# Intranet Design Annual 2020
## The Year's 10 Best Intranets

January 2020

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# NN/g

## Nielsen Norman Group

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# Executive Summary

## ORGANIZATIONS

Following are the organizations with the 10 best-designed intranets for 2020:

- **Angelini Holding SpA** (Italy), international group leader in the health and well-being area of the pharmaceutical and mass-market sectors

- **Bank Spoldzielczy we Wschowie** (Poland), cooperative bank serving three Polish provinces

- **Barclays** (UK), financial institution that moves, lends, invests, and protects money for customers and clients worldwide

- **Consolidated Edison, Inc.** (US), one of the Unites States' largest investor-owned energy-delivery companies, providing a range of energy-related products and services

- **Dynacare** (Canada), one of Canada's largest health solutions companies, offering services that include medical testing, insurance solutions, corporate wellness programs, advanced genetic testing, and digital health solutions

- **Husky Energy** (Canada), integrated energy company with 30 office locations across Canada, the US, and Asia-Pacific

- **Korn Ferry** (US), global organizational consulting firm, helping companies design their organization's structure, roles, responsibilities, compensation, and development

- **Loblaw Companies Limited** (Canada), Canada's largest retailer, providing grocery, pharmacy, health and beauty, apparel, general merchandise, financial services, and wireless mobile products and services

- **United Nations** (US), international organization that takes action on the issues confronting humanity in the 21st century and offers a forum for countries to come together to tackle these challenges

- **Wellcome Trust** (UK), a health organization that supports researchers, campaigns for better science, and exists to improve health

## NORTH AMERICA LEADS THIS YEAR

Of the 10 winning teams, six hail from Canada and the US, with three from each country. Both countries have always had a large number of submissions and a strong presence among the winners. Since 2001, the US has supplied 95 winners and Canada has supplied 19—but this is the first time a majority of total winners have been from one region.

## MULTIPLE INDUSTRIES HAVE A STRONG SHOWING

Four industries made an equally strong showing this year, with two winners each. Utilities and resources remain the most winning industry, with 33 winners (17%) since the start of this contest. This year's two utility winners are Consolidated Edison and Husky Energy.
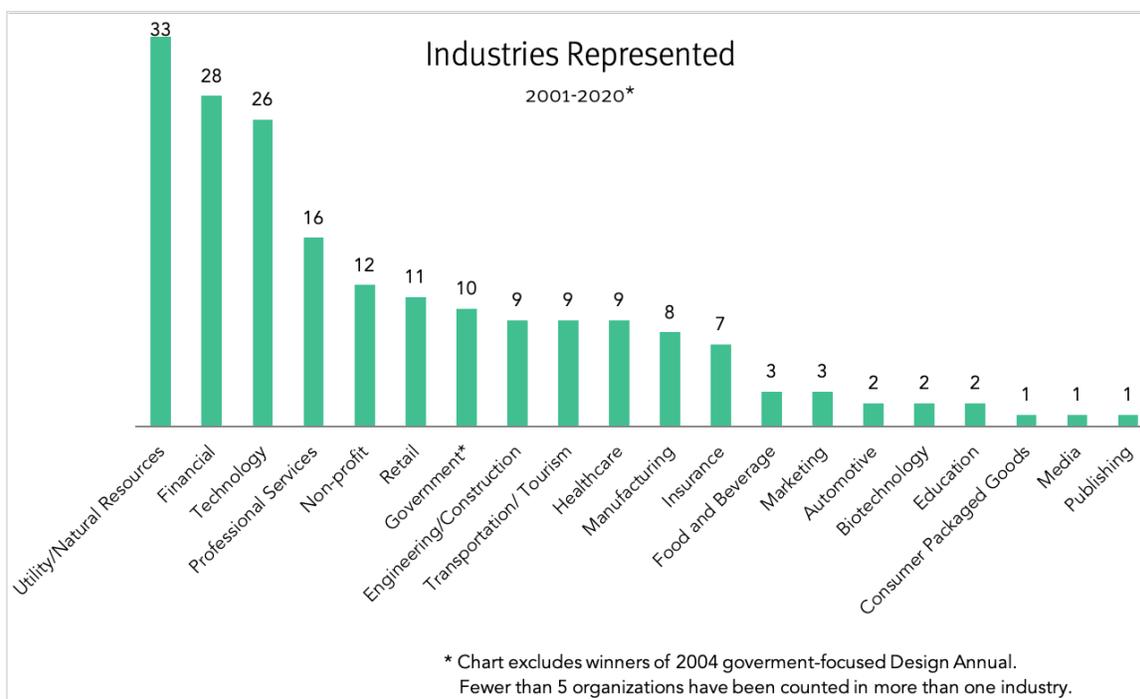
Finance continues to be solidly represented, and is the second most-winning industry since the start of this contest, with 28 winners (15%). The two winning financial organizations this year are Bank Spółdzielczy we Wschowie and Barclays.

The UN, which formally refers to itself as an "international organization," and Wellcome Trust are the two nonprofit winners this year. Nonprofits are the fifth most-winning industry since the start of this contest, with 12 winners total.

The healthcare industry also had two winners this year: Angelini and Dynacare. With its diversified offerings, Angelini also counts under the manufacturing industry.

Finally, we have one winner from professional services, Korn Ferry; and one from retail, Loblaw.

This year, we had no winners from the technology industry, which is the contest's third most-winning industry with 26 total winners (16%). The absence of a technology winner coupled with the split of winners across seven industries could indicate that a broader range of industries are now taking intranet design and user experience (UX) seriously. Clearly, word has spread far beyond the two earliest leading industries in great intranet design— technology and finance organizations.

Industries Represented
2001-2020*

* Chart excludes winners of 2004 goverment-focused Design Annual.
Fewer than 5 organizations have been counted in more than one industry.

*Industries winners represent: 2001–2020.* *The total number of winners from each industry is as follows: utility/natural resources, 33; financial, 28; technology, 26; professional services, 16; nonprofit, 12; retail, 11; government, 10 (the chart excludes the 10 winners from our 2004 contest, which included only government agencies); engineering/construction, 9; transportation/ tourism, 9; healthcare, 9; manufacturing, 8; insurance, 7; food and beverage, 3; marketing, 3; automotive, 2; biotechnology, 2; education, 2; consumer packaged goods, 1; media, 1; and publishing, 1.*

## AGILE TRIGGERS RAPID DEVELOPMENT

From 2001 to the present, the overall average development time for the winning teams was 33 months (2.7 years), but the months to complete across all intranets varied greatly (SD=31 months, or 2.6 years). From 2001 to 2007, winning teams typically required an average of 3.3 years to create their intranets; from 2008 to 2013, the average creation time was 3.6 years. Beginning around 2014, however, the average time dropped to approximately 1.4 years—an average time that has held ever since. A two-tailed, independent-sample t-test showed the difference in means between 2008 and 2013, and 2014 and 2020 to be significant (p<.001).
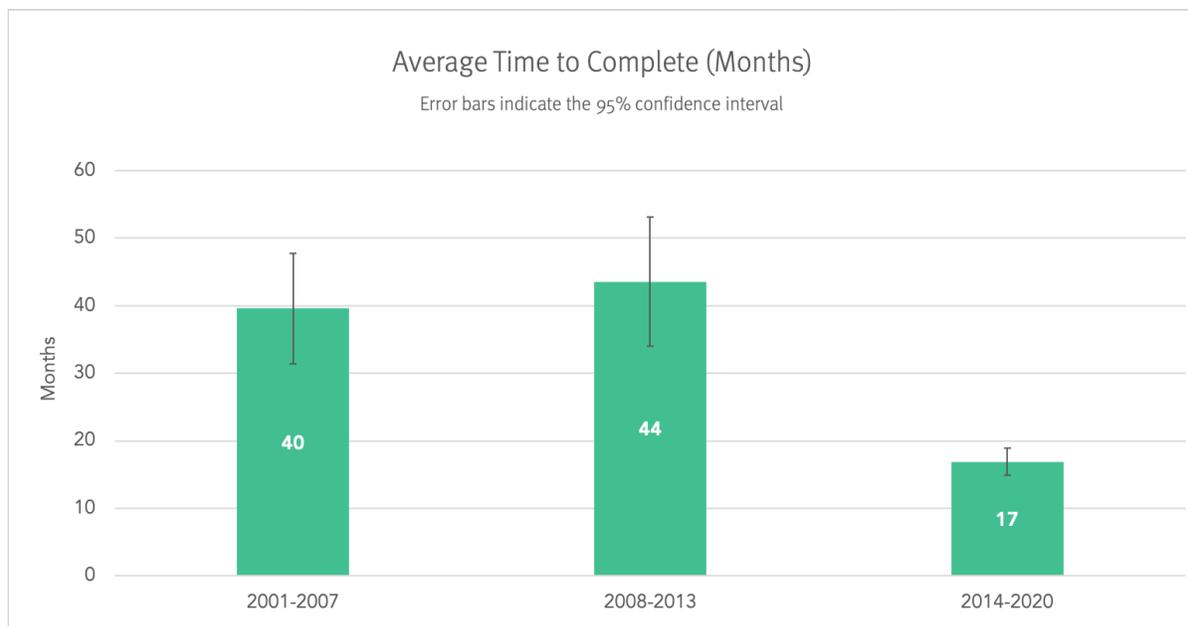
*Average Months Spent Creating Intranets 2001–2020:* *The overall average development time from 2001 to the present was 2.7 years. From 2001 to 2007, the average was 3.3 years (39.6 months); from 2008 to 2013, it was 3.6 years (43.5 months); and from 2014 to the present, it was 1.4 years (16.9 months).*

This year, it took teams anywhere from 8 to 48 months to create their winning designs. The disparity in timing can be attributed to various things, such as: the schedule and deadline that was set, resources, project scope, politics, and command over technology.

In 2015, more teams reported that they were employing some form of Agile development. In 2019 and again this year, all 10 winners reported that they had used an Agile development process. This affects the intranet design in many ways, but the main one is that teams usually continue to create one fairly large design release that is more comprehensive than the lean development's minimum viable product (MVP) concept. This large release is then followed by many smaller iterations with minimal additions and changes. The main release includes many of the more important features and a new visual look, while each later iteration may include a few features at most.

In addition to Agile approaches, team development speed is also enhanced by the use of good intranet applications and tools for design and collaboration.

Finally, larger core teams—that is, more people working on the intranet—make faster work and faster design releases. See the *Larger Core Teams* section of this report for more about team sizes.

## AGILE DEVELOPMENT: ROUSING CHANGE AND CREATING CHALLENGES

The Agile development process has changed intranet teams' mentality and planning in various ways. Among those are the following:

- **Working with agencies:** Working in Agile means that teams plan their partnerships with outside agencies to extend beyond the main release to also include future smaller iterations. In other words, the partnership doesn't end at the big launch, as it often did before iterations became popular. This may mean finding additional budget to retain agencies. It also creates opportunities for a long-term partnership with an agency that can truly learn the company's business. Or, if a partnership was not a good fit, teams can try out new agencies on less intense, smaller releases.

- **Creating and updating the global navigation:** To create a good information architecture (IA), designers usually start with content, then begin naming and organizing. Based on those efforts, they create the global navigation menu. This process can sometimes pose challenges when working in Agile because features must be agreed on before they can be named and placed in the IA and, if appropriate, in the global navigation as well. Many teams working in Agile may have a rough idea of features but, at the initial release (MVP), they don't know what all of the future features will be. This is typically dealt with in one of three ways: 1) Even if all planned commands don't appear in the initial big release, the global navigation is designed (but not coded) before then. 2) The initial navigation design is scalable to accommodate additional commands, though making it scalable for uncertain features is very difficult. 3) The navigation menu architecture is changed whenever an iterative release requires it, which is very disruptive to users.

- **Planning the intranet's launch and related activities:** Marketing activities at launch create buzz and awareness, and educate employees about features and how the new intranet can benefit them. Having multiple iterations means planning a large promotion for the main release, then continuing with smaller promotions for new features as they go live.

## ORGANIZATION SIZE

The company size of this year's winners ranged from 250 employees at Bank Spółdzielczy we Wschowie to 200,000 at Loblaw. Since 2001, there have been 200 winning organizations, and their size has varied greatly, the smallest with 12 employees and the largest with 1,400,000 employees.

## CORE TEAMS

This year's winning teams ranged from as few as five members (at both Dynacare and Korn Ferry) to as many as 80 (at Angelini). These numbers reflect the core intranet teams, which comprised internal and external staff and full- and part-time employees. The numbers do not include extended team members, such as content authors or people working on short-term projects.

The average team size since 2001 is 14 people, although this year, six teams had fewer than that.

More interesting than the total average since 2002 (since we didn't gather enough team-related information in 2001) was the average from 2002 to 2007, which was 8 people. Then, from 2008 to 2013, the average was 16; and from 2014 to 2020, the average was again 16. It's possible that organizations have been devoting more resources to intranet teams in recent years, which we believe is a positive development.
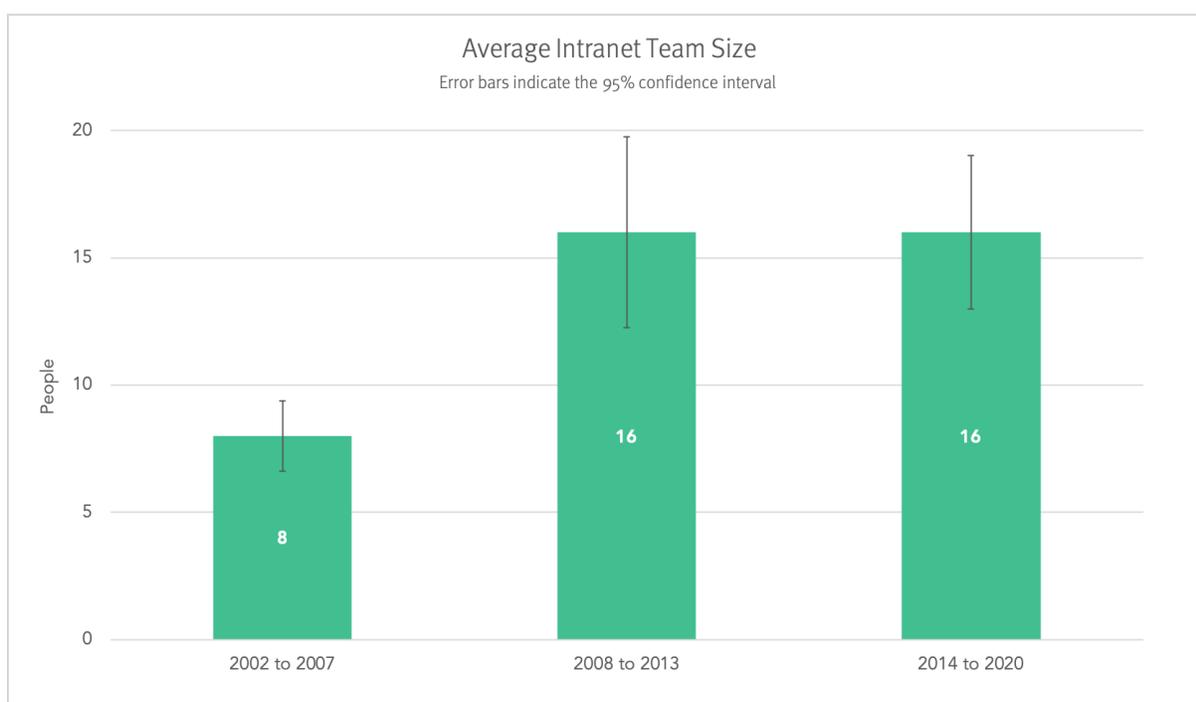


**Average Intranet Team Size: 2002–2020.** *The average winning team size from 2002 to 2020 was 14 members. Broken down, the averages were: 2002–2007, 8.2 members; 2008–2013, 15.6 members; and 2014–2020, 16.3 members.*

Creating and maintaining an intranet—no matter how much you automate and build good workflows—is still a manual job in many ways. And, as always, including individuals from across the organization requires deep research, along with considerable handholding and political maneuvering.

Finally, our team numbers here 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. Given the intranet's importance—both for communicating internally and completing daily work—intranet teams should be more generously staffed for a big release, as well as for subsequent smaller iterations.

## INTRANET TEAM SIZE RELATIVE TO NUMBER OF EMPLOYEES

We also consider team size relative to organization size. Intranet teams are special in that a few people can have a huge impact on many people at the organization. For example, the Loblaw team had nine people supporting 200,000 users.

As an averaged percentage, this year's teams were 0.055% of company size. That is, for every 10,000 employees, 5.5 worked on the intranet team.

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 that 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:

$$\textit{Intranet support ratio = 6.799 * number of employees}^{-0.927}$$

That is, you take the number of employees the intranet supports and raise it to the power of -0.927. You then multiply the resulting number by 6.799 to get the expected intranet support ratio. This ratio, multiplied by the number of employees, results in a team size. (The equation explains 88% of the variability in intranet support ratios.)

As complex at this equation is, in practice, it breaks down simply to team sizes of 9–18 people as follows:

| Number of employees at winning organizations | Size of winning intranet teams |
|---|---|
| 100 | 9.5 |
| 1,000 | 11.3 |
| 10,000 | 13.3 |
| 100,000 | 15.8 |
| 500,000 | 17.7 |

$$y = 6.799x^{-0.927}$$
$$R^2 = 0.8778$$
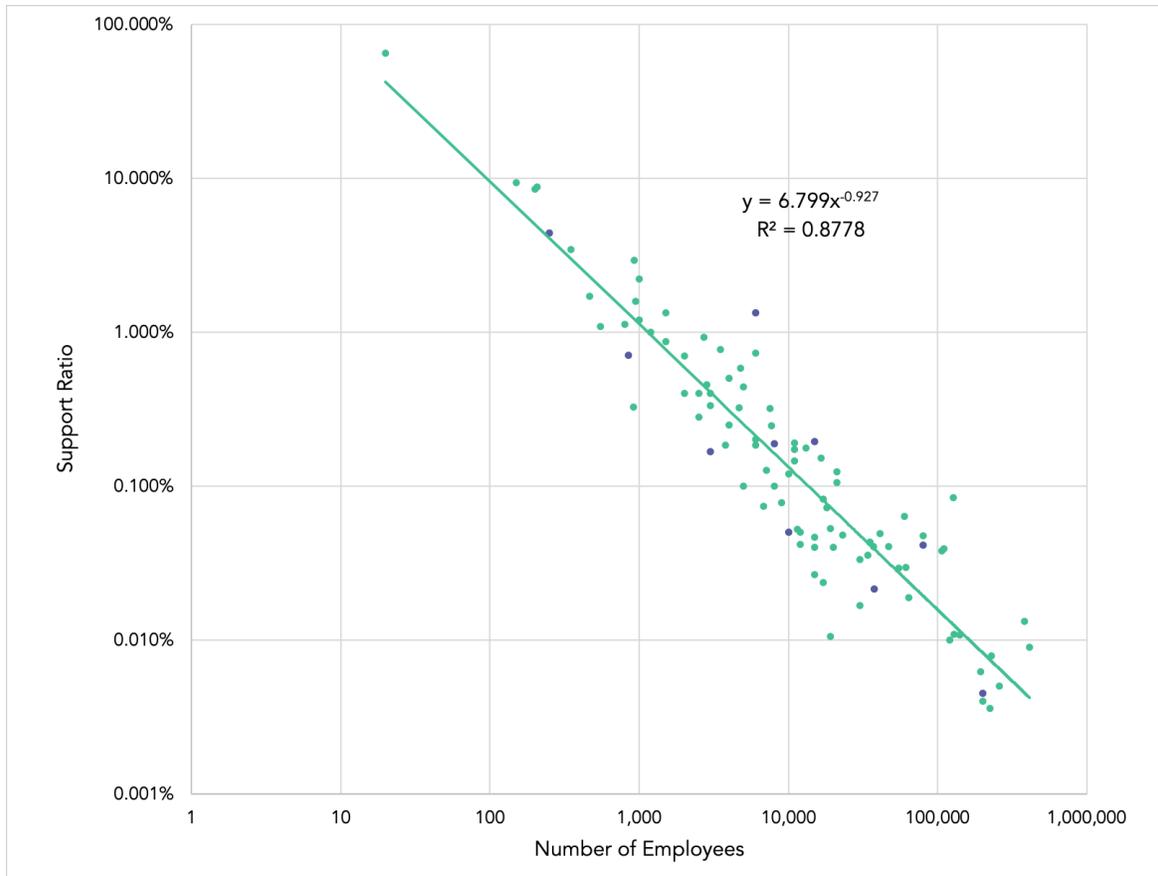
*Intranet Support Ratio: 2010–2020.* *The intranet support ratio equation explains 88% of the variability in intranet support ratios. This effect is visible in the chart, which plots the numbers on a double logarithmic scale. (The red dots represent this year's winners.)*

These numbers are likely on the small side because the teams often enlist agency support. Small teams, with outside support, can get the job done. For example, this year both Dynacare and Korn Ferry had only 6 core team members, while Barclays had 33 and Angelini had the largest team with 80 core members. Most surprising is probably the UN's ability to produce a great intranet supporting more than 37,000 people with a team of only 8 people and no outside help.

| | Core Team | Employees the Intranet Supports | Outside Agencies Employed |
|---|---|---|---|
| Dynacare | 5 | 3,000 | Yes (6) |
| Korn Ferry | 5 | 10,000 | Yes (3) |
| Wellcome Trust | 6 | 850 | None |
| United Nations | 8 | 37,500 | None |
| Loblaw | 9 | 200,000 | Yes (1) |
| Bank Spółdzielczy we Wschowie | 11 | 250 | None |
| Husky Energy | 15 | 8,000 | Yes (2) |
| Consolidated Edison, Inc. | 29 | 15,000 | Yes (2) |
| Barclays | 33 | 80,000 | None |
| Angelini | 80 | 6,000 | Yes (1) |

We do not recommend having very small intranet teams. Teams may need many more (or, in rare cases, fewer) people depending on the circumstances, including the technology's flexibility, power, and ease of use, and the team's familiarity with and command of the technology.

These numbers are simply a suggested minimum team size.

## BRINGING IN OUTSIDE HELP

Intranet teams often create a completely new design in a short amount of time with few people. They also use technologies, employ development processes, and require other expertise that their in-house staff may not have command over. Thus, bringing in help from consultants is often in order.

Six of this year's winning organizations looked to outside agencies and consultants to help with their intranet redesigns, typically bringing in one or two agencies each.

Key areas that teams sought help for included:

- Agile coaching
- Content creation and editor training
- Development
- Discovery
- Ideation
- Information architecture

- Persona creation
- Journey map 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 processes, which raises a crucial question: *When these short-term external resources leave, who is left to iterate, maintain, and continually improve the new site?*

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<br>*IN ALPHABETICAL ORDER* | |
|---|---|
| **Angelini Holding SpA**<br><br>(Healthcare & Consumer Goods;<br>Italy) | This attractive intranet blends utility with playfulness. The intranet team dedicated careful thought and attention to making this intranet a key player in the organization's strategic mission to unify its diverse business sectors and locations. |
| **Bank Spółdzielczy we Wschowie**<br><br>(Financial; Poland) | The intranet team members immersed themselves in researching processes and people to ultimately derive a wide variety of bank-grown applications. The intranet tracks them all and makes them accessible, which helps to create a fulfilling and rich digital workplace. |
| **Barclays**<br><br>(Finance; UK) | Cheers to mindful design decisions—such as underlining links and making accessibility a priority—that promote usability and make all employees' lives easier. Personalized and customizable news and links to tools, along with helpful mobile offerings, all contribute to this intranet's value. |
| **Consolidated Edison, Inc.**<br><br>(Energy & Utilities; US) | Starting with its name and finishing with the details of each feature and piece of content, the Conor intranet methodically and elegantly includes, informs, and unifies employees from two organizations that make up the Consolidated Edison of New York, Inc. workforce. |
| **Dynacare**<br><br>(Healthcare; Canada) | As the center of the Dynacare digital workplace, ConneXe is the destination where employees can start their day and find the tools they need to provide exceptional healthcare for all patients. Available in Canadian French and Canadian English, and built upon four key pillars—accessing knowledge, finding experts, providing a single point of access for all systems, and facilitating improved collaboration and productivity—this intranet helps employees work together to achieve the best results for the people they serve. |
| **Husky Energy**<br><br>(Oil and Gas; Canada) | Hearty site search, helpful scoped searches, and detailed filtering based on precise metadata help HuskyNet users find exactly what they want. These features, combined with access to safety and other mission-critical resources, make this energy company's intranet a truly dynamic force. |
| **Korn Ferry**<br><br>(Consulting/professional services;<br>US) | The Fuse digital workplace represents and supports a transformation in Korn Ferry's business. Fuse connects employees from around the world as they strive to meet the complex needs of their clients. The platform helps them share client information while weaving together collaboration, consistency, tools, and culture. |

| | |
|---|---|
| **Loblaw Companies Limited**<br><br>(Retail; Canada) | Marrying UX and CX, flip offers a case study on creating a successful customer experience by supporting back-end processes. Customer-facing employees and office workers alike harmoniously provide quality products and services, bolstered by the intranet's highly personalized design. |
| **United Nations**<br><br>(Nonprofit Organization; New York USA) | The United Nations' intranet supports the organization's mission-critical work by mobilizing and unifying its international staff. Under the banner of "One UN," iSeek enables productivity and collaboration while fostering a sense of connectedness and belonging among civil servants. iSeek skillfully maintains its status as a source of authoritative content via well-defined standards for content creation, maintenance, and inspiration. A flexible-yet-consistent look and feel lends itself to disseminating global content in English and French, while also enabling localization for its field missions and eight duty stations around the world. |
| **Wellcome Trust**<br><br>(Nonprofit; U.K.) | This custom-built intranet is notable for its focused delivery of features that meet user needs and organizational goals. The simplicity and elegance of its visual design, balanced with a strong site search and pared-down navigation, make this intranet engaging and easy to use. |

| COMPANIES AT A GLANCE | | | | |
|---|---|---|---|---|
| Company | Headquarters | Industry | # of Employees | Intranet Team Size |
| Angelini | Italy | Industrial group (in the health and well-being area of the pharmaceutical and mass-market sectors) | 6,000 | 80 (65 internal/ 15 external) |
| Bank Spółdzielczy we Wschowie | Poland | Banking | 250 | 11 (internal) |
| Barclays | UK | Banking | 80,000 | 33 (internal)[1] |
| Consolidated Edison, Inc. | US | Energy & Utilities | 15,000 | 29 (14 internal/ 15 external) |
| Dynacare | Canada | Healthcare | 3,000 | 5 (internal)[2] |
| Husky Energy | Canada | Oil & Gas | 8,000 | 15 (12 internal/ 3 external) |
| Korn Ferry | US | Professional services (executive search and management consulting) | 10,000+ (8,000 staff and 2,000 contractors) | 5 (internal) |
| Loblaw Companies Limited | Canada | Retail | 200,000 (132,400 colleagues currently online, with plans to roll out to remaining staff in 2020) | 9 (internal) |
| United Nations | US | Nonprofit | 37,505 | 8 (internal) |
| Wellcome Trust | UK | Nonprofit | 850 | 6 (internal) |

[1] Barclays team size and location has fluctuated throughout the app and desktop projects, so 33 is the current number and is representative of the average throughout the project.

[2] Dynacare intranet team size is defined as the core project team that was directly involved in the planning, design, and launch of ConneXe. Other team members supported other aspects of the project but are not included in this number.

| INTRANETS AT A GLANCE | | | | |
|---|---|---|---|---|
| Company | Intranet Platform | Language(s) | Mobile Approach | Agile Development |
| Angelini | SharePoint Online | Greek, Portuguese, Romanian, Spanish, English, Turkish, Italian, Bulgarian, Hungarian, Czech, Slovak, Austrian, Polish, Russian | Mobile first, responsive web design | Yes |
| Bank Spółdzielczy we Wschowie | Custom intranet application based on Linux; application engine uses PHP7 and Symfony Framework; MySQL database used for data storage | Polish | No | Yes |
| Barclays | Custom built (internally) | English | Mobile app + responsive web design for desktop | Yes |
| Consolidated Edison, Inc. | SharePoint 2016 and Office 365 | English | Responsive web design | Yes |
| Dynacare | Unily, Digital Experience Cloud | English and French | Responsive web design and native mobile app | Yes |
| Husky Energy | SharePoint Online, Bonziai | English | Responsive web design from the Bonzai platform | Yes |
| Korn Ferry | SharePoint Online | English | Responsive web design | Yes |
| Loblaw Companies Limited | SharePoint Online | English, French | Responsive web design | Yes |
| United Nations | Drupal 7 | English and French | Responsive web design | Yes |
| Wellcome Trust | Drupal | English | Responsive web design | Yes |

# Common Themes Among the Winners

## UNIFYING THE ORGANIZATION IS A KEY INTRANET GOAL

"If everyone is moving forward together, then success takes care of itself."
— Henry Ford

The greatest theme this year was the desire to build a platform that included all teams, individuals, and tools. The winning intranet teams and the organizations they support clearly realize the value of inclusiveness, collaboration, and consolidation.

Whether the organization comprises a few small teams or several large businesses, an intranet—more than any other digital tool—can bond teams and companies within the organization. When employees see every group's information and apps in the same menu, search results, and homepage, it can have important, positive effects. Likewise, having access to the same overarching news, leaders' messages, rich employee profile documents, and policies can be unifying.

The organization's leaders, by supporting and funding the intranet, demonstrate to all employees that they believe the organization's many people and parts are ultimately meant to operate as a cohesive unit.

Each of this year's winners stated the goals they set for their design before they started the project. Some had several far-reaching goals, and almost every winner had goals related to community and access or knowledge unification. Aspects of the goals related to these themes are listed below.

- **Angelini:** Develop a unique and inclusive group identity, overcome organizational divisions, and integrate the faraway countries; increase sharing and collaboration on projects and cross-functional processes; stimulate innovation and digital culture in employees.
- **Barclays:** Organize hundreds of tools and division-specific microsites in one place.
- **Con Edison:** Unify Con Edison and Orange & Rockland (O&R) employees on a single intranet platform.
- **Dynacare:** Improve collaboration and productivity; provide employees with the ability to search for and find colleagues with expertise in different areas; provide a single point of access for all systems.
- **Husky Energy:** Enable two-way communication with employees to create a more informed and collaborative workplace culture; provide a reliable, single source of information for employees that is mobile accessible; provide a consistent experience for all end users when accessing corporate or regional information and services.
- **Korn Ferry:** Bring together staff and teams under one digital roof; provide one platform to effectively communicate, collaborate, and manage knowledge across the entire

organization; and ensure consistency in knowledge sharing by connecting the right people with the right knowledge at the right time.

- **Loblaw:** Build a sense of community among all colleagues, regardless of location or role; expand the intranet's reach beyond existing users to include more than 140,000 frontline colleagues.

- **United Nations:** "Uniting the United Nations" by bringing diverse people together.

- **Wellcome Trust:** Give users a sense of community and a clear picture of Wellcome, how it fits together, and how it achieves its vision; help users connect to colleagues and feel valued, appreciated, and heard.

## VISION-DRIVEN PROJECTS

To make a great intranet, the development team members had to work together as a strong unit. The vision and goals they set were instrumental in their ability to do this effectively and efficiently.

### Vision: Derive, Agree, Socialize, Remind, and Strive

Whether the intranet's vision and goals are related to unifying an organization's individuals and teams or related to totally different areas, having written intranet goals is like having the net in a hockey game: Everyone on the team knows what they are shooting for and works together to get there.

To derive a vision and goals, teams generally engage in a four-step process:

1. Meet with key stakeholders to generate a vision and achievable goals
2. State and socialize the vision and goals
3. Share the vision and goals with the entire team
4. Remind the team about the vision and goals at key points in the development process

Without goals, team members prioritize their individual work based on what they think the goals are—which may be completely different from what the stakeholders or other team members believe. Even experienced, well-intended developers and content creators may go off the rails at times if they lack clear goals. The result is an intranet design that's not cohesive and is likely to have many other issues as well.

Also, developing intranets poses special challenges, especially because team members often work only part-time on the project. So, when they return to working on the intranet after time away on other projects, they should be reminded of what they are striving for. Goals are extremely important in these cases.

Winning intranet team leaders create, socialize, and remind teams of the goals frequently.

## Vision Can Be About Anything, But Must Be Manageable

An intranet's vision should cover what the team wants to do, but should not be overly ambitious or complicated. Winning teams kept their vision clear and concise. Although the stated goals made it easier for teams to do their work, actually achieving those goals was sometimes a Herculean effort.

The number and content of each team's goals varied to suit the organization's needs. Following are some of the areas the goals covered:

- **Features:** Multiple organizations listed actual features as part of their intranet design goals. For example, Con Edison's goals included: enhanced search capabilities, a standardized look and feel, consistent department templates, and redesigned employee communications, digital forms, policies, and procedures. Likewise, Husky Energy called for "robust search function that delivered current and accurate data." In its goals, the Barclays team listed personalization and customization.

- **Efficiencies:** The Bank Spółdzielczy we Wschowie team wanted to "streamline business processes" on the intranet, and Angelini wanted to "increase sharing and collaboration on projects and cross-functional processes" and stimulate "innovation and digital culture" among employees. Dynacare worked to facilitate "improved collaboration and productivity," while Korn Ferry looked to "increase efficiencies across key processes and the dissemination of knowledge across the business."

- **Systems and devices:** Some organizations included mobile devices and legacy systems they wanted to support with the design. For example, Barclays' list included making the "desktop and mobile applications work with selected legacy, current, and new technology, including: iOS, Android, Chrome, and IE." Loblaw wanted its site to be designed in a "mobile-friendly manner," while Husky Energy called for a "mobile accessible" site.

- **Communication:** Dynacare wanted to enable "employees to communicate and collaborate more easily with colleagues." Husky Energy strove for "two-way communication with employees to create a more informed and collaborative workplace culture."

- **Content:** Korn Ferry's goals mentioned creating a "clear classifications and ownership of content," while Loblaw's included "providing relevant content to colleagues." Husky Energy wanted to "enable administrators and end-users to publish and manage information efficiently."

- **Accessibility:** Barclays and Husky Energy both set goals related to accessibility.

## CHALLENGES

The teams in this report make designing a great intranet look easy. But when probed, they described a few of the challenges they faced and overcame as they forged ahead on their inspiring designs. The themes they mention are not uncommon in intranet design projects.

### Technology

**Barclays:** Since Barclays is a bank, the technology has tight security restrictions, and the team often did not have a choice of which technologies and tools to use.

**Husky Energy:** The project was an early adopter of the Office 365/SPO SaaS platform, and enterprise support services for SharePoint—which required additional effort to plan and implement—were not defined with the organization's service provider. The new HuskyNet is Husky's first onboarding to Office 365/SharePoint Online. And it's a SaaS project. So, during the project, there were many new discoveries, but no processes available to support them.

### Applications, Tools, Subsites, and the Public-Facing Website

**Barclays:** The hundreds of tools and division-specific microsites, all heavily used by colleagues, posed special challenges.

**Dynacare and Korn Ferry:** The teams challenged themselves to leverage their investment in Office 365.

**Angelini:** The main challenge was to identify unique and coherent storytelling opportunities and establish a visual consistency between the internal workplace and external websites.

### Business and Leadership

**Bank Spółdzielczy we Wschow:** As is true at many organizations, the intranet team had to work to establish and maintain effective communication with the business.

**Korn Ferry:** A fully defined corporate strategy was not yet distilled at project inception.

### Intranet Team

**Bank Spółdzielczy we Wschow:** A very small team undertook the challenge of creating a custom platform completely from scratch.

**Barclays:** The design team was located across London, Radbroke, and India, which made communication and timing tricky.

**Korn Ferry:** The team had to continue being effective even when key team members left both Korn Ferry and ClearPeople (its external digital consultancy) at a critical phase of the project.

## Varied Employee Roles and Locations

**Dynacare:** It was complicated to provide a single seamless experience for organizations that employ both union and non-union employees.

**Korn Ferry:** The team had to create a seamless digital experience by conjoining disparate systems for a workforce that was geographically distant—and in some instances, geographically isolated.

**Loblaw:** Targeting content by division, banner, job roles, and (sometimes) to specific stores posed complex problems.

**United Nations:** Deficient or absent internet access at various locations created unique barriers.

## Multilanguage

**Dynacare:** Providing a true multilingual UX for both its English- and French-speaking employee community was a challenge when the team realized that not all of the widgets were multilingual capable.

## USER-DRIVEN DESIGN

This year's winners made great efforts to put users at the center of the intranet design process. For example, *design thinking* was a prevalent theme with both Angelini and Dynacare. Husky Energy employed card sorting and tree testing to create an understandable IA. Con Edison and Dynacare created and used personas from design through rollout. The Wellcome Trust team focused on top tasks and three core user statements:

- *"I have a clear picture of Wellcome, how it fits together, and how we are achieving our vision."*
- *"I am connected to my colleagues, feel valued, appreciated, and heard."*
- *"I have what I need to be impactful in my role."*

## OUTWARD THINKING INSIDE THE ORGANIZATION

Employees are often so focused on their own work and team that they are woefully unaware of what other groups at the organization do. Without knowledge about the rest of the organization, however, groups can be too provincial, miss opportunities to collaborate, hire external consultants when that expertise already exists in-house, and may even miss out on new career paths.

This year's winning intranet design teams understand that providing information about the various business units and teams is valuable. For example, the Husky Energy intranet offers sections about the organization's teams so employees can learn about each team's strategy, leadership, news, and performance. Dynacare's *Who Does What* page helps employees understand the business structure and offers details about what cross-functional departments do.

## CENTER OF THE DIGITAL WORKPLACE

Like last year, this year's winning teams are taking responsibility for inventorying the many tools that make up the organization's digital workplace and making it possible for users to find and access them on the intranet.

Most of the winning designs included a tools menu, launching point, or other means to access various applications. Bank Spółdzielczy we Wschowie supports countless applications, from banking to HR. Barclays' section for tools and links acts as a gateway for various tools and third-party sites. Angelini's intranet integrates with both ticketing and workflow systems for vacation and order requests. On the Dynacare intranet, each application or digital workplace tool is contained in a card with a corresponding icon. Loblaw's uses toolbar icons that let employees access tools targeted specifically to them.

## ENABLING CONNECTIONS

Building personal connections at work can result in happier employees, each with a network of colleagues to lean on when needed. Winning designs employed various features to promote these connections. For example, Loblaw displays a Yammer feed to cultivate relationships between coworkers, while Barclays offers three types of collaboration tools on its intranet. Angelini put care into sharing the organization's pride in what its people do. To promote success stories of the 100-year-old company, an "Angelini 100" page called for employees from around the world to share their celebration stories. Husky Energy's intranet features a people and community section that showcases work anniversaries and awards.

## CONTENT MANAGEMENT ADVANCEMENTS

Understanding that content is the most critical part of any intranet, designers went beyond the typical and tried different strategies to audit, create, maintain, and govern their intranet's content.

When designing its intranet's IA, Angelini conducted a comprehensive content inventory that encapsulated not just assets contained on the old intranet, but also other corporate tools whose content could be integrated into the new digital workplace.

Dynacare's special edit menu, available only to content administrators, lets them quickly and easily do simple edits directly on any intranet page rather than having to go through the CMS.

Husky Energy offers a link in the footer of every page to contact the news editor, and another link to encourage employees to provide input on articles, pages, or the overall site.

Wellcome Trust encourages and expects employees to share, which resulted in 40% of employees posting articles in 2018.

Content assessment, user research, a governance model for department content managers and authors, and weekly planning and training meetings were just a few of the things Con Edison did to ensure the creation and maintenance of successful content on its new intranet.

Giving authors credit for content and making their contact information available helps keep content fresh. Husky Energy's intranet displays the name and photo of the person who posted the page, which not only gives authors credit and a sense of page ownership, but also helps colleagues determine who to contact if they have a question or comment.

## LAUNCH ACTIVITIES: ADVERTISING AND PROMOTING THE NEW INTRANET

Winning intranet teams have become quite creative in marketing their new intranet designs. They understand that it is essential to communicate both that the old intranet is no more and that they have created a better tool in its stead.

At Angelini, the internal communication department supported the launch with activities, including a video teaser, newsletters, a workbook, and flip boards located in all company locations. These efforts clearly worked: 80% of Angelini employees, from all over the world, visited the MyA intranet on launch day.

Barclays also employed various activities, such as teaser videos, articles, a dynamic homepage banner with a link to a detailed video, and posters in elevators and lobbies. Members of the intranet team also showed employees the new homepage, provided information about the redesign, and gathered feedback.

Con Edison invited employees to submit and vote on naming suggestions for the new intranet's name. The winning entries received a token gift card, and company leaders chose the new name from the most popular suggestions. Then, to ensure a smooth launch, Con Edison's design partner, West Monroe, developed a change management strategy that included detailed communication and training plans for content authors, Corporate Affairs, and general employee users.

Korn Ferry offered stickers, created videos, sent emails, and offered a site tour with content bubbles that advertised its features.

Husky Energy provided a photo booth to encourage employees to populate their profiles. This created a lot of excitement in anticipation of the new intranet, and more than 2,500 employee photos were uploaded prior to launch.

Dynacare created a team of "ConneXe Ambassadors" to encourage user adoption. These ambassadors created various learning opportunities to help train users, and also described what had changed and what had stayed the same on the new intranet. Teaser videos, released one at a time in the weeks leading up to the launch, featured individual Dynacare employees and focused on one of the intranet's four core pillars. Done in a fun and informal way, these videos were very successful in creating buzz.

# Feature Trends

Mother Necessity whispered in the ears of this year's winners, inspiring them to fashion features that meet user needs. Design experience and good instincts also directed winners as to when they should skip the innovation in favor of aptly applying a good old stand-by feature when doing so was the most effective option.

Some teams in this report had similar goals and needs, and thus offer similar features as follows.

## FAVORITES FOR PAGES AND TOOLS

Today's digital workplace often comprises a glut of tools, subsites, and web pages. While this offers more potential ways to be productive and informed, it also means more choices, more navigation options, and potentially less-effective search results. One way this year's teams ensure that employees have the content they need at their fingertips is to let them create bookmarks.

Bank Spółdzielczy we Wschowie and Con Edison are among the intranets that included bookmarking capabilities. Beyond favoriting pages, the Barclays' intranet allows users to favorite applications, which then appear on their homepage. Wellcome Trust's main navigation offers an editable shortcut area. Korn Ferry allows users to favorite collaboration workspaces across Office 365 Groups. Dynacare's customizable menu for applications and tools ensures that critical business tools are no more than a click away.

## CUSTOMIZATION AND PERSONALIZATION

For years, personalization (pushing content and features to employees based on their roles) and customization (allowing users to make specific content and features easily accessible) have been popular for intranets, especially those with a lot of content, multiple locations, and a varied user base. Doing complex login work and knowing the user's team, location, and role makes robust personalization possible and effective. But even something as simple as allowing users to favorite a topic is another operative way to direct employees to information they want.

This year, several winners personalized content for users and provided customization options. For example, Barclays personalizes the homepage and news based on the logged-in user's role and location, and lets employees choose news topics that interest them. Loblaw also personalizes based on the user's role. Angelini lets users customize their application toolbar. The Con Edison homepage presents information based on employees' selected preferences. Wellcome Trust offers both a news feed for all news, and a feed for news only from groups that the user follows. Husky Energy allows customization of news, events, and more. The UN's toolkit provides access to popular items personalized for each duty station, and Korn Ferry consolidates links based on the logged-in user's background.

## GOOD NAMES

William Shakespeare said, "A rose by any other name would smell as sweet." An intranet, however, is no fragile flower, and its name can help convey the site's reason for being and tone of voice. An intranet's name can help an organization communicate its capabilities and help employees understand what the intranet represents. The reasoning behind the name of each winning intranet is different, but each has some meaning or benefit.

### Personified (Human Name)

Giving the intranet a human name personifies the application, which can make it seem more approachable and make it easy to remember.

- *MyA* (Angelini Holding SpA) encapsulates the personal, customizable launchpad for many tools at Angelini (and it's easier to say than "MyAngelini").
- *Conor* (Consolidated Edison, Inc.) is a portmanteau of "Con Edison" (Con) and "Orange & Rockland" (Or), the two regulated utilities that the intranet was built to bring together.
- *flip* is Loblaw's fun—and lowercased—intranet name.

### Unassuming

A simple description is always an ace-in-the hole for an intranet name. A name with the words "intranet," "portal," or the company name plus "net" usually works well:

- Intranet (Bank Spółdzielczy)
- Barclays Now (Barclays)
- HuskyNet (Husky Energy)
- Trustnet (Welcome Trust)

### Representative

Some teams choose a metaphor or use wordplay for the intranet's name, which can be playful and informative:

- ConneXe (Dynacare)
- Fuse (Korn Ferry)
- iSeek (UN)

## SEARCHING MORE THAN INTRANET PAGES

Search has become a far-reaching function and a look-up for items well beyond just the intranet pages. This makes the intranet search feature a more valuable tool. For example, Husky Energy's

HuskyNet search includes results from the digital workplace beyond the intranet's walls. Bank Spółdzielczy we Wschowie enables searching within a document—without opening it. Dynacare's intranet, integrated with the organization's SharePoint Online environment, allows users to search for content on the intranet and SharePoint from a single search box. Barclays' search results are split into buckets for Barclays Now site content, the employee directory, HR, and news.

## SCOPED SEARCH WITHIN A SECTION

For some individual intranet sections, it can be appropriate to have a special search that is more streamlined and accurate than the full site search. As long as it's very clear that the search is scoped, and employees don't confuse the scoped search with the main site search, scoped search features can be effective. The search field's position and label can help clearly distinguish a scoped search from the main site search, and indicate when the search focuses only on content within a particular area.

On Husky Energy's intranet, some sections—such as those for policies and locations—offer their own search. The UN makes it possible to search only classifieds, events, or jobs.

## VISUAL SECTIONS OR TILES

Visually indicating that a chunk of information belongs together makes it possible for employees to scan content effectively. These chunks can be represented in various ways, including by using spacing, background area, subheads, and type. This year's winners took different approaches.

| Used mostly tiles | Used a mixture of spacing, section subheads, and tiles |
|---|---|
| Anglelini | Bank Spółdzielczy we Wschowie |
| Dynacare | Barclays |
| | Con Edison |
| | Husky Energy |
| | Korn Ferry |
| | Loblaw |
| | United Nations |
| | Wellcome Trust |

## RIGHT RAIL FOR CONTENT DISCOVERY

Great intranet designers go beyond making it possible for users to find what they are looking for and actually help employees to discover new features that can make their work more productive and enjoyable.

This year's crop of winning designs used the intranet's right rail to put content in front of employees in an orderly way without adding clutter to pages.

The Korn Ferry homepage's right rail helps people discover and remember new or helpful content related to their work. Con Edison's right rail houses events. Husky Energy provides tags in the right rail that users can click to discover additional information related to the page's content.

## LOGO

A logo on an intranet is like an anchor. It helps employees acclimate, and it links to the intranet's homepage. Some intranets—like that of Husky Energy and the UN—have their own logo, helping to create an identity for the site. Loblaw shows the intranet's main logo and, to its right, a different logo for the selected division.

## SKINNY FOOTER

Fat footers were very popular on intranets in recent years. But this year, only three winners—Dynacare, Husky Energy, and the UN—offered them. Most of the other intranets—Angelini, Barclays, Consolidated Edison, Korn Ferry, and Loblaw—offered a small footer, while Bank Spółdzielczy we Wschowie had just its name and copyright in the footer, and Wellcome Trust had no footer at all.

## RESPONSIVE SITE

Mobile access offers flexibility, and it is a welcome option for many intranet users. An important part of Wellcome Trust's mission is to support flexible work, so its team designed the site for five breakpoints: mobile, tablet-portrait, tablet-landscape, small laptop, and large monitor.

For some employees, mobile is the best option for intranet access. Korn Ferry, Husky Energy, the UN, and Loblaw all ensure that employees can access their intranets on mobile devices.

Responsive design is not just for mobile. It also makes for a better experience overall, allowing users to work in whichever ways they prefer. For example, Barclays' user research showed that users work with multiple windows open at once on desktop, and its responsive site makes the content flow in a usable way no matter the window size.

About one-third of Con Edison's workforce is in remote locations or on the road providing service. These employees are equipped with a Toughbook that has a smaller viewport than most desktops or modern laptops. To accommodate these employees, Conor is responsive and gives employees quick access to the documents and information they need to do their jobs effectively.

## STATUS BUBBLES

Giving employees more information was a tenet of many winning design teams. One simple feature that helped teams achieve this goal was to offer *bubbles*—basically, colored circles—some of which contained a number to indicate the amount of new content. For example, Loblaw displays the number of new items in a circle in each tab, which alerts users of new announcements before they click a tab. Bank Spółdzielczy we Wschowie offers numbered dots on headings and subheadings to let users know when there is new content to be sniffed out. Barclays displays status bubbles on the homepage in the news and task areas. Wellcome features comment bubbles on the homepage, events, and news pages to show where discussions are happening. The UN has like indicators and status bubbles on the homepage and news features to denote the number of comments on the content. In Dynacare's notifications hub, users can access their personal notifications about new content, social activity, and company announcements, as well as manage their push notifications for mobile devices.

# Best Practices for the Intranet Design Process

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

Since the year 2000, we have examined intranet design patterns across case studies of award-winning intranets, as well as in our intranet research for our clients and other NN/g reports. Through this process, we have identified specific steps 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 can truly help your organization and its employees.

# BASIC STEPS TO ACHIEVE GREAT INTRANET DESIGN

Successful teams take several common steps to create stellar designs:

1.  Get management buy-in

2.  Quickly pinpoint stakeholder champions across the organization and keep them involved

3.  Launch the discovery process to learn about employees and their needs

4.  Review the current intranet's analytics and support logs

5.  Inventory and audit content, 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, share, and use personas

10. Develop a content strategy

11. Brainstorm design ideas

12. Continually collaborate with stakeholders via interviews and workshops

13. Review design iterations with target users and conduct ongoing usability testing

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. Plan and communicate a governance strategy

19. Support, train, and establish ongoing enrichment and rewards for content managers and authors

20. Establish a sustainable governance model

21. Promote and advertise the intranet before, during, and after launch (or launches, in an Agile world)

22. Set up analytics before launch

23. Monitor, track, and assess how content and features are doing

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 highlights your 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 is to ensure a cohesive look and feel throughout the intranet, without disrupting what people already know.

## LEARN FROM SOCIAL FEATURES AND FEEDBACK LINKS

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

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

Additionally, offering feedback links allows users with ideas or issues to easily contact the intranet team and content owners.

## PLAN MOBILE DESIGN FROM THE START

Not every team needs to adopt the "mobile first" mentality, but it would behoove every team to think about mobile early on and to truly plan the mobile UX. Although some technologies almost automatically create mobile versions of desktop intranets, you should not assume that their defaults are usable; it is important to both plan your mobile design and usability test it.

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 targeting the design 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 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.

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

## 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 across from 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? You can 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 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 sketches. 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 their 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 NEW INTRANET LAUNCH

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. It's also crucial to advertise the redesign and the new features. Following are some tips to involve your organization in creating a good intranet design process and a successful launch:

- 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 new 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 workspaces—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 TECHNOLOGY AND THE CLOUD

Some intranet teams are stuck with technology solutions; others have the freedom to shop around for the best project tools. 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 their organization's needs. Just because a tool lets you provide a feature, doesn't mean it's a good solution for your employees.

Over the years, winning intranet designs have typically come from organizations that took a technology solution and made it fit their needs by extending or customizing it rather than 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 customize tools themselves, while others rely on outside experts to help with technology issues. Also, some companies customize from the get-go, while others stick to what's offered initially and customize later. In either case, knowing the technology and any challenges up front can help minimize unexpected glitches down the road.

Another key issue to consider is intranet cloud solutions and the pros and cons they bring. Security can be an advantage on the cloud, as can storing data there, which eliminates the need for servers and local hard drives. System auto updates are another benefit, but they can also be a problem as they can completely break intranet customizations. Typically, when using the cloud, you must choose between auto update and customization; you rarely get both.

Finally, before you commit to any tool, you should make sure that your design fits its requirements. 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.

## PERSONALIZE AFTER YOU CREATE THE INFRASTRUCTURE

Personalizing the intranet can help people more easily find what they need and expedite their work. Hiding things that 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 themselves. 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 (ROI), 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 at 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?

## PLAN GOVERNANCE: TO MAINTAIN AND ENHANCE

We've seen too many companies complete their redesign projects and then leave the site to run itself, only to find that the intranet is a big mess again a year or two later. For sites to be successful, they must be maintained and managed. Although a team dedicated to the 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:

- Governance team meetings
- Assigned (and accepted) roles
- Budgeted resources
- Support, including tools and training, 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.

# Case Studies of the 2020 Winners

# Angelini Holding SpA

## OVERVIEW

### COMPANY

Angelini was founded in Italy in 1919 and is an international leader in the health and well-being area of the pharmaceutical and mass-market sectors.

**Headquarters:** Rome, Italy

**Company locations:** Angelini operates in 17 countries.

**Locations where people use the intranet:** Employees who use MyA are located in Italy, Spain, Portugal, Czech Republic, Slovakia, Russia, Romania, Bulgaria, Austria, Greek, Turkey, Hungary, and Poland.

**Annual revenue:** Approximately €1,600 million in 2018

### THE INTRANET

**Users:** 3,800 Angelini employees in 13 locations around the world now use MyA. The organization has developed a roadmap to extend the new intranet to all company divisions in the coming years. When that goal is met, MyA will be available to 6,000 employees in 17 countries.

The MyA digital workplace project is part of a wider transformation program that includes the design of the Angelini intranet, the Angelini Group corporate website, and the Angelini Academy website. The objective of this comprehensive program is to redefine the way in which the company communicates internally and externally through a compelling and integrated storytelling approach and an enhanced digital experience.

The new Angelini intranet supports Angelini employees as they communicate, collaborate, and improve individual productivity in their work through the Microsoft Office 365 suite.

**Mobile approach:** Mobile first, responsive web design

**Technology platform:** SharePoint Online

### ANGELINI TEAM

The internal team includes members from the Corporate Internal Communication Team, IT Support, and the European Editorial Network.

### AVANADE TEAM

A team of approximately 15 people guided the design research and UI design including IA, graphic design, and front-end development. A technical team of 8 developers did the back-end development and architecture.

**Experience design lead:** Silvia Soccol

**UX research and interaction design:** Angelo Oldani, Martina Ondei, Alice Deias

**Creative direction and visual design:** Danilo Rolle, Francesca Maio, Elisa Grasso

**Front-end development:** Marcello Palmitessa, Giulia Contento, Carlo Tagnesi, Alfred Arcifa, Krzysztof Cieslik, Mateusz Gula

**Tech lead, sharepoint development and testing:** Massimiliano Cianchettini, Leonardo Mercatelli, Matteo Ardu, Francesca Leone, Francesco Meloni, Alessio Pau, Daniele Proietti, Antonella Vignola

**Project management:** Paolo Matrella, Celeste Cirasole

## HIGHLIGHTS ABOUT THIS WINNER

MyA, the intranet for Angelini Holding SpA, supports employees across 13 countries and is available in 14 languages. The team members behind this intranet worked diligently to truly understand both the business goals and the vast needs of employees. With this information, they commenced a large redesign project to create an intranet with purposeful features and an inviting design that acts as a solid and convenient portal to other important tools at Angelini.

- **Functional homepage:** MyA's homepage is its unique selling point. Although a lot is presented on the page, it is clearly laid out with excellent use of white space, chunking, and section dividers. Everything from news and events to the latest job vacancies and links to recently visited team sites is available, making this homepage both a place where users spend time and a launch-point to work across the Office 365 suite.

- **Visually attractive design that supports the brand:** MyA has a consistent visual design, utilizing a cool color palette, fun card layouts, and a thoughtful use of whitespace. The main body font is clean, while a playful serif font is used for headings. All in all, the visual design makes this intranet a charming one to view. The design communicates the company's values and character not only through the visuals, but also through the copy's tone of voice.

- **Integration with many systems:** MyA is the launch pad for many tools at Angelini. Integrations with ticketing and workflow systems for vacation and order requests are available, and users are notified of actions and updates via MyA's homepage. Employees can also view the day's upcoming meetings via calendar integration. Lastly, users can see employment opportunities across Angelini's diverse portfolio without having to leave the intranet's homepage.

- **A place to tell stories and promote cohesion:** One of the nice features of this intranet is the thought and care that was put into sharing the organization's pride in what it does. In 2019, Angelini celebrated its 100th year as an organization! To promote company success stories and involve all sites, a new page called *Angelini 100* was created. Employees from all over the world were invited to share their celebration stories, news events were created and broadcasted, and a gallery of photographs taken at these events was posted for employees to browse. An additional fun twist was introduced through an online centenary quiz, which added an element of gamification. Employees all over the world can play, and a leaderboard displays the top players' scores.

- **Targeted news:** When companies are large and have many sites, users often find news to be either irrelevant, if all news from multiple sites is published in one place, or isolating, if users see only their own department's news and thus lose a sense of the broader organization. MyA handles this extremely well with a categorization system on the homepage that lets users browse news items by location, department, and the headquarters simply by tabbing between different news streams.

- **Mini ecommerce site:** Angelini's business is not only in pharmaceuticals, but extends to consumer goods, machinery, wine, and perfume. The company offers employee discounts, and the intranet boasts its own mini ecommerce site where employees can purchase bottles of wines or other Angelini products for themselves or as gifts. The team has thought hard about how to ensure that this experience is seamless on mobile devices (which account for 30% of site visits). During the mini ecommerce site's redesign for mobile, the team stressed three design aspects: ensure that product images are prominent, adopt progressive disclosure for product information, and choose a common design pattern by providing a button sticky bar to enable product scrolling without losing actionability.

- **Customization of links:** Above the fold, users find their commonly accessed tools (separated by personal and business) and can easily customize them.

## BACKGROUND

### Creating a Digital Workplace

A rebranding campaign was the catalyst for the organization to rethink its overall digital presence. The campaign gave Angelini an opportunity to review a dated, confusing intranet and simultaneously set the direction for a new institutional website, thus launching the company's digital workplace project. The intranet project was part of this wider effort and aimed to transform the Angelini intranet design, the Angelini Holding website, and the Angelini Academy website with three specific goals in mind: review and redefine the way the company communicates, both internally and externally; provide compelling and integrated storytelling; and ultimately create an enhanced digital experience for all employees.

The new intranet uses the Microsoft Office 365 Suite to support employees by providing them with tools for communication, collaboration, and individual productivity to improve their work lives.

### Goals

The main goals of MyA are as follows:

- Develop a unique and inclusive identity
- Overcome organizational divisions and integrate distant countries
- Increase sharing and collaboration on projects and cross-functional processes
- Guarantee that employees have easy, secure access to content and documents
- Improve the UX
- Stimulate innovation and digital culture within employees

## Defining the Project Vision

Angelini's design partner, Avanade, guided the design team through several design thinking activities that helped define the company's vision for the new intranet. Team members described these goals in terms of pillars, where each pillar sentence begins with, "We want…" This exercise helped them articulate the aspirations and vision that would guide them through all project phases.

These pillars were defined as follows:

- "We want everyone that uses Angelini's intranet to feel welcome, no matter her provenance or her role."
- "We want to offer places where it is easy to keep up to date with information and provide white space to talk about growth."
- "We want people who interact with the intranet to intuitively discover the best route to find information, to avoid any possible noise from an excess of poorly distributed content.
- "We want the intranet to increase people's awareness of Angelini Group identity."
- "We want to foster collaboration as a model of behavior across all content."
- "We want to promote continuous access to accurate and updated information, materials, and documents.
- "We want to enable simple ways to create, network with, and find the contacts users are looking for."
- "We want to create a workplace where help is at hand, where users find answers to questions."

## Challenges

The team's main challenges were to identify a unique and coherent storytelling approach and create visual consistency between the internal platform (the intranet) and external websites; doing so would convey a cohesive brand message that would communicate the organization's mission.

The team used design thinking and Agile methodology as the project's backbone for several reasons. First, it had to achieve tangible results in a short period of time, and Agile cycles were deemed an efficient way to accomplish that goal. The team also chose this mix of approaches because both methodologies helped it stay focused on user needs, matching business goals to people goals all along the way. This helped the team deliver, in just eight months, a functional platform that would be valuable to Angelini employees. An iterative design approach was critical to making all of that happen.

Trying to accomplish the parallel goals of simultaneously creating an intranet and a public website meant that the team had to conduct joint Learn and Define phases for both projects, then split the process into two streams for the Design and Build phases. This helped the team deliver great results for both products, as well as optimize stakeholder involvement in the first

two project phases (user research and concept definition) where stakeholder approval and commitment were critical to putting the projects on a clear path to success.

## A Successful Outcome

MyA is now used by 3,800 Angelini employees in 13 locations around the world. And, thanks to feedback received from the organization's top management, the intranet roadmap has been extended. When the rollout to all company divisions is completed in the coming years, MyA will reach an estimated audience of 6,000 employees in 17 countries.
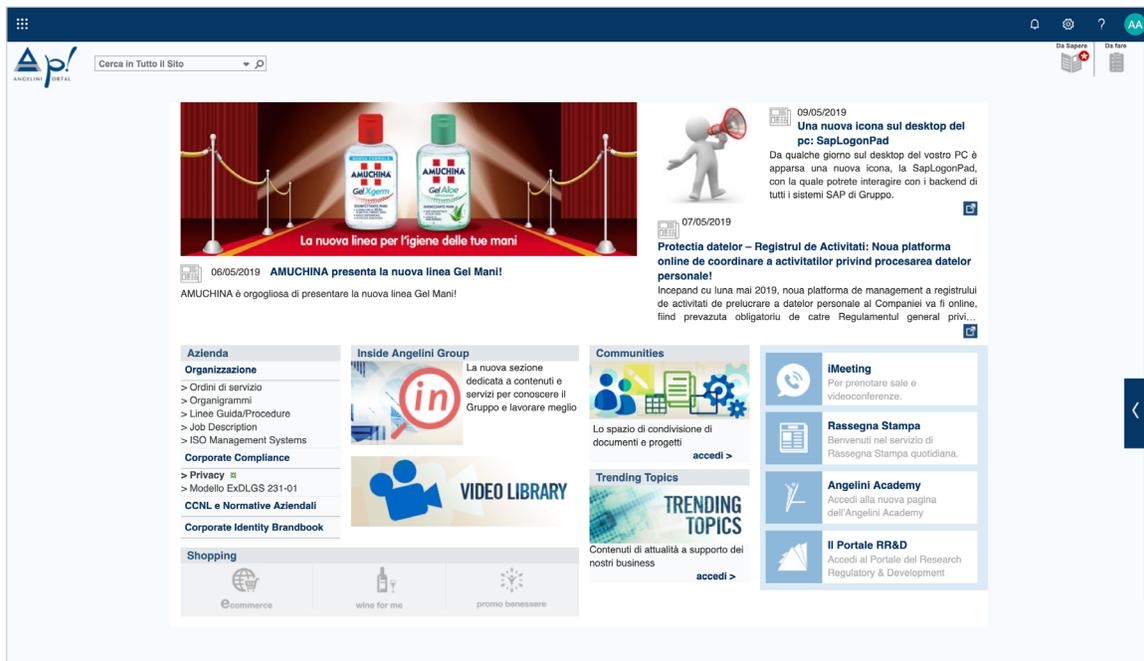


**Image 1. Angelini's Previous Intranet Homepage.** This shows the intranet homepage prior to the most recent redesign. *Angelini_01_Before_Homepage.png*

# DESIGN REVIEW
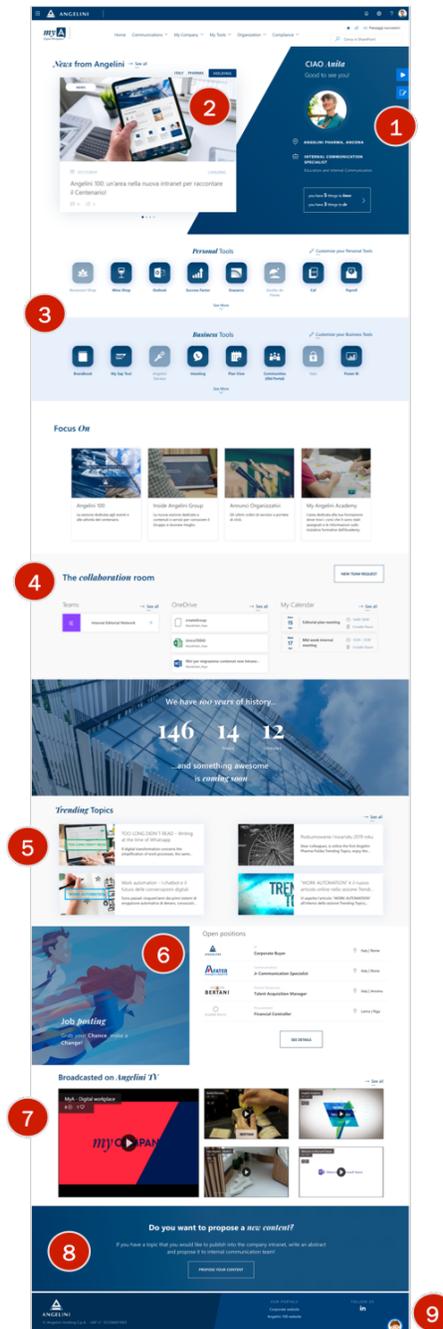
## Homepage



**Image 2. Angelini Intranet Homepage.** MyA's homepage provides relevant information and tools in an organized format.

*Angelini_02_Homepage_desktop.png*

## Homepage Highlights

MyA's homepage is one of this intranet's greatest features as it is both functional and beautiful. This homepage is designed to be a place that employees want to visit when they begin their day, whether to get notified about HR-related tasks, browse the latest advertised roles or important news, launch workplace tools, or pick up work in collaboration spaces.

1. **Notifications:** In addition to being welcomed when they first launch the intranet, employees are notified of any important news announcements. They are also notified of progress on tickets (such as orders or vacation requests) through the site's integration with ticketing systems. These notifications ensure that they see important announcements that all employees should be aware of and that common HR tasks are taken care of quickly and efficiently.

2. **Latest news:** The latest news is presented at the top of the page. Users can tab between three different news streams: department, location, or headquarters office.

3. **Customizable tool links:** MyA hosts tool links prominently on the homepage using icon badges and labels. Tools are presented in two rows—one for personal applications and another for business applications—which makes finding tools straightforward. Users can easily customize the tools that appear in each row; MyA limits the tool links in each row to eight so that the rows don't become unwieldy.

4. **The collaboration room:** MyA is the jumping off point to the rest of the company's digital workplace. Because Angelini uses the full Microsoft Office Suite, employees can easily see upcoming meetings for the day in their calendar and view recently worked on documents or recently visited group sites.

5. **Trending topics:** News articles that are trending—that is, are being widely discussed or read—are posted in this section below the fold.

6. **Job posting:** Integrating with a back-end system allows for job advertisements to be automatically posted on the homepage. This strategic decision not only assists users in thinking about career progression, but also helps Angelini retain talent and encourage job rotation, and ensures that applications for new roles are competitive.

7. **Video media:** The intranet includes corporate video content from Microsoft Stream. This content is personalized based on the user's profile. Editors manage their video channels and decide who can watch the videos.

8. **Proposing new content:** This banner encourages users to contribute content to the intranet. It contains a link to a form, which allows users to select a content type and propose an outline directly to the editorial team in a structured format.

9. **Chatbot:** Although chatbots are not a common feature on intranets, Angelini is unique as it is a global company with offices in many different countries. The chatbot is available in multiple languages and helps users navigate the site and find regularly accessed content.

For example, if employees need information about welfare packages, they can ask the chatbot, which will then provide a link to the correct intranet site. The chatbot is located lower on the page so that it won't distract or interrupt users who are comfortable using the intranet.

## My Angelini Academy
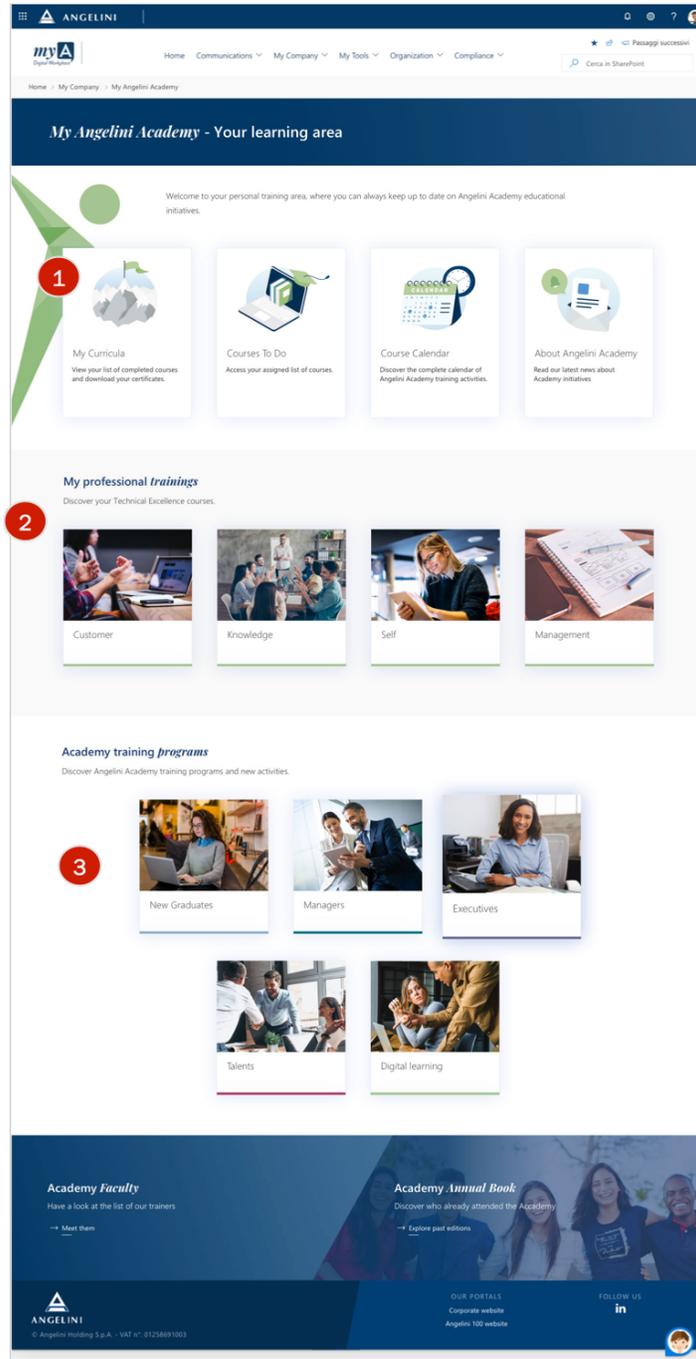


**Image 3. Angelini Intranet My Angelini Academy.** *My Angelini Academy* is the training site within MyA where users can discover courses relevant to them. *Angelini_03_Academy_desktop.png*

## My Angelini Academy Highlights

Rather than linking to a corporate training portal or displaying basic introductory text about training, the intranet team created the attractive *My Angelini Academy* training page that lays out possible actions. Users are presented straightaway with common tasks organized in a logical, aesthetically appealing manner. This results in this uncluttered, task-orientated page.

1. **Top navigation cards:** The top cards hold the most frequently accessed items. On the far left, a thoughtful feature allows users to see all the courses they have taken and download certificates of their completed training. Users can also see courses that they are required to take or consult the course catalogue to browse any that are upcoming. The far-right card shows general information about training at Angelini and lets employees browse the entire Angelini Academy catalog.

2. **My professional training:** Within each card, users can find relevant training courses based on their role.

3. **Training specific to career paths:** Each card represents the five different career paths available at Angelini, which is a nice feature of this page. Rather than having to go elsewhere to read about which training they should take relevant to their career, users can select their own career path (or another career path) and see all relevant training courses.

# News Archive
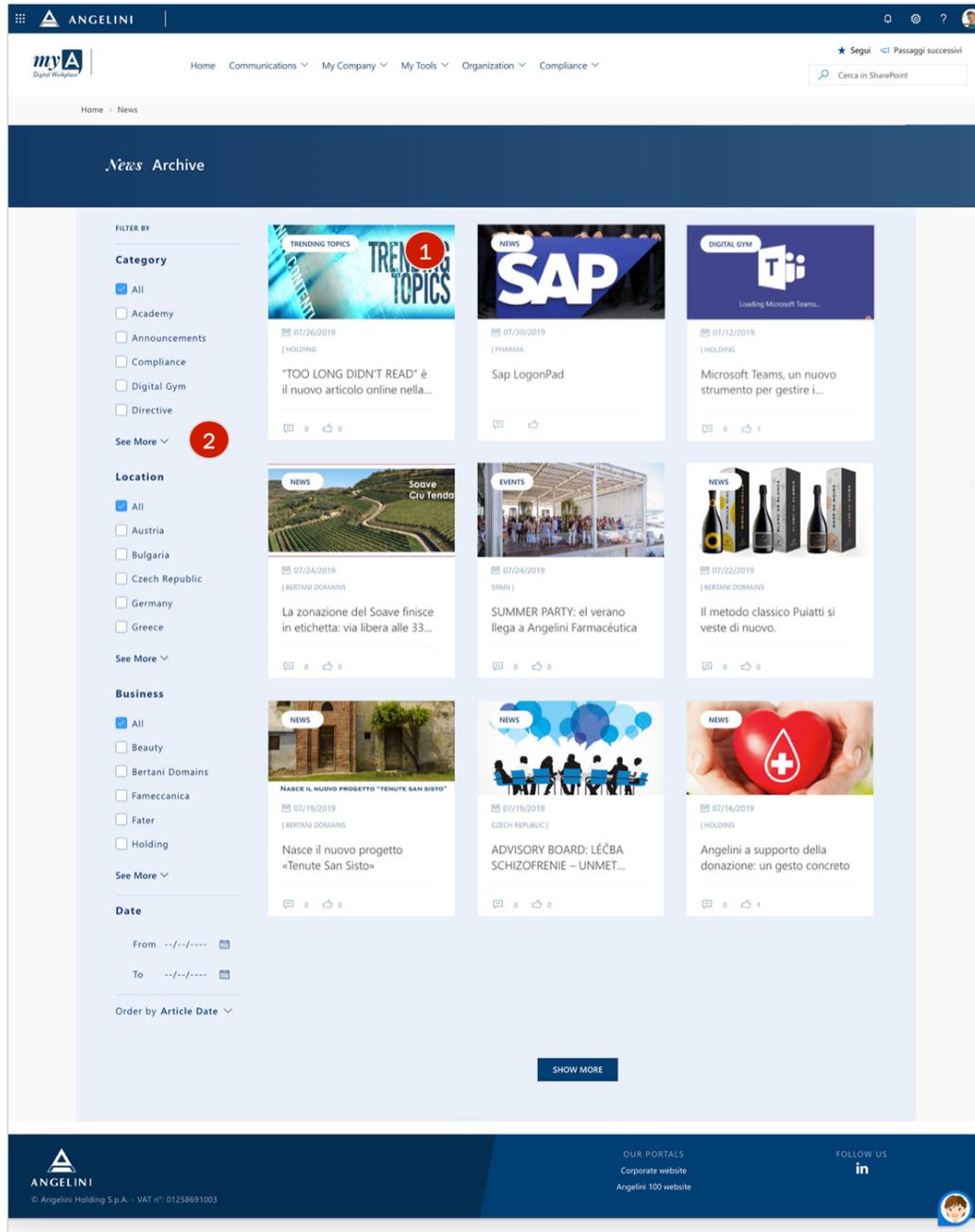


**Image 4. Angelini Intranet News Archive.** MyA offers a card layout for this news page. Users can filter news items by type, date, location, and business sector.
*Angelini_04_NewsArchive_desktop.png*

## News Archive Highlights

This clearly designed news page presents users with the latest news and trending stories, alongside useful filters.

1. **Card Layout:** MyA opts for a card layout for news items, which lets users easily scan the content. News pieces are categorized based on whether they are a trending topic, a news item, or an event, and by the posting date. The business area or location is published on each card, which helps users to identify news items of interest.

2. **Filters:** The filters down the left-hand side allow users to filter content based on location, business area, and content type. Users who are looking for older pieces can perform a date search using the date filters at the bottom.

## News Articles
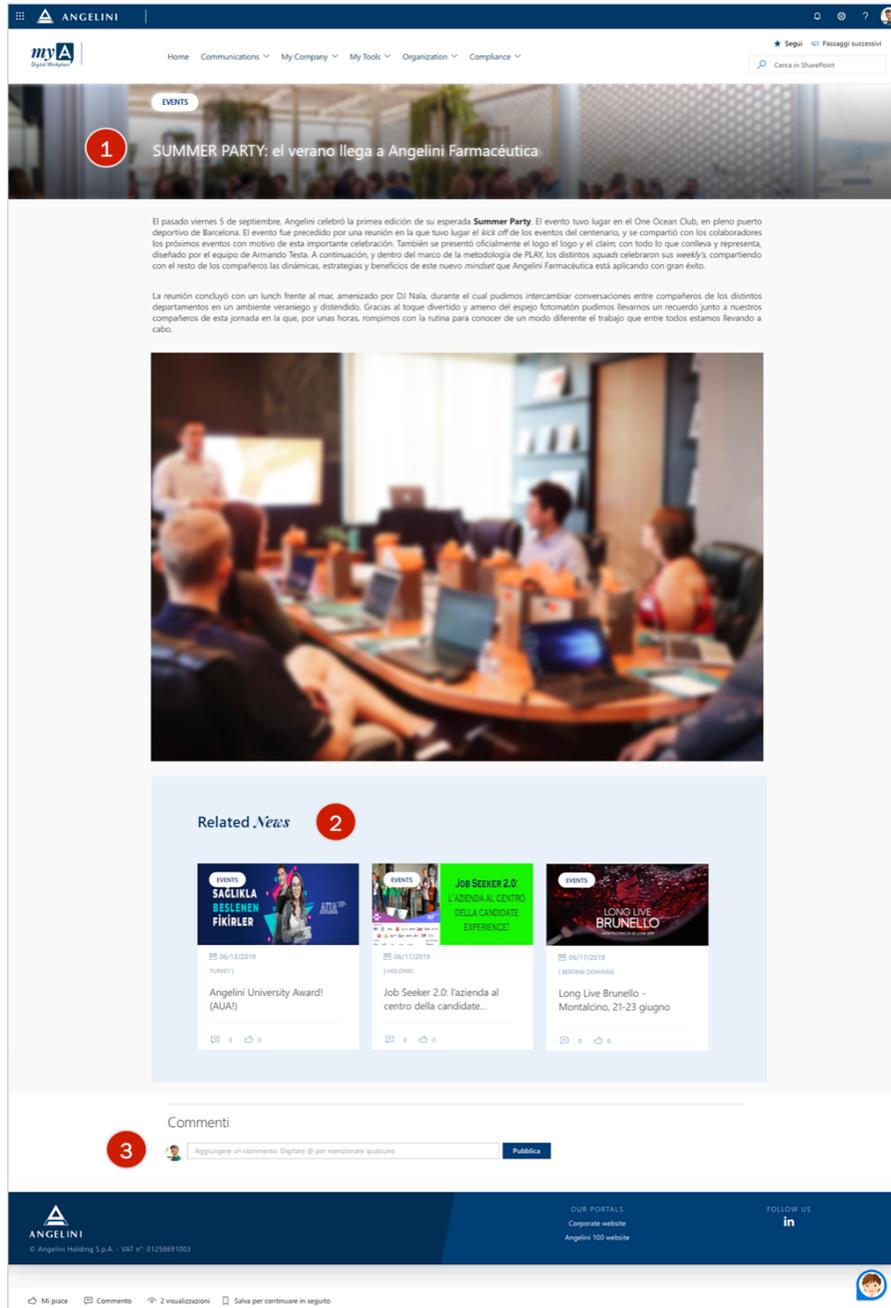


**Image 5. Angelini Intranet News Article.** This shows a MyA news article on centenary celebrations published in Spanish by the Barcelona office. If the article is profiled only for Spanish-speaking employees, it is written in Spanish. If the Spanish editor asks for and obtains authorization to upgrade the article to reach all countries, the article is translated and appears in Spanish for Spanish-speaking employees and in English for all other employees.
*Angelini_05_NewsDetail_desktop.png*

## News Articles Highlights

Anyone in the Angelini Internal Editorial Network can write news articles, and the corporate editorial team provides guidelines for writing content. This article was published by the Barcelona team and shares news about how that office celebrated the company's centenary at a summer party at the Barcelona marina. News articles are tagged, and the *Related News* section allows for further exploration of content.

1. **Banner:** The layout of news articles is simple and elegant, with a headline banner that editors can customize.

2. **Related news:** To facilitate discovery of and engagement with additional articles, a *Related News* area appears below the article, calling attention to additional news articles or related events. Rather than offer only a text link for the name of a related news piece, MyA utilizes a card layout so users can preview the news item.

3. **Comments:** Engagement on the site is promoted through comments functionality.

**Wine Shop**
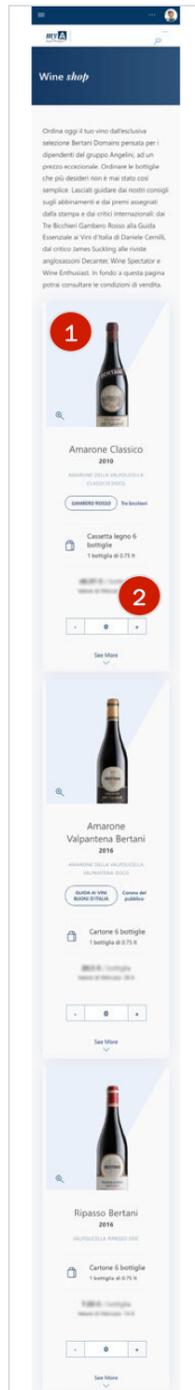


**Image 6. Angelini Intranet Wine Shop.** MyA offers employees the opportunity to buy wine from Angelini's winery at a discounted price through its mini ecommerce platform. Users can easily make these purchases from their mobile devices.
*Angelini_06_Shopping_smartphone.png*

## Wine Shop Highlights

Angelini's company diversification extends to the unexpected but beloved—wine! Even more surprising and welcome is that MyA boasts a mini ecommerce platform, *Wine Shop*, where employees can buy bottles of wine produced by Angelini's winery at discounted prices. A second ecommerce platform is dedicated to other products, including pharmaceuticals and cosmetics. MyA, like other great intranets, advertises and supports this special employee benefit. The team engaged in dedicated design and testing to ensure that the user experience was seamless on mobile devices.

1. **Product images:** The *Wine Shop* presents employees with pictures of each wine—as well details about its typology, price, and any awards it has won—in a one-page scrolling catalog.

2. **Familiar ecommerce patterns:** The ecommerce platform has familiar controls for adding and changing product quantity and handles payment on a following screen that lets users specify a debit/credit card or a bank transfer.

## Angelini Centenary Page
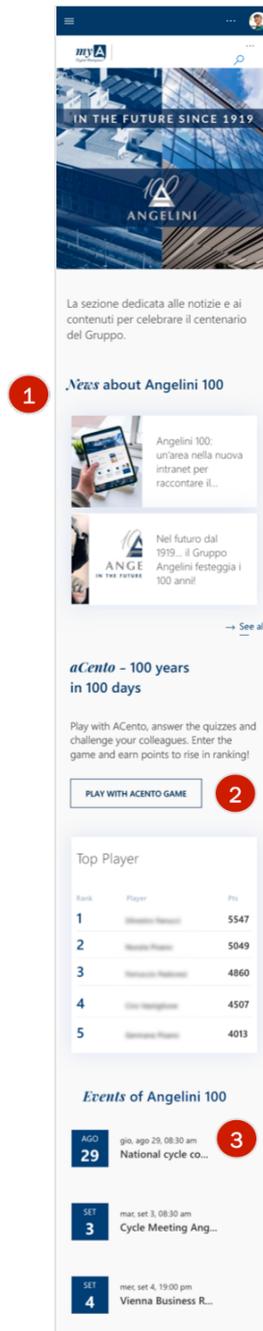


**Image 7. Angelini Intranet Centenary Page.** The MyA team marked the Angelini centenary by publicizing related news stories and events on a dedicated page; this shows a smartphone view of that page. *Angelini_07_A100_smartphone.png*

## Angelini Centenary Page Highlights

The Angelini centenary page gives a sense of how proud the company is of its achievements. To consolidate announcements and excitement about the 100th anniversary, the MyA team created a page that hosts links to centenary-related events and news. The page also has a gallery for photographs taken at some of these events and a fun, centenary-related quiz. This content curation helps employees feel like they are part of something special and promotes communication across the diverse business areas and locations—all of which is important for workplace morale.

1. **News:** All news about the centenary is tagged and pulled into this page to make it easy for users to find.

2. **Gamification:** A quiz about the company and the centenary—and automatically populated leaderboard—adds an element of fun and boosts engagement with the topic.

3. **Events:** All upcoming centenary events are also tagged and displayed in chronological order to encourage participation.

# DESIGN PROCESS AND USABILITY WORK

Technology is often cold and impersonal, but Angelini wanted to build a warm and familiar intranet, made for the people by the people. The goal was for the intranet to be an inclusive workplace that enhanced employees' working life.

To achieve this ambitious objective, Avanade, Angelini's consultancy partner, shaped an effective mix of research methods to collect both the business and the end user's viewpoints. These research activities included:

- Trend analysis
- Stakeholder workshops
- Co-design
- Employee interviews
- Personas development
- Digital ecosystem mapping
- Remote user testing
- Visual design

The following section details how the Angelini design team carried out each of these research activities, working in lockstep with Avanade.

## Trend Analysis

The purpose of the trend analysis was not only to provide the team with an overview of best practices in intranet design, but also to highlight new trends and innovative solutions. During this analysis phase, Avanade referred to outside research resources, including two Nielsen Norman Group reports: *Intranet Design Annual 2018* and *Intranet Portals: UX Design Experience from Real-Life Projects 5th Edition*.

## Stakeholder Workshops

Stakeholder workshops were conducted as co-design sessions to help the team gather requirements and facilitate idea sharing, and to serve as hands-on sessions in which every attendee was invited to become a designer. This allowed participants to put their own experiences on the table and present their personal viewpoint on design challenges. The team conducted two workshops: the first was dedicated to the intranet, and the second to the Angelini Holding and Academy websites.

Workshop participants were drawn from across Angelini's many business units and countries, with the stated goal of involving all key project actors and turning them into active participants in the design process. These workshop sessions resulted in the creation of

several key project deliverables:

- **Pain-point identification:** Initially, participants were encouraged to identify the current intranet's pain points and benefits, both to create a common understanding of the as-is state and facilitate a productive discussion around needed improvements.

- **Persona development:** Next, participants were asked to put themselves in the shoes of five pre-assigned intranet user types: production engineers, medical sales representatives, financial specialists, a marketing manager, and R&D business development team members. The groups deepened their empathy with these user types by creating personas and mapping the users' journeys through one key task each. The workshop continued with a Statement Starter exercise, in which participants were asked to reframe the initial challenge—*How might we make a better intranet?*—according to the insights gathered through pain-point identification and persona development activities.

- **Co-design:** The last phase of the stakeholder workshops gave attendees the opportunity to work on co-design activities, creating a first-level navigation scheme for the new intranet. Participants were allowed to add content and navigation items that they felt were missing or to suggest new items they would like to see added. They then used prebuilt design components to arrange the navigation elements into a design layout.

  According to insights gained during this co-design phase, it was determined that the new intranet should welcome users with a communication component—such as "latest news"—and then follow that with resources and collaboration components, which would be the heart of the intranet homepage. Customization and search were also identified as critical to the new hierarchy.

- **Mood boards:** Avanade conducted two dedicated activities that let the attendees develop visual mood boards to help define the brand's online personality (internally and externally). These exercises contributed to the visual direction for the websites and the intranet.
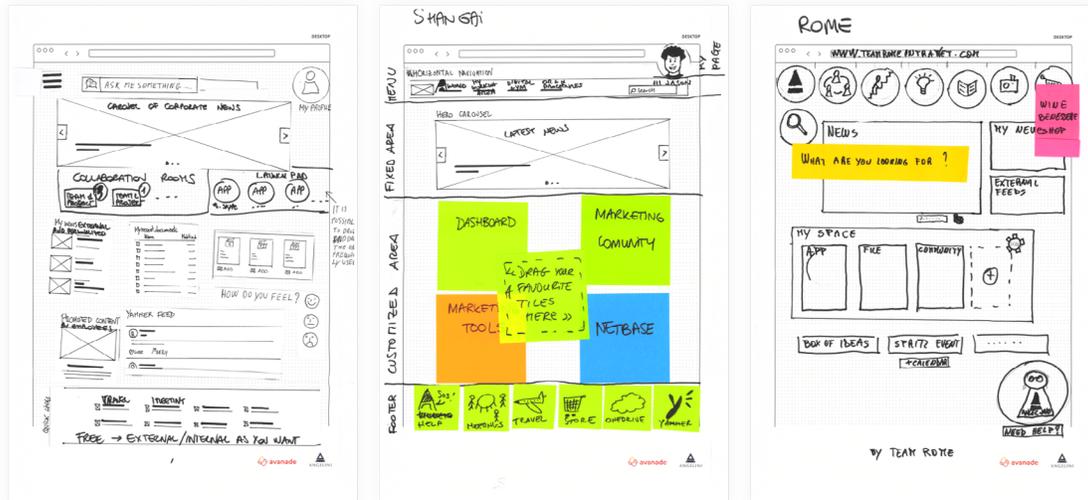
**Image 8. Angelini Intranet Design Process.** The design team conducted stakeholder workshops in an effort to instill a sense of ownership in stakeholders from across the organization. The design concepts shown here are examples of the output from these sessions, where participants mocked up navigation and identified an information hierarchy for the new homepage.
*Angelini_08_Home_designcollage.png*
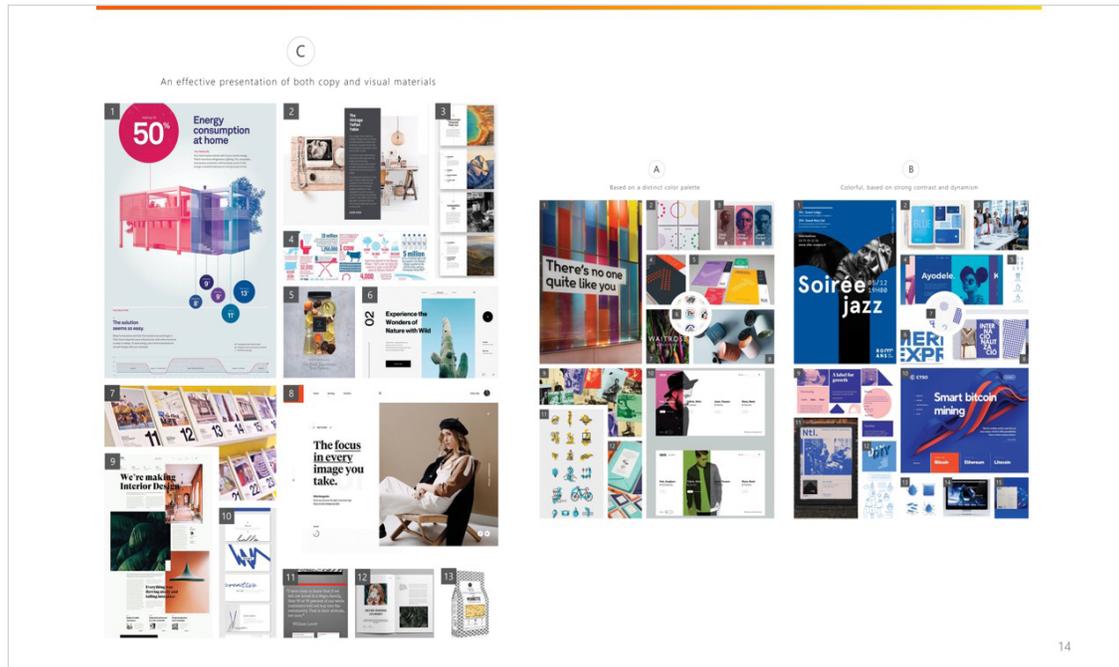


**Image 9. Angelini Intranet Design Process.** This shows three mood boards selected by stakeholders during the workshop process.
*Angelini_09_moodboard_version3.png*

## Employee Interviews

The team conducted eight face-to-face interviews with some of Angelini's potential intranet users. These sessions helped the team understand the motivations driving people to access the sites, which services and information users are interested in, and the strengths and weaknesses the current site.

## Visual Design

Informed by the findings from its suite of research activities, the Avanade creative team proposed three visual design approaches. Members of Angelini's top management team then chose the one they felt best represented the Angelini Holding brand. The visual design for both the Angelini Holding website and the intranet was tested with a representative panel of employees to validate the company management's choice.

## User Testing

The design team conducted two rounds of user testing—the first to validate the visual design, and the second to test the navigation, user flows, and how the design worked on both desktop and smartphone.

In these traditional hour-long tests, users were asked to think out loud and perform tasks. The aim of the study was to gain a better understanding of how users accomplished tasks using the navigation. These sessions gave team members an opportunity to observe interaction flows with real users and to assess how the design details translated in a desktop environment and on a smartphone.

The team performed user testing on high-fidelity prototypes built in InVision. Insights gathered through these exercises helped the team improve labeling and the overall IA, as well as review and refine some features that were perceived as too similar. Based on user feedback, the team was also able to enhance the search filters with relevant categories.

**Image 10. Angelini Intranet Personas.** This shows the overview of the persona "Anita," one of three composite user profiles determined through the team's user research activities. Based on data gathered during stakeholder workshops, the team created three user personas that summarized the main intranet user profiles and articulated their needs, behaviors, and expectations for the new tool. *Angelini_10_PersonasAnita_version1.png*

**Image 11. Angelini Intranet Personas.** This shows a more detailed view of the persona "Anita," one of the three composite user profiles determined through the team's user research activities. *Angelini_11_PersonasAnita_version2.png*

## Mapping the Digital Ecosystem

During the research phase, the team also mapped the entire Angelini digital ecosystem. This helpful activity involved categorizing all company websites, local intranets, and social presences in term of visual interface, tone of voice, and communication objectives. The goal for this exercise was to help the team gain a shared understanding of the context in which the new intranet and the web sites should work.
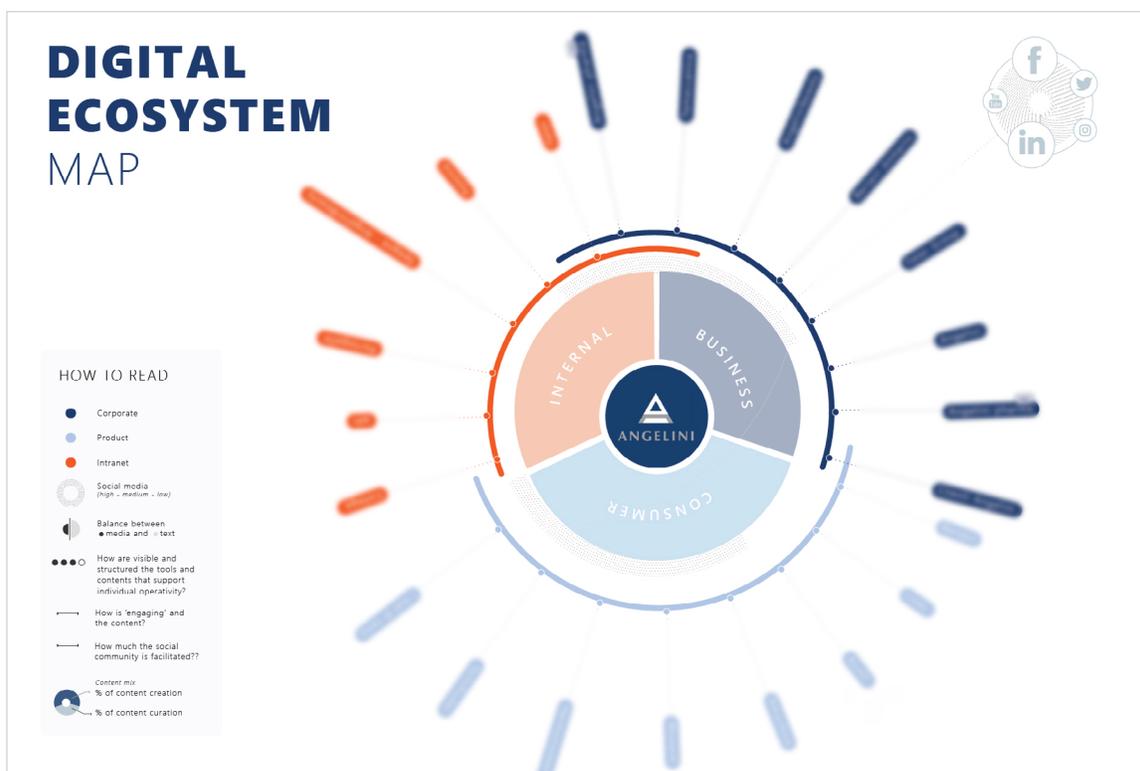
**Image 12. Angelini Intranet Digital Ecosystem Mapping.** The team mapped the company's entire digital ecosystem as part of the design process. Rather than just design the intranet as a standalone entity, the team took into account where it fit into the company's overarching digital world.
*Angelini_12_Digitalmap_version1.png*

## Designing the IA

Before working on the IA for a tool as complex and essential as an intranet, it is important to have a clear vision of all the content that the platform will house and which content needs to be managed. For this reason, the team conducted a comprehensive content inventory that encapsulated not only the assets that the old intranet contained, but also other corporate tools whose content could eventually be integrated into the new digital workplace. The team accomplished this through two key exercises:

- **Content inventory:** Avanade provided an Excel mapping of the current content, which served as a working model for Angelini stakeholders to decide what should be deleted, modified, or kept as is on the new intranet. A Visibility Roles Matrix was also created so the team could determine whether to display content according to role, geography, or division.

- **Card sort:** During the stakeholder workshops, the design team conducted a card sort to determine a potential high-level IA for the new site. During this exercise, participants clustered information pieces with the goal of organizing topics into categories that made

sense for the defined user types outlined in the personas. The groups each worked on an initial set of content from the current intranets, but they were also free to add new information and identify any that was missing. By analyzing the results of these card sorts, Avanade was able to identify patterns to consider during future design activities.

The overarching objective of these exercises was to provide a clear information hierarchy that would closely match employee needs. The IA was tested several times with employees and Angelini management, and refined according to their feedback. The ultimate design solution was a simple menu, in line with native SharePoint style.

On a technical note, the team also adopted the flat hub-site approach. This flat hierarchy, connected to a logical IA, allows the portal to change quickly in response to future organizational changes.

## Adoption/Buy-in

The internal communication department supported the MyA launch plan with several activities:

- **Pre-launch teasing:** A video teaser and three newsletters—all focused on branding— were included in the pre-launch communications given to all Angelini employees.

- **Launch phase:** The team created a video presentation and gave a workbook to all Angelini employees. A digital announcement was presented on flip boards located in all company locations.

- **Post-launch:** The team produced newsletters that included MyA updates.

This engagement plan was successful, resulting in 80% of Angelini employees, from all over the world, visiting MyA on launch day.

| Working with Outside Agencies | |
|---|---|
| Agency | Project Role |
| Avanade Italy<br><br>Innovative leader in digital and cloud services, business solutions, and design-led experiences using Microsoft technology | Business and user requirements gathering, design research and interaction design, creative direction, front-end development and SharePoint Online customization on Microsoft Office 365 |

## GOVERNANCE

The Angelini Group Internal Communication Team owns the corporate intranet. This department led the first two phases of the new intranet's implementation—the Learn phase and the Define phase. The company let this team drive the renewal process because it is accountable for and has demonstrated strong leadership in communication processes.

| Intranet Team Responsibilities | |
|---|---|
| Role | Responsibilities |
| Corporate Editorial Team | • Select, organize, and develop all intranet content, messages, and tools targeted to employees at the corporate level and sharable with all employees.<br><br>• Receive topics from local companies and evaluate them with an eye toward matching the content with the appropriate MyA channel.<br><br>• Validate critical topics and offer editorial support lo local editors.<br><br>• Monitor intranet performance (through KPIs) and communicate continuous updates. |
| Local/business/country editorial network | • Identify and edit specific news, information, or events related to their business or country.<br><br>• Define the groups, country, or global audience that must have visibility for their local news, information, and events. |
| IT Support | • Provide continuous technical support to the corporate editorial team and the local editorial network.<br><br>• Continuously update MyA functionalities. |

## URL AND ACCESS

| Access Information | |
|---|---|
| Item | Status |
| URL | http://mya.angelinigroup.com |
| Default Status | MyA is set as each user's homepage, and users cannot change that setting. Each user can also set MYA as a browser bookmark. |
| Remote Access | MyA is available with an internet connection (no VPN needed). Users regularly access the intranet easily from outside the corporate LAN, using any device and their corporate user name and password. |
| Shared Workstations | Employees who don't have personal workstations can access the intranet from shared workstations in company kiosks. |

## TIMELINE

| Project Milestones | |
| --- | --- |
| **Milestone Date** | **Milestone Description** |
| 2005 | First intranet implementation |
| 2011 | Second intranet implementation |
| 2017 | Third intranet implementation |
| November 2018 | Recent redesign project start date |
| July 2019 | Launch of new design: MyA first edition |
| September 2019 | New content implementation |
| November 2019 | Multilanguage chatbot implementation |
| December 2019 | Chatbot upgrade |
| 2020 | New tools implementation |
| **Overall redesign timeframe: 8 months** | |

## CONTENT AND CONTENT CONTRIBUTORS

| Content Development and Oversight | |
| --- | --- |
| Contributors | In late 2018, a team of 18 internal editors worked with the corporate editorial team to build an initial approach to the intranet's integrated communication plan. Members of this group were the first contributors.<br><br>Next, as part of a second phase, the Head of Group Internal Communication asked the internal editors to seek out other people who might be interested in becoming intranet editors. Currently, there are more than 60 MyA content contributors who have been trained and are engaged. They communicate with each other through the digital tool *Teams* to carry out an organized and structured editorial process.<br><br>These 60 editors in the extended Internal Editorial Network meet in person once or twice each year and participate in monthly video calls. During the yearly meeting, they discuss the local editorial plan; during the monthly video calls, they review the global editorial plan developed by the corporate editorial team and make decisions about what should and shouldn't be published. |

| Contribution | The company encourages contribution in several ways:<br><br>• A *Teams* community encourages collaboration and document sharing.<br><br>• An external resource helps young editors become more proficient in content management.<br><br>• International and inter-business workshops encourage content cross-fertilization across groups and businesses in different regions. |
|---|---|
| Training | The company devotes considerable time and resources to training activities. The training includes digital learning, master classes, and workshops that focus on providing practical information to support contributors' day-to-day needs.<br><br>Further, a technical helpdesk is always available to help content providers solve problems. |
| Maintaining Quality | Maintaining content quality is a critical process, particularly in the smallest and least-structured countries. In those locations, communication specialists don't yet exist. Corporate Editorial Team members therefore provide continuous training, observing and providing feedback to people who are candidates to become communicators, but who do not yet have proper communication skills for the job. This process is time-consuming for the central team, but it is driven by an awareness of how important internal communication is for the company. |
| Management | Angelini has developed a content management training program in collaboration with an external global partner; this partner also developed the content guidelines for the company's editorial network. |
| Culling Content | The content inventory was a valuable tool to help create awareness about just how much content was housed on the previous intranet. It also provided a great foundation for the team to begin thinking about what content was still relevant and up-to-date, what should be refreshed, and what should be deleted. It also provided a good foundation to help the team stay on top of content freshness into the future. |

## TECHNOLOGY

| Technology | |
|---|---|
| Category | Technology Used |
| Web Server Hardware and Operating System | SharePoint Online<br><br>Azure PaaS Web APIs to provide the integration layer in a micro-services approach |
| Bug Tracking/Quality Assurance | Azure Application Insight |
| Design Tools | Sketch, InVision, Principle |
| Site Building Tools | Integrated Development Environment (IDE): Visual Studio Code, Visual Studio<br><br>Front-end frameworks: SPFx 1.8, ReactJS<br><br>Back-end frameworks: .NET Core |
| Content Management Tools | SharePoint Online modern experience |
| Search | SharePoint Online |
| Other Functions | Office 365 service integration via Graph APIs |

## MOBILE

MyA is accessible via mobile devices through responsive web design.

The design team adopted a mobile-first approach, optimizing for smartphone first and then using progressive enhancement to design up to the tablet and desktop views. This approach was critical, as the Angelini workforce was eager for a rich mobile intranet experience, as evidenced by initial site traffic. In the 15 days after the official intranet launch, 30% of unique visitor traffic came from mobile devices.

Further, this initial site traffic confirmed a spontaneous and constant use of the new intranet through mobile devices. Unlike on workstations, where the intranet homepage is set by default on the browser start screen, mobile device access is motivated entirely by the self-interest of the employees, who are not otherwise compelled to visit the site.
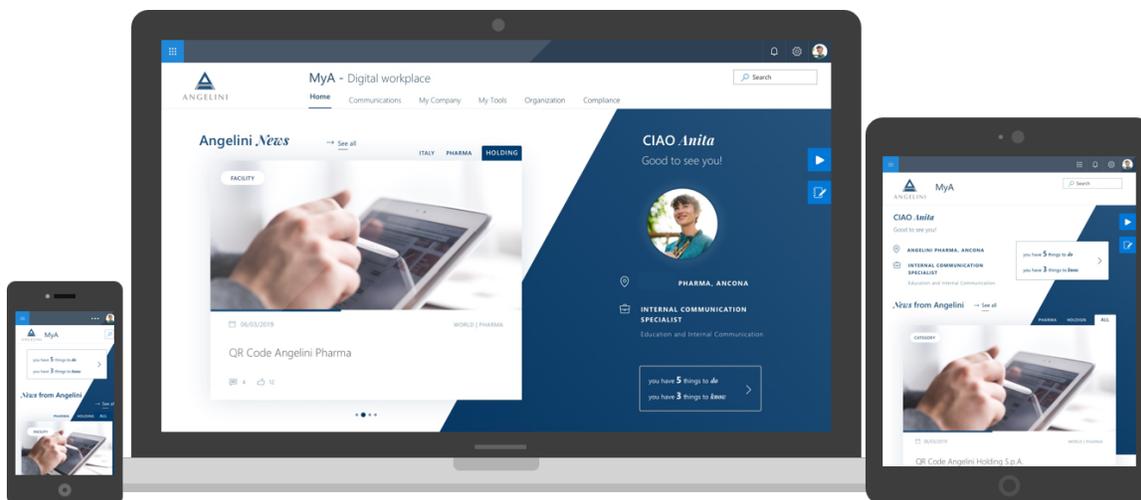
**Image 13. Angelini Intranet Mobile Approach.** This shows how the Angelini intranet homepage scales for different viewing environments.
*Angelini_13_ResponsiveView.png*
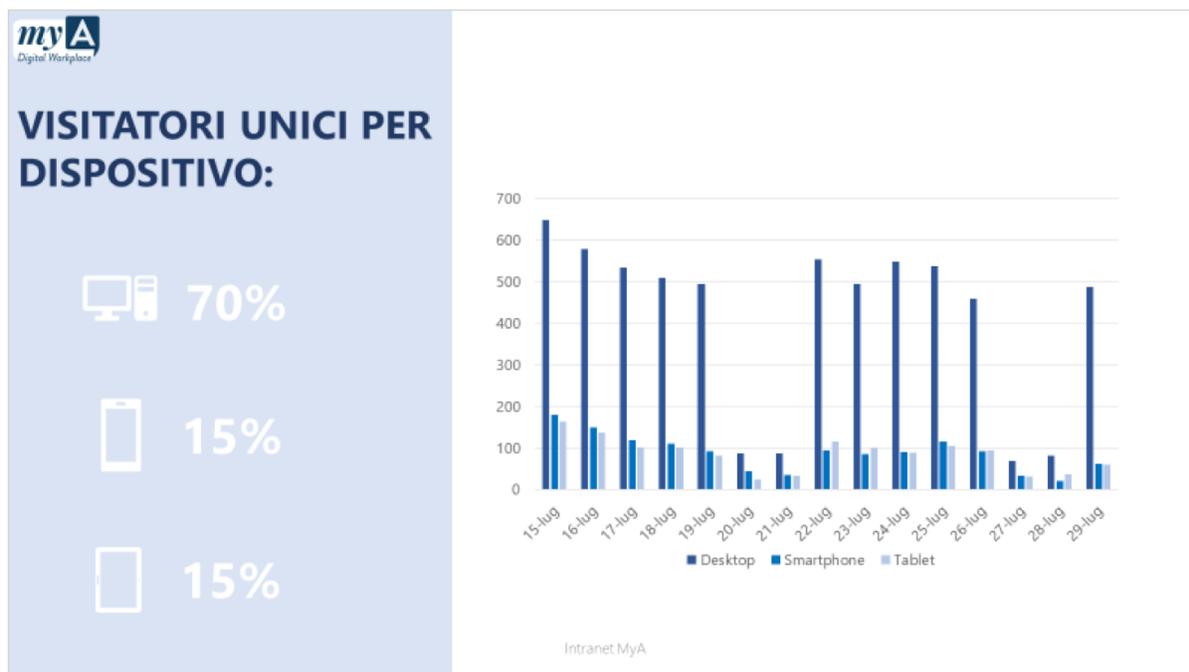


*Initial mobile usage stats showed that 30% of traffic came from users accessing the intranet from a mobile device rather than from their desktop workstations.*

## YAMMER

Angelini decided to adopt a gradual approach to corporate social media, so Yammer is available only to a select group of employees in the communications department. The goal with this limited rollout is to test the application during the first year post-launch, and then decide whether or not to open the tool up to the entire community. Still, some social features are now available to everyone: all users can comment on news articles and reply to the *Propose your content* form to suggest topics they want to see explored in the intranet's communications area.

# SEARCH AND SEARCH RESULTS

Intranet search is based on Office 365 search capabilities, so users can search the intranet for content stored across the entire Office 365 tenant. This reduces silos and simplifies the discovery of other platform services, including teams and OneDrive for Business.
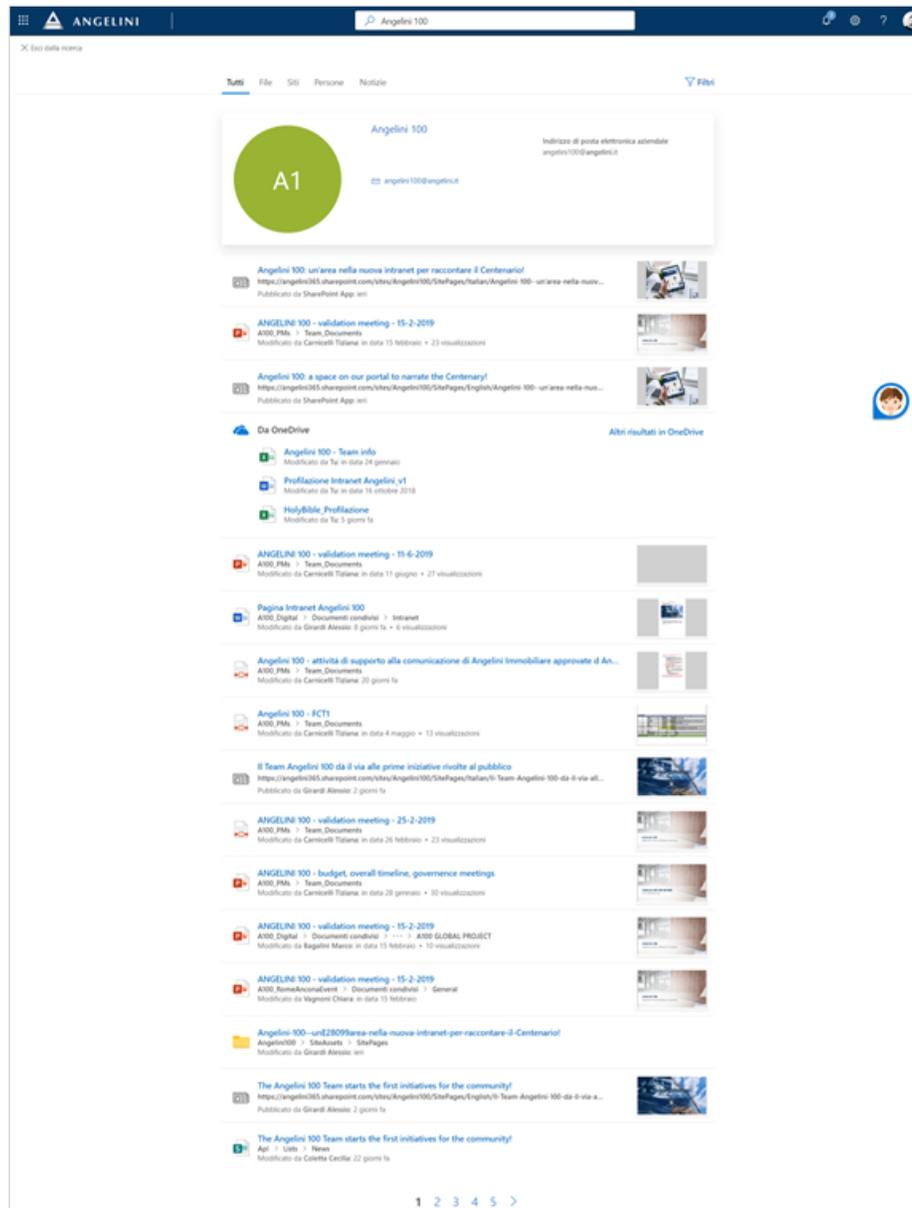


**Image 14. Angelini Intranet Search Results.** This screen shows a typical search results page on the Angelini intranet. Currently, the filters available on the search results page include only the ability to filter by content creation date.
*Angelini_14_SearchResultPage.png*

## ROI

Angelini defined its main ROI measure as the "spontaneous daily use of the intranet." The team measures that use through a set of metrics it determined could be analyzed immediately following the go-live date, including visits summary, visit duration, user country, device, number of actions completed, user flow/path, entry page URLs, downloads, and metrics broken down by page.

While all of these measures point to the site's success, other softer measures mean the most—including that the intranet has become the company's "source of truth." Employees know that the intranet houses everything they need to do their jobs, but it also offers them much more. They can collaborate. They can chat with each other. They can share documents and information. And, through this platform, they now understand the company and its business better than they ever have before.

Employees express their satisfaction through likes and comments. And, perhaps most importantly, they are also generous with negative feedback. If something is not working well, employees are not afraid to say so—but always with the goal of trying to make it better.

## LESSONS LEARNED

Angelini met the business challenge of building a successful intranet by creating a working tool that serves all of the group's companies equally well. The first and fundamental step in that process was to ensure that every design decision translated into action from the employees' viewpoint, keeping in mind their daily workplace needs.

The Angelini team shares some of the ways it accomplished its goals:

- **Don't underestimate the UX effort required.** "Angelini created a solution that balanced equally the UX and the development costs, in terms of real costs and resources required. This allowed the project to be people-centric, from beginning to end. Even the intranet launch took advantage of this approach, which resulted in minimal fixes required during the post-go live period."

- **Involve users early and often.** "Don't be afraid to involve your employees during all project activities. Let them be a part of the project, even just for day. This creates good will and engagement at all levels of the organization. It also helps set the right expectations and contributes to good conversations about the new tool, right from the start."

- **Dig deep into the technical platform constraints and share them widely.** "A tight collaboration between the design and the technical team is the foundation for a successful project that involves a complex platform such as SharePoint. Achieving a good balance between customized UI and out-of-the-box features can set a team in the right direction. In addition, share the technical constraints with the project stakeholders right from the beginning of the project. This means boundaries will be clear and expectations will be realistic. This approach to the work is extremely helpful for everyone involved."

# Bank Spółdzielczy we Wschowie

## OVERVIEW

### COMPANY

Bank Spółdzielczy we Wschowie is a local cooperative bank and member of Spółdzielcza Grupa Bankowa (SGB-Bank). It offers a wide range of retail, corporate banking, and insurance products and services to private individuals, business entities, farmers, and local authorities.

**Headquarters:** Wschowa, Poland

**Company locations:** The bank operates in three provinces: Dolnośląskie, Wielkopolskie, and Lubuskie.

**Locations where people use the intranet:** Employees at all bank locations use the intranet.

**Annual revenue:** N/A

### THE INTRANET

**Users:** 250

**Mobile approach:** None

**Technology platform:** The intranet application is based on the Linux operating system. The application engine uses PHP7 and Symfony Framework, and a MySQL database is used for data storage.

### TEAM

The team consists of 11 people. Employees of the bank's Head Office also participate in the application design process and are responsible for business processes.

**Application administrators:** Sebastian Mika, Artur Proniuk, Magdalena Ślotała, Radosław Iwaszko, Adam Jankowski, Marcin Wach, Marek Kała

**Design team:** Artur Wichliński, IT Manager; Sebastian Ratajczak, Senior Developer; Tomasz Wójcik, Developer; Łukasz Zychal, Developer

## INTRANET TEAM



***Team members shown here*** *(left to right): Tomasz Wójcik, Artur Proniuk, Marcin Wach, Sebastian Mika, Łukasz Zychal, Artur Wichliński, Radosław Iwaszko, Magdalena Ślotała, Marek Kała, Adam Jankowski, and Sebastian Ratajczak.*

## HIGHLIGHTS ABOUT THIS WINNER

How do you say "applications and more applications" in Polish? The Bank Spółdzielczy we Wschowie intranet team set out to build an ecosystem to streamline business processes for its employees. What it created was that and more, with a wide variety of tools and additional meta-tools that track, support, and communicate about those tools. This digital transformation resulted in more-productive employees and measurable financial gains.

- **Designed and developed for the bank's true processes:** The team researched the bank's already-implemented processes and then systematically created elements to digitally support those processes. By defining the concepts of 1) the service, 2) the customer, 3) the user, and 4) the service owner, the team was able to design an intranet that provided the business with the best possible services.

- **Designed internally:** While external consultants and third-party software tools can improve projects, this team decided to keep all the design and development in-house. Most of the applications described in this case study are proprietary, created at the bank based on the employees' needs. One of the greatest benefits the organization and intranet team have realized from the choice to design and develop internally is complete control. During tool creation and through subsequent updates, the team proved it has the knowledge, resources, and flexibility to achieve its far-reaching goals.

- **Communication:** With alerts shown on global navigation menus, news, and updated app content, the intranet is a reliable medium for communicating with employees at all 22 bank branches.

- **Countless applications:** The intranet supports sundry applications that employees use for their jobs. These applications cover everything from core banking tools to document circulation and everything in between.

- **Reuse of information:** Rather than reinventing the wheel in service of ever-evolving bank procedures and creating applications that employees need to support them, the intranet team learned from the body of existing information and apps. In doing so, it was able to reuse and combine features and information, and did so whenever possible. For example, it reused an end-user software app that allows versioning of business-relevant files and publishes those files in one place so employees can use them as a template. In another example, the team used the List of Procedures application (which gathers all procedures used in each department) to show only procedures pertinent to the logged-in user, based on his or her department. This application not only makes it easier to train new employees so they understand what to do (such as in the event of an emergency) but—from an operations perspective—it also provides the intranet team with the knowledge it needs to combine procedures. The team can also use the application to create an overall system report to share with bank leadership.

- **Integration with important tools:** Users can use the intranet to perform tasks in other tools, such as creating tasks in Microsoft Outlook, getting reminders about upcoming tasks, giving updates to managers about their employees' tasks, and making hands-free telephone calls. HelpDesk support staff can run a chat session in the intranet using Cisco Jabber in the background. The team selected the most impactful apps to integrate, so employees can do common tasks all in one place and not have to switch between tools.

- **Imaginative niceties:** Creative features—such as the ability to search within a document without opening it, search within a table's column, and batch print multiple documents—make the intranet flexible and help employees remain in control.

- **Consistent visual design and branding:** Like the bank's public-facing website, the intranet uses the Oxygen regular and Oxygen light typefaces, and a combination of dark red, green, and grey on a white or light-grey background.

## BACKGROUND

Wschowa Poland, where the bank was founded, is a city with traditions dating back to the 13th century, but such traditions also bring new challenges. That was the situation Bank Spoldzielczy we Wschowie found itself in as the institution aged and communication technology marched forward. The bank needed a new intranet so it could provide a coherent communication ecosystem to support its employees—all of its employees, from the IT department to the bank's head office.

The core idea driving the intranet project was to streamline business processes, which would then translate into specific financial gains for the organization. The team charged with bringing this vision to life determined on day one that the best way to accomplish this goal would be to develop a custom solution and to hand-code it themselves, using open source tools. This decision had many upsides. It would give team members the ability to create a visual design without compromise. They could also decide where and how to arrange design elements for optimal use. And they could develop a solution whose code they would own forever. But all of that specificity and customization would come at a price and require a high level of human resources to make it happen. And yet, for this team's money (and time), the approach's good far outweighed the bad, so it forged ahead.

## Challenges

Creating a custom ecosystem from scratch is not easy, but the bank's IT team met the challenge head on and found ways to solve the approach's many issues.

- **Communication is not always easy:** Communication between business and IT has always been difficult, but to make this project work, employees at headquarters and in the IT department had to find effective ways to work together and bridge the communication gap that existed between them.

- **Custom isn't easy:** When the intranet project began, there were no tools in the bank that would support the types of internal communication services the organization needed. Given this blank slate environment, the team felt that the best way forward was through a custom solution, but the resources and budget needed to undertake such a project are incomparable compared to simply adopting an off-the-shelf platform. Regardless, the team committed to creating the new company intranet without any support from external suppliers. It also committed to providing applications and solutions at the highest level of quality, despite the fact that neither the team nor the bank were large organizations with resources to spare.

- **It takes grit and determination:** The IT team behind this custom platform was small— just three developers and eight engineers—but their level of determination was mighty. They didn't let their size hold them back from delivering a great product.

- **Support must come from above:** Bank Spoldzielczy we Wschowie is 70 years old, and its leaders possess the wisdom of elder statesmen. It is not, however, an institution stuck in the past. In fact, the bank's culture is grounded in a foundation of innovation, and the IT team leveraged that wisdom and took advantage of its forward-facing momentum.

The team's willingness to take on these challenges paid off. The new intranet is not only the bank's primary internal communication platform, it is also a collection of web applications that allows employees to find all the information they need—all in one place—in a manner that is organization-specific rather than an adaptation of a one-size-fits-all solution. By meeting this

digital challenge in this way, the organization is positioned to succeed both today and far into the digital future.



**Image 15. Bank Spółdzielczy we Wschowie's Previous Intranet.** The previous version of the intranet homepage. *BSWschowa_01_home_previousVersion.png*

# DESIGN REVIEW

## Homepage



**Image 16. Bank Spółdzielczy we Wschowie Intranet Homepage.** The new homepage makes it possible for users to access the numerous applications they need for their work. *BSWschowa_02_homePage_live.png*

## Homepage Highlights

The Bank Spółdzielczy we Wschowie intranet homepage offers users a good starting place, with news at its center and callouts to other important information and tools.

1. **Global navigation:** The global navigation menu spans the top of the homepage and all other intranet pages. Although light grey text is not always the most legible, in this case it works because of the clear type, bolding, size, and the light page background color. The red line below the navigation helps it to further stand out as a static area on all pages. Creating the top-level structure in an IA, and then building the global navigation, is one of the most difficult intranet design tasks. The team pulled through in this case with top-level terms—*applications, departments, workflow, helpdesk, and board*—that are different enough from one another that users can make informed choices about which one to click.

2. **Search:** The site's search field is always present to the right of the global navigation menu, and is neither collapsed nor hidden. This allows employees who know a term they are looking for to easily search rather than browse.

3. **Quick access:** A flag icon, to the right of the search field, appears on all intranet pages. With this, employees can find shortcuts to websites that are useful for their work. The image below shows what it looks like when the flag icon is clicked:
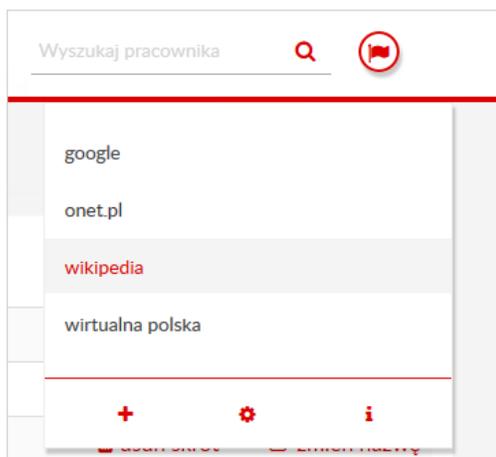


4. **Updates:** Numbered red dots show how many documents the user has yet to read in that section. Blue dots indicate documents that the user is already working on. If the user had both unread and in-progress documents both red and blue dots appear (see below). This design choice helps employees keep track of when and where there is new information they may need.
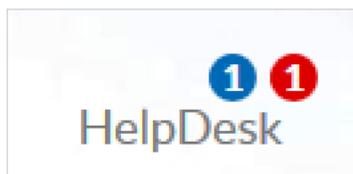
5. **News:** Top news stories appear in the homepage's main content section. Each story appears in a card with an image and title, icons that indicate the number of photos available with the story, and the number of comments received next to the date and time.

6. **Left rail:** Various current information appears down the left rail of the page, including currency exchange rates and meeting dates. Toward the bottom, cards link to important apps.

7. **Tools list:** A set of icons arranged vertically down the right side of the homepage provides logged-in users links to their most commonly used applications. These links are provided automatically based on the user's role.

# Integration with Applications
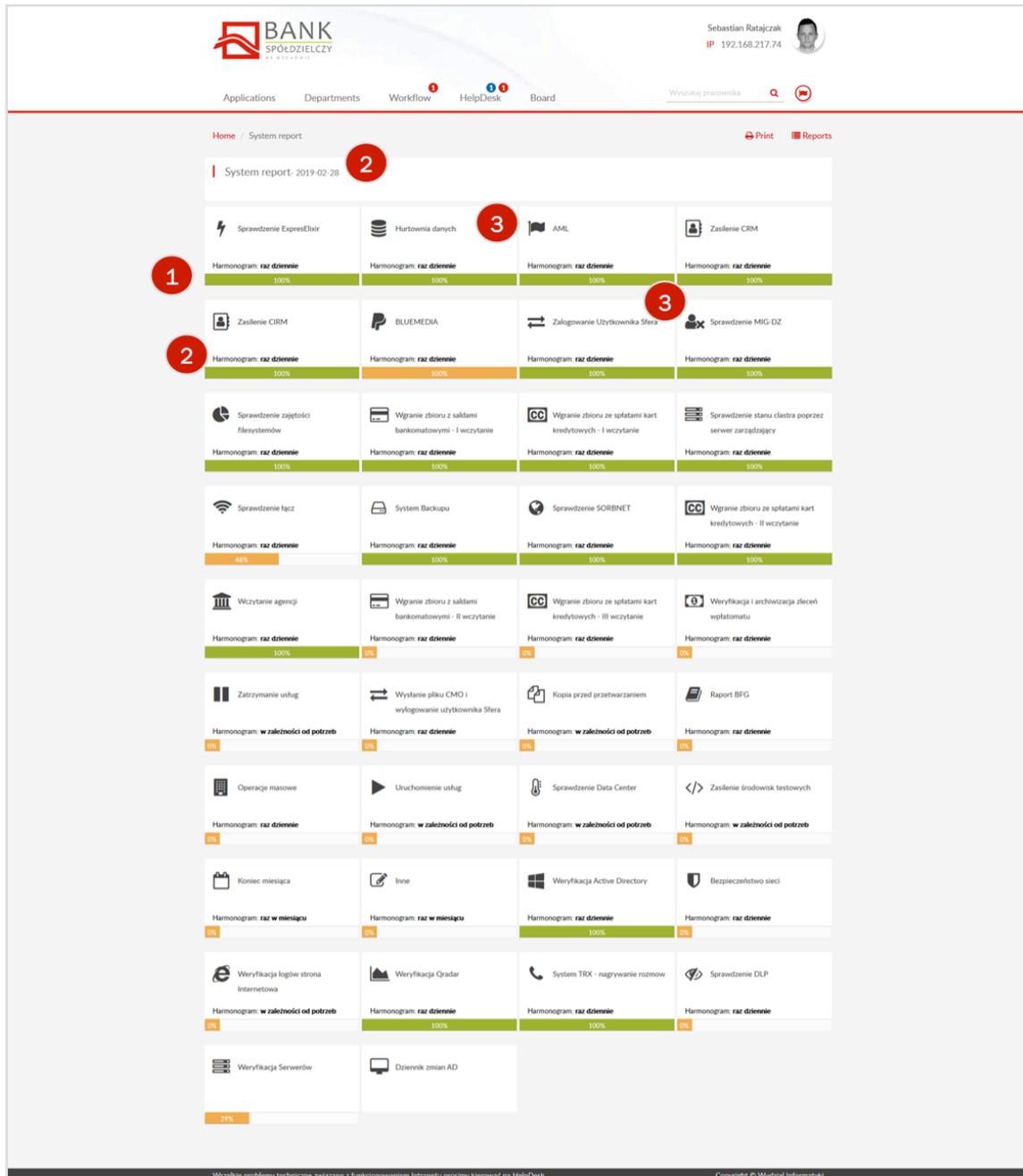


**Image 17. Bank Spółdzielczy we Wschowie Intranet Applications Integration.**
Application usage is tracked in an application designed for this purpose.
*BSWschowa_03_systemReport_live.png*

## Integration with Applications Highlights

The Bank Spółdzielczy we Wschowie intranet provides a collection of applications that let employees find and access what they need all in one place. This increases employee productivity and confidence that they are following the right process and referring to the correct information. Employees can also better support and serve both internal and external customers using the intranet's automated, up-to-date applications.

Each application is systematically monitored, and team members communicate about application health and whether the apps are updated.

This approach gives the bank certain financial benefits and has considerably diminished the number of problems reported by employees.

1. **Applications reporting:** The *system report* app displays a card for each application, with a horizontal barometer chart and a percentage indicating how well the app is performing.

2. **Time period:** In this daily report, each graph shows all the events that occurred within the previous 24 hours. The date is indicated at the top of the page. The label *harmonogram: raz dziennie* (literally translated as *schedule: once a day*) communicates this.

3. **Core applications:** The application name and an associated icon appear at the top of each card. *Hurtownia danych (data warehouse)* and *zalogowanie uzytkownika sfera (user login sphere)* are just some of the core banking applications included in this report and the bank's digital workplace. Each of these apps was created in-house and is accessible from the intranet's *Applications* menu. Other applications linked to from the intranet include the following:

   - Credit risk assessment: for client evaluation

   - Data warehouse reports

   - Reports platform: employees enter data without using Excel sheets for reporting to headquarters, and Head Office employees receive ready-made statements from the intranet

   - Internal controls with full reporting for the controlling unit

   - Monitoring and reporting of settlements between banks

   - Bank risk department

   - OPERISK: registers and analyzes risk

   - ATM monitoring: informs service staff about how to credit the device with cash and how to settle it

   Additional support applications include:

   - Register of resolutions: collection of all resolutions adopted by the bank's Management Board and the Supervisory Board

- Data protection and data security: a set of applications to help improve the work of bank security officers

- Register of contracts: lists contracts concluded by particular departments of the bank's Head Office with external entities

- Ordering system for internal orders

- HelpDesk

- Employee database

- Intern and apprentice database

- Employee benefits

- Training

- Incident register: lets employees register security policy violations

- Register of consents for making an image available on the intranet

- Early warning system for security threats

- Customers' requests for sharing personal data

- Personal data disclosure

- Office of the Management Board: handles general matters related to the Management Board

- Collection of links needed to administer the bank's data center

- Electronic version changes system: a set of tools that supports the work of the IT system administrator and system owner in strict alignment with GDPR and Polish Financial Supervision Authority requirements

- Data quality book: manages the quality of data in bank applications

- List of procedures: gathers all procedures used in each department

- List of all paper documents

- Collection of all applications used in the bank, including next releases of patches and new versions; IT can run the entire process of testing changes and introducing them into the production environment

- End-user software: publishes versions of business-relevant files in one place so that employees can use them as a template

- Human resources

- Business trip plans

- Car booking

- Vacation requests: Active Directory allows for automatic time blocking

- Training: manages internal, external, and e-learning training

## Exchange Rates
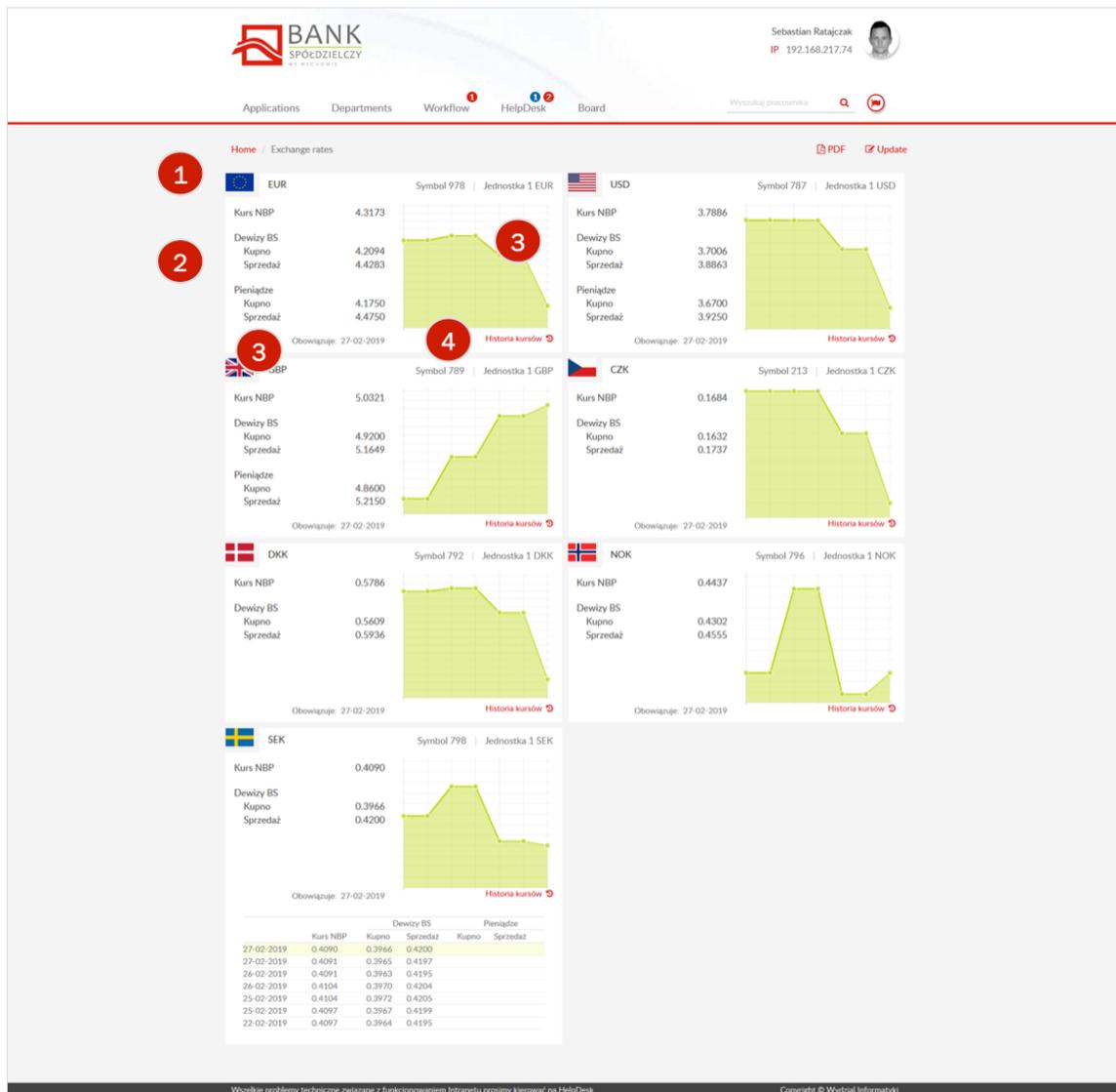


**Image 18. Bank Spółdzielczy we Wschowie Intranet Exchange Rates.** This shows exchange rate charts for currencies with which the bank often deals.
*BSWschowa_04_exchangeRates_live.png*

## Exchange Rates Highlights

Many bank employees work with exchange rates when doing their jobs, so accessing the most current rates is an important task. The exchange rates page, accessibly from the homepage, displays simple charts, each with the exchange rate for a different currency with which the bank often deals.

1. **Identifiers:** Each currency is identified by the abbreviation for its name, as well as the related country or region's flag. Both the text and the icon help employees to quickly recognize and recall the currency.

2. **Prices:** The latest purchase and sale prices appear in a table to the left of the chart.

3. **Day:** The prices are for the current day, which is listed below the table.

4. **History:** A history link below the chart leads to options to view different time periods.

## Information (Document) Workflow



**Image 19. Bank Spółdzielczy we Wschowie Intranet Information (Document) Workflow.** The team embedded helpful workflow functionality for many kinds of documents and forms. *BSWschowa_05_workflowDocuments_live.png*

## Information (Document) Workflow Highlights

In an effort to improve information flow while also eliminating paper documents, the intranet team created a document circulation system (*SOD*). Accessible from the *Workflow* menu, SOD gives bank employees access to various digital forms, documents, and processes, including invoices, receivables, letters created by departments or branches, legal documents, and faxes.

Consolidating these documents and forms in one area makes it easy for employees to find, share, use, and reuse them. This application enables teams to keep the documents up to date and remove out-of-date ones, so employees can always access the current version.

1. **Filter:** Users can filter the list of all documents based on metadata, including the document's date, ID, author, and more.

2. **Show number of entries:** A simple drop-down at the top of the table allows users to choose how many items they want to show. This gives employees control and flexibility.

3. **Identifying information:** The top row of table cells includes categories of information that help employees identify the document they want. These elements include: document ID, date, subject, author, classification, and status.

4. **Sorting and searching:** An interesting context-driven search enables users to search by topic. Each search field below the main topic area cell allows users to search for items only in that column. This behavior is communicated in the UI based on the search field's position, close to the title, as well as the prompt text within each search field, which reads, for example, *Search ID* in the *ID* column. Employees can also sort the table by any of the columns simply by using the arrow icon on the right side of each cell.

5. **Print:** Employees can check the checkbox to the left of each item then click the *Print* selected button at the bottom of the page to print.

## Document Within Workflow



**Image 20. Bank Spółdzielczy we Wschowie Intranet Document within Workflow.** Opening a document in the workflow application displays all the information related to the document, including authors, edits, and attachments. *BSWschowa_06_workflowDocument_live.png*

## Document Within Workflow Highlights

Each document has its own extensive document management information stored with it in the intranet's workflow application.

1.   **Summary and status:** Colored bars at the top of each document provide the most rudimentary information: when the document was created, to whom it's available, its status, and the document number. A grey bar below the summary tells users what type of document it is. In the example shown here, it is: *pismo na posiedzenie zarzadu* (translated literally, *letter to the board meeting*).

2.   **Basics:** Basic information about the document appears in the first section. The name, such as *wykonania prac procesach zamkniecia roku 2018* (translated literally, *performance of work in the closing processes of 2018*), appears at the top. Next comes other information, such as date of discussion, barcode (EAN), and archive category.

3.   **Attachments:** Related attachments appear in the *Attachments* section and can be opened from here.

4.   **Versions:** Users can track the history in the *Version* section, which shows the date and time of the most recent edits and the author of those edits.

5.   **Other Details:** Other sections in the document include more information about its authors and history.

## Document Template
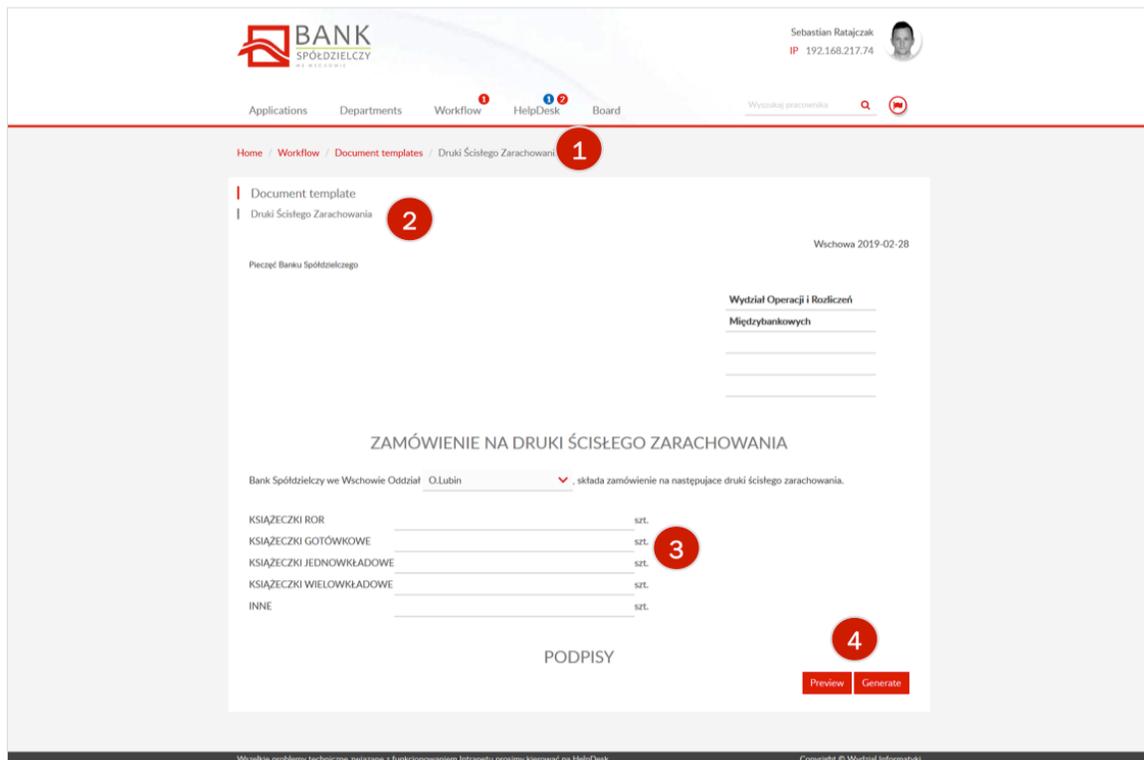


**Image 21. Bank Spółdzielczy we Wschowie Intranet Document Template.** The template for creating a document uses progressive disclosure, hiding sections so that it appears short and simple until sections are needed.
*BSWschowa_07_workflowDocumentTemplate_live.png*

## Document Template Highlights

To make document creation and usage easy for employees, the team created templates, or forms, for different document types. These templates guide authors through the process of adding the appropriate information.

1. **Templates:** Templates are found in the *Document templates* section of the *Workflow* application, as seen in the breadcrumb.

2. **Type:** The name of the document type, such as *druki scislego zarachowania* (translated literally, *strict accounting prints*).

3. **Fields:** Simple fields allow users to fill in the document template and create a thorough document.

4. **Finish:** Buttons allow employees to preview the document before creating it, and then allow them to create it.

## Software Versioning Tracking



**Image 22. Bank Spółdzielczy we Wschowie Intranet.** The intranet's many applications are tracked, communicated about, and kept up to date via a software versioning application. *BSWschowa_08_softwereVersioning_live.png*

## Software Version Tracking Highlights

Organizations in the financial sector are known for being superior at tracking things. At Bank Spółdzielczy we Wschowie they are vigilant about it and even included software versions as part of this work. One application that the bank created holds a collection of all bank software applications and operating systems and helps IT manage them mindfully. The application controls the next patch releases and new versions, and it allows IT to run the entire process of testing changes and introducing them into the production environment.

1. **Filters:** Given the volume of bank applications, the team made the list of them easier to scan by providing an alphabetical listing filter at the top, as well as checkboxes to show only documents that are highly relevant (*wysokiej istotnosci*), in production (*produkcyjny*), and no longer in use (*wycofany*).

2. **App list:** Each application is named in the list, with its details collapsed. Hiding the details by default makes working with this long list possible. The icons on the far right of each row allow users to edit the app's name or the full description.

3. **Details:** Expanding an application's details reveals a great amount of information about that software and its use at the bank, including the manufacturer (*producent*), where it is installed (*miejsce instalacji*), number of licenses (*llosc licencji*), and the number of related HelpDesk requests (*liczba zgloszen z HelpDesku*).

## Board Meeting Notes



**Image 23. Bank Spółdzielczy we Wschowie Intranet Board Meeting Notes.**
The title, *Board meetings/Different matters from SOD,* displays in the first row of
the second table. Column labels relate to topics, people, decisions made, and
more. *BSWschowa_09_boardMeetings_live.png*

## Board Meeting Notes Highlights

The intranet makes it possible for all bank employees to stay abreast of what the Board of Directors is discussing. A page of summary tables of topics discussed at the Board of Directors meetings is accessible from the homepage. Users can look at credit-related topics (first table) and other topics (second table). Each table is simple to scan and offers flexibility, as users can choose which elements to show.

1. **Summary tables:** The summary tables of topics discussed at the board meetings let users examine topics related to credit (first table) and topics related to everything else (second table).

2. **Change how many entries are displayed:** Users can choose how many entries they want to display from a drop-down list control at the top of each table.

3. **Display approved or denied:** Using the *Tak* (yes) / *Nie* (no) toggle above and to the right of each table, users can choose to display the approved or rejected items discussed by the Board of Directors.

4. **Create and download:** Employees can download reports that include only the topics in which they are interested by using the checkboxes in the leftmost table column. Clicking the *Generate* and *download the report* button below the table creates and downloads the report.

5. **Multiple actions:** The rightmost column of each table includes icons that represent actions that employees can take on each item in the table. These include edit, search within the document, open, approve, download, and delete. Only those users who have rights to execute these actions see the related icons.

## DESIGN PROCESS

### Keep Users at the Center of the Process

When the bank's IT team begins to design a new intranet application, the IT Manager makes the rounds and talks directly to users. The goal of this exercise is to keep users at the center of the design process. New tools should improve users' work lives, so having their input is key. With this in mind, the application development process is a nearly continuous cycle of user involvement. The process steps include:

- Talk to employees
- Watch them work
- Write a project specification
- Meet with department head to verify specification
- Discuss the proposed solution internally, within the IT team
- Solicit department feedback
- Solicit team leader feedback
- Code
- Test
- Launch
- Conduct employee training
- Fix bugs

### Quality Communication Feeds Product Quality

The IT team takes an active approach to keeping the project momentum going as the platform continues to grow. Communication is key to keeping the quality of new applications high. Developers check in on projects and tasks every Friday; to help with this process, one of the intranet applications serves as a time management tracking tool. This application calculates each team member's progress toward project tasks and goes a step further by giving managers visibility into the progress of work done by all of their employees. The application is linked to the HelpDesk system where, based on service requests, the team determines how much time will be needed to process each request. This dashboard gives unit managers a view into what their employees are available to do, without any need to make additional phone calls. Twice daily, a progress report is downloaded from the system and sent to managers.

### Adoption/Buy-In

The greatest project hurdle the team encountered during the implementation process was

related to employee attitudes and reluctance to embrace change—so much so that, at launch, users rebelled against new system. This was a difficult challenge to overcome, but with time and consistent effort, the team has begun to see incremental improvements.

Once users engaged with the platform, they began to appreciate how the new system helps improve their work lives. Achieving even these incremental gains, however, was no easy win. Convincing users who may be stuck in the familiar rhythms of how work was once done that new systems are better is an uphill battle. It's never easy for users who once relied solely on phone calls and e-mails to complete a task to suddenly realize that they can now use online tools to accomplish the same tasks more easily. But the team worked hard to make those connections happen through trainings and one-on-one talks where they informed users about the benefits of the changes; slowly, users came around.

The intranet platform has grown from humble beginnings to become a powerful tool that brings together various areas of the bank's back office—it just took a while for everyone to realize and embrace that power.
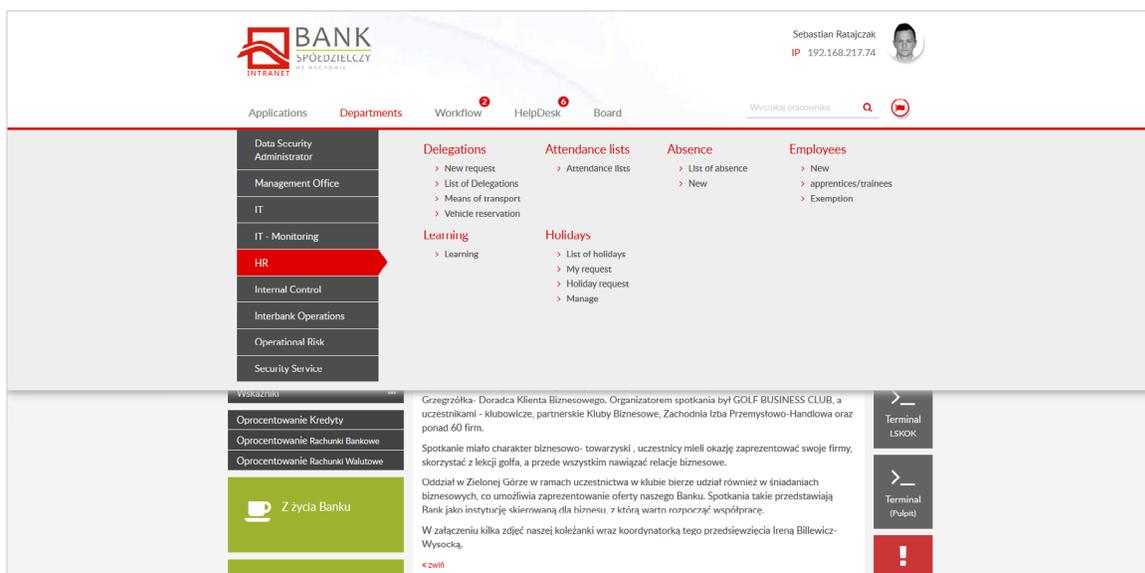


**Image 24. Bank Spółdzielczy we Wschowie Intranet Main Navigation.** This shows the intranet's main navigation menu with links organized by category. *BSWschowa_10_menu_live.png*

## GOVERNANCE

The bank's IT department owns the intranet, but that doesn't mean it operates in a vacuum. In this leadership role, IT team members are responsible for leading the thinking that drives how the platform grows and changes, and they do the development that brings those ideas to fruition. This means that they have to listen to business needs, so that the outcome of their work is an

intranet that helps improve work for every single employee.

Every three months, the bank's management is informed about any new functionality that will appear on the platform. The bank's central office participates in platform development by contributing in monthly meetings. Application ownership is sometimes a problem, but the IT team looks for compromises that can be created between the (sometimes differing) viewpoints of technology and business.

| Intranet Team Responsibilities | |
|---|---|
| **Role** | **Responsibilities** |
| IT Manager and Head Office Manager | Managers in the head office design solutions to improve the work of departments. They accomplish this through a process that includes defining the needs of users and building business diagrams.<br><br>• This work includes the following responsibilities:<br>• Search for new technology solutions<br>• Evaluate submitted projects<br>• Translate the business requirements into IT language<br>• Manage the project through completion<br>• Manage and maintain contacts with business leaders in the bank's head office<br>• Participate in trainings<br>• Design internal communication |
| Developer | • Select technologies<br>• Design application architecture<br>• Design front-end solutions<br>• Conduct code testing activities<br>• Design the intranet homepage and subpages<br>• Develop the open source community inside the company's IT department<br>• Conduct application testing<br>• Protect source code<br>• Manage portal function and application development<br>• Maintain the portal<br>• Maintain the platform and fix bugs<br>• Test application prior to transferring it to users |
| Administrator | • Test application prior to transferring it to users<br>• Oversee error reports<br>• Register incidents from IT systems |
| User | • Work with applications<br>• Create and publish intranet content<br>• Track which published content has been read |

**Image 25. Bank Spółdzielczy we Wschowie Intranet User Profile Admin Panel.** This is the administration panel where individual users can perform various actions such as changing their user data, resetting their passwords, or managing their roles. *BSWschowa_11_adminPanel_live.png*

**Image 26. Bank Spółdzielczy we Wschowie Intranet Employee Database.** The employee database application contains contact information for all employees.
*BSWschowa_12_employees_live.png*

## URL AND ACCESS

| Access Information | |
|---|---|
| Item | Status |
| URL | www.intranet.bswschowa.pl |
| Default Status | The intranet is set as the homepage in every user's browser; users cannot change this setting as it is controlled by Active Directory. |
| Remote Access | Users cannot access the intranet remotely. Administrators have remote access through VPN, and each remote session is automatically recorded so that the bank can monitor all remote access. |

## TIMELINE

| Project Milestones | |
|---|---|
| Milestone Date | Milestone Description |
| May 2005 | Idea for the creation of a new intranet |
| December 2005 | The first version of the intranet (for IT only) |
| 2007 | Add new team members to project following staff departures<br><br>Begin HelpDesk development |
| 2008 | Implement interior online shop<br><br>Create Document Circulation System<br><br>Add new developers to team |
| 2008–2013 | Construct 60% of the applications that appear on (current) intranet |
| October 2013 | Successfully measured first platform: Awarded "Highest Quality Intranet" by Business Forum in Dziennik Gazeta Prawna |
| 2014 | Add new developer team members following staff departures<br><br>Expand HelpDesk functionality<br><br>Launch intranet as a communication platform for bank employees |

| | |
|---|---|
| June 2014 | Award: "Support Leader 2014 Transformation" for Small Support Centers |
| 2014–2015 | Adapt intranet platform to Financial Supervisory Commission requirements |
| June 2015 | Award: "Leader in Information Technology of Financial Institutions 2014" by Gazeta Bankowa, Back Office Systems category<br><br>Construct the Electronic Version Change System |
| March 2016 | Award: finalist for Computerworld's "Best Cloud Solution" for development of HelpDesk and integration with Orange (VoIP telephony) |
| 2016 | Begin new intranet platform project |
| 2016–2017 | Redesign portal front end |
| April 2017 | Launch current intranet |
| June 2019 | Award: Step Two Australia's Silver Award for "Building a Custom Digital Ecosystem" |
| **Overall redesign timeframe:** 2 years | |

**Image 27. Bank Spółdzielczy we Wschowie Intranet HelpDesk.** This shows the dashboard view of the bank's HelpDesk ticket system.

*BSWschowa_13_helpdesk_live.png*

**Image 28. Bank Spółdzielczy we Wschowie Intranet HelpDesk Ticket View.**
The ticket view shows all information about the ticket and how the user manages
the ticket process. *BSWschowa_14_helpdeskTicket_live.png*

## CONTENT AND CONTENT CONTRIBUTORS

The life of every intranet depends on people; they are its strength. And there is no recipe to
manage content if no one wants to contribute it. On Bank Spółdzielczy we Wschowie's intranet,
every employee is empowered and encouraged to contribute content. For example, they can
contribute content to the homepage, add pictures to it, and decide which group of recipients will
receive it. Users are also given templates to manage their content contributions.

| Content Development and Oversight | |
|---|---|
| Contributors | All employees can publish their own content on the intranet. |
| Maintaining Quality | • Head Office departments ensure that published content is verified.<br><br>• All documents have a status, so document owners can transfer their out-of-date documents to the archive.<br><br>• The company's most important documents are related to business continuity and are stored in applications such as the Electronic Version Change System, Document Circulation System, and the file repository. All the documents in the repository are versioned and are subject to cyclical reviews to ensure that they're as current as possible. |

## TECHNOLOGY

| Technology | |
|---|---|
| Category | Technology Used |
| Web Server Hardware and Operating System | Hardware: IBM server farm, Hypervisor VMware ESX 6.5<br><br>Operating System: Linux Fedora<br><br>Backup Dell/EMC Avamar |
| Bug Tracking/Quality Assurance | Unit tests and functional tests performed by administrators<br><br>Bug report generated though a user form |
| Design Tools | Netbeans, Navicat, Git, GitLab |
| Site Building Tools | PHP7, Framework Symfony, HTML5, CSS, LESS, Bootstrap, jQuery |
| Content Management Tools | Custom management panel |
| Search | Custom search engine |

### Technology Approach

Building a custom intranet meant the sky was the limit for this IT team. Well, the sky and the budget and the team's access to specialists. But team members didn't let any of those limitations hold them back. Further, choosing an open source solution enables the development team to respond faster to an ever-changing business environment; this, in turn, means that it can respond faster to user needs.

The platform is built of independent modules that include a system of permissions. The aggregate outcome of this experience is a portal where employees are given specific instructions on where to find the tools they need to do the work they need to do. By developing this tool in-house, the company has now achieved a competitive advantage over many other banks in its industry. Thanks to this effort, Bank Spółdzielczy we Wschowie maintains its position as one of the largest cooperative banks in Poland.

## SEARCH

The bank's intranet doesn't have one main search. Currently, applications that store content have autonomous search engines and the team tries to match that level of detail depending on the business need. Search engines in applications are designed and made by the internal team, which doesn't use solutions from other suppliers.

Currently, the IT team is in talks to start working on a global search engine to service the entire portal.

## ROI

Although all of the benefits the bank has reaped from the launch of this intranet can't be counted, some of its benefits include the following:

- **Cost savings:** Using open source software and doing the work in-house translated into specific and measurable financial benefits for the organization. This approach meant it was not forced to buy commercial software, which is certainly not inexpensive at the enterprise level. This cost savings is also multiplied because, with a custom solution, there is no need to install additional software on individual workstations.

- **Data quality improvements:** These improvements are due to standardization, which has led to a decrease in the number of errors made by employees performing routine tasks that were once manual (and prone to error) and are now executed through the platform.

- **Benefits of a portal environment:** The portal environment provides employees with a digital workstation that gives them access to all necessary applications in one place and helps then perform their duties.

- **Intangible gains:** Some benefits are difficult to estimate, as is the case with the institutional knowledge gained through the development of a custom solution, which will pay off for years to come.
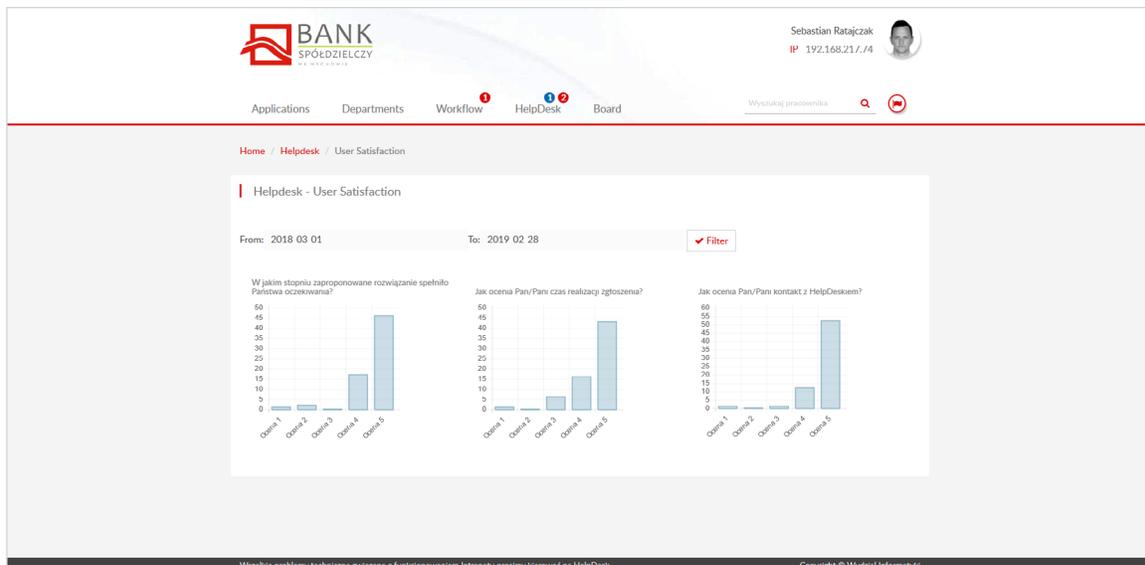
**Image 29. Bank Spółdzielczy we Wschowie Intranet HelpDesk Satisfaction Report.** This report from a HelpDesk user satisfaction survey illustrates how well the tool is serving employees' needs and shows a steady and rapid increase in satisfaction levels. *BSWschowa_15_helpdeskFeedback.png*

## LESSONS LEARNED

The bank's IT team shares some of the lessons learned in this technology undertaking:

- **Teamwork is what counts.** "We have learned that we are not alone, that teamwork is what counts. And we have learned to delegate tasks. We have gained knowledge on how to work on projects as well as how to test and document all changes. For the bank, the platform is primarily a tool that facilitates personnel management, business processes, and serves as an internal communication channel. Together this contributes to an essential aspect of the company culture: cooperation. It is one of the essential elements that has contributed to building a competitive advantage."

- **Pay meticulous attention to the requirements.** "While building the intranet, we were guided by good Information Technology Infrastructure Library (ITIL) best practices and our solutions were designed according to these. The intranet is a project we have been working on for several years and throughout that time we prepared a description of all the processes that we needed to implement, and then we systematically translated them into a digital form. At the beginning, we defined the idea behind the project and what it would provide, always keeping a focus on the customer, the user, and the owner of the service. Creating an accurate specification description of these elements has resulted in the most important outcome: providing the business with interesting and useful services."

- **Don't be afraid of change.** "There is only one conclusion from the entire transformation process: one should not be afraid of change. Openness to what surrounds us is what allows us to create things that simplify our functioning in the work environment. Even when building small units you can achieve a lot and thus contribute to the better financial results of your company."

- **Take the time to do it right—the first time.** "Many times we launched bad projects. The reason for this was because we were rushing, at the insistence of users. The users and business owner must define all aspects of the tool or project. They must define the parameters and those requirements can't be changed during development. If you break this rule, then you'll end up having to start over again when it fails and that's discouraging."

# Barclays

## OVERVIEW

### COMPANY

Barclays moves, lends, invests, and protects money for customers and clients worldwide.

**Headquarters:** Canary Wharf, London, UK

**Company locations:** Barclays has offices in the UK, North America, South America, China, India, Singapore, Japan, Holland, UAE, Germany, Switzerland, Luxembourg, Spain, France, Czech Republic, Sweden, and Israel.

Barclays also has branches in 50 countries.

**Locations where people use the intranet:** All locations

**Annual revenue:** $28.2B in 2018

### THE INTRANET

**Users:** All 80,000 Barclays employees use the intranet. Most colleagues visit daily.

The intranet is the entry point to all of Barclays' popular tools, and employees use the site and app to read news, collaborate with colleagues, use Phonebook (the colleague directory), manage tasks, view payslips, and so much more.

**Mobile approach:** iOS and Android apps

**Technology platform:** Custom built in-house

### PROJECT TEAM

At any one time, there were an average of approximately 35 people on the project team.

### CURRENT TEAM

**Leadership:** Donna Adams, Colleague Experience Director; Martin Pope, Head of Digital Design and Delivery; Hemal Borkhataria, Head of Innovation and Programme Execution; Nikhil Maheshwari, Development Lead

**UX design:** Lisa Adams, Suraj Naik

**UI design:** Anthony Clark, Kautuk Gajbi

**Development:** Pratibha Bhor, Akash Israni, Anil Lakhagoudar, Archana Meel, Ajay Nikam, Ankur Patel, Rakesh Tiwari, Darshita Vakharia, Ajay Bhatt, Sunit Banavalikar, Hardik Sodha, Aakash Udassi, Bipul Dev

**Systems architects:** Michael Lewis, Deron Blair, Sachin Pandey

**Testing:** Leena Shejekan, Suchitra Bajpai, Suraj Yadav

**Business analysts:** Rajendra Singh, Sourabh Patankar

**Project management:** Rachana Bhatia, Martin Peplow

**Scrum master:** Nitin Dubey

**Executive assistant:** Jenna Bristow

## INTRANET TEAM
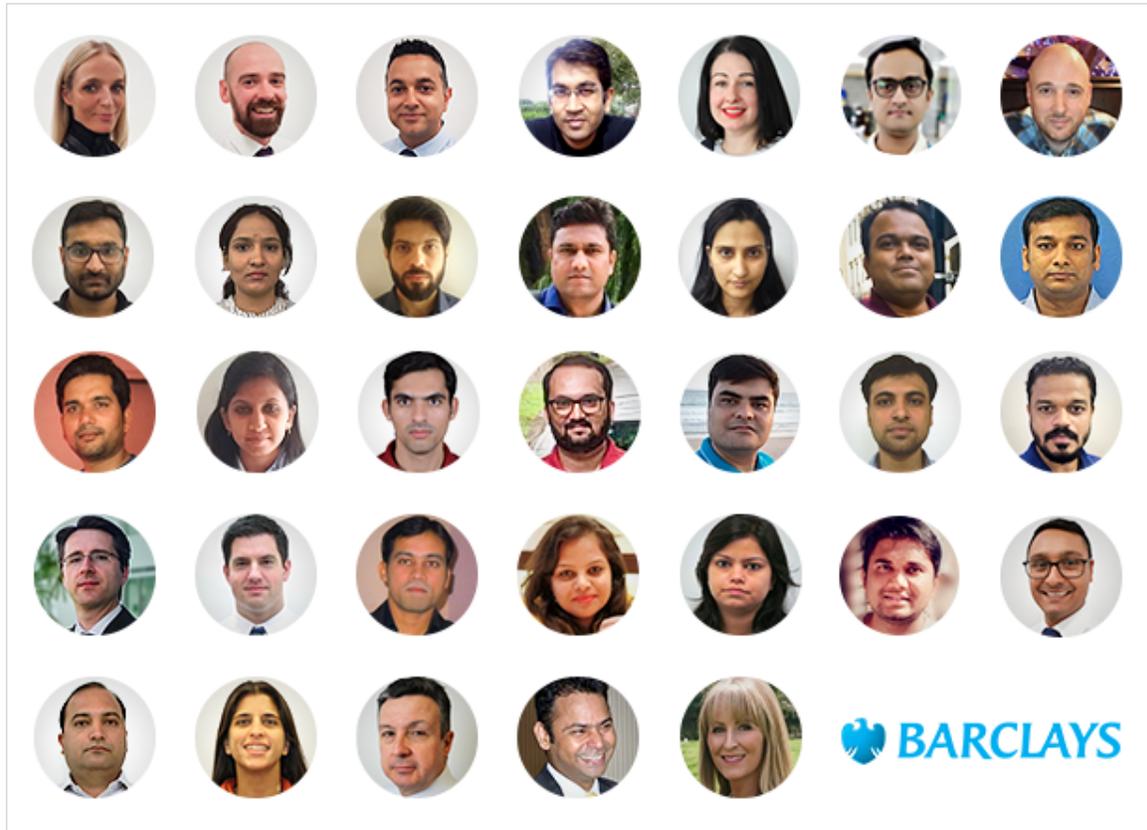


***Team members shown here*** *(row 1, left to right): Donna Adams, Martin Pope, Hemal Borkhataria, Nikhil Maheshwari, Lisa Adams, Suraj Naik, and Anthony Clark; (row 2, left to right): Kautuk Gajbi, Pratibha Bhor, Akash Israni, Anil Lakhagoudar, Archana Meel, Ajay Nikam, and Ankur Patel; (row 3, left to right): Rakesh Tiwari, Darshita Vakharia, Ajay Bhatt, Sunit Banavalikar, Hardik Sodha, Aakash Udassi, and Bipul Dev; (row 4, left to right): Michael Lewis, Deron Blair, Sachin Pandey, Leena Shejekan, Suchitra Bajpai, Suraj Yadav, and Rajendra Singh; (row 5, left to right): Sourabh Patankar, Rachana Bhatia, Martin Peplow, Nitin Dubey, and Jenna Bristow.*

## HIGHLIGHTS ABOUT THIS WINNER

Barclays Now, the intranet site for Barclays, deserves special recognition for its noble commitment to accessibility and ease of use, while still maintaining modern UI elements and staying true to branding and visual design goals.

- **Accessibility:** The team behind Barclays Now, called the *Digital Colleague Experience* (DCE) team, focused on accessibility in multiple ways, including designing, coding, and testing. At Barclays, accessibility is a high priority. The company has a dedicated in-house Accessibility team and three Accessibility Champions who liaise with that Accessibility

team to ensure compliance and best practices.

- **Easy access to tools and site links:** Users can quickly access apps and sites on the homepage of both the desktop site and mobile app. These links are added based on the user's business unit or the selected topics.

- **Pleasant, usable visual design:** The visual design of each page communicates a carefully considered hierarchy. Text size, color, whitespace, and section dividers make pages easy to scan. The most important information is displayed at the top of the page. Clickable items appear clickable, with strong signifiers such as bolded text or—gasp—underlined links. Barclays Now gracefully walks a line between minimalism and clarity. The mobile app visual design follows suit, with small amounts of information and minimalist design on each screen.

- **Targeted news:** News is curated so that employees see what's relevant to them, based on their role, location, and their own customizations.

- **To Do:** Each user's to-do list is easy to access and manage; this makes it more likely that users will see action items and stay current on procedures.

- **Collaboration tools:** Employees from around the world can participate in communities with colleagues who are like-minded—about work- or social-related topics—to communicate, help one another, and feel more connected. Finding communities is easy using recommendations and search features. Users can also collaborate via one-on-one instant messages and group chat. These tools on Barclays Now are especially helpful for employees who work in bank branches and do not have access to email.

- **Growing the intranet:** The DCE team included information on the intranet that describes its process and how stakeholders can work with the team to improve the intranet, add features and information, and drive traffic to their content. The simplicity of the information combined with the welcoming language and understandable steps surely coax interested colleagues to participate.

- **Simple global navigation:** The site's IA informs an understandable global navigation, with descriptive terms, obvious hierarchy, and intuitive visual selections.

- **Responsive design and a mobile app:** User research greatly informed the mobile app's design in terms of which content to include and how to present features. Creating the responsive website, in addition to the mobile app, was only partially motivated by the need to support mobile use; it was also driven by the needs of desktop users, who often have multiple side-by-side windows open simultaneously and thus also need the content to flow based on screen size.

# BACKGROUND

In 2016, Barclays' management team developed a four-point strategy for the organization. One of these strategy goals was to address "the rapid digitization of banking," as Barclays was shifting from being a traditional bank to a more digitized organization at that time. The banking industry as a whole was also developing more of an online presence as customers were increasingly doing their banking online. So, the DCE team was tasked with delivering an intranet and mobile app that were fit for the modern workforce and would better serve the needs of the bank's employees.

The initiative's goals for the intranet focused on six key areas:

- **Multichannel access:** make it available on desktop, mobile phones, and tablets.
- **Personalization:** give colleagues a unique view based on their individual role, team, and location.
- **Customization:** allow colleagues to change their view based on their own preferences.
- **Accessibility:** ensure that the site is designed, coded, and tested for accessibility by collaborating with the bank's internal Accessibility team.
- **Robustness:** ensure that desktop and mobile applications work with selected legacy, current, and new technology including iOS, Android, Chrome, and IE.
- **Research-driven:** inform design decisions with analytics and user feedback.

## Challenges

While the project goals were clearly defined, the accompanying challenges were also evident.

- **Technology restrictions:** Because Barclays is a bank, the technology is tightly restricted by security; as a result, the team often had no choice about which technologies and tools to use.
- **Geographically dispersed team:** The design team is located across London, in Knutsford in Cheshire, and also in India. Despite this distance, team members are in contact and work together every day through Scrum calls; they also use video conferencing to stay in touch.
- **Legacy systems and sites:** Barclays has many disconnected internal sites, and data comes in to Barclays Now from multiple sources and platforms. The DCE team therefore had to manage those integration points and accommodate the restrictions they entailed:
  - The team transferred or decommissioned more than 12,000 SharePoint sites on legacy systems and migrated UI components from SharePoint to a CMS to provide a single-page application.
  - Collaboration tools were integrated into Barclays Now with a new front-end design, with data coming from SharePoint.

- Barclays colleagues heavily use hundreds of tools and division-specific microsites. Previously, they had to both be aware these tools existed and know how to find them. Barclays Now solved this issue by organizing the tools on one landing page, categorizing them, and making them searchable. Further, colleagues can now mark tools as favorites; doing so also displays those tools as homepage widgets.

- **Time-poor test participants:** Usability testing was challenging as colleagues are busy and were not incentivized to participate. Some agreed to participate and accepted an appointment time, only to cancel at the last minute. Although happy and motivated to participate, many had higher priority things arise on the appointed day. In branches, another colleague could often substitute. In offices, the team found that it worked better to simply find available colleagues—such as in the canteen—and recruit them in real time.

**Image 30. Barclays' Previous Intranet Homepage.** On the old intranet, there was no real homepage; instead, users entered the site through the news page, which contained news and widgets. *Barclays_01_home_old.png*

## DESIGN REVIEW
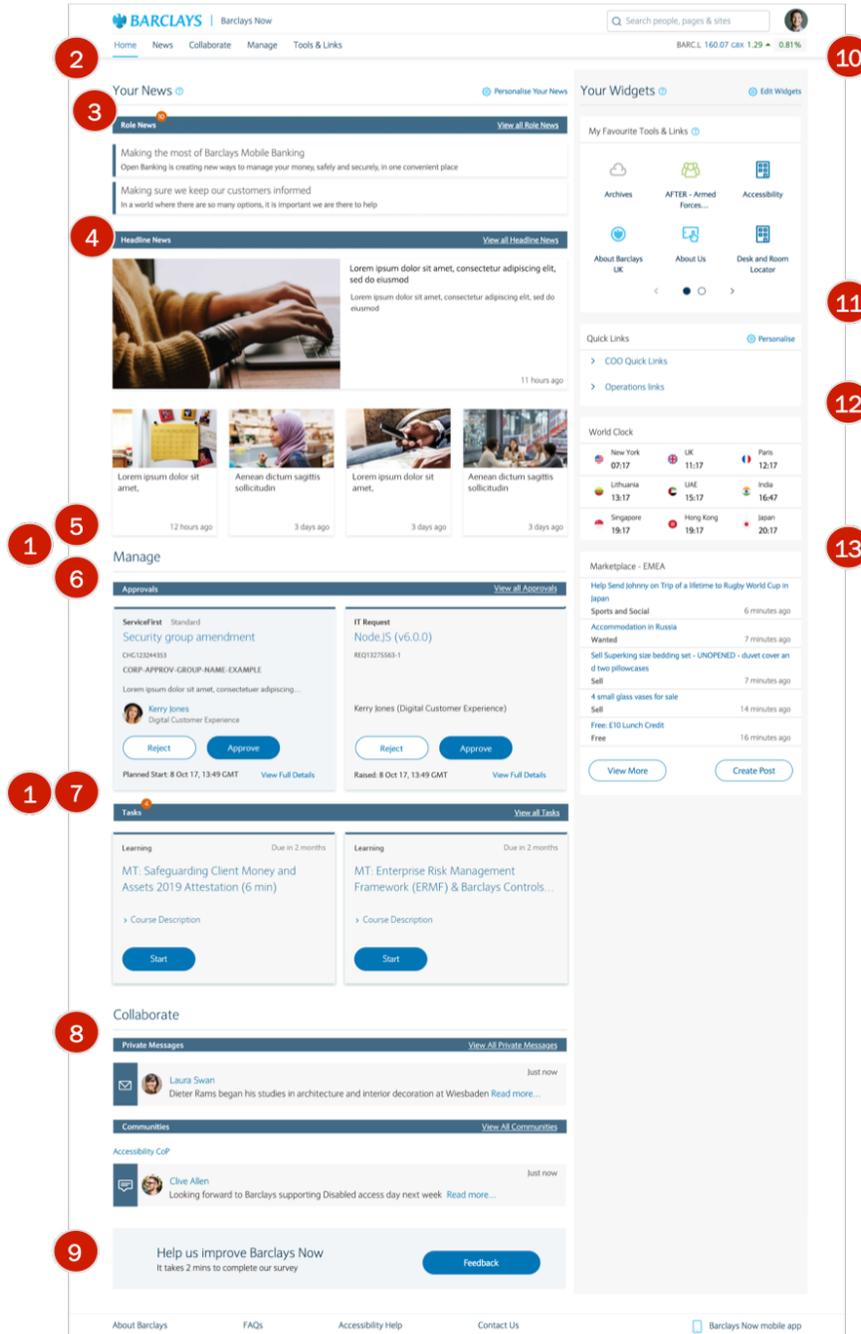
### Homepage



**Image 31. Barclays Intranet Homepage.** The Barclays Now homepage is divided into four main parts: news, information and tasks, collaboration, and links to tool and apps. *Barclays_02_home_live.png*

## Homepage Highlights

The team divided the intranet homepage into a few manageable sections related to news, managing tasks, collaboration, and links to important tools. This uncluttered layout makes the page handy for employees and easy to use.

Various types of news targeted to the user starts off the experience, followed by task support, apps and website links, and other helpful elements.

Tools and links help people do their job. On Barclays Now, the tool and links are alphabetized, categorized, and searchable. Once found, users can mark a page as a favorite, which displays it on the homepage.

One of the DCE team's goals was to increase employee productivity. Making it possible to speedily access all of these key resources from the homepage is certainly one way to help meet that goal.

1.  **Page hierarchy:** The use of varying text sizes, teal section dividers, and white space make it easy for employees to scan and decipher content sections.

2.  **News:** The Corporate Communications team keeps a steady flow of news coming, so employees are well informed about happenings at the organization and in the industry. The news is a mix of selections based on the logged-in user's role, location, and user-selected topics. The large *Your News* section heading in the upper left of the homepage specifies that the news is targeted to the logged-in user.

3.  **Targeted news:** The *Role News* section appears for users who have news that is specifically written for their role. An orange circle with a number in the section header communicates when new, unread items are posted and how many there are. This also matches the orange dot indicator in the *Role News* global navigation link under *News*. The *View all Role News* link leads to a larger list of items and reiterates the fact that the news is role-based.

4.  **Headlines:** The *Headline News* section contains a selection of items curated from the vast body of news specifically for the logged-in user based on his or her role and location. Legible headlines and related images make the news easy to scan.

5.  **Manage:** The *Manage* section toward the bottom of the page includes elements related to approvals and tasks.

6.  **Approvals:** The *Approvals* cards display elements the user needs to tend to. The most necessary information, such as the topic, what it relates to, and the contact person, are visible. Large buttons on the homepage for *Reject* and *Approve* enable employees to act immediately. If they need more information before proceeding, the *View Full Details* link is just the ticket.

7. **Tasks:** The *Tasks* section includes information about mandatory training, usually related to legal, risk, and compliance issues. Given the gravity of the training, it's highly important that the right bank employees are aware of the training and take it, and that the bank tracks the training. The cards make all of this possible, with the course name, due date, link to a description, and a clear blue *Start* button.

8. **Social:** The *Collaborate* section shows both private Barclays-internal social messages, as well as notifications from communities to which the user is subscribed.

9. **Feedback:** The *Help us improve Barclays Now* section at the bottom of the page links to a survey about *Barclays Now*. Several elements make this a good survey advertisement:

   - The visible position of the call for participation
   - The plea for help (albeit not a desperate-sounding one) that implies that all employees can be of assistance
   - The expectation that it will take only two minutes
   - The button to take action and begin the questionnaire

10. **Tools and selected links:** The *Your Widgets* in the right rail includes items that the user selected to see on the homepage. Users can edit this list via the *Edit Widgets* link (with gear icon) in the upper right of the section. This area makes it easy for employees to find and use tools they need without having to go through the navigation or search. The first section, *My Favourite Tools & Links*, links to microsites that users have selected as their favorites. These apps, which were developed by various business areas or third parties, include items such as pay slips, phonebook, and travel expenses.

11. **Business area links:** The links in the *Quick Links* section are automatically added based on the logged-in user's business unit, though users can also customize this list though the Personalise link (with gear icon). This area gives employees easy access to documents and other deep links on various sites.

12. **World clock:** Barclays employees work in 50 countries, and their work patterns are diverse. A *World Clock* section on the homepage helps employees know the current time at a colleague or customer location. The city name, country flag, and time are listed clearly in a small, easy-to-consult table.

13. **Classifieds:** The *Marketplace* section displays items for sale and other posts from coworkers. This section offers a much-loved place for people to buy and sell goods from a trusted source. The *View More* button leads to a larger list of items in the marketplace, while the *Create Post* button enables users to add a listing right from the homepage.

## Personalizing News
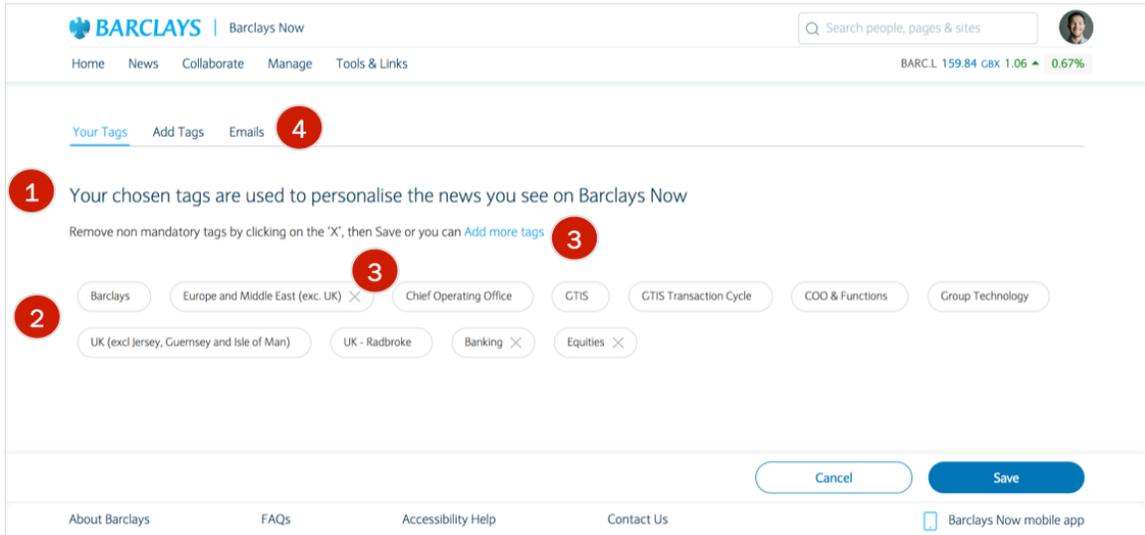


**Image 32. Barclays Intranet Personalizing News.** Users can choose topics for the email newsletters they receive, as well as for the news on the homepage.
*Barclays_03_personalise_ news_live.png*

## Personalizing News Highlights

With little effort, employees can be apprised of information that's pertinent to them. Homepage news and email newsletters are targeted to individual users based on tags they have selected.

1. **Summary:** The text at the top of the page—*Your chosen tags are used to personalize the news you see on Barclays Now*—informs users about what the tags do. Designers don't take for granted that users can guess this, which is a sign of a vigilant design team.

2. **List:** The set of assigned tags appears in a horizontal list.

3. **Add or remove:** Users can click the *x* to the right of the tag button to remove the tag. The blue *Add more tags* link makes it easy for people to add more news topics that they are interested in.

4. **Email tags:** Barclays employees receive news via email newsletters. They can choose newsletter topics that they are interested in through the *Emails* link.

# Role News and To-Do Items
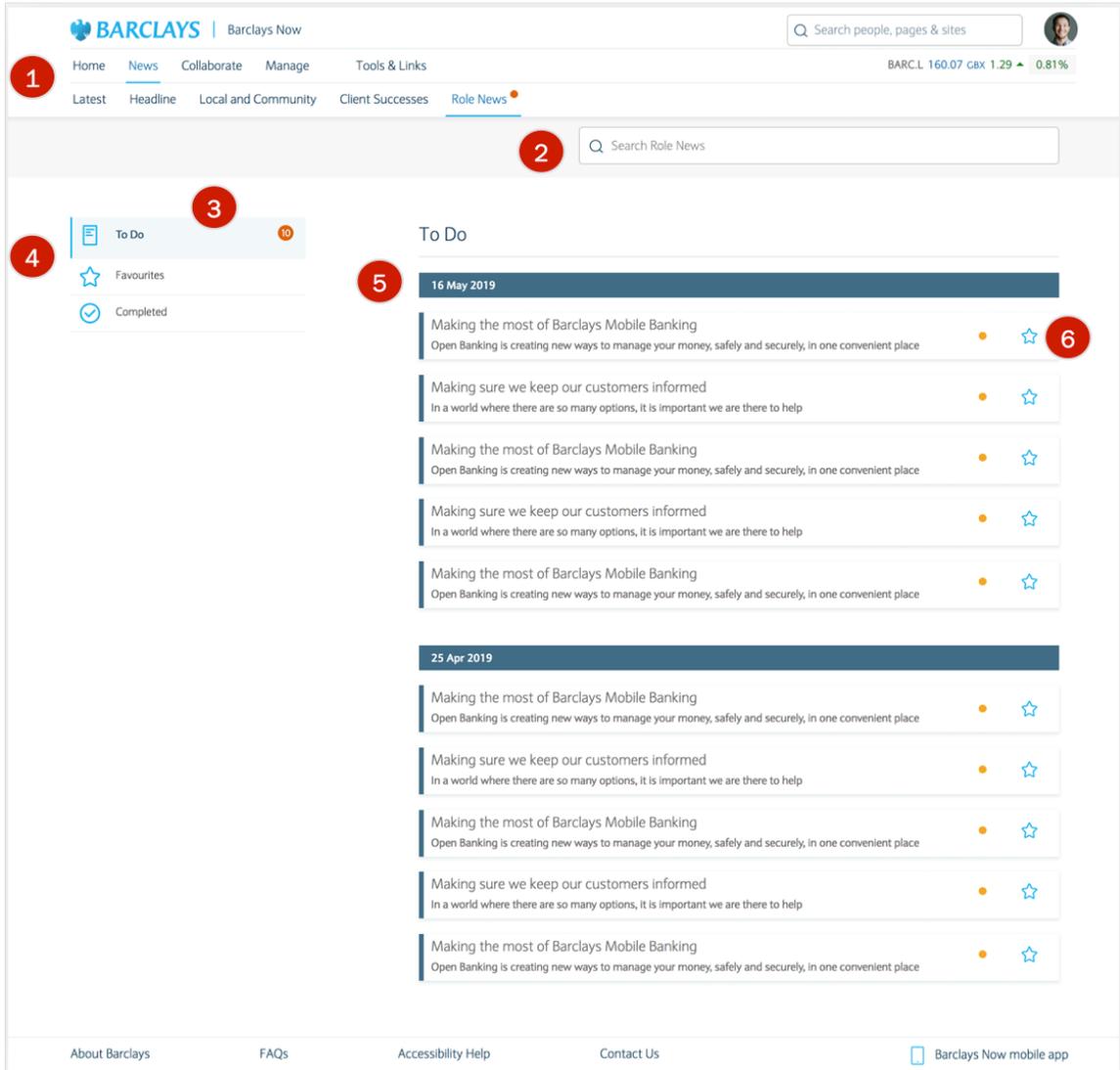


**Image 33. Barclays Intranet News and Tasks.** The news and tasks employees need to read are consolidated in one area and can be sorted by whether or not the user has yet attended to them.

*Barclays_04_role_news_old_vs_live_cropped_new_only.png*

## Role News and To-Do Items Highlights

Based on their role, users see news updates that are targeted to them in the intranet's *Role News* area. Although these are news items, reading them is mandatory and user research revealed that users think of them more as tasks than news. Branch colleagues are the main audience for role news. This content is helpful and important to them for two reasons: 1) the content—including changes to products and processes, fraud alerts, security warnings, and interest rates—offers information users need to know about and act upon; and 2) the presentation medium—the intranet—is crucial because some branch employees do not have access to email.

1.  **Menu section:** Horizontal navigation makes it easy for users to know where they are on Barclays Now. The top-level menu item, *News*, appears selected because of the color change and blue underline. The secondary menu uses the same visual treatment to indicate which item is selected. An orange dot appears to the right of the *Role News* menu link, matching the orange dot used to indicate unread items on the list in the page. This consistency can help employees recognize when they have new items to attend to.

2.  **Search:** A scoped search feature makes it possible to look for only targeted news. The search field's placement within the page (not in the header, like the global site search) and the prompt, *Search Role News*, both attempt to convey to users that they can search (or are searching) within only the *Role News* section.

3.  **Select by status:** Employees can view items according to their status using the links on the left. The selected area is clearly marked with the light grey background and a blue vertical bar to the left of the label. For additional clarity, the page title matches the left-side label and appears in large blue text. The number of unread items appears to the right of the *To Do* link in an orange circle, matching the orange dot used to indicate unread items on the list in the page.

4.  **Status:** Users can track their status and mark items as finished by reading the news item. Read items move from the *To Do* view (link on the left) to the *Completed* view.

5.  **Date:** Items are organized by date, with the most recent toward the top of the page. Dates display at the top of their sections and are written in international format, starting with the day, followed by the month name written out and the year as a four-digit number. This eliminates possible confusion about the day, month, or year.

6.  **Bookmark:** Items that users want longer-term access to can be bookmarked by clicking the star icon to the right of the item. This moves the item to the *Favourites* section, where people can find the items easily.

## Mobile
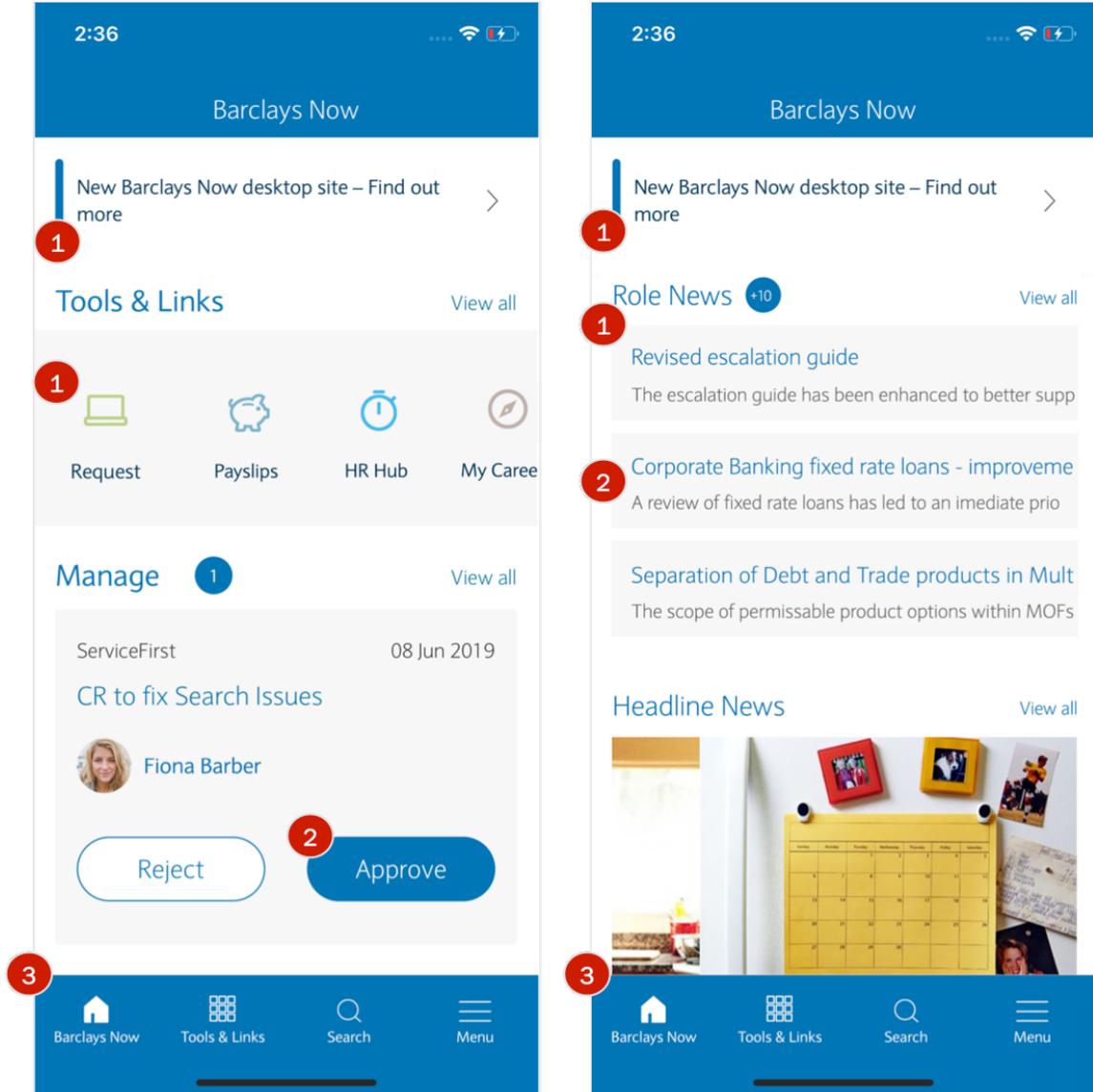


**Image 34. Barclays Intranet Mobile Homepage.** In the mobile app, important elements appear toward the top of the screen. If users have news based on their roles on the homepage in the desktop view, those news items show up first on the mobile homepage (as in the screen on the left). If users don't have role-based news, other important elements—such as *Tools & Links*— show up first on mobile (as in the screen on the right). *Barclays_05a_mobile_home_version1.png* and *Barclays_05b_mobile_home_live.png*

## Mobile Highlights

Many of Barclays' 80,000 employees work in multiple locations or travel for their jobs, which means accessing Barclays Now on a mobile device is not only convenient, it's necessary for good productivity.

The team designed the mobile app based on research findings about employees' tasks, mobility, and mobile use. Thus, logged-in users see their content sections in the app with the most important ones first. The mobile app also lets users search for tools developed by the digital team and any other mobile-optimized tools that are part of Barclays' digital workplace. This makes it possible for employees to be productive and stay informed no matter where they are—even if they only have their phone.

Going above and beyond to make Barclays employees' work as frictionless as possible, the design team also created Barclays Now as a responsive website. Not only does this help users on mobile devices, but it also helps colleagues on the desktop. The team's research revealed that many users work on desktop with one computer monitor and multiple windows open side-by-side. For example, they may use one window for a reference document and another open to the application in which they need to enter information.

1.  **Flow:** The most important news items appear at the top of the screen, with logic and weighting based on a combination of recency and importance. The article then displays to audiences based on their role and location.

2.  **Large buttons and links with adequate padding:** Links and buttons are all large enough to read and tap. The size and space between the adjacent tappable elements make the intranet easy to navigate on mobile, as well as on laptops with touchscreens.

3.  **Navigation:** As with many mobile apps, Barclays' designers placed the navigation at the bottom of the screen. With this placement, desired content appears toward the top, while keeping the needed items—such as the search icon and link to home—within a thumb's reach.

## Group Chat
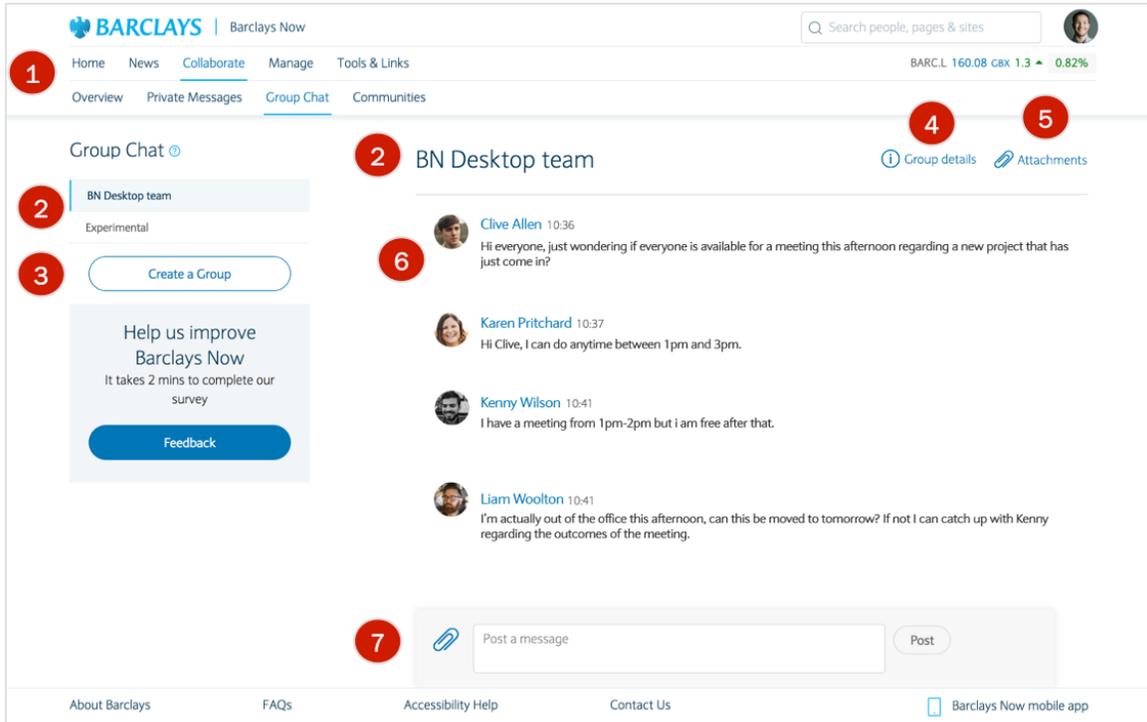


**Image 35. Barclays Intranet Group Chat.** Employees can initiate and participate in group chats with their colleagues. *Barclays_06_group_chat_live.png*

## Group Chat Highlights

In addition to private one-to-one instant messages, employees can participate in group chats. Each of these channels is secure and thus safe to use to discuss informal issues or formal, confidential work; in contrast, a third-party chat tool would be blocked by the bank's security. Like communities, these features are especially helpful for frontline employees—such as bank branch employees—who do not have email access. The group chats make it easy to connect with others, since employees can use either their personal mobile devices or a Barclays-issued one, and the system sends them notifications about group chats to which they are members.

Anyone can create a group chat—for a project team or any other closed group—by inviting members to the chat room. Group chats are by invitation only. Once accepted, members can share information, files, and links.

1. **Menu section and page title:** The top-level menu item, *Collaborate*, appears selected and displays related features, including *Private Messages* and *Communities*. The large page title, *Group Chat*, in the upper left confirms to users where they are.

2. **Chat rooms:** Each chat room to which the user is a member appears in a list on the left. The selected one has a grey background and blue vertical line; the name appears at the top of the content area.

3. **New group:** The large *Create a Group* button on the left is a great way to advertise that anyone can initiate a chat.

4. **Details about the group:** The *Group details* link in the upper right links to a page that describes the group's purpose and lists its members.

5. **Attachments:** The *Attachments* link in the upper right leads to a page that lists each attachment that has been added in the group chat. Thus, rather than having to scroll through all the messages, employees can easily locate files and other collateral that was shared in the chat.

6. **Chats:** Each chat item includes the name of the person who wrote it, his or her photo, the time of day, and the text of the chat itself. Clicking on the colleague's name opens a mini-profile pop-up to avoid taking the user off track. All of these features help employees stay connected with one another.

7. **Post:** The field at the bottom of the chats list—which is organized with the oldest chat at the top and most recent chat just above the field to post—suggests users *Post a message*. This short sentence is a good way to publicize the feature. The field size indicates that a few sentences would be just the right amount of text for a chat. Users can also add an attachment if they have more information to share in a file. The paper-clip icon is standard to indicate attachments, and is reinforced with the label in the upper right of the page.

# Communities
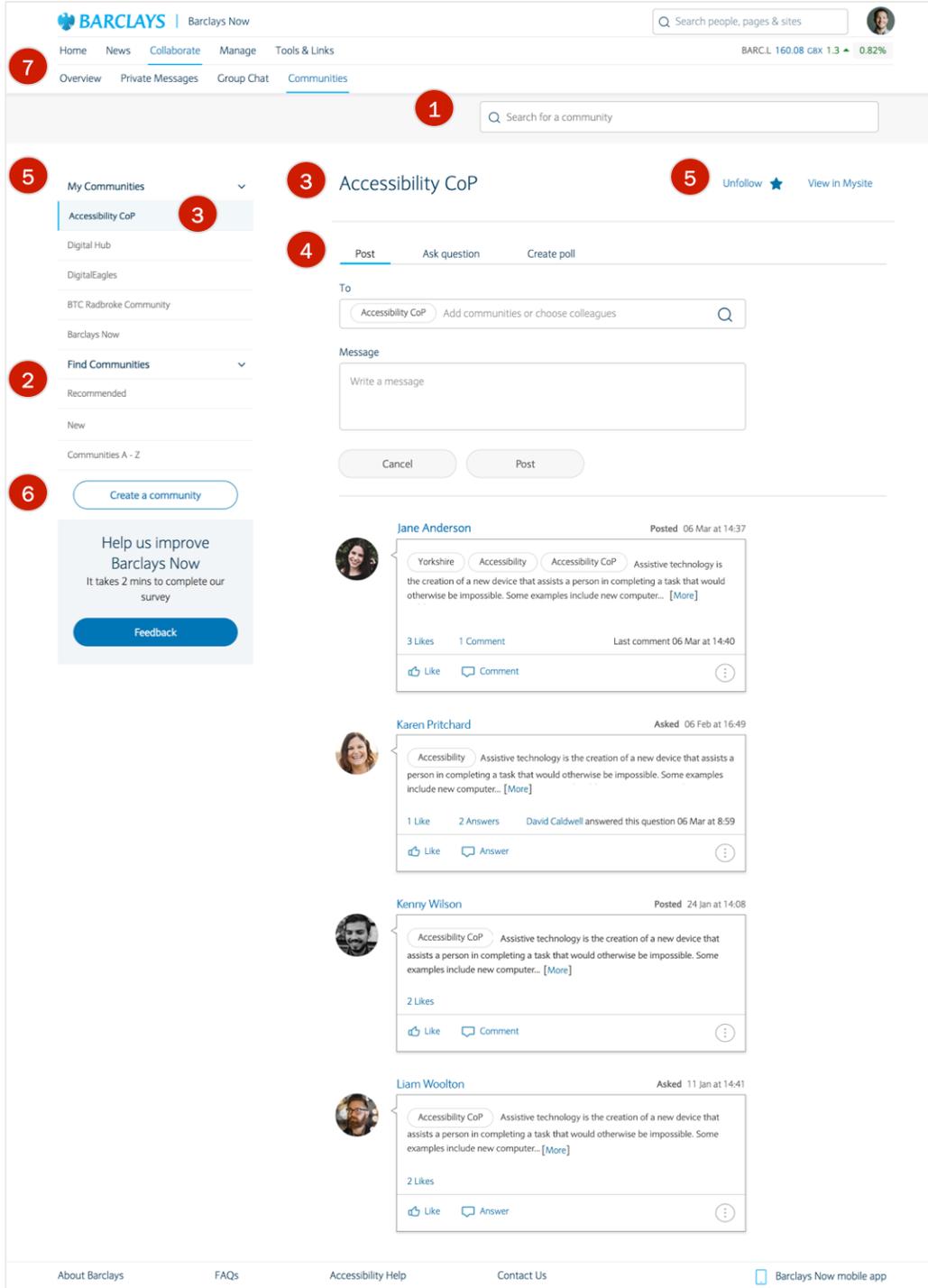


**Image 36. Barclays Intranet Communities.** Employees can access the communities to which they belong or can browse or search to find new communities to join. *Barclays_07_communities_live.png*

## Communities Highlights

Barclays Now offers communities that let employees from all locations discuss work-related or social topics in which they have a shared interest. Communities are accessible from the homepage via the *View All Communities* link and the *Collaborate* global navigation menu link.

1.  **Search:** Users with a topic in mind can search the body of communities.

2.  **Browse:** The *Find Communities* section of the left-side navigation enables users to browse the communities in various ways, including *Recommended, New*, and *Communities A-Z*. These are helpful and provide different options to help users see what they might be interested in.

3.  **Current:** The currently selected community is easy to decipher with the link's grey background in the left-side navigation. The community's title also appears in large letters at the top of the page.

4.  **Interact:** The top, horizontal links allow users to *Post, Ask question*, or *Create poll*. When writing a message, users can post in the To field not only in the current community, but also in additional communities. This makes it easy for people to share knowledge with other groups that might be interested in a post. Users can like and comment on posts, and the number of likes and posts is listed at the bottom of each post.

5.  **Subscribed:** The list of communities the user follows appears in the *My Communities* section of the left-side navigation. To unsubscribe, users open the community and click the *Unfollow* link in the upper right.

6.  **Create:** If they can't find a community they want, users can set up a new community via the *Create a community* button.

7.  **Menu section:** The top-level menu item, *Collaborate*, appears selected because of the color change and blue underline. The secondary menu uses the same visual treatment to indicate which item is selected.

## Mobile App Collaboration Tools
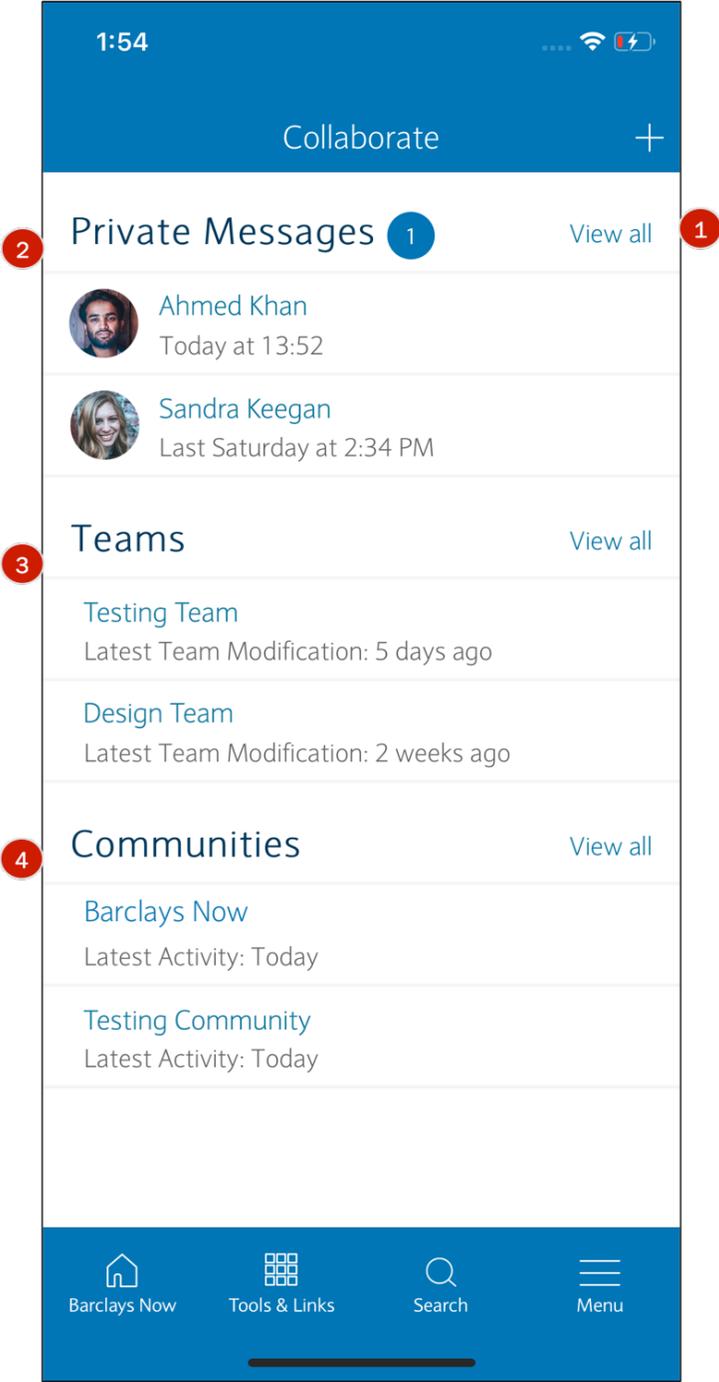


**Image 37. Barclays Intranet Mobile Collaboration Tools.** The two most recent items from each collaboration tool appear on the main *Collaboration* page. The *View all* link allows users to see the rest of each type of collaboration event.
*Barclays_08_mobile_collaborate_landing.png*

## Mobile App Collaboration Tools Highlights

As with the desktop view, employees can stay in touch with their colleagues and project teams using the mobile app's collaboration tools—participating in communities and group discussions, and sending and receiving private chat messages—wherever they may be.

1. **Sparse design to updates:** Rather than jamming the screen full of information, the team opted to provide minimal, yet important, information about the latest updates to each collaboration area. The *View all* link that leads to more details is just a tap away.

2. **Private messages:** Employees can see the most recent private messages at the top of the *Collaborate* main page in the mobile app. The message shows the sender's name and photo, and the message date and time. Users can also click the *View All* link to see the rest of their messages. A blue notification bubble with the number of new chats appears at the top.

3. **Project teams:** The two most recent project team messages show the team name and when that last update was made.

4. **Communities:** The name of the community and the day of the latest activity are displayed.

## Mobile App Tools
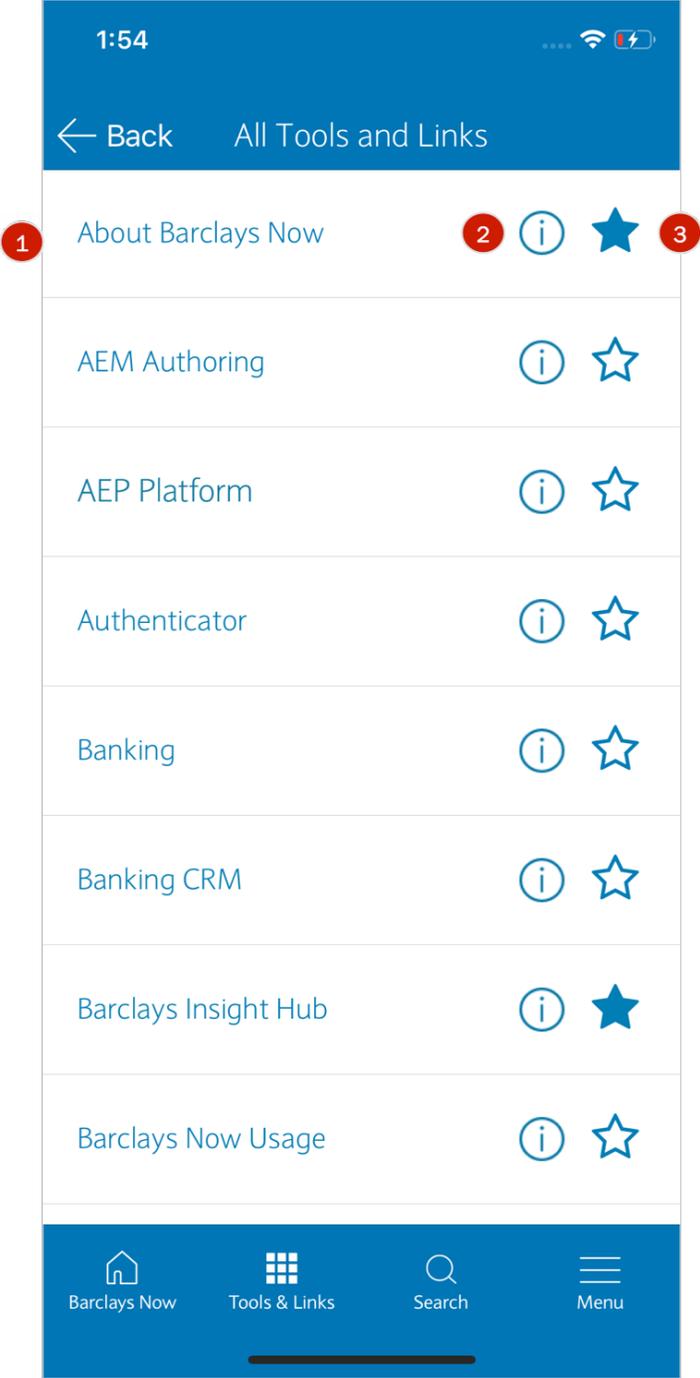


**Image 38. Barclays Intranet Mobile Tools.** All mobile-optimized apps are easy to access and favorite in the mobile app.
*Barclays_09_mobile_tools_links_live.png*

## Mobile Apps Tools Highlights

Trying to locate a tool in the vast set available at Barclays could be daunting, especially on mobile. But designers made this task a cinch with the mobile app's *All Tools and Links* section, which consolidates all mobile-optimized tools.

1. **Link:** Links to apps are listed in alphabetical order. This gives users access not only to their favorite apps, but also to all mobile-optimized apps. This makes more work possible on mobile.

2. **Information:** Tapping the i icon displays a description of the tool and its purpose.

3. **Favorite:** Once users know an app is valuable to them, they can make it even easier to access: Tapping the star icon adds the link to the tool to the user's list of favorites, and displays the link on the app's home screen.

## Intranet Team Service



**Image 39. Barclays Intranet Work With Us Page.** The *Work with us* page describes how stakeholders can include their content on Barclays Now—and why they should. *Barclays_10_work_with_us_live.png*

## Intranet Team Service Highlights

To help and encourage employees to have an intranet presence, the Barclays Now DCE team created a *Work with us* campaign page in the *About Barclays Now* section. The page conveys to stakeholders the benefits of including their content on Barclays Now, what to expect from working with the team, and who to contact.

1. **Description:** Two short paragraphs explain that employees will work with the digital team to get their content on the intranet. The *Work with us* subheading is welcoming and encouraging.

2. **Case study:** A mini-case study includes a quote about why one team wanted to put its content on the intranet. This is a good way to further encourage people who might want to put their content on Barclays Now.

3. **Benefits:** A modest visual describes three key benefits of including content on the intranet: it works well on mobile, it is always improving, and it is accessibility and security compliant. Outlining the benefits so succinctly can help encourage employees to contribute content.

4. **Preview:** The *How we work* section previews the team's process for design projects. An image describes the general phases—*learn, create, and measure*—so possible internal clients get an idea about how a project might go. This kind of preview can help a project run more smoothly, as it sets the stage even before the teams begin to work together.

5. **Initiation:** A set of six numbered steps offers details about the project initiation process; once again, the team had the forethought to communicate well, which starts projects off right.

6. **Contact:** People ready to initiate a project or discuss it can click the *Find out more* button to get in touch with the team. Employees can also give any ideas for improving the intranet via the *Feedback* button.

## DESIGN PROCESS AND USABILITY WORK

### A User-Centered Approach

The design team's activities included a variety of research methods, but it was driven by a single goal: to focus on the users. Team members researched the needs of the user population to ensure their needs were met; this resulted in an intranet that is, in their words, "performant, mobile, accessible, and personalized." This was accomplished in several ways.

- **Personas:** The team interviewed colleagues representing a mix of geographies, business units, and lengths of experience at Barclays. This led to five personas.

    - **The differentiating factors were:** what the job involves (typical everyday tasks); which tasks could be made mobile; how Barclays Now could be a game changer; *About me* (applicable business units, length of service, work environment, tech usage, tech savvy); highest and lowest priority tools; and biggest challenges.

    - **The needs that emerged were:** keeping track of all the different systems; having simple processes, clear navigation, and easy-to-find tools; making approvals mobile (so that managers and PAs can sign off requests); having mobile collaboration tools; bringing all systems under one umbrella; having customization options; receiving timely notifications for tasks; needing only one password.

- **Task identification:** The persona research helped to create a picture of the types of tasks colleagues do and their needs, goals, roadblocks, and challenges.

- **Design concepts:** With a solid understanding of the user types and their work environment and tasks, team members started to create design concepts and conducted iterative usability tests so that they could learn from colleagues before refining and re-testing.

- **Guerrilla testing:** The team also carried out guerrilla testing in the staff restaurant, which helped it recruit a higher number of test participants. There were dropouts from the planned sessions, not due to reluctance, but rather because the participants had had last-minute things come up that were higher priority. Given this reality, guerrilla testing was key to finding enough colleagues who were available to participate. Team members set up a table in the restaurant and put up signs to help lure colleagues over to chat so they could be recruited. This simple approach worked well. The team was able to get more participants in this way than with the planned sessions—in one day, the team typically recruited around 20 participants over three hours compared to six planned meetings in a day.

- **Agile development sprints:** After the leadership team signed off on the design, the UX team began conducting Agile development sprints using detailed wireframes that illustrated the UI design. The guerrilla test sprints continued for two weeks while the team continued to iterate the design and test new features.

## Post-Launch: The Focus on Users Continues

The team continues to collect user feedback post-launch through feedback buttons placed throughout the site. Various DCE team members periodically review feedback and respond to colleagues who have questions or complaints. This feedback leads to research, investigation, fixes, and the development of new tools and features.

This simple tool has already yielded high engagement from users. For example, as a result of feedback, the team made the following changes:

- Added a reset button for unread role news (to do) to make the number go back to zero
- Added missing tools
- Gained testing volunteers, including recruiting a panel of test participants who use assistive technologies
- Fixed bugs
- Fed comments on content or tool usability back to other teams

## Designing the Homepage and News

Previously, Barclays Now didn't really have a homepage. The landing page was simply populated with news. In the redesign's discovery phase, the team conducted interviews to research colleagues' tasks, work patterns, task requirements, and pain points. The findings from these interviews influenced the creation of the new homepage design.

Now, when users open a browser, the Barclays Now homepage loads. Because the Barclays workforce has such diverse roles and works from so many locations, this homepage had to be personalized and customizable. The new homepage is thus more like a dashboard, personalized to each colleague by role and location. It shows their top news headlines, tasks due to be completed, favorite tools, chat notifications, and any other widgets users add on their own.

Because the homepage was no longer solely dedicated to news, the news needed a home. It became one of the pillars that constitute the site's verticals: *News*, *Collaborate*, *Manage*, and *Tools & Links*.

News has five sublevels: *Latest*, *Headline*, *Local and Community*, *Client Successes*, and *Role News*. These sections existed previously; the main change was in the IA. On the old site, all of these sections were homepage content with links that led to landing pages. Now, only the highest priority and most relevant headline news stories are featured on the homepage and all sublevels are accessed via the global navigation menu.

In early design concepts for the smart homepage, the team gave different amounts of real estate to the various pillars. The current solution solves this by displaying content depending

on the user's selections and activity—such as whether they have new messages or tasks pending, which widgets they have chosen, and personalized news and links. The screens below show how the team worked through various design approaches over time.
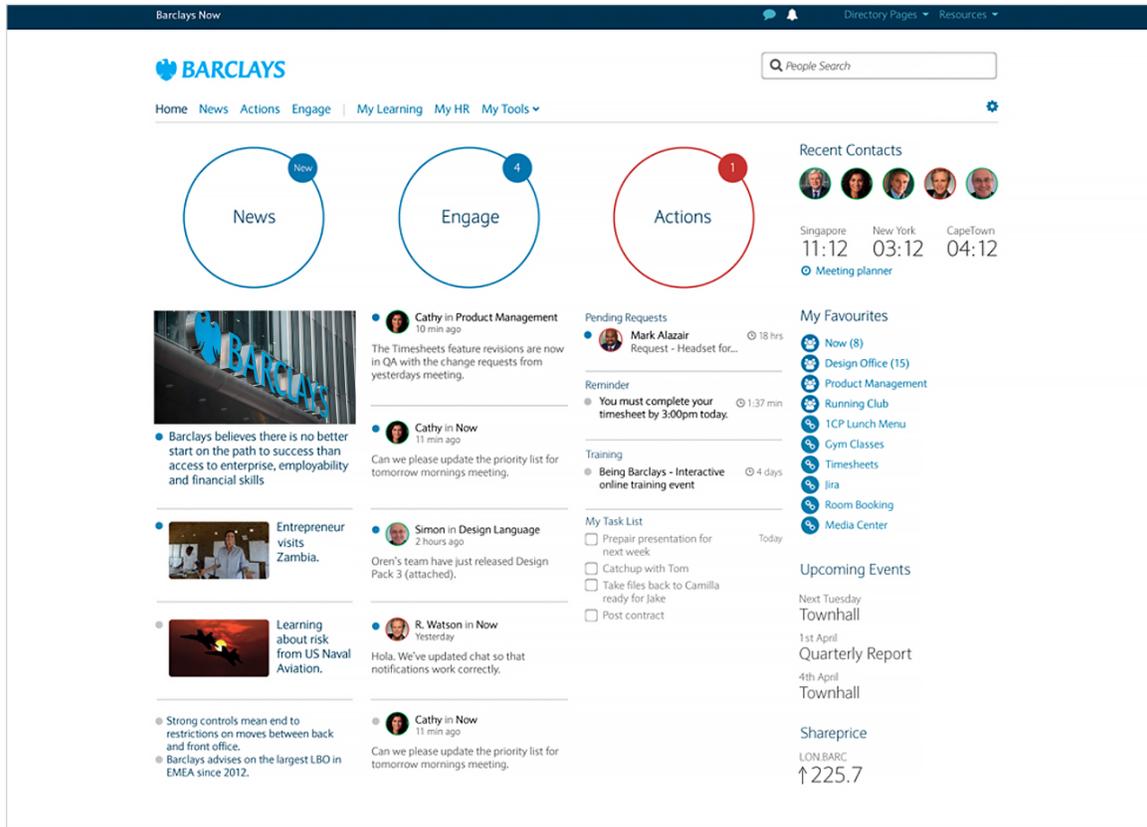


**Image 40. Barclays Intranet Design Process.** The homepage design concept with four columns: *News*, *Engage* (which later became, *Collaborate*), *Actions* (which later became *Manage*), and *Widgets*. This concept was designed before the decision was made to make the site responsive and after the mobile app launched. It borrowed the circles from the previous mobile site design to provide a feeling of consistency and continuity between the two sites.
*Barclays_11_home_concept1.png*
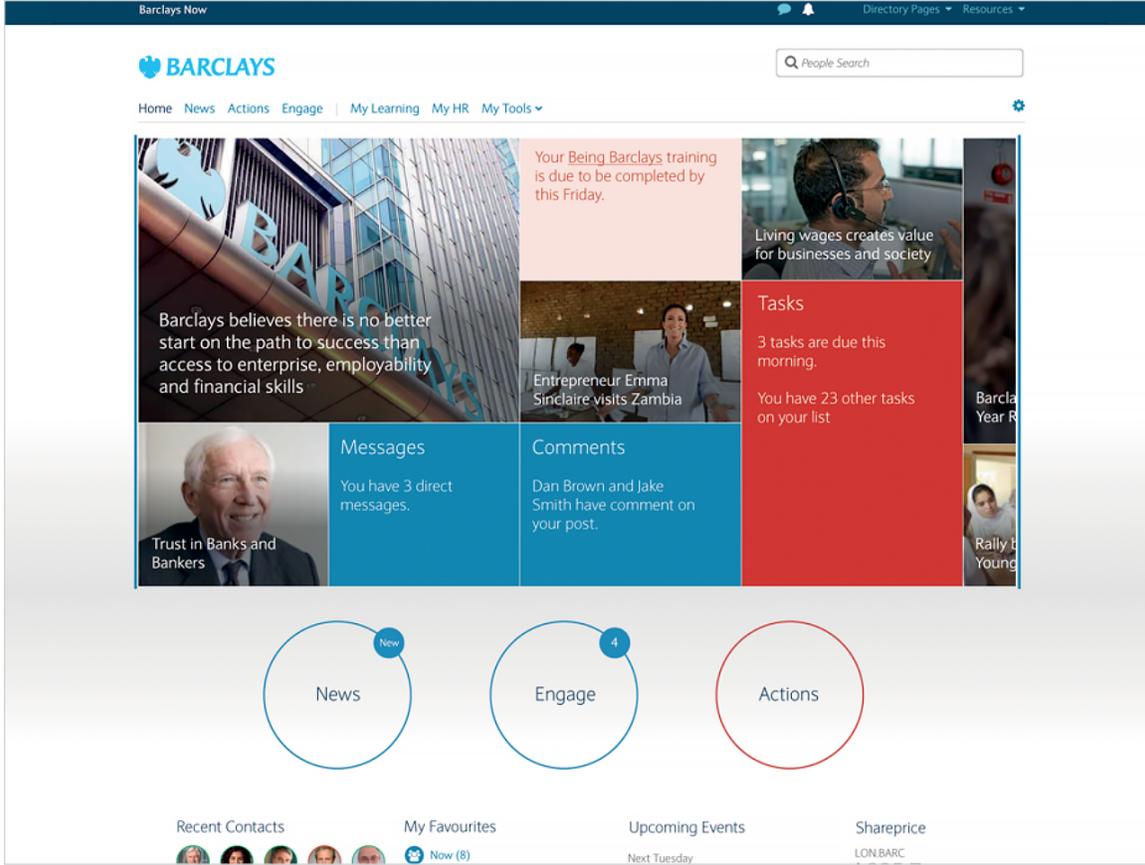
**Image 41. Barclays Intranet Design Process.** Design concept with modular display for some of the smart homepage features. The *News*, *Engage*, and *Actions* pillars sit below, together with a widgets sidebar.
*Barclays_12_home_concept2.png*
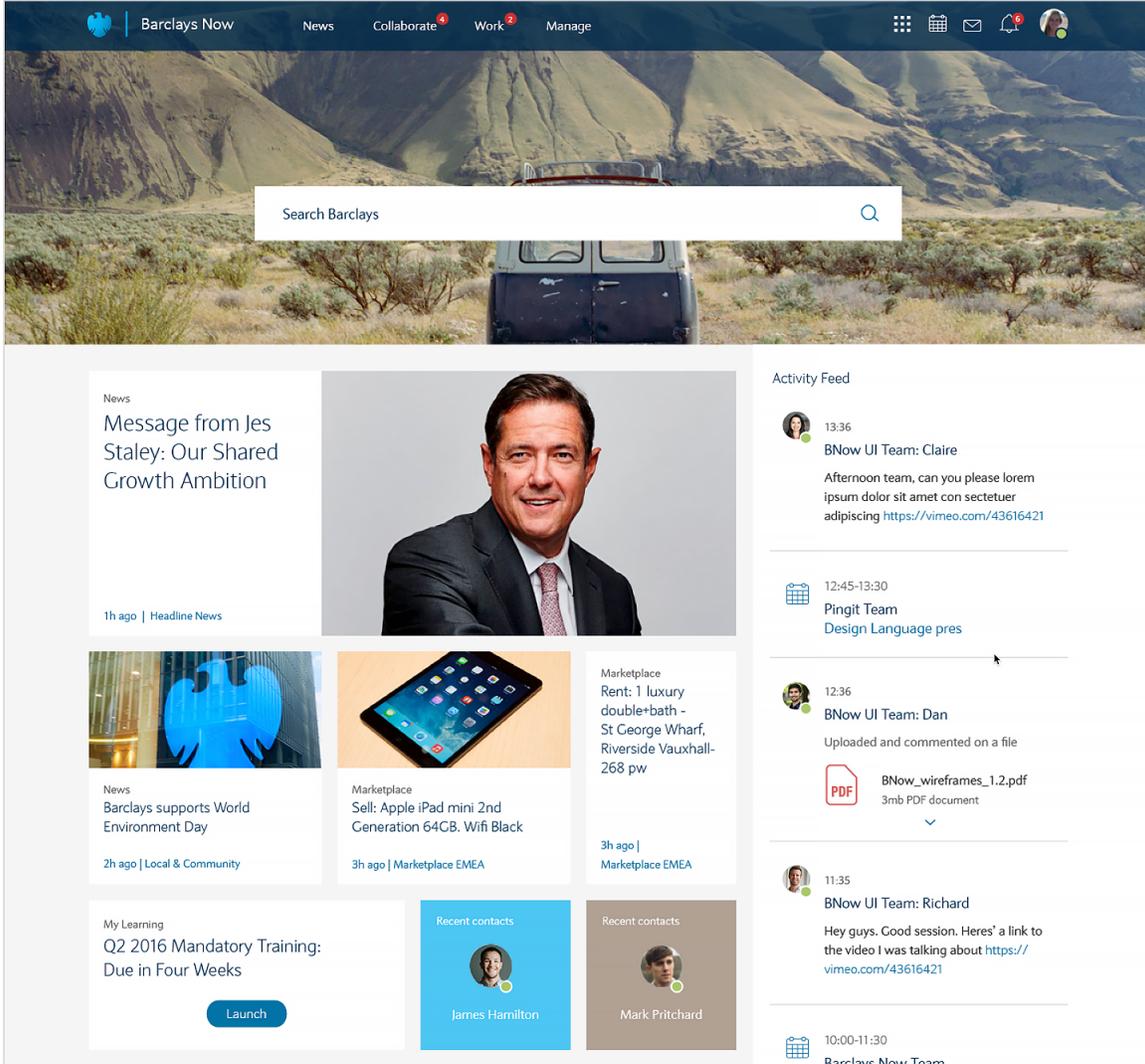
**Image 42. Barclays Intranet Design Process.** In this design, search is more prominent than the navigation links, as most colleagues navigated Barclays Now by searching. The *Activity Feed* in the right sidebar is another prominent feature. The social feed was intended to give the page a vibrant, active feel with real-time updates, as the previous design of news articles felt static.

*Barclays_13_home_concept3.png*
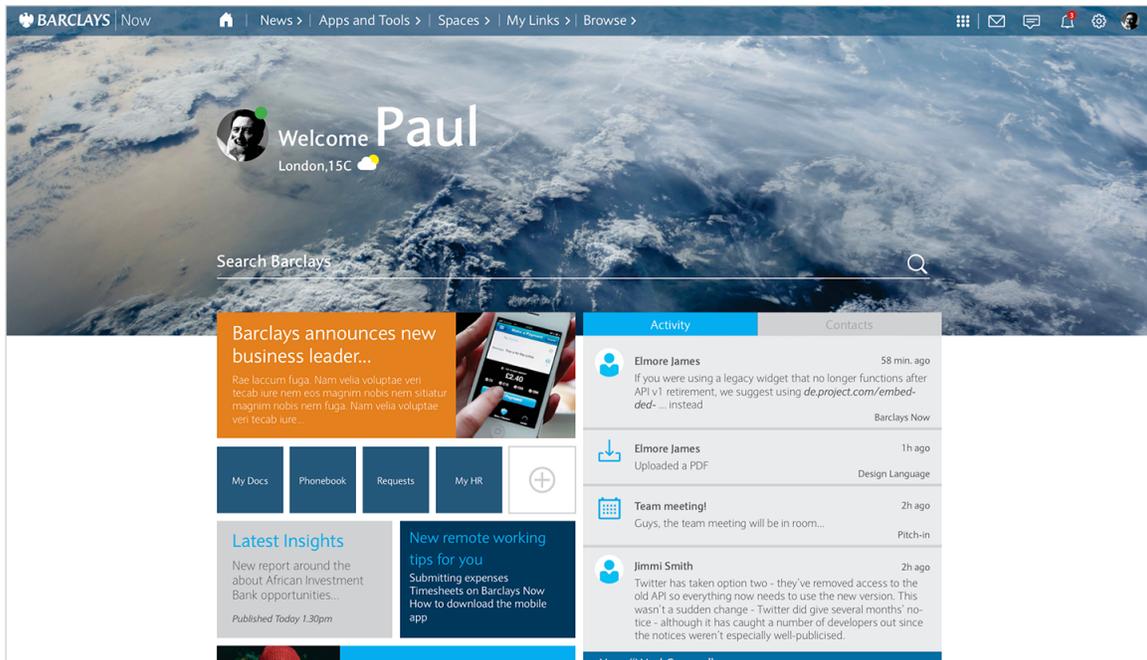
**Image 43. Barclays Intranet Design Process.** This design concept shows how the team attempted to find homes for all of the smart features. The page features a prominent search area, and the content area has entry points to pillars as well as promotional banners and news stories. Half of the content area is given to people—a tabbed activity stream of messages and another tab for contacts. *Barclays_14_home_concept4.png*

## Designing Collaboration Tools

Some frontline Barclays employees—such as those who work in the branch locations—don't have email, so Barclays Now gives them three types of collaboration tools:

- **Private messages** offer one-to-one or one-to-many instant messages.

- **Group chat** is an invitation-only feature that provides private chat rooms for project teams or other closed groups. Anyone can create a group chat, invite members, and share files and useful links.

- **Communities**—which anyone can join—unite communities of practice and other groups of colleagues from across the business who have shared interests.

Employees can use these channels to send formal or informal messages. They are secure, so it's safe to talk about confidential work. In contrast, a third-party chat tool would be blocked by security. Colleagues can use these collaboration tools on their personal or work mobile device; the tools are part of a microsite and that is being integrated into the new intranet with a redesigned front end.

During the design project, the designers usability tested these tools, asking colleagues to walk though their existing user journeys and think aloud so that team members could identify their pain points and barriers to conversion. The goal was to identify where the user was blocked from succeeding in a task—that is, the point at which a user would abandon the task in real life. The team uses a "pain rating" to categorize usability issues such as these, with the severity ranked on a three-point scale:

**1** = causes hesitation or criticism

**2** = the user eventually completes the task, but it takes more than one attempt

**3** = a task blocker

Once a usability issue had been identified and ranked, the team added up the severity score for each test participant affected by that issue, and then ranked the issues, putting the most painful ones first. The team then redesigned the journeys to resolve the pain points. Following are a few examples.

- "Teams" was a misleading name because users thought they were pre-existing chat rooms based on the organizational structure (i.e., that their own team would already be set up by default). Users understood what chat groups were, so the team changed the name.

- The team also made it quicker to create a team. Doing so requires only two fields: Group name and Group purpose. Prior to this change, users were asked to add team members and useful links.

## Getting Buy-in Through Promotion

Getting users to a new intranet is sometimes just as important as creating a great design in the first place. Barclays Now was rolled out in stages to different populations in the business. The team promoted the changes and drove adoption of new features through the following channels:

- **Barclays Now news articles:** Each group was emailed before the new intranet was rolled out to them. The emails contained a link to a teaser video showing some of the new benefits to come. After rollout, the groups saw a dynamic homepage banner with a link to a more detailed video.

- **Direct email communications**

- **Videos**

- **Homepage banners**

- **Elevator and lobby posters**

- **Tech excite days and tech bars:** During tech excite days, which are like tech fairs, colleagues and suppliers have stands where they can promote their products. They are held in London; Pune, India; and New York. The Barclays Now stand showed the new homepage on a TV screen and members of the intranet team provided information about the redesign and app. They also gathered feedback.
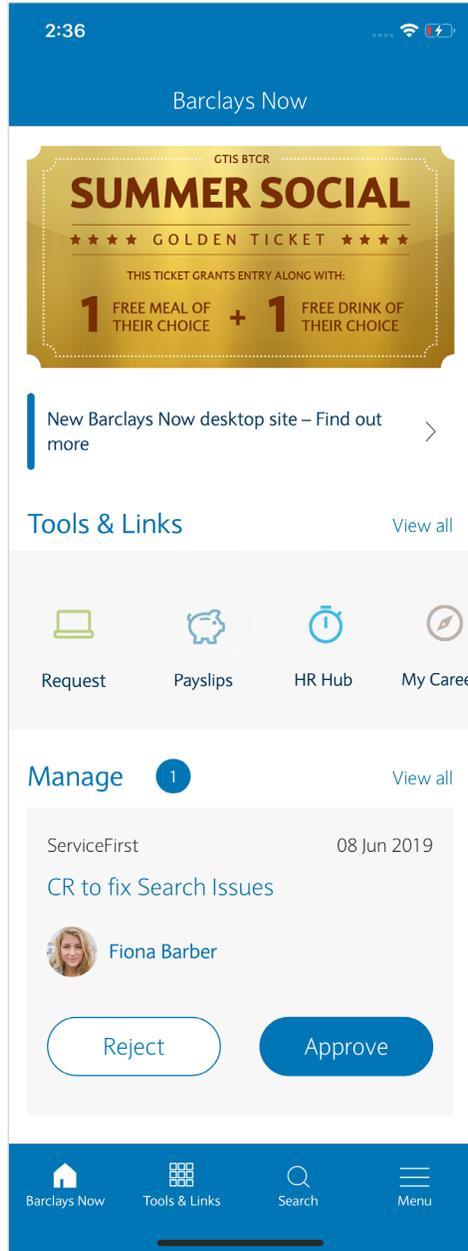
**Image 44. Barclays Intranet Golden Ticket Campaign.** The Golden Ticket was a campaign for a summer party. The ticket displayed exclusively to colleagues invited to the event, which was held in the Radbroke campus in July 2019. Presenting the ticket allowed colleagues entry to the party, where they could claim food and drinks. The campaign prompted more colleagues to download the mobile app so they could get their tickets.
*Barclays_15_mobile_home_version2.png*

# Designing for the Future
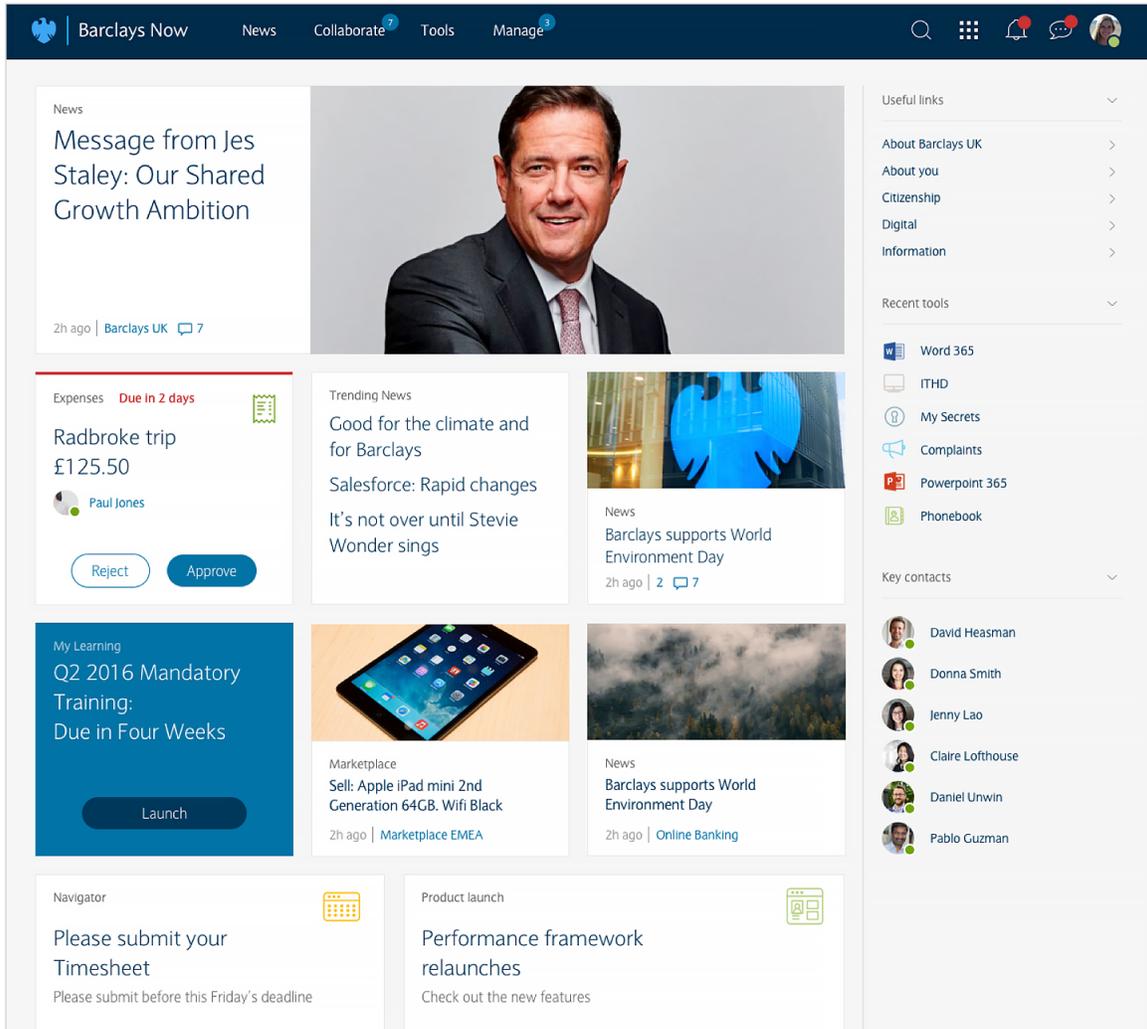


**Image 45. Barclays Intranet Smart Homepage Design Concept.** This design concept for the smart homepage includes modules for expenses, upcoming mandatory training, timesheets, key contacts, and recent tools. This is a design idea that has been proposed as a possible future homepage design direction. Many of these modules are now available or in progress on Barclays Now, and some are yet to come. *Barclays_16_smart_home_future_concept.png*

## GOVERNANCE

### Ownership

The DCE team at Barclays owns the intranet. This is the same team that researched, designed, and built the site, and continues to improve the site post-launch.

| Intranet Team Responsibilities | |
|---|---|
| Role | Responsibilities |
| Digital Colleague Experience Team (Site Owner) | Research, design, development, testing, and responding to user feedback |
| Corporate Communications | Provides content for the news article feed, which is written internally for bank employees. Articles are categorized and tagged by role, location, and topic. Articles are also ranked for prioritization purposes. |
| Various Barclays Departments | Built various tools and sites or their own third-party sites; the *Tools & Links* section within Barclays Now acts as a gateway for these sites. |
| Brand | Provides direction and governance: color palette, fonts, and logos |
| Accessibility | Direction, testing, remediation, and governance

The DCE team manages the relationship with the Accessibility Team and includes it in every spring in its Agile process. |

## URL AND ACCESS

| Access Information | |
|---|---|
| Item | Status |
| URL | https://now.barclays.com<br><br>Accessed on mobile via apps |
| Default Status | The intranet is set as each user's homepage and this setting cannot be changed. |
| Remote Access | All colleagues can access Barclays Now remotely:<br><br>• On desktop through remote login<br><br>• On mobile using the iOS app, Android app, or BlackBerry Access<br><br>Because Barclays embraces dynamic working, many users work across sites from home or while traveling. Some of these users are regular remote workers, while others work remotely on occasion. |
| Shared Workstation | Colleagues in branches share desks and thus have shared consoles, PCs, and iPads, but they all have individual logins.<br><br>Colleagues who hot desk in offices share PCs and also have individual logins. |

## TIMELINE

| Project Milestones | |
|---|---|
| Milestone Date | Milestone Description |
| 2014 | First consolidation from multiple intranets to one intranet |
| 2015 | Launch of Barclays Now mobile application |
| 2018 | Redesign and launch of mobile application on iOS and Android |
| 2018–2019 | Redesign and launch of new desktop site |

## CONTENT AND CONTENT CONTRIBUTORS

DCE does not have a content team; team members aggregate content from across the organization rather than create it themselves. The only content they create is the *Work with Us* page, the *About Barclays Now* campaign page, and FAQs. These are on a different platform than Barclays Now, so they can make updates without assistance from the development team. Other content sections are managed as follows:

- **News:** Rather than simply offer an external news feed, Corporate Communications writes the news articles that appear on the site. This content is custom and written specifically for the Barclays audience.

- **Tools & Links:** The business owners and the DCE team periodically review the *Tools & Links* section to ensure that these resources are up to date and relevant.
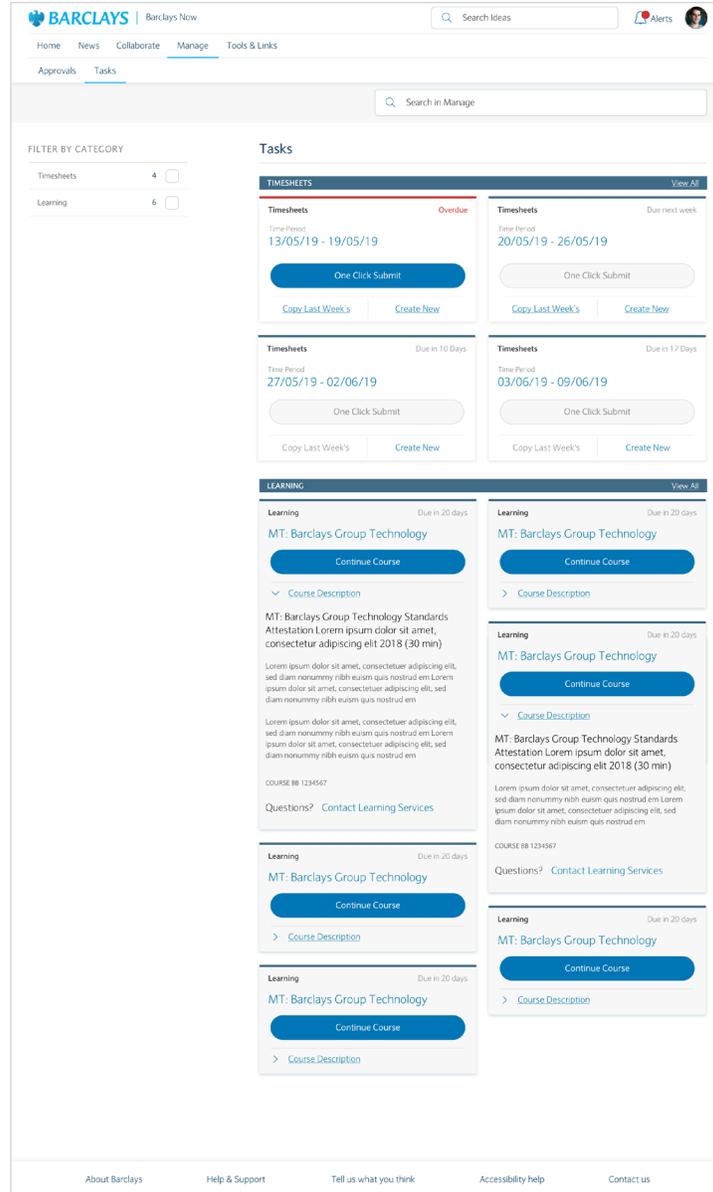
**Image 46. Barclays Intranet Timesheets.** Timesheets data comes from a third-party tool that has been integrated into Barclays Now. Many colleagues are required to submit a weekly timesheet so that projects can be cross-charged. The most common user task is to submit an exact replica of the previous week's timesheet, which can now be done in one click. Secondary tasks include the ability to copy a previous week's timesheet and edit it or create a new timesheet from scratch. This tool supports all of these task scenarios.
*Barclays_17_timesheets_tiles.jpg*
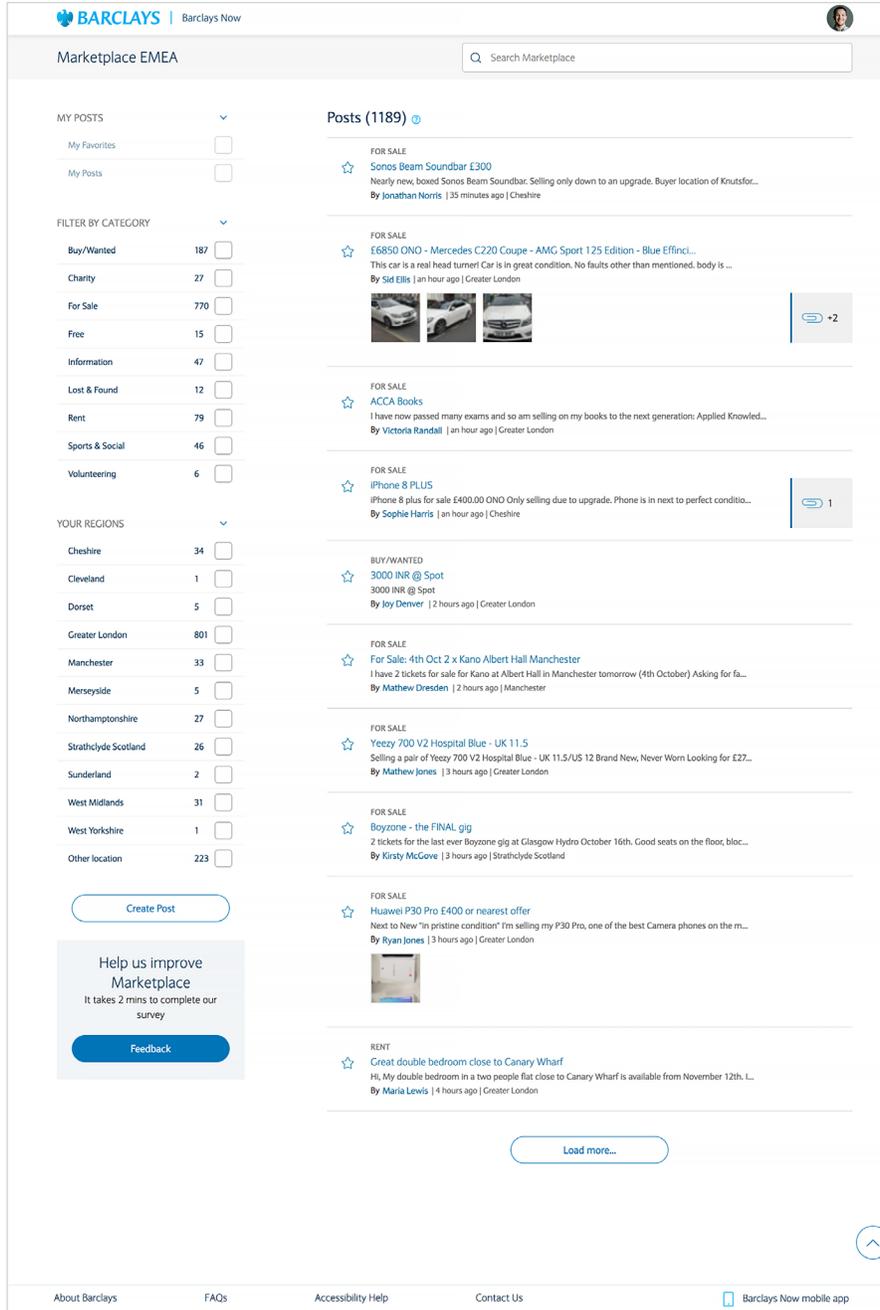
**Image 47. Barclays Intranet Marketplace Listing.** The *Marketplace* is a social feature where colleagues can post notices and advertise items for sale, accommodations for rent, charity events, and so on. Because *Marketplace* is social, it is not one of the core pillars in the global navigation. Instead, it's accessed via an optional homepage widget. *Marketplace* was available on the previous intranet but has been redesigned to let users add images on the listing page, mark posts as favorites, and filter by region.

*Barclays_18_marketplace_listing.jpg*
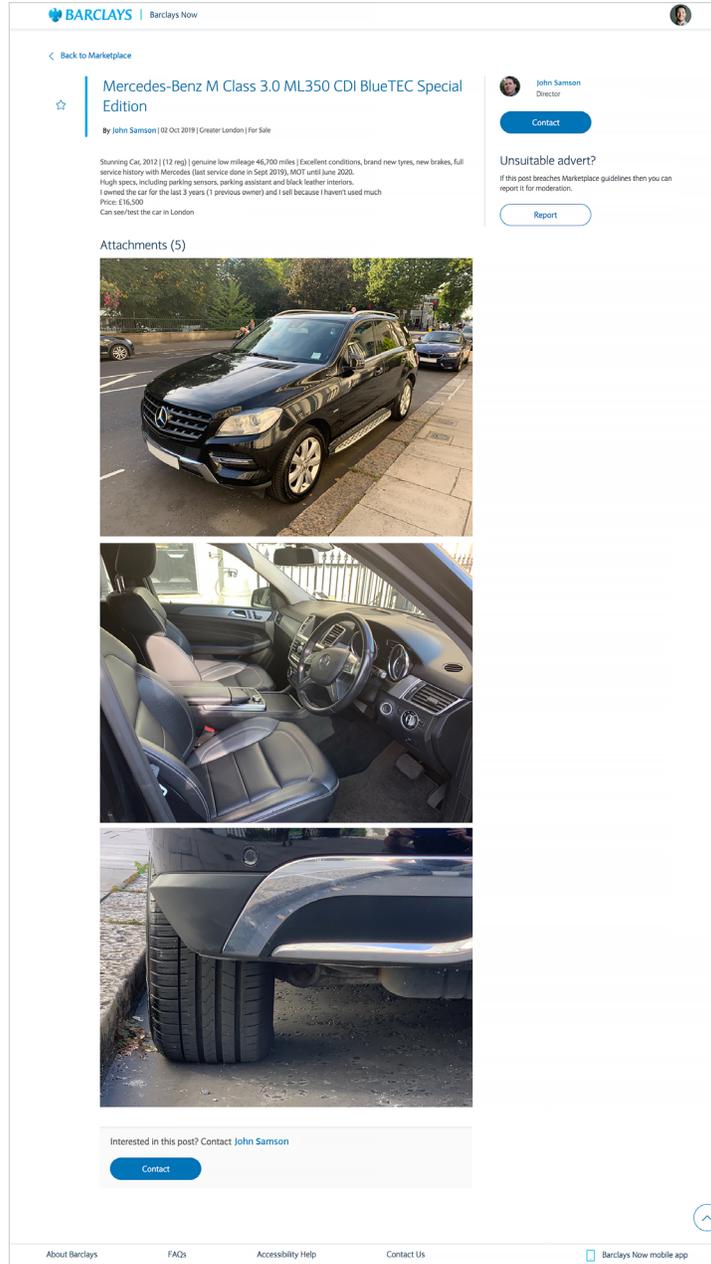
**Image 48. Barclays Intranet Marketplace Details Page.** This shows the details page for a *Marketplace* post. The content is user-generated and input using an entry form. *Marketplace* content includes a title, description, optional attachments, and shipping information. It also shows the poster's identity and a link to the poster's profile. Users can contact the poster to start a conversation and also share posts. *Barclays_19_marketplace_detail.jpg*

## TECHNOLOGY

DCE team members looked at different intranet products and had discussions with platform vendors; however, no out-of-the-box solution met their needs. For example, SharePoint couldn't do mobile. They also needed something compliant with the company's security requirements and capable of integrating with all internal systems. So, after some consideration, they realized that anything they bought would need so much customization that it would make more sense to build their own platform, the way they wanted it. They could then be confident it was compliant with the company's security policy.

### Building an Intranet In-House

The DCE team's role is to design and develop software for bank colleagues. As such, the team is better placed to understand the organization's employees, the business, and its culture than an agency would be. This further supported Barclays' decision to build its intranet in-house. The research and design of the intranet was an ongoing project spanning several years, and the team continuously improves the site and the app. It made more sense for an internal team to work on such a long-term, ongoing project.

As the project evolved, the team learned and changed its ways of working. For example, new releases happen over weekends when fewer colleagues are working. This means that the project team often works weekends. The team moved from two- to three-week sprints, partly to get more done and partly so that team members now work only one weekend in three rather than every other weekend.

## MOBILE

### Supporting a Multiscreen Workforce

Barclays Now is available as an iOS and Android app. The desktop site is also responsive and can be viewed on mobile using BlackBerry Access.

Originally, Barclays Now was a nonresponsive desktop site, but the team's persona research revealed that many people work from home, while traveling, or in locations away from their workplace. A mobile app was deemed the most user-friendly solution to support these work habits because it can be accessed directly from the screen, cutting out the navigation and layers of authentication that a bank usually requires. For example, fingerprint authentication is supported in the app, cutting out the need for more cumbersome types of authentication.

And, in a twist that shows the team's commitment to mobile, the desktop site was redesigned after the mobile site was designed. Originally, the desktop site was not going to be responsive because the mobile app already existed. So, responsive design was not a requirement for the site.

Research showed, however, that colleagues with one desktop or laptop screen open often used multiple minimized windows instead of tabs. If they wanted to see two screens/documents at the same time, they'd resize the windows and put them next to each other on the desktop screen. This behavior works only with responsive design, which led the team to choose it for the desktop.

## SEARCH

### Filtering and Refining Search Results

Search results are split into the following buckets:

- **Pages and Tools**: Barclays Now site content
- **Phonebook**: the colleague directory
- **HR Hub**: a separate HR site with its own search
- **News**: searches all news articles, not just the subset that are personalized to the user

Each category also has its own second level of filters. For example, the *News* category can be filtered by *Headline News*, *Role News*, and *Local and Community News*, and users can also search within a time period.

### Improving Search

Search was the first feature to be improved on Barclays Now, and the search feedback form was the first Barclays Now feedback channel offered to users.

Team members dug into the task of improving search results by analyzing searches to see what went wrong. They continue to analyze what users report through the feedback form and produce a monthly report that shows results relevance and content quality.

In the feedback form, users were asked what they were trying to find and the exact words they had entered. These missions and use cases provided great insight and led the team to add search functionality. For example, "I am searching employee number and can't find a colleague" led to the ability to search by employee ID.

Given how critical search is to Barclays users, the design team dug even deeper, reaching out to colleagues through video calls with screen share so they could explain in more detail exactly how the search fell short of expectations or failed.

The team also conducted usability testing on the search functionality during the design project, but the main and ongoing source of data used to improve search was, and is, the feedback form. It was the first feedback form to launch on Barclays Now, and colleagues have been using it to provide feedback for the past two years as the design of search was (and continues to be) continuously improved.

## Ongoing Improvements to Search Relevancy

The DCE team continues to improve relevancy, and has upgraded the search technology to enable further improvements. For example, results are boosted based on various factors. For some searches, such as HR policies, the results are boosted for the user's location as that information can vary by location; *Phonebook* results are also boosted for colleagues connected to the user's team. Further, team members added an algorithm that suggests alternative search terms using the *Did you mean [term]* prompt. They are currently assessing other capabilities as well, including "you may also like..." functionality to encourage horizontal journeys through search results.
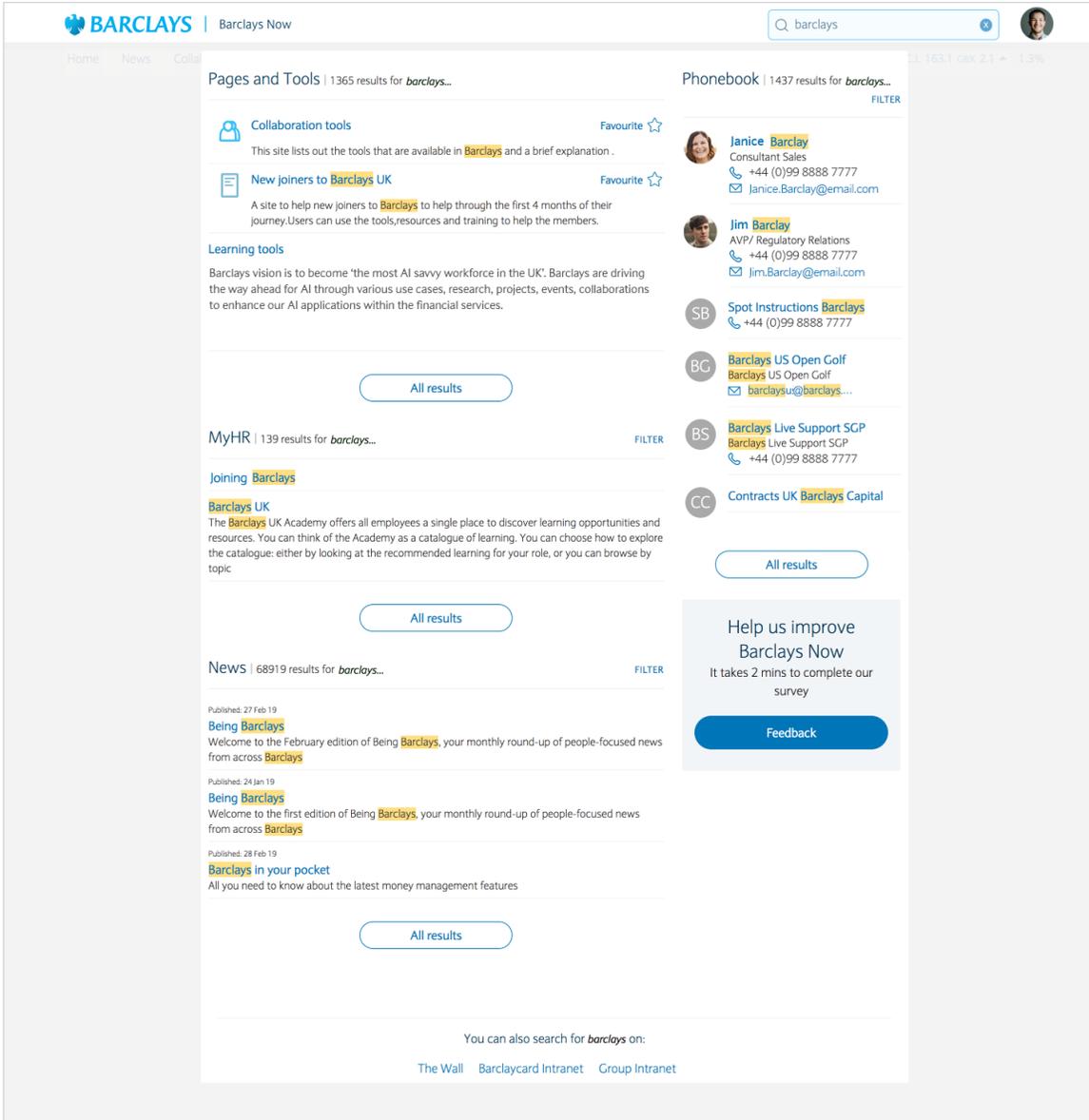
**Image 49. Barclays Intranet Search Results Page.** These results are pulled from the HR Hub, which is a separate site. Although it is not part of Barclays Now, colleagues expect to find these results on Barclays Now because it's "their homepage" and their go-to for information. *Barclays_20_search_results_live.png*
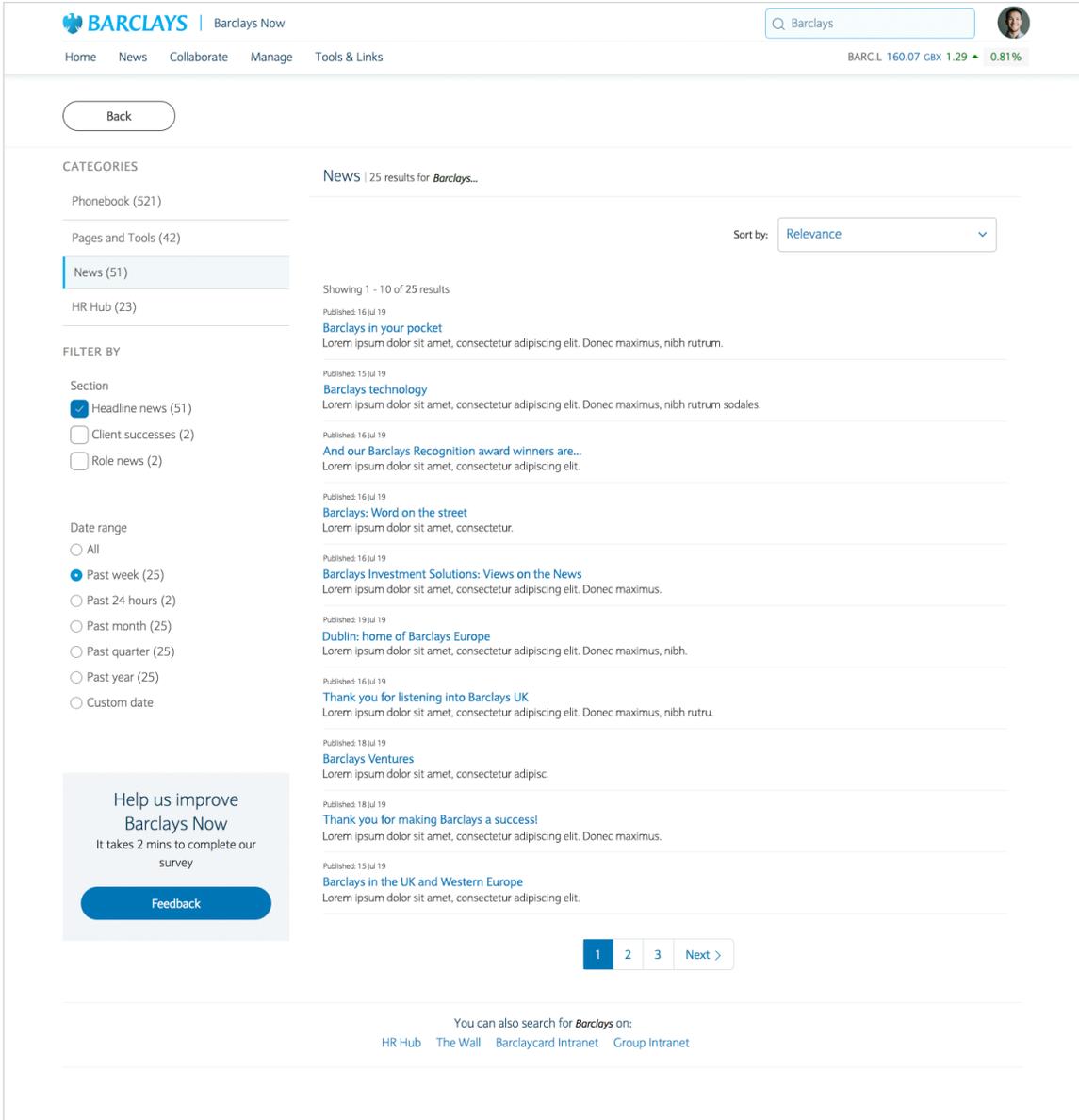
**Image 50. Barclays Intranet News Search Results Filters.** News search results with date range filters. Users can search news articles using date range filters to narrow results down to: the past month, quarter, year, or a custom date. The Custom date filter displays two calendars, from which users select a "from" and "to" date. *Barclays_21_search_filters_news.png*

**Image 51. Barclays Intranet Phonebook Search Results.** This shows search results for "David" in the *Phonebook* where users can refine search results to find colleagues according to: first name/last name, region, division, and role.
*Barclays_22_search_filters_phonebook.png*

## ROI

The DCE team is a called a "colleague-facing team" at Barclays and thus its success is measured in terms of cost and time savings, and colleague satisfaction metrics, rather than revenue. With that in mind, the intranet has made many verifiable contributions across critical business areas.

### Business problems solved

- Created a single search across people, tools, sites, and news, with HR content integration.
- Improved governance model, resulting in more consistent sites created around the business.
- Personalized and customized the site to meet differing needs of colleagues working in different countries and sectors.
- Decommissioned or integrated legacy sites on disparate platforms.
- Focused on accessibility, creating an intranet that is inclusive and built for all colleagues, regardless of their needs, role, or location.

### Strategic benefits

- "One Barclays" is a single intranet platform for all colleagues, regardless of their access needs or disabilities.
- Intranet mobility means that colleagues are always connected while on the move.

### Cost and time savings

- The self-serve password reset tool reduced contact center calls by 15,000 per month, saving approximately £4m since its introduction.
- Moving the favorite *Tools & Links* to the homepage gave users direct access upon landing, reducing the time they needed to find resources by 416 colleague-days per month.
- The mobile app enables users to work on the go, making travel time work time.
- Self-serve solutions provide faster issue resolution; for example, the intranet provides a solution to centralize all policy information in one location.

### Adoption and usage (monthly averages)

- 9.5 million homepage loads
- 600,000 news articles read
- 1.5 million tools launched through *Tools & Links*
- 15,000 task approvals
- 25,000 active mobile app users

## User Satisfaction

In a colleague-facing initiative such as Barclays Now, the platform's success can be measured in terms of user satisfaction. The team has been tracking that satisfaction as carefully as it tracks metrics. More than 1,200 user survey responses were submitted in the first two months after launch and 75% of the feedback was positive. Following are a few examples:

- *"I'm impressed with the layout as it makes access much easier. The favorites and quick links to the right of the page are especially useful for me as they are more efficient for daily use. It just looks slicker as well."*

- *"The new design is excellent! It's especially great how Collaborate notifications are highlighted, and helps promote communities."*

- *"Really enjoy the new layout on Barclays Now. The new way to approve requests is excellent, so much quicker than the Request Tool."*

- *"I simply wanted to say I like the new look and feel. It's intuitive, pretty quick. I also like my tools being readily to hand. Good job."*

- *"I like the experience of the hover-over facility for a brief intro to the story, [tool tips] that's really good. The homepage is really clean and responsive now!"*

- *"It's a lot easier to navigate and it's laid out in a more professional and cleaner format."*

- *"Homepage is really user friendly to navigate around. I haven't experienced any problems or issues at all. Everything that I normally look at is easily accessible. I love the fact that I can mark Role News as favourite."*

- *"Barclays Now page layout is easy and seems very quick to respond when browsing compared to previous, which is a bonus given how slow our systems tend to be."*

## LESSONS LEARNED

Some of the lessons the team learned are broadly applicable to any company trying to make a great intranet. For example: "Accessibility and analytics tagging were made part of the definition of 'Done.'" Other lessons are specific to the Barclays site, but provide teachable moments for any intranet team:

- "*Tools & Links* had previously been called *A-Z*, and colleagues reported that they looked for it and couldn't find it after the section was renamed as *All Tools and Links* on the new site. The team then renamed it *A-Z Tools and links* instead of *All*."

- "On the mobile app, users didn't realize news headlines were hyperlinked, so a more obvious link was added to view more."

- "A surprising result was the feedback we received. It has been 75% positive or neutral with only 25% negative. Our busy colleagues chose to take the time to send positive feedback,

prompted only by seeing a banner and button. We expected most users would contact us when something was wrong."

## Focus on What You Can Control

The Barclays' team also offers some advice for other teams who work in large businesses with multiple stakeholders:

- "Focus on what you can control and don't get hung up on what you can't. In common with other businesses, the team that owns the intranet does not own all the content. You can still improve the user's experience by making it navigable, searchable, and categorized. Where an application or content does not exist, you have an opportunity to create it. Make sure you do extensive research and design for real user needs, based on evidence. Where users have a number of different needs for the same feature, make it automatically personalized and manually customizable. Then provide a feedback channel, monitor your analytics, and continue to research and iterate after launch."

# Consolidated Edison, Inc. (Con Edison)

## OVERVIEW

### COMPANY

Consolidated Edison, Inc. (Con Edison) is one of the world's largest investor-owned energy-delivery companies, with approximately $13 billion in annual revenues and $46 billion in assets. Founded in 1823 as the New York Gas Light company, its electric, gas, and steam service now provides energy for the 10 million people who live in New York City and Westchester County.

The company provides a wide range of energy-related products and services to its customers through the following subsidiaries: Consolidated Edison Company of New York, Inc. (Con Edison), a regulated utility providing electric, gas, and steam service in New York City and Westchester County; and New York and Orange & Rockland Utilities, Inc. (O&R), a regulated utility serving customers in a 1,350-square-mile-area in southeast New York State, northern New Jersey, and northeast Pennsylvania. Other subsidiaries include: Con Edison Clean Energy Businesses, Inc. and Con Edison Transmission, Inc. (CET).

**Headquarters:** The Consolidated Edison, Inc. headquarters is in New York City.

**Company locations:** Con Edison and O&R have offices across New York and New Jersey,

**Locations where users use the intranet:** Office, field, and remote employees at Con Edison, O&R, and their affiliate Con Edison Transmission, Inc. (CET) use the intranet.

**Annual revenue:** $13 Billion

### THE INTRANET

**Users:** Approximately 15,000

**Mobile approach:** Desktop and tablet devices are supported through multiple design breakpoints.

**Technology platform:** SharePoint 2016 and Office 365

### TEAM

A cross-functional team of external consultants, UX experts, developers, technical architects, content strategists, and change management professionals worked together on all three releases.

**Leadership: Con Edison**: Mary McCartney, Executive Sponsor; Lionel Ing, Project Sponsor **West Monroe**: Kaumil Dalal, Engagement Lead; Carolyn Gusick, Project Manager

**Design team: Con Edison**: Hilary Kliros, Design Lead; **West Monroe**: Alex Foucre-Stimes, UX Lead; Anthony Salerno, QA Lead/UX Analyst; Uros Sijmovic, QA; **Clique Studios**: Ted Novak, Managing Director and Partner

**Development team: West Monroe**: Ryan Milton, Architect; Rick Williams, Architect; Adam Seppi, Senior Developer; Nick Carlson, Developer; Vamsi Gujju, Developer; **Con Edison**: Lesley Morrison, Christiaan Kent, Paul Hammer, Narender Kumar

**Change Management team: Con Edison**: Stephanie Viola, Change Management Lead; **West Monroe**: Carolyn Gusick, Lead; Eric Freshour, Lead; Ty Frost, Analyst

**Content Strategy team: Con Edison**: Ann Cameron, Elaine Cipriano, Marcia Cummings, Stephanie Viola, Analysts; with 30+ additional Corporate Affairs editorial staff and content managers/authors across the utilities; **West Monroe**: Alex Foucre-Stimes, Lead; Sasha Lovrich, Analyst; Uros Sijmovic, Analyst

# HIGHLIGHTS ABOUT THIS WINNER

The Con Edison intranet's name, *Conor*, was selected from more than a thousand employee suggestions. The name is both imaginative and inclusive, formed by blending parts of the names "Con Edison" and "Orange & Rockland" (O&R), the two regulated utilities for which the intranet was built. In fact, the entire intranet design gracefully blends these organizations through myriad features and rich content, all informed by user research and an effort to put employee needs at the forefront of the design.

The Con Edison intranet also excels at engaging employees with collaboration features, informing them with news and assistance in discovering new or related content, and promoting safety—a key mission of the utility.

- **Unifying multiple organizations in one design:** To meet a goal of joining Con Edison and O&R's 15,000 employees on one intranet, the design team created a consistent look and feel for all pages and integrated information from both organizations in features such as global navigation and search. It also offered the ability to toggle between locations and Instagram accounts, and recruited content managers from both organizations.

- **Clear page hierarchy:** Conor designers mastered in-page hierarchy by using large, bold black text for section titles.

- **Supportive iconography:** Minimal icons appear next to select content to help mark page sections. Typically, it's difficult for any designer to derive a good icon for every content selection, so these are used sparingly yet consistently on Conor. The small visuals help users recognize the type of content in each page section.

- **Curating content for the homepage:** With a vast amount of information, it can be difficult to include just the right amount on the homepage. But designers here practiced restraint; they chose, for example, to display just three items each from the many news stories, announcements, and events.

- **Customization:** Conor offers its users preferences, letting them select the types of news, announcements, and events they want to see. Customization is one more way to declutter the UI while giving employees what they want, be it a little or lot of information. The design team includes key elements of successful customization features, ensuring that employees understand:

  - that they can make selections,
  - the results of their selections,
  - how to make selections, and
  - how to edit selections.

- **Safety statistics:** Gas and electricity can be a dangerous if not treated properly. Con Edison takes pride in its safety statistics and shares them with all employees via Conor.

This is one way for the organization to demonstrate commitment to safety—and its desire for all employees to do the same.

- **Content managers on each page:** A smart way to keep content updated is to display the name, photo, and contact information for each page's content editor or editors. This not only gives employees a specific person to contact if they have a comment, suggestion, or issue, it also instills a sense of pride in the content manager's work.

- **Tips for discovering features and content:** Conor integrates subtle, yet helpful, assistance throughout the site to ensure that employees find the features and content they need. The team employed various methods to provide these touches, such as displaying a welcome dialog box and animated bubbles related to preferences; short, in-place instructions for favorites; and the most popular search terms and favorited links.

- **Content patterns in the right rail:** When appropriate, pages provide consistent content specific to their main topic in the right rail; these items include an FAQ, calendar of events, and information about the page's content owner.

- **Responsive:** About one-third of Con Edison's employees are in remote locations or on the road. These employees use Toughbooks, which have a smaller viewport than many modern laptops. To address this, the design team made Conor responsive and fluid so employees can work effortlessly regardless of their screen's size.

## BACKGROUND

In December 2015, Con Edison kicked-off the visioning component of a project aimed at enhancing the digital experience for its approximately 15,000 employees. The result was a redesigned intranet created with five key objectives in mind:

- Promote the safety of utility employees and the public
- Engage employees
- Encourage interaction
- Provide the information and tools needed to achieve operational excellence
- Provide great customer experience

Unifying Con Edison and O&R employees on a single intranet platform was a critical project requirement; other requirements included enhanced search capabilities, a standardized look and feel, consistent department templates, redesigned employee communications, and digital forms, policies, and procedures.

The new intranet's homepage is the default page for internal web browsers, providing all employees a digital front door to all other collaboration sites and applications outside of Conor.

To source the new name for the intranet, the company invited all employees to submit

suggestions. Many of the 1,000 submissions received suggested "Conor" or some variation thereof. The project team views the moniker as a portmanteau for "Con Edison" and "Orange & Rockland," the two regulated utilities the intranet was built to bring together.
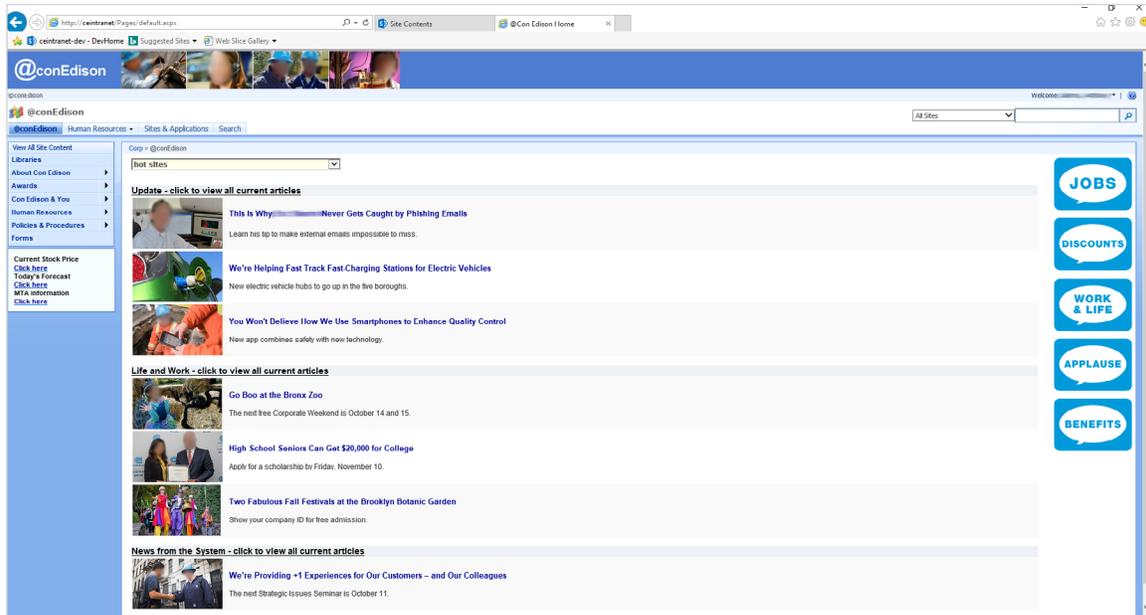


**Image 52. Con Edison's Previous Intranet Homepage.** Con Edison's previous intranet site lacked a modern user interface and employee engagement.
*ConEd_01_Hompage-Version1.png*

# DESIGN REVIEW
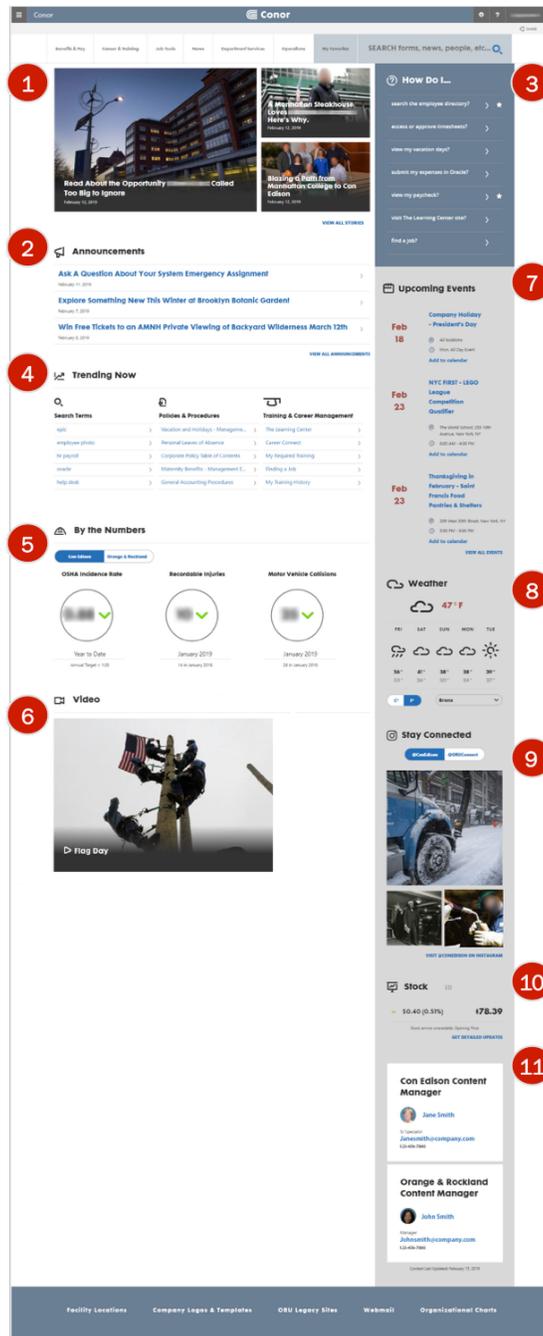
## Homepage



**Image 53**. **Con Edison Current Intranet Homepage.** Con Edison intranet users can scan news, announcements, safety statistics, events, and more on the homepage. *ConEd_02_Homepage-live.png*

## Homepage Highlights

Acting as the default page for internal web browsers, the homepage houses content that's personalized based on employees' selected preferences for their energy company and regions. Employees can get the full scoop simply by scanning this page.

1. **News:** Conor boasts a huge number of news stories about a wide variety of topics, leveraging high-quality images from Con Edison's in-house photography team. Three important news items, curated from the full news set, appear at the top of the homepage. Each shows the article title in large, bold text and the date it was published in an international format (with the day, month spelled out, and four-digit year). The *View All Stories* link below and to the right of the news items opens a page that contains a world of news.

2. **Announcements:** With about 15,000 employees working in multiple principal business segments—providing regulated electric, gas, and steam—there are bound to be announcements. Employees don't have to look far to find these. The *Announcements* page section heading is large and easy to find, just below the news section, and shows the three latest announcements. Each has a large title link, followed by the posted date. All the announcements are just a click away, via the *View All Announcements* link.

3. **Common questions:** An FAQ titled *How do I…* displays seven of the questions that employees ask most frequently. Clicking any one of the questions leads to a page with its answer.

4. **Trending:** The five most popular items in three main topics areas—*Search Terms, Policies & Procedures*, and *Training & Career Management*—appear in the center of the homepage. This section is all about information discovery. It suggests items that might be important to employees, but that they might not even think to look for.

5. **Safety stats:** Con Edison wants employees to think about safety every single day, as it is essential to the organization. Thus, the homepage includes a *By the Numbers* section with three measurable safety elements: incidents, injuries, and vehicle collisions. The links at the top allow users to toggle between *Con Edison* and *Orange & Rockland* statistics. This is one of many ways in which the intranet team honored the goal of unifying Con Edison and O&R employees on one intranet. The numbers (greyed out for privacy reasons) are shown under each descriptive heading as large, black text in a circle. In this view, green down arrows indicate that the numbers are down (which is better in this case) either from the target or from the same month in the previous year. If the numbers had worsened, the arrow would be red and point upward. The arrow can be either color and point up or down to accommodate any metric and target. The current month and year labels appear just below the circle, as does the target number or the previous year's stat for comparison.

6. **Video:** Toward the bottom of the homepage a current, interesting video is linked from the video library and displayed with its title. These short clips vary in topics, from a

CEO message to highlighting a particular employee. Showing information in different mediums—photos, graphics, text, and video—is one more way that designers keep employees not only informed but also engaged when using Conor.

7. **Events:** A dedicated space in the homepage right rail houses three upcoming events; *View All Events* links to a page that shows them all. The section is easy to work with. It includes a large date, the event title—which is also a link to more information—the event location and time, and a link that enables employees to add the event to their personal calendars.

8. **Weather:** When you work outside or support products that are heavily relied upon in all weather conditions, knowing what's happening outside is of great importance. The homepage's weather section in the right rail shows employees the weather for the week ahead. The current weather and temperature appear first, followed by a small table forecasting the next five days. Small, recognizable icons, such as a sun or a cloud, represent conditions at a glance. The expected high temperature is bold and black, while the low temperature (positioned appropriately, below) is light grey. Users can easily toggle between Celsius and Fahrenheit using the blue and white switch and choose different locations from a drop-down list.

9. **Instagram:** The design integrates the latest posts from the companies' Instagram feeds to help keep users abreast of what's happening on social. Users can toggle between the Con Edison and O&R accounts, another way the team met the goal of unifying all employees on the intranet.

10. **Stock price:** Many employees own stock or options and are invested in the shared success of the company. The current stock price is thus displayed in the right rail. It also appears below the fold on the homepage, which is often a good position for stock prices during times of market volatility. The stock symbol, price change, price per share, and a link to detailed updates are all available and legible even in a compact space.

11. **Content managers:** The homepage content managers (from both Con Edison and O&R) are listed at the bottom of the homepage's right rail, which shows each manager's name, photo, job title, email address, and phone number. The names link to the manager's employee profile page. With this information, any colleague can easily contact the editors, which facilitates speedy corrections and content idea submissions from more employees.

## Set Up Preferences
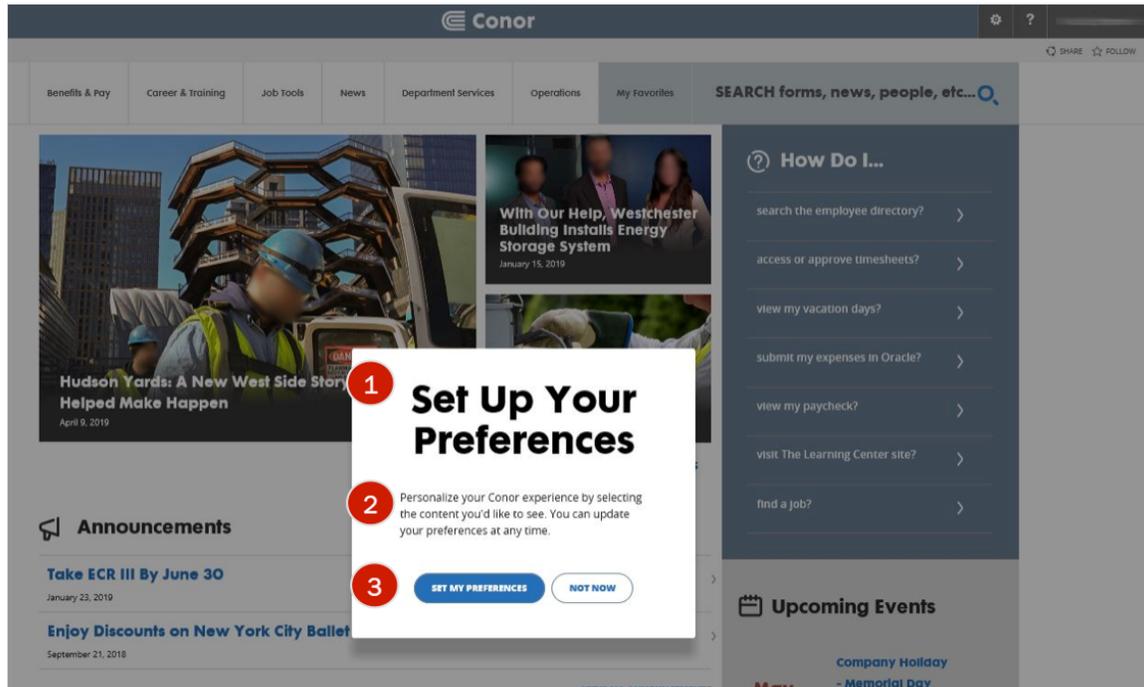


**Image 54. Con Edison Intranet Set Up Preferences.** When first opening Conor, a descriptive dialog asks users to choose their preferences.

*ConEd_03_Preferences-live.png*

## Set Up Preferences Highlights

The first time Con Edison employees open the intranet, they are asked to set up their preferences. This is a smart way to coax users into taking a few moments to tailor the Conor experience to suit their needs.

1. **Command:** The large title of the dialog box gently commands users to set up their preferences. The power of suggestion can help persuade many users to comply.

2. **Description:** The descriptive text explains that personalizing benefits users by displaying "content you'd like to see." It also takes the pressure off, explaining that users can update preferences at any time if they're too busy to do so now.

3. **Buttons:** The *Set My Preferences* and *Not Now* buttons match the language in the description, offering easy and expected choices. The blue button color on a white background makes the button for setting preferences more attractive, as does the authoritative button text label. This subtle button design is another way to create a strong call to action.

## Preferences Reminder
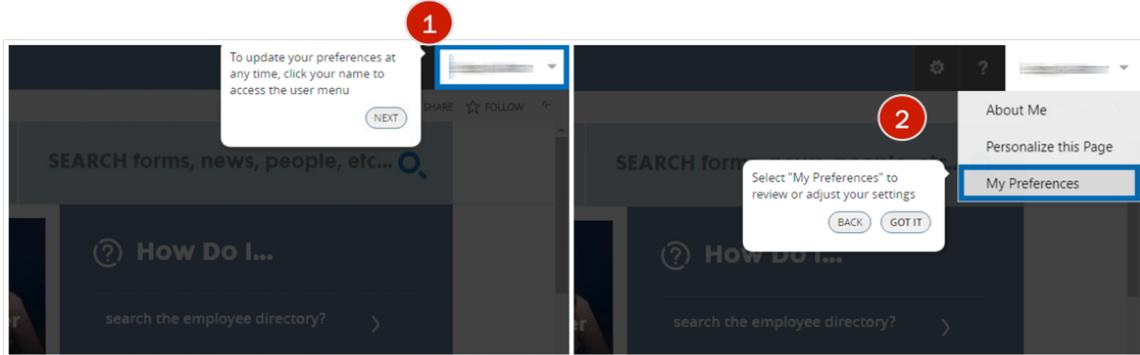


**Image 55. Con Edison Intranet Preferences Reminder.** Preferences reminders are shown as animated message bubbles: *To update your preferences at any time, click your name to access the user menu* and *Select "My Preferences" to review or adjust your settings*. These appear by the user's login name link and in the *My Preferences* menu, respectively. *ConEd_04_Preferences-Instructions-live.png*

## Preferences Reminder Highlights

Selecting either the *Set My Preferences* or *Not Now* button in the *Set Up Your* Preferences dialog box opens an animation with reminder notification bubbles. These appear by the user's login name link, as well as in the *My Preferences* menu.

These reminders are not just particulars; rather, they reinforce the promise made in the dialog that welcomed users to Conor and explained that users can edit their preferences at any time. These message bubbles give more credibility to the intranet and the team responsible for it.

1. **Access the menu:** Users need to perform two steps to get to the *My Preferences* page. First, they must open the menu. Second, they must select the command to access the page. Given the importance of selecting preferences, designers wanted to ensure that users find that first step, so they created an animation message bubble—*To update your preferences at any time, click your name to access the user menu*. As added insurance, a *Next* button appears at the bottom of message bubble and opens the next message.

2. **Access the page:** The animation shows a message: *Select "My Preferences" to review or adjust your settings*.

## Preferences Page



**Image 56. Con Edison Intranet Preferences Page.** On the *My Preferences* page, users can select which company news they want to see, and choose which events—from New York City boroughs and beyond—that they would like to see. *ConEd_05_MyPreferences-live.png*

## Preferences Page Highlights

On the *My Preferences* page, users can customize which news, announcements, and events they will see. These selections enable content managers to push out the most desired and needed information to each employee. Each selection on this page is offered based on the utility with which the logged-in employee is affiliated. It will default to Con Edison if the logged-in users are Con Edison employees, but they can also select *Orange & Rockland* if they'd like updates from both companies.

1.  **Page title:** The large, bold *My Preferences* page title helps confirm where users are on Conor, and that the changes they make pertain specifically to them. The breadcrumb below the global navigation also confirms the location, which is a nicety.

2.  **Instructions:** A short but enticing instruction at the top of the page communicates that making selections will give the user a "more personalized Conor experience."

3.  **Companies:** A prompt explains that users can elect to receive news about one or both companies. Bolding just the word *news* makes it easy to scan the text and glean its main point. The checkbox reinforces the message that users can choose one or both companies.

4.  **Boroughs:** Employees can choose from the five boroughs, nearby Westchester, and all regions related to O&R for their announcements and events. With these options, users can view an abundance of information—or just local information. It's their choice.

5.  **Email notification:** Users can enable Event Notifications with a flip of a switch, turning on emails about events that match the various region-related categories.

## Favorites Menu
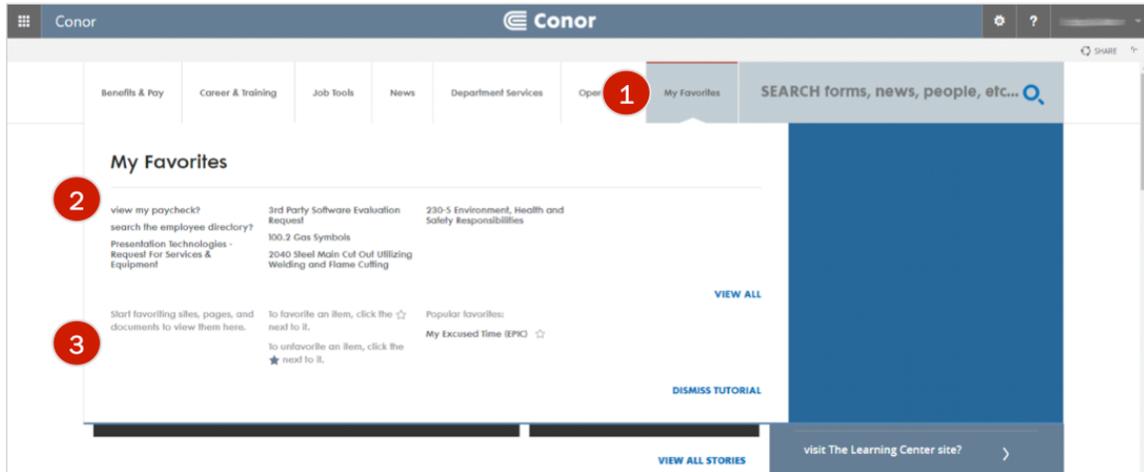


**Image 57. Con Edison Intranet Favorites Menu.** Users access their favorited links via the *My Favorites* menu in the global navigation.
*ConEd_06_My-Favorites-live.png*

## Favorites Menu Highlights

Users can easily find, access, and update their favorites via the global navigation. These favorites travel with employees, which is especially helpful for those who travel often, work in the field, or don't have a dedicated computer.

1. **Global navigation link:** There's no point in offering bookmarking capabilities if users can't get to them quickly. With this in mind, Conor designers dedicated a *My Favorites* link in the global navigation for the user's favorites. Hovering over the global navigation command opens a megamenu full of the user's favorites.

2. **Menu links:** The large menu displays links to the user's top 12 favorites, as well as a *View All* link that leads to a page containing all of the user's favorites.

3. **Assistance:** In an effort to help users discover content, the *Popular* favorites menu section displays the most commonly favorited pages. A mini-tutorial helps users quickly learn how to add and remove favorites. The *Dismiss Tutorial* link hides the advice and shrinks the menu.

## Favorites Page



**Image 58. Con Edison Intranet Favorites Page.** The *My Favorites* page displays all of the user's favorites and allows them to manage them.

*ConEd_07_Favorites-Management-Page-live.png*

## Favorites Page Highlights

Employees can view their entire list of favorites, follow the links to navigate to the favorites page, or manage the list of favorites on the *My Favorites* page. Further, star icons on pages throughout the site enable employees to easily add favorites. Clicking a hollow star icon: 1) adds the page to the employee's favorites, 2) changes the star icon from hollow to filled in (for the next time the employee sees that link or document), and 3) displays a red notification icon in the global navigation menu to indicate that the employee has added a new favorite.

1.  **Instructions:** Brief instructions at the top of the page inform users that they can click an empty star on any page to add the page to their favorites list. Additional helpful instructions inform users that the top 12 items appear in the menu; they also explain how to reorder the links list and how to fix a broken favorite link.

2.  **Edit, delete, and move:** Icons to the right of the favorite label—a pencil, an "x," and a three-line move icon—allow users to edit the name of the favorite, remove it, or change its position in the list.

3.  **Add a favorite:** The *Add a link* button in the bottom left of the page enables users who know a page by its link to add it as a favorite (rather than having to navigate to the page and choose the star icon).

## Alerts
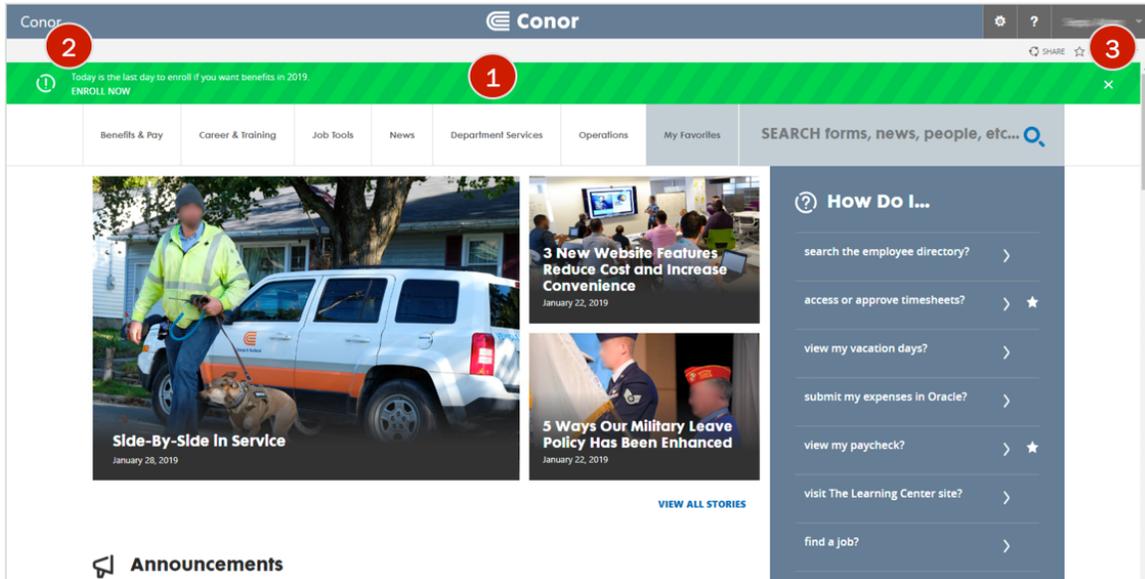


**Image 59. Con Edison Intranet Alerts.** White text in a bright green bar at the top of the homepage alerts users to enroll in their benefits. *ConEd_08_Alerts-live.png*

## Alerts Highlights

The services Con Edison provides are critical to many customers' well-being and health. Thus, the organization doesn't shut down during emergencies—such as dangerous weather conditions. Instead, employees often need to work even harder and still be able to communicate with coworkers. Setting aside emergency-related information, some announcements are more important or time-sensitive than others. Alerts are a good medium for these types of information.

Conor gives content managers options when creating alerts. They can define an alert as persistent—that is, it will display until they remove it—or give users the option to dismiss it on their screen. When creating alerts, content managers are also given tools that let them choose from various background stripe colors, and add icons or links to alerts.

1. **Colored bar:** Because alerts appear at the top of pages, employees are more likely to see the information than if it were in the *Announcements* section. The UI of the alert medium implies that alert topics are potentially important or serious.

2. **Content:** The alert includes text and an optional icon and link.

3. **Dismiss:** If enabled by the alert creator, users can click the *x* icon to dismiss the alert.

## News Section
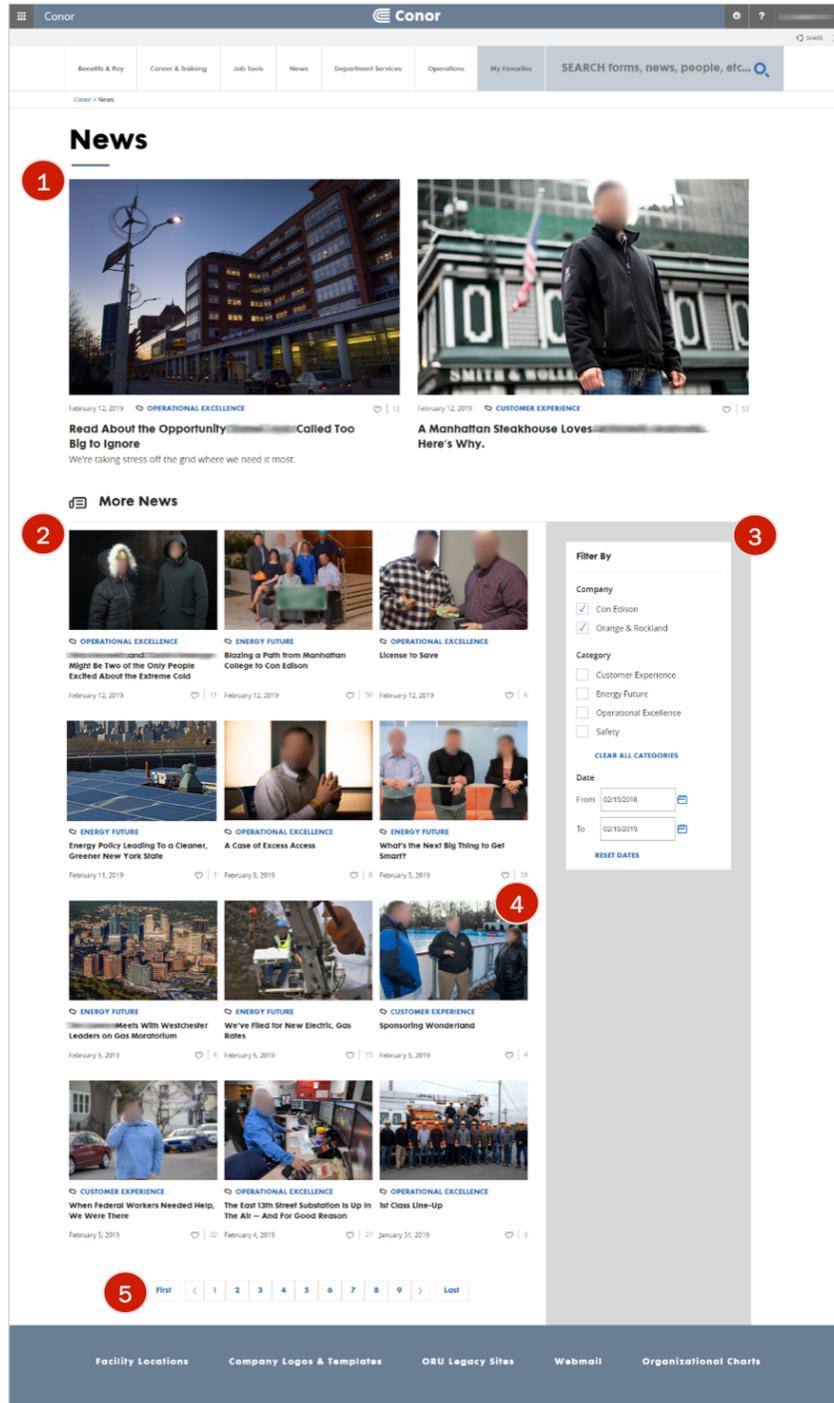


**Image 60. Con Edison Intranet News.** Conor's *News* page displays large images related to each news item, plus the tiles, date, and more. Users can filter the news by topics of interest to them. *ConEd_09_News-Article_live.png*

## News Section Highlights

Articles tell stories about employees and their efforts, or news about the organization. Conor's *News* section packages these gems in a way that's easy to scan or sift through.

1. **Top articles:** The top two items on the *News* page are featured articles, with much larger images than the rest of the articles on the page. These are likely more specific to the user than the others because they are chosen based on the user's selected company preferences.

2. **Articles:** Each article is brought to life with photos from Con Edison's in-house photography team. Each news item includes a large thumbnail photo, the name of the main topic to which the article relates, a bolded title, and the publication date.

3. **Filtering:** With so many new articles to choose from, it's handy to be able to view just a subset. Users can filter news via the facet checkboxes on the right. Topic areas include *Company, Category*, and *Date*. The links to *Clear All Categories* and *Reset Dates* make it easy to start fresh if the selections refined the set of articles too much.

4. **Liking:** In the right-hand corner below the article's image, users can click the heart icon to like the article. The number next to the heart shows the number of likes the article has garnered.

5. **Pagination:** The pagination icons at the bottom of the page let users scroll through all available article pages.

## Article
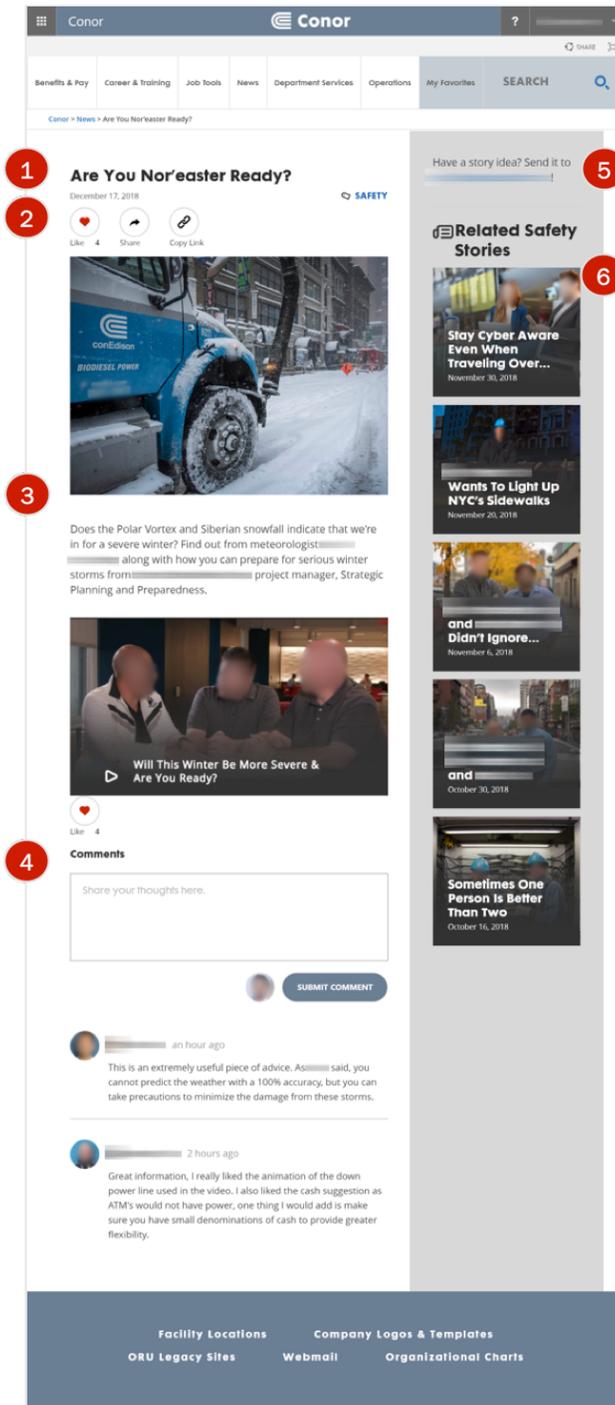


**Image 61. Con Edison Intranet News Article.** News articles offer capabilities that encourage users to engage—by sharing, liking, and commenting. Discovering more interesting content is also easy through the related articles section.
*ConEd_10_Full-Length-News-Detail-live.png*

## News Article Highlights

News articles include images and information to keep Con Edison employees updated. Commenting and liking features enable employees to share their knowledge, express opinions, and have healthy discussions about the article's topic.

1. **Information:** The article's title, date, and tagged topic appear at the top, above the image. These elements frame the article and provide clues as to what it's about. Clicking the tag link leads to the main *News* page, filtered to display articles with the matching tag.

2. **Actions:** Sharing articles helps surface information for employees and allows them to engage with one another. Users can act upon an article in three simple ways: *Like, Share*, and *Copy Link.* Each of these options appears above the article's image. They are shown as icons for simple recall and as a text link for users who don't recognize the icons. Selecting *Share* opens a pop-up window with a type-ahead people-picker so users can select colleagues with whom to share the article. The recipients receive an email that displays the article.

3. **Image and text:** Images are large and convey a lot of information. Dark, sans-serif text is legible on the white page background.

4. **Commenting:** The *Comments* section appears just below the article. An ample field with the prompt *Share your thoughts here* encourages people to participate. Comments appear below the field along with the commenter's name, photo, and when the comment was written.

5. **Ideas:** Employees are encouraged to share their story ideas, which can help keep news fresh and diverse. The *Have a story idea? Send it to* (email address blurred for privacy) can prompt people to ask for stories about topics they want to learn about.

6. **Related:** The right rail displays a list of articles related to the selected story's topic (such as *safety*). The column title includes the topic and notes that the stories are related so that users understand the selections and can read more stories about the target topic.

# Human Resources Section
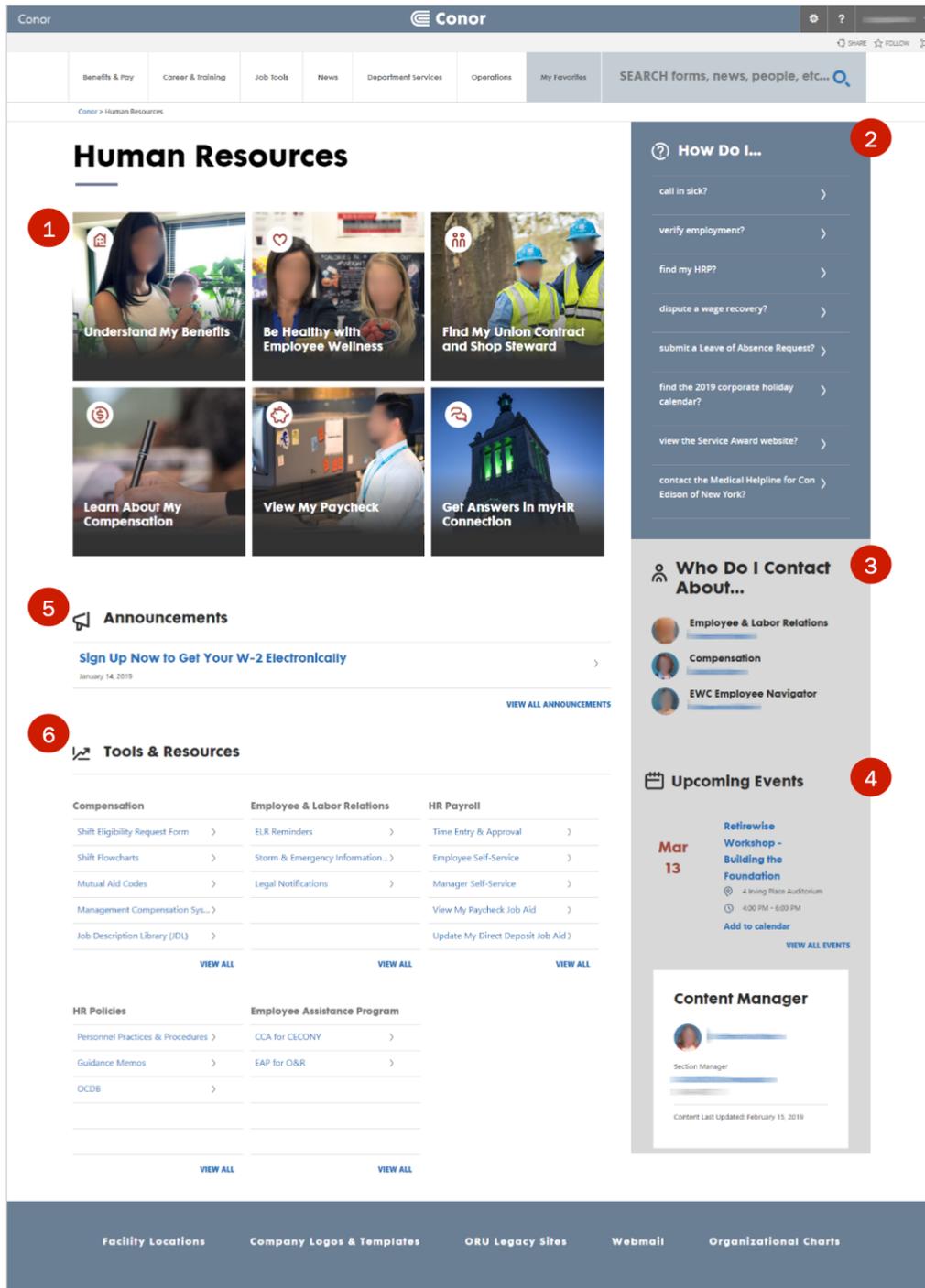


**Image 62. Con Edison Intranet HR Section.** The *Human Resources* section is organized and rich with content to provide important information to Con Edison employees. *ConEd_11_HR-Homepage-live.png*

## Human Resources Section Highlights

Con Edison employees ranked HR information as most important in the intranet team's user research study. Thus, the team took additional care to ensure that this section of Conor was highly useful and usable. For example, there are two content managers for this area—one for Con Edison, and one for O&R—plus various other content contributors.

1. **Key information:** Six need-to-know topics appear as cards at the top of the *Human Resources* page.

2. **FAQ:** The *How do I…* prompt leads off the eight common questions encompassing an HR-related FAQ list on the right side of the page. This is a quick way to provide answers to common questions.

3. **Contact:** The *Who Do I Contact About…* section helps employees find the right HR contact when they need to get personalized advice from a professional.

4. **Events:** As on the homepage, upcoming events (in this case, HR events) appear in the right rail.

5. **Announcements:** The latest HR announcements appear center stage to keep employees up to date.

6. **Tools and resources:** The *Tools & Resources* section consolidates links to numerous tools in areas such as compensation, payroll, and policies. Subheadings make each list easy to scan, as does limiting each list to a few links. The *View All* link leads to a full list of resources for each category.

# DESIGN PROCESS AND USABILITY WORK

The Con Edison team went right to the source to understand what mattered most to Con Edison and O&R employees: users themselves. To inform the design process, the team employed three key types of user research: observational research, interviews and workshops, and personas.

## Observational Research

The team wanted to get to know employees and understand how they work on a day-to-day basis, so team members observed employees in the settings where they work. For example, they joined field employees in their work trucks to observe how they attempted—and sometimes failed—to access the intranet using hard-wired Toughbooks. They sat with office workers to observe how they used desktop computers. And they went to several field office locations to understand how employees used kiosks to access the intranet when computers were unavailable to them.

These observations helped the team understand the environments where employees work and would ultimately use the newly designed intranet. The observations also provided input for developing employee personas (described below).

## Employee Interviews and Workshops

In addition to observational research, the team conducted discovery workshops with a cross section of 50 employees from various business units across five company locations. These participants had different levels of organizational tenure, digital aptitude, and leadership, and represented both office and field roles.

Discovery workshops provided insight into how employees work together and how the new intranet solution could help the company create a more productive, connected, empowered, and engaged workforce. To capture insights from workshop participants, the team created "placemats" that gave employees an opportunity to share their thoughts—even if they didn't want to say them out loud.

**Image 63. Con Edison Intranet Design Placemats.** The design team created "placemats" that gave employees an opportunity to share their thoughts, even if they didn't want to say them out loud during discovery workshops.
*ConEd_12_Placemats.png*

The discovery workshops surfaced four common themes based on participants' assessments of the old intranet (along with the information employees provided on the placemats). The following four themes helped the team prioritize the requirements for the new intranet:

- **Search:** To no one's surprise, employees frequently cited search as the biggest intranet pain point. They were frustrated with the existing search functionality and usually abandoned their searches.

- **Content:** Workshop attendees questioned the old intranet's freshness, readability, and length of content. They frequently mentioned that it was difficult to locate the "latest and greatest" versions of documents and information they needed to do their jobs.

- **Remote access:** A majority of field and desktop employees communicated the importance of being able to access the intranet from outside the office.

- **Usability:** Employees indicated that they learned where to find information and how to use the intranet on their own. They said that they taught themselves how to use the old intranet, and did not receive training or guidance on how to use it efficiently.

The team asked workshop participants to rank a list of features and functions in order of importance to them. The team's prediction that "discoverability" would be the most important feature to employees was correct: 69% of workshop participants cited it as one of their three most important features for the new intranet. Following is the complete list of important features

and functions that participants cited (in order):

- Discoverability: improved search and navigation

- Employee contact lookup/information

- Policies and procedures

- Personalization: targeted content and favorites

- Mobile/tablet access

- Company news, events, and announcements

- Online forms center: digital forms for requests and tracking

- Employee profiles: extended employee information, similar to what is offered on LinkedIn

In addition to features and functionality, the team also wanted to understand the content that mattered most to Con Edison and O&R employees. Item six on the placemats asked employees to rank the departments in order of importance, based on the content that matters most to them. Not surprisingly, HR ranked number one overall, and was the top choice of 78% of employees. Following is the complete list of prioritized content (in order):

- **HR:** benefits, compensation, employee wellness

- **Learning and Inclusion:** talent management, workforce planning, learning, office of diversity, and inclusion

- **Corporate Affairs**: employee communications

- IT

- **Utility shared services:** corporate security, emergency management, facilities, and R&D

- Environmental Health & Safety

- **Legal:** business ethics and compliance

## Personas

To support a human-centered design approach, the team created four detailed employee personas:

- **Denise the Desktop Employee:** Denise is a long-time employee and cares a lot about the organization and the direction in which it is going. She has been using the intranet since she joined the company and utilizes it daily.

- **Frank the Field Employee:** Frank has been with the organization for most of his career. He spends most of his time out in the field and is only in the office for safety meetings and training. Training is a big component of Frank's career, as it is required to continue growing his career within the organization.

- **Nicole the New Employee:** Nicole is a new employee, but this isn't her first job out of college. Raised in a digital world, Nicole is a digital native. She is always connected, has

a lot of energy, and enjoys a collaborative and challenging workplace. She is constantly looking for opportunities to learn new things and grow her career.

- **Chris the Content Author:** Chris spends time creating and managing department site content. He serves as the link between his department and the rest of the organization but is also responsible for many other things outside of his department's content.

These profiles brought the motivations, behaviors, interactions, needs, and goals of typical intranet users to life. The team created and validated these personas during their up-front discovery phase through a mix of employee interviews and observations. Then, the personas were used throughout the design, build, and rollout phases.

Features were matched to personas so the team could make decisions about the visual layout, IA, backlog priorities, and security and permissions. Using human-centered design, rapid prototyping frameworks, and lean Agile product development principles, the Con Edison team, along with its vendor, West Monroe Partners, defined and implemented a well-designed intranet for all Con Edison employees, as well as for the employees of some of its affiliates.

## Designing Navigation

Navigation was a top priority for both the organization and for employees. After understanding which content the employees wanted or needed to navigate to most often, the team started to think about how best to structure the IA and site navigation. Through this process, it identified the most important content items:

- *Benefits & Pay*: Employees want quick access to information such as paychecks, benefits summaries, tuition aid, corporate discounts, and wellness resources.

- *Career & Training*: Career and training are priorities for Con Edison and its employees. Accordingly, employees need to be able to easily find and access information and resources related to career planning, performance management, and required training.

- *Job Tools*: An intranet should empower employees to do their jobs better, so this section includes content such as expenses, frequently accessed forms, IT HelpDesk information, and the employee directory.

After identifying the highest-level navigation priorities (level 1 navigation), the team utilized card-sorting workshops with content owners to help build out the remaining items (second and third level links) that would ultimately make up the megamenu global navigation.
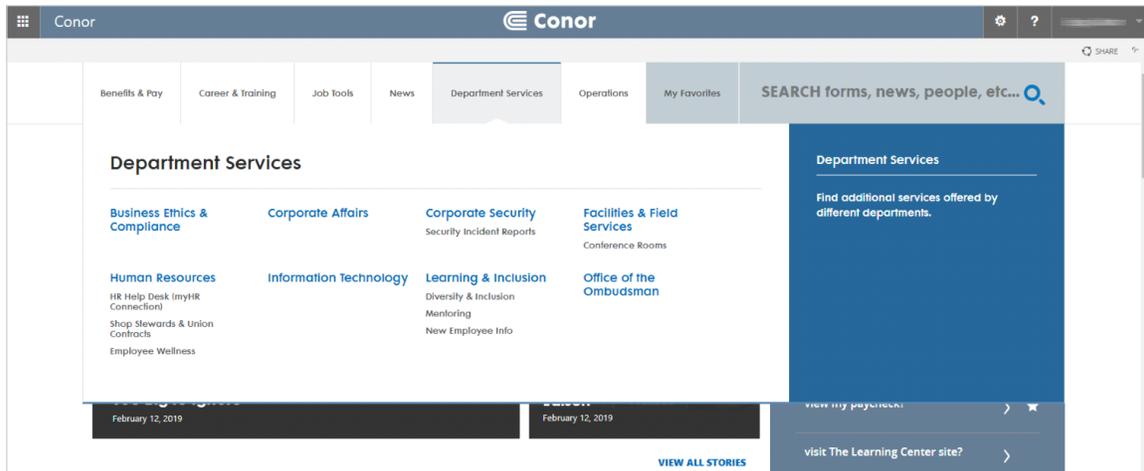
**Image 64. Con Edison Intranet Megamenu.** Each level 1 link in the megamenu/ global navigation has a description that displays in the blue pane on the right. Level 2 entries can link to sites or pages, or be static headings. Level 3 entries are all links. *ConEd_13_Mega-menu-global-navigation-live.png*

## Adoption/Buy-in

One key focus of the Conor project was change management. The project team viewed adoption and buy-in through several lenses. First, it focused on training the content managers and authors who use the site daily to manage their pages, update links, and add new content. For this group, the team conducted in-person training, held office hours, and developed detailed training guides and quick reference guides. Next, the team focused on the Corporate Affairs function, which updates the homepage daily by adding news articles and alerts, and updating quick links. Again, the project team held office hours, conducted training sessions, and developed detail training guides and quick reference guides. The third area of focus was the general employee population, which accesses Conor to perform tasks that range from looking for benefits information to finding conference rooms.

Following are some of the team's successful employee communication tactics:

- Close to the release date, the team sent emails to highlight changes and how to find frequently accessed content/links.
- The team created quick "how to" videos to help employees access important information and use new features; it posted these to both the old and new sites, as well as linked to the videos in employee-wide emails.
- It established a "change champions" team that included a representative from every department. These champions supported training and answered questions; on the day of the launch, change champions wore shirts that said, "Ask me about Conor."
- The team set up a table in the main lobby of the headquarters building during the launch

with large screens that showed the new site and had a team member ready to answer questions and conduct quick demos.

- It communicated the changes to employees through presentations at monthly office staff meetings and weekly safety stand-up meetings.

| Working with Outside Agencies | |
|---|---|
| Agency | Project Role |
| West Monroe Partners LLC (WMP)<br>A full-service business and technology consultancy | Partnered with Con Edison to design and build Conor; WMP responsibilities included:<br><br>• Provide the overall project approach including discovery, design, and implementation methodology using Agile and human-centered design frameworks<br>• Facilitate development of employee personas<br>• Lead UX design of the site prototypes<br>• Work with Clique Studios to create visual designs that reflect the Con Edison brand<br>• Implement the custom design and build<br>• Facilitate change management and provide roll-out support |
| Clique Studios<br>Digital design and development | • Create high-fidelity visual designs<br>• Provide design expertise and an outside viewpoint to assist with the visual direction of the intranet redesign<br>• Work closely with WMP and Con Edison's creative/design team to iterate on design feedback and modifications |

## Creating a Deep Partnership

Many companies take on agency partners to contribute to an intranet design or redesign project. Con Edison and its agency partner, West Monroe Partners, worked synergistically to create the new Conor. The Con Edison team utilized West Monroe's DEEPEN (Define, Empathize, Envision, Plan, Enact, and Nurture) methodology throughout the project. This methodology—rooted in human-centric design, value realization, and data-driven decision-making—transforms customer/employee experience across people, process, and technology. It dictates that, when designing an experience, it is critical to establish a viewpoint and understand what matters to those impacted. Thus, the Define, Empathize, and Envision phases of DEEPEN provided the team with insight that ultimately informed the remaining phases and the new intranet's implementation.

West Monroe worked hand in hand with Con Edison to ensure that the new intranet not only worked well, but also was easy to use. The agency led content strategy sessions to assess, reorganize, and refine the existing site content to allow for a clutter-free environment. The agency also created a governance structure and outlined permissions for various content managers and authors, which minimizes the need for new page creation and avoids content duplication.

To ensure a smooth launch, West Monroe developed a change management strategy that included detailed communication and training plans for content authors, Corporate Affairs, and general employee users. The result of this tight integration between internal and external resources is a modern intranet and collaboration platform (SharePoint) with the latest responsive web design technologies and principles.

## GOVERNANCE

The Con Edison Corporate Affairs group has always owned the corporate intranet; it continues to do so and is responsible for its content and the product backlog.

As a sponsor and primary partner in the new intranet development effort, it was able to build a solution that meets the needs of both content providers and the employee audience. A new governance model created initial alignment challenges, as new content providers had to adjust to more rigorous requirements. The benefits reaped are quickly evident, however, as users are now able to locate information more easily.

| Intranet Team Responsibilities | |
|---|---|
| Role | Responsibilities |
| Corporate Affairs Web Team | • Champion the platform<br>• Prioritize future features and functionality<br>• Develop new features for maintenance releases<br>• Provide level 2 support for employee inquiries related to the intranet that are escalated from the help desk |
| Corporate Affairs Editorial Team | • Author and maintain the content on the intranet homepage, including news articles<br>• Manage department content owners |
| Con Edison IT | • Maintain and support the SharePoint Server 2016 environment<br>• Assist with content migration<br>• Provide support with Office 365 and Microsoft Flow |
| Department Content Owners | • Author and maintain the content on their department sites<br>• Manage additional content owners and review content |
| Con Edison Help Desk | • Provide level 1 support for intranet-related employee inquiries |

## URL AND ACCESS

| Access Information | |
|---|---|
| Item | Status |
| URL | https://conor/ or simply "conor/" |
| Default Status | Group Policy sets Conor as the default homepage for Internet Explorer, and internal DNS records exist to allow users to simply type "conor" into the address bar to get to the site. |
| Remote Access | Currently, Con Edison users must be authenticated within the VPN to access Conor; however, there are plans to expand remote access capability in 2020.<br><br>Field workers can access Conor on compact, durable laptops. |
| Kiosk Access | Employees can use kiosks to access the intranet when computers are unavailable. |

## TIMELINE

| Project Milestones | |
|---|---|
| Milestone Date | Milestone Description |
| December 2015–January 2016 | Intranet visioning project |
| November–December 2016 | Intranet platform comparison and selection project |
| June 2017—February 2018 | Conor—Release 1<br><br>MVP functionality rolled out to Con Edison employees |
| February—May 2018 | Conor—Release 2<br><br>Minor feature enhancements<br><br>Expanded rollout to O&R employees |
| July—December 2018 | Conor—Release 3<br><br>Major new features based on feedback<br><br>Bug fixes |
| Overall redesign timeframe: Approximately 3 years | |

## CONTENT MANAGEMENT AND GOVERNANCE

### Content Strategy

Content was an important part of the Conor project. The West Monroe team and Con Edison Corporate Affairs conducted content strategy sessions during the design phase. Having just completed the content assessment and employee discovery, the project team understood what was working and what was not, so the goal of these sessions was to understand the baseline expectations for content: content types, voice and tone, publishing guidelines, and how content was scheduled. The team also wanted to understand the current governance model for working with department content managers and authors.

These content strategy sessions were conducted in two-hour blocks; later, the team held 1-2 hour weekly meetings with department content managers and authors to explain the content strategy and work with them to develop their content in this new context. The team also used these sessions to explain the employee personas and system features so that participants would be ready to provide ongoing support for their department's content updates on the new intranet.

## Reducing Content

Another critical component of the content strategy was to find ways to reduce the amount of content. The reduction of content from Con Edison's previous intranets—CEintranet and ORUintranet—to Conor was substantial: from a total of 1,200 pages to less than 120 pages. The project team used the following process to reduce content and develop new content in a structured, methodical manner:

1. **Content assessment:** The content assessment was an inventory of what existed on the old intranets. The team reviewed this and asked department content managers to review it and make recommendations about which content should be kept, updated, or eliminated. The team also looked at site analytics to see which pages employees visited most frequently so it could make informed decisions about how to prioritize content and avoid losing anything critical.

2. **Content strategy:** Developing the content strategy meant defining how content would look in the future, including making sure that it was written and organized as simply as possible.

3. **Content development:** Through extensive conversations with content managers, the project team convinced them that most of the content was outdated and/or irrelevant and could be eliminated; the remaining portions would be rewritten and ported over to the new site. The team also developed a plan for how content managers could enlist authors to help write the new pages, while team members assembled the content architecture into a new department template. The project team's copywriter reviewed content to ensure adherence with content guidelines.

4. **Content migration:** As the project team began assembling Conor in the test environment, it migrated documents from the existing intranets (using ShareGate for CEintranet and manual migration for ORUintranet). The project team ran this migration based on decisions that the content managers had made about their documents during the assessment process. The content managers then verified all necessary content and organized it into folders.

5. **Content authoring:** The final step involved authoring new and updated pages directly in Conor. Content managers performed nearly all of the authoring. There was no automated migration; this ensured that content managers and authors could see their content in Conor and learn how to manage it, as they would be required to do so going forward. The project team assisted with authoring and updating all relevant hyperlinks and imagery for departments that had many pages.

## A Hybrid, Department-Based Publishing Model

The depth of Con Edison's content management and governance structure is explained in detail in the sections that follow, beginning here with an explanation of the company's publishing model.

Con Edison employs a **hybrid publishing model** under which department content managers are responsible for adding, updating, and deleting the content in their department site template. This plays out as follows:

- Each department receives a template to build its site, along with a set of generic content pages to support its content.

- Each department is engaged in a process of discovery, content mapping, and content migration with the intranet team to understand and assess the content to be migrated to or created for its Conor site.

- Editorial content authors are assigned to help department content managers understand the content guidelines and provide them with insights and resources to ensure their success.

- The Editorial Team content author manages changes and additions to the department's general content pages. This ensures consistency and clarity, and also ensures that authors follow web writing best practices. Changes require approvals and are at the discretion of the Editorial Team content manager.

## Content Development and Oversight

| | |
|---|---|
| Contributors | For sites such as HR and Benefits, there are two content managers (one for Con Edison and one for O&R) and various other authors who serve as contributors. Only a few departments that have a site on the intranet have internal communications representatives who manage the site and content as a part of their day-to-day job function. All other departments appointed content managers and authors as a part of the project's discovery phase. |
| Contribution | The project team worked hard to encourage contribution and collaboration across the content teams. In most cases, the content groups met in small teams with the intranet team to develop and fill out templates that would form the site homepage. During these meetings, the intranet team trained the content teams on features such as How Do I… and calls to action. Once the content teams completed the templates, the intranet team created a spreadsheet of all current and old content and the content teams decided whether to migrate, update, or delete it. The new content pages were drafted by content teams and approved by Corporate Affairs.<br><br>Many content teams spanned multiple office locations. To encourage collaboration, the intranet team traveled to these offices. Since the launch, the team sends a monthly analytics report on the site and assists in refreshing or adding content or answering questions. In addition, on a quarterly basis, the content managers are invited to a meeting with the intranet team to talk about best practices. These are highly productive discussions. |
| Content Management | When a department wants to spin up a new site, it works with the intranet team through the onboarding process and governance structure. It archives old content, drafts new content, and then goes through an approval process, with Corporate Affairs giving the final sign off. Content mangers cannot add new pages to their sites; only Corporate Affairs has permission to create new pages.<br><br>The Corporate Affairs team performs a quarterly audit to ensure that features are working properly, as well as to make sure there are no broken links on the site. During this audit, Corporate Affairs also checks that content is up to date and accurate. That team also meets frequently with content mangers and authors to answer questions and assist with updating or adding content. The intranet team is in frequent communication with the content teams, ensuring a strong relationship and successful collaboration. |

| Training | Training is part of the content management workflow. The intranet team trained content managers and worked with them to launch their sites. This included train-the-trainer sessions, as well as follow-up one-on-one training. The intranet team also held office hours and conducted additional training sessions for those interested in using more advanced features on their sites. |
|---|---|
| | In addition, the team developed detailed training documents that contained screen shots and step-by-step instructions for each site template, feature, and content type, and developed one- to two-page quick reference guides for frequently asked questions. |
| Maintaining Quality | Corporate Affairs, the intranet team, and department content managers help improve content on Conor by reviewing all pages and documents on an annual basis for accuracy and freshness. Each content page includes a box with a name, photo, email, and phone number for the page's content manager. This lets employees provide direct feedback on content as they see it. Corporate Affairs typically receives the feedback from the homepage content, as it is the site's most prominent, most read, and most updated page. |
| | Also contributing to the team's commitment to maintaining quality is an intranet site audit that is performed at least quarterly. This ensures that all departments are regularly publishing content and that all forms are up to date. The UX lead runs a report indicating the dates of the most recent departmental site updates and distributes the report at the quarterly site audit meeting where the intranet leads, editorial content managers, and editorial content authors can assess and subsequently work with the department content managers and authors to address any necessary updates and revisions. |

| Content Governance Structure | |
|---|---|
| **Role** | **Activities and Responsibilities** |
| Executive Sponsor | • Ensures overall success of the new intranet<br><br>• Acts as the final arbiter on all content and UX decisions |
| Intranet Leads | • Owns new intranet as an Employee Communications Platform<br><br>• Guides platform growth and changes at a strategic level<br><br>• Makes decisions and guides team<br><br>• Heads the Intranet Governance Committee<br><br>• Has publishing access rights to all site pages, including homepage and department pages<br><br>• Has authority to create new pages<br><br>• Calls for and runs meetings for quarterly intranet audits |
| Editorial Content Manager | • Responsible for all site content and manages the Editorial Team content authors<br><br>• Executes content governance plan<br><br>• Approves draft content, as necessary, and makes it visible to all employees<br><br>• Has publishing access rights to all pages throughout the site, including homepage and department pages<br><br>• Authorized to create new pages |
| Editorial Content Authors | • Responsible for all Employee Communications content<br><br>• Writes crisp, engaging, factually correct content that follows established editorial guidelines<br><br>• Updates information regularly to attract/engage/retain audience<br><br>• Supports and coordinates with department content authors to ensure that governance plan is upheld<br><br>• Presents regular reports on department site updates at Intranet Governance Committee meetings<br><br>• Has publishing access and rights to all pages throughout the site, including homepage and department pages<br><br>• Creates new pages only with permission from editorial content manager |

| | |
|---|---|
| User Experience Lead | • Responsible for UX<br><br>• Executes Content Governance Plan to ensure that the intranet is running smoothly and efficiently<br><br>• Tracks system's back-end analytics to determine readership patterns (click-throughs, etc.) and overall employee response<br><br>• Runs regular reports related to department site update frequency<br><br>• Acts as point person for system design and subsequent feature development<br><br>• Has publishing access and rights to all pages throughout the site, including homepage and department pages, but focuses more on site administration and design than on actual content creation and management |
| Department<br>Content Manager and Authors | • Makes content updates within their specific department site<br><br>• Serves as the department point of contact for editorial content authors<br><br>• Coordinates inputs or updates from department content authors<br><br>• Follows Content Governance Plan<br><br>• Has publishing access and rights only for specific department sites<br><br>• Has no high-level site access or ability to create new pages; cannot change design |
| Intranet Governance Committee | • Meets quarterly to ensure site updates are being implemented regularly by department content managers and authors<br><br>• Makes high-level decisions regarding intranet's current and future vision |
| Viewers | • Consumes and accesses content to influence future iterations<br><br>• Does not have any content governance responsibilities |

## Content Guidelines Example

The content guidelines below were developed as part of the content strategy for Conor and are contained in the company's publication: *Conor Content Playbook & Guidelines for Department Content Managers & Authors*.

With your help, we have a plan for having great content throughout Conor.

**What is great content?**

- Important or relevant to all employees
- Has an owner
- Follows content guidelines and governance
- Enhanced by design and technology

**How you can help with great content:**

- Know the content types
- Follow the content guidelines
- Be aware of voice & tone
- Understand governance and publishing procedures
- Assist with search engine optimization

**What does belong on Conor?**

- All employee-focused content (benefits, compensation, training, etc.)
- Professional, relevant, accurate content that follows established editorial guidelines

**What does not belong on Conor?**

- Rambling, incorrect, misspelled, political, unprofessional language that reflects poorly on the company
- Text that obfuscates or confuses readers; this creates a bad experience and undermines trust/confidence in Conor

**Guidelines for consistent voice and tone throughout Conor**

- Content voice is the unified, unique, and overall recognizable sound that should be present throughout the copy on Conor.
- Our voice and tone embody our "personality"—Conor text can be described as confident, trustworthy, and approachable; not wavering, vague, or condescending.
- Copy should be written in second person (i.e. direct address to employees, using you/your) to be direct with readers and to answer questions or give helpful direction.
- Content Authors/Managers should always strive for a positive and professional tone whenever writing copy for Conor.

- Here's an example, via a brief reminder for Benefits Open Enrollment:

  - "Open Enrollment is Coming! Learn About Your Benefits—With Open Enrollment less than a month away, attend one of the upcoming Benefits Fairs to learn about your options."

  - The content is friendly and informative and gives clear, detailed direction; it's important to note that a favorable voice adds to a positive image and perception of the company.

**Department Content Manager Expectations:**

- Provide a portion of their time and department knowledge to help own the intranet content

- For this project, devote 25% of their time to review content, rewrite when necessary, map to new department template, and help migrate it with help from the Web team

- Understand the content strategy and tools to make sure content is updated, accurate, concise, and helpful on their department site and pages

- Collaborate with Editorial Content Managers and Authors (Corporate Affairs) to develop polished, informative, and professional-sounding content

- Responsible for their department's content and will get ongoing support from Editorial to help write and manage page content

## TECHNOLOGY

### A Hybrid Approach to Development

The project team adopted a hybrid waterfall–Agile approach to development, starting with a discovery phase to identify employee needs, presumed features, and content. It then moved on to a design phase, where it made big-picture design decisions, such as whether or not to use one intranet instead of two, the layout of navigation elements, design page layouts, and a site hierarchy. After the team determined what it could accomplish in a fixed development timeline, it went into an iterative build and test mode. These iterations were generally two-week sprints during which the team reached final detailed design decisions, configured SharePoint, developed and deployed code, and tested the site functionally to make sure it worked as expected. At the end of the sprint, the West Monroe team shared a demo with Con Edison project leads to make sure it worked as they expected; it then conducted separate user acceptance testing (and training) so that Con Edison employees could see the functionality, as it was ready, and provide feedback. The Agile approach worked well for the project team (Con Edison and West Monroe), as there were occasions when leadership wanted to see a feature in an upcoming release, and this approach let the team accommodate those requests.

| Technology | |
|---|---|
| Category | Technology Used |
| Web Server Hardware and Operating System | Windows Server, IIS |
| Bug Tracking/Quality Assurance | Azure DevOps |
| Design Tools | Sketch, InVision (comps), Axure/Axshare (wireframing) |
| Site Building Tools | Visual Studio Professional 2019 |
| Content Management Tools | SharePoint Server 2016 |
| Search | SharePoint Server 2016 Enterprise Search |
| Dev Stack | AngularJS, CSS/HTML<br>Angular, Bower, NPM, Git |
| Workflow Engine | Microsoft Flow |

## Choosing a Platform

Before beginning the initial design phases, the project team completed an intranet platform assessment. This assessment was grounded in a shared understanding of the vision statement and future-state intranet objectives.

Once those baseline objectives were defined, the project team scored potential platforms based on three criteria: user needs and functional capabilities, technical implementation capabilities, and user adoption and experience. Each of these three broad categories had 15 or so subcategories, which the team scoped at a level of granularity that allowed it to measure data points without being too abstract. For example, under technical implementation capabilities, the team looked at subcategories such as scalability, security, monitoring, and maintainability. In total, the assessment effort weighted and scored nearly 50 metrics.

Due to unique infrastructure and security requirements, the project team also explored hybrid solutions between platforms, which involved using Platform A for the front end and Platform B for the back end. Ultimately, based on its data-driven due diligence, the project team believed that SharePoint offered the best solution for Con Edison's requirements.

## MOBILE

Conor is accessible only from authorized devices while on the Con Edison network. Field employees use a Toughbook with a VPN network connection to access the intranet. Given this architecture, the project team designed the intranet primarily for desktop users, but also ensured it would support the Toughbook's native screen resolution, which is close to that of a tablet. The first release of Conor was not optimized for mobile because the necessary infrastructure is still in progress. As network security and architecture changes, the project team will reevaluate needs and add mobile support to the product roadmap.

## SEARCH

### Search Technology

Conor features a custom-branded search site powered by SharePoint's integrated search capabilities. The project team chose to use this search functionality because it's already tightly integrated with SharePoint and provides the flexibility to configure and customize search capabilities to meet business requirements.

### Filtering

When users submit a search query, they are placed into the search experience, which is a separate SharePoint site. By default, a query searches only indexed information from Conor, but the functionality features significant levers that allow users to filter out noise. Clicking *Everything* searches all indexed content from all intranets in the SharePoint farm, but users can also filter key sites in Conor, such as HR.

Regardless of how the user has elected to filter content, a sidebar enables further refinements including: modified date, author, and result type (such as news article, site, or PDF).

Given the importance of filtering and refinements, the project team iterated to get these capabilities right. The initial filters and refiners changed considerably throughout implementation. Team members periodically measured what users were looking for and how they were looking for it; they then used the data to reassess the overall configuration and experience.

### Maintaining Relevancy

The project team reviews and evaluates metrics on a regular basis using SharePoint search analytics, Google Tag Manager, and Google Analytics. Oftentimes, team members find that they need to create additional query rules ("best bets") or change keyword matching for existing query rules. Using analytics, they look at popular pages and sites and create a new query rule if one does not exist.
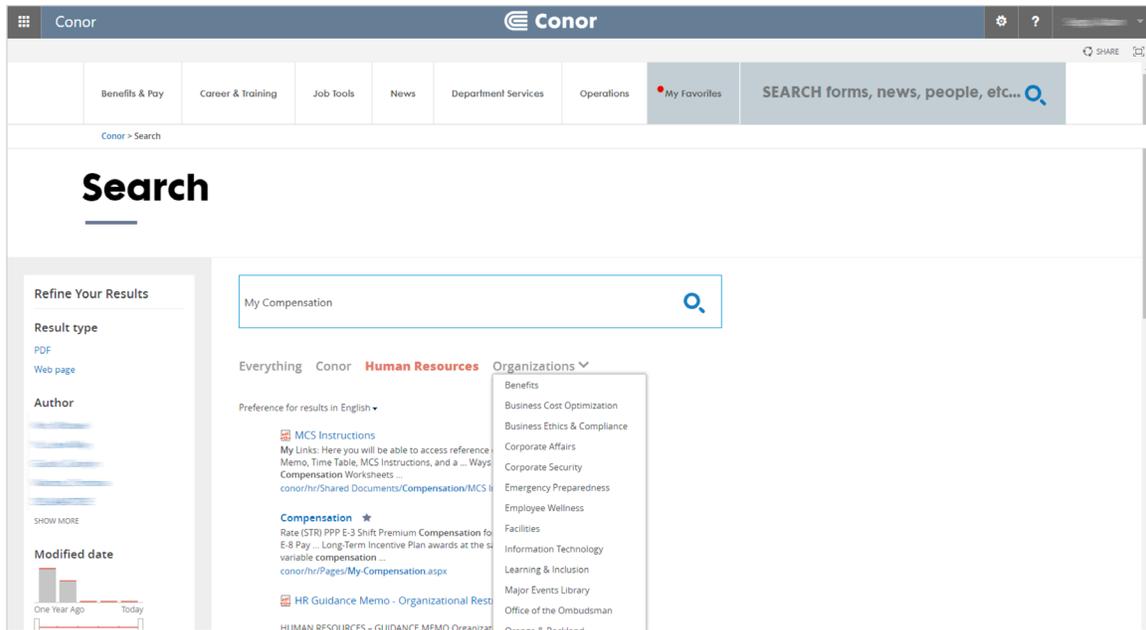
**Image 65. Con Edison Intranet Search.** Conor features a custom branded search site. While on the homepage or any subsite, the search box expands when typing to fill the length of the global navigation. Some Conor subsites let users limit the search to their specific subsite by marking a checkbox. The search page also contains a drop-down of all the subsites that are selectively searchable, and it contains refiners for finding specific information. *ConEd_14_Search-live.png*

## ROI

The Con Edison team measures success through a variety of measures, including the following.

- **Cost Savings:** Launching the redesigned intranet produced two key monetary results:
    - By reducing the time employees spend locating information and tools they need on the intranet, Con Edison saves approximately $285,000 per month.
    - The new Conor will save $640,000 across Con Edison and O&R by establishing a standardized template and streamlined process for establishing new department sites.
- **Adoption and Use**
    - The new intranet has achieved a high adoption rate and now serves 76% of employees daily.
    - Search utilization has increased by 50%, enabling greater employee self-service and engagement.
- **Satisfaction**
    - With the launch of the new intranet, employee satisfaction increased by 30%,

leading to happier and more engaged employees. To determine this data point, the team asked employees a question during the interviews/workshops so they could understand the existing level of satisfaction with the old intranet. The team then asked employees the same question after the new intranet was live for several months, and the score improved from 4.8/10 to 8/10.

- Employees can now quickly locate the best person to help them with their needs because Conor gives them access to a standardized list of key contacts on the department template.

- Simplified content and a decrease in page content from 1,200 to 120 pages have improved employee efficiency.

## LESSONS LEARNED

The Con Edison team learned a valuable lesson when it left a popular feature from the old intranet off the new one. In the first release of Conor, the project team purposely did not include the previous intranet's *hot sites* feature, which was a drop-down menu of 100+ items. This menu let users navigate to popular destinations in the digital workplace instead of using the global menu and navigation, which had become obsolete due to a lack of site updates. Instead of offering *hot sites*, the team designed and built the new IA and global menu in a way that it felt would adequately replace that feature. Following the first release, however, the team received significant feedback from employees who missed the *hot sites* functionality. Therefore, the team gathered additional requirements for a second release and ended up designing and developing a favorites feature that allows employees to create a customizable list of links. While this was not exactly like the old *hot sites*, it built on that functionality and gave employees an improvement over what they had before. The lesson learned here? It's important to listen to users. But the follow-on lesson is that sometimes you have to listen and then expand on what they're asking for.

### Best Practices

- **Consider the needs of all employees.** "In this case, considering employees outside the various office locations (e.g., field personnel) helped in designing and launching an intranet that meets the needs of all 15,000 employees, not just those at headquarters."

- **Engage employees.** "The company-wide contest to name the intranet generated a lot of excitement and helped employees feel like they had a stake in making the digital workplace their own."

- **Design and build iteratively.** "Iterative development is critical to success, so leverage the Agile methodology to design and build the intranet in an iterative manner. Present demos to key project sponsors frequently, seeking feedback so changes can be incorporated into the timeline. Conducting iterative user acceptance testing sessions after each sprint also ensures the content owners who will use the intranet have plenty of time

to understand the system, as well as allows them to provide their feedback directly to the project team."

- **Spend time on content.** "Spend the necessary amount of time required to conduct a detailed content assessment of the existing intranet, and do not migrate all content to the new intranet. Use the opportunity to archive, delete, and consolidate existing content, and create new content where applicable. Define a content strategy/governance plan to improve content searchability and ensure there is accountability for keeping content up to date."

- **Plan for change management.** "Proper change management is critical to project success. It should be started at the beginning and continue throughout the project, all the way through launch. And don't underestimate the amount of time this work stream will require. Engage employees early on, communicate the upcoming changes, and continually check with employees after launch to understand what is and is not working—and act on it accordingly."

- **Personalize for a better UX.** "Leverage the unique characteristics from each of your personas to determine what content on the intranet should be personalized to offer a richer, more streamlined user experience for employees."

- **Find influential allies.** "Major intranet redesigns require support and participation from influential individuals across the organization. Don't underestimate the political cachet needed to get alignment and help drive things forward on a highly visible intern initiative and system. Successful and influential leaders should approach various departments and communities to understand their specific communication and content goals with employees so that the intranet can be a desirable platform worthy of investing time and resources to bring it to life."

# Dynacare

## OVERVIEW

### COMPANY

Dynacare is one of Canada's largest, most established health solutions companies. It serves healthcare solutions to more than 10 million Canadians, offering services that include essential medical testing, insurance solutions, corporate wellness programs, advanced genetic testing, and digital health solutions.

**Headquarters:** Brampton, Ontario, Canada

**Company locations:** 200+ laboratories, health service centers, transport depots, and corporate offices

**Locations where people use the intranet:** Canada

**Annual revenue:** N/A

### THE INTRANET

**Users:** The intranet's 3,000 users range from clinicians and laboratory technicians to couriers, frontline staff, and those in operational and departmental roles such as HR, customer service, maintenance, finance, and quality assurance. Users share core demands for items such as policy documents, company news and insights, and HR and finance information; however, there are also distinct intranet use cases relevant to only some user types or departments. For example, specialist staff uses the intranet on desktop devices to locate subject matter experts to collaborate on healthcare challenges, while couriers rely on mobile access to coordinate operations with their team and stay aligned with company objectives.

**Mobile approach:** Responsive web design and native mobile app

**Technology platform:** Unily Digital Experience Cloud

### TEAM

**The core project team** directly involved in the planning, design, and launch of ConneXe comprised five team members: Mario Fantozzi, Business Owner/Project Lead; Tricia Gill, Project Manager; Sandra Bhikram, Business System Analyst; Mara MacKay, Project Coordinator; John Neves, SharePoint Specialist.

Some of these team members also took on additional roles during the project phase as follows.

**Design:** Mario Fantozzi

**Leadership:** Naseem Somani, CEO; Mario Fantozzi, IT; Tricia Gill, IT; Sandra Bhikram, IT; Arun Thomas, IT; Donna Pascal, HR; Scott Hickey, Corporate Communications; Andrea Price, Corporate Communications; Ingrid Huss, HR; Ana Andreasian, IT; Peter Parsan, IT

**Development:** Mario Fantozzi, IT; John Neves, IT; Sandra Bhikram, IT

**Support:** Mario Fantozzi, IT; John Neves, IT; Melanie Wells, Branding; Lissette Edward Copperi, Branding; Andrea Price, Corporate Communications–Content; Andrew Munday, Corporate Communications–Content

# INTRANET TEAM

## DYNACARE



**Arun Thomas**
Vice President, Information
Technology and
Chief Information Officer

**Mario Fantozzi**
Director Integrated Enterprise
Planning and Solutions

**Andrea Price**
Director, Corporate
Communications

**Andrew Munday**
Coordinator, Corporate
Communications

**Scott Hickey**
Vice President, Corporate
Communications and
Public Affairs

**Donna Pascal**
Vice President, Human
Resources and
Talent Management

**Ingrid Huss**
Director, Total Rewards
and HR Operations

**Sandra Bhikram**
Business Systems Analyst

## UNILY

**Emma Horder**
Customer Success Manager

**Jason Liang**
Consultant

**Paul Seda**
Consultant

*Dynacare team members shown here* (top row, left to right): Arun Thomas, Mario Fantozzi, Andrea Price, and Andrew Munday; (second row, left to right) Scott Hickey, Donna Pascal, Ingrid Hess, and Sandra Bhikram. **Unily team members shown here** (left to right) Emma Horder, Jason Liang, and Paul Seda.

## HIGHLIGHTS ABOUT THIS WINNER

Collaboration is at the heart of Dynacare's approach to healthcare, and its ability to share expertise internally underpins its success as a leading provider in Canada. Dynacare team members value and leverage each other's ideas, expertise, and experience to provide the best healthcare possible. The company's intranet, ConneXe, is a seamless destination that connects employees from anywhere, anytime, and on any device—to drive higher levels of collaboration, simplify access to information, and ultimately improve each day for employees.

Interesting features include:

- **Quick edit menu:** The quick edit menu is available only to ConneXe administrators, and provides the option to edit content on any intranet page directly from the front end, instead of through the CMS. This helps users make simple edits faster and easier.

- **Surfaced employee wellness and recognition:** ConneXe promotes the health and wellness of the whole person, not just the part employed at Dynacare. With multiple areas dedicated to helping employees be inspired at work, grow their careers, stay healthy, and thrive in life—as well as appreciate one another—the Dynacare intranet demonstrates what it means to really care for employees.

- **Gamified profile:** Because finding information about colleagues in the healthcare setting is so critical to collaboration, ConneXe motivates users to keep their profile data complete and tidy through a gamified profile completion experience.

- **French and English:** Users can easily switch between languages through the profile settings menu, which can be accessed from any page using the global navigation. The site is fully responsive in both Canadian French and Canadian English.

- ***Who Does What***: Keeping track of what other departments do, especially in a healthcare organization, can be challenging. But ConneXe makes this simple with its *Who Does What* page. The page clarifies each department's organizational role and shares important information about both the department's senior leadership team and conversations going on within the department, as well as offering links to tools, applications, and documents related to the department's specific business area.

## BACKGROUND

In 2015, Gamma-Dynacare formally changed its name to Dynacare, repositioning itself as a health solutions company. This new identity spoke to the company's intention to expand its scope within the changing Canadian healthcare landscape.

The company required an aggressive digital transformation strategy to support its ambitious growth plans, part of which involved implementing a new, more powerful intranet platform that could support collaboration, communication, and cultural goals.

## Goals

The intranet that resulted from this initiative, ConneXe, was built around four pillars:

- **Share knowledge:** Provide employees with easy access to organizational updates, policies, forms, and more.

- **Provide access to experts:** Give employees tools that let them search for and find colleagues who have expertise in different areas, including different scientific disciplines, IT, and HR.

- **Be a gateway to all systems:** Allow employees to access all the apps and tools they use to do their best work in one place, using single sign-on.

- **Improve collaboration and productivity:** Enable employees to communicate and collaborate more easily with colleagues, both within departments and across the organization.

## Challenges

Key project challenges included the following.

- **Full multilingual support:** When the team discovered that not all of the widgets included in the chosen intranet platform had multilingual capabilities, it had to find another way to provide a true multilingual UX for both the English- and French-speaking employee communities.

- **Office 365:** The company had an existing investment in Office 365 that had to be leveraged in the new intranet.

- **Seamless UI regardless of user roles:** The design team had to figure out how to provide a seamless experience for both union and non-union employees, specifically on the *Benefits* page (which is different for each group). And, along with that, the team had to find a way to ensure proper access for both groups through Active Directory groups functionality.

## Digital Workplace

The Dynacare vision was to have ConneXe be at the center of the digital workplace—a digital destination where employees can start their day and find the tools they need to do excel at their job. At the core of this vision was the desire to create an intranet that would connect all employees, regardless of device, and thus increase collaboration, ease information access, and improve every employee's quality of life.

ConneXe was designed to be that digital toolbox, and it comprises many key features.

- **Messaging:** integrated Outlook Online email
- **Productivity:** integrated Office 365 Online productivity suite of applications
- **Document management:** SharePoint

- **Collaboration:** functional team sites and integrated WebEx

- **Communication:** a CMS, corporate news publishing capabilities, blogs, etc.

- **Business applications:** personalized user dashboard for company apps and Office 365 apps

- **Crowdsourcing:** integrated Dynacare SoapBox (an employee ideation platform) and Achievers (a rewards and recognition platform)

- **Connectivity:** integrated employee directory and rich user profiles, including a skills repository

- **Mobility:** a cloud-based, fully responsive solution accessible on any device, anywhere, any time
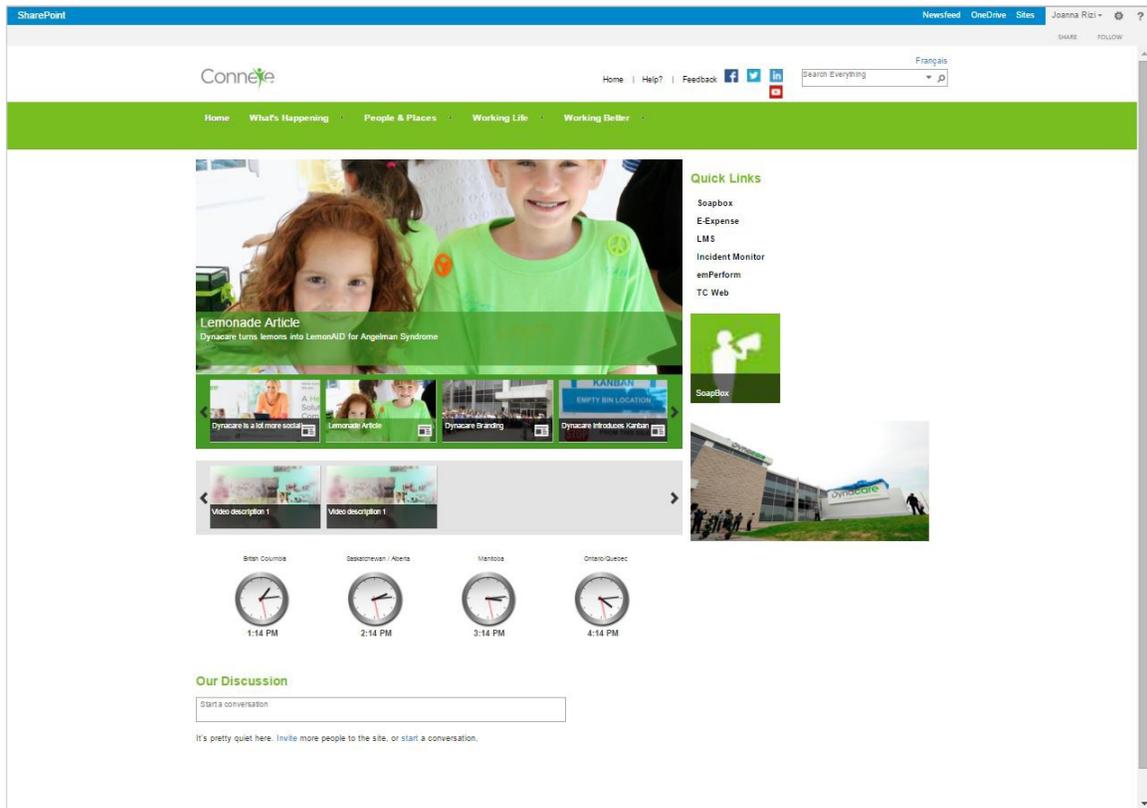


**Image 66. Dynacare Legacy Intranet Homepage.** This shows the Dynacare intranet as it looked prior to the most recent redesign. *Dynacare_01_Legacy.jpg*

# DESIGN REVIEW

## Homepage
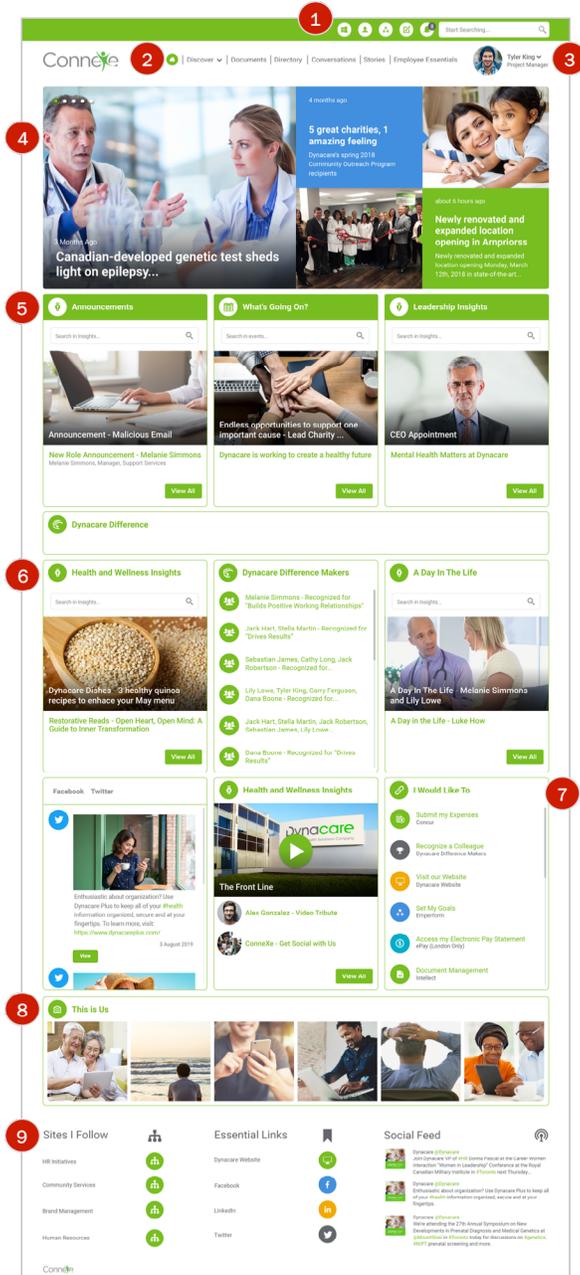


**Image 67. Dynacare Intranet Homepage.** The current ConneXe homepage is focused on maintaining open communication between Dynacare and its valued employees. *Dynacare_02_Home_Live.png*

## Homepage Highlights

The homepage's card-based design and well-organized layout, coupled with a refreshing green, blue, and white brand color palette, encourages people to engage with the latest company news and events as well as workplace wellness content. The goal is to align employees to Dynacare culture and let them know that they are each a critical aspect of it.

1. **Secondary navigation:** The secondary navigation sits right above the global navigation and contains several essential features. Search lives alongside a notifications hub, where users can access personalized notifications about new content, intranet social activity, and company announcements. The menu also lets users manage settings for their notifications, which not only display on the desktop version, but also as push notifications on ConneXe's mobile app. On click, an apps and tools icon displays a menu of personalized applications and useful business tools to give employees everything they need to do their best work from one launching point. The personalization icon allows users to select from topics and themes that are most relevant to their jobs. Once topics are selected, related content appears in their feeds across the intranet. The icon with three circles allows users to follow any colleague, social channel, site, or page on the intranet. After following, employees receive helpful notifications about associated activity and updates. This feature helps employees fine-tune their updates to stay better connected. Finally, the quick edit menu icon allows content managers to create and edit content directly from the front end, without ever having to navigate to the CMS.

2. **Global navigation:** ConneXe's global navigation is labeled clearly and concisely and persists across all pages. This helps users navigate freely, without ever losing their place. It also lets them quickly and reliably return to core content and functionality, including the homepage, workspaces, a unified document center, the people directory, a hub for social conversations, an archive of stories, and employee essentials.

3. **Profile access:** A user's name, title, and professional headshot appear on the homepage and provide direct access to the full employee profile.

4. **News:** A smart-feed aggregates various content types into an eye-catching hero component, which effectively delivers the latest and greatest news to Dynacare employees. Titles stand out starkly against images and colored backgrounds, while publishing timeframes and succinct descriptions provide added clarity.

5. **Feeds:** Directly under the main hero space integrated content feeds deliver announcements, events, and leadership insights. This prominent placement above the fold ensures that these key messages are not lost amid other stories and homepage content. A bright green button invites employees to explore all of the content related to each priority area.

6. **Culture and wellness:** A clean page break offers a switch in perspective, from corporate communications to culture and wellness-focused content. This area includes a searchable

wellness newsletter, a peer-recognition section, a look at a day-in-the life of an employee, social feeds, and video.

7.  *I want to:* This simple and intuitive module grants instant access to user-centric tasks to help employees carry out their most important work.

8.  **Photo gallery:** A feed with photos from across the organization highlight happenings and happy times at Dynacare.

9.  **Footer:** Rounding out each page, the footer gives users access to followed sites and essential links, as well as the company's social media feed.

## Apps and Tools
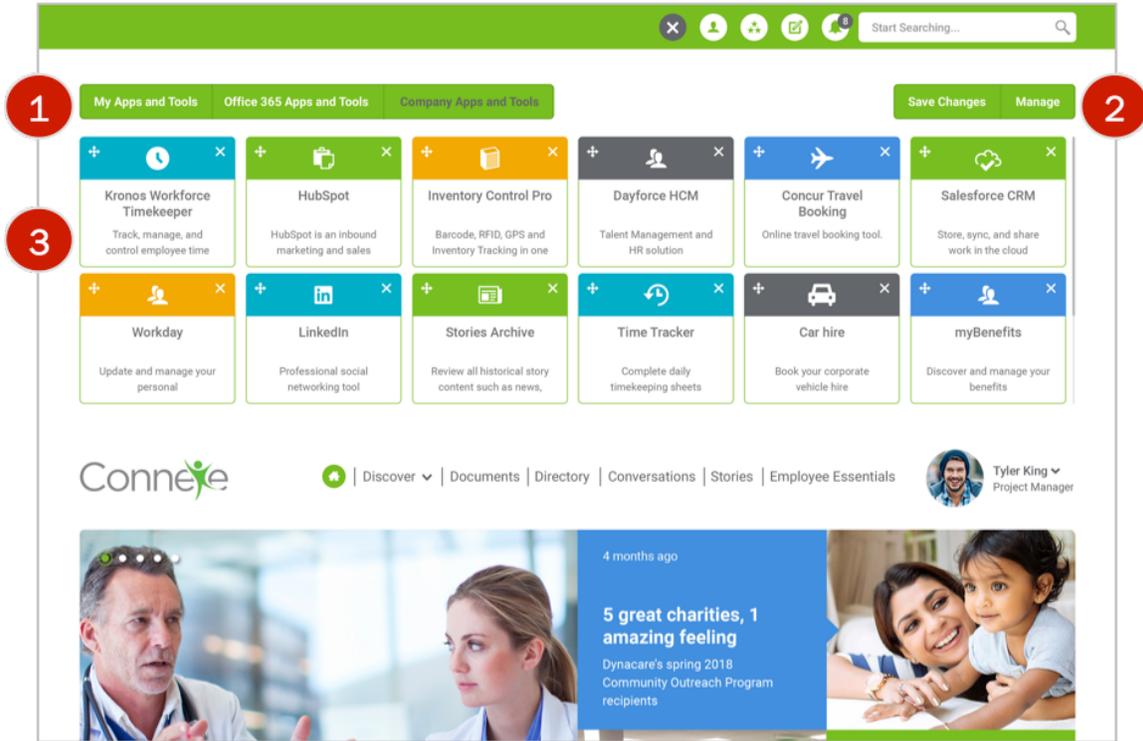


**Image 68. Dynacare Intranet Apps and Tools.** ConneXe's customizable *Apps and Tools* menu ensures that critical business tools are no more than a click away. *Dynacare_03_Home_Apps_And_Tools_Live.png*

## Apps and Tools Highlights

Apps and tools are accessible from the secondary navigation. This menu gives employees access all of their critical business systems and applications, in a single click, from any intranet page.

1. **Tool types:** Employees can use the tool-type tabs to navigate between their customized view of tools, Office 365 apps and tools, and company-specific apps and tools.

2. **Save and manage:** Changes made in this menu can be saved, which helps users avoid lost progress and wasted time when customizing their apps and tools.

3. **Tool cards:** Each application or digital workplace tool is contained in a colorful card with a visually appealing and corresponding icon. In addition to seeing the name of the tool and a helpful description, employees can also delete tools from this view or move tools around for enhanced productivity.

## Workspaces
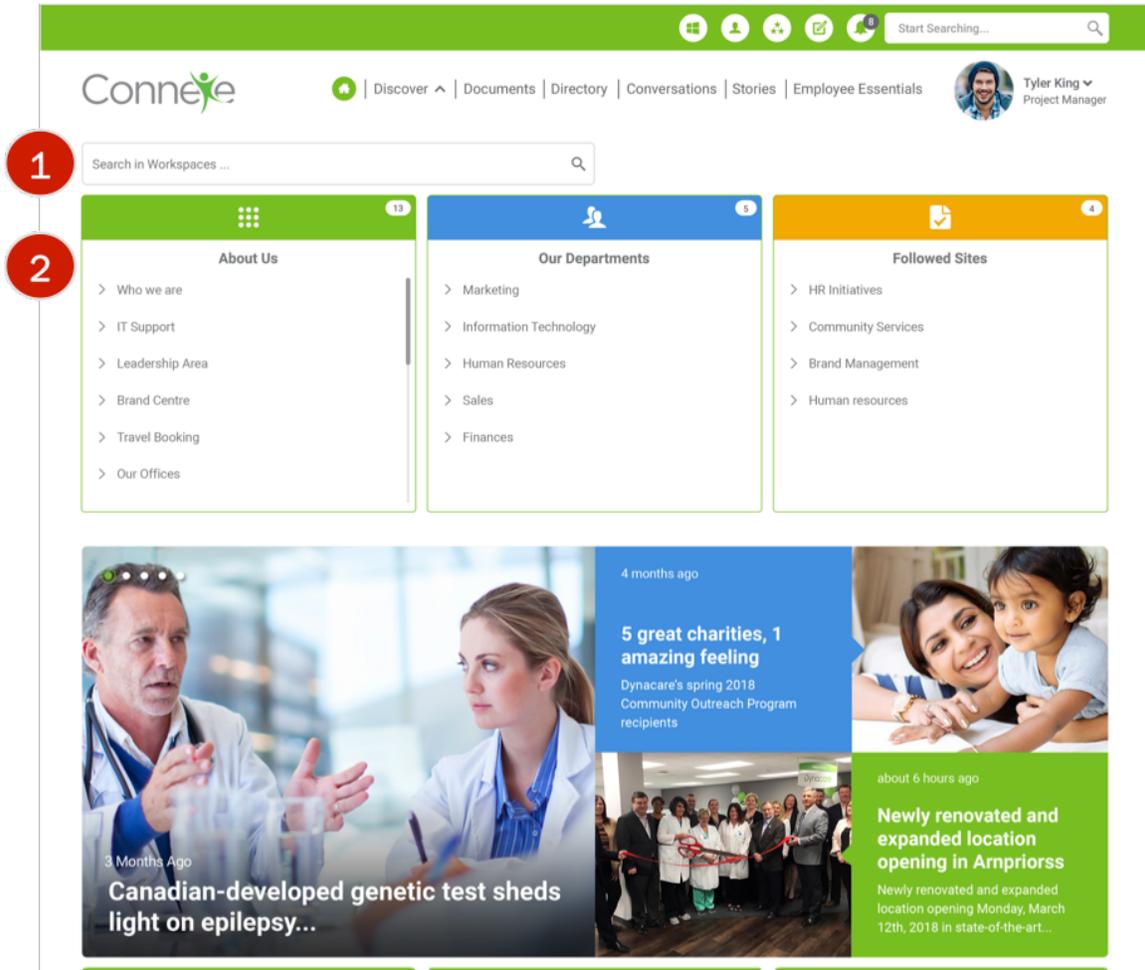


**Image 69. Dynacare Intranet Workspaces.** ConneXe's *Workspaces* menu provides direct access to information about the organization and departments, and allows employees to follow specific sites within the intranet.

*Dynacare_04_Home_Workspaces_Live.png*

## Workspaces Highlights

The first label in ConneXe's global navigation, *Discover,* opens a drop-down menu containing three clearly defined link collections, or *Workspaces*.

1. **Scoped search:** Employees can search inside specific workspaces to get more narrow, tailored results, specific to these areas of the business.

2. **Customized columns:** The first column, *About Us*, houses corporate-level content and outlines Dynacare's senior leadership team, departmental teams, corporate giving initiatives, and operational areas. The second column, *Our Departments*, comprises team sites that link to each of the core business teams. The third column, *Followed Sites*, connects users to important sites, which they can select to follow.

# Search
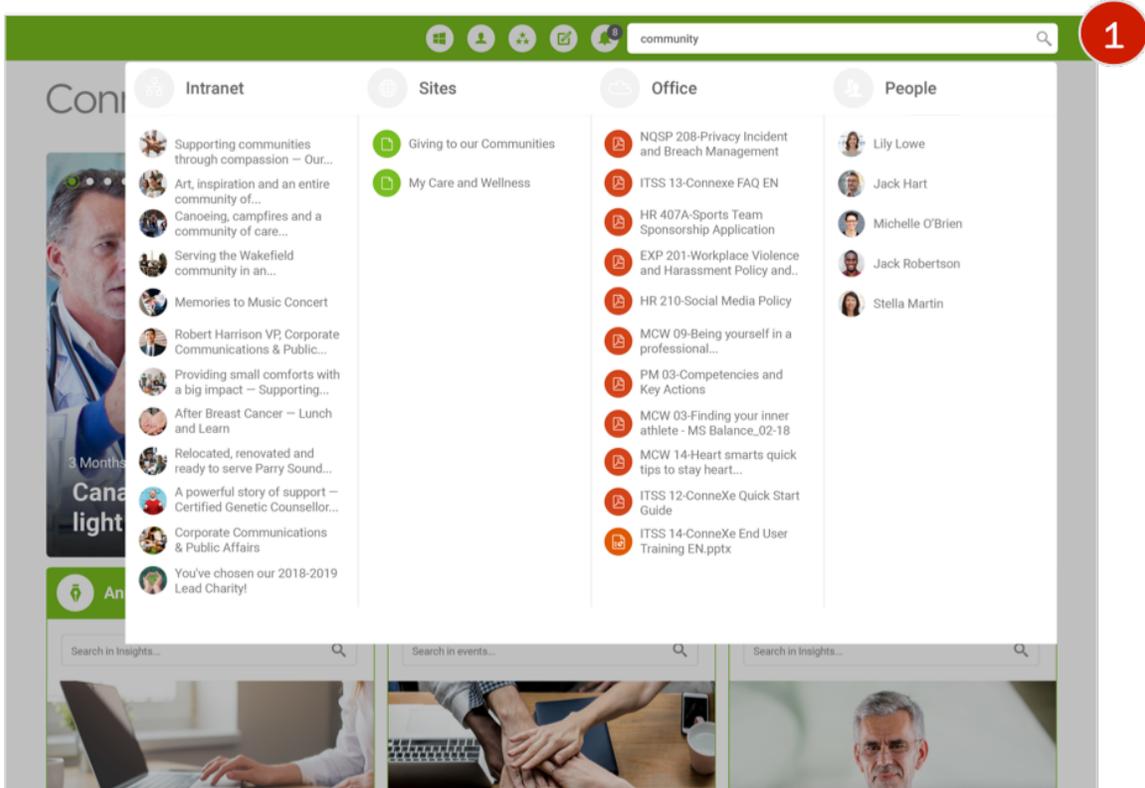


**Image 70. Dynacare Intranet Search.** The ConneXe search functionality is highly responsive and presents results in a well-organized, four-column grid. *Dynacare_05_Home_Search_Live.png*

## Search Highlights

Because it is both predictive and highly responsive, ConneXe's search experience returns results right as the user begins typing. ConneXe's global search provides quick access to all content across the intranet, with results broken down into four handy categories that make it easy for users to find what they need.

1. **Search results:** Search functionality is integrated with Dynacare's SharePoint Online environment, which allows users to search for content on the intranet and SharePoint from a single search box. Results for intranet content, site-specific content, office-related results, and people all display in a set of easy-to-scan results.

# Conversations
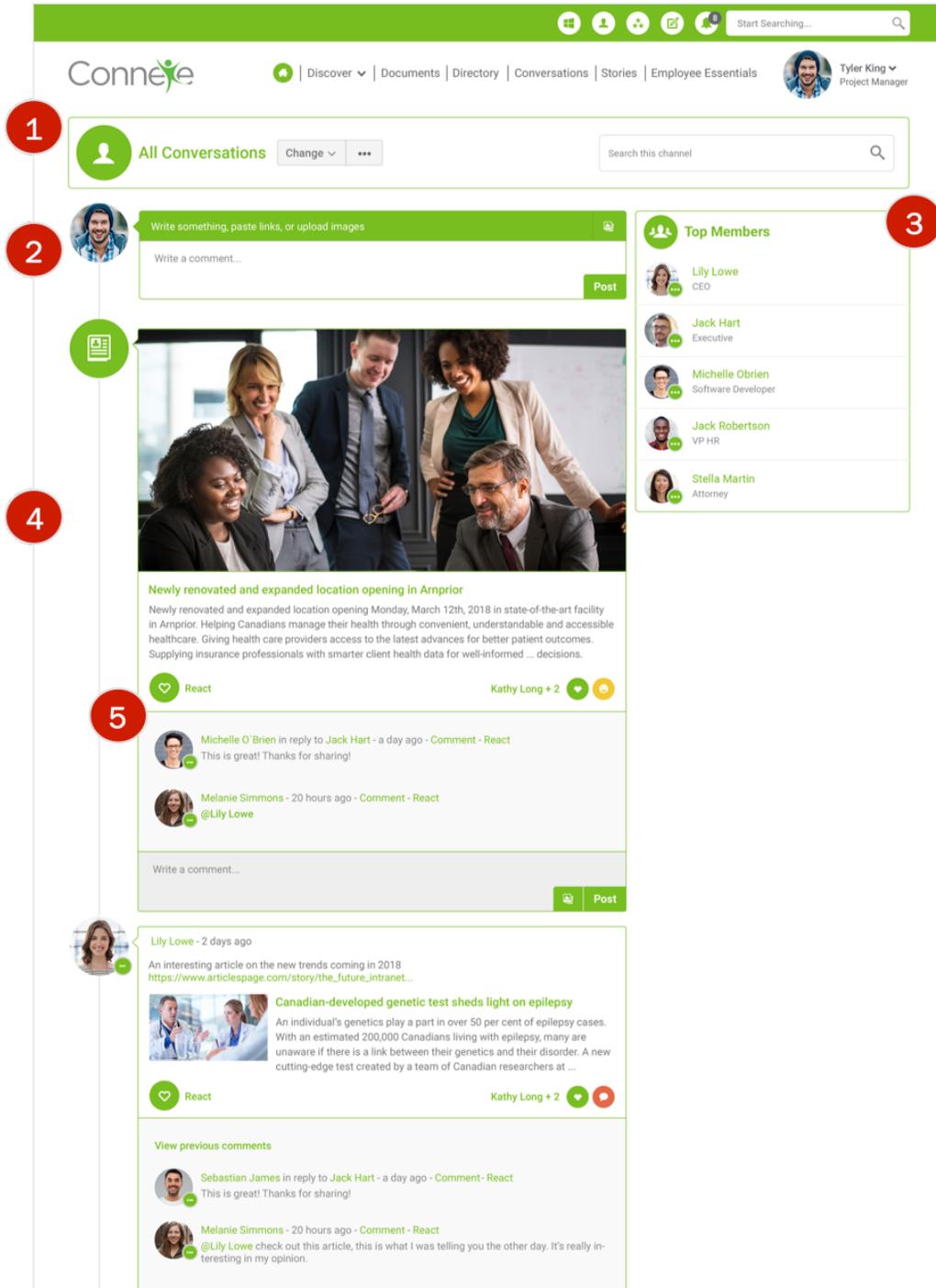


**Image 71. Dynacare Intranet Conversations.** Social conversations on ConneXe help to bring the platform to life and give each employee a voice.

*Dynacare_06_Conversations_Live.png*

## Conversations Highlights

Enterprise social features contribute to employee well-being at Dynacare as they offer a constructive outlet for employees to provide feedback, interact with one another, and collaborate. Sharing, reacting, and commenting on internal communications brings all employees into the discussion, reinforces a positive and open culture, and encourages all employees to engage in the corporate narrative. Social and conversational features are also enabled on department and team sites on ConneXe, for quick and informal message sharing, answering questions, and providing another way to effectively find and share knowledge.

1. **All conversations:** Employees can view all of the conversations happening across the organization, or they can choose to see only those happening in their department, or on their team. The ability to search within each channel helps employees easily refer back to previously posted content and conversations they found to be particularly interesting and valuable.

2. **Post area:** Including the user's profile photo near the post-creation area helps reinforce that they are the person posting. Employees can write a post, upload an image, or paste a link in this section to spark conversation.

3. **Top members:** People who post often or those who frequently participate in conversations are featured in this space, along with their headshots, titles, and links to their employee profiles.

4. **Posts:** Posting a link to an article includes an appealing image, the title of the piece, and a short snippet, whereas posting photos showcases each image shared for employees to then discuss. Employees can also mention each other in posts by using @mentions to strike up even more commenting and engagement.

5. **Comments and reactions:** Users can comment on each post, @mention each other in comments, and even include an image in their comments. For users who prefer not to comment but still want to participate in the conversation, easy-to-click reactions, including a smiley face, star, and heart are available as a more passive means of engagement.

## News
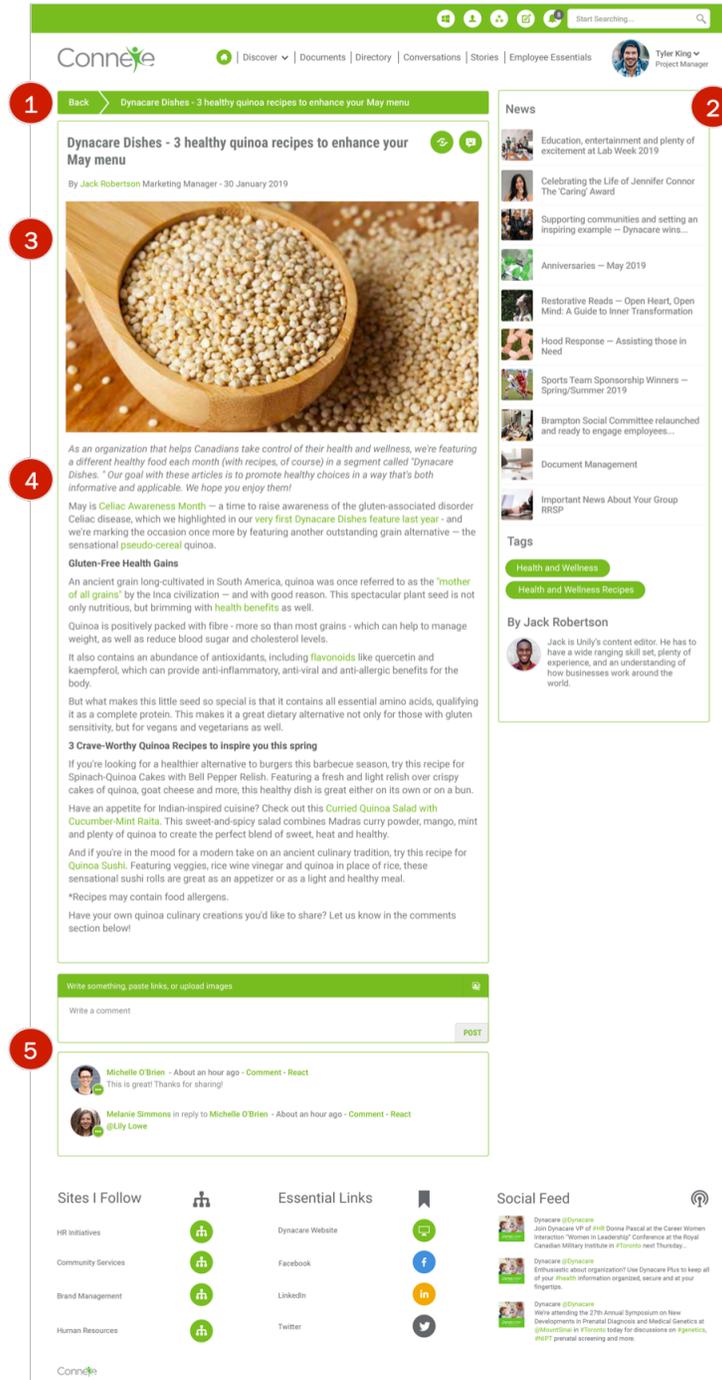


**Image 72. Dynacare Intranet News.** Users can skim, scan, and engage with Dynacare news easily with ConneXe's reader-friendly article templates.
*Dynacare_07_News_Article_Live.png*

## News Highlights

Stories and news articles on ConneXe live in simple templates that are clean and easy to read. Commenting is supported at the bottom of each article to encourage conversation and collaboration. Users can also share articles with their departments, teams, or colleagues through @mentions.

1. **Back and current story:** The white arrow against the green background reinforces which story the user is currently viewing. With an easy-to-access back button, Dynacare employees can quickly get back to see all available news stories.

2. **Right rail:** Intelligent algorithms find and present related content in the right rail, alongside author profiles and content tags.

3. **Image space:** Large enough to reinforce the key messages of the story, but not so large that they overtake the page, images effectively draw employees' attention and use a mobile-friendly aspect ratio for device responsiveness. Image captions also help summarize and reiterate the story's key points.

4. **Content formatting:** The use of white space makes the content more balanced and impactful, while green highlighted text links draw users' attention to keywords and phrases. Bolded subheads help to break the content up into focused paragraphs.

5. **Conversation:** Users can comment and reply to one another on each news article, paste related links in the comments, and even upload an image with their comments. Employees can also see who has already commented on the story and add quick reactions.

## People Directory
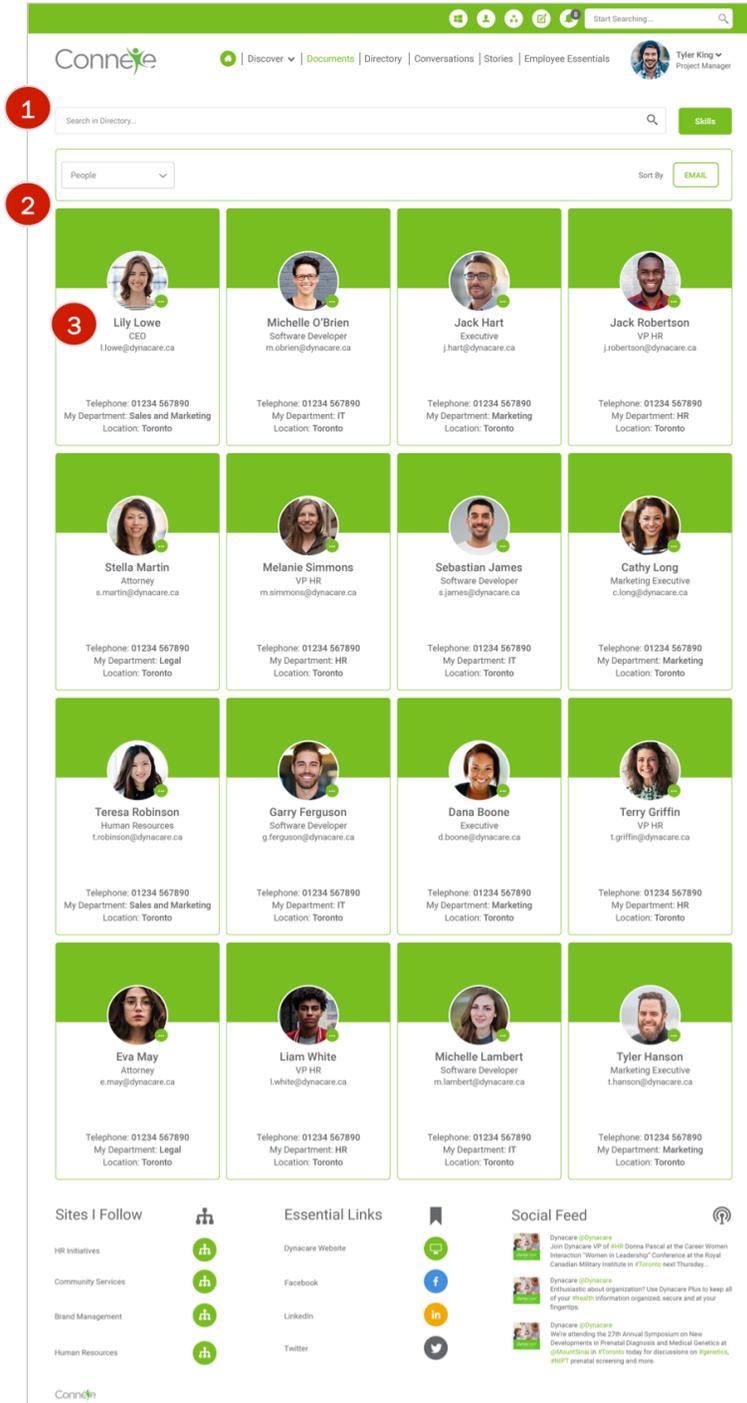


**Image 73. Dynacare Intranet People Directory.** It's easy to find Dynacare colleagues using the people directory, which allows employees to filter by key skill sets. *Dynacare_08_People_Live.png*

## People Directory Highlights

The ConneXe people directory is an essential part of the intranet, as it aggregates the profiles of every Dynacare employee and allows any user in the business to search using free text or filtering by employee profile data. Filtering by skill set is important because many Dynacare employees work in specific science-related roles, so finding specialists and experts is essential. The directory helps employees find out where people work, locate the right colleagues to answer complex questions, and unlock critical knowledge across the business.

1.  **Directory search:** For narrower people results, users can search from within the directory.
2.  **Filters and sort:** Employees can also filter and sort the people results in the directory by title, name, email address, skills, etc.
3.  **People cards:** In the directory, each person's headshot is offset by the Dynacare brand-friendly green; the card also includes the person's name, title, email address, telephone number, department, and office location.

## Profile



Image 74. Dynacare Intranet Employee Profile. A clean layout coupled with gamified completion goals makes finding employee information in ConneXe profiles fast and fun. *Dynacare_09_Profile_Live.png*

## Profile Highlights

Employee profiles give each ConneXe user an identity on the intranet. In addition to showcasing core employee information such as department, job title, and location—which is all synced from a centralized employee data collection—profiles also allow all employees to write about themselves and what they are currently working on at Dynacare. Users can tag their profile with key skills, which are essential for the directory and the ability to discover experts based on skill sets.

Profile completion goals encourage users to maintain their profile data through gamification, as users get a percentage rating based on profile completeness. Users can also get quick access to their internal network of connected colleagues from their profile.

1. **Personal information:** Each employee profile contains a space for a professional-looking headshot, the user's email address, contact information, department, office location, and links to personal social media channels.

2. **Recognize peers:** For colleagues ready to recognize their peers, this is possible from the employee's profile. Clicking the *Recognize Now* button opens the Achievers employee recognition app.

3. *About me*: Employees can write a short paragraph about themselves in their profile as well as share information about projects they are working on. Tagging skills in their profile makes it possible for other users to find them as they can filter and sort based on these attributes in the broader people-directory view.

4. **Completion and connections:** Users can see exactly what they need to fill out to achieve a completed profile. They can also see their workplace connections and search within this group of individuals for easy access and communication.

## Who Does What



**Image 75. Dynacare Intranet *Who Does What*.** The *Who Does What* business overview page is dedicated to giving users a simple overview of the core Dynacare business functions. *Dynacare_10_About_Us_WhoDoesWhat.png*

## Who Does What Highlights

The *Who Does What* page helps employees understand the Dynacare business structure and offers details about the work of cross-functional departments. This purposefully named page also provides one-click access to each department's site within the intranet. The template used for this page is consistent with other corporate level-pages to provide more intuitive user journeys, as users know exactly what to expect from page to page. This makes navigation and discovery easier.

1. **Intro area:** The top area introduces users to the page by clearly stating the page's purpose and offering a bit of body copy to further substantiate why it exists.

2. **Department cards:** Each department card contains an image that reflects the department's function, the name of the department, and a link to read more about it.

# Team Site Page
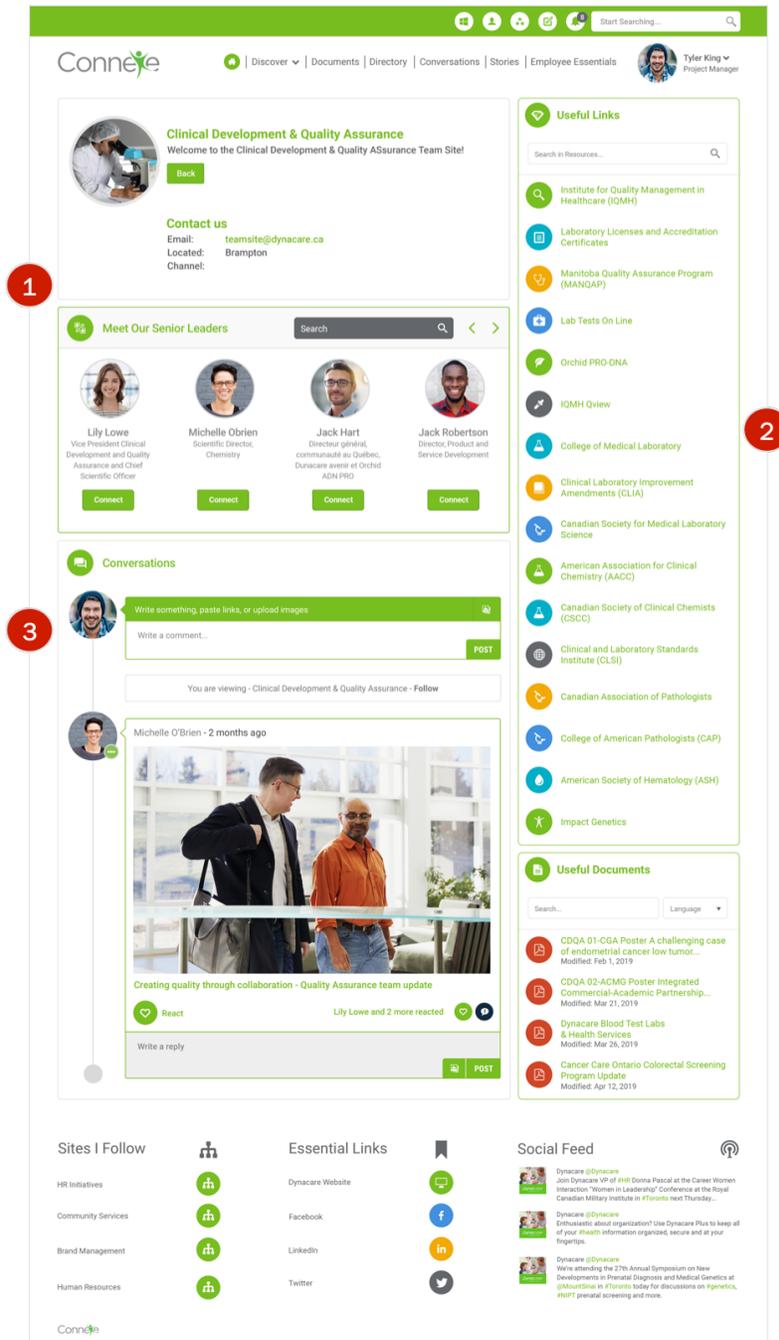


**Image 76. Dynacare Intranet Team Site Page.** Each team site landing page outlines what the team does, introduces leadership team members, and provides links to critical department tools and documents. *Dynacare_11_Clinical_ Development_Team_Live.png*

## Team Site Page Highlights

Linked from the *Who Does What* page, the team site landing pages are purposefully simple and provide an aggregated-yet-open view of departmental activity.

1. **Overview and leadership:** Each page includes an overview of the department along with contact information. Senior leadership team members are featured in an easy-to-search micro-directory.

2. **Useful links:** Relevant, department-related documents and links fill the right rail, giving users quick access to curated materials, as well as important systems and websites. Colorful iconography reinforces the different link types.

3. **Social feed:** A social feed in the center contains the latest stories, rich media, and images uploaded by employees, which keeps the page fresh and provides a real-time pulse for the department.

## Photo Gallery



**Image 77. Dynacare Intranet Photo Gallery.** ConneXe's photo gallery showcases Dynacare's most important resource—its people—and how they help to deliver the company's success. *Dynacare_12_Photo_Gallery_Live.png*

## Photo Gallery Highlights

Dynacare created a dedicated *Photo Gallery* page that not only showcases images of projects and teams, but also breathes life into the intranet, serving as a showcase of all the great people and personalities that make up the company. Photos are categorized; when clicked, they open in a lightbox to enhance the detail.

1. **Photo gallery:** Each photo gallery contains a clear title, a preview of the images contained in the gallery, and a numerical indicator of how many photos live in each gallery.

## Employee Essentials



**Image 78. Dynacare Intranet Employee Essentials.** The *Employee Essentials* page provides everything employees need, from onboarding to workplace wellness tips and career progression planning.
*Dynacare_13_HR_Employee_Essentials_Live.png*

## Employee Essentials Highlights

The employee essentials page is a highly personalized area of ConneXe and is built around the Dynacare core employee experience pillars: *Inspire*, *Grow*, and *Thrive*. The page leverages design elements consistent with other intranet areas and is designed to show individual users exactly which specific tasks they need to accomplish to enjoy the best working experience possible. Links and page content are personalized and dynamically adjust depending on the user's role.

1. **Core value:** The Dynacare core values are clearly defined in this space, and employees can also find relevant content that ladders up to each value statement.

2. **Related content:** Each card-based design includes a light green stroke, related image, the content or application title, and a short description, all of which help reinforce what the content is about and where the links will take users.

## Mobile
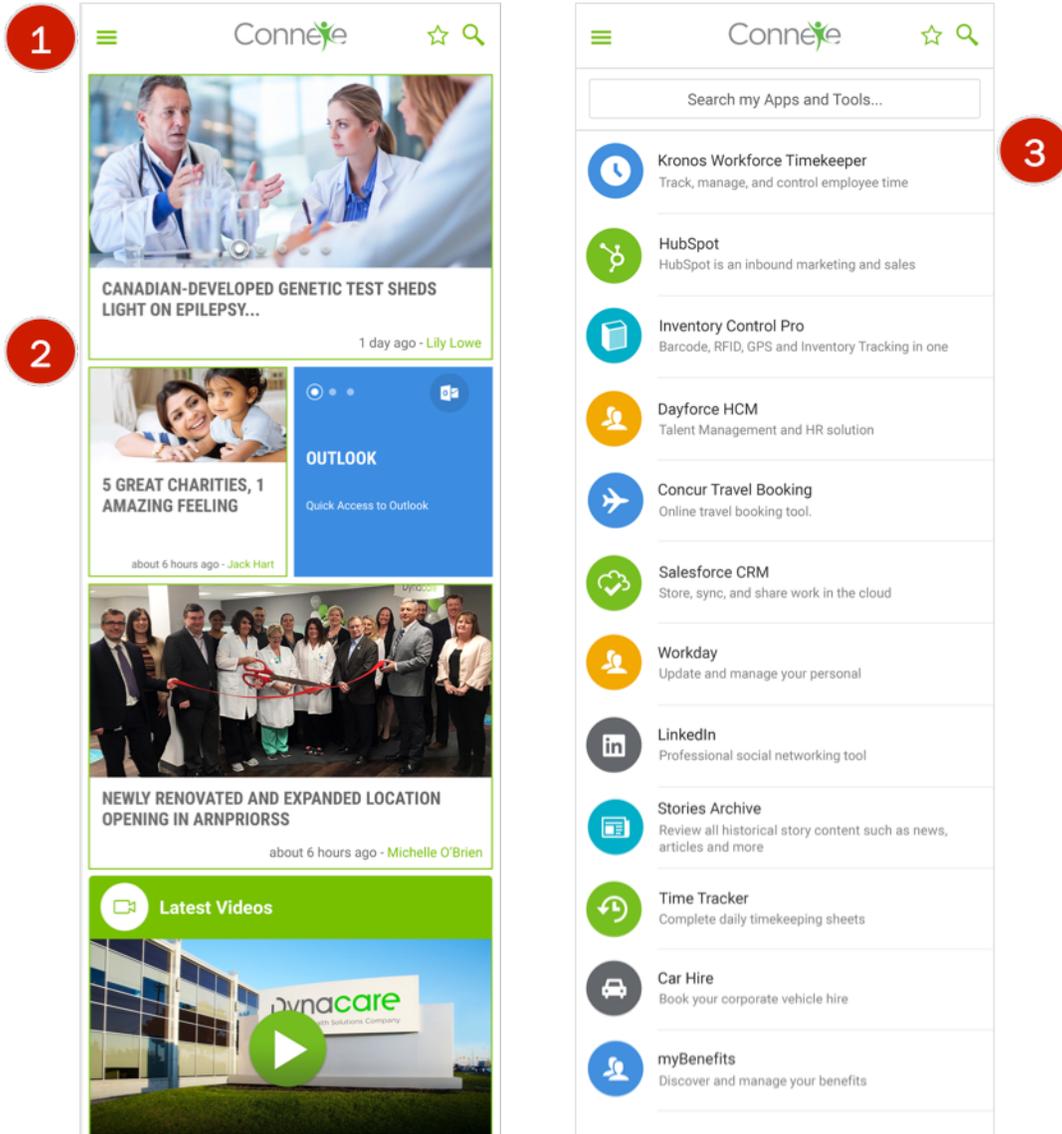


**Image 79. Dynacare Intranet Mobile View.** On mobile, employees can expect and enjoy the same thorough content that appears on the desktop. *Dynacare_14a_Mobile_Homepage_English_Live.png* and *Dynacare_14b_Mobile_Apps_and_Tools_English_Live.png*

## Mobile Highlights

Roughly two-thirds of ConneXe's users are based in laboratories and on the road, so it is imperative that the platform deliver a superior mobile experience. It does this through native apps and responsive design, which let nonwired employees enjoy the same quality experience on their mobile phones and tablets as they would on a desktop. ConneXe delivers true workforce unification and connectivity from any device, anywhere.

1. **Mobile navigation:** ConneXe's mobile navigation includes the familiar hamburger menu, a logo in the center that links users back to the homepage, and the ability to search directly from the header.

2. **Single-column layout:** A single-column mobile layout and simplified view of content cards makes the mobile homepage easy to scan and scroll.

3. **Mobile apps and tools:** As with the desktop version, the mobile apps and tools menu provides a logical icon, purpose-driven app or tool name, and a short description of the app or tool to help users feel confident about selecting the correct option for their task. Users can also search in the mobile version of the apps and tools menu, making for quick and easy tool access on the go.

# DESIGN PROCESS AND USABILITY WORK

## A Research-Based Approach

The team's design approach was multipronged and included several detailed research steps, but the first step was to make the case for change. The team used a variety of analytical tools to accomplish that goal, including Net Promoter Score, employee feedback surveys, and Google Analytics to complement anecdotal feedback it was hearing from employees. This data helped the team assess the current state and gain insights into the areas that required improvement.

Team members also defined four strategic pillars to help them determine which employee portal capabilities were critical to enhance ConneXe. These pillars later evolved into a list of five capabilities critical to achieving the team's vision for the new intranet:

- Communication

- Social networking

- Productivity

- Access to knowledge

- Effective collaboration

All of these early assessment and vision-building activities provided a solid foundation for the project, but the through line for the project's success emerged through one key activity: including users in the design process. The team engaged a cross-functional team of employees from all levels, geographies, and lines of business to participate in bimonthly design-thinking workshops. The internal team collaborated with KPMG, a national lead partner for Microsoft services, to help lead and facilitate these stakeholder workshops alongside the Dynacare business owner/project lead. These workshops helped the team finalize the vision and intranet strategy, and contributed to a better understanding of employees' goals and priorities.

Other design and assessment research activities included:

- **Defect log review:** By reviewing current state support-defect logs on the existing ConneXe platform, team members were able to gain a good understanding of its pain points and ensure that they designed a new experience that addressed the service gaps. This analysis revealed that the existing system lacked a sophisticated, intuitive, and user-friendly CMS; it also lacked the flexibility to build web parts. Other findings revealed the costly impact of custom development and the high cost of support maintenance.

- **Net Promoter Score (NPS):** NPS was implemented and measured on a quarterly basis. This data included crowd-sourced comments from employees noting ConneXe areas they wanted to see improved. The primary takeaway from this analysis was that employees wanted to see team sites developed for each of their functions to promote collaboration, teamwork, and knowledge sharing.

- **Survey:** An enterprise-wide corporate communications intranet survey provided meaningful insights and direction on what was working well and which areas required improvement. This analysis revealed the need to include more business application links in the new design and also highlighted the need to help personalize the UX through customized dashboards, etc.

- **Expert reviews:** Independent consultants who were also part of the Steering Committee conducted expert reviews that provided meaningful insights on best practice design. The team applied these insights when it built the high-level wireframes and the final high-resolution designs.

- **Market intelligence:** The team leveraged market intelligence through the Clearbox study, *SharePoint Intranet In A Box* (2018 Edition). This study provided many examples and screenshots, and highlighted key intranet features and capabilities. It also helped the Dynacare team refine its vendor shortlist and build selection criteria.

- **Prioritization:** During the ConneXe stakeholder workshops, the team completed an analysis exercise in which it rated each proposed feature idea based on a set of criteria: business need, impact to the business from a change perspective, and the potential reach of the change. Also, CGI and the ITSS team completed an analysis to score each feature idea based on ConneXe suitability, ease of implementation, and resources required to implement the feature. This added a layer of context to help further refine the feature set.

- **Personas:** The design team developed employee personas that represented key roles within the organization. These provided insights into the following questions:

  - Where and how do they work?

  - How much time do they spend in the office?

  - Who do they work with?

  - What do they need?

  - What do they want from ConneXe?

- **Iterative design through wireframes and workshop reviews:** To achieve a design grounded in UX, the team developed high-level wireframes for each of the key enhancement pages and iterated these wireframes in stages. Once the wireframes were designed, they were then prioritized and tied back to the intranet strategy through stakeholder workshops. The project lead then developed these raw ideas into high-resolution design comps in collaboration with a third party—Rahim Karsan, a partner and Chief Marketing Officer at Blueprint Internet Marketing. Finally, these designs were further refined to bring them into brand design compliance.

## Adoption/Buy-In

The Dynacare team did not experience any significant challenges with user adoption or buy-in to the new site. Team members attribute that outcome to several factors.

- **User familiarity:** "Users were already familiar with our existing portal, and this familiarity helped to entice users to use our new portal."

- **Change management:** "We created a team of ConneXe Ambassadors to act as our 'cheerleaders,' and they helped to encourage user adoption. We also included a change impact assessment as part of our training program so that employees knew what changed and what stayed the same with our new intranet."

- **Training:** "We created various methods of learning opportunities to help train users on the new portal, including: in-person training, eLearn modules, end-user manuals, FAQs, posters, video teasers, Quick Start Guides, Office 365 Online Apps, and collaboration training."

- **Teaser videos:** "We created a series of teaser videos which we released one at a time in the weeks leading up to the launch. Each video featured Dynacare employees and focused on one of the four pillars of ConneXe in a fun and informal way. These videos were very successful in creating buzz."

| Working with Outside Agencies | |
| --- | --- |
| Agency | Project Role |
| Unily<br>(Intranet solutions company) | • Product and infrastructure management, product implementation, design and IA consultancy, ongoing customer success management, and full technical support |
| KPMG<br>(Accounting organization) | • Intranet strategy development, governance, and design<br>• Steering committee member |
| CGI<br>(IT consulting company) | • Technology guidance; developed the company's previous intranet (a SharePoint 2010 on-premise-hosted solution)<br>• Steering committee member |
| Blueprint Internet Marketing<br>(Internet marketing solutions company) | • High-resolution wireframe designs and branding for images selected for the portal |
| Slater Hill<br>(IT consulting company) | • Broad Office 365 support; triaged support tickets to Unily (application), Microsoft (infrastructure), or Slater Hill (Office 365) |
| Leaf Learning 365<br>(Corporate training company) | • Office 365 Online delivery and employee collaboration training |

## GOVERNANCE

### Ownership

Corporate Communications, HR, and IT jointly own ConneXe. This joint ownership arrangement blends and supports the building of an exceptional employee experience and corporate messaging objectives—all of which are enabled through the use of the best tools and technology.

### Governance Structure

The intranet team created a three-tier governance structure:

- **ConneXe steering committee:** This committee comprised internal and external subject matter experts. Internally, that included representatives from IT, Corporate Communications, and HR leadership. External members were drawn from CGI, Dynacare's IT consulting partner, and KPMG, the national lead partner for Microsoft services. The purpose of this team was to provide directional guidance and support for the ConneXe evolution project.

- **ConneXe stakeholder committee:** This cross-functional team of approximately 20 employees was drawn from different levels, locations, and lines of business. Its purpose was to represent the customer voice and help the team solidify its vision and strategy, and also to ideate on and prioritize enhancements.

- **ConneXe Ambassadors:** The purpose of the ConneXe Ambassadors was to help the intranet team further strengthen the vision and strategy, and enhance ideation of the new platform. The ambassadors also served as portal cheerleaders, helping to influence employees and encourage ConneXe use at launch. The 20 ambassadors were drawn from a cross section of business functions and offered a "hands on the ground" training approach to help their colleagues transition to the new digital workplace. They also participated in the intranet team's bimonthly workshops.

| Intranet Team Responsibilities | |
|---|---|
| Role | Responsibilities |
| Business Owner/Project Lead | <ul><li>Planning</li><li>Determining project requirements</li><li>Development</li><li>Testing</li><li>Deployment</li><li>Closing</li></ul> |
| Project Manager | <ul><li>Planning</li><li>Determining project requirements</li><li>Development</li><li>Testing</li><li>Deployment</li><li>Closing</li></ul> |
| Business System Analyst | <ul><li>Planning</li><li>Determining project requirements</li><li>Development</li><li>Testing</li><li>Deployment</li><li>Closing</li></ul> |
| Project Coordinator | <ul><li>Engage with stakeholders to determine what content needed to migrate to new site</li><li>Ensure project team members were completing tasks on time</li><li>Cull out-of-date content</li><li>Select appropriate imagery for different pages</li><li>Publish content on the new site</li></ul> |
| SharePoint Specialist | <ul><li>Add content submitted by designated Team Site owner, Content Owner, or ConneXe Business Owner to SharePoint</li></ul> |

## URL AND ACCESS

| Access Information | |
|---|---|
| **Item** | **Status** |
| URL | www.connexe.dynacare.ca |
| Default Status | The intranet is set as users' homepage by default when they launch their Google Chrome browser. Users cannot change the setting. |
| Remote Access | Fully supported cloud-based solution |
| Shared Workstations | Many employees who do not have a personal workstation for their daily tasks (e.g. phlebotomists, couriers, etc.) use a shared workstation to access information and work apps, and to communicate with other employees across the organization. |

# TIMELINE

| Project Milestones | |
|---|---|
| **Milestone Date** | **Milestone Description** |
| December 15, 2015 | First company intranet launched: A custom-developed SharePoint 2010 on-premise site with third-party hosting |
| January–December 2016 | Resolved break of and fixes for current SharePoint intranet<br><br>Developed intranet strategy and governance model |
| April–August 2017 | Launched quick-win enhancements to the existing SharePoint intranet, including: weather widget, Twitter feed, Must Read web part, Soapbox Ideation widget integration, and *I Would Like To* quick links<br><br>Conducted ConneXe stakeholder workshops to finalize the vision, strategy, employee voice, ideation, and prioritization activities |
| September–December 2017 | Designed the ConneXe UX through wireframes |
| January–March 2018 | Explored the market through the ConneXe RFP process |
| April–May 2018 | Held vendor demos with five companies |
| June 2018 | Received Unily proof of concept |
| July 2018 | Selected final platform and approved business case |
| August 2018 | Held project kick-off and lab workshops |
| January 2019 | Achieved launch-ready intranet and completed user acceptance testing |
| February 2019 | Trained end users, held marketing and communications launches, and released teaser videos |
| February 28, 2019 | Go-live launch date |
| **Overall project time frame:** 6 months | |

## CONTENT AND CONTENT CONTRIBUTORS

| Content Development and Oversight | |
|---|---|
| Contributors | The six content contributors are currently drawn from the Corporate Communications Department (3) and the HR Department (3). |
| Contribution | The site administrator reaches out to employees in different departments and locations within the organization to discover news, interesting stories, and upcoming events, so that the Corporate Communications team can shape this content for publication. |
| Training | Unily conducted CMS training and content contributor training for all content contributors and administrators prior to launch. This included in-person training and guides. |
| Maintaining Quality | The site administrator maintains an editorial calendar to ensure content is not duplicated and works to develop a mix of monthly themed articles and standalone content while developing ideas for new and engaging articles.<br><br>Prior to publication, the Corporate Communications team reviews and approves all content to ensure accuracy and adherence to intranet guidelines.<br><br>Content is then reviewed monthly to ensure consistency and quality. The site administrator also responds to all employee inquiries and comments on the *Conversations* channel. |
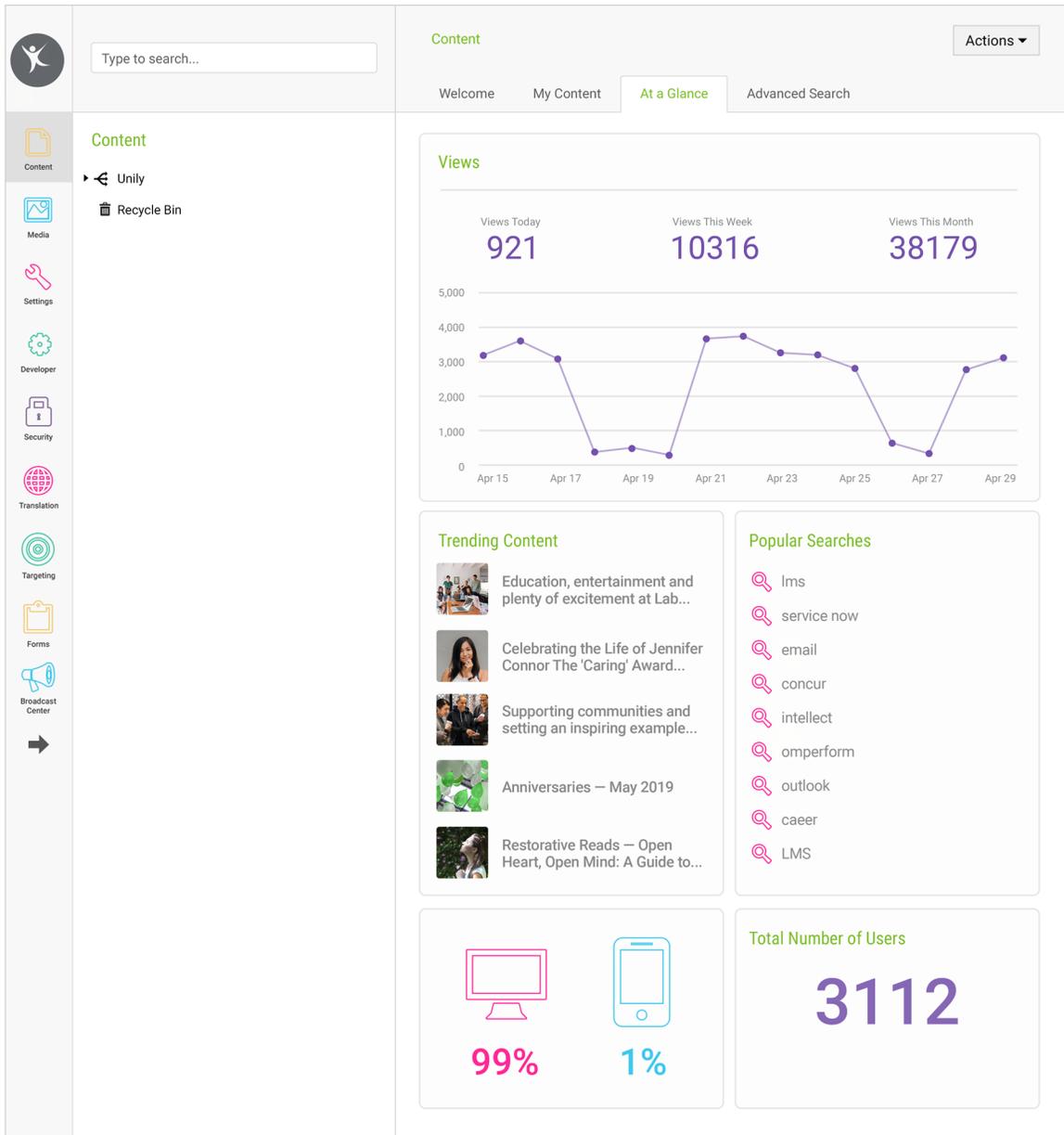
**Image 80. Dynacare Intranet CMS.** The Dynacare CMS is simple and highly organized to ensure that the intranet is maintained over time with a best-practice IA and strong governance. Sections down the left side break out core functions, such as the *Media* section for images and other rich media, and the *Broadcast* section where users set their notification rules. The core content tree stores information hierarchically for easy navigation and permission management, and each piece of content presents at-a-glance analytics to track adoption and performance. *Dynacare_15_CMS_Live.png*

## Culling Content

In order to move good content from the old platform to the new one, the team reviewed previous intranet content and selected items to transfer or cull based on relevance. Old news content was archived and omitted from the new platform, while evergreen content (such as company policy documents and executive biographies) was carried over. The new intranet was populated with news content dating back to three months prior to launch to ensure a sense of continuity when the new intranet launched. Other evergreen content, including executive team biographies and departmental overviews, was revised and refreshed to add energy to the content being carried over.

Some of the culled features, such as a widget displaying each of Canada's time zones, were more popular than originally thought; the team is now reviewing the reintroduction of this feature. The team learned a valuable lesson from this omission and suggests that other intranet teams consider including targeted survey questions to help identify which specific features employees want to see carried over to a new intranet platform.

**Image 81. Dynacare Intranet Leadership Page.** This simple content page is aimed at bringing users closer to their leadership team. Users can click through to learn more about their leaders or follow their profile so they can be notified when the leaders posts new content.

*Dynacare_16_About_Us_Leadership_Team_Live.png*

## TECHNOLOGY

| Technology | |
|---|---|
| Category | Technology Used |
| Web Server Hardware and Operating System | Windows Azure<br><br>Office 365 Platform<br><br>SharePoint Online<br><br>OneDrive |
| Bug Tracking/Quality Assurance | Service Now |
| Design Tools | Unily tools |
| Site Building Tools | Unily CMS |
| Content Management Tools | Unily CMS |
| Search | Unily search functions |

## Replacing Obsolete Technology

The previous version of ConneXe launched on December 15, 2015. It was a custom-developed solution, based on SharePoint 2013 on-premise, and was a third-party hosted solution from CGI.

The previous version of the intranet was received positively by the organization, but it had a significant number of underlying technical challenges that required costly development and financial resources to resolve. This made the platform unstable. The platform's architecture required the organization to have two sites developed—an English site and a French version of it—which resulted in the duplication of publishing efforts, prevented unified conversation and social commenting capability, and required intensive coding efforts to build workflows and variations to support content publishing.

This was also not an evergreen product with updated product releases. Instead, any required enhancements had to be defined by Dynacare and custom developed and tested. As a result, the platform was not flexible or scalable. This system was also lacking in three critical areas.

- **Not cloud-based:** Because the system was not cloud-based, users had to be on the Dynacare network to access the portal.
- **Not mobile responsive:** The system was not responsive. Because optimized versions for both the mobile and desktop experiences did not exist, mobile usage was less than 2%.
- **Costly:** The system was very costly to maintain, in terms of monthly operating costs, enhancement development, and support.

The company needed a better, modern, cloud-based solution that would provide an excellent UX and reduce maintenance costs going forward.

## Technology Evaluation

When evaluating possible platforms for the new intranet, the Dynacare team used the following criteria.

- ConneXe suitability: How well would the platform align with what the company wanted to achieve with the intranet?

- Ease of implementation

- Required resources: Which employee resources were required to plan and build out a new site, as well as keep it updated moving forward?

- News publishing capabilities

- User experience

- Social and knowledge management features

- Search

- Analytics

- Employee self-service capabilities

- Integration

- Wildcard features: Did it offer features such as the ability to create a newsletter by selecting articles and photos from the homepage carousel to auto-populate a newsletter template and email it to employees?

## Market Exploration and Platform Vendor Selection

The original idea was to build a custom intranet solution, so team members developed a detailed business requirements document and launched an RFP process so that they could solicit development quotes from three vendors. What they learned through this process was that the effort to build a custom solution using responsive web design would be cost prohibitive, so instead they turned their sights toward the intranet-as-a-service marketplace and focused on Agile options in that space.

By studying market intelligence, they winnowed the possible worldwide intranet-as-a-service vendors down to five top choices. To chose a winner, they conducted a thorough evaluation process, including:

- **Vendor demos:** The team collaborated with each of the five vendors and organized vendor demonstrations for the ConneXe Steering Committee. Each vendor was evaluated on the following criteria: news publishing, UX, social and knowledge management, search,

analytics, employee services, integration, and a wildcard criteria.

- **Proof of concept:** Once the team short-listed the top two vendors, it developed proof-of-concept designs with each of them to showcase a working concept of their platform within the Dynacare environment.

- **Final selection:** Mario Fantozzi, the project's business owner and project lead, built the business case and internal rate-of-return cash flow model as part of the team's preferred-choice recommendation to the company's CEO and CFO for final funding approval.

## MOBILE

ConneXe supports mobile use via responsive design and native apps. It was important that users be able to access the entire intranet from anywhere and on any device since many employees work in the field and are on the road without desktop access. Mobile access gives frontline staff such as couriers and customer-facing employees access to complete intranet functionality, as the mobile design is optimized for all mobile and tablet devices to ensure that every employee has equal access to the intranet, regardless of device.

## SEARCH

Elastic search is integrated into the Unily intranet product, but it also passes queries along to integrated data sources, such as SharePoint, to retrieve results.

Filtering is enabled across various search experiences, and all filters are responsive to the content being searched, such as filtering by department in the people directory or filtering by file type in the document center. In many cases, the complexity of filters is dynamic to the content being searched. So, for example, the department filters are supplied by all the potential departments and are listed against user profiles in the identity management provider. Other filters, such as article tags, are built manually and have simple options to increase usability and reduce complexity.

## ROI

Dynacare requires that each business case put forward for approval stand on its own merit by generating a positive rate of return. The intranet team was thus required to demonstrate this in building a business case for this project. Since launch, keeping track of how the new intranet is performing is an ongoing exercise in tracking both hard and soft metrics; both forks continue to show that the new platform is moving in a successful direction.

Page views are tracked monthly to measure employee engagement. Since launch, average monthly page views have increased by 17% over those of the previous intranet. This means that more users are viewing content beyond the homepage.

Story views are also measured to determine the degree to which employees are engaged with the organizational updates and insights that are being published. One dramatic example of an increase in this type of engagement is with news stories. In 2018, four news stories were viewed more than 400 times. The number of stories has already doubled in just the first four months since the new intranet launched.
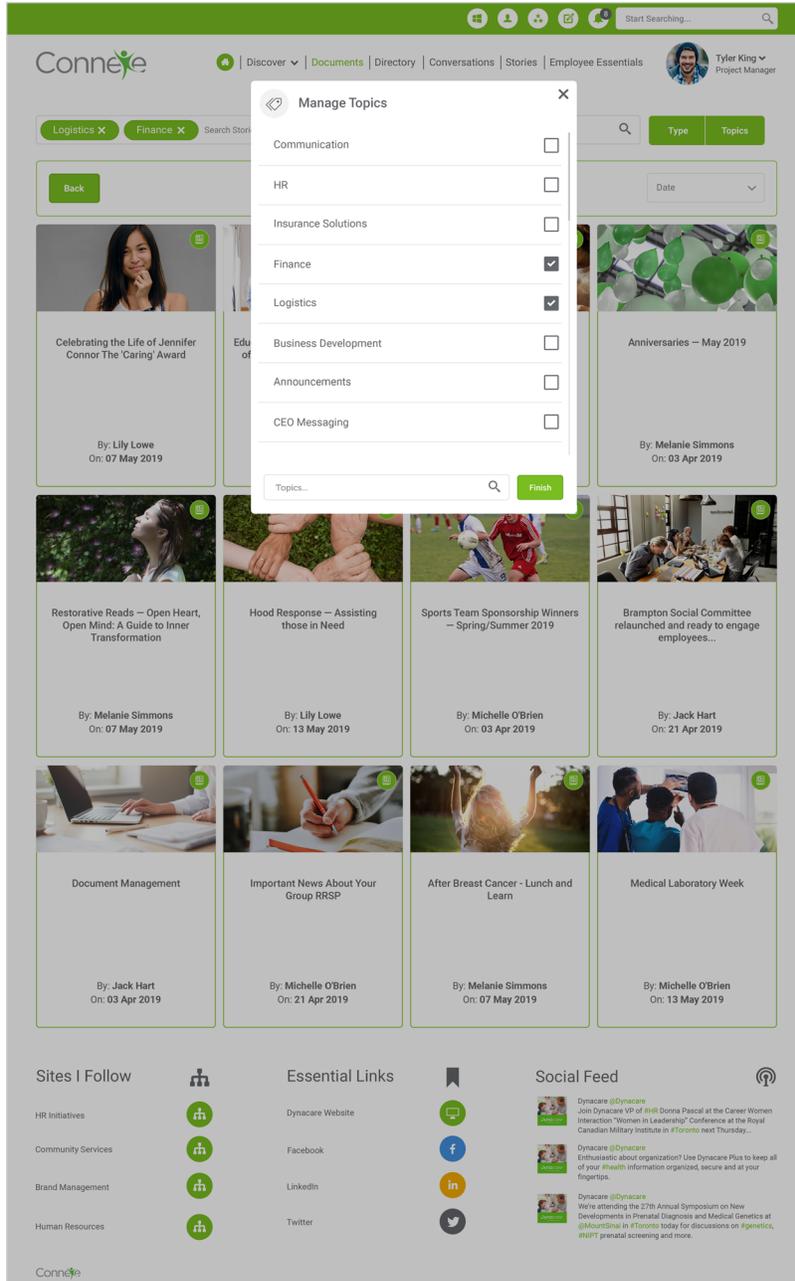
**Image 82. Dynacare Intranet Stories Archive.** The stories archive aggregates all stories, whether they are presented in news, videos, or events. This archive represents the pulse of the business and keeps employees connected to the Dynacare shared vision for success. Users can filter stories by keyword search or by selecting different topics and tags. *Dynacare_17_Stories_Archive_Live.png*

## LESSONS LEARNED AND BEST PRACTICES

### Choose a Platform Provider with Care

The Dynacare team made the decision to purchase an intranet platform as a service rather than build one. This type of approach requires careful consideration as no out-of-the box solution fully meets the needs of a large, complex organization. As a result, there is always a learning curve when evaluating possible approaches. Here's what the Dynacare team learned through that evaluation process:

- **80% of organizational needs are common.** "This means that many organizations would be well served by deploying an intranet-as-a-service platform (IAAS) in their organization. Custom-developed solutions are costly to maintain, costly to build future enhancements, and require a longer time to implement. IAAS platforms can be launched in as short a time as six months."

- **Evaluate multilingual capabilities very carefully when choosing a platform.** "If your organization has multilingual business requirements (i.e. your portal needs to be in English and French), you should carefully review the offerings from each intranet-as-a-service vendor to ensure all of their widgets and native headers are multilingual capable."

- **The Statement of Work (SOW) should define vendor and customer responsibilities in great detail.** "Ensure the accountabilities of both the vendor and the customer are clearly defined in the SOW, so that you know exactly what you are getting in the plan, design, and launch phases of your intranet deployment."

- **Customization capabilities matter if branding matters.** "If branding is important to your organization, there are limitations as to how far you can customize your branding with these IAAS vendors (usually just font type, size, and color). Make sure to engage your marketing or branding team early on in the discovery phase of your deployment to ensure that all of your branding needs will be met by the platform."

- **A local vendor means more face-to-face contact.** "If on-premise consulting is important to your organization, make sure to select a local vendor. Otherwise, you will be incurring excessive travel costs for on-site support. The alternative is to do everything remotely if the vendor is not located nearby."

- **Dig into the details.** "For Canadian companies, make sure to specify that the dictionary to be used for your portal should be Canadian English and Canadian French. Many vendors will default to US English or UK English, and Parisian French."

- **Use a funnel approach to choose the vendor.** "If choosing an IAAS provider to deploy your intranet, make sure to run an RFP process and review at least five different vendors. Each of them has its advantages and disadvantages in terms of product features, pricing, and support. Then, before making your final selection, make sure to get at least three client testimonials to validate the promises and features that the vendors have promised

in their offerings. And request Customer Service Management (CSM) and Digital Workplace Consultant profiles and background experience credentials from each."

## Best Practices

The Dynacare team's list of best practices might seem simple on its face, but this list represents a critical, detailed approach to developing a great, usable intranet platform that will serve all employees:

- Assess the current state: understand your organization's digital workplace maturity level, how employees work to help identify the gaps, and the appropriate tools employees need to do their best work.

- Establish a digital workplace vision.

- Create a capabilities-based digital workplace strategy.

- Align organizational objectives to strategy.

- Engage stakeholders from across the business to better understand the tools that people need to get their work done.

- Select the right digital toolbox based on your business drivers and strategic priorities: messaging, productivity, collaboration, communication, business applications, crowdsourcing, connectivity, and mobility.

- Determine which tools will be part of the intranet, and which tools will be outside of the intranet and part of the larger digital workplace environment.

- Design appropriate governance, operational policies, and management systems to support the success of the intranet post-launch.

- Build change management practices into the project plan to ensure that users embrace this new way of working and that they are ready for the change that is coming.

- Develop marketing and communications plans to help create excitement about the launch.

- Provide sufficient training to all users; include both front-end and back-end user training.

- Measure success and adoption through reporting metrics.

# Husky Energy

## OVERVIEW

### COMPANY

Husky Energy is a Canadian-based integrated energy company that is publicly traded on the Toronto Stock Exchange (ticker symbol: HSE). It is headquartered in Calgary, Alberta, and has more than 8,000 employees in 30 office locations across Canada, the US, and the Asia-Pacific region.

**Headquarters:** Calgary, Alberta, Canada

**Company locations:** Husky Energy Inc. has offices and facilities in Canada, the US, China, Hong Kong, Taiwan, and Indonesia.

**Locations where people use the intranet:** Employees at all Husky Energy locations use the intranet.

**Annual revenue:** $22.5M

### THE INTRANET

**Users:** Husky employees are diverse in their education and professional backgrounds. Some employees use the intranet daily and others have limited access while working in the field.

**Mobile approach:** Responsive web design

**Technology platform:** SharePoint Online

### TEAM

**Design team:** A team of approximately 15 people consisting of internal (IT & Corporate Communications) and partner resources collaborated on HuskyNet using SharePoint Online and Bonzai. Business partners in multiple departments provided additional assistance.

**Leadership:** Carla Yuill, Senior Manager Corporate Communications; Frank Kemeri, Program Manager

**Implementation team:** Darren Bayda, Project Manager; Eduard Spelier, SharePoint Specialist; David Francoeur, Bonzai Specialist; Robin Morgan, Bonzai Specialist; James Wu, Solution Architect; Thomas Yeung, Solution Architect; Shelley Loke, Communications Specialist (CS); Kim Benn-Hilliard, CS; Jayne Owchar, CS; Randall Sommerfeld, CS; Ivan Smith, CS; Steven Tulissi, Senior Application Specialist; Selena Yu, Web Developer

## INTRANET TEAM



**Team members shown here** (back row, left to right): Randell Sommerfeld, Shelley Loke, Ivan Smith, Carla Yuill, and Mirzet Draganovic (project sponsor); (front row, left to right): Darren Bayda, Eduard Spelier, Jayne Owchar, Michael Ng, and Diego Carrera (project sponsor). Team members not shown: David Francoeur, Robin Morgan, James Wu, Thomas Yeung, Kim Benn-Hilliard, Steven Tulissi, and Selena Yu.

## HIGHLIGHTS ABOUT THIS WINNER

The HuskyNet platform fulfills corporate communications needs, makes leaders more accessible, and provides a consistent experience to access corporate or regional information and services. Additionally, its robust search and fully responsive design make it possible for employees to find anything, no matter where they are.

- **Discover content:** Special touches such as tag filtering on search libraries make it possible for employees to find and discover the content they need.

- **Safety:** Safety is the top priority at Husky Energy. Resources related to key areas such as risk, assurance, and emergency contacts help Husky Energy employees protect themselves and their customers.

- **Fun:** HuskyNet isn't all business; fun finds its way into the design, with features like a work anniversaries page and a marketplace where employees can buy and sell goods. Team

volunteer activities are also featured.

- **Structure:** HuskyNet breaks down each business unit by outlining its strategy and providing key contacts, along with news and performance updates. Husky's operations are widespread, but employees can easily navigate and find required information.

- **Working with teams:** HuskyNet offers group sections about teams at the organization. These sections let employees learn about each team's strategy, leadership, news, and performance. This helps employees get a sense of the business as a whole and the value that working in a team brings.

- **Responsive:** HuskyNet is responsive—that is, everything available on the desktop is also available on mobile, with the added benefit of a mobile icon added on each company-issued mobile device for easy access.

- **News and events customized:** Employees can customize their news and events using the content-targeting filter located on the homepage.

- **Site search:** The HuskyNet search is comprehensive and even includes results from the digital workspace beyond HuskyNet's walls. To find the best set for their needs, employees can filter their search results.

- **Scoped searches:** While the main HuskyNet search feature searches all of HuskyNet, some intranet sections—such as policies, locations, and classifieds—offer their own searches. The positions and labels make it obvious that the section searches are different from the site search, and that each is searching a particular area.

- **Filtering:** By providing thorough content metadata and search filtering capabilities, the search features make it easy for Husky Energy employees to quickly find anything they need in the search results, from a safety policy to a classified ad about a mountain bike.

- **Communication:** Displaying contact details about the various leadership teams encourages employees to get in touch when they have questions or concerns. This, paired with the commenting features, contribute to building a culture of positive two-way communication.

## BACKGROUND

Prior to the new intranet, Husky Energy communicated with its staff through four disparate intranet sites, none of which truly served its 8,000 office and field employees. These sites were insufficient and largely unsupported; their information was often dated, and they had limited search capacity. A complete overhaul of the platform, structure, and content was required to meet Husky's communication and business needs.

While the existing system was a major pain point, initially, the project lacked both executive buy-in and funding to move forward. To advance the project, Corporate Communications made a strong case for the business advantages associated with a workforce that is engaged in learning

about and achieving the company's business strategy. As a result, the team was permitted to build Microsoft SharePoint community sites in an effort to improve communication and employee engagement. This alone, however, couldn't solve Husky's challenges.

A senior leadership change resulted in support for a new platform and was the ultimate catalyst for creating an exploratory intranet project team. This team conducted research and reviewed several out-of-the-box SharePoint solutions. This approach was deemed an attractive alternative to managing numerous SharePoint sites, which the company had been doing as a stop-gap measure.

## Goals

The new intranet's goals were outlined as follows:

- Provide a robust search function that delivered current and accurate data
- Engage with employees to create a more informed and collaborative workplace culture
- Increase user adoption by providing a single source of information for employees that was both reliable and mobile accessible
- Provide tools that enable users to create, review, and publish corporate, regional, and department news
- Provide a consistent UX to facilitate easy access to corporate or regional information and services
- Enable administrators and end users to efficiently publish and manage information

## Challenges

The intranet project kicked-off in August 2017, but ideas for a new intranet and about its associated challenges had been circulating long before the project launched. Bringing together disparate systems and a geographically dispersed workforce would be a challenge for any organization, but Husky Energy was also moving to Office 365 online for the first-time. This series of events resulted in a wide array of challenges:

- The project was an early adopter of the Office 365/SharePoint Online platform within Husky, so enterprise support services for this platform were not yet defined with the organization's external service provider. This required additional effort to plan and implement.
- As an early adopter software-as-a-service (SaaS) solution, traditional Disaster Recovery (DR) plans were not applicable, prompting development of a new SaaS DR Runbook.
- Integrated Search for SharePoint 2013 (on-premise) and SharePoint Online were not possible, as the on-premise environment was not upgraded to a patch level capable of sustaining the hybrid search feature.
- The SaaS model limited the team's ability to control and tune website performance.
- Nonproduction Office 365 tenants did not mirror the Production tenant configuration.

This complicated the Sandbox Azure Active Directory to Sandbox SharePoint Online user profile synchronization that relies on the production tenant. Because this setup complicated support, it required extra effort to be resolved.

## Approach

Working with Bonzai Intranet as the selected tool (provided by Dynamic Owl), the project followed the Bonzai delivery approach, complimented by Husky's internal solution delivery process:

1. **Research:** Gauge and assess gaps in the existing intranet through an employee questionnaire. Once survey results are compiled, work with the intranet project team to define project deliverables and success metrics.

2. **Resource:** Gather the required resources—from assembling the right leadership and implementation team to the right project resources—to guarantee successful deployment and adoption.

3. **Assess readiness:** Review and assess existing environments, internally and externally, to determine what was needed technically. Next, ensure that the transition infrastructure outlines the installation process and enables proper support for the new environment.

4. **Plan:** Develop a detailed project plan, based on a targeted launch date, including all intranet committee activities, milestones, weekly meetings, and artifacts, and a two-way flow of project information between the project team and the content and technical stakeholders.

5. **Construct:** Design an intuitive intranet navigation to strengthen usability, integration, and engagement using proven usability exercises. Husky employees played a big part in shaping the design and were engaged throughout the design process, participating in surveys, card-sorting exercises, and tree-testing tasks to ensure that the new intranet was thoughtfully designed with end users in mind.

6. **Content migration:** Conduct a thorough content audit to determine—individually, for each piece of content—whether it should be moved, rewritten, or archived.

7. **Design:** Create a consistent design and UX, integrating Husky's overall brand and corporate culture.

8. **Govern:** Create a governance plan and develop guidelines to provide governance with sustainability, reliability, and longevity in mind. This was executed through the creation of an intranet governance team, which enforces a strict content-owner standard and governance model aimed at long-term sustainability.

9. **Validate:** Once the new intranet is configured, run it through various test scenarios, stress tests, and user tests to validate the final design, architecture, infrastructure, metadata, use cases, and corporate fit.

10. **Train:** Facilitate introductory and ongoing training for each user segment—from everyday employees to content authors/owners to power users.

11. **Launch:** Create thorough communication, engagement/adoption, and improvement plans to ensure employee buy-in and long-term success; the proper launch and communication of a new product are just as important as the configuration and implementation of the intranet.

12. **Manage:** Create new policies and procedures for system integrity to ensure long-term success. In this step, the team changed management and governance plans to ensure the new tools are used properly and sustained over time.

13. **Analyze:** Regularly tweak and update the system to improve adoption, sustainability, and longevity through continuous review of intranet usage analytics.

**Image 83. Husky Energy's Previous Intranet Homepage.** The original HuskyNet went through multiple iterations on an HTML platform, and the site lacked consistency. *HuskyEnergy_01_OldIntranet1_live.png*
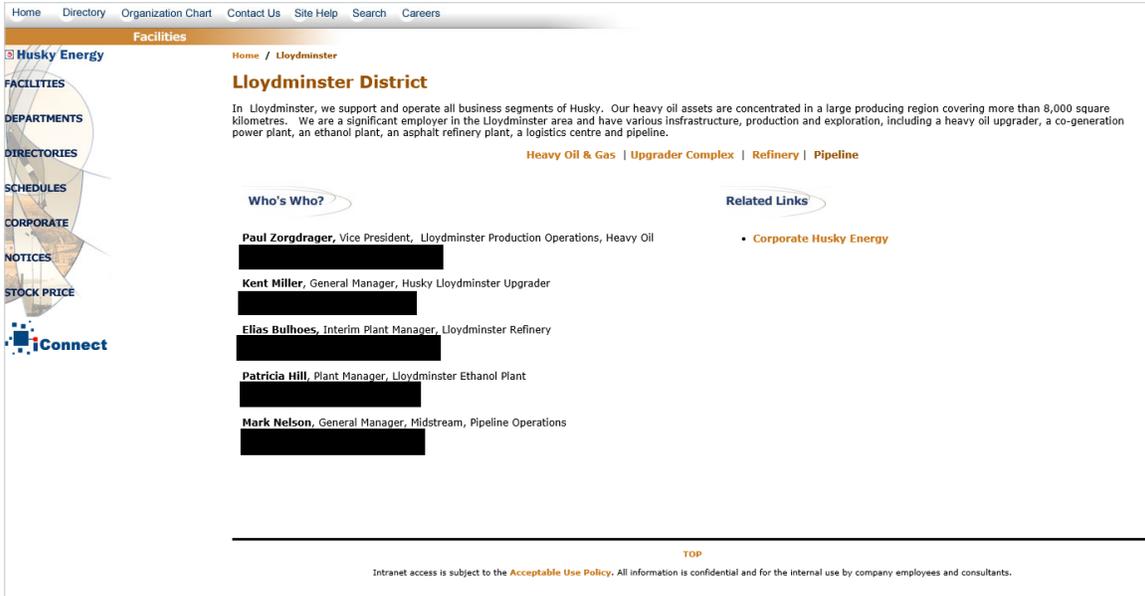
**Image 84. Husky Energy's Previous Intranet Location Page.** The previous HuskyNet lacked consistency from page to page and section to section. This is illustrated by contrasting the design of the location page shown here with the HuskyNet homepage (shown above) from the same design era.
*HuskyEnergy_02_OldIntranet2_live.png*

# DESIGN REVIEW
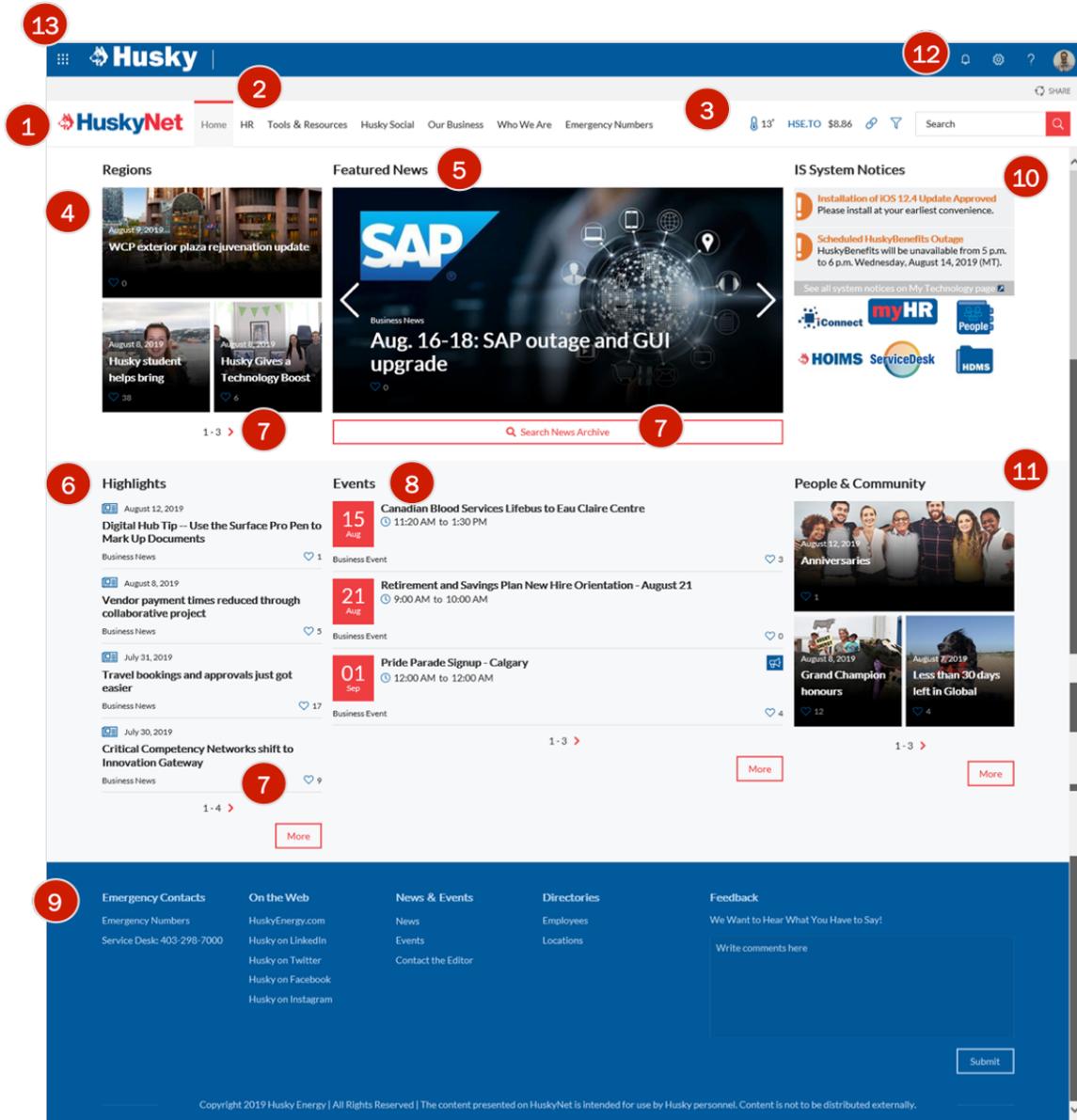
## Homepage



**Image 85. Husky Energy Intranet Homepage.** The homepage offers news and links to applications. *HuskyEnergy_03_home_live.png*

## Homepage Highlights

HuskyNet is at the center of Husky Energy's digital workplace, and the homepage is at the epicenter of HuskyNet. Here, users get access to corporate news, announcements, and links to internal and external applications. All browsers at Husky Energy default to HuskyNet.

1. **Logo:** HuskyNet has its own logo; it's in line with the Husky Energy brand, but differentiated with color and text. This helps give the intranet its own identity, while also making it easy for employees to understand where they are in the digital workplace.

2. **Global navigation:** Global navigation is available on all pages, organized by task, and is situated to the right of the intranet logo.

3. **Common task icons and links:** The upper right corner has a thermometer icon that shows the current local weather and stock price. The link icon (a chain) displays links to regularly searched areas, including both intranet applications and external systems such as myBenefits, People, ServiceDesk, Org Charts, SharePoint, and the HuskyNet safety section. The funnel icon allows users to select their regional preferences for news and events. The universal search searches all content on HuskyNet and SharePoint Online.

4. **Regional news:** News and events are targeted based on regions that the user selects under a subheading labeled *Region*. Regional news items appear as cards in the top left of the homepage, making them highly visible. Each news card includes the title, the date, and an image. The content here informs and unites employees from the same region.

5. **Featured news:** Centered on the homepage, a carousel houses the top five news items to help keep all employees abreast of Husky Energy corporate news. Large arrows make it more obvious to users that they can scroll through the carousel's banners.

6. **Highlighted news:** The *Highlights* section houses important information that can help all employees be more productive in their jobs.

7. **More news:** Designers made good use of progressive disclosure on the homepage by both showing top news items and making the rest of the news readily available. At the bottom of each news section, employees can access additional stories via the *1-3* pagination and the *Search News Archive* and *More* buttons.

8. **Events:** The *Events* section in the center of the page displays three upcoming events and each event's name, date, and time, helping employees stay up to date on current (local) happenings. Like the *Regional News* section, users will see only events for the region they selected in the filter option.

9. **Footer:** A fat footer includes key emergency contact links and a phone number for the service desk, important Husky Energy website links, and a link to contact the news editor. There is also a Feedback box, titled *We Want to hear What You Have to Say*, to encourage employees to provide input on articles, pages, or the site in general.

10. **System notices:** Announcements for Information Services provides real-time updates

on applications and systems health and potential risks. This position helps ensure that employees will spot these notices.

11. **Community:** The *People & Community* section at the bottom of the right rail shows engagement and communal features, such as work anniversaries and various awards. On desktop browsers, these usually appear above the fold to help demonstrate that the organization recognizes and values individuals and their contributions.

12. **Utility items:** In the far upper right—an expected location for such items—employees can find *Alerts*, *Settings*, *Help*, and an icon that links to their profile. Just below, the *Share* link allows employees to share any page with colleagues via email.

13. **Waffle menu:** The waffle menu in the upper left of all pages makes it easy for employees to access applications—such as the site's video platform—outside of HuskyNet.

## Mobile
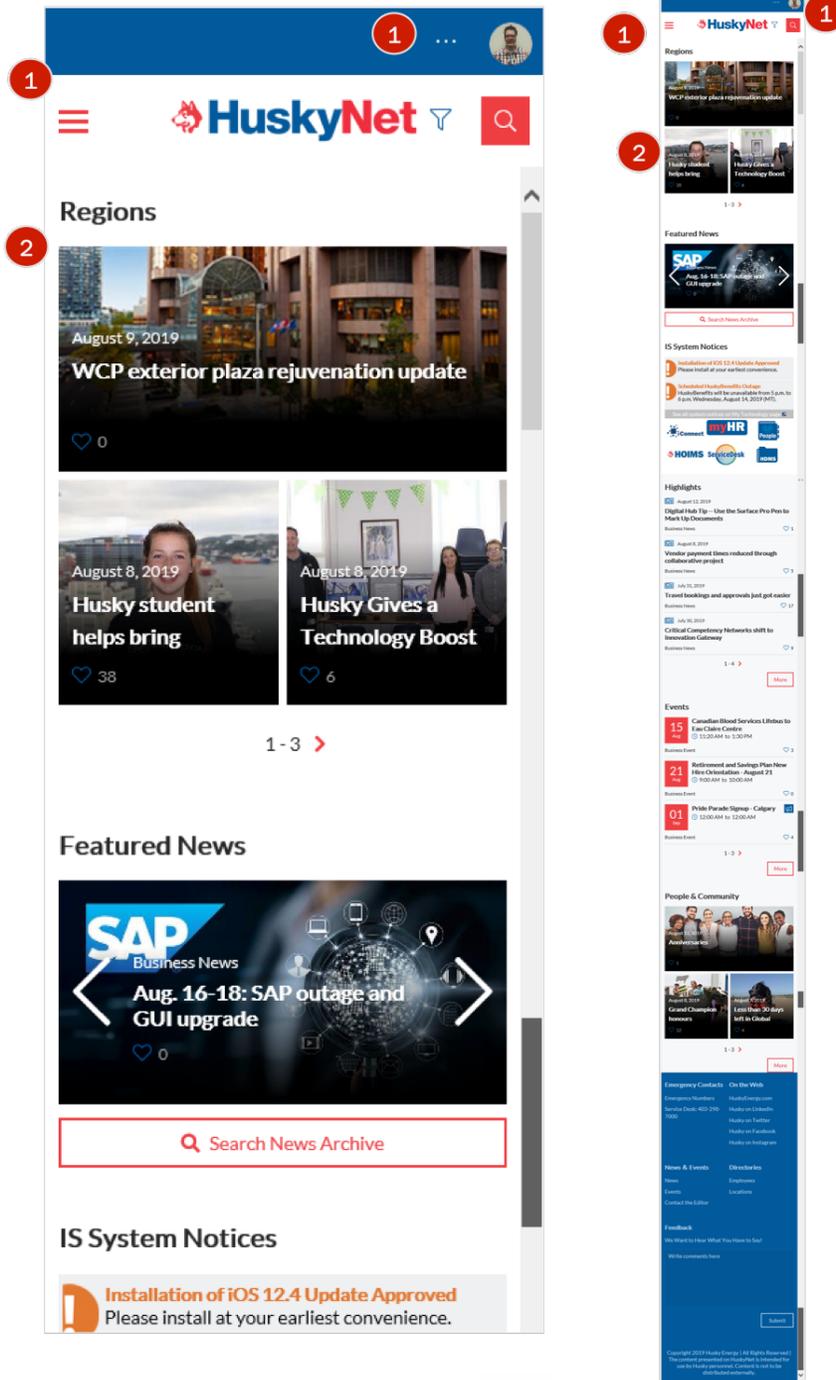


**Image 86. Husky Energy Intranet Mobile View.** The fully responsive HuskyNet prioritizes content and collapses flat menus to save screen space on mobile.

*HuskyEnergy_04_mobile_live.png*

## Mobile Highlights

Because one of the goals for the new HuskyNet was to make the site accessible and usable on mobile devices, the team chose a responsive design approach. Coupling this with a shortcut icon auto-installed on Husky corporate mobile devices—which all employees have—has helped to make HuskyNet popular.

Husky Energy has 8,000 employees and contractors across Canada, the US, and the Asia-Pacific Region (including Hong Kong, mainland China, and Indonesia). Some employees use the intranet daily, while others have limited access when working in the field.

Having HuskyNet available on mobile devices gives those employees who travel or work in remote field locations access to the same corporate information and resources as are available on desktop.

1. **UI elements for mobile:** Various elements that are exposed on desktop—such as the global navigation and utility link—are collapsed on the mobile screen to make the best use of the small screen.

2. **Priority:** Homepage sections are presented in prioritized order, so employees immediately see the most important items, such as news.

# Preferences
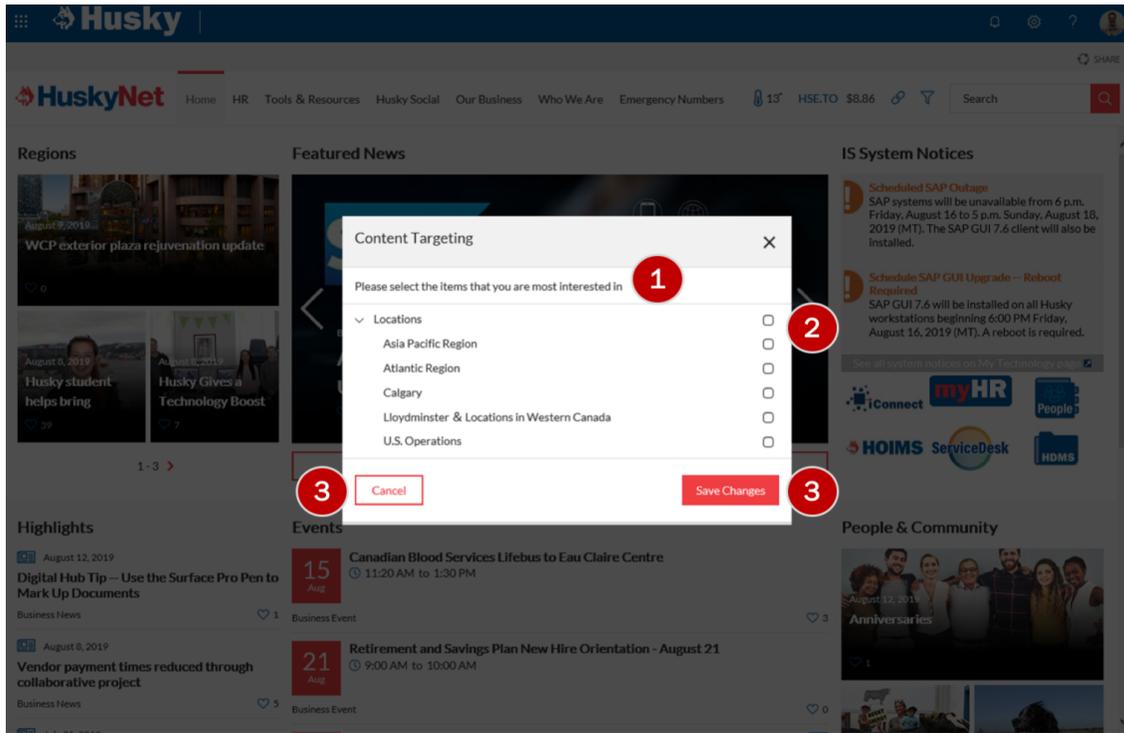


**Image 87. Husky Energy Intranet Preferences.** HuskyNet keeps news targeting abundantly simple by allowing employees to select regions.

*HuskyEnergy_05_targetedcontent_live.png*

## Preferences Highlights

Employees can select one or more regions to target their homepage content. All other HuskyNet sections show the same content regardless of the user's content-targeting selections.

Clicking the funnel icon in the upper right of the page opens the *Content Targeting* dialog box.

1. **Instructions:** A short note asks users to make selections, and states that content will be targeted based on those selections.

2. **Checkboxes:** Designers employ one of the simplest UI patterns in existence—the checkbox—so employees can check any number of boxes to make their selections.

3. **CTA:** The *Save Changes* button appears in red and is on the right, making it the obvious choice; a *Cancel* button is also available, but is visually demoted with a background color that matches that of the dialog box.

## Employee Safety
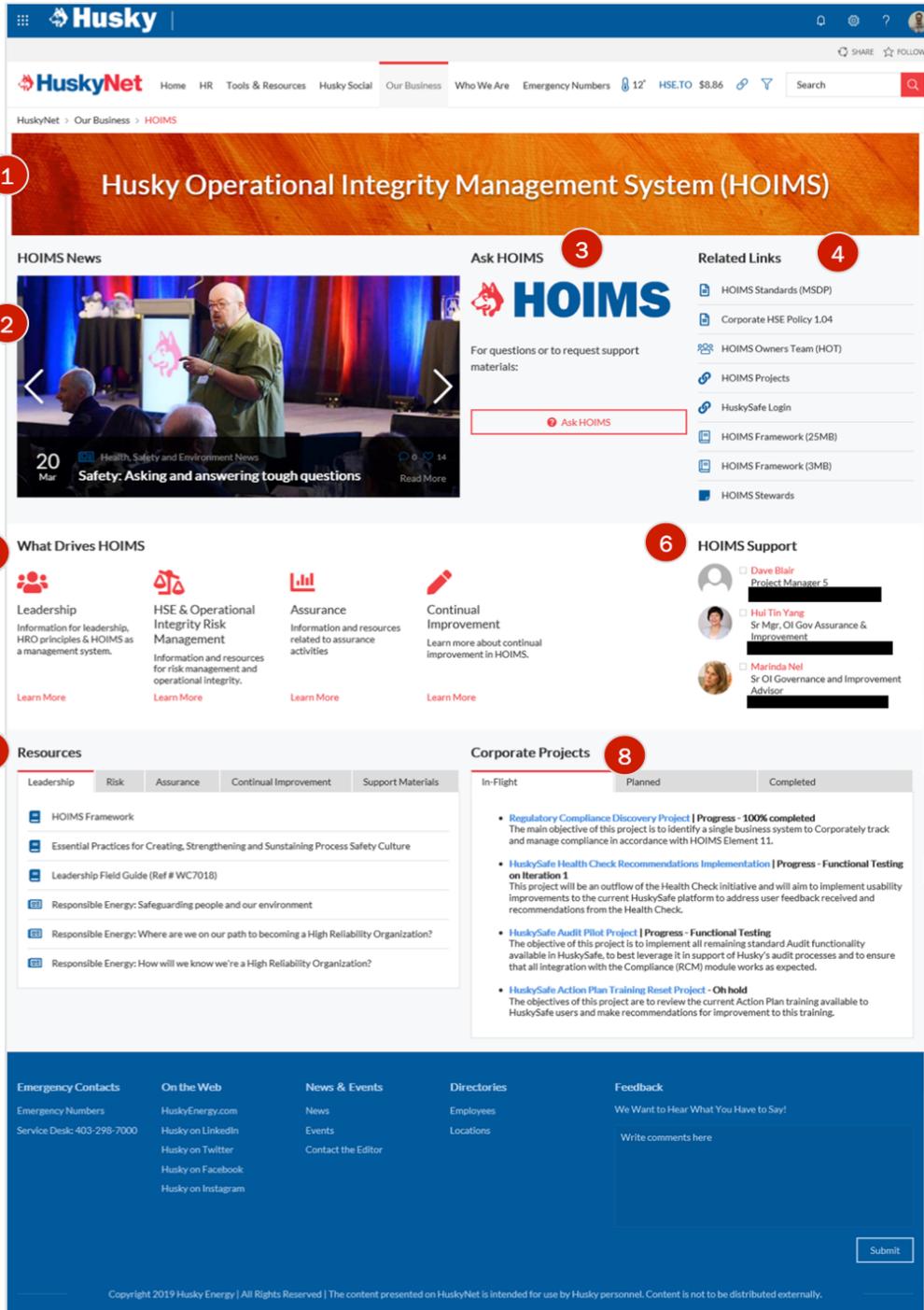


**Image 88. Husky Energy Intranet Operational Integrity Management System (HOIMS).** Employee safety information on HuskyNet helps to ensure that safety is always at the forefront of the organization's operations.

*HuskyEnergy_06_hoims_live.png*

## Employee Safety Highlights

Employee safety is extremely important at Husky Energy. The Husky Operational Integrity Management System (HOIMS) on HuskyNet provides access to a vast number of resources, including tools and documents.

1. **Name:** Like other group pages on HuskyNet, the name of the group appears in a banner at the top of the page.

2. **News:** News related specifically to safety appears in a carousel at the top of the page. Here, employees can learn from and be inspired by successful safety articles.

3. **Ask:** The *Ask HOIMS* section helps employees get answers to specific safety-related questions.

4. **Related links:** The *Related Links* section in the upper right leads to other safety-related materials and resources, such as web pages, apps, and handbooks. These important links are rightfully positioned above the page's fold on desktop.

5. **Segments:** Segments that make up and support HOIMS are listed and briefly described in the *What Drives HOIMS* section. Employees can get further information via the *Learn More* link that appears at the end of each section.

6. **Support:** Like all pages on HuskyNet, the key contacts are listed on the right side for easy accessibility to both leaders and subject matter experts.

7. **Resources:** A collection of safety resources are housed under five tabs located in the page's *Resources* section. Covered topics include all the most important related areas: *Leadership, Risk, Assurance, Continual Improvement,* and *Support Materials.*

8. **Projects:** To keep employees informed of corporate safety programs, the *Corporate Projects* section presents a summary of efforts at Husky Energy. Three tabs—*In-Flight, Planned,* and *Completed*—communicate how far along each project is.

## Emergency Numbers
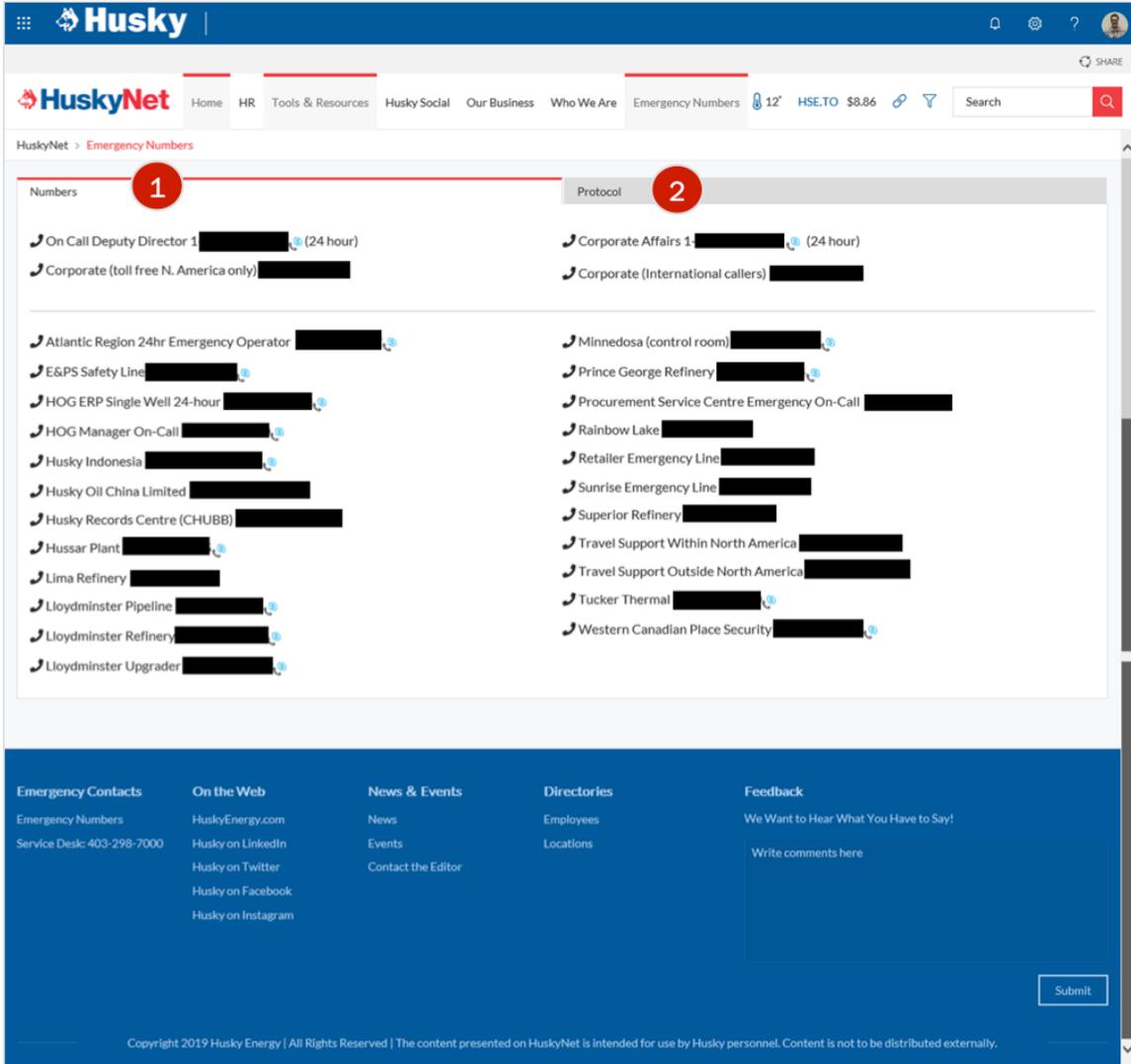


**Image 89. Husky Energy Intranet Emergency Numbers.** This page consolidates a list of phone numbers to call and procedures to follow in the event of an emergency. *HuskyEnergy_07_emergencynumbers_live.png*

## Emergency Numbers Highlights

HuskyNet helps ensure that in the event of an emergency, the situation can be quickly reported, assessed, and managed by providing resource information, including a page of emergency phone numbers.

1. **Numbers:** The *Numbers* tab shows the emergency numbers and the groups to which they correspond.

2. **Procedures:** The *Protocols* tab shows the emergency-related procedures.

# Policy Finder
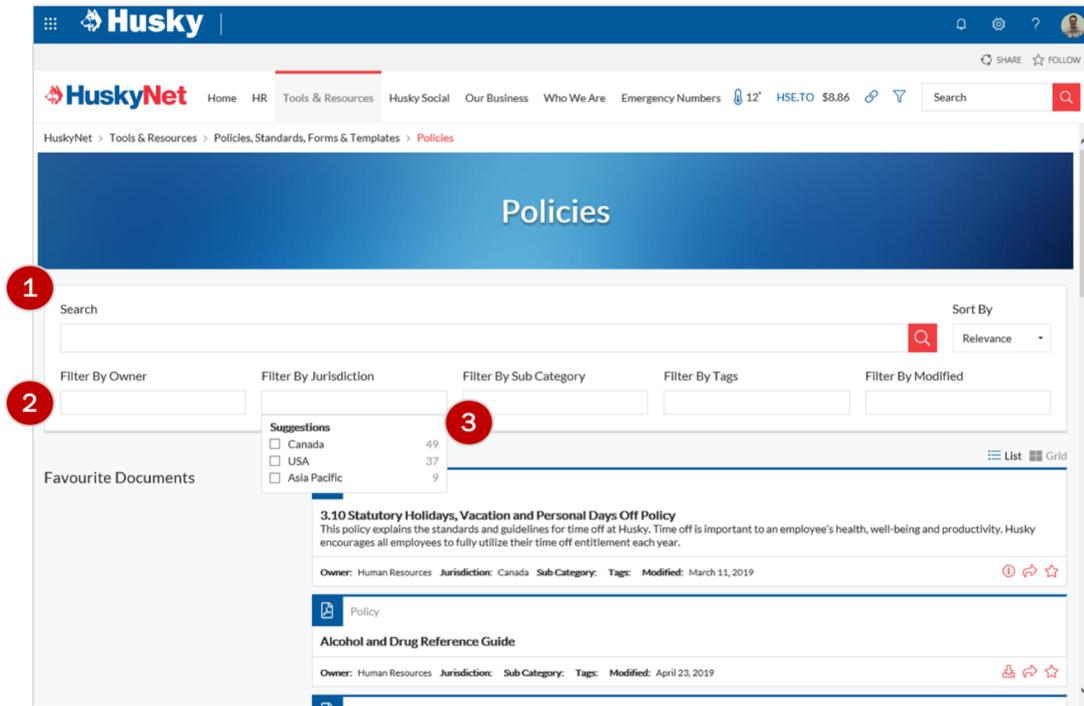


**Image 90. Husky Energy Intranet Policy Finder.** Employees can search for policies using a scoped search function that includes filtering functionality.
*HuskyEnergy_08_searchmetadata_live.png*

## Policy Finder Highlights

With many employees working in multiple locations and doing various (sometimes dangerous) jobs, the need for a large set of internal polices is inevitable. The scoped search in the *Policies* section suggests topics to use for filtering search results to help users find what they need in this large data set. The page also features a unique, yet simple arrangement of the UI filtering elements.

1.  **Scoped search:** The search bar within the *Policies* page content area indicates that the query will be limited to policies only, rather than search across all of HuskyNet.

2.  **Filtering:** Content metadata makes search effective, helping to categorize and filter information on HuskyNet, while facets offer multiple ways to filter the search results. For example, *Owner* shows the name of the policy manager, and *Jurisdiction* details the regions that fall under each policy.

3.  **Drop-down lists with checkboxes:** Facets often appear as a long list of checkboxes with groupings separated by topic category names. An alternative to this UI approach is to arrange the topics horizontally, with the facets displaying as a list of drop-down checkbox items. This arrangement can be effective when there are few topic categories (so they fit across the page) and many facets per category, which might be unwieldy in left-side navigation. It's helpful to let users type in facets so they can jump to them in a long suggestions list. In this and any multiselect list, checkboxes are a simple way to indicate that multiple selections are possible. The number of policies related to each facet appears by the label, helping users to see how many policies there are in relation to a topic.

4.  **Favorites:** If users have added any policy documents to their favorites, they will appear in a list on the left. This makes it especially easy for users to find favorites, as having many favorites in one main list can be cumbersome.

# Locations
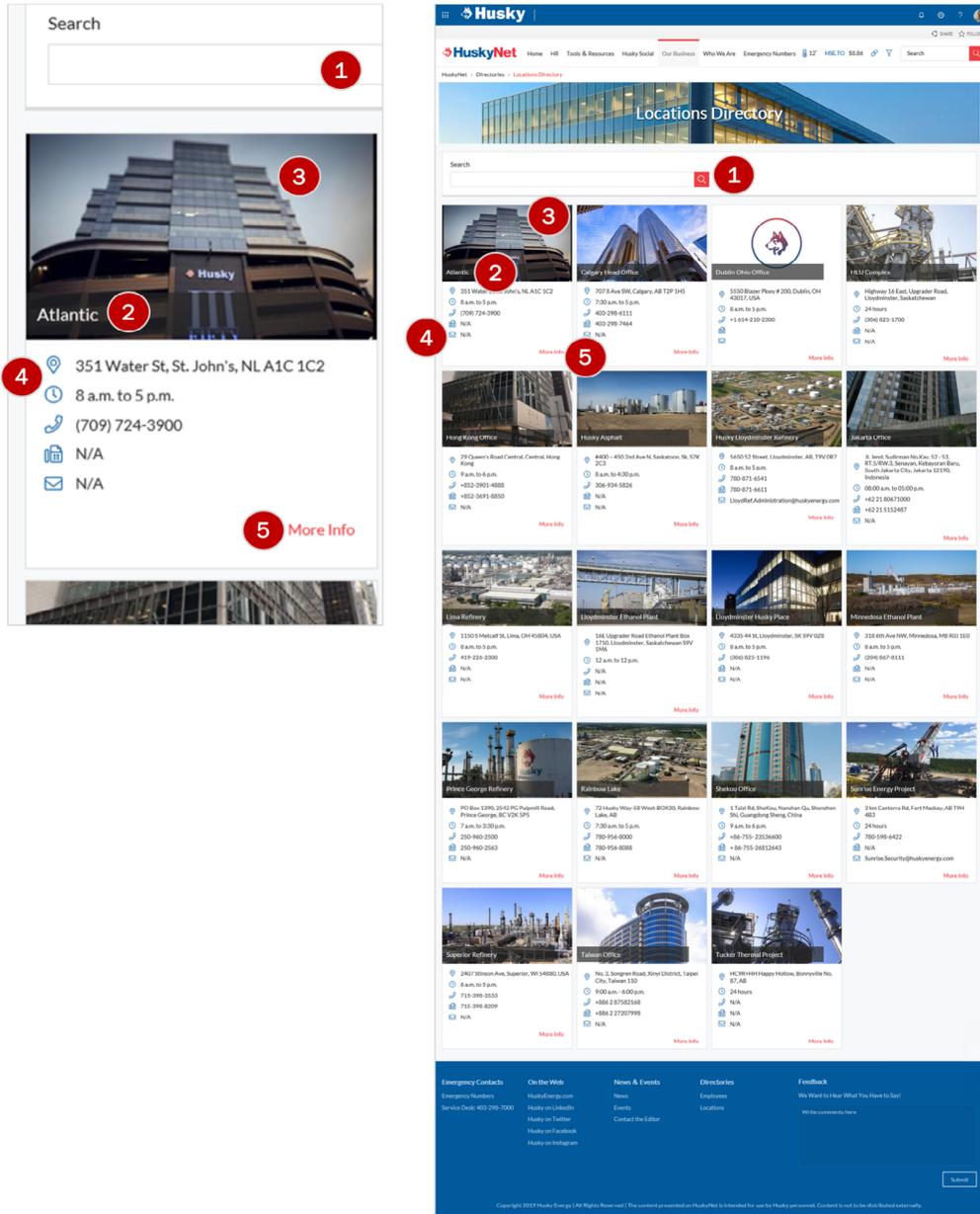


**Image 91. Husky Energy Intranet Location Cards.** These cards offer pertinent information about each Husky Energy location.

*HuskyEnergy_09_locations_page_live-a.png*

## Locations Highlights

Husky Energy has offices and facilities throughout Canada, the US, China, Hong Kong, Taiwan, and Indonesia. Visiting different locations on HuskyNet is a breeze with the *Locations Directory,* which includes cards with basic information for each location.

1. **Search:** Employees can search for a location using the scoped search. Positioning this search field within the page and just above the locations helps communicate that it searches locations only. Of course, the main site search field is never far away for employees who want to search for other elements on HuskyNet.

2. **Location name:** Each location card is labeled with the location name.

3. **Photo:** A photo of the location begins to give people a sense of the place.

4. **Contact details:** When employees travel to a new location, it can help to first talk to someone there—or at least be assured that they have the correct address, phone number, and building hours before embarking on the trip. All of this pertinent information is listed in the location card.

5. **More:** The *More Info* link leads to a page that also includes a street map, a location overview, and a link to the location-specific SharePoint site. Armed with this information, a new or infrequent visitor can feel confident and be more likely to be productive quickly.

# Location Details Page



**Image 92. Husky Energy Intranet Location Details Page.** Each location page describes the sites in detail, and provides a map and list of key contacts.
*HuskyEnergy_10_location_page_live-b.png*

## Location Details Page Highlights

Location pages offer a glimpse into Husky Energy locations—which range from offices to refineries. These pages provide employees a thorough sense of where their colleagues work.

1. **Name and photo:** The location name appears at the top of the page, within a large banner photo that helps employees get an immediate sense of what type of site it is.

2. **Page author:** The person who posted the page is listed along with a photo. This not only gives authors credit and a sense of page ownership, but also helps colleagues determine the right person contact if they have a question or comment.

3. **Contact:** All contact information for the location appears at the top of the page, giving employees an easy way to get in touch with people there or to plan a trip using the information on this page.

4. **Description:** The site description includes pertinent information about the kind of work done at the site. This provides employees with a fuller picture of what and where things are done at their company.

5. **Map:** The map shows the site's exact location.

6. **Social:** Employees can comment on, share, and like location pages.

7. **Contacts:** Key contacts, with a name and photo of the site's executives, are listed in the right rail.

8. **Tags:** Tags (also in the right rail) make the site findable in HuskyNet search.

# Marketplace
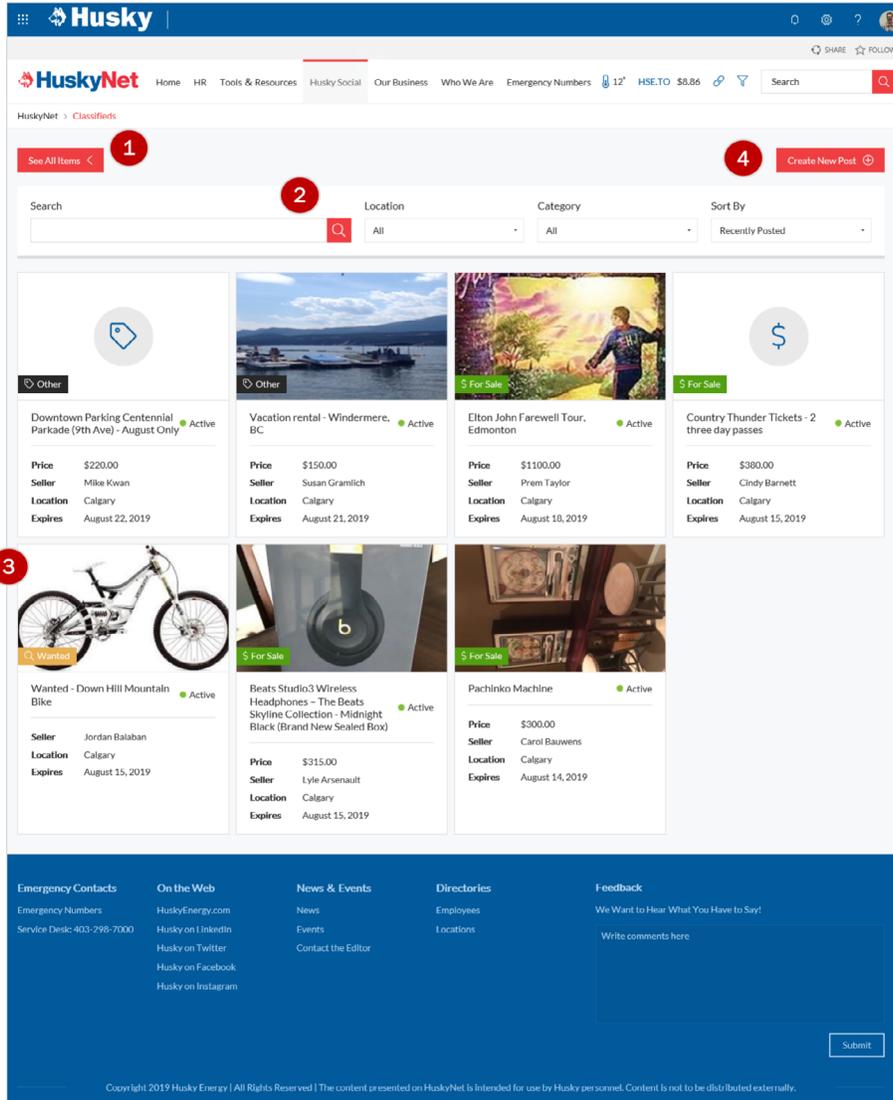


**Image 93. Husky Energy Intranet Marketplace.** This area allows Husky Energy employees to buy and sell items, offering an additional way to engage with one another. *HuskyEnergy_11_marketplace_live.png*

## Marketplace Highlights

Internal classifieds are a benefit for employees, letting them buy and sell things from and to their colleagues. With 8,000 employees, the HuskyNet *Classifieds* provide a rich marketplace where colleagues can engage with one another outside of work topics. Also, having a marketplace of buyers and sellers who all work at the same organization creates the expectation of both credibility and honesty, since people typically want to be highly scrupulous with coworkers.

1.  **All items:** The red *See All Items* button at the top of the page lets users browse available items and scan through the many photos.

2.  **Search and filtering:** The search field and facets help users hone results to only items of interest; results also include when each item was posted, whether it is being sold or sought, and where it is located.

3.  **Items:** Each item wanted or for sale appears in a card that contains a photo (if provided), description, price, name of the seller or buyer, location, and expiration date. Items for sale include a green tag, while wanted items have a yellow tag. This makes it easy for users to scan through the photos to see their status.

4.  **Post:** It's easy to add an item to the marketplace via the red *Create New Post* button in the upper right of the page. This text command is also inviting, encouraging employees to participate.

## Anniversaries
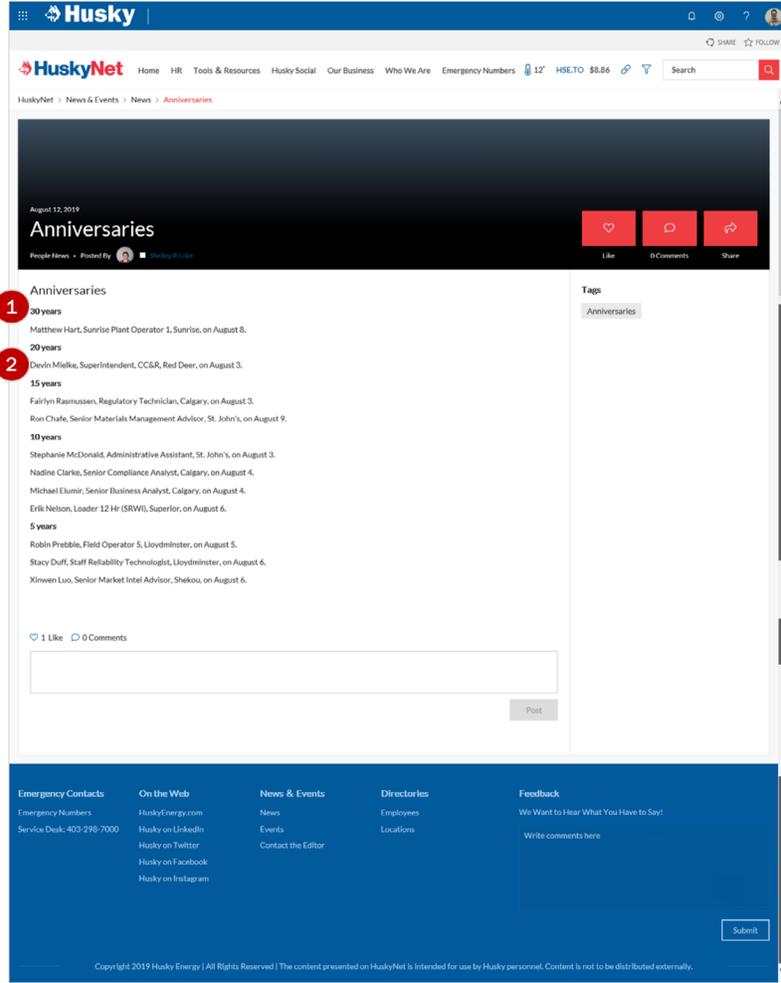


**Image 94. Husky Energy Intranet Anniversaries.** A simple page recognizes employees who have company anniversaries in the current month.
*HuskyEnergy_12_employeerecognition_live.png*

## Anniversaries Highlights

Having work anniversaries on HuskyNet for all of their colleagues to see helps employees feel recognized.

1. **Years:** Subheadings for five-year increments are listed.

2. **Anniversaries:** Employees celebrating an anniversary are listed along with their name, job title, location, and anniversary date. Armed with such information, colleagues can then congratulate them.

## Group Page (Information Services)
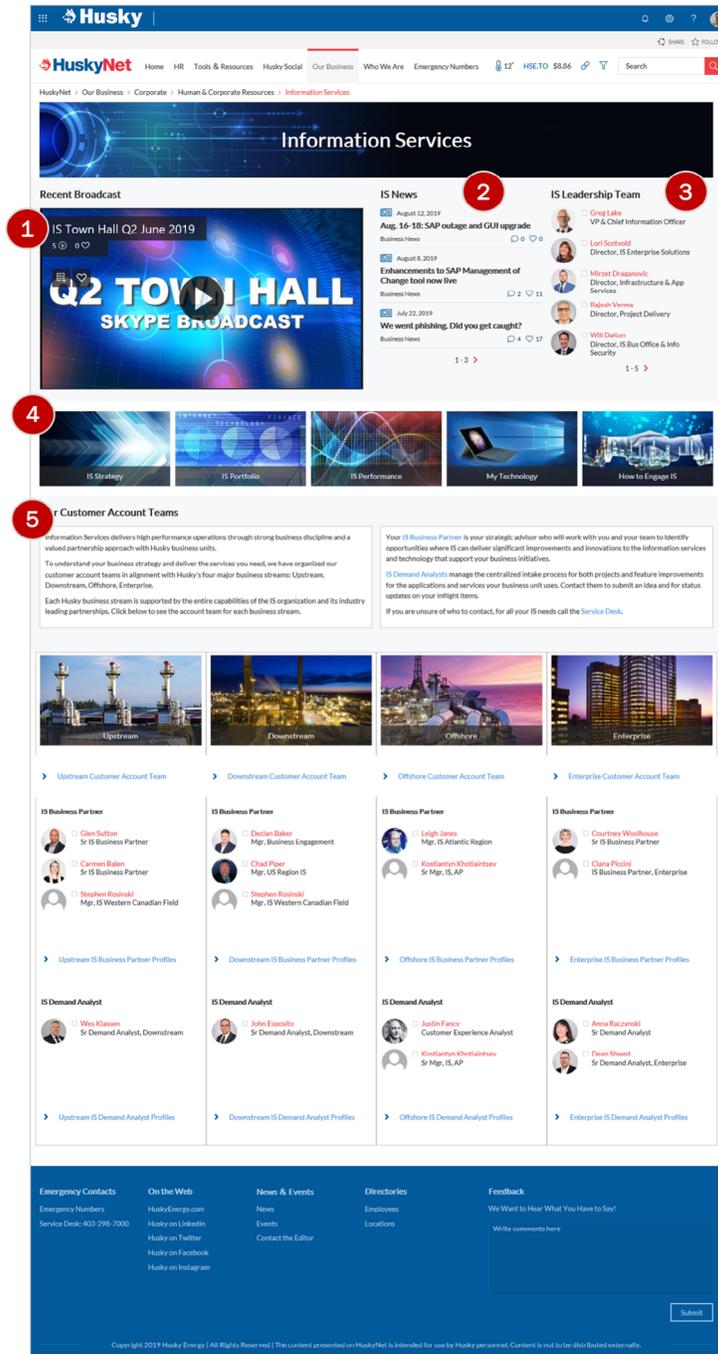


**Image 95. Husky Energy Intranet Group Page.** HuskyNet departments, such as Information Services, provide pages that include department-specific information. These pages help HuskyNet employees become more familiar with the departments across the organization.

*HuskyEnergy_13_embedded_stream_video_live.png*

## Group Page (Information Services) Highlights

HuskyNet Group sections inform employees about what various groups do and how to work with them. For example, the Information Services group offers myriad services to employees. The group's section on HuskyNet describes the people in the group and how employees can engage with them.

1.  **Video:** The embedded videos—streaming via Microsoft Stream integration—engage employees at all locations and ensure accessibility. Previously, employees at remote locations did not have the bandwidth available to download video files. They therefore had trouble downloading company videos or had to forego watching them altogether. Within one month of the new intranet's launch, 21 videos were loaded and embedded in HuskyNet's pages and articles and were streamed 2,279 times.

2.  **News:** The top three new items related to the group appear in the center column at the top of the Information Services page. The title, date, topic, and icons for liking and commenting make it easy for users to scan and interact with group news. The *1-3›* pagination links to more group news. The section title, *IS News,* informs users that the news is related only to IS.

3.  **Leadership**: Five team leaders—all VP- and director-level managers—are listed under the page's *IS Leadership Team* section, which shows their names (which link to longer profiles), titles, and photos, introducing the group executive team to all Husky Energy employees. The *1-5›* pagination links to additional IS leaders. Listing the leaders helps to encourage two-way communication between employees and leadership, and helps to create a more informed and collaborative culture.

4.  **Group work:** Across the center of the page, large buttons link to information about the team's work, including *Strategy, Portfolio, Performance,* and *How to Engage*.

5.  **Working with the team:** Beyond how to engage with the team, the *Our Customer Account Teams* section discusses how the IS group works and what employees can expect when working with them. It also discusses the value of working with the team and how doing so benefits the business. The section states, for example, that, "…*we have organized our customer account teams in alignment with Husky's four major business streams: Upstream, Downstream, Offshore, Enterprise.*" Four columns appear below the summary, each listing one of the four business streams. The columns contain the name, title, and photo of the partners and analysts on the account teams.

# Regional (Atlantic) Main Page
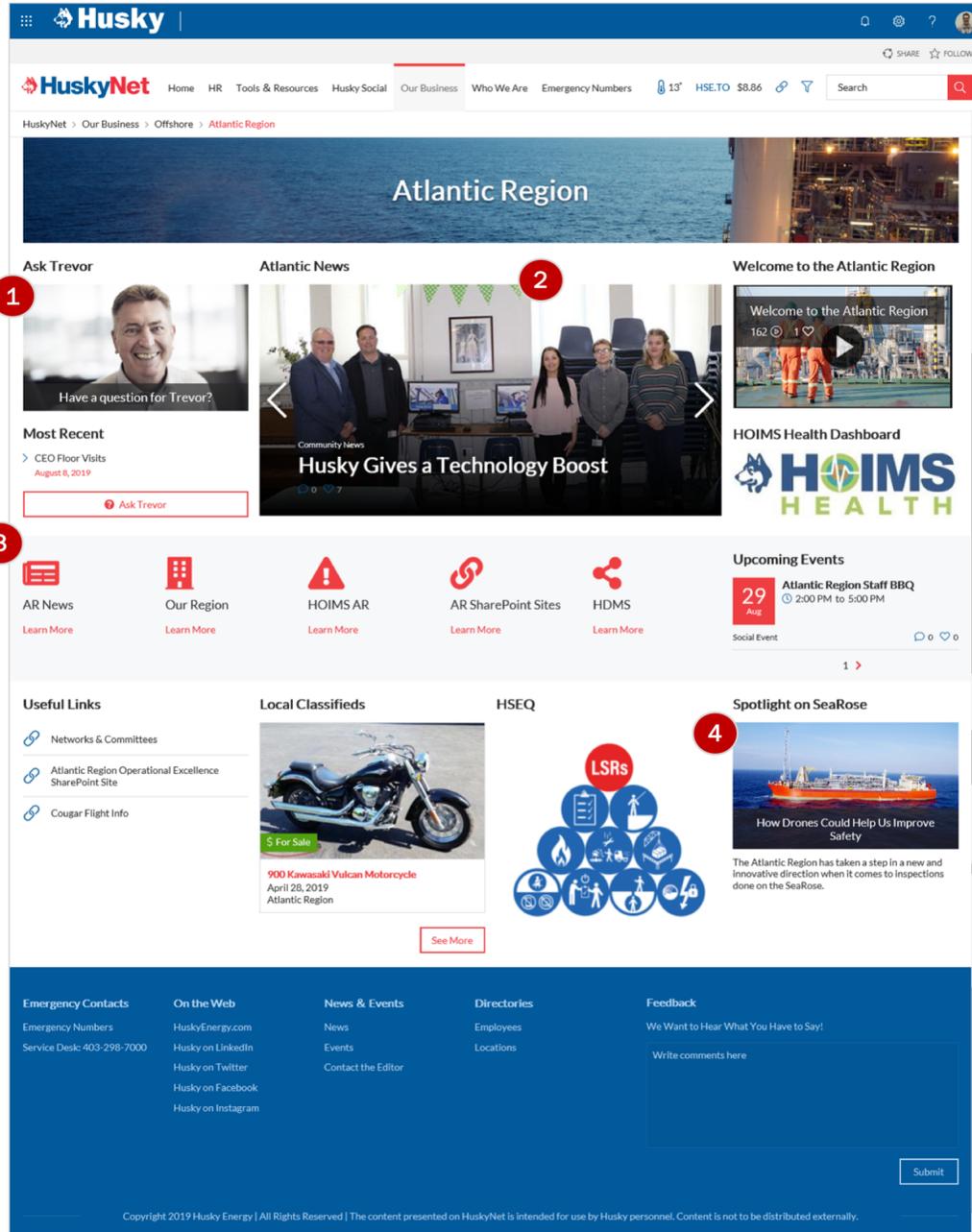


**Image 96. Husky Energy Intranet Regional (Atlantic) Page.** Here, employees can read the latest news and information related to the Atlantic region.
*HuskyEnergy_14_altanticregion_live.png*

## Regional (Atlantic) Main Page Highlights

Employees can access location-specific sections of HuskyNet to see the latest news and resources related to a region. People who work between locations, or who manage teams across multiple locations, can switch the location to view the page related to another region.

1. **Leadership communication:** HuskyNet encourages two-way communication between leadership and employees. The popular *Ask Trevor* section enables employees to ask a question directly to the regional senior VP.

2. **News:** News related to the region can be informative and foster a sense of community among employees who work in that region.

3. **Resources:** Important regional tools and resources are visible and appear as icons with links across the center of the page.

4. **Spotlight:** The *Spotlight* section showcases interesting highlights within the region.

## Search Results
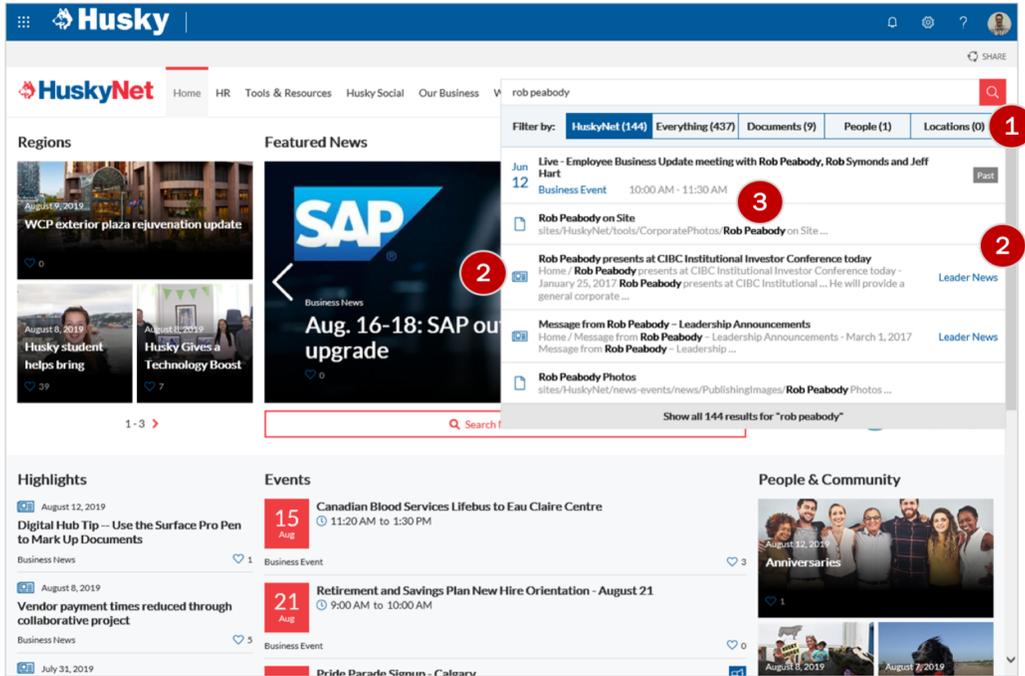


**Image 97. Husky Energy Intranet Search Results.** As a user types a search query, possible results appear in a suggested search list below.
*HuskyEnergy_15_search_result_live.png*

## Search Results Highlights

Search features have come such a long way since we first began studying intranets. Advancements such as the ones HuskyNet employs demonstrate some of the greatest improvements. Its search is not only robust, delivering current and accurate data, but it is also highly functional and flexible as well. For example, as the user types, the most likely results appear in the suggested search results list.

1. **Filter:** Results in the suggested search list can be easily filtered by result type, including *HuskyNet, Everything, Documents, People,* and *Locations*. The number of each result type found appears in the corresponding tab, providing a nice cue for users.

2. **Type of result:** An icon on the left of each list item indicates the medium, such as: meeting, message, or document. A blue text link—such as *Business Event or Leader News*—further describes the medium, and leads to those types of items. The links and icons help employees quickly discern which results might be most relevant.

3. **Query:** The words that match the ones the user typed in the query are bolded in the short description that appears in the suggested search results list.

## Theme Page (Health and Safety)
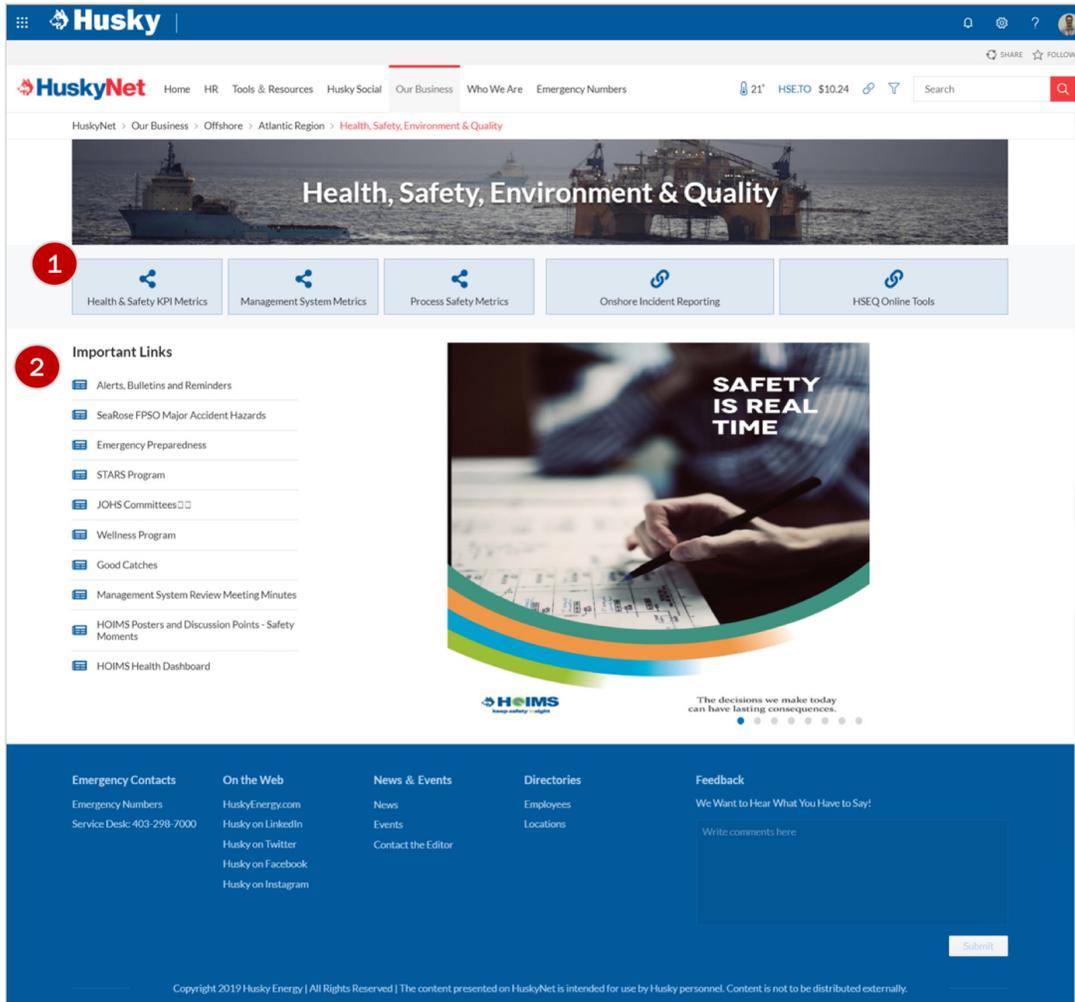


**Image 98. Husky Energy Intranet Theme Page (Health and Safety).** A page related to health and safety appears within the Atlantic region section. *HuskyEnergy_16_HSEQ_live.png*

## Theme Page (Health and Safety) Highlights

The *Health, Safety, Environment & Quality* page relates to HuskyNet's *Atlantic Region* section and features important safety information for employees.

1. **Metrics and reporting:** Links to various metrics and reports—such as *Health & Safety KPI Metrics, Management System Metrics, Process Safety Metrics, Onshore Incident Reporting,* and *HSEQ Online Tools*—appear as buttons at the top of the page. This makes them easy to discover, find, and access.

2. **Links:** The *Important Links* list on the left side of the page lists helpful resources about popular health and safety programs. Since the organization is so focused on safety, its no surprise that these links are exposed and easy to find.

# DESIGN PROCESS AND USABILITY WORK

## Designing with an Eye Toward the Future

Employee input was requested and encouraged throughout the new intranet's design and implementation. The design team wanted to prepare employees for the upcoming organizational changes that would result from having a new platform for disseminating news, accessing information, and collaborating; it therefore wanted employees to be involved in its creation. With that in mind, the Husky intranet team spent considerable time conducting research and surveys aimed at assessing organizational needs prior to procuring the new solution. It was important that the new intranet adequately meet the company's overall objectives to enhance internal communications and facilitate employee engagement across all regions and around the globe.

The team was determined to create an intranet platform that would meet both the current and future needs of such a global organization; the project therefore kicked-off with the creation of a detailed *Project Charter* document that defined the project's critical components:

- Objectives
- Critical success factors
- Approach
- Risks and mitigations
- Team roles and responsibilities
- Organizational structure
- Approvals

## Partnering with an Agency

One of the reasons Husky chose Bonzai Intranet as its project partner was because of its expertise and proven approach to solution delivery. Bonzai also had a solid grounding in content messaging, management, and design, so the project team adopted its Solution Delivery Framework within the Husky project delivery process. The comprehensive delivery approach included five key stages:

- **Research:** Understand current state, customer business/industry, and customer intranet needs.

- **Make recommendations:** Utilize intranet best practices to configure Bonzai to meet customer requirements.

- **Validate design:** Confirm recommendations with customer, test assumptions, and finalize design.

- **Gain approvals:** Approve requirements, colors, and IA prior to installation.

Project activities included:

- Content audit
- Content intranet scope definition
- Intranet questionnaire
- Current analytics review
- SharePoint Online design configuration
- Intranet color and themes definition
- Content planning and preparation for authoring and migration
- Category and landing page planning and configuration
- Site structure review
- Tree testing and content structure validation
- Metadata and landing page validation
- Governance planning
- Intranet installation and configuration
- Content author/power-user training
- User acceptance testing
- Content migration
- Content authoring

## Determining the IA with User Input

In its quest to create the optimal IA for a global organization, the Husky intranet team conducted card-sorting exercises and validated those results with tree testing.

Card sorting helped the team understand how different users group their information, as some users approach this in a task-based manner and others in a topic-based manner. Because the end goal was to create an IA that would benefit all users, it was important for the team to understand these different approaches rather than simply impose the corporate structure onto the IA. Then, once the card-sorting activities were complete, the team conducted tree testing to test the hypotheses generated in the card-sorting activities.

Surveys, card sorting, and tree testing helped engage users in the project, but it was acknowledging employee requests and actually implementing their suggestions that made the biggest impact on buy-in and helped the team generate excitement for the new intranet. It's one thing to listen to users' needs; it's another to put that feedback into action.

A good example of how the team translated user needs directly into design is the megamenu.

Because Husky Energy was combining four different sites into one, the team had to make sure that the design would work well across all regions and that employees would know where to find the resources they were looking for. The design team thus spent considerable time developing the megamenu's architecture. It did this by liaising with users across various departments and regions and conducting card-sorting and tree-testing exercises to ensure that the menu met the needs of the global organization. The resulting menu design doesn't take up a lot of space on the screen, but it expands to provide more drop-down content when hovered over. It facilitates easy navigation and is intuitive and well organized.
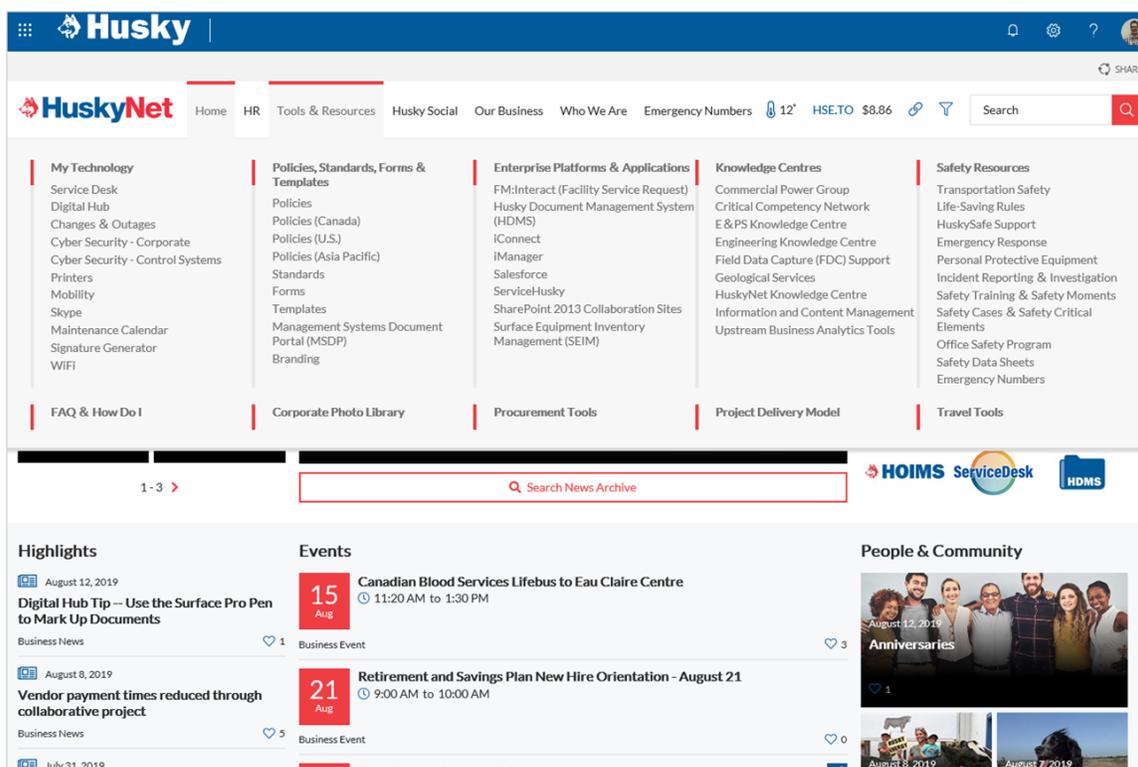
**Image 99. Husky Energy Intranet Megamenu.** HuskyNet has an extensive megamenu that can be found on every page. The megamenu's *Tools & Resources* section (shown here) is the most extensive section, offering users access to all HuskyNet tools and resources. *HuskyEnergy_17_megamenu_live.png*

## Engaging with Users Throughout the Project

The intranet team helped smooth the transition to the new intranet by maintaining regular communication with employees throughout the project. Keeping them involved at all stages minimized frustration as they transitioned to new ways of accessing news and source information, finding other employees, and accessing internal communications.

While this user-centered process was lengthy and detailed, it was certainly worth the effort. Not only did it help team members identify aspects of the new intranet design that were not working early on, but it also helped them see roadblocks that might otherwise have gone undiscovered until later in the project when it would have been too late to incorporate changes or address the shortcomings.
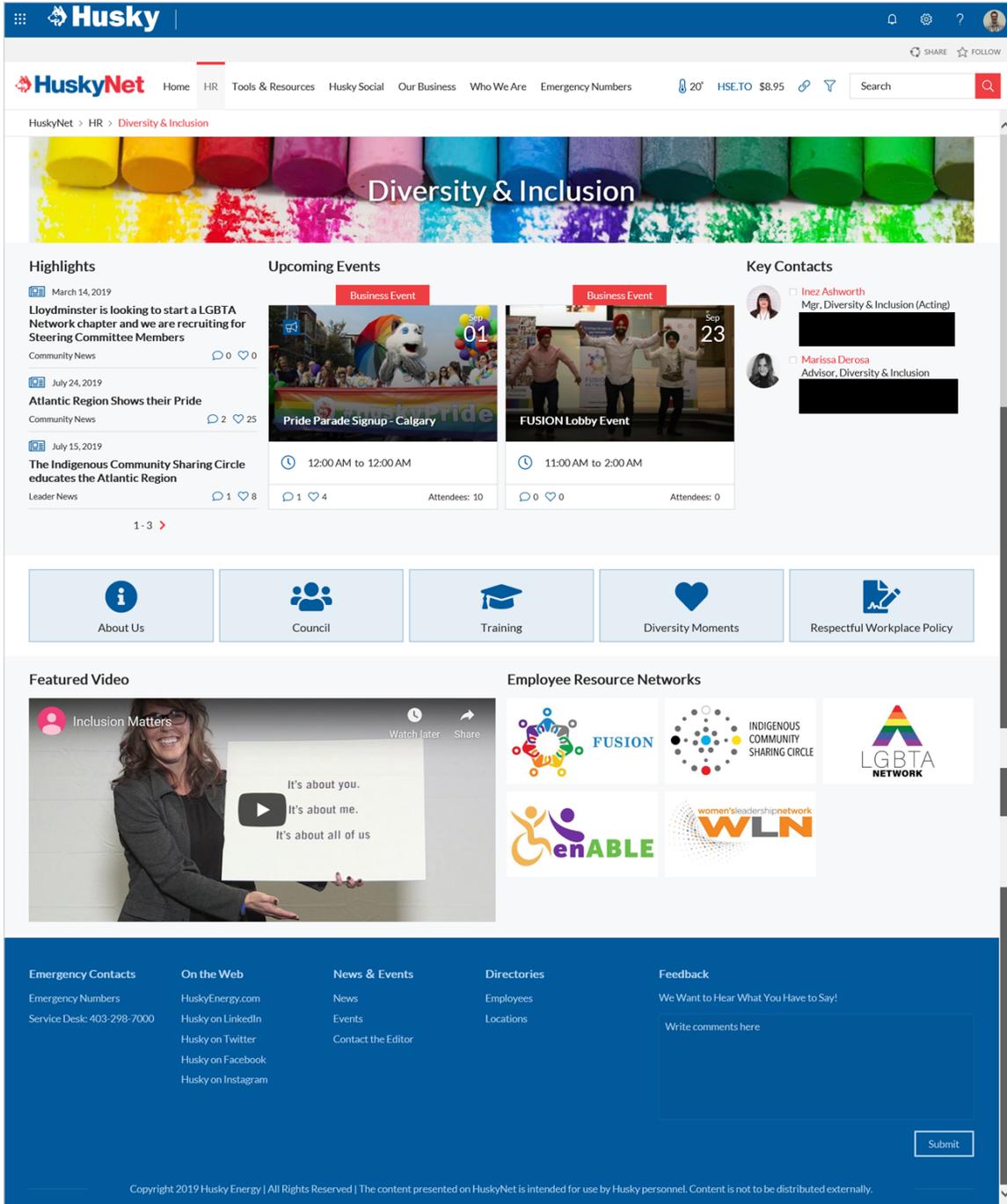
**Image 100. Husky Energy Intranet Diversity Page.** The HuskyNet design adapts and changes to provide the best possible layout and content design based on the content and feature requirements of sections and departments. This page shows news and events focused on *Diversity & Inclusion*, and offers users tools to learn more about this important aspect of the Husky Energy culture.
*HuskyEnergy_18_diversity_inclusion_live.png*
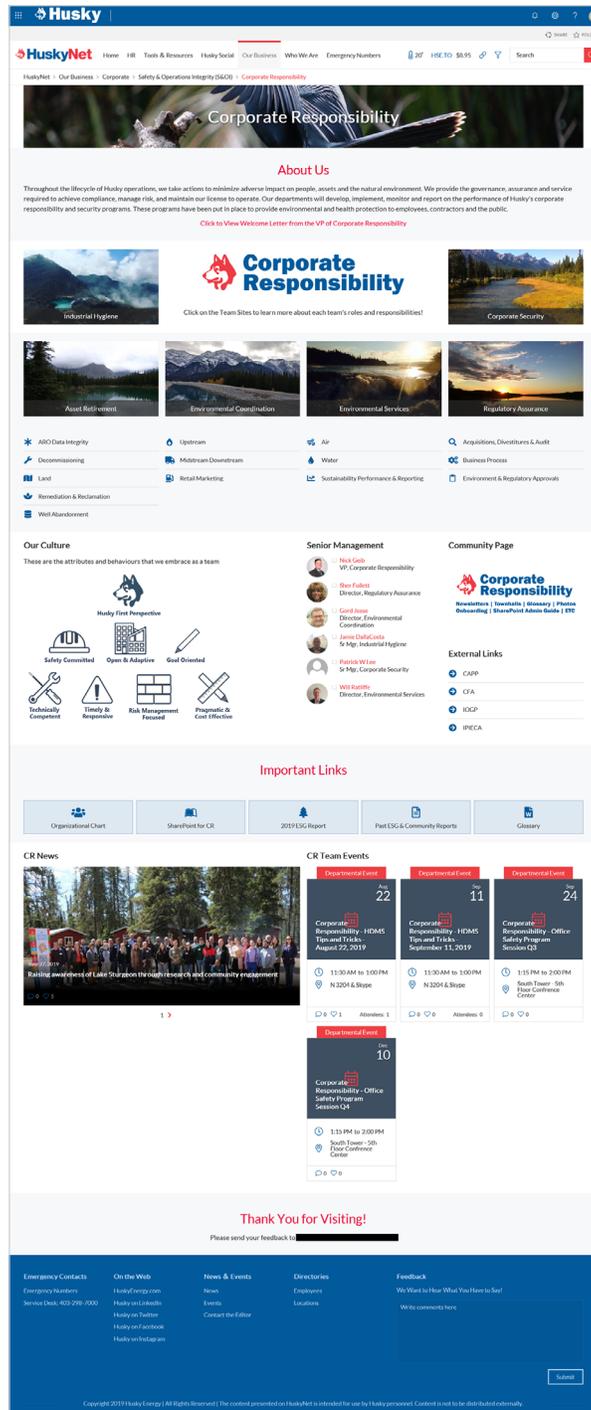
**Image 101. Husky Energy Intranet Corporate Responsibility Page.** The Corporate Responsibility department supports the company's mission to be a responsible corporate citizen. This page shows news and events specific to that group as well as links to the pages of the department's different subteams. *HuskyEnergy_19_corporate_responsibility_live.png*

## Adoption/Buy-In

The intranet team found that engaging in regular company-wide communication and, where possible, involving employees in the intranet design, greatly contributed to building excitement for the new intranet and achieving early buy-in. Employees especially enjoyed having their voice, ideas, and suggestions heard. Even when employee suggestions were not viable options, the employees remained interested and engaged in the project.

One key activity that contributed to creating buzz prior to the launch was having employees upload their photos into their Office 365 profile. A photo booth was set up in the lobby so that employees could get their headshots taken; a HuskyNet article—published at the same time—provided instructions on how to upload the photos. Having employee photos uploaded prior to the launch resulted in a robust employee directory.

| Working with Outside Agencies | |
| --- | --- |
| Agency | Project Role |
| Bonzai Intranet | • Delivered the platform, layered on top of Office 365/SharePoint Online<br><br>• Led the Husky Energy project team through the design of the deliverables required for IA, infrastructure readiness, content planning, intranet design, governance, user testing, training, implementation/launch, and change management |
| Betach Solutions | • Provided the Solutions Architect and two custom solutions during the project<br><br>• Provides ongoing support for SharePoint Online and HuskyNet |

# GOVERNANCE

## Ownership

The Corporate Communications team owns the HuskyNet news content and is thoroughly impressed by the new product. Now, the Corporate Communications team has a reliable platform for communicating with the entire workforce, something that was not previously possible.

The Information Services Group owns the SharePoint Online platform as well as the Bonzai application.

| Intranet Team Responsibilities | |
|---|---|
| Role | Responsibilities |
| HuskyNet Governance Team | • Provides governance, program management, coaching, support, and evaluation of content owners |
| Content Owners (COs) | • Provide updates and ensure consistency in their section's content |
| HuskyNet Support Team | • Supports governance team and COs<br><br>• Works with support organization and vendors to address issues and software updates |

## URL AND ACCESS

| Access Information | |
|---|---|
| Item | Status |
| URL | https://huskyenergy.sharepoint.com/sites/HuskyNet |
| Default Status | The intranet is set as each user's homepage, and users cannot change this setting. |
| Remote Access | HuskyNet is available from any internet-connected device with a browser, but users must log in using multifactor authentication.<br><br>All corporate devices have a shortcut icon for convenient access to the mobile intranet. |
| Shared Workstations | All of the company's office and field personnel have a Microsoft Surface that they use to access company systems and the intranet.<br><br>Plant operators have shared workstations, where they can log in to the intranet with their own account at the start of their shift. They can also use the workstations to access other company systems. |

## TIMELINE

| Project Milestones | |
|---|---|
| Milestone Date | Milestone Description |
| July 1998 | First Husky Energy intranet created |
| August 2017 | New intranet project kick-off<br><br>Intranet project team created |
| February 2018 | Product selection finalized |
| Summer 2018 | User testing of initial design<br><br>Experience validation testing |
| November–December 2018 | User training for COs, content authors, power users, and administrators |
| January 2019 | Employee photo booth used to provide employee directory profile photos to promote new intranet at Husky headquarters in Calgary, Alberta |
| February 18, 2019 | New HuskyNet launched |
| **Overall redesign timeframe:** 18 Months | |

## CONTENT AND CONTENT CONTRIBUTORS

### Content Migration and Culling

Transitioning content from the old platform to the new one was done with care. Existing content on the previous intranet and within each unit's team SharePoint environment was audited and approved before it was published to HuskyNet pages. Selection methods varied per unit, as resourcing and content availability differed greatly from one area to another.

Content on the new platform is much more diverse than it was on the old platform, where all content was curated by the Corporate Communications department with little or no outside input. Now, having input from across the global organization has greatly increased the diversity of available content.

This openness has also helped encourage outlying business groups to fold their content into the new intranet. For example, the Atlantic Region previously administered and maintained a completely separate intranet for its region. It now has a subsite on HuskyNet and remains active in building that subsite and publishing new content.

In addition to migrating content from the old platform to the new one, the team made an effort to reduce and improve the content offerings. The Husky intranet team liaised with contacts across the company's regions to conduct a content audit prior to porting old content onto the new platform. The audit's goal was to determine which content from the four old intranet platforms needed to be moved, and which content needed to be rewritten or deleted. Bonzai provided a content audit template that guided the team through a methodical approach that streamlined the audit process.

## Content Owners

HuskyNet currently has approximately 30 content owners (COs) across the business. These COs are given advanced knowledge of platform changes and serve as the point of contact for the business unit or area when content changes are required. They are the direct liaisons between their teams and the SharePoint specialists and communications advisors. Some COs were chosen by management as part of their job function, while others had previous SharePoint experience and were happy to take on their unit's update duties voluntarily.

## Training

Along with the new intranet came the need to train a more diverse set of content contributors to serve its needs. Thus, a HuskyNet Content Owner Community was created, which includes:

- A standards and guidelines workshop
- Technical training sessions
- Ongoing CO support from Corporate Communications
- Quick reference guide creation
- Leadership engagement

Only COs and SharePoint specialists have contribution rights across HuskyNet, and only a smaller communication advisory group can publish company-wide news.

Others types of content training support are offered through various channels.

- **Corporate Communications Advisor Training** helps to improve and maintain high-quality content on HuskyNet by providing:
    - Article submission and standardization training
    - Photoshop photo optimization training and guidelines
    - Support for page updates and advisement on platform capabilities
- **Onboarding.** A four-phase training plan helps to onboard members of the CO group and includes four phases:

- **Phase 1: A one-on-one CO introductory meeting** with a SharePoint specialist and a Corporate Communications representative.

- **Phase 2: Leader approval.** A roles and responsibilities document is sent to leaders and COs asking for written sign-off to confirm and approve the candidate's participation moving forward.

- **Phase 3: Introductory CO "HuskyNet Standards and Guidelines" presentation.** This comprises an intranet overview, site layout, and structure discussion. A message from the project leader is also presented, along with a detailed outline of Corporate Communications' expectations.

- **Phase 4: External contractor support** provides technical training sessions to smaller CO groups. Groups of four to six COs with similar skill levels go through an initial two-hour training block. Further training needs are assessed during this session and scheduled accordingly.

- **Quarterly training:** Husky offers CO training through a third-party consultant. This helps the intranet team advise and modify the content framework and training offerings, as well as adjust any required customizations to the training programs.

## Maintaining Quality Over Time

The intranet team has instituted various measures to ensure that it can continually update and improve the HuskyNet UX. The HuskyNet Management Office (HMO) has set review periods during which it conducts a detailed site overview and solicits feedback from focus groups and management participants. The HMO also continually solicits feedback directly from site users through feedback channels built into the platform, including feedback links and comments on news publications.

# TECHNOLOGY

| Technology | |
|---|---|
| **Category** | **Technology Used** |
| **Web Server Hardware and Operating System** | SharePoint Online |
| **Bug Tracking/Quality Assurance** | HP Application Lifecycle Management |
| **Design Tools** | Baldamiq (for wireframes) |
| | Slickplan (for IA design) |
| | Optimal Workshop's Treejack and OptimalSort (for gathering user feedback on navigation design) |
| **Site Building Tools** | Bonzai |
| **Content Management Tools** | SharePoint Online |
| **Search** | SharePoint search |

HuskyNet is a cloud-based solution with on-premise systems that support various business requirements.

## CLOUD-BASED SYSTEMS

- Microsoft Office 365
- SharePoint Online (SPO)
- SPO User Profiles
- SPO Business Connectivity Services (BCS)
- Bonzai Intranet for SPO (site collection)
    - Amazon Web Services
    - Google cloud services
    - AddEvent service

## ON-PREMISE SYSTEMS

- Active Directory
    - SAP
- Azure AD Connect
- quickAccess (Message Center)

## Technology Evaluation Process

The Husky intranet team shortlisted potential intranet vendors for consideration. Its technology evaluation process included an initial demonstration of the solutions and ran solution trials when possible. This process enabled the team to further explore and analyze the features and technology of each shortlisted solution.

## Replacing Obsolete Technology

HuskyNet replaced four separate systems with a single intranet, achieving a significant reduction in staff-hours—the work of approximately three full-time employees. This has resulted in an estimated $300,000 in annual cost-savings. Also, seven servers were decommissioned, resulting in an additional annual cost savings of approximately $75,000.

# MOBILE

One of the project objectives was to deliver a new digital workplace that would support remote and mobile employees, so HuskyNet is mobile-enabled via responsive web design and is accessible from any mobile device. All information available on HuskyNet is also available to mobile users.

The intranet team pushed a shortcut icon out to all Husky corporate mobile devices to provide easy access to the mobile intranet. This has proven popular for employees who travel regularly, as well as those in remote field locations.

# SEARCH

## Technology

HuskyNet sits on the SharePoint platform, so it uses SharePoint search. Beyond the standard features, Bonzai enhances the search experience with custom meta tagging, documents/people/sites favoriting, and predictive type-ahead search capabilities.

## Filtering and Refinement

Users can refine HuskyNet search results to confine the search to specific content areas such as documents, people, and locations, or they can perform a global site-wide search. The search results refinement functionality depends on the type of content searched. For example, users can refine news article search results by category, tags, and date, and refine general search results by content type, author, tags, and date.

## Maintaining Search Quality

Each month, the Husky intranet team runs and analyzes search reports so that it can provide "Best Bet" search results for the most popular search terms. This exercise ensures that the most searched-for content is presented first, even as content changes.
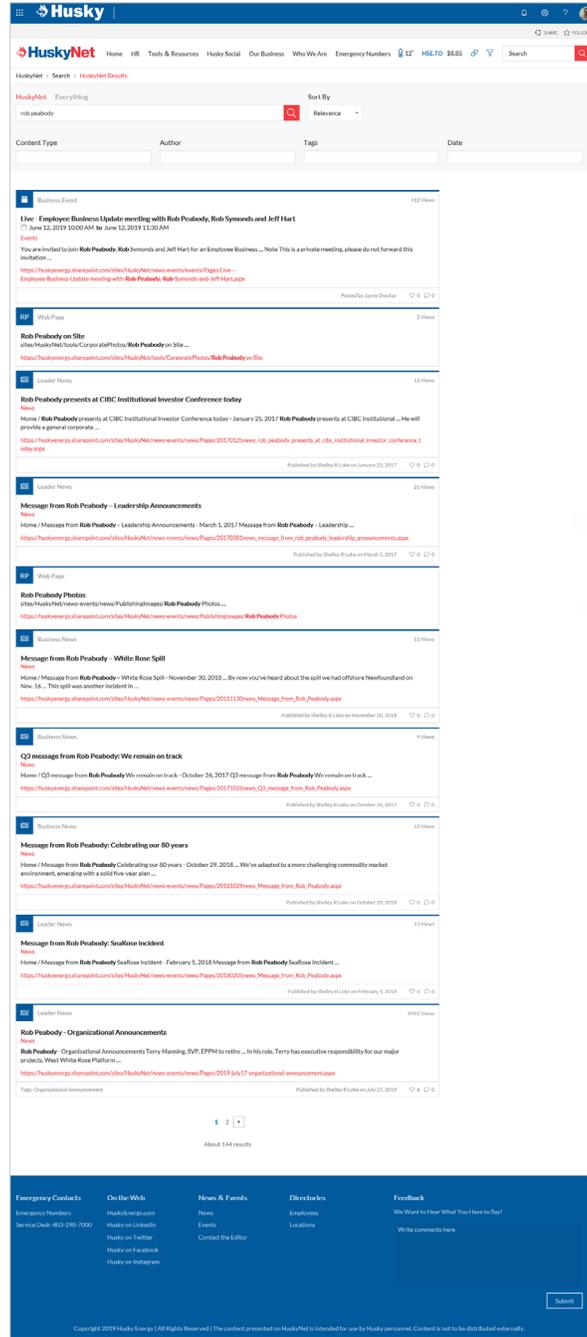
**Image 102. Husky Energy Intranet Search Results Page.** When a user enters a search query on the ribbon and hits enter, this full search results page displays. The user can then further refine the results based on content type, author, tags, and date. *HuskyEnergy_20_search_result_page_live.png*

## ROI

In the first six months since launch, HuskyNet has yielded significant positive results in terms of measurable ROI and KPIs; it has also resulted in improvements across softer internal measures such as employee satisfaction, user feedback, and company-wide corporate communications. Other positive results include the following.

### Enhanced Productivity

- **Better search:** Within one month of launch, there was a notable increase in search activity on the new platform. In the first month, HuskyNet performed an average of 235 searches per day—a 1,075% increase over previous search measures. The old intranet was searched 20 times per day at most because many employees felt the search results were unreliable.

- **Targeted/customized content:** Employees now access location-specific intranet homepages when they launch their web browser, ensuring that they have quick access to relevant information. Employees who travel or manage teams across multiple locations can switch their location to view the latest news and information from specific regions.

### Engagement

- **Page views:** There was a 400,777 increase in page views in the first two weeks of the new intranet's launch compared with the same period the previous year.

- **Engagement:** Time spent on HuskyNet has almost doubled since launch. Within the first month, the team saw a significant increase in the number of users accessing HuskyNet as well as in the duration of time spent on the site. Since launch, the number of visits has tripled. In one month in 2019, 73,380 visits were logged, while in the same month in 2018 there were only 23,944 visits. Users now spend an average of six minutes and seven seconds on the intranet, whereas the previous intranet was keeping employees engaged for an average of only three and a half minutes.

- **Social interaction:** HuskyNet has encouraged employees to engage in online social interaction, an option that the old intranet did not offer. In the first few months since launch, more than 200 comments and 1,880 likes have been logged on articles. These numbers are likely to rise as employees become more comfortable with the new social features. Staff members can also comment on articles and receive responses from their colleagues. This feature continues to gain momentum.

- **Feedback:** The previous intranet had no feedback mechanism. Intranet team members have greatly benefited from the new intranet's feedback form and outstanding qualitative feedback; they got 88 feedback submissions in the first month alone.

## Cost Savings and Waste Reduction

- **Cost savings:** The new HuskyNet has helped the organization save money in several ways, including significantly reducing person-hours—by approximately three full-time employees—which has resulted in approximately $300,000 in annual cost-savings. Cost savings have also come from decommissioning seven servers—an approximate savings of $75,000 annually—and by ceasing the publication of newsletters for field employees who previously could not access HuskyNet.

- **Waste reduction:** HuskyNet was utilized to communicate with Canadian regions about a new process for accessing T4 tax forms. In the past, these tax forms were mailed out to employees; this year, however, Husky Energy was able to publish a news article that gave employees a link to download their T4 tax forms directly, resulting in cost savings and waste reduction.

## LESSONS LEARNED

The HuskyNet team shares some of its project lessons:

- **Communicate changes widely so employees know where things have gone.** "The old intranet had been used as a collaborative workspace as well as a communication tool so, as part of the new intranet implementation, the project team decided to move the collaborative information to Microsoft team sites so they could utilize the intranet primarily for corporate communications. The way this was done proved to be a misstep. Collaborative information was moved to Microsoft SharePoint sites, but the intranet team was ineffective in communicating this move to staff. Next time, we would communicate with teams well in advance and provide maps to help employees to locate content that was moved. This would have helped to avoid questions and feedback from employees wondering where the information was moved."

- **Keep employees engaged throughout the project.** "The intranet team highly recommends engaging with employees throughout the project. This ensures engagement through the process and helps to generate excitement. We found this approach useful and gained a lot of knowledge and insight that helped steer the project, as well as smooth the transition to a new intranet and encourage user buy-in and uptake."

- **Ask what users like and use.** "The project team forgot to ask an important question on the initial employee survey: 'Which links/content/functions on HuskyNet do you use the most and/or can't you do without?' This would probably have saved the team time and worry if this had been included in the initial survey. It would have saved calls from users wondering where the links to their apps were and a scramble to get those added to HuskyNet."

- **Plan for success and the technology needed to support it.** "There was a dip in website performance when we deployed the new intranet. For other organizations engaging in a similar project, it might help to make Microsoft aware of the deployment in advance to prepare for the increased load in the tenant."

# Korn Ferry

## OVERVIEW

### COMPANY

Korn Ferry is a global organizational consulting firm, synchronizing strategy and talent to drive superior performance for its clients. Korn Ferry helps companies design their organization—the structure and the roles and responsibilities—as well as how they compensate, develop, and motivate their people. Just as important, Korn Ferry helps organizations select and hire the talent needed to execute that strategy.

**Headquarters:** Los Angeles, California

**Company locations:** Korn Ferry is a global organization with more than 100 offices in over 50 countries.

**Locations where people use the intranet:** Korn Ferry employees at all locations use the intranet.

**Annual revenue:** Annual fee revenue of $1,926 million FY19 reported June 2019

### THE INTRANET

**Users:** Korn Ferry encourages employee enablement through Fuse, effectively pulling all of Korn Ferry under one digital roof. Fuse provides a full range of tools and apps from a single entry point, allowing its 10,000+ users to search for information across systems and apps, contribute knowledge, receive company news and personalized content, and engage with communities across the firm. These users include both client-serving roles and business functions.

**Client-serving roles:**

- **Consultants** partner with clients to solve their organizational and talent challenges.
- **Solution architects and product managers** work with consultants and clients on tech-enabled talent solutions.
- **The Institute and Knowledge & Research teams** provide colleagues and clients with insight and IP across a broad range of industries, functions, and topics.
- **Project managers and admins** provide the necessary support and structure for client work.

**Business functions:**

- **Corporate professionals** in Finance, IT, HR, Marketing, Legal, and Operations departments.

**Mobile approach:** Responsive web design

**Technology platform:** SharePoint Online

### TEAM

**Design team:** An in-house team of five people, called the Collective Intelligence Task Force, worked with ClearPeople, an external digital consultancy.

**Executive sponsors:** Bryan Ackermann, CIO; Doug Charles, President, Americas and Global Consumer; Robert Rozek, EVP, CFO, and Chief Corporate Officer; Jean-Marc Laouchez, President Korn Ferry Institute; Mark Arian, CEO, Advisory; Jill Wiltfong, SVP, Chief Marketing Officer

**Collective Intelligence Task Force:** Erin Evans, Senior Director, Strategy and Collective Intelligence; James Dooney, Senior Director Office 365; Peter Jacsman, Digital Workplace Manager; Alie Koopmans, Digital Workplace Manager; Brandon Pittman, Digital Specialist

## INTRANET TEAM
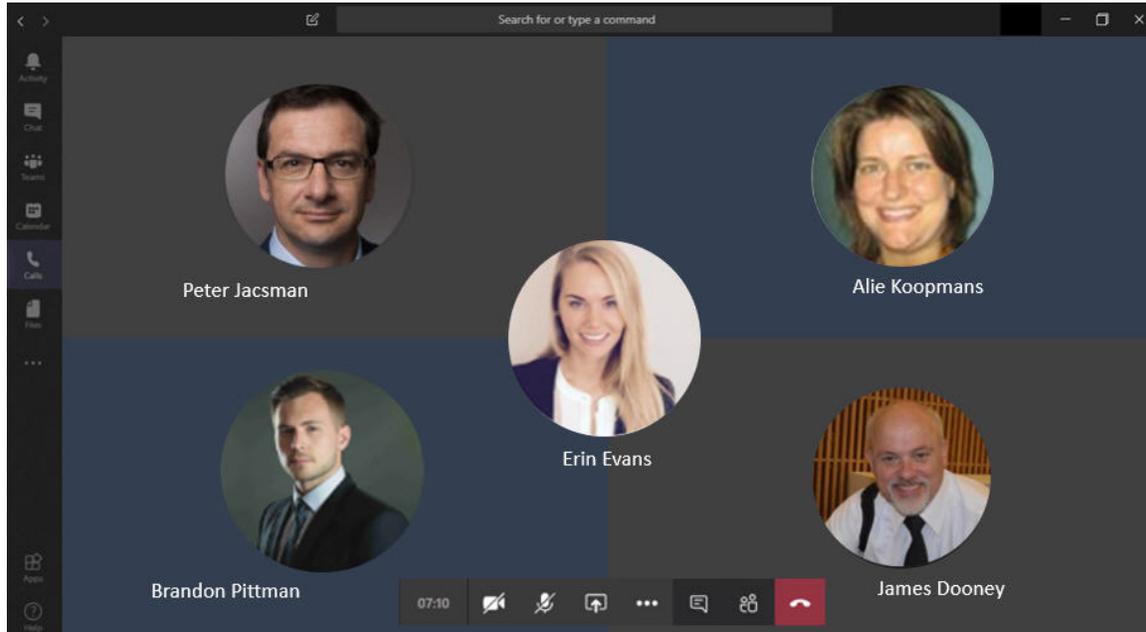


***Team members shown here*** *(left to right): Peter Jacsman, Alie Koopmans, Erin Evans, Brandon Pittman, and James Dooney*

## HIGHLIGHTS ABOUT THIS WINNER

A change in the core business combined with steep growth creates challenges, to be sure. But it also presents an opportunity for Fuse, the company's digital workplace, to ground employees. Fuse gives them the tools to do their work consistently, and guides them to work in a way that matches the business goals and corporate culture.

Fuse helps employees located across more than 100 offices and over 50 countries feel just a few feet away from each other with helpful tools and information about how to work with clients. Collaboration media abounds on Fuse, with various kinds of communities, groups, and social feeds.

- **Client engagement information:** Information about how to best serve clients is peppered throughout. Specifics are handily found in the *Working with clients* section.

- **Social:** Social channels—including Yammer, Twitter, and LinkedIn—are highly visible on the homepage and in the footer, advertising methods employees use to engage and share with one another, as well as Korn Ferry customers and potential customers.

- **Recent and popular:** Fuse makes it easy for employees to discover the newest information, as well as information related to them. For example, the homepage right rail includes client engagements and documents divided by *Recommended* and *Recently Added*.

- **Access to tools and communities:** Fuse connects individuals, but it also aggregates applications in one location: the *Launchpad*. This feature consolidates lists of key groups, business systems, and third-party apps. *Group Explorer* also helps employees discover teams and collaboration areas that pertain to them.

- **Scoped search:** Searching for items contained in only one large body of information—such as client engagements or groups—is made possible through an on-page, scoped search. The main site search searches all of Fuse by default, but the search can also be changed to search for information in a subset of content.

- **Customization:** By choosing their preferences, employees can be served specifically what they want in areas such as news, alerts, events, tools, and insights.

- **Tour:** A nine-part tour leads users through Fuse the first time they launch it. The tour advertises new features and their benefits, and teaches employees how to use them.

- **Responsive:** Fuse is completely responsive, providing mobile access to all the same elements as employees have on desktop. They can thus easily sell to and support their customers from their mobile devices.

- **Consistency:** Since Fuse includes a wide variety of information pulled together from many sites, the team created infrastructure to ensure a consistent look and feel across the platform. A section page template helps ensure that all groups have the same entry point page, and metadata makes everything findable via search. Further, the team created a "Fusifying" tool that helps ensure that a site will have helpful features such as consistent branding and metadata.

## BACKGROUND

Over the past five years, Korn Ferry has been on a steep growth trajectory as the business has moved from pure executive recruitment to professional services. Because this growth has been facilitated through mergers and acquisitions, the company now employs more than 8,000 employees and 2,000 contractors, whereas just five years ago it had just over 3,000 employees. This means that one out of every three current employees came to the business through an acquisition or is completely new.

That kind of rapid growth has had an impact on the types of services the organization can provide through an intranet. Pre-Fuse, there were different user experiences across the legacy intranets, tools, and platforms. This was confusing for the users, who had to use three separate portals on older versions of SharePoint to access different types of information they needed to do their jobs.

Concurrent with the company's rapid growth, the business had been working on a four-year data and systems consolidation project. This project was part of an overarching digital transformation program, and the company needed a platform to provide staff members with the know-how to effectively do their jobs and fully understand the Korn Ferry brand, culture, and relationship

with its clients. Fuse represents this business transformation, a window into "One Korn Ferry," a concept that is executed every day in front of clients as partners and consultants use Fuse to pull up client engagement information in a few seconds—rather than having to consult for days with a variety of teams and systems to find the same information.

## Goals

The new Fuse digital workplace has several primary objectives:

- Bring together Korn Ferry staff and teams under one digital roof

- Provide one platform to effectively communicate, collaborate, and manage knowledge across the entire organization

- Increase efficiencies across key processes and facilitate the dissemination of knowledge across the business

- Ensure consistency in knowledge sharing by connecting the right people with the right knowledge at the right time

- Create clear classifications and content ownership

## Challenges

With Fuse, Korn Ferry aimed to address the challenges inherent in an ever-changing workplace by removing common roadblocks that many organizations encounter and driving toward a frictionless UX. With that in mind, the new platform's development and innovation initially focused on addressing a few key challenges common in most organizations.

- **Initially, the digital workplace aspiration seemed too far out of reach:** Having invested heavily in the underpinnings of Office 365, it was important for Korn Ferry to continue the journey toward the intelligent workspace and to maximize that investment. It was also important to invest in evergreen platform capabilities that stay relevant over time. To achieve that goal, Korn Ferry worked with ClearPeople to help accelerate the development process early on. Leveraging that agency's deep experience with Office 365 ensured that Fuse could evolve along with the Office 365 environment and align with Korn Ferry's business requirements, all while keeping users engaged.

- **Tools and applications such as Microsoft Teams, SharePoint, and Yammer are a challenge for users to juggle and engage with:** Fuse users have access to more than 20 million articles, documents, and pages, and the full range of available tools and apps, through a single point of entry for searching, contributing knowledge, and engaging with communities across the company. The new consolidation brings all of this information together into a common platform that aligns with the One Korn Ferry strategy.

- **The UX was confusing and inconsistent across systems:** One of the challenges in building Fuse was how to provide a consistent UX layer to the Microsoft Office 365

platform. The design team met that challenge by providing a *Launchpad* into applications relevant to the individual user and optimized for desktop, mobile, and tablet devices. Fuse pushes the boundaries of Office 365 with tight integration across the various collaboration tools and even embeds Yammer and Office Graph directly into the UX; users are thus merely a click or swipe away from core apps and critical information at all times.

- **Running a centralized and globally available platform is often a performance challenge:** Korn Ferry is one of the first global organizations to take advantage of the multi-geo location features available in Office 365. In addition to the initial benefits this brings, over time this technology will allow the organization to deliver capabilities to end users based on their home location. And this is critical; Korn Ferry currently has as many employees outside the US as within its borders. Fuse is a cloud-based platform that can be accessed from anywhere. This simplifies login process for geographically dispersed users and allows them to access Fuse from any device. This functionality also helps address data privacy issues, which Korn Ferry's clients are hypersensitive about. Multi-geo location features help cement the One Korn Ferry vision by striving to offer all users a great experience, regardless of geographic location, which in turn breaks down any barriers created by poor connectivity or system performance.

Other challenges that the team encountered include:

- **An Agile approach made the team more agile:** During the planning and implementation phase, the corporate strategy was not fully defined. Using an Agile project approach allowed the team to continue working on the project without hesitation, knowing it could pivot and redirect its efforts as the corporate strategy came into focus over time. Without that approach in place, the team may have encountered more delays.

- **Delays led to additional work:** At the start of the project, the plan was to go live with an MVP, but due to a lag in content migration, corporate leadership asked the team to delay the launch. In the end, the Fuse launch coincided with the company rebrand, which resulted in an additional challenge: the team had to ensure that the legacy company names were removed from all content and accurately reflected the new brand.

- **The team composition shifted as the project progressed:** Key team members from both Korn Ferry and ClearPeople left during a critical phase of the project, which created additional challenges.

# DESIGN REVIEW

## Homepage
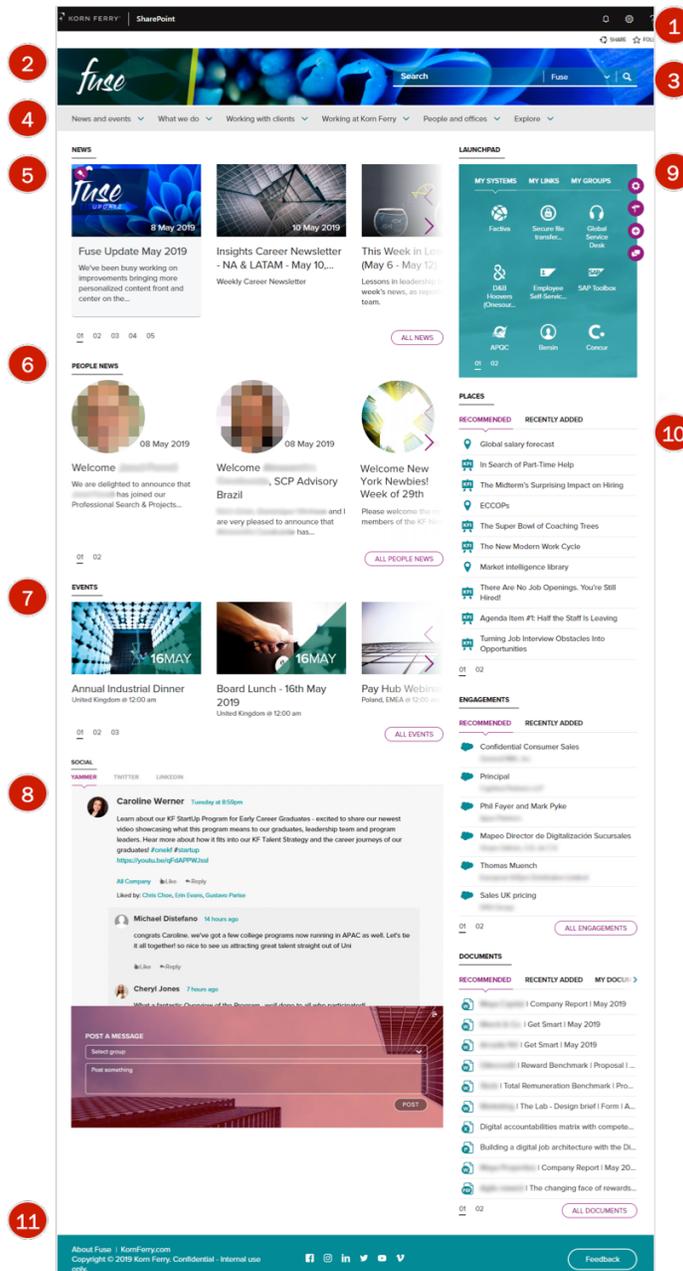


**Image 103. Korn Ferry Homepage.** The Fuse homepage consolidates apps, tools, news, collaboration groups, and more, all in one place.

*KornFerry_01_Homepage_Version1.png*

## Homepage Highlights

The Fuse team's effort to unify all Korn Ferry employees in one digital workplace begins on the Fuse homepage. Understanding the wide variety of tools available to employees resulted in the team creating a *Launchpad* of tools and apps, as well as providing a way for users to find groups with which to collaborate. News, documents, and social capabilities offer further options for employees to learn from one another.

1. **Settings and sharing:** In the far upper right of the homepage and on every other Fuse page, employees can use the standard Office 365 icons to perform tasks such as: view the number of new alerts, change their settings, get help, share the current pages with colleagues, or follow the current page. These icons make it easy for people to achieve common tasks and to assist and connect with colleagues.

2. **Banner:** The top horizontal banner expresses the Fuse brand, and is present on every page. The word *Fuse* acts as a persistent reminder that no matter their origin, all Korn Ferry employees—and tools, for that matter—are joined together in one entity. Given the importance of this company goal, the real estate used for the banner is warranted.

3. **Search:** The site search is always available at the top of pages, making it possible for employees to find what they want, no matter what page they are on.

4. **Global navigation:** Ever-present at the top of pages, navigation menu links are organized by user tasks, employ natural language, and are differentiated from one another. Combined, these elements make the links easy to scan and help users choose the best command. *News and events* makes current information and happenings accessible. *What we do* covers the company's functional areas, so all employees can become familiar with and interact with them. HR and the company mission can also be found under *What we do*. *Working with clients* makes the sales process transparent, from generating new business to delivering a solution. *Working at Korn Ferry* leads to information that everyone in the company needs to know about talent development and management, including pay, benefits and leave, ethics and compliance, privacy and security, onboarding for new hires, and company policies. *People and offices* provides access to the people directory (employee profiles) and office pages, which contain information for the employees based in those offices as well as for colleagues visiting from other offices.

5. **News:** The section heading—*News*—indicates the type of content employees will find there. Stories encompass a wide variety of topics in an effort to increase the chances that all employees will engage. Each news card provides: a related image, a large title, the date in an international format, and a description. Three items are displayed by default, but employees can see more news via either the magenta arrow on the right, the number pagination buttons below, or the *All News Button* in the lower right.

6. **People news:** People like to read about their colleagues, managers, and also about themselves, so one sure way to get employees interested in news is to provide news

about individuals. *Welcome* stories introduce new employees to everyone at the company, which is informative and helps give people an icebreaker for initial communication.

7. **Events:** Each event card displays the event's name, date, time, and location. These cards on the homepage are a great way to advertise events that employees may want to attend (or at least be aware of).

8. **Social:** Interacting with other employees is easy on Fuse. The homepage's *Social* section offers the most recent Yammer posts as well as a field to create new posts. Displaying these on the homepage presents another layer of communication, beyond news. It also suggests to employees that they should stay abreast of what's happening in these channels, and that they should add their own insights to the stream.

9. **Launchpad:** In the upper right, the *Launchpad* combines icons that lead to tools and groups that the logged-in user needs—all in one central, accessible place. The *My Systems tab* displays a user-customized list of applications and third-party business systems to which the company subscribes. *My Links* consolidates links to Fuse pages based on the logged-in user's background, such as location (which can vary greatly given the organization's size), department, and job. *My Groups* provides quick access to the user's key public and private groups in Office 365 Groups, Yammer, and Microsoft Teams.

10. **Right-rail suggestions:** The right-rail sections on the homepage are all about helping users discover and recall helpful content. Each topic—*Places*, *Engagements*, and *Documents*—displays the top *Recommended* and *recently Added*, which let users find items related to their work, as well as all the newest items.

11. **Footer:** A narrow, teal footer provides an *About Fuse* link, icon links to social sites—such as Facebook, Instagram, LinkedIn, and Twitter—and a *Feedback* button so employees can offer suggestions about the page or about Fuse.

## Engagement Explorer



**Image 104**. **Korn Ferry Engagement Explorer.** Users may select facets on the left side of the *Working with clients* page to filter the list by various topics. *KornFerry_02_EngagementExplorer_Version1_cropped-to-size.png*

## Engagement Explorer Highlights

In the past five years, Korn Ferry has undergone many changes, not the least of which is growth. Through mergers and acquisitions, the staff size has increased steeply from about 3,300 full-time employees at the end of April 2013 to more than 10,000 in 2019. Company size was one of two big changes. The other significant change was a change in the company's core business, with a move from pure executive recruitment to professional services.

Successful communication and infrastructure were needed to ensure success with these changes. Fuse provides both. Employees can reference client engagements in moments, rather than having to consult with others and take days to procure the information.

1. **Page title:** The page title, *Working with clients,* confirms to employees where they are on Fuse.

2. **Search:** A special search, in addition to the main Fuse search, is positioned in the page's content area, below the page title. This position indicates that the search is scoped to search only information related to working with clients. Another indicator is the drop-down to the right of the search field, which displays the word *Engagements*.

3. **Filtering:** Each client entry is assigned topics, making them easy to find through search and when using facets on the *Working with clients* page. Employees can find information about any type of client by selecting from the filters on the left, which can be expanded by clicking the plus sign to display all filter options. A wide variety of topics—such as the provided solution, status, market, and value—make finding specific client information a snap.

4. **List:** The filtered list of client results displays key information that employees can use to identify the client, such as the client's name, type of solution Korn Ferry provided, and when the job started. Opening the client entry provides additional information.

## Preferences
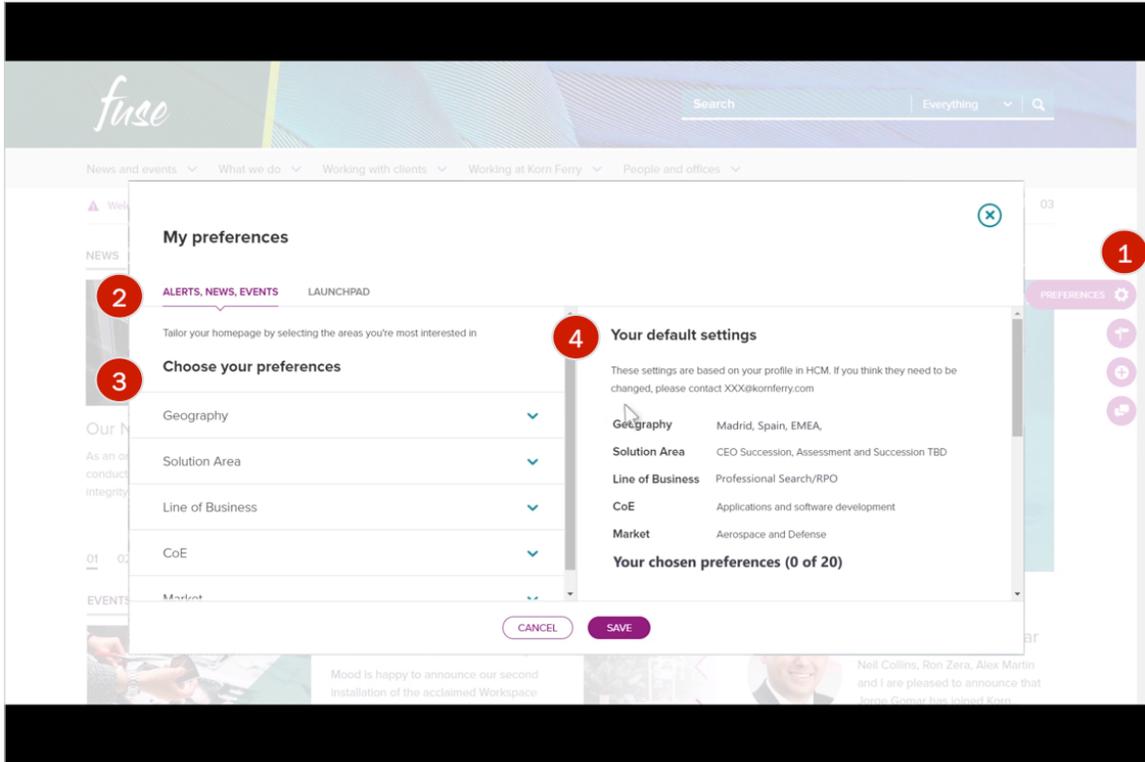


**Image 105. Korn Ferry Preferences.** Users can customize what they see in *News*, *Alerts*, *Events*, and *Launchpad*. *KornFerry_03_PreferenceCentre_Version1.png*

## Preferences Highlights

By choosing their preferences, employees can cull news, alerts, events, tools, and insights to see only items related to their interests.

1. **Access:** The gear icon in the far right opens the *My preferences* dialog.

2. **Areas to customize:** The tabs at the top show that employees can make selections related to their *Alerts, News, Events,* and *Launchpad.* Since the selections related to *Launchpad* are different from the others, those choices appear on a separate tab.

3. **Selections:** The left side displays a scrolling list of topics, such as *Geography* and *Line of Business,* from which users may select.

4. **Defaults:** The user's default choices are listed on the right and clearly labeled. The text at the top explains that the user's settings were selected based on information in the company's Human Capital Management (HCM) system. It's also helpful that the text communicates who to contact if that information needs to be changed.

## Launchpad Customization
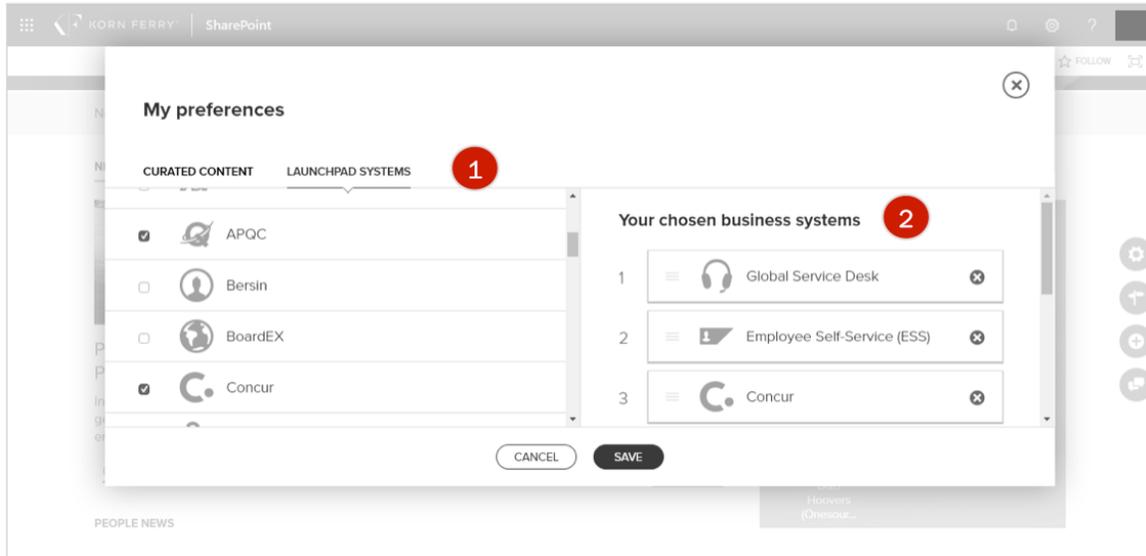


**Image 106. Korn Ferry Launchpad Customization.** Employees can change the default links that appear in their *Launchpad* so they can access exactly what they need. *KornFerry_04_Launchpad_MySystems_01.png*

## Launchpad Customization Highlights

Since *Launchpad* is such a convenient way for employees to access links and tools, it makes sense that employees would be able to customize the list and choose what they want to see.

1. **Select and deselect:** By default, the *My Systems* section of *Launchpad* shows all business systems and third-party business information systems to which the company subscribes. Employees can whittle the list to show only the systems they use.

2. **List of selected:** All business information systems appear in the list on the left. The scrolling list on the right, aptly labeled *Your chosen business systems,* indicates which ones the user has selected. The items in this list appear in the order they were added, but employees can drag and drop items to change their position.

## Group Explorer
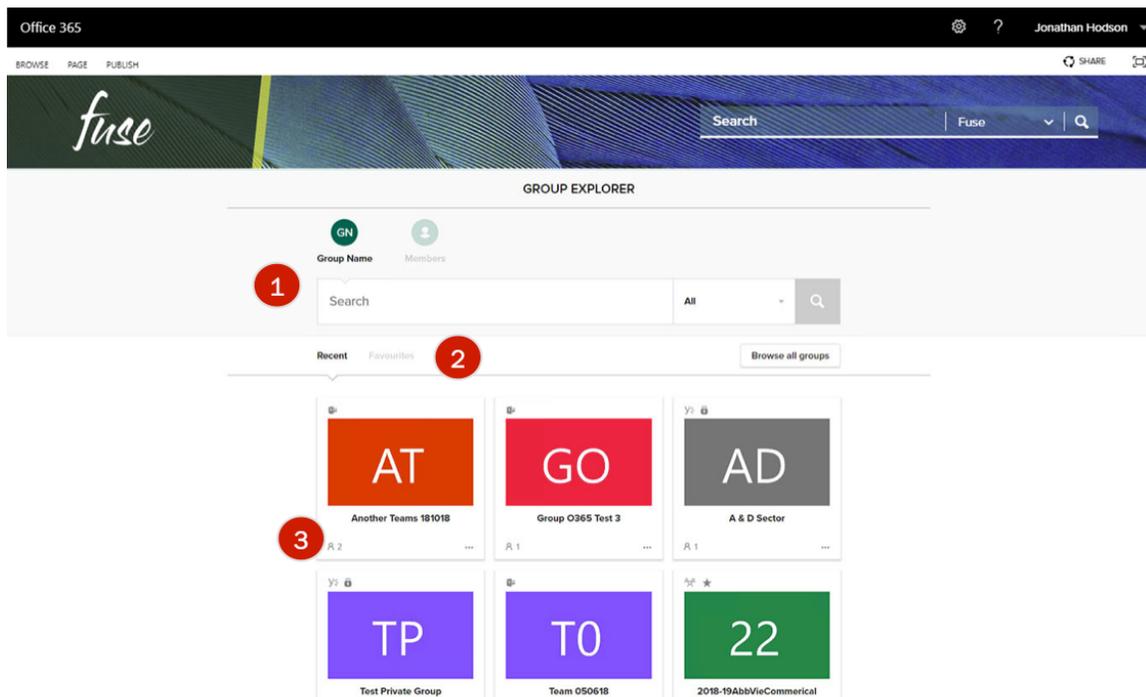


**Image 107. Korn Ferry Group Explorer.** This page offers groups information consolidated in one place, accessible via suggested links, search, and browsing. *KornFerry_05_GroupExplorer_Version1_cropped-to-fit.jpg*

## Group Explorer Highlights

With more than 10,000 Fuse users dispersed around the world, online collaboration is a must. The Group Explorer helps users find collaboration workspaces across Office 365 Groups, Yammer, and Microsoft Teams, and helps them discover groups they may not know about. It also suggests relevant collaboration workspaces based on the activities users are involved in.

The *My Groups* tab in the *Launchpad* on the homepage displays 14 group links and a button leading to the Group Explorer.

1. **Search:** The search field at the top of the page makes it easy to find groups by name and related topics. The position of the search field on the page, combined with the green *Group Name* button above it, signifies that the search is scoped—specific to groups—and is not searching all of Fuse.

2. **Recent and favorites:** The most recently used and favorite groups are consolidated on separate tabs on the page, which makes each set less cluttered and easier to scan. The *Browse all groups* button shows the great set of groups available to employees.

3. **Cards:** Each group is represented with a card that includes the name, its abbreviation, and icons indicating whether it is private or public, the group's source (Office 365 Groups, Yammer, or Microsoft Teams), whether it's one of the user's favorites, the number of members, and more information.

## Contribute Wizard



**Image 108. Korn Ferry Contribute Wizard.** Employees can use the Contribute Wizard to share content such as news and events on Fuse. *KornFerry_06_Contributepage_Version1-cropped-to-size.png*

## Contribute Wizard Highlights

The Contribute Wizard allows users to share different types of content—news, events, market insights, and documents—easily. Since content is taxonomy-driven, the tool allows content to be shared across different sites within Fuse—as soon as it is approved. It's a relatively simple feature that goes a long way toward improving engagement.

1. **Title:** There's a lot of power in a suggestion, and this page title packs a wallop, commanding that employees *Contribute to Fuse*.

2. **Contributions:** Buttons at the top of the page suggest that employees share *News, Events, Market Insights,* and *Documents.* The form on the page below changes depending on the selected content type. The form fields are thus specifically related to the target medium.

3. **Fields:** Employees fill in the form with lots of information, such as title, description, related URL, and images. *Tag the content* appears at the bottom of the form. This is perhaps the most important form section as it relates to taxonomy and includes the metadata. This section requests that users provide information about the corporate group related to the entry, along with industry and topic tags. This information helps make the information findable in search, as well as in areas where Fuse suggests related items to employees.

## Tour: Contribute
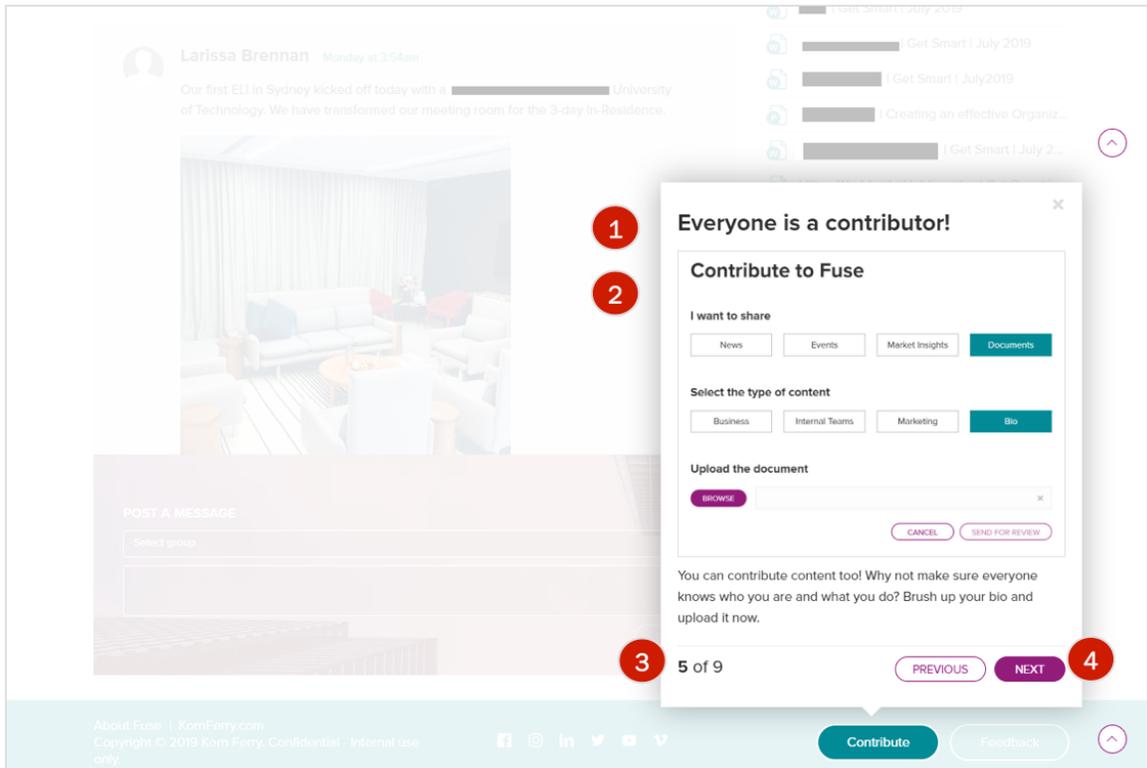


**Image 109. Korn Ferry Fuse Tour (Step 5 of 9).** Upon users' first visit to Fuse they are presented with a series of nine lightboxes, each describing a specific platform feature. The box shown here is step 5, which introduces users to ways that they can contribute to the platform, and encourages them to do so—letting them know that *Everyone is a Contributor! KornFerry_07_FuseTour_05.png*

## Tour: Contribute Highlights

Change can be difficult for users, even if that change is an exceptional new intranet at the center of the digital workplace. To help employees ease into the new design, they are presented with a tour the first time they access Fuse. Nine different cards point out key features in the design, such as: how to use the preferences gear in the upper right to customize news, how to contribute to Fuse, how to access their most recent documents, how to give Fuse feedback, and how to use search.

1. **Title:** An upbeat title—here, *Everyone is a contributor!*—gives energy to the tour and sets users' expectations about the new design.

2. **Screenshot:** The screenshot of the interface is cropped to show only information that's relevant to the topic being advertised.

3. **Progress:** Users are generally more likely to stick with a stepped UI, such as a tour or a wizard, if they know which step they are on and how many steps they have to go. The number status—here, "5 of 9"—communicates where users are in the tour. This helps set expectations and makes them feel in control, which helps to make a great first impression.

4. **Navigation:** The *Next* button is obvious and visually strong, keeping employees moving ahead in the tour. The *Previous* button is there for folks who want to recheck something they already saw.

## Consistency and Section Pages
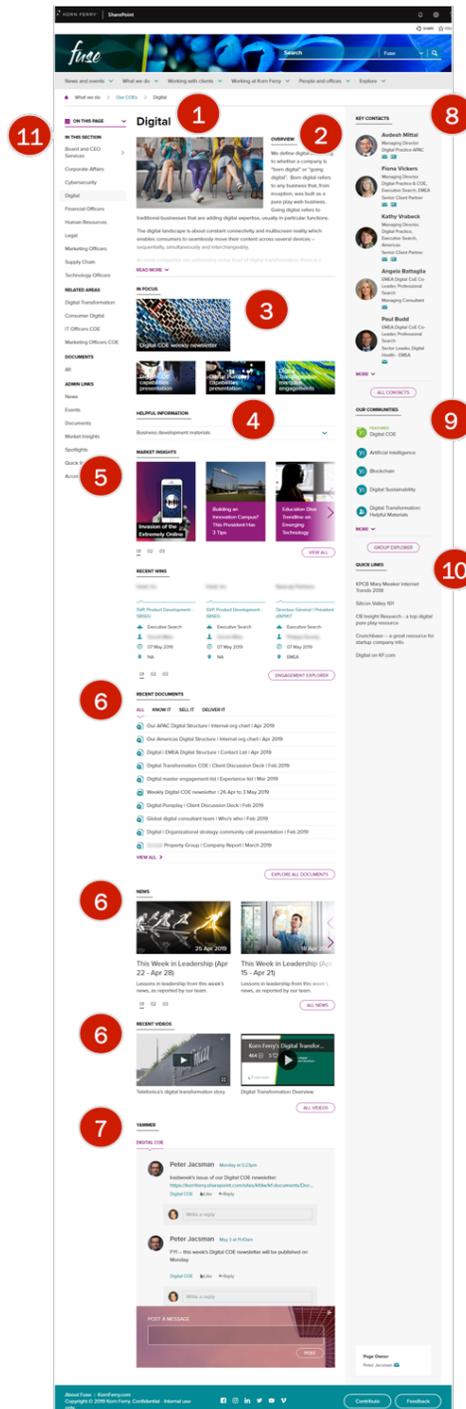


**Image 110. Korn Ferry Content Page.** A template for each group's section page provides a consistent look and feel for all groups. The content sections include links, contacts, and related areas. The *Digital* team section describes its mission: "*We define digital according to whether the company is 'born digital' or 'going digital.'* Born digital *refers to any business that, from inception, was*

*built as a pure play web business.* Going digital *refers to traditional businesses that are adding digital expertise, usually in particular functions. The digital landscape is about constant connectivity and multiscreen reality, which enables consumers to seamlessly move their content across several devices—sequentially, simultaneously, and interchangeably." KornFerry_08_Contentpage_Version1.png*

## Consistency and Section Pages Highlights

The site uses consistent branding and consistent text for page titles and subheadings, buttons, and links. Sections within pages are separated with subheadings, space, or background color.

The main page for each functional area's section is what the team refers to as a *storefront page*. These areas are well organized and each follows the same template. This consistency helps designers spend less time organizing pages and helps users spend less time acclimating to them.

The main content area in the page template's center section suggests content types to include on the page. Each functional group can insert its own content in these topic areas.

1. **Page title:** The page title is large and appears at the top of the page, helping users confirm where they are.

2. **Overview:** The *Overview* area at the top of the page provides section information, such as information about the team and what it does. It may include a mission or philosophy. Clicking *Read more* expands the overview to display the entire *Overview* section.

3. **Links:** *In Focus* includes important links, selected by the page owner, as hyperlinked images with tiles. These links may include internal presentations or other collateral.

4. **FAQ:** The *Helpful Information* (accordion) includes horizontally stacked pull-down tabs that can house content such as text, links, tables, video, and action buttons. This section typically includes content specific to the page that would otherwise be provided in a document. With the accordion, employees can immediately get the information without needing to maneuver a PDF.

5. **Market information:** The *Market insights* section includes articles from the Korn Ferry Institute thought leadership feed as well as links to external articles.

6. **Recent items:** The next few sections display the most recent information in documents, news, and videos. The most recent sales wins (*Recent Wins*) section summarizes the more detailed information that can be found when a user clicks on *Engagement Explorer* (which leads to the *Working with clients* page). This summary provides a quick overview of work recently sold.

7. **Yammer:** If a Yammer group shows as *Featured* in the *Our Communities* section in the right rail, then the feed from the Yammer group appears in the Yammer web part at the bottom of the page.

8. **Group contacts:** The right rail contains *Key Contacts*, with each person's name, photo, tile, group, and email link. *More* displays a longer list of contacts, while the *All Contacts* button shows all contacts in that group. This helps employees find the right person for their needs, and can increase collaboration both within and between groups.

9. **Communities:** *Our Communities* lists each community relevant to the group, along with an icon indicating whether it's a workspace in Office 365 Groups, Yammer, Microsoft Teams, or SharePoint. Likewise, to create a more enfranchised platform, the team created

a tool that allows a modern SharePoint site to be "Fusified." This ensures that pages adhere to standards such as consistent branding and metadata. Content from the site is surfaced in Fuse. Content from Fusified communities displays in Fuse for users who have access to them.

10. **Links:** *Quick Links,* at the bottom of the right rail, typically includes external websites that are used frequently by employees working within the functional area. This section exposes external resources that users might not otherwise know about and makes them readily accessible. The page owner decides which links to include. While there are also links in the *Launchpad*, it appears only on the homepage, while these *Quick Links* given teams easy access to links on their section page.

11. **Navigation:** Some section pages can become rich with content, so the team added the *On This Page* section in the left-side navigation. This section basically offers anchor links that jump to various page sections. Other navigational elements on the left include*: In This Section, Related Areas, Documents,* and *Admin Links* (which are visible only to the page owner).

# Mobile Section Page
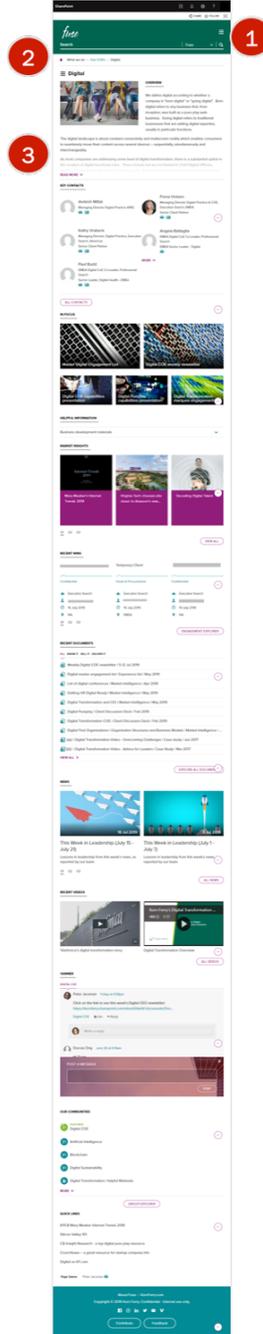


**Image 111. Korn Ferry Section Page (Mobile View).** Items are presented in order of importance on mobile devices. *KornFerry_09_Mobile_Storefront_01.png*

## Mobile Section Page Highlights

Korn Ferry's consultants and project managers work with clients in many locations to fulfill and support their talent needs. The Fuse team's discovery research with these and other employees revealed that they needed access on their mobile devices. The team responded by making Fuse responsive. All features on desktop are also available on mobile and are formatted accordingly.

1. **Navigation:** The global navigation, search, and other important elements—such as alerts, settings, and sharing and following of pages—all appear toward the top of the screen. UI elements change to accommodate touchscreen and the small viewport; for example, the global navigation collapses under a hamburger icon.

2. **Breadcrumb:** The breadcrumb navigation is helpful on desktop and mobile, so employees can navigate up a step or two in the information site hierarchy quickly, without needing to consult the global navigation.

3. **Priority:** The page elements don't reorder by dropping columns. Instead, the team chose content it felt was most important and displayed it in order of importance on mobile. For example, the *Overview* section is first, then comes *Key Contacts*—which is at the top of the right rail on desktop.

## Search Front End
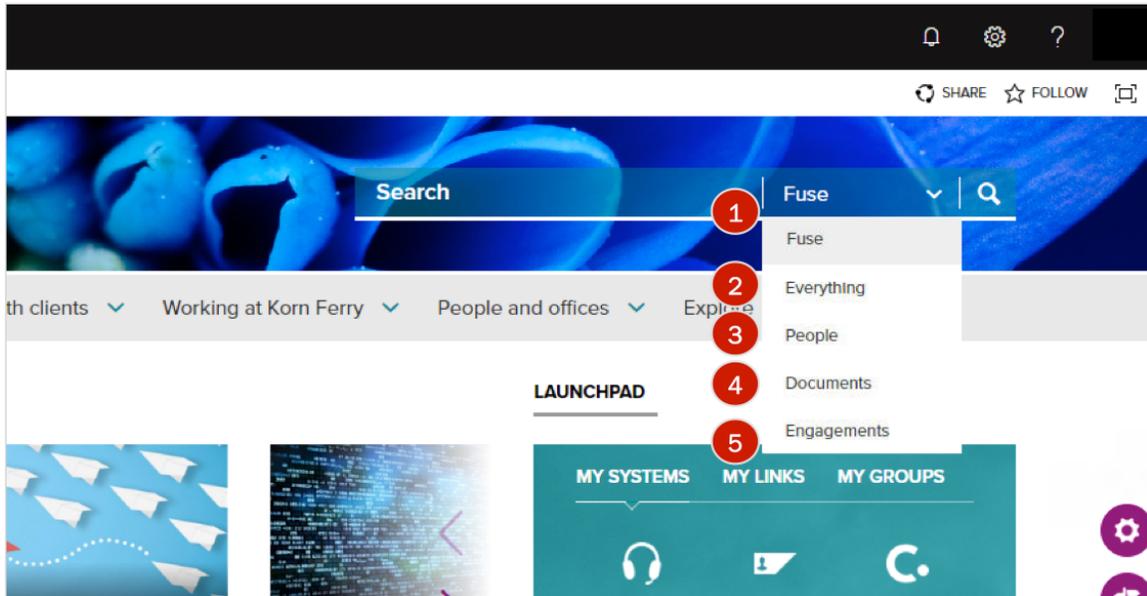


**Image 112. Korn Ferry Search Scope.** The site search defaults to search the entire site, but can be scoped to search more or less.

*KornFerry_10_SearchScope_01.png*

## Search Front End Highlights

Searches on Fuse can cast a very broad or very narrow net to assist employees is finding exactly what they want.

Search results are divided in three sections: 1) people, 2) engagements, and 3) content (documents, pages, and list items). Filters let users narrow the results based on the taxonomy and how the content is tagged, and the filters are hierarchical. So, for example, expanding the *Geography* filter shows a hierarchy by region, country, and office.

On the front end, employees can search Fuse and its communities or choose from items in the drop-down list.

1.  **Fuse:** All content on Fuse and in Fusified communities is the default search selection and probably the most expected user choice.

2.  **Everything:** Everything in Office 365, Salesforce, SAP and legacy intranets, iAcademy, and Korn Ferry Institute thought leadership.

3.  **People:** Office 365 (Delve) profiles.

4.  **Documents:** All documents on Fuse and in Fusified communities.

5.  **Engagements:** Salesforce and SAP.

## Promotion
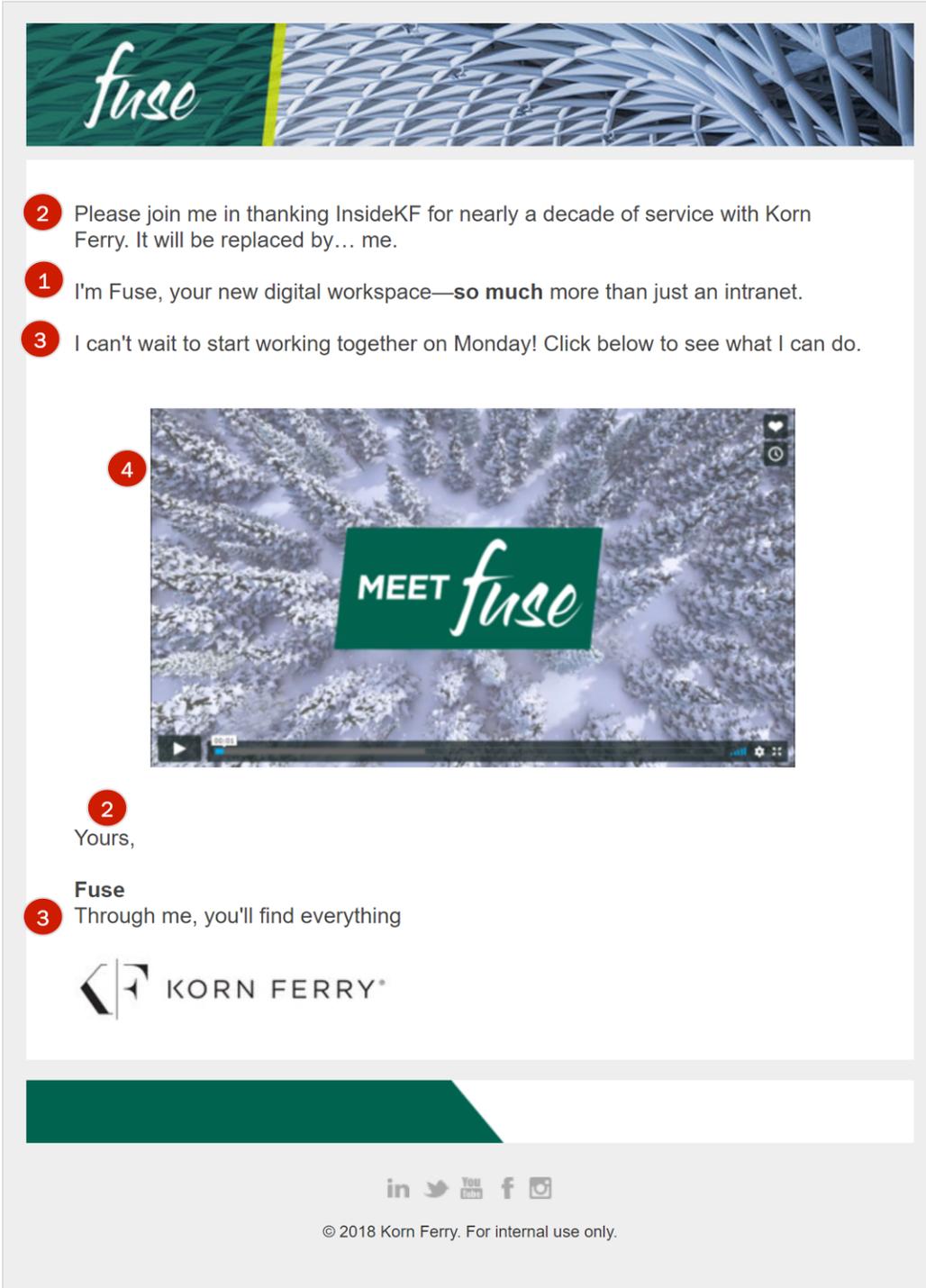


Image 113. Korn Ferry Promotion. One of the emails promoting Fuse includes a video and has a friendly tone of voice.
*KornFerry_11_PromotionInsideKF_Version1.png*

## Promotion Highlights

Most teams do their promotional activities during the launch phase, but the Fuse project team started promoting the new platform way back during the research phase, when the team was engaging with users. Promotional activities continue to this day. That's the best way to do promotion: set the stage early so that people begin to get excited about what to expect and let the momentum build on itself. The team incorporated many education and advertising activities into their overall project:

- Site tours during the launch

- Videos explaining Fuse and its benefits

- Stickers

- Timing the launch to coincide with the Korn Ferry rebrand, so Fuse demonstrated value by providing access to assets that helped represent the One Korn Ferry brand

- Identifying and training super users and page owners

- Live demos during road shows in offices around the globe

- Appointing office gurus as points of contact in the offices

- Agreements and plans to ensure all internal communications go through Fuse

- Email newsletters

Emails like the one shown above were sent out to the entire organization and give a sense of the types of promotions the team employed.

1. **Fuse as human:** The email is written in the first person from Fuse's point of view, personifying the intranet.

2. **Tone:** The team chose this path to make Fuse seem inviting and to embody a tone similar to the Korn Ferry brand: friendly and approachable.

3. **Journey:** The team also wanted employees to feel that the platform was on the transformational journey with them. Phrases like *I can't wait to start working with you* and *you'll find everything* promise this positive voyage together.

4. **Video:** An embedded video introduces the elements of Fuse and its benefits.

# DESIGN PROCESS AND USABILITY WORK

## Approach

Korn Ferry's design approach is to combine usability and accessibility best practices with intuitive IA and user-centered design. The end goal is to create a UX that is simple and effective, and becomes second nature to its users. This was achieved on the Fuse project through a series of research and design exercises that included users as the team's design partners.

## Planning Phase Activities

During the planning phase, team members conducted several exercises to help them understand the users' requirements and priorities, including:

- **Five discovery workshops** with 33 participants
- **37 interviews**
- **A company-wide survey** that yielded 1,604 responses
- **An intranet name poll** (conducted through Yammer) that resulted in 269 votes
- **A Treejack survey** to establish the IA structure that yielded 50 responses. Invitations to participate were sent to people who had responded to the company-wide survey and indicated that they wanted to be involved.

## Determining Site Organization

Based on experience gained from past intranet implementations, the team decided against structuring the platform solely on the organizational structure. Instead, it structured Fuse around three main areas:

- *What we do*: Structured around the company's functional areas.
- *Working with clients*: Follows the sales process from generating new business to delivering work.
- *Working at Korn Ferry*: A task-based structure.

| Working with Outside Agencies | |
|---|---|
| Agency | Project Role |
| ClearPeople | • Designed the UX<br>• Developed and implemented features<br>• Provided project management |
| Ogilvy | • Designed the Fuse corporate identity and launch materials |
| BA Insight | • Provided connectors for SharePoint search<br>• Provided expertise in how to bring data from SAP and SF into the search index |

## Adoption/Buy-in

As with all digital transformation initiatives, it's important to have buy-in from the senior leadership team and for the entire organization to understand why change is happening. It's not something that should be led by IT. This wasn't a problem for Korn Ferry, as the business itself was demanding that the One Korn Ferry approach be met. It was therefore imperative that the intranet initiative be filtered through all teams and departments.

With this goal in mind, during the planning phase the team engaged with users through discovery workshops, one-on-one interviews, company-wide surveys, and a naming poll. Then, when the timing of the Fuse launch coincided with the company's rebranding campaign, Fuse provided access to assets to support that initiative. By hosting key business processes at such a pivotal moment of transition, Fuse's place as a source of optimization for the organization was solidified.

Other keys to adoption during launch were the super users and page owners that the team had identified and trained to maintain content through live demos during road shows in offices around the globe. Office gurus were also appointed as points of contact in many Korn Ferry offices.

Ultimately, what solidified Fuse's place at the center of the Korn Ferry culture was the fact that all internal communications now go through Fuse.
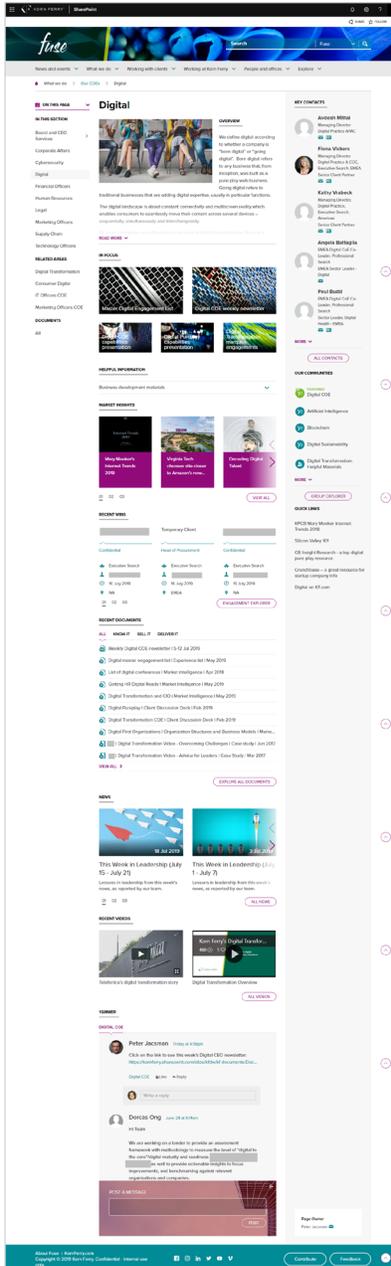
**Image 114. Korn Ferry Storefront Pages.** Storefront pages are landing pages for functional areas and they all follow the same page template. The center section includes: *Overview*, *In Focus* (spotlights), FAQs (accordion), *Market Insights*, *Recent Wins*, *Recent Documents*, *News*, and *Videos*. The right rail contains: *Key Contacts*, *Our Communities*, *Quick Links*, and *Page Owner*. The left rail includes navigation elements: *On This Page*, *In This Section*, *Related Areas*, all *Documents*, and *Admin* links (only visible to the page owner). The Yammer feed is on the bottom. *KornFerry_12_Storefront_01.png*
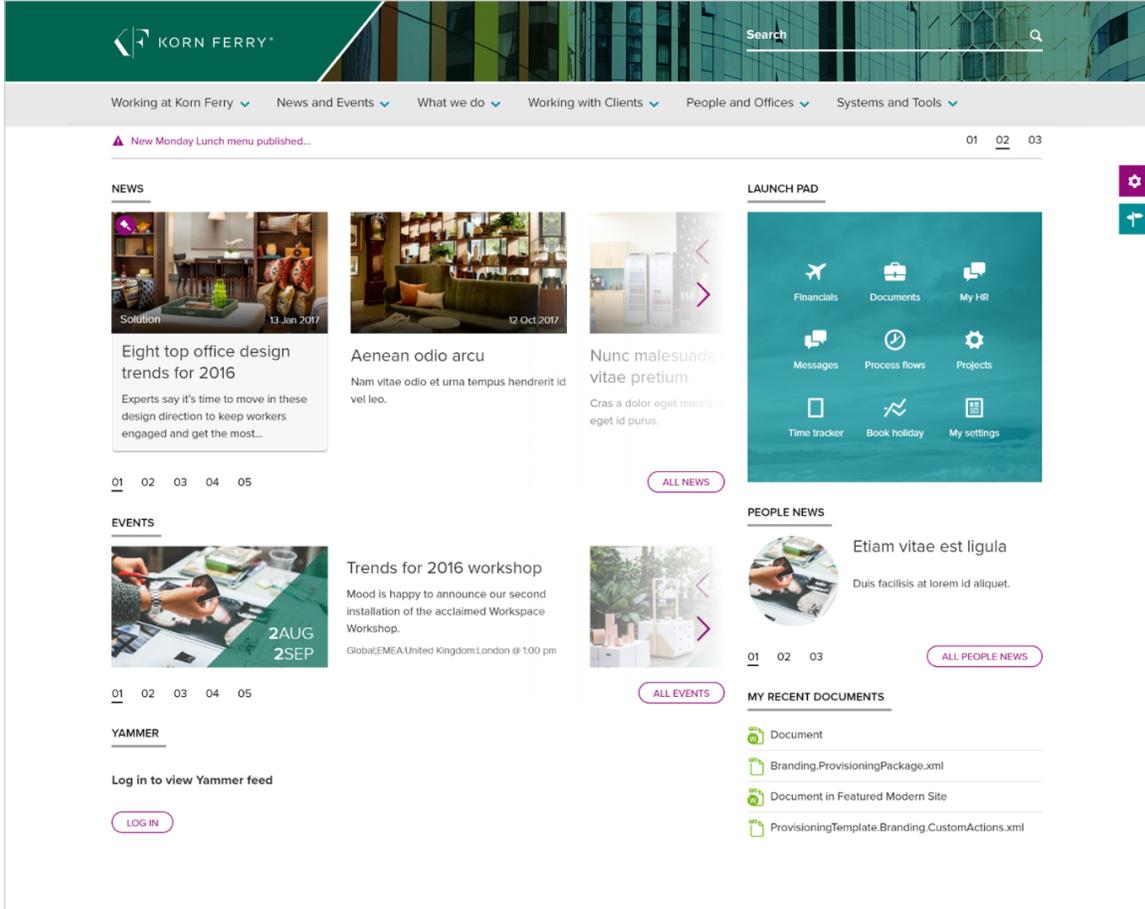
**Image 115. Korn Ferry Early Homepage Design.** This image shows the first design of the Fuse homepage in June 2017, about a year prior to launch.
*KornFerry_13_FirstHomepageDesign_01.png*
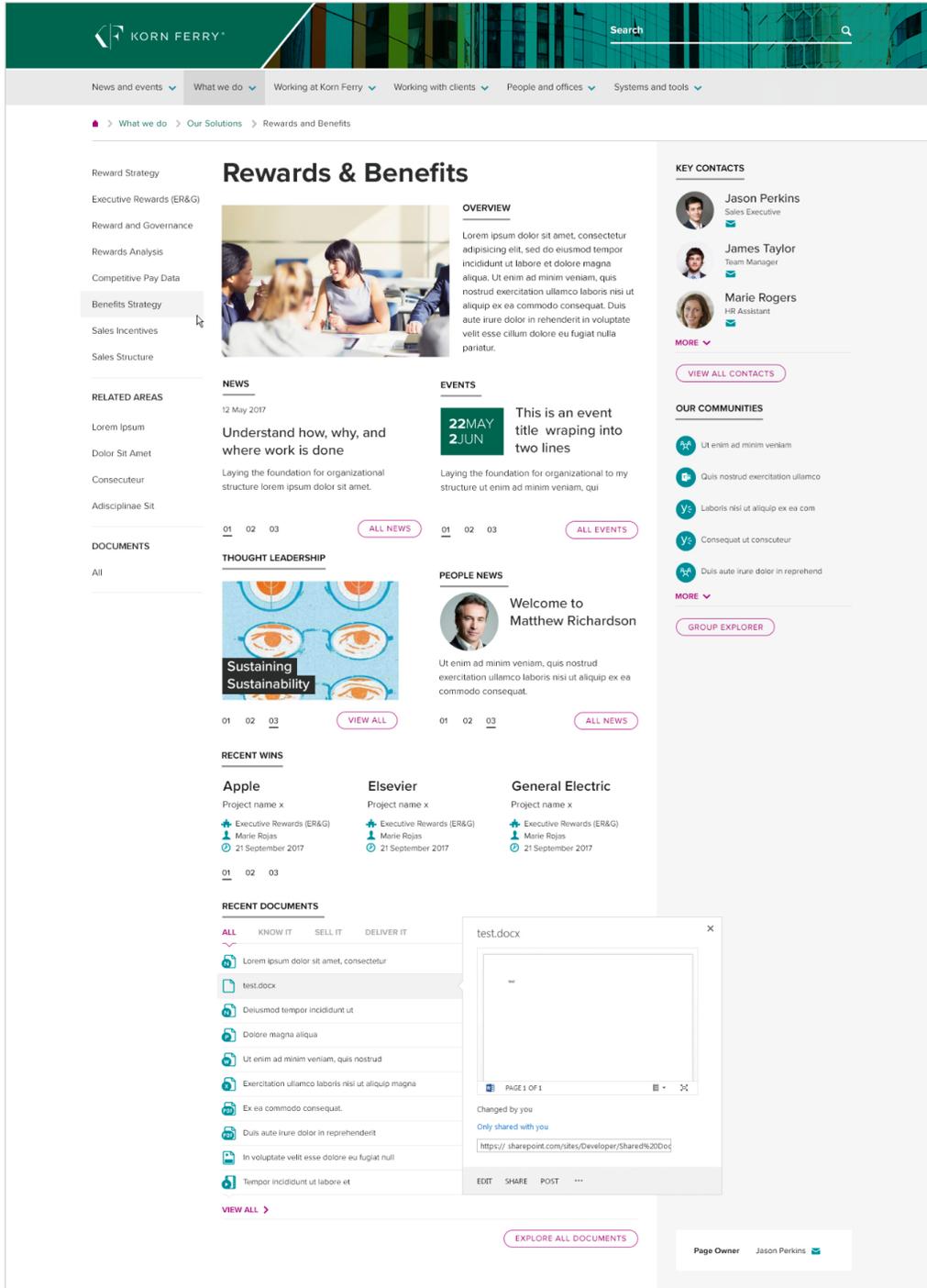
**Image 116. Korn Ferry Early Content Page Design.** This image shows an early design for a content page on Fuse, about a year prior to the launch.
*KornFerry_14_FirstContentPageDesign_01.png*

# GOVERNANCE

## Ownership

Fuse is managed by the Collective Intelligence Task Force, a newly established team under the mandate of a steering committee consisting of executives from across the business. The team's mission is to help Korn Ferry work smarter, more strategically, and more successfully together by combining and connecting the company's vast and deep intelligence and data.

The task force designs and executes strategic goals and initiatives to foster coordination and integration of new features and content covering all of Korn Ferry's lines of business.

| Intranet Team Responsibilities | |
|---|---|
| Role | Responsibilities |
| Steering Committee | • Define and oversee corporate strategy<br>• Serve as sounding board |
| Collective Intelligence Task Force | • Design and execute strategic goals and initiatives to foster coordination and integration of new features and content covering all lines of business in Korn Ferry<br>• Develop new features and improvements based on feedback from users<br>• Train super users and page owners<br>• Drive user adoption through training, roadshows, lunch & learns, and demos |
| Super Users and Page Owners | • Develop and manage content on their designated pages<br>• Contribute to news and events pages |
| All Staff | • Manage their own bios; ensure bio is on brand and upload to Fuse<br>• Contribute documents |

## URL AND ACCESS

| Access Information | |
|---|---|
| Item | Status |
| URL | https://kornferry.sharepoint.com/sites/kfdw<br><br>Vanity URL: https://kornferry.com/fuse/ |
| Default Status | Fuse is set as the default homepage in Internet Explorer and Chrome. Users cannot change this default. |
| Remote Access | Remote access is built into SharePoint Online through Office 365. |

## TIMELINE

| Project Milestones | |
|---|---|
| Milestone Date | Milestone Description |
| December 2016 | Collective Intelligence Task Force established |
| January–June 2017 | Internal planning: budgeting and evaluating external partners |
| January 2017–June 2018 | Content review of legacy intranets |
| July 2017–June 2018 | Design and develop new intranet |
| November 2017–June 2018 | Content migration from legacy intranets and upload of new content |
| June 25, 2018 | Fuse launch |
| July 2018–present | Ongoing development of the intranet |
| **Overall redesign timeframe:** 19 months | |

## CONTENT MANAGEMENT AND CONTENT CONTRIBUTORS

Fuse is a democratic platform where everyone can contribute. It provides easy content administration, including the ability to quickly tag content to ensure it displays in the preferred platform areas. Content management is handled as follows:

- **Contributors:** Approximately 200 super users ensure that contributed content and tagging meet quality standards. Super users are appointed users representing their functional area, which can be a department, team, office, or practice. The community of

super users on Yammer is an active group.

- **Maintaining quality:** The Collective Intelligence Task Force oversees all of this. The task force moderates the super user community on Yammer, provides training for new super users, and provides ongoing support for all super users.

- **Training:** Examples of training activities include: induction calls/meetings, weekly drop-in calls, and a SharePoint site with training materials. The training materials include recordings of training calls, GIFs showing how to execute certain actions, and overview placemats.

## TECHNOLOGY

Fuse was developed using Office 365 SharePoint Online. This choice aligns with Korn Ferry's global cloud strategy and is designed to take advantage of Microsoft's evolving roadmap.

Prior to Fuse, all existing intranets were based on SharePoint 2010, Windows Server 2008, and SQL Server 2008. All of these were approaching end of life.

| Technology | |
|---|---|
| Category | Technology Used |
| Web Server Hardware and Operating System | Office 365 Tenant (hosted by Microsoft) |
| Bug Tracking/Quality Assurance | Microsoft Forms, SharePoint Tasks, Countersoft Gemini Tracker |
| Design Tools | InVision |
| Site Building Tools | Dot.net, Azure functions, PowerShell, SharePoint CSOM and PnP, Graph API |
| Search | SharePoint 365, SharePoint 2016 Hybrid, BA Insight Connectors |
| Other Functions | Custom functions and web applications, such as a user profile custom property sync across multi-geo locations and Graph API |

## MOBILE

Based on the feedback gathered during the discovery and planning phases, it was clear that it was important for Fuse to be fully accessible, regardless of device. Currently, all content is available to all users from any device, but the responsive design has not yet been optimized for specific devices or specific audiences.

## SEARCH

### Search Based on Tagging

Fuse is a search-driven platform where search functionality enables Korn Ferry teams to run search results across the entire ecosystem (Office 365, SAP, Salesforce, etc.). Everything can be searched from one place, but because offering numerous results can overwhelm users, the site provides filtering based on taxonomy (tags) to help narrow the search results. The source of the results is displayed and can also be used as an additional search filter. The URL of the location is also displayed in the search results.

### Search Technology

Out-of-the-box SharePoint 365 search is the core technology and search index for Fuse. Korn Ferry also has SharePoint 2016 Search Hybrid to get on-premise content into the index. BA Insight Connectors are used to get data from Salesforce and SAP into the index, and all content (Fuse, Salesforce, SAP) is mapped and tagged to the same taxonomy and managed properties to facilitate slicing and dicing.

### How Search Works

1. The user can select a search scope from the five search drop-down choices:

   - **Fuse:** Searches all content on Fuse and Fusified communities
   - **Everything:** Searches everything in Office 365, Salesforce, SAP, legacy intranets, iAcademy, and Korn Ferry Institute thought leadership
   - **People:** Searches Delve profiles
   - **Documents:** Searches documents on Fuse and in Fusified communities
   - **Engagements:** Searches Salesforce and SAP

2. When the user selects the Fuse search scope, the results are presented in three blocks:

   - People
   - Engagements
   - Content (documents, pages, and list items)

3. The filters (on the left) are used to narrow results and are based on the taxonomy and how the content is tagged. The filters are hierarchical. For example, expanding the *Geography* filter shows a hierarchy of region, country, and office.
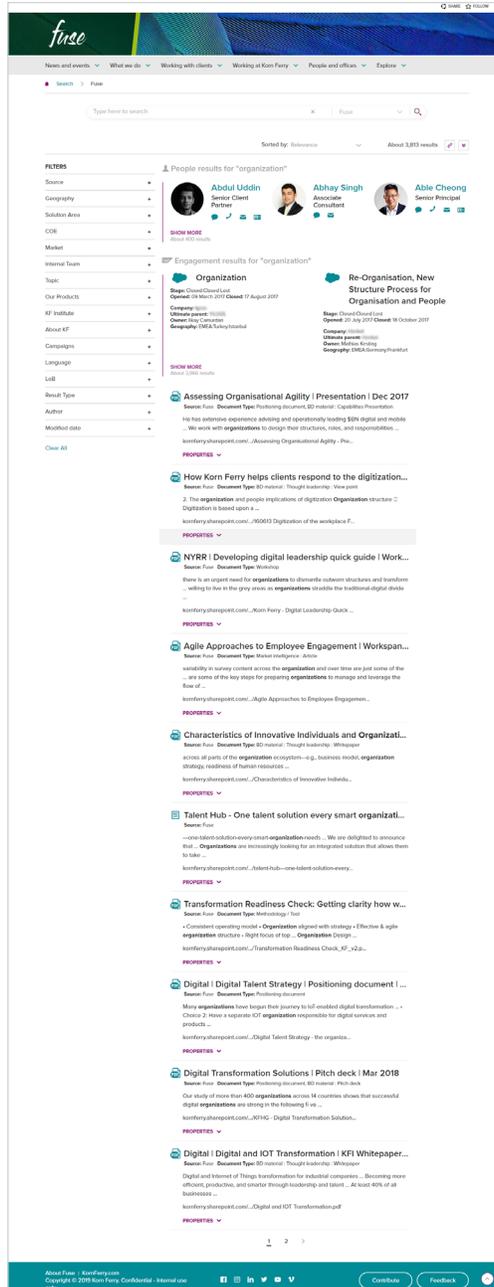
**Image 117. Korn Ferry Search Results Filtering.** Once the user selects the search scope, the results are presented in three blocks: people, engagements, and content (which includes documents, pages, and list items). The filters on the left, used to narrow the results, are based on the taxonomy and how the content is tagged; they are also hierarchical. For example, expanding the *Geography* filter shows a hierarchy by region, country, and office.
*KornFerry_15_Searchpage_Version1.png*

## ROI

The ROI for intranets is notoriously difficult to measure and something that Korn Ferry struggles with. Key metrics for success are based on broader organizational benefits such as improved communication, collaboration, and knowledge sharing; increased productivity; and higher staff retention—all of which foster a better sense of community and engagement. These are often intangible factors, but Korn Ferry is experimenting with enhanced analytics packages (TyGraph) to help provide the business with more concrete evidence of Fuse's success.

## LESSONS LEARNED

User adoption is integral to success, and Korn Ferry understands that fact firsthand. When team members describe the overarching lessons they learned through the Fuse project, they simply say: **Perseverance, creativity, and listening to the needs of your workforce are key.**

Once staff members see the benefits for themselves, adoption is easily sustained. It's therefore important to think through the adoption and training approach well before launch. The Korn Ferry team did this through in-person road shows—conducted early and often—and by meeting users face to face.

# Loblaw Companies Limited

## COMPANY

Loblaw Companies Limited is Canada's largest retailer, providing grocery, pharmacy, health and beauty, apparel, general merchandise, financial services, and wireless mobile products and services.

**Headquarters:** Brampton, Ontario, Canada

**Company locations:** The 2,500 stores across Canada are located within 10 minutes of 90% of Canadians.

**Locations where people use the intranet:** The intranet is currently used in all office locations and the company's 1,200 grocery stores, 1,700+ pharmacies, and 19 distribution centers.

**Annual revenue:** Approximately $46.69 billion CAD in 2018

## THE INTRANET

**Users:** flip was designed as the starting point for Loblaw's approximately 200,000 colleagues (those employed by Loblaw) and employees (those employed by a franchisee) across Canada. The platform offers a personalized experience, serving up the most important and relevant content and tools based on each user's division and role.

**User roles:**

**Frontline:** Nonmanagement store colleagues, such as cashiers and clerks.

**Store Management:** Store managers, assistant store managers, department managers, and store administration (bookkeepers).

**Store Support:** Colleagues in office roles that support stores; these colleagues are predominantly in shared service functions such as finance, IT, and marketing.

**Store Operations:** Regional vice presidents, district managers, and specialists responsible for a grouping of stores.

**Merchandising:** Colleagues who own the relationship with Loblaw vendors providing goods for resale in the stores. These colleagues make decisions about the products carried and ensure they are set up appropriately in Loblaw systems.

**Office:** A persona similar to the store support role, but without the need for visibility to communicate with other Loblaw stores.

**Mobile approach:** Responsive web design

**Technology platform:** SharePoint hosted on Office 365 and integrated with a custom Microsoft .NET development solution hosted within Azure

## LOBLAW TEAM

**Design team:** A team of approximately seven people designed the front end, including IA, UX and visual design. A software development team, consisting of eight developers located onshore did the back-end development and architecture. Business partners in Central Operations provided additional assistance with scheduling functionality.

**Core flip team:** Richard Windross, Senior Director, Corporate Affairs & Communication; Jennifer Ballantyne, Senior Manager, Content and Community; Julia Simmons, Senior Manager, Internal Communication; Suchita Jain, Program Manager

This team works collaboratively with other business functions, including Central Operations and HR.

## RIGHTPOINT TEAM

**Project management:** Jason Abrams, PM Director; Brad Kramer, PM Associate Director; Naveed Lakhani, PM Associate Director

**UX and design/creative services:** Tim Stahl, VP Strategy & Design; Aja Shamblee, Senior Art Director; Sarah Wallace, Associate Experience Director; Mark Drespling, Associate Experience Director; Kelly Noah, Associate Experience Director; Kareem Hindi, Senior UX Designer; Chris Niemyjski, Associate Content Director

**Development:** Jason Prell, Senior Solutions Architect; Jason Sears, Solutions Architect; Mike McDermott, Solutions Architect; Andrew Varnon, Lead Developer; Brennan Cage, Lead Developer; Liz Sdregas, Senior UI Developer; Bryan Gulley, Senior UI Developer; James Mburu, Senior BI Architect; Paul Mathai, QA Senior Analyst

Service Desk and Support: Sherrie Eichstaedt, Service Delivery Associate Director; Alex Swarthout, Associate Support Technician; Leo Perenzuela, Associate Support Technician

## INTRANET TEAM



**Team members shown here** *(top row, left to right): Tim Stahl, Jennifer Ballantyne, Jason Prell, Aja Shamblee, and Andrew Varnon; (bottom row, left to right): Suchita Jain, Jason Abrams, Richard Windross, Julia Simmons, and Jason Sears.*

# HIGHLIGHTS ABOUT THIS WINNER

In retail, customer experience (CX) and UX have long been an obvious pairing. The Loblaw Companies Limited intranet, flip, provides product and service support with its highly personalized design. All employees—whether they are executives working on corporate strategy or customer-facing associates working a cash register in a supermarket—can find resources and trustworthy information on flip. Store-related announcements, shift hours, schedule, and product recall notices for pharmacies and stores are just some of the flip features that keep employees informed, productive, and running the retail stores meticulously.

- **Time-sensitive, accurate product information:** In-store employees use flip to stay abreast of information about the products they sell. The intranet is the de facto source that employees can trust for everything from supply information to product recalls.

- **Cultivating the customer experience:** Helping customer-facing employees create a positive customer experience is a mainstay of flip. Several features, such as *Next Shift* and *My Schedule,* help employees who interact directly with customers at pharmacies and retail stores. A Yammer feed also enables employees to discuss, in the open, any idea or issue.

- **Responsive:** A goal of the design team was to provide this mobile-first experience so that employees have the information they need, wherever they are, and at any time. This enables them to act on information immediately, and have a positive impact on customers and the business around the clock.

- **Roles based on personas:** The design team researched Loblaw employees, created personas, and used those personas effectively by basing the intranet's user roles on them. This resulted in a highly personalized experience for flip users.

- **Personalized homepage hub:** Depending on the user's division, the homepage, banner, logo, apps toolbar, and navigation all change. Content is also targeted by job role, division, and sometimes by store. These efforts tailor the flip homepage experience to the individual.

- **Flexible, simple design patterns:** Sets of well-designed cards, tiles, and banners can be switched in and out to make personalized homepages, providing the appropriate targeted content for the user.

- **Communication:** The *Message Centre* makes it easy for employees to effectively share critical and noncritical information about products and processes with employees who need it. The *Message Centre* is pushed to in-store and other employees as a replacement for static email messages. Messages are up to date and trusted, enabling employees to act in a timely and appropriate manner.

# BACKGROUND

Before flip launched, the organization had several separate intranets; the two largest were Loblaw Inside and Front Page. Loblaw Inside supported approximately 10,000 users and was difficult to search. Front Page had more than 600 content providers contributing to 24 unique subsites—one for each of the company's grocery banners (a grouping of stores under the same name and/or region)—and did not have search capabilities. Neither intranet had the ability to target content to groups of users, and both sites were built on Microsoft SharePoint 2007, which was reaching end-of-life support. The company had also recently completed its acquisition of Shoppers Drug Mart, which had an intranet built on the Google platform.

It was time for a new intranet.

## Goals

The company had three high-level goals for this new intranet:

- Provide relevant content to colleagues in an accessible and mobile-friendly manner.
- Expand the intranet's reach beyond existing users to include more than 140,000 frontline colleagues, who previously had no access to intranet content.
- Build a sense of community among all colleagues, regardless of location or role.

## Challenges

The team faced several key challenges during the project:

- **Complex requirements for targeting and securing content:** At launch, the organization had three distinct hiring companies (with unique HR programs and policies), six operating divisions, and 25 store banners.

  To deliver the best experience for users, the team needed to be able to target content by division, banner, and job roles, and, in some cases, by specific stores. Further, legal requirements meant that some company areas could not see another area's content.

  The team uses a matrix to outline the organization's operating divisions, while personas created for flip show how content is targeted and which features are available for each persona.

- **Providing access to frontline (store) colleagues:** At the start of the project and at the initial launch, frontline colleagues did not have user accounts to access digital resources. Work to integrate HR systems with identity management systems focused on providing user accounts and licenses for these colleagues. But the bigger challenge was figuring out how to distribute so many account credentials to so many people across so many locations.

  This was accomplished by creating an Excel spreadsheet with each frontline colleague's first and last name, store number, and UPN (the username they need to enter the system).

This list was shared with store managers via flip, along with instructions on how to filter it by store number, then print multiple copies for their store.

Also, temporary passwords were created for each colleague using a formula that a colleague would be familiar with. Store management attached the printed username lists in a designated location on pre-printed posters. These posters, which also advertised the temporary password formula, were then placed throughout the stores where colleagues could look up their name, note their UPN, and get the password formula. Then, when they logged in for the first time, they were prompted to create a new password.
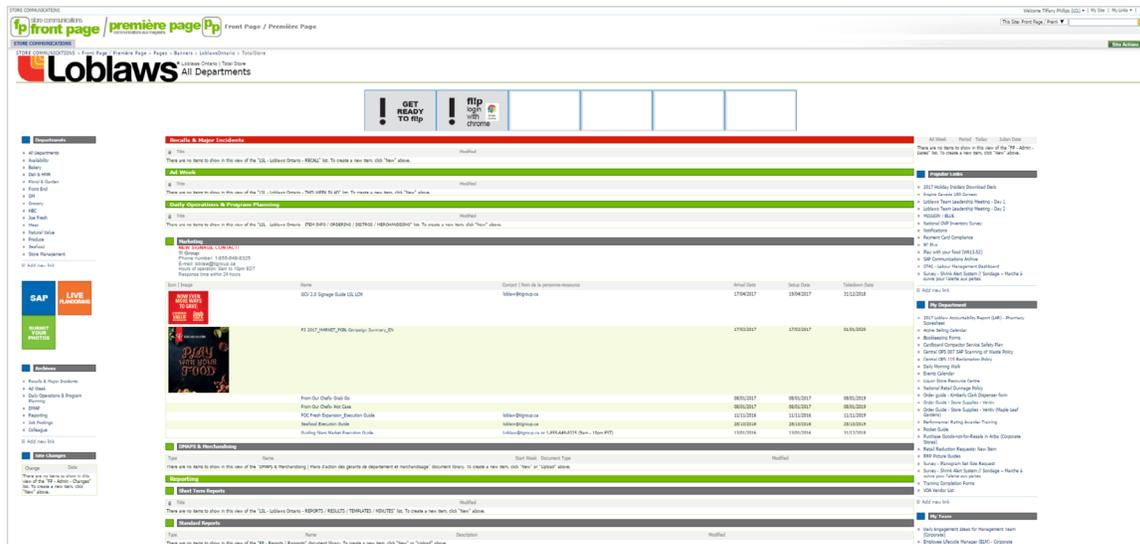


**Image 118. Loblaw's Previous Intranet Homepage.** Front Page, the site formerly used by Loblaw stores, was created in-house by a self-taught team using out-of-the-box SharePoint 2017 features. It had little visual interest and was difficult to navigate as it had a lot of text and links and no search capability.
*Loblaws_01_OldSiteFrontpage_Version.png*

# DESIGN REVIEW

## Homepage Personalized for Shared Services Store Support
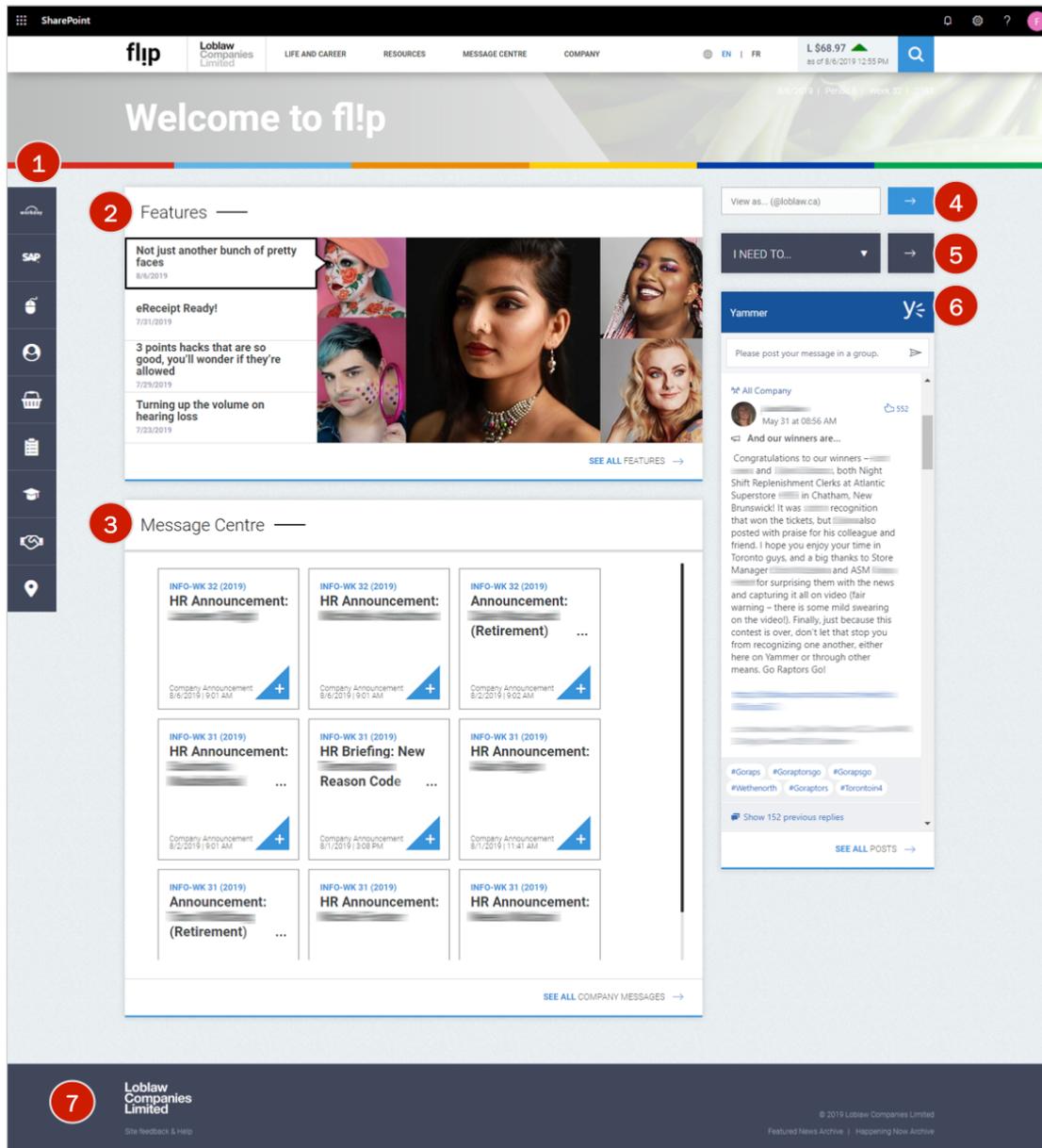


**Image 119. Loblaw Intranet Homepage (Shared Services Store Support).**
Homepages are personalized based on the logged-in user's role. The homepage
for employees in the Store Support division is one such example. It features links
to apps, news, messages, and more—all targeted to the user.
*Loblaws_02_HomepageSharedServicesStoreSupport_Live.png*

## Homepage (Shared Services Store Support) Highlights

Homepages are personalized based on the logged-in user's role. The logo and various other elements are displayed depending on the user's division.

A personalized homepage for employees in the Store Support division uses the style, menu, and layout for that division, and also targets content based on user role.

1. **Links to tools:** Employees can access various systems and tools beyond flip in the Loblaw digital workplace. The list of icons that appears vertically down the left side of the page offers quick access to tools targeted to the user's role.

2. **News:** The *Features* section at the top of the page includes news stories, each selected based on the logged-in user's role. The carousel presents a list of four items, each with the title in large, legible text, followed by the item's publication date. Story topics can include anything from a behind-the-scenes view of something the company is doing publicly to stories about the daily lives of colleagues. The *See All Features* link is easy to spot and leads to a page with more features. These feature stories help employees learn more about their business and colleagues, and can help them feel more informed and connected with one another.

   For the Store Support employees' homepage in particular, story topics span all areas of Loblaw, as these employees are likely to engage frequently with multiple other divisions.

3. **Announcements:** The *Message Centre* is in the middle of the Store Support employees' homepage, which is a good location to help ensure that employees see its posts. The section displays announcements from the previous seven days that apply to the user. Each message appears in a simple, square card packed with information such as: the type of message (Info, Action, Recall, etc.); the week it was posted; the subject and division; and whether it has been read by the user. Employees can also use the scrollbar on the right to see additional recent messages. Clicking the *See All Company Messages* link opens a page of messages. Tabs at the top filter announcements based on whether they are *Recalls* or *Store Messages*. The number of new items appears in a circle in the tab, alerting users of new announcements. When Store Support colleagues click *See All Company* messages, they are taken to the full *Message Centre* (same as if they had clicked from top nav) and see an archive of all company messages. This is also where they can view store recalls and store messages.

4. **See other homepage content:** While targeting content pushes the best information to the user, some people may need to see homepages for multiple divisions. The *View as…* feature in the upper right is available only to the core flip team; it is used as a troubleshooting tool so that team members can validate what other users are seeing on their homepage. This helps them identify any issues someone might be experiencing, as the homepage is dynamic for everyone.

5. **Task assistance:** Links to tasks related to the logged-in user appear in the *I Need To* list in the upper right. This is a great place for linking to help about important, common, or seasonal activities (things that users don't do often, but that are important to attend to now). For example, when annual performance reviews begin, *I Need To* houses a link to resources about annual reviews. Expense reporting is another example. *I need to submit an expense report* links to the expense form, as well as to a list of resources related to the form, including a step-by-step guide, a list of vendor numbers, and a form to request a vendor number.

6. **Yammer:** The Yammer feed, if there is one for the user's division or company, displays in the right rail. The most recent entry, including the number of likes and a link to comments, appears on the page. This can entice employees to see how their colleagues are weighing in. Tags at the bottom make it easy to investigate a related topic.

7. **Footer:** The small footer at the bottom of the page offers links for *Site feedback & help*, the *Featured News Archive*, and the *Happening Now Archive*.

## Homepage Personalized for Store Management



**Image 120. Loblaw Intranet Homepage (Store Management).** The homepage that is personalized for No Frills Store Management displays the *Message Centre* at the top of the page, since this is a sanctioned place for in-store employees to find information about products.

*Loblaws_03_HomepageNoFrillsStoreManagement_Live.png*

## Homepage (Store Management) Highlights

Employees in stores need to stay on top of information about all of the products the store sells, and flip is the go-to place for this accurate, time-sensitive intelligence. It's also the go-to place for store operations staff members to find the information they need to keep the stores running smoothly.

The homepage personalized for the No Frills Store Management offers some of the same sections, though positioned differently, as the homepage that's personalized for Shared Services Store Support. It also offers different sections and content.

1. **Announcements at the top of the page:** For employees working in stores, flip offers critical information for day-to-day operations. Since the *Message Centre* is the approved channel for this type of information, this section appears at the top of the content area. Cards include information about products, supply, and recalls.

2. **Store resources:** Only users with the Store Management personalized homepage see the *Store Resources* section. It appears directly below the *Message Centre* and links users directly to a prefiltered view of the most recent and commonly used store resources. The six rectangular dark blue tiles have clear text labels, small accompanying icons, and a royal blue circle with a white number showing the number of new items (added in the last seven days) in each section. The *See All Store Resources* link at the bottom of the section makes it easy for store employees to access additional resources.

3. **News at the bottom of the page:** The *Features* section includes news stories related to store management and appears at the bottom of the page.

## Homepage Personalized for Frontline (Supermarket) Employees



**Image 121. Loblaw Intranet Homepage Personalized for Frontline (Supermarket) Employees.** A personalized homepage for an employee working at the Dominion supermarket immediately sees next-shift and scheduling information. *Loblaws_04_HomepageDominionFrontline_Desktop_Live.png*

## Homepage (Frontline Employees) Highlights

A personalized homepage for frontline employees—those who work in retail stores, such as supermarkets—displays information that supports their direct work with customers, along with other content related to their specific division. Various features help employees manage their time, payroll, and career.

1. **Logo:** The logo for *Dominion,* a supermarket chain, appears to the right of the flip logo, confirming for employees that they are on a homepage personalized to that store.

2. **Work shifts:** Having an adequate number of people staffing stores is a mainstay of great in-store customer service. To help ensure that employees are at work at the right time, flip displays the *Next Shift* section that clearly shows the date of the work shift, day of the week, and the start and end time. The *Jump to Schedule* link takes users to their full schedule.

3. **Schedule:** Hourly employees can use the *My Schedule* section to see their schedule (through the *Schedules* tab), change shifts with a coworker (through the *Swaps* tab), and request and review time off (through the *Time-Off* tab). A legend at the bottom of the calendar delineates the meaning of the status icons—such as *Pending Time Off* and *Not Approved Requests*—that appear with the timeslots.

4. **Connect and improve:** Loblaw believes in helping to create and cultivate coworker relationships. The Yammer feed in the right rail helps people make connections. Training options are available via the graduation cap icon in the toolbar on the left.

5. **Payroll:** The dollar sign icon in the toolbar on the left allows employees to easily access their payroll information, which is highly important to employees.

# Banner and Global Navigation
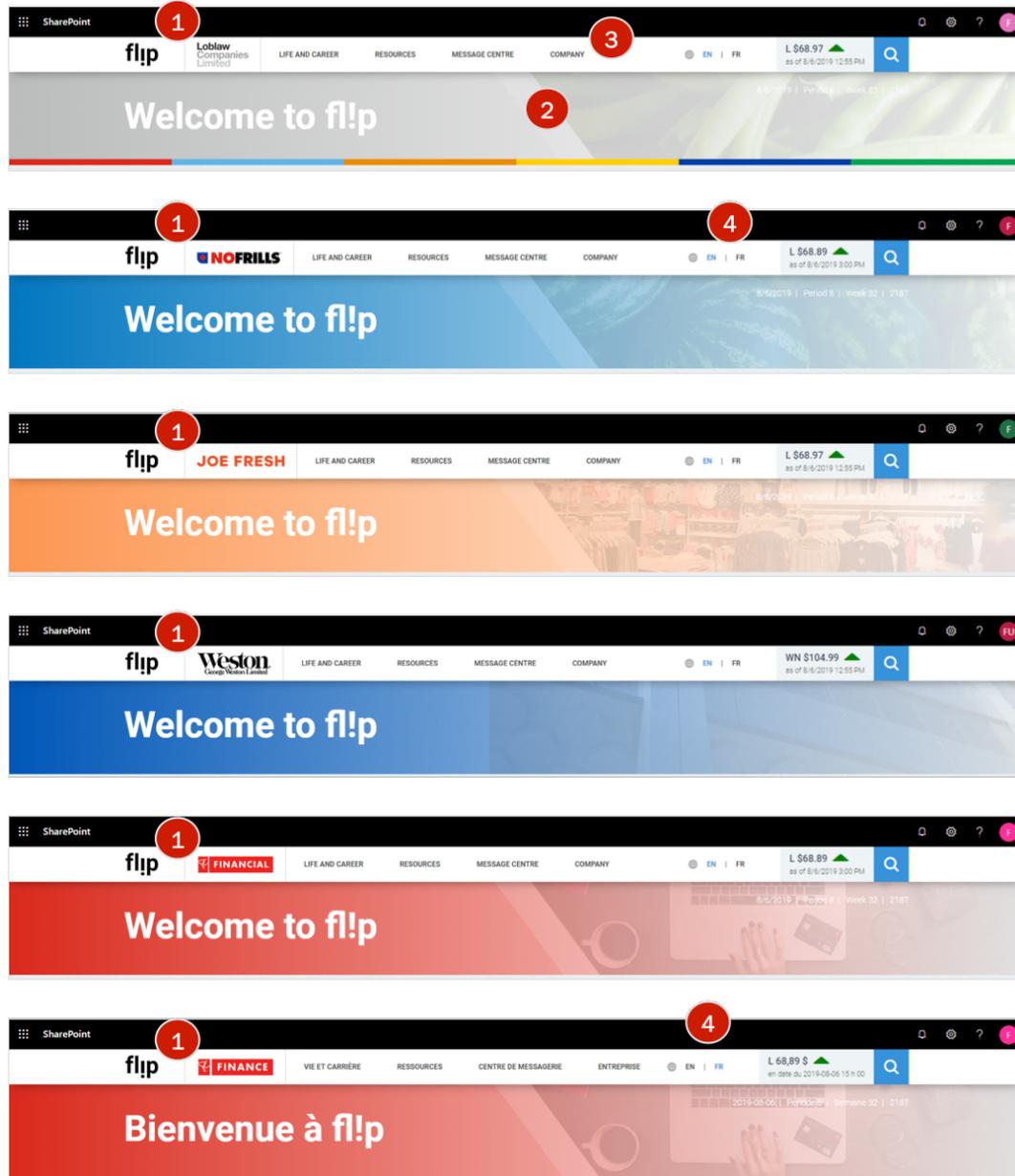


**Image 122. Loblaw Intranet Global Banners.** The logo and banner at the top of pages changes depending on the logged-in user's division.

*Loblaws_05_banners-and-global-nav.png*

## Banner and Global Navigation Highlights

To instill in employees a sense of community about both the company as a whole and their division, page banners are personalized—using color, logo, and background images—to reflect the logged-in user's division.

1.  **Logos:** The flip logo appears in the upper left, identifying the intranet and where the user is in the Loblaw digital workplace. The logo for the logged-in user's division appears to its right; this further orients users and helps communicate that they are seeing flip content targeted by their division. The content also adapts depending on the language the user is viewing the site in.

2.  **Banner:** The logged-in user's division dictates the banner and its background image at the top of the page. For example, Loblaw Companies Limited and No Frills both display images of produce along with colors found in the respective brand's guide. Likewise, Joe Fresh shows an image of clothing on racks. "Welcome to flip" is the default message, but the company often uses this space to recognize important events or dates (e.g., displaying "Happy Pride" during Pride Week) or to amplify in-store programs or campaigns. Those messages can be targeted by division and/or banner, as required.

3.  **Global navigation:** The global navigation menu appears at the top of pages, to the right of the logo. The four top-level menu items—*Life and Career, Resources, Message Centre,* and *Company*—are offered for all divisions (except *Message Centre*, which is not offered for frontline employees). Links under the top-level menu categories are targeted based on the user's company, persona, and division, and on whether they are a franchise store or an executive. These links can lead to internal or external resources; they are arranged horizontally on desktop but collapsed under an icon on mobile.

4.  **Language:** The flip intranet is available in English or French. The default language is automatically selected based on the user's location, but users can easily change languages using the *EN* and *FR* links in the upper right. The selected language appears in black, while the selectable language appears as a blue link, a signifier that it can be acted upon.

## Tools and Apps Access
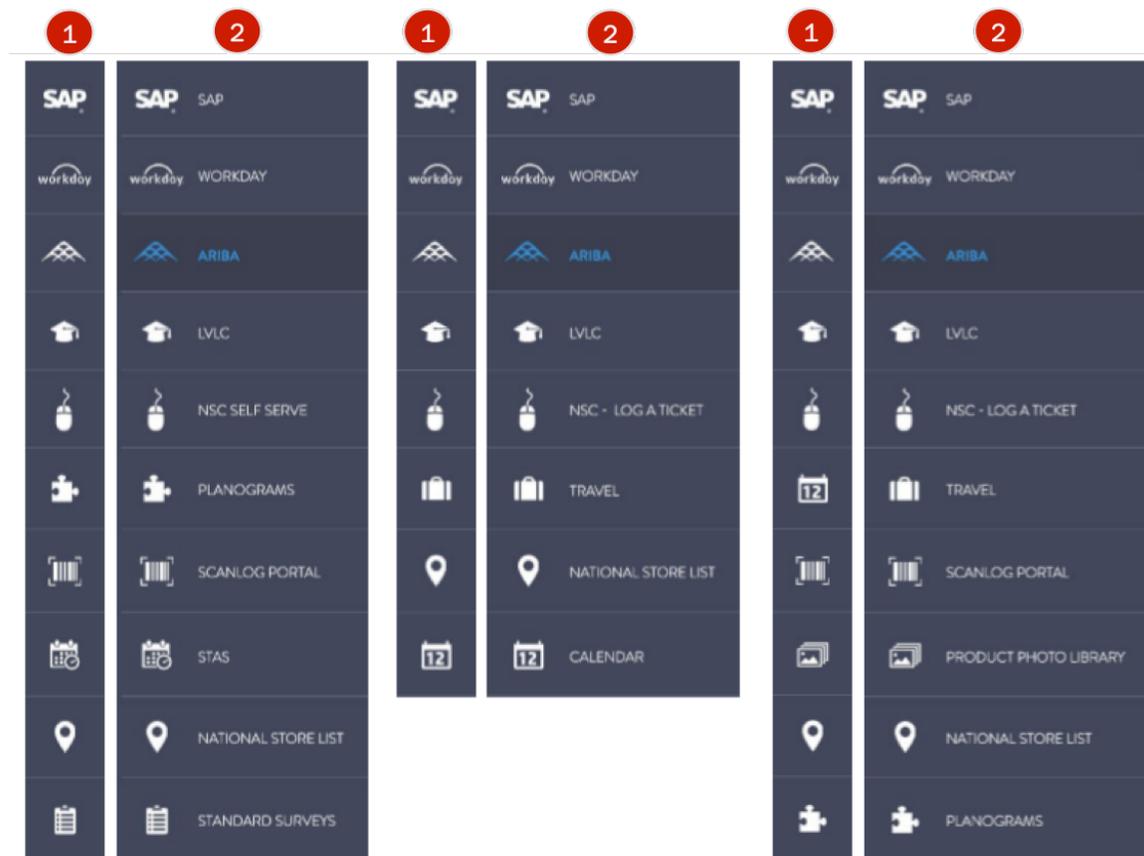


**Image 123. Loblaw Intranet Toolbar.** A toolbar on the left side of the homepage links to tools and important resources for the logged-in user. Three different personalized toolbars demonstrate that a different set of tools, as well as a different number of tools in that set, can benefit the needs of diverse employees.
*Loblaws_06_StyleGuide_Quicklinks_cropped-no-text.png*

## Tools and Apps Access Highlights

Access to important resources is a snap on flip. Targeted to the logged-in user's role, the homepage's left-side icon bar offers links to the user's key tools. Which icons are shown, as well as the total number displayed, depends on what would best benefit the user.

1. **Collapsed:** Icons make the tools easy to see and access on the homepage. This feature offers great benefits, while the narrow column uses only a small amount of screen real estate, leaving room for other important information.

2. **Expand:** On desktop, when users move the cursor over the toolbar, it expands to reveal the a text link with the tool's full name. This provides immediate assistance for users who are unfamiliar with a tool's icon. When viewed on mobile, the icon bar is positioned under the hamburger navigation menu icon.

## Mobile Homepage
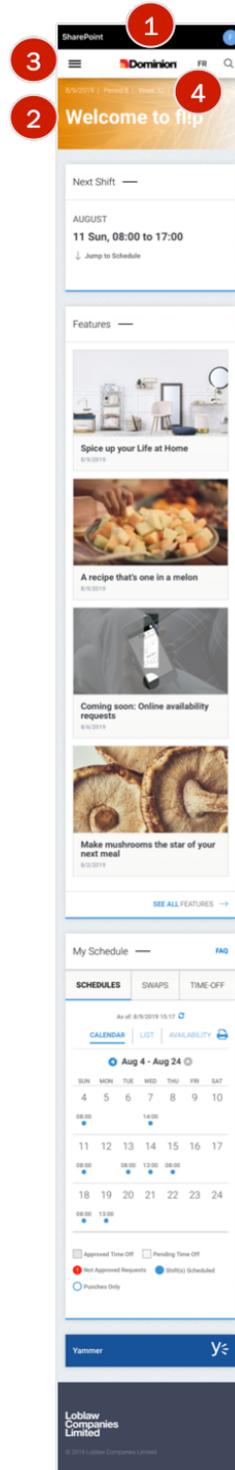


**Image 124. Loblaw Intranet Mobile Homepage.** Viewed on mobile, the responsive site's homepage assists in-store employees with managing their work shifts and more. *Loblaws_07_HomepageDominionFrontline_Mobile_Live.png*

## Mobile Homepage Highlights

The many pharmacy and in-store workers can access important work-related information via mobile. The responsive site reorganizes content and changes UI elements from the desktop version for productive mobile use.

1. **Logo:** On mobile, the store (or division) logo remains at the top, but the flip logo disappears. With limited space, one logo had to go; because flip is mentioned in the banner, removing its logo was the best tradeoff.

2. **Banner:** While shrunk on mobile, the banner at the top of pages still acts as an anchor, featuring the division or store colors and background image.

3. **Navigation:** The menu, left-side icon toolbar, and stock price are collapsed under the hamburger menu to save space and allow room for content on the mobile screen.

4. **Language:** The current language link is eliminated to save space, showing only the link to the language that users can switch to if they choose.

# Announcements



**Image 125. Loblaw Intranet Message Centre.** The *Message Centre* includes timely announcements for stores about the company and product recalls. These are managed under three tabs.
*Loblaws_08_MessageCentre_AllStoreMessages_Live-a.png*

## Announcements Highlights

While announcements appear on the homepage for many employees, they also appear in the full *Message Centre* in three areas: Store Support, Merchandising, and Store Operations.

The *Message Centre* replaced static emails, eliminating many mass-email messages. It also makes it easier for employees to find messages and know which ones are current. Store employees see only messages that are relevant to them, which prevents compliancy issues and keeps clutter to a minimum.

Content providers have a simple wizard-like UI they use to submit, distribute, and maintain critical messages about timely topics, such as product recalls or emergencies. Based on the content provider's answers to a series of questions, metadata, targeting, and security factors are applied so that the content is visible only to the correct users.

1.  **Types of messages:** The tabs at the top of the *Message Centre* allow employees to see *All Recalls, All Store Messages,* or *Company Messages.*

2.  **Enterprise-wide announcements:** The *Company Messages* tab includes enterprise-wide announcements, such as executive messages from Loblaw's president, quarterly financial results messages, HR messages related to career and workplace, and other announcements related to the organization, division, team, or location. Store Support colleagues have access to any company message in which they are included as part of the targeted audience.

3.  **Recalls:** Store Support colleagues have access to the *All Recalls* tab, since they work with various divisions daily and may need access to this information.

# Announcements Filtering



**Image 126. Loblaw Intranet Announcements Filtering.** Filtering capabilities down the left side of the *Message Centre* make it easy for employees to find a message by type, department, or other factors.
*Loblaws_09_MessageCentre_AllStoreMessages_Live-c.png*

## Announcements Filtering Highlights

A large organization such as Loblaw is bound to have many announcements. Users looking for messages, such as about their department, are already spared some clutter because messages are targeted by role and location. They can also easily sift through and locate the pertinent messages using the facets on the left side of the *Message Centre*. They can even get quite specific by choosing items such as their department and the publish date range.

1.  **Filtering list:** Following known UI conventions, clicking the *Filter List* link with the plus sign (+) icon in the upper left of the *Message Centre* opens the list and changes the icon to be a minus sign (−). Users can also use the plus sign to expand and display the list of facets—such as *Bakery, Bulk Foods*, and *Coffee Shop*—within a topic.

2.  **Save and reuse search facets**: Once employees have selected a set of facets and find it valuable, they can save that search and easily repeat it later. The *Save Applied Filters* button in the upper right handily makes the save. The *Apply Saved Filters* drop-down above the list allows users to choose from their saved personal set.

# Product and Drug Recall Announcements



**Image 127. Loblaw Intranet Product and Drug Recall Announcements.**
Recalls related to drugs, foods, and any other products the company sells are
communicated on the *Recalls* tab.
*Loblaws_10_MessageCentre_StoreRecalls_Live.png*

## Product and Drug Recall Announcement Highlights

To ensure customer safety, as well as to ensure that only high-quality products are sold, recalls directed at any store or pharmacy appear in the *Recalls* tab. Here, Store Support employees can see and act upon any recalls, and even export a compliance report if needed.

1. **Details:** The official recall number, location or area the recall pertains to, and the date it was posted, appear on the recall card in the *Message Centre*. It's helpful for employees to see so much pertinent information in each card.

2. **Status:** Store Support employees can view all the recalls and see which stores have read each one. The *Complete* or *Incomplete* label at the bottom of each card communicates that status and provides announcement details.

## Announcement Details
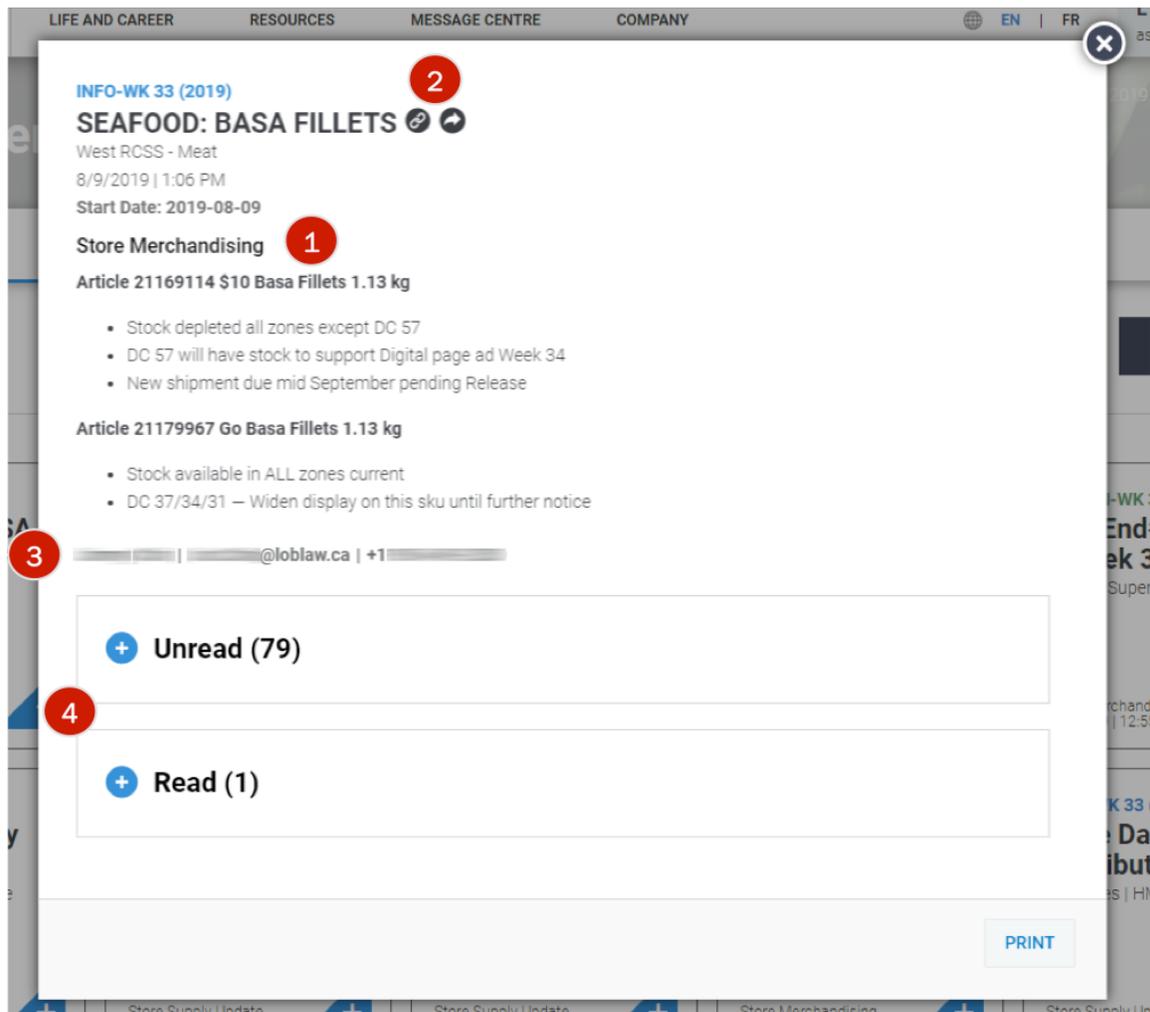


**Image 128. Loblaw Intranet Announcement Details.** Each message opens in a dialog and includes pertinent information, including which stores have read the announcement and contact information.
*Loblaws_11_MessageCentre_AllStoreMessages_Live-b.png*

## Announcement Details Highlights

Each announcement message opens in a dialog and includes pertinent information about the product recall, including which stores have read it, contact information, and a few sentences summarizing the recall.

1. **Details:** Specifics about the recall—such as the start date, where the item is in stock, how to respond, and more—appear in the message.

2. **Share:** Through flip, employees can easily notify one another about a recall. The link icon to the right of the title enables the user to copy a link to share. As long as the link recipient has access to the recall message, they can read it. Clicking the arrow icon, just to the right of the link icon, launches the user's email client and copies the message into an email, making it abundantly easy to share the recall details with a colleague.

3. **Contact:** A contact name, email, and phone number appear at the end of the recall announcement. With this, employees can ask follow-up questions if needed.

4. **Who has read it:** Clicking the plus icon by the *Unread* and *Read* buttons displays a list of stores who have read or not read the message.

## DESIGN PROCESS AND USABILITY WORK

The team based its project research approach on who it would be talking to and the information it expected to learn. For example, the team could sit next to corporate employees at their own desks and conduct observation sessions that combined a structured interview with exploration on the current state platforms. This method let the researchers directly observe user patterns, pain points, and opportunities.

For frontline employees, the team gravitated toward surveys that gather larger amounts of data or small group interviews, which let team members discuss ideas for potential features, barriers to use or adoption, and so on.

The overall project was executed through three major phases, beginning in January 2015. The three phases played out as follows:

- **Phase I—Roadmap:** During an initial roadmap phase, the team conducted research using a variety of methods, including: reviews of the current state experience and other relevant assets; visioning sessions with key stakeholders and leadership to understand the opportunities and pain points from their perspectives; voice-of-the-user sessions with many types of employees to build a holistic understanding of the broader opportunities and problem areas; and a nuanced understanding of the different types of audiences and their unique needs. Then they created personas that focused on each user type's key pain points, tasks, expected gains, and critical features and functionality. By looking at the project through this user-centric lens, the team was able to prioritize initiatives and requirements according to their relative value to users.

  This research formed the baseline understanding for team members as they embarked on building out the roadmap and vision, which stretched a number of years into the future and was walked-back to form the direction for the first project phase.

  A few key activities stood out as pivotal during the Roadmap phase.

  - **Voice-of-the-user sessions:** Twelve voice-of-the-user sessions were conducted during the roadmap phase. In these sessions, core project team members and representatives from Rightpoint traveled to four cities in Canada (Montreal, Ottawa, Toronto, and Calgary) and met with colleagues at their stores to do interviews, brainstorm, and conduct surveys. During these sessions, they met with more than 120 colleagues representing different business areas and levels within the company.

  - **Survey:** Following these voice-of-the-user sessions, an online survey was conducted and received more than 480 responses.

  - **Requirements matrix:** The team assembled a requirements matrix from the data collected during the voice-of-the-user sessions. In this matrix, each of the requirements was weighted according to technical complexity and business value

to create a business priority graph. Then they performed additional analysis to identify business drivers and constraints to help shape the roadmap.

- **Personas:** Personas were created to represent the perspectives of different user types and the functionality that would best support them.

- **Phase II—Creative/technical design and content strategy:** The second phase involved Rightpoint's UX, creative design, technical design, and content strategy teams working together with the Loblaw communication team to create detailed wireframes of pages and functionality, as well as a style guide. The Rightpoint teams also helped the internal project team identify the IA needed to integrate the intranet with other systems. This was all aggregated to provide the implementation team with everything it needed for its work.

- **Phase III—Implementation:** During this phase, the Rightpoint team worked with the internal project team to determine the minimal viable functionality needed for the product release. Implementation work was carried out over a series of sprints to provide a "show and tell" to transfer knowledge from the delivery team to the communication team so the latter could learn about the new functionality and provide feedback.

  The first release took two sprints to complete. These sprints were focused on completing the foundational work needed so that the project team would be able to pick and choose which functionality to work on in the sprints that followed. This approach helped the communication team see the incremental progress being made and gave it an opportunity to provide feedback or quickly adjust the implementation. It also gave the communication team an opportunity to consider having an internal, business go-live preview once it felt that enough functionality was ready to demonstrate value to users.

Research work didn't end at launch. Loblaw's internal intranet team is deeply committed to creating a best-in-class UX, which has meant engaging with employees in an ongoing manner so that the team can understand how well things are working on the new intranet and what it should focus on next.

## Adoption/Buy-In

Buy-in for this project started with Loblaw's store operations teams, who recognized the opportunities that the intranet would create for better store execution.

The company's most senior executives were excited about the chance to communicate with frontline colleagues—who are the largest part of Loblaw's workforce, yet they had no direct line of communication. At the time, the company was investing heavily in customer-focused technology; the idea of treating colleagues with a similar, consumer-grade experience was appealing.

To drive adoption, the team put the most relevant and useful content front-and-center to create a site that colleagues would want to visit and an experience that they would love.

One of the best examples of this is the flip experience for frontline workers. The design team knew that the most desirable content for these colleagues is their schedule. Prior to flip, store employees relied on a paper schedule that was posted in-store—which meant they had to travel to their store weekly to find out when they were working. Team members worked alongside the scheduling team to ensure that they could surface schedules right on the flip homepage. This feature has proven to be quite successful, as evidenced by a 74% frontline employee engagement rate to date.

The team applies this type of approach to all content that goes on flip, ensuring that the site remains relevant and fresh, and is a trusted source for information.

| Working with Outside Agencies | |
| --- | --- |
| Agency | Project Role |
| Rightpoint<br>A strategy, UX, creative design, and technology agency | Created the project roadmap, designed the IA, conducted voice-of-the-user sessions with relevant user groups, created the style guide and visual design, designed the technical architecture, performed the implementation, and provided Service Desk support services. |

## GOVERNANCE

The flip team is part of the Corporate Affairs and Communication group. Placing the intranet team within this group created new roles and new ways of working. These new roles include:

- **A two-person editorial team:** The editorial team manages homepage features with a newsroom-like approach. This team works closely with the internal communication team to identify newsworthy content; it also works with a roster of freelance writers to ensure flip offers high-quality storytelling with a consistent voice and style.

- **Analytics lead:** This person is responsible for pulling user data from flip into Power BI and building dashboards that make it easy to spot trends and issues. These insights help the team make content decisions to ensure that the site contains the most useful tools and information for colleagues.

- **Yammer community manager:** This manager's job is to monitor and encourage Yammer conversations, answer questions, and encourage connections between colleagues, and also to help ensure that through those connections great stories surface.

Having a dedicated team own the intranet ensures that content is always fresh, style and voice is maintained, and the site is constantly improving through enhancements.

## Intranet Team Responsibilities

| Role | Responsibilities |
|------|------------------|
| **Core flip Team** | Governance and management of site and team:<br>• Maintain flip style, voice, and tone<br>• Leverage ongoing user feedback and analytics to help identify, prioritize, and provide business requirements for site enhancements<br>• Identify future integration opportunities and champion the colleague digital experience by working with other business teams<br>• Administer the flip Yammer group, where colleagues often ask questions and suggest site content |
| **Editorial Team** | • Develop and govern editorial content strategy<br>• Maintain editorial calendar, ensuring that the most timely, relevant, and engaging content is scheduled and targeted to the correct audience(s)<br>• Develop and write feature content or assign features to freelance writers; work with creative team on accompanying photos, graphics, and videos<br>• Develop amplification strategy, which includes Yammer posts and external social sharing<br>• Review, edit, and publish daily content<br>• Monitor analytics to inform future content decisions<br>• Maintain internal pages to ensure that content is current and relevant<br>• Evaluate new page requests to ensure that they meet flip criteria and fit in the IA; develop content for approved pages |
| **Communication Analysts** | • Review all incoming message center, store, and work resources submissions to ensure that content meets flip guidelines and standards and is targeted appropriately; this is a high-volume job, with hundreds of requests coming in each week<br>• Work with content providers on complex message and resource requirements<br>• Train new content providers<br>• Identify opportunities to improve content |

| Analytics and Insights Team | • Develop and maintain a series of analytic dashboards that flip stakeholders can access to assess site and content<br><br>• Provide ad hoc reporting, as required |
|---|---|

## URL AND ACCESS

| Access Information | |
|---|---|
| **Item** | **Status** |
| URL | https://flip.ca |
| Default Status | On corporate devices, flip is set as the default homepage and a flip icon is on the desktop. Users cannot change the setting on these devices. |
| Remote Access | Users can also access flip from any device with an internet connection by navigating to flip.ca and entering their username and password. |
| Shared Workstations | Loblaw store managers do most of their work face-to-face on the store floor, serving customers and helping colleagues. When they need to go online to access flip or other tools, they use shared workstations located in colleague-only store areas. |

# TIMELINE

| Project Milestones | |
|---|---|
| Milestone Date | Milestone Description |
| September 2005 | • Launched Loblaw Inside, the company's first corporate intranet, to approximately 8,000 corporate office colleagues |
| 2010 | • Redesigned/replatformed Loblaw Inside, moving from Dreamweaver to SharePoint 2007<br><br>• Introduced distributed content publishing model for Loblaw Inside<br><br>• Launched Front Page, Loblaw's store communication portal, built in SharePoint 2007; this replaced email as the primary means of all store communication |
| January–April 2015 | • Launched discovery and roadmap for redesign project to bring together Loblaw Inside, Front Page, and several smaller internal sites |
| September 2015–February 2016 | • Design phase<br><br>• Content audit, review, and strategy<br><br>• Wireframes<br><br>• Style guide<br><br>• Visual design<br><br>• Technical design |
| March–July 2016 | • Evaluated Google and Microsoft to make a business decision on a complete platform (including email, web applications, and collaboration tools) |
| September 2016 | • Planned sprint-based delivery and revisited functionality priorities; set up features and backlog; and documented acceptance criteria of backlog items |
| October 2016–January 2017 | • Foundational release and automation testing |
| October 2016–May 2017 | • Content audit, review, and migration decisions |
| April 2017 | • MVP release |
| May 2017–June 2017 | • Created new content and migrated existing content |
| June 2017 | • Launched to PC Financial Division (~200 colleagues) and decommissioned PC Financial intranet |
| July 2017 | • Launched to all Store Support (office) divisions and personas; decommissioned Loblaw Inside |

| October 2017 | • Introduced *Message Centre*<br>• Launched to store management |
|---|---|
| March 2018 | • Held frontline focus groups to test content ideas and themes prior to frontline launch |
| April 2018 | • Launched to corporate, non-union frontline colleagues in two banners only |
| July 2018 | • Launched to George Weston Limited and Choice Properties REIT<br>• Held frontline focus groups to get feedback from people who had used flip and garner insights about scheduling needs |
| October 2018–January 2019 | • Rolling launch to all remaining frontline corporate colleagues |
| February 2019 | • Launched phase 1 real-time scheduling to frontline colleagues, including current and upcoming schedules, past punches, and time-off requests |
| August 2019 | • Launched phase 2 real-time scheduling to frontline colleagues, with the availability to swap shifts and view and change availability |
| **Overall redesign timeframe:** Approximately 4 years || 

## CONTENT AND CONTENT CONTRIBUTORS

### Users Are Eager to Contribute

The flip team has experienced few problems with getting content contributions. Incoming requests exceed editorial capacity, which allows the team to be selective, choosing only the most relevant and engaging story angles for the homepage.

Because flip is now the company's only intranet and its main internal communication vehicle, most internal teams want their content posted. That's not to say the system is perfect, but it mostly works quite well. When team members encounter content outside of flip, they meet with the content owners to highlight the benefits of moving it to flip, including that it will be easily found via search; it can be appropriately targeted and secured; and they can take advantage of flip analytics to learn about how people are using their content.

Content responsibilities vary by site area.

- **Homepage content:** Feature stories and *Happening Now* content are centrally owned and managed by the flip editorial team. The team accepts story idea submissions from anywhere in the business and evaluates them against the flip content strategy. Story ideas

that make the cut are either produced by the flip team, the internal communication team, or external freelancers.

- **Interior page content:** Interior flip page content is created collaboratively with the flip editorial team and the subject matter experts, with the flip team providing final approval and publishing the content. When new pages are requested, the flip team assesses them for alignment with the flip content strategy; if the pages align, the team finds an appropriate home for the new content in the IA. The team then provides a content template so the subject matter expert can provide the key information required for the flip team to draft the page.

- **Message Centre and store/work resources:** There are approximately 600 people who regularly contribute content to flip using the flip requests intake process. These people are typically the subject matter experts for the content they are uploading. There are three types of content:

  - **Targeted messages.** The majority of these messages are operational messages for stores (approximately 180 per day).

  - **Store resources.** These are documents that stores need to run their business.

  - **Work resources.** These are documents and forms required throughout the business, such as policies, HR materials, reference documents, learning resources, templates, and forms.

## Training

The flip team has created comprehensive guides to walk content providers through the process so they can easily upload messages and resources. It also holds regular in-person training sessions with new content providers and provides one-on-one support as required.

## Maintaining Content Quality

Either the flip editorial team (homepage content and pages) or the flip communication analysts (*Message Centre* and store/work resources) approve content prior to publication. The team also conducts ad hoc reviews to ensure that content remains fresh and is updated as required. Future analytics improvements will make these reviews more rigorous and help the team identify documents and pages that either have not been accessed or have had limited views within a predetermined timeframe so they can be reviewed.

Analytics are also useful for improving the site content. By reviewing the content that is most (or least) accessed and who is accessing it, the team can gain insights into which content is working and which content needs improvement. The team also regularly reviews search data for the same reason. If it sees a spike in a specific search query, or a query returns no results, the team will investigate to see if the spike is indicating an opportunity to create or improve content.

Duplicate or contradictory content is not often an issue because the central content team often identifies it before it is published.

## Culling Content

Culling content was a significant part of the project, specifically when deciding what needed to move from the old corporate intranet, Loblaw Inside, to the new site. An initial content inventory revealed 22,000 pieces of content on the old site, with 63 percent of it contained in documents (mainly PDF, Word, or PowerPoint). The flip content lead was able to quickly reduce that number by eliminating three types of content:

- Any content that was more than three years old (72% of documents)
- Duplicate content
- Content that was out-of-date, which was obvious from just the title

The team was left with 7,000 pieces of content that needed subject matter expert review to determine if it should be moved to the new site.

The content lead met with content owners individually, providing each with a spreadsheet of their existing content and a specific set of questions to ask themselves as they reviewed their content:

- Is the content current?
- Is it accurate?
- Does it reference outdated programs or past deadlines?
- Will colleagues access this item frequently? Put yourself in the mindset of a user.
- Is the information already available elsewhere?
- Is there similar content available?
- Does it follow correct branding and content guidelines?
- Does it convey information effectively? Would another format be better?
- Who will maintain it going forward?

This last question was important as the team found that many subject matter experts were inclined to let old content stand, "just in case," until it was clear that they would need to own and maintain the content.

After the content owner review was complete, the flip team was left with a manageable 900 pieces of content to migrate.

## Message Centre and the Content Intake Process

*Message Centre* is a wizard-like intake form that allows content owners to upload different types of content to flip, including messages and store and work resources. The process guides content contributors through a series of questions; based on their responses, the system automatically applies the metadata, targeting, and security to ensure that the content is visible to the right users and, in the case of resources (documents), visible through search.

*Message Centre* is a major improvement over the old Store Communication site as its detailed targeting capabilities mean stores see only messages that are relevant to them. It also contains filters; so, for example, bakery managers see only the messages relevant to their department.

This targeting capability also means that stores can't see messages that are targeted to other stores, which prevents compliance violations.

*Message Centre* was designed primarily to replace the core functionality of the old store communication site (Front Page). The team extended it to nonstore colleagues, however, to replace the need for mass emails for company messages, which also means no more distribution list maintenance and no more lost email.

**Image 129. Loblaw Intranet Compose Store Messages Process.** The "compose audience" step of the message intake process makes it easy for content providers to create a message and add images or attachments. Users may need to upload one or more files to include with the message, and the form allows them to either drag-and-drop or browse and select files. An upload progress indicator is displayed for each file and—once completed—a checkmark displays to show that the upload is complete. If users need to remove an uploaded attachment from a message, they can select the remove button next to the list of uploaded attachments. *Loblaws_12_Intake_Message_Live-f.png*

**Image 130. Loblaw Intranet Compose Store Messages Process.** The next step in the compose process is to select which stores should receive the message. By default, all stores will receive a message if nothing is selected. A total count of stores that will receive the message is listed under the *Audience* section of the *Summary* area. Accordion controls listing division names contain checkboxes with the banners within that division, along with the number of stores within each banner. The same is true with *Provinces*, which lists the number of stores within each province. *Loblaws_13_Intake_Message_Live-g.png*
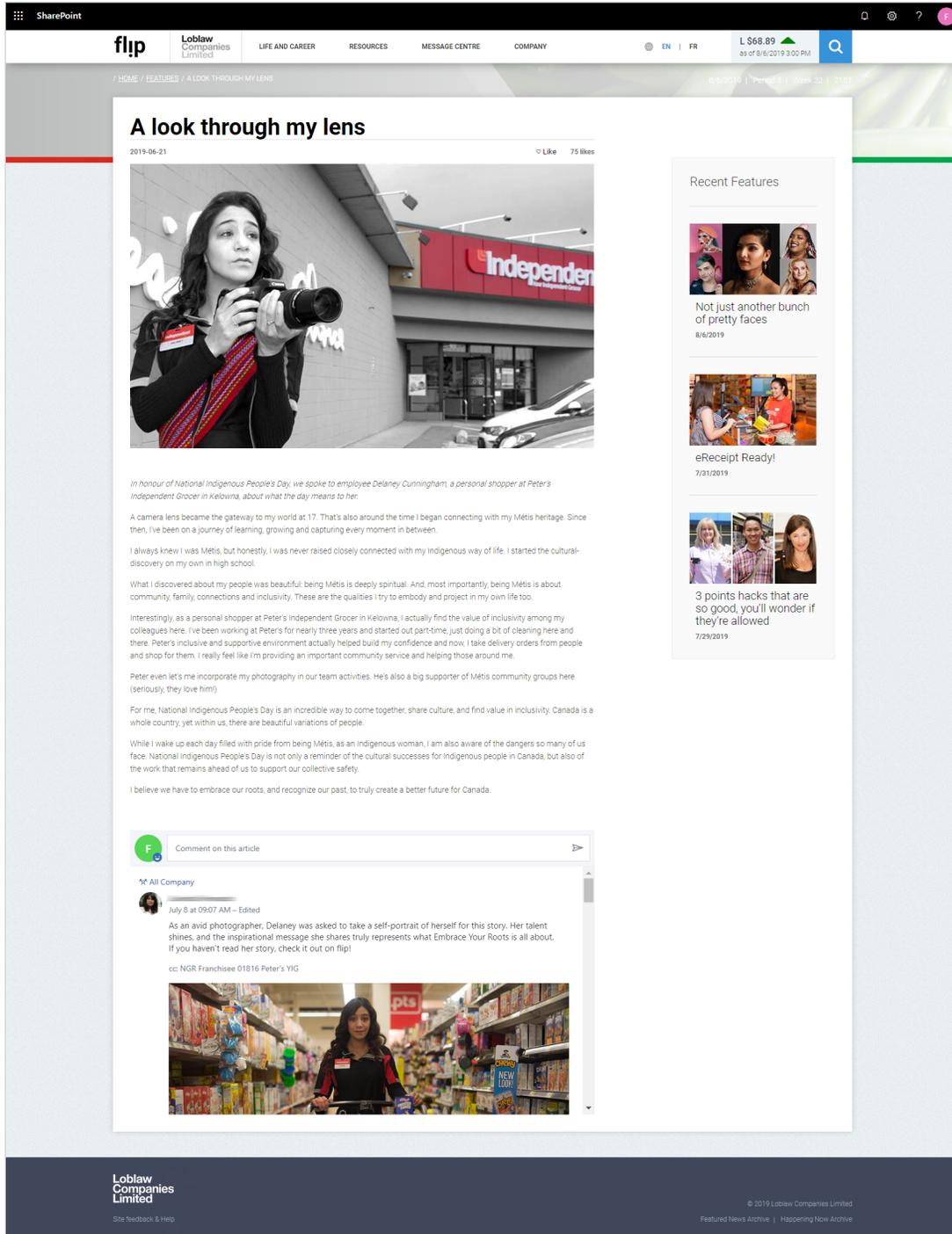
**Image 131. Loblaw Intranet Feature Story.** This shows a feature story in the desktop view. Stories include eye-catching images or video and short, colleague-focused content. Liking and commenting give colleagues ways to engage with the feature. *Loblaws_14_FeatureStory_Desktop_Live.png*

# TECHNOLOGY

| Technology | |
|---|---|
| **Category** | **Technology Used** |
| Web Server Hardware and Operating System | Office 365 and SharePoint Online<br><br>Microsoft Azure:<br><br>App Service Plan<br><br>App Service<br><br>CDN<br><br>Redis Cache<br><br>Azure Search<br><br>Azure SQL Database<br><br>Service Bus<br><br>Logic Apps<br><br>Application Insights<br><br>Azure Data Factory |
| Bug Tracking/Quality Assurance | Microsoft Azure DevOps for managing backlog, sprints, test plans, defect tracking |
| Design Tools | InVision<br><br>Sketch<br><br>Adobe Photoshop<br><br>Adobe Illustrator |
| Site Building Tools | Visual Studio<br><br>Visual Studio Code<br><br>ASP.NET Web API<br><br>ASP.NET MVC<br><br>Entity Framework<br><br>React and Redux<br><br>Gulp<br><br>SharePoint/Office 365 Developer Patterns and Practices |
| Content Management Tools | Office 365 SharePoint Online |
| Search | SharePoint Online Search<br><br>Azure Search |

| Other Functions | Microsoft Azure DevOps for automated builds and release management |
| --- | --- |
| | Qumu |
| | Xignite |
| | Ephox |
| | Yammer |

# MOBILE

## A Mobile-First Approach

Knowing that the majority of users would be accessing flip through a mobile device, it was important to approach the design with a mobile-first mindset. The team chose a responsive rather than an adaptive approach because of the wide range of devices used throughout the organization.

The goal was to create an experience that was similar regardless of device. The same content now appears across all devices and displays in a way that works best at each break point. This allows for full pages of content to be displayed on larger screens, with the same content available for smaller screens, albeit sometimes with a slightly different display appropriate to the screen's size. In some cases, content may be broken up into chunks of information that can be "opened up," as necessary, on a smaller device.

Starting with the small form-factor helped team members take a prioritized design approach, as they had to discern which were the most important pieces of content or actions at any given point in a user journey.

Once they laid groundwork for the mobile design, team members then designed across device sizes to ensure that the content displayed appropriately on any device.

## Understanding the Mobile Audience

Frontline (store) employees are a core audience for the Loblaw intranet experience, and their work environment dictates that they access the intranet in particular ways. It was thus important that the team understand the frontline context, including when and where these employees need access to online information and tools. For example, many frontline employees access the intranet only from shared computers in store break rooms or back rooms, and they don't necessarily have desktop computers at home.

Understanding the logistics of these workers' access was as important as understanding their shift schedule, their need to access important messages, who they work with, and other contextual details about their work lives. Optimizing the mobile experience for these workers was

of particular importance to the design team, so it focused its efforts on targeted tasks to serve this specific audience of mobile users.

The design team executed rounds of research (via multilocation focus groups and surveys) to determine which tasks and features were most in demand. One of areas that was shown to be important was scheduling. Users needed features to support tasks such as the ability to see their schedule, swap shifts, request time off, and list their availability. Scheduling was not initially included in flip, but research revealed that it was a much-desired feature for frontline colleagues so it was included in the design.

The team also held workshops and meetings with frontline managers and representatives from specific groups (such as pharmacy). Its goal was to try to understand potential barriers to adoption and which features would be must-haves to win critical endorsements from the various frontline groups.

By engaging with colleagues early in the process and before additional functionality was designed or built, the team collectively gained an understanding of the data-backed priorities of these users. It then applied this valuable input when planning additional features.

## SEARCH

### Search Technology

The Loblaw intranet utilizes two search technologies:

- **SharePoint:** The SharePoint search engine is used for indexing, ranking, and providing results for published article content, web pages, and documents hosted within SharePoint Online. Custom HTML display templates were designed and used to present relevant information about each result, depending on the content type.

- **Azure:** Azure is used for message-based content hosted within *Message Centre*. It is also used to help narrow the valid selections when users choose the message audience within the *Message Centre* form fields.
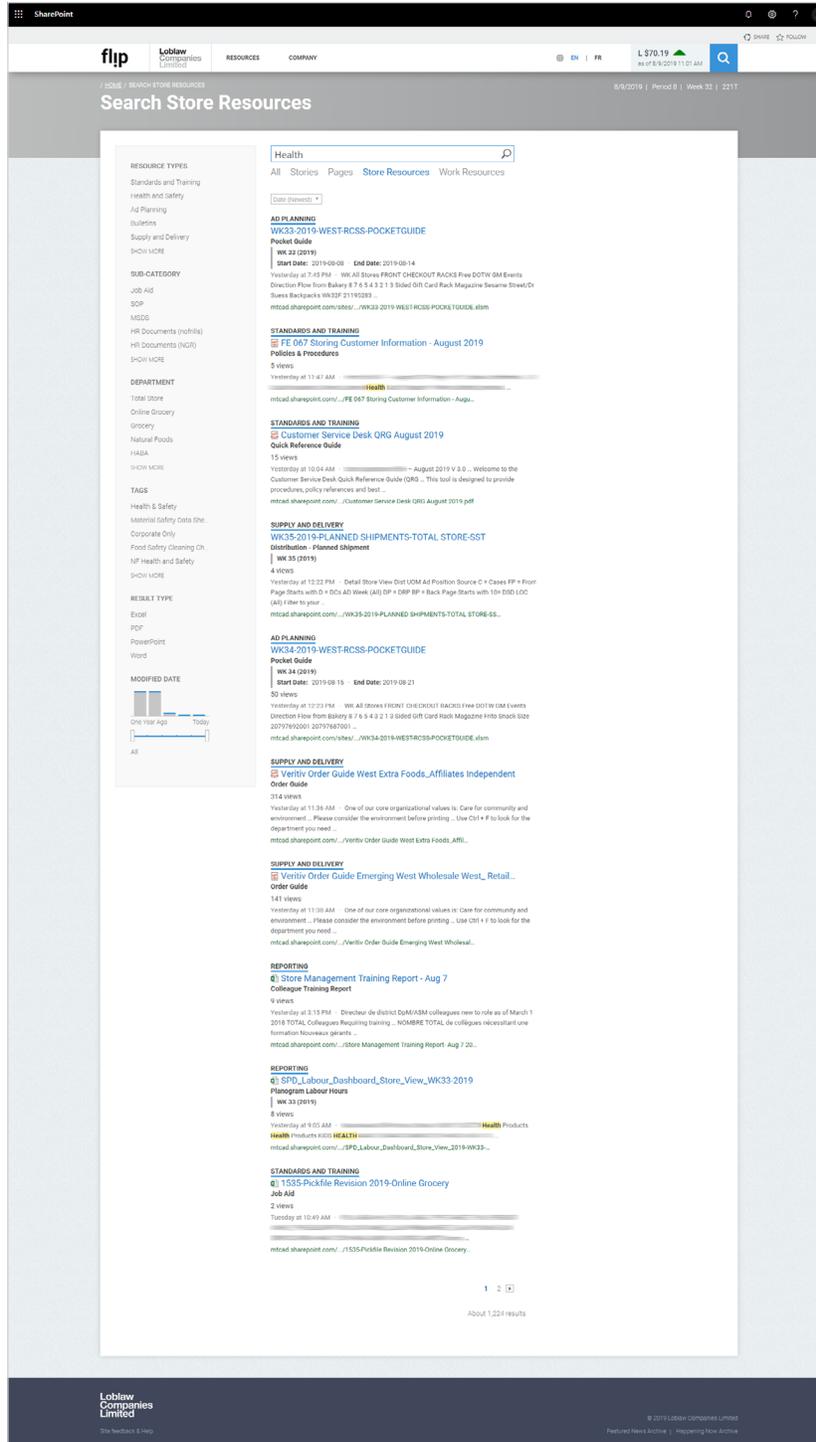
**Image 132. Loblaw Intranet Search Results.** Customized SharePoint display templates were created to show additional information specific to the type of content being returned in the search results.

*Loblaws_15_SearchResults_StoreResources_Live.png*

## YAMMER

Knowing that building friendships at work helps to improve employee retention, the team implemented Yammer to help develop a bond between coworkers. According to research, employees who have a friend at work are more likely to stay longer and be more engaged. Yammer is great way to foster these connections and encourage colleagues to make and fuel connections.

One of the top opportunity areas identified in the team's user research was: "online, two-way collaboration." Since flip is developed in SharePoint, Yammer was a natural choice for internal social networking.

Each user's personal Yammer feed is integrated into the flip homepage. This ensures that the most recent and relevant Yammer conversations are instantly visible when people log in to flip.

Loblaw has also deployed bots to ensure the company's Yammer guidelines are met. These guidelines prevent unauthorized employees from posting in the *All Company* feed and ensure that all new groups are created as private groups. There are many public groups available as well, but these require permission from the flip team before they are visible publicly. This approach differs from most Yammer deployments, but it is necessary due to the complexity of Loblaw's business and the need to ensure separation of content between corporate and franchise stores.

## ROI

### Meeting Deadlines

Early measures of return were based on the team meeting its deadlines. For example, prior to flip, the Shoppers Drug Mart division had access to a single intranet built on Google, which housed important tools and documents. It was critical to deploy flip prior to the end of the Google contract to provide a new home for those resources and ensure that work was not interrupted for the Shoppers' Drug Mart colleagues.

The launch of a new payslip solution presented another firm deadline to deploy flip to frontline colleagues. Without flip, it would have been difficult to communicate the change in payslips to those colleagues. Because flip was launched first, it was easy to add a quick link to the new payslip location, so colleagues didn't need to remember another URL or password, but could simply move from flip to the new payslip site.

### Tracking Metrics

The team also tracked stats such as unique site visitors and frontline reach to gauge the success of its communication plan. This was important for frontline, where nondigital communication methods had to be used to launch the platform. Similarly, stats such as dynamic scheduling usage illustrate the success of that feature, with more than 72% of colleagues interacting with the schedule in some way.

The team also regularly reviews several KPIs and metrics to keep a pulse check on the intranet's performance. Other measures include:

- **Unique site visitors:** By mid-2019, approximately 132,400 people had access to flip. Of those, an average of 70,000 were logging on each week.

- **Frontline reach:** The team actively tracks the number of colleagues who log on to flip. It also shares this data with store operations teams so they can intervene and assist stores with lower adoption rates.

- **Editorial content readership:** On average, 10% of those logging on each week click on the editorial content. This number has grown consistently since the site launched.

- **Editorial reach:** The team looks at the specific targeted groups to determine whether content is effectively reaching its intended audiences. In some cases, targeted reach is as high as 70%. Features with the highest reach are typically targeted to smaller teams with highly division-specific content. For example, PC Financial achieves high reach on quarterly business updates from the division president and on colleague profiles. As an example of the latter, one colleague shared his coming out story for Pride Month, and it was read by nearly 70% of his division colleagues.

- **Search queries:** The team tracks the number of queries and the number of queries that return no results.

- **Dynamic scheduling usage:** For stores using dynamic scheduling, the team tracks the number of interactions with dynamic features, such as creating or updating a time-off request.

The team also tracks success through subjective measurements:

- **Editorial engagement:** Recognizing that page views tell only part of the story, the team also tracks colleague engagement with editorial content through actions such as liking, commenting, and asking questions. Editorial content is often amplified through Yammer, so this activity is also tracked. The team uses the information to discern what percentage of people who click on a feature are compelled to act as a result.

- **Editorial themes and attributes:** The flip editorial team tracks things such as the theme of each feature (such as diversity or digital retail), the author, and whether the feature contains a video. The team uses this data to better understand which content resonates most with colleagues. For example: Do stories with videos perform better? Are there particular authors who attract more readers?

## BEST PRACTICES

Based on stakeholder interviews, user observations, current analytics, and other business-related requirements, the Loblaw team developed a solution that was focused on enabling and empowering all colleagues to improve their efficiency at completing everyday tasks. Paying attention to the details is what made this project and this platform succeed. Following are some of the things the team learned while doing this work.

- **A lightweight platform serves a wide audience.** "The overall design needed to be lightweight and incredibly user-friendly to ensure it was accessible within many different environments, settings, and connection speeds. The Wi-Fi capabilities within the stores were aging and not at professional speeds in most locations across the entire country. Loss of connection or heavy loads would be an instant barrier to engagement and would develop frustration and an overall loss of trust for the tool."

- **Give users the tools they need and they will succeed.** "Managers now have a dashboard to review their store's performance and employee efficiency, cost management, and sales. The *Message Centre* enabled quick action on items such as product recalls and spot promotions. This helps management improve workflow between corporate headquarters and stores. In order to help provide consistency, the store sales-floor planners, ad planning, signage, and training opportunities are also provided at a quick glance."

- **Context is critical for building successful user experiences.** "In a public and high-energy workplace, understanding the context for users is much more important than for an intranet within a more traditional corporate setting. While all the classic conditions around system usability, IA, accessibility, and engaging design are important, the challenges employees face in using the intranet can often be traced to external factors [in our industry]. Fully understanding the retail experience from the perspective of the employee on the floor helps us uncover opportunities to greatly improve the user experience. But this also comes with a need for investment in change management and governance policies that shift the perspective to support employees and managers in the field."

# United Nations (UN)

## COMPANY

The United Nations (UN) is an international organization founded in 1945. It is currently made up of 193 Member States and two Observer States. Due to the powers vested in its Charter and its unique international character, the UN takes action on the issues confronting humanity in the 21st century across four main pillars: Peace and Security, Sustainable Development, Human Rights and Humanitarian Assistance.

The Secretariat staff, made up of international civil servants and locally recruited staff, support the UN's work for peace and help the organization deliver on its commitment to people around the world.The UN provides a forum for countries to come together to tackle the most challenging issues of our time.

**Headquarters:** New York, US

**Locations:** The UN has offices all over the world; its 8 main offices are in New York, Geneva, Nairobi, Addis Ababa, Vienna, Beirut, and Santiago. It also has 5 regional commissions, 14 political missions, 14 peacekeeping missions, and many other regional and country offices.

**Locations where people use the intranet:** iSeek is accessible without login to staff at all UN office locations, and through mobile devices anywhere in the world via password protected access.

As of July 2019, 90% of UN Secretariat staff use iSeek as their only intranet. In 2015, that number was only 22%.

**Annual revenue:** The UN is a nonprofit organization. It is financed by assessed and voluntary contributions from its Member States.

## THE INTRANET

**Users:** All UN employees (approximately 37,500) use iSeek for internal communications and knowledge sharing. The platform helps staff located at duty stations and field missions all over the world keep up to date with new policies, find the information they need to do their work, and connect with colleagues.

**Mobile approach:** Responsive web design

**Technology platform:** Drupal 7

## LEADERSHIP TEAM

The UN Intranet-iSeek (designated as "iSeek" in the rest of this document) operates under the supervision of an editorial board composed of representatives from several departments in the UN, under the leadership of its Chairman, Maher Nasser, Director of the Outreach Division in the Department of Global Communications. It is led by the Manager of the Knowledge Solutions and Design Section, Helga Leifsdottir, and by the iSeek Team.

## CORE TEAM

Helga Leifsdóttir, Knowledge Solutions and Design Section Manager; David Mimran, iSeek Team Leader; **Team members:** Frédéric Fath, Annie Paprocki, Renée Luque, Stéphanie Spiegel; Sara Hohn, Consultant; Eric Hahn, Web Team (Development) Team Leader

## SENIOR LEADERSHIP

**Department of Global Communications / Outreach Division:** Maher Nasser, Director and Chairman of the intranet editorial board; Maha El-Bahrawi, Deputy Director; Ramu Damodaran, Deputy Director

## WIDER TEAM AND IT SUPPORT

**Web Team:** Catherine Pysden, Debra Ramsthaler, Sat Byell-Lee

**Graphic Design:** Ziad Al-Kadri, Team Leader; **Team Members:** Martin Samaan, John Gillespie

**Office of Information and Communications Technology:** Sirhan Chaudry

## INTRANET TEAM



***Team members shown here*** *(left to right): Stéphanie Spiegel, David Mimran, Fred Fath, Renée Luque, Helga Leifsdóttir, Annie Paprocki, and Eric Hahn.*

## HIGHLIGHTS ABOUT THIS WINNER

The UN Intranet-iSeek (i-Seek) is the primary internal communications and knowledge-sharing tool for the United Nations' global workforce. Accessible to 37,500 users across all UN office locations and through mobile access everywhere in the world, iSeek helps staff members in all duty stations and field missions keep up to date with new policies, find the information they need to do their work, and connect with colleagues.

A combination of global and localized content—accompanied by authentic imagery and video—bring people together while also providing a window into the people-first aspects of this distributed organization. With some users working in harsh or extreme environments, iSeek unifies staff under a shared mission. Like a standard intranet, iSeek brings tools and systems to employees' fingertips, but its human-centered approach to content and features provide staff with a greater sense of meaning and belonging. Those features include:

- **Emergency response:** When Haiti was hit with a 7.0 magnitude earthquake on January 12, 2010, the UN lost more than 100 staff members in a single moment. Editors from many offices utilized iSeek as an emergency hub and to honor staff members whose lives were lost while serving in a peacekeeping mission. iSeek's homepage design was changed from blue to black and grey, and the team dedicated an important part of its editorial efforts to drafting obituaries, which were posted daily on the intranet for more than a

month. This brought people together and reminded staff of the role that iSeek plays in providing a support system in the face of tragedy.

- **Expansive footer toolkit:** *The Toolkit* is the name for iSeek's stunning footer that appears on every page. It surfaces popular and frequently used links, which could otherwise be difficult to find in such a large site. It is tailored for each duty station and, because essential tools can vary considerably among duty stations and missions, iSeek works with Focal Points to select the right mix of tools and content to meet the unique needs of different user groups, while maintaining a core set of global links.

- **Integrated job search:** A powerful search connects job seekers around the world with the right UN opportunities. Having a robust global jobs section facilitates career development for employees, while also supporting the organization's core mission to serve countries and people around the world.

- **Purpose-driven app catalog:** Modernization is essential for the UN to carry out its mission and mandates, and enterprise systems are integral to those efforts. The global app catalog offers a quick, single-page view of all of the applications developed by the IT department. It provides links to launch the apps, helpful resources, and support.

- **Self-serve business card app:** An integrated app helps users create and customize their UN business cards from a standard template. Staff can choose from one of four beautiful back-of-card designs; the app then generates a dual-sided, print-ready PDF. Employees can print the cards themselves or take them to a print shop to complete production.

- **Worldwide classifieds:** The UN has a mobile workforce and staff members move frequently from duty station to duty station over the course of their careers. The intranet can help staff quickly sell their furniture in one location and rent an apartment in another duty station, all using the iSeek classifieds.

## BACKGROUND

### Uniting the United Nations

iSeek is the official internal communication and knowledge-sharing platform for UN staff. Like the wider UN, one of iSeek's goals is to bring diverse groups of staff members together.

Sometimes that can be challenging.

The UN comprises more than 37,500 employees dispersed across eight major duty stations and dozens of field offices. They deal with a wide array of issues, from socioeconomic research and human rights to international law and conflict resolution. Convincing people in these diverse roles that one unified platform could address all of their specific needs was not always easy.

iSeek was founded in 2005 at the direction of the Deputy Secretary-General, the UN's second-in-command. The project was housed within the Department of Public Information (DPI) (now the Department of Global Communications)—one of the nine main UN departments—with technical support and development under the purview of the IT department. As a top-level project, buy-in was guaranteed. So initially, persuasion wasn't necessary.

Fast forward to 2007, and iSeek was in crisis. A change in the UN's senior leadership meant that the project lost its buy-in and the small iSeek team was left with little authority to govern the internal communications systems created by other departments. The first to jump ship was the Department of Peacekeeping Operations, one of the largest UN departments. With vast field operations, Peacekeeping could not count on iSeek as a reliable tool to connect with its staff in locations where establishing a LAN connection was not possible. Moreover, iSeek's cumbersome CMS meant that loading an article could take up to 45 minutes—an efficiency cost that was simply too great to bear. Peacekeeping therefore chose to set up its own intranet on SharePoint.

Peacekeeping's breakaway compounded iSeek's challenges and the organization's overall efforts to unite its global workforce. Not only did iSeek lose a major contingent, it also lost its operating budget. And, because it could no longer rely on the financial contribution from Peacekeeping, iSeek was left with a (nonsalary) operating budget of only $5,000. With next to no funds, iSeek had limited ability to update its aging platform. Then, other departments began to follow Peacekeeping's lead and opt out of the platform.

The period between 2007 and 2015 was marked by an uphill battle to obtain a modern platform and the effort to persuade departments to move back to iSeek. Overcoming these obstacles required a long-term vision and strategy. It meant leveraging whatever resources could be found in-house and marketing iSeek as a valuable technological proposition. The team's approach was to try to engage allies first and skeptics later, and only then to persuade management.

Team members had to do many things to bring iSeek back, but their first task was to find a platform.

## The Search for an Efficient Platform

The impetus that led many departments to abandon iSeek was the platform's limited technological capability. So, the first step toward unification was to upgrade the platform. The team considered adopting WordPress as a quick, short-term solution, but WordPress was not a UN-sanctioned software at that time so the IT department would not be able to support it. The iSeek team understood that going it alone would not be a sustainable solution. In 2011, the UN finally adopted new IT standards and iSeek began its conversion to a Drupal-based CMS system with the ability to address the needs of its clients. Landing on Drupal was a huge step. But iSeek also needed a makeover.

## Reinventing iSeek from the Outside In

In 2015, a redesigned iSeek debuted. It had a dramatically different look and feel on a modern, responsive platform, and it came with a slew of new features and dynamic content, including: *Toolkit*, an extensive footer with links to important tools and information; *In the Spotlight*, a space on the homepage to advertise campaigns; a widget for the UN Twitter account; and a new events calendar. Contributors and editors were enthusiastic and appreciated that it was easier to add and manage content.

Concurrent with the redesign, the team also transformed its editorial policy to keep up with the era of short attention spans. The new policy reduced the length of articles to 350 words and gave contributors greater editorial authority. The goal was to help them improve the content and avoid UN jargon. This required constant effort, but the payoff was worth it as readership increased. New features, such as likes and comments, encouraged staff engagement. And later, in response to staff feedback, announcements and events were featured more prominently. These changes occurred in parallel with the technological improvements, which meant iSeek wasn't just shiny and new on the outside; it was fully refurbished and open for business.

## If You Build It, Will They Come? Maybe Not

The team hoped that the new design combined with modern features and useful tools would entice breakaway departments to return to the fold, but it just wasn't that easy. It took a lot of convincing and adapting to the needs of clients to make the reintegration happen. And some of the obstacles were ones it never expected.

One challenge the team encountered was with perception. Across the organization, iSeek was thought of as a "New York product." As such, departments thought it would be dominated by Headquarters' interests and thus would fail to fully consider their unique needs. Overcoming this misperception required an internal marketing campaign. The intranet was rebranded, from "iSeek" to "The UN Intranet-iSeek," to reinforce the idea that it was the official platform of the entire organization. The team also abandoned its distinct logo and adopted the UN emblem instead, in an effort to communicate its motto: "One intranet for ONE UN worldwide."

The lesson learned: marketing matters, even for an internal project.

## Working Toward Unification

Armed with a modern, redesigned platform, the iSeek team could now tackle a longstanding challenge: how to convince departments that had abandoned iSeek for their own intranets to come back. To bolster the case, the team used global survey data to show that staff members in these departments were very interested in gaining access to iSeek.

The team then worked to gain allies, one department at a time, starting with those most ready to join; it left the highest peaks to tackle later, once it had accumulated some buy-in.

Convincing the Department of Political Affairs, with its many field missions, to integrate into iSeek in 2018 was a milestone. This process involved a thorough analysis of the department's existing intranets and extensive consultations with the communications and IT professionals working in remote locations. The iSeek team then took their requirements (security alerts, social media widgets, customized homepages, etc.) and created a dozen "mission" templates. It then presented the templates to mission staff members, who selected their favorite.

This victory provided a proof of concept, which opened the doors for many other field offices to follow suit. From there, the team was able to persuade Peacekeeping—the first defector—to rejoin in 2019.

## A Flexible, Global Platform

With all that going for the team, the only thing left to reach the final frontier of universal adoption was to bring the unconvinced on board. The team stood firm that these groups would need to adopt the iSeek template look and feel, but offered flexibility in the content types that they could serve. That's where the Drupal CMS proved to be pivotal. It enabled the platform to provide a new mix of content, relevant to all staff, everywhere, letting global content stand alongside content that would be of local interest only. This meant that stories, features, announcements, events, and many navigational elements could be customized by location.

To support that model, the small iSeek team—six people based at headquarters—manages a global network of content managers called *Focal Points*. The Focal Points are authorized to manage the site needs for their offices, and the iSeek team supports them by offering training and making sure their content is up to date and adheres to guidelines.

Also pivotal was the iterative approach the team adopted to unify the intranet—rolling out technical and design changes on a monthly basis, rather than waiting for one big redesign. This "launch first, refine later" approach allows iSeek to be improved constantly, and will hopefully prevent it from falling back into the trap it found itself in 2007 when offices began abandoning the platform.

The team periodically collects user feedback, through global surveys and focus groups, usability tests, and interviews. It also uses analytics generated by the CMS and Google Analytics to track user behavior. This data helps the team assess the effectiveness of various content types and internal communication campaigns.

This long, slow march toward intranet reunification was difficult, but worth the effort. The reintegration of iSeek across the UN has reduced fragmentation and saved money. Worldwide

staff members are getting the same messages, so they feel more connected and more united in their purpose. And that benefits everyone.
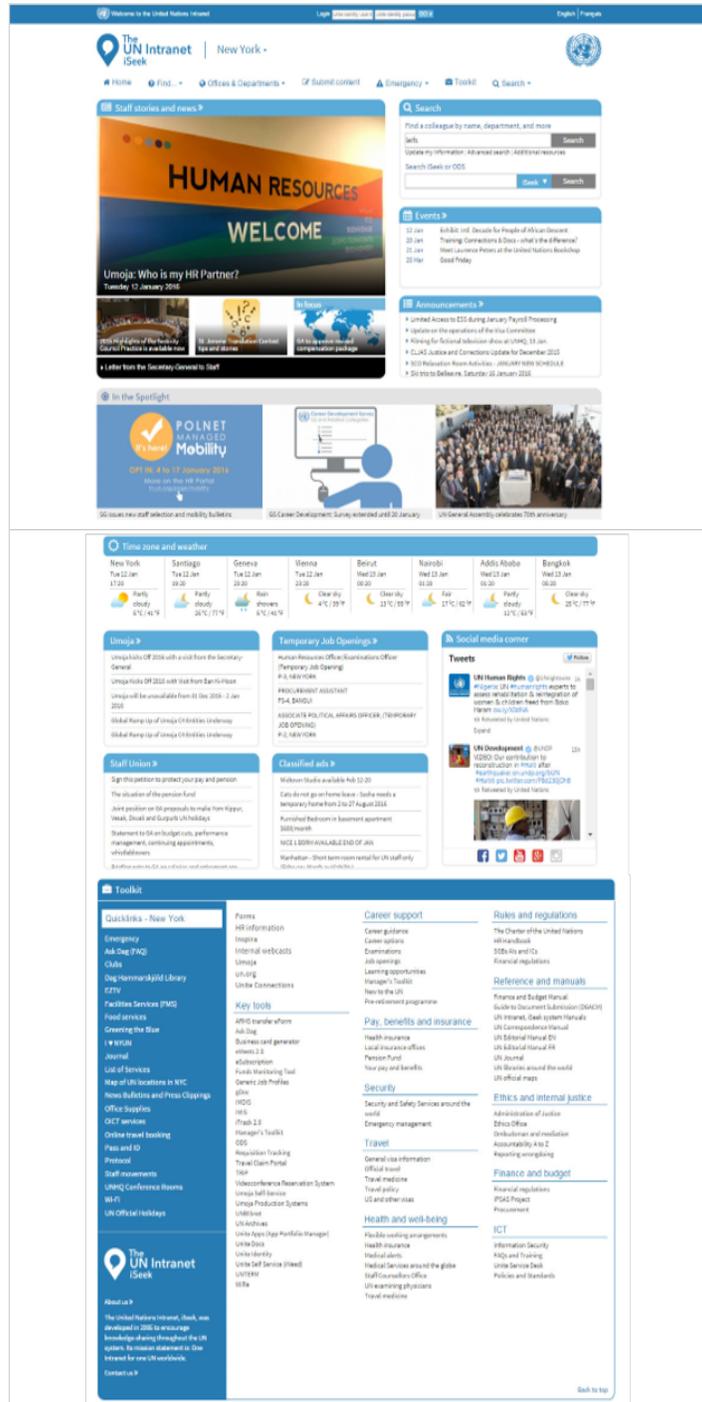


**Image 133. Previous UN Intranet Homepage.** This shows the UN intranet homepage as it was in 2015. *UnitedNations_01_home_version7_2015.png*

# DESIGN REVIEW

## Homepage and Navigation
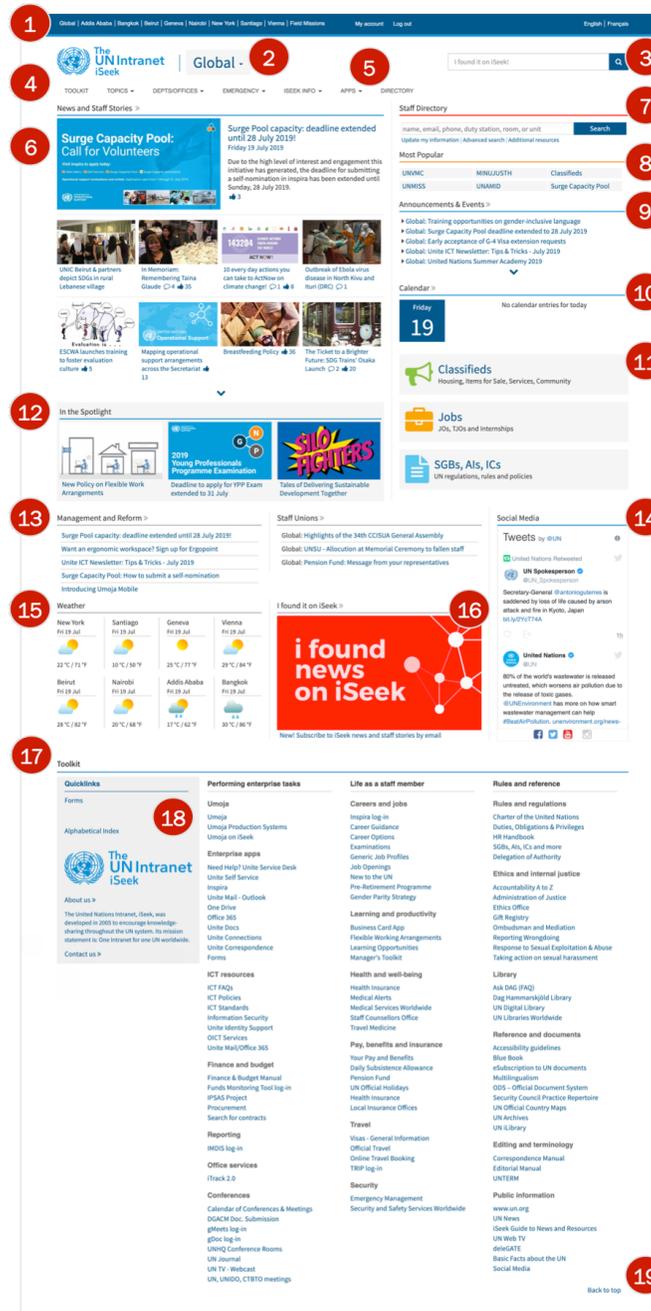


**Image 134. UN Current Intranet Homepage.** iSeek's homepage balances global and local content with the aim of making all staff members feel at home regardless of their work location. *UnitedNations_02_home_live.png*

## Homepage and Navigation
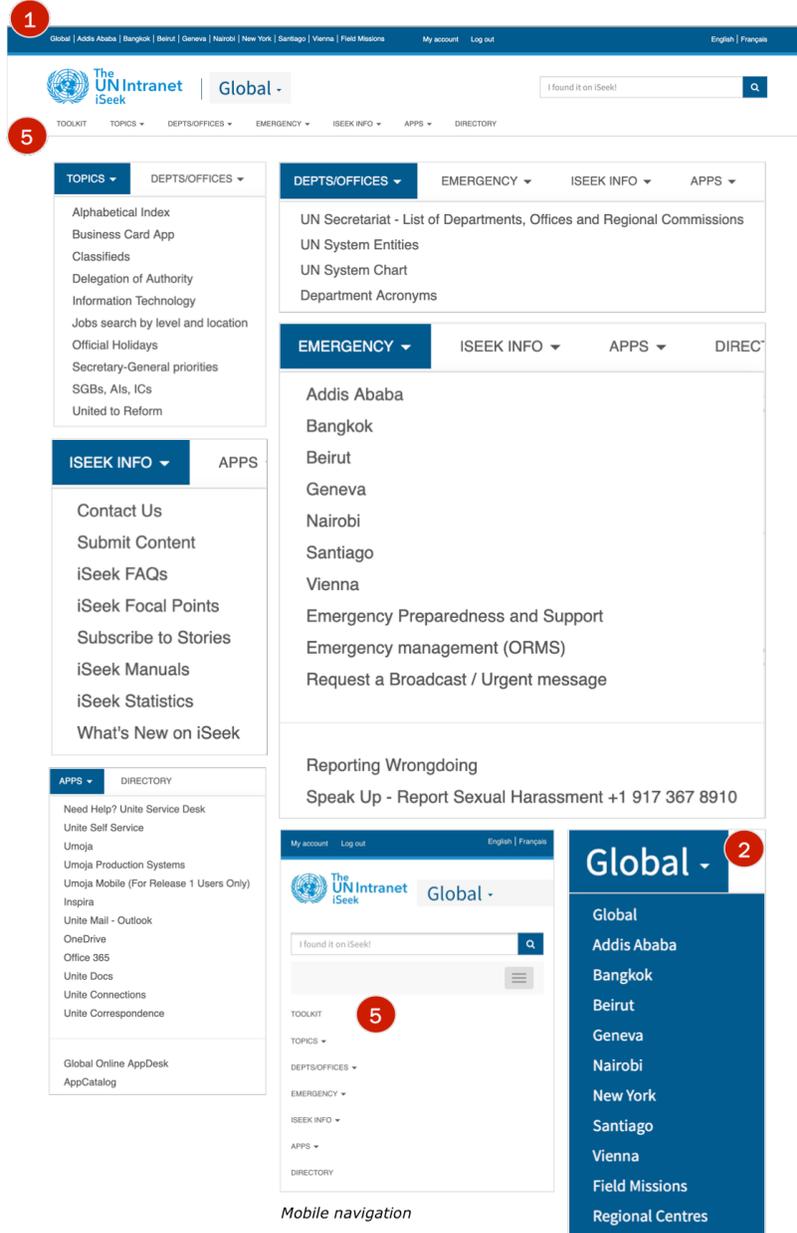


*Mobile navigation*

**Image 135. UN Intranet Homepage and Navigation.** iSeek's drop-down menus, duty station menu, and mobile navigation are fully responsive so users can find exactly what they need on any channel. UnitedNations_03a_toplevelnavigation. png, *UnitedNations_03b_nav_topics.png, UnitedNations_03c_nav_deptsoffices. png, UnitedNations_03d_nav_emergency.png, UnitedNations_03e_nav_iseekinfo. png, UnitedNations_03f_nav_apps.png, UnitedNations_03g_mobile_nav.png, UnitedNations_03h_nav_dutystation*

## Homepage and Navigation Highlights

With its modern fonts, breathable spacing, and clearly defined content slots, iSeek's homepage caters to on-the-go staff, as well as people working at the UN's duty stations. Available in either a global or duty-station specific view, the homepage displays critical news and announcements, provides quick access to frequently used tools, and offers a window to external content via a social media widget.

1. **Utility navigation:** The links in iSeek's utility navigation are available on every page and allow users to quickly access the global intranet and bespoke versions for each of the UN's eight duty stations around the world. Employees can also access their account information, log in, and easily toggle their language preference between English and French (the two languages iSeek supports).

2. **Global drop-down:** The *Global* view of the iSeek homepage contains information relevant for all UN staff, regardless of their location. Employees can also select a specific duty station from the global drop-down menu with options for: Addis Ababa, Bangkok, Beirut, Geneva, Nairobi, New York, Santiago, Vienna, Field Missions, and Regional Centers. Upon selecting a duty station, the homepage seamlessly displays relevant content localized to the selected duty station.

3. **Search bar:** A prominent search bar in a familiar location connects users to key pages and policies they need. iSeek's search is kept relevant and tidy through diligent efforts to preserve the metadata of the content presented, and older content is often unpublished in an effort to continually improve search over time. Results can be refined by duty station, level, and so on. iSeek uses Solr search, which is the approved UN standard search technology.

4. **Toolkit anchor link:** The first link in the main navigation is *Toolkit*, an anchor link that gracefully jumps users down to the highly functional and rightfully named footer.

5. **Main navigation:** To determine which links to place in the main navigation, the iSeek team relied on analytics data and usage trends to understand which site areas employees visit most often. Links to topics, departments and offices, emergency information, iSeek info, workplace apps, and the staff directory won these coveted spots for the *Global* view. However, for localized versions of iSeek, the main navigation is tailored to users' specific needs in each respective duty station.

6. **News and staff stories:** The noticeable placement of news above the fold, the attention-grabbing photography and clear headlines, and the counts and iconography for comments and likes make this news widget quite wonderful.

7. **Staff directory:** Here, staff can find colleagues' contact information (email, phone number, office) by searching for names, locations, or departments.

8. **Most popular:** Links to the most-viewed pages live here, updated daily based on analytics. A subtle grey background appears behind each link to create the visual separation needed for users to easily distinguish between links.

9.  **Announcements and events:** Placed prominently on the homepage, this top iSeek feature showcases UN happenings, holidays, and UN days so staff can stay informed in advance about what's going on at the organization. Events and announcements are also tailored to each duty station and can be managed by Focal Points or empowered staff members with the proper credentials to post events and announcements on behalf of their offices.

10. **Calendar:** The homepage's calendar widget provides a helpful reminder of the date and the events that are scheduled for that day. It also links to the powerful monthly view.

11. **Classifieds, jobs, policies:** User can access three of the most popular iSeek content areas—classifieds, jobs, and policy information—directly from the homepage. The large, blue text link placed on a subtle grey background helps distinguish these helpful features while colorful-yet-informative iconography visually reinforces their meaning.

12. *In the Spotlight:* Whether related to work policies affecting employees, time-sensitive content, or information that ladders up to the Secretary-General's priorities, the *In the Spotlight* area of the homepage sheds light on featured content that is of primary importance to generate staff awareness.

13. **Management and staff content:** iSeek provides a platform not only for management to talk to staff, but also for staff to respond via comments and likes. Individuals can ask questions and expect a response. Conversations are sparked between staff and management that otherwise may not have a place to begin. The intranet is viewed as an essential tool, and management actively promotes iSeek use throughout the organization.

14. **Social media:** Born from a survey that indicated staff wanted access to employee-only information—as well as public-facing content—from within iSeek, the social media widget helps demonstrate how internal communication supports the work that is visible from the outside. Users can thus see the wide variety of themes featured on the UN's Twitter account.

15. **Weather:** A weather widget is displayed on the homepage because UN staff members are present in so many places around the world. The aim of this feature, however, was less to offer the weather forecast for each duty station than to act as a world clock in different time zones—fueling the perception that staff are working "around the clock, all around the world." At the same, it does display the time and temperature—in Fahrenheit and Celsius—to help staff better plan their trips.

16. *I found it on iSeek:* From this linked space on the homepage, users can access a unique communications campaign that strives to raise ongoing awareness about iSeek's global usage statistics and improvements, through a retrospective look back over time. Dating all the way back to 2011, credibility-boosting infographics help employees to see just how far iSeek has come in terms of stories posted, comments received, number of sessions, page views, and more.

17. ***Toolkit:*** The footer *Toolkit* provides easy access to myriad popular and frequently used items, including HR information, salary and benefits, rules and regulations, and travel resources. The *Toolkit* also includes links to major enterprise applications and select digital productivity tools, organized by themes, personalized for each duty station, and available on every page. Some links point to content or tools available on iSeek (such as IT information and UN holidays), while others link to external sources, such as the Dag Hammarskjöld Library, which is a public website.

18. ***Quicklinks:*** As its title suggests, *Quicklinks* offers users fast access to forms, an alphabetical index of pages, a link to *About* content, iSeek's mission statement, and a link to easily get in contact with the team.

19. **Back to top:** As the *Toolkit* anchor link in the main navigation gracefully scrolls users down, the *Back to top* link smoothly scrolls them right back up.

# News Story
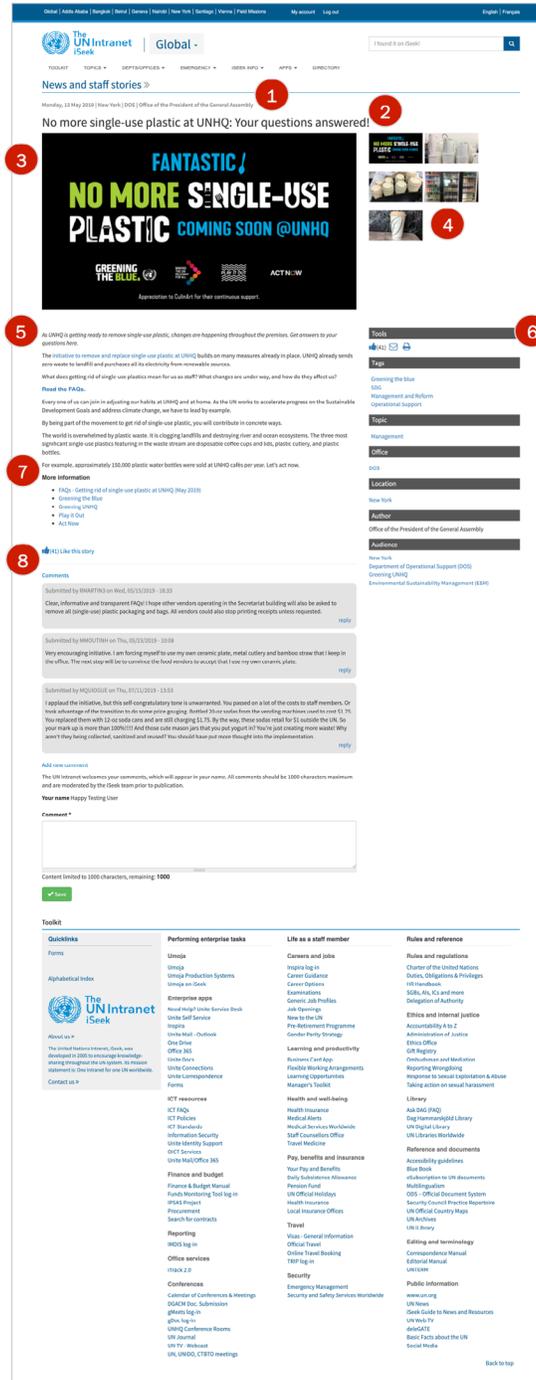


**Image 136. UN Intranet News Story.** News stories on iSeek include prominent, easy-to-grasp headlines, undistracting imagery, proper techniques for length and formatting, and social capabilities, such as likes and comments.
*UnitedNations_04_article_plastic.png*

## News Story Highlights

News stories originate from employees and Focal Points across the organization. This enables iSeek to deliver fresh and interesting daily content that employees truly care about. The team publishes three to five stories per day, which represents over 900 stories per year.

For example, UN staff felt passionately about the issue of plastic pollution and its devastating impact on the environment, particularly when it ends up in oceans. Wanting to free the UN Headquarters from single-use plastics such as plastic bags, straws, and cutlery, staff members began writing opinion pieces on iSeek that advocated for their removal. Other employees chimed in with comments and likes, expressing hope that the organization might eliminate all single-use plastics from campus. Through the power of these news stories and employee engagement, single-use plastic consumption ended at UN Headquarters in 2019.

In another example, Chloe, the cute and friendly English Bulldog that serves as the UN therapy dog in New York, started a conversation about stress in the workplace and became a mascot. All of the news stories involving Chloe shot up to the top of readership. People at the UN clearly like animals, as staff worldwide requested therapy cats, goats, bunnies, and monkeys in response.

1. **Clear display of story attributes:** Users aren't left guessing whether a piece of news is recent or stale, as each story leads with its full publication date displayed in international format. Readers can also immediately see the duty station, office, and author of the story.

2. **Noticeable-yet-informative headlines:** The main headline is prominent and eye-catching, but also clues the reader in to what exactly the story is about.

3. **Static hero image:** Like a perfectly fitting puzzle piece in iSeek's page layout, the main image that coincides with the news takes up enough space to effectively communicate, but not so much that it needlessly decorates the page. Because images are static (rather than contained in a rotating marquee), there's no risk of distraction and readers can focus on getting the information in the text content they seek. This also complies with web accessibility guidelines.

4. **Image gallery:** For stories with multiple images, users can click through a gallery of complementary photos to help visually reinforce the key messages contained in the news.

5. **Article summary and length:** UN employees are busy with the important work of bringing countries together to solve some of the most critical and pressing issues of our time. As such, they don't have a lot of time to devote to reading iSeek news. The inclusion of an italicized summary and a concise-yet-comprehensive writing style allow staff to quickly scan the content, grasp the core points, and stay informed efficiently.

6. **Right rail:** As users scroll down the page, they see commands such as *Like*, *Email*, and *Print*, along with relevancy facets in the form of tags, topics, and audience groups. The office, duty station, and author responsible for publishing the story are also reinforced in the right rail for easy reference. Each link takes users to more news stories that contain the same attributes.

7. **Content formatting:** Formatting techniques such as using chunking, white space, bold keywords and phrases, bullets, blue link text, and clear subheads all lend favorably to the scanning behaviors that users demonstrate when reading online.

8. **Comments and likes:** A critical way of facilitating more two-way communication between employees is the incorporation of social features on iSeek's news articles, events, and announcements. The quantity of likes displays next to the familiar thumbs-up icon, and comments appear below in grey boxes. Each comment includes the employee's name, time, and date of submission, and users can reply to comments or add their own. As the transparent and contextually relevant helper copy states, comments shouldn't exceed 1,000 characters and are moderated by the iSeek team to help deter controversial or inappropriate discussions. Comments prove to be a useful way to engage readers and capture feedback about how to improve iSeek and the UN as a whole. The iSeek team tracks engagement with likes and comments, and has seen a steady increase each year. Many departments even look at the number of likes and comments on their news stories and wish there were more.

## Submit Content Guidelines
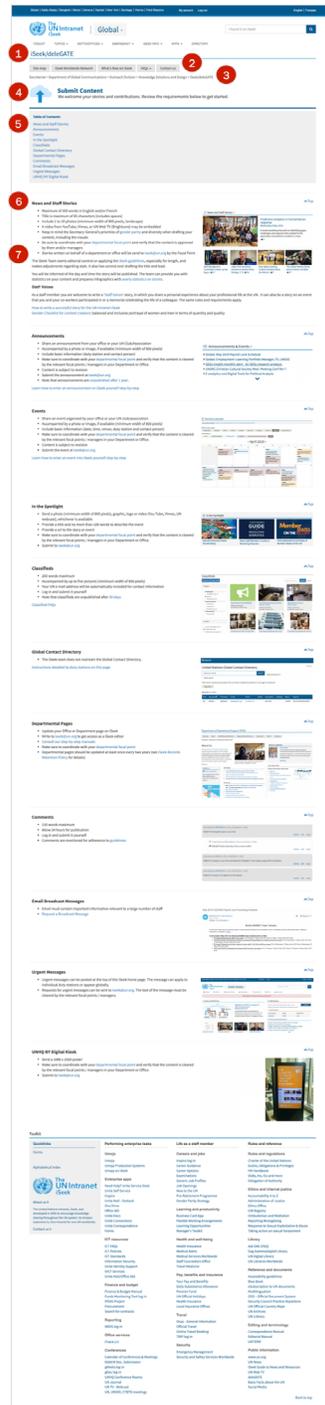


**Image 137. UN Intranet Content Submission Guidelines.** Clear guidelines for submitting content are available to staff members to ensure content meets iSeek's quality parameters and publication standards.
*UnitedNations_05_submitcontent.png*

## Submit Content Highlights

The *Submit Content* page on iSeek takes all of the guesswork and intimidation out of the distributed content creation and contribution process. This simultaneously helps UN employees feel welcome and empowered to contribute content, while the clear limits on length, the process requirements, and the blatant for how to unpublish work to preserve the integrity and relevancy of iSeek's content.

1.  **Page headline:** The blue headline is large enough to stand out and indicates exactly which page the user is currently on, helping to avoid any confusion among potential contributors.

2.  **Section-specific navigation:** Contained in grey tab-like elements, the secondary navigation links to content that's directly related to posting content to iSeek, including a sitemap; the network of Focal Points, contributors, and team members; new iSeek features; frequently asked questions; and an online form to contact the iSeek team directly if questions arise.

3.  **Breadcrumb:** Having the breadcrumb at the top of the page helps users understand how the site is organized and the paths they can take to find what they need. The page title exactly matches what is shown in the last position in the breadcrumb, which is favorable—and a breadcrumb best practice.

4.  **Purpose-driven page statement:** New users may not understand what's behind terms such as "Requirements for posting." Because of this, using plainer language, such as *Submit Content* reinforces the page's objective and communicates exactly what users will find and what they should do next.

5.  **Table of contents:** The table of contents recaps each type of content a user can submit to iSeek. Clicking on a content type anchor link from the table of contents takes the user down to the corresponding set of submission requirements. In keeping with best practices for anchor links, the title for the table of contents prominently displays at the top, is visually distinct from the rest of the page (as it is contained in a grey box), and each blue link truly looks like a link. As an added bonus, each of the link labels matches flawlessly to the content-type headline that appears in the corresponding section below.

6.  **Content types:** Naming conventions for content types are clear and straightforward, making it easy to distinguish them from one another. From their names alone, contributors can envision what the content names stand for, even if they've never actually seen that type of content. An example of each content type in use on iSeek also helps to demonstrate what it actually looks like.

7.  **Submission guidelines:** Each set of submission guidelines provides the exact purpose of the content type, and its word/character limits and image/multimedia requirements. The guidelines also include process touch points for each submission, so that contributors know exactly what to do at each step along the way. Links to

guidelines, how-to pages, step-by-step tutorials, and checklists within each content type also help to ensure that contributors can effectively self-serve and get answers to their questions. A convenient *Back to top* link scrolls users back up to the top of the page so they can revisit the table of contents.

# Department Homepage



**Image 138. UN Intranet Department Homepage.** Department-specific homepages provide context and information for staff members within the department as well as those working outside of it.
*UnitedNations_06_department_live.png*

## Department Homepage Highlights

Because content ownership is distributed on iSeek, department pages are kept tidy and organized through embedded Focal Points. Each year, the amount of content submitted to iSeek from departments increases. As managers and leaders recognize the benefit of reaching staff through iSeek, most have adopted departmental homepages as an integral part of their own department-focused communication strategies.

1. **Department name as H1:** A prominent H1 page title that leads with the full department name, followed by the department's acronym, helps users understand exactly which page they are on and how people typically refer to the department. In an organization as large and cross functional as the UN, these extra details help to maintain clarity and alignment regarding department names and functions.

2. **Department-specific secondary navigation:** Contained in grey tab-like elements, the secondary navigation links to content that's directly related to the department. A sitemap, office locations, topics of interest, information about management reform, a suggestion box for staff, and department newsletters can all be found here. Arrows indicate which menu items have drop-downs containing additional subcategories.

3. **Vision and mission:** The department's vision statement is located at the top of the page, and appears in slightly larger text so that users can immediately see what this department aspires to achieve. A bulleted list containing links to the department's mission statement, annual priorities, and a UN System org chart translated into six languages helps staff members quickly get to know the area. A mini-image carousel allows users to freely peruse a series of featured content recently published by or of importance to the department.

4. **Leader bio:** Offset in a subtle grey box, with a title that directly corresponds to the department's name, staff members can immediately find a biography about the department's leader (under-secretary). An adjacent link to *Read more* is also available for employees who want more information on the department head.

5. **About the department:** The *What We Do* section outlines what the department does, including the functions of its various subdivisions and links to their own iSeek pages, websites, and Facebook and Twitter accounts. Links under the subhead for the office of the Under-Secretary General direct users to committees and services, awards, and content about UN staff day.

6. **Consistent look and placement of widgets:** Department-specific news feeds into department homepages so that relevant information can be disseminated accurately. *Quicklinks* and *In the Spotlight* widgets on the department homepage are consistent with their look and location on the main iSeek homepage. Reliable look and feel and placement of widgets across pages lowers the overall interaction cost of the intranet as users always know exactly where to look to find specific information.

## Directory



**Image 139. UN Intranet Directory.** iSeek's global contact directory makes it quick and easy to find a colleague's email address, phone number, duty station, and more. *UnitedNations_07_directory.png*

## Directory Highlights

The employee directory is iSeek's most-used feature. It relies on a contacts database in which staff can find email and phone contact information for colleagues by searching by name, location, or department. Employees are sure to find who they're looking for given the tool's ability to execute an advanced search or exact search, and filters that enable search by duty station.

1. **Search area:** Users begin their colleague searches from iSeek's homepage where results appear in a streamlined overlay window. The user's query is passed through to the results overlay, where it is contained in an eye-catching search field. Staff can perform an exact search to find a person who matches exactly what they entered, or an advanced search adding additional parameters to narrow the search scope.

2. **Close:** An "X" icon closes the overlay, yet iSeek doesn't just assume that users will know what the "X" icon does. Following best practice, the overlay includes the word *Close* in close proximity to the "X" icon to reaffirm what clicking it will do.

3. **Filters:** Because many large organizations have employees with the same or similar names, filters by duty station allow UN staff to find colleagues at specific locations. Users can sharpen their search by choosing a duty station with the simple click of a filter button labeled with the city (or by clicking again to toggle to deselect).

4. **People results:** A noticeable results count appears along with the results, which contain the contacts' titles, last names, first names, email addresses, phone numbers, mobile numbers, duty stations, buildings, rooms, and organizational units. This provides everything a colleague needs from an employee directory. And the ability to sort alphabetically by last name and a clear pagination element make this results set really stand out.

5. **Update information:** Who hasn't searched for themselves on a company directory or search engine? If staff members notice a discrepancy in their listing, iSeek directs them to the office in charge of modifying their personal information through a convenient *Update my information* link. Helpful resources are also available if users run into roadblocks.

## Search Results



**Image 140. UN Intranet Search Results.** Search results on iSeek include sophisticated sorting and filtering mechanisms and a clean, simple page design.
*UnitedNations_08_searchresults.png*

## Search Results Highlights

iSeek uses Solr, the approved standard for search technology at the UN. Search results and filters depend on content metadata. In most cases, iSeek uses a combination of faceting and keyword searching, and presents filters for all normalized metadata fields whenever possible. Over time, search functionality has been enhanced, allowing for more refined results by duty station, level, etc. The team has been working on the next step to improve search, which is to offer preferred results from curated terms to help staff go directly to the most relevant pages. Unpublishing older content is also part of the efforts to improve search over time and to avoid crowding the results with old stories.

1. **Search area:** A prominent search bar lives in the header so users can search from any page on iSeek. When they click of the search button, results display on this uncluttered page template. The query is maintained and passed through to the results page, where users can then search for files, forms, and documents by selecting the appropriate checkbox underneath the search field.

2. **Sorting and refinements:** Users can sort search results by relevance, from oldest to newest, and from newest to oldest. They can also refine results through various facets—such as announcements and events, news articles, pages, departments, and duty stations—and remove search refinements with a simple click. A noticeable results count helps users understand how many results the set contains.

3. **Results:** Each result listing prominently features a clearly linked page title, which matches the H1 on the page. Also contained in each result listing is the content type, which matches perfectly with the refinements above; the date of publication; and the duty station or department to which the piece or page belongs.

4. **Pagination:** The consistent pagination element matches the refinements design and closely mirrors the design of this component across other iSeek pages.

# AppCatalog
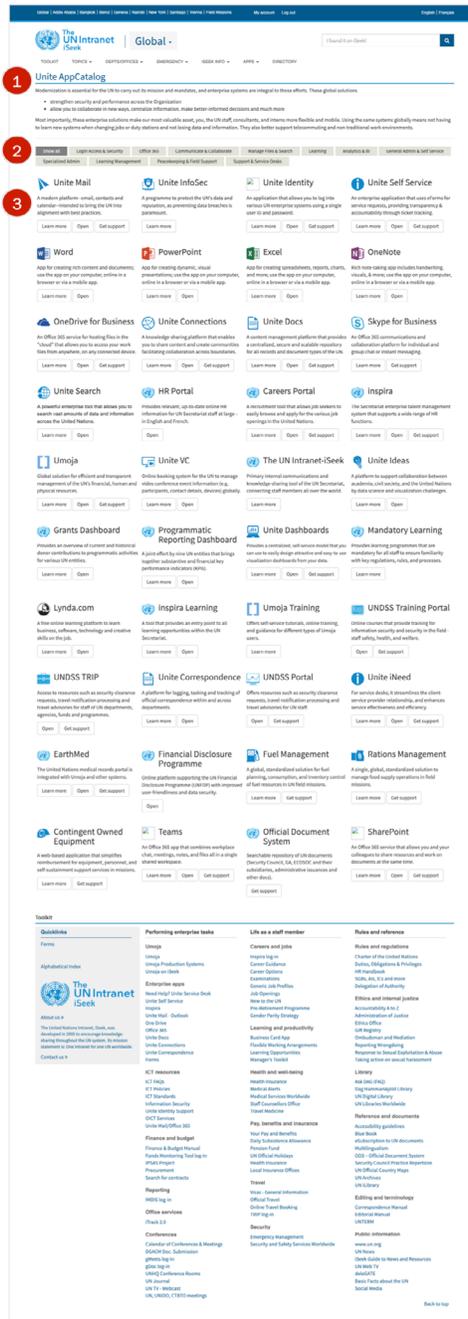


**Image 141. UN Intranet AppCatalog.** iSeek's *Unite AppCatalog* displays an extensive inventory of all the digital applications used by the UN. Beyond the links to these resources, it also directs users to help, training, and support. *UnitedNations_09_appcatalog.png*

**Image 142. UN Intranet Learn More.** *Learn More* buttons take users to a designated page for each digital application where they find a brief introduction to the software and its features, user guides, the latest tips and tricks, training opportunities, and how to get support. *UnitedNations_10_unitemail.png*

## AppCatalog Highlights

Recently created to help staff move toward a single set of shared tools, facilitate increased productivity, and support collaboration, the *Unite AppCatalog* shows the full suite of digital applications available to UN staff. These global solutions strengthen security and performance across the organization and allow employees to collaborate in new ways, centralize information, make better-informed decisions, and much more. Using the same systems across the UN means that staff members do not have to learn new systems or sacrifice their data and information when changing jobs or duty stations. These tools also better support telecommuting and nontraditional work environments.

1. **Page title and copy:** A straightforward page title and introductory body copy lets UN employees know exactly what the *AppCatalog* does and why these tools are so important to their work.

2. **Filters:** Consistent with the filter presentation and functionality in other areas of iSeek, the *AppCatalog* filters help users narrow the set of application results to a specific job function or branded suite of tools.

3. **Application spaces:** For each application, such as Microsoft Outlook, there is an icon, a clear description of the software and its purpose, a link that opens the application, links to how-to guides, training opportunities, and user support hosted on iSeek.

## Jobs



**Image 143. UN Intranet Jobs.** A searchable database of all available jobs is fully integrated into iSeek so staff members can find positions at other UN offices.
*UnitedNations_11_jobs.png*

## Jobs Highlights

iSeek integrates a jobs feed from another UN enterprise application that supports talent management and training. Relevancy is achieved for the job search application by expiring old content automatically and offering both keyword searching and powerful faceting.

1. **Jobs introduction:** Users see the same bright yellow briefcase icon here, which is reminiscent of its use on the homepage to represent jobs. These consistent threads signify users are in the right place if they are looking for a new job. Brief helper copy leads users to search by keywords, duty stations, or the filter categories on the left side of the page. The search box itself contains a helpful reset button that will clear the current query and allow users to start fresh on their quest for a new job.

2. **Filters:** Jobs have six different filter facets, including duty station, temporary job opening (TJO), level, department, network, and job family. Once a specific facet is applied, it shows up under the respective filter. Users can remove the attributes by clicking the "X" icon found on each refinement. As more filters are added or removed, the quantity of results updates accordingly.

3. **Job openings:** Alternating grey and white backgrounds help offset different list items in the job results. Each position includes parameters that exactly match the filters on the left, as well as start dates, end dates, and links to apply for the job.

## Business Card App



**Image 144. UN Intranet Business Card App.** iSeek's business card application allows staff to customize their own business cards, starting with a standard template. *UnitedNations_12_businesscards.png*

## Business Card App Highlights

Before the launch of this application, there was no common template for UN business cards, and every office had its own—inconsistent—card design. This application conveniently generates a print-ready PDF and even stores past versions of business card designs. Employees can print the cards themselves or take the PDF to a print shop.

1. **Purpose-driven page title and visuals:** The page title is straightforward and tells users exactly what they can do with the content they find here. A visual of the front of the finished business cards sets expectations for what the card will look like and helps users understand which areas they need to customize.

2. **Helper copy:** Concise helper copy indicates that users can choose from one of four different designs for the back of their business cards. The text also recommends that users take the print-ready PDF to a print shop, but also provides clear directions for exactly how to print the cards—and which paper to use—if employees prefer to print the cards themselves.

3. **Multilingual and saved cards:** Users can create and print business cards in either French or English. In addition, an anchor link scrolls users down to the bottom of the page where they can see a table with all previous versions of their business card designs so they can print cards that they've previously created seamlessly.

4. **Back-of-card artwork:** Images that showcase the four different card-back options also aid users in making an informed decision about which design to choose.

5. **Saved previous cards:** Employees can also access past versions of their UN business cards. From the table, which is pleasantly offset with alternating blue and white rows, users can download PDFs, edit the designs, or delete them from their account. The card creation date and time make it easy to keep many different versions straight.

## Classifieds



Image 145. UN Intranet Classifieds. One of the most popular iSeek features is *Classifieds*, which allow the UN's global workforce to buy and sell to each other. This is particularly helpful as staff members regularly move to new duty stations. *UnitedNations_13_classifieds.png*

**Image 146. UN Intranet Classifieds Detail Page.** On the *Classifieds* detail pages, users can see a larger image of the item, a brief description, and who to contact if interested. *UnitedNations_14_classifiedad.png*

**Image 147. UN Intranet Classifieds Posting Page.** Rather than having posts vetted before they appear, staff can post directly. They must acknowledge the rules, however, and they are responsible for what they post. *UnitedNations_15_ createclassifiedad.png*

## Classifieds Highlights

iSeek *Classifieds* offer a safe, user-friendly space for employees to sell items or start looking for a new place to live. The platform is safe because users know they will be selling, buying, or renting to and from their peers; it is user-friendly because they can easily find services, housing, or items for sale at their location or another duty station. *Classifieds* is also a powerful magnet for staff from other entities within the UN System, who regularly request individual access to iSeek if their organization doesn't provide it.

1. **Posting and rules:** Evolved from a physical bulletin board to a modern digital version, users can quickly post an ad without training or assistance, with a clear set of rules and FAQs to preserve the integrity of the listings.

2. **Search:** By automatically expiring old posts after 30 days, *Classifieds* maintains its search relevancy. A convenient reset button helps users quickly start a fresh search.

3. **Filters:** UN employees can filter classifieds by item categories and locations. Multiple refinements can be added to better refine the results.

4. **Classified ads:** Each classified ad contains an image, clickable headline, posting date, seller name, description, and location. The grey containers keep the structured content and page grid tidy, allowing users to scan the items available.

# Sports, Games, Clubs



**Image 148. UN Intranet Sports, Games, Clubs.** iSeek includes pages for sports, games, and clubs to build community, promote health and wellness, and provide outlets for employees who share common interests. *UnitedNations_16_club.png*

## Sports, Games, Clubs Highlights

On these pages, which use a consistent iSeek template, employees can see photos from events at the more than 60 participating clubs, as well as understand each group's vision and get to know the instructors or people in charge. Links to social media channels such as Facebook also help employees feel welcome and stay informed about what's going on with the club.

1.  **Photo gallery and vision:** Users can freely scroll through a gallery of photos from club events and happenings. Rather than containing these photos in an animated gallery, which can be quite distracting, the arrow icons make it easy for employees to remain in control of the photo browsing experience. The transparent, consistently placed vision statement communicates the club's purpose and what it aspires to achieve.

2.  **Sponsor information:** Here, employees can find information about the club's leaders and leadership council. Contact information, including a liaison phone number, is also posted. This leadership module has a consistent appearance and placement across iSeek pages.

3.  **Coaches and schedule:** Contained in a grey content slot, employees can get information about when classes are offered, the coaches and instructors who will lead the sessions, the cost, and what the program entails. A table below outlines when various events will take place, who to contact with questions, where the events will be held, and how much participation costs.

# iSeek Statistics
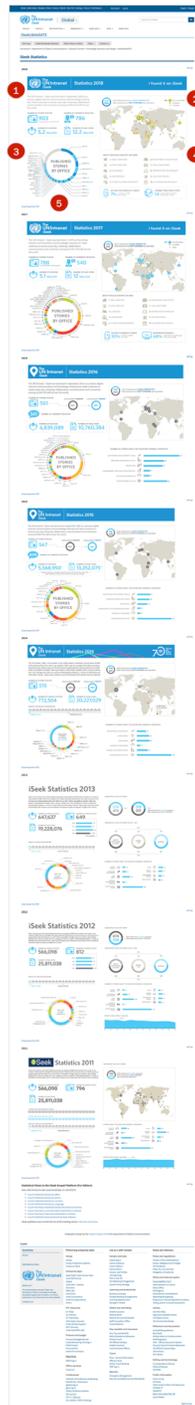


**Image 149. UN Intranet iSeek Statistics.** This feature gives employees a behind-the-scenes look at platform analytics over time and is presented in a visually appealing infographic format. *UnitedNations_17_iseekstatistics.png*

## iSeek Statistics Highlights

Featuring data from as far back as 2011, iSeek Statistics provides a historical look at how intranet content and engagement have evolved over time. Users can see how many stories tout a global focus, versus how many are duty-station specific. Stories published by office and the top-10 most popular content types are also among the trends shown. A companion page, *What's New on iSeek*, offers a historical look at the intranet's evolution, listing detailed design, technological, and content updates monthly since 2013 and historical documents and screenshots since 2004.

1. **Content and engagement metrics:** Users can see the number of stories posted, comments received, sessions, and page views. This area's design includes logical iconography and emphasizes numbers in bold blue typeface.

2. **Map:** A visually appealing map showcases the share of stories with a global perspective and those that focus on a particular duty station. The green, yellow, and grey bubbles represent the number of stories contributed from various office locations.

3. **Pie chart:** A perimeter pie chart shows an even more detailed breakdown of stories published by office location.

4. **Top-10 content:** The most popular content on iSeek shows the top-10 most frequently visited sections, along with the annual increase of users who access iSeek via mobile and tablet. It also details the number of special political missions that joined the iSeek platform in 2018.

5. **Download PDF and back-to-top:** Users can also download a PDF of the year-in-review; because this page is quite long, a helpful back-to-top link scrolls users back up.

# Emergency and Security Alerts



**Image 150. UN Intranet Emergency and Security Alerts.** Emergency information is included in the top menus and emergency messages can be posted at the top of the homepage. An entire page on iSeek outlines, in detail, the processes and protocols during times of crisis. *UnitedNations_18_ORMS.png*

## Emergency and Security Alerts Highlights

Many UN staff members do not spend much time at a desk; instead, they are in the field, engaged in activities such as removing landmines from a soccer field in a former conflict zone, coordinating humanitarian assistance at the site of an earthquake, supporting late-night treaty negotiations on the sidelines of an international conference, or providing security at a refugee camp.

The digital tools on iSeek are central to supporting a mobile workforce, and a big part of that is keeping that workforce safe. The intranet was not originally instituted as an emergency response tool, but when Hurricane Sandy hit in 2012, iSeek played a crucial role in informing staff about closures and developments at HQ. The fact that iSeek also manages the posting of broadcast emails has placed it in a central role to disseminate information. Crisis simulation exercises conducted by security and the business continuity offices have revealed that information disseminated on iSeek guides staff members' emergency-related actions.

1. **About the framework:** Introductory copy outlines what the Organizational Resilience Management System (ORMS) does and how it helps to prepare employees for crisis situations and supports them when they occur.

2. **Links to tools:** Text links to contextually relevant, helpful resources stand out in a light grey box. The bulleted list helps to break up each link with ample space in between each clickable phrase.

3. **Familiar modules:** Prominent contact information is available for the program officer. The officer's name stands out in bolded font, and all appropriate contact methods—including email address, telephone, and cell phone—are listed.

4. **ORMS graphic:** The hub-and-spoke graphic illustrates and visually reinforces all of the system's critical functions and elements.

## iSeek Mobile



**Image 151. UN Intranet Mobile View.** iSeek is fully responsive, and
UN employees can access it on any device from anywhere in the world.
*UnitedNations_19a_mobile_home.png*, *UnitedNations_19b_mobile_article.png*

## iSeek Mobile Highlights

iSeek's responsive design means that it looks good on any device. Without a larger team or budget to support a custom application, this mobile design philosophy is both the most practical approach and the one that iSeek users prefer, according to user research.

1. **Intuitive mobile navigation:** The same navigational elements are available across channels, and users can access the duty station menu via the same drop-down style that's available on desktop. Use of the familiar hamburger menu and a subtle grey background calls attention to the primary mobile navigation.

2. **Strategically placed components:** Important elements—such as search, the staff directory, most popular links, and announcements and events—appear well above the mobile fold so that users can retain access to the homepage areas they use the most.

3. **Single column grid:** Use of a single-column grid ensures that content won't get too squished or become too small to be readable and usable on mobile.

## DESIGN PROCESS AND USABILITY WORK

### An Agile Approach to Design and Development

Since 2015, the iSeek design approach has been iterative.

Two members of the team are primarily responsible for handling user requests and liaising with contributors from offices and departments to ensure that their content looks good, adheres to guidelines, and is regularly updated. And, because they work so closely with iSeek Focal Points, the two team members are well positioned to escalate user issues or suggestions for new features.

The iSeek team uses a ticketing system (Jira) and conducts weekly meetings to communicate with the developer. Together, they set the priorities and establish timelines for improvements. The team's user-centered philosophy is to roll out technical and design changes on a monthly basis, rather than wait for one big redesign.

This "launch first, refine later" approach was a driving factor when the team launched iSeek on Drupal with the previous IA in place. This decision meant that there was no waiting period for an in-depth redesign. Similarly, the team launched the classifieds and jobs pages with basic templates and later refined their functionality and visual design.

### Data-Driven Design

The team supports its design decisions with data gathered through qualitative and quantitative methods. For example, the iSeek team ran regular global surveys in 2015, 2018, and 2019 to assess user satisfaction and identify areas for improvement. They also listen to staff during the frequent (once per day on average) team-led trainings, as well as in communications meetings and other forums. Further, they frequently seek feedback and support from the iSeek Focal Point Network.

In addition to all of these active-listening activities, in 2019 the iSeek Team ran focus groups and usability tests, and conducted interviews. This helped the team learn more about what users want—and what they don't.

Google Analytics is also used to track user behavior, page views, and sessions.

This data, drawn from a variety of sources, cumulatively helps the team assess the effectiveness of various types of content or internal communication campaigns.

### 2019 Research Initiatives

As new staff members from global field locations are brought into the intranet platform, it's especially critical that the team consider their user needs in iSeek's roadmap planning. Thus, as part of the team's continuous design research efforts, it launched several initiatives in 2019 to

gauge perceptions of iSeek, understand current usage, and gather insights about pain points in the UX.

This research included:

- **Current state audit** to identify quick wins and longer-term enhancements to align with intranet best practices.

- **Accessibility audit** to identify key considerations for web and mobile accessibility and serve as a template for ongoing reviews.

- **Google Analytics monitoring** at global and local levels to identify popular content and track mobile usage, geographical reach, performance issues, and other trends.

- **User satisfaction survey,** first launched in 2018 and redeployed in 2019, to gather feedback on key features, as well as the perceived value and utility of iSeek. The 2019 survey of a representative sample of 3,000 staff members revealed the user satisfaction levels: 68% Satisfied or Very Satisfied, 24% Neutral, and 7% Somewhat or Very Dissatisfied.

- **One-on-one interviews with iSeek editors and contributors** around the world who serve as trusted partners and ongoing sources of feedback.

- **One-on-one interviews with global iSeek users in field locations** who offer valuable perspectives on their unique needs and ideas for how to direct future iSeek efforts.

- **Focus groups held at UN Headquarters** in New York allowed the team to perform more detailed task analysis and usability testing, as well as discover the content types users value most.

This 2019 work builds on the major 2014 research effort, which the team undertook to inform its complete site redesign in 2015. That earlier research effort included:

- **Analytics review** to understand usage trends and determine which site areas were visited most often and thus should be prioritized in the revised IA and design.

- **Global survey** with six focus groups to understand the functionality, look, feel, and structure the staff was looking for in a new site design.

- **Interviews with senior officials** from seven UN offices to seek high-level feedback and buy-in.

## Information Architecture

There were four primary IA requirements:

- More information presented above the fold to give better exposure to announcements and events, classifieds, jobs, and essential UN policy, which were among the top features according to usage statistics.

- More exposure to emergency information, the staff directory, and the user's team information in the top menus.

- Footer should appear on every page and be filled with essential links (*Toolkit*) categorized by themes.

- Site should include news feeds to departmental homepages in order to better disseminate information.

## Adoption/Buy-in

In addition to gathering innovative ideas from staff and management about the intranet they would like to see, the findings from the 2015 and 2019 research initiatives lent weight to the iSeek team's vision for the redesigned site as a go-to place for staff information that was user friendly, easy to navigate, and had a more modern look and feel.

## GOVERNANCE

### Ownership

In other organizations, HR or IT may own the intranet, but at the UN, the Department of Global Communications manages it. And, as the name implies, that department comprises communications professionals who are primarily focused on creating awareness of the organization's work and priorities. Because the iSeek team is situated in this environment, it can attract talented internal information specialists, with skills in information management, graphic design, website development, translation, and communications. So, this ownership model

is beneficial because the focus is on effective communication, resulting in a less "corporate" intranet. The challenge with this placement is that the team is located outside of the management department's decision-making process.

| Intranet Team Responsibilities | |
| --- | --- |
| Role | Responsibilities |
| **iSeek Team**<br>An eight-person team (six iSeek members, one section manager, and one developer) based in New York | • Manages the UN intranet, including providing governance and user support<br>• Trains users and iSeek Focal Points on how to use, edit, and write for iSeek<br>• Designs and develops new features and tools<br>• Creates, reviews, and publishes content<br>• Coordinates the iSeek Focal Point network<br>• Manages access and permissions |
| **iSeek Focal Points**<br>a 250-person network | • Coordinate the creation and review of internal communication products (articles, graphics, pages, videos) for their respective UN offices, departments, duty stations, or missions<br>• Submit global stories to the iSeek team for publication and may publish local stories directly<br>• Liaise with iSeek team on user issues and needs<br>• Promote iSeek to their users<br>• Represent their office in iSeek Focal Point meetings<br>• Either personally update their content on iSeek or delegate task to Content Editors<br>• Coordinate training and editorial access for Content Editors (with the iSeek Team) |
| **Page Managers and Contributors** | • Publish content on behalf of their office, staff club, association, etc.<br>• Update information as necessary |

## URL AND ACCESS

| Access Information | |
| --- | --- |
| Item | Status |
| URL | iseek.un.org |
| Default Status | The intranet is set as each user's homepage in Internet Explorer and Microsoft Edge browsers, but not in other browsers (such as Chrome). |
| Remote Access | • Users need to log in with a valid account (assigned by IT) before accessing iSeek content remotely.<br><br>• The iSeek team can also create accounts for individuals. This is mainly used to give access to staff from UN entities outside the secretariat.<br><br>• Remote users can access iSeek via a redirect to the iseek-external.un.org alias. |
| Shared Workstations | Some users access iSeek from shared workstations in UN libraries. Also, visual signage in the UN Headquarters complex displays a slideshow of iSeek stories and other internal communications content. The iSeek application hosts these slideshows on its infrastructure; although the screens support touch, this interface hasn't been leveraged yet. |

## TIMELINE

| Project Milestones | |
| --- | --- |
| Milestone Date | Milestone Description |
| January 1, 2004 | Launch of the UN intranet, iSeek, an initiative of the Deputy-Secretary-General |
| August 29, 2005 | First Redesign |
| April 6, 2006 | Integration of the Global Staff Directory |
| 2007 | The Department of Peacekeeping chooses a different platform, moving away from iSeek. |
| 2011 | Drupal is approved as an official standard, and iSeek and IT prepare business requirements for development of a Drupal platform. This project is abandoned after IT runs out of resources. |
| November 7, 2013 | iSeek is recreated and relaunched on Drupal 7 by its web team, after migration of existing content. |

| | |
|---|---|
| December 2013 | Commenting feature is introduced, first as a pilot due to concerns by the Department of Management. (The iSeek team moderates comments before they are published.) |
| September 2014 | iSeek becomes mobile (responsive) with remote access enabled through password protected log in. |
| June 2014 | Calendar view for events, holidays, and UN Days |
| December 2014 | Preparation begins for a major redesign, drawing on business requirements from the team, global survey, case studies, focus groups, and interviews with top-level managers. |
| June 2014 | Classifieds app launched |
| May 2015 | Business card application launched |
| August 2015 | Major redesign touches on visual design and IA |
| December 2015 | Login credentials now aligned with the UN's enterprise application |
| April 2016 | New redesign, including new fonts and a visual look that emphasizes stories, jobs, announcements, and the most popular content |
| October 2016 | iSeek team begins offering staff training on platform features (iSeek 101). |
| February 2016 | The Department of Social Affairs reintegrates iSeek. |
| November 23, 2016 | The regional office in Beirut integrates iSeek and closes its local intranet. |
| May 2, 2017 | The regional office in Geneva integrates iSeek and closes its local intranet. |
| November 2017 | The regional office in Bangkok integrates iSeek and closes its local intranet. |
| March 2017 | Design changes move the jobs sections higher on the page and provide localization for the spotlight content. |
| July 2017 | iSeek team relaunches its course on how to write stories and provides coaching for participants. |
| December 2017 | With the creation of the *Secretary-General Priorities* pages, the iSeek team takes on more of an advisory role in communication from the Secretary-General. |
| April 2018 | The "I found it on iSeek" communications campaign is launched to raise awareness of the platform's benefits. |
| April 2018 | Jobs search is totally revised to offer a complete feed that contains all jobs available at the UN. |

| May 2018 | The Department of Political Affairs integrates iSeek and closes its local intranet, with integration facilitated by extensive online training for contributors. |
|---|---|
| December 2018 | The regional office in Nairobi integrates iSeek, but also relaunches its separate local intranet catering to entities outside the Secretariat. |
| December 2018 | *Classifieds* template completely rebuilt |
| January 2019 | The Department of Peacekeeping integrates iSeek with a first mission as a pilot. |
| July 1, 2019 | The Department of Peacekeeping integrates iSeek and shuts down its local intranet. |

## CONTENT AND CONTENT CONTRIBUTORS

### Contributors and Contributions

Anyone with intranet login credentials—any staff member, entity, branch, or UN department—can contribute content to iSeek. Users can submit content to the iSeek team via a contact form, send an email (for stories or announcements), or post content themselves using the CMS if they have permission to do so.

People can submit content or post directly in several ways:

- **Submit a story on behalf of UN departments or offices:** Most stories are written by communications professionals or subject matter experts in a UN office. Once written, management and the iSeek Focal Point designated by that unit vet the story. It then goes to the iSeek team for review to ensure that it meets the iSeek editorial requirements. Before being published, stories are edited for style and grammar, and then translated. The unit and the iSeek team work together to agree on the story's publication schedule.

- *Staff Voices* **story:** All staff members can submit posts about personal experiences related to their UN work.

- **Classified ads:** All users can post ads and are responsible for following the rules.

- **Comment:** All users can post comments, which are moderated by the iSeek team.

- **Announcements:** Many contributors are empowered to directly post announcements about events or initiatives using the CMS.

- **Pages:** A smaller, more restricted group of users (verified by their offices) can create pages for their offices and post local content on their respective homepages, such as stories or announcements with a local audience.

A network of more than 250 Focal Points supports contributors from locations across the globe. Focal Points are either communication specialists inside departments or staff members designated by their entity to perform this function in addition to their regular duties.

While most intranet contributions are submitted at the initiative of an office, iSeek team members also constantly monitor the activities/news/work the UN is doing and sometimes ask for contributions on a specific topic or issue.

## Content Management

The iSeek team manages articles via an editorial calendar. Once a submission is received, the calendar manager and editors vet the content for accuracy and rules compliance, edit and translate it, and give it a spot in the calendar.

The editorial calendar is used to manage global articles—which appear on every local iteration of iSeek—as well as local articles that are managed by local teams in different departments or duty stations and that appear only on their iteration of iSeek. This allows for greater flexibility and helps increase the feeling of belonging for sub-entities whose staff can read global articles as well as articles that concern only their duty station/entity.

Other types of content are managed according to type:

- **Events and announcements** can be managed either by Focal Points or by staff members who have permission to post these on behalf of their entity.
- **Classified ads**, a popular iSeek feature, are posted by individuals, including staff from other entities that have requested an account.

## Training

"Write for iSeek" training sessions are offered regularly to encourage staff members to contribute pieces/articles/stories so that they can share their work with colleagues around the world. By mid-2019, 24 training sessions had been organized and 219 staff members had been trained.

In addition to the writing sessions, training sessions are offered several times a week to teach users how to manage local pages and content. These are aimed at staff members, Focal Points, contributors, and page managers who manage the content on their pages.

So far, approximately 2,000 staff members have been trained to perform various activities on iSeek.

## Maintaining Quality

As iSeek's popularity has increased over the years, staff member content submissions have also increased—though this content does not always fit the quality parameters. To address this, rules and guidelines are offered to staff members to help improve submission quality, and iSeek team

members are always available to give advice (in person, by phone, or email) to those who want to write for iSeek. Rather than turn down contributions, the team tries to encourage contributors to improve their text. This approach helps foster the feeling that everyone belongs to the vast community of UN staff members around the world and iSeek is an inclusive platform.

A comprehensive page on the intranet offers specifics on content requirements. Following is an example of the requirements for story posting:

---

**News and Staff Stories**

- Maximum of 350 words in English and/or French

- Title is maximum of 65 characters (includes spaces)

- Include 1 to 10 photos (minimum width of 800 pixels, landscape)

- A video from YouTube, Vimeo, or UN Web TV (Brightcove) may be embedded

- Keep in mind the Secretary-General's priorities of gender parity and diversity when drafting your content, including the visuals

- Be sure to coordinate with your departmental Focal Point and verify that the content is approved by them and/or managers

- Stories written on behalf of a department or office will be sent to iseek@un.org by the Focal Point

The iSeek Team exerts editorial control on applying the iSeek guidelines, especially for length, and makes adjustments regarding style. It also has control over drafting the title and lead.

You will be informed of the day and time the story will be published. The team can provide you with statistics on your content and prepares infographics with yearly statistics on stories.

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## Culling Content

Because iSeek has kept content, especially stories, since its inception, it has become necessary to establish rules for removing content (that is, deleting or unpublishing it). Unpublishing older content is also part of the effort to improve the search and avoid crowding the search results with old stories. For example, classifieds expire after 30 days, and announcements are unpublished after one year.

**Image 152. UN Intranet Content Guidelines.** This page provides the intranet's founding principles, as well as requirements for iSeek contributors, including details for each type of content and retention policies.
*UnitedNations_20_guidelines.png*

## TECHNOLOGY

| Technology | |
|---|---|
| Category | Technology Used |
| Web Server Hardware and Operating System | iSeek is hosted on an internal Drupal farm, which is managed by the UN's corporate IT department |
| Bug Tracking/Quality Assurance | Jira |
| Design Tools | Adobe Creative Cloud |
| Site Building Tools | Drupal |
| Content Management Tools | Drupal |
| Search | Solr |
| Other Functions | Git for source code control management |

## Replacing Obsolete Technology

Until 2014, iSeek was hosted on a combination of outdated technologies, including Lotus Notes and ASP 1.0. These technologies were out of support and lacked integration. Several previous attempts to update iSeek's infrastructure had all been unsuccessful due to migration process complexity and a lack of dedicated personnel. The redesign process that began in 2014 was successful, in part, due to the dedicated collaboration between the UN corporate IT department, the iSeek editorial team, and the iSeek development team.

Rather than take a waterfall approach, discrete sections of iSeek were migrated in iterative sprints, which allowed for more manageable tasks and shorter development cycles. Successful sprints also demonstrated progress to the integrated project team and to management. By the time the entire iSeek application was fully migrated, the project had an iterative development process in place from which to innovate further as it developed new functionalities and applications.

## MOBILE

iSeek became been available on mobile devices (smartphones, tablets) and any computer browser in 2014—a year before the major redesign. Currently, about 10% of traffic comes from mobile users.

Accessing the intranet remotely was an essential feature for a tool serving an international organization with staff located all around the world. Since iSeek went mobile, all staff members have been able to access it from wherever they are, without being tethered to a local network. This also opened the door for intranet access for employees traveling and telecommuting. In

addition, mobile access impacted content contributions, as it made the ability to post remotely a reality. Editors and contributors can now create and edit content on the go. And they can respond to requests to add new content even more quickly.

Mobile access is not only a convenience and an efficiency for the team, but it also provides a pillar of business continuity in times of crisis or emergency. For example, in an emergency, the iSeek Team can alert staff and update them about developments without having to be in the office.

The goals were to make the mobile version easy to access from anywhere and to ensure that it met the accessibility standards for people with disabilities while featuring all the same tools and information as desktop.

iSeek's responsive design means it looks good on any device. And, without a larger team or budget to support a custom app, this approach is both the most practical and the one that iSeek users prefer; in both focus groups and surveys, most UN staff members told the design team that they did not want to download an app onto their personal devices.

Site analytics show that UN staff members are more likely to access iSeek on a desktop computer at their workstation than on a laptop or phone. But such access is changing steadily, especially as the UN is making a hard pivot to support more flexible working arrangements and telecommuting.

iSeek mobile usage grew 71% in 2018; staff members report using iSeek on laptops and smartphones while traveling and working from home, and during their daily commute.

The team's next step in mobile development is to create "iSeek Lite," a low-bandwidth version of the site that is optimized for staff working in conflict zones or remote areas, where internet is patchy and load speeds are slow. The UN staff that work in these challenging field locations are less likely to be working at a desk and more likely to access iSeek from a mobile device.

## SEARCH

### Filtering

iSeek has several different search applications whose filter mechanisms depend on content metadata. In most cases, the intranet uses a combination of faceting and keyword searching. For example, the classifieds search has multilevel facets for category and location, while the jobs search has six different facets. iSeek search results include filters for all normalized metadata fields whenever possible.

## Search Relevancy

Making sure the search tool returns relevant results is an ongoing challenge on any intranet. On iSeek, search relevancy is maintained through various means, including expiring old content automatically and offering powerful faceting tools along with keyword search, particularly within applications such as jobs and classifieds.

Search relevancy is also being actively improved through a new UI that will provide a more intuitive filtering process.

**Image 153. UN Intranet Mobile Search Results.** The default keyword search results page allows for further refinement by content type, duty station, and more.

*UnitedNations_21_mobile_searchresults.png*

## ROI

### Measuring Success Through Metrics

The UN team relies on some hard numbers and some softer measures to gauge the platform's success.

- **Sessions and page views:** The iSeek team reports the annual number of sessions and page views to managers, and a new target is set each year. The number of page views has increased consistently year after year; it currently stands at 12.2 million views annually.

- **Story submissions:** In addition to collecting site traffic and usage statistics, the iSeek Team also tracks which offices and departments have submitted stories to the intranet, as it considers this a KPI. Each year, the number of offices with story submissions increases as more managers recognize the intranet's value as a critical way to communicate with UN staff. For the iSeek team, the overall goal is to ensure that iSeek represents everyone in the organization.

### Measuring Success Through Engagement

Each year, the amount of iSeek content submitted from UN offices and departments increases. Managers in these offices recognize the benefit of reaching staff through iSeek and have made it part of their internal communication strategies. For example, in 2016, iSeek published 561 stories. By 2018, that number had grown to 903, and it is on track to climb to more than 1,000 stories annually.

iSeek provides a platform not only for management to talk to staff, but also for staff to respond via comments and likes. With iSeek, individuals can ask questions and expect a response. This sparks conversations between staff and management that otherwise may not have had a place to begin.

## LESSONS LEARNED

The iSeek team members have given their lessons learned a lot of thought. They've tried hard to figure out what worked and how to benefit from it, and what didn't and how to learn from it and do better in the future. Among these lessons are the following.

- **Evaluate what "business" you're in.** "The Deputy Secretary-General—the UN's number two—launched the iSeek platform as a vehicle for internal communications, but over time, because of the lack of means and the loss of management engagement, the focus of the team became to manage the intranet. Between then and now, iSeek has come to support more and more staff—over 90% in 2019—and is gaining recognition from the highest levels of all departments. By being at the epicenter of all internal communications

and recognized so by the office of the Secretary-General and management, its staff is in a position to create the assets all departments use to promote the priorities of the UN. This positions the iSeek staff as much more than an intranet support organization, as they should be, given the intranet's role in furthering the mission of the UN."

- **Acknowledge the uniqueness of your organization and work with its limitations.** "The United Nations has a culture of consensus. Combined with the global and multidisciplinary nature of the organization, this means decisions require the involvement of all stakeholders. A good example of this culture in action was around adding commenting and liking features on the intranet. The team considered these tools as critical to facilitating more two-way communication in the organization. And while this had become standard functionality on the web, even for internal tools, it was initially challenging to gain the necessary approval to launch this feature at the UN. Management was concerned that staff would voice grievances or post inappropriate content. So the first step was to establish governance rules for the tools: the iSeek Team would vet comments and they would only be published after they were approved and a three-month trial commenced.

  "The team quickly learned that staff didn't submit anything controversial or inappropriate, and over time very few comments were not approved. Only through this trial was the feature allowed to become permanent, and it has since become a much-used tool. And, while this trial was intended to test the reaction to the tool, it also fostered trust between senior management and the intranet team. With earned trust in place, the intranet team is able to respond more quickly to the needs of users."

- **Engage users where they live.** "As new offices were integrated into iSeek and closed their local intranets, it became apparent that there had to be a balance between global, organization-level stories, and local information. The new Drupal CMS allowed for a combination of local and global stories for each location based on editors' choices. Now each duty station's homepage balances global and local content and provides a window to the outside via social media. The importance of this external news was revealed in a survey in which users expressed that they were not simply interested in internal information and that iSeek—being a portal—should open its scope. Showing social media indicates that internal communication is supporting the work the UN does that is visible from the outside."

- **Expand your reach by responding to unexpected situations.** "Two unfortunate crises have played an important role in iSeek's development and its recognition by staff and management as an important tool: Hurricane Sandy and the earthquake in Haiti. While the intranet was not originally instituted as an emergency response tool, when Hurricane Sandy hit in 2012, iSeek played a key role in informing staff about closures and developments at HQ.

  "With the Drupal content management system, emergency information is included in the top menus and emergency messages can be posted at the top of the homepage. The

fact that iSeek also manages the posting of broadcast emails has placed it in a central role to disseminate information. The importance of these features on iSeek was illustrated during the Haiti earthquake."

- **Haiti earthquake:** In 2010, when a 7.0 magnitude earthquake hit Haiti, the UN lost more than 100 staff in a single moment and the iSeek Team stepped in as an emergency hub. Editors from offices around the world were put to work to honor staff whose lives were lost while serving in a peacekeeping mission.

    The design of the homepage was turned from blue to black and grey, and the team dedicated an important part of its editorial efforts toward researching and drafting obituaries, which were posted daily for more than a month on the intranet.

    This brought people together and reminded staff of the role that their intranet could play in giving them a sense of belonging in the face of tragedy.

## Best Practices

### CONTENT

- **Allow for distributed content ownership.** "Allowing for content autonomy over individual areas helps generate pride and create community amongst contributors. iSeek provides the platform and governance, and then news and stories originate from all over the world, enabling fresh and interesting content to be generated daily."

- **Make it personal.** "Like a standard intranet, iSeek provides tools and systems at users' fingertips, but iSeek's human-centered content provides staff with a sense of meaning and belonging. By featuring a mix of global and local personal stories, along with the accompanying images and videos, the intranet serves to connect people and provide a window into the human aspects of this distributed organization. With some staff working in harsh or extreme environments, the platform unifies staff under a shared mission."

### PERSONALIZATION & CUSTOMIZATION

- **Let users see themselves in the experience.** "People want to see themselves in their intranet. As iSeek integrated more and more offices, it increased the visibility of these offices in the navigation as a way to remind users that they're part of a global organization."

### MANAGEMENT

- **Move from a product-orientation to service-orientation.** "When iSeek first launched, the team was almost entirely responsible for creating and sourcing stories. Now, stories are created and submitted through a more distributed model and iSeek is being used to shift toward having an active role in building awareness, oversight, maintaining guidelines, and providing training and education. The platform has been transformed into more of a two-way communication tool."

- **Stay lean**. "The iSeek team's flat hierarchy and ability to reach out within the UN has enabled it to move fast and innovate."

- **Take risks**. "The manager of the iSeek team displayed this in her office for years: 'Please make mistakes.' It's good advice. If you don't try and fail sometimes, then you have not taken any risks."

## TECHNOLOGY & INTEGRATION

- **Practice iterative development.** "Integrating new features every month and tweaking the design progressively has allowed the team to not have to wait for a big splash to improve the platform."

- **Scale as needed.** "A single intranet in a large organization can only function if it's able to respond to the multiplicity of user needs and serve many purposes. This approach has served the organization well, particularly in response to scaling content localization in its role in publishing official and informal news and acting as a content repository, and also in some of its best features, including: the planning calendar, the business card generator, emergency information dissemination, and the pragmatic service of classified ads."

## SUPPORT & HELP

- **Responsiveness yields trust.** "The iSeek team responds quickly to questions and helps with publishing and translating. They also play a big role in negotiating with constituents when content will appear, especially given sensitive information, priorities of senior management, and multiple time zones."

- **Provide frequent training opportunities.** "If you train editors and users, they then act as ambassadors for the service."

## USERS & STAKEHOLDER INVOLVEMENT

- **Cultivate and maintain an active network.** "iSeek has an active Focal Point network [of content managers] covering all departments, service units, and duty stations. Due to the limitations of a six-person team in a single location managing a global intranet, it's important to leverage Focal Points to become champions across departments and geographies."

# Wellcome Trust

## OVERVIEW

### COMPANY

Wellcome Trust exists to improve health by helping great ideas thrive. The company supports researchers, takes on big health challenges, and campaigns for better science. It helps everyone get involved with science and health research.

**Headquarters:** London, UK

**Company locations:** Wellcome has offices in London and Berlin

**Locations where people use the intranet:** Employees at all Wellcome locations use the intranet.

**Annual revenue:** N/A

### THE INTRANET

**Users:** Trustnet serves just over 1,000 users who are based predominantly in the company's London office. The intranet is used to help employees find out what's happening across this diverse organization. It is also a place where employees can be heard and can contribute to the conversation about how the organization achieves its mission. Trustnet is a tool that helps colleagues connect and get things done.

**Mobile approach:** Responsive web design

**Technology platform:** Drupal

### TEAM

**Product team:** A six-person in-house product team built and manages Trustnet: two developers (one back-end and one front-end), one full-time UX person; and a total of four half-time team members—a UI designer, a delivery manager, a product manager, and an editor.

**Leadership:** Chris Newstead, Head of Internal Communications; Alasdair Cowie-Fraser, Head of Digital; Katie Taylor, Head of UX; Lynsey Smyth, former Head of UX; John Baptiste-Kelly, Product Manager; Alice Berry, Content and Internal Engagement Lead

**Design (Creative Services):** Chloe Luxford, UX Designer; Dana Chan, UX Designer (former team member and key contributor); Eleanor Ratliff, UI Designer (former team member and key contributor); Elizabeth Baird, UI Designer (former team member and key contributor); Fahim Ali, UI Designer; Glenn Walker, UI Designer (former team member and key contributor); Julia Godinho, Delivery Manager (former team member); Kristine Nielsen, Delivery Manager

**Development:** Ewelina Skibinska, Front-End Developer; Annika Clarke, Back-End Developer; Neil Cameron, Back-end Developer (former team member and key contributor)

## INTRANET TEAM



***Team members shown here*** *(left to right): Neil Cameron, Dana Chan, Annika Clarke, John Baptiste-Kelly, Julia Godinho, Eleanor Ratliff, and Ewelina Skibinska.*

## HIGHLIGHTS ABOUT THIS WINNER

Just as Wellcome Trust searches for ideas to improve global health and have a meaningful impact in the world, the company's intranet has a meaningful impact on employees. Trustnet lives up to its name as a platform that users trust to access key pieces of news about the organization's work and to carry out top tasks. This is no coincidence, as the in-house digital team responsible for building this custom intranet has a clear understanding of users' top tasks (lunch menu, people finding, staying informed, meeting rooms, and organizational structure) and the organization's mission. With a distinct focus on users throughout product development—from discovery-style research through to usability testing prototypes and beta-releases—the team develops new features that meet needs and improves on existing features.

- **Top tasks methodology:** Feature development and improvement measurements are driven by top user tasks and an understanding of organizational goals. This team carefully monitors performance in line with established KPIs.

- **Integration with applications:** Employees can achieve key tasks on Trustnet without leaving the intranet. Focusing on one of the site's main goals, provision, the intranet team integrated internal systems such as ServiceNow (automated ticketing), Office 365 (automated events creation in Outlook), and Concept (automated meeting information retrieval). Important tasks—such as booking meeting rooms and gym sessions, and finding directory-style information about colleagues—are done exclusively on the intranet through back-end integration with internal systems. Users benefit from accomplishing these key tasks quickly on a familiar interface.

- **Clean, aesthetically pleasing design:** Content is displayed cleanly by utilizing whitespace, as well as grid and card layouts, making this intranet easy to scan. A controlled, subdued color palette highlights content dividers and interactive elements, making content easy to find and read.

- **Customizable list of shortcuts:** Although content is easy to find on Trustnet, users can still save their most frequent tasks and pages to their *Shortcuts*, promoting efficient intranet use.

- **Responsive design:** The entire intranet is built to be responsive to the needs of users working on the move. All design work on the intranet is specified for five breakpoints— mobile, tablet-portrait, tablet-landscape, small laptop, and large monitor—which makes the intranet accessible to employees regardless of their location or preferred device.

- **High-performing site search:** Trustnet promotes the use of search to surface relevant content to users. Not only does the site search have an effective auto-suggestion feature—which has cut down visits to the search engine results page by 55%—but it also has a *Did you mean* feature, which ensures searches are successful, even when users make typographical errors.

- **Kudos feature:** This feature allows users to celebrate the work of others, while being reminded of Wellcome's key organizational principles. *Kudos* also supports one of the key goals of the design: community.

- **Simplified navigation around key tasks:** The global navigation is simplified into 3 areas: *Groups*, *Org Charts*, and *Working at Wellcome*, with an additional navigation item for *Shortcuts*, making it easy for users to find content.

- **Strong editorial presence and content strategy:** The Trustnet team operates a strong content taxonomy that supports relevant content-tagging for authors; it also regularly audits content, as well as archives and auto-deletes outdated content, which keeps the intranet relevant and up to date.

- **Platform for communication:** Context was a key design goal. This challenged designers to find ways to demonstrate how employees see Wellcome and understand its work across a diverse set of disciplines. News, group pages, and Kudos are just a few ways Trustnet gives employees context.

## BACKGROUND

Wellcome Trust seeks out amazing ideas that improve global health and have a meaningful impact in the world. Its intranet is key to helping its employees map the company's progress toward that mission and to giving all company employees a forum to hear stories from staff about their work and their lives.

The Trustnet project was initiated three-and-a-half years ago and was the first project for the company's newly formed Digital Team. Trustnet replaced an out-of-date, content-heavy intranet that was widely disliked by users. The design was updated two years ago to align the site more closely with a revised Wellcome brand identity and has been improved iteratively since then.

The team has been able to shape the intranet into a product that is uniquely Wellcome and is constantly evolving and responding to the needs of an ambitious, mission-orientated workforce. Trustnet helps to remove the friction of using many systems, giving users more time to do meaningful work. It also contributes to community building, giving Wellcome's employees the sense that everyone is working together toward the same goal.

### Goals

The intranet design explicitly meets the expressed needs of staff and is therefore something they actually love and enjoy using rather than something they endure as a necessary business tool. Trustnet delivers on three core themes: context, community, and provision. The platform's further goal is to deliver on three core users statements:

- *"I have a clear picture of Wellcome, how it fits together, and how we are achieving our vision."*
- *"I am connected to my colleagues, feel valued, appreciated, and heard."*
- *"I have what I need to be impactful in my role."*

## Product aims/delivery



*The Wellcome Trust intranet was designed to deliver results based on three core themes: context, community, and provision.*

## Challenges

Many of the traditional challenges of a traditional intranet were avoided by treating Trustnet as product rather than a project. In doing so, adequate ongoing resources and an emphasis on continual user-led improvement were baked-in from the start. The biggest challenges have been integrating with other systems and the governance issues that predictably emerge when working on cross-department processes and workflows. Often, while the team is able to improve some things for users (especially with regard to the interface) it has been difficult to address underlying—and often more impactful—challenges in the process (as well as ownership of those processes). As much as the team is empowered to own the work of developing and improving the product, far greater benefits are often identified but prove impossible to realize. The hope is that the Wellcome culture will one day better accommodate an organization-wide understanding of user-led design, especially a service-led approach—but this is still very much an ongoing journey.

## The Hub of the Digital Workplace

The aim was for Trustnet to be Wellcome's "operating system": a consistent, familiar interface where employees can get things done. To deliver on that mission, the design team made sure the product integrates with as many internal systems as possible. For example, it has a user-editable shortcuts list, which is the primary way to access HR, Finance, and IT support. The platform also features several other embedded integrations:

- **Meeting rooms:** Users can search for and book available rooms, and arrange catering, equipment, and visitor passes, all through Trustnet. The data for this functionality is synced with the company's internal booking system and replaces a form/email workflow, thus considerably reducing time and effort.

- **Events:** Trustnet events are integrated with Outlook, so when users sign up for events they appear in their calendar, and event updates are pushed out to all attendees automatically. This replaces a manual admin process for event organizers.

- **Gym booking:** Users can book gym appointments via the intranet, rather than using a separate app. This has radically increased gym usage for the organization and replaced a manual admin process.

- **Org charts and personal data:** Trustnet is integrated with the HR system, which provides the data for org charts and personal profiles, and automatically updates any changes to a user's details.

- **Forms and processes:** Trustnet has a purpose-built module that integrates forms with other internal systems to improve and automate workflows and processes. It currently integrates with ServiceNow, Light Blue (a photography booking system), and Filemaker to send requests via API rather than email, and it automatically creates tickets in these systems.

- **Elevator displays:** Trustnet integrates with the elevator displays to keep team location data up to date. It will soon allow authors to cross-publish event information to screens across the building.

# DESIGN REVIEW

## Homepage



**Image 154. Wellcome Trust Intranet Homepage.** The Trustnet homepage is divided into four parts: the latest news feature promoted by the organization, all news (which can be toggled to show only news from the user's selected groups), events, and a noticeboard for more casual employee interactions.
*Wellcome_01_Homepage_live.png*

## Homepage Highlights

One of Wellcome Trust's aims is for the intranet to be a place where employees can find out about and share mission-focused work that is going on in the organization. The homepage is used as a communication tool to let employees know about recent news, work, and events. Although a lot of information is presented on the homepage, the content is prioritized so that news pieces produced by internal communications feature top and center, with further important news and events appearing below. Finally, a noticeboard feature below the fold allows users to post non-work-related messages to peers.

1.  **Simplified navigation:** The global navigation has been pared down to include only essential categories: *Groups*, where employees can read about and follow other teams or staff networks; *Org Charts*, which give an overview of the organizational structure; *Working at Wellcome*, which contains top resources for employees; and *Shortcut*s, which provides quick access to a customizable list of favorites. When new users are onboarded, they start with a standard set of favorites: *Menu*, *Policies Hub* (a link for a SharePoint document), *Useful numbers*, *Wellcome Benefits*, and *Workday*. The navigation options reflect Trustnet's core themes of context, community, and provision.

2.  **News:** Wellcome employees can see all news posted by others at the organization, as well as a feed of the news items from the groups they follow. The ability to tab between two different streams ensures that users can easily see news relevant to their direct interests, but not lose sight of the broader organization news. Callouts on the news articles increases engagement and promotes discussion.

3.  **Events:** The events panel shows upcoming events and a link to take users to the full events page. What's nice about this particular feature is the color-coding and labeling by each event, which indicate whether it is full, nearly full, or whether the user has already signed up for it.

4.  **Noticeboard:** This feature provides a place for more casual non-Wellcome related posts, such as the sale of some old speakers or a recommendation for a good carpenter. This is a nice addition to the intranet, as it ensures that non-work-related messages have a space and don't clutter other important information channels. Its location further down the homepage, however, downplays the feature's relative importance.

**Image 155. Wellcome Trust Intranet Mobile Homepage.** The Trustnet homepage is responsive. For users accessing Trustnet via mobile device, the latest news and events are promoted at the top of the page, the global navigation is collapsed in a hamburger menu icon, and search is still easily accessible through the search icon.

*Wellcome_02_Homepage_Mobile_live.png*

# Meeting Room Finder



Image 156. Wellcome Trust Intranet Meeting Room Finder. The meeting room finder is an intuitive tool that allows users to find available rooms and quickly assess their suitability. *Wellcome_03_Meeting_Room_Booking_live.png*

## Meeting Room Finder Highlights

This meeting room finder tool combines the pleasant experience of browsing a well-designed ecommerce site with the convenience of finding a suitable hotel room on a modern booking site. The card layout for available rooms makes scanning easy and presents a lot of valuable information in one space, without looking cluttered. The option to browse or give exact time and date caters to both types of user search behavior.

1. **Search query filters:** When performing a meeting room search, the search filters remain visible and editable so users can quickly update the results.

2. **Tabbing to explore future days:** Instead of adjusting the days and times to find further availability, users can easily tab between days, saving time and effort.

3. **Availability clearly communicated:** The number and type of rooms are communicated at the top of the search results, as is the user's search criteria.

4. **Visual highlighting of room types:** Employees booking a meeting room at Wellcome don't have to guess what the room looks like or go hunt them down. All information needed about each room is captured in a card. Photographs help employees assess whether a room will be suitable for the decorum of their meeting. Moreover, users can see the room availability throughout the day on the right side of each card, where yellow blocks indicate existing bookings.

# Meeting Room Booking Form



**Image 157. Wellcome Trust Intranet Meeting Room Booking.** Trustnet allows users to book a room, along with catering and equipment, and arrange for visitor badges, all in one well-designed form.
*Wellcome_04_Meeting_Booking_Form_live.png*

**Image 158. Wellcome Trust Intranet Meeting Room Booking (Mobile View).** Users can easily make a meeting room booking via their mobile device.
*Wellcome_05_Meeting_Booking_Form_live_mobile.png*

## Meeting Room Booking Form Highlights

We love a well-designed form! This one from Wellcome Trust takes care of everything employees need when hosting a meeting. Using this form, employees can book a meeting room, request AV equipment or stationery needed for the meeting, request visitor badges for external guests, and even order catering or cafeteria lunch vouchers. No need to email, complete multiple forms, or file any paper documentation! All of this is made possible through integration with internal systems.

1. **Essential information front-loaded:** For employees booking a straightforward internal meeting with no further needs, booking is easy as the important booking information is front-loaded. Personal details are pulled from the HR system, so no manual entry of contact details is required.

2. **Additional requirements:** If users have additional requirements, they can fill in the three sections that follow. The additional sections can be toggled off by selecting *No* at the top of each section for users with a straightforward booking. This allows users to submit the form quickly.

3. **Visual reminder of room availability:** While completing the form, users are reminded of the room number and availability on the target day, which avoids the need to retain such information in their short-term memory. Users can also see the other meetings that are happening around the meeting time they're looking for.

# Profile



**Image 159. Wellcome Trust Intranet Profiles.** Profiles on Trustnet are a place to find all needed information about colleagues.
*Wellcome_06_Personal_profile_live.png*

## Profile Highlights

Forget old, unusable HR directories. Trustnet provides each user with a profile that comes auto-populated with information, some from the company's HR system (name, job title, team, manager info) and some from Active Directory (email, mobile phone, Slack, Skype). This makes finding out about a group owner or news article author easy, and makes finding a specific person easy through a simple Trustnet search. Profiles are comprehensive, encouraging employees to learn more about their colleagues and the organization, in line with one of Wellcome's core themes for Trustnet: community.

1. **Editable area to add skills and description:** Employees can add their own skills and a description of their work to their profile. This helps others understand what they work on and learn about their expertise. The company holds regular drives to encourage users to complete their profiles and, because the intranet is so widely used, employees are motivated to do so.

2. **Contact details:** Contact details are pulled from an internal HR system, so they remain up to date. Users can select their preferred contact method (communicated through the star icon). A Slack integration shows whether users are currently online.

3. **Groups:** Profiles include all of the groups that employees belong to or follow, which communicates their specific interests to others.

4. **Location:** Users manually enter where they sit, which is a useful detail that promotes face-to-face interaction and is important for developing a strong community.

5. **Management:** The profile shows manager and team details, which is helpful for understanding people and their place in the organization. This information is pulled from HR records.

6. **Reporting out-of-date profiles:** Everyone hates an outdated profile. Users can report it if they believe something is inaccurate, allowing the profile owner or the intranet team to rectify the problem. When someone reports an outdated profile, the employee receives an email saying, "This person reported your profile to be out-of-date, can you take a look?

# Search
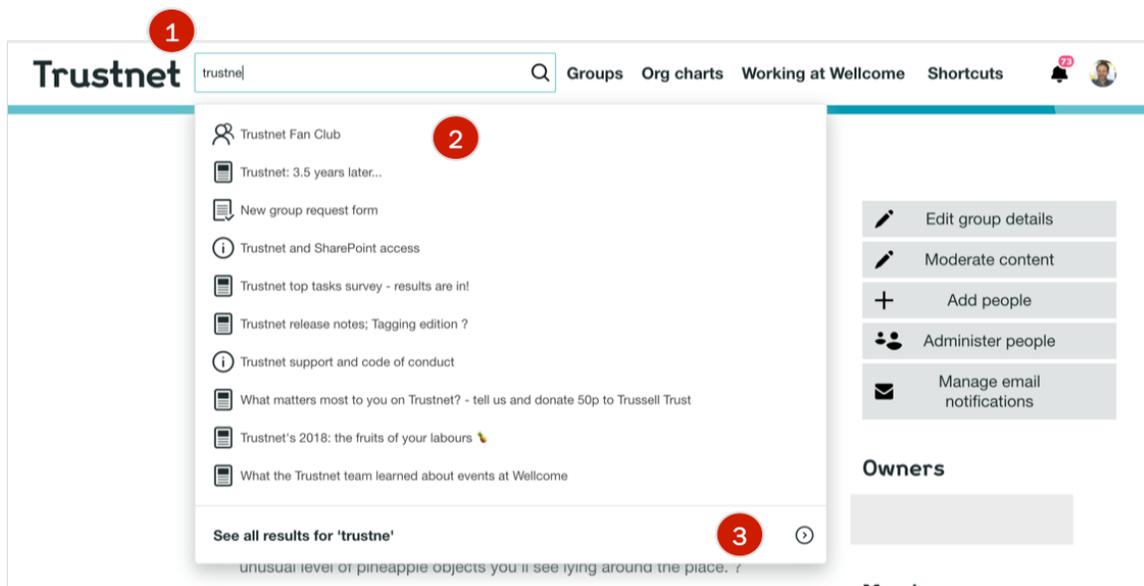


Image 160. Wellcome Trust Intranet Search. Search is the preferred tool for finding relevant content on Trustnet, and the site search has a useful auto-suggestion feature. *Wellcome_07_Search_detail_live.png*

**Image 161. Wellcome Trust Intranet Search Results Page.** Search results are well laid out by content type and present users with useful filter options.
*Wellcome_08_Search_results_live.png*

## Search Highlights

Early on in the design process, the decision was made to keep the site structure as simple as possible and to lean on search to surface content. As a result, a lot of work has been done to ensure high performance for Trustnet's search. The team regularly measures its effectiveness by benchmarking the top-100 terms and reviewing terms that yield no results. For key search terms, where user intent is clear, specific pages or content are boosted to continually improve the answers for commonly asked questions.

The notable auto-suggestion feature has reduced visits to the search engine results page by 55%, making searches more efficient for users, while a *Did you mean* function helps users quickly recover from typographical errors.

1. **Search box:** Located in the left corner near the Trustnet logo, search replaces global navigation as the main device staff members use to access relevant content.

2. **Auto-suggested options:** Relevant auto-suggestions appear as users type. Icons communicate the result type and whether it is a group, page, or form, providing greater information scent.

3. **All results:** If the auto-suggested options aren't right, users can visit the search engine results page to see further search results. The team closely monitors search queries and, when user intent is clear, regularly promotes certain pages or content to continually improve the auto-suggested terms.

4. **Page results:** Search results are well presented with pagination. Groups and the latest news articles are promoted to the top of the search results.

5. **People results:** To avoid mixing people results and page results, people results related to the search term appear in a separate column, making it easy for users to narrow the search and focus on relevant results.

6. **Filters:** The filters down the side communicate how many of each type of result is shown; they can also be used to narrow content if users are looking for content in a particular form.

# Group Pages



**Image 162. Wellcome Trust Intranet Groups Pages.** Group pages are designed to be a place to share work and engage in community discussion. This page from the BAME staff community publicizes BAME events and news and is a place for community-building through the forum and Slack.
*Wellcome_09_BAME_Group_live.png*

## Group Pages Highlights

Group pages—which are navigable from the main navigation—foster a sense of community at Wellcome. Everything about the group's activity is available on the group page, including published articles and organized events. Group content is well structured, and employees can easily find out who to contact and how to get involved.

1. **Presentation:** Static content is presented thoughtfully through the use of short paragraphs, bullets, and bolded words, making content easy to scan and digest. This thoughtful approach is typical on Trustnet as the team provides an editor who helps users shape their content.

2. **Events:** Upcoming group events are automatically displayed on this page.

3. **News:** Articles produced by the group are displayed at the bottom of the page. All content created via groups appears automatically.

4. **Joining a group:** Trustnet makes it easy for employees to join work-related groups. Users can either become a member or follow the group to keep abreast of the group's work by clicking simple buttons on the group pages; no emailing group admins required!

5. **Group owners:** Should users have questions, all owners are listed on the group page, as are the group's members and followers. Maybe someone you know is a member! And if you want to find out more about the owner, it's easy to view the person's profile.

6. **Slack integration:** A link to a Slack channel allows employees to connect with other group members, post queries, and learn more about the group.

7. **Forum:** A forum provides a more formal avenue to share thoughts and feedback with group members. The forum is intended for bite-sized content such as links. Forums are used widely for staff networks (such as BAME or the LGBQT+ Group) but are used less elsewhere.

# Events Calendar



**Image 163. Wellcome Trust Intranet Events Calendar.** The events page lists all events that have been created. The default display is in order of upcoming, but users can filter and sort the results to find particular events that might be more in tune with their interests. *Wellcome_10_All_Events_live.png*

## Events Calendar Highlights

Anyone at Wellcome can create an event to be displayed on Trustnet. Users can view all events in order of upcoming; however, they can also filter and sort events to discover ones that may be of particular interest to them.

1. **Results:** The number of event results is visible at the top of the page.

2. **Sorting:** A sort function is available. If users don't want to view events in order of upcoming, they can also sort by *Recently added*.

3. **Filters:** Rather than throwing all imaginable filters in the left rail, Trustnet presents only three useful filter options: events you're attending, your group's events, or past events.

4. **Ordering of events:** Events are listed in order of upcoming by default and nicely visually demarcated by *Tomorrow, This week,* and so on.

5. **Scannable event card layout:** The events calendar takes on a calendar-style display. Each card contains information to help users to understand the topic, along with who is running the event and where and when it is taking place. A picture provides more context about the event type.

## Events Pages



**Image 164. Wellcome Trust Intranet Event Pages.** Event pages provide a place for users to sign up for events and leave comments for event organizers. The pages also offer information about similar events and event-related news. *Wellcome_11_All_Event_live.png*

## Event Pages Highlights

Event pages are a place for users to read more about an event and sign up, but they are also a place to give feedback to the organizers. Related events in the right sidebar and the footer promote engagement and onward journeys to explore similar content.

1. **Register:** Trustnet events are integrated with Outlook. This means that when users register for an event by clicking the button on the event page, they automatically receive an Outlook calendar event as a reminder. Any event updates are then pushed out to all attendees automatically, replacing a manual admin process for event organizers.

2. **Feedback:** Users can post comments, like, or give Kudos on the event page, helping to drum up interest in organized events, promote a sense of community, and build engagement.

3. **Related content:** Trustnet event pages promote related content, both with the related upcoming events that appear in the right sidebar, and with the related events and news in the footer. This helps encourage onward journeys and increase engagement with Wellcome's content and events.

# Tagging



**Image 165. Wellcome Trust Intranet Tagging.** The team at Wellcome responsible for building and managing the intranet also operates an efficient content taxonomy, which provides useful tags for both content editors and users. Users can search for content using tags on both events and news.
*Wellcome_12_Tags_page_live.png*

## Tagging Highlights

Trustnet content is linked via a consistent, editorially managed content taxonomy. This helps create an overview of work being done in each area of interest and encourages content discovery for users.

1.  **Related tags:** Related tags in the content taxonomy are generated algorithmically and display when users filter content by a particular tag. This helps them discover more content that matches their interests.

2.  **Toggling between news and events:** Users can toggle between looking at tag-related news or events items, rather than receiving a confusing mix of the two.

3.  **Card layout:** News articles and events are laid out left-to-right, top-to-bottom in order of recency. Card layouts encourage browsing, as users can easily scan titles and images to see whether content interests them.

## Kudos
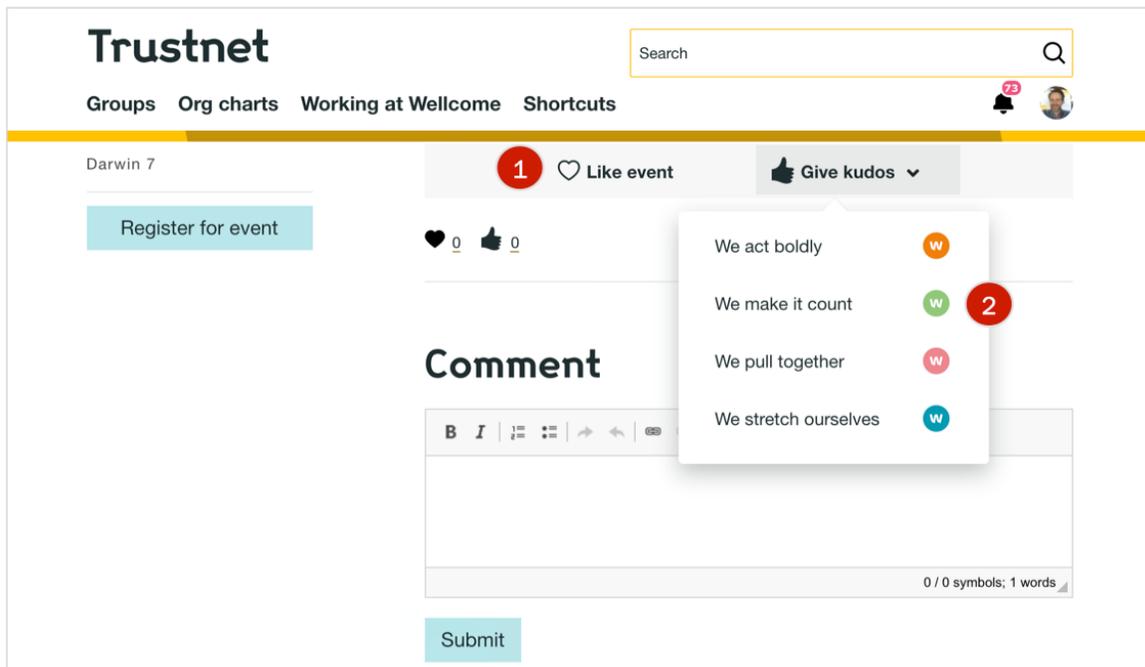


**Image 166. Wellcome Trust Intranet Kudos.** Users can congratulate their colleagues by giving Kudos to an article or event. Giving Kudos involves recognizing an individual or team for their work with respect to Wellcome's principles. *Wellcome_13_Kudos_detail_live.png*

## Kudos Highlights

How do you encourage positive feedback and celebration of colleagues' accomplishments as part of the organization's wider mission? Trustnet has a nice feature developed as a result of user research: employees can give Kudos to a group or individual in response to a news article or an event. Sure, a thumbs-up isn't anything new, but here, users who give the Kudos specify one of the Wellcome's four values principles, keeping the Wellcome ethos at the heart of employee interactions.

1. **Liking and giving Kudos:** When reacting to a colleague's news article or event posting, employees have three options—comment, like, or give Kudos—which fosters a culture of feedback and shows appreciation for others.

2. **Linking Kudos to organizational values:** When employees want to praise someone for their work or their team's work, they can give Kudos and specify a particular Wellcome principle. This helps keep organizational principles current and relevant.

# DESIGN PROCESS AND USABILITY WORK

## A User-Led Design Approach

The Trustnet intranet is the result of a user-led design process. Wellcome has a dedicated team of UX and UI designers and developers who work to constantly improve the product in response to user and organizational needs. This means that the team spends a great deal of time working directly with users. The development process for new features typically lasts one to two months and includes discovery and research, user workshops, wireframing, and prototype building with the entire team before anything moves into development. This gives users a real sense of ownership over the product direction and also means that the team can build the site in a way that responds to very specific organizational needs.

## Designing for User Needs

Employing a variety of research methods helps the Trustnet team understand users' needs and the context of the problem they are trying to solve. The team's methodology plays out over a series of steps, with each one pulling users back into the loop again and again as the design evolves and moves toward a release. Those steps are as follows:

- **Discovery—figuring out what you don't know:** The first step in the team's design research process is discovery, which focuses on identifying the problem. The goal is to move from a general issue, such as "events," toward a deeper and more nuanced understanding of the issues different users might have with events. In this example, the team would to try to frame the problem by considering the perspectives and challenges of event hosts and attendees. Interviews with a broad section of users and contextual inquiries during this phase help team members lock in on specific areas where they can have an impact. They then analyze and condense this work into key insights and distill the work into learnings for the entire team.

- **Competitive analysis:** The findings from the discovery phase are paired with competitive analysis data to determine how other products have remedied the same types of challenges. Most of this analysis leans toward customer-focused digital products, rather than other internal digital tools and systems. On one hand, this is simply a practical matter: internal tools are more difficult to see. But the team is also looking to gain knowledge from the tools it studies and the highest standards and innovation is typically achieved first in customer-facing products.

- **Develop problem statements:** Next, problem statements are generated and the entire team helps to map out potential solutions.

- **Sketching:** The next step involves sketching and ideation to explore possible solutions. This work involves users as much as possible throughout the process so the team can gather feedback and input.

- **Wireframes:** The sketches develop into wireframes through development team input. Then, onto final designs, which are also shown to users so the team can learn from their feedback and iterate the design. The team then turns the static wireframes into testable (clickable) versions that users can beta test before the final release.

Throughout the entire process, the team defines ways to measure impact and usability. When a problem statement is developed, the team tries to define metrics that relate to that specific problem: *What would success look like if this issue was solved?*
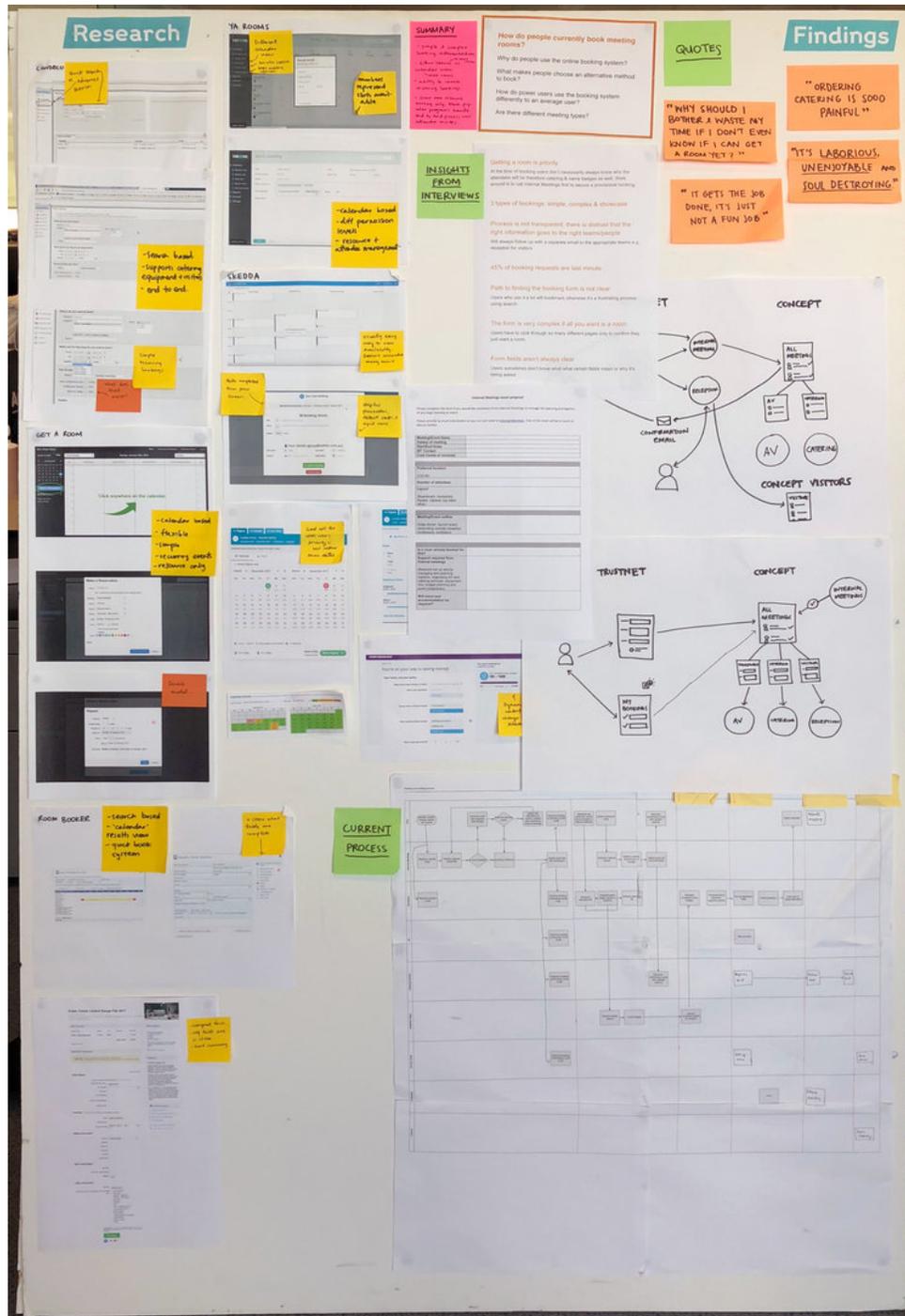
This photo shows one of the team's research boards as it worked through the process of designing meeting room booking. It includes competitive analysis (under "Research") and a condensed summary of user interviews. It also shows sketches of how the meeting room software's integration might work and a process map of how it was working at the time.

## Adoption/Buy-In

The most tangible benefit of a user-led approach is its impact on engagement. Put simply, if you build something people want (and have a role in defining) it is far easier to get them to use it. Trustnet has exceptionally high staff member engagement, due in part to the sense of ownership they feel in the product. Trustnet is at the center of how Wellcome sees itself as an organization and how users understand the work the company does across a diverse set of areas and disciplines. This kind of user engagement is easily quantifiable. Here are some examples:

- 98% of employees visit the site within any two-week period
- One average, users visit 43 pages/week and read eight news articles/week
- 40% of employees have posted an article within the last 12 months

This level of engagement allows the organization to communicate incredibly effectively. Difficult conversations are had out in the open; they are engaged with by senior leadership, and comments and feedback are encouraged.

Trustnet is the primary platform for sharing strategic goals, key events, and project updates for departments across the organization. As such, Trustnet has become organically embedded in organizational processes and communications. Teams, departments, and staff networks can leverage this engagement to build and develop community and share knowledge and insights.

There is also a strong emotional attachment to Trustnet, as demonstrated by the feedback the team regularly receives about how much the product is loved. Recent quotes from a staff survey, for example, include this ebullient praise:

- *"I'm still relatively new and have to say that Trustnet is fantastic, like nothing else I've ever used! [I] Appreciate how content is always being kept fresh and how easy & quick it is to find info."*
- *"It's always a pleasure seeing what's released in each version, the pace of innovation is refreshing."*
- *"I loooooove Trustnet. It's really easy to use. And pretty."*

## GOVERNANCE

### Shared Ownership

Trustnet sits within the Digital Department, which works in partnership with Internal Communication, the platform's primary stakeholders.

The product team is also accountable to a cross-department body that includes members of HR, IT, Finance, and Facilities, but it is autonomous in defining priorities. This cross-department body is responsible for aligning itself with broader organizational needs and for championing

the user in discussions about how and why the product is further developed. This shared ownership structure has been vital to helping empower the team to execute impactful work for the organization.

| Intranet Team Responsibilities | |
|---|---|
| Role | Responsibilities |
| Product Manager | • Define vision and product roadmap<br>• Maintain stakeholder relationships and articulate vision and product roadmap to the organization<br>• Prioritize work and help team understand context and direction of travel |
| Editor | • Drive site engagement<br>• Ensure consistent tone of voice<br>• Help Trustnet meet Internal Communication goals |
| UX Designer | • Understand and articulate user needs<br>• Define the problem the team is solving<br>• Ensure that the product meets user needs |
| UI Designer | • Design a consistent, beautiful, intuitive, and accessible interface |
| Front-end Developer | • Build a consistent, beautiful, intuitive, and accessible interface<br>• Ensure that code is maintainable and performant |
| Back-end Developer | • Build things that meet user needs in a way that is maintainable, elegant, secure, and performant |

## URL AND ACCESS

| Access Information | |
|---|---|
| Item | Status |
| URL | https://trustnet.wellcome.ac.uk/ |
| Default Status | The site is set as the default browser page for Windows users (approximately 70% of users) |
| Remote Access | The site is accessible to employees from anywhere to support the company's flexible working policy |

## TIMELINE

| Project Milestones | |
|---|---|
| Milestone Date | Milestone Description |
| September 2015 | Trustnet 2.0 launch |
| June 2017 | Redesign launch |
| February 2018 | Meeting rooms launch |
| June 2018 | Articles and events redesign launch<br>Kudos and Gym booking functionality launch |
| August 2018 | Slack integration<br>Taxonomy and emojis functionality launch |
| October 2018 | Events launch<br>Office 365 integration |
| January 2019 | Top tasks launch<br>Usability benchmarking |
| March 2019 | Search improvements |
| Overall redesign timeframe: Ongoing | |

## CONTENT AND CONTENT CONTRIBUTORS

### A Culture of Contribution

Given the nature of Trustnet as a channel for internal communication, it has become a default and essential component of the organization's way of working and a place for Wellcome employees to truly understand what the company is doing.

Departments, teams, groups (social and professional), and individuals are encouraged and expected to use the platform to talk about their work, and users are enthusiastic about publishing content. In 2018, for example, 40% of employees posted an article. Trustnet's editor encourages teams or departments with low engagement to contribute more, and is responsible for promoting content to the homepage and ensuring a consistent tone-of-voice for articles. With 1,800 articles and events published each year, Trustnet is a dynamic environment with constantly changing content. This also helps drive engagement, as there are always new things to read and interact with.

## Intranet Content Viewed as a Historical Repository

By default, all news and articles are deleted after 12 months, but content that is particularly interesting or important is kept on the site longer. Beyond that, the intranet team is currently in discussions with the archiving team to find ways to store these articles longer and provide a more granular, detailed history of the organization. The idea behind this effort is that such a repository would provide the ability for staff in 10, 20, 30, or even 100 years to be able look back at why decisions were made and how Wellcome has changed over time.

**Image 167. Wellcome Trust Intranet News Page.** The news pages have the same layout as events and are designed to be readable and meet accessibility guidelines. The page encourages user interaction via likes, Kudos, and commenting, and also propels users to onward journeys via the sidebar and footer. The sidebar displays the week's most important news or events. This screen also highlights the *Shortcuts* feature, which allows users to create quick links to key pages on Trustnet or any other key internal systems.
*Wellcome_14_News_with_shortcuts_live.png*

**Image 168. Wellcome Trust Intranet Projects Page.** Group pages are used to highlight the work that teams are engaged with. These project pages provide links to offsite resources so that users can get more detailed information about the group and team members, and their roles are displayed along with related news and events. *Wellcome_15_Project_page_live.png*

## TECHNOLOGY

| Technology | |
|---|---|
| Category | Technology Used |
| Web Server Hardware and Operating System | Debian Jessie 8<br><br>AWS Instances in the Cloud |
| Bug Tracking/Quality Assurance | Github |
| Design Tools | GA<br><br>Hotjar<br><br>Optimal Works<br><br>Sketch<br><br>InVision<br><br>Adobe CC<br><br>Browser Stack<br><br>Notion |
| Site Building Tools | Drupal/React: Used for both internal and external web projects; allows for consistent ways of working across different product teams and gives the teams enough flexibility to effectively respond to user and organizational needs. |
| Content Management Tools | Drupal |
| Search | Solr |

## MOBILE

All pages and features on the intranet are available on mobile and tablet. The site was built to be responsive to meet the needs of users who work while on the go.

All design work is specified for five breakpoints:

- Mobile
- Tablet
- Desktop-M (1024px)
- Desktop-L (1240px)
- Desktop-XL (1440px)

It was very important that Trustnet support employees working remotely and on mobile devices. The team therefore tested mobile designs and prototypes with users as part of the standard design workflow.

Currently, just under 20% of intranet traffic is from tablets and approximately 5% is from mobile devices. The vast majority of users are in the office, so the primary mobile use cases are for users trying to find more information about people, locations, and the lunch menu.

## SEARCH

Trustnet uses Solr to power its search, as it is highly configurable and has a wide selection of plugins available. This technology helped the team create an effective search tool that allows users to find the things they need, but the team also views search as an ongoing refinement process. It therefore regularly measures search effectiveness by benchmarking the top-100 terms and the terms that yield no results. This process highlights areas that need improvement. One of the ways the team has improved search is to boost specific pages or content for key search terms where user intent is clear; doing so continually improves the answers for commonly asked questions.

The biggest gains in terms of user satisfaction with search have come from adding functionality that suggests popular terms as-you-type. This work reduced visits to the search results page by 55% as content is surfaced within the search field itself. Adding, *Did you mean* functionality has also significantly decreased the no-results that occur with spelling mistakes.

## ROI

### Supporting Core Themes

As stated above, the intranet was built to support three core themes: context, community, and provision. The team measures the success of its work against how well those themes are supported by the platform.

For *context*, the team looks at how effective the product is at communicating what's happening in the organization. It does this by focusing specifically on the number of news articles that are read per month. During July 2019, 30–35 news articles were read per month, per user. This is a 40% year-over-year increase from the same period in 2018, after a similar increase in 2017.

**News Articles Read / User / Month**
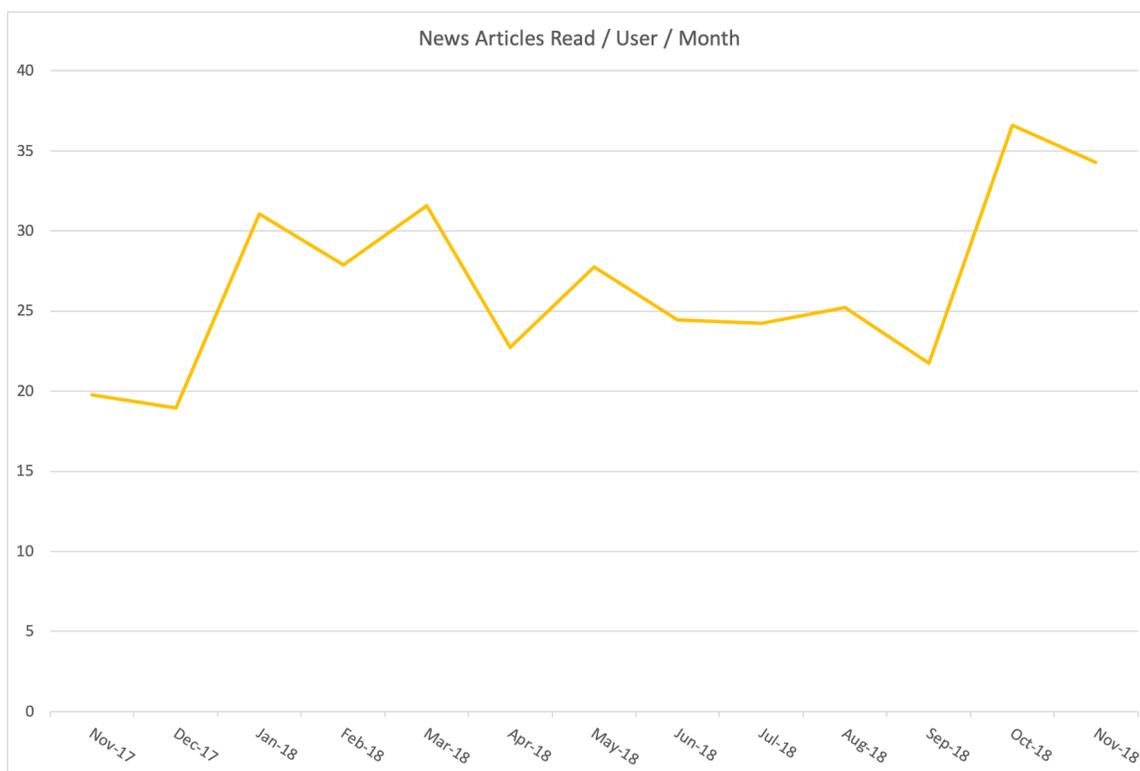
*The Wellcome team measures context success through news page views, which have increased consistently over time.*

For *community*, the team looks at deeper levels of engagement, such as the number of groups that users follow or are members of, and the number of events that have been viewed. Examples of community success include:

- Users gave out a total of 18,070 likes and Kudos in 2018.
- In July 2019, 433 comments were posted.
- Unique page views for events content in 2018 increased by 45%, and time spent on the page increased by 30% in year-over-year measures from 2017 to 2018.

For *provision*, the team looks at stats that measure engagement with the *Working at Wellcome* section, search metrics, and the results of annual usability benchmarking. This helps them understand: *How easy/quick is it for a user to do x?*

- In 2018, the *Working at Wellcome* unique page views increased by 28% and the time spent on the page increased by 80%.
- For search, the average no-results returned were reduced by 55%.
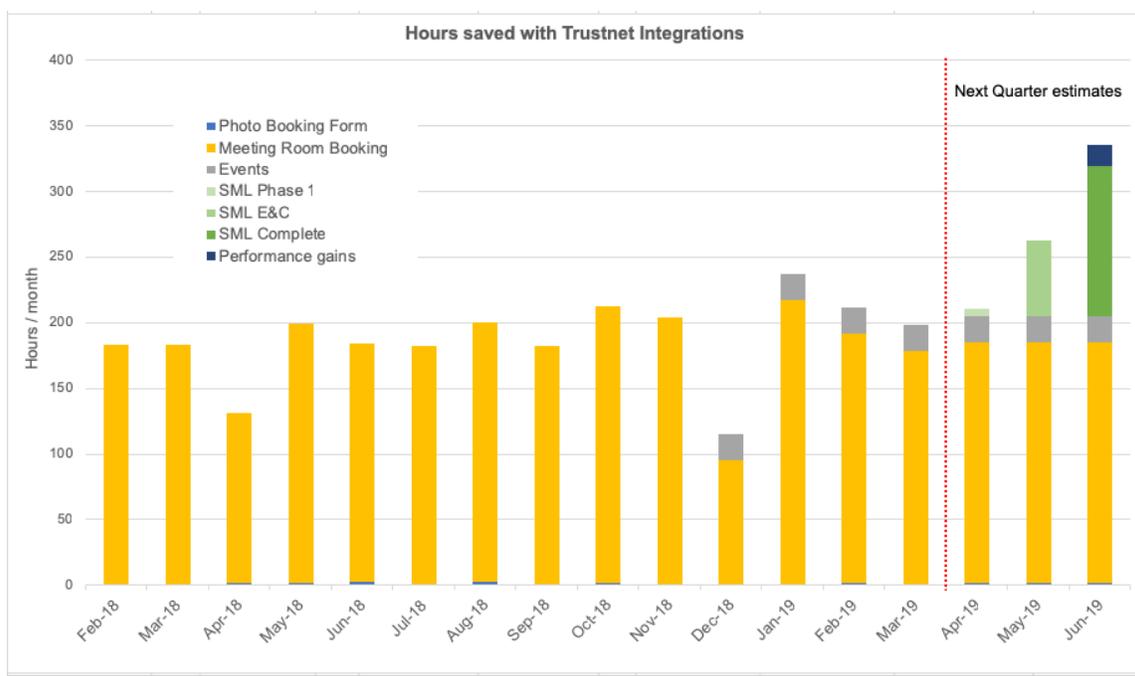
*This graph displays efficiency savings from the team's development by estimating time saved per task and multiplying that by the number of tasks per month.*

## Measuring Impact

Trustnet's success is informed by the product's vision statement and user goals. The product team measures the impact of its work against metrics, which (where possible) act as proxies for the type of outcomes it wants to achieve. These methods include:

- **OKRs:** The Trustnet team uses the Objective and Key Results (OKR) methodology to measure the impact of its work. The team set objectives and determined how to measure them for each quarter, and it communicated these outcomes to the wider organization. They have found that this metrics-based approach helps focus the team and create accountability; it is also a great tool to communicate value.

- **Staff survey:** The team also sees the impact of its work in results from the company's annual staff survey, where improvements in areas related to internal communication can be attributed to improvements in Trustnet. In the most recent staff survey, 92% of employees say they "have a clear understanding of Wellcome's mission" which is due in part to the work of the Trustnet team.

## LESSONS LEARNED

In the build vs. buy debate, Wellcome Trust chose to build—and that decision has paid off handsomely for the organization. Despite the availability of incredibly mature intranet products, there are still compelling arguments for building and maintaining an internal product. And while this is true for internal products in general, it is especially true for intranets. Following are some of what the Wellcome team learned by choosing the road not-often taken in the intranet world.

- **The trade-off for a relatively high upfront cost is engagement.** "When you build a thing people want, they are more likely to use it. This [custom-built product] isn't the aggregated wants of a thousand different organizations; it's the specific, tailored (ever-changing) wants of *your organization*. Rather than being a tool that people have to use it is a tool that helps and enhances an employee's day. On a more fundamental level, the intranet becomes an expression of how much the organization is listening to its employees and is a tangible expression of that dialogue."

- **Momentum feeds on itself.** "Trustnet doesn't release features that don't work, because the team invests so much time listening to and responding to its users. The engagement and the momentum behind that engagement increase year over year as staff experience the value of using the intranet on a daily basis. For example, unique page views for Trustnet have increased 80% in the two years since the redesign, with largely static staff numbers. This provides an incredible platform for change and communication and understanding. It is hard to see how this could be entirely replicated with an off-the-shelf product."

- **The risk is high, but so is the reward.** "The structure of the team, especially around an idea of product (and the Agile methodologies associated with that) create a sense of autonomy and empowerment for the team, which is incredibly motivating, particularly at an organization such as Wellcome. The content strategy, especially around devolving content to everyone, is risky and incredibly difficult to get right, but once in place changes the way an organization communicates with itself and helps create a sense that everyone's voice and contribution is important and valued."

All of these in sum should be considered best practice and worth the upfront investment and risks inherent in building in-house.

# History

# Design Annual Winners Through the Years

## REGIONS AND COUNTRIES REPRESENTED

With three Intranet Design Annual winners this year, the US has made its usual strong showing, with Canada alongside it with three winners as well. Two British winners grace our report this year, and one winner each from Italy and Poland round out the top 10.

| Design Annual 2020 Winners By Country | |
|---|---|
| Country | Number of Winners |
| United States | 3 |
| Canada | 3 |
| United Kingdom | 2 |
| Italy | 1 |
| Poland | 1 |

The world regions and respective percentages of winning organizations across the Intranet Design Annual's history are:

- North America (57%)

- 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.
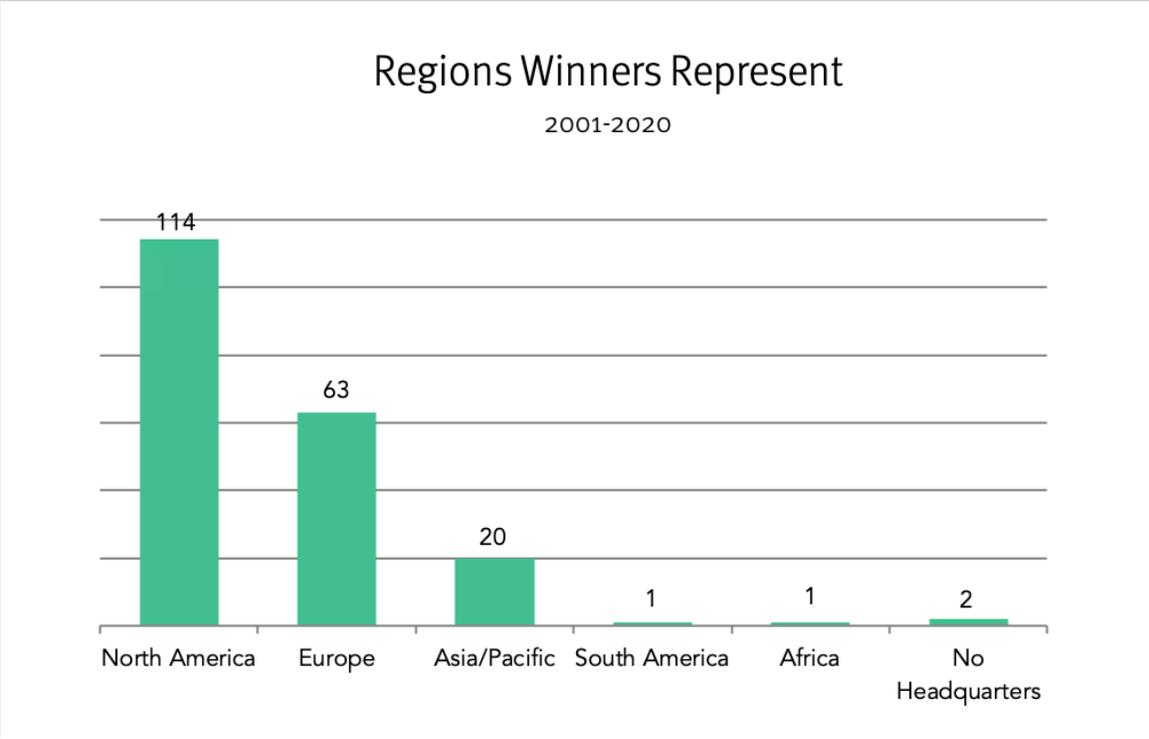
**Regions Winners Represent:** *2001–2020. The world regions and respective percentages of winners across the history of the Design Annual are North America at 114 winners (57%); Europe at 63 winners (31%); Asia/Pacific, including the Middle East, at 20 winners (10%); South America at 1 winner (0.5%); Africa at 1 winner (0.5%); and 2 winners (1%) claiming no official regional headquarters.*

## Countries Winners Represent
### 2001-2020

- Republic of Korea, 1
- Japan, 1
- Saudi Arabia, 2
- India, 1
- New Zealand, 3
- Australia, 10
- Norway, 2
- Portugal, 1
- Latvia, 1
- Iceland, 1
- Denmark, 1
- France, 2
- Poland, 3
- Ireland, 3
- Italy, 4
- The Netherlands, 4
- Switzerland, 5
- Spain, 6
- Sweden, 7
- Germany, 9
- United Kingdom, 14
- Canada, 19
- United States, 95
- United Arab Emirates, 1
- Brazil, 1
- South Africa, 1
- No Headquarters, 2
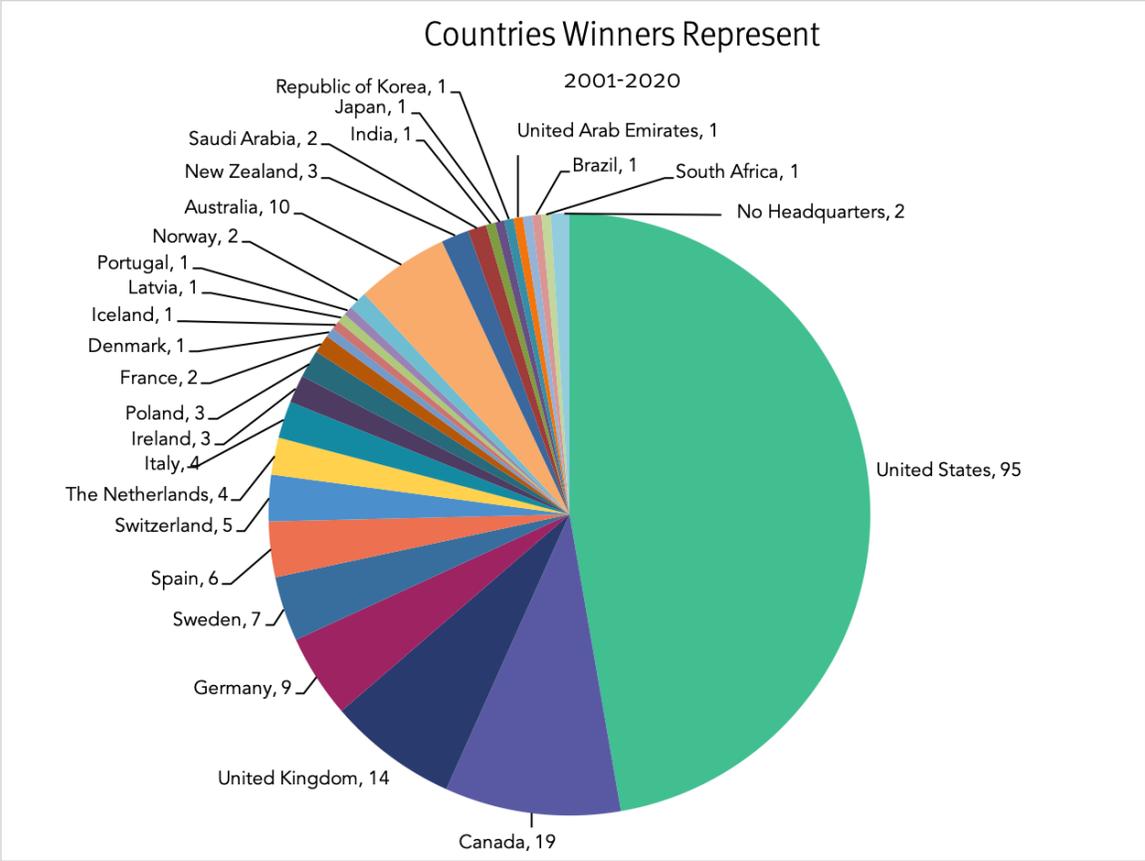
***Countries Winners Represent: 2001–2020.*** *Winning organizations come from 25 different countries. Moving clockwise from the top, countries are grouped by region as North America, Europe, Asia/Pacific (including the Middle East), and South America.*

# Selecting the Winners

# Intranets Not Selected: Common Issues

Intranet design is complex, burdened with vast and enormous political and technological challenges. Small teams with limited expertise, a lack of support from leaders, misguided stakeholder goals, inadequate schedules, old or inflexible systems and technology, and poor content are only a few of the negative factors that lead to poor intranet design.

Following are examples of unfortunate design elements we found among some of this year's non-winning submissions.

## MISUSE OF TILES

Tiles, also known as *cards*, are blocks of text (or images with text) that often include a background color. Cards compartmentalize a piece of content in one area.

In responsive design, cards can make it easier for designers and developers to dictate how each content chunk will move or change depending on the user's view port. But cards can also make it more challenging to create a clear page hierarchy; to address this, designers can indicate content priority by placing important cards toward the top of the page, varying card size, or using different colors and text sizes.

Using many cards with the same dimensions, colors, and font may create a neat-looking page, but it won't help users decide where to look.

## BRANDED LINKS AND MENUS

Managing the overabundance of subsites and external tools that make up today's digital workplaces is extremely difficult, and often makes it hard for employees to find and be productive with the best applications. Finding a way to convey the purpose of each tool has its own challenges. What doesn't usually work? Using the branded tool name or making up a creative name for an internal tool.

Naming tools in relation to the tasks they help users achieve is typically a better choice. So, for example, rather than calling a tool "BlueJeans," opting for "Schedule a Meeting," is a more task-based and intuitive choice.

## MISALLOCATION OF SCREEN REAL ESTATE

Prioritizing content means positioning it appropriately and allocating appropriate space on the page. Taking up a large portion of a page for content of minor importance makes more critical items less visible.

## NO DATES ON NEWS

Even news items that appear on the homepage or at the top of the news section need dates. Otherwise, employees cannot be sure the information is current. Including dates—with the month written out for international audiences and clarity—helps employees clearly understand whether the information they are consuming is current or not. It also increases the credibility of the news and the intranet itself. Likewise, dating all content pages—not just news—and including the author's name and contact information can have the same effect for each page of the intranet.

## INCONSISTENCIES

Missing menus, a page of employee profiles in which half lack photos, a different look for secondary navigation menus, or a list of forms in which only some have descriptions all have the same effect. The result of such inconsistencies is that users require more time and energy to acclimate, making them work harder and question whether the content they are looking at is current.

## HARD-TO-CLICK OR TAP NAVIGATION MENUS

The global navigation should appear on every page of the intranet; it's therefore understandable that some designers might be tempted to make that menu very small. But very small links and links that are close together are difficult to click or tap.

Give the global navigation the space it deserves. It not only advertises what users can do on the intranet, but it also can take them anywhere they want to go.

## OUT-OF-BOX SHAREPOINT

So far, no intranet tool—not even Microsoft SharePoint—makes it possible to simply install it, load in the content, and have it work well for users. No intranet solution eliminates the need for good user research and thoughtful iterative design. Teams must make the intranet fit their organization's needs, even when taking some help from an intranet solution.

## DATED VISUAL LOOK

Stock art and stale visual design can make even a newly designed intranet look like it was made years ago. This can decrease engagement and hurt the intranet's credibility.

## UNRECOGNIZABLE ICONS

Icons can help users understand what a link does. A clear icon may even be memorable and help users quickly scan to the command they want. But when it's unclear what an icon is meant to represent, it does nothing to enhance the UX. It can, in fact, hurt the experience by taking up valuable space on the screen, wasting the user's time, or misleading the user.

## OVERLOADED PAGES

Hundreds of links, too many visuals, an overuse of section indicators—pick your poison. Any of these things can make a page on an intranet hard to consume. Placing too much content on the homepage, or any important page, defeats the purpose and makes the content hard to scan, as well as making it seem less relevant.

## ILLEGIBLE TEXT

Almost every Intranet Design Annual to date has called out the issue of illegible text. That is, body text—and sometimes even subheadings—that are presented in unhelpful formats such as low contrast colors that blend in with the background, hard to decipher typefaces, tiny text sizes, or text on top of images or watermarks. Any of these can make text illegible and thus ineffective.

## QUICK LINKS

The term *Quick Links* is too generic. Use a more telling label in front of *Links*, such as *Popular, Important, New, Most used, Favorite,* or even *My*.

## IMAGES THAT ARE HARD TO DECIPHER

If a user can't make out an image's content, that image isn't worth the space it occupies. Grainy photos, bad artwork, and too-small elements prevent employees from understanding a concept or engaging with an image.

# 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 April 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

Our team of judges conducts baseline design reviews and narrows the field down to tier-one submissions, then narrows that set of designs multiple times to reach the top-10 winners. In the judging process, 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 elements that have emerged from submissions or trends in previous years. We rate each element in each submission on a scale of 0–5, with 5 being the best rating. Some of the 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
- Clear 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 Customization

- Personalization and roles, catering to different offices or cultures
- Ability for employees to customize the intranet in helpful ways

## Information Delivery

- Organization-related news and information
- Information about internal groups and projects

## 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

- Engaging with and sharing content

## Desktop and Mobile

- Mobile offerings that are suited to a small screen

- Desktop design that takes advantage of a large screen (and is not simply the same as mobile)

- Mobile that takes advantage of device features such as camera and location

## Overall

- 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

# List of Images

# 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, contained in the ZIP folder.

# Authors and Acknolwedgements

# 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 leadership, research, and design, she has led many intercontinental research studies, authored a variety of research reports, and coauthored the book *Eyetracking Web Usability*. Named an "intranet guru" by *The Wall Street Journal*, Kara has lectured around the world on intranets and a wide range of other topics. Prior to joining NN/g, she had gained invaluable experience pioneering UX and building and leading UX teams in diverse development environments, and has established several successful UX programs.

A champion for UX, 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.

**Patty Caya** is a freelance journalist (writer and editor) and an award-winning digital media producer. In her business writing, she specializes in topics relating to UX (including social media and mobile design) and the business and technology of the web. She has coauthored 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, Patty 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.

**Maria Rosala** is a UX Specialist with Nielsen Norman Group. She plans and executes independent research for NN/g and leads UX training courses on research topics such as usability testing, as well as psychology and management. Maria developed expertise in intranets through carrying out usability testing on a variety of intranets at public and private organizations in North America and Europe for the 4th edition of the *Intranet Guidelines Report*.

Prior to joining Nielsen Norman Group, Maria worked as a UX researcher at The Home Office in the UK government, where she carried out research in the UK and internationally to improve numerous digital products and services, including internal caseworking systems, online visa

applications, public-facing websites, and various other online and offline services. In late 2017, Maria led a UX team of researchers and designers in a high-profile program to deliver new digital services for use by millions of people in the UK.

Maria has a BSc from the Department of Philosophy, Logic and Scientific Method at the London School of Economics and Political Science, and an MSc in Human-Computer Interaction and ergonomics from University College London.

**Anna Kaley** is a UX Specialist with Nielsen Norman Group. Before joining NN/g, Anna worked for more than 10 years in UX architecture and digital strategy. She has conducted complex user research and experience design for healthcare, agriculture, finance, tourism, retail, and engineering clients. Most recently, she worked at a large retailer where she was responsible for ecommerce UX in both B2C (business-to-consumer) and B2B (business-to-business) channels. Anna is skilled at using qualitative and quantitative research methodologies throughout the design process to drive conversion, increase revenue, and improve satisfaction. She also has expertise in digital media planning, search marketing, and graphic design.

Anna has held UX roles on both internal product teams and in digital agencies of various sizes, and understands the challenges that UX professionals face in both contexts. This familiarity helps her bring a well-rounded approach to her projects and instruction. She creates experiences that meet user and business needs while balancing technical pragmatism.

Anna has a Bachelor of Journalism degree with an emphasis in strategic communication. She attended the University of Missouri, Columbia, and lives in Kansas City.

# 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 this year, and to all organizations who have submitted over the past 20 years!

Thanks to Jeanette Pidanick for her assistance throughout the review process, to Susan Pernice for helping us define and refine that process, and to Keri Schreiner for editing this report.

# Submit Your Intranet

# Submit Your Intranet for the 2021 Design Annual

Have a great intranet? Large or small, you could win next year's Intranet Design Annual competition. But you must enter to win.

- It's free to enter.

- Organizations that don't win are never disclosed in any reports or presentations.

- Your intranet may be better than you think.

The competition opens in early May 2020, 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

- Solutions to internal communications that use intranet technologies

- Internal web-based applications

- Extranets

Get recognition for your team's work. Good luck!

# About NN/g

# A Leading Voice In The Field of User Experience Since 1998

- **Conducting groundbreaking research.** Every week, somewhere around the globe, NN/g team members are conducting user experience research. Our experts are experienced at executing dozens of research methodologies. We know when and how to apply each one, resulting in trusted insights that inform everything we do.

- **Evaluating interfaces of all shapes and sizes.** We've tested thousands of different user interface designs over the years. Every year we evaluate hundreds of interfaces, adding to our collective understanding of design and user behavior. Our experts work with users, interfaces and organizations from all over the world, widening our collective understanding.

- **Insights with more depth.** We don't have a narrow focus. Our observations are the result of the cumulative findings across a large volume and variety of circumstances, making them highly valid and comprehensive.  For everything we publish, we combine our collective knowledge of longstanding patterns with any new findings we uncover from our targeted research studies. This allows us to interpret observations through the lens of the dozens of similar things we've seen before to conclude their importance and validity. So this report is based not only on our most recent research on the topic, but more than 20 years of UX knowledge.

## OUR EXPERTS DO IT ALL

Our experts are researchers, educators, and UX Design practitioners all in one. Everything we do informs the 3 pillars of our business, research, training, and consulting.

- **Research** —  Every person on our team conducts research. We tackle every topic in UX from the most evergreen challenges like information architecture to the most recent and emerging trends.

- **Training** — Our UX Conference training events take place in cities around the world.



Attendees learn from NN/g experts and invited industry peers, leaving with practical skills that can be applied immediately.

With more than 40 courses available, there's something for everyone. Courses are taught in areas such as: research practices, design processes, working with stakeholder and product teams, among other things.

- **Certification** — Our certification program helps UX professionals quickly gain skills and credibility. By taking 5 courses and passing related exams, practitioners earn NN/g UX certification and badge, a recognized credential in the industry.

- **In-house Training** — Many of our courses can be taught at your location and customized to fit your unique needs. In-house training is ideal for teams that want to spread user experience perspective throughout a large group and those working on large projects that need to kick start the creative process and head in the right direction.

- **Consulting** — Our experts are available for custom consulting. Our services include but are not limited to:

  - **Design Reviews and Competitive Analysis** (starting at $38,000 USD)

  - **Usability testing** (starting at $20,000)

  - **Benchmarking** (starting at $45,000)

## PUBLICATIONS AND CONTENT

Over the years, our experts have developed a comprehensive body of knowledge and UX resources. We've taken the results of our decades of research and distilled it down into actionable guidelines, best practices and proven methodologies.

### Articles and Videos

Over the years, we have created one of largest and most comprehensive sources of free user experience content and research insights.

- **Articles** — Each week we publish new articles (link) on current UX topics available to practitioners around the world at no cost.

- **Videos** — In addition to our free articles, we produce a variety of short topical UX videos posted to our YouTube channel (link) weekly.

### Reports

Our research library contains more than 60 published reports and books addressing a variety of topics including but not limited to the following:

- Doing UX in Agile Environments

- UX Design for specific audiences (e.g., children, college students, seniors, people with disabilities)

- Information Architecture

- B2B Websites

- Corporate Websites
- Ecommerce UX Design
- Marketing Email and Newsletters
- Intranets
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