GSK.
8. **Social media.** Employees can be reminded of and quickly access GSK's social channels on Twitter, Facebook, LinkedIn, and YouTube. This helps them join the discussion with their customers from anywhere in the world.
9. **Share price.** As on desktop, employees can scroll to see the current GSK stock price on both exchanges on which it is listed.
10. **Footer.** Administrative information, such as the cookie policy and privacy statement, is visible in the footer at the end of each page.

GSK Service Gateway

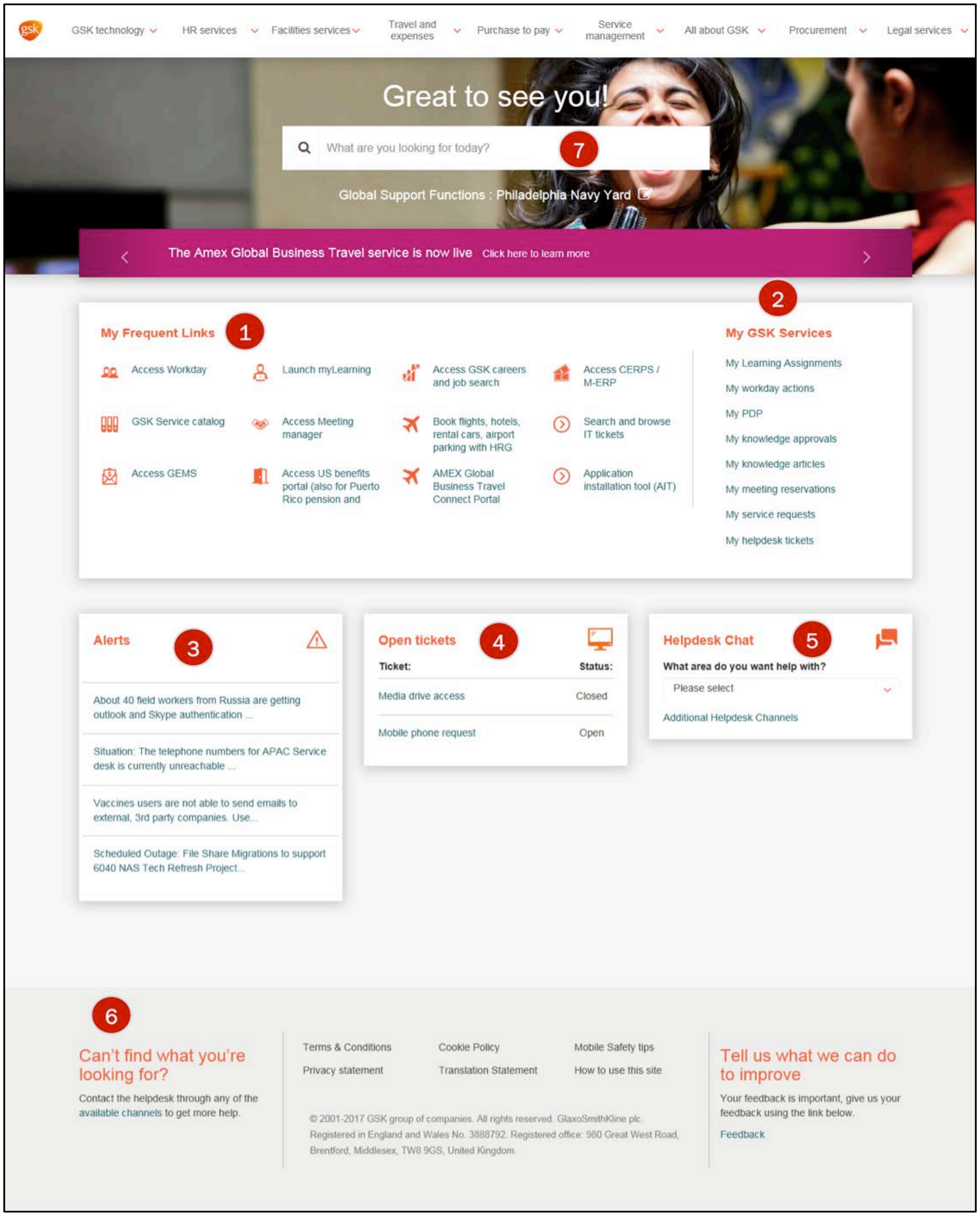


Image 76. GSK Intranet Service Gateway. The *Service Gateway* section of the GSK intranet offers key tools based on each employee's location, facility, and business area. *76_GSK_06_service-gateway_live.png*

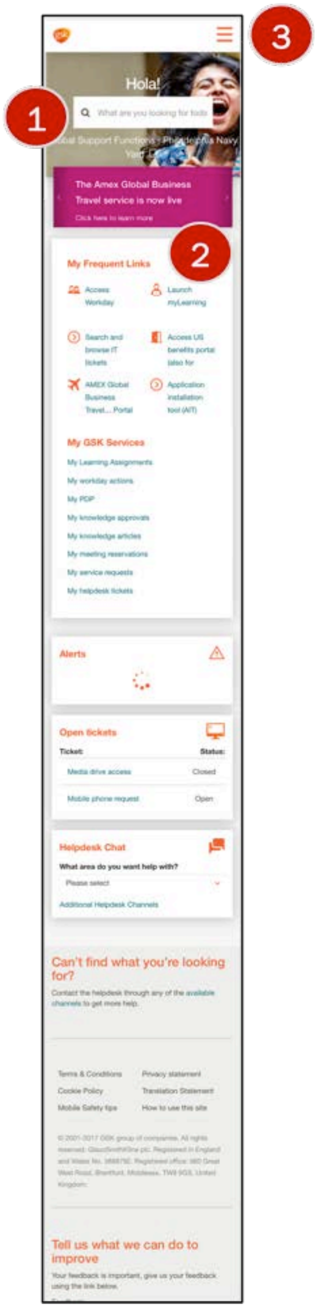
GSK Service Gateway Highlights

The *Service Gateway* section provides links to key tools, including services, live chat, and alerts. This is the go-to section for employees looking for information and help to get things done at GSK. The links are based on the employee's location, facility, and business area. Available in 50 countries and 21 languages, this section is popular among employees, with 5,000 user interactions each day.

1. ***My Frequent Links*.** The page's top section displays a dozen links organized in three columns. The space between the links makes them easy to scan and thus helps employees easily find particular tools. Within the settings, the users can set their country, business unit, location, language, and type of content, which will then filter the content that they see, displayed in the selected language.
2. ***My GSK Services*.** Tools that most employees typically need appear in a column under the *My GSK Services* heading*.* Items ranging from pay stubs to meeting reservations to expense reports and informative articles are just a click away. Each link leads with *My,* signifying that the upcoming page will be personalized to the user. Consolidating these tools in one place and naming the links with typical (rather than branded) terms means employees don't have to know which group or individual to go to or the brand name of particular tools. Rather, employees can navigate to this intranet section and scan for natural-language words, confident that they will find what they need.
3. ***Alerts*.** The first column informs people of the status of tools, such as when the intranet will be down for maintenance. Housing this information on this page means users can learn where it is, and find it when they need it.
4. ***Open tickets*.** Lower in the right rail is a list of help resources, technical information, and the service requests list related to the user. Users can see a ticket's topic — such as *Service Request* or *MyLearning* — and the date the request was made.
5. **Chat online.** If employees can't find an answer on their own, never fear, they can use the chat feature to request assistance. To direct the question more accurately, employees first answer two quick questions via the drop-down lists, choosing a topic and the language they prefer to communicate in.
6. **Help desk contacts.** The Help desk contacts at the end of the page offer another safety net. Employees may call a main number or search for an individual in the department they need.
7. **Search.** Finally, employees can use the search function at the top of the page to help them find information they need. This scoped search is different from the main site search, as it focuses specifically on the tools, services, and documents in the intranet's *Service Gateway* area. For example, if an employee moves to a new home and searches here for "change address," the search would return the results "How do I update my personal information at GSK," with links

to various systems that require the employee's home address (such as the HR Workday tool, American Express billing, and expense report systems).

GSK Service Gateway, Mobile



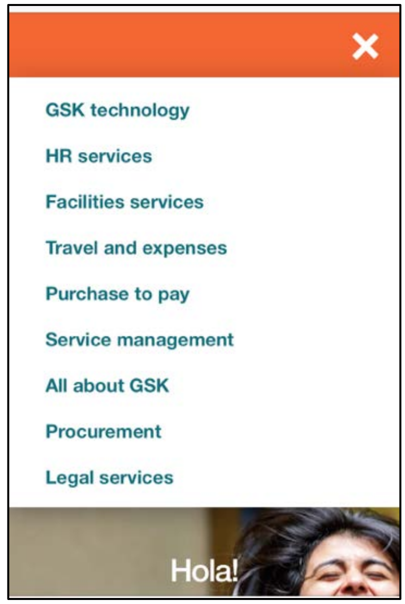


Image 77. GSK Intranet Service Gateway — Mobile View. The mobile phone version of the site's *Services Gateway* section adapts the desktop view to a more consolidated layout (left screen) and the hamburger menu expands to show a set of global navigation options (right screen). *77a_GSK_07a_service-gateway_phone_live.png* and *77b_GSK_07b_service-gateway_phone_menu_live.png*

GSK Service Gateway, Mobile Highlights

The simplicity of this screen makes it easy for users to scan to services they need.

1. **Search.** Employees can search for help services on mobile, as on the desktop. The field appears at the top of the page.
2. **List of links.** The person's most-used links related to tools and services appear in this list.
3. **Hamburger menu.** The menu in the upper right opens to reveal global menu choices (see right screen above).

GSK Service Gateway, Tablet

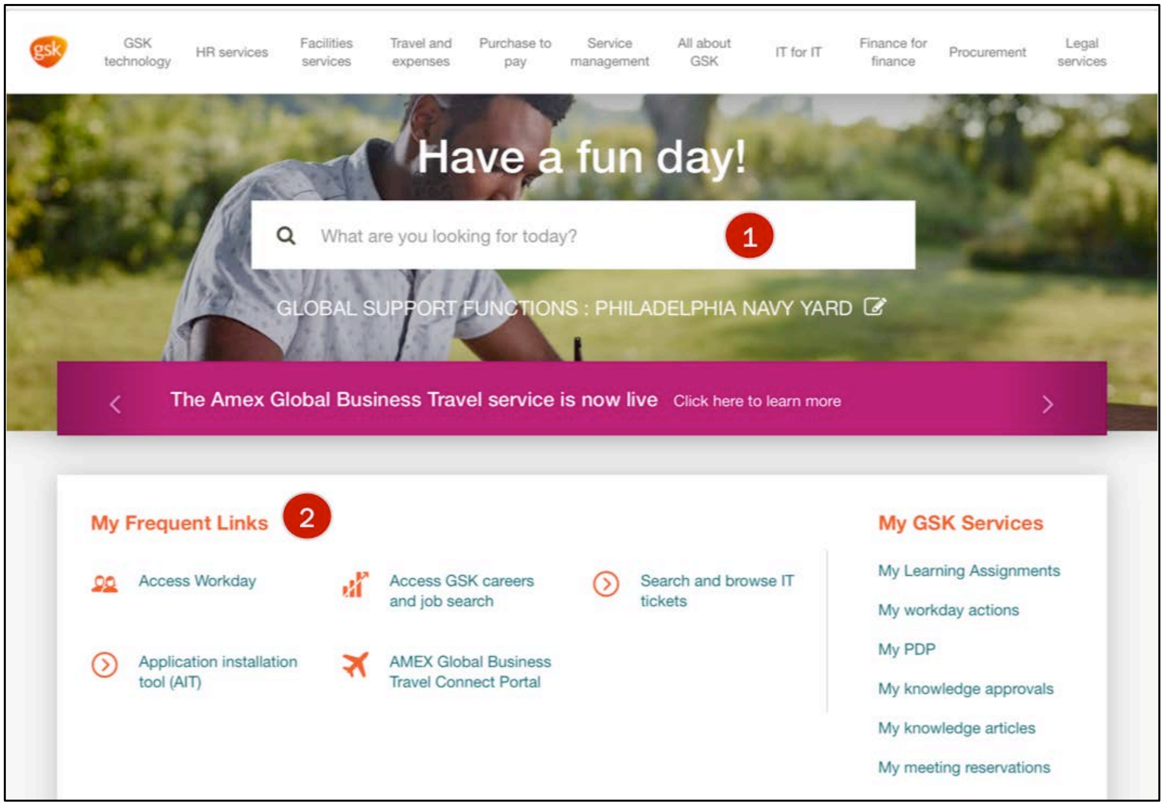


Image 78. GSK Intranet Service Gateway — Tablet View. The tablet version of the *Services Gateway* page makes elegant use of the screen size. *78_GSK_08_service-gateway_tablet_live.png*

GSK Service Gateway, Tablet Highlights

1. **Search.** Employees can search for help services, as on the desktop. The field appears within the hero image toward the top.
2. **Links.** Each section of links is organized to be easy to scan on the tablet screen. Here, three columns — versus one column on phones and five on desktop — make the page seem helpful but not cluttered.

Communications Team Resources

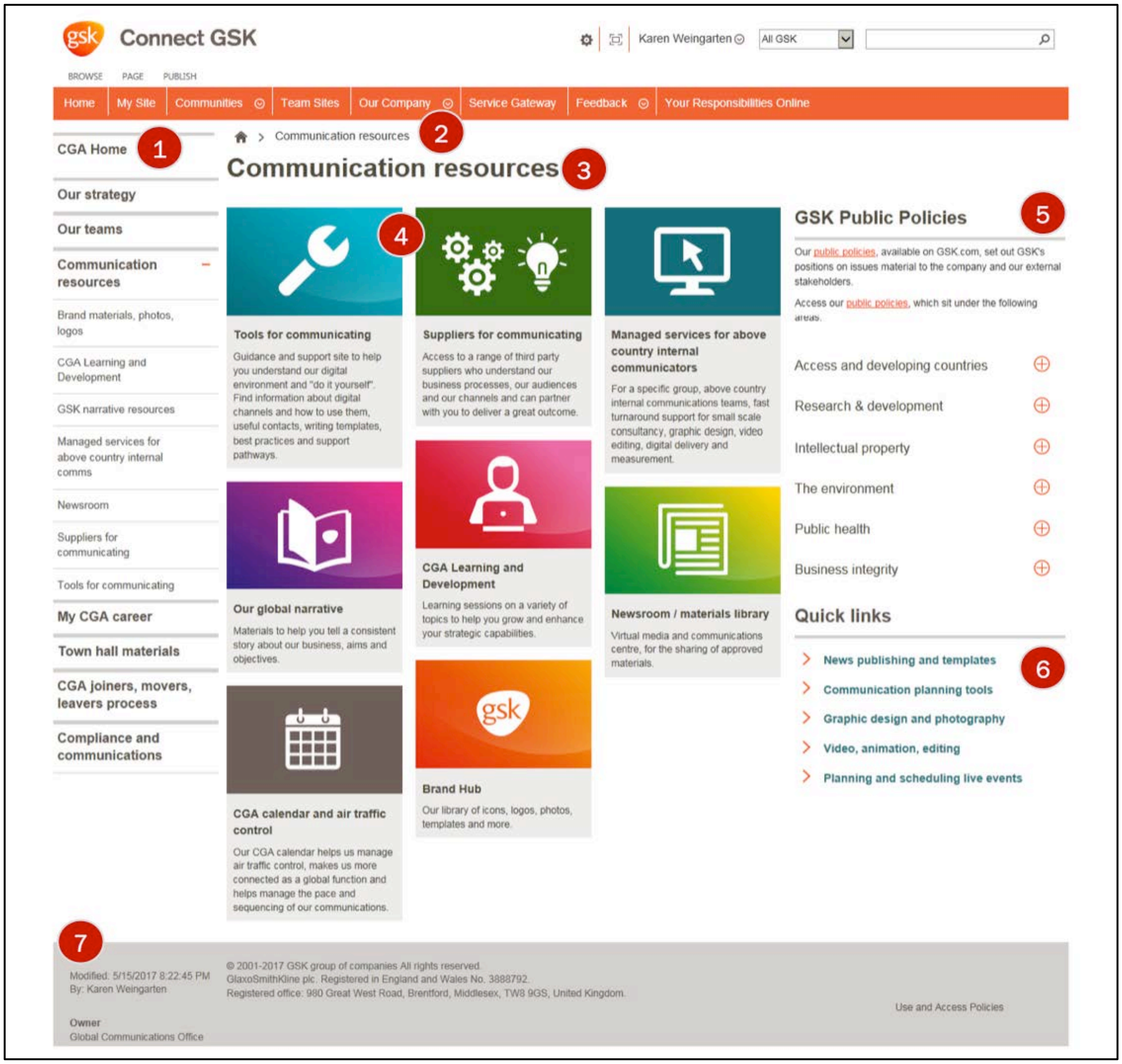


Image 79. GSK Intranet Communications Team Resources. The Communications and Government Affairs team members use this page to access the key tools and services they need to do their work. *79_GSK_09_resources_live.png*

Communications Team Resources Highlights

The GSK intranet offers pages for teams that require common resources. These pages have similar layouts, which helps employees who work with more than one resources page. This page lists key tools, services, and sites for GSK's Communications and Government Affairs team.

1. **Left navigation.** The left-side context navigation is related to the selected section — in this case, *Communications resources.*
2. **Breadcrumb.** The breadcrumb clearly displays the site section the page is housed in.
3. **Page title.** The page title is in large, bold text, making it easy for users to confirm that they are in the right place.
4. **Content section.** Large white brand-compliant icons in different colored rectangles signify the page's different sections. Titles and summaries below them describe each section's purpose.
5. ***GSK Public Policies*.** The top section in the right rail houses links to the organization's public policies on topics such as research and development and public health.
6. **Useful links.** Links to additional helpful and relevant content are listed toward the bottom of the right rail for easy access.
7. **Page information.** Connect GSK has 450 site collections, 5,000 subsites, thousands of content publishers, and contributors across the world. Thus, the knowledgeable intranet design team uses not only content communities, templates, training, and much more for their contributors, but also clever UI components to keep page content updated. Pages list the individual page author, the team that owns the page, and the date and time it was last updated. This information makes it easy to track and find old content, as well as the people to contact about updating or removing it.

Community

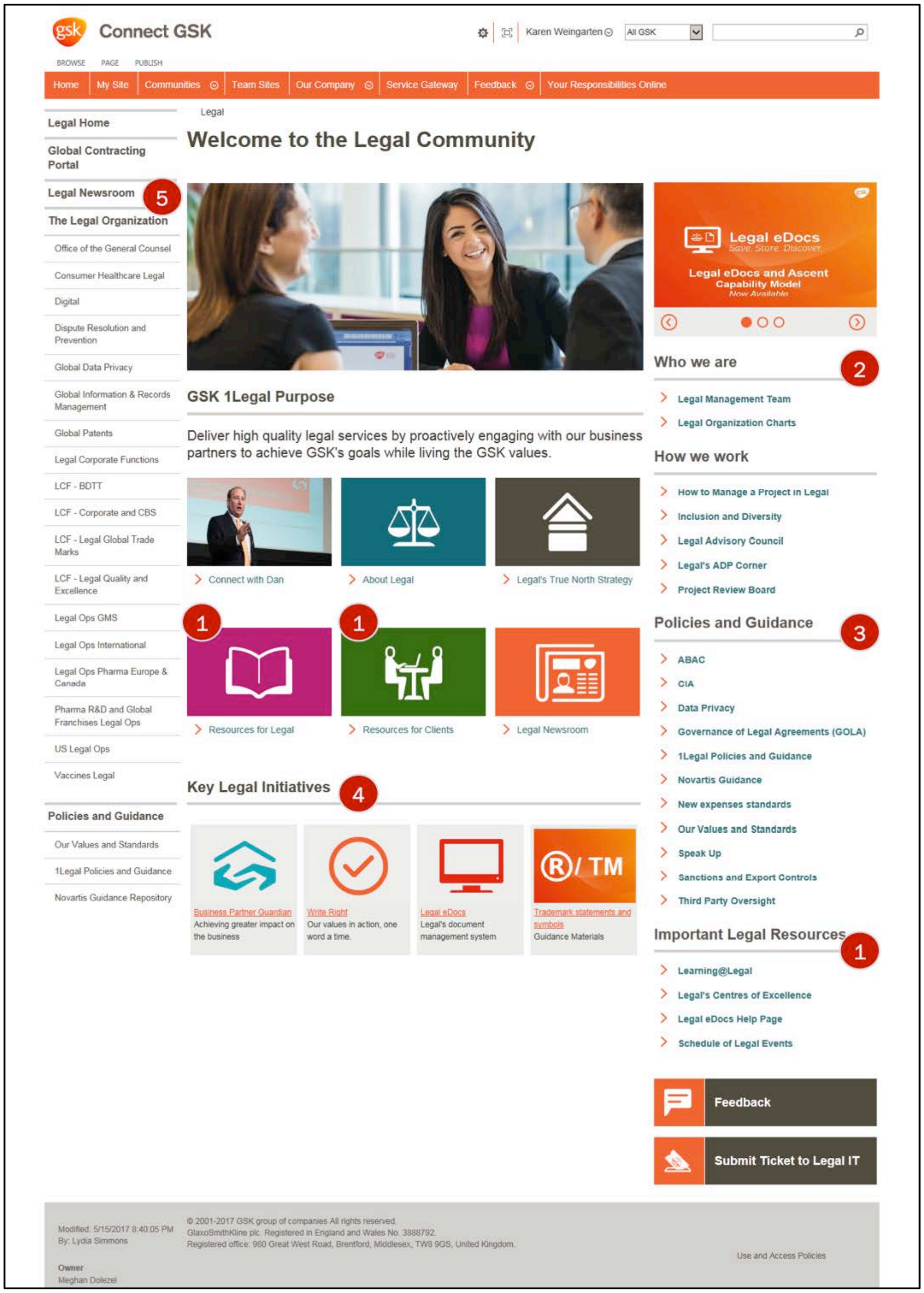


Image 80. GSK Intranet Community. The Legal department, like many others at GSK, created a community to help its own team members as well as employees who need its services. *80_GSK_10_dept_live.png*

Community Highlights

Many GSK teams and departments have communities with pages on the intranet. Some pages provide information for consumers of that team's services, such as information about the department, contact information, and related resources and services. The legal team's community consolidated the content of what were eight separate sites into one helpful community on connect GSK.

1. **Resources.** The legal community's main page offers links to resources for the Legal department and its clients in the page's main section and the bottom of the right rail.
2. **About.** The top section of the right rail includes information about the management team, the rest of the organization's team members, and how the team functions.
3. **Policies.** Links to specific legal and corporate policies appear in the lower section of the right rail. The heading *Policies and Guidance* makes this section easy to scan to.
4. **Initiatives.** Curious employees can easily get a sense of the department's current priority areas via the *Key Legal Initiatives* near the bottom of the content area.
5. **Left navigation.** Several topic links — many related to the Legal department — appear in the left context navigation. Other topics include the latest legal news and contracting.

Community with Yammer Feed

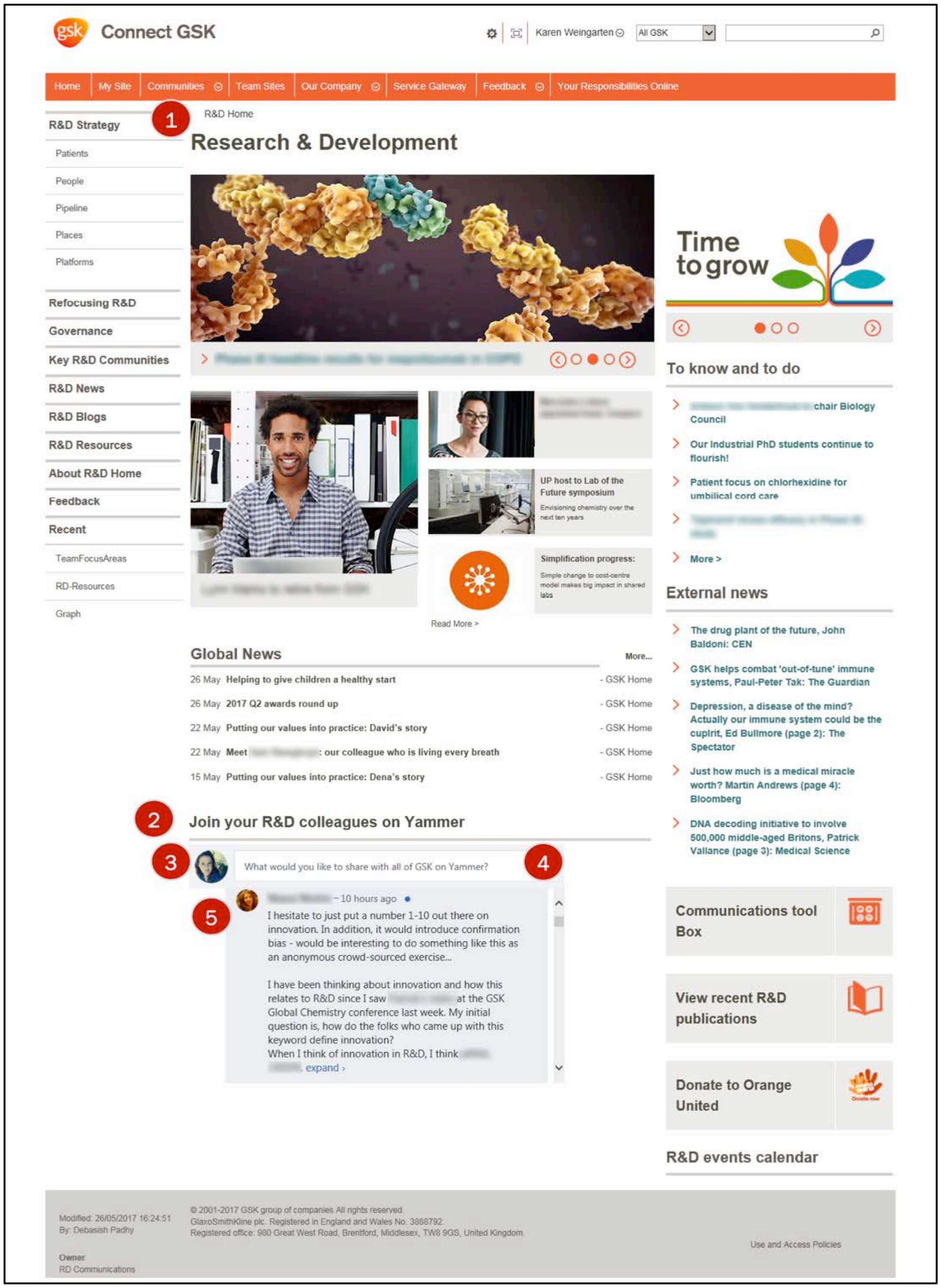


Image 81. GSK Intranet Community with Yammer Feed. The Research & Development community on the GSK intranet embeds a Yammer feed on its main page to encourage conversations. *81_GSK_11_social_live.png*

Community with Yammer Feed Highlights

Conversations have earned a special place within the GSK intranet's various community sites. In fact, many communities embed a Yammer feed to support and encourage discussions. People carry on conversations about various topics, hashtags, and audience groups, some of which are enormously popular. For example, one hot topic — GSK's CEO transition — generated 1,600 comments. During the CEO transition, GSK's offices around the world shared photos and comments via Yammer as they watched the simultaneous global broadcast. It was a fantastic way to see everyone, feel like one company, and sense the energy during the event to welcome the new CEO.

Placing feeds on communities implies that the topics discussed will be related to that community, which boosts user's confidence to write and respond. Also, having the common interest of the community itself means employees who go there actually have shared goals and challenges, so they will naturally write to one another. Having common needs helps to make the community a valuable place to interact.

1. **Position.** The collaboration feed is strategically located: on the main page of the R&D community, just below *Global News.* Placing it on the main section page demonstrates that what the employees say and think is important enough to highlight rather than bury. Further, placing it under the news items gives employees an opportunity to scan the news and be inspired.
2. **Yammer section title.** The section title, *Join your R&D colleagues on Yammer,* not only describes what the section is, it calls members to write something.
3. **User's image.** The small user photo might inspire users to see themselves as authors.
4. **Prompting to share.** The field to write in is located at the top of the section. The label, *What would you like to share…*, could help users think about what they have been wanting to talk about.
5. **Latest conversations.** The most recent posts appear at the top of the feed, showing the author's picture and name, and the amount of time since the post was made.

Yammer Feed

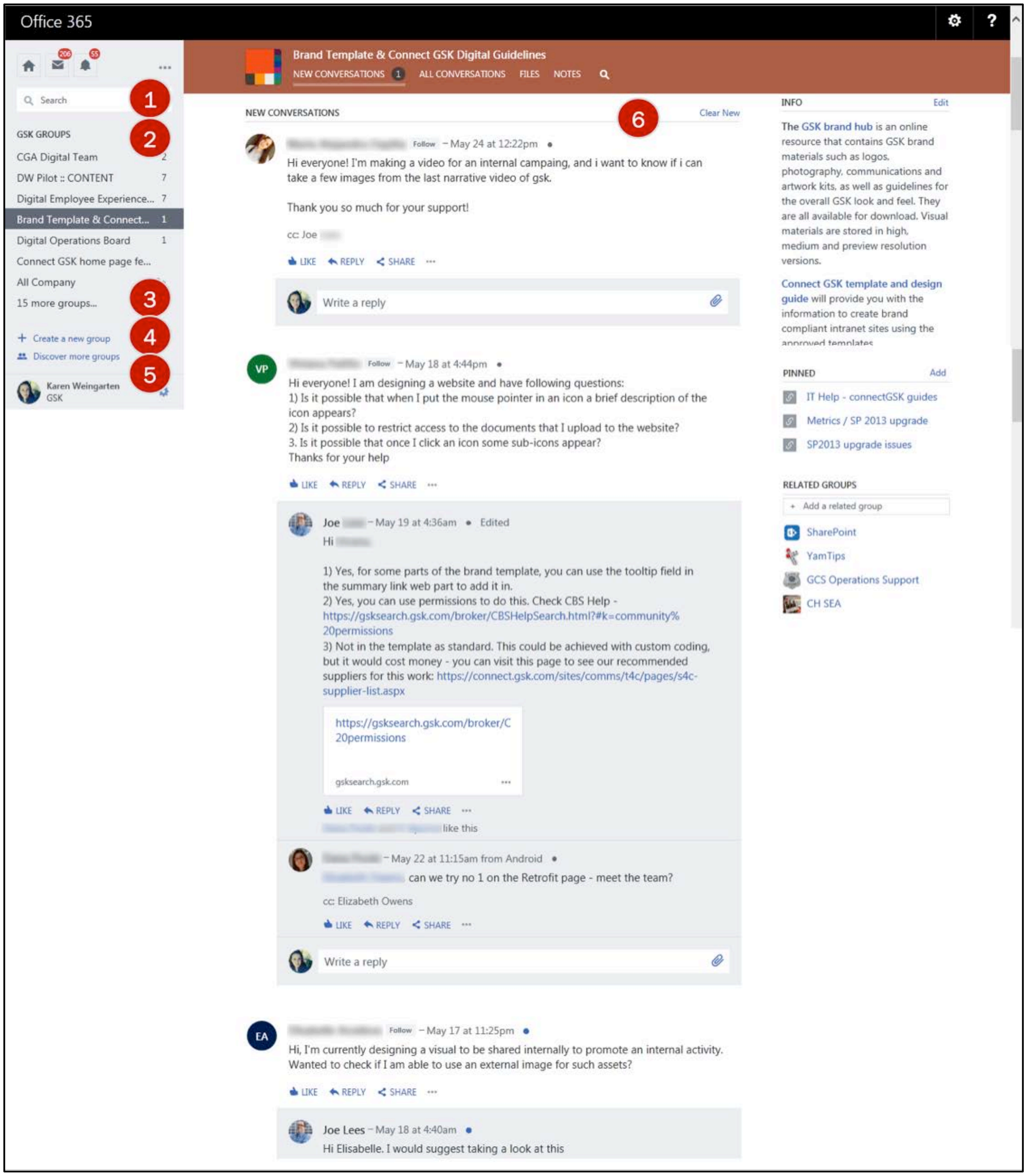


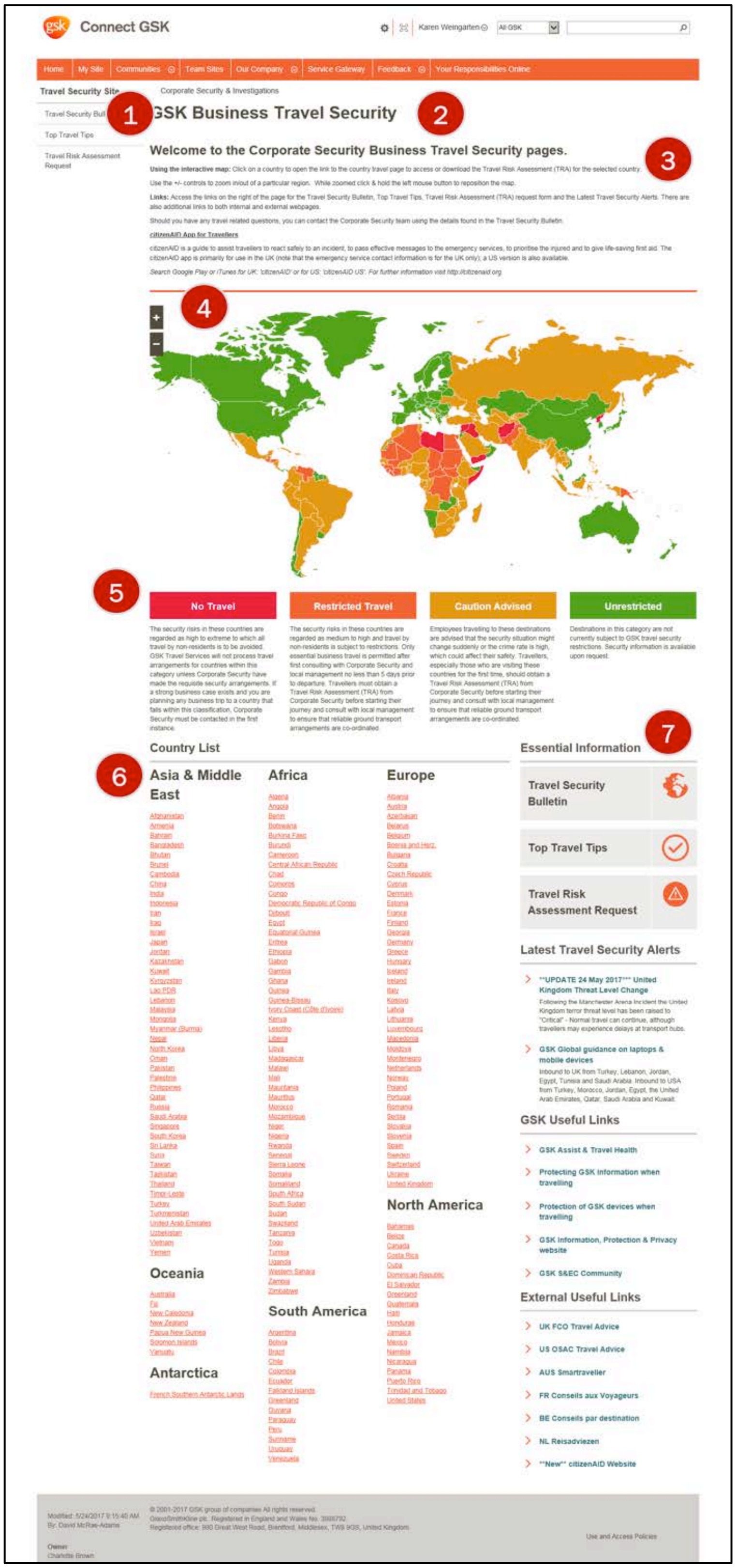
Image 82. GSK Intranet Yammer Feed. In this Yammer feed example, a group collaborates on the GSK intranet's template tool.
82_GSK_12_collaborate_live.png

Yammer Feed Highlights

The GSK intranet enables discussions with Yammer feeds, which are all located in one intranet section. Users in a community can often find Yammer feeds embedded on pages within that community, and people typically link to the group feeds via those embedded feeds. However, storing all the group feeds in one area ensures that employees can find specific discussion topics they are interested in.

In this Yammer group, novice users of the brand template tool and subject matter experts alike participate in helpful, lively discussions. This ensures that the intranet's brand template tool is being used most effectively and efficiently.

1. **Search.** Users can search for Yammer groups via a field that searches only Yammer groups.
2. **List of groups.** The groups are listed alphabetically on the left side of the page. Selecting a group displays the group's current conversation in the page's content area.
3. **More.** The groups that are not visible in the list can be accessed via the *15 more groups…* link at the end of the list. It's helpful that that number of groups is noted, rather than just a vague *more groups* link.
4. **Create.** The plus-sign icon accompanied by the label *Create a new group* provides an obvious way to start a new discussion group.
5. **Discover.** The *Discover more groups* link is a great way for employees to find topics they are interested in. Located near the link to create a new group, it's also a reminder to scan for groups to ensure the one you are planning to create doesn't already exist.
6. **Conversations.** The layout for the selected group's current conversation employs an expected wall feed interface and displays the most current comment, the author's photo, the date and time it was posted, and options to like, reply, share, and comment.



GSK Business Travel Security

Image 83. GSK Intranet Business Travel Security Section. The GSK intranet's *Business Travel Security* section helps the many employees who travel for business determine the safety of possible destinations. *83_GSK_13_travel_live.png*

GSK Business Travel Security Highlights

With ever-changing travel restrictions and security circumstances in the world, GSK needs a mechanism to communicate its travel security vision to its many staff members navigating the globe.

The map provides an at-a-glance view of the world, and offers immediate insight into the locations where travel is sanctioned or should be avoided.

1. **Navigation.** In the left-most column are links to the travel bulletin, travel tips, and making a request to help assess the risk for particular trips.
2. **Title.** The page title is large and legible. The text is understandable, and it confirms that employees can find accurate information about travel security on this page.
3. **Summary.** The text at the top of the page houses a wealth of information, including how to interact with the map and the list of links. It also links to and describes a valuable resource — the *citizenAID* app for travelers — which offers assistance in emergency travel situations, such as reacting to a safety incident.
4. **Map.** The world map is displayed with a simple iconic view, with each country outlined in thin white borders. Each country's color indicates a level of travel restriction that corresponds with the country's status. Clicking the country in the map (or in the list of links below it) displays travel restrictions, policies, and other considerations about traveling to that country. For a quick overview, users can match the color of the country in the map to the color of the travel state below it.
5. **Legend.** Below the map are the names of four states of travel restriction: *No Travel, Restricted Travel, Caution Advised,* and *Unrestricted.* Each name is written in a box in the color that represents that state. Below each is a general description of what each rating means, and how employees should proceed accordingly.
6. **List of country links.** Many countries that GSK employees travel to are also listed as links on the page. The links are organized first by continent — with all seven written in large, bold black text — and then sorted alphabetically under the corresponding continent's name. Clicking a country name link (or on a country in the map above) displays travel restrictions, policies, and other considerations about traveling to that country. This list also provides a good way for employees who are color blind or blind, or who are less familiar with world geography, to learn about travel restrictions.
7. **More information and alerts.** Alerts communicate the most recent important changes in travel security. The *External Useful Links* area shows five resources that GSK has deemed helpful for its employees. Also, the same tools in the left navigation appear as buttons below the *Essential Information* subheading.

DESIGN PROCESS AND USABILITY WORK

Approach

Given the disparate designs that existed across the company's previous huge intranet, team members started the redesign project by simply analyzing the types of page layouts and content. This exercise helped them reduce the pages down to four general page types: landing page, two column, one column, and library. They also broke the content down into a few basic types: titles, news carousels, call-out quotes, buttons, features, bulleted lists. They then worked with the brand team to design a few visual styles for each content type.

After looking at thousands of pages, the team quickly realized that while each site looked different, they had many things in common. For example, every site had bulleted lists in many colors and styles. The team thus decided to design a small catalog of lists and turn hundreds of bulleted list styles into six brand-compliant styles:

- **Standard link list:** bullet icon, title link
- **Link list with detail:** bullet icon, title link, short description under title
- **Thumbnail and link:** small image with title link
- **Profile image and link:** slightly larger image, text description, link below
- **Square bulleted list:** square icon, title link, short description under title
- **Expanding list:** links separated by expandable category name

The developers worked within the constraints of SharePoint to figure out an easy way populate a template with content and use brand-compliant elements without making users write code or create special graphics.

Early on, team members spoke to both relatively new users and users of the company's high-impact sites. Through these discussions they learned the following:

- Content publishers were not developers and would not write code
- Publishing content was only a small part of each publisher's job
- Few had Photoshop or any image editing tools other than Paint
- Few understood how to save or upload images
- Traditional SharePoint training was often too technical, and the organization lacked a great path to train true beginners (though it did offer live drop-in sessions that were quite helpful)

These users told team members that if they wanted this tool to work, it would have to be very easy to use and not require other sophisticated tools or much time to implement.

As a result, today, with no development or design experience needed, publishers can create a brand-compliant list in about five minutes. This saves money on design and development and does not require an agency to build the page. Team members quickly realized that 80% of content was feature graphics (pictures with text), news carousels, fancy call-out quotes, special header designs, or basic text blocks, so they decided to streamline the design of these features into the company's brand template tool. Now, if publishers can insert a web part into a page and crop an image, they can build brand-compliant pages with little effort and zero technical experience.

Understanding Training Needs Through Usability Studies

The brand template tool does require some training, so the team conducted one-on-one usability studies to analyze how people reacted to the tool as they used it. Team members chose a group of users including very experienced content publishers as well as some with little SharePoint experience. Their feedback helped the team decide what kind of support materials would be necessary.

In addition to the template approach, they also added "free zones" where publishers can add custom tables, dashboards, maps, animations, videos, visuals, or other items that couldn't be designed for in advance. Leaving some flexibility helped users embrace the not-so-flexible brand template elements.

More than 2,000 sites now use the brand template, and the company estimates that it has saved millions of dollars in agency resources it no longer needs.

Developing Support Materials

The design team knew that support materials would have to go the extra mile to ensure that users would succeed the first time they used the tool. To achieve this, team members took a two-pronged approach. First, they developed tools inside the tools to help users with common processes. Next, they provided a suite of support materials in place of live training — which would have been ideal, but the team was too small to provide it. The team delayed the launch for two months to develop these tools and support materials so that they would be in place at launch.

Because many of the feature or carousel web parts work only when users add a link to an image, team members knew that users would get lost the minute they had to look for an image. This would be a huge distraction when learning the new system, so the team developed an FPO image library and taught the platform to use it. Users can now borrow FPO images and set up a beautiful page within 30 minutes. Once they were confident editing and saving images to the right library, they could go back and edit the page with new, personal images.

When team members tested the FPO library with a few users, it worked like a charm, so they added a button library. The button styles are based on brand-compliant icons. The intranet team wanted to make sure users didn't get lost in a cumbersome process that required them to go to the corporate brand image hub, find the right approved icon, download it, edit it (with the right tool), save it, and upload. This seemed like a long detour, and the team didn't want users to get lost on this path. With that in mind, it created hundreds of icons in a few colors that were already sized properly for the button styles. It then tested the feature, and users were thrilled.

Support materials include:

- **PDF.** A PDF file that outlines the process to add every available feature with photos. This document is 100 pages, but because it is thorough, visual, and explains all possible problems along the way, it's a lifesaver for publishers.
- **Website.** A website that provides the same information as the PDF, along with key links, image libraries, FAQs, and every available resource for using the tool.
- **Instruction videos.** These videos take the place of live training. They are short, fun, and list all of the corresponding resources mentioned in them.
- **PowerPoint.** The team knew that everyone had access to PowerPoint and most knew how to use it, so it created a PowerPoint file called *Blueprint Planning Tool*. This tool has an example of every element available in the template. Users can drag and drop each element into a blank page to plan the page design. This planning ahead was crucial; the template is easy to use when users have an idea of what they want the page to look like. Using PowerPoint let the team give users a tool they were very comfortable with and, within a few clicks, a user can proclaim, "I want my page to look like this!" The Blueprint file includes brief notes that tell users where each element should go and what each element requires, making the page easier to build.
- **Page examples with notes.** The team also provides a library of page examples, with notes on each one.
- **Yammer group.** A Yammer group lets experts and users help each other out. The team also used the Yammer tool to help track any initial issues after launch.

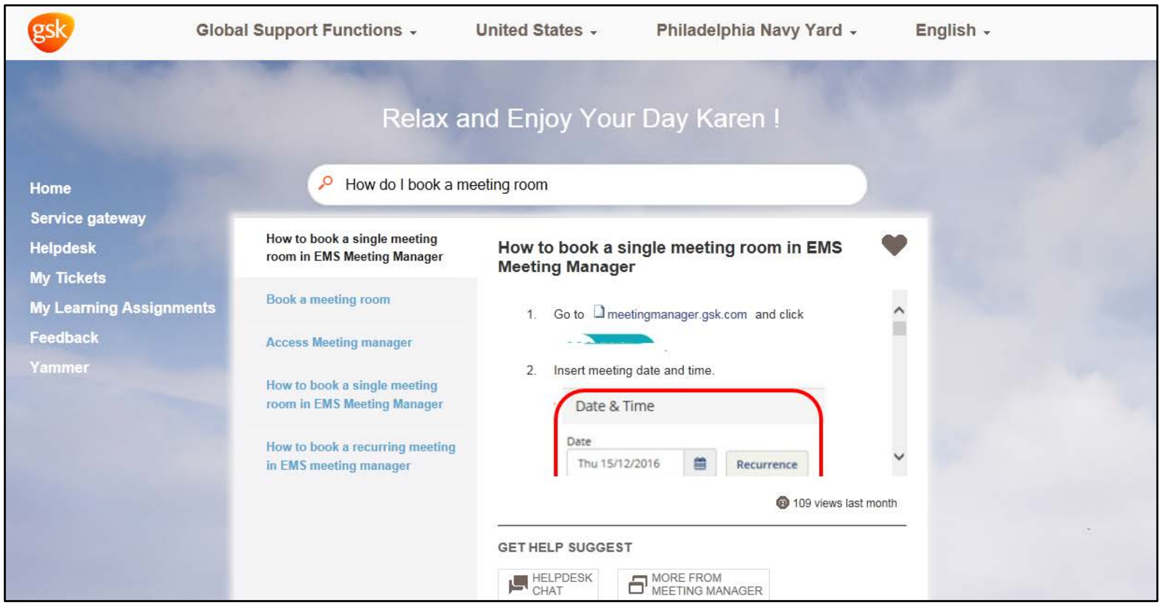


Image 84. GSK Intranet Help Feature. The *Get Help* search component focuses specifically on the tools, services, and documents in the *Service Gateway*. It thus streamlines access to any help or support documentation for those tools. *84_GSK_14_help_desk_search_live.png*

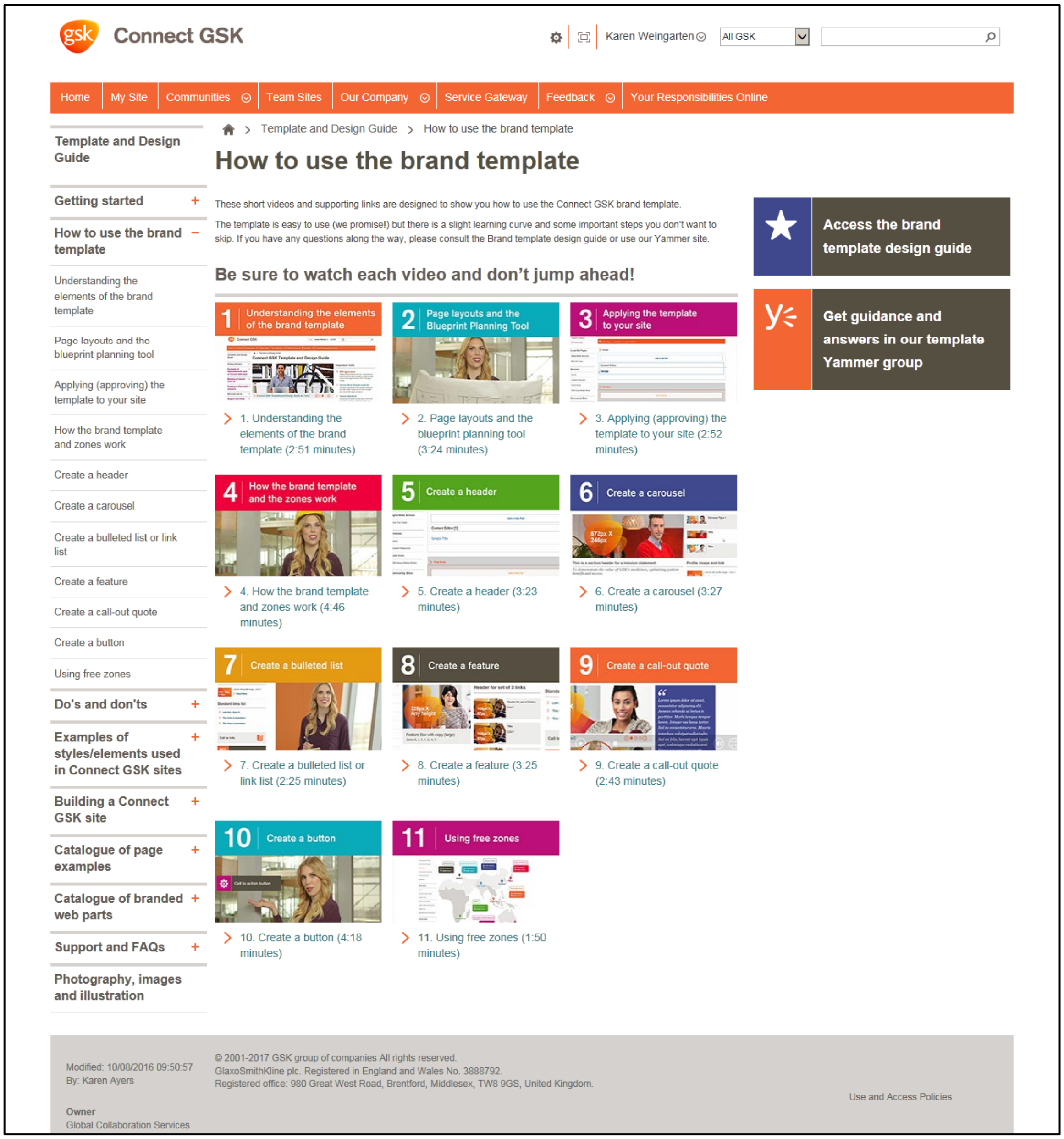


Image 85. GSK Intranet Brand Template Videos Landing Page. This page showcases the video catalogue used to teach publishers how to implement the brand template on their own sites. Each supporting video page links to the tools, assets, and resources needed to accomplish each step. *85_GSK_15_brand-template_videos_live.png*

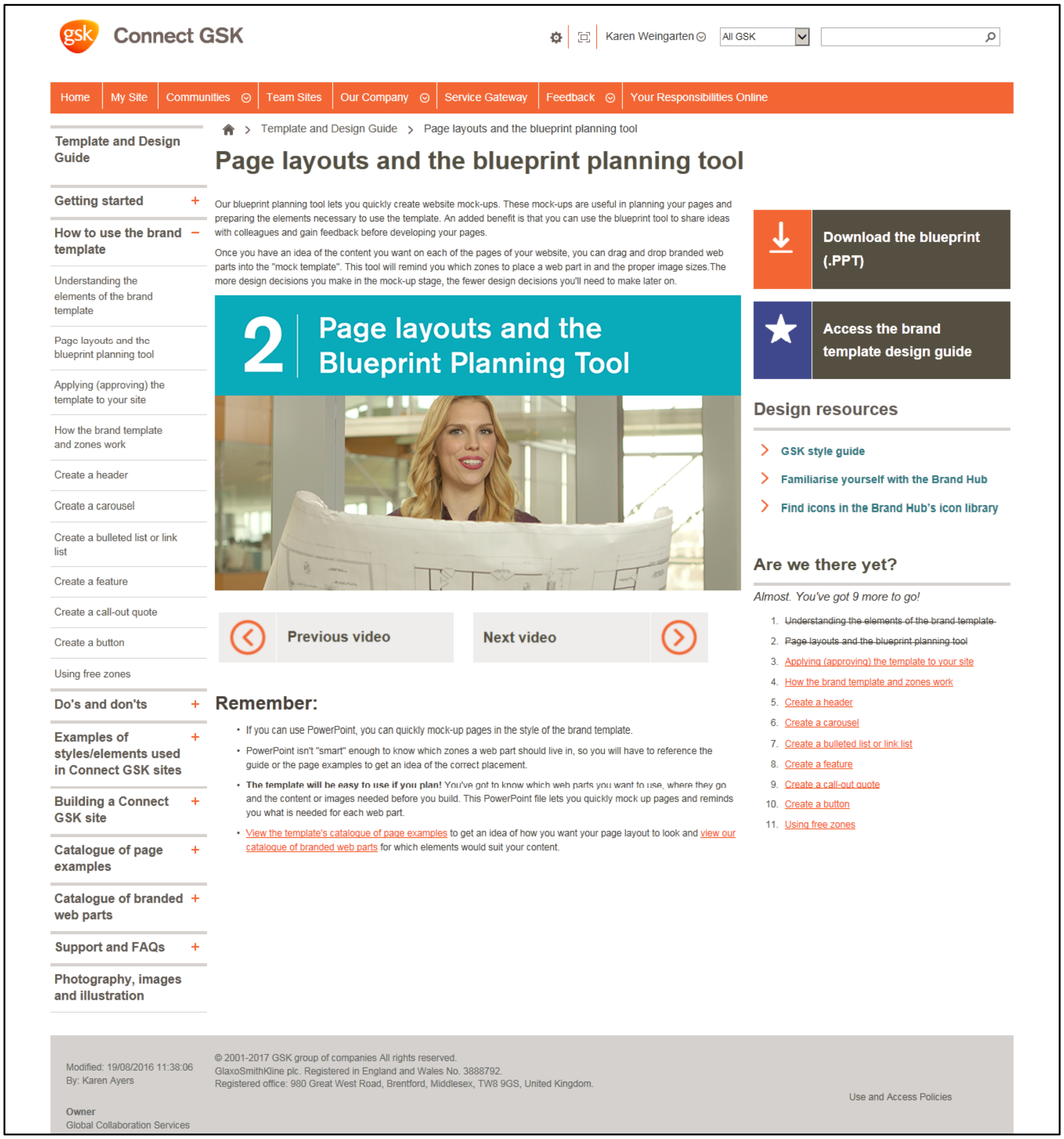


Image 86. GSK Intranet Video Detail Page. Each short, punchy video has all the useful corresponding material listed on the page; the videos make it very easy for users to get started. *86_GSK_16_brand-template_videos_live.png*

OUTSIDE AGENCIES	
Agency	**Project Role**
The Moment	• Design, develop, and consult on key projects including the new homepage design, brand template concept, and Yammer integration • Define, design, test, and develop the brand template and its support materials • Manage day-to-day updates and address platform issues related to content publishing and the brand template • Work with top-level community owners to define, design, and build site content as needed

GOVERNANCE

The company's Digital Operations Board (DOB) makes decisions on operational matters related to the digital channels and associated processes. It does this through discussion and connected decision-making at the DOB meetings; members then bring the resulting insights back into their business areas.

The Board's 2017 focus areas included:

- Establish clear rules and guidance around site and content owner responsibilities
- Support site and content owners in simplifying, aligning, and reducing content
- Improve digital channel projects around email, analytics, mobility, and news delivery
- Lay the groundwork for the next version of our "Digital Employee Experience," which includes the company's intranet, channels, and key systems

Each DOB representative is empowered and well placed to:

- Understand and influence the overall GSK strategy, digital strategy, and broader strategy within business areas
- Understand the current digital channel landscape
- Understand the needs of their own business area audiences
- Influence site and content owners in their business area
- Understand trends in internal and external digital technologies and use that understanding to aid decision making
- Make decisions related to operational matters that impact a specific business area

- Confidently respond to requests for new communities (site collections) in a specific business area and understand the larger impact of adding those sites to the architecture
- Own and refine the architecture (structure) of that business area.

Similarly, the search, *Service Gateway*, and employee support teams host a Global Enabling Services customer board. This board comprises representatives across business functions that own many of the company's services, including HR, IT, Facilities, Finance, and Procurement. The representatives make decisions around how these systems work, develop recommendations around governance, and provide feedback on proposed changes.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Stakeholders	• Make top-level decisions • Serve as primary sponsors from the IT and Communications areas of the business
Global Enabling Services customer board	• Focus on how the *Service Gateway*, search, and employee support teams and systems work • Develop recommendations around governance and provide feedback on proposed changes
Digital Operations Board (DOB)	This group includes representatives from each key business area; typically, they are the key communicators/site owners from the company's top 22 business areas. They include subject matter experts for specific functionality areas such as search, services, digital support, IT, risk, compliance, and records management. Their responsibilities include: • Manage the site structure in each business area, communicating changes and expectations to the site owners and creating site-specific governance rules for each business area. • Manage top-level permissions and access • Relay information to community owners in each business area • Represent the best interests of the people in each business area
Site Owners, Site Administrators	• Align to each business area • Create and maintain distinct sites • Remain current with any technical training or changes to brand guides • Follow records management rules for deleting and updating content • Work with aligned DOB member to provision new sites and manage top-level navigation
Content publishers	• Adhere to records-retention rules, brand guidelines, and GSK narrative

	• Work directly with site owners

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://connect.gsk.com/
Default Status	• The global homepage is the default homepage for most employees. Specific business units, such as Vaccines, R&D, and Consumer, have an exception; their own intranet homepages can be set as a default.
Remote Access	• Most users can connect into the system via remote connection using the company's secure access tools.
Shared Workstations	• Many of the company's factory-based employees do not need a computer for their daily work and have workstations available to check email, participate in training, and access resources, including the intranet.

TIMELINE

PROJECT MILESTONES	
Item	**Status**
~1998	• SmithKlineBeecham WorldLink Intranet
2005–2008	• myGSK intranet in PlumTree
2008	• Migration to SharePoint 2007
~2013	• Upgrade to SharePoint 2010
October 2015	• Upgrade to SharePoint 2013
2017	• Evaluate the entire digital employee engagement experience and plan for the next connected, evolved experience

LESSONS LEARNED

GSK team members share some of their lessons learned:

- **Prepare support tools and create advocates in advance.** “Getting your audience on board before something launches and listening to their concerns and desires is key. Making sure they are confident and have self-service tools can make or break a project.”
- **Don’t over-complicate things.** “A lesson learned from Apple — ask yourself: ‘What else can I take away?’”
- **The intranet may be enormous, but to the user, it should be very small.** “Most users want to accomplish one task at a time, and access only the content relevant to *me*. Don’t cloud it with a map of the universe, just give me access to the three or four things necessary.”

Maple Leaf Foods

OVERVIEW

COMPANY

Maple Leaf Foods is a leading consumer protein company making high-quality, innovative food products sold internationally.

Headquarters: Mississauga, Ontario, Canada

Company locations: Multiple operations across Canada, US, Japan, and South Korea.

Locations where people use the intranet: All sites (offices, operations, and distribution centers)

Annual revenue: $3.3 billion CAD in 2016

THE INTRANET

Users: Approximately 3,400 of the 11,000 employees have access to the intranet through their assigned Office 365 credentials; the rest of the employees are primarily hourly workers who are not assigned individual system identities.

Mobile approach: Responsive web design

Technology platform: SharePoint O365 Online

TEAM

The core team of nine, comprised of UX and developer resources, was complemented with a small executive sponsor group and functional group site owners.

IS User Experience: Stephanie Godin-de Vries, Director UX; Andrew Geddes, Specialist UX; Neelima Chembil Palat, Analyst UX; Radley Dioso, UI/UX Design Consultant; Valentina Dick, Change Lead; Melanie Groves, Sr. Analyst UX; Andrew Chiang, Specialist UX

IS Development: Oleg Grin, Specialist Web Developer; Andy Hao, Specialist Web Developer

Business Site Owners: Jennifer Fernandez, Director Communications; Monique Marozzo, Communications Coordinator; Linda Vickers, Director Compensation & HR Services

Executive Sponsors: Scott Bonikowsky, VP Communications & Public Affairs; Ian Henry, Sr. VP People; Marie-Claude Vezina, VP IS Digital Innovation; Andreas Liris, Chief Information Officer

Also, a combination of consultant design and development resources was engaged for key phases.

INTRANET TEAM

Team members shown here (top row, left to right): Andrew Geddes, Stephanie DeVries, Valentina Dick, and Radley Dioso; (second row, left to right): Neelima Palat, Melanie Groves, Oleg Grin, and Andy Hao; (third row, left to right): Andrew Chiang and Linda Vickers. Missing from photo: Jennifer Fernandez and Monique Marozzo.

HIGHLIGHTS ABOUT THIS WINNER

With a goal of supporting communication, collaboration, and productivity, the Maple Leaf Foods intranet team set out to create a site that would support the company's digital strategy of finding "New Ways of Working," transforming its approach to communication while also having an appealing look and feel.

The new intranet, myMLF, supports approximately 3,000 of the approximately 11,000 people at Maple Leaf Foods; most of the people without access are hourly employees. The site is built on Office 365 and is fully responsive, acting as a digital hub connecting people with the information and tools they need to get things done.

- **Customization.** The team wanted a bold, visually driven design for the site, and it takes pride in the compliments it received for its efforts. Team members wanted an intranet that looked like a website, rather than an intranet. The site is therefore image-heavy to support visual storytelling, with special guidelines given on selecting photos that will not slow the page down. Creating a non-SharePoint-y look and feel was a bit of a challenge, as it required skills that were not available in-house. A designer and developer worked together to determine the right approach for the look and feel.

- **Content.** The organization moved from a structure in which a few people created content centrally to a more open structure that lets employees submit content in a review and approval process. The team assigned ownership for site content and informed content owners about the intranet content strategy. It supports the content team with short "Writing for the Web" videos, guidelines, and access to online training on Microsoft tools. In contrast to the previous site, authors and subject matter experts are now featured on their pieces.
- **Cloud-based.** The move to Office 365 meant that the company could eliminate physical servers and shared drives. Another draw of using Office 365 was that it would be always up-to-date, with no need for update management. Unlike with standard web design, customization within SharePoint's framework was carefully managed to allow these dynamic updates and minimize manual interventions.
- **Yammer integration.** Yammer is integrated throughout the site to encourage social collaboration, engagement, and overall participation. The tool launched with a "30-days of Yammer" campaign intended to increase awareness of, comfort with, and participation in the tool. Another campaign, called "Thumbs Up Thursday," encouraged employees to share praise and recognition through Yammer. Adoption has been slowly and steadily increasing in terms of engagement with content and the variety of employees posting. Yammer is integrated into every article on the site, as well as featured on the homepage.

BACKGROUND

The starting point for the company's most recent redesign was to meet a digital strategy goal of creating a modern workplace that facilitates new ways of working through information storing, sharing, and collaboration. After a successful implementation of Microsoft O365 tools (Office, OneDrive, Outlook, Skype, and Yammer), the use of O365 SharePoint to relaunch the intranet was the next major stage of the company's O365 roadmap.

Goals

The overarching goal of the new Maple Leaf Foods intranet, myMLF, was to provide an integrated, highly featured, leading-edge-designed intranet presence that is both easy to manage and simple to interact with. The new intranet was to be the hub for Maple Leaf Foods and all of its divisions. Marie-Claude Vézina, VP of IS Digital Innovation, summed up the new intranet's goals succinctly when she said, "It needs to be simple, mobile, social, and be the digital hub to connect people with the information and the tools they need to get things done."

To achieve this, the project team needed to:

- Redesign the intranet to be more user-centric and intuitive, provide clearer navigation and standard templates, and improve information-finding
- Simplify site management to support the creation and on-going maintenance of content

- Introduce new online tools for automation and to help track business processes, with the ultimate goal of realizing productivity gains
- Establish governance — that is, standards and policies for the application's use
- Discontinue the use of shared drives for group collaboration purposes

Challenges

The Maple Leaf team faced many significant challenges throughout the project:

- **Content challenges.** From the start, the team knew that much of the old intranet's content was stale and lacked clear ownership; the task of defining and assigning ownership for various content spaces was therefore arduous. At the same time, the team was trying to help site owners and content contributors understand the shift in the company's intranet content strategy. Taking the time to bring the content owners on board with the new approach was critical, because the team needed their active participation. The content needed thoughtful editing, reorganizing, and archiving — and sometimes just deleting — but each such decision required content owners and contributors to participate.
- **SharePoint challenges.** Surprisingly, content was not the most significant challenge the team faced; it struggled daily with the challenge of integrating the design vision with SharePoint limitations on development and functionality.
- **Other challenges:**
  - **Limited usage analytics.** Tracking features had not been activated when the old site was originally launched, so the team had limited usage analytics and thus lacked access to rich data on actual user behavior. As a result, it had to expend more effort interviewing site owners and visitors to ensure the new design aligned to core needs.
  - **Design independent of platform.** The new design plans were created independent of the platform they would be running on: O365 SharePoint Online. Additional design adjustments were constantly being made late in the development phase to adjust for SharePoint factors, so the team paused to conduct a deep-dive review and realign the site owner on the functionality that would be delivered.
  - **Team restructuring.** Mid-project, the team had to restructure to address skill and delivery gaps impacting the critical path. This forced the team to tighten its scope for release timing of sections and features and site functionality.

- **Skill gap.** Having a mobile responsive site required an advanced UI/front-end developer skill set, which was a gap for the in-house development team. As a result, it had to include consultant resources throughout the project until a new recruit could fill this gap.

SharePoint — But Not Cookie Cutter SharePoint

First and foremost, the new MLF intranet stands out because it was custom-built on top of O365 SharePoint Online, yet presents as a consumer-grade website. Companies typically deploy SharePoint sites in an out-of-the-box fashion, but because the Maple Leaf team wanted to go with a bold, visually driven design with extensive storytelling capability, investment in front-end customization efforts was essential. When it came to the design, the team did not want something that would be purely functional and a bore to look at and interact with; it wanted to engage users.

This approach has its plusses and minuses for the Maple Leaf team:

Positives:

- Ability to provide a consumer-grade, intuitive, and modern UI running on the integrated SharePoint platform on the back-end
- Visually impactful content presentation, enabled by SharePoint CSOM (client-side object model) and other UI coding that will require minimal maintenance when future SharePoint changes are rolled out
- Given the front-end coding overlay, the site has an optimal mobile-responsive nature
- SharePoint Online is a component of the Microsoft's Office 365 tools, which are already used extensively across the organization

Negatives:

- Longer development cycle for the initial build to create the master page and multiple template variations; once those resources were established, speed of creation hastened
- Additional developer skill set required for the build, as both front-end/UI developers and SharePoint back-end developers are needed to produce the target results; initially augmented the team with a contractor resource until recruitment completed
- Customizations may require periodic maintenance when Microsoft pushes global SharePoint changes

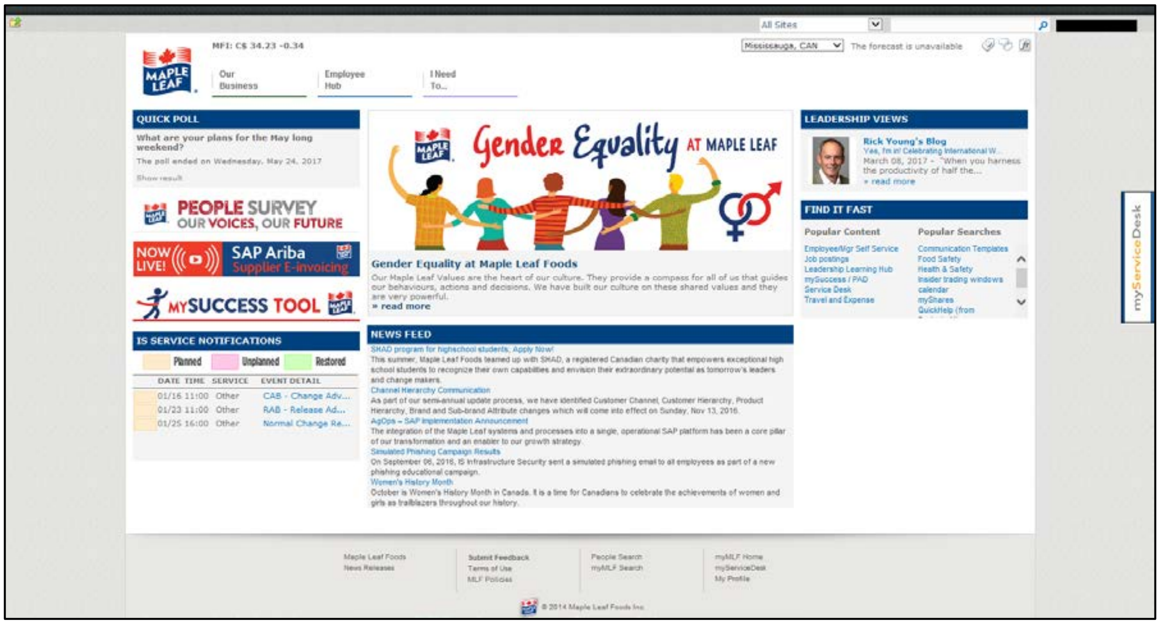


Image 87. Maple Leaf Foods Intranet Old Homepage. This is the unresponsive landing page of the old Maple Leaf Foods intranet. The navigation is a megamenu with a large list of links, some of which were not grouped in any logical order. This page contained outdated content in quick poll, leadership views, newsfeed, and the carousel. The search feature was not functional; the right results would not display when searching a keyword. *87_MapleLeafFoods_01_myMLF_version1.png*

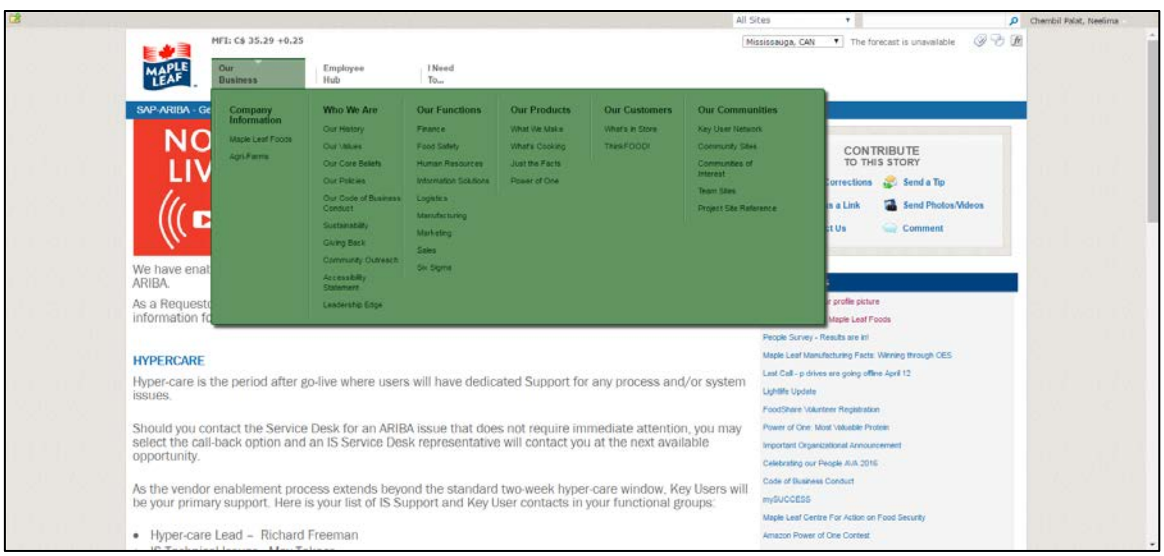


Image 88. Maple Leaf Foods Intranet Old Navigation. The first myMLF's main navigation was a megamenu split into three main categories: *Our Business*, *Employee Hub*, and *I Need To*. Content was very hard to find and illegible under these megamenus, which prevented employees from finding information and getting to their work easily. It was especially difficult for new employees to get to their team sites and find the information they needed because the IA that did not group content in a logical way.
88_MapleLeafFoods_02_myMLF_version1_MainNavigation.png

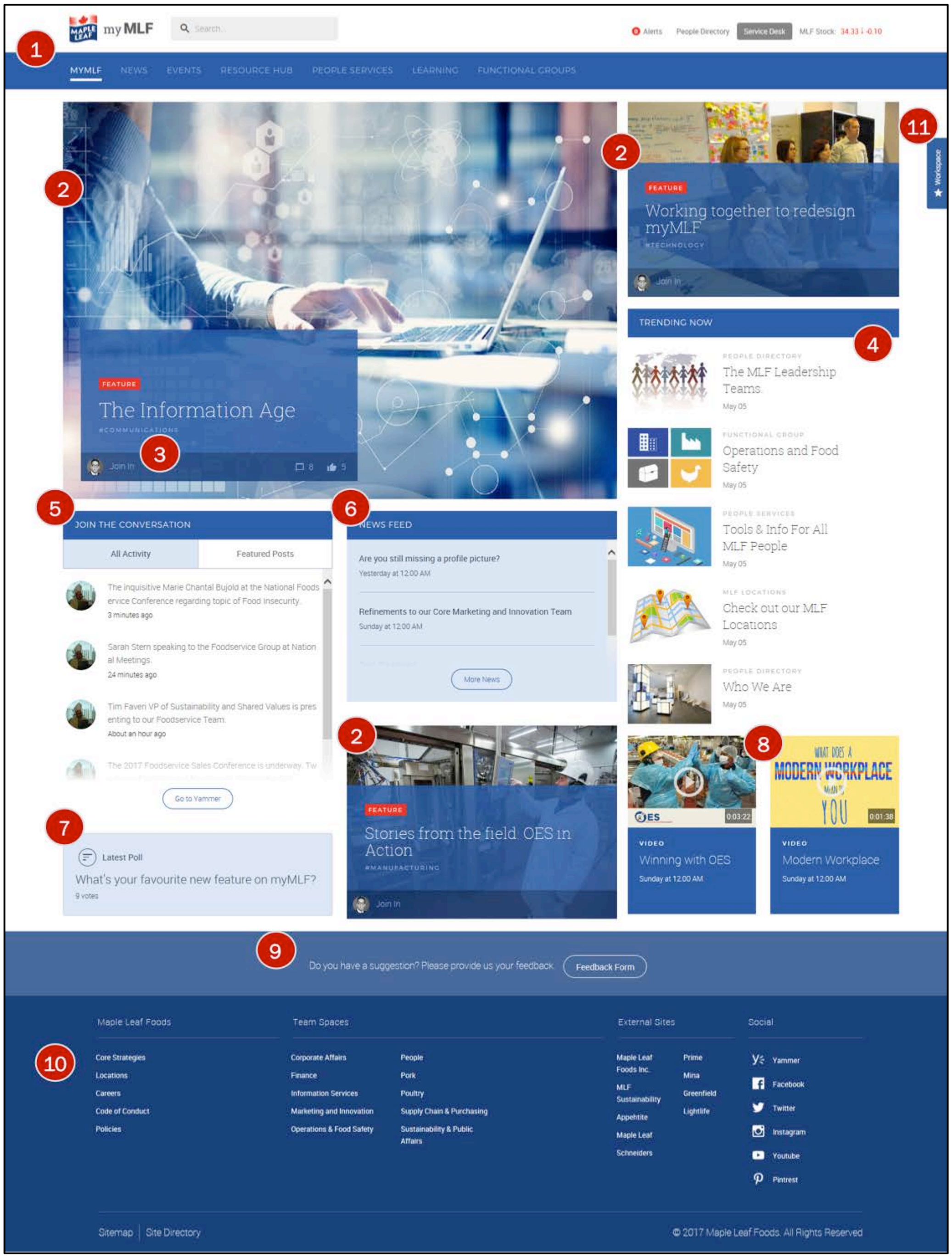


Image 89. Maple Leaf Foods Intranet Homepage. The cleanly designed homepage offers access to feature stories, breaking news, tools, and conversations. *89_MapleLeafFoods_03_myMLF_new_live.png*

Homepage Highlights

1. **Look and feel.** The team wanted the site to look modern and not have a standard intranet feel to it. It used a flat design, colorful and engaging images, and a consistent use of colors to create a very clean design that looks modern and engaging.
2. **News.** One primary feature story is highlighted, with a large image and an overlay that includes the type of story (in this case, a feature story), headline, category of content, and the number of comments and likes the story has received. A secondary story is featured alongside the first and a third appears at the bottom of the page.
3. ***Join In*.** A prompt to *Join In* appears at the bottom of news items, together with the user's picture, to encourage social participation on the site. Clicking the prompt opens a light box where users can like, comment on, or interact with previous comments.
4. ***Trending Now*.** This area features site content that is popular and generating conversation. Each item is listed with an image, category, and the date it was posted.
5. ***Join the Conversation*.** This section showcases a running feed of activity that is based on the individual's group permissions in Yammer. Users can tab between an *All Activity* view and a *Featured Posts* view, and can navigate directly to Yammer by clicking on an item or the *Go To Yammer* button at the bottom. This helps instantly connect employees to the conversations going on around the organization. The *Featured Posts* tool lets users reshare a post within a group to call attention to it. This gives the user community a role in curating worthwhile content.
6. ***News Feed*.** The *News Feed* offers additional content to users, featuring headlines and dates with a link to *More News*.
7. **Quick poll.** The poll feature engages employees by asking them to express opinions and provide feedback. Clicking on the poll opens a lightbox that lets users vote and see results.
8. **Video.** The site features video content, and it highlights two recent videos on the homepage. Videos are shown with a thumbnail image and a *Play* button. The length of the video is shown, along with the title and the date and time it was posted.
9. **Feedback.** As the team was doing research on creating the new site, it saw that employees had a wealth of valuable feedback about the site, its features, and its functions. To encourage this feedback to continue, the team added a *Feedback Form* link at the bottom of the page, together with a prompt to submit suggestions to the team.
10. **Footer.** The page footer provides quick access to key corporate and external resources, such as the *Core Strategies* information about the company's goals for the following year. This information is particularly valuable for new employees trying to understand more about the

company. Other key areas such as *Locations* and *Careers* are listed as well. The footer includes direct access to *Team Spaces* and external sites, and also offers links to the company's presence on various social networks.

11. ***Workspace*. The *Workspace* tab is persistent throughout the site, and provides users with quick access to productivity tools and customized links.

Navigation

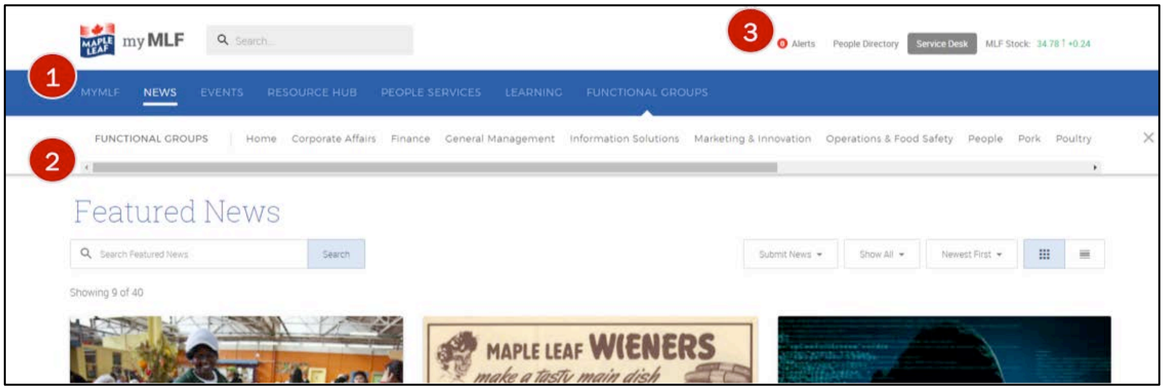


Image 90. Maple Leaf Foods Intranet Navigation. The main site navigation appears in the blue bar at the top of the page, with secondary navigation appearing in a unique scrolling bar beneath it.
90_MapleLeafFoods_04_myMLF_FunctionalGroupNavigation_live-crop.png

Navigation Highlights

1. **Categories.** The site's navigational categories are *MyMLF*, *News*, *Events*, *Resource Hub*, *People Services*, *Learning*, and *Functional Groups*. The users' current location is indicated with an underline in the main site navigation.
2. **Secondary navigation.** In *Functional Groups*, users can navigate via a secondary navigational menu that appears below the *Functional Groups* heading. In this example, the user is in the *News* section, but has clicked on *Functional Groups* to navigate to a new site section. The groups are listed in a white bar beneath the main navigation. In the few cases where the screen is too narrow to fit all of the secondary options, the user can scroll to see additional options, indicated by the scroll bar. The user can also close the secondary menu via the X on the side of it.
3. **Utility navigation.** At the top of the page, a set of utility links provides necessary employee information and support in a consistent, easy-to-locate spot. There, users can access *Alerts*, *People Directory*, and *Service Desk* (via text, email, or phone), and see the current stock price. Site administrators use *Alerts* to send out important messages, such as information about outages or submission deadlines. The number here indicates the number of active alerts. At times, essential alerts appear in a red banner at the top of the page; users can dismiss the banner after reading. Clicking on any alert opens an article page with more information.

Workspace

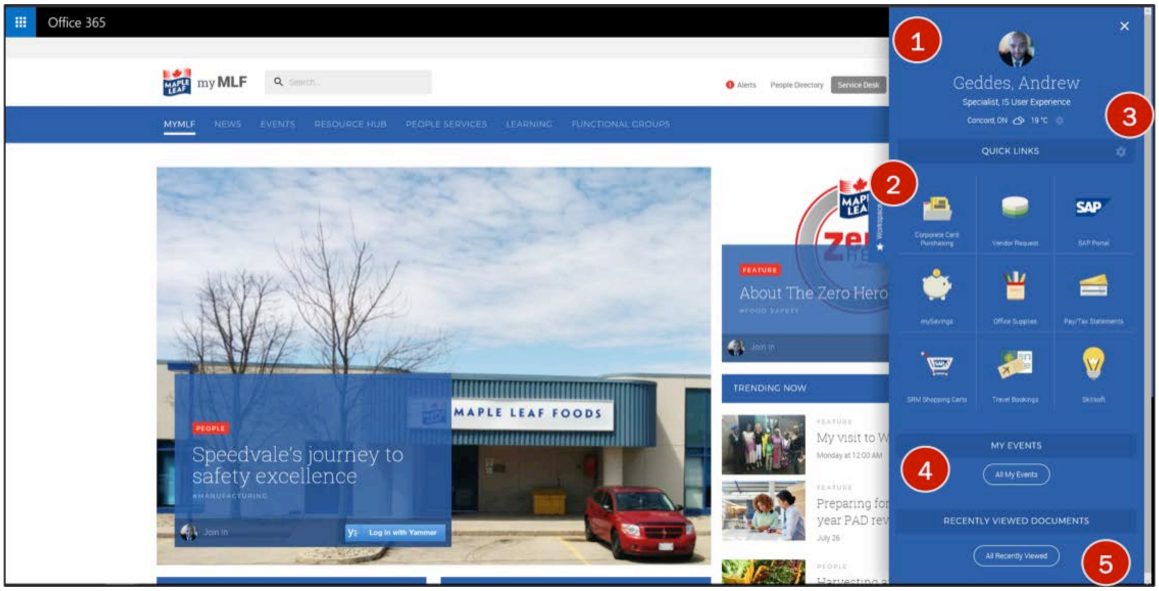


Image 91. Maple Leaf Foods Intranet Workspace. The *Workspace* is available across the site through a persistent tab in the page's right margin. *Workspace* provides quick access to tools and links that employees need for daily work. *91_MapleLeafFoods_05_myMLF_Workspace_live.png*

Workspace Highlights

1. **User details.** The *Workspace* tab opens with the employee's photo, title, location, and weather information at the top.
2. ***Quick Links*.** These links to productivity applications and tools commonly used across the organization include SAP, pay stubs, and travel information.
3. **Customization.** The gear icon next to the weather information lets employees select an office location, which updates the weather forecast accordingly. Users can have 6–12 quick links in their *Workspace* tab, and can customize this list of tools by clicking the gear icon next to the *Quick Links* heading. Doing so opens a light box, where users can search by keyword or choose from a list of 30 popular links. This was a feature that grew out of user research at the beginning of the project. The team found that many employees were bookmarking favorites to keep track of and locate helpful information again, so it built this functionality as a persistently available site feature. Tools accessed through *Quick Links* use single sign-on for users whenever possible.
4. ***My Events*.** Personalized content is listed, showing events the user had registered for. Users can click on the event to see more details, such as location and time.
5. ***Recently Viewed Documents*.** This selection of documents gives users quick access to information they have recently viewed.

Search

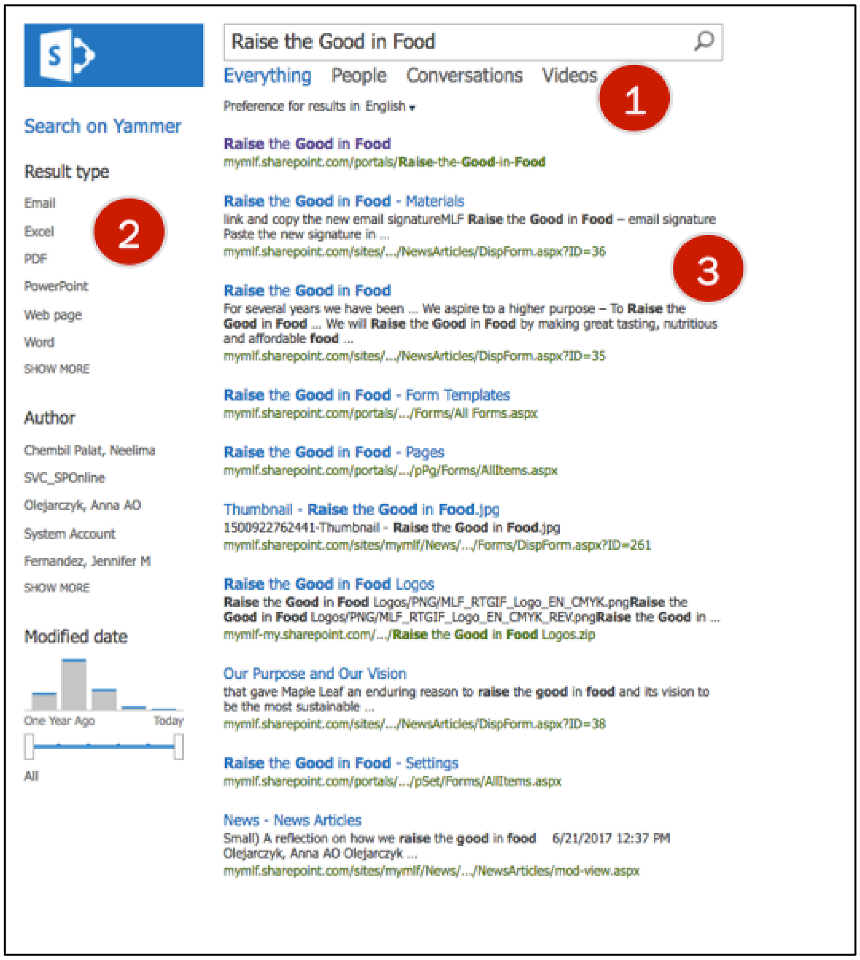


Image 92. Maple Leaf Foods Intranet Search. The search function uses SharePoint Enterprise Search. *92_MapleLeafFoods_06_myMLF_Search_live.png*

Search Highlights

1. **Filtering.** Search results can be refined by *Everything*, *People*, *Conversations* (Yammer), or *Videos*. The search results list everything by default, with the available filters listed at the top of the page.
2. **Narrowing results.** Users can further narrow results via options on the left side of the search results. They can refine by *type*, *author*, or *date*.
3. **Results.** Results include instances of the search query on that page of content. Users can also hover over a result, which opens a properties light box that can include a document preview. Search results are enhanced with the use of best bets and suggested sites.

Mobile

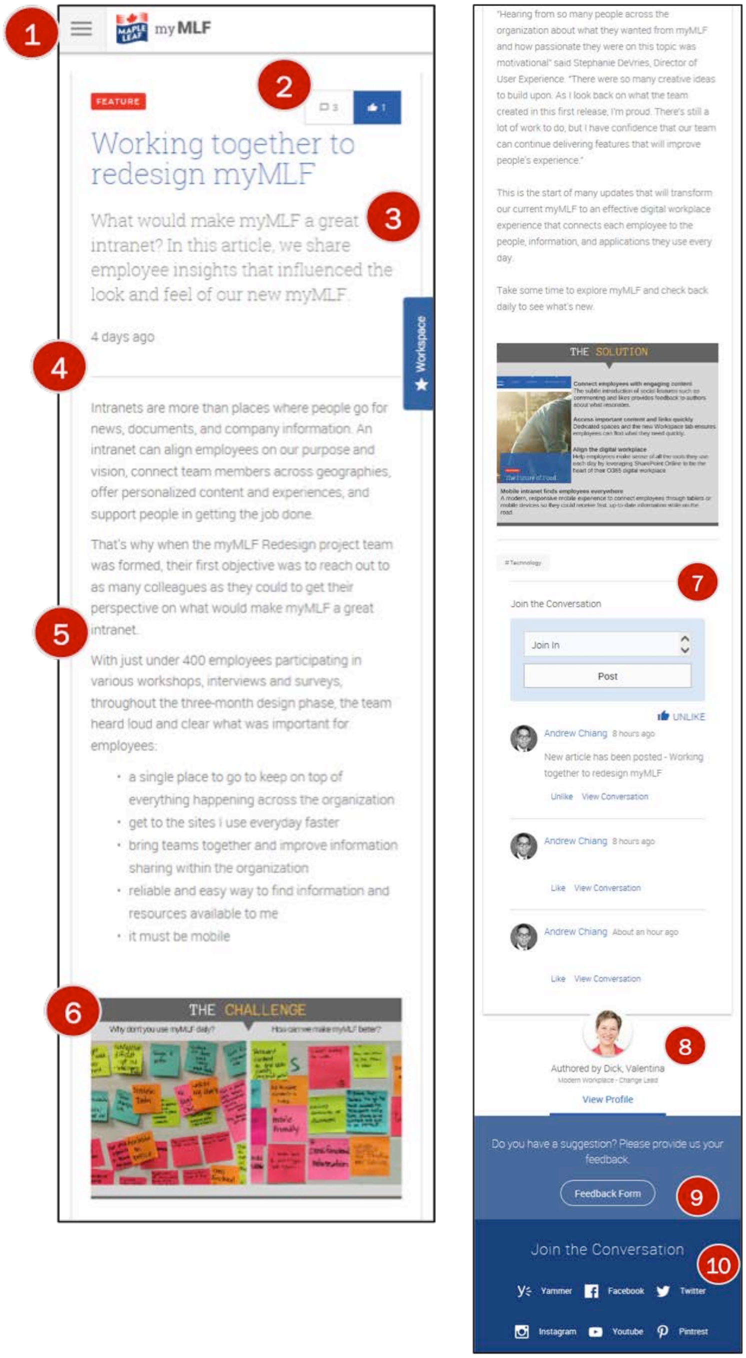


Image 93. Maple Leaf Foods Intranet Mobile View. The fully responsive site works across different device types.
93_MapleLeafFoods_07_myMLF_mobile_NewsArticle_live.png

Mobile Highlights

1. **Hamburger menu.** Navigation is available via the hamburger menu in the upper left corner of the screen.
2. **Comments and likes.** The number of comments and likes on a story appears at the top of the story, making it easy to find on a long, scrolling mobile page.
3. **Headlines and subheads.** Clear headings and subheadings tell users what the page is about.
4. **Dates.** News stories are dated. Recent stories show the number of days ago they were posted, helping users know how recent the information is.
5. **Writing style.** The team focused on creating content that was easy to read online on both large desktops and small mobile screens. Short paragraphs, simple language, and bulleted lists make content easier to scan.
6. **Graphics.** Graphics and images can be added to news stories.
7. **Commenting.** Stories allow commenting and liking so employees can interact with site content.
8. **Author.** Author information appears at the bottom of the page, together with a picture of the author and his or her title. Users can click through to view the author's profile.
9. **Feedback.** Each page includes a link to a feedback form at the bottom, asking users for suggestions.
10. **Social.** Links to internal and external social sites are listed at the bottom of the page.

Submit Article

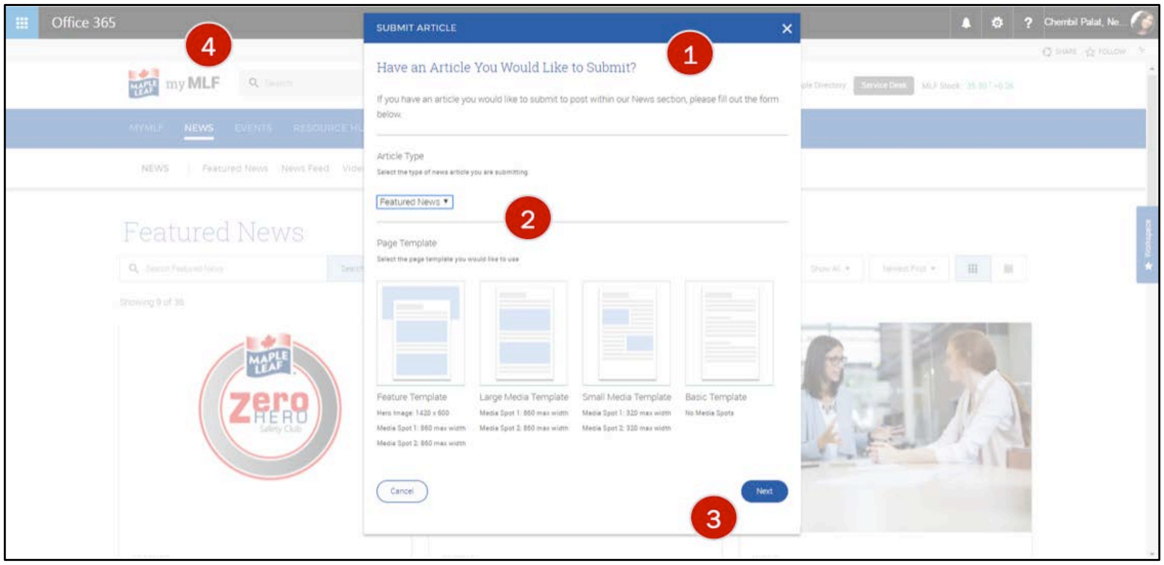


Image 94. Maple Leaf Foods Intranet Submit Article. The previous intranet did not let employees post content. The new site lets users submit news stories for review by the Communications Team.
94_MapleLeafFoods_08_News_SubmitFormPg1_live.png

Submit Article Highlights

1. **User-generated content.** For the first time, employees can submit news stories for review and inclusion on the site via a site form.
2. **Process.** Users can select a type of news and template, then add content and relevant media (such as photos or video), and tag the content before submitting.
3. **Templates.** The site offers a variety of templates to fit different news styles and needs. Each template is shown in a small mock up to give users a quick example of what each includes.
4. **Desktop only.** The team decided to offer the option to submit content only on the site's desktop view, after deciding that mobile users were unlikely to go through the submission process on a small screen and a small keyboard.

DESIGN PROCESS AND USABILITY WORK

Approach

Many years had passed since the intranet had undergone any substantial changes, and challenges included finding content, inconsistent and infrequent content postings, and the growing adoption of O365 tools such as OneDrive. There was also considerable interest in providing input into the redesign. As a result, redesign was a team job, and that team incorporated a variety of perspectives to strengthen its output. Principles from both classic design and human factors were brought together to build out the recommendations.

The main activities in the company's redesign approach included the following:

- **Conduct external research to determine best-in-class intranet practices, including:**
    - Study Nielsen Norman Group's *Intranet Design Annual 2016*
    - Attend Ragan Communications' Intranet Best Practices Seminar in New York, as well as various webinars
- **Assess the current state of intranet functionality and content**
    - **Map all elements of the current landing page** (from-to mapping)
    - **Inventory current state of sites**; identify site owners and identify content to be archived
    - **Assess content** to determine content for migration
    - **Assess service desk call logs** over the past year and speak with support resources to understand the nature of SharePoint-related incidents and support tickets to reduce the administrative burden and better manage content
    - **Survey existing site owners** to associate the active sites with a functional group to organize resource links; with 200+ sites, it took persistency to group the sites, confirm site owners, and assign ownership where it had lapsed.
- **Design Build:**
    - **Review user persona interview findings** previously conducted with 50+ employees

- **Conduct a series of three one-day thinking workshops** with a cross section of employees from various levels and functional groups to generate concept ideas and overall needs based on a previously vetted problem statement. The actual outputs from initial sessions, however, were either too high-level, which did not help the team identify specific design elements to suit needs, or too narrowly focused on specific feature details; neither output was much benefit in driving a conclusive direction for the site's composition or features. When additional co-create activities were added to the workshop agenda, the team began obtaining more insights into what people wanted in terms of organization and interactions. The sessions were lively, and people left positively anticipating the new site's release.
- **Conduct interviews** with site owners to understand their site objectives and how these fit into the proposed design
- **Conduct card-sorting** exercise via an open online survey extended to everyone with intranet access. These results helped the team understand how people logically organized the individual components into subgroups and the language they would use to name a category.
- **Co-create workshops** with site owners to determine site components, functionality, and prioritization
- **Conduct site usability testing** with individual users by sharing high-fidelity InVision mock-ups to validate design prior to build activities. Creating wireframes and high-fidelity mock-ups were invaluable in helping the design team gain sign-off on design requirements and usability testing to validate the proposed design. Usability testing focused on site visitors' ability to navigate the landing page to ensure quick discovery of topics of interest.

* **Development Build (sprints):**
    - Initial release of the landing page, including some interim pages with links to content on old sites until migration activities are complete
    - Order of development priority is typically the landing space and the major web parts supporting content creation; this lets site owners/content contributors familiarize themselves with the new process and begin content loading activities as early as possible.

Information Architecture

A common complaint with the old intranet was that content was poorly organized and hard to find. With more navigation areas and cleaner categories, the new intranet's content is closer to the surface and accessible through several navigation tools:

- Utility navigation
- Main navigation (two layers)
- Workspace tab
- Footer navigation

Maintaining these navigation areas in the master page lets site visitors dig deep into one category or jump quickly to another. A clean subnavigation overlay ensures that menu options are easy to read and select. Once mobile views are engaged, navigation switches to the hamburger-style access point to optimize presentation space for content.

In those few areas where the number of options within a category did not present on one line, a sideways scrolling technique was applied.

Throughout the design process, the team sought a balance between finding unique heading descriptions and using terminology shared by site users. Some compromises were made to adopt simple, everyday terminology that resonated with users. Feedback on this simplicity and familiarity of everyday terminology has been positive.

Establishing IA is not a quick exercise, and it is a major success factor for users' ability to reach their desired content. This team found it helpful to seek as much input as possible from actual users, as well as to have someone accountable for selecting the final details. It was also helpful to try separating people from what they currently had so that they could think more broadly about what they needed or could use.

Adoption and Buy-in

Converting to SharePoint Online had been identified as one of the stages of the release roadmap for Office 365 tools, so the redesign effort had good visibility overall. The old intranet was rather dated and difficult to manage, so integrating it with a new design was a natural fit for the company at this point in time. Both the current site owners and Information Solutions were prepared to engage in the myMLF redesign project.

While adoption is never guaranteed, the Maple Leaf team found that having a user-centric design and mobile accessibility were two big benefits that drew people's attention to the intranet.

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
IBM Canada, Interactive Experience & Global Business Services	• Conduct external research and use best practices to create the design recommendation for the new myMLF intranet • Augment development and unit testing services with the off-shore development scrum team that provided the packages to be integrated

GOVERNANCE

The UX team within the Information Solutions (IS) function is accountable for the O365 SharePoint Online application. It facilitates business requirements gathering and sets development priorities.

The Communications & Public Affairs team is accountable for the overall design and content of the intranet landing page. Subsite management is delegated to the respective functional groups or topic specialists, while Communications & Public Affairs provides guidelines, coaching, and support to the various groups creating myMLF content.

Given the degree of change that goes along with a new intranet's release, the team has instituted more frequent regular touch points between the two groups so they can be more responsive to issues or needs as they arise. Having a small group of people accountable for landing page decisions is beneficial, since it is the launching point to areas that other functional groups manage; however, stakeholder management is also important to ensure that everyone's needs are met while maintaining consistency across the intranet.

Because Communications & Public Affairs focuses on driving content needs, the IS team is free to focus on delivering features and functionality that will continue to build the intranet's value.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
IS User Experience	• Software application owner; ensure system runs optimally • Establish O365 SharePoint Online governance and standards • Provide training resources for O365 SharePoint Online • Gather business requirements and design solutions, including permissions structure • Manage feature release schedule • Coach site administrators
IS Web Developers	• Establish guidelines and standards for the intranet development approach; customize selectively to ensure a robust solution • Conduct build and test activities for release • Handle ongoing technical support requests
Sponsor Team	• Make executive decisions and oversee scope and quality
Site Administrators	• Approve site design and feature enablement • Manage site permissions • Create and/or approve site content • Communicate with and train site-specific content creators • Maintain third-party connections to their sites • Ensure knowledge transfer during site admin transitions
Content Contributors	• Create site content in alignment with standards • Maintain site content

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://mymlf.sharepoint.com/sites/mymlf
Default Status	• myMLF is programmed as the default homepage on the standard browsers (IE and Edge); users cannot change this setting.
Remote Access	• The site can be accessed from any internet browser by the URL; as for any Office 365 tools, users must enter their O365 organizational account authorization. • People on the go now have convenient access to the intranet from their mobile phones/tablets and can stay on top of news and events through a responsive content presentation. • Field sales reps spend most of their days on the road visiting customer store locations; they work primarily on iPads. Remote access has made it possible for them to access the intranet from their tablets with a WI-FI connection rather than having to launch the site from a VPN connection from a corporate laptop when not in the office.

TIMELINE

PROJECT MILESTONES	
Item	**Status**
Unknown Launch Date	• Company intranet runs on OpenText for a significant time period before and after Oracle acquisition
Early 2011	• Major intranet build: SharePoint 2010 platform • Company's collaboration platform becomes SharePoint
Early 2014	• Upgrade/migration of non-intranet sites to SharePoint 2013
Mid-2014	• Major landing page redesign in SharePoint 2010
July 2015	• Launch of Yammer, MLF's corporate social tool
July 2015	• Limited release of SharePoint Online for specific use cases
September 2016	• Freeze of legacy intranet for SharePoint Online Project
October 2016–May 2017	• Redesign of myMLF SharePoint Online
May 2017	• Launch of the new design O365 SharePoint Online
Overall redesign timeframe: 8 months (October 2016–May 2017)	

CONTENT AND CONTENT CONTRIBUTORS

Following is a breakdown of how the Maple Leaf staff handles each component of content management.

Contribution

The company's newly launched intranet helps the organization share key news and information in a dynamic, timely, and relevant way, while also enabling information sharing and workflows on a level previously unavailable.

The intranet editorial committee is led by Communications & Public Affairs and comprised of volunteers from various functional groups. This committee will discuss and plan upcoming feature topics to ensure that a robust content pipeline flows from a variety of sources. The intranet team is also taking strategic steps to ensure that content contributions come from a wider variety of sources than in the past. These steps include:

- **Convert broadcast email to intranet content.** Broadcast emails are prime conversion targets, so the intranet team is reaching out to these authors to see how their content can be leveraged to become more robust and searchable as part of the intranet, rather than having messages lost in the abyss of people's inboxes or recycle bins.
- **Open news posting to the entire organization.** To increase accessibility of posting content, the news features on the main landing page are designed so that anyone in the organization can submit a piece. The draft is viewable only to the creator and site administrators until it is approved for publication. The posting process incorporates the option of manually selecting the author or subject matter expert associated with the content. This handy feature means that, if needed, authors can delegate the task of submitting an article.

Contributors

- **Site owners — new sections.** Identifying site owners is done in the early planning stages for each release of a new intranet section. Ideally, at least two people are assigned as site owners to minimize the disruption should an individual not being available or transition to another role. Site owner responsibilities are typically a small portion of the individual's job function. In most cases, this is a delegated assignment.
- **Site owners — landing page.** For the intranet landing page, the Communications & Public Affairs team (three people) act as site owners. The team is accountable for approving all content published to the main page.
- **Site owners — *People Services*.** Because the intranet conveys company culture and fosters employee engagement, HR is involved in content management and owns the content in the highly requested *People Services* subsites.

Training

The *Resource Hub* contains a document collection that contributors can reference at any time. The team recommends that those new to contributing intranet content watch short videos or review the instructional guides before securing additional coaching on their specific contribution. These comprehensive guides cover the following:

- **How to Post on myMLF.** This user guide covers the basic posting steps.
- **Word document templates for news.** These templates let contributors draft their materials in a way that will be easy to copy and paste when they choose to upload them.
- **Graphic job aid.** This guide offers the technical details for posting images, along with watch-outs and suggested free resources to secure or format images.

- **Writing for the web checklist.** This helps authors get ready to post items to myMLF.
- **Writing for the web FAQs.** These further explain how to write based on feedback from users.
- **Writing for the web videos.** These three short videos (less than seven minutes long each) show the whys and hows of posting news on the intranet:
    - **"It's Different":** Basic style change implications, including mobile.
    - **"Newsworthy Content":** How to create connections between the message, the audience, and the vehicle.
    - **"How to Post News":** a visual guide to the posting process.

In addition to custom materials built for the intranet, people can access self-directed online learning through BrainStorm QuickHelp (www.quickhelp.com). On this site, users can view short instructional videos, watch webinars, or read step-by-step instructional quick start guides on a variety of Microsoft tools, including SharePoint Online and Yammer.

Content Management

The Communications & Public Affairs team is responsible for managing the landing page content, but any site owner or functional group on the IS team can take the opportunity to educate users on the process and provide support resources.

Quality

- **Publishing queue with review.** Publishing news articles is an open process on the new intranet, and content integrity is maintained through an online publishing process. Once the online submission has been marked for review, site administrators are notified by email. Once they review the article, they can make changes directly or contact the author to request that they make the required changes.
- **Content expiration.** If a new article is not set to be published at the time a live article is set to expire the system will continue to extend the last published piece, by default, so that there are no errors on the landing page.
- **Proper graphics.** The use of proper graphic images is critical, as large file sizes can affect page load times and incorrect dimensions may negatively alter the page layout, such as creating a tile view that is not uniform. The team can also check how the article with images will appear prior to publishing. This lets them modify it if needed. However, the team has found that spending time educating users on the appropriate use of graphics and correct sizing is a better approach. Also, developing a job aid for users that provides the technical details of image use is a must.

- **Built-in feedback mechanisms.** The master page design ensures that site users can provide feedback from any intranet page. Their messages are added to a SharePoint list, which site administrators subscribe to for email alerts. The site administrator reviews all messages and takes appropriate action.
- **Yammer integration.** Yammer integration within each article gives site visitors an unrestricted option to directly share their opinion and feedback on posted content. Others can like or comment on these messages.

CONTENT GUIDELINES EXAMPLE

Writing for the Web: Video Series Checklist

Use this checklist to validate your written and visual content for myMLF or your team's intranet page before you publish:

Readability

- ✓ *Content can be scanned in F-pattern (web view)*
- ✓ *Content can be scanned in sideways mountain (mobile view)*

Content

- ✓ *Words are simple*
- ✓ *Words are few*
- ✓ *Sentences are few*
- ✓ *Important content is covered first, inverted pyramid*
- ✓ *Message has a call to action that is clear for your audience*
- ✓ *Content has been proofread and approvals (as necessary) have been obtained*

Visuals

- ✓ *Bulleted list contains 7 or less bullets*
- ✓ *Hyperlinked items tell where the hyperlink takes you, not vague 'click here'*
- ✓ *Images are clear and relevant and within size specifications*
- ✓ *Videos are relevant and short*
- ✓ *White space balances the words*
- ✓ *Bold and italics are used for emphasis (sparingly)*

Culling Content

Throughout the migration process, site owners were encouraged to create new content rather than import old/stale content. The team discovered, however, that people innately want to retain access to content during transition periods, even as the new content is launched; giving them this access helped increase their willingness to purge.

Site owners are asked to conduct annual inspections of their site to ensure the content quality is relevant, accurate, and up-to-date.

Data lifecycle was a key element that team members discussed when they outlined the new site's requirements, so they made accommodations for presenting content in a succinct but comprehensive way. For example, lists are presented with a select number of items, along with the option to select "view more." List content is typically presented for up to one year.

Image 95. Maple Leaf Foods Intranet Who We Are Page. The *Who We Are* page, under the *People Directory*, is the redesigned version of the old *Our History* page. It displays an infographic outlining myMLF's different business areas, the departments and teams that fall under each area, and how they work together, giving employees a better understanding of how MLF functions. *95_MapleLeafFoods_09_PeopleDirectory_WhoWeAre_live.png*

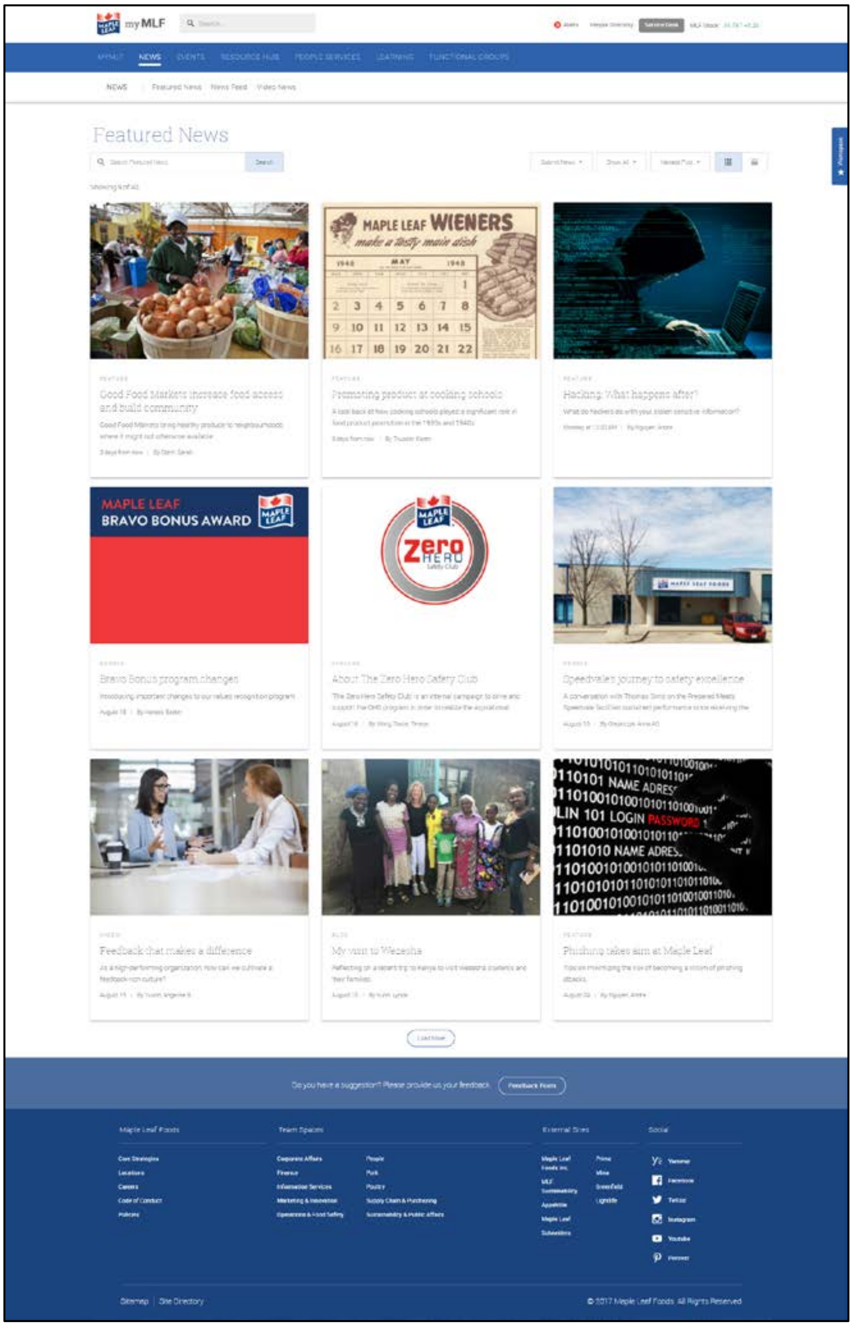


Image 96. Maple Leaf Foods Intranet Featured News Homepage. The *Featured News* homepage (desktop view) lists all the featured stories MLF has published to date in tile view. Like the *Newsfeed Landing* page, each tile displays the article title, category, author, and date, and users can filter articles by date. This page draws attention to the most important stories the company has published, allowing employees to celebrate its successes and stay informed of any important changes.
96_MapleLeafFoods_10_FeaturedNews_TileView_live.png

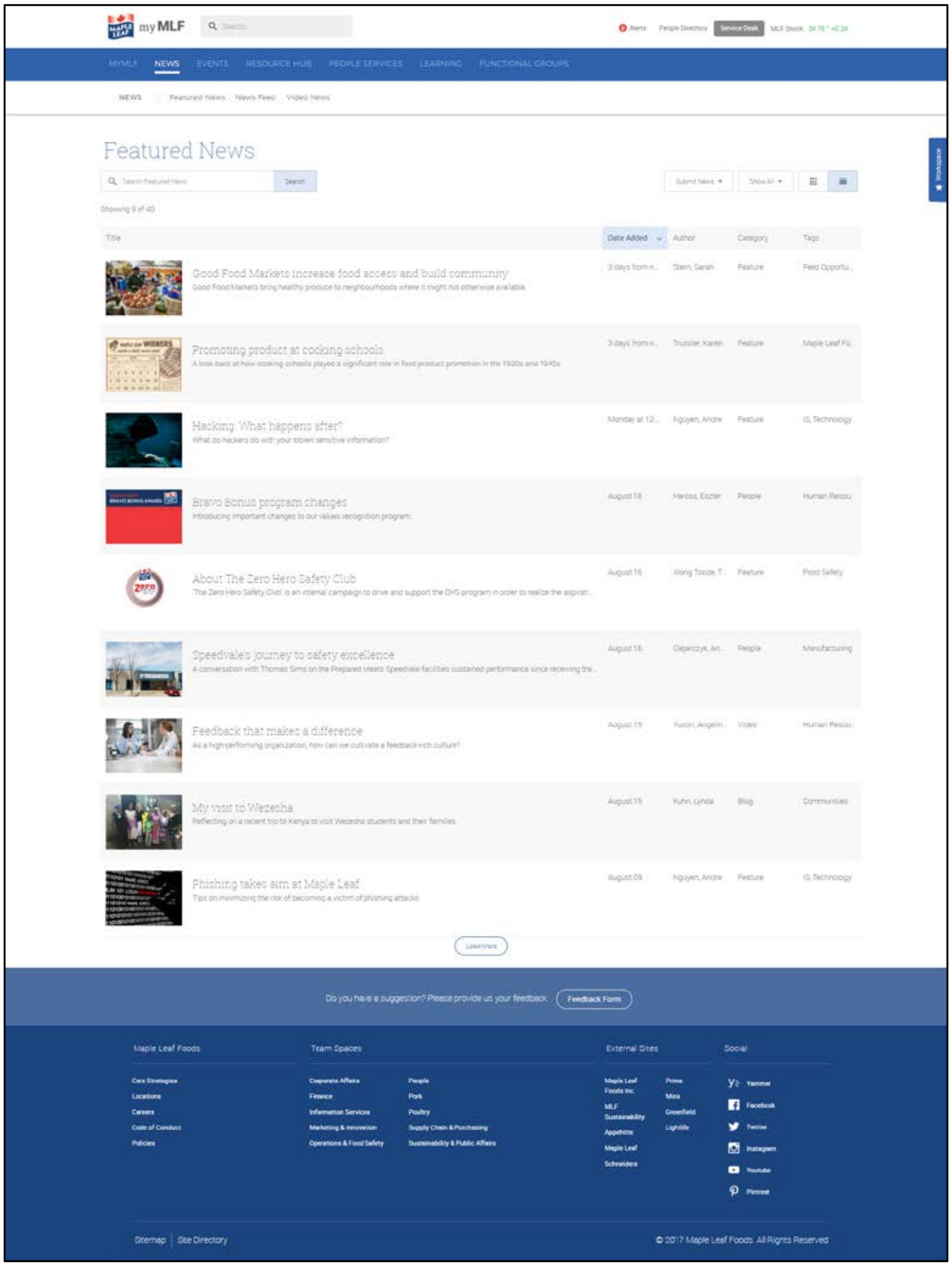


Image 97. Maple Leaf Foods Intranet Featured News Homepage List View. This is the *Featured News* homepage in list view, which shows additional metadata (under the *Tags* column) that employees can use to filter articles. Employees can also submit their own articles to be reviewed and published using the *Submit News* button above the list.
97_MapleLeafFoods_11_FeaturedNews_ListView_live.png

Image 98. Maple Leaf Foods Intranet Featured News Article.
The *Featured News* article is one of five article templates made to showcase the most important stories MLF wants to tell. Using Yammer social features, employees can like or comment on the article. If employees need to know more, they can always contact the author of the article by clicking *View Profile* on the right side of the article. Every article is tagged under a specific category (seen above the title) to make it easier to find.
*98*_MapleLeafFoods_12_FeaturedNewsArticle_live.png

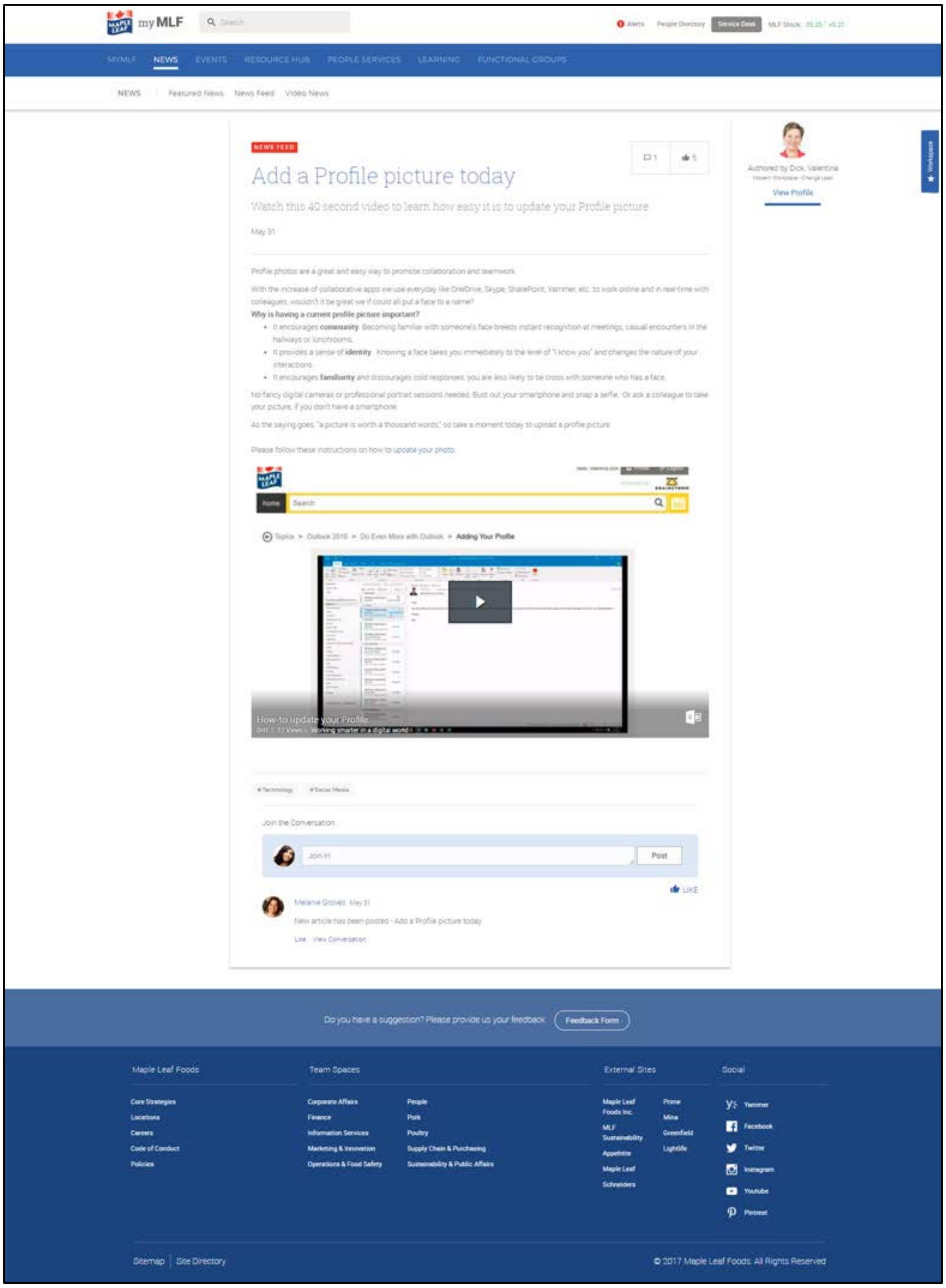


Image 99. Maple Leaf Foods Intranet Video News Article. The *Video News* article is one of the five templates made to publish video content. In this example text is organized and formatted so employees can easily read information relevant to changing their profile picture before they watch the tutorial. *99_MapleLeafFoods_13_VideoNewsArticle_live.png*

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• O365 SharePoint Online
Bug Tracking/Quality Assurance	• Visual Studio Team Server
Design Tools	• InVision, Photoshop, Sketch
Site Building Tools	• SharePoint Designer • Visual Studio Team Server (coding & deploying)
Content Management Tools	• O365 SharePoint Online • Visual Studio Team Server (code & functionality repository)
Search	• O365 SharePoint Online Search Center
Other Functions	• Optimal Sort Survey Tool (card sorting)

Mobile

By building the new myMLF in SharePoint Online, Maple Leaf has given its users the ability to access the site and its resources from anywhere without the need for VPN. To view myMLF, users simply log in to their Office 365 accounts. Knowing users would not be tied to their laptops when accessing the site, myMLF was built to be responsive. On day one, the new intranet was easily accessible from smart phones and tablets, giving Maple Leaf employees the freedom to do their work anywhere with an internet connection.

The mobile view is essentially the same as the desktop version of myMLF, with navigation elements changing to a hamburger menu and other elements repositioning for the mobile view. The option to submit news was removed given the task's complexity and impracticality over a mobile device.

The mobile design was optimized for standard browsers (Internet Explorer 11 and Edge), with additional testing conducted on popular browsers such as Chrome and Safari. iOS was the next priority given the use of corporate-owned iPads by groups in sales and operations, coupled with the general popularity of iPhones. The latest Android OS was the final testing platform.

Image 100. Maple Leaf Foods Intranet Mobile Homepage. This is the myMLF intranet's mobile landing page. This scrollable, fully responsive page gives employees easy access to their work and company-wide communications on any mobile device while they are on the go. Many MLF employees and teams use tablets to access their work and important communications and, for the first time, myMLF is fully responsive, which lets these employees stay connected and get to their work faster on any device. *100_MapleLeafFoods_14_myMLF_mobile_live.png*

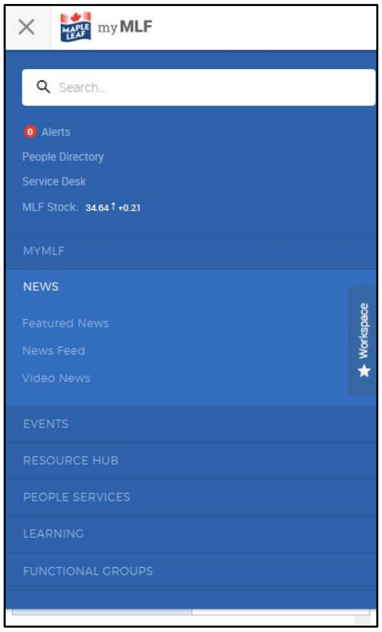


Image 101. Maple Leaf Foods Intranet Mobile Navigation. This is the main navigation on the mobile landing page, accessed by clicking the hamburger symbol on the top left of the screen. The menu reveals a search bar that employees can use to find content on the intranet; as they scroll down and click on each category, it expands to reveal the subpages. *101_MapleLeafFoods_15_myMLF_mobile_menu_live.png*

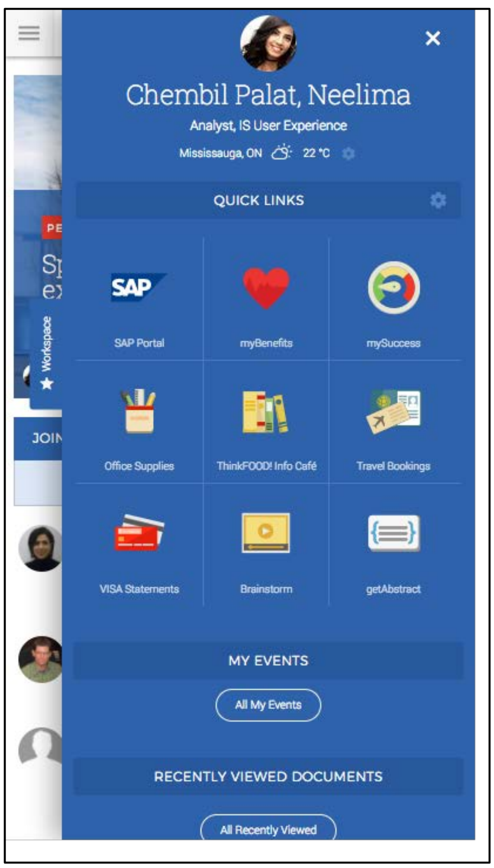


Image 102. Maple Leaf Foods Workspace Tab Mobile View. Clicking on the *Workspace* tab on the right side of the mobile screen lets employees get to their favorite and frequently used tools and content. It also offers quick access to upcoming events they've registered for. This tab exists everywhere across the intranet so employees can access their work with one click. *102_MapleLeafFoods_16_myMLF_mobile_workspace_live.png*

Yammer

Yammer engagement is notable on the Maple Leaf intranet. As of July 2017, total Yammer membership had reached 1,863, with monthly engagement averaging 515–729 users over the previous six months. On average, 2,000 messages were posted per month across the 163 groups.

Because the Yammer O365 tool had been in widespread use across the organization for more than two years and integrates with SharePoint, it was the default choice to create a stronger social presence within the intranet. When Yammer was initially launched, the organization held a "30-days of Yammer" campaign to raise awareness and increase user comfort with the tool. The sales teams are heavy users, having incorporated it into their daily call-cycle processes so they can collaborate with peers across the country.

Yammer is integrated into the intranet landing page to encourage two-way dialogue about intranet content. Each feature news article web part presents with a *Join the Conversation* banner displaying the number of comments and likes for the article. Clicking anywhere on this banner triggers a pop-up light box that lets viewers like, comment on, or interact with someone else's reply to the article.

Join the Conversation also shows a running feed of Yammer posting activity, based on the individual's group permissions. *Featured Posts* lets users reshare a post within this group to bring attention to the discussed topic.

In the first two months after the intranet launched, there was some like/comment activity on each article, but numbers were relatively low. Engagement and the variety of people engaging have been increasing weekly, however, as new and varied content is published. Users typically comment on and share personal experiences with the subject, provide praise, or ask clarifying questions.

Some of the popular and beneficial ways Yammer is leveraged at Maple Leaf Foods include:

- Snap a picture and share
- Ask questions to a peer group (Excel is one of the most popular groups; people voluntarily provide tips or help those in need with coaching/troubleshooting support)
- Praise and recognition (including the "Thumbs Up Thursday" campaign)
- A dynamic FAQ, which is visible to others who may not have thought to ask a particular question
- Quick and informal sharing of information and resources, which is easy to add through a link to an external or internal source

A Yammer 101 group provides orientation on using Yammer for new members or those who would like a refresher.

The Maple Leaf team has a word of caution regarding Yammer set-up and use: limit the number of Yammer callbacks to minimize the risk of users locking themselves out of the system, which results in an incorrect display of comment/like counts and temporarily suspends interactivity. MLF's initial intranet design had Yammer integration on all three feature and two video news zones on the landing page, but after performance testing the team decided to restrict Yammer to feature news only. The other news zones have the Yammer integration embedded within the specific article template, but not on the landing page.

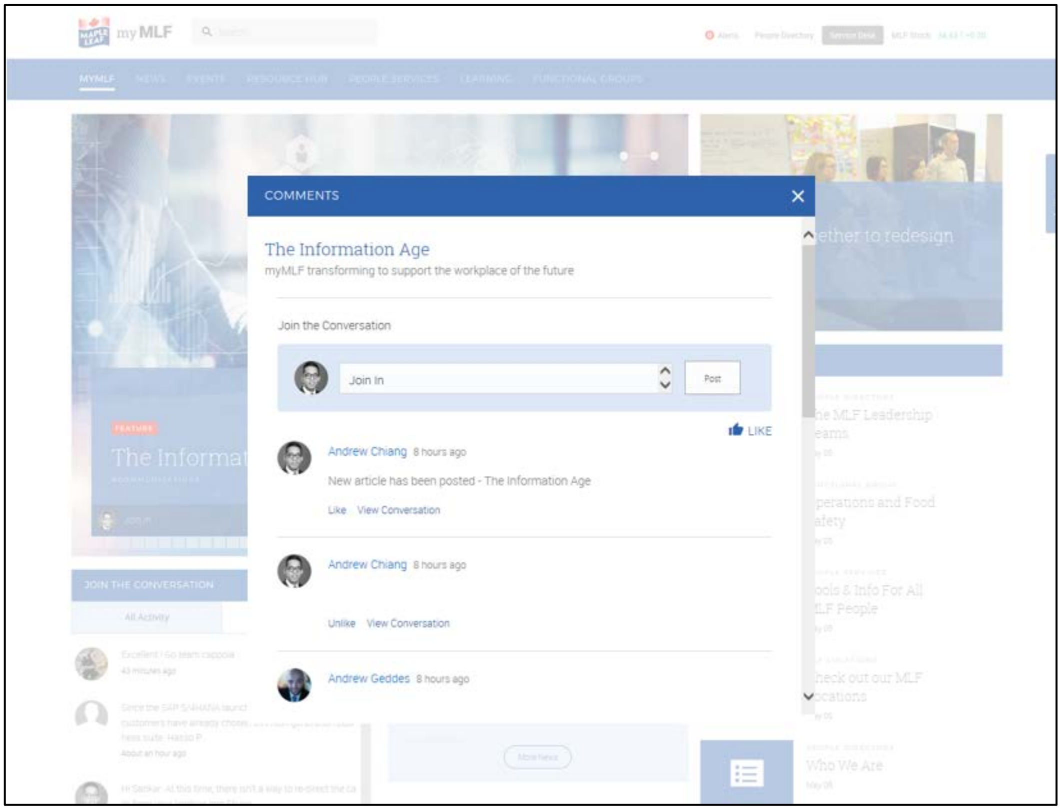


Image 103. Maple Leaf Foods Intranet Yammer Integration. Every article on myMLF has integrated Yammer features that let employees like or comment on an article right from the landing page by clicking on the social icons or the *Join In* button. These social features, which weren't as prominent in myMLF version 1, now let employees contribute to stories and start important discussions that can change how work is done at MLF. *103_MapleLeafFoods_17_myMLF_YammerLightbox_live.png*

ROI

myMLF is still relatively new, and team members are still getting familiar with it. So far, however, response to it has been exceptionally positive. Financial gain was not a primary driver of this initiative, but it is expected to drive positive productivity gains. For the project team, success meant that employees could now:

- Rely on myMLF to stay informed of what's happening at MLF and feel proud to be working there
- Feel connected to other employees and engage in open conversations to find the information they need to get work done

- Quickly navigate to or find information they need to get work done and, where possible, use automated workflows

The team also monitors a core set of metrics each month to track uptake and engagement. These metrics include:

- Number of visitors
- Number of sessions
- Session duration
- Page views (unique and total)
- Time on page
- Site speed (performance monitoring)

Success Equals Quality Engagement

Beyond kind words about the new myMLF from employees across the enterprise, the proof is really in the pudding. Prior to launching the new intranet, engagement with the site was purely transactional. Employees landed on the site because it was the default homepage. They spent little time reading the content or digging into the site's deeper layers; average time spent on the homepage was less than 30 seconds. That is, the average user loaded the page, found a bookmarked site, and navigating away almost immediately.

Since the new myMLF's launch, users have changed how they engage with the intranet. They spend their time on it more productively, contribute to two-way conversations, and participate in content in totally new ways:

- **Time well spent.** Since the new myMLF launched, the average time spent on the site 's homepage has skyrocketed to more than three minutes on average, or 10 times more time than on the previous homepage. As users have become familiar with the new myMLF, session time on the homepage has decreased, which indicates that they are quickly learning how to navigate the new site and require less time to find what they are looking for. Overall time on site/page, however, has steadily increased, and is a signal that users are finding the site's content relevant and engaging. This extra time on the site is attributable to the richer content, attractive format, and an image-heavy layout, as well as the multiple points of interaction including the Yammer integration and regular polls.

- **Contributing to the conversation.** The Yammer integration has dramatically increased content consumption. Prior to the new myMLF's launch, the average number of reads for a Yammer post was 600. Now that Yammer posts are featured on the intranet homepage, the number of reads has nearly tripled to 1,600. Active engagement goes beyond simple consumption though; the numbers of likes and posts have both markedly increased since the new site went into production. Likes are up over 400%, while posts are up 100%. Thus, users are not simply consuming more content because it is readily available on the homepage, but they are also taking part in the conversation more often by liking posts and creating their own.
- **Active participation in content.** Finally, myMLF is also about fostering employee engagement. In the past, intranet content creation was executed by a few individuals, posting through offline processes. Now, with the new myMLF, anyone can submit news or events through a user-friendly online publishing process that triggers a final inspection review with site owners prior to posting. Further, authors and subject matter experts are clearly featured on their pieces. The few individuals who previously created content can now share the workload of posting content and can shift to more of an advisor role as proficiency develops. This means a richer content experience in several ways:
    - **Content diversity.** The direct submission process encourages a greater diversity of content contributors; news articles can be submitted by anyone and are published upon approval by the site administrators (the Communications team).
    - **An expanded group of participants.** The use of Microsoft's O365 SharePoint Online offers accessibility points to the intranet for people working outside of the office. This new mobile accessibility, through an internet connection and the secure O365 login, are ideal for the field sales reps who are on the road daily with iPads.
    - **More efficient content access.** Building out the well-organized content in the new intranet and the growing adoption of SharePoint Online will let the company stop issuing new shared drives for file collaboration.

LESSONS LEARNED

Maple Leaf team members share some of the lessons they learned through this redesign project:

- **Determine up front how decisions will be made.** "Establish a process that fosters objective decision making for design elements. Set expectations up front on the inputs and how decisions will be reached to minimize the chance of selection being driven by personal preference over what the site user is receptive to."

- Document any norms, such as: the solution must be mobile responsive
  - Agree that the default option will be to defer to a specialist's recommendation based on industry best practices
  - Allow time to share a select number of alternative options directly with site users to secure their feedback through qualitative or quantitative means
  - Once style or behavior norms are established, communicate them up front and have an escalation process to deal with deviations.
- **Designate a consistent tech lead.** "Integrating the efforts of two development scrum teams can be difficult if they have not aligned on standards. This will create undue rework, so you need to designate a consistent lead to review the up-front development plans and conduct code reviews to shorten learning cycles."
- **Content and technology go hand in hand.** "Do not assume site owners or content contributors have a clear understanding of their communication strategy or needs. In order for the intranet to be successful, support for content building must go hand in hand with the technical aspects of managing content. Helping site owners articulate their communication needs leads to a clearer understanding of their functionality requirements and priorities. The success of the site is a combination of the functionality and content, and a weakness in one of these overshadows the other."
- **Set a realistic rather than optimistic schedule.** "It is extremely important to have a good and realistic schedule. You have to have enough time built in your plan to design, build, validate, and test. If your deadlines are too short, you'll make mistakes or, even worse, sacrifice functionality."
- **Start small and work your way up.** "Start with the simple features and work your way up to the more complicated ones."
- **Find a champion before you begin.** "You need an intranet champion — someone who knows the user base, their pain points, and where the most value add will be."

Best Practices

- **Socialize your designs all along the way.** "Make time to socialize your design concepts and ideas throughout the process. There were several great ideas generated during our design thinking workshops right through our high-fidelity mock-ups that we incorporated before going into development. This also helped to create excitement and buzz for our initiative."

- **Be user-focused.** “Make sure the site is geared toward the user. We learned users will be more interested in coming back to the intranet if the information is helpful and the tools aid their productivity.”
- **Establish standards for coding practices up front.** “Set up-front standards and guidelines for coding practices so that the team can deliver material that is easy to integrate. Having the main principles captured in documentation is key to empowering new resources that may be on-boarded throughout the project.”
- **Codify the style guide and share it widely.** “Document and share the design style guide so that integrity is maintained as the site continues to evolve.”
- **Make the first release count.** “Consider a release cycle in which the fundamentals are delivered in v1.0 followed by additional feature releases in short cycle periods.”
- **Help users transition.** “Help people make the transition. No matter how good your communication plan is, be prepared for the first couple of days when users can’t find what they’re looking for. Having a dedicated team to respond to inquiries has some perks, such as being able to solve their problem on the spot, point out some new timesaving features for them to explore, quickly resolve bugs or make fixes to address high-value content that’s been missed. Trust me, you will miss something.”

PKP Energetyka S.A.

OVERVIEW

COMPANY

PKP Energetyka is one of the largest energy companies in Poland. It provides maintenance, sells, and supplies electricity to trail and business customers, and maintains 20,000 kilometers of distribution network.

Headquarters: Warsaw, Poland

Company locations: The company has multiple locations and divisions across Poland, with headquarters in Warsaw.

Locations where people use the intranet: Employees at all PKP Energetyka locations use the intranet. The company also provides kiosks for field workers and service technicians.

Annual revenue: Approximately $1.2 billion USD in 2014

THE INTRANET

Users: Approximately 7,000 users working across the country use the company's intranet. This includes staff working in offices and field workers and service technicians who access the intranet using kiosks.

Mobile approach: Responsive web design

Technology platform: SharePoint 2013

TEAM

The company had a dedicated in-house team that worked closely with the outside agency, Elastic Cloud Solutions. The internal team was built around the Communication Office, with help from the Project Management Office and System Administration Department.

In-House Team: Marcin Domalążek, Senior Specialist, Project Management Office; Dariusz Szkup, Head of System Administration Department; Krzysztof Kiełmiński, Director of Communication Office; Małgorzata Szewczyk and Grzegorz Siwek, Specialists in Communication Office

INTRANET TEAM

Team members shown here (left to right): Dariusz Szkup, Malgorzata Szewczyk, Marcin Domalazek, and Krzysztof Kielminski.

HIGHLIGHTS ABOUT THIS WINNER

The PKP Energetyka intranet team wanted its site to be a thing of beauty. In a company that uses many big, complicated internal systems that require expert knowledge, the team wanted the intranet to be as easy to use and beautiful as possible, allowing all employees to use it without needing any expert knowledge. Mobile access was also critical, as many employees work outside the office.

When looking for an intranet solution, the team decided on Elastic Cloud Solutions, as it fit well with the company's plans to create something quickly and encourage adoption. The tool enabled easy content creation and editing, while using the power of SharePoint's advanced features, such as permissions and versioning. Today, 90% of staff uses the site on a daily basis.

- **Improving internal communications.** The company previously used email, print, and shared drives to disseminate information. Two internal publications — one monthly and one quarterly — and a daily email digest have now been moved onto the intranet, allowing the company to share information reliably and, for the first time, track the content's readership to help the team learn about its audience.
- **Iterative development.** The team created the new site in stages, with short-term sprints. After each sprint, the team would share the site with employees, who could use and test the site in production and submit

feedback via a special button on the page. This let the team quickly show employees what it was developing, keeping people engaged and informed along the way. In contrast to custom development, which can be quite time-consuming, the boxed solution let the team quickly deliver results.
- **Simplified content creation.** The tool uses a Block Editor with ready-made elements that can be added to a page via drag and drop, allowing non-technical people to create nicely designed content combinations. This editing tool is used throughout the site, allowing quick content creation.
- **Knowledge management.** Information has moved from shared drives to the intranet. The intranet has a wealth of knowledge-sharing tools and features, including *Knowledge Articles*, a crowd-sourced *Ideas Bank*, a discussion forum, and extensive FAQ pages on a variety of topics. Vademecum pages are used for onboarding new employees, taking them through information in a specific order. A chatbot also helps users, answering questions and letting them fill out forms using a natural language interface.

BACKGROUND

PKP needed a new intranet platform to improve internal communication and encourage engagement with and among its 7,000 employees working throughout Poland. These employees include staff working in offices, as well as field workers and service technicians who service the 20,000 kilometers of distribution network. Prior to the new intranet, the organization had mainly relied on email to keep employees informed, which obviously wasn't the best tool for the job.

Goals

The team outlined a list of goals that the new platform would have to meet for the project to be a success. First, it needed to provide exceptional user-centered design, rather than simply be a pretty face on top of SharePoint. Next, the designers focused on ease of use and mobile access. Other top priorities included:

- **Support digital publishing.** PKP Energetyka has two internal publications, published quarterly and monthly, and a daily press digest. The designers wanted to distribute these publications digitally so they would reach more readers, and so they could track user interests by monitoring comments, recommendations, and statistics.
- **Extend functionality.** The designers wanted a platform that would let them extend intranet functionality without requiring additional development. That meant they had to find a platform that would let them evolve user engagement over time and also save the organization time and money.
- **Support applications.** Part of the intranet's business case was to support a list of required applications — including an address book, organization structure, newsletter, dynamic forms and surveys, and knowledge management features — to turn the intranet into a full-featured digital workplace.

- **Quick deployment.** Because a short delivery time was very important, the team searched for a platform that offered quick deployment and adoption opportunities.

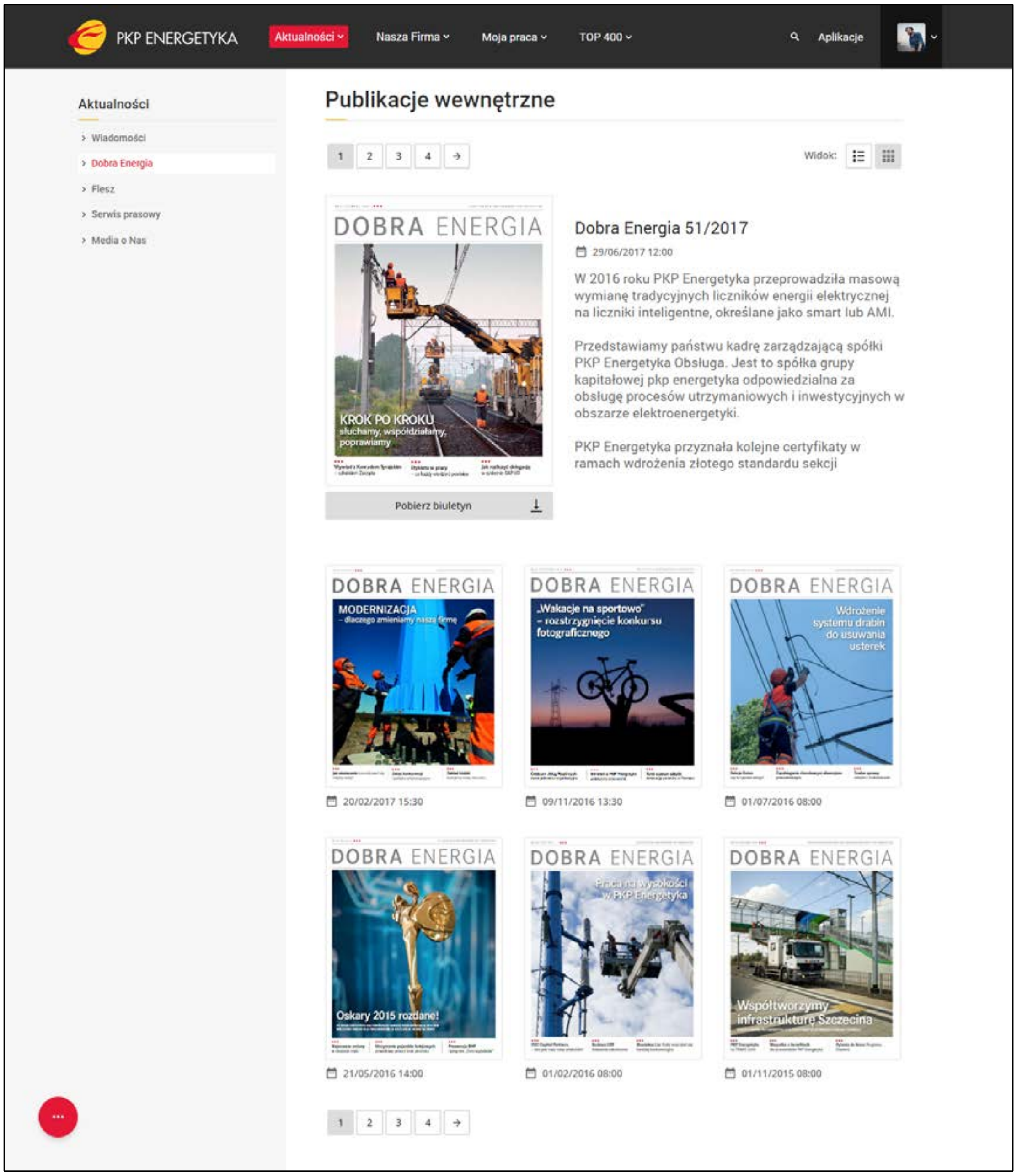


Image 104. PKP Intranet Internal Publications Grid View. The list of publications (grid view) shows all of the company's internal publications, with the newest one at the top. Users can easily download an attached file (*Pobierz biuletyn*) to read the magazine or go to publication's page to learn more. *104_PKPEnergetyka_01_internal_publications_grid.png*

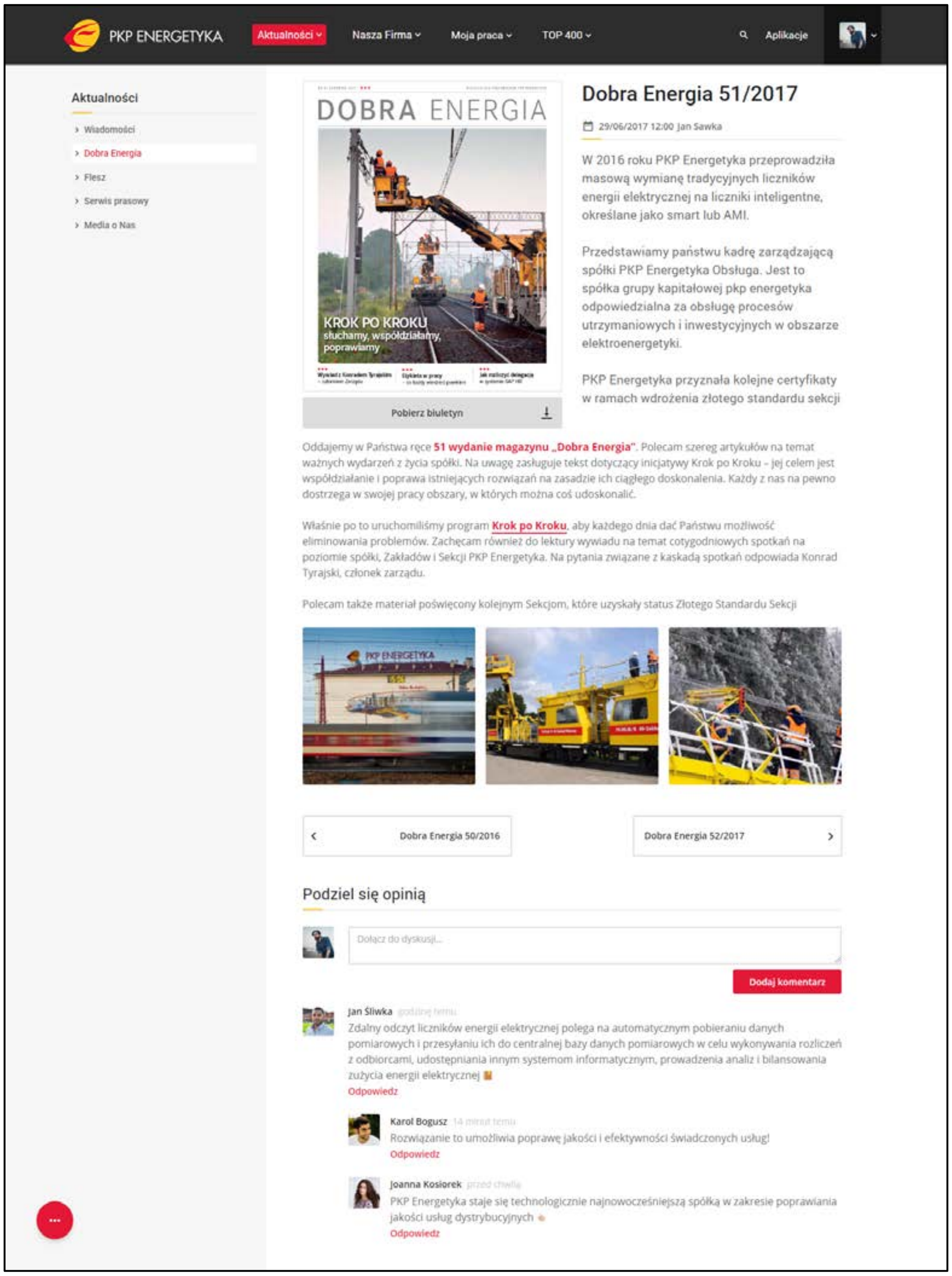


Image 105. PKP Intranet Internal Publication Page. The publications page presents information in an interesting way thanks to content blocks and the Block Editor tool. Users can easily post comments and browse next/previous publications by clicking on pagination buttons.
105_PKPEnergetyka_02_internal_publications_page.png

Choosing and Executing on a Technology Platform

The PKP team initially looked to partner with a solution vendor to help it build a new intranet from scratch, but the deadline was too tight and, in most cases, the time required for analysis, development, and adaptation was too long. So, the team instead decided on a turnkey intranet solution would make the process simpler and more agile.

It chose Elastic Intranet as a foundation for many reasons, but one of the key drivers was its ease of use. The team felt this tool would let even less-experienced users easily create and manage content.

The project was divided into short-term sprints so team members could iterate development in short cycles, giving them a window into how things were going in even the earliest stages. Each sprint ended with a personal meeting with the agency partner to review progress and set the direction for next steps. This approach gave the PKP team a solid overview of the development state and also showed consistent improvement as the intranet took shape.

This approach had another great advantage: it let the designers share completed stages with PKP employees so they could use and test it while it was still in production. During those releases, employees could submit feedback using a special button located directly on the intranet. This not only gave the designers feedback, but it also let them trace the evolution of the adoption process and react to users' requests quickly. Intranet traffic statistics also helped them identify the most-used areas and the pages users hadn't visited at all.

This iterative approach was very successful and let the team easily implement new innovations to keep people informed, engaged, and more connected.

Using a turnkey intranet solution also provided a base of standard features and the opportunity to layer further innovations on top. Thus, the team could quickly deliver, test, improve, and iterate in Agile cycles, rather than have to start with a series of long, complicated custom development processes right out of the gate.

DESIGN REVIEW

Homepage

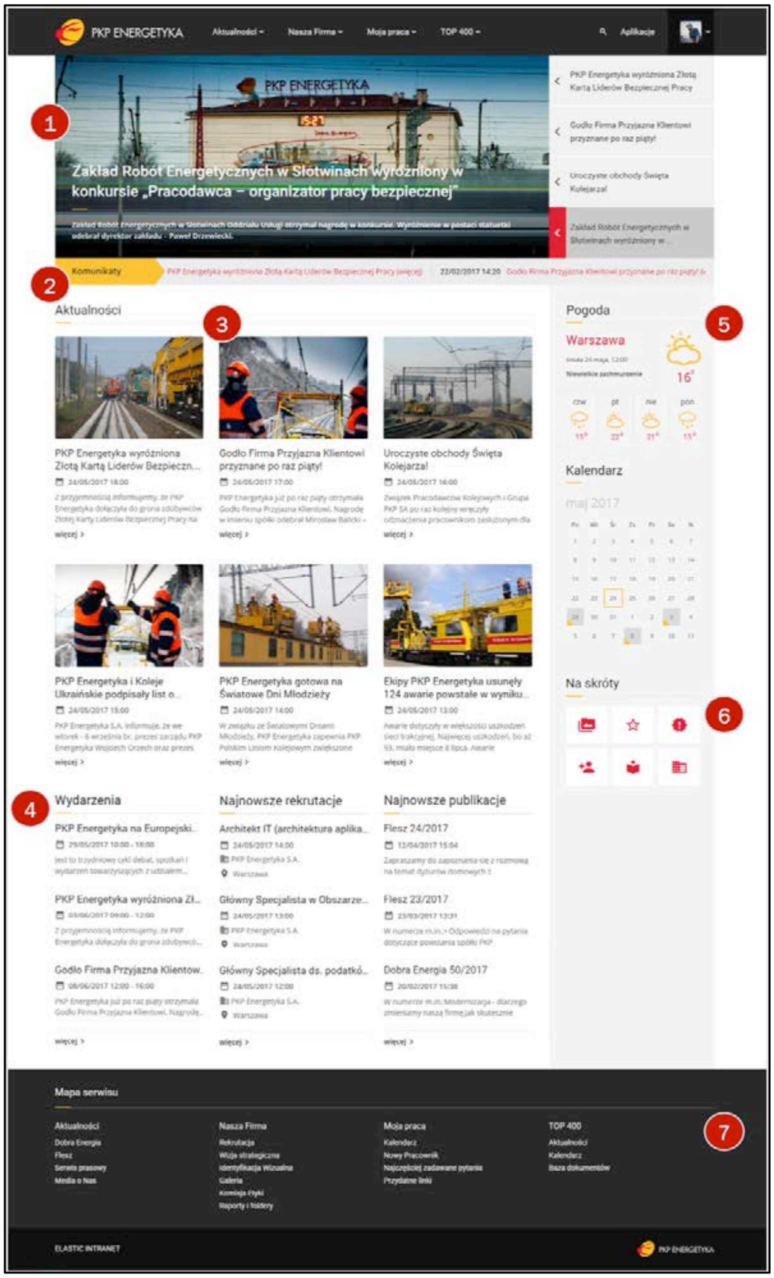


Image 106. PKP Energetyka Intranet Homepage. The homepage combines news, events, and quick access to tools with a clean and clear design. *106_PKPEnergetyka_03_homepage.png*

Homepage Highlights

1. **News carousel.** A news carousel appears at the top of the page. It lists the names of the featured stories on the right side, so users can easily navigate directly to a story of interest. This helps with one of the main usability issues with carousels: items other than the featured item are often overlooked. It also gives users direct control. The current article is clearly distinguished from the rest with the use of a red arrow and gray shading. Each featured item is displayed with an image, headline, and brief summary.
2. ***Komunikaty* (messages).** A scrolling message bar, similar to a news ticker, appears beneath the news carousel, showing additional headlines or important announcements with optional links, along with the date and time they were posted.
3. **News.** The center of the page shows the latest news, which is personalized for the user based on permissions and audience type. News items are shown in a grid format, with an image, headline, date and time posted, and a brief summary.
4. **Current information.** Below the news is a list of events, job postings, and publications. Events include the date and time and a brief description. Job listings include the job title, time posted, company, and location. Publications feature the content from previous monthly and quarterly print publications, with the publication's name, date, time, and highlights posted on the homepage for easy access.
5. **Weather and calendar.** The right side of the screen includes the weather forecast based on the user's location (in this case, Warsaw). Below this is a calendar that highlights the current date and dates of upcoming events, which users can click for more details.
6. **Shortcut links.** The bottom of the right column includes links to important tools, each indicated by an icon. The icons represent different external tools and internal areas, and the link titles display when users hover over them. These shortcut links are configurable.
7. **Footer.** The page footer shows the site's structure, giving people an overview of the site's content and navigational structure. This type of footer can be particularly helpful on mobile, as it repeats the navigation without forcing users to scroll to the top of the page to navigate. The three main navigational categories are *News*, *Our Company*, and *My Work*. The *Top 400* is a separate intranet area for a group of managers; it has dedicated news, calendars, and knowledge.

Apps Menu

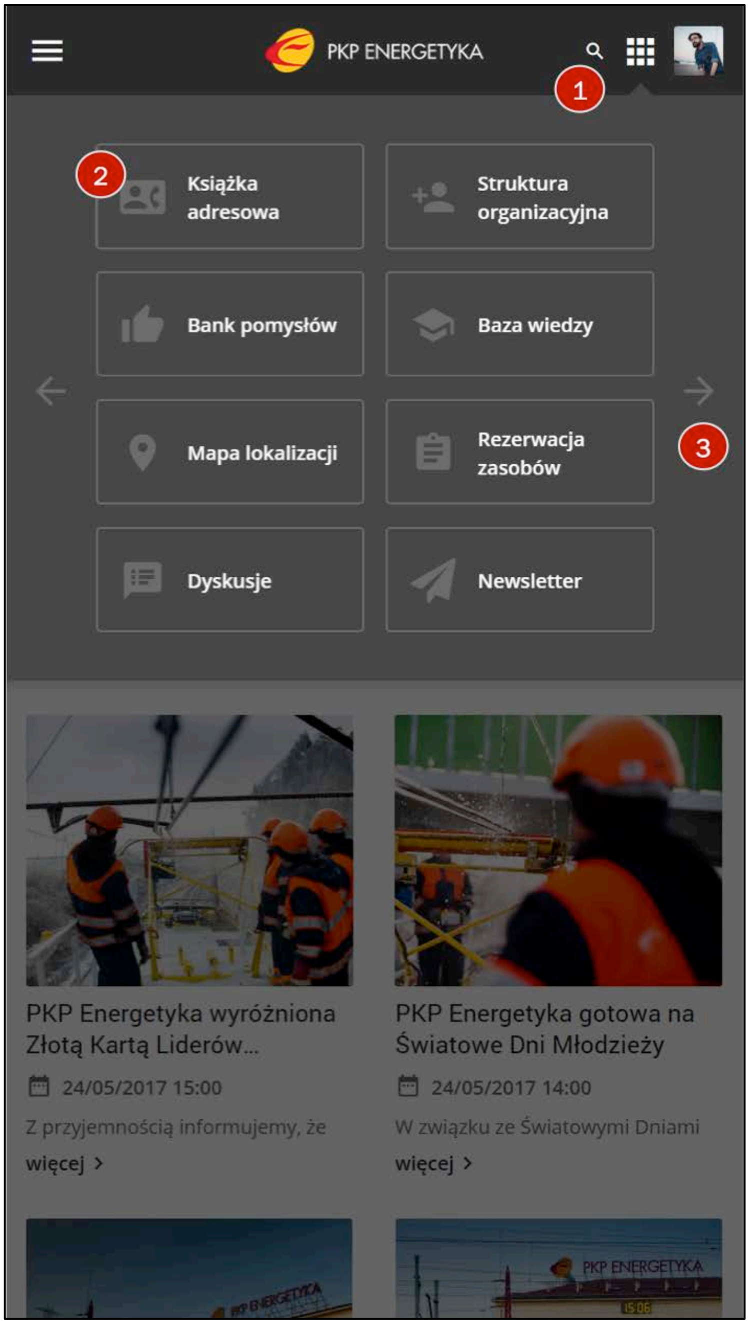


Image 107. PKP Energetyka Intranet Apps Menu. The apps menu is available across the whole site; here it is shown in a mobile view. *107_PKPEnergetyka_04_appsmenu_mobile.png*

Apps Menu Highlights

1. **Constant access.** The apps menu appears on each site page. On mobile, it appears as a small square made up of smaller boxes; on desktop, when space allows, the same design also includes a label (*Aplikacje*). In both designs, the menu appears next to the user's profile picture. This area links users to internal and external apps that are important to daily work. Administrators select these apps, which include things like the address book, organizational structure, *Idea Bank* (an area to share ideas with colleagues), and discussion.
2. **Apps.** Each app is listed by icon and name. Tapping or clicking on the rectangle leads to the app. The boxes around the name and icon are a good size touch target on mobile.
3. **More apps.** Arrows on the side of the menu indicate that more options are available. On mobile, users can swipe to the left and right to see additional apps; while on desktop, users can click.

FAQs

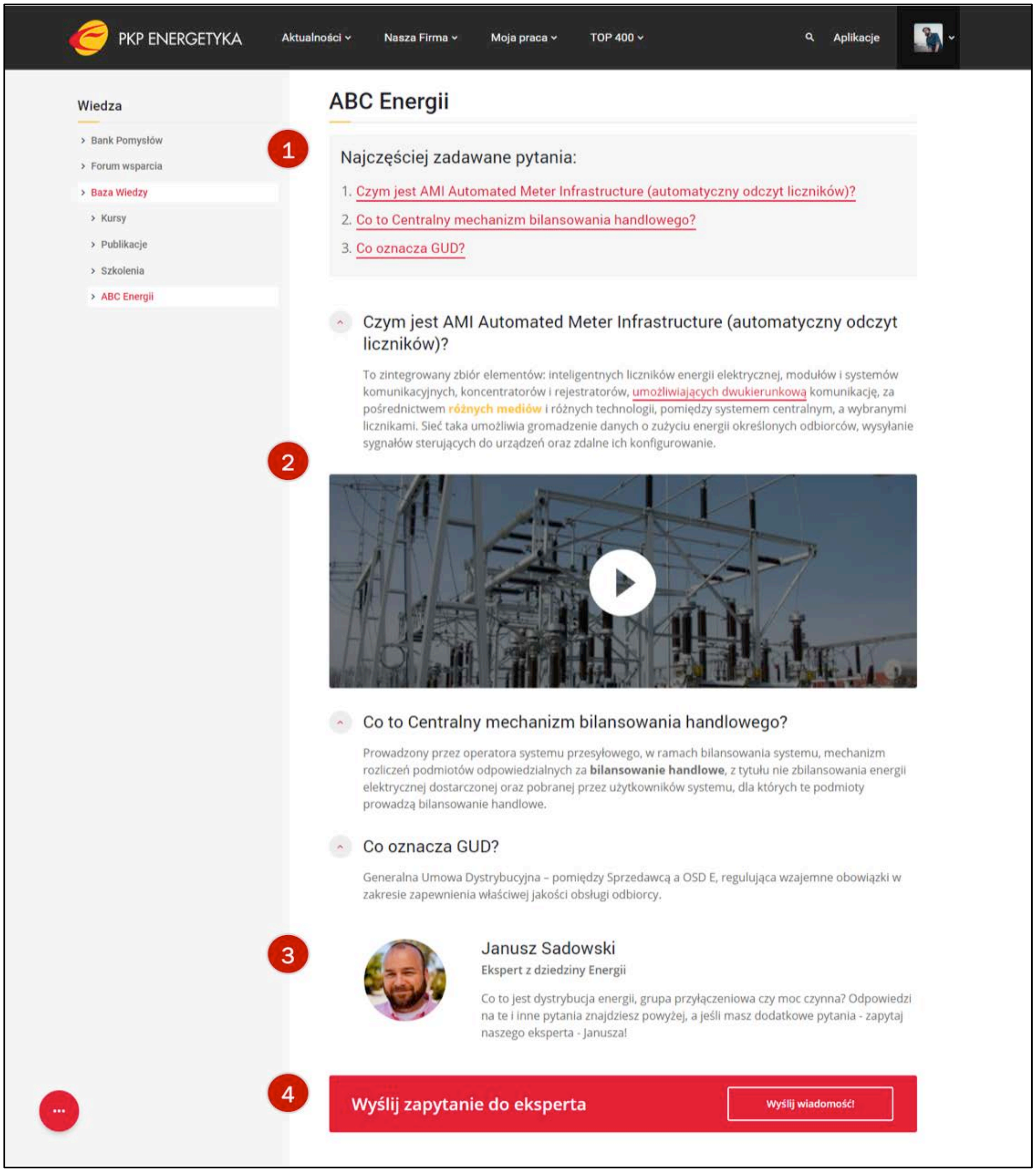


Image 108. PKP Energetyka Intranet FAQs. The site offers many knowledge management tools, including pages of Frequently Asked Questions. *108_PKPEnergetyka_05_askanexpert_page.png*

FAQs Highlights

1. **Summary.** FAQ pages summarize common questions, answered by experts within the organization. Questions are listed at the top of the page, so users can quickly see the information available as well as link directly to the answer. This direct information access is particularly helpful on mobile screens, taking users to the exact content of interest on a long, scrolling screen.
2. **Responses.** Experts can include videos or images along with the text in their responses. The responses are concise and clear, with links to related information as needed and bold keywords to highlight important content.
3. **Experts.** The expert's name, picture, and area of expertise (here, "the field of energy") are listed at the bottom of the page. This helps employees get to know one another by associating faces with names. Sample questions are listed along with a prompt to ask the expert a question.
4. **Submit additional questions.** The red box at the bottom of the page prompts users to submit a question, with a clear link to send a message. The page encourages users to ask questions if they do not see the information they need. When the question is answered, it is automatically published to the FAQ so others can see the answer as well, benefitting the whole company.

Events

Image 109. PKP Energetyka Intranet Events.
Internal and company-wide events are shared on the intranet.
109_PKPEnergetyka_06_company_events_page_mobile.png

Events Highlights

1. **Event pages.** The site offers a calendar of company events, where editors can easily add items and create event pages. Event pages have the event title at the top, together with an image, the location, and the address, which links to a map. The event date is shown along with an optional sign-up button. Events list seat limits or registration deadlines as needed. The site also allows event organizers to send messages to all registrants or to export a list of registrants.
2. **Vivid pages.** As in all areas of the site, the Block Editor tool can be used to add images, videos, highlighted quotes, agendas, and more to make the page visually appealing as well as informative. Both mobile and desktop pages are streamlined and engaging.
3. **Commenting.** Users can comment on the event, asking questions or sharing information. Event pages stay live after events as well, letting users upload photo galleries or videos from the event.

Chatbot-style Forms

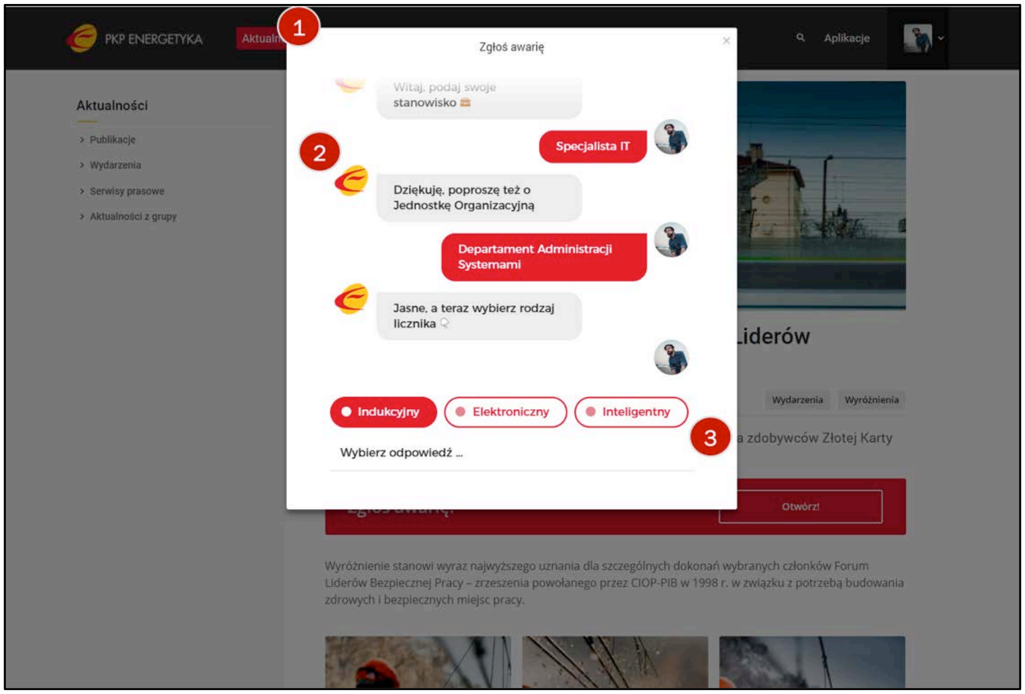


Image 110. PKP Energetyka Intranet Chatbot-style Forms. Some simpler forms are created in a chatbot-style, conversational interface. *110_PKPEnergetyka_07_forms_chatbot.png*

Chatbot Highlights

1. **Conversational forms.** Forms are easy to create on the site, but users can also create "conversational forms" or chatbot-style interactions. In these forms, rather than filling in a series of fields, a chatbot asks users a series of questions. The goal is to engage users and to make filling in information feel more like a human conversation. PKP is experimenting with this form of communication, and so far, it has found that it's a better fit for simple forms and conversations than for long or complicated forms. Initial conversion rates on simple forms have been several times higher than on standard forms.
2. **Conversation.** A form is presented as series of questions and responses. This interaction asks about the user's position and organizational unit.
3. **Multiple choice.** The chatbot allows text replies or can provide multiple or single-choice responses for users. Here, users can choose from three predetermined options.

Block Editor

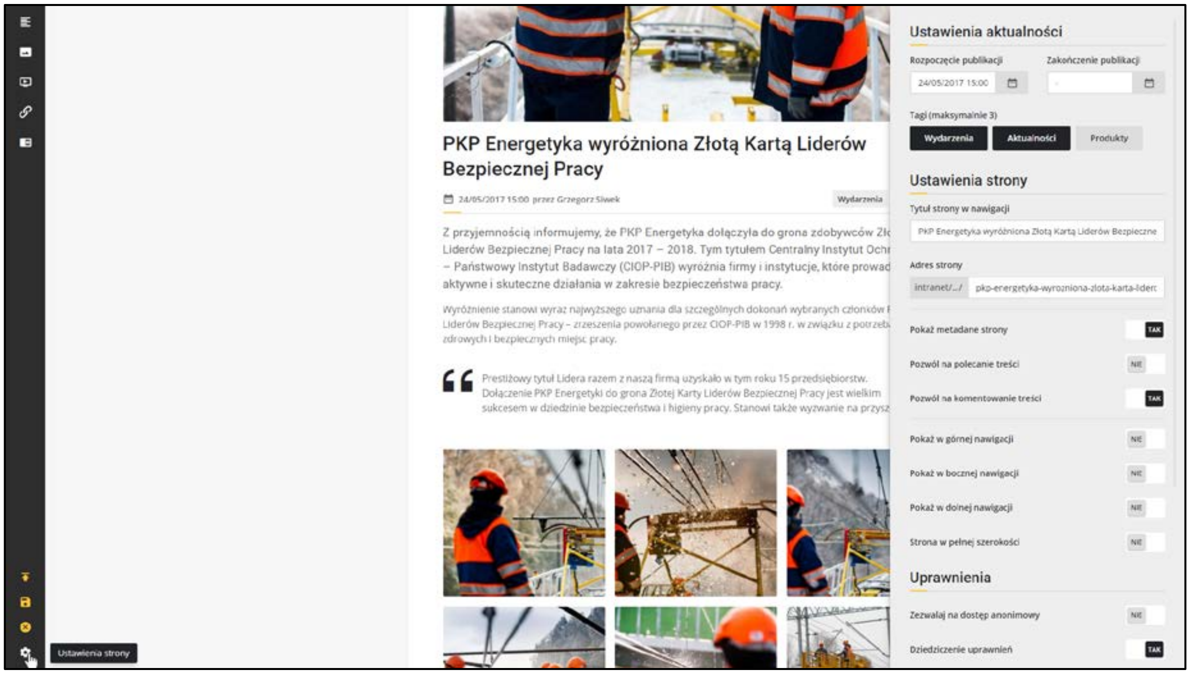


Image 111. PKP Intranet Page Settings. Every page has settings in the edit mode. In this case (a news page), editors can set publication start and end date, choose tags, change the page title and URL, choose to display the page's meta data (date, author, tags), allow comments and recommends, and choose where in the navigation the page will appear (top, left, or bottom); they can also manage permissions and browse page's versions.
111_PKPEnergetyka_08_blockeditor_pagesettings.png

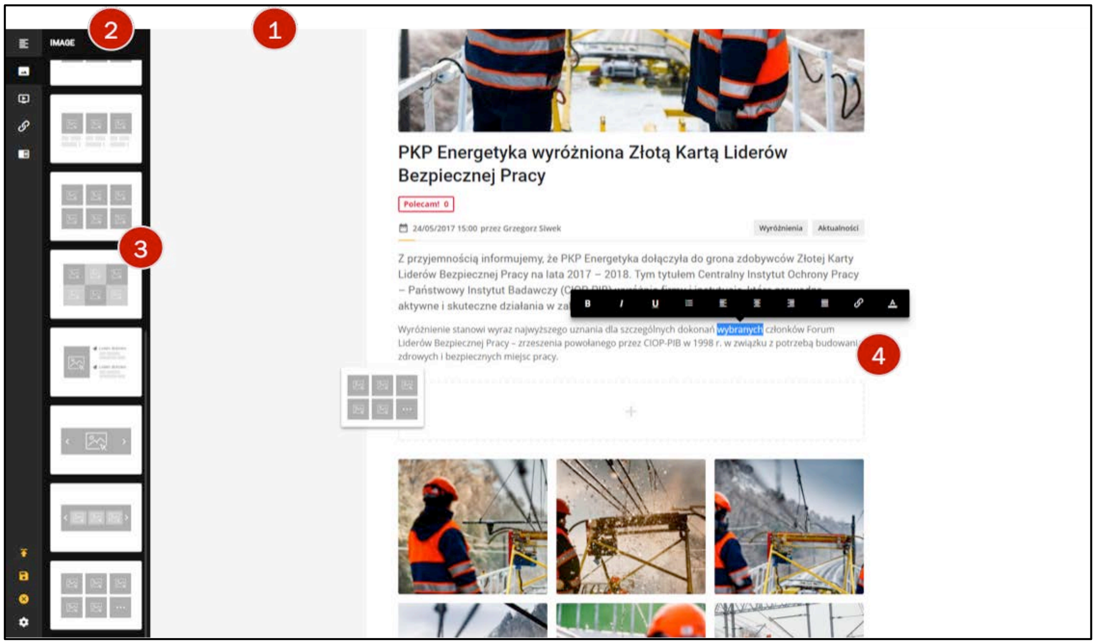


Image 112. PKP Energetyka Intranet Block Editor. A simple CMS lets editors quickly create content with a consistent look and feel. *112_PKPEnergetyka_09_blockeditor.png*

Block Editor Highlights

1. **Easy content creation.** The CMS is simple to use and allows editors to easily add elements to pages via a drag-and-drop interface. There are more than 100 different intranet blocks that follow the same style guide, letting users create many different pages while maintaining a consistent look and feel across the site. Editors can access the Block Editor from any page on the site.
2. **Block categories.** The Block Editor has five different categories of "blocks": text, image, media, links, and content.
3. **Options.** Options are presented on the left side of the screen and can be dragged into place. This shows users different layout options for incorporating images into a page. They can upload images or select from corporate images and a free stock library. Images are automatically optimized for different screen sizes. Blocks can also be used to create items with business logic, such as contact forms, and integrations with other tools, such as SharePoint calendars.
4. **Text editor.** Text can be edited in place, so users instantly see what the text will look like. Some elements, such as size and font style, are constrained to retain a consistent look and feel across the site, but users can format the text and add links where needed.

Locations

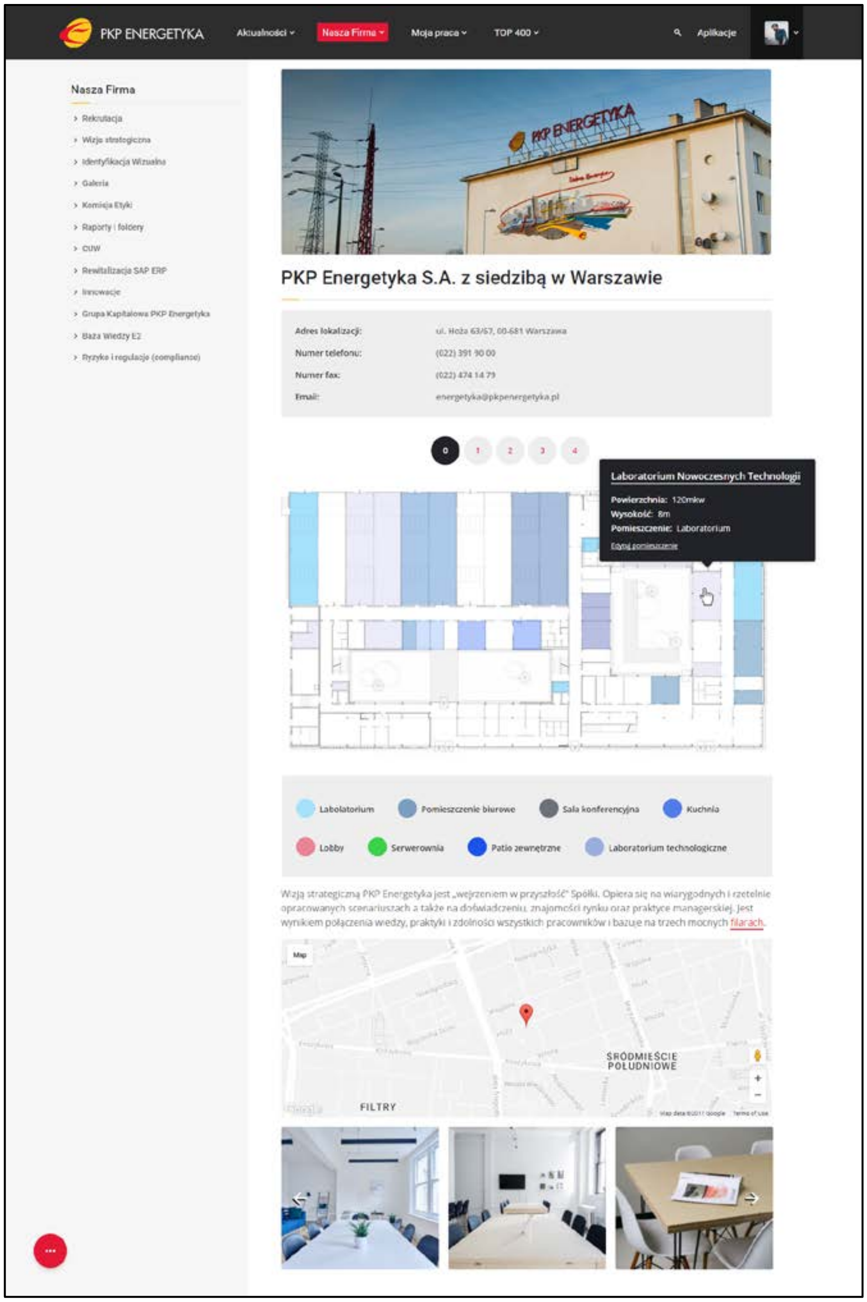


Image 113. PKP Intranet Location Page. The location page is a great way to provide important details about a company location. Here, it also displays floor plans with rooms marked; users can easily choose a room, view its details, and go to the room's page. The legend under the floor plan shows colors with room types so users can easily figure out which rooms they're looking at. Location pages can feature any type of info, from text to galleries to maps. *113_PKPEnergetyka_10_location_page.png*

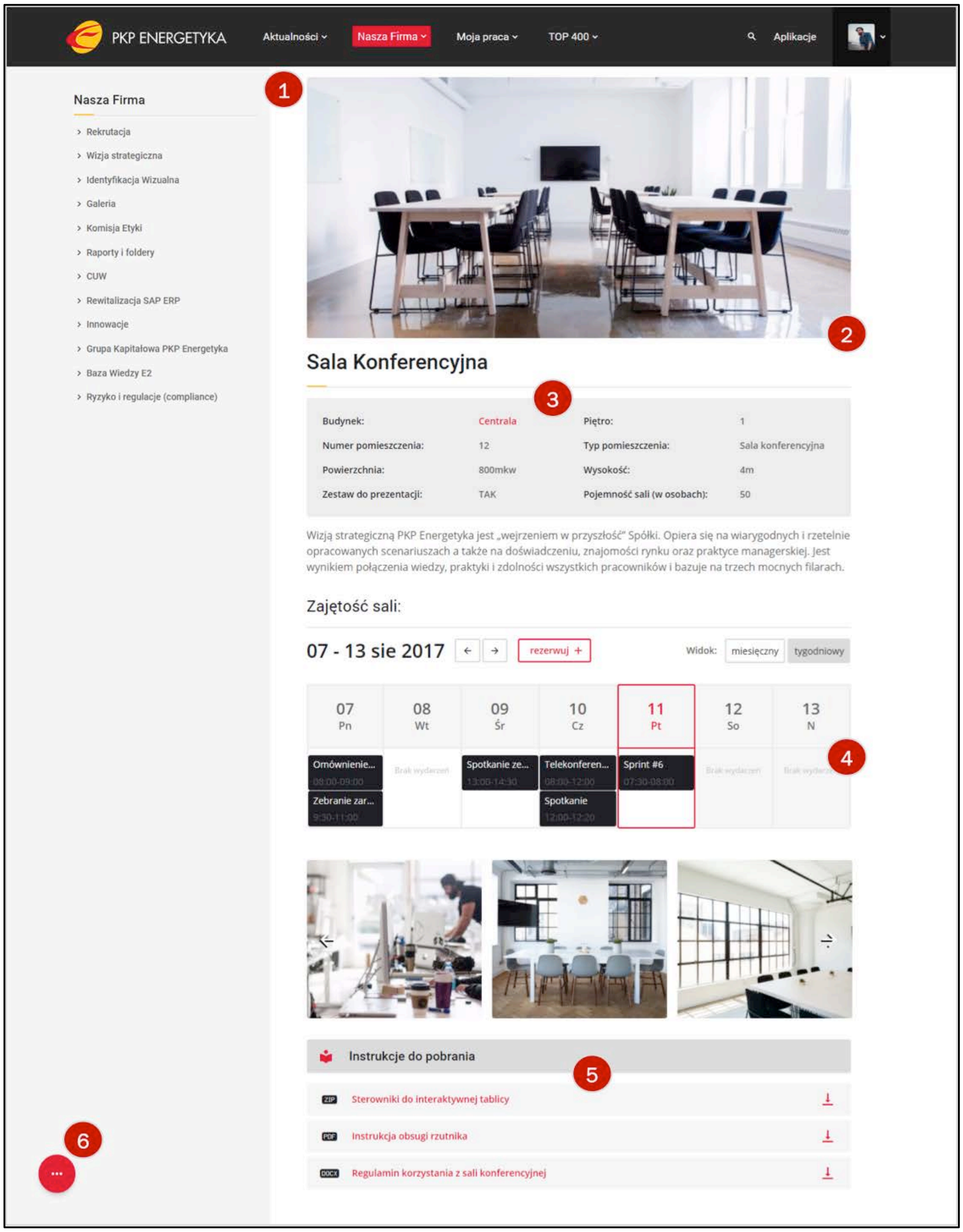


Image 114. PKP Energetyka Intranet Location Pages. Location pages provide details and allow bookings. *114_PKPEnergetyka_11_room_page.png*

Location Highlights

1. **Detailed information.** Each office building has a location page, and users can view the details of specific rooms in an office by clicking on the marked rooms in the floor plan. To mark rooms, users simply click on the corners. They can then set rooms as conference rooms or individual offices; the latter lets the site list all employees working in specific offices.
2. **Photos.** Pictures show the inside of the room to help with planning.
3. **Room details.** Specific information about a room is summarized at the top of the page and includes location and seating capacity. The intranet teams also plan to use Bluetooth-powered beacons in room booking so that, when people enter a meeting room, the TV and projector will automatically display the meeting's profile cards and agenda.
4. **Booking.** Rooms can be booked through Microsoft Exchange calendar blocks. Users can see if the room is available and, if so, schedule it using the *rezerwuj+* button. (The same type of system is used to book other company resources, including company cars and equipment.)
5. **Downloads.** The bottom of the page features a set of downloads that might be needed to use equipment in the room, such as drivers for the interactive whiteboard.
6. **Editing.** The red dot in the screen's lower corner indicates that the user viewing the page can make edits. Clicking it leads to the Block Editor CMS. Only global and local editors can edit and create content. For editors, this red dot is available on every page, not just location pages.

Search

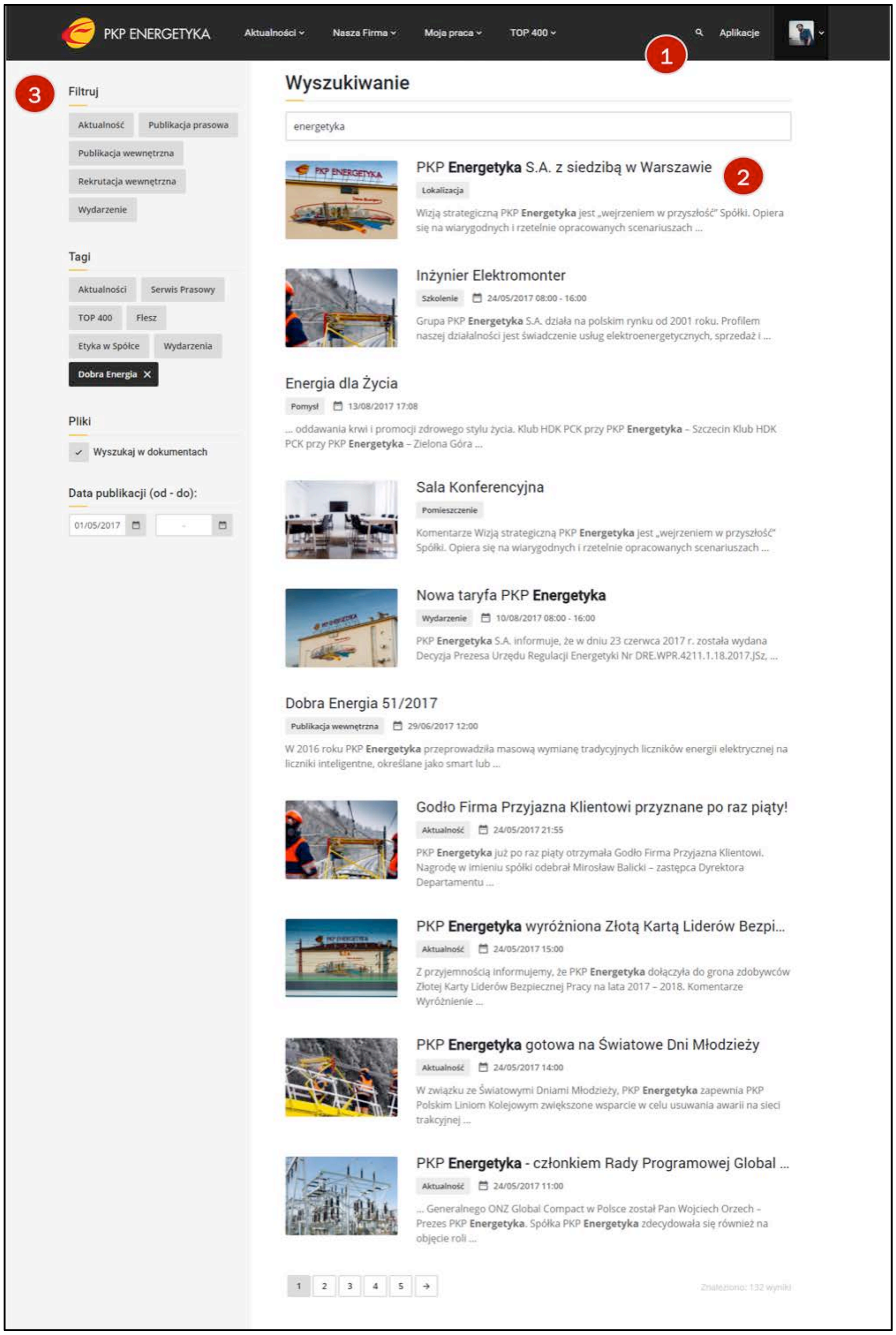


Image 115. PKP Energetyka Intranet Search Results. Search results include both intranet content and documents.
115_PKPEnergetyka_12_search_results.png

Search Highlights

1. **Magnifying glass.** Search is available on every page of the site via the magnifying glass icon in the top navigation bar. The site searches both intranet content and documents. Documents are indexed by SharePoint to allow for full-text search.
2. **Results.** Results include a cover photo for the content when applicable. Results show the document title, date it was posted, and a summary with the search query highlighted in context.
3. **Filters.** The side of the page offers filters that let users narrow the results by categories, such as news or press releases, and tags, such as news or ethics. Users can also toggle the document search on or off if they prefer to look only at intranet content. They can also refine by publication date as needed.

DESIGN PROCESS AND USABILITY WORK

Because PKP chose a ready-to-go intranet product as a base, most of the design and UX job was done. The team was thus able to deliver finished modules, in parts, to one of its departments to beta test the design and features. Users then posted their comments and feedback in a special form available on each intranet page. The team analyzed usage stats and reviewed, fixed, and iterated in record time.

After a few release cycles, the team decided not to publish all modules at once. Instead, it decided to start with a few core features and then introduce the rest gradually to build up engagement and excitement, because some users felt overwhelmed and lost at first.

Adoption and Buy-in

Another big advantage of the Elastic Intranet is that hundreds of thousands of people around the world already use it, so the platform features many best practices in terms of adoption. Also, at PKP, buy-in was fairly easy to achieve because the previous intranet wasn't the first thing users wanted to open in the morning. The team released its new intranet to the organization with a promise that it would provide a single, centralized information source, and that alone was a big advantage for all employees.

Additionally, the team planned marketing actions to promote the portal. These ranged from ads in its printed magazines, newsletters, and participation in live chats with the company's board members.

OUTSIDE AGENCIES	
Agency	**Project Role**
Elastic Cloud Solutions Provides a set of tools for improving internal communication, employee engagement, and optimizing processes	• Provided its ready-to-go intranet product and, with the team's help, designed specific areas and developed new modules. Elastic also shared its expertise around best practices and intranet adoption.

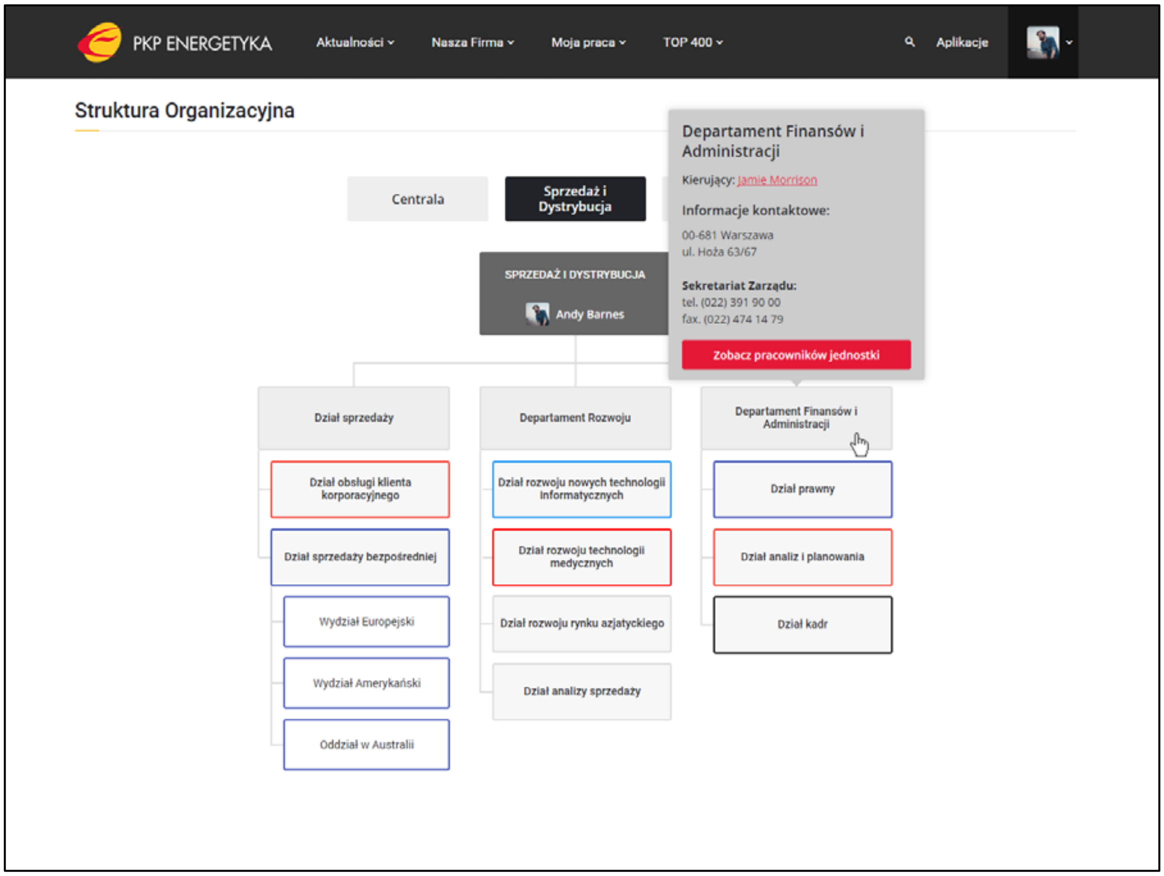


Image 116. PKP Intranet Organization Structure. The dynamic organization structure can be expanded horizontally and vertically and may contain multiple levels. Every unit can have a manager (featured with a photo) and contact details set. Clicking on a unit will show a popover with all the info and a button (*Zobacz pracowników jednostki*) so that users can quickly go to the address book with that unit filtered, so only employees working in that unit will be displayed. *116_PKPEnergetyka_13_organization_structure.png*

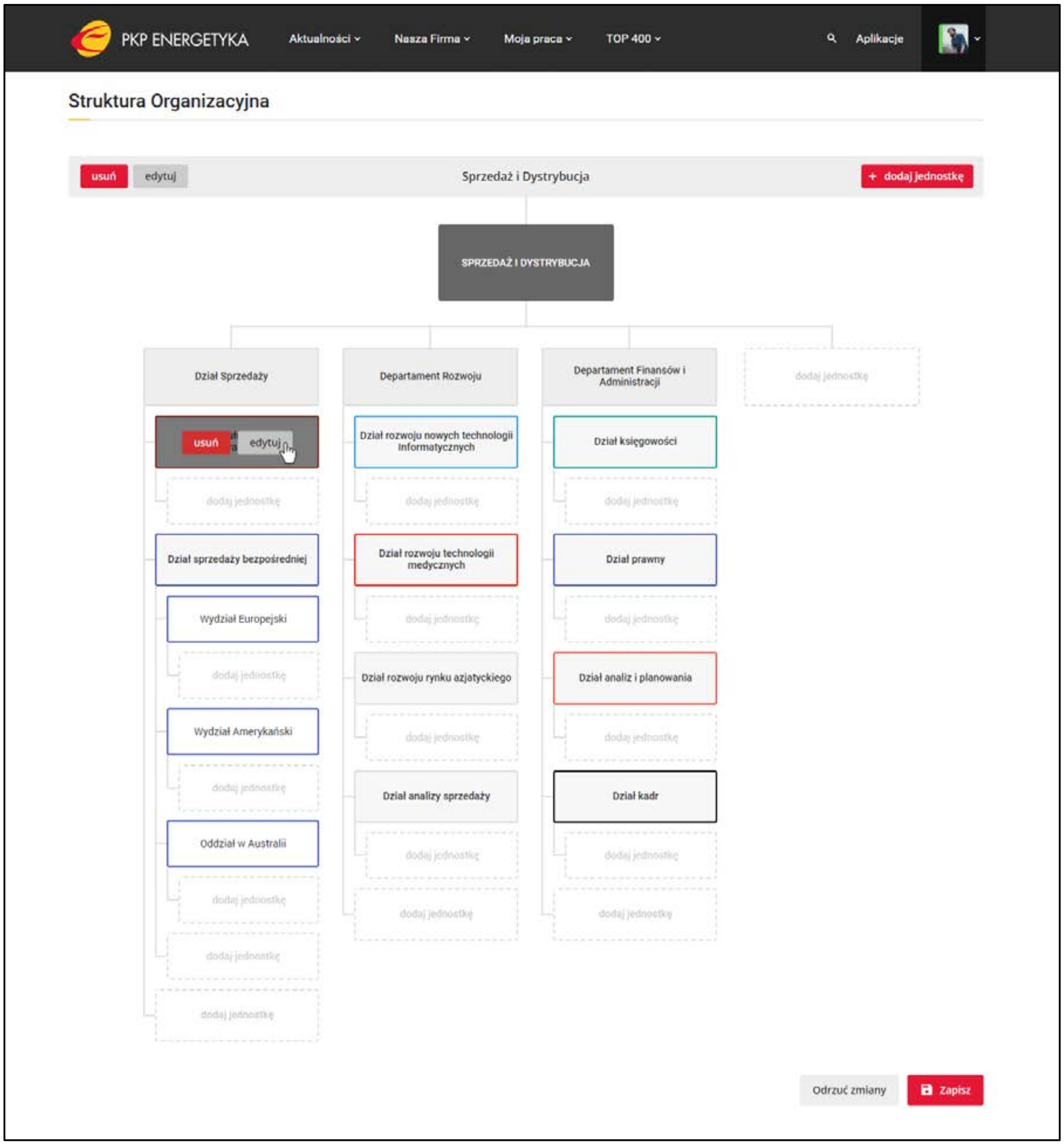


Image 117. PKP Intranet Organization Structure Edit Page. Organization structure is easy to edit. To add a new unit on any level, the editor simply clicks *dodaj jednostę* on that level.
117_PKPEnergetyka_14_organization_structure_edit.png

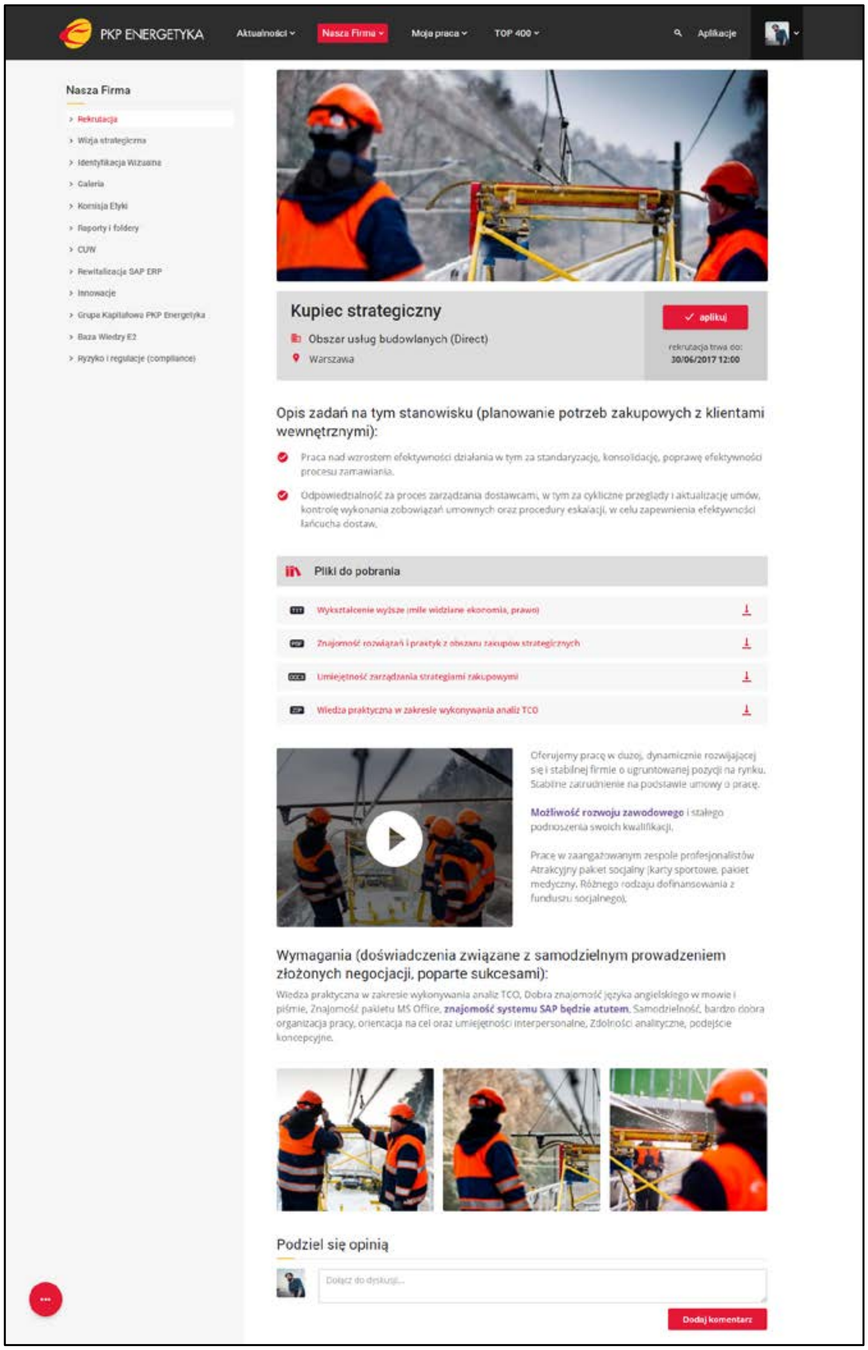


Image 118. PKP Intranet Internal Recruitment Page. The internal recruitment page features information about job title, department, and location. Users can apply for a job using the *aplikuj* button, and editors can set an expiration date (*rekrutacja trwa do*). Job offers can contain any needed information, including photos, videos, and files.
118_PKPEnergetyka_15_internal_recruitment_page.png

GOVERNANCE

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Communication Office	• Content management, governance, and promotion
Content Owners	• Updates and consistency of their sections, as well as promotion
IT Support	• Helpdesk requests

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://intranet
Default Status	• The team recently set the intranet as a global homepage for all users to encourage them to create a habit of checking the latest information each day.
Remote Access	• Users can access the intranet from mobile devices through private APN and through the internal network.
Shared Workstations and Kiosks	• A significant group of PKP employees work outside offices, so shared workstations and kiosks are provided at all locations around the country. As a result, every employee can log in to the intranet, and the company can easily manage which content is distributed to remote locations and even engage users with internal ad campaigns.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
June 2016	• Begin research for intranet
August 2016	• Begin intranet implementation, conducting tests and releasing iterations
September 2016	• Initial pre-release
October 2016	• Beta tests with one department
November 2016	• New intranet generally available company-wide
March 2017	• New features and optimizations added

CONTENT AND CONTENT CONTRIBUTORS

The Communication Office is mainly responsible for all content preparation and creation. Each member of this six-member team is responsible for a specific area and all of them take part in reviews, quality guidance, and planning. Weekly meetings are held to ensure a consistent approach and to plan further content campaigns. Meetings are also a great opportunity for the team to brainstorm ideas and make suggestions.

Deploying the new intranet was a great opportunity for team members to rethink how content is handled, so they started from scratch, focusing first on the critical areas, such as documents, reports, and publications. They then went on to define three main areas around which they would build new content, based on the old content that was migrated from old static files to the intranet's new pages.

Elastic Intranet comes with its own CMS, which allows the team to quickly create beautiful, rich content that looks great on any device, without any technical skills needed. Page elements (such as text, photos, galleries, videos, and forms) can be added by simply dragging and dropping. All of the more than 100 ready-made blocks are made in the same style and can be easily used for any of the intranet's content, letting users create hundreds of perfect-looking content combinations.

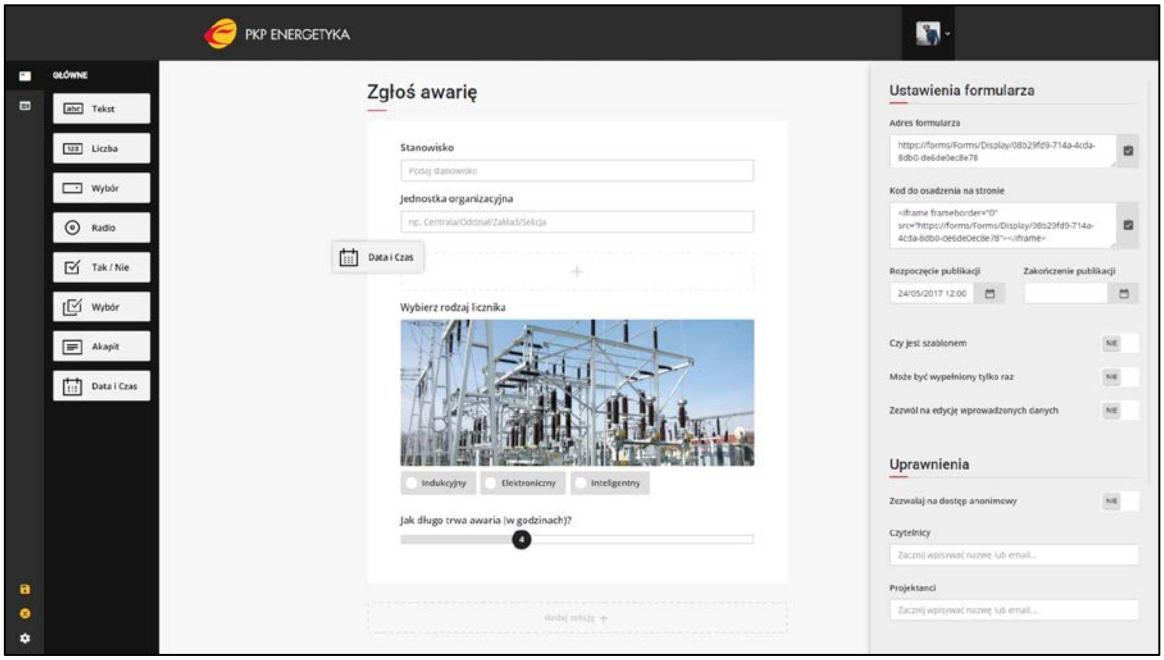


Image 119. PKP Intranet Creating a Form. Forms are built from input blocks by simply dragging and dropping them into a form. Users can choose the blocks from a list of inputs. This also shows form options: editors can copy a form's URL or embed code, set publication start/end date, and save it as a template. They can also choose whether forms can be filled in only once or users can edit their content. Finally, forms can be dedicated to specific user groups or shared anonymously (*Uprawnienia*).
119_PKPEnergetyka_16_forms_edit.png

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• A virtualized environment with Windows Server 2012 and a separate MS SQL instance
Content Management Tools	• Elastic Intranet's Block Editor
Search	• Elastic Intranet's search algorithms and SharePoint Search
Analytics	• Elastic Intranet's stats reports

Mobile

The PKP intranet looks and works great on any screen size, so users can read news on the go, post questions during their morning commute, or find any coworker wherever they are. It's fully responsive and, thanks to content blocks, the layout fits the mobile screen perfectly and intranet content, no matter how rich, flows nicely, without gaps or horizontal scrolls.

Mobile access isn't limited to any area (except editing), so users get a full intranet experience on their mobile devices, tablets, and desktops. For now, the PKP team has decided not to invest in native mobile apps because the intranet is fully responsive out-of-the-box with Elastic Intranet.

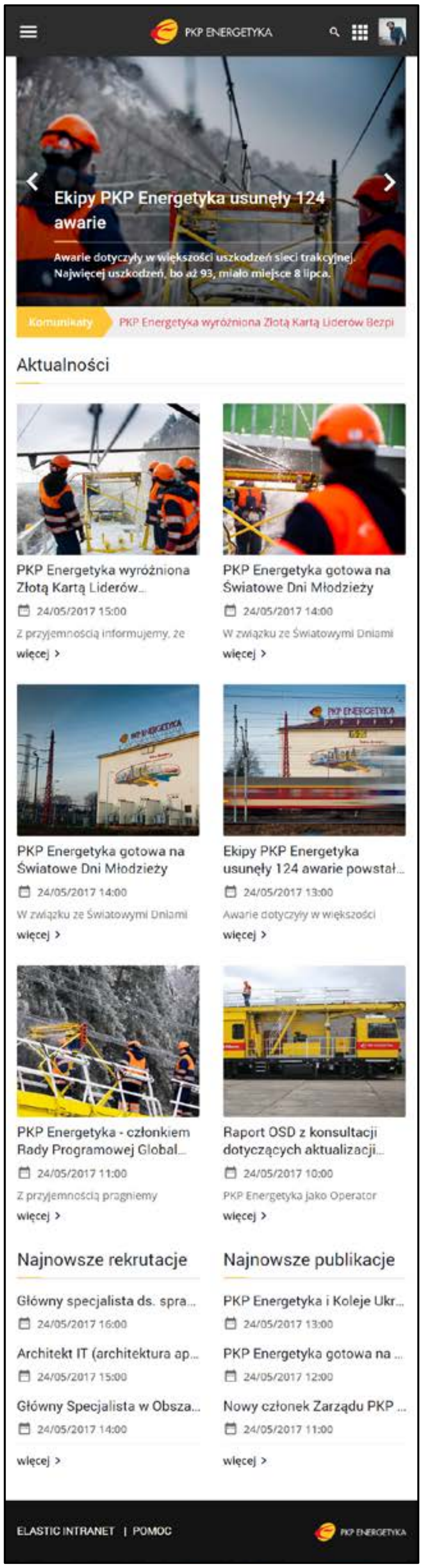


Image 120. PKP Intranet Mobile Homepage. The homepage looks great on any screen size and is optimized based on the best view for the content hierarchy.
120_PKPEnergetyka_17_homepage_mobile.png

ROI

PKP team members measure the popularity of specific page areas using page statistics, which helps them deliver engaging and valuable content. On a more global level, however, the new intranet has transformed how the organization communicates and operates. PKP is now able to engage employees, crowd source ideas, and communicate more directly with all employees. This makes the company more open, strengthens the corporate culture, and brings people together. With nearly 90% more staff using the new intranet daily (compared to the previous version), the organization can keep people informed, engaged, and connected, which ultimately helps it maintain a competitive advantage.

LESSONS LEARNED

The PKP intranet team shares some of the advantages it gained from choosing a turnkey solution for its intranet platform:

- **Saves time.** "The success of intranet deployment and adoption in our company comes from choosing a ready-to-go intranet product. Our previous communication portal was custom-developed from scratch, the process was long (seven months), and the final product had extremely low adoption and wasn't what we wanted it to be."
- **Provides a foundation of features out-of-the-box.** "We highly recommend using intranet-in-a-box products, which usually cover most of the common intranet use cases. Then, dividing a project into short sprints allows the company and agency to verify progress and publish changes or new modules to the production for testing, so the final product constantly evolves into the best solution possible."
- **Easy to extend.** "Having Elastic Intranet as a base for further extensions allowed us to deliver added features and functionality quickly, knowing right out of the gate how they would look and the interaction they would have as a base. Also, its easy-to-use content editor and beautiful, user-centered design allow even less experienced users to easily create and manage content, making the process seamless and fun. We encourage other teams to focus not only on front-end design, but also on choosing solutions that help intranet teams to easily manage content and engage the workforce."

Travelers Insurance

OVERVIEW

COMPANY

The Travelers Companies, Inc., is a leading provider of property casualty insurance for auto, home, and business. A component of the Dow Jones Industrial Average, Travelers has approximately 30,000 employees and generated revenues of approximately $28 billion in 2016.

Headquarters: New York, New York

Company locations: In addition to its main offices (in New York; Hartford, Connecticut; and St. Paul, Minnesota) Travelers has three customer service centers and 121 field offices. These operations are located primarily in the US and Canada, but also across the UK, Ireland, and Brazil.

Locations where people use the intranet: The intranet serves more than 30,000 employees in offices throughout the US, Canada, the UK, Ireland, and Brazil.

Annual revenue: Travelers generated revenues of approximately $28 billion in 2016.

THE INTRANET

Users: Travelers has a highly connected workforce. Virtually all employees — from desk-based employees to customer service representatives to mobile workers such as claim professionals — use a company-provided desktop, laptop, or mobile device as part of their daily routine.

Mobile approach: Responsive web design

Technology platform: DCM Opentext CMS and .NET application

TEAM

Executive Sponsors: Lisa Caputo, EVP, Marketing, Communications and Customer Experience; Madelyn Lankton, EVP and Chief Information Officer, Enterprise Operations and eBusiness

Leadership: Patrick Linehan, VP, Corporate Communications; Jason Galvin, VP, eBusiness

Redesign Lead: Jenn Renwick, Employee Communications; Jay Chin, eBusiness

Redesign Team: Ken Luurtsema, Scrum Master/TDL; Brian Bellino, UI; Amarjeet Kaur, .NET Developer; James Hartman, UX; Tom Nunes, UI; Michael Gammon, Search and CMS; Rebecca Finley, CMS; Jason Natelle, Project Support

Redesign Support: Gagen MacDonald; Accenture; Fjord

CONTENT TEAM

Enterprise Internal Communications: Andrew Turner and Annette Gunn

INTRANET TEAM

Team members shown here (top row, left to right): Patrick Linehan, Jason Galvin, Jenn Renwick, Jay Chin, and Ken Luurtsema; (2nd row, left to right): Tom Nunes, Rebecca Finley, Michael Gammon, Brian Bellino, and Amarjeet Kaur; (3rd row, left to right): Annette Gunn, Jason Natelle, Andrew Turner, James Hartman, and Amy Dietz; (4th row, left to right): Manishkumar Nire, Chandra Sekhar Reddy Sirigi, Ashoka Mahadevaiah, and Manavarthi Poorna Sasikanth.

HIGHLIGHTS ABOUT THIS WINNER

An intranet doesn't have to be overly fancy to be amazing. Sometimes the steady, discerning designs are the best fit and the most helpful for the organization. The Travelers intranet, named *inside*, gets the job done exquisitely, without a lot of fanfare.

- **Personalization and customization.** Rather than barraging employees with vast, unorganized content, the Travelers intranet feeds only the most relevant information to individuals based on business and location. Also, users can customize various content areas to meet their wishes. The homepage, news, and global navigation are some of the areas the intranet personalizes to the employee and it also allows him or her to customize further.
- **Tools.** *inside* brings users' tools and bookmarks to the foreground, so everything they need is at the top of the homepage or just a click away in the *My Links* menu.
- **News.** Many rich news articles enhance employees' knowledge about day-to-day and important corporate developments at the company. Keeping all employees apprised this way is important for engagement and alignment.
- **Mobile.** Travelers employees access the intranet on their company-managed mobile devices. The large population of mobile workers, such as claim professionals, especially appreciate the mobile capabilities. The site was built with a responsive design, and nearly all the features available on desktop are also available on mobile.
- **Searchable, editable employee profiles.** Finding the right person to collaborate with is half the battle at many organizations, but at Travelers, employees can add expertise and topics of interest to their employee profiles. Because this information is included in the intranet search, employees can find colleagues by searching for skills and interests in addition to contact information. Experts and people interested in the queried topic appear in results.
- **Department sections.** Finding the right individual for the job is critical. Likewise, knowing which department specializes in something you need assistance with — and how to make contact — is also imperative. Department sections, owned by the respective departments, include information that educates employees about the many kinds of work done at Travelers, and which teams can assist them in doing their work. This department information helps people collaborate effectively using the resources Travelers has to offer.

BACKGROUND

For more than a decade, the Travelers intranet, *inside*, was corporate-centric and failed to meet employees' varied needs. Poorly organized content and ineffective search made finding information inefficient and frustrating. To edit pages, content owners had to submit IT requests that could take up to six months to process. Site metrics were inconsistent and unreliable. But *inside*'s largest drawback was that it was one-size-fits-all — a single, enterprise-driven experience for a diverse workforce. As one Travelers employee put it, “There's so much information that's not specific to you, it's hard to wade through it and find what you need to know.”

The Enterprise Internal Communications team set out to create a user-centric intranet that more effectively helped employees find information relevant to their work, accomplish daily tasks, and achieve business goals. Very simply, it needed to change *inside* from an information repository to an intranet that enabled more effective and efficient access to and sharing of information. To do that, it focused on and delivered six key capabilities:

- **Mobile:** offer access on mobile devices, using responsive web design for easy access and viewing.
- **Search:** improve search functionality so employees can find information, people, tools, and expertise easily and intuitively.
- **Personalization:** create a personalized entry-point to the intranet based on business unit, role, location, and so on.
- **Customization:** offer customization, so that employees can choose the content most valuable to them.
- **Navigation:** provide more intuitive and concise navigation and organization.
- **Metrics:** gather accurate metrics to track views, search results, habits, and more.

After an 18-month journey to secure buy-in and budget, two agile development teams constructed the new *inside* in 10 months.

The improved intranet is currently available to US-based employees. International, multilingual versions of the site rolled out for Canadian employees in October 2017 and will be available for European employees in 2018.

Image 121. Travelers Insurance Intranet Legacy Homepage. This is the *inside* intranet's legacy homepage and what all US employees saw prior to the new US site launch in February 2017.
121_Travelers_01_HomePage_Version1.png

Image 122. Travelers Insurance Intranet Legacy Content Page. The legacy intranet did not lend itself well to customizable news pages. Content owners were limited by the template and often unable to format pages to meet their needs. *122_Travelers_02_ContentPage_Version1.png*

Homepage

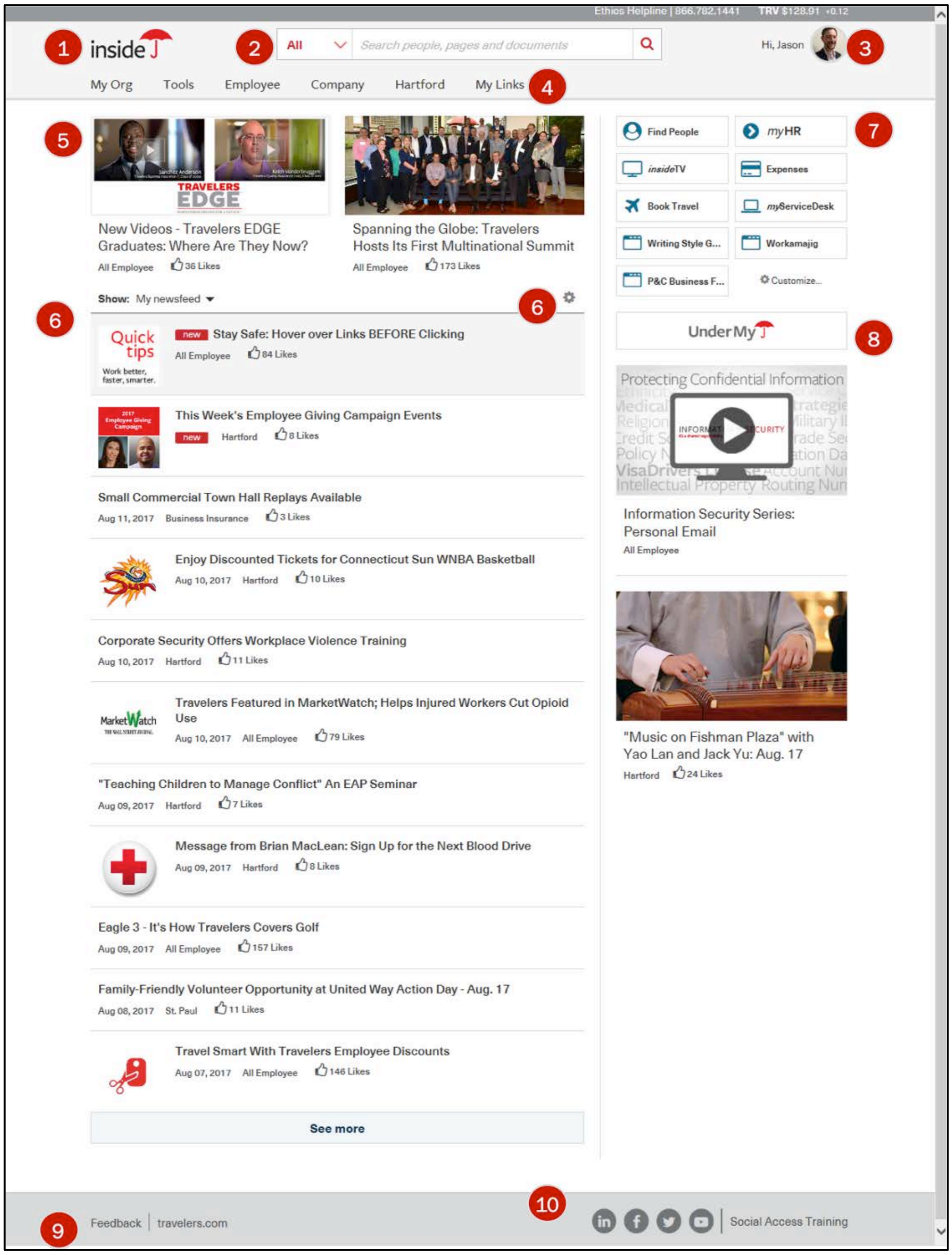


Image 123. Travelers Insurance Intranet Homepage. The news, links, and menu are personalized to the logged-in employee on the Travelers intranet. 123_*Travelers_03_HomePage_Live.png*

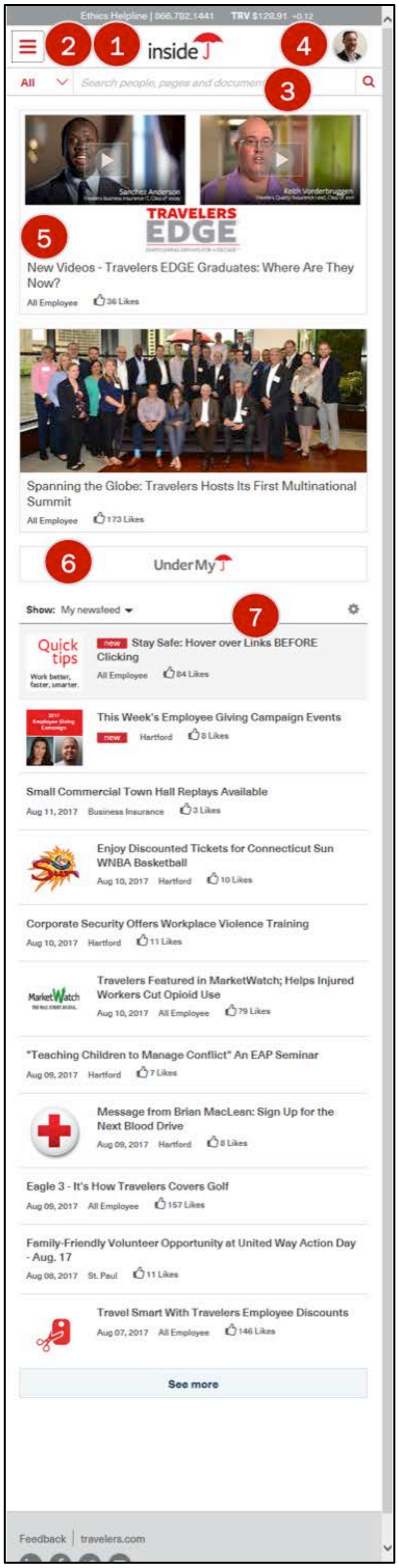
Homepage Highlights

The intranet's previous version was cluttered and information was hard to find; the homepage was one culprit. The new *inside* homepage design is clean and offers invaluable nuggets of information in neat compartments that are easy to scan.

1. **Logo.** The logo in the upper left of the homepage and all pages on the intranet confirm the intranet's name and is accompanied by the familiar red umbrella from the Travelers logo — and, with a click, it allows employees to go home.
2. **Search.** The search field in the center of the header is available on all pages of *inside*. Users can search different areas by choosing them in the drop-down list. Zeroing in on the places that search crawls not only makes search run faster, it makes results easier to deal with. The default choice for searching is *All,* which is best as some users are unsure about where to search and others may not notice the drop-down list. Users can filter results by type (pages, news, PDF, Excel, Word, and PowerPoint) and date (past 7 days, past 30 days, and past 6 months). The results that include people can be filtered by location, division, and department.
3. **Login.** A photo of the logged-in user appears in the upper right, along with "Hi [*name*]," to welcome the employee.
4. **Global navigation.** A subtle gray background and a thin, darker gray horizontal line separates the header, which includes the global navigation links, from the rest of the page. This is a nice effect that makes the header and navigation look important, but still easily falls into the background when the user begins scanning the page content. The user's location — here, *Hartford* — appears as the second-to-last link. This location-based navigation helps users find information related to their own, rather than all, locations. The *My Links* menu leads to the list of links related to the logged in user. Offering this personalized menu and the ability for users to further customize and add their own links is a great way to catapult employees to higher productivity levels.
5. **Featured news.** The featured news, including videos and other content, are awarded the top space in the homepage content area. The space on the left is designated for all-employee news, while the space on the right has news related to the employee's designated business unit. If the business unit does not have news content, an all-employee story populates. This gives business unit content owners flexibility as to when they publish content and ensures only the most pressing stories are featured at the top of the page. These news items include a headline, a related image, the number of likes, and the intended audience.
6. **Personalized and customized news.** Below the featured news are news stories and promotional content based on the user's role and location. Users can also choose to subscribe to up to 15 news sources using the gear icon in the upper right of the newsfeed area. These

subscriptions help people stay up-to-date on information they need and want, and they can be customized immediately. Articles in the newsfeed also include a headline, an image (sometimes), the number of likes, and the intended audience. Each item is dated in an international format, spelling out the month and using all four digits for the year. A red "new" icon appears by recently published stories, flagging the freshest content. The *See more* bar at the bottom of the section leads to more news stories compiled by search in chronological order with brief synopses.

7. **Quick links.** At the top of the homepage's right rail is a section with links to tools, which keeps the user's most frequently used tools and applications handy.
8. ***UnderMyUmbrella*.** The *UnderMyUmbrella* button leads to an employee-only app that hosts the CEO's blog**.**
9. **Feedback.** Because it is always interested in employee feedback, the intranet team included a *Feedback* link at the bottom of every page.
10. **Social.** Icons for the Travelers' social channels appear in the bottom right of the page. All employees can access these channels after taking social media access training. A handy link, *Social Access Training,* helps interested users get there.



Home, Mobile

Image 124. Travelers Insurance Intranet.
When accessed on a mobile phone, the site flows and section sizes adjust to create a pleasant experience.
124_Travelers_04_MobileHomePage_Live.png

Home, Mobile Highlights

Mobile access is important for many Travelers employees. But for a select set of employees, such as claim professionals, who work primarily on the road, the responsive mobile site was an especially big prize. All users can access the intranet using their company-managed mobile device. *inside*'s homepage is the default page when users open the AirWatch browser.

The responsive design reprioritizes content and adjusts the layout so that it flows well on mobile. In a few cases, content that appears on desktop doesn't appear on mobile. For example, the desktop homepage's frequently used tools section links mostly to third-party applications that are not mobile enabled, so it doesn't appear when accessing *inside* on a mobile phone.

1. **Logo.** As on the desktop, on mobile, the *inside* logo confirms the site that users are on. In the mobile layout, however, the logo is centered to make room for the menu icon.
2. **Global navigation icon.** The global navigation menu is collapsed in a hamburger icon in the upper left to save screen real estate for content.
3. **Search.** The wide search field and accompanying scoping drop-down list are dealt a prominent space on mobile.
4. **User image.** To confirm that users are logged in, a small image of the user appears in the upper right.
5. **Focal videos and news.** The same featured news items, including videos, cover most of the homepage above the fold.
6. ***UnderMyUmbrella*.** The *UnderMyUmbrella* button leads to an employee-only app that hosts the CEO's blog**.**
7. **Newsfeed.** As on desktop, news is personalized to and customized by the user. It appears in a single column, making it easy for users to swipe and sample the list of items.

News Customization

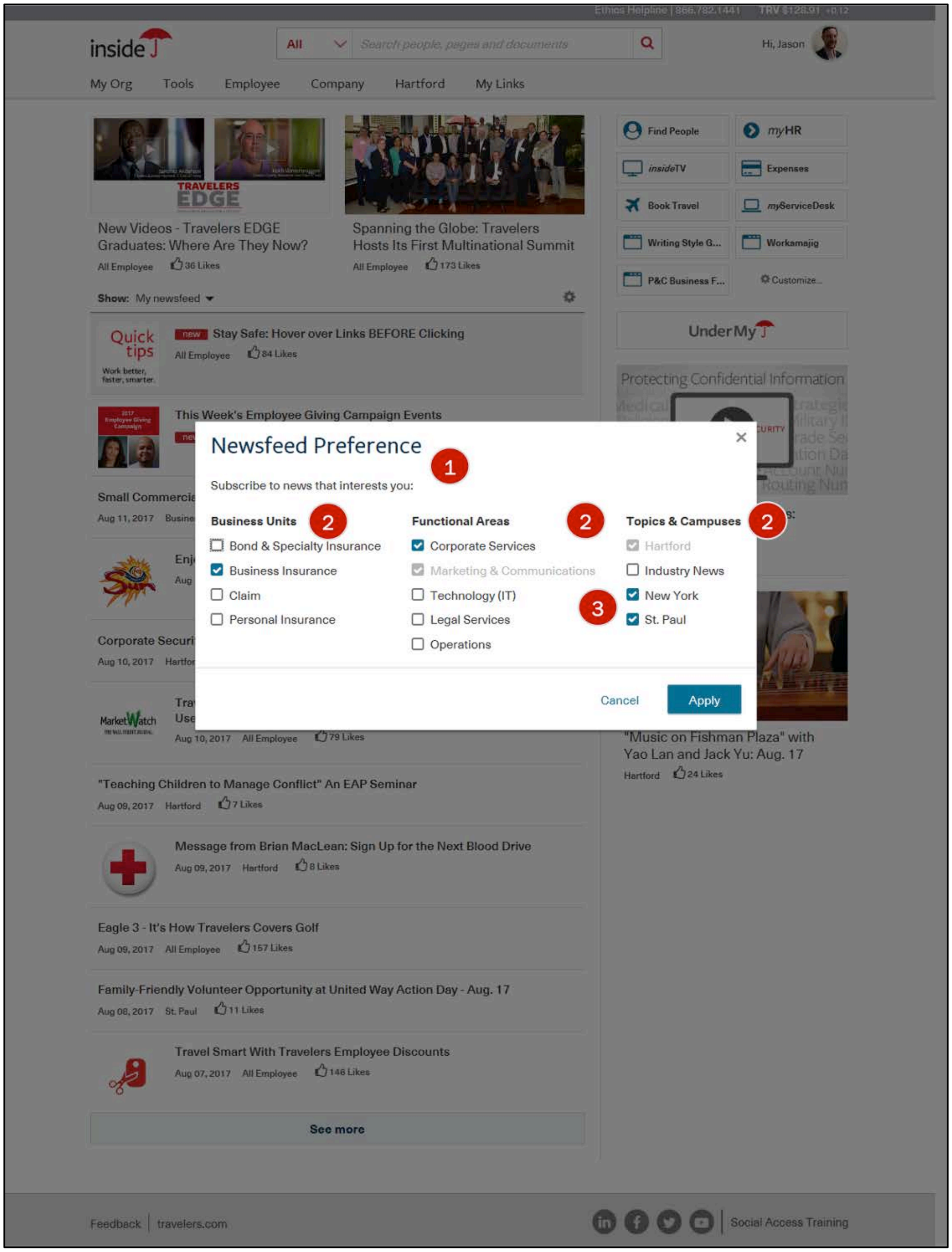


Image 125. Travelers Insurance Intranet News Customization. Employees can subscribe to and unsubscribe from news topics as easily as clicking checkboxes. *125_Travelers_05_NewsfeedCustomization_Live.png*

News Customization Highlights

Clicking on the gear icon just above the newsfeed lets employees easily access settings for customizing their news.

1. **Title and instruction.** The title of the modal dialog communicates that users can change their news preferences here. The note below the title — *Subscribe to news that interests you* — suggests to users what they should do.
2. **Headings and columns.** When presenting several items to choose from, the chunking principle is always a great way to help users assess their options. The column headings help users evaluate the lists of items.
3. **Checkboxes.** Changing the color of selected checkboxes to the branded blue is a nice added touch. The standard checkmark icon is also present.
4. **Gray items.** Grayed-out news items indicate topics that the user has been automatically subscribed to based on his/her role. This is a good way to prevent people from accidentally unsubscribing from information feeds they need.

Editing My Links

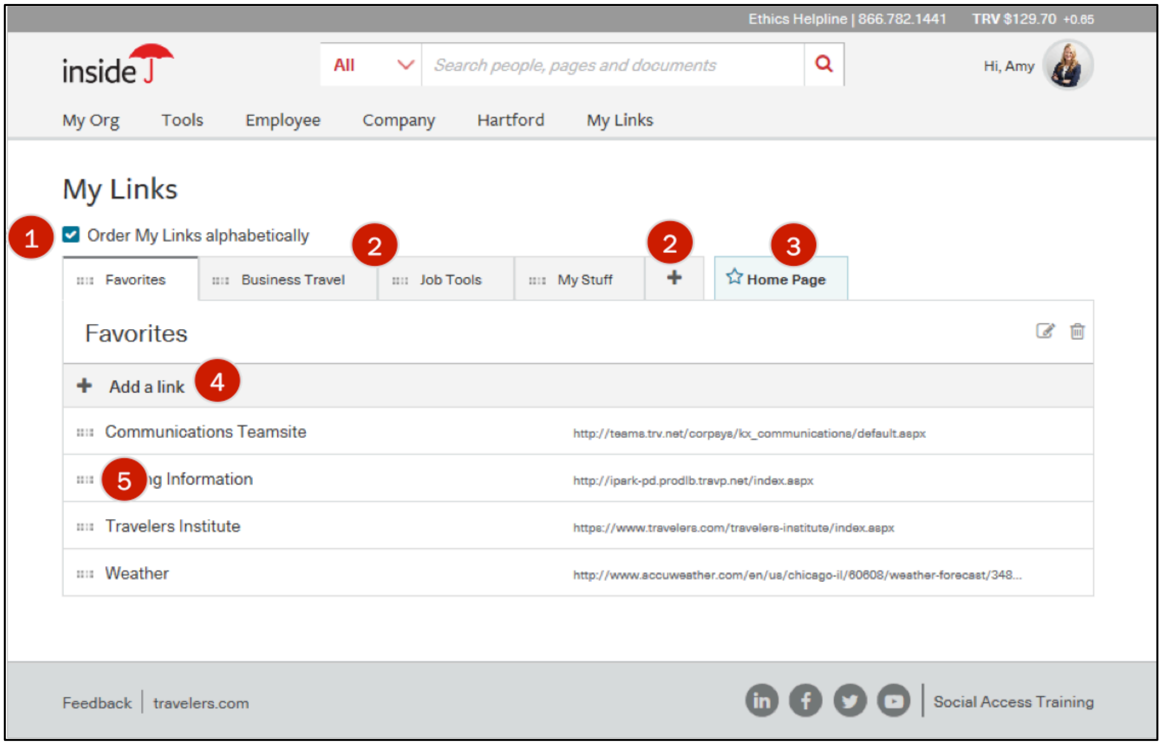


Image 126. Travelers Insurance Intranet Editing My Links. Employees can add and organize their links on the intranet, making it fast and easy to find the pages and apps they need. *126_Travelers_06_MyLinks_Live.png*

Editing My Links Highlights

With *My Links*, the user's bookmarks are available from any intranet page. Employees can edit the links that will appear and the subcategories in which they will appear in the global navigation's *My Links* menu. In the new design, editing links is a straightforward process, and the new intranet offers more robust categorization capabilities than the previous design.

1. **Order.** The *Order my links alphabetically* checkbox is a nice feature that helps keep links organized and easy to find. When selected, the links are automatically sorted by name from a to z.
2. **Categories.** Instead of simply allowing users to create links in the global navigation, designers took things to another level by letting users create categories for their links. The first five tabs are categories users can create in global navigation under the *My Links* menu. To create a new category — and up to five total — users simply click the plus-sign icon.
3. **Homepage links.** In this same interface, via the last tab, labeled *Home Page,* users can add, edit, and remove up to five links that appear in the upper right of the homepage. This gives users quick access to the apps and pages they need for their work.
4. **Add.** Employees add links by clicking the plus-sign icon labeled *Add a link.*
5. **Drag-and-drop.** Users can easily move a bookmark to a new rank within the list or to a new category, including the homepage, using a drag-and-drop feature.

Megamenu

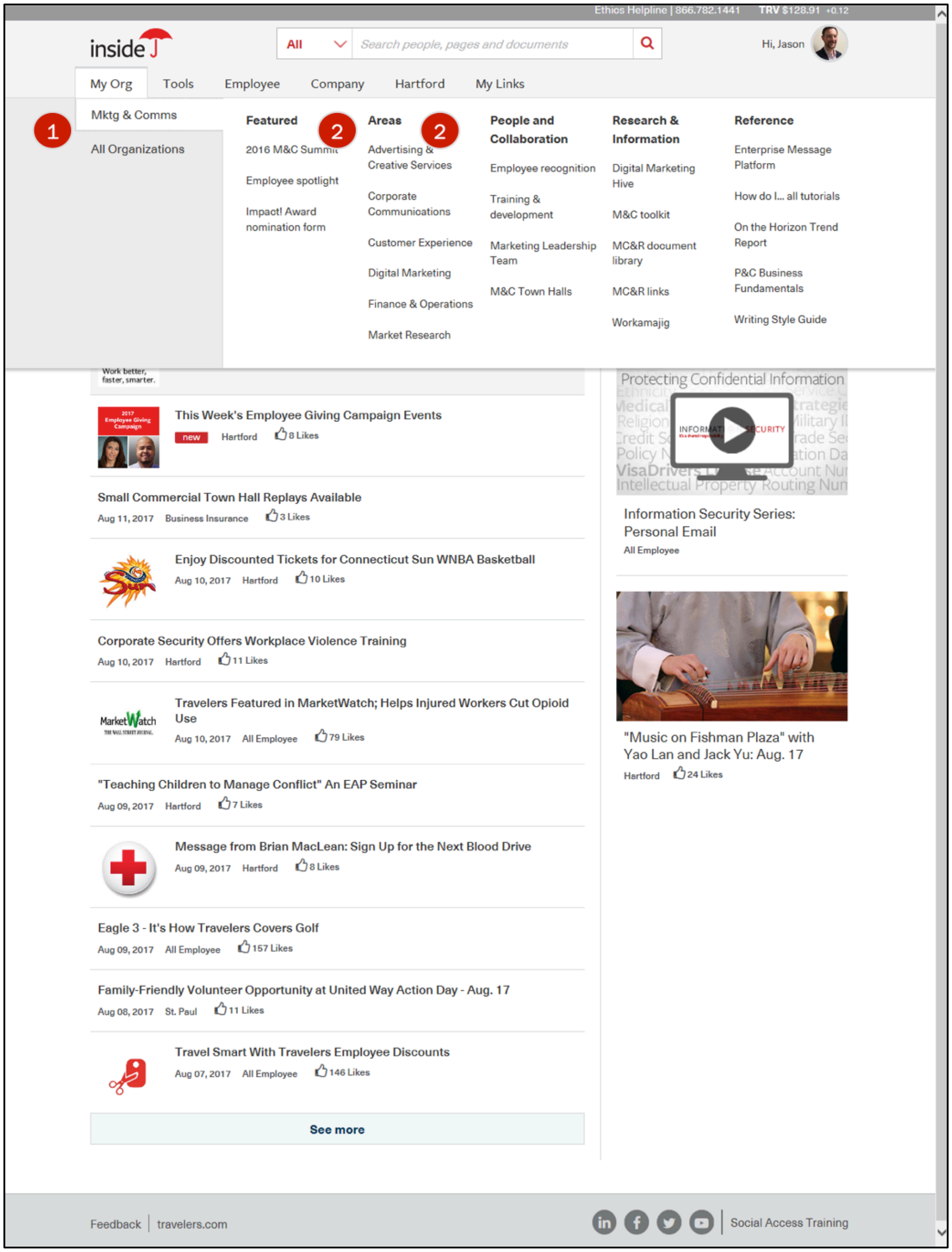


Image 127. Travelers Insurance Intranet Megamenu. Megamenu links are displayed based on the user's role. *127_Travelers_07_Navigation_Live.png*

Megamenu Highlights

The megamenu displays many links at once, well organized in columns and sections. The menus are personalized based on business unit, suggesting the most pertinent intranet areas for each user.

1. **Sections.** Within the global navigation, some items have a second navigation tier in the tabs on the left. The navigation is dictated by the user's role and impacts which links show in the menus. For example, under the main *My Organization* menu, this logged in user sees the *Marketing and Communications* menu because that's the team on which he works. He also sees the *All Organizations* menu, as is true for all users. This approach lets employees see information about all Travelers organizations, but with their own organization most visible and accessible.
2. **Columns with headings.** To make it easy to scan the megamenu's many links, the links are organized into five columns. Each column has a bold, descriptive heading.

Mobile Menu

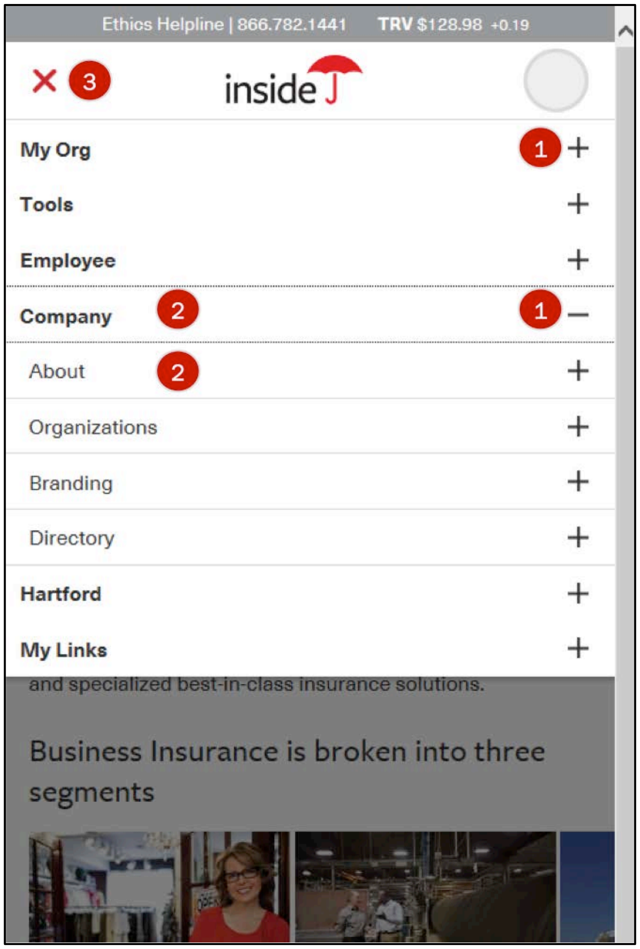


Image 128. Travelers Insurance Intranet Mobile Menu. The global navigation links are mimicked on mobile, but arranged in an accordion list that is easier to interact with on mobile. *128_Travelers_08_MobileMenu_Live.png*

Mobile Menu Highlights

The same top-level navigation topics on desktop appear on mobile, but the mobile menu flows vertically instead of horizontally.

1. **Expand and collapse.** The menu sections are collapsed by default, saving space but still describing the types of links available. Users can click the icons to open and close them. The plus-sign icon indicates a menu can be expanded, while a minus-sign icon indicates the menu is already expanded and can be collapsed. This is a simple but helpful use of icons: both are standard visual indicators that represent the action that will occur (vs. the menu's current state) when the user clicks them.
2. **Sublinks.** Tier-two menu items appear as normal text, while tier-one items are in bold. This difference helps users sense the menu's hierarchy. Tier-two items are also slightly indented, which further indicates their subordination to the outdented items. As with the desktop megamenu's column headers, users can have up to five second-level items in each menu on mobile.
3. **Close.** The global navigation is collapsed by default on mobile to make space for content. Once opened, users must be able to close it to see the content behind it. Clicking a red "x" icon achieves that.

Employee Profile

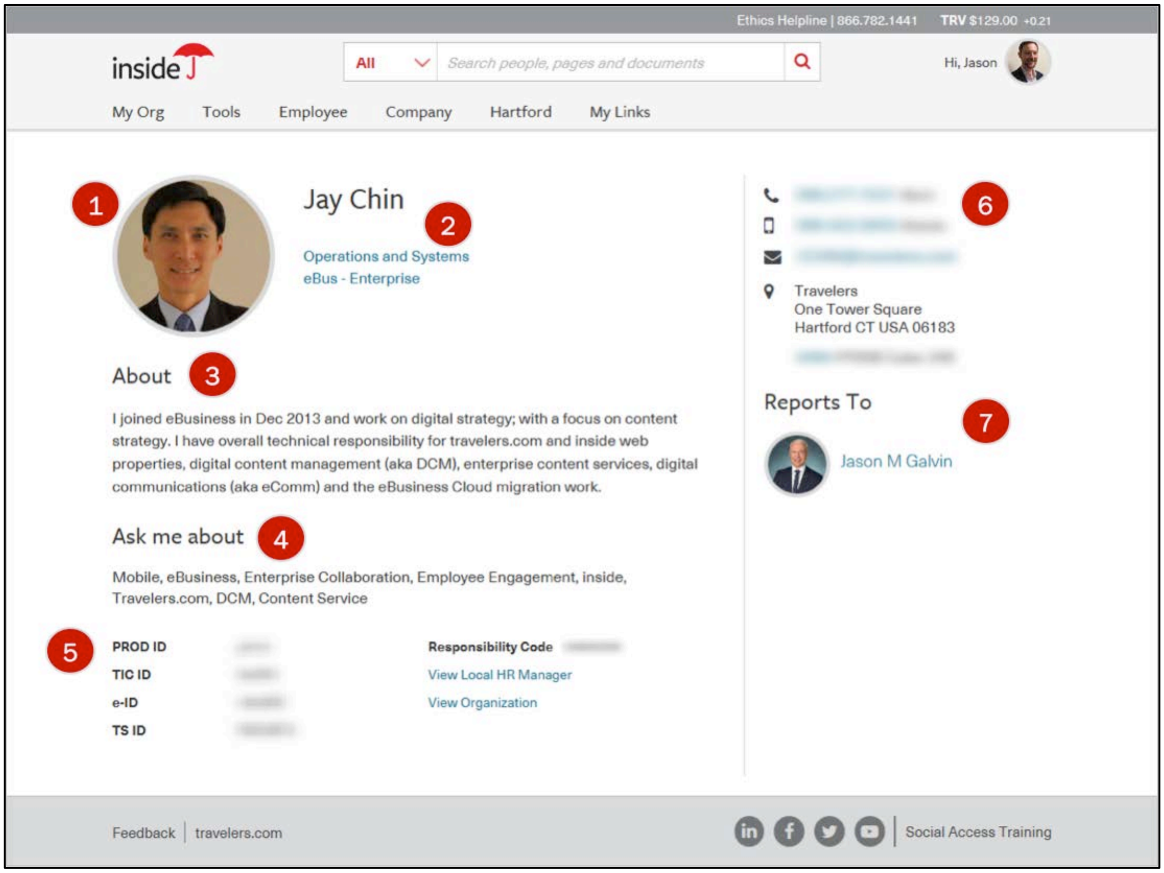


Image 129. Travelers Insurance Intranet Employee Profile. Employees add information about themselves, such as topics they are proficient in, making it easy for all employees to search for people with particular skills on the Travelers intranet. *129_Travelers_09_Profile_Live.png*

Employee Profile Highlights

Employee profiles are the mainstay of many intranets because they help employees find, contact, and learn about one another. Apps, forms, and news are important, but Travelers intranet designers are well aware that it is the people resources make the organization run.

1. **Photo.** A clear, professional photo helps colleagues put a face to a name. Employees can choose their own profile picture to ensure they are comfortable with the photo put out for all of Travelers to see.
2. **Name and organization(s).** The person's name appears in large print, and the organizations where he or she works appear just below that.
3. ***About*.** Because so many people have a public LinkedIn profile and other social pages on the web, it only makes sense that employees write their own professional statement on their organization's intranet. Users provide this content for the *About* section toward the top of their profile.
4. ***Ask me about*.** Like the *About* section above it, employees write their own *Ask me about* sections. This section is a great icebreaker, as employees can choose topics they feel well versed in — or at least very interested in discussing. The label for this area is also a call to action, summoning employees to communicate with one another. Also, because the employee profile pages — including the user-edited content — are searchable via the site search, employees can easily find each other based on the affinities that people include in their profile document.
5. **Details.** Technical IDs and other detailed information appear under the *Ask me about* section. While important, most employees don't need to see this information about their colleagues, so it appears at the bottom of the page, where it is out of the way but still findable.
6. **Contact.** Users can easily find the contact information in the right column, including the person's landline, mobile phone number, email address, and office location.
7. **Manager.** A photo and the name of the person's manager appear under the *Reports To* heading. Clicking the name opens the manager's employee profile.

Department Page

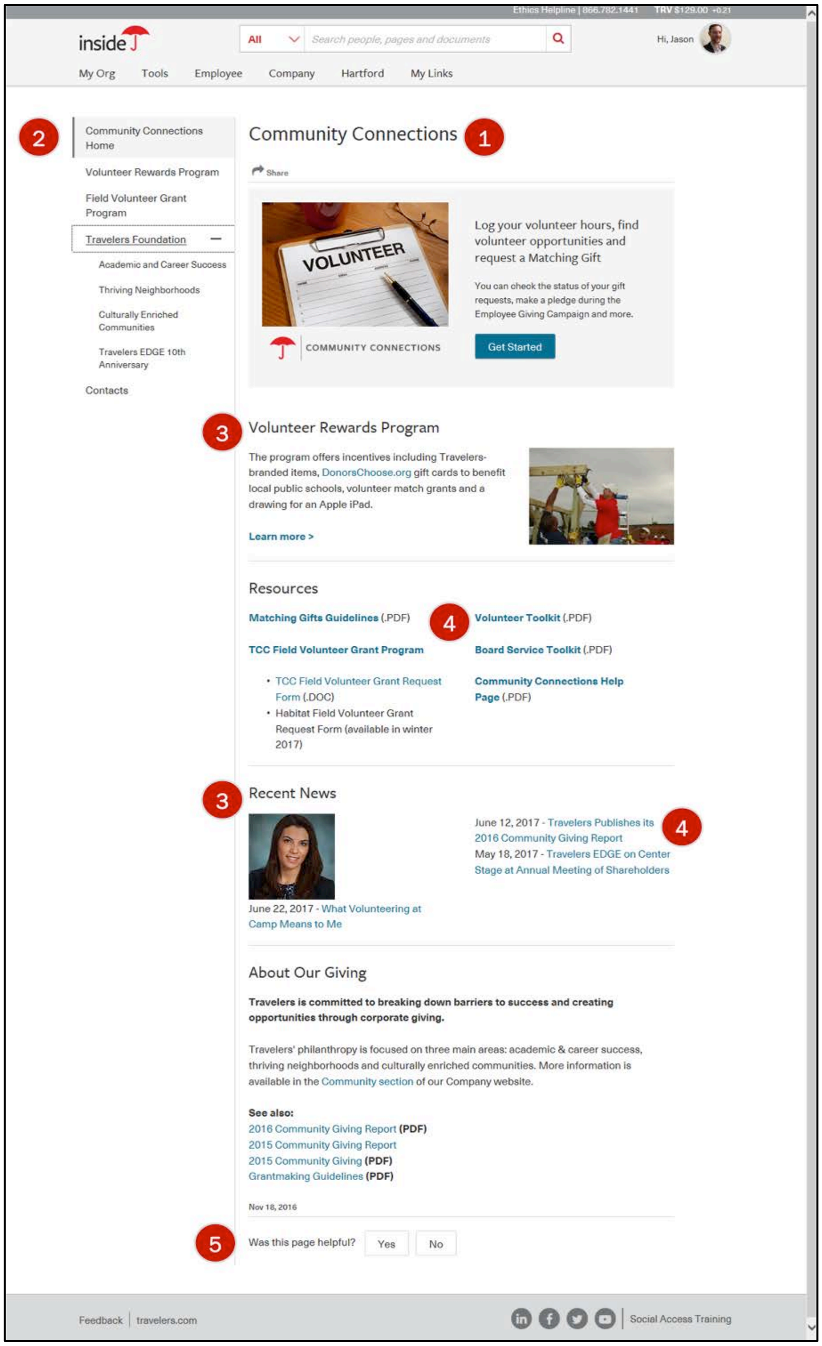


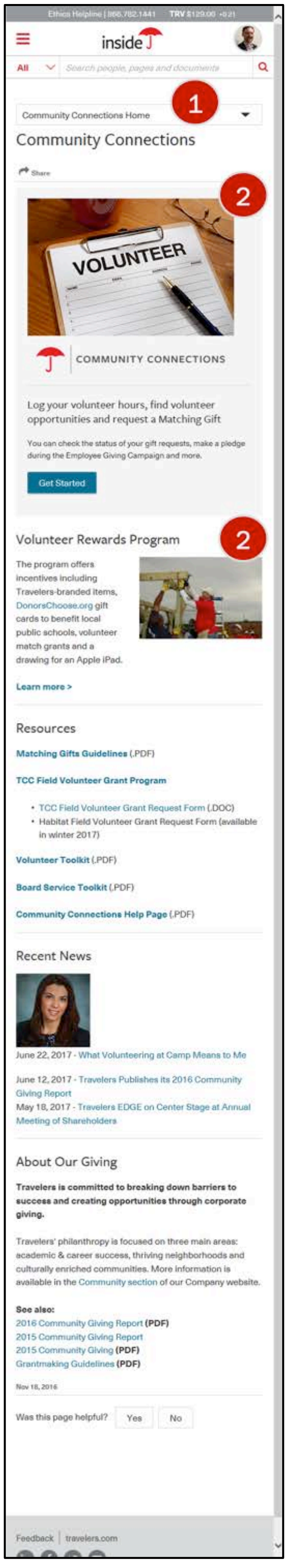
Image 130. Travelers Insurance Intranet Department Page. Through the intranet's many department sections, employees can learn about what various teams do and what services they offer.
130_Travelers_10_DepartmentPage_Live.png

Department Page Highlights

Each department has an intranet section that educates or reminds colleagues about what that department does and the services or information it offers. These sections help employees truly get a sense of their coworkers' roles and how Travelers ticks.

Departments are responsible for the content on their subsite, which means each department can express whatever they feel is most important to convey to Travelers employees.

1. **Title.** The large, dark gray text stands out at the top of the page, indicating the department's name.
2. **Context menu.** The links in the left-side navigation lead to pages within that department's section. The department's main (or *home*) page is first in the list.
3. **Content.** Page content is arranged in sections, each with a subtitle that users can scan to. Pages have plenty of information, but remain uncluttered. The high-priority items have a prominent section at the top of the page and include a large image.
4. **Links.** The links appear as blue text, which makes them stand out against the white page background and contrasts with the standard black text. Links that open files, such as PDFs or Word documents, show the file-type abbreviation after the link. This nicety sets the users' expectations, so when they click the link they are not surprised when a different document opens instead of an HTML page.
5. **Feedback.** At the bottom of each static page is a question: *Was this helpful?* Content and site owners use people's responses to help determine when content should be edited or removed.



Department Page, Mobile

Image 131. Travelers Insurance Intranet Department Page, Mobile. Content on department pages is formatted in a single-column layout when viewed on a mobile phone.
131_Travelers_11_DepartmentPageMobile_Live.png

Department Page, Mobile Highlights

1. **Context menu.** The left-side context menu is collapsed in a drop-down list at the top of the page.
2. **Layout.** The content flows in a single-column layout that's easy to digest when reading on a small screen. Text is legible because of the typeface, size, and high contrast between the text and the page background.

Was This Helpful? (“Yes” Response)

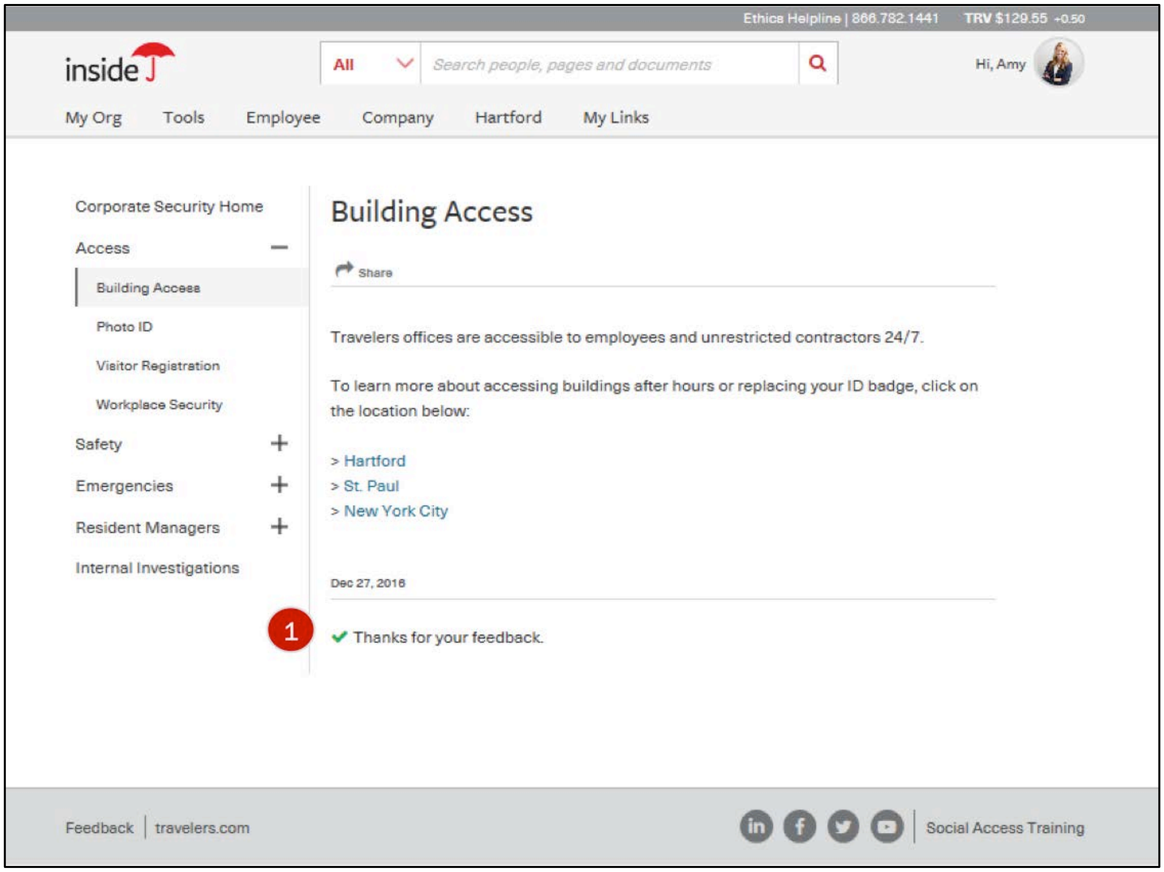


Image 132. Travelers Insurance Intranet Was This Helpful? (“Yes” Response). This confirmation shows that the “Yes” response to the *Was this helpful?* question was sent. *132_Travelers_12_WasThisHelpfulYes_Live.png*

Was This Helpful (“Yes” Response) Highlights

1. **Feedback.** After a user clicks the *Yes* button following the *Was this helpful?* question, the area where the question had appeared is replaced with a green checkmark and the confirmation message: *Thanks for your feedback.* Content owners receive an email when a user clicks “yes.”

Was This Helpful ("No" Response)

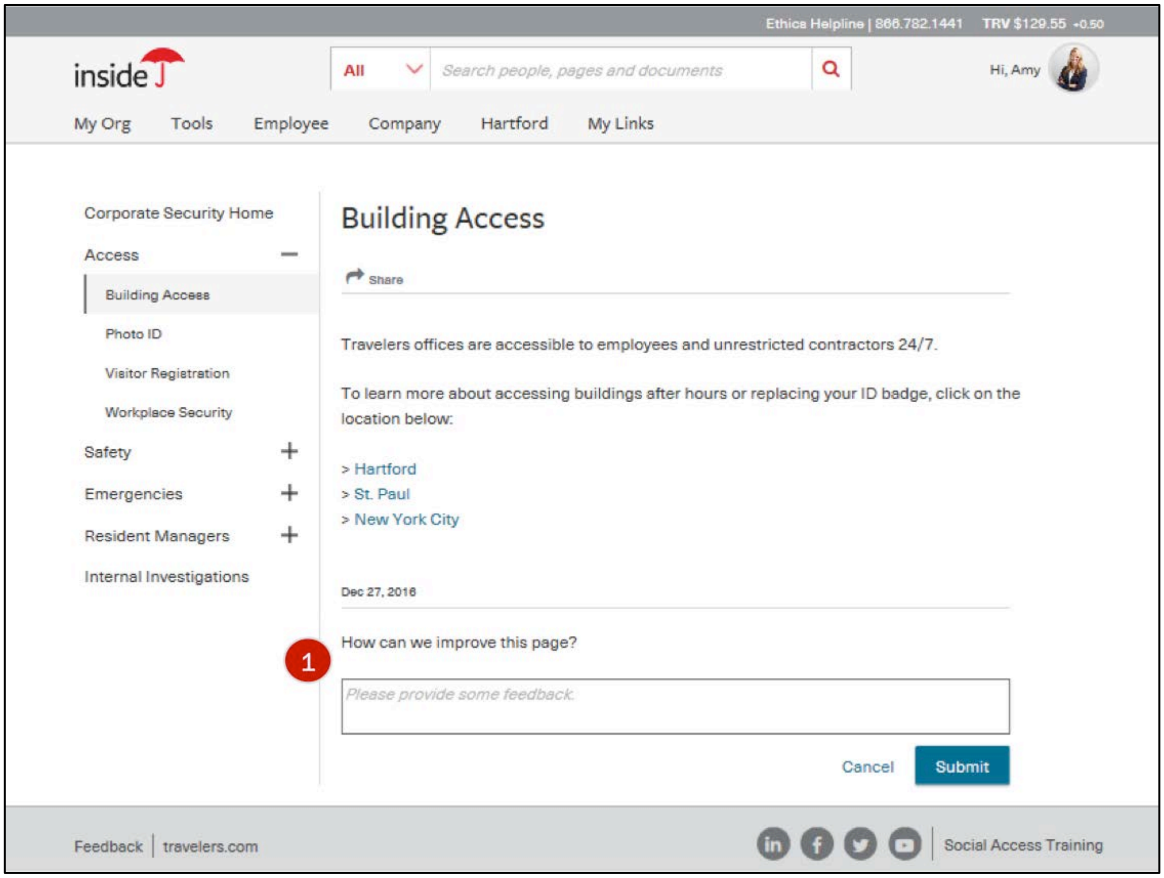


Image 133. Travelers Insurance Intranet Was This Helpful ("No" Response). A response of "No" to the *Was this helpful?* question asks users to suggest how the page could be improved.
133_Travelers_13_WasThisHelpfulNo_Live.png

Was This Helpful ("No" Response) Highlights

1. **Feedback.** If a user clicks the *No* button following the *Was this helpful?* question, the area where the question had appeared is replaced with another question, *How can we improve this page?*, followed by a field to write comments. Content owners receive an email, including the name of the person commenting, so they can follow-up directly with that employee.

Article

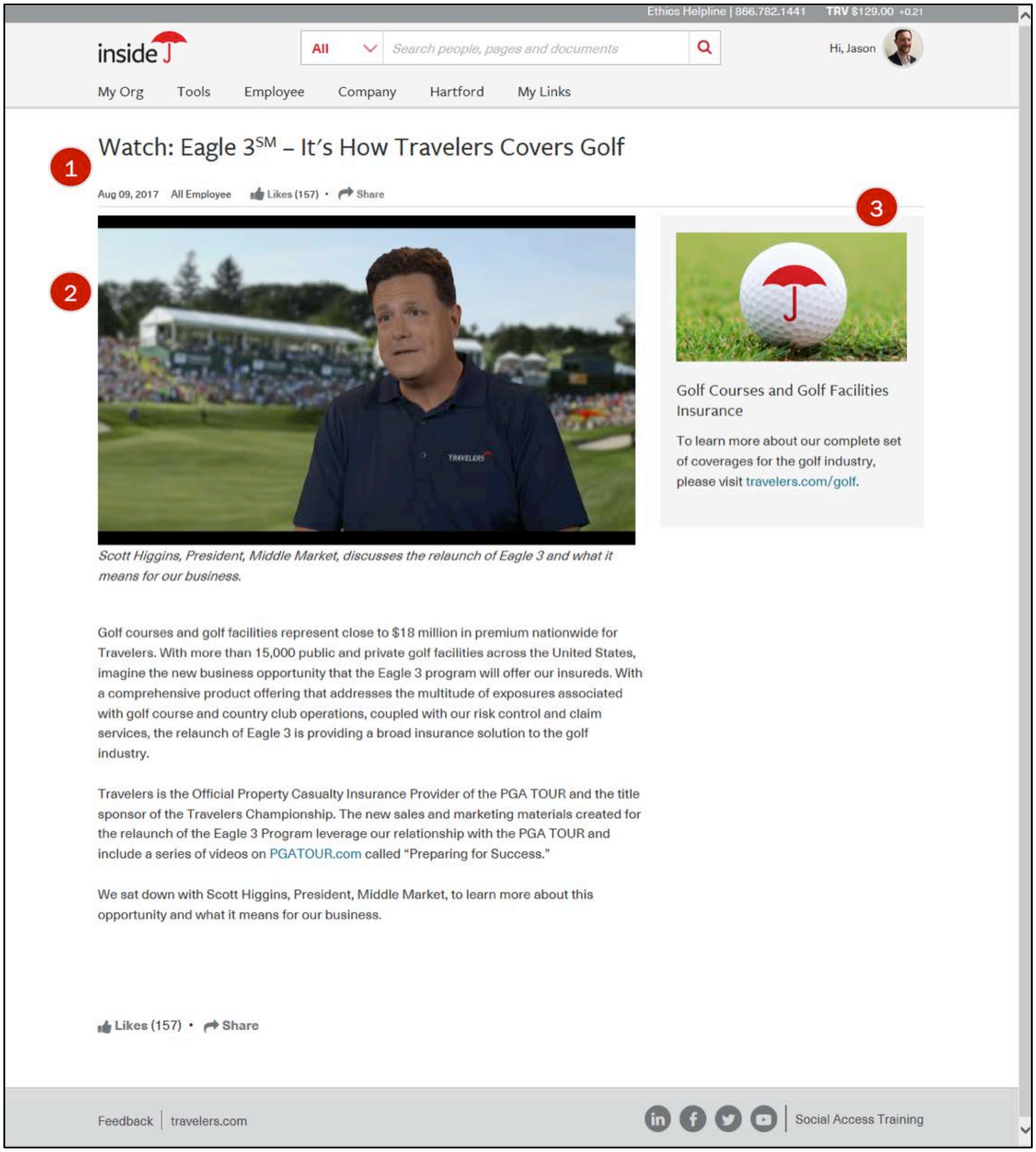


Image 134. Travelers Insurance Intranet News Article. News items are abundant on the Travelers intranet, keeping employees up-to-date.
134_Travelers_14_ContentPage1_Live.png

Article Highlights

To keep employees apprised of company news and events, news pages offer text, video, images, and related links.

1. **Information.** The article's title, date (in an international formal), number of likes, and the share feature all appear near the top of the page.
2. **Image.** A large, engaging image that is closely related to the news item appears at the top of the story.
3. **Right rail.** The right rail can display images, video, calls to action, and other engaging features.

DESIGN PROCESS AND USABILITY WORK

At the start of business case design, the Travelers team enlisted Gagen MacDonald's support to help them understand best practices and trends in intranet design and strategy. Intranets are not an easy thing to research, so they felt it was important to have a partner with insight into what's working at other large, complex organizations.

Reaching Out to Users

Team members conducted focus groups and 1:1 interviews with employees to document Travelers employees' unique intranet needs and preferences. Through this process, they spoke with a diverse mix of employees — across varied businesses, roles, and tenures — to get a holistic view of the existing site's limitations and how a new platform could help them be more productive, efficient, and engaged. From the feedback the team received, it developed four employee personas that served as a strategic document to guide requirements writing and design. It also shadowed employees as they used the site to validate these findings.

Throughout design and development, the team took a highly collaborative approach to ensure that the site meets employee and business needs. With that collaboration goal in mind, it convened a cross-functional team of IT partners, communicators, and other business stakeholders to review where they were and get feedback on the team's mood boards, wireframes, and initial site designs. This informal testing approach ensured that the team was on the right track, while not burdening employees with excessive testing and surveying.

The one design piece that the designers tested with all employees was the proposed global navigation. Using the legacy intranet homepage, they invited employees to complete a card-sort exercise using the key terms that had to be accessible on the intranet. They used these results to inform the global navigation's design.

Information Architecture

Search and an improved IA were the project's top priorities. Information on the old site was poorly organized and made finding information frustrating and time consuming. Often, content was housed under the organization that owned it; for example, facilities requests could be accessed by clicking on "Real Estate," which wasn't intuitive for most employees.

To address this shortcoming, the team began with a thorough content-evaluation exercise, working with more than 30 content owners to determine what among the 14,000 pieces of content would be kept and what deleted during migration to the new site. The designers knew that the sheer volume of outdated or irrelevant pages was contributing to the information-finding problem; conducting this exercise let them reduce content by more than 50%. They then organized the content marked as "keep" into logical buckets of information to model the new intranet's folder and URL structure.

For the global navigation, the team created a stronger, task-based structure that more closely resembled the way users would phrase requests. It then conducted a card sort, followed by two rounds of usability testing to ensure it was exactly right.

Adoption and Buy-in

The Travelers team had to secure adoption and buy-in from two critical audiences: all employees and the business communicators.

Based on what it had learned in creating employee personas, team members knew that Travelers employees already used and accessed *inside* as part of their regular business routines, but the designers wanted employees to understand the new site's added benefits and features. They also wanted users to understand that the significant improvements were designed with them in mind, and that they could provide feedback to continue shaping the site. Coordinated communication and change-management efforts, in partnership with Gagen MacDonald, were critical to this effort.

The Enterprise Internal Communications team drafted and issued launch communications centered on four key features of the new site: personalization, improved search, mobile access, and customization. These communications were not only pushed out through the all-employee news source, but reinforced by business/functional messaging as well. Over the first two months following launch, the team also wrote and posted six feature articles about enhancements, maintaining a regular drumbeat of reminders about site capabilities.

In addition to launch communications, the team implemented tour functionality on the home and profile pages to highlight new and improved features. The tours appeared when users first logged in, and they were given the choice to: take the tour, receive a reminder at a later time, or never see it again. As of this writing, more than 15,000 users have completed the full homepage tour and 5,312 have completed the employee profile tour. Also, when new site features are added, the team adds tours to highlight what's new.

Although all employees were a critical audience, business communicators were even more critical stakeholders. Personalization was a priority feature of the new site, but without content to populate it, the site would fall flat and remain corporate-centric. Team members thus began building this relationship during the earliest days of scoping and requirements writing and all throughout design. In addition to conducting intake with communicators about their needs, the team also established an Intranet Communications Council (ICC), made up of all business and functional communicators. The ICC served as an advisory committee throughout the build, meeting monthly to review progress, make key decisions, and discuss what was required of it. This committee continues to meet to this day on enhancements, metrics, and content strategy.

Some communicators were initially intimidated by the homepage's dedicated space for the function they supported — and the expectation that they fill that space. However, usage has increased every month since launch, with business units and functions posting an increasing amount of personalized content for users through their dedicated news sources. The Claim Communications team has even used the site to relocate a twice-weekly email newsletter and to expand its content to be more locally relevant.

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Gagen MacDonald	Partnered with the Enterprise Internal Communications team to closely collaborate throughout scoping, design, build, and launch. Activities included: • Created user personas to inform site design • Developed detailed stakeholder analysis • Provided trends, insights, and best practices in intranet design and strategy • Designed business case presentation for socialization with key audiences • Designed IA and site taxonomy • Drove content evaluation, migration, and CMS training efforts • Created site guidelines and training materials • Drafted launch communication and change-management plan and materials • Informed site metrics report and designed user survey
Accenture	• Served as second Agile development team (offshore) on US site launch to speed delivery time • Augments onshore development team staff
Fjord (Design & Innovation from Accenture Interactive)	• Created user journeys and story mapping • Conducted card sort to help guide IA design • Developed mood boards and site wireframes

GOVERNANCE

Ownership

Enterprise Internal Communications, which sits within the Marketing & Communications organization, is the intranet's primary owner. The intranet is supported by eBusiness, which sits within the Technology function. Enterprise Internal Communications oversees site strategy and content, and was the initiator of the new intranet project. eBusiness is responsible for all of the site's technology aspects and leads their development.

The two teams have coordinated closely throughout *inside*'s history, from the legacy site through the build phase and the new version. In the Agile model, Jennifer Renwick, Senior Director, Internal Communications, serves as product owner, working daily with the development teams to set priorities and ensure execution.

Together, these teams have collaborated successfully to ensure the site is meeting employee needs and expectations.

Decentralized Governance

On the previous version of *inside*, businesses had to issue requests to publish their content. In some cases, simple changes to pages could take up to six months to be completed; requests for new functionality or something complex took even longer. The intranet now puts control back in the users' hands through a decentralized governance model.

Today, nine business unit and function communication teams lead their own *content* strategies, creating and personalizing homepage news and information. This approach more effectively anticipates user needs, gives users relevant information, and removes inefficiencies and unproductive competition. It has also resulted in a reduction of one-off email communications. The new intranet design lets authors control their navigation in the global mega-nav and in the left rail navigation within subsites. Authors can also publish and link to videos without IT intervention. These changes have decreased the time and resources IT needs to manage simple changes.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Redesign Lead	• Spearhead redesign efforts, including business case creation and socialization, requirements writing, design, and execution • Coordinate with leaders and key business stakeholders to ensure buy-in and alignment • Act as product owner on the Agile development team
Corporate Content Team	• Manage content strategy and editorial calendar for all employees enterprise-wide • Work with business/functional teams to ensure a regular cadence of engaging content • Support content migration, training, and new content owners
Business/Functional Content Teams	• Create news and content personalized to their business unit/function • Drive promotion and adoption within business unit/function • Participate on ICC to influence the site's overall design and direction
Content Owners	• Keep static, non-news pages updated
Technical Development and Support	• Lead development of new intranet • Drive ongoing creation of new features and functionality as determined by product owner • Provide thought leadership and counsel on UX and interface

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	http://inside.here.travp.net/
Default Status	*inside* is set as each user's homepage on Internet Explorer and Chrome. Users cannot change the setting.
Remote Access	Users can access the site via company-managed devices, including laptops and mobile devices. Mobile devices require AirWatch to access the site.
Shared Workstations	Some employees in call centers share workstations across multiple shifts.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
Unknown	• Intranet history prior to 2008 is unknown due to a complex history of mergers
2008	• First iteration of what is now legacy *inside*
2011	• Minor visual redesigns of homepage
September 2014	• Planning for new intranet begins with Gagen MacDonald
2015	• Minor visual redesigns of homepage
December 2015	• Business approval and funding achieved
April 2016	• Development begins
February 2017	• *inside* US launches
March–September 2017	• Release monthly US site enhancements
October 2017	• *inside* Canada launches
2018	• *inside* Europe launches
Overall redesign timeframe: 2.5 years	

CONTENT AND CONTENT CONTRIBUTORS

Content Managers

Three people in the core content team (Enterprise Internal Communications) manage content related to all employees and the US site.

Approximately 15 business communicators manage personalized news content for their users, and more than 80 additional people create, review, or approve content.

Culling Content

A primary problem with the former site was its outdated and irrelevant content. It bogged down search results, created a messy IA, and was the underlying cause of most of the UX frustrations. When the company set out to redesign the intranet, it made a goal to delete at least 50% of the site's content.

When the intranet team audited the legacy site, it found more than 14,000 unique pieces of content — pages, documents, and images — that had no metrics on date created or last updated. The team therefore had to ask each individual content owner to mark his or her content as "keep" or "remove," and gave clear guidelines on each category's attributes. The team also reminded the owners that they not only had to migrate every page to the new system, but they also had to maintain all content annually in keeping with the new governance process. So, on their own — and without much further persuading — content owners tagged 52% of the legacy site content for deletion.

Maintaining Content Quality

The team knew it had to strike a careful balance between a decentralized governance model that let businesses do as they choose and maintaining site quality. To accomplish this delicate balance, it opened a dialogue with communicators and content owners, provided ongoing training, and created guidelines and standards to ensure that the site maintains its integrity. Following are two examples of how that plays out:

- **Static content.** For owners maintaining somewhat static, reference-style content, the team strongly suggested revising pages during the migration to ensure that they were current, relevant, and well designed. To help guide their thinking, the team gave these owners general best practices for web communications and examples of strong pages. The team also implemented the *Was this helpful?* button at the bottom of pages to flag content that users weren't happy with and ensure quality control. Further, the team "expires" these static pages annually — notifying content owners that the pages must be either updated and republished, or deleted.

- **News content.** Business communicators who publish news can draft, design, and publish all of their own content to their “news source” tag, calling on the Enterprise Internal Communications team for support or counsel as needed. They can publish as little or as frequently as they’d like or as their business unit requires. Rather than mandate specific timing to publish new site content, the intranet team encourages embedded communications to reallocate content going out through other channels, such as email, to the site. Also, on the new intranet, all pages include author names to drive further accountability for content.

With the exception of news pages, which are archived for reference purposes, the intranet team is now in the process of deleting all of the old content from the legacy site.

Training

Since November 2016, the team has offered monthly training for all communicators and content owners, who can participate in as many sessions as they’d like to refresh their skills. They can also access a library of training materials whenever they choose. The Enterprise Internal Communications team is available to answer questions, provide support, and coordinate with the eBusiness team to troubleshoot issues.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Microsoft IIS
Bug Tracking / Quality Assurance	• HP Quality Center
Design Tools	• Axure and Axshare
Site Building Tools	• *inside* is primarily an ASP.net MVC app
Content Management Tools	• Opentext CMS
Search	• HP IDOL
Analytics	• IBM Digital Analytics
Other Functions	• Multiple microservices were built to integrate *inside* with other enterprise assets; typically, they were built with node.js or .NET

Search

Global search on *inside* leverages HP IDOL technology to search all intranet content, the company's people directory, and *My Site*, which houses the customized information employees add to their profiles.

With the new design, employees can search both the intranet and people from a single global search function. When performing a search, users see two types of results: content on *inside* and people related to that search. They can then filter their results by a variety of options. *inside* results can be filtered by type (Pages, News, PDF, Excel, Word, and PowerPoint) and by date (past 7 days, past 30 days, and past 6 months). People results can be filtered by location, division, and department. The team's goal was to offer filters that met users' needs without overcomplicating the options.

Team members regularly work to improve the relevancy of search results. They launched the site with a list of promoted terms that will return at the top of results, and they add to that list frequently. The list also includes injected promotional results from myHR, a separate site for benefits, compensation, and other HR-related items. Team members regularly analyze search performance, including the top search terms, and adjust search tuning, promotions, and metadata accordingly.

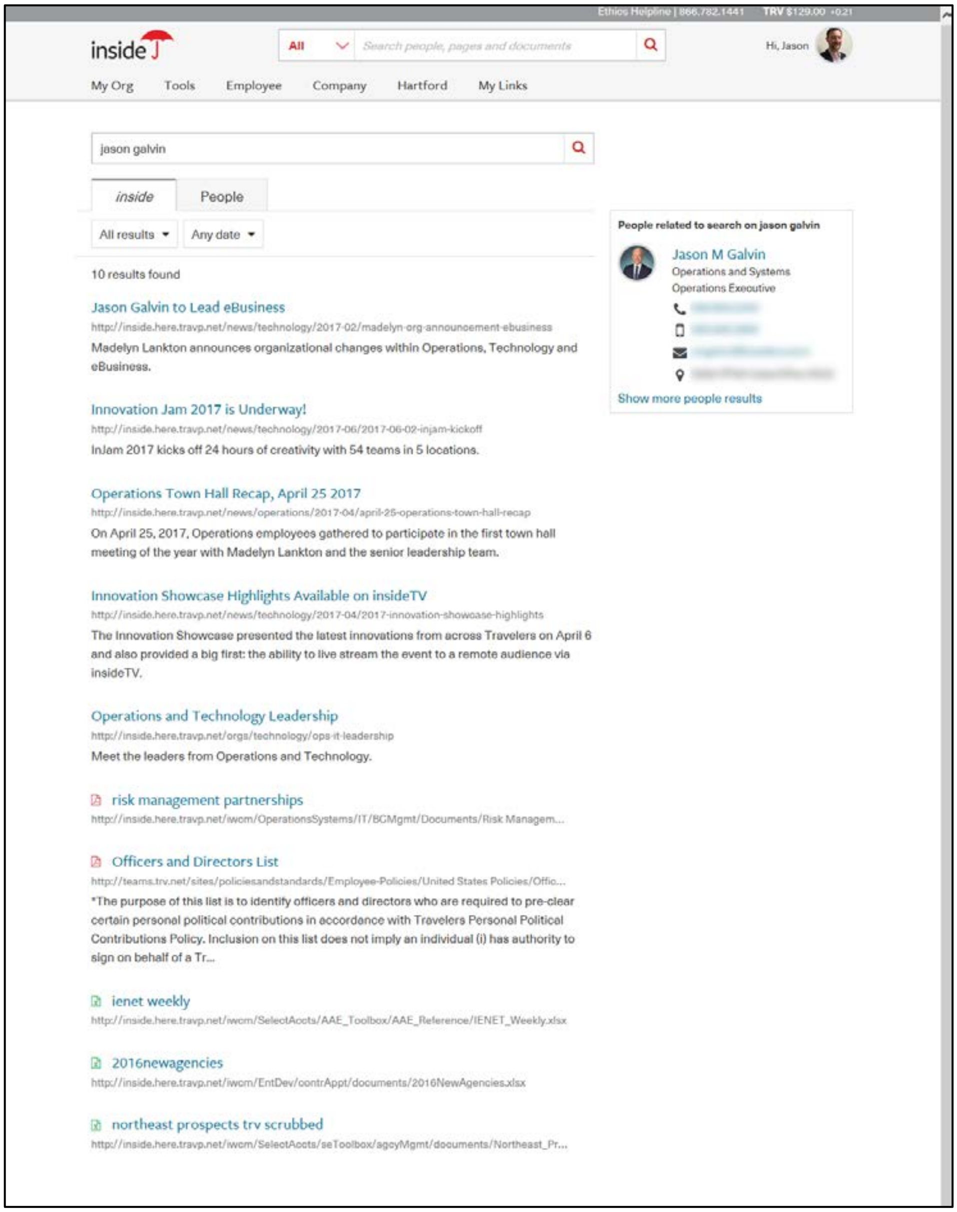


Image 135. Travelers Insurance Intranet Search. On the new intranet, employees can search both the intranet and people from a single global search function. When performing a search, users see two types of results: content on *inside* and people related to that search. Users can then filter *inside* results by type or date, and people by location, division, or department. *135_Travelers_15_GlobalSearch_Live.png*

Mobile

The legacy version of *inside* did not have a mobile presence. Employees can now access the directory and other intranet content from their mobile device via AirWatch Browser. Although the initial solution was a fully responsive homepage, the team is now narrowing the mobile version to include only search, navigation, and quick links, as these are the items employees most need while on the go. The team is also working with the company's mobile team to make accessing the mobile version more intuitive through a Travelers-styled icon.

Mobile is still a work in progress, but has already delivered solid wins. For example, the company's Claim business unit has a priority initiative to enable a growing mobile workforce and was recently able to shelve a multimillion-dollar project and use the new *inside* intranet platform instead. This team is also making an effort to move key knowledge documents off of SharePoint and onto the intranet, as it is more mobile friendly.

ROI

Nearly every action a user takes on the new intranet is tracked and reported in a monthly rollup to the intranet team. However, because the intranet's legacy version lacked metrics for the two-years before migration, the team has not been able to measure comparative usage. Instead, it tracks the new site's performance month-over-month. It also tracks qualitative successes that are big wins for the company's employees, such as eliminating the need for a twice-weekly email newsletter to all Claim employees.

Given the new intranet's accurate metrics, the team can confidently adjust the site on a regular basis. A simple example of this is the use of search metrics. Looking at search terms and the links users select on the results page, the team can tweak the search algorithms and navigation to reduce the steps for users.

The team has also received positive feedback from leaders and the businesses, all of whom are using the intranet more frequently to drive their communication efforts.

LESSONS LEARNED

Renwick explains some of the lessons learned through this redesign project:

- **Sometimes you have to go at the organization's pace.** "In 2014, when we first started this project, we knew we wouldn't be able to gain organizational buy-in and budget for some time. But we also knew we could get a lot of meaningful work done in the meantime. During the one-year plus that it took to socialize the intranet redesign with the right stakeholders, we researched and documented stakeholder needs, hosted employee focus groups, created user personas, wrote detailed business requirements, created draft wireframes and IA, and established a governance model. This enabled faster alignment with development teams and agency partners — and, ultimately, a more efficient build process."

- **Intake and research are essential, but won't tell you everything.** "We were diligent about talking to employees of all types to understand what they liked and didn't about the legacy site, but there were still some surprises. For example, we removed the *My Stocks* customization feature and showed just the Travelers stock price. Our interviews hadn't revealed anything telling about this feature, and we figured employees were accessing that information through one of the many other mechanisms like Google, their smart phones, etc. Almost immediately at launch, we heard from a lot of disappointed employees. While we didn't bring that feature back, there was a similar case where we did.

  "We heard *My Links* (bookmarks) on *inside* were by far one of the most popular and valuable features of the legacy site, so we not only kept it through the transition, but also made it more accessible and dynamic. We added it to the global navigation (as opposed to just the homepage) and gave employees the ability to organize their links into categories. We were feeling great about the new enhancements, but found that employees were frustrated by the additional click required to open up their navigation menu. Thanks to Agile, we were able to quickly add 'pin to homepage' functionality to *My Links* within a few months of launch."
- **Always put the business at the center, and don't be afraid to give up some real estate and control.** "Corporate had been the only source of content on *inside* since its inception, with 100% of homepage real estate owned by the Corporate Communications team. This same communication team led the redesign, but knew that lessening its footprint was in the best interest of the user. We worked to find a balance where corporate could get out the messages it needed to, while allowing businesses/functions equal space and stature."
- **Search reigns supreme.** "The world was our oyster when we started this project, but we were never distracted from what we knew employees needed most: to find what they were looking for quickly, easily, and intuitively. To make that happen, search had to work — and work well. Throughout all phases of design and build, we were incessant about ensuring the effectiveness of search, sometimes setting aside the cooler, more modern enhancements to make it a priority. Today, I'm proud to say search is very effective."
- **Never stop improving or asking for feedback.** "We knew we wouldn't get everything right at initial release, and encouraged employees strongly to provide their feedback, likes/dislikes, and suggestions. During the first three months, every communication ended with a prompt for employees to share their ideas for improvements, with a link to a general inbox we managed. In three months, our project team responded to — and in many cases, acted upon — more than 1,100 email suggestions from intranet users.

“We are also on a monthly release cycle to ensure we’re continuing to improve and make enhancements to the site. Since initial release in February 2017, enhancements, new features, and technical updates have been implemented at least monthly — a model that more closely mimics what employees experience in the outside world. Future enhancements include adding commenting, profile badges, and advanced user experience testing, among others.”

UN World Food Programme (WFP)

OVERVIEW

COMPANY

The UN World Food Programme (WFP) is the leading humanitarian organization fighting hunger worldwide, delivering food assistance in emergencies and working with communities to improve nutrition and build resilience. Voluntarily funded, WFP assists 80 million people in approximately 80 countries each year.

Headquarters: Rome, Italy

Company locations: WFP works in about 80 countries across the world, including Africa, Asia, America, and Europe, with headquarters in Rome.

Locations where people use the intranet: In addition to staff in its Rome headquarters, WFP staff members access the intranet from approximately 90 major offices across the world.

THE INTRANET

Users: All WFP staff has access to the intranet, which holds all of the global and corporate documents used by numerous staff members around the globe. The intranet is also the main portal through which staff members access the phone/email directory and most of the other WFP systems and services.

Mobile approach: Responsive web design

Technology platform: Drupal 8

DESIGN TEAM

Approximately 11 people were involved in designing and building the intranet.

The three main team members, UX Manager Daniela Pizzurro, Project Manager Jordan Cox, and Transition Manager Mark Horrell, did stakeholder management, designed the CMS, oversaw development and testing, and led 100+ editors in transitioning their content.

Four external developers and one external graphic designer built the site with oversight from an internal tech lead.

The core team was helped by a taxonomist, who built a corporate taxonomy that the intranet uses as part of its IA; a user research firm that carried out phone and in-person research before design began; an intern; and two external trainers who built and led the two-day editor training courses.

INTRANET TEAM

Team members shown here (left to right): UX Manager Daniela Pizzurro, Project Manager Jordan Cox, and Transition Manager Mark Horrell.

HIGHLIGHTS ABOUT THIS WINNER

In myriad ways, the World Food Programme's intranet, WFPgo, makes clever suggestions for users by consolidating resources in menus and on pages. This mentality is standardized and reproduced in several page types. The inspired quick launch feature for applications makes it possible to open various services from the global navigation and from search results.

WFPgo is responsive, helpful, and even quite pretty. In contrast, the old intranet was dated, lacked content governance and mobile access, and users complained about its search results for years. Additionally, 45 different intranet sites each had their own design, tone of voice, IA, and navigation. Calling that intranet's design "inconsistent" would be a severe understatement.

A new chief of Internal Communications was the energy the organization needed to start the redesign. The new intranet does an admirable job with IA, aesthetics, making information and tools discoverable, and consolidating information in such a way that users can complete entire processes confidently and easily.

- **Quick access to apps.** A special content type lets users launch apps from the *Services* section page, as well as from the nontraditional megamenu and the search results pages. Creative minds turned common features into nontraditional launch pads, enabling employees to maneuver to the applications they need.
- **Topics and services.** Sometimes it can be difficult for employees to find all the available information and services — from invoice tracking to emailing via the Outlook web app. This is not the case on the WFP intranet. Service and topic pages are a standard and refreshing way to consolidate these offerings for employees. With these pages, employees are highly likely to take advantage of everything the organization has to offer.
- **Aesthetically pleasing.** "Pretty" isn't an adjective one often uses to describe an intranet, but here the word is entirely apropos.
- **Helpful footer topics.** The very fat footer advertises links to topics such as food nutrition, emergency preparedness, leadership, and security. Because footer content has no rules — it doesn't have to include a site map or links to social tools — the team took advantage of its flexibility and uses it to call out various unrelated but important topics.
- **Departments.** Recognizing the organization's somewhat complex structure, the team created a list page of all departments, making it easy to fit together the pieces of the organization and get a macro-level perspective. On a micro level, users can find combined details about any department.
- **Acronyms.** The intranet supports the organization and its culture in countless ways. Because WFP has sundry frequently used acronyms, the acronym search is a key feature for new and seasoned employees alike.

BACKGROUND

By 2014, WFP's intranet design was about seven years old and had become quite dated. The organization's new chief of Internal Communications had just arrived and decided it was time to make a change. The site had no mobile support, and staff had been complaining about poor search results for years. Weak governance and an overly flexible CMS had led many mini-sites within the intranet to flourish, complete with their own IAs and custom, hacked-in designs.

The redesign project started out with a single purpose: connect employees to the organization and the tools they need to perform its mission. Included in that goal were several specific objectives:

- Get users to the right information easily to help them do their jobs
- Personalize content based on location and job type
- Improve communication between staff and management
- Encourage more field staff (outside the Rome HQ) to post content

- Present a more cohesive view of WFP to staff

The mission changed somewhat as the project progressed, but this was the fundamental plan as it began.

WFP colleagues who built the organization's external website (WFP.org) had moved toward UX in a major way starting in about 2013, as had seemingly every intranet the team members studied; they knew it was time to get more familiar with testing, user research, and UX than they ever had before.

Start by Finding High-Level Champions

At project launch, an Intranet Council was formed to give senior-level managers oversight of the redesign and help secure their blessing. The council comprised the chief of staff, senior division chiefs (IT, Policy and Program, Innovation, Communications, and HR) and a few country and regional directors (senior leaders in the field).

Next, the team hired Assist, a Milan-based user research company. Assist did extensive user research in Rome; took field trips to WFP offices in Egypt, Laos, Thailand, and Senegal; ran surveys; and conducted many phone interviews in multiple languages across WFP's regional offices.

This research identified the main universal pain points across all locations. The consulting team studied how users found information and provided many suggestions, ideas, and user requests for new features. This research gave the internal team early ideas about content types and how to structure the site, as well as ideas for the IA and functionality.

In parallel, the design team set up three working groups: knowledge management and taxonomy, technology, and UX. These groups were the main conduits between the design team and other parts of WFP that needed to be involved.

Around the same time the intranet research began, another WFP group was working to build a corporate taxonomy — one that is now in use across several systems. The intranet team took advantage of this parallel effort and linked it to its own IA efforts. The two groups shared tools and expanded the Intranet Council to also include taxonomy oversight.

In late spring of 2015, the intranet team discovered another effort that would help inform its work — the GOV.UK site. Because the history and approach of that site was so well documented by the Government Digital Service team online, the WFP team used that knowledge to help it expand what it saw as possible for the new intranet. Team members reasoned that, if a public service website could be on the cutting edge of usability and structured content, and successfully consolidate approximately 1,884 government sites into a single, beautifully designed site with the simplest, most understandable English they had ever seen, why couldn't they get a bit bolder with their choices, too?

Goals

When the first big Intranet Council meeting rolled around in July 2015 and it was time for the intranet team to share an update on its progress, it found that a few of its original goals were either out of reach technically, not absolutely needed by users, or both. WFP Communities, the internal social network that makes up another part of the intranet, had taken up content personalization; it was also the main place for field staff contributions. This meant that the WFPgo team could focus more on making HQ's corporate information as simple and understandable as possible to all users. At the July 2015 meeting, the team therefore shared its simplified goals:

- Organize the intranet around themes that make sense to most users
- Ensure that the most important information lives on the web first
- Make the intranet mobile-friendly
- Establish *clarity* and *usefulness* as the new global-level standard

By the fall of 2015, the team was getting closer to starting an actual prototype in Drupal 8 and had a better sense of how the site might be structured — but it still had a ways to go.

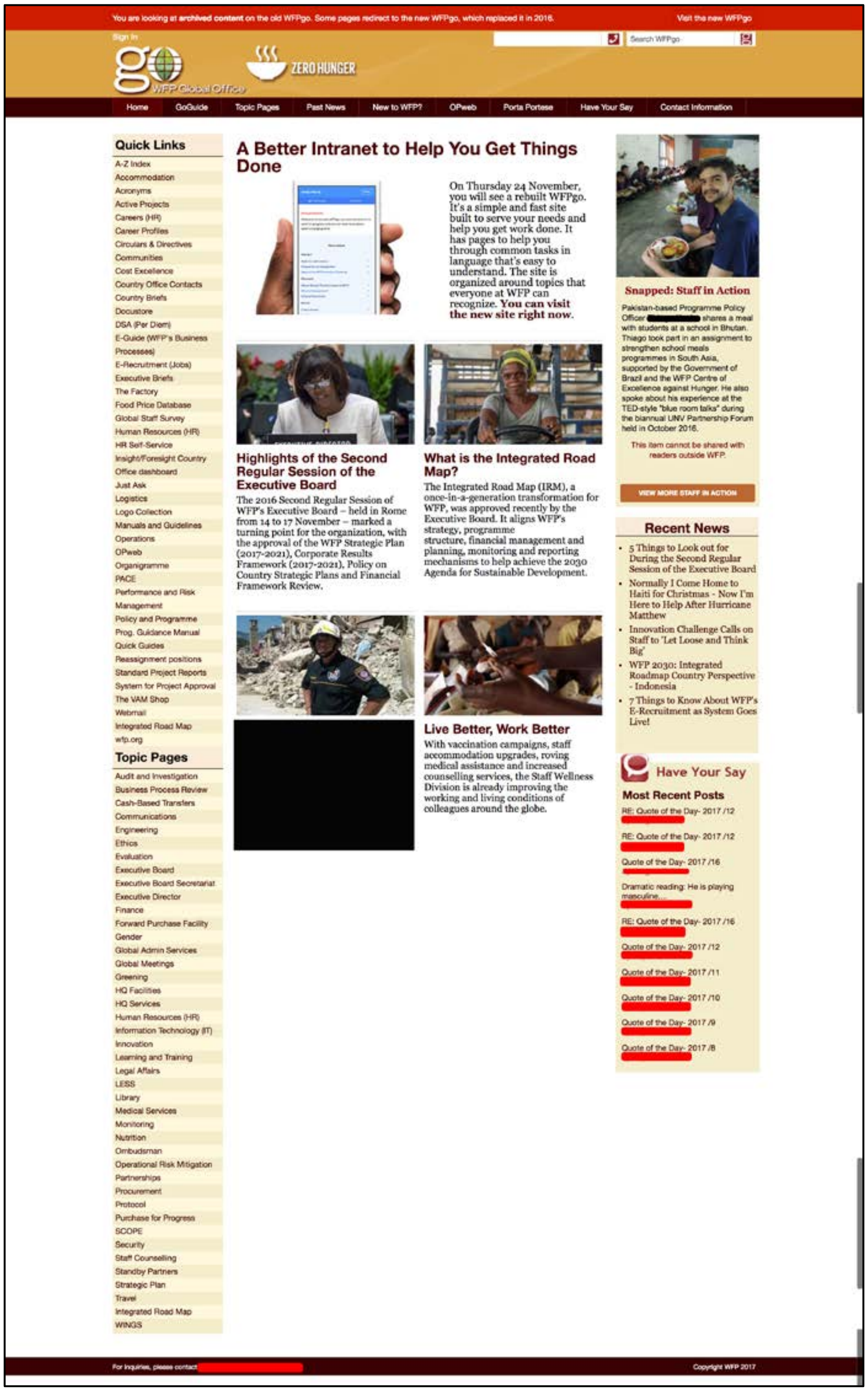


Image 136. WFP Intranet Old Homepage. The old WFPgo homepage had an old fashioned look and feel, overwhelming navigation, and a cluttered environment. *136_WFP_01_home_old_intranet.png*

DESIGN REVIEW

Homepage

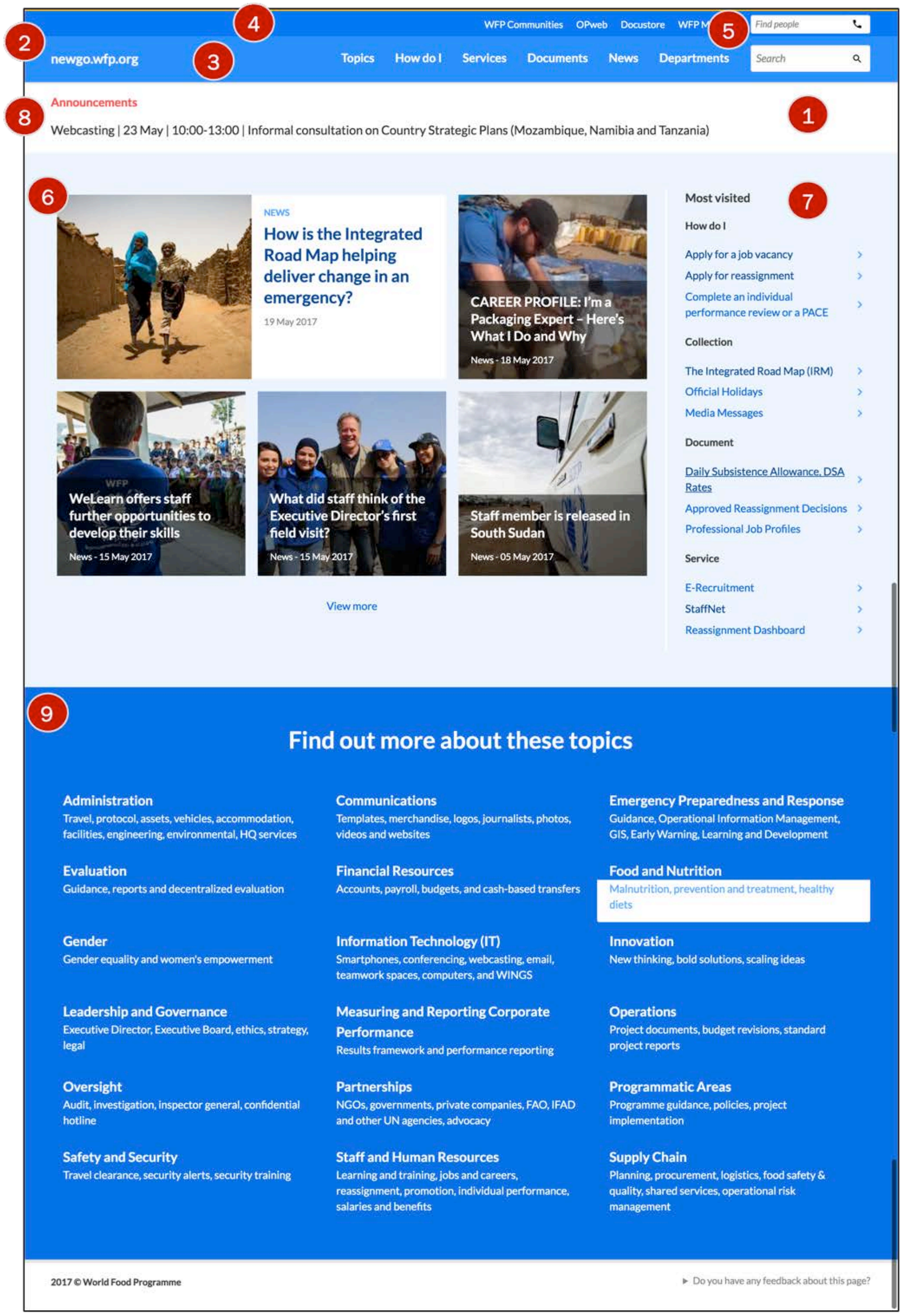


Image 137. WFP Intranet Homepage. The homepage of WFPgo, the WFP intranet, serves news and the most-visited links in an appealing visual grid. *137_WFP_02_home_live.png*

Homepage Highlights

A simple grid and attractive aesthetic packages news, most popular links, and topic links.

1. **Visual appeal.** The WFPgo homepage is very easy on the eyes. A consistent grid and square and rectangular shapes are the foundation of this stylish design. White, black, and shades of blue comprise the color palette, which creates a soothing vibe.
2. **Navigation.** Across the top of the page, in two slightly different shades of blue, are the utility bar (on top), and the global navigation bar (below it).
3. **Global navigation.** The global navigation is available on each intranet page. Links for Topics, How Do I, Services, Documents, News, and Departments cover the gamut of content types that employees might need.
4. **Utility bar.** The utility bar links to other internal WFP sites, including communities, documents and manuals, and more. These links take up little screen real estate, but are a big win for employees who frequently access these sites. The small toolbar acts as a mini-portal, consolidating links to important sites in one place. Items in the utility bar include the following:
    - *WFP Communities*, the social collaboration platform that helps staff connect, discover, and share information with colleagues around the world.
    - *OPweb*, the Corporate Operations intranet for operational information.
    - *Docustore*, the corporate documents repository where approved versions of documents are stored, with links to and from other sites.
    - *WFP Manuals*, a web-based service for publishing online manuals, user guides, and handbooks.
5. **Site and people search.** Nodding to the Gestalt proximity principle, designers stacked the two related search fields — people search and site search — on top of one another. This vertical, adjacent arrangement makes it less likely that employees will type a query in the wrong field. No matter which field the users locates first, they will also see the other field and realize they should make a choice. Also differentiating the fields from one another are the visual cues: the labels *Search* and *Find people,* and the magnifying glass and telephone icons.
6. **News stories.** The six large squares in the main content area display news article headlines, attractive images, and the article's publication date (with the month spelled out for international design). The main news item is allotted two of the six squares, with another four squares for the other four stories. The *View more* link below the

articles leads to the main news/landing page (which also includes news articles that don’t make the homepage cut).

7. **Most-visited links.** Great minds think alike — and thus often look for the same information. The WFP intranet helps make it easy for users to find popular links by listing the 12 most-visited links. This list of links is easy to see and access in the homepage’s right rail — a position that is becoming a somewhat standard place to put popular or custom links because the location makes them readily available. The list here is labeled Most visited, explaining why the links are in a prominent position. They are divided in sets of three under their respective content types: How do I, Collection, Document, and Service.
8. **Announcements.** Employees are kept abreast of timely events in various departments at the top of the homepage. These announcements are clickable and lead to more information.
9. **Fat footer.** The large blue section at the bottom of the page is the fat footer, which shows relevant high-level topics from the corporate taxonomy. Pages about important topics, which can also be found via the navigation and search, are advertised here.

Home, Mobile

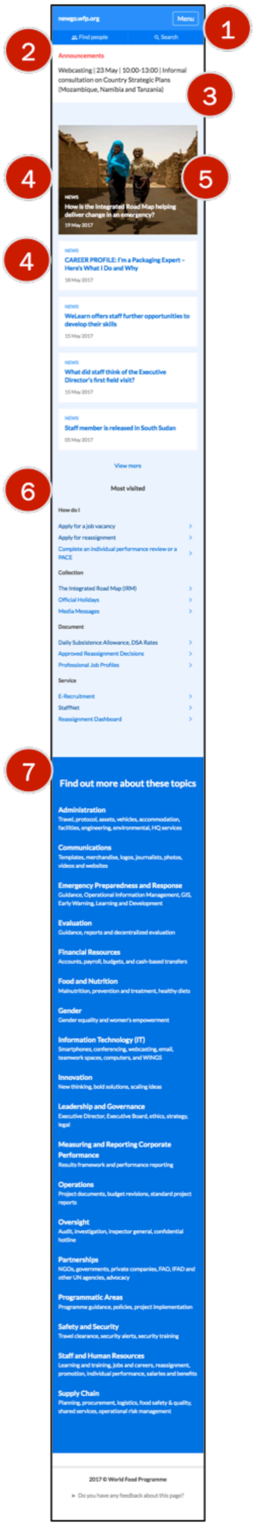


Image 138. WFP Intranet Mobile Homepage. All but one of the news story images are left out of the mobile design, which makes the WFPgo intranet load quickly on mobile. *138_WFP_03_home_live_mobile.png*

Home Mobile Highlights

The design team massaged, moved, and sometimes removed elements to make this responsive intranet fast and efficient, and display in a single column on mobile.

1. **Global navigation.** To effectively use the scant screen real estate on a mobile phone, the global navigation is collapsed under the *Menu* button in the upper right. The hamburger icon is familiar to many, but designers made the safer choice here with the *Menu* button, as not all users understand the hamburger icon. The utility bar is not available on smartphones. Designers found that accessing another platform via WFPgo was unusual, because users outside the WFP network must either tunnel in or enable the VPN. Designers also discussed the complexities typically entailed in using three-layer navigation on a small device, so they chose to omit the utility bar.
2. **Site and people search.** The people search and site search features are arranged horizontally instead of vertically to maximize screen space.
3. **Announcements.** The announcements are displayed at the top of the screen, so they're hard to miss.
4. **News.** One news story is showcased at the top, with four other news story headlines listed below it; the *View more* link leads to all news items.
5. **Images.** To make the intranet light and load quickly, designers chose to display only the first featured story's image on mobile.
6. **Popular links.** The *Most visited* links section drops from the right rail position on desktop to below the news on mobile.
7. **Fat footer.** All the desktop footer's links also display on phones, but as a single column of links.

Megamenu

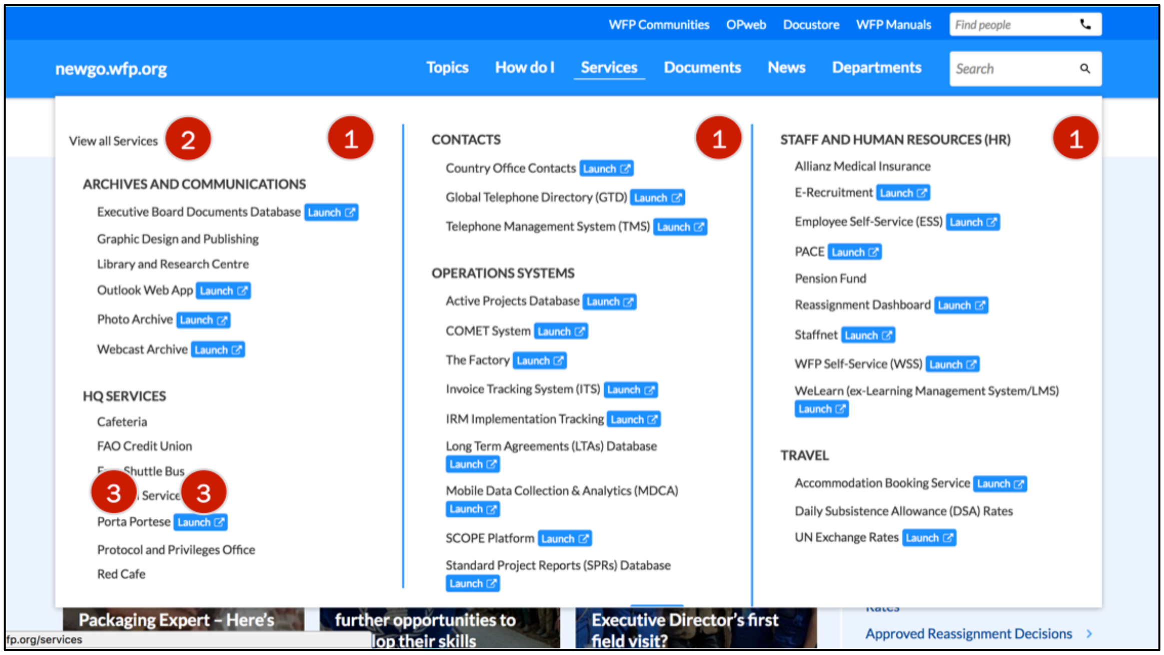


Image 139. WFP Intranet Megamenu. Employees can link to pages, read descriptions of apps, and launch apps directly from the megamenu.
139_WFP_04_navigation_sevices_megamenu.png

Megamenu Highlights

This atypical megamenu allows employees to open pages, read about services, and launch apps easily.

1. **Sections.** The links are divided into sections, with subheadings in bold and all capital letters to signpost each set.
2. **All services.** More platforms and services are available than are listed in this menu; the *View all Services* link in the upper left leads to a page of additional services.
3. **Open apps and pages.** Links and buttons make this intranet a great facilitator to other platforms and services. With the help of a special content-type feature (*Services*), the web-based apps and tools are mapped to descriptions about what they are and what employees can do with them. The black text links lead to pages, while the blue *Launch* buttons open an application or service. So, users who know which service they want can launch it from the menu, without going through the intermittent step of going to a webpage, then accessing the app from there. Employees who are not sure about what a service is, however, can follow the link and read about it, then open it from that page. The launch buttons are available on the megamenu, on the *Services* main page, and in search results within the short description.

Mobile Navigation Menu

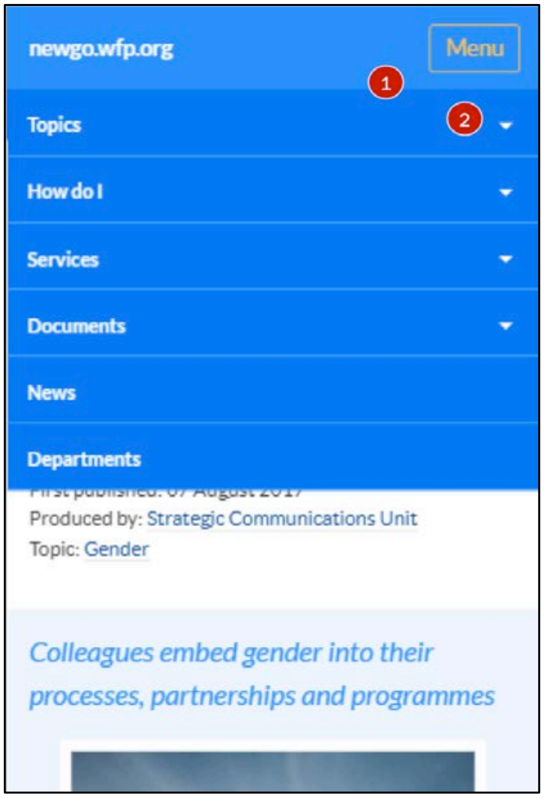


Image 140. WFP Intranet Mobile Navigation Menu. On mobile, tapping the *Menu* button opens the accordion menu with the sections collapsed. *140_WFP_05_menu_mobile.png*

Mobile Navigation Menu Highlights

The menu is changed to accommodate mobile:

1. **Collapsed sections.** The links within the accordion menu correspond with the desktop's tier-one menu. Sections are collapsed by default; this avoids clutter, overwhelming users with choice, and issues that come with scrolling a long menu on a small touchscreen.
2. **Expand icon.** A small standard down arrow communicates which menus are expandable.

Mobile Navigation Menu Opened

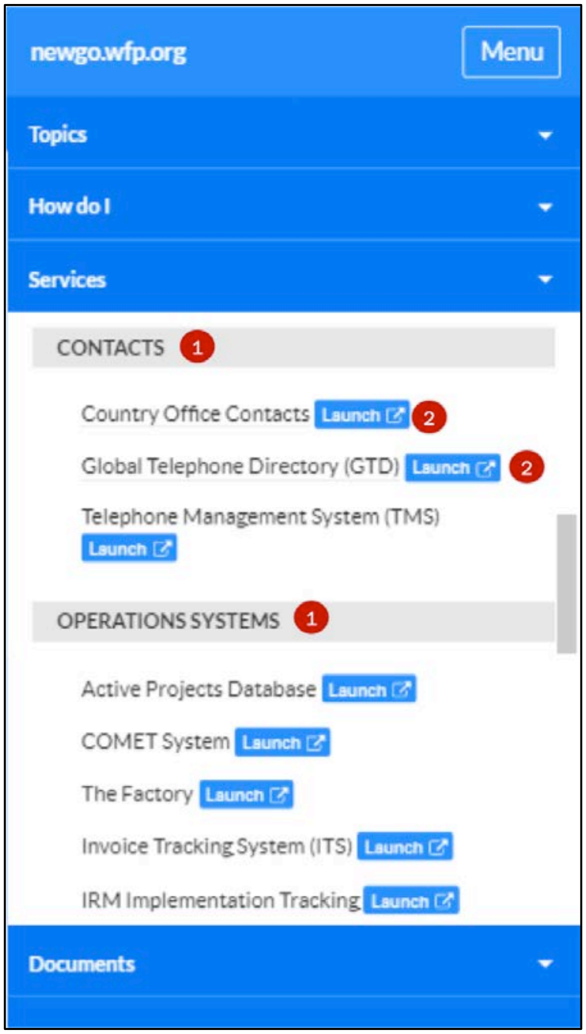


Image 141. WFP Intranet Mobile Navigation Menu Opened. Menu links are sorted in categories on mobile on the WFP intranet. *141_WFP_06_open_menu_mobile.png*

Mobile Navigation Menu Opened Highlights

The accordion menu expands and collapses with the standard arrow icon.

1. **Tier two.** Headings within the menu make it easier to scan the topic links.
2. **Open apps.** As on desktop, the *Launch* button launches the app, while the black links open the related service's web page.

Services Pages

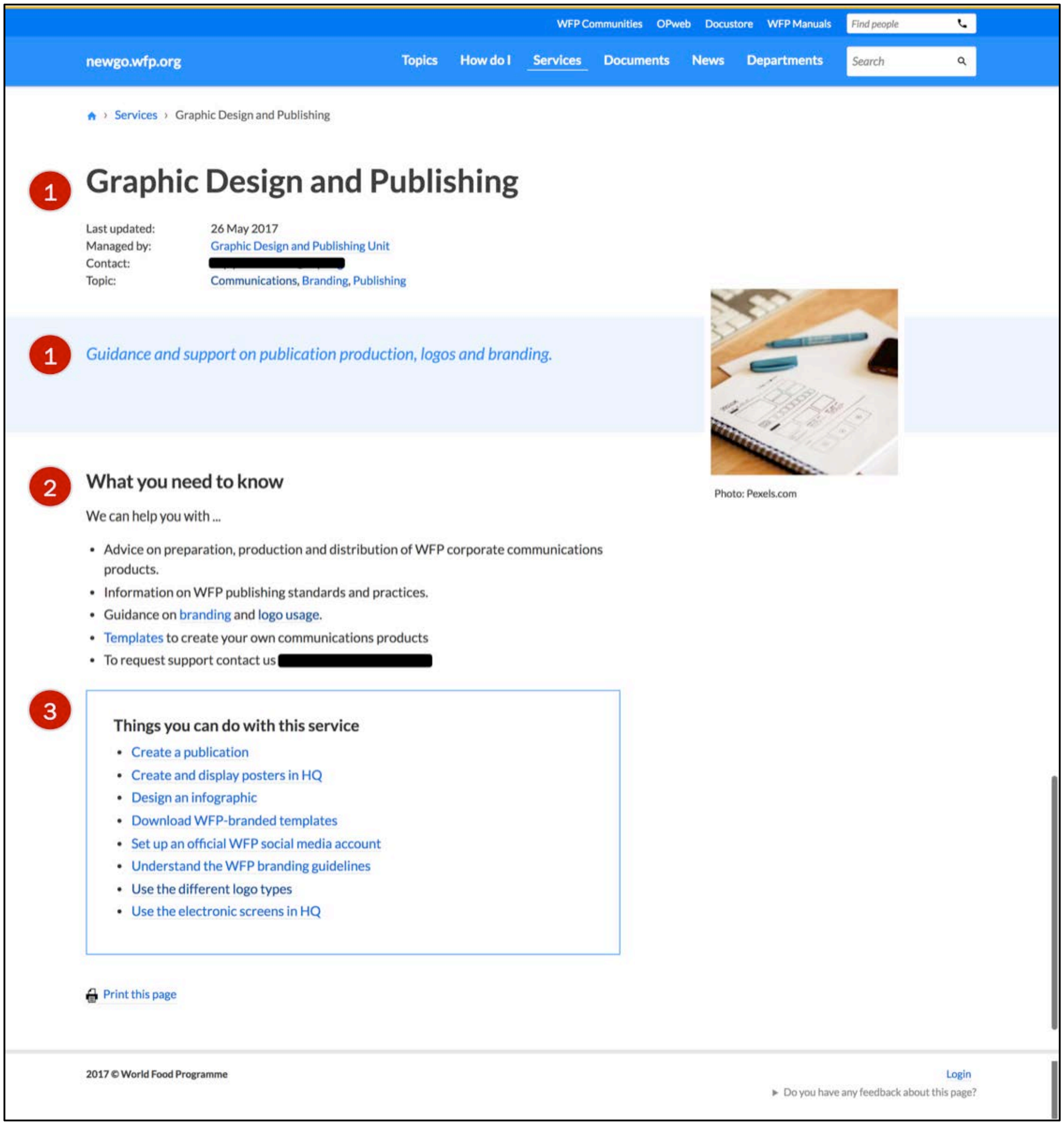


Image 142. WFP Intranet Services Page. The *Services* page for graphic design offers links to resources and advice for using the service. *142*_WFP_07_service_page.png

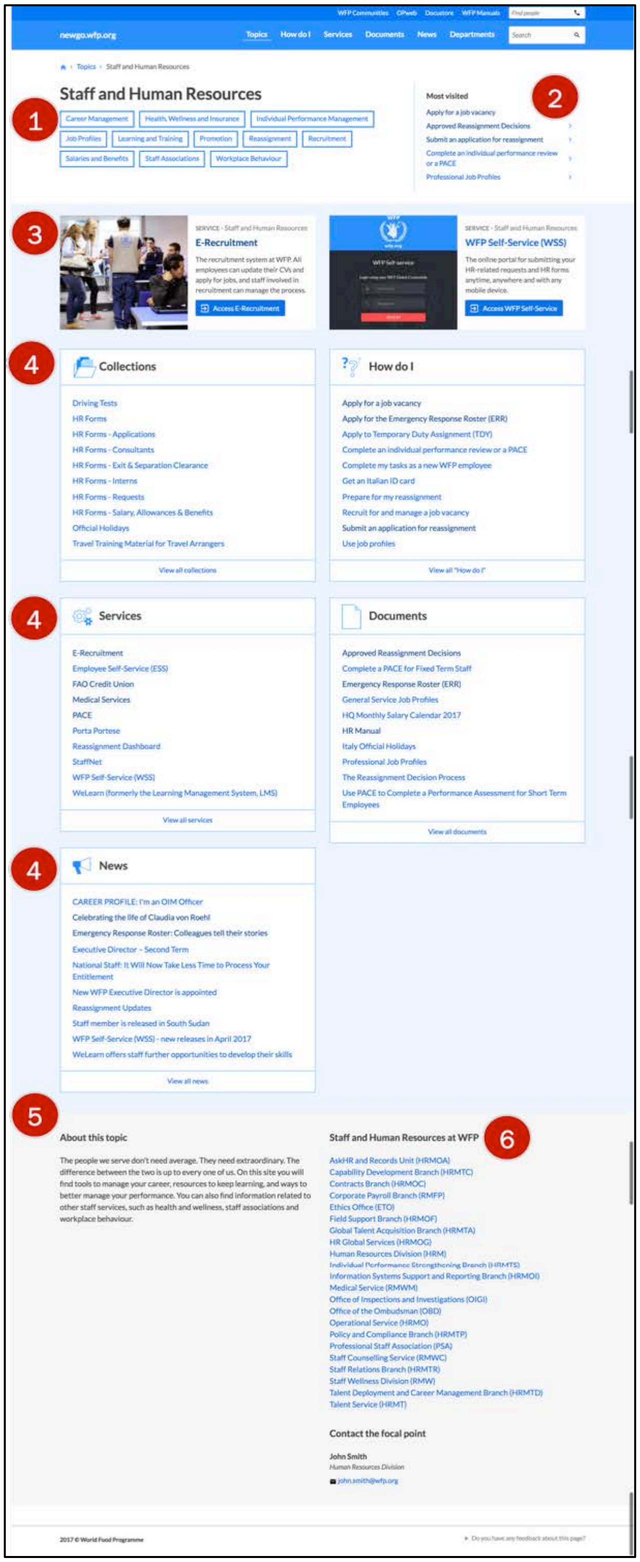
Services Pages Highlights

WFP employees are supported by many internal services and apps, including recruitment, pension fund, medical services, invoice tracking, library, and research. *Services* pages describe amenities and related activities and apps, making each service page a one-stop shop. Employees — especially new hires, who are not aware of which services are available or how to access them — can go to the respective service's page or even the main *Services* section page, which bridges WFPgo with other apps and sites.

1. **About.** The *Graphic Design and Publishing* page is an example of a service page on WFPgo. The page lists the service's name as the page title. Information at the top of the page includes the team that manages it, related topics, and a tagline — *Guidance and support on publication production, logos and branding* — providing further insight about what this service is about. The contact information is easy to find (also in the page's top section), and the topics aid the search function.

2. **Service benefits.** *What you need to know,* the title of the page's next section, is very explicit and makes people want to read it. It describes in simple language what the group can help people with, using bullets to make the information easy to digest.

3. **Enabling employees.** The *Things you can do with this Service* section offers a list of tasks drawn exclusively from the *How Do I* content type. These links appear automatically when someone adds a service or document as a related link to a *How Do I* page. In other words, when taking users through the steps to complete a task, it asks users to link to the other tools (be they services or documents) they use to complete that task. Once they do that, it automatically displays the link to the task (*How Do I*) on the service or document page. Thus, users who land on the service or document get an automatic list of the tasks they can do with it. In the example shown here, several valuable capabilities surround the tasks, such as setting up social media accounts, using brand templates and logos, and creating display posters. Offering these on the intranet helps employees create the marketing materials they need under the tutelage of experts.



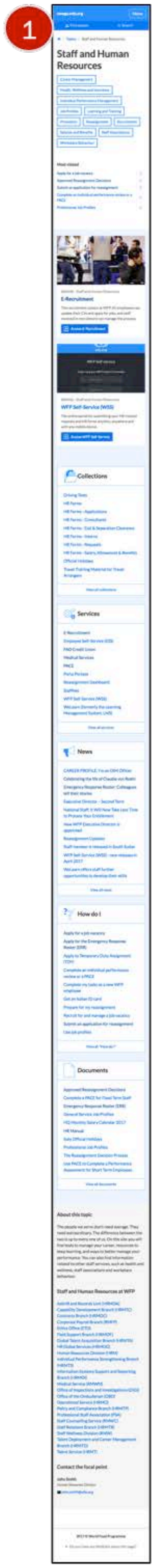
Topic Pages

Image 143. WFP Intranet Topic Pages. On topic pages, such as the *Staff and Human Resources* page, five main sections consolidate all the information employees might need about a topic. *143_WFP_08_topic_page.png*

Topic Pages Highlights

Each topic page consolidates all types of information and media about a subject. Users can reach topic pages via the footer and global navigation.

1. **Topics.** The related topic pages appear in buttons at the top of the page, suggesting to users other areas they might want to peruse.
2. **Most visited.** To get a sense of which pages are most often used, employees can look to the *Most visited* links section in the upper right. This cultivates the assumption that if colleagues needed this, maybe I do, too.
3. **Top tools.** Descriptions of and access to the vital tools related to the topic appear near the top of the page.
4. **Main sections.** Five main sections consolidate all the information employees might need about the topic. These sections are *Collections*, *How Do I*, *Services*, *Documents*, and *News*.
5. **About.** A clear description of the topic appears in a short summary statement.
6. **Groups.** Various groups related to the topic are consolidated in a list of links. This list boosts the discoverability of related resources.



Topic Pages, Mobile

Image 144. WFP Intranet Topic Pages, Mobile. On mobile, topic page sections and lists flow to a single-column layout, prioritizing the most important content. *144_WFP_09_topic_page_mobile.png*

Topic Pages, Mobile Highlights

Topic pages are elongated to accommodate the single-column layout on mobile. The content that is most important to users appears first.

1. **Order.** The order of sections on mobile topic pages remains almost identical to that on desktop, but drops the right-column content.

Departments List

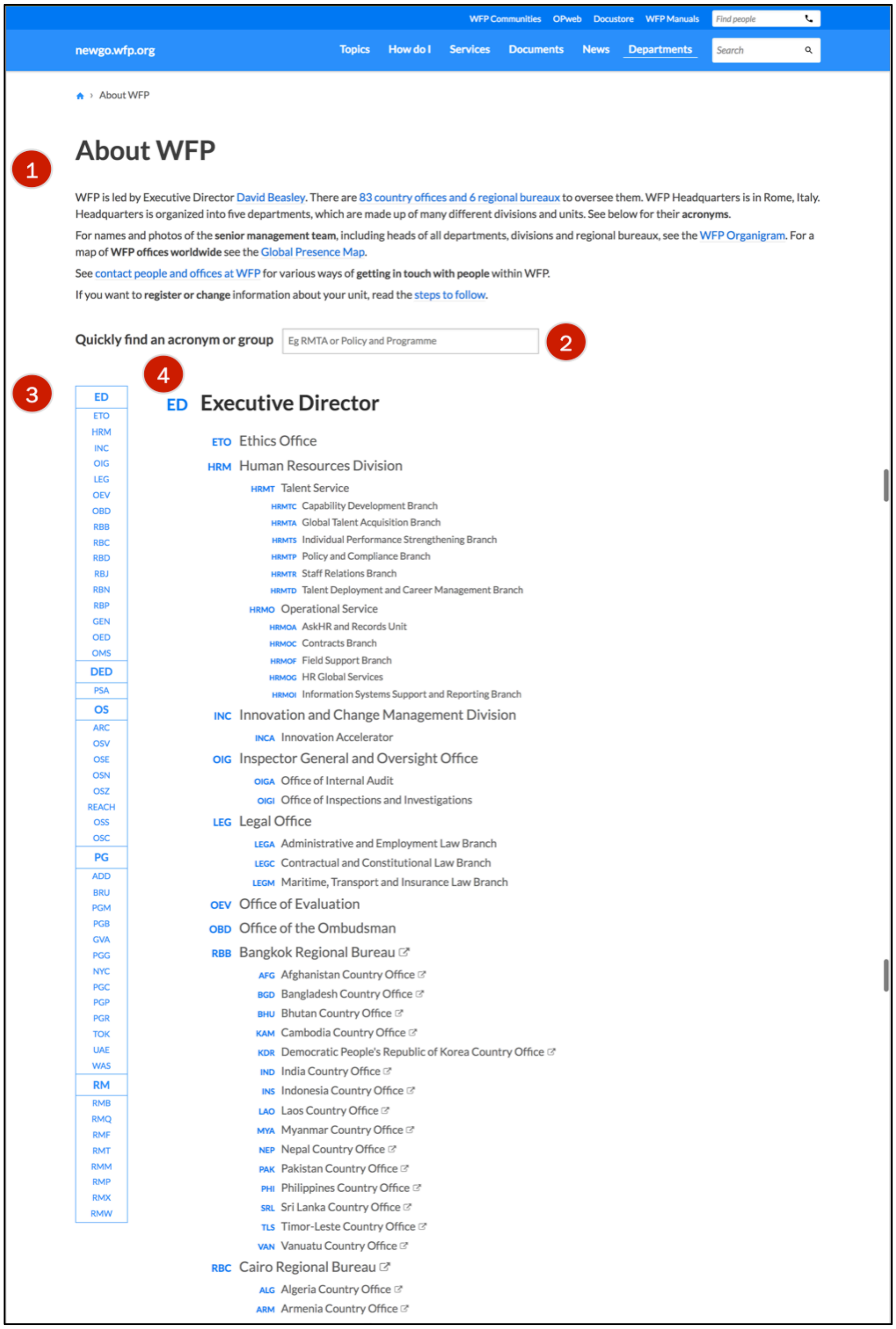


Image 145. WFP Intranet Departments List. The *About* WFP page includes the names of all departments, how the organization is structured, and acronyms for each department name. *145_WFP_10_departments_cropped.png*

Departments List Highlights

Accessed via the *Departments* link in the global navigation, the *About WFP* page includes a complete list of WFP's departments and the organization structure. It is somewhat like an organization chart, but in a list format.

1. **About.** A basic description of how the organization is organized, along with links to related pages, appears at the top, setting the stage for the rest of the page.
2. **Search.** This speedy search queries only the items on the list. As the user types letters, the page automatically displays only the results that match. This search is very important at WFP because there are hundreds of acronyms used on a regular basis. Most parts of the organization are identified by an acronym, including the headquarters, which is organized into several departments each made up of dozens of different divisions — divided into about 129 units in all — plus 83 country offices and 6 regional bureaus. As you may imagine, acronym search is one of the top tasks for this intranet.
3. **Acronym list.** This list on the left provides in-page navigation down the very long list of acronyms.
4. **Department list.** Here, users can find and learn the acronym for each department, or click the link and go to that department's page.

Department Pages

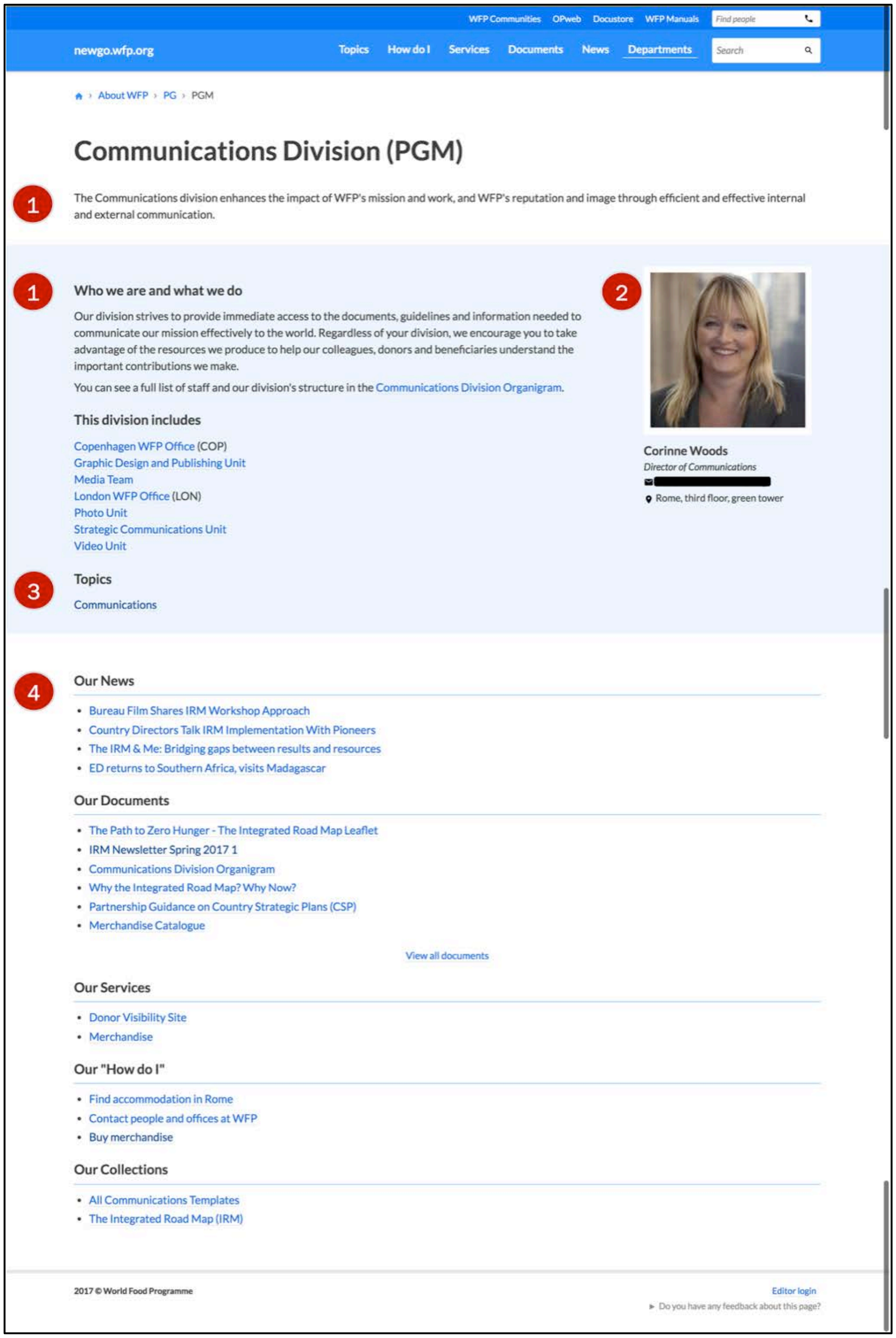


Image 146. WFP Intranet Department Pages. Each department, division, and unit within the headquarters has its own page.
146_WFP_11_department_individual_page.png

Department Pages Highlights

Employees can familiarize themselves with their organization and what each department does as each department, division, and unit within headquarters has its own page.

1. **About.** The page's top section clearly describes what the department does and which teams are included within it. Each department also has its own organization pages.
2. **Leader.** The group leader, along with a photo, job title, and office location, appear in the page's upper right. Putting a face to the team makes the page feel more personal.
3. **Topics.** If the team provides content for or works on specific topics for the intranet, these topics are listed here. This is also how the team controls the list of departments on each topic page, by associating topics to departments.
4. **News and resources.** These sections have clear titles and list the department's recent news, documents, services, *How Do I* content, and collections.

Feedback Form

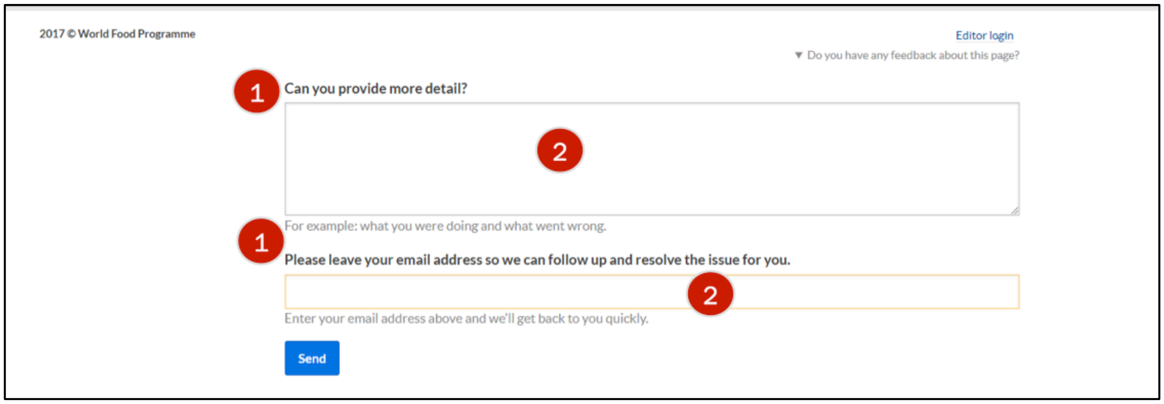


Image 147. WFP Intranet Feedback Form. The feedback form was inspired by one the team studied on the www.GOV.UK website.
147_WFP_12_feedback_form.png

Feedback Form Highlights

The feedback form is accessible from the *Do you have any feedback about this page?* link that appears at the bottom of each page. Inspired by the same feature on GOV.UK, the feedback form collects employees' ideas, opinions, and bug reports. The submissions are stored in the CMS, and the intranet team checks it daily and aims to respond to people within 24 hours. The feature was very helpful when the site launched and continues to reap valuable suggestions.

1. **Labels and notes.** Notes below the fields give more guidance, such as telling users to describe what they were doing. They also ask for the user's email address so the team can ask questions and respond. The mention of a response suggests the relationship is reciprocal: the user gives a suggestion, and the team responds quickly.
2. **Fields.** The large fields indicate that users don't need to edit themselves when offering feedback.

DESIGN PROCESS AND USABILITY WORK

User Research by the External Team

In the project's first phase, WFP hired an external company to carry out research. These efforts included:

- 11 1:1 interviews sessions with top managers in HQ and regional bureaus to collect feedback on the existing gaps of WFPgo and the expectations for the future intranet portal
- 80 remote phone interviews with WFP employees worldwide
- Ethnographic observations in four different locations: the regional bureau in Cairo, and country offices in Laos, Thailand, and Senegal
- 10 1:1 interviews sessions with WFP staff from various divisions in the HQ office to collect feedback on daily work activities, their use of the intranet, and existing gaps on WFPgo
- An online survey sent to all WFP staff members

This research helped the team identify the pain points for users, such as the search engine; the fragmented and outdated site information; the structure, which resembled the HQ structure too closely; the lack of link categorization; the unfulfilled expectation of multilingual content; the lack of personalization and/or targeted global versus local content; and no mobile accessibility.

The agency also proposed an information structure for the future intranet content based on three main clusters of content types: informative, operative, and supportive. Finally, the agency presented basic mockups of the navigational model and interaction design elements.

A Need for More Research

Most of the data collected by the outside agency was qualitative, and the team felt it needed quantitative data as well to help it prioritize the pain points identified by users. There were just too many issues, and it would have been impractical to tackle them all at once.

As for the content types, while the clustering proposed by the UX company made sense, in general, the internal team struggled to adapt them to the existing intranet content. Moreover, the team did not actually have content for some of the subtypes suggested.

Lastly, it would not have been reasonable to build a site with a high degree of interactions and personalization because of the organization's low-bandwidth in field offices, where a big portion of the staff is located.

The Internal Team's User Research

The internal team began its own additional user research efforts in August 2015. One of its first steps was to run a series of usability tests on the old intranet. Although team members knew the old site would be shut down, they wanted to extract data they could use as benchmarks against the new intranet's performance.

With that in mind, they conducted usability tests on the old intranet with 20 participants (55% women and 45% men). Approximately 50% of participants had worked at WFP for more than three years, 17% had been at the organization for 1–3 years, and 33% had been employed for less than a year. Nearly all participants used the intranet regularly; only two said they used it infrequently.

These tests, coupled with regular monitoring and analysis of the site's Google analytics data, made it clear that the main pain points the team needed to fix were the IA and the search engine. It therefore initiated its work on the new site by focusing on the content types required to provide structure.

First, team members scanned the existing content of different groups on the old site to see which, if any, content types were used, as well as to find common or shared content types. They also drafted a list of content types and tried to map existing content against them. These types were:

- Corporate documents
- Services and tools
- News and announcements
- Organizational and corporate units

At the same time, they piloted a user research process for the old intranet's *Communications* section. This research was aimed at:

- Investigating the needs and expectations of both the users interacting with the COM division and its employees
- Understanding which content drives site traffic and what users are looking for that isn't available or could be better provided
- Prioritizing the new *Communications* section by auditing and subsequently rewriting or reframing the content

The research consisted of several methodologies:

- An online survey sent to the organization's communications community (more than 100 surveyed; approximately 60 responses returned)
- Contextual and remote interviews (11 interviews with staff members worldwide)
- Interview sessions with the heads of units within the Communication Division
- Web analytics
- User testing
- Content audit

The team also used other methods, both quantitative and qualitative, to apply a "data triangulation methodology" to validate outputs by cross-verifying the same information. The research gave team members useful insights into their users, the content they most often used and looked for on the intranet, and three top usability issues:

- Findability
- Readability
- Reliability

Using Research to Solve Problems

The research also helped the team identify recommendations and solutions to solve these issues, including the following:

- **Recommendations to address findability:**
  - Make the most-used content more visible
  - Make sure it is categorized properly for the search engine
  - Adopt three navigation models: by content type, by topic, by division
  - Conduct an open card sort on items if any major navigation problems arise
- **Recommendations to address readability:**
  - Use simple language before going into technical detail and don't use jargon
  - Make content more concise; short sentences are easy to read
  - Make the internal content and labeling more consistent
- **Recommendations to address reliability:**
  - Make it clear that content is the latest, up-to-date version
  - Keep the site up-to-date
  - Audit the content periodically
  - Ensure the owner of each section is clearly stated
  - Check the links to ensure they work

The team also gained valuable insights into how users consume content; these insights guided them in developing content rules, such as:

- Limit the use of PDFs to long reads; use HTML pages over PDFs, especially for short- to medium-length text
- Provide contextual summaries of long research reports
- Make web pages printer-friendly

Prototype Phase

Even after conducting all of this detailed analysis, team members felt they were still missing critical information that would help them optimize the content reorganization. So, in December 2015, they built a prototype: a Drupal instance with a very limited front end that would let them test and play around with the back end and content types. For two months, they iterated on the content type design, focusing on fields and attributes. They also focused on use cases, as they quickly realized that the first ones they had drafted were too loose. In an effort to remedy this, they ran various card-sorting exercises to test the content types and subtypes.

Next came low-fidelity mockups of the master templates (homepage, topic page, content types, departments). They usability tested these using interactive PDFs and held meetings to present, discuss, and get feedback from other colleagues.

In March 2016, team members started building the site's first staging version. Because editor trainings were set to start in May, they had the first editors use the staging version and populate it with real content. Editor feedback was crucial in refining both the front and back ends, so the design team spent time during this period improving the site's authoring experience.

Once the site had a sufficient amount of content, team members conducted another round of usability tests on the live site, along with a separate session for mobile tests. The mobile tests, especially, were critical in helping them spot bugs and errors.

INFORMATION ARCHITECTURE

IA: From Chaos to Order

The previous intranet comprised approximately 45 different sites, each with its own IA, look and feel, tone, and voice. This resulted in a disruptive experience for employees trying to navigate the site.

Previously, whenever an office had wanted to publish new intranet content on its work, a new project, or a section of the organization, it would request — and pay — IT for a separate site and, with little governance and only basic guidelines, they would build it.

The requesting parties decided the type of content, including the tone and writing style, the brand, the site navigation, and its maintenance. Some of these sites adopted a topic-based navigation, while others created their sections based on their position in the org chart (e.g., their unit or division name).

As the owners of the overall intranet, the Communications division reviewed these sites before they went live, but focused mainly on writing and labels — and often came in too late in the process (after IA was decided and content completed) to really be helpful. When the intranet was still quite small, this didn't seem like a huge problem, but by the time it had grown to 45 subsites, the gap in governance was clear, as was the need for a different approach.

A Unified Approach to Content Types

With the new intranet, the team took the opportunity not only to update the design and infrastructure, but also to change the way editors used the platform and to foster collaboration among them. The new intranet gives editors a set of content types to choose from: *News*, *Service*, *How Do I*, *Document*, and *Organization*, and each content type has a set of fields and serves a specific use case.

Because many people are reluctant to read manuals and/or consult guidelines on other platforms, the team decided to incorporate some guidelines into the CMS itself, so that editors could see them when they need them.

All editors from all offices use the same content types, and WFPgo is full of templated and standardized information that brings with it a number of benefits:

- Consistent information packaging and presentation
- Consistent naming conventions for similar content types (no more "resources" vs. "documents" vs. "key pages" vs. "tools" that all contain the same thing)
- Consistent look and feel
- Content type templates eliminate the need to code or style pages and for technical teams to maintain them

A tagging system lets authors feature any document on different site sections, depending on the associated topics. This prevents content duplication. Editors can also tag their documents with any topic they think is relevant, which also makes the documents appear on related topic pages.

Topic Pages

Topic pages are probably the most important pages on WFPgo, as every page is associated with at least one topic. The site has 18 main topics, some of which have many subtopics under them. Each topic and subtopic has its own WFPgo page, and the team built a hybrid approach to ensure these pages are populated with the most relevant content for users. This hybrid approach offers two options for curating pages:

- **Manual:** every link is on the page because an editor manually selected and added it.
- **Automatic:** every link is powered by Google Analytics (based on the number of page views) and then sorted alphabetically for display.

The automatic content population covers cases in which editors are not very active in curating their topic page(s); in such cases, the pages are not left blank, but will display the most-viewed content for that specific topic.

Taxonomy-Based Content Organization

The external company hired at the project's start carried out the first UX activities on the IA. It proposed a content structure that followed a single model of organizing information. For example, if users visit the intranet to access documentation, there will be a single access point to all existing resources and tools. When team members tried to apply these concepts to the organization's existing content, however, it didn't work, so they did further research on their own.

During the design team's usability tests on the old site, it noticed that users did not use a single navigation model, and that they frequently used the topic-based navigation. The problem with the old site's topic-based navigation was that it reflected the organigram (a graphical representation of the structure of an organization) too much, so it did not make sense to users — particularly non-HQ staff and new employees. Clearly, the team needed to reorganize the topics in a more straightforward way.

At the same time, a colleague in the Library and Research Office was working on a new corporate taxonomy to classify all of the corporate documents and replace the old document management system with a new one. The intranet team thus formed a project work group to collaborate and follow up on the corporate taxonomy, in anticipation of future integrations between WFPgo and the new document management system. Through this process, the team realized it could share the same taxonomy.

The taxonomy group engaged in a diligent process to create the new corporate taxonomy — including more than 100 consultations, interviews, and card-sorting exercises — which took about a year and a half. Card-sort exercises, done by the intranet team for a few key areas, revealed results that were not that different from the corporate taxonomy. The two teams ultimately agreed that the benefit of sharing the same taxonomy between systems used by the same editors and consulted on by the same people was more important than any minor differences, so the intranet group thus adopted the corporate taxonomy.

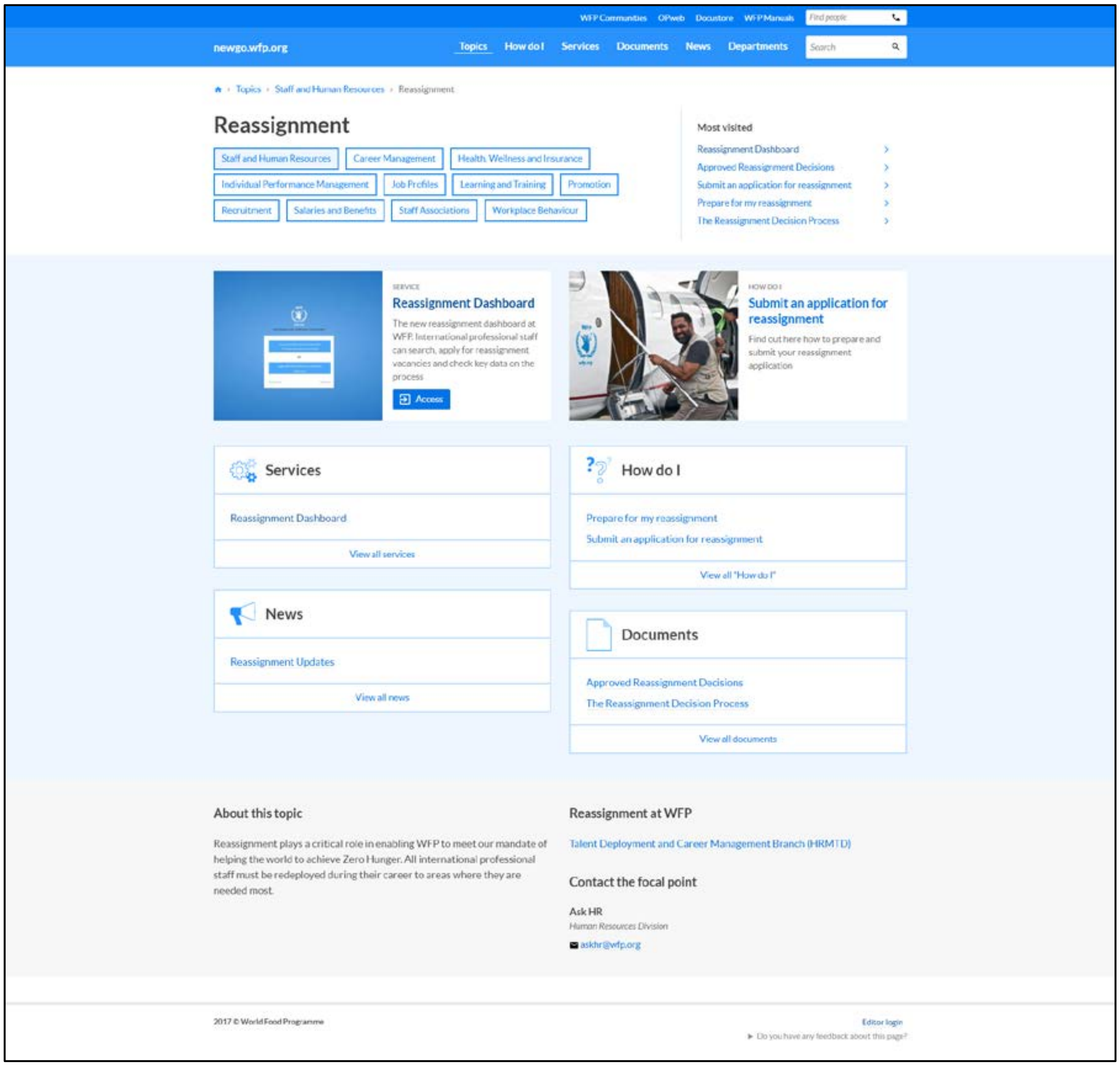


Image 148. WFP Intranet Subtopic Page. This is one of the WFPgo subtopic pages. This page **works like** the main topic pages and shows up on the parent topic page. *148_WFP_13_subtopic_page.png*

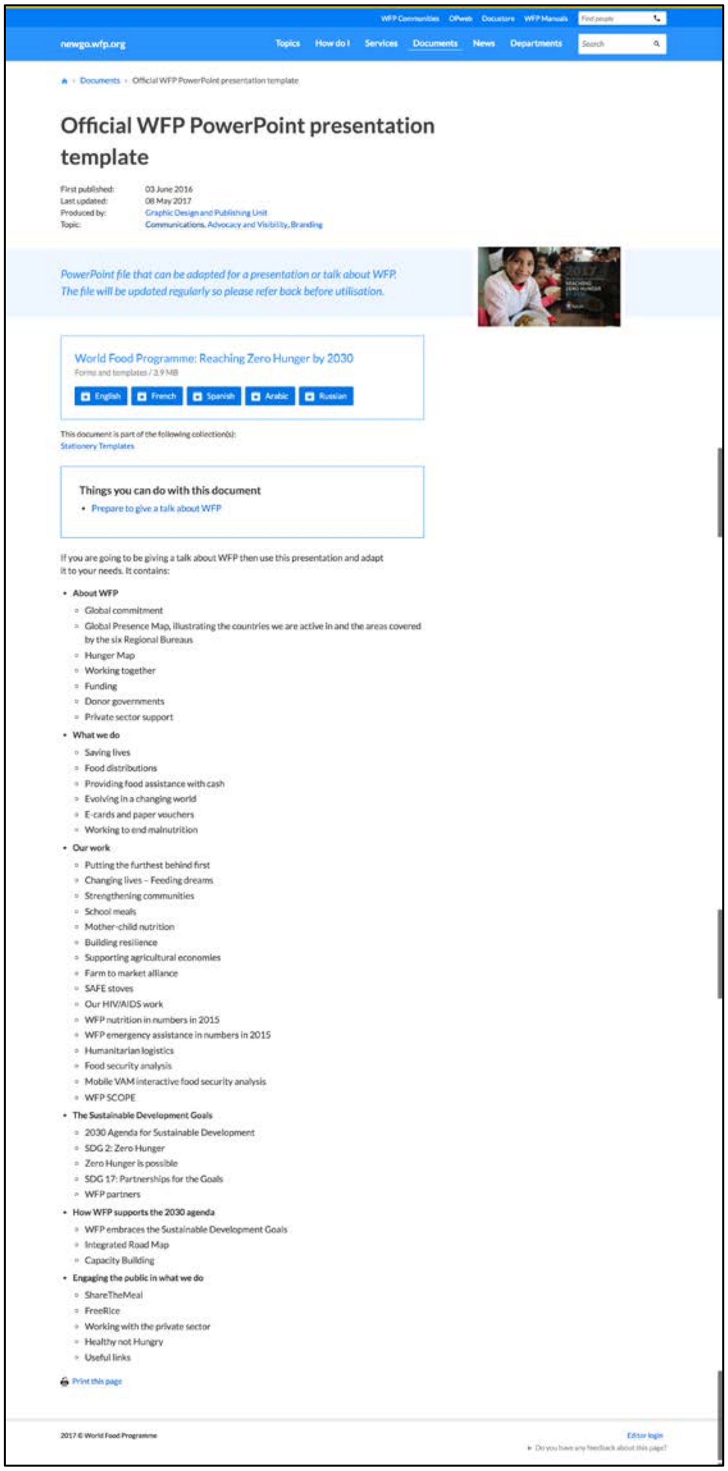


Image 149. WFP Intranet Document Page. An example document page. This content type is used both for publications and guidance type documents. The template lets users upload other language versions of the same document if available. *149_WFP_14_document_page.png*

Image 150. WFP Intranet Document Page Mobile View. The mobile version of the document page.
150_WFP_15_document_page_mobile.png

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Assist SpA	• Conducted the majority of user research activities, including site visits, surveys, field trips, and phone interviews • Identified pain points to fix • Delivered early blueprint for new site, a rough IA, basic content types, and suggested functionality
Crocstar Media Ltd	• Developed training courses • Worked with core team to develop a transition toolkit for editors • Delivered two-day training courses for all initial editors during transition
Nuvole Web SRL	• Developed and designed Drupal 8 site
Matthew Morek	• Built early front end

GOVERNANCE

Ownership

WFP's Communications division owns the intranet, and the IT division provides the server infrastructure. A small "shadow" IT team inside the Communications division built the organization's external website and donations platform, and the intranet team was able to leverage this expertise to rebuild the intranet.

Communications has owned the intranet since the 2009 rebuild, but IT handled all site development and maintenance; this led to what team members refer to as a kind of "split personality." For example, the Communications division looked out for content and news at the expense of IA or overall site coherency, while IT worked with other divisions to create new site parts without worrying about content or how it all fit together. This wasn't the fault of anyone individually — it was simply a weakness in the old governance model.

The redesign team tried to address this shortcoming by bringing design, tech, content, and training together under one team. The goal was for everyone to make intranet design decisions (and lead the minutiae of their development) in a way that was informed by user research and a closer knowledge of the site's actual content. Having that "full stack" understanding meant that team members ended up spending considerably more time thinking about how content types interact, what forms to show editors, and how to structure the back end than anyone anticipated at the start.

Governance Challenges

One area that has presented governance challenges is the funding structure. A division such as IT, which is regularly spinning up dozens of projects and doing tons of technical work with other parts of the organization, often has a mature funding approach that works in a variety of ways. It thus has more experience splitting costs. The Communications division didn't have the same kind of structure in place to create a clear path forward for long-term funding. It also lacked some of the data necessary to tell its own management how much the future long-term maintenance and development costs would be with any sense of certainty.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Core WFPgo team	• Build and maintain site • Deliver "Publishing to WFPgo" CMS training • Build and improve training • Manage stakeholders across the organization
Communications Content Team	• Spot check for content quality • Deliver training on writing for the intranet • Nurture the editor community • Promote stories and announcements on the front page
Intranet Council	• Endorse the project's overall goals and direction • Evaluate and recommend issues raised by the rest of the organization
Intranet & KM Working Group	• Decide how various intranets fit together • Coordinate roadmaps and shared issues
Managers of Content Owners	• Approve and commission content created by each topic and unit
Content Owners	• Create content for their topic and unit • Promote content on their topic page • Collaborate with other topic owners on joint content

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	http://newgo.wfp.org
Default Status	• The intranet is set as most user's default site, but some local IT policies might change this • Users can change the default if they want
Remote Access	• Users can access the site through HTTP tunneling or VPN

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
Early 2009	• Launch of a redesigned WFPgo, the "global office" corporate intranet
Q2 2014	• Decision made to reboot corporate intranet; early audits/research
Q4 2014	• Formation of intranet council; formal approval and funding granted
Q1 2015	• Project and user research begins
May 2016	• Beta version of new WFPgo online
November 2016	• Old WFPgo redirected to new site
Overall redesign timeframe: Mid-2014 to November 2016	

CONTENT AND CONTENT CONTRIBUTORS

Accommodating Diverse Content Managers

The intranet is focused mostly on global corporate information (for now), so most of the editors are located at the organization's HQ in Rome. This set-up is an advantage, because it allows for a small team that can train larger groups of people all at once. But it's also a disadvantage in that HQ produces a lot of guidance, a lot of documentation, and a lot of *words* — and the default expectation is that all of this will go online forever.

If a division hires an editor with considerable intranet or knowledge management experience, this problem tends to decrease. However, WFP is a voluntarily funded organization working across the globe, so not every division is lucky enough or able to focus so heavily on internal content and information. As a result, the organization has a community of editors with diverse backgrounds.

Training Editors Using a Transition Toolkit

In the past, deciding who became an editor was somewhat ad-hoc. With the transition to the new platform, the team decided early on to embrace everyone — regardless of title or background — as long as their division or chief nominated them as a WFPgo editor.

This meant the intranet team had to bring people from many experience levels through many workshops and a full two-day training program before they started working on the site. To help with that effort, the intranet team added a third member in the role of transition manager. He came on in April 2016, about two months before the beta site went live. The team also brought in Crocstar, a training and writing consultancy firm that worked extensively with the Government Digital Service team on GOV.UK.

Together, these two resources helped build the "transition toolkit" to bring editors through the process of doing user research, writing user stories, and planning out their content based on the results of that process. The team split the training into two days, with one day focused on using the new CMS and understanding the content types, and the other focused on how to write for the intranet.

The training for new editors is the same: two mandatory days.

A Cost-Recovery Training Approach

One unusual thing the WFP team has done is what it calls "cost recovery" training. It brought new editors through the initial training for free using the corporate funding for the rebuild. Then, because the team was unsure as to how many editors it would be dealing with long-term, it decided to create a structure where the various business units paid a small amount of money back to the intranet team. This will let it scale-up the team if support needs get too high, while still continuing to fund the site's development. A side benefit of this approach — at least so far — is that it has reduced the number of requests to just throw up a bunch of pages on the site. The team has insisted that editing intranet pages is a serious job worthy of intense training and a lot of work; by asking for money to change hands (albeit, only within the organization) editors are that much more prepared. It also keeps everyone focused on providing high-level support to all editors.

Starting from Scratch

In addition to changing the intranet's technology and look and feel, the rebuild project has thoroughly changed the way editors approach, produce, and present their content. The team did not migrate any pages from the old site. The new site was an empty container when it was set up, and the intranet team asked editors to go through a process dense in UX techniques when creating a new page. This involved the following:

- **Transition calendar.** The team planned a transition calendar and distributed all involved groups in 10 phases.

- **User research phases.** Each phase consisted of 2-3 weeks dedicated to user research and one week to define their audiences and the tasks they perform on the site.
- **Two-day training.** With the research data in hand, editors attended the two-day training (led by Crocstar) and learned how to turn their tasks and audiences into user stories. For each user story, editors compiled a list of user requirements that had to be fulfilled for the intranet content to meet the user need expressed by the user story. Then, the team sent the groups of editors a spreadsheet to record their user stories and user requirements, and assign priority to each item as follows:
    - **High:** user stories that *must* be available on the new WFPgo in the first release.
    - **Medium:** user stories that *should* be available on the new WFPgo in the first release.
    - **Low:** user stories that must be on the new WFPgo, but can wait till a later release.
    - **Nice to have:** user stories that would be helpful but are not essential.

Once the groups had this template ready, they were given another template to structure their web content using the WFPgo content types, with the help of mind maps and content summaries.

This is how the team approached and prioritized the content, whether it existed already on the old site or not.

The redesign was also an opportunity to audit all the old site's content and get rid of the oldest and most unhelpful information. Although the team did not track the percentage of reduction from one site to the other, it tried (and is still trying) to ensure that content posted on the new site always meets a user need.

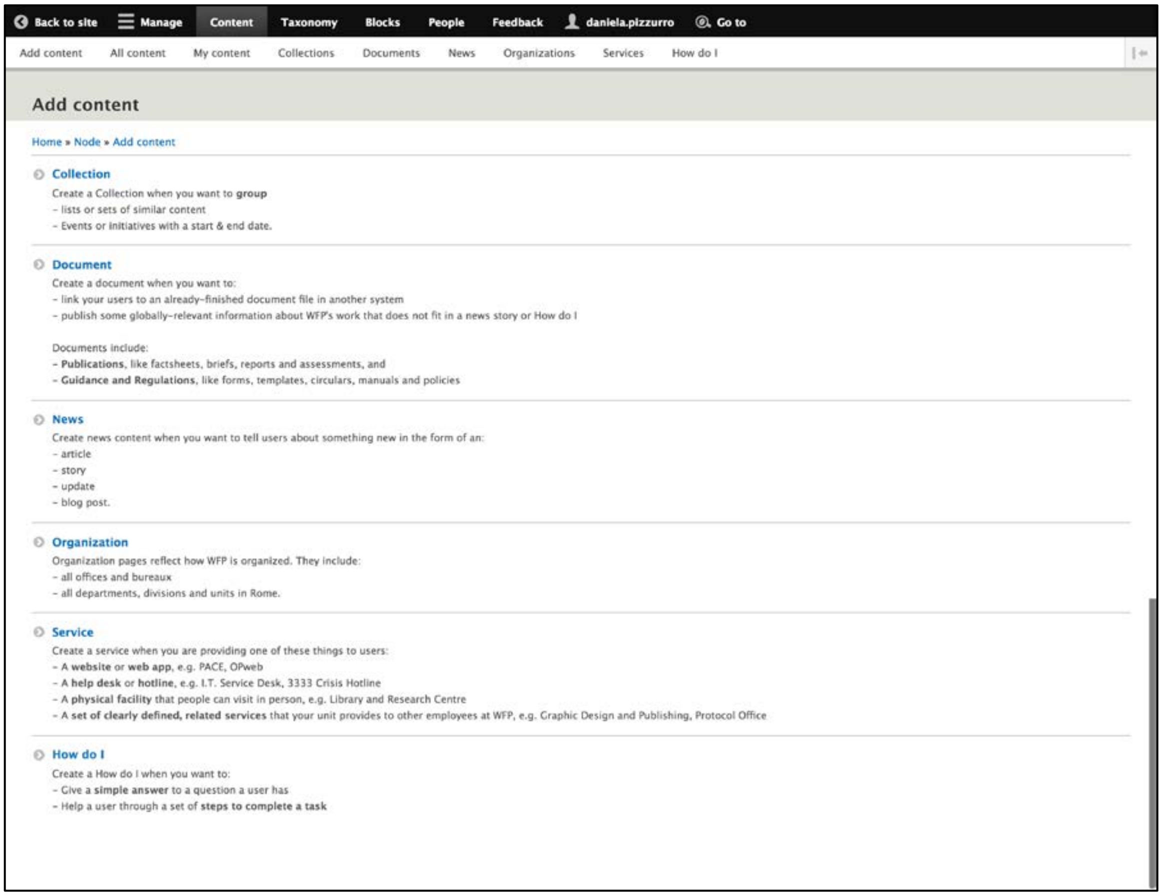


Image 151. WFP Intranet Content Types Guidelines. This page serves as a guideline for editors when they want to add new content. It reminds them which content types are available and the use cases for each type. *151_WFP_16_backend_content_types_guidelines.png*

WFPgo Editor Guidelines

The following list of steps summarizes a WFPgo editor's role and is available as a *How Do I* page on the new site:

> *If you are a WFPgo editor and need some guidance creating content, here are some steps to follow:*
>
> 1. *Before adding any new content to WFPgo, you must be able to demonstrate that there is a clear user need for it.*
>   - *If there is no user need and it's just content you want to push out to people to raise the profile, then we have <u>other channels</u> for it (this links to a page with a list of internal/external WFP channels to put content).*
>   - *Before publishing, you should have some data as evidence that people need your content. Here are some research methods*

you can use to gather data (this links to guidelines on how to use Google Analytics, FAQs, surveys, and interviews).

2. *After you have the data, you should write some user stories for your content. This is a technique we use for creating content based on user needs.*
3. *You can structure each user story into a piece of content using our user story template. You can see some guidance on which content types to choose here.*
4. *Familiarize yourself with some of the rules and guidelines for writing content on WFPgo that we have been posting to WFP Communities (and follow the intranet editors community while you are there).*
5. *Ensure that your content is accessible to users with disabilities and on low-bandwidth connections by following our accessibility guidelines.*

Obviously, with more than 100 editors, the organization had some editors who embraced this process and produced really good content, and others that either were resistant to accept the new process or did not write great content. The intranet team knew it wouldn't be easy to walk all the groups through this new process, but it also underestimated the amount of time and effort it would require. Having an experienced transition manager to take on a huge amount of this work on his own, with dozens of individual workshops, rewrites, and support, was invaluable.

Content Guidelines Example

The following guidelines were written to help editors understand the rules on how to use acronyms and jargon words in titles:

> *Today I'm going to talk about **acronyms and jargon in titles**. We love acronyms in WFP — by which, I mean we use rather a lot of them. But we hate acronyms in Communications, because not everyone knows what they mean.*
>
> *And let's face it, some acronyms are just **plain silly**. In a previous a job I once had to resist pressure to call our new intranet site COLIN (after City Of London INtranet). But I digress.*
>
> *Sometimes acronyms can be useful, and sometimes more people know what the acronym means than what its letters stand for. Our three most popular **search terms** on WFPgo are LMS, DSA and PACE (*), so we shouldn't try and get rid of them altogether, because we know people use them.*
>
> *So **when** to use acronyms and when **not** to use them?*
>
> *We already have some guidelines about using acronyms in documents in our editorial style guide. You should always spell them out in full at their first occurrence in text.*
>
> *In this post I'm going to provide some rules about **when to use them in titles**.*

Titles are very important on the new WFPgo. We spend some time teaching how to write good ones in our training session. The new WFPgo is more text-based than the old one. You need to write good titles and short descriptions (the strapline in larger text underneath the title) so that they ***catch the eye of users*** *when they scan text.*

Titles appear in search listings and on topic pages. Keywords in titles also weigh more heavily in search results, so you need to make sure the important keywords that people are typing in appear in the title or short description. As we saw, people ***do*** *type acronyms into the* ***search engine****, so we do need to use them, but where and when?*

The ***rules*** *are quite simple:*

How Do I's

- *Acronyms or jargon words (specialized words that only a few people know) are not permitted in titles, unless:*
    - *You have data to demonstrate that people are searching for them.*
    - *You explain the acronym in the title, so that users would still understand what the title meant without the acronym (e.g. "Complete a performance review or PACE" would still be clear if you called it "Complete a performance review").*
- *If the acronym is commonly used within WFP and you don't use it in the title, put it in the short description to help with search results.*
- *If you use an acronym, spell it out in full in the short description, followed by the acronym in brackets. For example, "Cash-Based Transfers (CBT)".*

Documents

- *If the acronym is commonly used within WFP, it can be used within a document title, provided you have data to demonstrate that people are searching for the acronym.*
- *If you do you use an acronym in a document title, then make sure you spell it out in full in the short description, to help users when scanning search results.*
- *If there is space in the short description, then describe what the acronym means, too. For example, "Purchase for Progress (P4P), the program to support smallholder farmers."*

I hope you find this useful. We will be ***feeding back*** *to each of you individually whenever we come across any examples of acronyms and jargon words that are not being used appropriately, so if this means you, then please help us out by changing it before we do.*

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Standard LAMP • Red Hat Linux
Bug Tracking / Quality Assurance	• Jira • Jenkins • Gitlab CI
Design Tools	• Balsamiq • Photoshop • Paper prototypes
Site Building Tools	• Composer • Drupal 8
Content Management Tools	• Drupal 8
Search	• Apache Solr
Other Functions	• Optimal Workshop

ROI

After an array of user research was carried out both by the internal team and the external company, team members had a better sense of which goals they ultimately wanted to reach with the redesigned intranet. They then broke down each goal into smaller ones, and defined KPIs for each that they could use to measure against. They also took an exhaustive approach to creating and measuring ways to gauge how the new intranet's various improvements were moving the dial; these measures are outlined as follows:

SHORT-TO MEDIUM-TERM GOALS			
Goals		**KPIs**	**Baseline for 2016**
Ensure Employees Receive Important Corporate Communications	• Improve findability of information • Fix intranet tech issues, such as slow speed and broken search • Enable mobile access	• Usability tests • Use of search vs. browsing (%)/search refinement • Page load time • Sessions from mobile devices	• 6.25% of visits used site search • 26.5% search refinements • Average page load time 5.60 seconds • 2% visits from mobile
Foster Collaboration	• Reduce organizational silos • Reduce duplication	• Number of coauthored topics or pieces of content	Cross topics • 21/121 *How Do I* pages • 14/72 *Services* pages • 32/656 *Documents* • 12/50 *News* Co-authored • 12/121 *How Do I* pages • 14/72 *Services* pages • 94/656 *Documents* • 17/50 *News*
Provide Trusted, Reliable Information	• Make content easily readable (plain English) • Audit and update content regularly	• Readability score • Date on pages and documents	

Measuring Metrics Over Time

Six weeks after the launch, the WFPgo team measured a series of metrics on the new site and compared them with the old intranet over the same time period the previous year. They found that:

- The number of sessions on the new site increased by 35.29%
- Users increased by 3.66%
- Page views increased by 4.45%
- Search use increased by 33.92%

Five months after launch, the team collected and analyzed data again against the old site and over the previous year's time, and found the following results:

- Sessions increased by 28.85%
- Page views by 1.21%
- Search use increased by 55%

The sessions and page views were significantly higher compared to the old site right after the launch (possibly due to the communications around the launch time and employee curiosity), and then slightly decreased (or simply normalized) over the following few months.

In contrast, the use of search continued to grow over the months. The designers read this positively as an accomplishment of one of their main redesign goals (fixing the search engine), as many users can now better rely on it.

Looking at the homepage news, they noticed an increase of views that varied from 30 to 150% by comparing stories published on both platforms (old and new) on the same topic.

Readability Improvements

Readability has also improved on the new site. The team calculated and compared the readability score for three of the top tasks on the old and new sites as follows:

READABILITY IMPROVEMENTS			
Task Name	**Content type**	**Score* old GO**	**Score* new GO**
Sick Leave	*How Do I*	22	55
Building Pass	*How Do I*	45	69
Calculate DSA	*How Do I*	43	55
Based on Flesch reading ease: **100–90 very easy to read; **90–80** easy to read; **80–70** fairly easy to read; **70–60** plain English; **60–50** fairly difficult to read; **50–30** difficult to read; **30–0** very difficult to read. WFP is aiming for a score higher than 50 on the new site's How Do I pages.*			

Site Speed

To measure site speed, the team compared metrics on approximately 20,000 page views and found that it now takes 2.7 seconds less to load pages.

It also measured the improvements on site speed for a low bandwidth country (South Sudan) and a high bandwidth country (Italy):

Country	Metric	Old WFPgo	New WFPgo
South Sudan	Average page load time (in seconds)	7.99 sec	3.27 sec
Italy	Average page load time (in seconds)	2.66 sec	1.39 sec
In South Sudan, the page load time has been reduced by 59%; in Italy, it has been reduced by 48%. This results in actual staff time saved to perform tasks on the site.			

LESSONS LEARNED

WFP team member Jordan Cox, the Intranet Project Manager, shares some of the many lessons team members learned through the redesign effort, as well as the best practices they found along the way:

- **Governance is always tougher than you expect.** "Even if you think you're getting it right, it's always harder than it seems. There can be so many competing voices and priorities in an organization that it really helps to give your governing body or council some kind of formal decision-making power that gives them the power to decide something and then move on. We went with more of an 'endorse the direction of travel' way of governing, and it meant that there were a few times when we hit a tough issue (groups not happy with the corporate taxonomy, or the minimalist design, or various other things) and we didn't have a clear way of coming to consensus on it. This doesn't mean you need a really complex decision-making matrix, necessarily, but it does mean as much clarity as you can get on the types of decisions the governance group needs to definitively make."

- **User test as much as you can and as often as possible.** “If we had a bigger team, we probably could have tested a lot more. We did a lot of research, but I definitely would have built more explicit testing days/phases into our mockups, our prototypes, and our early versions. The ROI is so much higher compared to the amount of time I spent on stakeholder management, building business cases, and other work that’s important, but there is really nothing like testing stuff in terms of insights-per-hour you get from it. As the project lead, if I were doing it again, I would force myself to run regular usability tests — as in: I’d run them personally alongside our UX Manager and others just for the value and insight it brings.”
- **Taking a strict UX approach to content development is both time- and resource-intensive.** “I underestimated how hard it would be to get dozens of editors on board with some of the UX-centric concepts we were pushing in our transition toolkit and training courses. We spent a lot of time getting them to write user stories and user requirements as a way of planning out their content, and at the very start I really underestimated both 1) how much additional pre-work this would feel like to a lot of editors, and 2) how hard it would be introducing concepts that originally came from UX — and, to some extent, from software development — into the act of writing. Unless you have someone following up and reminding editors on a regular basis that using these techniques really improves content and keeps the intranet from just becoming a dumping ground, people will start to ignore them and just put stuff up.”
- **Editors’ skill level will vary widely, so plan for that reality.** “We agreed to train anybody, and I wouldn’t change that, but there is still a big gap between a digitally savvy web editor who has worked on big websites before and someone who has just been asked at random to ‘update some stuff on the intranet’ alongside six other jobs, and it’s tough to bridge that gap, even with a great training program and ample support.”
- **Just because you build it doesn’t mean they will come.** “A responsive, mobile-friendly site is not going to see a lot of mobile usage without some effort. We went all the way into 2016 without a mobile-friendly intranet, and we’re still behind the firewall when staff are out of the office, which means more steps to access the site, so the mobile usage numbers are not up where we thought they would be when we started the project, and still represent a tiny number of our overall users. I expected mobile usage would just jump up automatically as soon as we told people: ‘We have a mobile friendly intranet,’ but I was wrong on that.”

- **Decommissioning old sites always takes a lot longer than you think.** “The idea that you’ll be able to wrap up the old domain and switch the new intranet over to it in 6–12 months? Not so realistic. If I had known this in advance, I wouldn’t have gone with ‘newgo’ for the URL, because it’s been over a year since our beta went online, so it’s not really that new anymore, and will be more of a pain to redirect down the road now that we have thousands of newgo.wfp.org pages.”
- **Having a single taxonomy structure across the organization has its advantages.** “We used the corporate taxonomy as our information architecture, which helped us in a lot of ways, including better governance. We could point to other systems using it, which makes it harder to interfere with; better links; and integrations down the road. At the same time, a taxonomy designed to work on multiple systems is going to have certain terms that aren’t really perfect for an intranet. But I don’t think we would have decided differently. Having multiple taxonomies is just a drag.”
- **Take a deep dive into the content very early in the project.** “I would recommend getting your hands dirty with the content on your current intranet as soon as humanly possible in the project, and thinking of it from both the IA and content type perspective. This was surprisingly difficult, because the pages on our old intranet were a mix of things, there were no real ‘content types,’ everything was kind of multifunctioning and doing its own thing. If I had listened better to advice and really started auditing and looking at some of the existing content on the current intranet in a deeper way earlier on in the project, I think we would have realized we needed some content types far earlier (such as *Collections* to bundle up existing pages) than we did, and some of the thinking on how the various content types relate to each other at the CMS level would have been done earlier. As it was, we were well into our early prototype before we had fully figured out how the *How Do I* pages would be supported by the other ones, or exactly what was needed on a collection page.”
- **Tackle the integration specifications early.** “We found that not planning out and doing the specs on the various ways your intranet will integrate with other systems means that these integrations keep getting pushed down the road because other stuff becomes more important. And, as you keep growing and building the site, doing something big like a deep integration with another system becomes harder, as you have more complexity to your site by this point. It’s good to prioritize the really important integrations and spec them out as early as you can.”

Best Practices

- **Bring in a transition expert.** "Bringing on someone experienced to help with the transition and really dedicating time to editors was a huge benefit. Mark's experience in doing big site transitions in the past made a huge difference to the project when we had trouble getting our heads around the scope of what we were trying to do with such a small team."
- **Find champions.** "The combination of extensive user research and an intranet council that endorsed our principles really made a big difference in stakeholder management. It helped us make some bold choices that people could get behind."
- **Trainers must be UX focused.** "Bringing in trainers who are on the cutting edge of user-focused content, especially public service content, really gave us some perspective on what we were trying to do that helped immensely. The GOV.UK project was huge, far bigger than ours, but the team doing it was proportionally not that big. So having advice from Crocstar, which had worked so closely with a lot of the members of the team doing that transition, was just hugely helpful in helping us bring our 100+ editors over to the new system."

List of Images

The following images appear within the pages of this document and are also provided as standalone image files in the ZIP folder included with the purchase of this report. The file name listed after each image caption corresponds to its accompanying image file in the ZIP folder.

Intranet Design Annual Winners Through the Years

2018: FIVE COUNTRIES AND EIGHT INDUSTRIES

North America has a strong showing in this year's annual, with the US and Canada producing seven winning intranets between them. Also in the top 10 are three European organizations, with one each from Italy, Poland, and the UK.

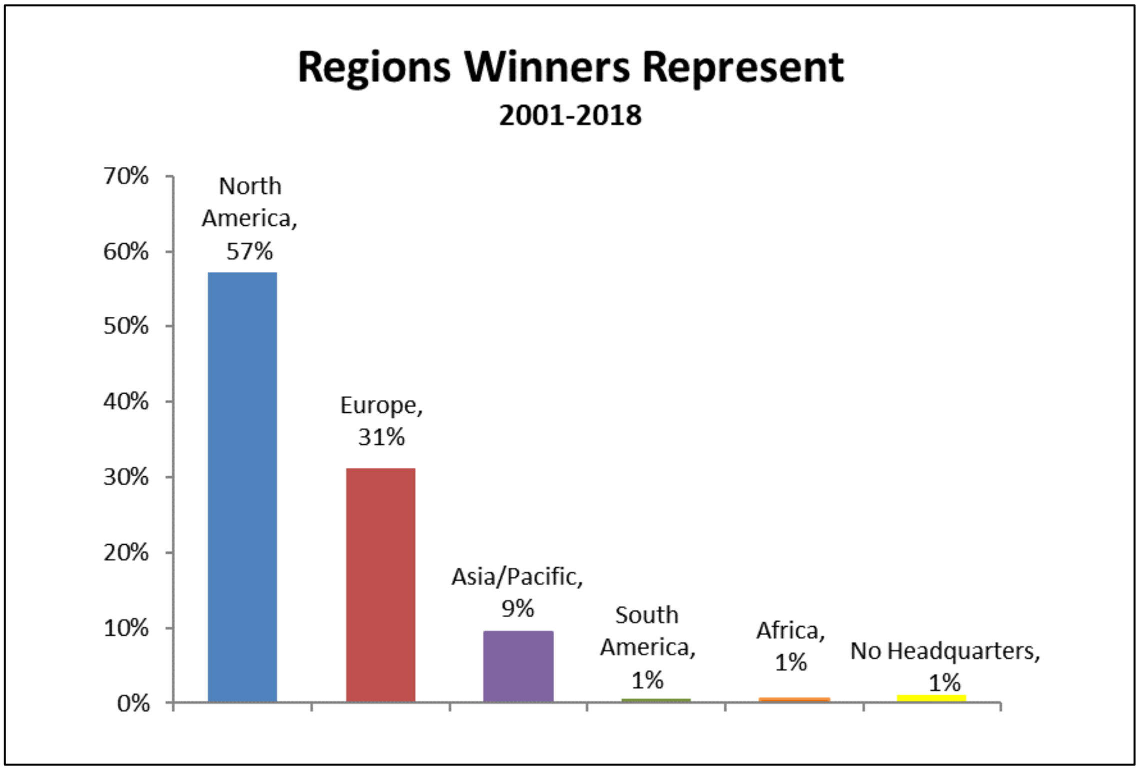
DESIGN ANNUAL 2018 WINNERS BY COUNTRY	
Country	**Number of Winners**
United States	5
Canada	2
Italy	1
Poland	1
United Kingdom	1

Design Annual 2018 Winners by Country

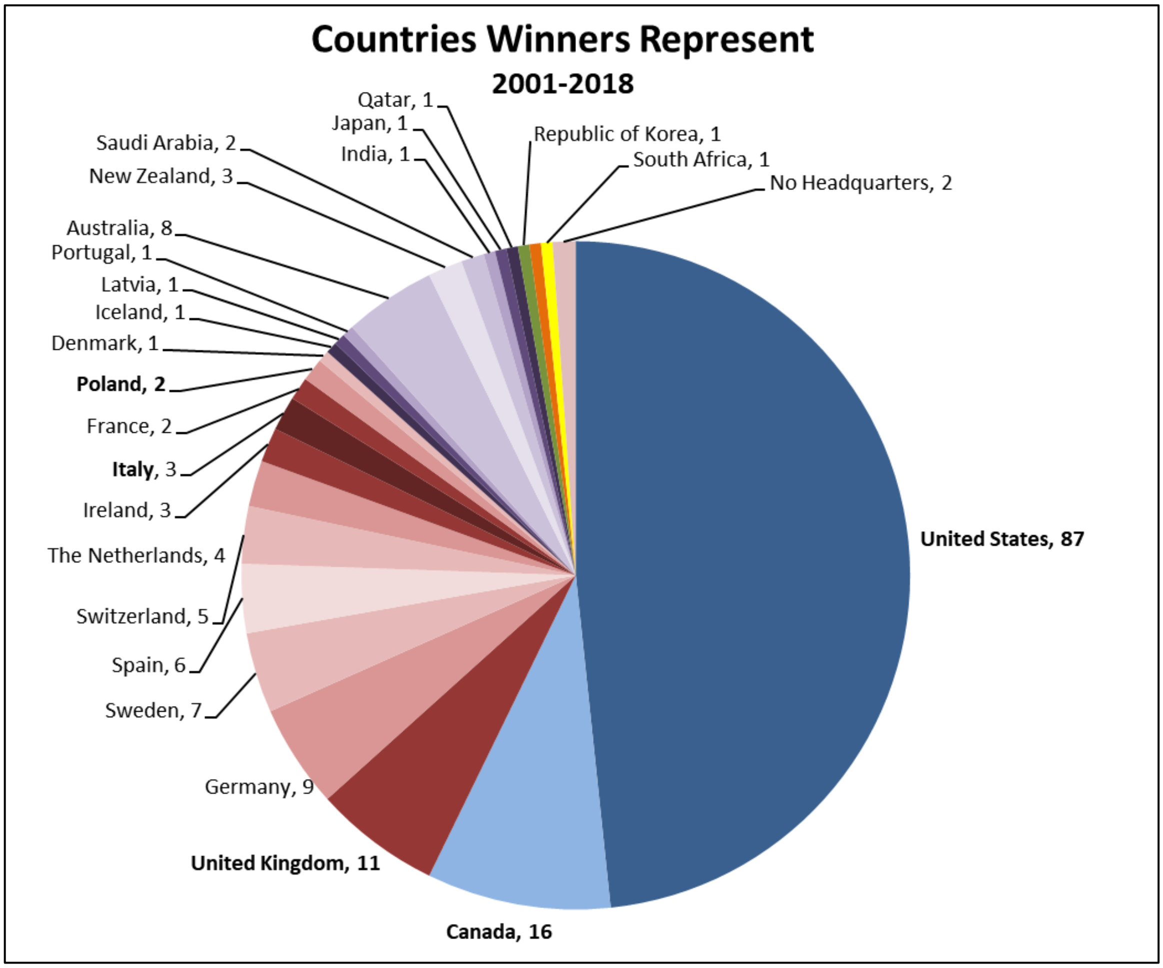
The world regions and respective percentages of winning organizations across the Intranet Design Annual's history are:

- North America (56%)
- Europe (31%)
- Asia/Pacific, including the Middle East (10%)
- South America (1%)
- Africa (1%)

Two organizations, representing 1% of all winners through history, claimed no headquarters. One was a global network of organizations, and the other considered itself global and not located in any specific country.



Regions Winners Represent: 2001–2018. The world regions and respective percentages of winners across the history of the Design Annual are North America at 57% (103 winners); Europe at 31% (56 winners); Asia/Pacific, including the Middle East, at 9% (17 winners); South America at 1% (1 winner); Africa at 1% (1 winner); and 1% (2 winners) claiming no official regional headquarters.



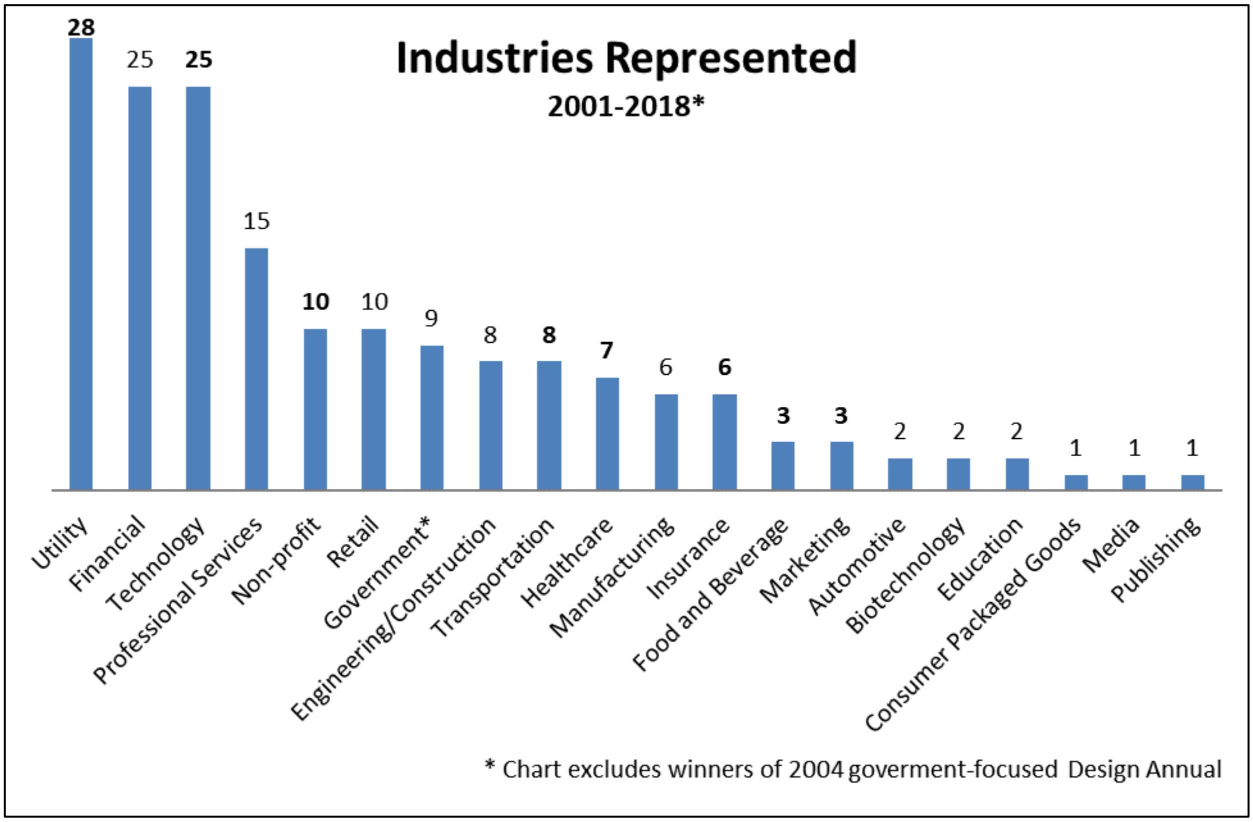
Countries Winners Represent: 2001–2018. Winning organizations come from 25 different countries. Moving clockwise from the top, countries are grouped by region as North America, Europe, Asia/Pacific (including the Middle East), and South America. The countries of the 2018 winners are shown in bold.

This year's winners represent eight different industries. Utilities retain the top spot as the winningest industry, aided by a win by Encana. Bank of American and Santander keep the financial industry in a close second.

The industries and their respective winner counts for 2018 are:

- Nonprofit (2)
- Utility (2)
- Food and beverage (1)
- Healthcare (1)
- Insurance (1)
- Marketing (1)

- Technology (1)
- Transportation (1)



Industries Represented: 2001–2018. This year's winners represent eight of the 20 different industries recognized throughout Design Annual history. The industries and their winning counts for 2018 are nonprofit (2), utility (2), technology (1), transportation (1), healthcare (1), insurance (1), food and beverage (1), and marketing (1). Numbers in bold above indicate that the industry produced a winning site this year.

Intranets Not Selected: Common Issues

The intranets in this report might make designing a great intranet look easy. But it is not easy. Ill-equipped teams, missing executive support, lack of leadership and focus, the use of common but bad UX design patterns, politics, technology limitations, impossibly short schedules, and a slew of other issues and distractions often and easily foil intranet teams that have the best of intentions. Negative factors such as these lead to poor intranet design. Following are examples of unfortunate design elements we found among some of this year's non-winning submissions.

OVERUSE OF GRAPHICS AND ICONS

Graphics, photos, and illustrations can effectively communicate and engage users. Further, mixing various visuals can add interest to a page. But using images and icons just to have them is not good design. Some sites add so many images, illustrations, or icons to a page that it simply looks chaotic and off-putting.

Choose graphics specifically to communicate, engage, or offer information.

INDECIPHERABLE ICONS

As with using too many illustrations, the use of poor icons is rampant on intranets. Icons used as global navigation links unaccompanied by text must be perfect to work well. And, while you might be able to create one or two perfect icons, it's nearly impossible to make many perfect icons for many commands. As a result, some are likely to be indecipherable. The same is true of icons assigned to every topic on a page or in a menu; they're often likened more with garbage than with eye candy.

It's almost impossible to come up with a good icon for everything, so don't try. Use icons when they will help users locate or make sense of a text label or help them more quickly accomplish a highly repetitive task. With each icon, always include a static text label (not just on hover).

HARD-TO-READ TEXT

Why oh why is tiny, light gray text on a lighter gray background still happening? Yes, it can be nice-looking. But. It. Is. Illegible.

Offer text in a readable size. Choose a background color with high contrast.

If you have great eyesight, try the squint test: squint at the screen or device and see if you can still read the text. If you can, good. If you can't, experiment with a larger size and/or higher contrast.

CASCADING MENUS

Collapsing the global navigation in a phone UI is acceptable. It is not acceptable in the desktop UI because it requires users to click to reveal commands, and they might not see or understand the icon or word that opens the menu. Also, the desktop's large screen can accommodate horizontal menu commands that advertise what the site offers. So why not take advantage of that?

Another reason a collapsed menu is an issue on desktop is that it tempts even good designers to digress and implement cascading menus — something we saw too often in this year's non-winning entries.

Cascading menus are usually finicky, and they are difficult and annoying to use.

On desktop, use a horizontal global navigation. On phones, use an accordion menu that is open by default or collapsed under a *Menu* button.

TOO-CUTE/BRANDED TERMINOLOGY

Intranet designers don't need to fabricate fun, catchy names or brands for intranet sections. Cute terms are often meaningless to employees until someone tells them what they mean.

Name the site's links, menus items, and headings for the task or topic they relate to and use natural, clear language.

BIG COLORED BLOCKS WITH TINY TEXT

Mobile-first has challenged and advanced creativity for many designers. If nothing else, designing for a small screen helps designers focus on what belongs there. Further, responsive design has pushed designers to rethink pages in modular sections that can shrink and flow differently on different devices. This often means placing content in colored blocks or boxed-off sections, which can work nicely on intranets.

However, one related pattern is a big colored box containing a small heading or subheading and seemingly unrelated text or links below it. Imagine a page with chunks of text as well as big yellow boxes splattered all over it. It doesn't make sense. Seeing a bright yellow rectangle containing illegible text just hanging on the page does not create a visual hierarchy for page content. Nor is it scannable.

Use a grid layout for the page. Ensure that headings are clearly related to the sections below them. For example, place colored backgrounds and borders around section titles as well as the related content below. And make the headline text's size proportional to any box it is housed in.

REALLY SKINNY SCROLLBARS

Some designs offer information in chunks on pages that might be all visible or might require scrolling. Either way is fine, but scrollbars that are very subtle and super skinny are difficult to find and click or tap.

To ensure that your scrollbars are visible and large enough to click and tap, test the design with users.

DASHBOARDS THAT ARE NOT SCANNABLE

Dashboards can help employees stay abreast of statistics, alerts, benchmarks, and more. But presenting numbers without labels that tell users what they mean is not helpful. Nor is offering really small labels.

To design a dashboard well, decide what users need to know when quickly scanning it and visually prioritize those items.

INDECIPHERABLE THUMBNAIL IMAGES

Many organizations are accumulating a library of images of products, events, locations, people, and more. This is great. However, some of these images are large; when used as thumbnails with article headlines or page topics, they become illegible on desktop and phones.

Crop to the best part of the image when using it as a thumbnail.

WATERMARKS ON PAGES

Watermarks can add visual interested to a page. But grainy background images on pages make them look like they jumped out of the year 2001. It's difficult to make a watermark look modern, and even more difficult to ensure that any content that appears over that watermark is legible.

Skip the watermark unless you can usability test it and iterate the design. At the very least, put a plain background over the watermark and behind the most important content.

Selection Criteria and Process

Nielsen Norman Group's Intranet Design Annual rewards great examples of useful, usable intranets that help organizations and meet the needs of people using them. To find these intranets and their teams, we post a call for entries each year in May on our corporate website, www.nngroup.com.

To enter, organizations — either the design firms responsible for the intranet or the organization's own intranet team — submit background information about the organization and a brief description of the intranet, including its features, functions, and users, and what makes it unique.

We review each entry, then judge and select the winners based on a four-step process:

1. Initial design reviews and numeric rankings
2. Follow-up questions with the top submissions
3. In-depth design reviews on the top entries to choose the top 10
4. Follow-up interviews with the top 10

Each step is detailed below.

INITIAL DESIGN REVIEWS AND NUMERIC RANKINGS

The judges (see the *About the Authors* section below) conduct baseline design reviews and narrow the field down to tier-one submissions. We rate each site numerically and note any great or missing features and qualities. We base the numeric rankings on criteria typically viewed as key to good intranet design, including criteria that have emerged from submissions or trends in previous years. We rate each submission on a scale of 0–5, with 5 being the best rating. Criteria include the following:

Navigation

- Global navigation on every page
- Consistent, easy navigation
- Clear hierarchy
- Consistent style across the intranet
- Horizontal scrolling and swiping used appropriately
- Expected page layout and appropriate vertical scrolling

Design

- Modern, pleasing aesthetics
- Uncluttered but thorough pages
- Page hierarchy and priority
- Brand support (without over-branding)

- Engaging and helpful homepage design
- Good contrast between text and background
- Good use of graphics
- Legible text
- Distinct headings and links
- The right amount of text and links

Search

- Consistently available search
- Employee directory or directory search
- Clear relationship between site and employee search
- Good search design (ideally, a simple open field at the top of pages on desktop and tablet, and a magnifying glass on phones)

Personalization and News Delivery

- Personalization and roles, catering to different offices or cultures
- Organization-related news and information
- Information about internal groups

Content

- Well-written text
- Appropriate, engaging tone of voice
- Content management, content curation, and editorial team management
- Information that meets business needs

Collaboration and Social

- Social that is helpful, not just present
- Content posting and editing capabilities for all employees
- Rating, commenting on, and sharing content

Desktop and Mobile

- Mobile offering that is suited to a small screen
- Desktop that takes advantage of a large screen (and is not simply the same as mobile)
- Mobile takes advantage of device features, like the camera and location

Overall

- Accessibility
- Simple forms
- Support for the main corporate functions
- Encapsulation of the organization’s spirit
- Use of innovative, fun, or original features
- Accessible to all users
- Useful mobile offerings
- Originality or “something special”
- Challenges faced compared with output achieved

About the Authors

Kara Pernice is Senior Vice President at Nielsen Norman Group and co-created NN/g's Intranet Design Annual with Jakob Nielsen in the year 2000.

Kara works with clients in a variety of industries to derive UX strategy and produce designs that meet business goals. In her more than 25 years of experience in UX management, strategy, research, and design, she has led many intercontinental research studies, authored a variety of research reports, and coauthored the book *Eyetracking Web Usability*. Called an "intranet guru" by *The Wall Street Journal*, Kara has lectured around the world on intranets and a wide range of other topics. Before joining NN/g, she gained invaluable experience pioneering UX and building and managing UX teams in an assortment of development environments, and established several successful UX programs.

A champion for usability, Kara chaired the Usability Professionals' Association 2000 and 2001 conferences, and served as 2002 conference advisor. She holds an MBA from Northeastern University and a BA from Simmons College.

Amy Schade is a Director at Nielsen Norman Group with more than 20 years of experience in usability, user research, and website design and development. She leads research and authors reports, and teaches courses on the usability of intranets, mobile websites and applications, responsive design, emerging design patterns, and e-commerce. She has co-authored the *Intranet Design Annual* since 2010. She also runs Nielsen Norman Group's Online Seminar program.

Schade works with clients large and small in industries including telecommunications, e-commerce, nonprofits, government, education, and publishing, including extensive work on corporate intranets. She has conducted worldwide user research, including longitudinal studies, remote studies, accessibility studies, and eyetracking research, and has run studies in the United States, Canada, Europe, Asia, and Australia.

Before joining NN/g, Schade worked as an information architect. She previously held a variety of positions in advertising and web production. She holds a master's degree from the Interactive Telecommunications Program at New York University and a BA in communications from the University of Pennsylvania.

Patty Caya (www.pattycaya.com) is a freelance journalist (writer and editor) and an award-winning digital media producer. In her business writing, she specializes in topics relating to usability (including social media and mobile design) and the business and technology of the web. She has co-authored the *Intranet Design Annual* for NN/g since 2008. She wrote and edited the report, *Mobile Intranets and Enterprise Apps*, and the 1st and 2nd editions of *Social Features on Intranets: Case Studies of Enterprise 2.0.* She also authored the 3rd, 4th, and 5th editions of the intranet portals report and contributed to the *Application Design Showcase* (2nd edition).

For more than a decade, Caya has split her time between journalism projects and web consulting. She is an experienced content strategist and interaction designer. 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 nonprofits. She has a BFA from New York University's Tisch School of the Arts and has completed coursework in the User Experience Program at Bentley University.

Acknowledgements

Thank you to the designers and organizations associated with the 10 intranets in this report. We appreciate them for submitting their work, cooperating in interviews, reviewing the report, and mostly for their exceptional intranet designs.

A special thank you to all the organizations that entered their intranets for consideration.

Thanks to Jeanette Pidanick for her assistance throughout the review process, to Susan Pernice for helping us refine that process, and to Keri Schreiner for editing this report.

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Have a great intranet? Large or small, you could win next year's Intranet Design Annual competition. But you must enter to win.

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The competition opens in early May 2018, and the deadline is at the end of May. Check http://www.nngroup.com/intranet-call-for-entries/ for the exact deadline and submission guidelines.

Eligible designs include anything currently running inside a company that is not accessible on the public web, including:

- Company-wide intranets
- Department-specific intranets
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- Internal web-based applications
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