

Best Small Organization Intranets *2011-2020*

18 Case Studies of Award-Winning Intranets from Companies With 2,000 or Fewer Employees; Reprinted from the *Intranet Design Annuals*

By Kara Pernice, Amy Schade, Patty Caya, Jakob Nielsen, Maria Rosala, and Anna Kaley

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48105 WARM SPRINGS BLVD., FREMONT CA 94539-7498 USA

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About Small-Company Intranets

THE WINNERS

2020

[Angelini Holding SpA, 6,000 users](#)

[Korn Ferry, 10,000 users](#)

2019

[European Bank for Reconstruction \(EBRD\), 3,000 users](#)

[Messer Construction Co., 1,200 users](#)

2018

[American Medical Association \(AMA\), 1,000 users](#)

[Archer Malmo, 250 users](#)

[Capital Power, 920 users](#)

2015

[Accolade, 200 users](#)

[Klick Health, 400+ users](#)

[Saudi Food & Drug Authority, 2,000 users](#)

2014

[National Geographic Society, Approximately 1,500 full-time employee users \(plus numerous contractors, interns, and international partners\)](#)

[triptic, 20 users](#)

2013

[Acorda Therapeutics, Inc., 350 users](#)

[Luzerner Kantonalbank AG, 1,000 users](#)

2012

[CenturyLink Business, approximately 2,000 users](#)

[LivePerson, Inc., 550 users](#)

2011

[Bennett Jones LLP, 925 users](#)

[Mota-Engil Engenharia e Construção, S.A., 500 users](#)

Winners for 2009 and previous years are not included in this current report. But, please see the *Intranet Design Annual* for each year, for example at: <http://www.nngroup.com/reports/intranet/2009>

"SMALL" IN EMPLOYEE NUMBER ONLY

When qualifying a business as *small*, the U.S. Small Business Administration (<https://www.sba.gov/>) considers multiple factors such as industry, sales, and number of employees. In this report, we consider only number of employees for the cutoff mainly because number of employees directly relates to the number of intranet users, this is a simple measure, and we have this accurate information. And while the SBA considers businesses with 1,500 or fewer employees to be small, we include in this report organizations with 2,000 or fewer employees. We did this because when we looked at the features the intranets offered and content provided, the additional 500 employees didn't seem to have much effect.

AVERAGE ORGANIZATION SIZE OF WINNERS

The best intranets across all years of the Intranet Design Annual have supported an average of 53,600 employees. So the set of best intranets does tilt toward larger organizations. But the spectrum of small to large organizations represented shows that powerful and user-centric intranet designs can be created regardless of company size, given the right team, tools, goals, leadership, and support.

USING MS SHAREPOINT

Using MS SharePoint seems to be as common at small organizations as it is at large ones. In this winning set of small companies, six out of the 12 use a version of SharePoint.

- 2015, 2: Accolade and Saudi Food & Drug Authority, 2,000 users
- 2014, 1: National Geographic Society used MS Search Server 2010
- 2013, 1: Luzerner Kantonalbank AG
- 2012, 0
- 2011, 1: Bennett Jones LLP
- 2010, 1: Huron Consulting Group

While it is unlikely that an intranet team at a small company would have a SharePoint developer on their fulltime staff, it is just as unlikely that a large company would have one on their fulltime staff. Instead, companies, large and small, look to the pool of SharePoint consultants to be their partners in their intranet redesign.

NOT MUCH PERSONALIZATION

Many large organizations take advantage of the benefits that role-based intranets can afford, such as: pushing the right content and tools to appropriate people, hiding information people should not be privy to, de-cluttering pages and menus, and auto-filling in forms. But hardly any small intranets offer personalization. Some do offer customization, in which the user takes the initiative to create bookmarks and choose the type of news she is interested in. But most small-company intranets do not assign roles to people and change the UI and content based on the logged in user's role as a personalized system would.

The cost of creating role-based intranets is high, the backed work is a grand endeavor, and the infrastructure and databases at the organization must be thorough and up-to-date. Some of these elements are not conducive to smaller organizations, and may deter creating personalized systems.

Also, the need for and benefits from personalization can be greater when there are many people in different locations or countries, with various job types, and working in numerous divisions or units at an organization.

EXTERNAL CONSULTANTS ON THE TEAM

Not surprisingly, most small-company intranets employ external consultants as part of their design team: nine out of 12 employed external consultants in areas such as design, research, and most often, development for their intranets. All of these winners had some in-house team for the intranets also, and none were staffed solely with external consultants.

The three small organizations that did not enlist external consultants to help with their design—Klick Health, LivePerson, Inc., and triptic—had some of the smallest number of employees, with 400+ users, 550 users, and 20 users respectively.

Many organization, large or small, find it necessary to augment in-house teams with a variable number of external contributors at different points in the project. Intranet teams grew during the creation of the intranet as external resources helped out, then reduced again to a fixed number of in-house staff once intranets projects were finished.

TEAM SIZE TO ORGANIZATION SIZE

An appropriate *percentage* of team size to organization size will vary as much as an appropriate number of Intranet team members per organization would. For example, it is probably not realistic for an organization with 230,000 employees to have 0.138% of that number (2014 average intranet staff as a percentage of total organization staff) staff working on the intranet, as that would result in 317 people working on the site. Nor would the same percentage value work at Accolade, supporting 200 employees, as that would warrant just a quarter of a person on the intranet team.

As such, we compared team size to organization size over the last six years of our Intranet Design Annual by segmenting organizations into three size ranges.

- Fewer than 5,000 employees: 9 intranet staff per 1,000 employees (0.93%)
- 5,000-20,000 employees: 1.9 intranet staff per 1,000 employees (0.19%)
- More than 20,000 employees: 0.4 intranet staff per 1,000 employees (0.04%)

Note that the numbers in our calculations include consultants who helped in various phases of the intranet projects.

Intranet teams left to maintain the systems are composed of far fewer people than the team sizes in the following list of intranet team size compared to company s (based on Annual Winners from 2010-2015, 60 organizations). It is essential to keep even a small intranet sufficiently staffed when a redesign project is over. Even the best intranet will suffer if no one maintains it.

Note that it is certainly possible to create an intranet with fewer staff. For example, Luleå University of Technology won a Design Annual award in 2001 with just three

members on its intranet team. And North Tyneside College won in 2003 with a team of one person.

Bennett Jones LLP (2011)

Using the intranet:

Bennett Jones LLP is one of Canada's largest law firms and is recognized internationally, with offices in Calgary, Edmonton, Ottawa, Toronto, Dubai, and Beijing. The offices vary significantly in size (from six to almost 500 people) and are geographically dispersed.

Number of employees the intranet supports:

Approximately 925

Company locations:

Calgary, Edmonton, Ottawa, Toronto, Beijing, and Dubai

Locations where people use the intranet:

Alberta and Ontario, Canada; remotely from the US, UK, Europe, Middle East, China, and India

Design team:

The in-house core project team was selected to represent the interests of lawyers (30 practice groups) and staff (14 administrative departments), directed by a small steering committee of very senior managers who met weekly throughout the project. The team had 12 people in all.

Habañero Consulting Group was responsible for user experience and design (look and feel).

V51 Consulting Inc. was responsible for solution architecture and building the intranet (in SharePoint).

RBRO Solutions Inc. was responsible for integration between Interwoven Worksite (DMS) and the intranet.

Members:

In-house:

Adeniyi Adebayo, National Director, IT; Brian Bawden, National Director, KM; Stephen Bowman, Managing Partner, Toronto; Lorene Cowburn, Office Manager, Edmonton; Karyn Highet, Intranet Coordinator; Andrew Lewis, Team Lead, Systems Development; Kindra McNish, Project Manager/Analyst; Shelagh Mikulak, National Director, Information Resources/Libraries; Aldona Oleinikas, KM Coordinator; Duncan Quarrington, KM Lawyer; Jim Smith, Team Lead, Applications; and Siobhan Walsh, Chief Administrative Officer

Habañero:

Kurtis Beard, Interaction Designer; Jonathon Kay, Interaction Designer; Kathleen Moynahan, Senior UI Designer; Benedict Ng, Interaction Designer; Bryanne Philibert, Project Manager; and Ben Skelton, User Experience Lead and Senior Information Architect

V51:

Akiva Bernstein, Business Analyst and Information Architect; Frank Gasparovic, SharePoint Developer; Nicolas Munson, Trainer; Vincent Pollard, CSS Developer; Debbie Rothstein, Project Manager; Matt Stark, Technical Architect and Lead SharePoint Developer; and Jason Viera, Quality Assurance Lead

RBRO:

Gerrick Denton, Systems Consultant, and Howard Russell, Co-CEO, Professional Services

SUMMARY

When the Bennett Jones team set out to redesign the intranet, their goal was to achieve greater efficiency and a better work product for less money. They faced the daunting challenge of wrangling a law firm's knowledge capital and making it simple to find, use, and update for the firm's 925 employees, including more than 400 legal professionals. They also wanted the tool to help build a cohesive culture across the firm's offices. Finally, they wanted to be ahead of the curve in technology use to help attract and retain the best legal talent available.

The team recognized that the site's main emphasis had to be knowledge sharing and management. In this busy law firm, the people with the most expertise had varying technical skills and little time to learn new tools. The designers thus knew they had to make knowledge sharing a routine activity, rather than an extra and complicated task.

User experience was key to the site's success. To that end, they worked with a user experience design company to identify requirements and discover cultural differences among the offices.

The homepage features *News and Announcements*, including *From the desk of* announcements from key senior executives, such as Hugh L. MacKinnon, the firm's Chairman and CEO. The homepage provides firm news, as well as press mentions. Local news is followed by events around the firm. Employees are celebrated through the *New Arrivals* and *Anniversaries* sections. *Anniversaries* lists the honored employees, their departments, and how long they've worked at the firm.

The side of the page includes news headlines, filtered for relevance through a news aggregator, and a fact of the day, along with a poll and list of popular links. The page also features recent firm photos, and invites users to share their own photographs.

The straightforward homepage nicely summarizes new information and emphasizes the firm's recognition of its employees as great assets.

The page provides clear navigational choices. Additional links appear at the top of the page, allowing users to access tools including a personalized list of links, forms, and templates, Web links, and firm blogs.

The *KSN* tab, next to *News + Announcements*, displays the latest posting from *The Knowledge Sharing News*, the only firm-wide blog in BenNet, as well as a continuously updated listing of content added to *Knowledge Bank* in the last seven days.

BenNet

[Welcome Brian Bawden](#)
[Home](#)
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[Forms + Templates](#)
[Web Links](#)
[Blogs](#)

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[PEOPLE FINDER](#)

[Knowledge Bank Search](#)

[Knowledge Bank](#)
[Our Teams](#)
[How Do I...?](#)
[CLE + Training](#)
[Policies + Benefits](#)
[Our Offices](#)

NEWS + ANNOUNCEMENTS

KSN

From the desk of *Hugh...*

John Weekes

We are delighted to announce that John Weekes has joined the firm as a Senior Business Advisor in our Ottawa office. Prior to joining Bennett Jones...

[Continue Reading...](#)



FIRM NEWS

Apr 15, 10 [LiveWell WorkWell May/June 2010](#)

Apr 08, 10 [New Firm Publication - Caveat Counsel: Care and Caution in the Boardroom](#)

Apr 07, 10 [John Weekes](#)

[See All Firm News](#)

BENNETT JONES IN THE NEWS

Apr 15, 10 [Bennett Jones LLP in the News](#)

[See All BJ in the News](#)

TORONTO OFFICE NEWS

Apr 15, 10 [4th Annual Sporting Life 10K Law Challenge - Join Team Bennett Jones...](#)

Apr 14, 10 [Spring Programs at the Adelaide Club](#)

Apr 12, 10 [The Unveiling of the new Torontopath.com Website - Prizes Galore!](#)

[See All Office News](#)

FIRM EVENTS

The week of April 12 « [Previous week](#) | [Next week](#) »

Apr 13, 10 [Partners Expenses Cutoff for April 15th Cheques](#)

Apr 14, 10 [ELOMA - Annual Support Staff Seminar](#)

Apr 15, 10 [Telus Open House](#)

[See All Firm Events](#)

NEW ARRIVALS IN TORONTO

no new arrivals

[See New Arrivals In All Offices](#)

ANNIVERSARIES

Donna	Corporate/Staff (25 years)
Deanne	Corporate Services/Staff (7 years)
Kelly	Litigation/Staff (7 years)
Mona	Corporate/Staff (5 years)
Jennifer	Litigation/Staff (5 years)
Jason	Litigation/Legal Professionals (5 years)
Kim	Accounting/Staff (2 years)
Lorraine	Corporate/Staff (1 years)
Eileen	Accounting/Staff (1 years)
Linda	Staff (1 years)
Knox	Corporate/Legal Professionals (1 years)

Thursday, April 15, 2010

Toronto
16°C, Mostly Cloudy

HEADLINES

GE Capital the key to GE's quarter
Google profit bounces back
Credit Suisse Hires Proxy-Fight Expert
Tulane: S.E.C. Official Urges Caution on Regulation
Google beats Street with 23% jump in Q1 revenue
Icahn ups offer for Lions Gate

NEW CANADIAN SMALL CENT COIN IS RELEASED APRIL 15, 1920



THIS WEEK'S POLL

Have you found the Blogs on BenNet useful?

☐ Not sure how to use them
☐ I have read some but never submitted anything
☐ I love blogs
☐ I will provide my feedback via the FeedBack box on BenNet

You already voted for this poll.

[Results and Past Polls](#)

POPULAR LINKS

<http://www.bennettjones.com>

Research Sites

News Sources

Forms

[See More Links](#)

FIRM PHOTOS

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[About BenNet](#)

Bennett Jones LLP

Pictured: The homepage emphasizes news and employee information.

The site had to provide immediate access to essential information related to the day-to-day work of the firm. One key to success was empowering lawyers to find precedents as quickly as possible, on their own. To this end, the site's core is the *Knowledge Bank*, a repository for legal documents, research materials, clauses, and resources. Subject matter experts select the information and classify it by type, transaction, area of law, jurisdiction, and other parameters.

The problem with many document repositories is that, as they grow, they become too difficult to use. Users often must navigate folder structures that make finding the right resources difficult. Bennett Jones' team members realized this, and knew they had to build a powerful and simple tool to ensure that employees could quickly find the right precedents.

They started with AJAX-enabled auto-fill to help guide users in the right direction. With impatient users and more than 650 document types — as well as other robust categories — the designers realized that auto-filling suggestions could help expose category names and simplify user selections.

Users start a *Knowledge Bank* search by entering a search query under *Document Type*, *Transaction Type*, or *Area of Law*. As a user types, matches related to the entry appear. In this way, users don't have to think to look under "statutory compulsory acquisition." Instead, the option appears when users type "comp."

Users can also browse by category. All categories are listed on the page, followed by the number of available resources in each.

BenNet Welcome Brian Bawden Home My Stuff Forms + Templates Web Links Blogs

MY SOFTWARE PEOPLE FINDER **Ask Ben** Enter search term Knowledge Bank Search

Knowledge Bank Our Teams How Do I...? CLE + Training Policies + Benefits Our Offices

WHERE AM I? Home Knowledge Bank Precedents

KNOWLEDGE BANK
PRECEDENTS
 RESEARCH
 CLAUSES
 FIRM PUBLICATIONS
 BenNet Books

Precedents

Browse the Precedent Bank
 To find Precedents most relevant to your needs, explore the taxonomies below, or simply begin typing in the box of your choice, under Document Type, Transaction Type or Area of Law, and all of the possibilities that match what you are typing will appear. Select one to produce a set of results that you can quickly narrow down to a handful, by applying filters and/or searching within results for keywords.

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 Submit your new content to the Knowledge Bank to share!
[SHARE](#)

RECENTLY ADDED: 06 Last 7 Days 41 Last 30 Days **TOTAL:** 2351

DOCUMENT TYPE	TRANSACTION TYPE	AREA OF LAW
 Acknowledgement / Receipt (45) Affidavit / Declaration (58) Agenda / List / Questionnaire (123) Agreement / Undertaking (822) Application / Petition (30) By-Law / Resolution / Articles (108) Certificate / Coupon (109) Circular / Prospectus / AIF (34) Consent / Permit (26) Deed / Indenture (21) Direction / Authorization (36) Letter (293) Memorandum (58) Minutes (3) Note / Bond / Debenture (33) Notice / Invitation (140) Offer / Term Sheet (27) Opinion / Advice (74) Order / Ruling (124) Plan / Proposal (36) Power / Appointment (7) Proxy / Ballot / Nomination (2) Release / Discharge / Waiver (35) Request / Demand / Requisition (20) Resignation / Cancellation / Revocation (6) Statement / Filing (177) Terms / Conditions / Rules (41) Will / Codicil (1)	 comp Business Practices / Compliance Programs (6) Governance / Management Compensation / Benefits (54) Employment / Benefits Complaint / Prosecution (1) Proceedings / Hearings / Inquiries Environmental Compliance (14) Environmental / Land Use Statutory Compulsory Acquisition (10) Mergers / Acquisitions / Reorganizations Privacy (48) Infrastructure / Privatization (1) Insolvency / Debt Restructuring (308) Manufacturing / Development (125) Marketing / Distribution (48) Mergers / Acquisitions / Reorganizations (628) Organizations / Entities (127) Outsourcing / Consulting (20) Proceedings / Hearings / Inquiries (97) Real Estate / Land Development (159) Regulated Products / Regulated Activities (1) Trade / Foreign Investment (9)	 Alternative Dispute Resolution (2) Bankruptcy / Insolvency (375) Broadcasting (1) Climate Change / Emissions (34) Commercial Transactions (538) Competition / Antitrust (4) Construction (14) Corporate Governance (97) Electricity Generation / Transmission (20) Employment / Labour (124) Environmental (60) Financial Services / Banking (166) First Nations / Aboriginal (0) Foreign Ownership / Investment (9) Forestry / Forest Products (0) Franchising (6) Infrastructure / Projects (0) Insurance (1) Intellectual Property (151) International / Cross-Border (60) Landlord / Tenant (23) Litigation (233) Maritime / Law of the Sea (1) Media + Entertainment (3) Medical Malpractice (0) Mergers + Acquisitions (530) Mining / Mineral Extraction (15) Oil + Gas (314) Pensions + Benefits (63) Practice Management (4) Privacy (4) Private Equity / Venture Capital (94) Professional Responsibility / Ethics (6) Public Policy (1) Real Estate (161) Regulated Industries / Products (15) Renewable / Alternative Energy (2) Securities + Public Markets (438) Structured Finance (0) Taxation (55) Technology + eCommerce (7) Telecommunications (51) Trade Regulation (9) Wills / Estates / Trusts (1)

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Bennett Jones LLP

Pictured: AJAX-enabled auto-fill helps employees quickly find the category they need from the *Precedents* search page.

Once the site returns initial results, a faceted classification does the rest. Like those often-used on e-commerce sites, the system lets users quickly reduce hundreds of results and locate the right documents in two or three clicks. Although team members worried that users might have trouble navigating the accordion facet structure, they've been surprised by its success. The tool has proven quite powerful — and quite popular as well. Users can also full-text search the results if using facets fails to identify the appropriate resource.

Results are returned as information "snapshots" that summarize key information, including the descriptive document name, file type, classification, date, and summary.

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MY SOFTWARE

PEOPLE FINDER

Ask Ben

Enter search term

Knowledge Bank Search

Knowledge Bank

Our Teams

How Do I...?

CLE + Training

Policies + Benefits

Our Offices

WHERE AM I?

Home

Knowledge Bank

Precedents

Results

NARROW RESULTS BY:

DOCUMENT TYPE

Agreement / Undertaking

TRANSACTION TYPE

AREA OF LAW

Alternative Dispute Resolution (1)

Bankruptcy / Insolvency (74)

Climate Change / Emissions (27)

Commercial Transactions (229)

Competition / Antitrust (1)

Construction (4)

Corporate Governance (18)

Electricity Generation / Transmission (21)

Employment / Labour (50)

Environmental (19)

Financial Services / Banking (82)

Franchising (4)

Insurance (1)

Intellectual Property (21)

International / Cross-Border (25)

Landlord / Tenant (19)

Litigation (7)

Marine / Maritime (1)

Media + Entertainment (2)

Mergers + Acquisitions (185)

Mining / Mineral Extraction (6)

Oil + Gas (217)

Pensions + Benefits (13)

Private Equity / Venture Capital (35)

Real Estate (67)

Regulated Industries / Products (5)

Renewable / Alternative Energy (2)

Securities + Public Markets (98)

Taxation (24)

Technology + eCommerce (2)

Telecommunications (26)

Trade Regulation (2)

JURISDICTION

EXAMPLE / MODEL / COLLECTION

TRIBUNAL TYPE

SECURITY TYPE

Results

846 RESULTS

Search within results

GO

Sort By Rank

1 2 3 4 5 6 7 Next >

Results per page 10

Lease Agreement – Net Office Lease – Annotated

Jurisdictions

Internal

Example

June 10, 2010

More Info

Describes and explains terms and conditions of net office lease

Lease Agreement – Offer to Lease – Generic

Jurisdictions

Internal

Example

June 09, 2010

More Info

Governs terms and conditions of offer to lease premises for use as doctor's office

Agreement of Purchase and Sale – Vacant Land – Generic

Jurisdictions

Internal

Example

June 09, 2010

More Info

Provides purchaser friendly terms and conditions for purchase and sale of vacant parcel of land

Ethanol Sales Contract – Energy – Growing Power Midway

Jurisdictions

Internal

Example

April 23, 2010

More Info

Sets out terms and conditions for purchase, delivery and transportation of denatured ethanol

Supplemental Agreement – Retirement Income – BNC Devco

Jurisdictions

Internal

Example

March 31, 2010

More Info

Provides for supplemental pension benefits for CEO

Services Agreement – Pension Administration – BNC Devco

Jurisdictions

External

Example

March 31, 2010

More Info

Sets out terms and conditions for provision of third party benefits administration, incorporating Financial Services Authority's Terms of Business (UK)

Administration Agreement – Employee Incentive Plan – BNC Devco

Jurisdictions

Internal

Example

March 31, 2010

More Info

Details duties and obligations of administrator, remuneration and termination of agreement

Pre-Acquisition Agreement – Take-Over Bid – BNC Devco

Jurisdictions

Internal

Example

March 02, 2010

More Info

Prospective buyer commits to make formal bid on agreed terms, and target board commits to recommend that its shareholders accept bid, subject to fiduciary out and break fee

Indemnification Agreement – Directors & Officers Liability – Generic

Jurisdictions

Internal

Model

January 13, 2010

More Info

Provides for corporation to indemnify individual serving as director and/or officer against liabilities arising out of service to, or activities on behalf of, corporation

Share Purchase Agreement – Private Target | Single Vendor/Purchaser – BJ Model

Jurisdictions

Internal

Model

January 08, 2010

More Info

Provides for sale of shares of private corporation with multiple subsidiaries by a single vendor for cash

1 2 3 4 5 6 7 Next >

Results per page 10

SEARCH TIPS

Narrow your search by selecting options in the left column.

Search within results to narrow your search ever further.

Look for helpful icons that highlight the best resources.

TOOLS

Email this Page

Print this Page

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About BenNet

BEST

2010

AWARD

Bennett Jones LLP

Pictured: Faceted search helps employees quickly find the right documents. An accordion structure on the side of the page lets users filter by information type.

Information pages about each resource provide further detail, including a full description, context, and any warnings associated with use of the document or information. Related documents are shown as well.

Employees can attach a comment to any resource, making it easy to report something as simple as a typographical error or as significant as information about new legislation. The *Add Comment* button attaches the comment to that resource automatically. Knowledge Management (KM) team members review all added comments in case they need to fix a piece of information or respond to a comment.

After some consideration, the team decided to allow anonymous comments. While users are always identified on the back-end, the team lets users publish comments without displaying their names. The team was concerned that more junior employees might be reluctant to comment on an item posted by someone more senior at the firm. Indeed, in practice, the team has seen very good comments by junior people in the firm, which were submitted with the name withheld, so they're happy with their decision.

Another handy piece of information on the page is endorsements. These endorsements arrive via other site tools that let users create personal *My Stuff* pages and let groups create team-specific *Knowledge Bank Favorites* lists.

Anytime a group or individual saves a piece of content to their list, the user or group's name is associated with that piece of information. This acts as a "peer endorsement" of the resource, working under the assumption that anyone bookmarking a resource finds that resource valuable. This information is shown with the resource in the *Knowledge Bank*, letting users quickly assess the document's "pedigree" — who wrote it, who submitted it, and who likes it.

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MY SOFTWARE PEOPLE FINDER Ask Ben Enter search term Knowledge Bank Search

Knowledge Bank Our Teams How Do I...? CLE + Training Policies + Benefits Our Offices

WHERE AM I? Home > Knowledge Bank > Precedents > Direction to Depositary – Compulsory Acquisition – BJ Model

Direction to Depositary – Compulsory Acquisition – BJ Model

« Back to Results OPEN DOCUMENT

Description Target corporation authorizes and directs Depositary to disburse to dissenting offerees, as payment in full for remaining shares not tendered to successful take-over bid, proceeds provided to Depositary by offeror, in accordance with CBCA Section 206(8)

Context Fourth in sequence of five separate documents needed to implement compulsory acquisition of shares from dissenting offerees pursuant to Canada Business Corporations Act section 206, following successful take-over bid

Document Length 1 pages

Submitted by Kathleen

Authors Jeff

Created Oct 01, 2008

Last Review Date N/A

Status Model

Curators Kathleen

Source Internal

Office Toronto

BenNet # 0014563

DMS-KM # 79863 v 2

Original DMS # 5186796 v 1

Hide additional fields

COMMENTS ADD COMMENT

You may post comments on this document. Use comments to suggest improvements to the document or to share insights or experience that may help others to use the document more effectively.

WARNING
This document was prepared for use in a cash take-over bid; appropriate modification will be required if take-over bid is not for cash only

SEE ALSO

Related Documents

- Notice of Acquisition – Compulsory Acquisition – BJ Model
- Notice of Adverse Claim – Compulsory Acquisition – BJ Model
- Direction to Offeror – Compulsory Acquisition – BJ Model
- Notice to Dissenting Offerees – Compulsory Acquisition – BJ Model

TOOLS

- Add to My Stuff
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ENDORSEMENTS

- Firm Precedent
- Group Precedent
 - Capital Markets + M&A

Included In My Stuff
14 people

- Darcy
- Olu
- Colin
- Paul
- Alison
- Brian
- Claire
- Trevor
- Jennifer
- Chris
- Amanda
- Taria
- Charlene
- Jordan

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BEST
IN CANADA
2010
REPORT ON BUSINESS

Bennett Jones LLP

Pictured: Information about each resource in the *Knowledge Bank* is accompanied by comments about the resource, as well as a list of endorsements, indicating which individuals or groups in the firm found that resource useful enough to bookmark.

Team members realized that if it were difficult to share or create knowledge, users wouldn't do it. They therefore created tools to make it as simple as possible to add to the firm's *Knowledge Bank*. *BenNet Books*, for example, lets users assemble *Knowledge Bank* information into guides. To do this, they link resources together, like a book, and thus summarize information about complete topics or processes. Any user can assemble a guide, using a table of contents to link the list of resources.

Books are shared with all offices, and anyone can use or contribute to them, or provide suggestions for improvement.

BenNet

Welcome Sean Pitt Home My Stuff Forms + Templates Web Links Blogs

MY SOFTWARE PEOPLE FINDER

Ask Ben Enter search term Knowledge Bank Search

Knowledge Bank Our Teams How Do I...? CLE + Training Policies + Benefits Our Offices

WHERE AM I? Home > Knowledge Bank > BenNet Books > More Info > Getting Employment Injunctions in Ontario

Getting Employment Injunctions in Ontario << Back

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- VII. Factum (Responding Party)
- VIII. Book of Authorities
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- X. Notice of Action
- XI. Order
- XII. Undertaking

III. AFFIDAVIT (MOVING PARTY)

A. Purpose of Moving Party's Affidavit

Rule 39.01(1) of the *Rules of Civil Procedure* provides that evidence on a motion or application may be given by affidavit unless a statute or the *Rules of Civil Procedure* provide otherwise.

Rule 4.06(2) states that affidavits must be confined to facts within the personal knowledge of the deponent or to evidence that the deponent could give if testifying as a witness in court. Generally on motions, affidavits may contain information and belief (i.e., hearsay statements) provided that the source of information and the fact of the belief are specified (rule 39.01(4)).

If the motion is being made on notice, affidavits on which the motion or application is founded shall be served with the notice of motion or notice of application, and shall be filed with proof of service in the court office where the motion or application is to be heard at least seven days before the hearing (rule 39.01(2)). The judge or master hearing the application may waive compliance with this requirement in exceptional circumstances.

Rule 4.06(1) requires that an affidavit used in a proceeding shall be in Form 4D; expressed in the first person; state the full name of the deponent, and if the deponent is a party or a solicitor, officer, director, member or employee of a party, shall state that fact; be divided into paragraphs, numbered consecutively, with each paragraph being confined as far as possible to a particular statement of fact; and be signed by the deponent and sworn or affirmed before a person authorized to administer oaths or affirmations.

Rule 4.06(3) requires that an exhibit that is referred to in an affidavit shall be marked as such by the person taking the affidavit, and where the exhibit is referred to as being attached to the affidavit, it shall be attached to and filed with the affidavit; where it is referred to as being produced and shown to the deponent, it shall not be attached to the affidavit or filed with it, but shall be left with the registrar for the use of the court, and on the disposition of the matter in respect of which the affidavit was filed, the exhibit shall be returned to the solicitor or party who filed the affidavit, unless the court orders otherwise; and where it is a document, a copy shall be served with the affidavit, unless it is impractical to do so.

On a motion for injunctive relief, it is imperative that the affidavits set out the facts supporting the need and legal test for injunctive relief: (a) is there a serious question to be tried? (b) will the moving party suffer irreparable harm? (c) which party will suffer the greater harm from granting or refusing the remedy pending a decision on the merits? (see *RJR-MacDonald Inc. v. Canada (A.G.)*, [1994] 1 S.C.R. 311).

If the moving party is moving without notice, the affidavit will be the only evidence before the judge and must satisfactorily meet the moving party's burden. In addition, the moving party on a motion without notice has an obligation to make frank and full disclosure of all material facts.

The name of the person attesting to the swearing of the affidavit must be typed or legibly printed below his or her signature.

B. Examples of Moving Party's Affidavits

- [Affidavit - Employment Injunction - \[Link\]](#)
- [Supplementary Affidavit - Employment Injunction - \[Link\]](#)
- [Expert's Affidavit - Employment Injunction - \[Link\]](#)
- [Affidavit - Employment Injunction - \[Link\]](#)

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Pictured: BenNet lets employees group related resources and documents together. This lets employees summarize processes and procedures, linking closely related documents to one another in a simple but powerful way.

The impressive attention to detail on the site doesn't end in the *Knowledge Bank*. The rest of the site is equally well considered. Like a traditional intranet, the rest of the site includes information about policies, procedures, and forms. Team members created three main content categories: *Policies*, *How Do I..?*, and *Forms + Templates*. They developed a 12-category system for organizing this information, using the same organizational structure in the three site areas. They've found that users are successful locating the information they need with little or no training in how to use these areas. The structure enables people to find content without having to know what department is responsible for the content. The common structure makes information easy to locate, but also makes it easy to maintain.

The *How Do I..?* section in particular has drawn praise from new hires and long-time employees for both its function and content. Creating these sections had the added benefit of helping the firm centralize and streamline data and processes, which had an end result of cutting down on paper costs.

BenNet Welcome Brian Bowden Home My Stuff Forms + Templates Web Links Blogs

MY SOFTWARE PEOPLE FINDER Ask Ben Enter search term GO Knowledge Bank Search

Knowledge Bank Our Teams **How Do I...?** CLE + Training Policies + Benefits Our Offices

WHERE AM I? Home > How Do I...

How Do I...?

FILE + DOCUMENT MANAGEMENT

- » [Manage conflicts and secrets](#)
- » [Open a file](#)
- » [Deal with documents](#)
- » [Close a File](#)
- [See more](#)

ACCOUNTING

- » [Pay vendors and expenses](#)
- » [Bill clients](#)
- » [Collect from clients](#)
- » [Manage trusts](#)
- [See more](#)

TECHNOLOGY

- » [Contact the Help Desk](#)
- » [Use software](#)
- » [Request hardware](#)
- » [Use phones and blackberries](#)
- [See more](#)

PRACTICE SUPPORT

- » [Corporate](#)
- » [Litigation](#)
- » [Students](#)
- » [Respond to an audit letter](#)
- [See more](#)

RESEARCH

- » [Plan my research strategy](#)
- » [Ask the Librarians for Help](#)
- » [Get a QL or Westlaw Canada password](#)
- » [Bill research costs to a file](#)
- [See more](#)

AFTER HOURS

- » [Arrange for access to the office](#)
- » [Turn on the lights](#)
- » [Request support from the Help Desk](#)
- » [Reserve booked time with DocPro](#)
- [See more](#)

MEETINGS

- » [Reserve a boardroom](#)
- » [Arrange for a videoconference](#)
- » [Order catering](#)
- » [Run a good meeting](#)
- [See more](#)

SAFETY, SECURITY + HEALTH

- » [Ensure the security of Bennett Jones](#)
- » [Contact Security](#)
- » [Deal with a medical emergency](#)
- » [Respond to emergency evacuation](#)
- [See more](#)

OFFICE SERVICES

- » [Arrange for a courier](#)
- » [Find out when mail is picked up](#)
- » [Report a maintenance problem](#)
- » [Request repairs to equipment or furniture](#)
- [See more](#)

MARKETING

- » [Request promotional gifts & tickets for clients](#)
- » [Arrange for a client event](#)
- » [Respond to a Request for Proposal \(RFP\)](#)
- » [Use our logo](#)
- [See more](#)

TRAVEL

- » [Book a hotel room](#)
- » [Book a flight](#)
- » [Rent a car](#)
- » [Get directions to the office](#)
- [See more](#)

CAREER + EMPLOYMENT

- » [Change my personal information](#)
- » [Request a leave of absence](#)
- » [Upgrade my knowledge and skills](#)
- » [Report a sick day](#)
- [See more](#)

TOOLS

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Pictured: The *How Do I..?* section is set up in 12 easy-to-understand categories that let employees find the information they need without having to know what department is responsible for that information.

The team encourages employees to engage with their personal profiles on the site, and has been impressed with the level of participation. In their profiles, employees can add their own language skills as well as professional associations. The team initially created a list of 50+ languages to choose from, and was impressed to see employees have added more than 40 different languages to their profiles. The team even received feedback from users who were touched to see their own languages included in the selection list, making the team's initial research in compiling a comprehensive language list worthwhile. In addition, the list of professional organizations has expanded from 66 at the time of the initial release to 116 now.

Further, junior lawyers and staff members can use the *PeopleFinder* to declare their availability by setting their status to green (able to take on more work), yellow (limited availability), or red (no spare capacity). This lets partners see who can take on more work. The system defaults to green (available) every Monday, encouraging junior employees to keep their status up to date; otherwise, they might be overwhelmed if they're already fully occupied, or miss out on an opportunity if they have free time. Availability status can be accessed and changed only by the individual (and his or her assistant).

BenNet Welcome Brian Bawden Home My Stuff Forms + Templates Web Links Blogs

MY SOFTWARE PEOPLE FINDER Ask Ben Enter search term Knowledge Bank Search

Knowledge Bank Our Teams How Do I...? CLE + Training Policies + Benefits Our Offices

WHERE AM I? Home > People Finder > User Profile

Profile

« Back



Private Notice
Associate, Toronto

PHONE
Office: 23 - 6079
Fax: 416.863.1716

EMAIL
Office: [redacted]@bennettjones.com
Other:

LOCATION
32N

WORKS WITH
Elizabeth
Assistant
Office: 23 - 4858
[redacted]@bennettjones.com

WORK AVAILABILITY
Able to Take On More Work

PRACTICE GROUPS
Commercial Litigation (Member)

PROFESSIONAL MEMBERSHIPS
Advocates Society
Canadian Bar Association
Ontario Bar Association

ROLES / RESPONSIBILITIES / SPECIAL SKILLS
Notary

ADMITTED TO PRACTICE
Ontario (2007)

EDUCATION
LLB, Ottawa U , 2006 (cum laude)
MA, Paterson School , 2006 (cum laude)
BComm, McGill , 1998 (with great distinction & dean's list)

LANGUAGE SKILLS
French (Speaks, Reads, Writes)
German (Reads)
Portuguese (Reads)
Punjabi (Speaks)
Spanish (Speaks, Reads, Writes)

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2010

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Pictured: *PeopleFinder* is more than an employee directory. Junior lawyers and staff members can set their availability using the tool, and all employees can add language skills and professional memberships to their profile information (and many have).

The team didn't forget the needs of the KM team, which is ultimately responsible for the resources on the site. When the team publishes information from the document management system to the *Knowledge Bank*, a database record is created, which allows the team to add metadata to classify documents according to the established taxonomies. Given the nature of the material, much of the categorization requires someone with a legal background. To this end, the system accommodates records that need multiple administrators.

The administration view's three panels show the *Edit* section on the left, data in the middle, and completion status and a list of tasks and comments on the right. This structure allows administrators to leave comments or tasks for the next administrator directly in the interface.

BenNet KNOWLEDGE BANK ADMIN My Site | Welcome Brian Bawden ▾

Documents Collections BenNet Books Closing Books Clause Bank Links Comments

Home > Documents > Description

Edit Document Direction to Depositary – Compulsory Acquisition –... EXIT

☒ Basic Info
☒ Origin
☒ Supplementary Info
☒ **Description**
☒ Classification
☒ Security
☐ Bibliographic Info
☐ Review
☐ See Also
☒ Endorsements

Capsule:
 Authorizes and directs Depositary to disburse to dissenting offerees payment for shares not tendered to successful take-over bid

Synopsis:
 Target corporation authorizes and directs Depositary to disburse to dissenting offerees, as payment in full for remaining shares not tendered to successful take-over bid, proceeds provided to Depositary by offeror, in accordance with CBCA Section 206(8)

Context:
 Fourth in sequence of five separate documents needed to implement compulsory acquisition of shares from dissenting offerees pursuant to Canada Business Corporations Act section 206, following successful take-over bid

Warning:
 This document was prepared for use in a cash take-over bid; appropriate modification will be required if take-over bid is not for cash only

Status (Pedigree): ☒ Model ☐ Example ☐ None

SAVE CLEAR

SECTION STATUS
 In Progress ▾

SECTION TASKS
 --Select a Task-- ▾
☒ Compose/record Context ✖
☐ Revise Warning ✖

SECTION COMMENTS
 When documents written for use with a cash-and-shares bid become available, we will need to modify the warning (and add links in See Also tab).

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BEST REPORT ON BUSINESS
Bennett Jones LLP

Pictured: The Knowledge Management team's administration tool allows multiple administrators to work on reviewing or updating information about a single document or resource. Administrators can leave notes or a to-do list of tasks that need to be completed.

The team built — through strong planning, user research, and smart, thoughtful design — not just a new intranet, but also a mission-critical work tool.

BACKGROUND

Bennett Jones built the predecessor to BenNet, the firm's first intranet, in 2000. Although the firm desired robust functionality, it had hit a wall with its current technology platform.

"In the mid-2000s, we found ourselves in a situation where we wanted to add new and more up-to-date functionality to make the intranet more interactive, but were unable to do so because of the limitations of the platform," says Brian Bawden, National Director, KM. In fact, by about 2005, the licensor of the firm's existing software stopped supporting the platform. With this as motivation, the firm began seeking alternative solutions.

"At first we directed our attention primarily at prefabricated platforms ("intranet-in-a-box")," says Bawden. "However, after carefully assessing two such solutions, we decided that we would instead go with a custom solution, designed from the ground up to fit our firm and the way we do things, rather than acquire a prefab platform and try to fit the firm into the software."

Choosing "build" over "buy" was especially important for serving the firm's key revenue producers: attorneys. This approach was much more likely to give them ready access to the resources they need to properly service clients. And perhaps just as important, by designing and coding a custom platform, the firm was assured more control over the platform in the future. By deciding to build their own platform the team would be able to expand and improve the platform incrementally over time with no restrictions on features of functionality.

The platform on which they built the new intranet was based primarily on SharePoint technology, a choice guided by two critical data points.

"Firstly," says Bawden, "SharePoint is not likely to disappear any time soon, and secondly, as a widely-used Microsoft product, there will be a significant developer community for the foreseeable future."

The resulting BenNet platform was a far cry from the 10-year-old predecessor it replaced.

TIMELINE

INTRANET TIMELINE	
Milestone Date	Milestone Description
Pre-2000	Pandell, the organization's first intranet implementation
2000-2010	BenNet (1.0)
January 2008	Most recent redesign begins
February 2010	BenNet (2.0) launches simultaneously in all four firm offices

INTRANET TEAM



Pictured: The BenNet team: (top row, left to right) Shelagh Mikulak, Brian Bawden, and Adeniyi Adebayo of Bennett Jones; (row two, left to right) Kathleen Moynahan, Ben Skelton, and Bryanne Philibert of Habañero Consulting; (row three, left to right) Akiva Bernstein and Matt Stark of V51 Consulting; (bottom row, left to right) Gerrick Denton and Howard Russell of RBRO.

GOVERNANCE

Ownership

Ownership for BenNet lies with the firm's Chief Administrative Officer.

Two regional Intranet Coordinators, each responsible for two of the firm's four offices, manage BenNet's administrative modules on a day-to-day basis.

The KM team manages BenNet's KM modules, including the *Knowledge Bank* and practice group home pages. Each lawyer on the KM Team (currently there are three) has liaison responsibility for specific practice groups.

Bawden says the division of responsibility seems to work well for the firm.

BENNET TEAM RESPONSIBILITIES	
Role	Responsibilities
Steering Committee	• Provide overall governance and direction • Responsible for future development and enhancement
Change Advisory Team	• Review, assess, and prioritize proposed bug fixes and enhancements • Report to Steering Committee
IT Department	• Provide internal project management • Coordinate with external developers • Oversee deployments of bug fixes and enhancements • In process of assuming greater development role from external developers
Admin Team	• Provide oversight of admin content and admin department pages
Content Owners (Admin)	• Update their sections and ensure consistency • Delegate some updates and changes to other members of the team/department
KM Team	• Provide oversight of KM content and practice group home pages
Practice Group Coordinators	• Work with KM Team to facilitate practice group's use of BenNet functionality
Curators (Practicing lawyers)	• Keep one or more Knowledge Bank resources current

USERS

Everyone in the firm uses BenNet. This includes approximately 925 staff members, of which more than 400 are legal professionals. These users can be divided into the following groups:

- **Legal professionals:** Provide legal services to clients of the firm. Includes lawyers (partners, associates, and counsel), patent and trademark agents, paralegals and law clerks, articling students (graduate lawyers serving what is basically an apprenticeship), and summer students (students who have completed a year or more of their three-year law degree)
- **Managers:** Manage firm's various administrative departments, including Systems, Accounting, HR, and Marketing

- **Assistants:** Provide secretarial and administrative services to legal professionals and managers
- **Support Staff:** Work in the various administrative departments

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
Default Status	BenNet is set as each user's home page. Users can reset their home pages to something else, but the BenNet setting is persistent; when they log in again, the home page reverts to BenNet.
Remote Access	Users can access BenNet remotely using Citrix (secure login). This is an important feature as lawyers and senior managers frequently work from home — especially in the evening and on weekends, and when they travel.

DESIGN PROCESS AND USABILITY WORK

Project Goals

To understand the Bennett Jones intranet's evolution, it's important to understand the overarching goals that guided the project. These included:

- Foster the creation of a cohesive culture across all offices of the firm. This was especially critical because the firm had seen considerable growth, especially in its Toronto office, which had grown from 80 to 350 staff members since 2002.
- Assume a leadership position in technology use in the practice and business of law. This goal was aimed at meeting imperatives that firm leaders felt were most meaningful to its clients: responsiveness in the delivery of truly excellent advice and work product, coupled with greater efficiency and cost-effectiveness.
- Capture and preserve the firm's knowledge capital.
- Attract (and keep) the best and brightest lawyers.
- Compete with other law firms.
- Replace an existing intranet that no longer met the expectations of the firm and its personnel.

A Custom Approach

Prior to the redesign project the firm reviewed at least two off-the-shelf intranets, generically designed for law firms. The team quickly decided to design a custom intranet to fit the organization's specific needs rather than force the firm to fit into a prefabricated intranet product. So, the new BenNet was designed from the ground up to meet the firm's requirements.

It was built in SharePoint 2007 and integrated with several databases (including WorkSite, a third-party document management system). The firm used three outside

developers (described in more detail below) to assist with the effort and split the project into three phases.

"Phase One was ambitious," says Bawden, "in that we insisted upon including a number of interactive features designed to emphasize knowledge sharing and encourage broad participation from the outset."

Unfortunately, in law firms — as in other organizations — considerable activity and effort are often expended to aggregate various knowledge resources into repositories, but once that is done, the repositories often lie fallow.

"Knowledge, however, is a wasting asset," says Bawden. "Without the means to keep those repositories current, they quickly become what one expert has dubbed 'knowledge landfill.' Our mantra was that knowledge sharing and use of BenNet needed to become 'part of the culture, part of the routine' and those interactive features were an essential part of making that happen."

With that in mind, the team spent a fair amount of time in requirements gathering.

"Our greatest challenge was controlling the flow of great ideas," says Bawden, "which can of course lead to 'scope creep' and delay of launch. It's always important to remember, as Voltaire said, 'Perfect is the enemy of good.'"

Partnering with Outside Agencies

The firm partnered with a few outside agencies to augment its internal team's expertise. Each agency was chosen to fulfill a specific project need and worked closely with the internal Bennett Jones team to ensure adherence to the project vision.

"We recognized the complexity of the project from the outset and each agency had its primary role," says Bawden. "We started almost simultaneously with V51 and RBRO, and engaged Habañero within a few months of project inception following a search for a top-tier user experience design firm."

The partner agencies for the project included:

PARTNER AGENCIES/RESPONSIBILITIES	
Agency: Habañero Consulting Group	
Overview	Habañero Consulting provided user experience design (IA, user interface design, usability testing, and related requirements gathering) and intranet governance consulting.
User Experience Consulting	The project followed Habañero's recommended user-centered design process. The internal team liked the fact that there was user involvement throughout the process, and there was close collaboration among the agency, the internal team, and end users throughout the project. "The research was incredibly important as it allowed us to grasp the cultural differences between the different offices, and determine how the intranet could make the lives of people at Bennett Jones easier," says Ben Skelton, Partner and Practice Leader, Websites and eCommerce (Habañero Consulting Group). "I also really enjoyed our four-hour review sessions — we don't often have the opportunity to collaborate with a client so closely on the design, which was a really intense, yet satisfying experience."
Agency: V51 Consulting	
Overview	V51 provided technical consulting and SharePoint development (solution architecture, technical design, development, and quality assurance) and led the requirements gathering, IA, and functional specifications for knowledge management modules (for example, <i>Knowledge Bank</i> and practice group home pages).
SharePoint Consulting	V51 Consulting was engaged to define and document the KM module requirements as well as to develop the entire intranet in SharePoint. The internal team spent several months working very closely with V51 to analyze the firm's knowledge management requirements. Following these KM workshops, V51 developed detailed wireframes for all KM modules (more than 300 pages). Habañero Consulting worked closely with V51 by providing heuristic reviews and feedback that went into the final revisions of the KM wireframes. With the exception of one portal section (forms and templates), all of the technical SharePoint development was outsourced to V51.
Agency: RBRO Solutions	

Overview	RBRO Solutions provided integration between the iManage WorkSite Document Management System (DMS) and the portal's <i>Knowledge Bank</i> Admin module.
Document Management System (DMS) Integration	RBRO's role was to work closely with the KM Team and the Firm's IT group to build a framework that enabled both users and knowledge workers to quickly identify important documents and easily submit them for review and potential publication to BenNet. The RBRO Team worked closely with V51 to develop a Web service synchronization process between the iManage WorkSite DMS and the portal's <i>Knowledge Bank</i> Admin module. Key outcomes from this activity included: • Seamless integrations into the DMS that let users tag documents for submission. The process enforced the inclusion of the metadata required to make the documents relevant to other consumers. The system also ensured that users submitted only content that they were authorized to submit for inclusion in the portal experience. • A governing process, which ensured that ethically controlled documents from the live system were properly secured until vetted and cleaned by KM lawyers. • A synchronization process that communicated directly with the BenNet portal. • Link technology that let portal users obtain documents directly from the DMS via the portal. This let the firm maintain a usage history for WorkSite-based content via the DMS' core systems.

Usability Activities

With Habañero Consulting's assistance, the internal team conducted several research activities throughout the project. These included:

- **Beta testing of new design.** The intranet was first tested with a group of approximately 90 users in three of the four offices (all of the articling students and selected admin personnel) before it was released to the whole firm.
- **Card sorting.** Card sorts were conducted with various members of the firm to help determine the overall intranet structure. The card-sorting exercise also let the team explore the different content types and functionality that a user might expect to find under each label. Through this process, they were able to test and refine the proposed global navigation labels.

The intranet team also completed an internal card-sorting exercise to help determine the detailed structure of the *How Do I...?*, *Policies + Benefits*, and *Forms + Templates* modules.

- **Checking server logs or usage stats.** The team conducted a review of available server logs and analyzed usage statistics to inform some of their design decisions.
- **Field studies (visiting and watching people in their workplace).** Team members conducted a series of one-on-one interviews with partners, associates, administrative staff, and articling students across the firm. The interviews were conducted in Edmonton, Calgary, and Toronto in boardrooms and occasionally in individual offices or workstations.
- **Researching usability or design through books, reports, or other resources.** The team consulted the NN/g *Intranet Design Annual* and other published research to learn about best practices in intranet design. They also relied on the accumulated knowledge of the Habañero team, which specializes in intranet design.
- **Usability testing of design prototypes.** The team conducted usability testing in-person in Toronto; they chose that office because the card-sorting exercises had been done in Calgary.

Features for Work

The result of all of this user involvement and research is an array of features that closely match the work habits of the firm's employees. And, perhaps most importantly, the feature set helps employees enhance their interactions with other team members. The examples below illustrate different aspects of that collaborative work environment in action.

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[WHERE AM I?](#) [Home](#) > [Our Teams](#) > [Practice Groups](#) > [International Trade](#) > [Blog](#) > Blog Post

Policy Review – Foreign Investment in the Book Industry

« [Back](#)

 Sep 20, 2010 at 01:15pm  Posted By: [Brian](#)  Time: [EST](#) 

Quick recap on where this Policy Review stands:

As you no doubt recall, the Minister of Canadian Heritage and Official Languages issued a discussion paper on July 22, 2010, entitled Investing in the Future of Canadian Books (document [here](#)) as a kick-off for a review of the current policy (document [here](#)) that has been in place since 1992.

The initial phase solicited the views of stakeholders, referencing a questionnaire included in the discussion paper. The cut-off date for stakeholder submissions was September 18th.

Stakeholder submissions will be posted on the [web site](#) (apparently not until October), which will enable the second phase, in which both the general public and stakeholders can comment on submissions. Comments will be accepted until October 31.

According to the web site, "key stakeholders will be invited to take part in roundtables to be held in late 2010, and a ministerial decision on whether, and if so, how, to revise the policy is expected in 2011".

COMMENTS

 [Milos](#)  [\[redacted\]](#)

 Sep 21, 2010 at 11:14am

FYI, we recently assisted a client, [\[redacted\]](#), with regard to its submission in connection with this consultation. It is probably worth discussing briefly at a future Competition Group meeting.

 **Add Your Comment**

[SUBMIT](#)

Your comments will be displayed along with your name.

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 **Bennett Jones** LLP

Pictured: Blogging is completely open at the firm. Anyone can start a blog or read and comment on any other. With 45 already in play, the tool has become a primary vehicle for communication and knowledge sharing at the firm. The firm so strongly supports blogging that it encourages users to think of the blog as a substitute for email conversations intended for a large audience or community of practice. In a legal environment such as theirs, the Bennett Jones users engage in blog conversations around important cases or new legislation, disseminate best practices, review new precedents, and so on. It makes sense to put these discussions in blog format as blogs are fully searchable and entries never disappear. To accommodate users who are less technologically inclined, the team also provides simple widgets that let users post blog entries, subscribe to notifications, and cross-post to multiple blogs.

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Knowledge Bank **Our Teams** How Do I...? CLE + Training Policies + Benefits Our Offices

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CORPORATE COMMERCIAL

GROUP MEMBERS
MEETINGS & EVENTS
PROJECTS & INITIATIVES
GROUP PUBLICATIONS
KNOWLEDGE BANK FAVOURITES
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BLOG

Corporate Commercial << Back

Our group's lawyers help clients create, assess, evaluate and maintain their business organization, advising on director and officer liability issues, negotiating and preparing documentation for contracts, agreements and business financing transactions of all types, and counselling on business issues ranging from asset management to corporate expansion. We also help facilitate the provision of routine services for our clients with the firm's corporate records department. In particular, our group's practices include leveraged buyouts, recapitalizations and restructurings, private equity fund formation and the establishment and representation of investment funds.

GROUP LEADERS

Bryan
Partner
Calgary
25 - 3162

Gary
Partner
Toronto
23 - 6555

MEETING DATES
Feb. 3/10
Apr. 7/10
Jun. 2/10
Sep. 1/10
Nov. 3/10
Dec. 1/10

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RECENT BLOG POSTS Time EST

New not-for-profit standards proposed
Apr 07, 2010 at 8:54am Posted By: Jane 0 Comments

The Deal Professor
Feb 28, 2010 at 12:50pm Posted By: Brian 0 Comments

Nixon Peabody's 2009 Annual MAC Survey
Feb 28, 2010 at 12:40pm Posted By: Brian 0 Comments

[Visit the Corporate Commercial Blog](#)

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BEST
IN CANADA
2010
REPORT ON BUSINESS

Bennett Jones LLP

Pictured: The landing page for one of BenNet's 44 team workspaces — in this case, a lawyers' practice group. The left-hand navigation links to information relevant to the team workspace and supports collaboration among teams. This provides a simple means to cross-post meetings and events, projects and initiatives, and blog postings.

BenNet Welcome Brian Bawden Home My Stuff Forms + Templates Web Links Blogs

MY SOFTWARE PEOPLE FINDER Ask Ben Enter search term Knowledge Bank Search

Knowledge Bank Our Teams How Do I...? CLE + Training Policies + Benefits Our Offices

WHERE AM I? Home > People Finder > User Profile

Profile

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Brian Bawden
National Director, Knowledge Management, Toronto

PHONE
Office: 23 - 6076
Fax: 416.863.1716
Mobile: 416.410.0599

EMAIL
Office: BawdenB@bennettjones.com
Other:

LOCATION
31W

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DEPARTMENT
Knowledge Management

PROFESSIONAL MEMBERSHIPS
• Canadian Bar Association
» [Edit Membership](#)

ROLES / RESPONSIBILITIES / SPECIAL SKILLS
• Senior Management Team

COMMITTEES
• Information Technology (Office)

ADMITTED TO PRACTICE
• Ontario (1977)

EDUCATION
• LLB, Western , 1975
• BSc, Western , 1972

LANGUAGE SKILLS
» [Edit Languages](#)

LANGUAGE	READ	WRITE	SPEAK
Swedish	☒	☒	☒
Icelandic	☒	☒	☐
Danish	☐	☐	☒
Select Language...	☐	☐	☐
Select Language...	☐	☐	☐
Select Language...	☐	☐	☐
Select Language...	☐	☐	☐
Select Language...	☐	☐	☐
Select Language...	☐	☐	☐
Select Language...	☐	☐	☐

[SAVE](#) [CLOSE](#)

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BEST REPORT ON BUSINESS 2010 **Bennett Jones**

Pictured: The *PeopleFinder* feature lets employees easily indicate the languages they read, write, and speak. To date, 40 languages have been declared, making the firm more multicultural than the firm realized prior to having this snapshot. Firm members have even been “genuinely touched” to find their languages on the list, making the team glad they did their homework in compiling the master list, which offers more than 50 languages.

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[FAQ](#)

[MY SOFTWARE](#)
[PEOPLE FINDER](#)

Ask Ben

[Knowledge Bank Search](#)

[Knowledge Bank](#)
[Our Teams](#)
[How Do I...?](#)
[CLE + Training](#)
[Policies + Benefits](#)
[Our Offices](#)

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[Projects & Initiatives](#)
[New Alberta Rules of Court and Forms 2010](#)

New Alberta Rules of Court and Forms 2010

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The new Alberta Rules of Court and related Forms come into effect on November 1, 2010. This project will provide litigation lawyers with a guide to the new Rules and Forms, including forms prescribed by statute and other best-practice precedents.

CONTACT(S):
[Sonya](#), [Blair](#), [Scott](#)

PARTICIPANTS:
[Jonathan](#), [Marv](#), [Richard](#), [Valentina](#), [Dan](#), [Russell](#), [Mary](#), [Michelle](#), [Alexis](#), [Coral](#), [Wanda](#), [Aldona](#), [Duncan](#), [Tariq](#), [Steve](#), [Shawna](#), [Sonya](#), [Blair](#), [Scott](#)

Action	Date	Details
New Rules Seminar for Assistants – Part 2 of 2	Nov 22, 2010	Part 2 of internal seminar for litigation assistants, also presented on November 19 – see Meetings & Events for details
New Rules Seminar for Assistants – Part 2 of 2	Nov 19, 2010	Part 2 of internal seminar for litigation assistants, also presented on November 22 – see Meetings & Events for details
New Rules Seminar for Lawyers – Part 2 of 2	Nov 12, 2010	Internal CLE on new Rules of Court for Alberta litigators – see Meetings & Events for details
New Rules Take Effect	Nov 01, 2010	New Rules apply, and new Forms must be used, from and after Monday, November 1, 2010
New Rules Seminar for Assistants – Part 1 of 2	Oct 22, 2010	Internal seminar for litigation assistants, also presented on October 18 – see Meetings & Events for details
New Rules Seminar for Assistants – Part 1 of 2	Oct 18, 2010	Internal seminar for litigation assistants, also presented on October 22 – see Meetings & Events for details
New Rules Seminar for Lawyers – Part 1 of 2	Oct 12, 2010	Internal CLE on new Rules of Court for Alberta litigators – see Meetings & Events for details
Rules Published in Alberta Gazette	Aug 14, 2010	Last official step prior to coming into force – publication of Rules, in final form, in Alberta Gazette
Rules of Court issued as Regulation	Jul 19, 2010	By authority of Order in Council O.C. 256/2010, Rules of Court formally issued as Regulation A.R. 124/2010 under Judicature Act
Initial Meeting	Feb 01, 2010	Bennett Jones Rules of Court Project kick-off meeting and planning session

RELATED DOCUMENTS

- Rules of Court Project – ALRI Final Report No. 95 (PDF)
- Recent Amendments to Civil Enforcement Regulation (DOCX)

RELATED LINKS

- » [Alberta Law Reform Institute > Rules of Court Project](#)
- » [LESA Rules of Court Blog](#)

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Pictured: Project details for a significant and impending change of court rules affecting the Firm’s Alberta offices. The project was created in the *Projects & Initiatives* section of the Commercial Litigation practice group’s homepage and cross-posted to the corresponding section on the homepages of other affected practice groups. Identifying the initiative in this way, for all to see, reassures those affected that the firm will be ready by the time the changes take effect, and allows interested parties to become involved.

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PEOPLE FINDER

Ask Ben

Knowledge Bank Search

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WHERE AM I?
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[How Do I...](#) >
[File + Document Management](#) >
[Manage conflicts and secrets](#) >
Identify a legal or business conflict

HOW DO I...

File + Document Management

- » Manage conflicts and secrets
- » Open a file
- » Deal with documents
- » Close a File
- » Use Referral Management
- » Manage files sent to Storage

Accounting
Technology
Practice Support
Research
After Hours
Meetings
Safety, Security + Health
Office Services
Marketing
Travel
Career + Employment

Identify a legal or business conflict

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There are different types of conflicts to consider before opening a file and accepting the retainer.

NATIONAL

There are different types of conflicts to consider before opening a file and accepting the retainer.

- Loyalty**

A lawyer and the Firm cannot act against the immediate interests of a current client without consent, even where the retainers are unrelated (*R. v. Neil*, [Conflict Policy](#) page 2).

Example: Acting on a collection matter against a company for which we have an open, although insignificant, patent file.
- Confidential Information**

A lawyer and the Firm cannot act against the interests of either a current or a former client where the lawyer or the Firm possesses relevant information obtained from a solicitor/client relationship, which could, in the new retainer, be used to the prejudice of the former client (*Martin v. Gray*, [Conflicts Policy](#), page 3).

Examples: [Corporate](#) - Having acted for one party in developing a joint venture agreement many years previously, now acting for another party to that agreement with respect to a dispute arising under that agreement.

[Litigation](#) - Taking proceedings against an individual where we had, some years previously, acted on estate planning work for the individual such that we knew his assets and liabilities.
- Business Conflict**

A business conflict is one where, there being no loyalty conflict or confidential information conflict, the Firm, for business reasons, may not wish to accept the new retainer.

Examples: Accepting a small retainer which would preclude the Firm from accepting a larger retainer with respect to the same subject matter. This situation arises when the Firm is asked to act for an Independent Committee or a Financial Advisor where a major corporate sale is in process and where existing clients of the Firm may be candidates to acquire the business. Another example is bringing a lawsuit against the president of a corporate client.

For more information on identifying and resolving a business conflict, see [Related Links](#).

Last updated on Monday, Dec. 07, 2009 at 11:49:19 AM

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RELATED LINKS

- » [Conflicts Policy](#)
- » [How do I... Identify and resolve a business conflict](#)
- » [Conflicts Committee](#)

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Questions?

Please contact:

Brad
25 - 3194

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BEST OF BUSINESS 2010 REPORT ON BUSINESS

Pictured: An example of *How Do I...?* content — in this case, how to identify a legal or business conflict. In addition to the explanation in the central panel, a *Related Links* widget in the right-hand panel lets users quickly find related policies and other content. There's also a *Questions* widget that identifies the page's owner, to whom inquiries may be directed.

CONTENT AND CONTENT CONTRIBUTORS

Content management is split into two different processes to accommodate the two types of content housed in BenNet: KM content and administrative content. These content types are not only distinctly different, but are dealt with in distinctly different ways by two different teams.

KM Content and *Knowledge Bank*

"KM content" generally refers to the practice resources that the firm's legal professionals use every day to practice law and service clients. The KM team is responsible for gathering, processing, and publishing this content. Immediate access to the KM is considered mission-critical to the firm.

This content serves the particular needs of the legal professional, whatever those needs might be in the specific instance. And these resources are housed in a system of repositories in BenNet's *Knowledge Bank* module and include:

- **Precedents:** Models or examples of contracts, court documents, and other drafting resources used as starting points to document new transactions or proceedings.
- **Research:** Internal memoranda and other literature that discuss and analyze interesting or difficult points of law.
- **Clauses:** Model language for specific provisions of contracts or other legal documents.
- **Firm Publications:** Updates and alerts sent to clients, as well as articles, papers, and speeches by members of the firm.
- **BenNet Books:** Selected *Knowledge Bank* resources, from the *Precedents*, *Research*, *Clauses*, and *Firm Publications* repositories, assembled into a familiar book metaphor with optional added narrative. *Knowledge Bank* also includes direct access to the catalogue for the firm's four library collections of print and electronic resources.

KM Content Management

The primary contributors of *Knowledge Bank* content are the legal professionals themselves. To facilitate the contribution process, a *Share Your Work* widget is prominently displayed in various *Knowledge Bank* locations.

In response to suggestions from users, the team will be adding this widget to the BenNet home page as well. The *Share Your Work* widget creates a workflow that lets users submit content electronically and, at the same time, provides the KM Team with basic but essential information (metadata) about the content being submitted.

Parsing the Contributions

Not every contribution, however, is accepted for publication in *Knowledge Bank*. The *Knowledge Bank* was designed to be a "premium" content collection, meaning that content is accepted only if a subject matter expert of suitable seniority vouches for it. This helps to ensure quality and consistency of new work product.

"To that end," says Bawden, "we track who submits the content and, before the content is published to the *Knowledge Bank*, a member of the KM team confirms that

the submitter is a subject matter expert in regard to the content submitted. If not, the content is routed to a subject matter expert for review prior to publication.”

“The process is not as onerous as it sounds,” he says. “If a partner in the Employment practice group sends us an employment contract, we publish it to *Knowledge Bank*. If a Tax partner sends us an employment contract, we ask an Employment partner to review it before we publish it.”

To acknowledge contributions and provide feedback to content contributors, the KM team advises contributors whether their contribution has been accepted for publication (and if not, why not). For contributions that are accepted, contributors are apprised as to how the document or clause has been described and classified so that they can correct any errors or suggest improvements.

The result is that the KM team must work closely with practice groups and individuals, on an ongoing basis, to generate contributions of premium content and assemble related content into *BenNet Books*.

Contributions that are accepted are copied into a separate WorkSite library that was created for this purpose, and from there are published to *Knowledge Bank* using a specially designed Web service (described below).

According to Bawden, using WorkSite offered many benefits, including that it let them track any circulation restrictions — or *firewalls* — both before and after publication to *Knowledge Bank*. Using WorkSite also let them create the unique *Find the Children* mechanism (described below).

In that separate library, called DMS-KM, default access is read-only. However, because WorkSite is accessible to all personnel, the team was able to institute a “curator” program, granting edit rights to specific documents to individuals who accept responsibility, for a specified period of time, to keep those documents up-to-date.

Due to certain WorkSite limitations, users might not be able to add all of the metadata or use all of the taxonomies selected by the team to classify the documents (type of transaction, jurisdiction, and so on). To address this, they carry out these activities at the SharePoint/*Knowledge Bank* level, using a module that the team developed called *Knowledge Bank Admin*.

DMS-KM and *Knowledge Bank Admin*

One of the firm’s partner agencies, RBRO, was tasked with helping the Bennett Jones team develop a framework that would enable the firm’s KM lawyers to quickly identify important documents and easily submit them for review and potential publication to BenNet. The RBRO Team worked closely with V51 to develop a Web service synchronization process between the iManage WorkSite DMS and the portal’s *Knowledge Bank Admin* module. The key outcomes from this effort included:

- **Seamless integration** with the DMS that lets users tag documents for submission. The process also enforces inclusion of the metadata required to make the documents relevant to other consumers of the information. In addition, the system ensures users submit only content that they’re authorized to submit for inclusion on the portal.

- **A governing process** that ensures that ethically controlled documents are properly secured from the live site until they are vetted and sanitized, if necessary, by the firm's KM lawyers.
- **A synchronization process** that communicates directly with the BenNet portal.
- **Link technology** that lets portal users obtain documents directly from the DMS. With this, the firm can maintain a history of usage of WorkSite-based content via the DMS' core systems.

"The challenge of any great system," says Russell, "is to provide the average user with a simple method of submitting valuable content for the benefit of themselves and others." And this system accomplishes that in spades.

KM lawyers also have a critical function: to identify and label content that others create and augment the mix of valued assets.

"The way in which the DMS was integrated with *Knowledge Bank Admin* met that challenge," says Russell.

Once the DMS was integrated with the *Knowledge Bank Admin*, rolling it out to users was simple. The DMS was already front and center, on each user's desktop. Given their pre-existing comfort level with that aspect of the tool, even less technical users could take part in the knowledge-sharing process right away. This, in turn, led to wider adoption in less time.

"For example," says Bawden, "the success of the Curator program depended on the seamless integration achieved with the DMS."

Outside of the obvious knowledge-sharing benefits of the DMS and *Knowledge Bank* integration, the marriage of the two systems offered the firm other critical, yet ancillary benefits. These included helping the firm identify "children" and facilitating the Curator program. These functions are described below:

- ***Find the Children***

In the ordinary course of the firm's business, precedents and other *Knowledge Bank* documents are copied and modified to create new documents, and the newly created documents, or *children*, are saved to WorkSite, the Firm's DMS.

Taking advantage of complete integration between BenNet and the DMS, the *Find the Children* feature can, at any point in time, identify all of the DMS documents that have been created from precedents and other *Knowledge Bank* documents, based on unique codes embedded in each knowledge resource in *Knowledge Bank* resource.

"This ground-breaking mechanism enables us to not only track actual usage of knowledge resources," says Bawden, "but to learn from it by comparing the children to the parent, and continuously feed improvements back into the system, achieving a critical goal that has long eluded KM practitioners."

- ***See Also***

Similar to the comment-and-notification mechanism, each *Knowledge Bank* resource has a *See Also* section associated with it. This information is used to record links to related documents, blog postings, CLE programs, and/or other background material that might be helpful in facilitating the document's proper use.

- **Curators and Periodic Review**

Significant documents in *Knowledge Bank*, such as model precedents, might be assigned a "curator" who is responsible, for a specified time period, to keep that document up-to-date, taking into account such things as new legislation and court decisions. A curator might be an established expert or a junior lawyer who will develop greater expertise in the particular subject area as a result of being appointed a curator. The curator's identity is displayed with the document so that others know who has that responsibility. The curator will also be notified, along with the KM Team, of any comments posted on that document.

When the curator or other senior lawyers undertake a review of a *Knowledge Bank* document, the date, reviewer names, and any relevant particulars are then displayed with the document.

Administrative Content

The other content type is referred to as administrative content: useful information about the firm, its offices, policies, programs, procedures (including necessary forms and workflow), benefits, history, news, and so on.

Contribution and management of administrative content is done on the basis of distributed responsibility, and each and every admin page has an owner. On most pages, the owner is identified with contact particulars.

TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and O/S	Hardware: - ESX VSphere 4.0 Enterprise Edition Virtual Server with dedicated Intel Xeon CPU E7440 @ 2.4Ghz (2 processors) 4 GB of RAM O/S: - Windows Server 2008 R2 Standard
Bug Tracking/Quality Assurance	Bugzilla as the primary system to log both feature requests and bugs
Design Tools	Adobe Fireworks
Site Building Tools	MOSS 2007 Enterprise Edition
Content Management Tools	- MOSS 2007 Enterprise Edition - iManage WorkSite DMS (extended by RBRO to push content to SharePoint — see Part I for a description of DMS-KM and its relationship to Knowledge Bank Admin)
Search	MOSS 2007 Enterprise Search
Other Functions	At the suggestion of V51, the team used Basecamp, an online project management tool, to foster communication among teams, track issues, and share files

MOBILE

Mobile access is limited for BenNet. And, like many large organizations experimenting with mobile intranet access, Bennett Jones is taking a watch, learn, and implement-in-stages approach.

“For the first phase of BenNet, we made sure that our users could access the blogs and post comments on blog postings from their BlackBerrys,” says Bawden. “But we did not create a mobile version of the site for the first phase. Our plan is to observe how our users are using the site and, based on that information, to add mobile capabilities in a later release for some key mobile scenarios.”

SEARCH

The portal contains several search interfaces, including:

- A general portal search, known as *Ask Ben*, designed to help users find administrative content
- *Knowledge Bank* search tools that help lawyers locate legal knowledge sets
- A *PeopleFinder* search tool

Ask Ben

Ask Ben is configured using MOSS 2007 Enterprise Search. Currently, this is searching content only in SharePoint site collections. The team configured keywords and best bets to promote content that absolutely must be found. For users who still like to find KM content in *Ask Ben*, they provide one-click links to execute those searches in the *Knowledge Bank* search.

BenNet [Welcome Brian Bawden](#) [Home](#) [My Stuff](#) [Forms + Templates](#) [Web Links](#) [Blogs](#) [Site Actions](#)

[MY SOFTWARE](#) [PEOPLE FINDER](#) [Ask Ben](#) [GO Knowledge Bank Search](#)

[Knowledge Bank](#) [Our Teams](#) [How Do I...?](#) [CLE + Training](#) [Policies + Benefits](#) [Our Offices](#)

[WHERE AM I?](#) [Home](#) > [Ask Ben Search](#)

Ask Ben for "BlackBerry"

Knowledge Bank

- » Search precedents for "BlackBerry"
- » Search research for "BlackBerry"
- » Search clauses for "BlackBerry"

1 2 3 4 5 6 [Next](#) » Results per page: 10

Use Phones and Blackberries **BEST BET**

[Home](#) > [How Do I...?](#) > [Technology](#) > [Use phones and blackberries](#)

Blackberry Usage and Security Policy **BEST BET**

[Home](#) > [Policies + Benefits](#) > [Policies](#) > [Technology](#) > [Blackberry Usage and Security Policy](#)

Calling Card Policy **BEST BET**

[Home](#) > [Policies + Benefits](#) > [Policies](#) > [Technology](#) > [Calling Card Policy](#)

Blackberry Contact and Plan Information **BEST BET**

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Workflow Management Systems

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Crossing the Border with Laptops – Some Tips

Sep 07, 2009 at 04:45pm | Brian Bawden

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1 2 3 4 5 6 [Next](#) » Results per page: 10

SEARCH TIPS

- Ask Ben DOES NOT SEARCH Knowledge Bank, Weblinks or PeopleFinder
- Expand your search by using a comma to indicate OR
- Narrow your search by entering two or more words; a space = AND
- Exact phrases are searched by using " "
- Plurals are NOT assumed

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BEST EMPLOYER IN CANADA 2010 REPORT ON BUSINESS

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Pictured: A search results page, including best bets, of an employee search for the term "Blackberry" using the *Ask Ben* search feature. *Ask Ben* is another example of the user-centric approach to finding intranet information. Search tips are prominently displayed, as are links to *Knowledge Bank* searches for the same topic.

Knowledge Bank Search

Unlike *Ask Ben*, the *Knowledge Bank* search is more customized to the organization's needs.

"*Knowledge Bank* search is much less out of the box," says Bawden. "The majority of content in *Knowledge Bank* is stored in document libraries with a fair bit of metadata including hierarchical taxonomies not fully supported by MOSS 2007."

When a user executes a keyword search in *Knowledge Bank*, the search is executed across multiple content types, using different search scopes for each content type and targeting different metadata depending on the type. Results are displayed either by date or relevance or some other criteria depending on the content type. Copies of documents from the enterprise DMS are also stored in SharePoint and indexed for search purposes.

"With *Knowledge Bank*, as indicated, we implemented faceted classification in combination with search," says Bawden. "Interestingly, the most efficient means of finding a precedent is to begin with faceted classification (for example, choose a type of agreement), and apply other filters as applicable, using full text search if needed only as a last resort."

Conversely, the most efficient means of finding an article, memo, or other research item or firm publication is to begin with full text search, using faceted classification only as a last resort. However, this approach is not the most obvious path, and team members know they need to work on this.

"We think we will need to adjust the interface to make this more obvious," he says.

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WHERE AM I?
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Precedents
Results

NARROW RESULTS BY:

DOCUMENT TYPE

- Agreement / Undertaking

TRANSACTION TYPE

- Emissions Trading

AREA OF LAW

JURISDICTION

EXAMPLE / MODEL / COLLECTION

Results

24 RESULTS
Sort By Rank

1 2 3 Next »
Results per page 10

Agency ERPA – CERs from CDM – *Harvesting Model*

Jurisdictions Internal Example October 03, 2008
More Info

Agent purchases Certified Emission Reductions generated from Clean Development Mechanism project for prospective buyers, identities to be determined

Escrow Agreement – Closing Escrow – *Example*

Jurisdictions Internal Example September 10, 2008
More Info

Bennett Jones to act as escrow agent for client. Sets out responsibilities and conditions that are required to act as agent.

Performance Guarantee – CER Purchase Transaction – *Example*

Jurisdictions Internal Example September 09, 2008
More Info

Parent guarantees subsidiary's obligations to New Buyer in transaction in which subsidiary sells Certified Emissions Reductions to New Buyer

Harvesting Contract – Carbon Credits – *Example*

Jurisdictions Internal Example September 03, 2008
More Info

Establishes system for creating carbon credits in anticipated compliance markets through use of Nitrogen Tire Injection Program

Emissions Reduction Purchase Agreement – VER Offsets – *Example*

Jurisdictions Internal Example August 01, 2008
More Info

Provides for purchase and sale of Voluntary Emission Reduction offsets from 2007 and for offsets from 2009 – 2013

Project ERPA – Canadian Compliance Credits & VERs – *Example*

Jurisdictions Internal Example July 22, 2008
More Info

Provides for purchase of emissions reductions, buyer may purchase additional credits produced in year beyond Annual Offset Quantity and has right of first offer and refusal

Master Agreement – New Buyer Arrangements – *Example*

Jurisdictions Internal Example July 01, 2008
More Info

Enables new buyer to acquire Contract CERs (certified emission reductions) from current buyers who reduce their proportionate share

Confidentiality Agreement – Purchase of Contract CERs – *Example*

Jurisdictions Internal Example July 01, 2008
More Info

Forbids buyer to divulge information concerning its purchase of Certified Emission Reductions from current buyers

Confidentiality Undertaking – New Buyer – *Example*

Jurisdictions Internal Example July 01, 2008
More Info

Requires New Buyer to keep confidential all information received about operation of UCF (Umbella Carbon Facility) transaction

New Buyer Purchase Agreement – Certified Emission Reductions – *Example*

Jurisdictions Internal Example July 01, 2008
More Info

Provides for new Buyer's purchase of proportionate share of CERs acquired by Seller

1 2 3 Next »
Results per page 10

SEARCH TIPS

- Narrow your search by selecting options in the left column.
- Search within results to narrow your search ever further.
- Look for helpful icons that highlight the best resources.

TOOLS

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50th Anniversary
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Pictured: Search results in *Knowledge Bank* can be quickly refined to include only the most relevant results using a filtering control that appears in the left-hand panel. This tool has proven to be both effective and popular, as users generally need to apply only two or three filters to reduce a result set of more than 1,000 to a list of fewer than 10. In this example, the user has applied only two filters from different categories — a document type of "agreement/undertaking" and a transaction type of "emissions trading" — to reduce a long list of documents to a more manageable number, and with this narrowing in place, he can now "search within results" or apply additional filters to reduce the list even further.

PeopleFinder is configured in the same way as *Knowledge Bank* search in that it offers an intuitive, browser-refined interface.

"We anticipate we will incorporate into BenNet a more sophisticated search engine, capable of concept searching and able to apply taxonomies (for example, FAST, Recommind, or Autonomy) in the foreseeable future," says Bawden.

RESULTS AND ROI

The golden rule concerning return on investment (ROI) is: benefit is in the eye of the beholder. And nowhere is that more true than with BenNet. Sometimes intranets return quantifiable results (though not often) and sometimes they result in softer impacts such as increased use or user satisfaction. BenNet falls squarely in the latter.

"Ours is not an intranet that readily lends itself to dollars-and-cents calculations of savings or benefits," says Bawden. "Nevertheless, we believe that we have achieved an enormous return on our investment because BenNet creates a sense of community, disseminates information, and breaks down barriers of time and distance between offices — and because it has clearly been embraced by lawyers and staff alike."

"In that vein, perhaps the most immediate success of the new BenNet has been *PeopleFinder*," he says, "closely followed by *BenNet Books*, the *How Do I...?* module, and blogs." He breaks down how each of these modules has returned value for the firm as follows:

- ***PeopleFinder***

"We can see that *PeopleFinder* receives an enormous amount of use on a daily basis," says Bawden, "but our awareness of the success of *PeopleFinder* is also, in part, anecdotal."

The team has received considerable praise for *PeopleFinder's* effectiveness from personnel in all groups and departments, but most notably from busy partners (who, he says, rarely take time for such things). The tool's effectiveness extends beyond such things as staffing new projects and transactions for clients to helping users get to know their colleagues, especially in other offices.

"We have also received numerous suggestions for expanding the scope of *PeopleFinder* with additional information, which we take as an indicator of its penetration and success," he says.

One measurable way the firm can gauge the tool's success is by tracking the self-declaration of languages and professional memberships contained in the staff profiles. And that activity has yielded great results.

"Our people have declared proficiency in more than 40 different languages (other than English)," says Bawden. "And we expect that number will increase somewhat — perhaps to as many as 45. For professional memberships, we started with a pick list of 66 professional organizations, which has increased to 116 as a result of requests from users who wished to declare their memberships in organizations that were not initially on the list."

- ***BenNet Books***

BenNet Books is a big hit at the firm.

"The introduction of *BenNet Books* has caused considerable excitement amongst the lawyers," says Bawden. "We now have 34 books published and many more in preparation. We expect the pace of creation of *BenNet Books* to quicken, as more people see them and realize the possibilities."

BenNet Books might be described as a successful marriage of traditional KM material with context and process, with the result that the firm can deliver workplace learning while facilitating creation of work products that are consistently of the highest quality.

"*BenNet Books* moves us measurably closer to the ultimate goal of knowledge sharing — that 'we all know what we each know,'" he says, adding that "one of the interesting observations about *BenNet Books* is that, instead of the traditional approach of submitting one precedent at a time, contributors are teaming up and assembling and submitting 50 to 100 (or more) precedents at once, so as to populate a complete *BenNet Book*."

- ***How Do I...?***

The *How Do I...?* module has garnered a great deal of praise from both new hires and "old hands" at the firm. Not only for its functionality, but also for the vast amount of information about processes and procedures it contains.

"The task-oriented presentation makes people feel that the answers they need are literally at their fingertips," says Bawden. "Numerous suggestions received through the BenNet feedback widget indicate that people are delving into it in detail, and administrative personnel have reported a dramatic decrease in the number of questions they receive by phone or email."

Another side benefit of the module was derived from the process of developing it. The development process prompted the firm to centralize data and streamline administrative processes across the firm.

"This resulted in making staff more efficient (and using less paper, which of course benefits the environment)," says Bawden.

- ***Blogging***

And if *BenNet Books* is a good indication of participation, then participation in blogging is the definitive sign of success in participation.

"The uptake on blogs has been nothing short of remarkable," says Bawden, "especially for a population that previously was largely unfamiliar with blogging."

One of the blog features lets users, through a simple widget, subscribe to any or all blogs and choose to receive email alerts of blog postings on an immediate, daily, or weekly basis. Prior to the BenNet launch, the team made what turned out to be an important decision: to presubscribe everyone to their respective practice group or departmental blogs to receive daily email alerts of blog postings.

"We felt that if we wanted people to go to the effort of blogging, we needed to provide them with an audience," he says. "And presubscription created that audience."

In more than six months since launch, less than one percent of the firm's personnel have unsubscribed to blog alerts.

Other Measures of Success

Bawden cites some other measures that point to the new BenNet's success. These include:

- Extensive use of the *Share Your Work* widget, producing more content for *Knowledge Bank*, which arrives in a steady stream
- Extensive use of the BenNet feedback widget, yielding a wealth of suggestions for improvements and new features
- Employees' ability to simply start using BenNet, with little or no training (especially the lawyers, who rarely attend training), which is evidenced by minimal Help Desk calls
- Practice groups actively seeking assistance from KM lawyers in using BenNet's features and functionality to develop practice group resources
- More robust response to clients (in particular in context of RFPs), who increasingly want the law firms they engage to show evidence of efficiencies created through the use of technology
- More robust response to our recruiters, who have been increasingly queried by law school graduates about our technology. The same applies to potential lateral hires (that is, established lawyers from other firms), who are looking for a high level of practice support from technological tools

LESSONS LEARNED

As with all intranet project teams, the Bennett Jones team can claim some sweet victories and some painful lessons learned.

"Throughout the course of the BenNet project, we did some things right and some things wrong," says Bawden. "Fortunately for us, the things we did right outnumbered the things we would do differently next time."

Team members learned many lessons, including:

- **Solicit support and involvement from senior management.** "To start with, we cannot overemphasize the benefit of having significant management buy-in and involvement throughout the planning and execution phases of your project. Even the most well-run projects will hit a bump or two in the road (we

had our share), and when this occurs you want management on your side, instead of having to spend precious time bringing them up to speed and trying to secure their support.”

- **Dedicate an internal project manager.** “The second thing we cannot overemphasize (and one thing we initially failed to appreciate) is the importance of having an internal project manager who can spend all of his/her time focusing on the project. The internal project manager must comprehend an enormous amount of detail and must work closely with any external project managers. This is especially critical for projects such as ours, where we engaged different organizations to help with the user experience design and development.”
- **Articulate goals and guiding principles.** “Take time at the outset of the project to write down the goals and guiding principles for your intranet, and review them with senior management. This will help make difficult and/or political decisions easier, and can be extremely helpful when the team is tasked with determining which features to include in the current phase and which features to push off to a future phase.”
- **Invest in user experience design.** “Fortunately for us, some key members of the Steering Committee understood the importance of user experience design. Putting a significant amount of effort and resources into user experience design will mitigate risks around user adoption. Put more simply, it's the investment that will help you realize the larger investment. Many people in our organization do not have any desire to use technology for the sake of using technology: they simply want to find the information they are looking for and complete the work they need to do. We put considerable effort into making things visually appealing and simple to use and engaged user experience experts who were charged with this key responsibility. It really worked out well for us, and we would recommend that others make the investment in user experience design.”
- **Involve users.** “When designing features and functionality, always look for ways that you can get users more involved and engaged, as part of their normal routine, in the key elements that lead to a robust and healthy intranet. In our case, knowledge sharing is critical to the success of BenNet, so we went out of our way to develop functionality that would, without a lot of effort from our users, support knowledge sharing. Enabling users to attach comments to specific resources, providing a place for users to store their ‘stuff,’ and blogging are good examples.
“Usability testing is a great way to improve an intranet, but is also a phenomenal way of obtaining buy-in from key stakeholders in the organization.”
- **Be inclusive.** “Identify all of your stakeholders, ideally from the outset, and make them feel heard (which is not the same as trying to please everyone). Reach out for input using techniques such as card sorting and usability testing and communicate regularly. To paraphrase Lao Tse: ‘The best leader makes the people think it was their idea.’ In addition, treat every member of the team as a peer and encourage junior people to speak up. You will be surprised where some of the best ideas come from.”
- **Don't take shortcuts.** “In some instances in the design process, we went directly from requirements to mock-ups (i.e., omitting wireframes). We feel

that, in most of those instances, the omission of wireframes actually slowed the process by glossing over important questions (e.g., where is a particular set of data coming from?) that ultimately had to be answered. We would not do this again.”

- **Improve business processes.** “Building an intranet, as it turns out, is a great opportunity to improve business processes, and you will identify many things in the course of the project that can undoubtedly be improved. Be very selective — if it's broken and you can fix it, then fix it; if it's broken but it would take too much time or effort to fix, acknowledge it and consider addressing it post-launch; if it works but could be better, ask yourself how important it is to fix. Your goals and guiding principles will be helpful in making some of these challenging decisions.”
- **Manage the paper.** “Be prepared for a tsunami of documentation: requirements documents, wireframes, mock-ups, minutes of meetings, etc., and multiple versions of each, from multiple organizations and authors. We did a reasonable job of keeping track of the paper, but it took a lot of effort and next time we would provide our internal project manager with a records clerk, whose primary task would be to capture and organize all of the documentation (including successive versions) in our DMS.
“We didn't have a dedicated Business Analyst assigned to the project to capture detailed requirements. The wireframes we created had notes attached to them, but it would have been useful to capture detailed requirements at the same time. Towards the end of the user interface design phase we did use a wiki, where we uploaded the mockup and/or wireframe and had the team capture requirements — this worked well, but we should have done it sooner!”
- **Don't skimp on the timeline.** “This project was successful because Bennett Jones was willing to spend so much time working on the project. Clients are often not able to dedicate such a large team and so much time to a project.”
- **Include the technical architect along the way.** “The Technical Solution Architect (from V51) was at every user experience design meeting, which was incredibly helpful and resulted in a final intranet that really respected the user experience we tried to create.”

And one last thing to keep in mind when undertaking this type of project:

- **It's a lot of work.** “We underestimated the amount of work that was required to complete the project! We underestimated the scope that Bennett Jones would want to include in their initial launch (especially with the size and complexity of the *Knowledge Bank* area). They took on an incredible amount of functionality for the first phase of an intranet.”

Mota-Engil Engenharia e Construção, S.A. (2011)

Using the intranet:

With 60 years of experience, Portugal-based Mota-Engil is a leading construction enterprise with more than 20,000 employees operating in 17 countries. Principal activities include civil engineering infrastructure projects, bridges, dams, industrial buildings, schools, chimneys, and roads; energy and steel works, steel structures, energy equipment, and electricity; and transport concessions and environmental services (waste and water treatment). Mota-Engil also deals with logistics, retail and warehousing.

Headquarters: Porto, Portugal

Number of employees the intranet supports: 500

Company locations: Operates in 17 countries

Locations where people use the intranet: Portugal

Annual sales: 1.694 billion

Design team:

In-house: Three people formed the core team, working across 22 departments.

Agency: WeListen took part in the project as both developer and consultant.

Members:

In-house: Antonio Ruivo Meireles, Innovation Manager; Maria João Veiga, *InnovCenter* Manager; and Joao Ribeiro Pinto, IT Manager

WeListen–Business Solutions: Carlos Mendes, Leonardo Varella-Cid, Ricardo Lapão, Bruno Lopes, and João Sousa

SUMMARY

Not every intranet project is jumpstarted by the company's board of directors sending personal letters to each user, inviting participation. This gesture reflects the importance placed on *InnovCenter*, a center for innovation management within Mota-Engil's intranet and in the organization as a whole. The company strongly believes its future depends on innovation and wants it to be a part of what people do daily.

InnovCenter currently supports the 500 Portuguese employees, who are part of the company's 20,000 employees in 17 countries. The team decided that, given the tool's importance, a gradual roll-out to the company, one group at a time, was the best approach. They wanted to do it right, rather than quickly.

The ultimate goal is to cross organizational boundaries, break down vertical barriers, and give a voice to all employees and explore their potential, allowing the company to know its employees better.

The project arose out of the company's existing innovation process, which used many different systems, was cumbersome, and failed to keep employees informed about what happened to their ideas. The team needed a tool that would manage all stages of innovation — from ideas to opportunities to execution to implemented projects — and that would allow a company-wide conversation across 17 countries. After looking, without success, for an out-of-the-box solution for managing the innovation process from inception to completion, the team turned to the agency WeListen to help design the solution (which is now a commercially available innovation platform called *InnovationCast*).

The site's homepage introduces new users to the tool and its goal, and keeps users up-to-date on innovation progress within the company. This emphasis on always showing numbers — the number of ideas, number of implemented projects, number

of views, number of votes — pervades the site. Feedback is everywhere. The homepage shows users the number of *Submitted Ideas*, *Innovative Ideas*, *Innovation Opportunities*, and *Innovation Projects* in the works. Further, *Innovation Alerts* remind users of pending or upcoming tasks, milestones, or requests for action.

The homepage's main focus now is marketing, introducing the tool to users. As time progresses, this emphasis may shift to provide more space for news. The *News* section features the latest articles from an innovation-based blog on the main intranet site. Stories cover innovation events inside or outside of the organization or highlight a specific *InnovCenter* activity. Anyone can comment on a story and start a conversation. Users can use filters to see the latest news, most viewed, or most commented.

Throughout the site, the page's main content is displayed to the left, with the right side of the page dedicated to related or helpful information. On the homepage, the right pane presents links inviting users to participate. A list of top users, as well as recent activity, helps encourage use as well by showing employees who is participating and what is currently going on. Recent activity can be set to show all users, only the employee him- or herself, or can be set to show only microblogging user updates.

A link bar at the top of the page allows access to the company's main intranet, On.ME, and the knowledge management platform, *LinkME*.

InnovCenter
Mota-Engil Engenharia

Portals: On ME Link ME **InnovCenter**

Home Challenges Ideas Opportunities Projects News FAQ Guidelines Analytics

I have 0 innovation alerts:

- Coauthorship Requests 0 alerts
- Ideas 0 alerts
- Idea Evaluations 0 alerts
- Opportunities 0 alerts
- Projects 0 alerts

Ever thought your ideas can make a difference?

InnovCenter
Share your ideas.
Promote ideas you believe in.
Be involved and add value.

72 Submitted Ideas >> 13 Innovative Ideas >> 44 Innovation Opportunities >> 38 Innovation Projects

» Mota-Engil's Innovation Process »

The more you contribute, the more points you get.

- View Challenges**
Ideas needed!
- Submit Challenge**
Gather ideas to solve your problem. Explore an opportunity!
- View Ideas**
View, Vote, Add value.
- Submit Idea**
Place your idea under discussion.

You have **27 points** (12 available)

TOP USERS (LAST 30 DAYS)

Antonio Machado Ruivo Sanguêdo Meireles	15 points
Pedro Filipe Gomes Serra	12 points
Luis Sousa	12 points
Carla Ferreira Sousa	11 points
Vitor Peixoto	8 points

Contribute with suggestions to improve InnovCenter. Send us your **Feedback!** (at the end of every page)

RECENT ACTIVITY

What are you doing? **Post**

All My Activity Messages

Friday

Administrador do Portal colocou mensagem no blog: Novo Projecto Inovador - Monitorização na Ponte Vasco da... em Notícias de Inovação - Mota-Engil.
1 hour, 37 minutes ago

Thursday

Vitor Peixoto avaliou a ideia Parque de estacionamento no Porto com aulas de eco-condução por 1 dia: Inadequada.
qui, Set 2 2010, 9:52

Vitor Peixoto avaliou a ideia Carros Híbridos - Testes para sensibilização para estes veículos: Stand By.
qui, Set 2 2010, 9:47

Vitor Peixoto avaliou a ideia Semana no dia Europeu sem carros: Stand By.
qui, Set 2 2010, 9:37

Vitor Peixoto avaliou a ideia Compensação de CO2 no Dia Europeu sem Carros: Stand By.
qui, Set 2 2010, 9:32

Show More

NEWS

Most Recent Most Views Most Comments

NOTÍCIAS DE INOVAÇÃO - MOTA-ENGIL
Novo Projecto Inovador - Monitorização na Ponte Vasco da...
1 hour ago by Administrador do Portal
Monitorização na Ponte Vasco da Gama por GNSS O sistema GNSS (Global Navigation Satellite System), o actual nome dado ao mais conhecido sistema GPS (Global Positioning System). Para garantir um sistema fiável e robusto na monitorização da Ponte Vasco...

NOTÍCIAS DE INOVAÇÃO - MOTA-ENGIL
Novo Projecto Inovador - Manual de estudos de formulação...
qua, Set 1 2010 by Administrador do Portal
Manual de estudos de formulação executados em laboratório O projecto consiste recolha bibliográfica das diferentes metodologias utilizadas em estudos de formulação executados no LABC. Pretende-se no final elaborar um manual onde seja descrito detalhadamente...

NOTÍCIAS DE INOVAÇÃO - MOTA-ENGIL
Novo Projecto Inovador - Contribuição para o estudo do T...
qua, Set 1 2010 by Administrador do Portal
Contribuição para o estudo do Tratamento de Solos: Avaliação da Deformabilidade O projecto têm como objectivo estudar e desenvolver uma tecnologia inovadora para avaliação em contínuo da evolução do módulo de deformabilidade em solos tratados com ligantes...

NOTÍCIAS DE INOVAÇÃO - MOTA-ENGIL
Novo Projecto Inovador - Contribuição para o estudo da t...
qua, Ago 25 2010 by Administrador do Portal
Contribuição para o estudo da tracção indirecta no tratamento combinado de solos com cal e cimento O projecto, inserido na elaboração de uma tese de mestrado a apresentar ao ISEP, consiste na avaliação...

NOTÍCIAS DE INOVAÇÃO - MOTA-ENGIL
Novo Projecto Inovador - Estudo da relação entre a compr...
qua, Ago 25 2010 by Administrador do Portal
Estudo da relação entre a compressão diametral e simples em solos tratados com ligantes hidráulicos O projecto consiste na compilação e análise dos resultados obtidos em estudos de formulação executados no LABC em solos tratados com ligantes hidráulicos...

1 2 3 4 5 >

feedback :))

Powered by **telligent** Developed by **WeListen**

Pictured: The homepage markets the *InnovCenter* to employees and invites them to take action via prominent links in the right panel. The page emphasizes what's new and what's happening on the site, listing usage statistics, recent activity, and top users.

The innovation process is reflected in the site's navigational structure. Challenges spur ideas. Strong ideas can become opportunities on their own or combined with other related ideas. Viable opportunities become projects. Information about all challenges, ideas, opportunities, and projects can be analyzed through the *Analytics* tab, available to all employees.

The entire site is based on contribution, participation, and collaboration. Employees are recognized for their contributions via a points system. Points are shown next to the user's name. Anyone can submit a challenge, which is a problem, need, or opportunity for the organization. Further, anyone can post an idea, which can be an answer to a challenge or an independent idea.

The team found through initial research that part of the problem with the existing innovation system was that there was no framework in which to innovate: users had to come up with ideas out of the blue. And, even though those independent ideas were also welcome, people usually come up with ideas when confronted with a real challenge. Challenges now provide a framework in which to innovate.

The *Challenge* page shows users current challenges. Here, users can review challenges, submit an idea, subscribe to be notified when an idea is submitted, or send a challenge to a colleague.

Each challenge lists the challenge name, a brief summary, and the category it falls under. The person who submitted the challenge is also listed, along with the date it was posted. Time is emphasized throughout the design, as the entire system includes deadlines, schedules, and milestones. The goal is to move ideas through the system and to avoid analysis paralysis.

Each challenge is accompanied by the number of ideas submitted. A "lit" light bulb indicates that an idea has been submitted for the challenge, while a "dark" light bulb indicates no ideas have been entered.

Users can navigate to specific challenges using the list of themes on the right side of the page. The panel also includes guidance and information about what users can do on the page.

inclusive and explanatory. The site sets up a structure to guide users through all steps along the way, giving users the tools they need to create, manage, and assess.

The design is thoughtful and based on both user and organizational needs. For instance, when users enter a title for an idea, the system automatically searches for similar ideas and warns users if a similar idea has already been submitted. In these instances, users are encouraged to contribute to an existing idea rather than creating a duplicate.

The idea submission form is not simply an open text field. The page guides users not only in how to enter an idea, but also in defining and supporting the idea, asking them to define the idea's benefits and target audience, for example.

Ideas can be saved as drafts before being submitted, allowing employees to put in more thought, gather more information, or attend to other daily work in the middle of submitting information.

InnovCenter
Web-based Programs

Home | Challenges | Ideas | Experiments | Projects | News | FAQ | Guidelines | Analytics | Advanced ideas

Admin: My Profile | My Ideas | My Evaluation | My Projects | My Challenges | My Experiments | My Projects | My News | My FAQ | My Guidelines | My Analytics | My Advanced ideas

Log out

General Information

In this section you should submit the idea's name, classify it and write its summary.

Idea title *

You have 100 characters.

Main Challenge *

In case your idea is not associated with any of the existing challenges, please select the option 'no adequate challenge exists'.

☐ Choose main challenge

Related Challenge(s)

☐ Add (change related challenge(s))

Idea Type

(select one or multiple options)

☐ Product/Service
Introduction of new, or significantly improved, products and services.

☐ Process
Implementation of new, or significantly improved, manufacturing, logistics or distribution processes.

☐ Organizational
Implementation of new organizational methods for business practices, work organization and/or external relations.

☐ Marketing
Implementation of new marketing methods, including significant improvements in product design or packaging, price, distribution and promotion.

Maturity status of the idea *

☐ Fair idea, it's only a concept

☐ Already in development, with some of the work already done

☐ Development almost finished, with need for refinements

☐ Ready for market / implementation, I just need some help

Description Summary *

You have 100 characters.

Idea Co-authors

Type the names of the person(s) to be notified:

Detailed Information

In this section you should submit more descriptive info on the idea, such as its benefits or risks.

Want to associate an image to your idea?

Image address for your project:

Full Description *

You have 1000 characters.

Problems solved by this idea *

What would be solved would be solved by the implementation of this idea?

You have 1000 characters.

Benefits *

What is unique to your idea or improves something?

You have 1000 characters.

Target *

What is the target public for your idea?

You have 1000 characters.

Additional Information

In this section you should add any other information you consider relevant.

Remarks

You have 1000 characters.

Tags

Keywords or expressions which help find your idea. Separate your keywords with semi-colons.

Add attachments

Images or other relevant files:

Submit Idea

What do you want to do with this idea?

Submit directly to Evaluation (without discussion)

If you consider that your idea should be confidential, you may submit it directly for Evaluation using the "Private" option.

Idea privacy:

☐ Public (may be reviewed, but not discussed)

☐ Private (may not be reviewed by colleagues)

Pictured: The *Idea* submission form guides users through the submission process but also helps them formulate their ideas by asking specific questions, such as about the idea's benefits and target market.

The *Idea Portfolio* allows employees to see all public ideas in the system and discuss, contribute to, or vote on ideas. Users can view *Recent Ideas*, *Best Rated*, *Archived* (for ideas that have been evaluated or discarded), their own ideas (*My Ideas*), and ideas they've commented on. Each view of ideas can be filtered by idea status or evaluation result and can also be limited to a particular challenge.

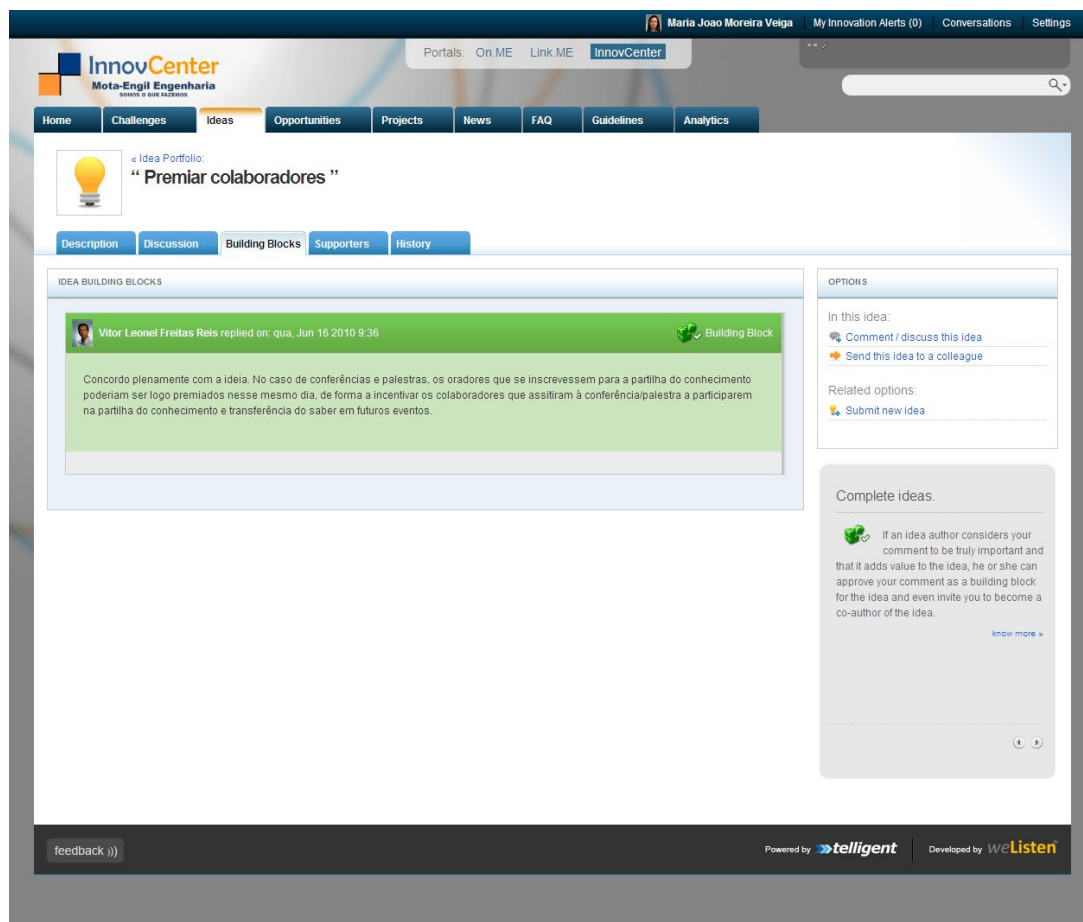
Each idea shows a title and summary description. Here again, numbers and status are central. The idea information shows the total score, number of votes, and number of comments. Users can also see the category and associated challenge, the author (which links to the user's profile), the author's department and earned innovation points, and the idea's status.

On the side of the *Idea Portfolio* page, users can see their own ideas, their idea evaluations (for managers only), and the current number of overall active ideas.

From here, users can vote to promote or demote an idea. Anyone voting for an idea becomes associated with the idea as an idea supporter. A simple up or down arrow lets employees quickly vote on ideas.



Each idea has an associated discussion area for comments. Anyone in the community can submit a comment. If the idea author finds a comment insightful, he or she can mark the comment as a *Building Block*. This feature helps identify the highest quality contributions to discussions, as well as recognizes and encourages high-quality contributions. Idea authors can also invite *Building Block* authors to be co-authors on the idea.



Pictured: Idea authors can designate a valuable comment on their idea as a *Building Block*, identifying the comment as a quality contribution. Authors can also add *Building Block* authors as co-authors to an idea, encouraging collaboration.

A challenge manager — typically the individual who posted a challenge — evaluates the quality of ideas. The idea evaluation tool helps challenge managers assess suggestions. To help with this, the site provides a framework of four business dimensions, which are each represented by a series of questions that managers rate on a 1–5 scale. Managers answer each question and justify the rating. The site then averages the ratings to show the manager a visual representation of the idea’s strength.

Recognizing that challenge managers might not have the expertise needed to fully evaluate an idea, the site guides users through the evaluation process. Further, the evaluation area includes a tab for *Expert Insights*. This area allows a private discussion with people the manager can invite to help with the evaluation.

Enter Edit Mode | Control Panel

Antonio Machado Ruivo Sanguado Mendes My Innovation Alerts (12) Conversations Settings

Portals ON ME Link ME InnovCenter 3 for ideas

Home Challenges Ideas Opportunities Projects News FAQ Guidelines Analytics Administration

« Idea Portfolio

« Solução Inovadora de Gestão da Construção »

Description Discussion Building blocks Supporters History Evaluation Expert Insights

IDEA EVALUATION FORM

Read-only Mode: this idea is not in Evaluation

Evaluation version: 1

Options

Related options

Submit new idea

ADMINISTRATION

Delete idea

EVALUATION VERSIONS

Version 1 (2.03.2010 15:14)

Idea Evaluation

These graphs are aimed only at assisting your decision. The final decision is always yours!

Know more

1. Evaluation of Strategy, Potential, Resources and Risks

Evaluate this idea regarding its strategic framing, potential, resources and risks. Please justify your evaluation.

1.1 Strategy

1.2 Potential

What type of idea is this? Select the types you consider adequate to evaluate the idea according to corresponding guidelines.

Product/Service (option chosen by the idea's author)

Process (option chosen by the idea's author)

Level of newness of the developed methodologies: Level: 1 2 3 4 5

Methodologies previously utilized at a global level: You have 654 characters.

Level of contribution for the improvement of quality, performance and efficiency: Level: 1 2 3 4 5

Consequences: eliminar muitas incompatibilidades e retrabalhos em obra. You have 420 characters.

Organizational

Marketing

1.3 Resources

1.4 Risks

2. Final Evaluation and Followup

Considering your evaluation (summarized in the graphs below), classify this idea.

Potential (averages)

Process

Factors (averages)

Strategy

Resources

Risk

As a consequence of this analysis, I believe this idea should be transferred to the Portfolio of:

Unsuitable Ideas / no value

Continuous improvement (to be placed on the Improvements Online Platform)

Ideas in Standby

Innovative Ideas

Level of priority to study the Innovative Idea: Level: 1 2 3 4 5

Remarks:

This text will be sent to the author and co-authors of the idea (should they exist), together with the final result of your evaluation selected above.

Feedback

Powered by intelligent

Developed by iVeeListen

Pictured: The *Idea Evaluation* tool provides a framework for employees to review an idea's quality by asking a series of questions and showing a visual representation of the idea's strength.

Highly rated ideas become *Innovative Ideas* and move to the *Opportunities Portfolio*. Here, ideas can be combined and lead to an *Innovation Opportunity*. The public view of opportunities summarizes the project, lists the associated project team, discusses expected results or impacts, and lists internal and external stakeholders.

The teams working on *Innovation Opportunities* do so on the site, through a *Shared Workspace*. Links to workspaces appear on the user's opportunity list and are only visible if the user is a member of the opportunity team. The site is built to accommodate the full innovation process, from inception to implementation, and as such includes project tools for teams to use along the way.

For example, the *Project Plan* tab provides the tools needed to build a project plan, from risk management and budgeting to scheduling and task management, together with a team wiki, forum, and blog to support collaboration.

The tool must be flexible to accommodate many different project types. Project management is essential. The site allows team members to create a project schedule, creating project activities and subdividing those into tasks, which are then associated with people and start and end dates. Tasks can be assigned to one or more people to accommodate the fact that projects will have tasks with varying granularity. The site automatically creates Gantt charts showing the project schedule.

Enter Edit Mode | Control Panel

Maria Joao Moreira Veiga My Innovation Alerts (0) Conversations Settings

Portals: On ME Link ME InnovCenter

InnovCenter
Mota-Engil Engenharia
SOMOS O QUE FAZEMOS

Home Challenges Ideas Opportunities Projects News FAQ Guidelines Analytics Administration

< Innovation Opportunities Portfolio
2010-11 - Line of Business (pilote)
This is the private collaborative workspace for this Innovation Opportunity's team.

Home Project Sheet Project Plan Evaluation Directory Opportunity Forum Opportunity Wiki

INNOVATION OPPORTUNITY - PROJECT PLAN

Risk Budget Cost Control Project Schedule Milestones Partnerships and IP Interfaces and Knowledge Responsibilities

Project Schedule

In this section you can manage all project activities and tasks.

Team member in charge of this section:
Edgar Jose Soares da Costa

	Mar 10	Apr 10	May 10	Jun 10	Jul 10	Aug 10	Sep 10	Oct 10	Nov 10
Innovation Opportunity Study									
Piloto na Escola Secundária Ferreira de Castro									

Unfinished Activities Finished Activities

Activities: [add activity](#) [Export Project Schedule](#)

☒ Innovation Opportunity Study
(0 of 0 tasks to be done)
01/04/2010 - 16/05/2010
Activity Manager: Antonio Machado Ruivo Sanguêdo Meireles

☒ Piloto na Escola Secundária Ferreira de Castro
(2 of 2 tasks to be done)
17/05/2010 - 15/10/2010
Activity Manager: Edgar Jose Soares da Costa

[Save Project Schedule](#) (save all changes made on this screen - Project Schedule section)

23 days left to Opportunity study deadline.
Based on the date of the milestone when this Opportunity will be submitted for approval.

There are 0 files attached to this page.
[attach a file to this page](#)

Project Schedule (1/3)

All activities that are part of the Opportunity study should be included in the "Opportunity Study" section. All other activities which are added to the project must be scheduled for after the "Opportunity Study" activity.

The "Opportunity Study" activity is omitted in the project phase.

[know more >](#)

feedback :))

Powered by **telligent** | Developed by **WEListen**

Pictured: Project tools help teams evaluate *Opportunities*, providing a shared workspace.

If the Innovation Committee, a workgroup made up of Board members, approves an opportunity, it moves to the execution phase. This might involve people within and outside the organization. Execution is managed through *InnovCenter*, allowing culturally and geographically diverse teams to work together. Once the project receives company approval, team members have the same set of tools at their disposal as in the opportunity phase, complete with all information already gathered. A few additional tools appear as well; the emphasis is on execution, rather than planning.

For example, teams can track the project's budget. For every cost, members select the budget where it belongs and enter the planned and effective cost for that item. This tracks the remaining budget and total effective costs to show if a budget is slipping and draw attention to that fact sooner rather than later.

The screenshot displays the InnovCenter web application interface. At the top, there's a navigation bar with links like Home, Challenges, Ideas, Opportunities, Projects, News, FAQ, Guidelines, Analytics, and Administration. The main content area is titled 'Innovation Projects Portfolio' and 'Rede GNSS'. Below this, there's a 'Project Sheet' tab selected, leading to the 'Project Plan' section. The 'Cost Control' tab is active, showing a table of planned and effective costs for various months from 2009 to 2010. A sidebar on the right contains a '167 days left to Project deadline' warning, a file attachment section, and a 'Cost Control (Opportunity)' section. The bottom of the page features a footer with 'Powered by telligent' and 'Developed by WeListen'.

Cost Control Table Data:

Month	Total Planned Costs	Total Effective Costs	Deviation
2009 September	0,00 €	0,00 €	0,00 €
2009 October	0,00 €	0,00 €	0,00 €
2009 November	0,00 €	0,00 €	0,00 €
2009 December	445.110,00 €	445.110,00 €	0,00 €
2010 January	0,00 €	0,00 €	0,00 €
2010 February	0,00 €	0,00 €	0,00 €
2010 March	0,00 €	0,00 €	0,00 €
2010 April	0,00 €	0,00 €	0,00 €

Cost Control Form:

Cost type: Cost description: Planned Cost: Effective Cost:

(Cost Type) Cost Description

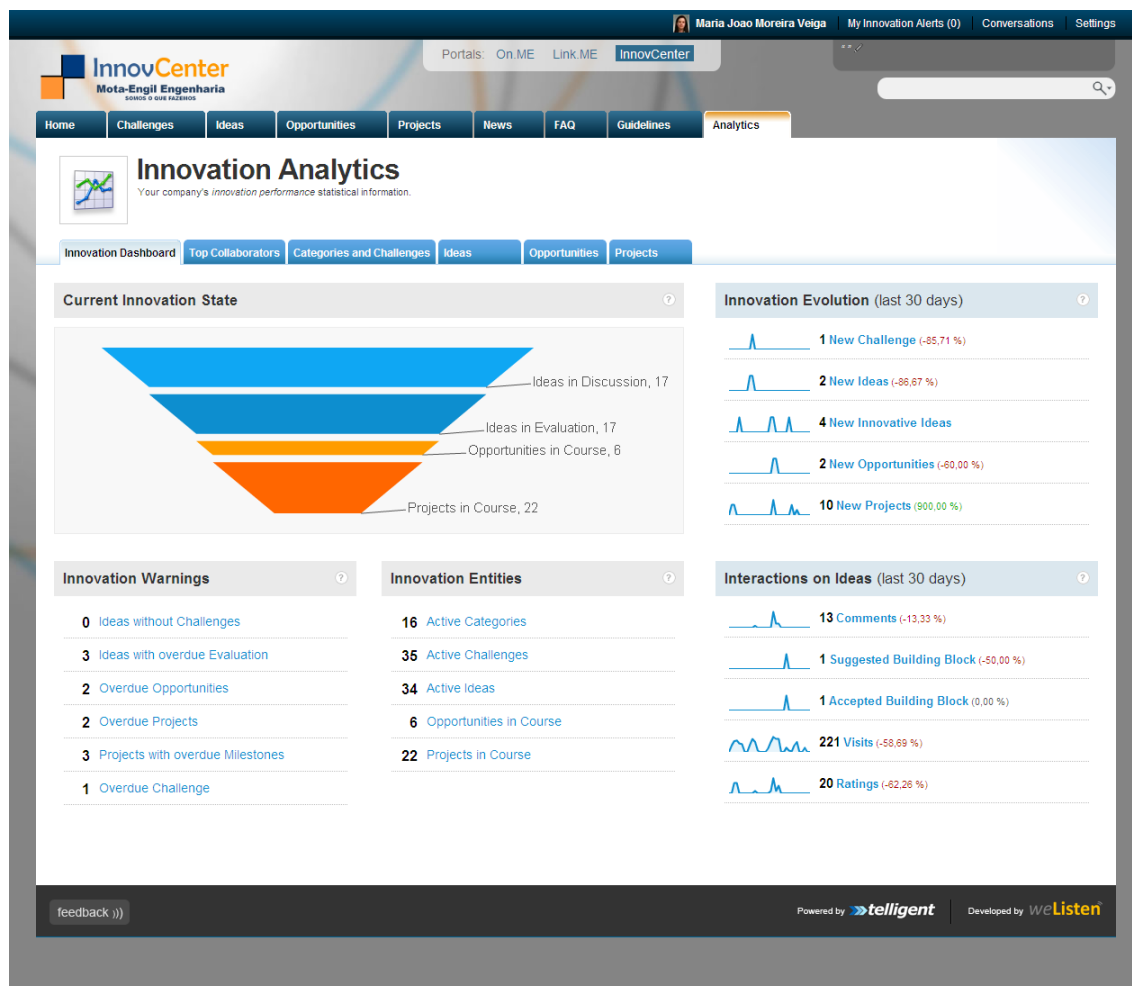
(Cost Type) Cost Description	Planned Cost	Effective Cost	Deviation
(Equipment) Equipamento para 2009	445.110,00 €	445.110,00 €	0,00 €

Save Cost Control (save all changes made on this screen - Cost Control section)

Pictured: A variety of project management tools are available through the site, including a budget tool for project implementation.

Transparency is key on the site. The system keeps everyone informed as projects progress and hides very little. Users can see information about challenges, ideas, opportunities, and projects. Although team sites are private, a public view of project information is always available. Automatic emails are triggered at critical points. Contributors receive feedback from evaluators and know who evaluated an idea. Directors can see all projects being studied and developed. The innovation team can track projects, identify delays and track spending on implemented projects. Anyone can view site analytics, to see the status and number of projects, innovation trends, or most active users, among many other tracked criteria.

The *Innovation Dashboard* summarizes activity on the site and offers users a link to more information. The *Innovation Funnel* shows what's currently in the pipeline. Warnings identify possible bottlenecks or problems. Evolution shows the birds-eye view of challenges, ideas, opportunities, and projects created in the past 30 days, as well as graphically showing how activity was distributed across that time period. It also compares current activity with prior activity. The *Interactions* section calculates the numbers of comments, *Building Blocks*, visits, and ratings an idea has generated over the past 30 days.



Pictured: Analytics are available for all users, supporting the idea of transparency on the site.

One of the key things the team learned in early planning was that it was necessary to recognize and reward users' engagement in innovation. A points system allows the company to achieve this. An annual event celebrates the most innovative people at the company, which is determined in part by the points system. Points show others how active users are, give users a sense of their own participation, and can motivate involvement. Users can use points for prizes, and the team can build a points store down the road. Administrators can change the number of points associated with different actions to incentivize users to perform various tasks. Points are featured throughout the site, shown under users' thumbnail images.

Hard work resulted in a powerful tool for innovation within the organization that inspires participation, informs contributors, enables decision-makers, and results in successful innovation projects across the company.

BACKGROUND

Putting Innovation First

Innovation is an important part of the Mota-Engil core business strategy. While the company has many intranet applications, the company is most proud of its efforts in creating *InnovCenter*, its intranet for innovation management.

"Innovation is an important part of our company's strategy," says Antonio Ruivo Meireles, Innovation Manager. "Our Board believes that the future of the company and its sustainability depends on our capacity to innovate."

"The commitment is so strong that every month there is an Innovation Committee (with the Board present) to discuss every ongoing project and every new opportunity," he says.

From a business viewpoint, the company's challenge was to make sure that innovation is not just part of the corporate jargon, but is instead part of what people think about and do on a daily basis. After all, innovating across geographic divides is not always easy.

"Being a globally distributed company, we needed an effective way to catalyze innovation across all kinds of organizational boundaries," he says.

So, the first step toward creating effective communication was recognizing what was and wasn't working. The goal was to give voice to all areas of the organization and let all employees explore their potential.

"Mota-Engil Engenharia knows the potential of its management staff and understands that it wasn't frequently taking advantage of the potential value of the company's collective intellect," says Meireles. "The company wants to know better its organization and wants the organization to know itself better."

"*InnovCenter* allowed us to break some barriers connecting an organization that has been traditionally vertical. Innovation is extremely important for achieving our strategy and goals in both the medium and long-term," he says.

Listening to Users to Define Requirements

In 2008, the company made the decision to certify its RDI Management System according to Portuguese Standard NP4457:2007.

"The goal," says Meireles, "was to bring some more systematization to our internal systems and propagate a culture that already existed among some employees."

Through the process of applying this management system, organizational leaders found the company had become "very bureaucratic," and they felt it needed to be simplified.

So, the first initiative toward this goal was to migrate all existing process forms to an intranet platform. From there, the intranet team looked for guidance from the user community to help them understand what functionalities would be critical for any platform they might choose to deploy. The team used an open source solution to provide a feedback mechanism to support this initial requirements-gathering phase.

After "listening" for a year, the team developed a complete specification that allowed them to start searching for the best technology solution. This was in the beginning of 2009.

And what they found was surprising. There weren't any platforms that could provide support for the innovation cycle from end-to-end.

"We were amazed that there weren't any platforms that could take care of the entire innovation cycle (from idea to project) in an integrated way," says Meireles. "So, we started to think about developing our own platform."

Taking on this type of project in-house can be challenging, even for the most experienced teams. The company therefore looked carefully to find the right agency partner to complement the team's native skills.

"We needed an IT development agency, but also an agency that would understand the innovation concepts, making conversations easier throughout the development process," says Meireles.

The company chose WeListen because it demonstrated the right balance of technical expertise and consulting acumen. And it provided new ideas to complement what Mota-Engil had laid out in the specification.

In August 2009, work began on *InnovCenter*. The basic premise from the start was that the entire organization would be represented in the development process. The team planned to ensure this participation by conducting several proof of concept sessions in each stage of development. This would ensure that every feature could be approved and discussed with each department.

Aspects of the Innovation Lifecycle

The result of the team's planning and design efforts is a collaborative platform that supports the innovation cycle every step of the way. It does so with a variety of features and functionalities. Some of the key features of the process are:

Challenges

An innovation challenge is a problem that the organization is facing or an emerging opportunity. The challenge is the key building block of the innovation lifecycle. Anyone can pose a challenge to the organization. But the platform also allows the company to have challenges directly posted by end users.

In the current system, users can suggest a challenge, which is then posted by the Innovation department. Anyone can submit a challenge and once submitted, other users can contribute ideas for resolving the challenge.

This relationship between the submitter and the other contributors is relevant because the system is designed to put the burden or responsibility on the submitter. That person is responsible for evaluating the ideas that are submitted to that specific challenge.

The company's Innovation department moderates challenge submissions. This oversight is somewhat administrative: to ensure that the challenge is unique — that is, not a rehash of a previously submitted challenge — and to refine the challenge before posting.

"We help the person in question to streamline his challenge and make sure it is clear before publishing it," says Meireles. "Moreover, we need to make sure that the challenge is unique."

Challenges can be organized into categories, which lets the team create a structure that's easy to understand and easy to navigate.

Pictured: Each opportunity has a set of public data that all website users can see, even if they're not in the opportunity's study team. By clicking on any opportunity, users can see a header with the following information: the opportunity's title and description, the type of project and innovation, how many days ago it was submitted, the status, the priority that was given to the study of this opportunity, and the number of visits. If the opportunity's study is close to or beyond its deadline, a yellow-background warning is shown, along with information about how many days are left or how many days it is past the deadline. Under that header, it shows further details about the opportunity, including project team (with each team member's responsibilities, division, and processes), project assumptions and restrictions, expected results or impacts (both qualitative and quantitative), and the internal and external stakeholders that are involved.

Pictured: Before the opportunity can be submitted for company-wide evaluation, team members must themselves evaluate the opportunity. The evaluation is divided into three groups, each corresponding to a different percentage of the total innovation score: *Knowledge* (25%), where the team can assess if the knowledge created is merely an improvement on existing knowledge or the creation of unique knowledge; *Performance* (35%), a measure of the level of perceived customer perceived impact; and *Competitive Advantage* (40%), which ranges from simply matching the competition to creating a new business model or product, or even a new patent.

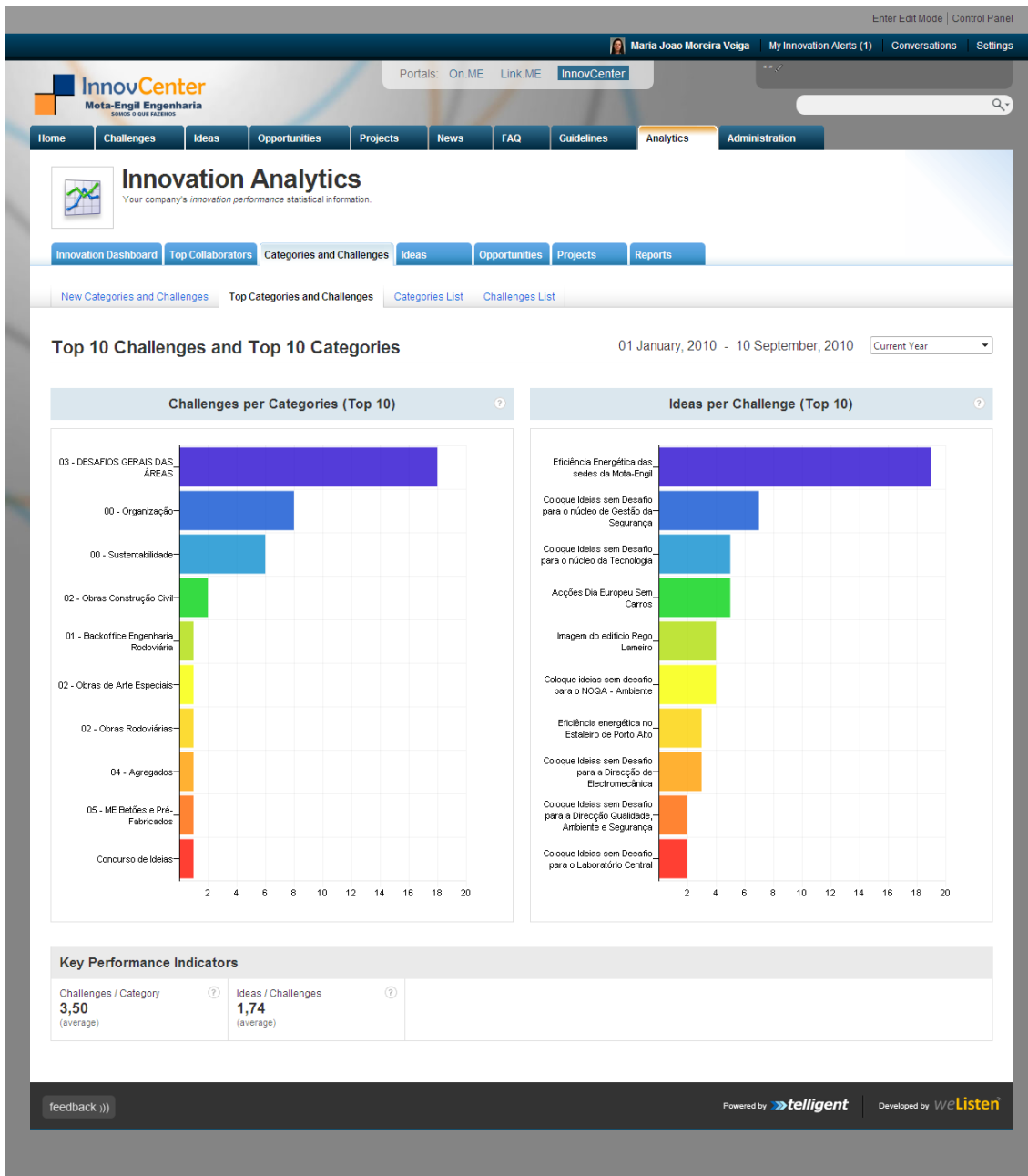
User Profiles

Mota-Engil is using Enterprise 2.0 technologies — namely, Telligent's Evolution Platform — to foster connectivity and enable collaboration.

"One of the by-products of using such platforms is that you get to know people that otherwise you wouldn't probably know," says Meireles.

To facilitate these introductions, the system features user profiles. Currently, they hold only general information about users, including a photo, name, contact information, department, and a short biography. But, in the near future, this information will be supplemented with information such as past projects, certifications, competencies, and topics of interest and expertise.

"This allows us to understand, through time, what are the main areas in which we're innovating," says Meireles.



Pictured: Through the *Categories and Challenges* section, team members can monitor which categories and challenges have been created during a specific time period. This helps them gauge which categories are generating the most challenges and which challenges have more ideas. Over time, this helps team members understand the main areas in which the company is innovating.

The Idea

The idea is at the heart of the innovation lifecycle. The *InnovCenter* features a page where new ideas are featured and the lifecycle of the idea is tracked over time. The page shows categories, challenges, ideas, opportunities, and projects. The page related to the creation of the idea shows the team how many ideas are being generated and what kind of interactions are happening around them during a specific period.

The team analyzes key indicators to find out more about what's happening with the idea. These might include: How many ideas are collective (have co-authors)? How many ideas are anonymous? How many ideas are private? How many interactions have been happening around the idea?

By analyzing these indicators, team members can keep a close watch on the health of the company's innovation cycle.

The screens below show different aspects of the idea interface.

Enter Edit Mode | Control Panel

Antonio Machado Ruivo Sanguêdo Meireles My Innovation Alerts (12) Conversations Settings

Portals: On ME Link ME InnovCenter

InnovCenter
Mota-Engil Engenharia
SÓCIEDADE DE SERVIÇOS DE INOVAÇÃO

Customize

Home Challenges Ideas Opportunities Projects News FAQ Guidelines Analytics Administration

« Idea Portfolio: "Premiar colaboradores" »

Description Discussion Building Blocks Supporters History Evaluation Expert Insights

IDEA DESCRIPTION

"Premiar colaboradores"
Propor prêmios aos colaboradores para motivá-los e incentivá-los.

Submitted 19 days ago
Idea Type: Tags: Prêmios
Status: In Discussion
In 40 days this idea will be automatically submitted for evaluation.

30 Promote
3 votes
3 supporters
40 visits
2 comments

Main Challenge:
Falhas de comunicação e transferência de conhecimento (Jovens Licenciados)
Como poderemos ultrapassar as falhas de comunicação e de transferência de conhecimento existentes entre a Produção e os Serviços e vice-versa?

Related Challenges:

Options
In this idea:
Comment / discuss this idea
Send this idea to a colleague
Related options:
Submit new idea

ADMINISTRATION
change main challenge
change related challenges
delete idea

Complete ideas.
If an idea author considers your comment to be truly important and that it adds value to the idea, he or she can approve your comment as a building block for the idea and even invite you to become a co-author of the idea.
know more »

Detailed Information

Idea maturity status:
For now, it's only a concept

Idea's full description
Providenciar incentivos aos colaboradores que partilhem o conhecimento pois num ambiente em que haja comunicação e diálogo, existe motivação para superar desafios e metas. Deste modo podia-se estabelecer períodos de tempo e lugares para a transferência de conhecimento: conferências, palestras e relatórios premiando os colaboradores que se destacam.

Problems solved by this Idea
Falta de motivação e falta de comunicação.

Benefits
Aumento da produtividade dos Colaboradores.
Colaboradores mais satisfeitos.

Target
Colaboradores ME.

Additional Information

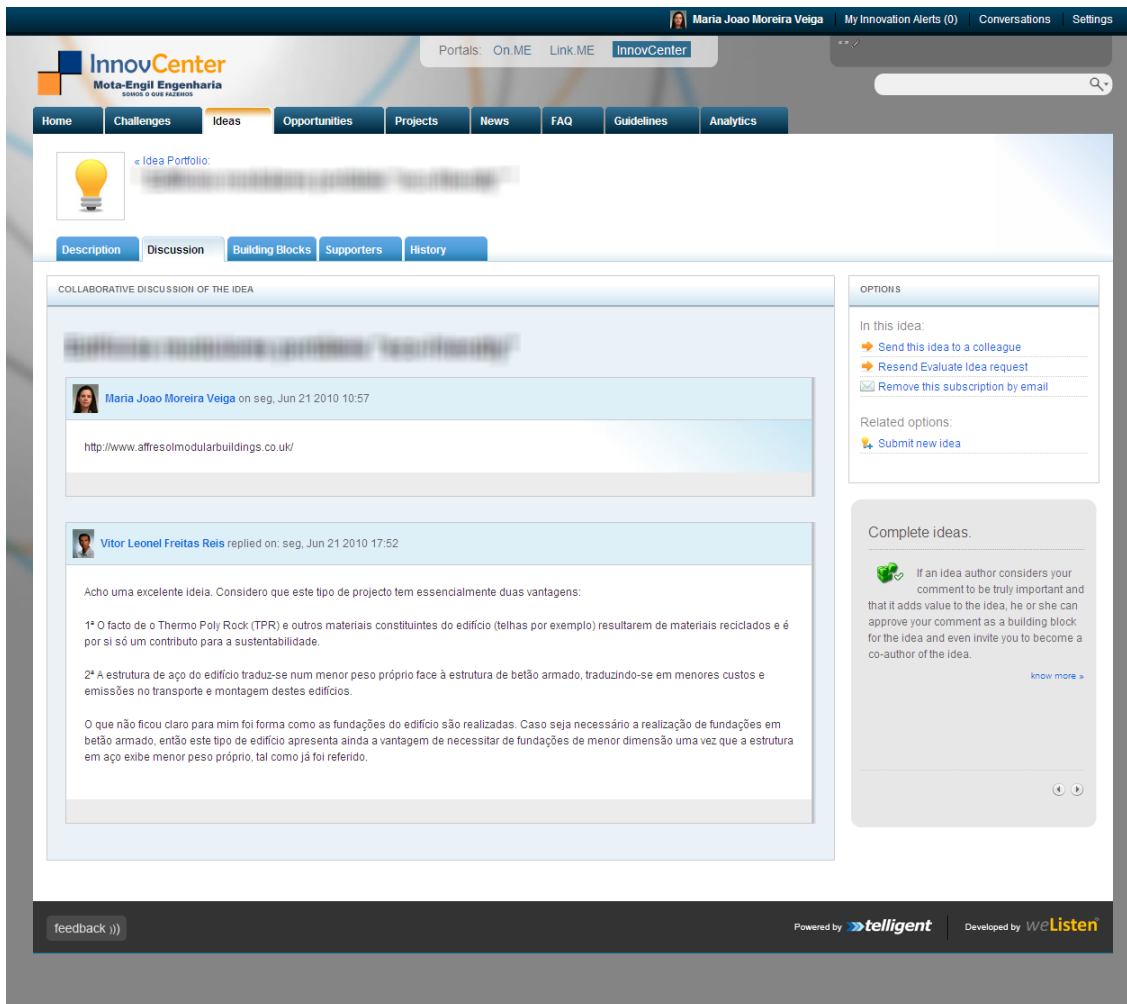
Remarks

Idea Attachments
• prêmios.jpg

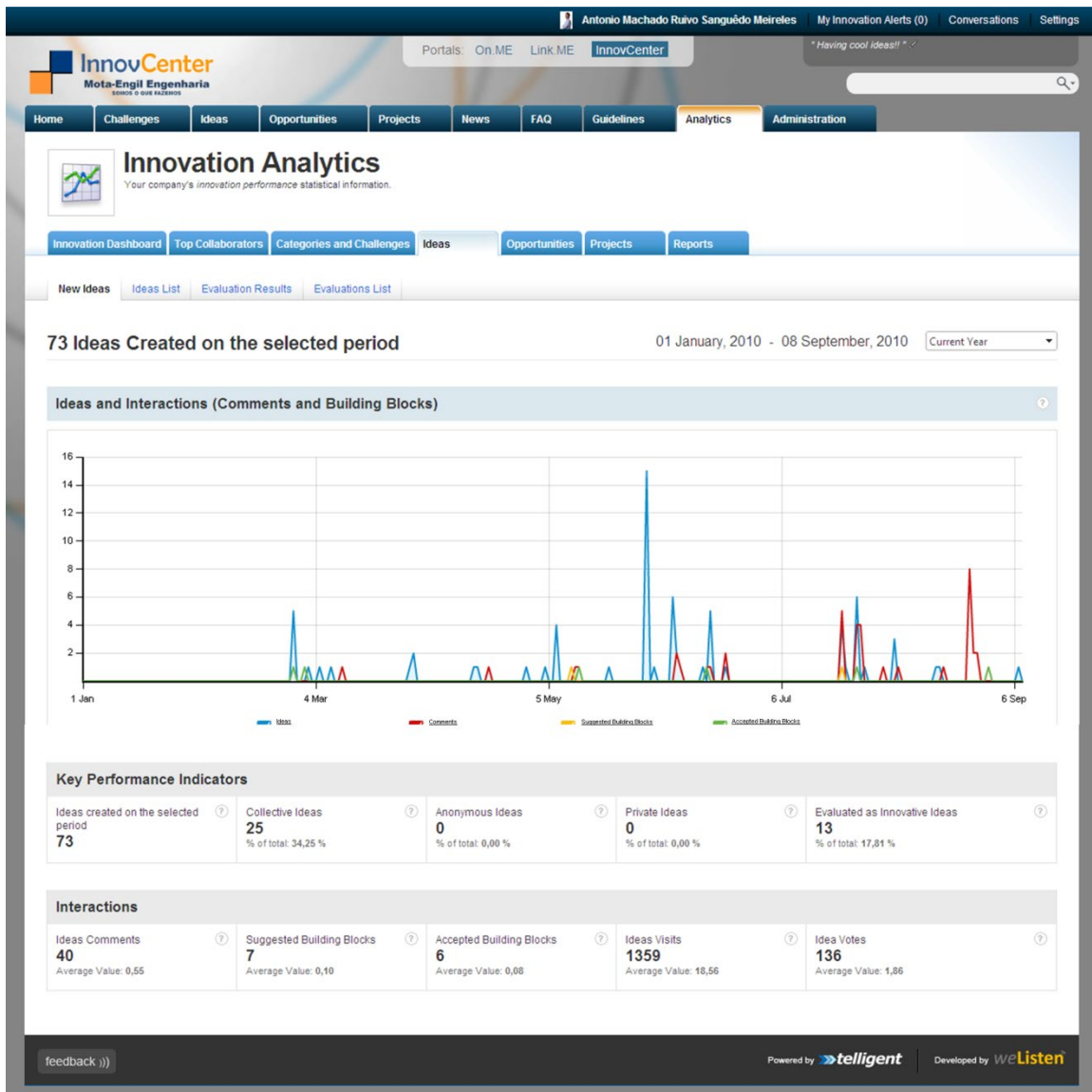
feedback)))

Powered by **telligent** Developed by **WE Listen**

Pictured: The *Description* tab displays the general information about the idea. This includes details such as description, benefits, problems solved, target, the authors (main author and co-authors), the number of user interactions (votes, visits, comments, supporters), and the number of days left to discuss the idea (until it is submitted automatically for evaluation).



Pictured: This screen shows where the community discusses an idea, with the goal of improving and completing it.



Pictured: An *Analytics* dashboard that lets Innovation team members monitor idea creation. They use this feature to find out how many ideas are coming in and what kind of interactions are happening around them during a specific time period.

- **Encouraging Participation.** Because the platform is collaboration-based, it is important that all users feel comfortable participating freely in adding and changing information. The system gives users plenty of visual feedback along the way to help them feel comfortable with their actions.

Team members can track those changes and see the evolution of a field as users change and amend it. Team members can also view all changes made to any field and compare them with the values that were approved when the opportunity was evaluated, therefore avoiding any data loss.

The screenshot shows the 'Link.ME' interface for an innovation project. The main section is titled 'Milestones (control points)' and lists eight milestones (M1 to M8) with their status and dates. A yellow bar at the bottom indicates 'Showing changes vs approved values (read-only)' with a legend for changed, added, and removed items.

Milestone	Status	Date
M1 : Relatório final de Avaliação diagnóstica	Approved (without deviations)	30-06-2009
M2 : Ponto de situação - Programa tutoria	Approved (with deviations) by the Project Owner	15-10-2009
M3 : Ponto de situação - Condução de Obra	Approved (with deviations) by the Project Owner	30-10-2009
M4 : Ponto de situação - Comunidade analistas e topografos	Approved (without deviations)	15-11-2009
M5 : Ponto de situação - Processo de GC + Sistema de Reconhecimento	Approved (without deviations)	15-12-2009
M6 : Formação Coordenadores	Approved (without deviations)	23-04-2010
M7 : Avaliação Intermédia Comunidade de Topógrafos	Approved (without deviations)	31-05-2010
M8 : Estrutura Inicial de Link.ME	Approved (without deviations)	18-06-2010

Pictured: If users want to see the changes of a given value and compare it to the approved values, they simply click the *Show changes vs. approved values* link. This will toggle the *showing changes* mode, displaying small icons beside each value, indicating if it was added, changed, or removed since the approved values. To ensure that users are aware that they're in this mode, a horizontal yellow bar is shown at the bottom of the screen with a legend for each icon (changed, added, removed item). This is meant to warn users that they're in a read-only, show-changes mode. If users click one of the change-tracking icons besides a value, the change log for that value is shown, with the time, date, author, and content of that change.

- **Project Closure: Outcome and Impact Analysis.** The *Project Closure* page is available throughout the project, so team members can track their efforts. This is intended to provide an iterative snapshot of lessons learned and track results and impacts. This information gives team members a collective notion of how well the project is going and gives them answers to questions such as *Is our project on time? Are we over the planned budget?*

The *Project Closure* pages show qualitative and quantitative indicators, partially achieved or not achieved at all (with the corresponding supporting

information). And an open-text field is available where users can contribute thoughts on the results.

In the *Project Schedule Balance* area of the page, the planned start date, end date, and duration are shown and automatically compared with the actual values (based on the project scheduling and task management). As the screen below shows, and deviations are shown in red.

An important part of *Project Closure* is the *Cost Balance*, which compares all costs in various columns: approved (when the opportunity was approved and a project was created), planned (any budget changes that occurred during the project), and effective (the actual costs). A fourth column shows the delta between what was actually spent and what had been budgeted. The *Cost Balance* area shows all planned and new costs, including entries that had been approved but were later removed from the budget, providing both the team and the company a clear financial view of the project.

Another section of this page allows the team to rate (from 1–5) the value added by the partnerships (protocols and contracts). And finally, the page also shows project balance and lessons learned.

Before a team can actually perform project closure, many project rules must be respected (for example, all project milestones must have a validation result). As on the *Opportunity Evaluation* page, when users enter this page, they see a red area that shows anything that's missing. All warnings have "take me there" links to take users to the place where they can correct the warnings.

Project Closure

1. Qualitative and Quantitative Results / Impacts

Expected Qualitative Results / Impacts:

Quantitative Results / Impacts:

2. Scope and Quality Results

Project Scope results:

Project Quality results:

3. Project Schedule Balance

Project Duration:

4. Cost Balance

	Approved	Planned	Effective	Deviation
Consultancy Budget	5,00 €	5,00 €	5,00 €	0,00 €
Equipment Budget	5,00 €	5,00 €	5,00 €	0,00 €
Tests Budget	5,00 €	5,00 €	5,00 €	0,00 €
Others Budget	5,00 €	5,00 €	5,00 €	0,00 €
Consultancy, Equipment, Tests and Others Budget Total	5,00 €	5,00 €	5,00 €	0,00 €

	Approved	Planned	Effective	Deviation
Human Resources Budget	12 h	13 h	13 h	1 h
	12 h	13 h	13 h	1 h

5. Partnerships Evaluation

Partnerships - Protocols:

Partnerships - Contracts:

6. Final Balance and Closure

Project's Final Balance:

Lessons Learned:

The project was a Failure

The project was a Success

Project Followup:

Completed

New Project

Integration and Exploration

Submit your choice

Save Project Closure

Pictured: The *Project Workspace/Project Closure* page. The screen is divided into several containers, organized contextually (qualitative and quantitative results; scope and quality results; project schedule balance; and so on). Each container has a link to take the user directly to the corresponding project page or section. For example, the *Cost Balance* container has a link to the budget section of the workspace.

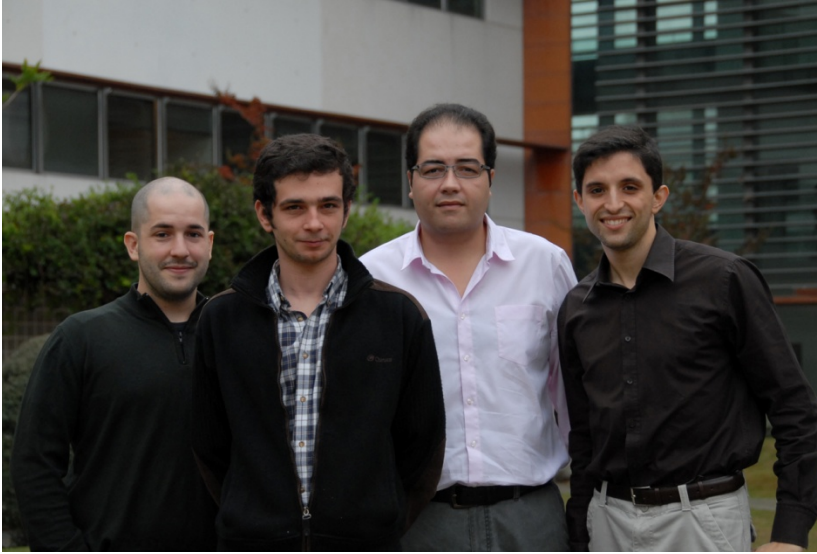
TIMELINE

INTRANET TIMELINE	
Milestone Date	Milestone Description
March 2008	First intranet
November 2009	Proof of concept released during development phase
August 2009—March 2010	Redesign
May 2010	New intranet launched
May 2010	Presentation of new intranet to individual departments
September 2010	Launch of new report features

INTRANET TEAM



Pictured: Mota-Engil team members: (left to right) Rui Campos, Ines Barbosa, Antonio Meireles, Maria João Veiga, Rui Rocha, and João Ribeiro Pinto.



Pictured: WeListen team members: (left to right) Bruno Lopes, Ricardo Lapão, Carlos Mendes, and Leonardo Varella-Cid

GOVERNANCE

Ownership

InnovCenter is the responsibility of Mota-Engil Engenharia's Innovation Department (nINOV) which is under the Direction of Performance, Technology, and Innovation.

nINOV is responsible for innovation at Mota-Engil Engenharia, and is recognized as the group with the most knowledge to lead the process.

The company's Board of Directors sponsored the project right from the start, which Meireles says helped to coalesce and motivate more people to participate.

"The close relationship between nINOV and the company's Board of Directors fostered a strong working relationship between the two groups," he says. "The fact that the Board sent a personal letter to each user asking them to participate helped the organization understand the importance of innovation and this action was only possible due to the close relationship between nINOV and the Board."

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
InnovCenter Team	• Provides governance, program management, coaching, support, and evaluation of direct country managers • Responsible for the content and features available at the group intranet level
Innovation Local Manager	• Local managers are responsible for the intranet at their own department level, including: ○ Promotion ○ Training and support ○ Control of the quality of the content
Content Owners	• Responsible for their own section's updates and consistency • Can delegate some updates and changes to other members of the team/department

USERS

The platform is being rolled out to users across the company in a slow, thoughtful manner, one group at a time. The team says it would rather do it right, than do it in a hurry.

"The primary purpose of *InnovCenter* is to support our innovation management processes," says Meireles. "And this is something we're committed to get right. We know that we won't increase our company's innovation capability just by deploying a new intranet, and as such, we are getting users on board gradually."

The first groups, in Portugal, will have access to core functional areas including technical areas and job sites. Later, users across the organization, globally, will be invited to participate.

Seventy percent of the users are engineers, including technicians and directors. All the Board members have access and can visualize information on all projects. The other 30 percent of users includes all other technical functions, some executed by people who have never had previous contact with a computer (such as laboratory and field technicians).

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	http://innovcenter.mota-engil.pt
Default Status	The company has several intranet applications; the major one is ON.ME, the business intranet, which is configured by default as the homepage. <i>InnovCenter</i> may be the homepage of many users, but not all. Mota-Engil employees have control over their own workstations and thus are not forced to have company intranets as their default homepages. One of the company's biggest challenges is to integrate all platforms in the users' work environment and make the switch between them seamless. To achieve this, the intranet team introduced the concept of a link bar, which gives users a quick and transparent way to switch between a portal and other work.
Remote Access	Remote access is available, but the costs involved are considerable, so it is not available to all users. The remote access requires special equipment to provide a secure connection to the company. The company's IT department is considering less expensive alternatives.

DESIGN PROCESS AND USABILITY WORK

Project Goals

InnovCenter integrates the whole Innovation Management Cycle, from the transformation of the RDI strategy into challenges (the organization's problems, needs, and opportunities) to idea management and the materialization and management of the innovation projects. So, the goals for the *InnovCenter* were simple ideas that were complex to execute in an online environment.

"We envisioned an online place for all employees to engage in whole the innovation process, from ideas to value," says Meireles. This meant creating a platform that would help foster the following activities:

- Challenge the whole organization, and let everyone submit ideas for innovation
- Let users vote on and discuss the ideas being brought forth
- Provide the means to leverage the best of those ideas into innovation opportunities and innovation projects
- Support the management of project execution, from start to completion, using the same single platform

"We wanted everyone enrolled in Innovation as something that's part of the way we try to do business, which is an ambitious yet rewarding notion in itself," he says.

"*InnovCenter* offers areas for discussing ideas, templates that support the management of innovation projects, forums, wikis, blogs, as well as notifications and advanced analytics tools," says Meireles. "The entire tool relies on the employee's feedback, on his/her recognition (through a points system), and on the transparency of the information."

Deciding on an Approach

They say that admitting you have a problem is the first step to getting help. And that was the case for the Mota-Engil intranet team.

"First off," says Meireles, "we knew our major pain-points. We were already experiencing the difficulties entailed in not having a company-wide space for innovation."

Among the challenges they were facing were:

- Few people were engaged in the company's innovation process
- There was no common means for company-wide conversation involving all 17 countries in which Mota-Engil operates
- There was no aggregated information on what's happening, innovation-wise, throughout the company
- There was no means to effectively provide collaborative project management tools

"These were concerns we, at the Innovation Management department, were already aware of," he says.

The design team conducted brainstorming sessions with many of the departments and business areas most involved in the innovation process, in a joint effort to define areas to focus on and unearth additional requirements.

A detailed product specification emerged from this aggregate feedback. Although the team tried to find an existing solution, none existed, so they decided to build their own.

"We tried to find an off-the-shelf platform that would suit our needs of managing innovation inside our company in a systemic and comprehensive way," says Meireles. "But in the end, we decided to build our own solution. Although we weren't able to find an ideal match, we learned a lot through this process."

The company's agency partner, WeListen, also proved to be a font of useful suggestions, pushing for clever functionalities and creating a great user experience.

Facing Challenges

User involvement is the key to getting any intranet initiative off the ground. This is a time-tested truth, and the Mota-Engil team found it both true and a challenge to carry out.

"It is imperative to enroll people right from the start," says Meireles. "Listening to their needs and recurring unsolved issues. That kind of dynamic requires quite a bit of managing effort and high-level sponsoring."

"Another difficulty we had to tackle is the ever-changing nature of software requirements — *InnovCenter* being no exception, especially because we were enthusiastically finding new improvements all the time," he says. "It required an agile approach to development and an increased attention to the importance of starting off with the right set of features."

Choosing an Agency Partner

As mentioned above, the Mota-Engil team chose to work with WeListen as a technology/consulting partner. This was in part because the agency provided the type of technical expertise required for such an ambitious project, and in part because WeListen added valuable ideas to augment the team's own ideas for the project.

"We needed to extend our technological collaboration infrastructure to meet our specific needs for innovation," says Meireles.

And, like many companies working with agencies, the Mota-Engil team found the relationship to be very successful and very collaborative throughout. WeListen's involvement in creating *InnovCenter* ranged from concept and strategy consulting to design, development, and implementation.

"Working with WeListen was a collaborative process itself. We teamed with them in defining the tools to support our innovation process," says Meireles. "Our conversation was continuous and both parties were involved throughout the whole process."

Success has come in terms of both project success for *InnovCenter* and also for taking that work and leveraging it for a larger audience outside of Mota-Engil.

Based on the success of the Mota-Engil project, WeListen has productized its joint effort and turned *InnovCenter* into a commercially available innovation platform: InnovationCast.

"We continue to partner with WeListen by providing them with our input on innovation management and being a valued customer of InnovationCast and its roadmap," says Meireles. "They were involved from the beginning and continue to partner with us in improving their software, InnovationCast, which is the productized version of what they created with us."

Gathering Requirements: In Stages

In a company that has been in business for more than 60 years and operates in 17 countries (which inevitably means different cultures), it is imperative to have a platform with a user-tested, intuitive interface. Sometimes achieving that level of usability is a process, not a destination.

"We're proud of *InnovCenter*'s user experience, but — as always — it wasn't a hole in one," says Meireles.

Until 2008, despite Mota-Engil's commitment to innovation, information was managed in a non-structured way, mainly with Word documents and Excel spreadsheets.

How innovation (and knowledge) are managed within an organization can greatly impact the way a company thinks and works. So, one of the major challenges is to support purposeful collaboration among a dispersed workforce. This wasn't new to

the Mota-Engil team, but something they needed to keep reminding themselves about throughout the project.

"We must bear in mind that when we're building something, it is not for us but instead for our users," says Meireles.

With this in mind, in 2008, the company launched a project aimed at developing Mota-Engil's innovation competencies and processes.

At first, this effort was aimed at supporting those processes through the use of free and open source collaboration tools, such as Ning, Wetpaint, and a previously free version of Telligent Community Server in an effort provide structure to the innovation process.

"The major point at this time was to get feedback from the users and understand how we could further support their innovation-related work," says Meireles. "During this initiative, we've learned what was necessary to have in place."

That effort results in the following list of components for the new innovation platform:

- **Challenges:** People like to be challenged and said they prefer to contribute to Mota-Engil's innovation on a regular basis by addressing existing business problems or opportunities.
- **Ideation:** Further support collaboration throughout the Ideation phase by providing the means to collaborate on ideas.
- **Turn ideas into opportunities:** Further develop and study ideas to find out if they are truly innovation opportunities.
- **Recognize and reward:** Recognize and reward user engagement in innovation.

Through this requirements-gathering phase, the team also learned that they should take an integrated approach to innovation management. During some sessions and interviews, users mentioned two "problems." The first was related to the use of several platforms: users had to enter the same information multiple times. Second, people didn't seem to know what happened to their ideas.

"We didn't have an integrated view of Mota-Engil's innovation funnel," says Meireles.

"We don't develop platforms for ourselves but for our users," he says. "By involving them in this initiative, and with the proof-of-concept approach, we started our innovation journey's next step: building *InnovCenter*."

Iterative Design: Keeping the Users Involved

User involvement continued throughout the project. And that involvement had a big impact on the direction of everything from the design to the rollout.

"Once we began the *InnovCenter* project, our initial layouts were quite different, both visually and functionally," says Meireles. "The related actions menu was on the left side and the color scheme was different."

After some beta testing, they found it was important to users that the portal's colors matched the corporate identity. This reinforced the importance of innovation for Mota-Engil. Also, they moved each screen's actions area to the right side, leaving the

larger, main area on the left and center, which was a more intuitive design choice for left-to-right readers (their target).

The team found that beta testing proved to be one of the most effective tools in their project toolbox. The beta group represented the larger cultural preferences of the platform's target audience, and they were able to make changes from what they learned.

Providing a Mechanism for Feedback

A feedback link on every page provides users an opportunity to provide suggestions to the intranet team. But the objective is twofold.

"We want to facilitate communication with our users," says Meireles. "They can provide suggestions or even just let us know about something that they really like in our intranet."

But the link also provides an easy way for users to report any difficulty or errors.

Using Enterprise 2.0 for Innovation

Another aspect of keeping users involved is to give them tools that let them actively participate in the platform. And nothing does that as well as the popular Web 2.0 tools widely available on the Web.

Mota-Engil uses some of these tools in an enterprise context to encourage connectivity within the organization. These tools are employed in an effort to reduce the noise and improve the signal.

"As you'd imagine, in a company with more than 9,000 employees, information overflow can become a showstopper," says Meireles, adding that users can select a list of friends and filter the information they see in the microblogging tool (described below) accordingly. "And the team uses a wiki to showcase and build on its innovation process."

The site's guidelines section is a wiki that describes the company's innovation process. Using such a participatory tool was a deliberate decision.

"One of our main aims is to ensure that our innovation management process is transparent and well understood by our company's collaborators," says Meireles. "It is constituted by different sections, where the different concepts that compose our innovation process are explained (such as challenges, ideas, opportunities, projects, etc.)."

It also doubles as a valuable tool that can be used in training or other sessions about the innovation process.

Users can rate or bookmark any page in the guidelines wiki, as well as comment on any page if they have doubts or suggestions. This feedback mechanism is critical to the process: the suggestions are heard. The innovation management department subscribes to all content and helps to keep the conversations going. And it provides a platform to build institutional memory.

"Moreover, since it is a wiki," says Meireles, "it enables us to keep the changes to our innovation management process through time working as our company's memory about such process."

Beyond the wiki, the site also features a microblogging tool that users can access from any page (on the screen's right-hand side). The comments generated through this tool can be seen in the *Activity Stream* by anyone using the platform.

The screenshot displays the InnovCenter website interface. At the top, there's a navigation bar with links like Home, Challenges, Ideias, Opportunities, Projects, News, FAQ, Guidelines, and Analytics. Below this, the 'Inovação' section is highlighted, featuring a sub-navigation bar with Home, Blog, Forums, and Wiki. The main content area shows a flowchart titled 'A - Fluxo de Informação do Sistema de Gestão do IDI'. The flowchart starts with 'Desafios' (Challenges) leading to 'Ideias' (Ideas), which then leads to 'Avaliação' (Evaluation) and finally to 'Oportunidade de Inovação' (Innovation Opportunity). The flowchart includes various stages and roles, such as 'Projecto de Integração e Exploração', 'Projecto de Inovação', and 'Projecto de ID'. A legend on the left identifies roles like 'Responsável do Desafio', 'Autor da Ideia', 'Responsável pelo estudo', 'Responsável pela avaliação', and 'Gestor do Projecto'. On the right side, there's a 'TABLE OF CONTENTS' section listing various topics like 'Fluxo de Informação do Sistema de Gestão do IDI', 'Manual do utilizador do InnovCenter', 'Desafios', 'Ideias', 'Oportunidades / Projectos', etc. Below the table of contents, there's an 'OPTIONS' section with links like 'Email subscribe to this page', 'Send to friend', and 'Favorite this wiki'.

Pictured: This screen shows the *InnovCenter's* guidelines section. A wiki is used to house this content, which describes the company's innovation process.

CONTENT AND CONTENT CONTRIBUTORS

Measuring Contributions by Ideas Rather than Users

Because the content generated in the *InnovCenter* is not traditional intranet content, but rather part of a process, content management is measured more by contributions and community activity rather than by numbers of users.

That said, so far, approximately eight directors and 500 employees have contributed content to the platform. But, more importantly, these users have generated more than 70 ideas in just the first months of the platform's launch. Of those 70 ideas, nearly 44 of them have evolved through the process to become *Innovation Opportunities* (the maturation phase of the process). Of those, 37 have spawned innovation projects that to date are either in progress or have concluded.

Anyone can contribute to the platform and is a potential user, but as mentioned earlier, the team is purposely rolling out access in controlled waves to ensure support in integrating the tool into each successive team's process.

Content is not moderated per se. The Innovation team is responsible for all activity that takes place on the platform, and they weed out bad behavior if and when it emerges.

On-Boarding with Purpose

Users are given guidelines with general information about how to use the intranet and templates.

But more important than these guidelines is the way the Innovation team introduces users to the platform. Their goal is to make innovation an integral part of each user's work.

"We've been promoting some creativity sessions where people can discuss ideas and challenges," says Meireles. "Then we invite them to submit such ideas and challenges onto the platform. In doing so, we want to make sure that they have a streamlined experience in their first contact with the platform."

Feedback is important when users are contributing to the platform, and the team takes great care to provide that feedback at pivotal points in their experience.

"Since the beginning, we knew that feedback was a very critical point," says Meireles. "If you want someone to contribute, you need to give them feedback about their actions."

By acknowledging this, one of the requirements for the development of *InnovCenter* was that the platform would have to automatically generate emails in critical points of the flow. With those emails, everyone has feedback about the evaluation of their actions, and more important, they know who made the evaluation.

It was critical for the team to launch with a site filled with relevant content; so, prior to site launch, the Innovation department seeded the initial site content.

TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and O/S	- Virtualized Server: Windows Server 2003 R2 Standard Edition SP2 - Intel Xeon CPU X5355 @ 2.66Ghz 1 GB RAM
Bug Tracking/Quality Assurance	PivotalTracker
Design Tools	- Adobe Photoshop - Adobe Illustrator - Paper and pencil - Whiteboard
Site Building Tools	- Microsoft Visual Studio 2008 - Microsoft SQL Server Management Studio
Content Management Tools	Telligent Evolution Platform, Enterprise Version
Search	Solr

SEARCH

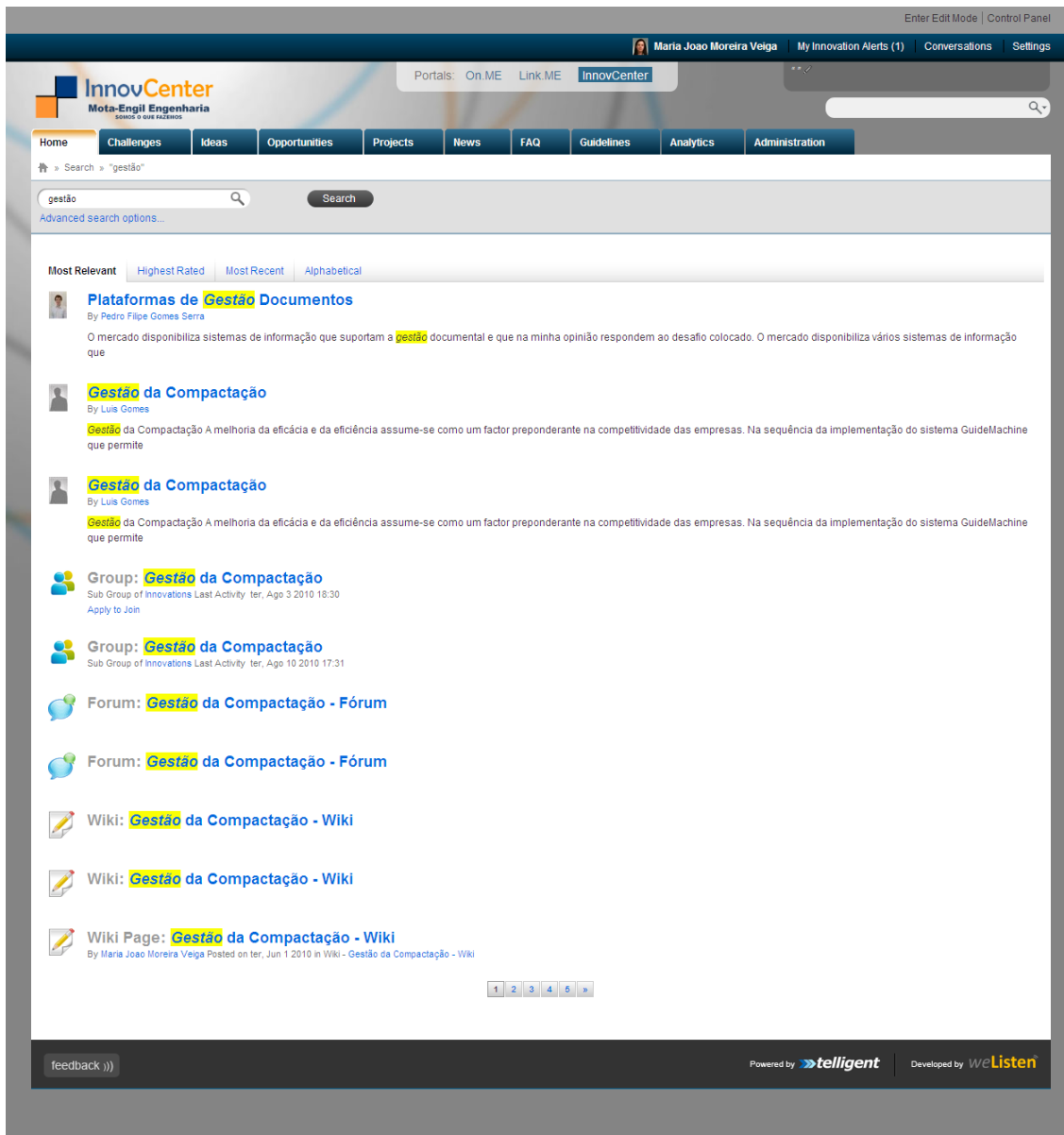
InnovCenter was built on Telligent Enterprise content management system, which uses Solr as its search tool, therefore that is the search tool in place on the platform. It is used out-of-the-box and integrated with the platform's major components, including communities, people, forums, wikis, blogs, files, and pages.

The site-wide search lets users look for challenges, ideas, innovation opportunities, and innovation projects, or some combination of those (such as ideas posted by a specific user). And the search is used to warn people submitting new ideas if there are similar ideas that already exist.

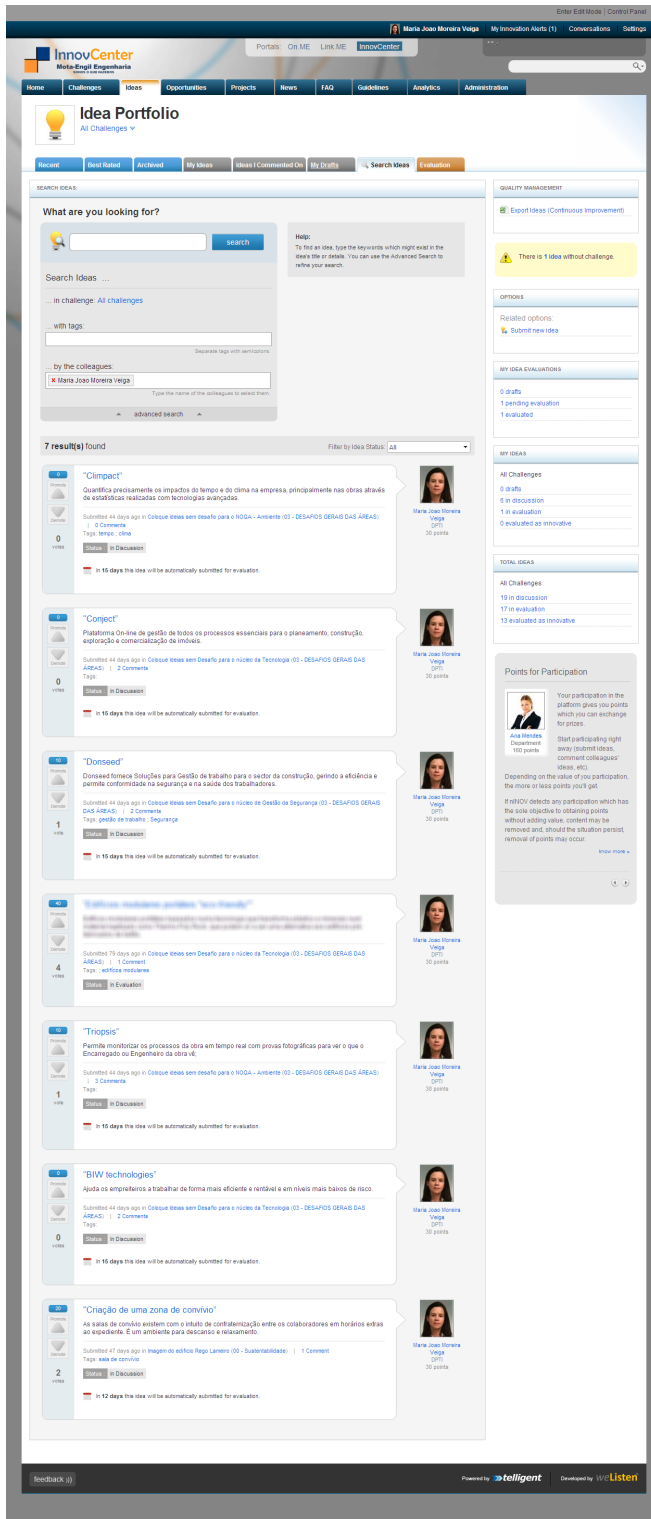
"Using our comprehensive search, when the user is submitting a new idea, we match the entered text against existing ideas and show ideas whose similarity is over a certain threshold," says Meireles. "In that case, the submitting user is invited to reconsider their submission and instead take a look at those similar ideas, possibly submitting a *Building Block* that might further improve them."

In the future, the team intends to perform data mining using the search infrastructure. Competency management systems used in organizations are usually static, because users select a few areas where they have experience. The Mota-Engil team plans to mine participation data, linking users to specific areas as they work on different challenges, ideas, opportunities, and projects.

"We are still designing this new feature, but the general goal will be to find some trends that allow us to figure out what is the most important for our users and which functionalities they use more," says Meireles.



Pictured: The Innovation team maps information about innovation projects to the company's hierarchical structure. Each innovation project crosses several organizational boundaries and involves different divisions and/or different business or functional areas.



Pictured: The dedicated *Idea Search* is an advanced search that is specifically for *Ideas*. Users can perform full-text searches and filter by challenges, tags, authors, and idea status.

RESULTS AND ROI

Success Depends on How You Define It

Measuring the success of a platform such as *InnovCenter* is tricky — trickier even than measuring most other intranet projects (which are notoriously hard to measure). At least on an intranet, a company can often measure increased usage or user satisfaction as primary drivers. Mota-Engil had to dig a little deeper to make a use case for the platform's success.

Meireles explains one approach they took to gauge the impact of *InnovCenter*: "In our company, there have always been projects under all the directors. The problem was that each director was only aware of the projects that were developed within his own department."

A similar thing was happening to ideas: *To whom should I send my idea and get feedback about it?*

"This was a common question," he says, "with no simple answer in the organization."

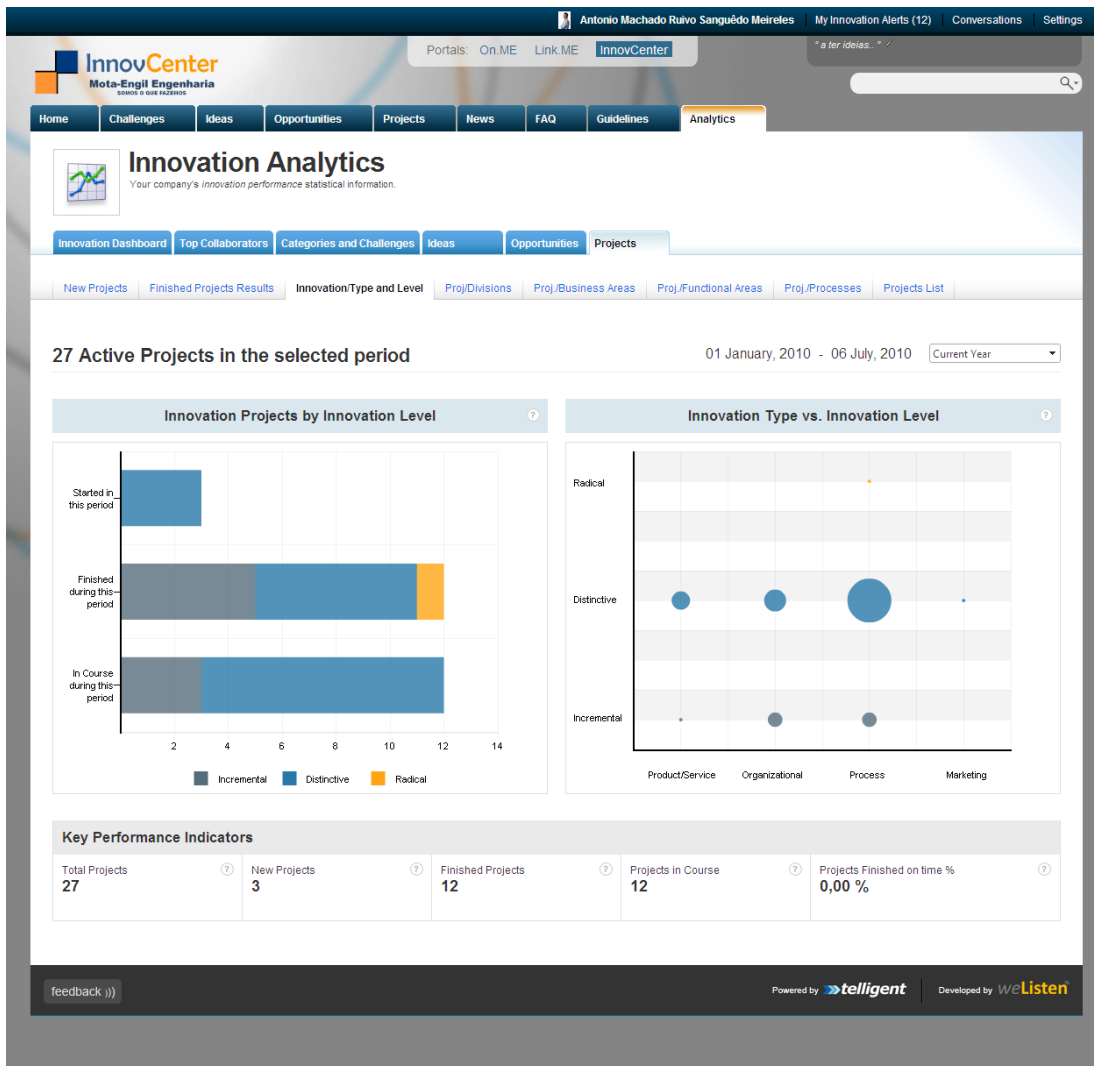
With *InnovCenter*, every director can now see all the projects that are being studied and developed across the organization, and specifically have an area that highlights all the ideas that have been generated.

"We are looking for innovative ideas," says Meireles, "but you will only know it is innovative if you submit it and wait for evaluation."

So, one of the biggest success measures in this context is to measure the quantity of ideas generated, even in the first few months the platform has been live. But another, more critical way to measure success is by evaluating how willing each department is to use *InnovCenter* as a tool to manage their ongoing projects and even to manage ideas that are merely being studied. And, while the tool is still in its infancy (only available since May 2010), all roads point to success on both of these counts.

Although the number of ideas are on the increase, the biggest positive result the team can point to is that now they have the ability to compile all the information on all the projects in one place. It's therefore possible to know, in real time, which projects are delayed or even find out how much money they've spent on them.

The ability to generate that kind of snapshot is a big win.

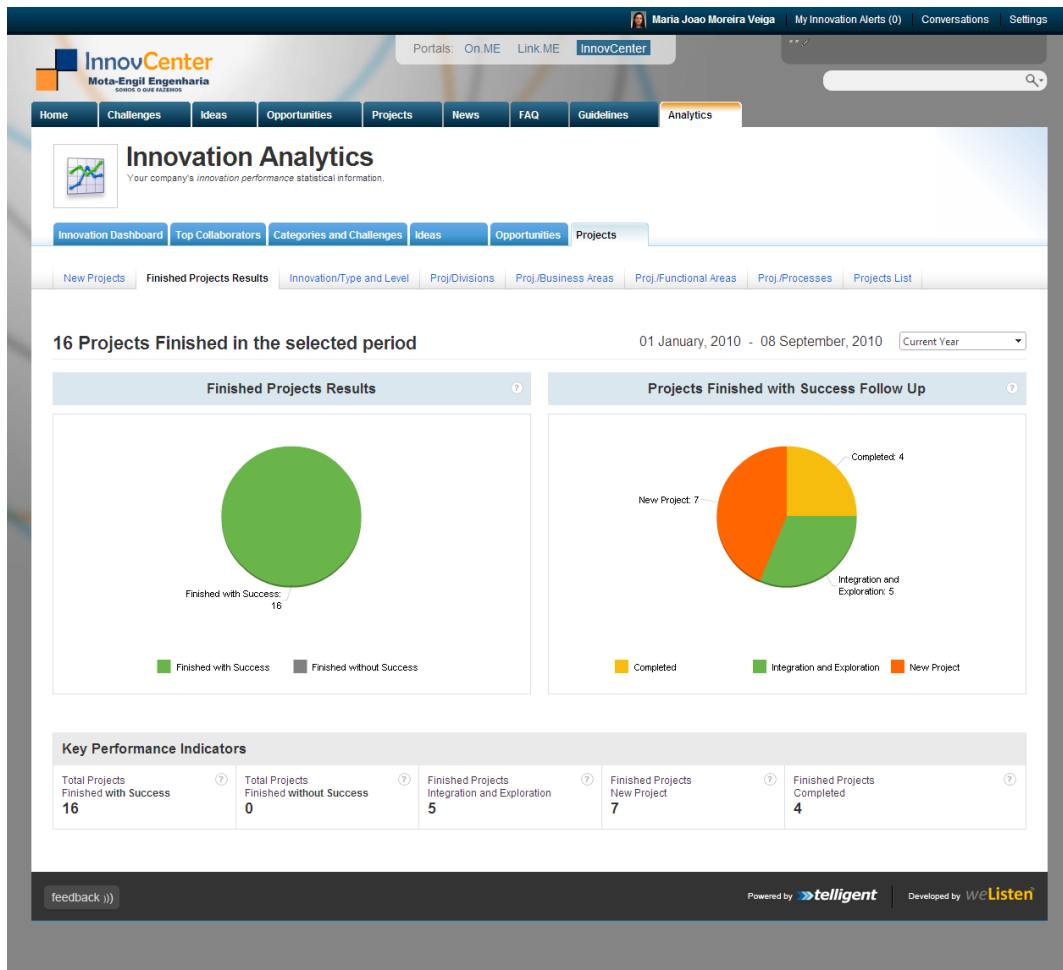


Pictured: Because *InnovCenter* has been available only since May 2010, it's premature to quantify its impact on company revenues. Thus, the team currently defines success in terms of usage: number of submitted ideas; number of innovative ideas; number of innovation opportunities; number of innovation projects. This screen shows some of these measures just a few months after launch.

Success by the Numbers

The team has generated a few hard numbers relating to site usage to date. And, so far, these numbers point to a huge increase in each aspect of the innovation funnel. To date, the site has generated:

- 39 Challenges
- 72 Ideas (77 percent more than last year)
- 44 Opportunities
- 38 Projects (60 percent more than last year)
- 1,345 Idea Visits



Pictured: The results of the completed innovation projects. This screen shows how many projects were finished successfully or otherwise. And, with this information, the team can gauge what will happen to each of the successful projects. Their results can be integrated in the organization or even originate a new project.

LESSONS LEARNED

A few things the Mota-Engil team learned along the way:

- **Choose well your development partner.** "It is important that they are familiar with the business context of the platform. This will bring other perspectives to the initial requirements. Make sure that you always involve the organization and choose a partner that is also interested in the project —and everything has a good probability of running well."
- **Involve users in design.** "Involve users across the company in stages of the design process. If the users are engaged in creating the layout, in the end the users will feel comfortable using it every day."
- **Collaboration is key.** "The collaboration process that took place throughout development made it so that, in the end, the product that we achieved was much better than the one that we had designed and specified."

CenturyLink Business (2012)

Using the intranet:

CenturyLink Business (previously Qwest Communications) is the third largest telecommunications company in the United States. The Business Markets Group provides broadband, voice, and wireless services to companies across the country. In addition, CenturyLink Business provides data, voice, and managed services through its high-quality advanced fiber-optic network and multiple data centers. CenturyLink is recognized as a leader in the network services market by key technology industry analyst.

Headquarters:

Monroe, Louisiana

Number of employees the intranet supports:

Approximately 2,000 for Business Markets

Company locations:

CenturyLink has multiple locations throughout the US, with the main offices in Denver, Colorado, and headquarters in Monroe, Louisiana.

Locations where people use the intranet:

United States

Annual sales:

Overall company sales of \$18.5 billion (year ending December 31, 2010)

Design team:

Four people formed the core in-house team. EffectiveUI worked with the CenturyLink team to conduct usability studies and write the overall redesign plan, which Peak Systems implemented. Peak Systems continues to maintain the site and upgrade it with new features.

Members:

In-house: Jeff Hansen, Business Markets Intranet Manager; Emily Puffett, Group Manager, Digital Marketing; Timberlyn Wilson, Marketing Manager, Sales Collateral; Bruce Black, Manager, Sales Collateral; Brenda Van der Steen, Group Manager, Content Strategy; Bob Christopher, Senior Marketing Manager News Section; and Beth Cossette, Senior Marketing Manager Social Media

EffectiveUI: Erika Oliver, Account Director; Michael Salamon, Lead Experience Architect; Brad Umbaugh, Senior Developer; and Shelley Washburn, Senior Project Manager

Peak Systems: Rick Wangen, Owner/Project Manager; Rhia Bucklin, Designer; and Jeff Lewis, Senior Developer

SUMMARY

Sometimes, fixing an intranet with issues might seem like an insurmountable task, but the CenturyLink Business intranet team turned lemons into lemonade. Group members kept their wits about them and clearly defined the issues and goals, which started them on their way to designing what would become a supreme intranet for supporting sales.

The core of most business is the sales team. If not for sales people, there would be no customers, so if they can't effectively do their jobs, there can be serious ramifications. The intranet designers—likely to their chagrin—found that on the old intranet, sales people could not do some fundamental tasks, such as finding thorough, up-to-date information about the products they are selling; locating well-organized documents with information to help them make a sale; and discovering product promotions.

In fact, when the designers researched several sales-related tasks, they discovered that it took people, on average, seven clicks to find critical information. Although UI people are not typically in the business of counting clicks, we are in full agreement that information about core work should be easy to find and access.

In addition to failing salespeople in their quest to find product information, the intranet also failed to provide contact information for product managers, whom the sales people needed to speak with to get the information.

The new intranet's main goals went far beyond just fixing the previous intranet's issues. They involved thoroughly supporting the nearly 2,000 Business Markets sales professionals and support personnel nationwide who sell to businesses (not the consumer side). Designers wanted to keep content current, streamline each user's workflow, and improve the likelihood that users would quickly find the collateral and information about the products and promotions they need.

The spirited intranet achieves those goals right on the homepage, offering industry news, cross-sell and up-sell opportunities, and links to technical resources. To beat competitors to the punch, the homepage links to competitive assessments, as well as information on what analysts are saying about CenturyLink. *Top Tools* are showcased in the right rail, as are channels, a link to the calendar, and links to social networking features, such as the organization's ThinkGig blog and Twitter feed.

Breadth of Service Assets Refreshed

The Breadth of Service, Breadth of Service (2-Pager) and Pro Services Breadth of Service assets are now available on the Why CenturyLink site. Click for more details.

More New Collateral...

New Launches

New Collateral

1. Why CenturyLink Presentation Refreshed and Rebranded
2. Breadth of Service Assets Refreshed and Rebranded
3. New! Value Briefs Are Now Available!

Top News

Business Markets Awards

WEB CALENDAR

[GO](#)

Channels

[GES >](#)

[CenturyLink Federal >](#)

[Mid Markets >](#)

[Alternate Channels >](#)

Top Tools

[All Tools >](#)

[2011 Booking Guidelines >](#)

[eBizBuilder >](#)

[Einstein >](#)

[Harte - Hanks >](#)

[Hoovers >](#)

[Intelligent Order Form >](#)

[IUT \(Business Markets Intranet Intake Form\) >](#)

[Jigsaw >](#)

[Learning Q >](#)

[LexisNexis Prospecting >](#)

[SalesForce and Q.Central Single Sign On \(SSO\) >](#)

[SalesForce.com >](#)

[ThankQ Gift Store >](#)

[Voice of the Customer >](#)

[VoIP Quoting Tool \(VQT\) >](#)

Solutions

By Industry:

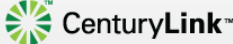
- Healthcare
- Retail

Bundles:

- Voice
- Voice & Data
- Internet/Data

Service Assurance

Is your customer interested in knowing about the account support they will receive from CenturyLink? If so, click here to find materials that communicate CenturyLink's commitment to service. [Learn More >](#)



Why CenturyLink?

Get materials that help you build a unique story about how your customers could work. Power messaging tools, Why CenturyLink story and more. [Learn More >](#)



Products

- Account Management
- Bundles
- Business Continuity
- CPE
- Cloud
- Contracts
- Ethernet
- Hosting
- IP Voice
- Managed Applications
- Networking
- Private Line
- Security
- Traditional Voice
- Other

[View All Products A-Z List >](#)

Enhanced Services

Find out more about our value-added services that can help solve critical business problems your customers are facing.

- Security
- Cloud
- Business Continuity

New! Best Practices Online Community

The Best Practices Online Community is a cross-organizational, fully accessible online portal to share and store examples of tried and tested best practices for sales and support.



[Read More >](#)

Think Gig

An industry insights and technology blog.

[Considering Going to the Dark Side? The Hidden Costs of Dark Fiber 08/24/2011 >](#)

[Beyond Viruses and Bots: Real Risks You Might Be Missing 08/09/2011 >](#)

[CenturyLink Acquires Savvis 07/15/2011 >](#)

Intelligence Resources

Competitive Stay ahead of the competition by having access to competitive assessments, market share reports and the latest competitor product launches. [Learn More >](#)

Technical Find out more about the resources and the services that the National Technical Services team can offer you and your customers. [Learn More >](#)

Analysts Learn what Industry Analysts are saying about CenturyLink and what you can share with your customers. [Learn More >](#)

twitter

@CenturyLinkBiz

Thanks for the RT @interop. about 3 days ago

Ready for #interop New York? We are! See our special offer to get 25% off registration or a free Expo pass: <http://t.co/XleQSwR> about 3 days ago

Become an Ultimate Problem Solver before the long weekend: <http://t.co/sMTBP2> about 4 days ago

CenturyLink Intranet
Legacy CTL Work Tools
Legacy Q Work Tools

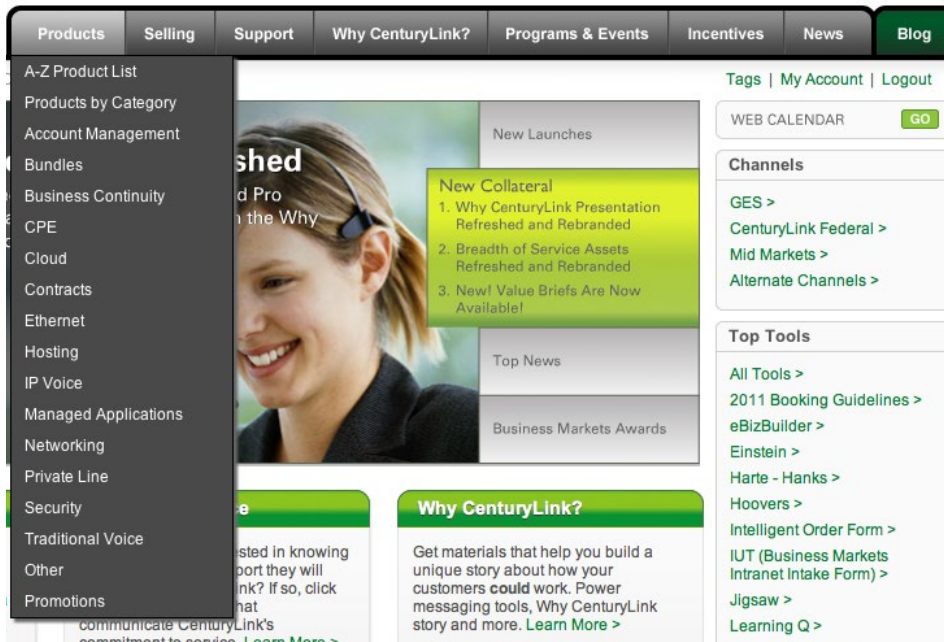
Corporate Directory

[FIND](#)

BMG PROVIDE FEEDBACK

Pictured: The CenturyLink Business intranet homepage supports the sales process right at the start, offering competitive and industry information, among other things.

The IA certainly has the sales force at its center, with *Products* as the first menu choice, followed immediately by *Selling*. Next, sales people can find help in the *Support* menu, followed by the *Why CenturyLink?*, which offers analyses and tips to help them understand their customers' needs and business challenges—and how CenturyLink can help solve them. The remaining menu items, including *Programs & Events*, *Incentives*, *News*, and *Blogs*, also house helpful sales information.



Pictured: The IA's top-level tier holds many sales-related topics, the first one being *Products*. The drop-down menu displays the product families, making information about them very easy to find.

Depending on the situation and person, sales people might sometimes look for product information based on product categories, and other times look for a product by name. Given this, it was a clever to add an *A-Z Product List* menu item as the first one in the *Products* menu. On this page, people can view all current products by category or alphabetically, selecting a navigation letter to jump to a place in the long list. Because products that are no longer available might still be important—especially to long-time customers—the products archive is also presented on this page. So, if a customer says, "In 2009, I was able to get Ethernet for my office locations for \$900 a month," the sales person can go to the old records and understand what the person is talking about. Archives can also help in doing competitive analysis, comparing something the organization used to offer with a competitor's product.

In the right rail, the *Product* menu items are repeated, making it possible for people to browse by product categories instead of product names.

Finally, designers took the opportunity to help sales people with *discovering*, which is, of course, different from *finding*. It's one thing to keep product information accessible and up-to-date. But what if the sales person doesn't know something exists? To address this, the designers created a banner box at the top of the page to enhance discoverability. This area houses important recent announcements concerning *New Collateral*, *Product News*, and *Featured Content*.

See What's New in Products and New Collateral

OPEN

Current Products by Category

[Current Products A-Z](#) | [Current Products by Category](#) | [Archived Products A-Z](#)

Account Management

[Control Center](#)

Bundles

[Bundles with Enhancements](#)
[Internet/Data Bundles](#)
[Voice Bundle](#)
[Voice & Data Bundle](#)

Business Continuity

[BillMate](#)
[Business Continuation Routing \(BCR\)](#)
[Business Continuity Solutions](#)
[Business Protection Service](#)
[eBill Companion](#)
[Online Backup](#)
[Real-Time Application Recovery/VSR](#)
[Self Healing Network Service \(SHNS\)](#)
[Storage and Backup Services \(Hosting\)](#)

CPE

[Centrex Compatible CPE](#)
[CPE](#)
[CPE IP Telephony](#)

Cloud

[Cloud Computing Solutions](#)

Contracts

[CenturyLink Line Volume Advantage \(CLVA\)](#)
[CenturyLink Line Volume Plan \(CLVP\)](#)
[CenturyLink Loyal Advantage \(CLA\)](#)
[CenturyLink Total Advantage](#)
[CenturyLink Total Advantage Express](#)

Ethernet

[E-Line](#)
[Ethernet Private Line \(Domestic\)](#)
[Ethernet Services](#)
[Metro Ethernet Private Line](#)
[Metro Ethernet - QC](#)
[Metro Ethernet - QCC](#)

Hosting

[Disaster Recovery \(Hosting\)](#)
[Hosting Collocation Services](#)
[Managed Services \(Hosting\)](#)
[Real-Time Application Recovery/VSR](#)
[Storage and Backup Services \(Hosting\)](#)
[Telco Collocation](#)

IP Voice

[Advanced Voice and Data Bundle](#)
[Integrated Access](#)

Products

[Account Management](#)
[Bundles](#)
[Business Continuity](#)
[CPE](#)
[Cloud](#)
[Contracts](#)
[Ethernet](#)
[Hosting](#)
[IP Voice](#)
[Managed Applications](#)
[Networking](#)
[Private Line](#)
[Security](#)
[Traditional Voice](#)
[Other](#)
[Promotions](#)

[CenturyLink Intranet](#)
[Legacy CTL Work Tools](#)
[Legacy Q Work Tools](#)

Corporate Directory

Search  [FIND](#)



[PROVIDE
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Pictured: Current products sorted by category.

See What's New in Products and New Collateral

[OPEN](#)

Archived Products

Jump to: # [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)
[Current Products A-Z](#) | [Current Products by Category](#) | [Archived Products A-Z](#)

A

[Asynchronous Transfer Mode \(ATM\) - International](#)

C

[Centrex 21](#)
[Centrex Plus](#)
[Commercial Video Service \(CVS\)](#)

E

[e-Messaging](#)
[e-Solutions Packages](#)

F

[Frame Relay International](#)
[Frame Relay Reports](#)

I

[International Data & IP](#)
[International Internet Port](#)
[International Offerings](#)
[IP Voice Home](#)
[iQ Unify](#)

O

[OneFlex Hosted VoIP](#)

P

[Private Line In-Region SRS](#)
[Professional Security Services](#)

Q

[Q.biz](#)
[Q.guaranteed](#)
[Q.integrity](#)
[Q Self Service Portfolio](#)
[Qwest Choice Bundles](#)
[Qwest IQ Home](#)
[Qwest Long Distance Advantage \(QLDA\)](#)
[Qwest Mobility](#)
[Qwest Voice Advantage](#)
[Qwest Wireless](#)

S

[Shared Web Solutions](#)

T

[Transparent LAN Service](#)

W

[Wholesale Dial](#)

Products

[Account Management](#)
[Bundles](#)
[Business Continuity](#)
[CPE](#)
[Cloud](#)
[Contracts](#)
[Ethernet](#)
[Hosting](#)
[IP Voice](#)
[Managed Applications](#)
[Networking](#)
[Private Line](#)
[Security](#)
[Traditional Voice](#)
[Other](#)
[Promotions](#)

Pictured: Archived products sorted alphabetically.

Once on a product's main index page, employees can see comprehensive information about the offerings. The solution name is listed at the top of the page, confirming what the person is reading about, followed by a short description. Then, the actual offerings are described.

The center of the page displays a carousel, making critical content visible and easily accessible rather than lost far below the fold or in a long page of prose. The tools in this section help sales people make B2B sales, which can take some time given the research and approvals required before businesses can sign on the dotted line. Knowing that the content they need will always be available on the intranet, even over the course of a longer selling cycle, gives sales people confidence in doing their job and makes that job easier.

The *Overview* gives a summary of the product. *Presentations* make giving a demo or speech about the solutions easier to prepare for and deliver. *Sell Sheets* give information and arguments to truly help the person make the sale. And *Customer Videos* give testimonials that the sales people can be inspired by and share.

The bottom of the page presents possible information paths to follow. After reading what they can about the details, a sales person might want to see what the organization is telling the public about their offering, and thus might go to the public-facing website, www.centurylink.com. Or, they might find it helpful to know which links are recommended to forward to potential customers. The *On CenturyLink.com/business* section lists short descriptions and links to pages, so the sales person doesn't have to hunt for them.

The *Solutions* page offers links to the products pages and to more resources. One section, *Upsell Opportunities*, makes good suggestions for other items a business might want to buy with or after a particular purchase. So, the intranet not only helps sales people make the initial sale, but it also helps them make additional sales as well.

[Back to Home Page](#)
[Products](#)
[Selling](#)
[Support](#)
[Why CenturyLink?](#)
[Programs & Events](#)
[Incentives](#)
[News](#)
[Blog](#)

[Tags](#) | [My Account](#) | [Logout](#)

Cloud Computing Solutions

From collocation to cloud computing services, CenturyLink offers your customers a collaborative approach to providing tailored solutions to meet the needs of your business. Help your customers extend their IT infrastructure with hosting, cloud infrastructure and application services.

Hosting

With CenturyLink Hosting solutions your customers get the benefits of a full-service hosting provider with the personnel, state-of-the-art CyberCenter facilities, security and support they need to keep their businesses up and running.

Cloud Infrastructure Services

CenturyLink's Cloud Infrastructure solutions offer your customers a fast and economical way to extend their IT infrastructure with a secure and reliable cloud-based platform to help set the pace of their business.

Cloud Application Services

CenturyLink offers Cloud Application Services such as Hosted Exchange, Hosted SharePoint, Online Backup, Web Hosting, AV/AS, Web Defense, DDos and Fax over E-mail that offers your customers access to advanced e-commerce capabilities, larger storage space, enterprise e-mail and more at affordable prices.

[Products](#)

[Cloud Computing Solutions](#)
View All Promotions

[Contacts](#)

[Bill McLeod](#)

[Recent Related News](#)

[GigaOm Customer Webinar](#)
8/10 29 days ago
[Gartner Magic Quadrant Report: Cloud](#) about 1 month ago
[New! Finding the Right Cloud Solution For Your Needs Whitepaper](#) 5 months ago
[Promo Highlights - Hosting](#) 6 months ago

[Overview](#)

[Presentations](#)

[Sell Sheets](#)

[Promo Slides](#)

[Customer Videos](#)

Hosting Product Suite Presentation (QBiz)
This presentation introduces CenturyLink's individual hosting solutions as a suite and an all-encompassing solution.

CenturyLink Compute on Demand Customer Presentation (QBiz)
Overview of CenturyLink's Compute on Demand Service

[TAGS](#) CLOUD

[On CenturyLink.com](#)

Cloud Computing Services
Use this page to point your customers towards more about our cloud computing offerings.

[Cloud Product Pages](#)

Hosting
Find out more about our Hosting solutions

Managed Applications
Find out more about our Managed Application solutions

[Resources](#)

Cloud Computing Webinar
Overview of CenturyLink's cloud positioning; what to sell today

Compute on Demand Presentation
Overview of CenturyLink's Compute on Demand service, plus updated positioning on Cloud Computing

What is Cloud Computing?
Simple overview of cloud computing from CenturyLink Small Business

Quick Guide: Is Cloud Computing Right for Your Business? (QBiz)
Whitepaper - Quick look at Cloud Computing Solutions

Is Cloud Computing Right for You? (QBiz)
White Paper - An IDC executive brief

CenturyLink Cloud - Based Services (QBiz)
White Paper - On-demand access to IT resources.

Reaching for the Cloud (QBiz)
White Paper - Based on custom research and a collaborative effort between CIO, Juniper and CenturyLink

Cloud Security: CIOs Have More Pressing Things to Worry About (QBiz)
Two page advertorial. Condensed version of the Reaching for the Cloud white paper.

Finding the Right Cloud Solution For Your Needs

[Upsell Opportunities](#)

Security

Contact Center Solutions

Real-Time Application Recovery

CPE

Professional Services

[CenturyLink Intranet](#)
[Legacy CTL Work Tools](#)
[Legacy Q Work Tools](#)

[Corporate Directory](#)
 [FIND](#)

[PROVIDE FEEDBACK](#)

Pictured: A product main index page has a description, links to related content, and presentation and sales tools downloads.

To keep up-to-date, users can view a page that summarizes all current promotions. The items expand and collapse in place for a quick overview. Information includes the name of the promotion, availability, details, type, and the products it applies to.

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WWW.NNGROUP.COM

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Current Promotions

[View Expired Promotions](#)

Want to get familiar with the latest promotions to share with your customers? Scroll down by category, and get the details for all active and current promotions.

[Expand All Categories Below](#)

Bundles

Advanced Voice and Data Bundle

Availability  

Details: Is a suite of services that align with CenturyLink's goal to provide simple voice and data solutions.

Type(s): Acquisition

Ongoing

Products:

[Advanced Voice and Data Bundle](#)

[Data Bundle](#)

[SIP Trunk](#)

[Voice & Data Bundle](#)

[View complete details >](#)

Purchase Plus Reward Promotion - Key Channel

Availability 

Details: Offer your key customers discounts when they increase their purchase agreements with CenturyLink Purchase Plus Reward.

Type(s): Acquisition

Ongoing

Products:

[Business Voice Lines and Packages](#)

[Integrated Access](#)

[Managed Internet Protocol Communications](#)

[Managed VoIP](#)

[Voice Bundle](#)

[View complete details >](#)

Business Continuity

CPE

Contracts

Ethernet

Hosting

IP Voice

Networking

Private Line

Security

Traditional Voice

Miscellaneous

Product pages often consolidate information that the analysts and sales people need to discuss with potential customers. These pages describe the promotions and discuss the benefits. Links to related products and news in the right rail are also helpful.

CenturyLink Business

Search this site

Products Selling Support Why CenturyLink? Programs & Events Incentives News Blog

Tags | My Account | Logout

Advanced Voice and Data Bundle

Promotions

2011 Fast Start Promotions—SIP Trunk Sessions, Hosting, E-Line, Delta Port, QWave (QCC and QC)
Fast Start your success across all channels to acquire more revenue and help your customer gain a competitive advantage using innovative solutions.

Advanced Voice and Data Bundle
Is a suite of services that align with CenturyLink's goal to provide simple voice and data solutions.

In-Region/In-Franchise (QC) Local Loop Discount Promotion
New Customers, or Existing Customers ordering additional locations, to CenturyLink IQ Data Bundle, Managed Data Bundle, Managed VoIP Bundle, or Integrated Access Package

New QC to QCC Customer Migration Offer
This promotion offers your customers an easy migration path to select new services without penalty for growing with Qwest.

Brings together local and long distance voice, data and equipment into a single affordable solution.

This product family includes the SIP Trunk with IP-PBX and SIP Trunk with IAD Bundles. Please go to the pricing, ordering and contract pages for complete details. For more detailed technical information on these bundles see the "Tech Corner" under Internal Information.

Bundle can be used to transfer data, access the Internet and manage voice calls over IP on one connection. Businesses no longer need a voice line and data line to run their offices' operations. AV&DB is flexible because it offers a variety of configuration options so customers receive the right solution regardless of their existing equipment or need for new equipment —CPE can be rented or purchased.

Economy—Eliminates the need for customers to pay for voice and Internet services separately, so customers benefit from cost savings when they consolidate their voice and data services onto a single platform.

Efficiency—Allows customers to focus on their core competencies and reallocate existing resources to other functions. AV&DB enables customers to focus on their business, not technology, with a single communications solution.

Compatibility—Alleviates the challenges of managing and maintaining disparate networks across multiple locations with dependable local, long distance, and Internet service.

Tags: ADVANCED VOICE AND DATA BUNDLE, IP VOICE, NETWORKING

CenturyLink Intranet
Legacy CTL Work Tools
Legacy Q Work Tools

Corporate Directory
Search

BMG PROVIDE FEEDBACK

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Pictured: Promotions pages consolidate information that the analysts and sales people need to tell potential customers.

When speaking to prospective customers, sales people want to be as prepared and organized as possible. Although they can refer to the promotions pages and summary list, the intranet helps them make their meetings flow even better. They can choose the types of promotions they want to include, the region availability, and

product categories. The intranet then compiles the selected promotions in one PDF document. This assemblage includes all pertinent information about the promotion, including regional availability, terms, and fine print. The salespeople can thus refer to it with ease and composure.

CenturyLink[™] Business

« Back to Home Page

Products | Selling | Support | Why CenturyLink? | Programs & Events | Incentives | News | **Blog**

Search this site

Tags | My Account | Logout

Promotions

Current
Archived

Create a Custom Promotions PDF

You can create a custom, printable PDF of Current Promotions by using the form below.

First select the promo types, region availability and product categories you're interested in. A list of promotions that match your selections will appear on the right. When you're satisfied with the list, click the "Generate PDF" button.

Promo Types

☒ Acquisition ☒ Retention ☐ Sales

Region Availability

☒ IR ☐ OOR

Product Categories

☒ Bundles
☐ Business Continuity
☐ CPE
☐ Contracts
☐ Ethernet

☐ Hosting
☒ IP Voice
☒ Networking
☐ Private Line
☒ Security

Promotions Found for Criteria

- 16-Line 2xDS1 IA Promotion
- 2011 Fast Start Promotions—SIP Trunk Sessions, Hosting, E-Line, Delta Port, QWave (QCC and QC)
- Advanced Voice and Data Bundle
- Choice Unlimited Long Distance One Month Free Promotion
- Fiber to the Customer Premises Edge Module

Ready? Click the button below to generate your custom PDF.

GENERATE PDF

Note: If nothing is checked, all current promotions will be included in the PDF. Making selections limits the promotions included to only those that meet the criteria selected.

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Pictured: It's easy to customize a PDF document to include a particular set of promotions and all of their pertinent information.

Tags, which are important to site search and categorizing content, are displayed in the center of most pages. RSS feeds are another feature that hinges on tags, and on knowing which tags are associated with the particular page. Users can view a page and associated tags, and then decide whether they want to follow the topic; if so, they simply click the orange icon that appears in the page banner's lower right corner. Blog pages are among those that are tagged.

Pictured: A blog page has the author's name and photo, links to related



Search this site

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ProductsSellingSupportWhy CenturyLink?Programs & EventsIncentivesNewsBlog

Tags | My Account | Logout



BUSINESS BLOG »

Internal sales insights and emerging technologies.

BMG Customer Care

Posted on July 14, 2011 by [Debra Quinby](#)



Wow! It's been three months since the merger closed and I'm just getting around to my first blog. We at BMG Customer Care are offering our insight and strategy with the joint objective of ensuring an excellent and consistent customer experience through seamless integration of both office activities. The better we do our jobs, the better it will be for those looking to use customers and retain them so we can continue to deliver them.

The BMG Customer Care organization is led by an outstanding team of directors:

- BMG Customer Care Centers: Mike Krasner (Seattle), Terry Substantiel (Minneapolis), Julie Kaufman (Phoenix), Patricia Snyder (Indianapolis), Doreen (Dallas)
- Credit Collections: Bertrigtona, Complex Billing/Specialized Billing: Julie Kaufman (Phoenix)
- Complex Project Management (pre and post-merge): Dawn (Minneapolis)
- CPE and DAP Operations: David (Minneapolis)
- BMG Process and Systems: Emily (San Francisco)

Effective July 1, the Seattle Sales Office (SOS) and Seattle are aligned with their Sales regions and respective CPEs. We brought long and hard work about this move. It was hard for mutual support between Sales teams, and I am confident that Seattle and Jy will continue to grow the business.

Please be on the lookout for recurring blog updates from directors focused on a specific Topic of the Week. The intention for the first update is Director David's commitment to look forward to reading your blog comments as you participate in the various discussions and collaborate with this provider.

I continue to be impressed by what you folks are capable of. Be safe, and take care of our Customers.

Debra

TAGS: BLOG, CUSTOMER CARE

Related Content

**BMG Customer Care Org Chart**

Details for the Customer Care team, including names, photos and contact information.

Questions & Comments



Robert Christopher
SR MARKETING
MGR
Seattle, WA

Posted about 1 month ago · [flag this comment](#)

Awesome. Great way to communicate with your organization. Hope people aren't shy about posting comments and questions!

Post a comment or ask a question

☐ I understand that all online postings are governed by [The CenturyLink Code of Conduct](#) and compliance (see [policy 108](#)). Misuse or inappropriate comments will be flagged, reported and subject to discipline up to and including termination.

SUBMIT COMMENT

CenturyLink Intranet
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FEEDBACK

Recent BMGQ Blogs

[CPE: A Continuous Improvement Journey](#)
08/26/2011 >

[July Customer Care Recognition](#)
08/24/2011 >

[BMG Customer Care](#)
07/14/2011 >

[SIP Trunk General Q&A](#)
06/02/2011 >

[SIP Trunk Pricing Q&A](#)
06/02/2011 >

**ThinkGig**
An industry insights and technology blog.

[Considering Going to the Dark Side? The Hidden Costs of Dark Fiber](#)
08/24/2011 >

[Beyond Viruses and Bots: Real Risks You Might Be Missing](#)
08/09/2011 >

[CenturyLink Acquires Savvis](#)
07/15/2011 >

**twitter**

[@CenturyLinkBlz](#)

Thanks for the RT @interop.
about 4 days ago

Ready for #Interop New York?
We are! See our special offer to get 25% off registration or a free Expo pass: <http://t.co/XiedSwR>
about 4 days ago

Become an Ultimate Problem Solver before the long weekend: <http://t.co/sMTBP2>
about 4 days ago

content, and allows for comments at the end. Tags appear in the center of the page, and the orange icon to create an RSS Feed appears in the upper right under the banner.

Understanding users' tasks and experience levels is compulsory in good intranet design. The sales people at CenturyLink are quite technical in their domain, but that doesn't necessarily mean they know about RSS feeds or how to use them. A feature like this can go unnoticed forever or not be used to its potential. But if used well, it can keep people helpfully informed. Intranet team members did a great job describing simply and clearly what these are, how they work, and how to create them. They also provide a list of inline links of recommended RSS Feeds.

CenturyLink Business

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Tags | My Account | Logout

My Account

[Intranet Posting Guidelines](#) [RSS Help](#)

My Bio
I manage Customer Retention Marketing and Customer Field Marketing for Mid Markets, in the Business Markets Group.

[Linked-In Profile](#)
[Mid Markets Retention](#)
[SMB IT Connection Discussion Group](#)

Feeds and RSS: What are they and how do they work?
Throughout the BMGQ, you'll notice many pages display an orange icon like the one above. When you click on it, you'll be taken to a URL that is based on the tags on the page that you clicked on. You can add the URL to an [RSS Reader](#) program and be updated anytime there's something new on the BMGQ that matches those tags.

Recommended RSS Feeds

Any News Story	Any Blog Update	New Collateral Updates
Product News	Processes and Systems News	Industry News
Training News	Marketing and Sales News	Customer Notifications
Anything About Cloud	Promotions Updates	Merger Updates

Custom RSS Feeds
You can create custom RSS feeds that are specifically targeted to your job and your interests. To make a custom feed, first go to the [Tags](#) page, and search for tags (topics) that interest you. After you search, just click the orange RSS icon to get the custom feed URL. Any time there's an update that matches all of the tags in your feed, you'll get an alert in your RSS reader. You can join up to three tags in one single feed, and subscribe to as many feeds as you want!

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Pictured: On the *My Account* page, the intranet presents a very good description of what RSS feeds are and how to set them up, along with a list of recommended feeds.

Having gone from havoc to helpful, the CenturyLink Business Markets intranet does everything but take the client golfing. It lends a credible and consistent hand to the Business Markets Sales professionals and support personnel.

BACKGROUND

Even a robust intranet can become stagnant if employees simply can't locate what they need. This was the situation the Qwest/CenturyLink team encountered with the company's Business Markets intranet. The site is accessed via the main corporate intranet, but is largely self-contained, so it was easy to see that a lot of useful information was going unused by the site's main audience, sales people.

"We noticed that a large amount of useful information was going unused by sales because it was buried deep in the website," says Jeff Hansen, Marketing Manager III, Qwest/CenturyLink. "We wanted to bring this material to the front to make it more visible as well as increase visits to the site and make the site more useful overall."

Users were unable to find critical information easily and quickly; on average, it took about seven clicks to find a document. "They were not aware of what promotions were available for each product," says Emily Puffett, Digital Marketing Group Manager CenturyLink Business, "Documents were not well organized for a given product area, contact information for product managers was not readily available, and content was outdated."

The redesign project was aimed at finding solutions to solve these issues.

They started by analyzing the existing site metrics they were tracking in Omniture to determine some of their needs. Then sought the expertise of outside agencies to assist with the usability activities, choosing EffectiveUI to augment the in-house team's skills.

According to Hansen, the team's mandate was clear: streamline information and collateral for the sales team, allowing them to leverage content they didn't know was there, and reduce the time spent searching the site for materials that support their sales efforts.

"Using a Tiger Team consisting of CenturyLink and EffectiveUI, we came up with a design rationale based on the final user experience," says Hansen. "We then prioritized the features we would like to include and came up with a design methodology based on prior research on web usability and the findings of the group."

The EffectiveUI team created wireframes, and then tested the new design extensively with a variety of end users—from new hires to experienced sales professionals. Based on this feedback, the design agencies streamlined the navigation and UI to make essential sales material more accessible and easy to find on the site. Peak Systems was then engaged to do what was arguably the project's most difficult task: make the new design a reality.

The homepage now features pertinent industry-related news and highlights numerous cross-sell/upsell opportunities. It also features frequently used tools and emphasizes the company's social networking activities, including its ThinkGig blog and Twitter feed.

This effort, completed in 2010, took approximately 10 months to complete and the project went smoothly. "The project was managed well," says Hansen. "There were no budget overruns and once we got a timeline nailed down we managed to stick to it. The redesign was launched on time."



Submit a News Story

If you would like to have a news item added to the BMGQ News section and shared with Business Markets employees, please submit it here. Please provide the complete content (not simply a suggested topic). Please make sure to highlight key dates, action items, and how your topic impacts or benefits the business and/or customers.

The Comm Team will receive notification when your request is submitted. They will review the request and publish if approved. Questions can be sent to communications.feedback@qwest.com.

News Category

Title

News Item Summary

A brief, high-level description of news item to display with RSS feeds and on the news summary page. Should be succinct and compelling. Maximum length of summary is 180 characters. You have 180 remaining.

Full Text of Article

[news help](#)

For best results, type up your story in Word and check spelling and grammar. Then copy/paste into the box above. If you need to add custom formatting, tables or imagery, please attach a Word document below with that information.

Tags (optional)

Enter a list of topics the article is about, separated by commas.

Examples: long distance, merger, voice products, data, customer support

Attach a File or Link (optional)

Name

Description

Upload a file... no file selected

OR enter a URL

☐ Check here to confirm that this file/link has any, all legal approvals required for publication.
[Click here](#) to visit the brand center.

Additional Notes/Instructions for the Comm Team

Please include any additional details or information needed to communicate your message such as: 1) desired publish date, 2) manager's name for approval, 3) target audience, 4) additional contacts or mailboxes to be listed on the page, and 5) an alternate author to be listed on the page. *Note:* Unless otherwise indicated here, you will be listed as the author of the page and will be responsible for responding to user comments.

To make requests for other, supporting communications such as emails or webinars, see our [other communication options](#) for more information.

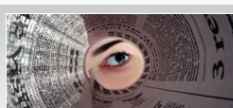
Pictured: The news story form lets users submit news stories to the site.

TOP NEWS



July 2011 Stacked Rankings

Posted August 24, 2011 in Stacked Rankings
The latest Business Markets sales stacked rankings are now posted. Includes year-to-date MRC attainment results thru July for Sales VPs, Directors, Managers & sales ...



The Impact of Industry Analyst On Sales

Posted August 31, 2011 in Training
Sales training: Join this call to understand how industry analysts impact your sales on a daily basis and how you can use that information to close sales.



The Market Evolution Team Wants YOU!

Posted August 31, 2011 in Product
The Market Evolution Team is actively soliciting your input on ideas for product portfolio development, product and service gaps, market coverage & competitive opportunities.



Product Footprint Expansion Alert

Posted August 19, 2011 in Product
IQ Networking with Ethernet Local Access (ELA Native) Market Expansion Continues! 40 new backhaul markets added to pricing tool!



New! Best Practices Online Community

Posted August 9, 2011 in Marketing and Sales
The Best Practices Online Community is a cross-organizational, fully accessible online portal to share and store examples of tried and tested best practices for sales and support.



EZ Pricing Expansion Initiative

Posted August 13, 2011 in Other
EZ Pricing is broadening its scope to include QC MOE, QC WAVE, PRS-DSS and some ICB Local Access pricing for Ethernet and Optical Speeds. The goal is to reduce POM cycle times.

More News

Web Calendar

Submit a News Story

Product

The Market Evolution Team Wants YOU!
08/31/2011
Product Footprint Expansion Alert 08/19/2011
VPLS Private Port and End to End Performance Reports 07/28/2011
ISDN PRI with IP-PBX Bundle - Now Available in All In-Region States 07/28/2011
Switched LD Self PIC Alert 07/20/2011

See all Product »

Industry News

Verizon Strike Update - Provisioning
08/31/2011
Competitive Updates - Q211 08/30/2011
UPDATE: Verizon Strike Information 08/08/2011
2011 Nemertes Plothouse Awards - Mixed Results 08/03/2011
Ordering Alert: Verizon DS3 Intervals 07/18/2011

See all Industry News »

Customer Notifications

Important New Local Line Fee and Pricing Increases 07/06/2011
Privacy Policy Consolidation 06/21/2011
Final Post Merger Customer Notifications 05/11/2011
Ohio Customer LD Notification 04/12/2011
QWAVE Private Line Customer Notice 12/14/2010

See all Customer Notifications »

Processes and Systems

New Customer Care Blog Entry - CPE
08/31/2011
Salesforce News: Product Catalog & Data Updates 08/19/2011
Intelligent Order Form Now Allows Edits To Comments 07/18/2011
New CPE Returns Tool Rolls Out 07/12/2011
BMG Adjustment Policy 07/11/2011

See all Processes and Systems »

New Collateral

Extended Promotions - August 2011
08/10/2011
New! Protect & Defend Solution 08/10/2011
Update! Fiber to the Customer Promotion For IQ Networking Internet and Private Port Ethernet 08/10/2011
Why CenturyLink Presentation Refreshed and Rebranded 08/09/2011
Breadth of Service Assets Refreshed and Rebranded 08/09/2011

See all New Collateral »

Other

INCENTIVE NEWS: New Award Site Launches
08/23/2011
Important Crisis Management Reminders 08/22/2011
2011 Sales Comp Satisfaction Survey Launched! 08/16/2011
EZ Pricing Expansion Initiative 08/13/2011
Business Markets All Hands Call 8/12 08/03/2011

See all Other »

Search News

Looking for a specific piece of news in the archive? Use the box below to search by phrase or keyword to find exactly what you're looking for.

Enter search terms....



Search

Pictured: The main news page, where the user-submitted stories appear.

INTRANET TEAM



Pictured (left to right): Bruce Black, Brad Umbaugh, Jeff Hansen, Brenda Van Der Steen, Emily Puffett, Timberlyn Wilson, Rhia Bucklin, Rick Wangen, Shelley Washburn, and Michael Salamon. Not pictured: Bob Christopher, Beth Cossette, Jeff Lewis, Erika Oliver, Brad Umbaugh, and Jill Petersen.

GOVERNANCE

The Business Markets Marketing Group owns the Business Markets intranet, while designated content managers are responsible for specific content areas within the site. This arrangement has benefitted the intranet by streamlining the content process. "Owning the intranet allows our team to be able to make relevant materials available to sales quicker than if we would have to go through another department," says Hansen.

Other team responsibilities include the following:

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Core Team	• Maintain and administer hardware/software • Create the strategic direction for the intranet as a whole • Monitor and report on-site metrics • Maintain existing content and add new content as needed
Content Owners	• Provide content for web pages and in some cases acts as administrator for specific sections
Development Team	• Provide ongoing support for the site platform • Implement new features • Work with teams within the organization to plan, design, and implement new site sections, implement new functionality, and make design updates based on changing user goals and feedback

USERS

Employees in the company's Business Markets Sales Group are the primary site users. These nearly 2,000 nationwide Business Markets sales professionals and process analysts use the intranet to learn about new products, research the competition, and gather materials needed to help make and retain sales. There is also a small subset of process analysts and support staff that use the site to house their own information; they provide access to these materials to the sales team as needed.

Because the Business Markets Group owns the intranet, their team can make relevant materials available to sales people quicker than if they had to go through another department such as IT.

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	• http://bmi.corp.intranet/ (http://gbmq.qwest.net/ prior to the merger)
Default Status	• The intranet is linked from the main corporate intranet site, and users can bookmark it if they wish. (The ability to change the homepage has been locked out post-merger.)
Remote Access	• The site is located behind the corporate firewall. Remote access is possible on corporate-imaged computers using virtual network software with a Secure ID token.

DESIGN PROCESS AND USABILITY WORK

Design Approach

To begin the design process, team members first figured out users' existing pain points and developed an effective approach for addressing them.

"We started by working to identify the pressing pain points of using the site with the internal customer support team," says Michael Salamon, Lead Experience Architect, EffectiveUI. "They [CenturyLink] identified the top challenges, and then we [EffectiveUI] did interviews with current site users to define what the typical sales person needed to do. This feedback was then translated into features that we then prioritized."

The team held a formal kickoff session to generate input from primary user groups, such as sales professionals, sales operations, and marketing. This step was critical. "It helped us establish the pain points and understand first-hand what problems we needed to solve," says Puffett.

The teams then created a design rationale, which drove the creation of wireframes that were reviewed and analyzed over a period of months by project stakeholders, the development team, and user advocates. From there, the new site architecture and design was built and extensively tested with a variety of end users—from new hires to experienced sales professionals.

"Based on user feedback, the navigation and user interface were refined to make the materials the reps needed to do their job more accessible and easy to find on the site," she says.

Once Peak Systems implemented the final development, it migrated site content into the new environment, and new pages were created to support the needs of the user base.

Working with Outside Agencies

The internal intranet team partnered with usability firm EffectiveUI to do all of the front-end user-experience work, including customer research, design, and usability testing. Peak Systems performed all development work, maintenance, and ongoing support, and designed and implemented new features.

In both cases, the internal team and the outside agencies worked together as if one team. “We worked closely with both EffectiveUI and Peak,” says Puffett. “We met regularly and stayed tightly integrated in order to make this a successful redesign.” Peak and Effective UI were a part of each discussion from the very beginning in terms of goal setting and user-experience discussions. “This,” she says, “was a critical component of our success.”

Both agencies were involved in the project planning, division of labor and timeline development.

“We chose EffectiveUI because we liked their user-focused approach to web design.” says Hansen. “Peak Systems already worked on the company’s systems administration, so they were a natural choice for the development work.”



Pictured: An early working version of a proposed homepage.

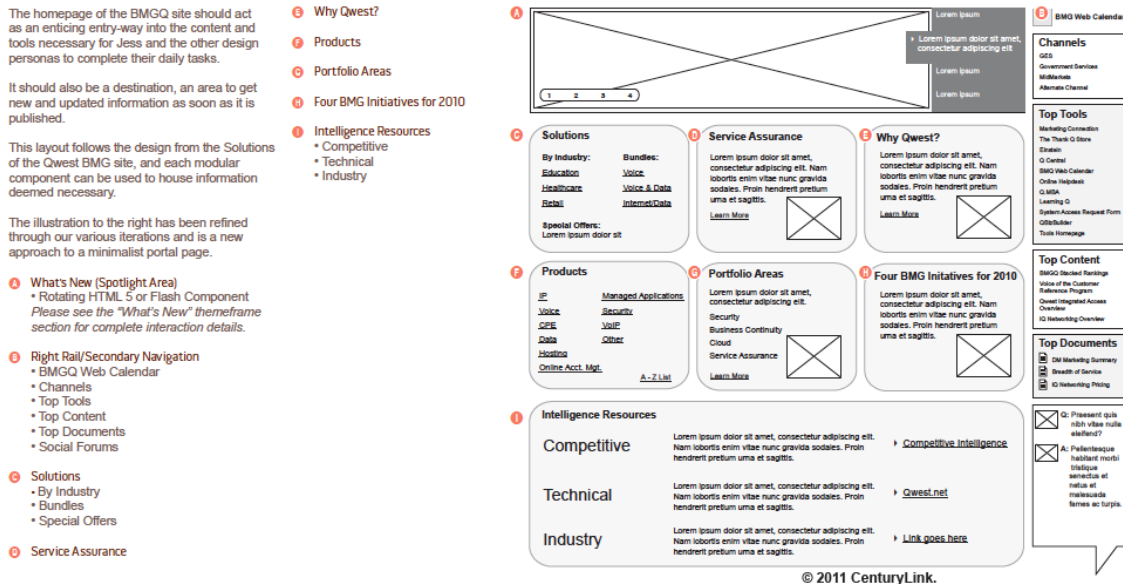
Homepage

The homepage of the BMGQ site should act as an enticing entry-way into the content and tools necessary for Jess and the other design personas to complete their daily tasks.

It should also be a destination, an area to get new and updated information as soon as it is published.

This layout follows the design from the Solutions of the Qwest BMGQ site, and each modular component can be used to house information deemed necessary.

The illustration to the right has been refined through our various iterations and is a new approach to a minimalist portal page.

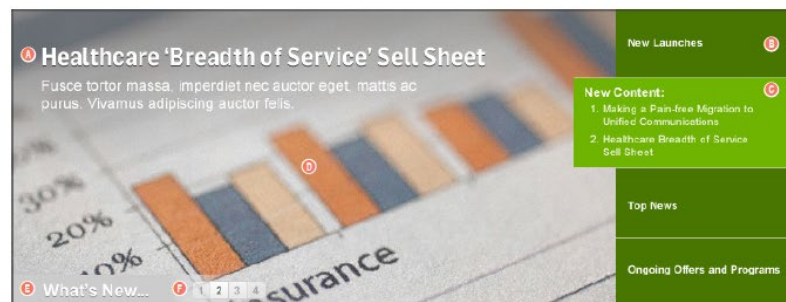


Pictured: The design rationale behind the homepage design.

What's New Homepage Section

This component has been designed to be an embedded flash movie with rich interaction as described below.

- 1** Messaging for Active Spotlight/Slideshow
- This content supports the current "active" section of the slide show.
 - The image in the background should support the message and the active item (in this example: New Content - Healthcare Breadth of Service Sell Sheet).
 - Clicking on this text or the image in the background should resolve to the appropriate destination (in this example the Healthcare Sell Sheet).
- 2** Non-Active Spotlight/Slideshow element
- This element should be replaced with the most current new item.
 - When the user rolls over the element, it increases in size (tween animation) and displays additional content.
 - Focus on this element also initiates the Hero Image transition.
- 3** Active Spotlight/Slideshow element
- This element is currently active.
 - When clicked the page resolves to the appropriate destination.
- 4** Hero Image
- This image relates to the active Spotlight/Slideshow element.
 - Animated transitions between images occur when the user interacts with the other elements.
 - Transitions can be randomized and may include fade-in/out, pixel blurs, wipes, etc.



1 What's New Label

- 1** 1 - 4 Spotlight Controls
- Duplicates behavior of the Non-Active Spotlight/Slideshow elements.
 - Bold item relates to the current active spotlight/slideshow.
 - When a number is clicked the component transitions to the appropriate spotlight/slideshow element.

NOTE: This element needs to transition between each automatically upon page load. We're suggesting a 3 - 4 second pause between transitions, but that may need to be reduced depending on the volume of text.

© 2011 CenturyLink.

Pictured: The rationale behind designing the *What's New* section.

TIMELINE

The initial redesign project took approximately 10 months to complete, from January through October 2010. Some of the intranet's milestones are outlined as follows:

PROJECT TIMELINE	
Milestone Date	Milestone Description
1996	Qwest begins
2000	- Qwest acquires USWest - Websites and intranets are merged
2000 - 2006	Various iterations of the Business Markets Intranet are created; site was mainly static HTML
2007	v.1 of the new Business Markets Intranet is built on the Ruby on Rails platform, which made it more adaptable to business needs; let the company put all content into databased templates for better consistency across the site; let non-programmers edit content; and made Admin access possible based on business need
October 2010	v.2 of the Business Markets Intranet is released with a much-improved homepage and content pages; new templates for promotions and product detail pages. This version of the site was designed after identifying the content most often accessed by users. Redundant sections were eliminated.
February 2011	- Tagging, page commenting, and RSS feeds added - News section is redesigned, social media integration added
August 2011	- CenturyLink merger completed - Site rebranded according to CenturyLink brand guidelines (color and style)

CONTENT AND CONTENT CONTRIBUTORS

A CMS in Transition

CMS systems are often a pivot point for other business systems involved in the intranet ecosystem, so they are often in flux as companies transition from one set of systems to another. Such is the case at CenturyLink.

"Our CMS is evolving," says Brenda Van Der Steen, Group Manager, Content Strategy. "The original CMS for the intranet was created from scratch to our

requirements using the Ruby on Rails platform. Since the company recently went to Salesforce.com, leveraging the content functionality and APIs offered by that platform is important. The intranet as well as other internal and external portals will link to materials in [Salesforce.com] from the intranet site.

Many people and groups from product management, executive teams, the support organization, and marketing are involved in content development. In all, approximately 50 people can add content to the site and help keep the content both fresh and relevant.

"If something isn't being used, we encourage the owner to archive it," says Hansen, adding that they run periodic audits and reviews "to keep content clean and fresh."

Workflow

Oversight is determined based on the type of content. Different groups provide different types of site content. For web pages, the content owner provides content. For collateral—both internal and external-facing—there is a Content Strategy team responsible for creating, reviewing, ensuring proper legal review, and putting it into the correctly branded templates before posting to the site.

The team uses a custom workflow management tool, the IUT (Internet Update Tool), which lets stakeholders request content updates. The tool keeps all relevant parties involved in the process. The form process not only ensures that all necessary parties are involved with proper notifications and sign-off, but that all content adheres to site standards and templates.

On the site, the CMS lets people work on pages in a staging environment where changes can be made behind the scenes to get them ready for general site use. Once the changes are finalized, the pages are published and the content is available on the live site.

"We also allow regular users to submit some types of content, particularly news and best practices, directly to the site," says Puffett. These submissions are reviewed by site administrators, edited as needed, and then published to the website just like any other page.

Training Authors and Maintaining Standards

Templates provide a built-in policing mechanism so that content creators adhere to an existing set of page styles. At CenturyLink, the site's admin automatically puts content into the right page template based on where the content will appear on the site. The team provides guidelines to site editors on how and where to add different types of content, along with recommendations for formatting, page tagging, and writing style.

"Since most content comes through one channel—our workflow tool—we can ensure that anything that makes its way through that process has been properly checked prior to publication," says Hansen. "Site administrators have been trained in our site standards."

Training is provided on an "as needed" basis. When the site was rolled out, the team held two formal training sessions for content authors. This included a walkthrough, a demonstration, a Q&A, and training documents. "How to" presentations are also available for new content authors.

Making sure content is kept fresh and old content is retired in a timely manner is a perpetual challenge for intranet teams. The CenturyLink team keeps a regular scorecard for the site that illustrates what is and isn't being used.

TECHNOLOGY

The core of the application is a custom CMS developed in Ruby using the open source Ruby on Rails web application framework. "The flexibility of Ruby and Rails has allowed us to meet all of the specific needs of the client, both for initial development and over time as the application has grown," says Jeff Lewis, senior developer.

Hansen concurs: "The biggest advantage that came with this decision is that we can pretty much make it do whatever we want it to do. The biggest challenge is that we increase our dependence on Peak Systems, who created it, and don't get regular upgrades the way an out-of-the box solution such as SharePoint would."

The rest of the site's technology breaks down as follows:

TECHNOLOGY	
Category	Technology
Web Server Hardware and O/S	Ruby programming language, Ruby on Rails web application framework, Apache web server, MySQL database, and CentOS Linux operating system
Bug Tracking/Quality Assurance	Users can comment on any site asset or page; their feedback goes into a central database that is regularly monitored
Design Tools	Page content is edited using the built-in TinyMCE WYSIWYG editor, which provides text formatting and layout of page content; lets writers view and edit the underlying HTML for more advanced or custom layouts. Styles and templates are limited and strictly enforced to maintain consistency.
Content Management	The custom CMS contains all of the site's locally stored pages, links, and files, and divides data into two main sections: staged and published. All general CMS users view only the published data. CMS writers make changes to data in real time under the staging section; once finalized, CMS publishers publish that data, again in real time. All modifications are recorded in the database and can be reviewed through the application for historical purposes.
Search	Google Search Mini Appliance (Google Mini)

Other Functions	• Feeds/RSS (Atom), tagging, social media integration, and the ability to submit news stories via an interactive form, which also provides the ability to rate content and pages, and provide feedback on any page or asset. • Jquery is used to improve the UI , including controls to update displayed content without navigating to a new page, buttons to scroll to the top of long pages, and dropdown navigation to reveal additional layers of navigable pages without requiring extra clicks. • Custom Promotions PDF tool was built as an add-on to the CMS, where content that is stored in the database can be reused to generate a printable PDF (the PDF is generated on the server back end using the Prince XML tool). • Corporate LDAP is used for login to get the user's name, contact information, and management hierarchy, and to track user clicks throughout the site. • Single sign-on lets users click to other sites and tools without having to sign in again. The site passes user's LDAP credentials to authenticate. • SalesForce integration lets users access customer materials that are housed on SalesForce directly from the intranet. • Google Analytics and Omniture are used to track user clicks and page usage.
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SEARCH

Like many organizations, CenturyLink trusts Google with its intranet search needs, choosing the Google Search Appliance (Google Mini). As Hansen noted, "People are familiar with Google and like the interface."

"Choosing Google as the organic search was the obvious choice. All site content, within both pages and documents, is always up-to-date in the search results," says designer Rhia Bucklin. "We don't have to tinker with it, we just know that it works."

This choice has made a difference in how much tweaking the results need over time.

"We make sure keywords and collections are up-to-date," he says, "but for the most part, the Google Mini appliance uses proprietary algorithms to create results so we aren't able to do a lot of tweaking in that respect."

The Google Mini also lets CenturyLink set up separate, unique search collections that index specific site areas, such as the *News* section. "We found that users think about news content differently than they do the rest of the site," says Bucklin. "They needed to be able to search specifically within news to find time-based content like announcements, training info, and customer alerts." The team worked with Bob Christopher, Senior Marketing Manager of *News*, to create a customized search, which is available at the bottom of the *News* homepage and on the right rail of news article pages.



Search Results

Search

Results 1 - 10 of about 1010 for **long distance**. Search took 0.05 seconds.

[Business Markets Intranet : Long Distance](#)

CenturyLink **Long-Distance** services provide high-quality connections over the CenturyLink multi-protocol label switching (MPLS) OC-192 fiber optic SONET network ...
[bmi.corp.intranet/bmgq/products/long-distance - 40k - Cached](#)

[Business Markets Intranet : International Long Distance](#)

International **Long Distance** provides high quality international **long-distance** service over the CenturyLink International Voice Network with competitive, market ...
[bmi.corp.intranet/bmgq/products/international-long-distance - 26k - Cached](#)
[\[More results from bmi.corp.intranet/bmgq/products \]](#)

[Business Markets Intranet : Kansas Long Distance Refund](#)

On the November 2010 bills, **Long Distance** customers headquartered in the state of Kansas will be getting a credit of \$.60. ... Kansas **Long Distance** Refund. ...
[bmi.corp.intranet/bmgq/news/product/kansas-long-distance-refund - 28k - Cached](#)

[Business Markets Intranet : Ohio State Long Distance Detariff](#)

... Ohio State **Long Distance** Detariff. ... As communicated previously, beginning on April 11, 2011, all invoices in Ohio will have a **Long Distance** detariff notice. ...
[bmi.corp.intranet/bmgq/news/product/ohio-state-long-distance-detariff - 29k - Cached](#)
[\[More results from bmi.corp.intranet/bmgq/news/product \]](#)

[Business Markets Intranet : Long Distance Self Service Promotion](#)

NEW interstate **long-distance** discretion management (DM) level A, B and C price points. ... **Long Distance** Self Service Promotion. Type(s), Acquisition. ...
[bmi.corp.intranet/bmgq/promotions/long-distance-self-service-promotion - 24k - Cached](#)

[Business Markets Intranet : Choice Unlimited Long Distance One ...](#)

Customers new to QCB Prime and CenturyLink Unlimited **Long Distance** can save. Voice One month free of Unlimited **Long Distance** for term QCB Prime customers! ...
[bmi.corp.intranet/bmgq/promotions/choice-unlimited-long-distance-one-month-free-promotion - 24k - Cached](#)
[\[More results from bmi.corp.intranet/bmgq/promotions \]](#)

[Business Markets Intranet : Grandparented Choice Long Distance](#)

... Contacts; FAQs. Grandparented Choice **Long Distance**. CenturyLink Choice™: Grandparented Choice **Long Distance**. Grandparented as of 4/10/05. ...
[bmi.corp.intranet/.../internal-information/grandparented-choice-long-distance - 24k - Cached](#)

[Business Markets Intranet : Find Pages by Tags](#)

... Search Tags. Enter one, two or three tags to find what you're looking for. Search Results. Subscribe to Similar. **long distance**. 9 pages found: ...
[bmi.corp.intranet/bmgq/tags/long-distance - 30k - Cached](#)

[Business Markets Intranet : 3Q 2011 Long Distance Incentive ...](#)

... 3Q 2011 **Long Distance** Incentive (Archived). July 11, 2011 – September 30, 2011. ... The purpose of this incentive program is to increase new **Long Distance** Sales. ...
[bmi.corp.intranet/bmgq/incentives/3q-2011-long-distance-incentive - 27k - Cached](#)

[Business Markets Intranet : 4Q 2011 Long Distance Incentive](#)

... 4Q 2011 **Long Distance** Incentive. October 1, 2011 – December 31, 2011. OBJECTIVE: The purpose of this incentive program is to increase new **Long Distance** Sales. ...
[bmi.corp.intranet/bmgq/incentives/4q-2011-long-distance-incentive - 28k - Cached](#)
[\[More results from bmi.corp.intranet/bmgq/incentives \]](#)



Result Page [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [Next](#)

 long distance

[Search Within Results](#)
[Advanced Search](#)

Powered by Google Search Appliance

CenturyLink Intranet
Legacy CTL Work Tools
Legacy Q Work Tools

Corporate Directory

 Search


© 2011 CenturyLink. Site Map. To submit comments or suggestions, or to find out about our policies, please contact us or review site help.

Pictured: An example search results screen.

RESULTS AND ROI

Measuring ROI on an intranet is always tricky business, but CenturyLink has taken a practical approach based on its stated goal of quickly getting users to the information they need so they can get out and get on with their jobs. And, so far, indicators show the changes are working.

Monthly visits per visitor has increased more than 2 percent since implementation. Also, the average time on site per visit has increased by 10 percent to 12 minutes (30 seconds per visit), while page views have dropped slightly.

"These two metrics, which usually trend together, tell us that users aren't spending less time on the site—they're finding what they want with fewer clicks," says Hansen.

Asset downloads per visitor has also increased 9 percent, even while the historically most-downloaded files (sales rankings) haven't been posted the past few months.

So, site metrics are backing up the team's opinion that the site is more usable and effective than the previous design. This measure also includes positive accolades from the users.

"We also have received positive feedback from the end users that confirms this," says Hansen. "Statistics show that users can find what they need quicker than before and there are many new ways to share relevant information that weren't possible using the old site design."

LESSONS LEARNED

CenturyLink team members share a few lessons learned from the redesign effort:

- **Always have a Plan B.** "Nothing will ever go exactly as you planned. Be flexible and always have a Plan B ready. Frequent meetings are often needed during the early stages of the redesign to make sure things stay on track." (Hansen)
- **Usability up front saves time on the back end.** "Having an experienced usability agency really helped get things on track. By the time actual development was ready to start, we'd already ironed out most issues and had done extensive testing with the designs to know the one we chose was the best for our needs." (Hansen)
- **Don't assume you know best.** "Always, always listen to your users, never think you know what is best, bounce every idea and change past your user community to ensure it makes sense and receives validation. For example, the links to frequently used tools/resources were used much more than we thought. When we took away some tools to get real estate for other items, we got immediate feedback from our users to add them back." (Puffett)

LivePerson, Inc. (2012)

Using the intranet:

LivePerson enables the world's top brands to create meaningful connections with their customers through a platform of intelligent engagement solutions. With the LivePerson platform, businesses can connect with their customers in real-time, at the right time, through the right channel, increasing sales conversions and delivering a better customer experience. Over 8,500 organizations worldwide rely on LivePerson to engage intelligently with consumers on their website, in social media, mobile, and through any other device they connect. LivePerson was named one of America's 25 Fastest-growing tech companies by Forbes in 2011.

Headquarters:

New York, New York

Number of employees the intranet supports:

550

Company locations:

New York, San Francisco, Atlanta, London, Tel Aviv, Melbourne

Locations where people use the intranet:

Throughout North America, England, France, Spain, Germany, Israel, and Australia.

Annual sales:

\$135 million

Design team:

An in-house team of six was dedicated to the complete intranet redesign project

Members:

Michael Cheng, Senior Art Director; Clare Warbuton, Senior Web Developer; Rich Adler, Video Producer; Giancarlo Trentini, Web Developer; Augusto Garcia, Head of Creative; and Lynda Mota, Creative Operations

SUMMARY

In the worst intranet redesign cases, designers have no power, upper management cares little about the intranet, and the organization's unrefined goals and principles serve as a flimsy foundation for the project. As a consultancy, we see such wearisome conditions often, which is why it is such a pleasure to discuss the scenario at LivePerson, Inc., where the absolute opposite circumstances existed. Designers leveraged a strong culture and well-defined corporate values—not to mention exceptional support from upper management—to create an unparalleled intranet community.

LivePerson's *Nation* intranet supports 500 users and counting; in 2011, LivePerson was named one of America's 25 Fastest-Growing Tech Companies by Forbes and Company of the Year by Frost and Sullivan. Keeping 500 people updated about corporate happenings is quite manageable when employees are all stationed in the same building or even the same city. But once people start spreading out across the globe, watch out. The community feeling and communication channels rapidly break down and become impersonal. So how can co-located offices at a growing organization maintain the kind of feeling usually seen only at start-ups and with truly energized teams? Do what LivePerson has done: Provide an amazing place online that fosters community and respect, and enables proper sharing of information both business and personal.

The axis of any organization is its values. LivePerson's values are easy to grasp with just a glance at the intranet's *Core Values* page. As the following text excerpts and links show, the *Core Values* page gives employees a buffet of social features that reflect the company's emphasis on contribution and community:

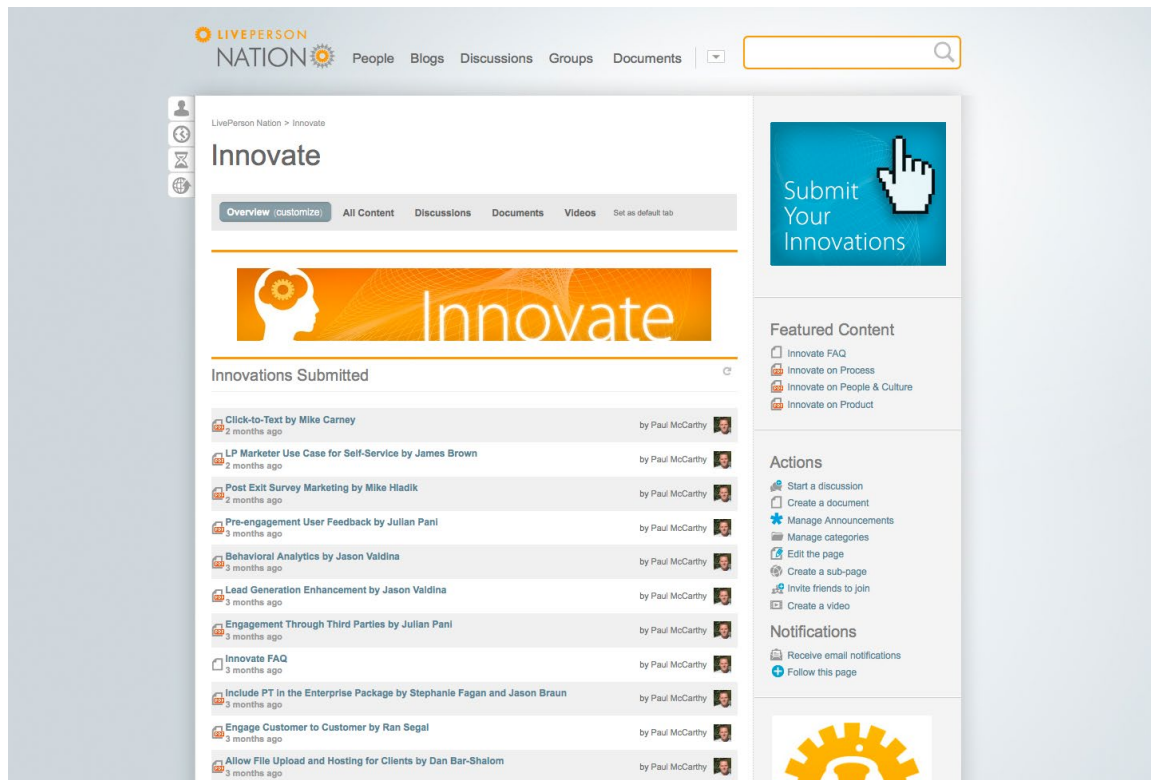
- *Share your stories... Connection and community is central to our culture and business strategy. Help bring our values to life...*
- *Post a video... We encourage you to share your personal story through video... Need help to create?*
- *Start a discussion*
- *Write a story post*
- *Invite friends to join*
- *Receive email notifications*
- *Follow this page*

The screenshot displays the 'LivePerson NATION' intranet page for 'Core Values'. The top navigation bar includes links for 'People', 'Blogs', 'Discussions', 'Groups', and 'Documents', along with a search bar. The main content area is titled 'Core Values' and features a large video player with the title 'Be an Owner Help Others'. The video shows Yaara Taasan, a Deployment Engineer, speaking. Below the video is a section for 'Recent Stories Posts' with two entries: 'GianCarlo- Living the core values' and 'Be an Owner: Recognizing Success on the Small Business Team'. The right sidebar contains sections for 'Share your Stories', 'Post a Video', 'Actions', and 'Notifications'.

Pictured: The *Core Values* page thoroughly encourages, explains, and assists in sharing knowledge and opinions.

At some organizations, upper management prefers that people keep their opinions and personal lives to themselves. But this is not the case at LivePerson. All employees, including the CEO, work in an open-seating arrangement to foster collaboration. This physical world translates to the intranet, where each person's input is as important and influential as the next. Knowing that a great idea can come from anyone—not just people in Research and Development—the organization welcomes innovative ideas to better LivePerson's business. The intranet supports this via the *Innovate* area, which offers an avenue for collecting and discussing suggestions. *Innovate* shows a list of submitted ideas, which users can filter by *All*

Content, Discussions, Documents, and Videos. Control features let users set a default tab and customize the page.



Pictured: Everyone is encouraged to submit and discuss business innovation ideas on the intranet.

When rebuilding the intranet, the design team's research showed that employees had a great desire to collaborate and innovate with each other in their work, and to share information about their personal lives as well. The intranet meets these desires throughout, and it all begins on the homepage. There, content is divided into two sections: the top part (orange headings) offers corporate content, with *Work Stream*, *Market News*, and *Nation Pulse* sections; the area below (green headings) has personal content, with *Life Stream*, *Poll the Nation*, and *Featured Content* sections. Small refresh icons appear to the right of the headlines in sections as applicable. Each item displays the title in blue text with a gray timestamp below, noting when it was posted and where so users know that content is up-to-date. The image to the right of each item shows the author's face, which can serve as an introduction to coworkers. At the bottom of the page is a link that anyone can use to suggest a story; if a story is selected it will become a featured story. Icons to the left of each item delineate the content type, such as a PDF file, a comment, or a PowerPoint deck. These icons show the diversity of content and give users a clue about the type of content behind the link. Blogs are also featured on the homepage on a rotating basis based on their timestamp.

[People](#)
[Blogs](#)
[Discussions](#)
[Groups](#)
[Documents](#)

Check Out the New Nation

Work Stream

- New wall mural in the support room of the Atlanta office
3 minutes ago in Atlanta Office
- Re: Parking Options
5 minutes ago in Grand Central Commuters (GCT)
- State of Mobile Commerce Apps, Forrester Research
47 minutes ago in Marketing
- Mobile Commerce Forecast 2011 to 2016, Forrester Research
49 minutes ago in Marketing
- ICON Health & Fitness Case Study
1 hour ago in Marketing

Market News

- State of Mobile Commerce Apps, Forrester Research
47 minutes ago in Marketing
- Mobile Commerce Forecast 2011 to 2016, Forrester Research
49 minutes ago in Marketing
- Best And Worst Of Website User Experience, 2011: US Banks, Forrester Research
1 day ago in Marketing
- Marketing To Millennials: The Next Generation Of Purchasing Power, Forrester Research
2 days ago in Marketing

Nation Pulse

- Whats New page for Summer 2011 Update
3 days ago in B2B Customer Support
- LP Voice & Multi Channel Overview (Value Prop, Experience, Call Flow, Features, etc)
3 days ago in Sales & Service
- Re: Do button images have to be a *.gif file?
1 week ago in ENT PM Group
- Re: What are the best practices for Agent names?
2 weeks ago in Product Updates and Discussions

Strike!!!!

NY team's night of shenanigans at Bowlmor lanes.

[Watch Video >>](#)

Life Stream

- Re: LOVE Thai Food? Come learn how to cook SOM simple Thai dishes
2 days ago in LP Teaching LP
- Meet Our Design Captains!
6 days ago in NYC Design Competition
- Conference Room Design Competition
1 week ago in NYC Design Competition
- LP EMEA Triathlon Team support Leukemia Research
1 week ago in LivePerson Cares

Poll the Nation

When do you prefer to ride [LP Mountain Bike Club (Israel)]?

Friday morning (10%)

Friday afternoon (20%)

Saturday morning (70%)

You voted for this Leave comment

10 Votes - 1 Comments

Featured Content

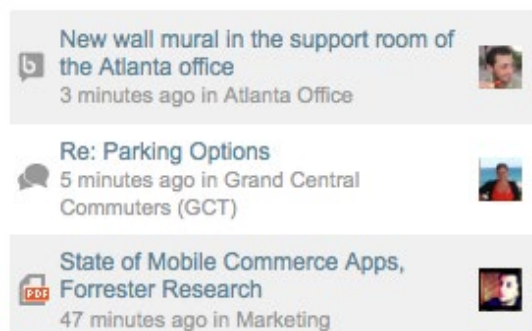
- Act Globally. Think Locally with your new phone system
4 days ago in JR Lantieri's Blog
- LP News Update June 2nd
2 weeks ago in Nation Spotlight
- Insights from the eG8 Forum in Paris
2 weeks ago in Road to Outstanding
- Skill and Will
3 weeks ago in Road to Outstanding
- LP News Update - May 16
1 month ago in Nation Spotlight

Have a story you'd like to share? Contact Erin Kang to get featured!

LivePerson Nation Home Top of page LivePerson Nation powered by Jive SBS® 4.5.5.0 community software

Pictured: Company content and personal content live harmoniously on the LivePerson intranet's homepage. Company-related content is located at the top (orange headings), and personal content below that (green headings).

Work Stream



Market News



Pictured: A zoom in on some of the homepage's news items shows the icons, images, and section refresh icon.

Anyone at the organization can blog about business or work using video, text, or a combination of the two. The CEO himself sets an example and posts videos and stories that inspire employees. In one example, he introduced a video blog by writing about the topic, listing the names of people who were interviewed in the video, and offering a link to more information about the video's main topic. It is very helpful to list topics and who is involved so users know what to expect before they launch the video. Having the names written out can also help employees find new people to follow. Also, listing names and topics in text with the video is crucial to helping the search function bubble-up video content correctly.

When users are on their own blog page, various editing actions and a list of recent comments appears in the right rail. When viewing another person's blog, the right rail displays *Popular Blog Posts* as well as *Active Blogs*. Positioning these actions and information in a way that's easy to view and access makes blogging and reading blogs an attractive activity.

People
Blogs
Discussions
Groups
Documents

LivePerson Nation > Road to Outstanding > 2011 > March > 30

Road to Outstanding

< Previous
 Next >

Thoughts from the March Leadership Session-- video

Posted by Rob LoCascio on Mar 30, 2011 6:25:07 PM

I wanted to share with the whole company some thoughts and highlights from the March Leadership Session through a brief video.

Interviewees include myself, Cliff Dorsey, Amit Levran, Amir Shub, Shelbi Scott, Gilad Komorov, and Peter Phillips.

ROBERT LOCASCIO
CEO, LivePerson

00:05 / 08:36

Read Notes from the Leadership Session [here](#).

206 Views Tags (edit): video, qbr, nationpulse315 Like (3)

Average User Rating
 ★★★★★
 (0 ratings)

My Rating:
 ★★★★★

Actions

- Manage blog
- Edit post
- Move post
- Delete post
- Receive email notifications
- Send as email
- Report abuse
- View as PDF
- View print preview
- Add to featured content
- Bookmark this

Recent Comments

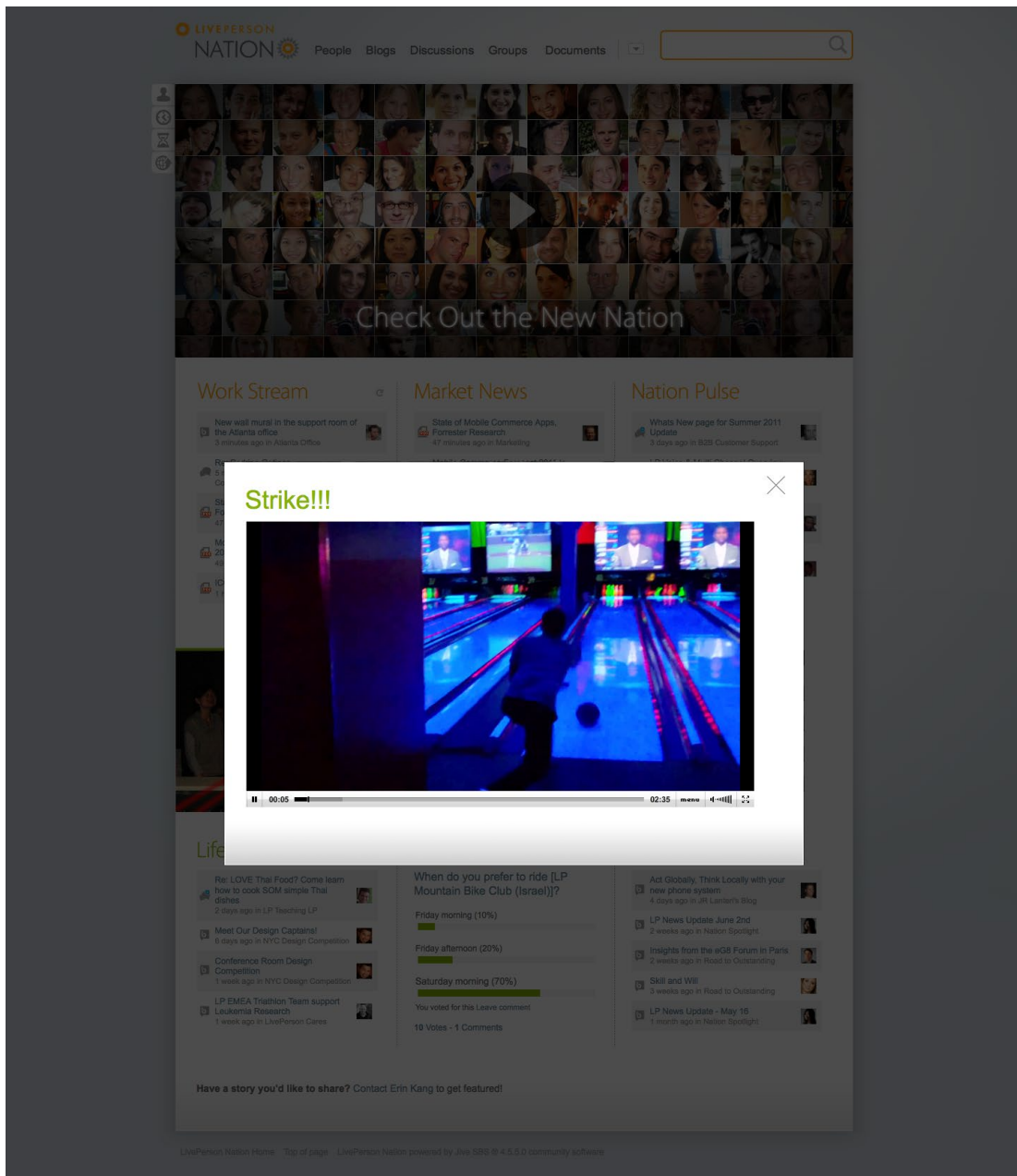
- Rob LoCascio on Update: Quarterly Board of Directors Meeting
- Rich Adler on Thoughts from the March Leadership Session-- video
- Ariel Cohen on And the Award goes to...LivePerson Israel for Helping Others

Popular Blog Posts

- Skill and Will
- Welcome David Vaskevitch to LivePerson's Board of Directors
- Insights from the eG8 Forum in Paris
- Rob's Travel Tip for the LP Frequent Flyer
- Update: Quarterly Board of Directors Meeting

Pictured: The CEO sets a good example in his video blog posting, providing good video content, a list of names of people involved, and a link to further information about the topic.

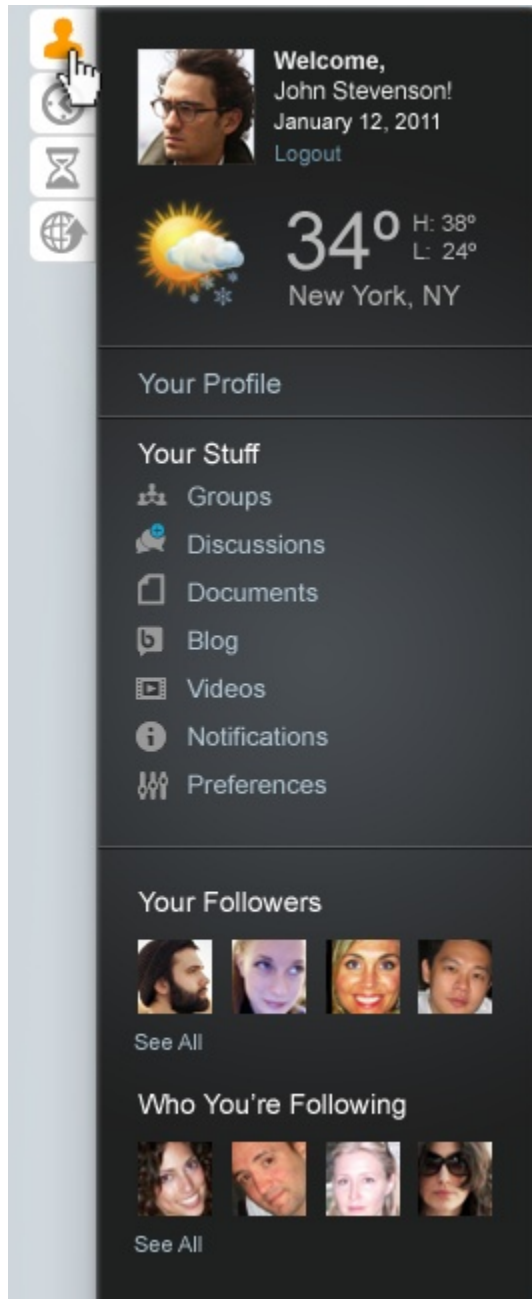
Although the written word can be exciting, one sure way to feel connected to coworkers is to witness them in action. Thus, the homepage's two marquee banners—one on top, one in the middle—serve as a platform for company events and news, and personal accomplishments and stories, respectively. These banners are linked to an overlay of a high-quality video or a slideshow. To play the video, users click on either the image or the *Watch Video* link, which launches the video in a light box. Here, users are offered helpful controls such as pause, a timeline, volume, and increase size.



Pictured: Videos play in a light box with timeline control, volume control, a pause button, and an expanded-view option.

On the homepage and all other Nation pages, the subtle menu and search functions display at the top. And, rather than taking up valuable page real estate or using the usual menus, the designers chose to put pertinent information on slide-out panels. These are accessed via the four icons, known as *utility buttons*, in the upper left. Hovering the cursor over an icon slides out the panel and changes the icon from monochrome to an orange fill, making it easy to distinguish which one is selected. Through these panels, employees can view various choices laid out together in an easily scannable format. Making personalized and customized links available is one good way to engage people and help them to proceed with their work.

The first icon opens a panel with a photo of the logged in user, his or her name, the date, a *Logout* link, the local weather, and the location. The panel also lets users access and edit their profiles and offers links to their groups, discussions, documents, blogs, videos, notifications, and preferences. Finally, the panel displays people who are following them and the people they follow, along with *See All* links for a complete list.



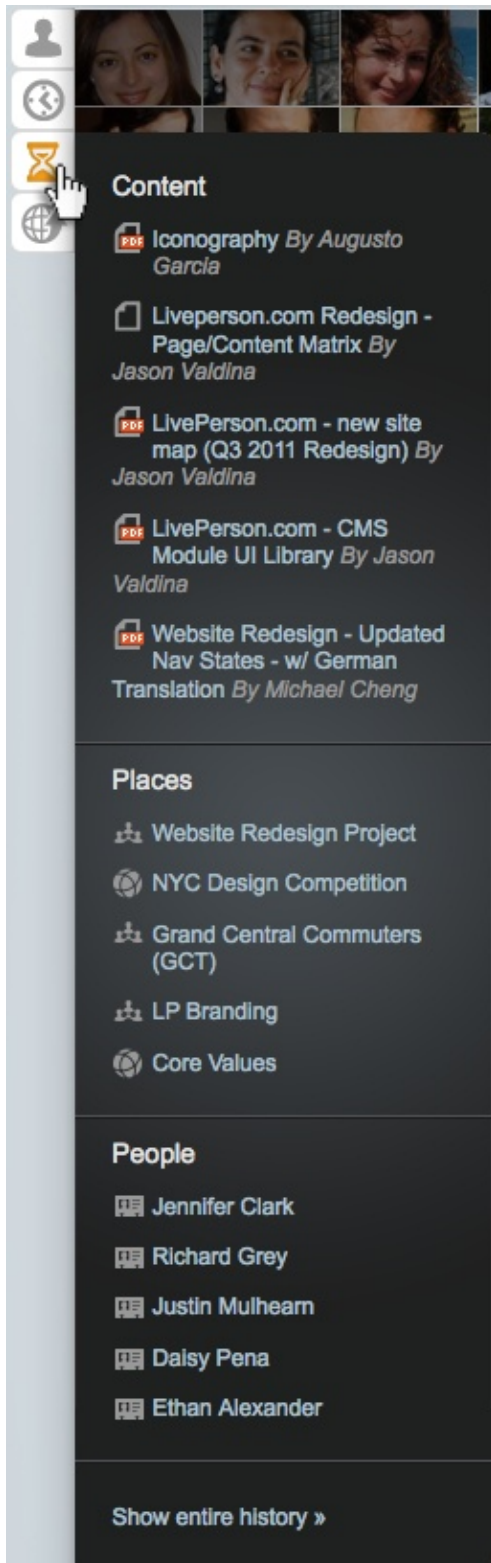
Pictured: As this example shows, the first slide-out panel houses personal information, such as links to the user's videos and documents, and a list of people who are following him.

When deciding whether to call up colleagues or estimate when they might respond to messages, it helps to know the local time in their locations. The second slide-out panel resolves this, displaying local times for office locations in New York City, Atlanta, San Francisco, Seattle, London, and Tel Aviv.



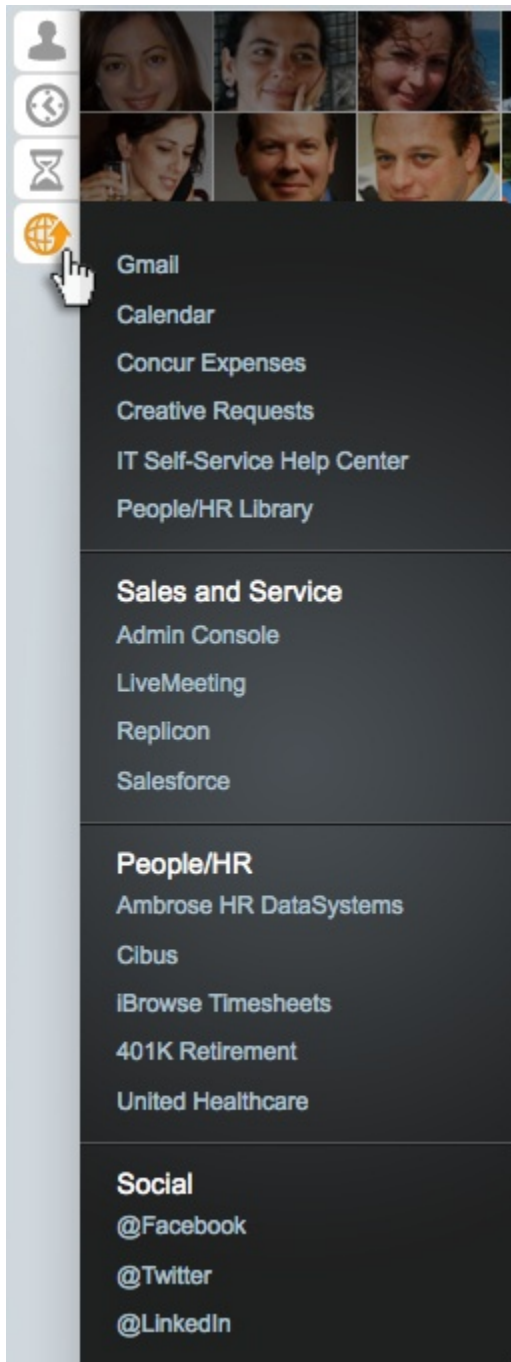
Pictured: The second panel displays local times for the offices around the world.

In the third panel, users can view their most recently accessed content and places, and see the people they've interacted with. Each section is short to avoid inundating users. A *Show entire history* link at the bottom lets users see more if they so desire.



Pictured: Users can view their most recently accessed content in the third slide-out panel.

The fourth and final panel houses the user's favorites, social websites, and links to commonly needed corporate content.



Pictured: The fourth panel includes the user's bookmarks, links to frequently accessed corporate content, and links to social websites.

As the organization grows, the intranet designers have ensured that Nation meets the goals of increasing efficiency in collaboration and fostering personal connections

among employees. The intranet supports and treats all LivePerson employees—from software engineers to corporate lawyers—alike. Regardless of team or time zone, Nation provides an enjoyable medium for making connections, and a peek into each other's work processes and lives. The UI and content gently take people by the hand and practically plead with them (in a good way) to participate again and again.

BACKGROUND

In the spring of 2010, LivePerson held its very first global all-company event. This occasion made it very clear that there is great value in having all employees in one shared space, socializing, collaborating, and sharing information; the event sparked the idea that replicating the offline experience online would greatly benefit the company.

"Our challenge to ourselves was to come up with a solution to replicate this same spirit and energy without the physical limitations of several different offices spread out around the world," says Myke Mansberger, Enterprise Community Manager. "We solved the problem by creating a robust intranet that ultimately became our employee community: a virtual HQ for everything LivePerson."

The community's mission is to organize and socialize information about the company's products, people, and culture. "Also," says Mansberger, "it is an effort to foster collaboration, connection, and innovation between employees across the globe. The ultimate goal of our intranet is to be the main channel for communication within LivePerson's employee workforce."

The intranet's initial version was pretty much an out-of-the-box installation and was intended as something of an experiment. "Once more and more employees began to really adopt the intranet to share information and socialize, we realized that we needed to rethink the structure and flow of the design," says Mansberger.

To ensure the intranet's success and adoption, the team conducted employee surveys to learn more about the type of information people were looking for and how they preferred to receive it. The new homepage was designed based on the survey's outcomes; a majority of employees said they wanted a comprehensive, intuitive experience that let them share work-related content and discussions, as well as learn more about their peers on a personal level.

Another research technique the team used was to follow the influencers: "We also tracked our users to find out who our top contributors were and what content was getting the most views," he says.

The research ultimately set the team on a design path that would best spotlight and feature employee success stories, corporate culture, and collaboration.

With an established project plan in place and key stakeholders providing support, the team encountered relatively few challenges with the rollout.

People
Blogs
Discussions
Groups
Documents

[Home](#) > [Creative Group](#)

Creative Group

[Overview](#)
[Members](#)
[Discussions](#)
[Documents](#)
[Reports](#)
[Polls](#)
[Videos](#)

Group Overview

Creative Group

Open Group

We throw our hearts, minds, and souls into every project – be it branding, advertising, or interactive. Our department strives for excellence and we're always looking to transcend the status quo. Stop by, say hi and share some ideas with us.

Group Owners: Augusto Garcia, Michael Cheng

Tags: liveperson, help, activities, event planning, creative

Featured Content

- Conventions, Seminars and Events
3 hours ago by Lynda Mota
- Photography Ideas and References
2 weeks ago by Augusto Garcia
- Brand and Naming Matrix
28 days ago by Adrian Elim
- Photo from NY Team Outing
1 month ago by Myke Mansberger
- VzW iPhone support operational plan
3 month ago Adrian Elim

Popular Discussions

- Agenda for Creative Meeting
1 minute ago by Lam Nguyen
- Tilt Shift Time Lapse Photography
3 minutes ago by Lilach Nadler
- Elegant way to show extra content ...
12 hours ago by Clare Waburton
- Designing for Mobile
3 days ago Alex Peterson
- Very interesting! The future of UI
1 week ago by Howie Blumenstein

Recently Joined

Adam Lamartine
joined on June 2, 2011

Jennifer Katz
joined on May 12, 2011

Sarah Parker
joined on May 9, 2011

Jillian Ramos
joined on March 26, 2011

Actions

- Start a discussion
- Create a document
- Create a blog post
- Manage Announcements
- Create a poll
- Create a project
- Manage categories
- Invite people to join this group
- Send email to group
- Leave this group
- Create a video

Top Participants

- Augusto Garcia
- Clare Warburton
- Lynda Mota
- Doron Breuer
- Michael Cheng

[LivePerson Nation Home](#)
[Top of page](#)
LivePerson Nation powered by Jive SBS © 4.5.5.0 community software

Pictured: A department page showing featured content, discussion threads, and member information.

INTRANET TEAM



Pictured: The LivePerson intranet team (left to right): Augusto Garcia, Myke Mansberger, Rich Adler, Giancarlo Trentini, Paul McCarthy, Erin Kang, and Mike Cheng. Absent from photo: Clare Warburton and Lynda Mota.

GOVERNANCE

Ownership

The LivePerson intranet is administered and managed by the company's Community Team, which is part of its corporate division based in New York, reporting directly into the company's team of C-level executives. This placement has proven a successful match for supporting the intranet work.

"By nature, the Community Team understands the complexities, goals, and missions for sustaining a thriving online community," says Mansberger. "Having managed two customer communities prior to our intranet, it was natural for the Community Team to take on this initiative."

Intranet team members' responsibilities break down as follows:

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Executive Sponsor (Paul McCarthy)	- Review and approve key policies and guidelines - Align objectives and roadmap to corporate strategy and key initiatives
Technical Program Manager (Omer Barel)	- Develop and maintain platform - Install upgrades and customizations
Enterprise Community Manager/Intranet Manager (Myke Mansberger)	- Develop methodology for ongoing growth and adoption of the intranet and employee community - Evangelize and educate employees on the intranet's value - Create instructional content for users to encourage early adoption and continued usage - Market and socialize successful results back to the employee community
Senior Art Director (Michael Cheng)	- Maintain aesthetic and brand personality - Adhere to best practices and usability standards
Senior Web Developer (Clare Warburton)	Provide coding and technical management of the platform to meet business requirements and provide customizations

USERS

Each of the organization's departments and working groups has an intranet presence, but some have taken advantage of the opportunity to become "more transparent" by using the website. The following are just a few examples of how that has been done successfully:

- **IT:** IT uses their intranet space as their main communication hub to all employees. Users can find the latest software updates, how-tos, and up/downtime status for various systems; they can also submit help tickets, fixes, and new software requests.
- **Marketing:** Marketing provides updates on products, events, and industry news. Mansberger says this content has been a great way for employees in various roles around the company to join one another in reading and discussing the company's goals and mission.

- **Client Managers:** “Our Client Managers have really taken advantage of the collaboration aspect of the intranet,” says Mansberger. Managers use their space to share best practices, share feedback from the field, and ask and answer questions from peers, all in an effort to provide the best possible customer experience for the accounts they manage.

LIVEPERSON NATION People Blogs Discussions Groups Documents

LivePerson Nation > People

Jennifer Katz

Following 86 | Followers 64

Profile Groups Blog Photos Videos Documents Discussions Pages

Administrative Assistant
Marketing Department
jkatz@liveperson.com

Location: Tel Aviv, IL
Member Since: 12/30/2010
Last Logged In: 12/31/2010 10:30AM
Mobile Number: 917.421.7509
Home Number: 212.655.9087
Hire Date: 10/01/2009

Groups
Creatively Creative Web Operations Team LP Branding Engage Website Redesign Project Labs The Delta Team Putting Ideas into Action LivePerson Website Engagement Summit Platform APIs & Ecosystem User Experience New Hire Introduction to Company (Creative) Israel Nov 2010 Launch Event LivePerson Website Engagement Summit Platform APEcosystem User Experience New Hire Introduction to Company (Creative) Israel Nov 2010 Launch Event LivePerson Website Engagement Summit Platform APIs & Ecosystem Copany (Creative) Israel Nov 2010 Launch Event LivePerson Website Engagement Summit Platform APIs & Ecosystem

Recent Activity

Jennifer Katz posted 5 minutes ago

Comments (4) Likes (2) Repost Permalink

Jennifer Katz posted 45 minutes ago

Don't forget Rob's surprise b-day party at 3PM in the common area!

Comments (56) Likes (96) Repost Permalink

Jennifer Katz posted 3 day ago

2011 Company Directory has been updated by yours truly =)

Comments (23) Likes (16) Repost Permalink

Actions
Change photo & avatar
Edit profile & privacy
Edit preferences
Change password
Manage email notifications
Download vcard

Your Blog
Design-Inspire-Revolutionize

Your Most Liked Content

- Microsoft Future Vision Montage - iPad who?
- Amazing animation for MTV
- Tiffany 4D Storefront Advertising
- Mobile Design Toolkit
- "We are the ants" Tilt Shift Photography
- LivePerson Spaces - the new Israel office!
- Upper East Side Commuters Taxi Pool

LivePerson Nation Home Top of page LivePerson Nation powered by Jive SBS © 4.5.5.0 community software

Pictured: A user profile page with photo, work-related details, and recent activities.

[People](#)
[Blogs](#)
[Discussions](#)
[Groups](#)
[Documents](#)

Nation > People

People (607)

Sort: Date Joined

1

47

48

49

50

51

Previous
Next

Hugo Thomsen OCM Joined on Apr 16, 2010	Barry Lamm Director Joined on Apr 16, 2010	Paul Kitchen Programme Manager Joined on Apr 16, 2010
Shelbi Scott Regional Program Director Joined on Apr 15, 2010	Sevonne Eliyahu Product Consultant Joined on Apr 15, 2010	Augusto Garcia Aesthetics Crusader Head of Creative Joined on Apr 14, 2010
Lida Tabibian Success Manager Joined on Apr 14, 2010	Clare Warburton Joined on Apr 14, 2010	Noa Adamsky Director, Product Management Joined on Apr 14, 2010
Brian Migdol Program Manager Joined on Apr 13, 2010	Jennifer Nichols Affiliate Marketing Manager Joined on Apr 13, 2010	Keri Philcox IT Administrator Joined on Apr 13, 2010

Search People

Filter this list

Show online only
 Show recently joined only

By Job Title:

By Department:

Filter

By Location:

By Languages I Speak:

[Nation Home](#)
[Top of page](#)
 Nation powered by Jive SBS® 4.5.5.0 community software

Pictured: An employee directory page.

URL AND ACCESS

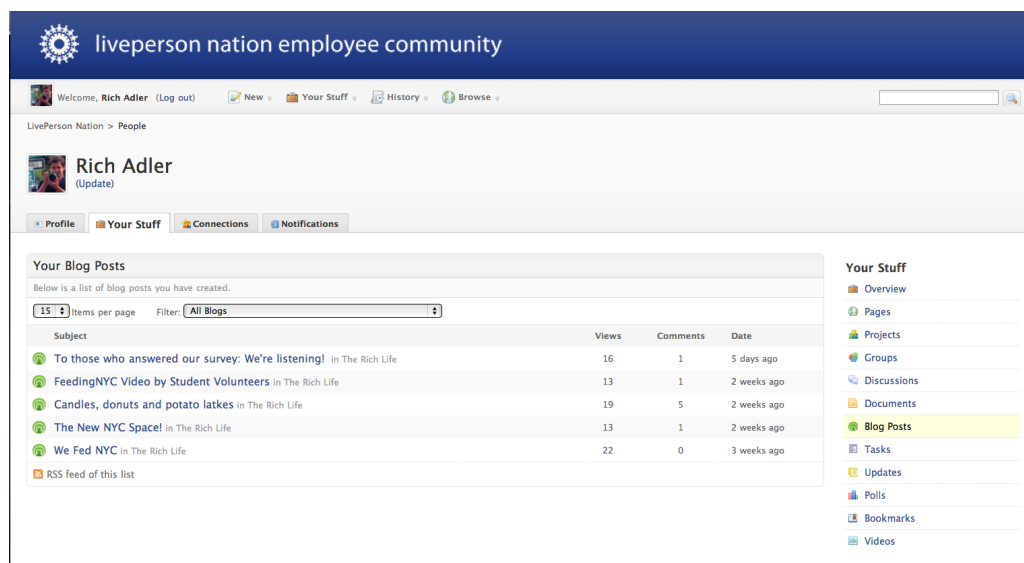
ACCESS INFORMATION	
Item	Status
URL	https://nation.liveperson.com
Default Status	The intranet is set as each user's homepage (by default) and also bookmarked in all browsers.
Remote Access	The website is hosted on a secure server that can be accessed remotely and via mobile device; this functionality is well used by the entire workforce.

DESIGN PROCESS AND USABILITY WORK

The team used an array of user-centered research techniques throughout the project, including: conducting field studies and surveys, sitting in on support calls, usability testing the old site, designing prototypes for the new site, and re-testing once the site launched. But, among these many methods, the team found the survey to be most useful. "Surveys worked best to get both a general consensus and detailed feedback on the intranet," says Mansberger.

According to Mansberger and the intranet team, the previous intranet was clunky, difficult to navigate, and "aesthetically uninspired."

"Content was not laid out in an intuitive way, and our users became agitated and overwhelmed," he says. "This notion was confirmed after we conducted our usability questionnaire to gain a better understanding as to why employees were so frustrated."



Pictured: A screen from the old intranet site, showing an employee's profile page.

The Questionnaire

The team decided that the first step to creating a better intranet experience was to hear from the users themselves, so the team came up with a list of usability questions and sent them to every employee.

Users were asked to rate the following statements on a scale of 1 to 5:

- The site is easy to navigate.
- I can get to information quickly.
- It is fun to explore the site.
- It is easy to remember where to find things.
- Information is layered effectively on different screens.
- The homepage grabs your attention.
- Titles and general information are written in a style that suits me.
- The site effectively communicates the company's identity.
- The site's content would keep me coming back.
- The site has a clear purpose.
- I like the variety of widgets and features that Nation offers.

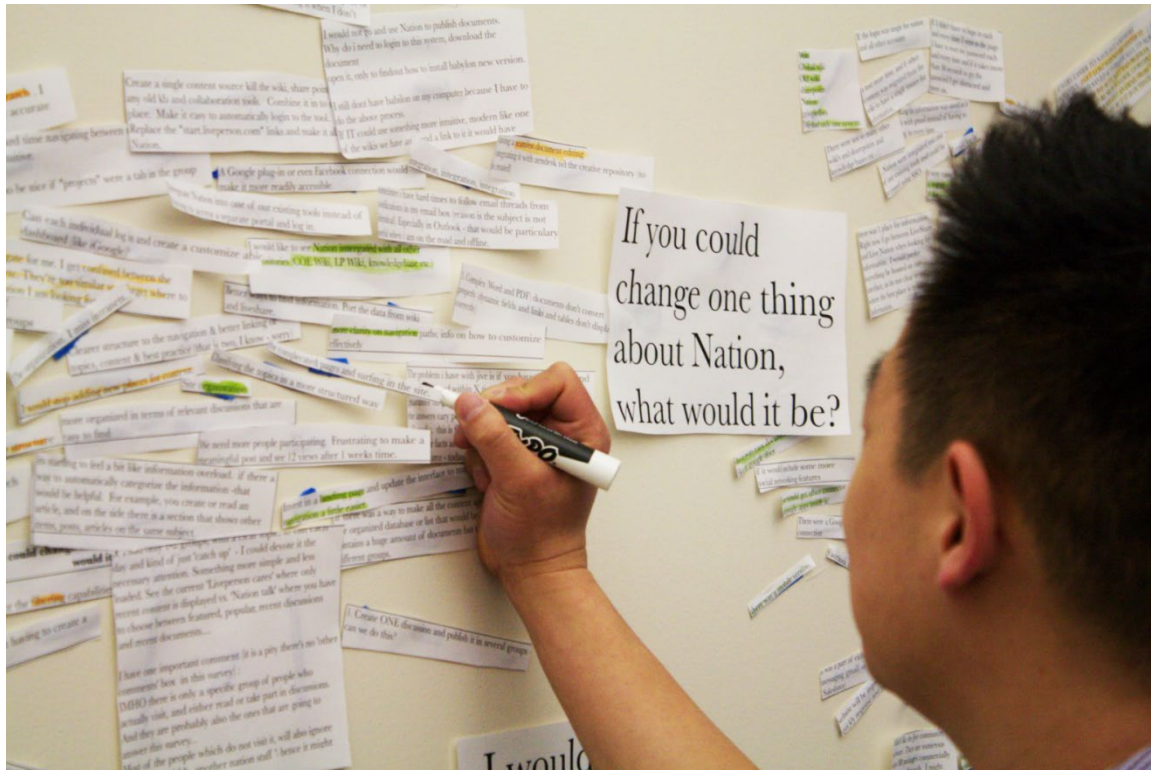
The survey also included a section of yes/no questions and a few open-ended questions to give users an opportunity to suggest site improvements.

One of the key findings from the research was that no winner emerged on the browse-versus-search question for locating information; users were equally split between the two. So, the team had to ensure that both methods were easily accessible and taken into account during the design process. Findings such as this were invaluable in making site improvements during the design and architecture phases.

"The feedback was tremendous," says Mansberger. "Over 75 percent of the employees responded to the survey with their 'gripes' as well as ideas and suggestions on how to make the intranet a better user experience."

The team printed everything out, cut each comment into individual snippets, and taped all the comments onto a feedback wall. "We used this approach as a way to visually identify patterns and trends of what users disliked or desired the most," he says.

"The questionnaire was crucial to the success of the new intranet because the team saw the value in the end user's experience. We chose not to redesign in a bubble, but rather, we built it for the people," says Michael Cheng, Art Director.

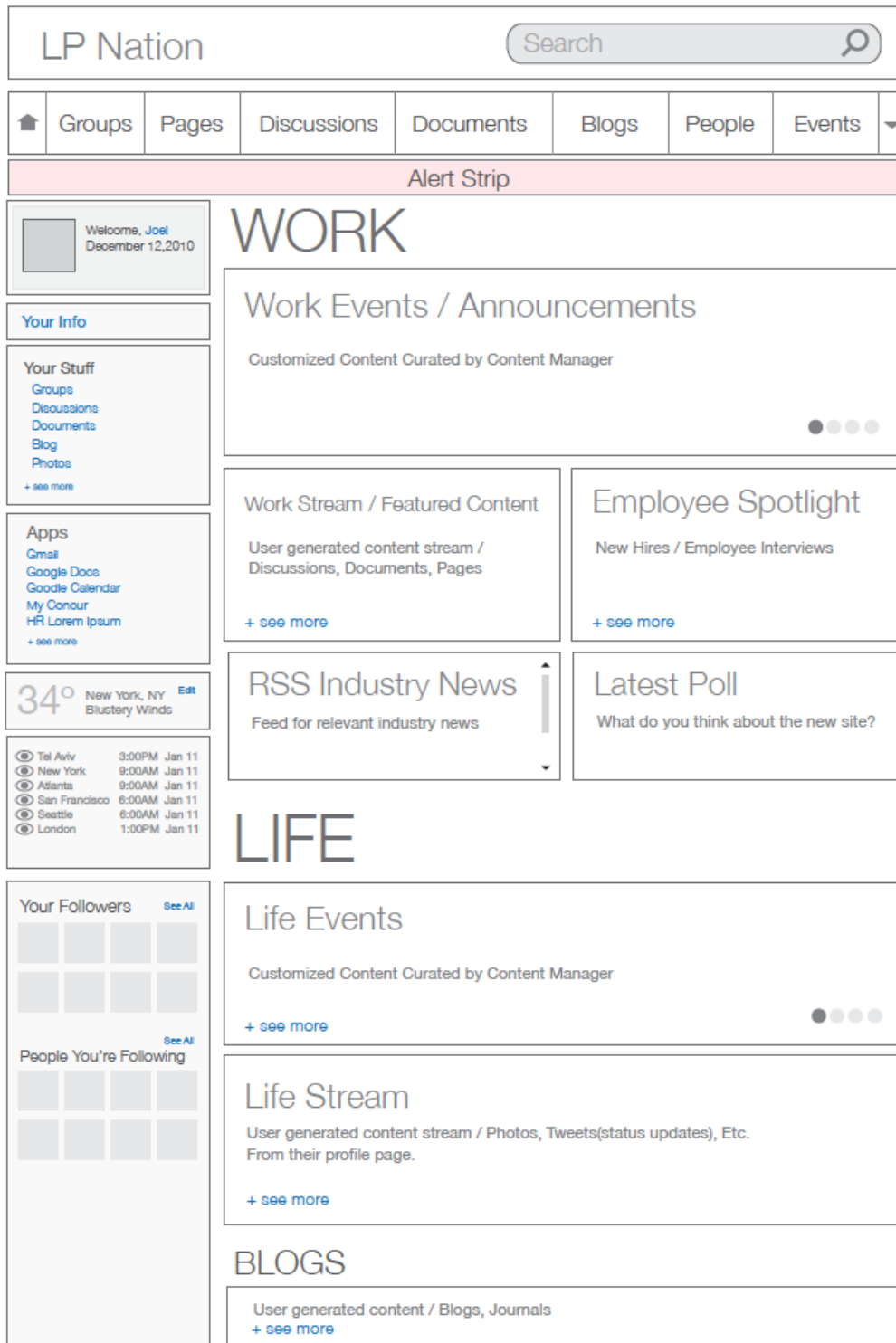


Pictured: The company's Senior Art Director, Michael Cheng, reviews the ideaboard that the team used to collect and display feedback during the design phase.

Information Architecture/Wireframing

With the survey results in hand, the team then went to work re-architecting the site from the ground up, starting with creating a comprehensive user-experience deck that addressed the feedback from our users.

"The goal was to transform the intranet from a loathsome duty for employees into a destination that they would embrace and visit multiple times daily," says Cheng, who led the project's Information Architecture phase.



Pictured: A wireframe page from the team's user-experience deck.

Visual Design

Once the UX deck had been vetted and the team received sign off from all stakeholders, they moved on to the design phase.

"This is the most visceral component of the redesign process, and our goal was to create a design that was both compelling and impactful without compromising the usability factor," says Cheng. "We decided on a contemporary and visually striking aesthetic, which turned out to be a huge success."

The new design was received exceptionally well, and the team received countless kudos from employees around the globe.

Implementation/Development

With the planning and design in place, the team was left to focus on pulling it all together on the back end.

"Now it was up to the development team to wrangle the JIVE SBS default templates to build out a custom theme that stood up to the design requirements the team had set up," says Clare Warburton, Senior Web Developer. "Rather than build the theme from scratch, we built a sub-theme on top of Jive's default theme."

This meant that the bulk of the team's work was in manipulating the CSS and HTML. And, because they were all new to Jive's template building, this wasn't an easy task. "We had one advantage though," she says, "we were a tech company with tech-savvy users. Compared to building a site for customers, we were assured that we were building a site for early-adopters who were almost exclusively using modern browsers. This meant we could use CSS3 styles like drop shadows, text effects, multiple backgrounds, opacity, etc., without worry. As a coder, this was a luxury!"

Prior to finalized design comps, the development team had detailed wireframes for each section, which let them test out more complicated functions and get a jump-start on any integration issues. The initial html layout was created outside of Jive; the design team reviewed the functionality and animations as they finalized the wireframes and designs. This kept things moving and gave all teams a sense of working toward a common goal.

"The best part of developing the site was the true sense of 'Nation-building' that everyone on the team shared," says Warburton. "Developers, designers, and project owners talked daily about the tasks and issues on hand. Issues were resolved by everyone being flexible and open to suggestions for all team members."

TIMELINE

INTRANET TIMELINE	
Milestone Date	Milestone Description
January 2010	Confirmed contract with Jive Software to provide a community-based solution for the communications needs of all external-facing online properties
March 2010	- Held an all-company event in Israel to discuss the organization's core values, culture of meaningful connections, and innovation - Decision made to install community-based solution for intranet and employee community
June 2010	Alpha version of intranet (out-of-the-box) deployed to all locations
November 2010	User survey conducted to obtain feedback and identify usability gaps in an effort to improve site usage and create opportunities for collaboration and content generation
March 2011	Launch of new design for "Nation," the company's employee intranet

CONTENT AND CONTENT CONTRIBUTORS

The team chose Jive Software as its social business software solution; in that role, the technology also serves as the CMS. "It had the features and tools we needed to showcase and highlight employee content and collaboration in an intranet and community environment," says Mansberger.

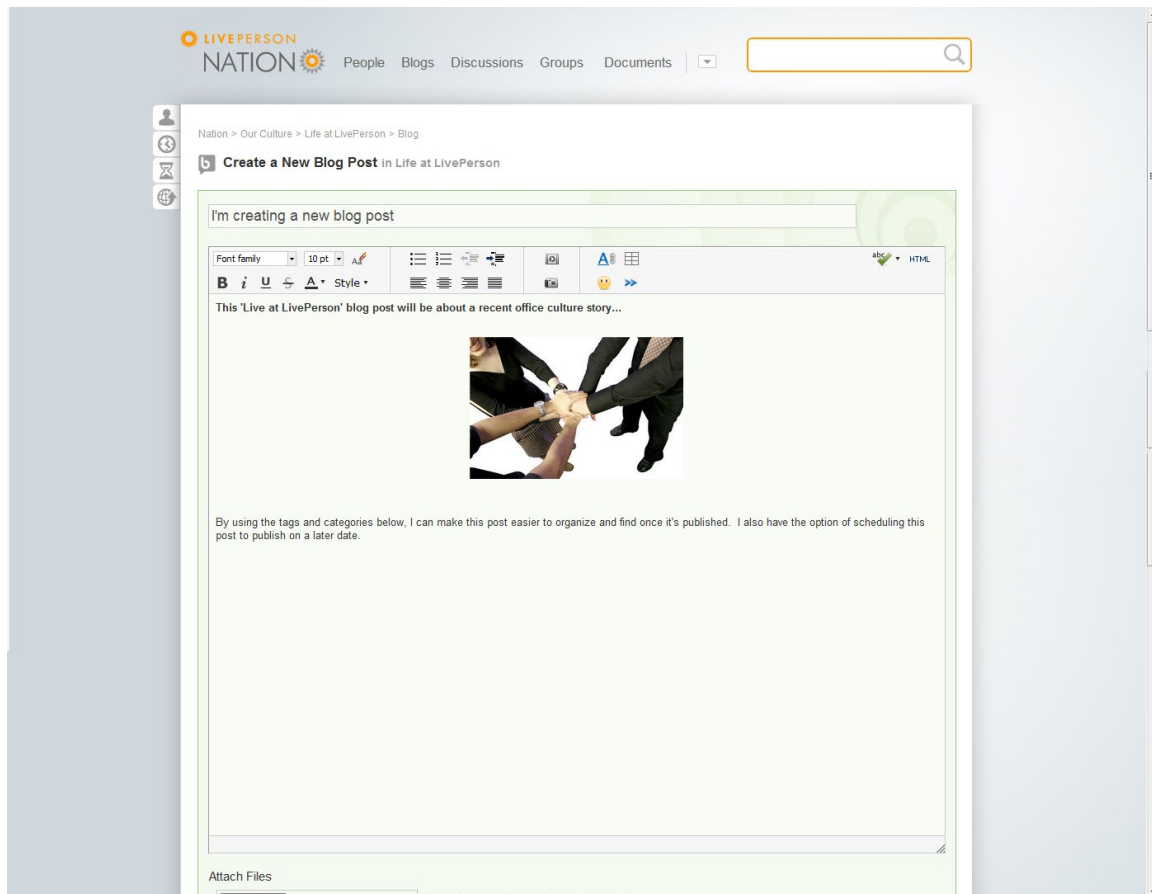
This open, social approach is guiding every aspect of the intranet's content. Every employee is on-boarded as a user and, as such, every employee can create content right from the get-go. As part of the company's new-hire welcome experience, employees are asked to explore the intranet and create content. The team also provides ongoing guidance and training on a departmental and one-on-one basis.

"On average, we have about 250 users adding fresh content to the site on a monthly basis," says Mansberger. "This amounts to 52 percent of our employees being direct contributors to the intranet."

The community and communications team manages the site's curation duties. They review content generated from the entire employee community and feature some of it on the homepage as well as in internal newsletters.

"When we decide to feature a user-created story or content piece," he says, "we may provide them with feedback and an opportunity to spruce up their content before it gets featured. Sometimes just adding a few images or a couple extra lines of context goes a long way."

Users are given a system of categories and tags so they can better organize their content.



Pictured: The UI for adding, editing, and tagging content. When users create content, they have the option of saving as draft, scheduling a publish date, or publishing on-the-fly. By using categories and tags, users can quickly make the content easy for other users to find.

"The success of this type of intranet really depends on how quickly and easily users can find the content they are looking for," says Mansberger. "As the Community Manager, my contribution to this success is to ensure that our employees understand how to best create their content to make it easy to find later. I also take the time to browse content and enhance it by adding additional tags or making content visible in multiple places. I call this 'gardening.'"

TECHNOLOGY

The company's intranet is hosted by an SAS platform vendor, Jive Software. All of the customizations in the intranet/community have been engineered internally at LivePerson and deployed on the platform hosted by Jive.

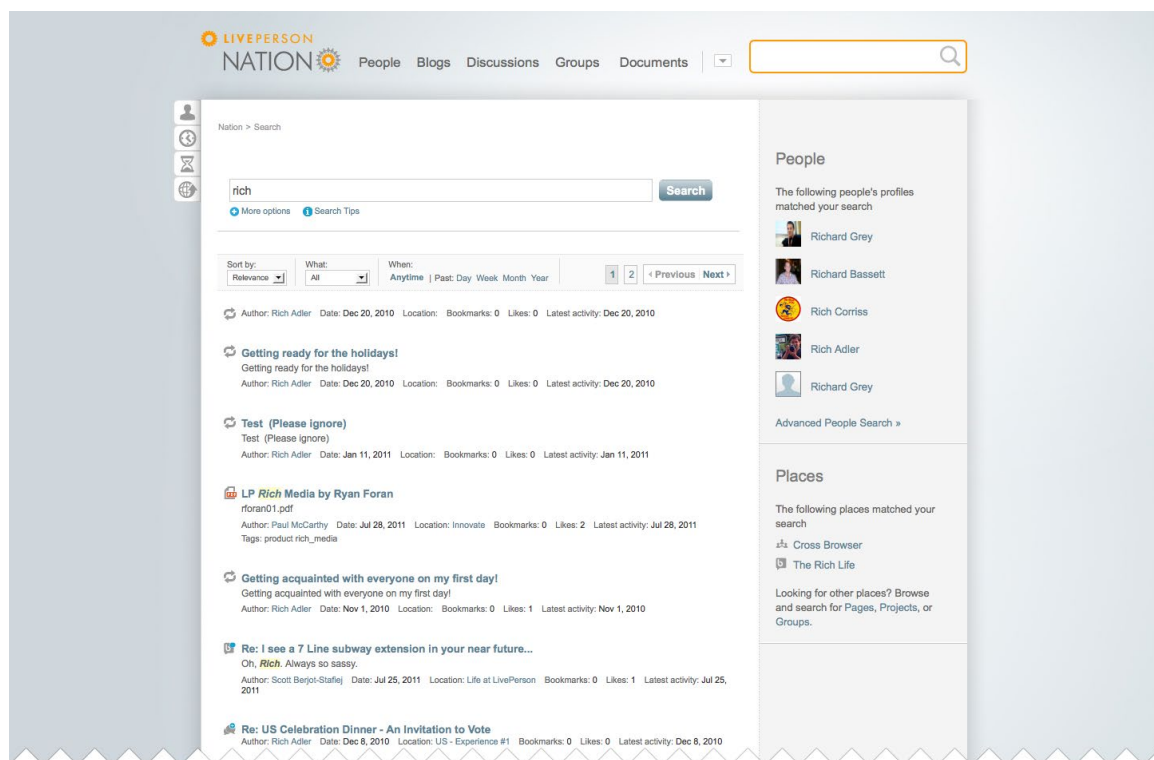
MOBILE

The intranet is accessible by any mobile device or smartphone with a browser. At this time, nothing has been customized specifically for mobile use, but the team definitely plans to tackle this in the near future.

SEARCH

The site's search tool is JIVE's built-in search tool.

The team's research revealed that there was a near-even split in the site audience between searchers and browsers as far as information-gathering goes. "But we knew that over time people would eventually use search as the first option for finding relevant information," says Mansberger. "Once our users were given best practices for creating content (such as tagging, naming conventions, etc.), search results became more and more relevant."



Pictured: An example search results page.

RESULTS AND ROI

Since the expansion of the intranet, the company has been able to gain valuable insight on how its employees collaborate. "For example," says Mansberger, "our users create over 150 new discussions each month and 52 percent of our employees are adding new content to the community intranet on a monthly basis."

The key reporting metrics the team uses focus on unique visits, content creation, participation, key influencers (top users), adoption (percentage of the company who has done XYZ), and activity per sector (working groups, departments, info spaces).

"Our metrics help us understand the story of what's happening in our company," he says. "It allows us to see a clear picture of which departments are active on the intranet, which global locations are tuned in, and what types of content our employees are interested in sharing and interacting with. This kind of information is valuable for planning additional training, marketing, and improvements to the intranet."

LESSONS LEARNED

LivePerson team members share their experiences developing the company's intranet:

- **Design for the users, not for yourselves.** "As designers, we often times take too personal of an approach towards our work and lose focus on the most important factors: listening to and knowing your audience. Always remember, we're not designing websites for ourselves, we're designing the best possible experience for our user base." (Cheng)
- **The intranet is never done.** "It's important to never consider the job complete. As your company grows, you will need to continue getting feedback from users and updating the intranet to suit their needs." (Mansberger)
- **The line between personal and professional is fuzzy.** "We were building the intranet originally to manage the business needs of departments and functional groups within the organization. We found that by incorporating community elements into the architecture, many people formed connections based on activities outside of the functional groups/areas. These activities resulted in increased usage of the community overall and then adoption in other key functional areas based on things that were relevant to them outside of those groups that originally caught their attention. While this was a strategy we hoped to achieve, I am amazed at how our top group varies daily between sports lovers and our Client Managers group. It's safe to assume we love watching the best goals achieved during the day — whether in sports or with our customers." (McCarthy)

Acorda Therapeutics, Inc. (2013)

Using the intranet: Acorda Therapeutics, Inc., is a biotechnology company whose mission is to develop and market therapies that restore neurological function and improve the lives of people with multiple sclerosis, spinal cord injury, and other nervous system disorders.

Headquarters: Ardsley, NY, U.S.

Number of employees the intranet supports: 350

Company locations: U.S., with a presence in other countries through external partnerships

Locations where people use the intranet: U.S.

Annual sales: Forecast of \$280+ million annual sales in 2012

Design team:

Klick, a third-party digital agency, designed, developed, and implemented the intranet in collaboration with project management and departmental representatives at Acorda.

Members:

Klick: Michael Melnick, Director, User Experience; Neville Thomas, Program Director; Barry McKelvey, Director, Project Management; Cynthia Dahl, Senior Technical Architect; Peter Cheung, Associate Director, Analytics; Yamini Ramamoorthy, Associate Creative Director; Mark Hadfield, SVP, Program Delivery; Mark Donaldson, Senior Web Developer; Armando Narvaez, Manager, Quality Assurance

Acorda Therapeutics: Mike Russo, Senior Director, Corporate Digital Strategy & Innovation; Kyle Kuhn, Associate Director, Business Development; Pasqual Zottola, Senior Director, IT

SUMMARY

Improving communication, preserving culture, and ensuring intranet adoption were the goals that digital agency Klick set out to accomplish when creating Synapse, the intranet for Acorda Therapeutics. Having outgrown its previous site, the biotechnology company saw the need for an internal technology change to support its growing needs.

Acorda brought Klick in on the basis of previous collaborations and their similarities in company size, growth rate, and culture. Klick also has its own intranet, Genome, which helps the company increase operational efficiencies and enables the use of analytics for decision-making.

Klick knew that any intranet must meet the needs of its users. Acorda's employees are busy developing and marketing therapies that restore neurological function for multiple sclerosis, spinal cord injury, and other nervous system disorders. Its approximately 350 employees are already pressed for time, and the Acorda/Klick team concluded that to successfully implement a new intranet system, it would need to be fairly intuitive and require a minimal investment of employees' time. In addition, given other priorities, the intranet could not introduce major organizational changes. This was a challenge, as one of the main objectives was to more fully integrate the intranet into employees' day-to-day lives at work—which was a big change from the existing intranet's somewhat marginalized role.

The Klick team started the project with interviews and contextual inquiries, trying to understand the company, culture, employees, and business needs. An interview guide, used for consistency, asked not only about areas of improvement and how a better intranet could make employees' work easier, but also about what motivates and inspires employees and why they love working at Acorda. The Klick team wanted to make the intranet a place that employees wanted to go, and knew a strong awareness of the company's culture could help them create a site to meet employees' needs as well as provide the content they were most interested in.

The company intranet had to serve as a useful tool both for getting work done and for connecting with the company. Klick recognized that it needed to get employees excited about the new site before its launch to help its reception. Because the existing intranet was not widely used, Klick planned a campaign featuring posters placed around the office to draw employees' attention and highlight the benefits of using the new site. They also had a "name the intranet" contest, with the tempting prize of an iPad for the winner (resulting in the site name: "Synapse"). They used a humorous "People You Know" campaign, creating posters with actual employees (including the CEO) highlighting some of Synapse's functionality and reflecting the fun Acorda culture.

Now you won't have to ask
Dane to reset your password.
Again.



No more need to remember 10 different usernames and passwords.
Our Acorda Intranet features **single sign-on** for websites that require
a separate log-in, so you can quickly access the information you need.
It's just one way the Acorda Intranet is helping the way you work.

ACORDA
THERAPEUTICS

Pictured: The "People You Know" campaign posters garnered laughs but also educated users as to the benefits of key intranet features.

The homepage is built to communicate messages as well as enable daily work. A three-column design focuses on productivity-based tools on the left, news in the

center, and culture and events on the right. A mega menu drop-down offers quick access to internal pages, and a pervasive footer includes links to the latest winners of a company award, an acronym decoder, and tertiary navigation.

The top of the page conveys timely messages, alerts, or reminders, drawing the users' attention. The left productivity column includes shortcut links to apps, documents, and how-to information that users have flagged as useful and added to their customizable lists. Users can manage their lists or add more content to them via links at the bottom of the section. A customizable list of websites appears below the productivity column; a key icon indicates when single sign-on is available for the website.

One of the biggest successes on the site is the change to single sign-on. A key finding of Klick's initial research was that many employees used several web-based applications and tools in their daily work, and having to log in to each one individually was a huge annoyance. This problem was brought to the team's attention most notably when visiting an employee's desk, which was covered with Post It notes with usernames and passwords crossed out and rewritten, which was the only way she could keep track of all her separate logins.

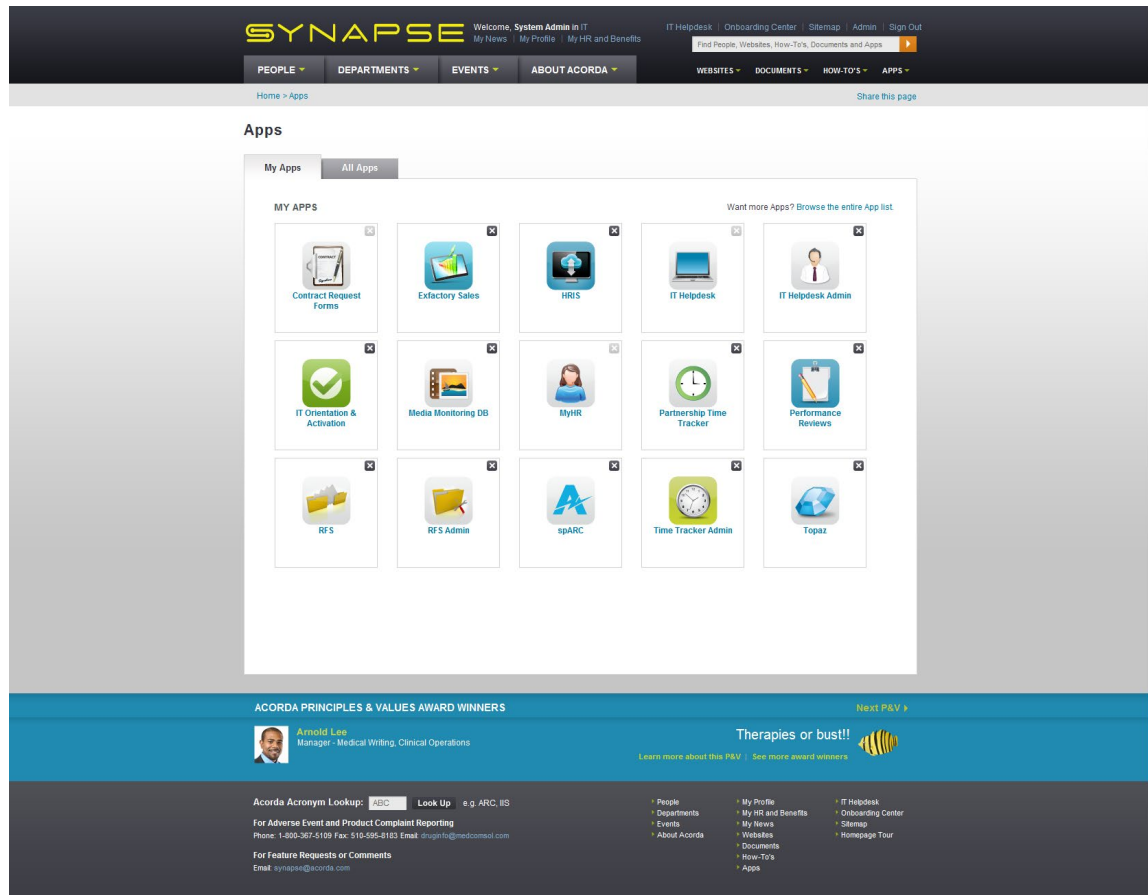
The Synapse site now offers single sign-on to many of the websites that employees use daily. These tools are indicated with a key icon in the list of websites on users' homepages, providing quick access to tools without them having to remember passwords. Users who access these tools or sites via Synapse can bypass login.

The middle of the page is focused on news items, which are updated frequently. All news items are dated and the content owner is listed as well. A Twitter feed from @AcordaNews also populates the site's main news area. Users can discuss or like news items; the number of likes is indicated next to each item.

The right column focuses on news from the CEO, important information for adverse-effects reporting and complaints, and event information. Photos accompany events information; this was a popular feature on the previous site, so the Klick team carried it through and put it on the new site's homepage.

The site lets employees see all web-based apps in one place. Users can “install” an app on their homepage using the *My Apps* functionality. These links open the tool in a new window or tab, with a thin strip across the top that quickly links users back to Synapse—as well as encourages them to add the app to *My Apps* if they haven’t already done so. Apps can be accessed via the customizable list on the user’s homepage (via the navigation bar’s *Apps* link) or on the *My Apps* page. The *My Apps* page shows all the apps the user has selected. The *All Apps* tab shows all available apps, based on permissions, with filters and sorting similar to the Apple App Store.

Users can remove most apps via an “X” on the screen. However, some apps, such as IT HelpDesk and HR information, can’t be removed.

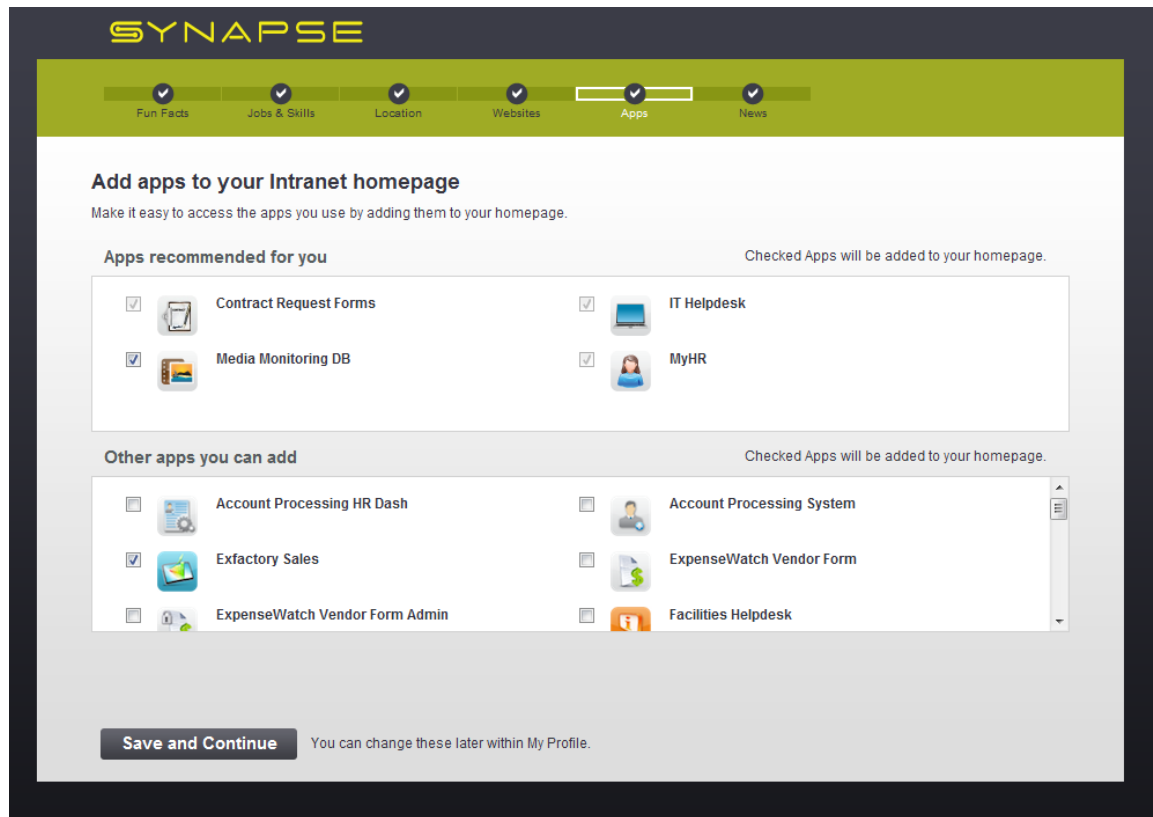


Pictured: Users can customize a list of apps to gain quick access to tools they commonly use.

Apps are added at first launch, through the initial set-up process. Some apps are recommended based on the user’s department affiliation, while others are used throughout the organization and are pre-populated. Additional available apps are listed as well. Users simply have to select an app to add it to their customized list.

Customization on intranets is generally most successful when its availability is obvious to the user and the customization is easy to do and has a clear benefit. Having users make these selections at first launch shows users that the process is simple, introduces them to the customization concept, and helps them through the process. Customization often fails because users either don’t realize it is possible or

don't take the time to do it, even if the time commitment is minimal. Including app selection in the initial set up helps mitigate those problems.



Pictured: The *My Apps* section, which appears on the homepage or is accessible via the site navigation, can be populated during the user's initial login to the site.

One successful site feature—which is intended to both support the company's culture and drive traffic to the site—is the *FaceGame*, which appears in the right column on the homepage. To create it, the team asked all employees to provide up to three pictures of themselves as kids or teens prior to the site's launch. These photographs are shown on the homepage, and employees can guess which colleague's picture is shown. Once they submit a guess, employees see the correct answer and a link to the employee's profile so they can learn more about that individual. This game has been very popular on the site, garnering more than 10,000 plays over three months—an average of 3.5 plays per user per day! A leader board shows the current *FaceGame* champion and also shows which photos fool the most people.

SYNAPSE Welcome, System Admin in IT
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IT Helpdesk | Onboarding Center | Sitemap | Admin | Sign Out

Find People, Websites, How-To's, Documents and Apps

PEOPLE | DEPARTMENTS | EVENTS | ABOUT ACORDA

WEBSITES | DOCUMENTS | HOW-TO'S | APPS

Home > FaceGame Scores

Share this page

Our People

- Acorda Directory
- Organization Chart
- Interactive Office Map
- FaceGame Scores

FaceGame Scores

Players

Show me: Most Answers Correct (%)

1		Scott Shapiro	99%
2		Farah Miro	97%
3		Ashley Strong	97%
4		Alice Fairmont	95%
5		Katherine Scott	94%
6		Tania Morris	93%
7		Fred Damotto	92%
8		Fanny Chan	91%
9		Diana Potter	90%
10		Ericson John	90%

Photographs

Show me: Most Incorrectly Answered (%)

1		38%	2		31%
3		30%	4		30%
5		28%	6		26%
7		23%	8		23%
9		22%	10		21%

ACORDA PRINCIPLES & VALUES AWARD WINNERS

Next P&V

Arnold Lee
Executive Director - IT, IT

We will find a way, or make one

Learn more about this P&V | See more award winners

Acorda Acronym Lookup: Look Up e.g. ARC, IB

For Adverse Event and Product Complaint Reporting
Phone: 1-800-367-5109 Fax: 510-595-5183 Email: druginfo@medcomail.com

For Feature Requests or Comments
Email: synapse@acorda.com

- People
- Departments
- Events
- About Acorda
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Pictured: The *FaceGame* engages employees, supports the company culture, and facilitates relationships as employees learn more about each other through this entertaining interface.

As with any intranet, search was a key component in this design. When doing initial research, the Klick team realized that the most common type of search was for people: locating someone to call or email right away. The team used Apache Solr, an open source solution, and implemented an auto-complete that streamlines this common task. Now, as users search for colleagues, search results appear in less than two seconds, giving employees quick access to the contact information they need. Results update almost instantaneously while users type their queries. Employees can then simply click on the phone number to dial that number on their desk phone via the company's voice over IP system or click the email address to send an email directly.

The click-to-dial feature is a big hit internally—for those that know it's there. Before launch, this feature was a showstopper in executive planning meetings. And those employees who have discovered or been shown the feature love it. However, because it's an unexpected feature, it has low discoverability—a problem that Klick realized only after launch. They plan to release new features with more fanfare in the future to try to increase employee awareness of them.

Because looking up colleagues is the primary use of search, people results are the first facet of results listed in the auto-complete window. The window shows the top

three results in each facet, with a link to see more results; this emphasizes the number of results found and indicates that more results are available.

Results are grouped by type (people, websites, documents, how to's, and apps), and a thick gray bar helps emphasize the different types of results. Users can click directly on a result or click to view the full lists of results.



Pictured: The auto-complete function in the site's search offers quick access to information. Employees can see colleagues' contact information without having to click through to a full employee profile.

Users can click through to full employee profiles, which also include the click-to-dial feature. Profiles are integrated with Microsoft Outlook, so employees' real-time appointment status (available, booked, tentatively booked, or away) can be shown in their profiles.

Profiles include information collected from users on their first use of the site. Tenure is also automatically calculated based on an HR database.

At first launch, employees are asked to provide profile information, including preferences for subscriptions and lists of websites and apps that help customize the homepage. The profiles also show location information. If they work in the office, employees are prompted to click on a map to indicate where they sit; if they work outside the office, they are asked to indicate the city and state in which they work.

Based on the employee's department, the site automatically recommends news, websites, and apps.

Questions are clearly marked as optional, and each has descriptive text to help the employee understand why it's relevant. For instance, a question about previous jobs is accompanied by the text, "Each Acordan brings a diverse wealth of experience to

the work they do. Share with your co-workers the experiences you've had that make you what you are today." Job-related skills are described as a way to "allow fellow Acordans to understand which projects may suit your needs," followed by a few examples. Employees are also reassured that they can "change these later within *My Profile*."

SYNAPSE

Fun Facts Jobs & Skills Location Websites Apps News

What previous jobs have you held? Optional

Each Acordan brings a diverse wealth of experience to the work they do. Share with your co-workers the experiences you've had that make you what you are today.

Teacher at Siemens

Account Director at a medical communications company

+ Add another job

? Tell other Acordans what your job history is. Try to only mention those that are relevant to your current position.

What job-related skills do you possess? Optional

Great at math

+ Add another skill

? This information is used to allow fellow Acordans to understand which projects may suit your skills.

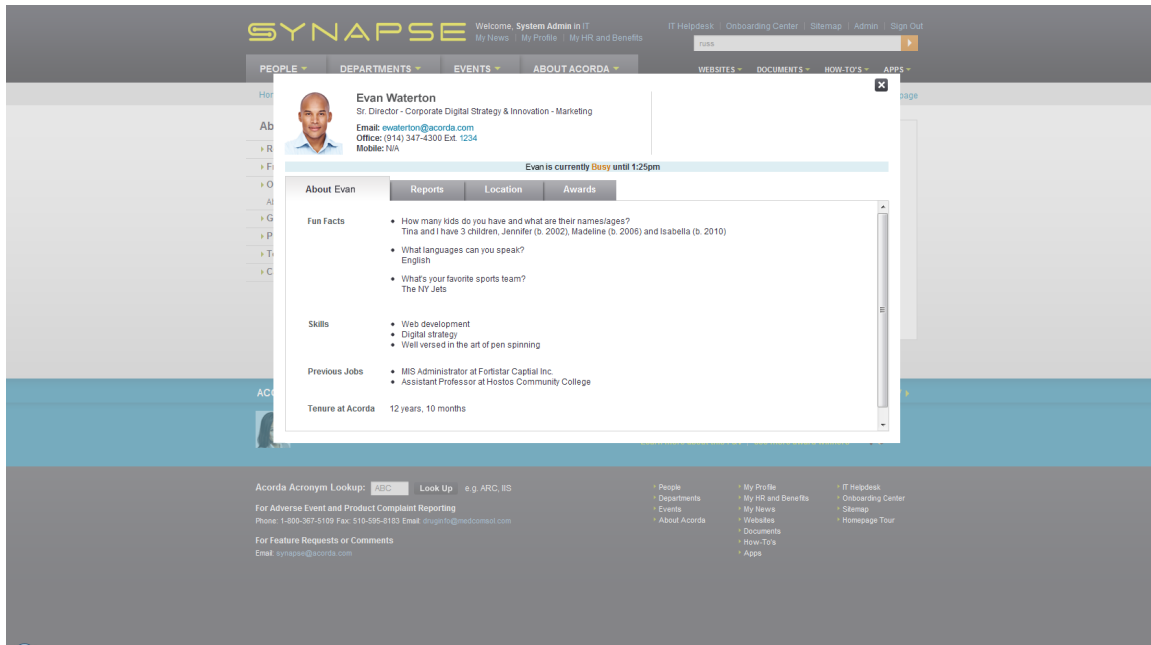
Some examples:

- Advanced Microsoft PowerPoint skills
- Great at math
- Accomplished Medical Writer

Save and Continue You can change these later within My Profile.

Pictured: At first launch, employees are prompted to answer a few questions about themselves to help populate their user profiles.

Because much of the user profile information is self-reported, it's important that employees keep the information up-to-date. Acorda and Klick are working together on ideas that will make profiles more robust without relying on busy employees to take the initiative, including to let employees: nominate each other for performance awards; tag and display photos on profile pages; and show employee stats on profile pages, such as how many comments they received or what content they liked.



Pictured: User profiles include information employees submit upon first use of the site, as well as some auto-populated information.

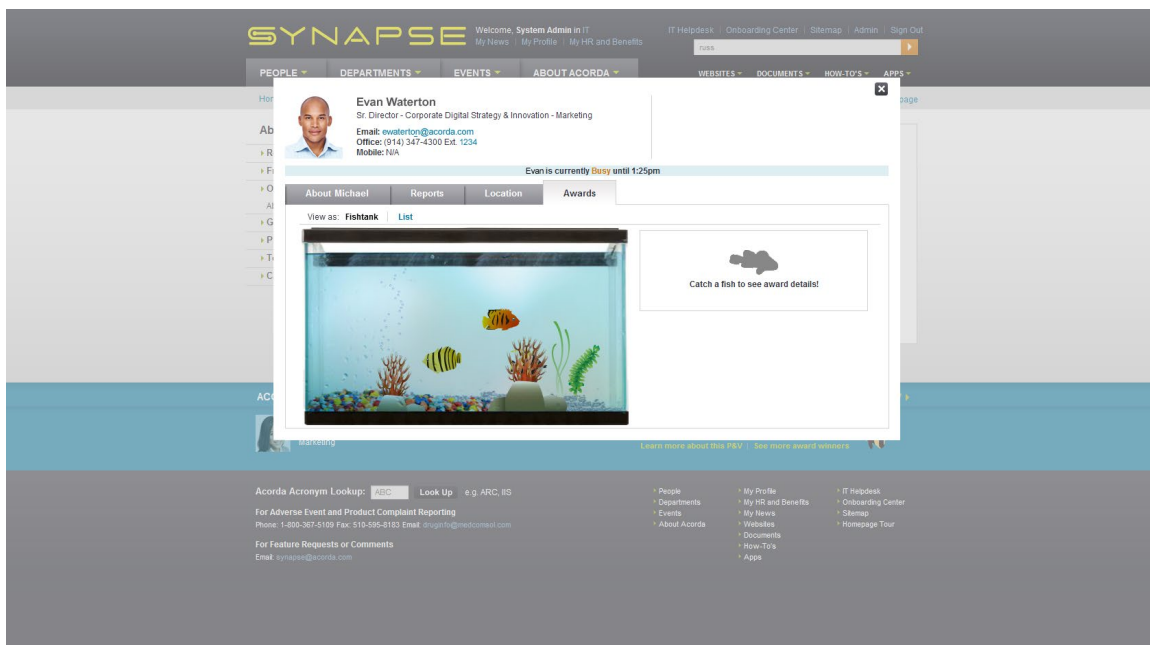
The other key user profile feature is the user's fish tank. The fish tank shows which Principles & Values (P&V) awards the employee has earned. P&V awards are given approximately biannually; receiving one is a rare, honored accomplishment. The fish tank lets employees display such awards, and is part of the corporate culture.

At each new employee orientation, CEO Ron Cohen tells the "Fresh Fish Told Here" story, which he had read and remembered from a childhood book of Jewish folklore. The moral of the story is: "People don't care what you say or write about yourself. They only know what you do and who you are. At the bottom of the list of principles and values we will write 'Fresh Fish Sold Here'—so that we will always remember that this list is only words, unless our actions give them life."

This story is now part of Acorda's legend, making fish a meaningful symbol at the company. At orientation, every new employee receives a glass fish, along with the nine P&Vs to live by. The P&V awards also have fish associated with them, with each principle or value mapping to a fish species. So, when employees receive a reward, it is rendered as a fish in their fish tank. Clicking on a fish displays the award details and the related principle or value.

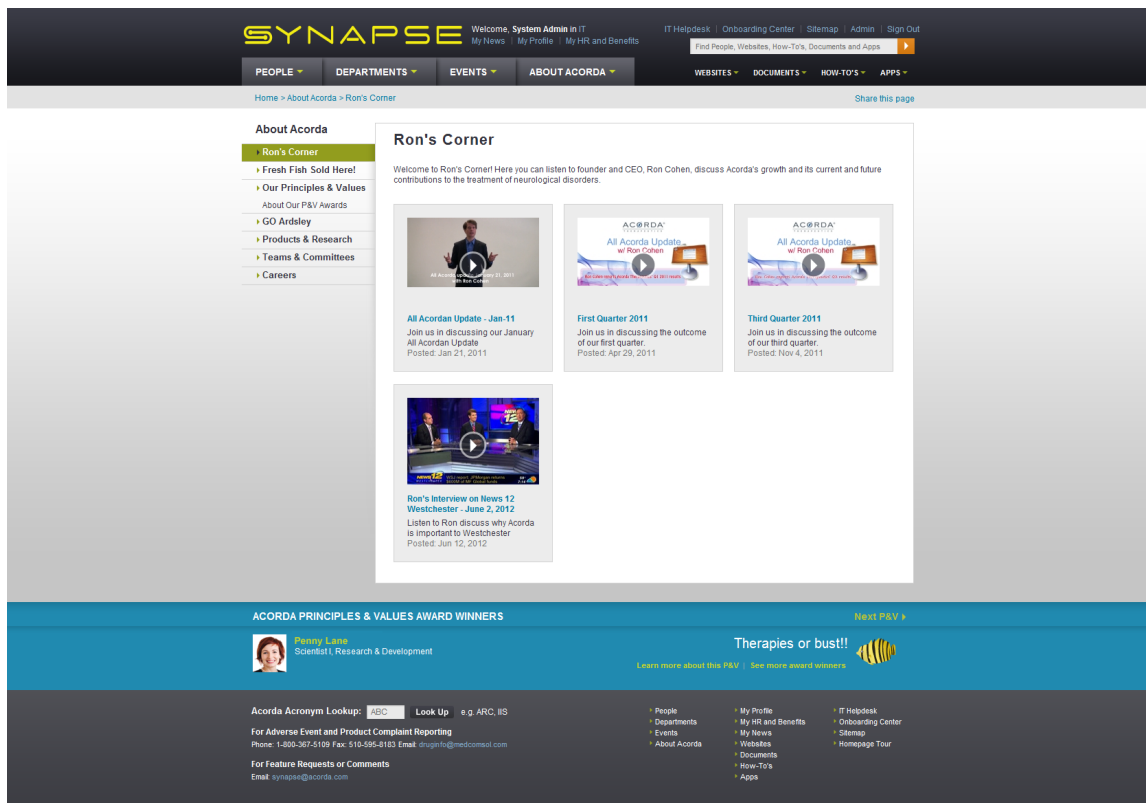


Pictured: New employees receive a glass fish at orientation.



Pictured: User profile fish tanks feature fish representing any P&V awards they have won. "Catching" or clicking on a fish displays information about the awards.

Clearly, Cohen is a huge presence at Acorda, and Klick's research showed that he is indeed a big motivator within the company. However, as the company succeeds and therefore grows, employees have less exposure to him than in the past. To continue to make his inspiration felt within the growing company, Synapse offers *Ron's Corner*, an intranet section that features quarterly videos of the CEO addressing employees and talking about company performance and expressing his gratitude for employees. The latest video is always featured on the homepage. The site also features a video of Cohen telling the fresh fish story.



Pictured: Video messages in *Ron's Corner* help employees feel more connected to the CEO, who is a strong motivator within the company.

Acorda also moved some critical work assets to the intranet. These documents previously lived on a shared network drive, and employees had complained that finding documents they needed there was difficult. Now, such files are organized under *Documents* and *How-to's* based on department. Documents now have permissions-based management and display their owner. Users can search to easily find and view documents by department, or to see all documents, regardless of department.

Employees can also comment on documents, but this feature is rarely used. The team realized that social features, such as "liking" or commenting on an item, didn't work particularly well for work-related documents. They therefore removed the "like" button but kept the commenting function. So far, however, comments are not automatically forwarded to document owners; as a result, comments that raise questions aren't necessarily addressed by the document owner. This is an area the team plans to revise in the next iteration.

SYNAPSE

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[WEBSITES](#) [DOCUMENTS](#) [HOW-TO'S](#) [APPS](#)

[Home](#) > [Documents](#)

Documents

My Documents

All Documents

Top Documents

Create New Document

ALL DOCUMENTS

Narrow by Department:
All Departments (359)

Narrow by Category:
Any Category (359)
Advisory Committee Meeting Videos (1)
Artsley (2)
Benefits (45)
Certification (2)
Disability (3)
Flexible Spending Account (2)
Form (46)
FSA (5)
Guidance (8)
Guidelines (12)
Handbook (1)
Human Resources (1)
IRS (1)
List (6)
Long Term Care (10)
Long Term Disability (1)
Medical Plan (21)
Policy (7)
QUIMAS (8)
Report (11)
Schedule (1)
Slides (7)
SOP (31)
Template (14)
Timelines (1)
Vision (1)
Wellness (4)
Uncategorized (161)

Filter by Document Name: [Reset](#)
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Document Name, Location	Downloads by All	Comments	Last Updated	
Wellness Program Description Human Resources > Wellness	272	0	Jun 7, 2012	Add to My Documents
Associate Handbook Human Resources > Administrative	214	1	Oct 19, 2011	Add to My Documents
Holiday Schedule Human Resources > Administrative	194	0	Oct 19, 2011	Add to My Documents
Wellness Program Reimbursement Form Human Resources > Wellness	134	0	Jun 7, 2012	Add to My Documents
GO Artsley Lunch & Learn Presentation - April 15th, 2012 Facilities > Artsley	106	0	Apr 19, 2012	Add to My Documents
Commercial Coverage Grid 15March2012 Managed Markets > Coverage Grids > Sales	93	1	Mar 15, 2012	Add to My Documents
Travel and Expense 2012 Finance > Administrative	91	0	Jul 5, 2012	Add to My Documents
Cigna - Summary of Benefits and Vision Rider Human Resources > Medical Plan	79	0	Mar 23, 2012	Add to My Documents
Wellness Program Launch Presentation Human Resources > Wellness	74	0	Mar 8, 2012	Add to My Documents
ACORDA letterhead - Artsley Business Development > Administrative	72	0	Jul 3, 2012	Already in My Documents
Prior Notification of Security Transaction Finance > HR Forms	59	0	Oct 19, 2011	Add to My Documents
Direct Deposit Form Human Resources > Administrative	53	0	Jan 25, 2012	Add to My Documents
FAQ's 5.17.12 Facilities > Artsley	53	0	May 17, 2012	Add to My Documents
Commercial Coverage Grid - Team Version Managed Markets > Coverage Grids > Team	52	0	Mar 15, 2012	Add to My Documents
W-4 Form Human Resources > IRS	43	0	Jul 12, 2012	Add to My Documents
Powerpoint Template - Blue Communications > Administrative	39	0	Oct 19, 2011	Add to My Documents
Formulary Access File Managed Markets > Access Files	35	0	Mar 2, 2012	Add to My Documents
Acorda Code of Ethics Compliance > Compliance	33	0	Dec 20, 2011	Add to My Documents
Rivertown Enterprise covers our Ribbon Cutting Communications > News Articles	33	0	Aug 10, 2012	Add to My Documents
Cigna - Wellness - My Health Assessment Member FAQ Human Resources > Wellness	32	0	Mar 28, 2012	Add to My Documents

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ACORDA PRINCIPLES & VALUES AWARD WINNERS

Arnold Lee
Assistant Director - Human Resources, Human Resources

We will find a way, or make one

[Learn more about this P&V](#) [See more award winners](#)

Acorda Acronym Lookup: Look Up e.g. ARC, BS
For Adverse Event and Product Complaint Reporting
Phone: 1-800-367-5109 Fax: 510-595-8183 Email: druginfo@medconform.com
For Feature Requests or Comments
Email: synapse@acorda.com

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- My Profile
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- My News
- Websites
- Documents
- How-To's
- Apps

- IT Helpdesk
- Onboarding Center
- Sitemap
- Homepage Tour

Pictured: Users can view documents by department or see all available documents. Facets on the side of the page help narrow options. The date of the document's last update is always listed.

Half of the Acorda workforce is in the field, and future plans include mobile apps. Sales reps currently rely on third-party apps to do their scheduling, promotional

170

INFO@NNGROUP.COM

Acorda Therapeutics, Inc. (2013)

material orders, and expense reports. Although the current intranet can be accessed via mobile devices, it's not optimized for mobile. For instance, some site content uses Flash, which doesn't work on iOS. However, because sales reps use company-issued iPads, apps built specifically for them might be included in the future.

The Klick team has done an admirable job moving from an outdated intranet site to a gracefully integrated tool, built with the end user in mind.

BACKGROUND

Following FDA approval for its first Multiple Sclerosis (MS) therapy—Ampyra—in 2010, Acorda found itself overwhelmed by the growing needs of an ever-expanding audience: patients, healthcare professionals, corporate partners, and external stakeholders including the FDA and the SEC. Given their similarities in size, growth rate, and culture, Acorda asked Klick for guidance on how to manage its explosive growth. In response, Klick demonstrated the capabilities of its own intranet—Genome—to Acorda executives. After seeing the potential benefits of a custom-built intranet, Acorda and Klick initiated an in-depth discovery process to uncover the specific business needs required to ensure success in both the short- and long-term.

To guarantee that the intranet's design met those business needs, the Klick User Experience team conducted onsite visits and contextual inquiries, culminating in 10 in-person executive-level interviews and 35 in-person departmental interviews, including two ride-alongs with Acorda sales representatives in the field. The research gathered during the interview process provided critical insight into the day-to-day issues that intranet technology could address.

Interview findings were compiled, analyzed, prioritized, and augmented with intranet best practices. The team then proposed functionality to meet the business objectives and address the most common interview findings.

The phase I launch of Synapse was intended to accomplish three key goals:

- **Improve communication** flow across the organization
- **Preserve** the unique Acorda **culture**
- **Ensure adoption** of Synapse

The long-term objectives for Synapse are more far-reaching and have greater business impact. The ultimate vision for Synapse is to improve Acordans' productivity by offering increased automation and interactive tools to promote positive behavior (and process) changes across the organization. Accomplishing these goals means developing a customized intranet that can both surface project-based data and reports to Acordans and provide Acorda's management team with rich analytics to drive decision-making.

Adoption Challenges

To ensure a successful launch, Klick had to overcome a few significant hurdles. For instance, during the interview process, one of the key findings that emerged was that Acordans are extremely busy and set in their established workflows. The team was concerned that the intranet's success would be compromised unless there was an awareness or marketing campaign that clearly spelled out the intranet's benefits. Klick thus planned a significant pre-launch hype campaign that included posters to

support two key pre-launch efforts: the “What’s In a Name?” campaign promoted the Name-the-Intranet contest, awarding an Apple iPad to the Acordan with the winning submission; and the “The People You Know” campaign teased the benefits of Synapse features prior to launch.

“The creative approach for ‘What’s In a Name?’ was to draw immediate attention from every single person walking the halls at Acorda,” says Yamini Ramamoorthy, Creative Director. “We wanted people to stop in their tracks, take a look, and start talking to their colleagues about the game, and inspire and excite them. The ‘Name Game’ posters perfectly tied into Acorda’s culture.”

“The ‘People You Know’ posters employed professional photography of actual Acordans in exaggerated poses to illustrate the benefits of specific features being built into the initial Synapse launch,” he says. “The shock value of seeing recognizable Acordans—including CEO Dr. Ron Cohen—in such humorous poses generated a lot of buzz about Synapse and generated a significant amount of excitement.”

WHAT'S IN A NAME?



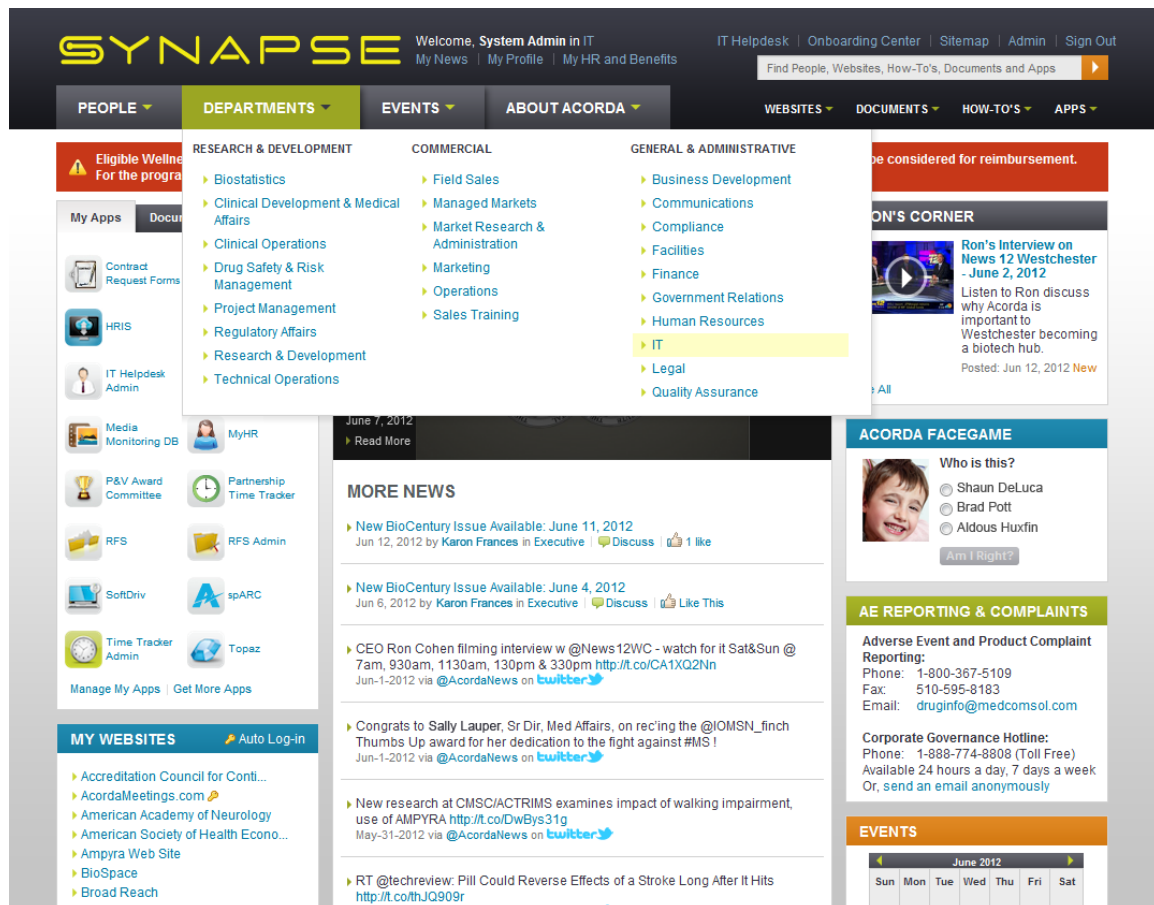
EVERYTHING!

We need your help to name our new Acorda Intranet.
Visit NameGame.acorda.com to submit your ideas
and you could win an iPad 2!

ACORDA
THERAPEUTICS

Pictured: The "What's In a Name?" posters leverage established brands to lend visual stopping power.

The pre-launch tactics ensured that momentum peaked as Synapse launched. A company-wide lunch-and-learn event celebrated launch day and included a complete intranet walkthrough, a takeaway pamphlet with tips and tricks, a Synapse-branded “bobble” water bottle, and the announcement of the Name Game winner. The winning name, Synapse, had a neurological reference that resonated strongly with this biotech company’s employees, and the posters were seen as instrumental in engaging employees and driving intense excitement about the intranet’s launch.



Pictured: All main nav nodes utilize mega menus. The *Department* drop-down uses Acorda-defined department groupings. Here, the user’s department is highlighted.

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ABOUT HUMAN RESOURCES

The Human Resources department

- Serves as a strategic HR business partner and adviser to management
- Mentors, coaches and counsels employees on a wide range of HR issues (e.g., career development, benefits questions)
- Builds a high-performance culture to attract and retain top talent
- Designs, develops and implements compensation and benefits programs
- Develops and executes policies and procedures, such as paid time off policy, reference checking procedures, benefits enrollment and the Human Resources Information System (HRIS)

HUMAN RESOURCES NEWS

Create News Item

Congratulatio...

Sep 4, 2012 by Louise Zimmerman in Human Resources

6 comments

10 likes

Burke & Ron Cohen in Westchester Magazine

Aug 28, 2012 by Jesse Finn in Communications

Discuss

Like This

Congratulatio...

Aug 13, 2012 by Oktan Taylorman in Human Resources

Discuss

3 likes

[See All Human Resources News](#)

[Add to My News](#)

TOP DOCUMENTS

Create Document

Name, Location		
Wellness Program Description	272	0
Human Resources > Wellness		
Associate Handbook	214	1
Human Resources > Administrative		
Holiday Schedule	154	0
Human Resources > Administrative		

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TOP HOW-TO'S

Create How-To

Name, Location		
Get Reimbursed for Wellness Expenses	100	0
Human Resources > Wellness		
How to change an approved or pending Paid Time Off (PTO) day	79	0
Human Resources > PTO		
Completing a Rollover into Acorda's 401(k) Plan	33	0
Human Resources > 401(k)		

[See All Human Resources How-To's](#)

CONTACTS

Edit Contacts

Compensation, Benefits/Disability/FMLA:

Shane Doyle

Assistant Director - Human Resources

shdoyle@acorda.com

Ext. 1234 | Map

Staffing & Company Events:

Tasha Ackerman

Sr. Manager - Human Resources

tackerman@acorda.com

Ext. 1234 | Map

Staffing:

Martin Trapper

Sr. Staffing & Development Specialist

mtrapper@acorda.com

Ext. 1234 | Map

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EVENTS

Create Event

Health Fair

Thu Sep 13, 2012

401(k) Deferral Election Change Period

Sun Sep 16, 2012

> Sun Sep 30, 2012

Softball Game

Thu Oct 18, 2012

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ACORDA PRINCIPLES & VALUES AWARD WINNERS

Next P&V

Penny Lane

Director - Market Research & Administration, Market Research & Administration

Teamwork... uh, huh!

[Learn more about this P&V](#) | [See more award winners](#)

Acorda Acronym Lookup: Look Up e.g. ARC, BS

For Adverse Event and Product Complaint Reporting
Phone: 1-800-367-5109 Fax: 510-595-6163 Email: druginfo@medcombest.com

For Feature Requests or Comments
Email: synapse@acorda.com

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[Sitemap](#)

[Homepage Tour](#)

Pictured: Each department is represented by a departmental homepage. It contains a description, a targeted news feed, a list of contacts broken down by topic area, and widgets representing the department's top *Documents*, *How-to's*, and *Events*.

SYNAPSE

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[Fresh Fish Sold Here!](#)
[Our Principles & Values](#)
[About Our P&V Awards](#)
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Our Principles & Values

[Learn more about P&V awards](#)

Our Principle and Values (P&V's) came about organically. The initial set of values was proposed by the small band of Acordans who came to Hawthorne with the company in 1998, and it has been updated and amended as each new generation of Acordans has made their own contributions to it. The P&V's were established notwithstanding Ron's reservations that what you say about yourself doesn't matter nearly as much as what you actually do. To ensure that this message lived on, "Fresh Fish Sold Here" has been appended ever since to all renderings of the P&V's. In retrospect, Ron confesses that the rest of the team had it right back in 1998. The P&V's have helped us establish a vibrant culture at Acorda, where communication, teamwork, integrity, creativity, life balance and a passion for advancing the frontiers of medicine inform our daily lives.

Here you can learn more about our P&V's and how they guide the way we work and interact with our teammates at Acorda. You can also nominate your fellow Acordans for awards that recognize their exceptional representation of our P&V's.

 Communication... Communication... Communication...	 We tell it like it is
 We don't shoot (or torture) the messenger	 We work our butts off (but we have fun)
 Integrity... we're full of it	 We will find a way, or make one
 We don't count beans, we make beans count	 Teamwork... uh, huh!



Therapies or bust!

FRESH FISH SOLD HERE

What does this mean?

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Shane Fink
Assistant Director - Legal Affairs, Legal

Teamwork... uh, huh!

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Acorda Acronym Lookup: [Look Up](#) e.g. ARC, BS

For Adverse Event and Product Complaint Reporting
Phone: 1-800-367-5109 Fax: 510-595-5105 Email: druginfo@acordacomp.com

For Feature Requests or Comments
Email: synapse@acorda.com

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Pictured: This page lists the Acorda Principles and Values (P&V), with links to details of each. P&V Awards are granted when employees exemplify a particular principle or value in an outstanding way, and the fish representing that principle or value then appears in the person's fish tank.

INTRANET TEAM



Pictured: The Klick Health Synapse team (from left to right): Peter Cheung, Heeyol Lee, Rob Brander, Michael Hambor, Cynthia Dahl, Sivasankaran Uthayasankaran, Mark Hadfield, Michael Melnick, Leerom Segal, Birgit Cole, Glen Webster, Neville Thomas, Armando Narvaez, Ari Schaefer, Mark Donaldson, and Andrew Middlemas.

GOVERNANCE

Ownership

A Synapse Governance Committee recommends and approves functional changes or enhancements to Synapse and manages the site. The committee is a group of seven Acordans with representation from across a range of departments and organizational levels. The Director of Business Development handles day-to-day project-related communications and site management. Content updates are handled by each department, which has a nominated representative who is responsible for administering Synapse content.

The Synapse Governance Committee was assembled only recently, so its impact on the site is yet to be determined. Prior to this model, Kyle Kuhn, the Associate Director of Business Development, filtered and prioritized all Synapse-related requests that arrived in his inbox from the various departments.

SYNAPSE TEAM RESPONSIBILITIES	
Role	Responsibilities
Departmental Administrator (Acorda)	• Manage day-to-day updates of departmental content on Synapse, including news, documents, how-tos, events, and contacts • Surface high-priority Synapse functionality enhancement requests to the Synapse Governance Committee • Review solutions proposed by Klick to meet the above requests
Synapse Governance Committee (Acorda)	• Review and prioritize Synapse functionality enhancement requests from departments and committees/teams • Review and approve proposed Klick-provided solutions to the above requests • Review and approve short- and long-term budgets and timelines
Account Director and Project Manager (Klick)	• Work with the Synapse Governance Committee to track performance and consolidate feedback and lessons learned • Work with Klick's internal teams to develop solutions to enhance Synapse's on-going performance
User Experience Lead (Klick)	• Evaluate feasibility and understand business problem being solved by Synapse enhancement requests submitted by the Synapse Governance Committee • Ideate and design (wireframe) appropriate solutions to meet the enhancement requestor's needs • Review and ensure appropriate implementation of enhancements
Design, Development and QA Teams (Klick)	• Help establish feasibility and scope of solutions proposed by User Experience Lead • Implement solutions on time and budget, in collaboration with Acorda IT

USERS

Synapse services all Acorda employees, although only half the company is physically located at the head office in Ardsley, New York.

Because Acorda deals with the complexities of developing, distributing, and marketing an FDA-approved drug, the list of departments that use Synapse is long and varied and grouped according to three categories:

- **Research and Development** (e.g., Clinical Affairs, Regulatory, and Technical Operations)
- **Commercial** (e.g., Field Sales, Managed Markets, and Marketing)
- **General and Administrative** (e.g., Finance, HR, IT, and Legal)

Although Synapse offers departmental landing pages, the site IA and search functionality were purposely designed to be department-agnostic—that is, users can find documents and other assets on Synapse without knowing which department “owns” that asset.

At phase I launch, all department pages were identical in their functionality and layout. However, as enhancements are continually rolled out, there will be an opportunity to customize each department landing page to meet Acorda’s growing needs.

SYNAPSE

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[IT Helpdesk](#) | [Onboarding Center](#) | [Sitemap](#) | [Admin](#) | [Sign Out](#)

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[DEPARTMENTS](#)

[EVENTS](#)

[ABOUT ACORDA](#)

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[HOW-TO'S](#)

[APPS](#)

[Home](#) > [Organizational Chart](#)

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Our People

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[Interactive Office Map](#)

[FaceGame Scores](#)

Organizational Chart

[Download contact sheet](#)

Find an Acordan:
Reset

Rose Cohen
President & CEO

Thomas Tilley
Chief Scientific Officer

Igor Chapman
Chief Financial Officer

Samuel Frankman
Executive Director - Technical Operations

Teeny Dickthorn
Vice President - Finance

Angie Sheen
Director - Accounting

Francine Laney
Supervisor - Accounting

Lela Songman
Accounting Manager

Arnesto Silva

Shania Farrah
Accountant

Queenie Tan
Sr. Stock Plan Administrator

Mikko Thermalatte
Executive Director - IT

Louisa Postal
Director - Facilities Management & Purchasing

Tina Miranda
Administrative Assistant - Finance

Helena Belopolsky
Sr. Vice President - Human Resources

Shane Fink
Chief Medical Officer

Santiago Cortez
Chief, Strategic Development & General Counsel

Sookie Nightman
Executive Vice President - Commercial Development

Rothman Khan
Vice President - Business Development

Allisa Patel
Sr. Vice President - Communications

Ashley Montgomery
Sr. Executive Assistant

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Arnold Lee
Director - Accounting, Finance

Teamwork... uh, huh!

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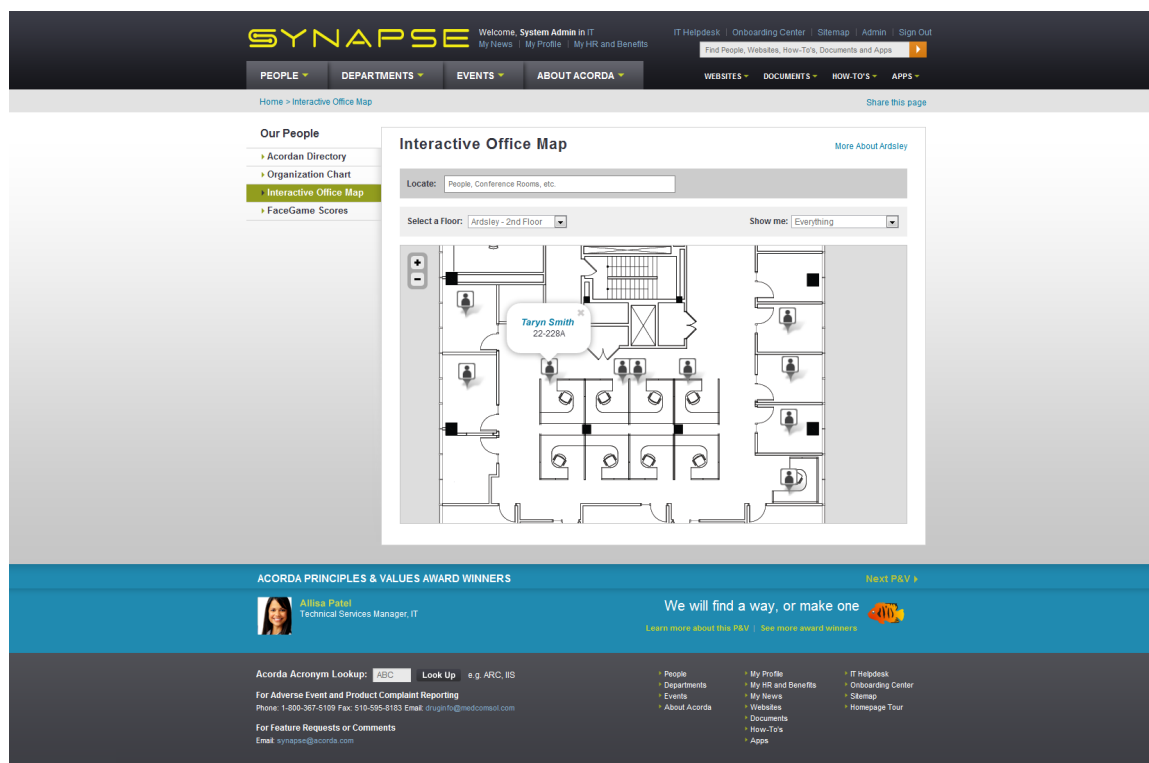
[Homepage Tour](#)

Pictured: The site's organization chart uses a collapsible/expandable tree view. Clicking on a name displays that user's profile in a dialog box. The search box's look-ahead functionality lets users easily find the person they are looking for. Once a user chooses a person, the org chart auto-expands the tree and the located Acordan node is brought into focus.

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INFO@NNGROUP.COM

Acorda Therapeutics, Inc. (2013)



Pictured: This interactive office map was made available to coincide with Acorda's relocation to a new facility. Using it lets users find other Acordans, meeting rooms, and shared spaces with ease.

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	http://synapse.acorda.com
Default Status	Synapse is set as each user's homepage, but users can change this setting if they wish. Also, the site is set as the homepage in each user's browser. Users click the home button to reach Synapse.
Remote Access	Users can access Synapse outside of their VPN. Doing so brings up a login screen that is bypassed if the user is already logged into the VPN.

DESIGN PROCESS AND USABILITY WORK

Design Approach

As mentioned earlier, the Klick team initiated the design project with a series of stakeholder interviews, field visits, and user research. Klick had previously delivered successful digital project work on other Acorda brand initiatives and had established a reputation for high-quality work. Acorda brought Klick in to work on various aspects of the intranet project, including all of the discovery, design, implementation, and testing services, in collaboration with Acorda Business Development and IT.

The selection of usability methods for the Synapse project was largely based on two criteria—time and usefulness—and included the following:

- **Attending new employee orientation:** To immerse itself in the Acorda environment and understand what makes Acorda so unique, Klick sent three representatives to attend new employee orientation onsite at Acorda. This intensive two-day session (which was attended by 15 new Acordans) included:
 - A brief history of Acorda
 - An overview of Acorda's structure and systems
 - A presentation by CEO Cohen, including an entertaining explanation of the Acorda P&Vs
 - A presentation by each department head introducing his or her respective department, what they do, and how to work with them
 - An overview of employee logistics and benefits (insurance, stock options, etc.)

New employee orientation not only gave Klick team members a wealth of information about how Acorda operates, but also let them mingle among the (soon-to-be) Synapse user base. This gave them a unique opportunity to understand the challenges that arise when on-boarding new hires and the questions that are commonly asked during the process.

- **In person interviews:** As a follow-up to the executive-level interviews conducted early in the project, Klick interviewed more than 35 Acordans across multiple departments and from different organizational levels. Common themes that emerged from the interviews were later addressed, wherever possible, by specific intranet functionality.

The team used an interview guide to maintain consistency from one interview to the next. “The interview guide was critical in order to establish interview consistency, ensure a simple analysis process, and prevent the interviews from getting too off-track,” says Michael Melnick, Director, User Experience. “What I found tremendously useful was asking Acordans not only about their pain points or how we could make their jobs easier, but also the positive aspects of their work: what motivates and inspires them, and why they love working at Acorda.” These findings greatly impacted the intranet design and were leveraged to help the team create features on the site, such as the *Awards Fish Tank* and *Acorda FaceGame*.

These interviews, together with field research (explained below) yielded the richest findings and had the greatest impact on the Synapse design.

- **Field research/contextual inquiries:** More than half of Acorda’s workforce works in the field, so gaining an understanding of the needs of those users outside the home office was crucial for building an effective intranet. To better understand that world, Klick conducted ride-alongs with Acorda sales representatives. The UX team members acted as silent observers as Acorda sales reps traveled to neurologists’ offices to “detail” the product. This experience gave the Klick UX team valuable insight into how the intranet could be designed to meet the unique needs of these workers.

For example, to perform many tasks associated with their jobs, sales reps rely on third-party websites—far more so than folks working at headquarters. They use various partner websites to schedule seminars with neurologists, order promotional material, and submit expenses. “During a field ride along, one of the Acorda representatives griped about how many passwords she had to remember because all the Acorda partner websites required individual logins,” says Melnick.

“I recall getting a tour of one of the reps’ workspaces,” says Mark Hadfield, Senior Vice President, Program Delivery. “Her desk and computer monitor were littered with dozens of Post-It notes that contained scribbled or crossed out usernames and passwords. She complained how each website she was required to work with had different password requirements and reset schedules. This kind of observation wouldn’t have been possible unless we were physically present in the rep’s home office to prompt about the Post-It notes.”

This particular finding gave rise to the site’s single sign-on feature. Klick identified the most commonly accessed Acorda partner websites and worked with them to allow single sign-on directly through Synapse. This means that users accessing partner websites are seamlessly authenticated (behind the scenes) if they’re already signed in to Synapse; no need to login separately. This convenience feature remains one of the Synapse platform’s most useful benefits.

- **Checking SharePoint usage stats:** Prior to the availability of Synapse, Acorda used a SharePoint-based intranet to share files and post news alerts. Reviewing the usage stats of the Portal proved helpful for the design team, and this data helped corroborate findings that were uncovered during the interview process. Klick team members looked for usage trends to avoid leaving popular, well-used features on the cutting room floor when they created Synapse. For example, during the user interviews, several Acordans said that one of the reasons they visited the old intranet was to look at the event photo albums. The site statistics backed up this claim and revealed that other areas, such as news and announcements, were also getting a lot of traffic. Personal news items, such as birth and wedding announcements, were especially popular. Given their popularity, photo albums and news items were enhanced in the redesign and included in the Phase I feature set for the new site.
- **Guerilla-style usability testing:** Throughout the wireframing phase, Klick UX team members found great value in conducting ad hoc, five-minute “guerilla” usability tests to validate various aspects of the interface and IA on the fly. With limited time to devote to these sessions, they were, as Melnick describes, “a lesson in crude simplicity.” A typical session was conducted as follows:
 - Print a wireframe or series of wireframes.
 - Ambush a colleague (not involved in the Synapse project) who agrees to participate in a five-minute test.
 - A UX designer (acting as facilitator) explains the testing scenario to the participant (e.g., “Let’s pretend you wanted to find a document on the intranet...”)
 - The facilitator lets the subject explore the page and asks the subject to explain what they would do in context of the scenario, prompting them to think aloud.
 - In the cases where major design or architecture decisions needed to be made, some tests were conducted with three or four subjects.

These tiny tests yielded big results. Despite the informal approach, the tests provided key usability-based findings and allowed the UX team to proceed with key design decisions with confidence of knowing how they would play out in the real world. “The costs of conducting these simplistic tests were far outweighed by the benefits provided,” says Melnick.

- **Research and visioning:** Throughout the design process, Klick scoured countless articles and research publications from both online and offline sources for design inspiration (including the 2011 Nielsen Norman Group Intranet Design Annual) to both augment the team’s extensive knowledge and experience and to gain exposure to current best practices.

Also, prior to doing any discovery work, Klick assembled a mock-up of what an Acorda intranet homepage might look like so that Acorda executives could visualize the potential.



Pictured: The homepage as envisioned before any usability or research methods were carried out. Note: on this screen, the site is called "Acordinator," which was the working title before Name Game was completed.

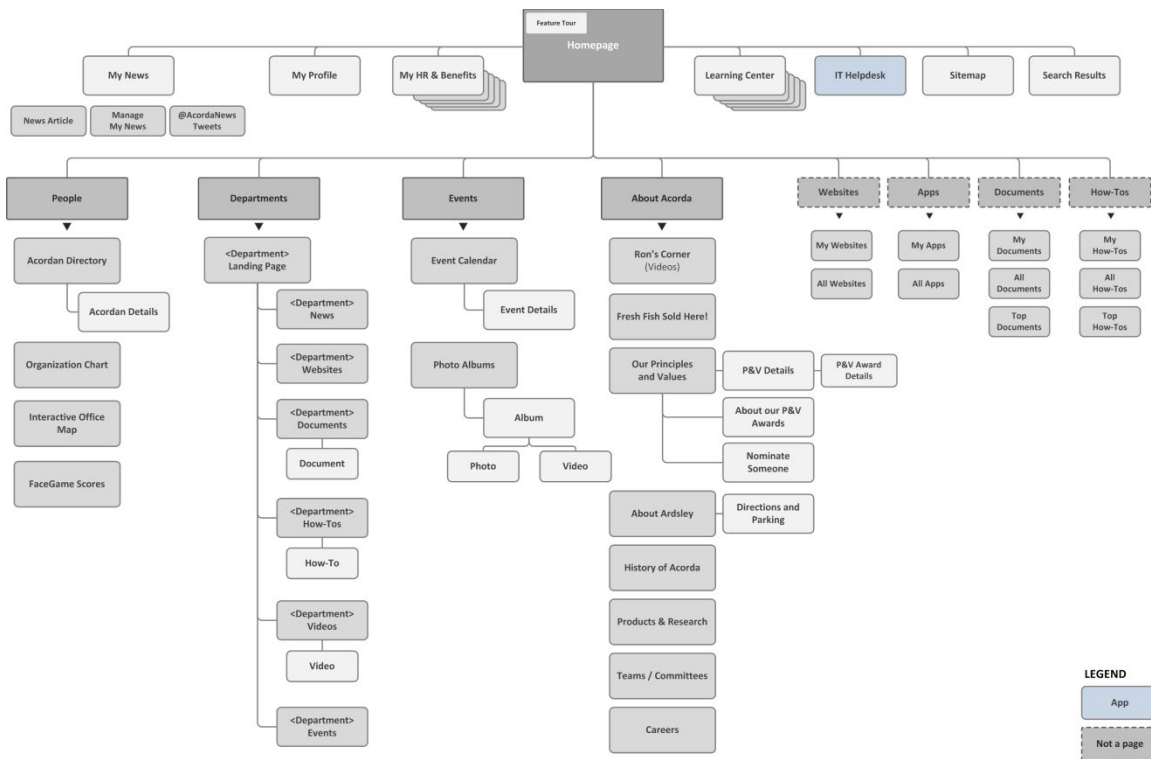


Pictured: A department landing page as envisioned before any usability or research methods were carried out.

This mix of research methods was a good investment for the Klick team. “User research played a huge role in the shape of the final product,” says Dave Lougheed, Vice President, User Experience.

“We initially proposed concepts that were grounded in best practices but weren’t specifically tailored for Acorda. As we gathered real user insight, it became clear to us that we needed to rethink some of our base assumptions,” he says. “The final product now clearly reflects the daily reality of a growing company with an important mission in healthcare. I couldn’t be more pleased with the results.”

Klick is still actively involved in a consultative role when Acorda proposes new features. Klick also provides ongoing strategic direction and counsel on how best to leverage the Synapse platform to meet the company’s growing and ever-changing needs.



Pictured: The Synapse information architecture.

TIMELINE

INTRANET TIMELINE	
Milestone Date	Milestone Description
2003 (approximate)	First Acorda intranet launched (SharePoint-based Portal)
August 2010	Klick and Acorda meet to discuss ideas for managing growth and culture
September 2010	- Acorda agrees to intranet redesign - Klick conducts executive interviews
October 2010	Klick conducts departmental interviews and field ride-alongs
November 2010	- Interview findings are analyzed and presented - Prioritized features and functionality list is created and approved
December 2010–January 2011	Initial IA, wireframes, and creative concepts are completed
February 2011	IA, wireframes, and creative concepts are presented and approved by the Acorda executive team
February–May 2011	- Wireframes and page-level creative designs completed with periodic check-ins and approvals - Web and application development initiated - Content creation initiated with department representatives
June–August 2011	- Web and application development completed - Content creation completed
September 2011	Quality assurance testing is initiated and completed
October 2011	- User acceptance testing conducted at Acorda - Pre-launch adoption plan begins
November 2011	Final tweaks, fixes, and updates
December 2011	Synapse launch

CONTENT AND CONTENT CONTRIBUTORS

Klick's proprietary content management system, SmartSite, is both a development platform and a traditional CMS. As a result, Klick was able to leverage an established codebase to begin Synapse's development and to deliver it on schedule, even with tight timelines. Although customized administration tools were built for Synapse content owners, SmartSite lets Klick quickly update content throughout Synapse, including areas that don't have an administration tool.

The form-based administration tools use several methods to ensure high-quality content:

- **Contextual help** is provided inline, right beside fields that are ambiguous or esoteric.
- **Smart defaults** are offered (wherever possible) to permit quick content creation in each administration tool.
- **Shortcuts** help populate input fields whenever possible (shortcuts include a "copy poll" function, check all/uncheck all controls, and a quick link to populate the Acorda Head Office address when defining event location).

Content on Synapse is mainly created and managed by department administrators. A customized permission engine allows master administrators to define who can be a department administrator. For areas that are new and require initial content creation, Klick works with designated Acordans to provide in-house copywriters to produce the new content.

Each department has one or two content contributors, with approximately 75 in total. Content contributors use the customized administration tools to quickly add documents or how-tos to their department page. There are also customized administration tools for the following sections:

- News
- Documents
- How-tos
- Websites
- Events
- Contacts (departmental contacts)
- Photo albums
- Alerts
- Polls
- Users (permissions, user profiles)
- Ardsley TV (TVs that display intranet content throughout the facility)
- *BioCentury Issues* (newsletter)

Welcome Acordans to your new home!



NEWS:

Ron Cohen Interviewed on Fox Business - Jan. 13th, 2012

SYNAPSE

Pictured: An example of what appears on the television screens at Acorda's new facility. A Synapse administrator controls the top area, while the bottom strip is automatically generated by integration with Synapse news items. Each TV is connected to an iPad and the TVs are controlled by an iPad app.

All content updates are accomplished through customized administration tools developed specifically for each Synapse asset (such as news, documents, and how-tos). Each department administrator provides metadata about the asset being provided, and Synapse takes care of the rest.

Currently, there is no formal editorial workflow, although the Synapse Administration tool lets authors preview new content before publication. Content creators can create and share a preview link to the staging environment by applying a "draft" status to new content. When appropriate, the content creator can then move the content to "published" status. The Administration tool also lets users schedule future content publication or removal. This puts the onus on the tool rather than the person to "flip the switch" on schedule.

SYNAPSE

ADMINISTRATION

UsersBioCenturyScreensBack to IntranetSign Out

NEWSDOCUMENTSHOW-TO'SWEBSITESEVENTSALBUMSCONTACTSALERTSPOLLS

News

Create New News Article

Find a News Article:acordaAll DepartmentsAll StatusesReset

Showing 1-17 of 17 News ArticlesPage 1 of 1

News Headline	Status	Published Date (Future in Italic)	Featured	
Acorda: One of Westchester's Most Innovative Companies	Published	Aug 8, 2012 3:50 PM	True	edit view
Welcome New Acordans!	Published	Jul 31, 2012 2:58 PM	False	edit view
Welcome New Acordans!	Published	Jul 3, 2012 5:05 PM	False	edit view
Acorda Advertising Campaigns Recognized	Published	Jun 28, 2012 2:27 PM	True	edit view
Acorda and BIO partner to educate public about biotech	Published	Jun 22, 2012 10:56 AM	True	edit view
Welcome New Acordans!	Published	May 31, 2012 4:59 PM	False	edit view
Acorda R&D Day Webcast	Removed	May 3, 2012 1:31 PM	False	edit
Welcome New Acordans!	Published	Apr 30, 2012 11:28 AM	False	edit view
Jake Bakerman, you are the winner of Acorda's Wellness...	Removed	Mar 29, 2012 12:21 PM	False	edit
Acorda Featured on Bloomberg TV – March 26, 2012	Published	Mar 26, 2012 4:48 PM	True	edit view
Welcome New Acordans!	Published	Mar 13, 2012 4:27 PM	False	edit view
The Acorda Code of Ethics - 2011	Removed	Dec 20, 2011 2:33 PM	False	edit
Acorda Therapeutics Joins NY BioHud Valley as Founding Me...	Published	Oct 13, 2011 2:23 PM	True	edit view
Acorda Therapeutics to Present at the Morgan Stanley Glob...	Published	Oct 13, 2011 2:22 PM	False	edit view
Acorda Therapeutics Statement on ZANAFLEX CAPSULES(R) Pat...	Published	Oct 13, 2011 2:21 PM	True	edit view
Acorda Therapeutics to Present at the UBS Global Life Sci...	Published	Oct 13, 2011 2:20 PM	True	edit view
Acorda Therapeutics Announces Francine Delaware, M.D. Jo...	Published	Oct 13, 2011 2:15 PM	True	edit view

Showing 1-17 of 17 News ArticlesPage 1 of 1

Create New News Article

Pictured: The *News Administration* tool index screen. Dynamic text searching and sorting options let admin users find news postings quickly and easily. Users' admin permissions dictate which news items they can administer.

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TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and O/S	- Windows Server 2008 - SQL Server 2008
Bug Tracking/Quality Assurance	- Genome (Klick's intranet) ticketing system - Email error-stream reporting
Design Tools	- Photoshop - Illustrator - Flash
Site Building Tools	- Microsoft .NET 3.5 - SmartSite (Klick's proprietary CMS)
Content Management Tools	SmartSite
Search	Apache Solr
Other Functions	Microsoft Exchange integration

MOBILE

Users can access Synapse on mobile devices. However, the Flash components won't work on iOS devices and there is no mobile-optimized layout. Because all field personnel use Acorda-issued iPads, future Synapse enhancements might include dedicated Synapse-powered iPad Apps.

SEARCH

Apache Solr powers search on Synapse. Several factors influenced the choice of this platform, including:

- **Performance:** Ultra-fast search is one of the key factors that makes Synapse successful. Because Solr allows the search auto-completer to return results quickly, users can refine their search with nearly instantaneous results rather than waiting for a traditional search results page to load repeatedly.
- **Out-of-the-box features:** Solr made sense because it provided key features that didn't require customization. The tool's full-text capabilities, results highlighting, dynamic clustering, and configurability met the needs of Synapse almost immediately.
- **Open source:** Because Solr was open source, it was easy on the Synapse budget.



Pictured: This screen shows search on the homepage. Search is powered by a powerful faceted search that is grouped by people, websites, documents, how-tos, and apps. Users can make phone calls to other people in the head office by simply clicking on the phone number beside the person's name (in the auto-completer). Clicking the arrow or the *enter* key takes users to a comprehensive search results page.

Refining Search Results

After observing user behavior on the Klick intranet and studying user stats from the original Acorda intranet, the design team had a better understanding of when and why people use intranet search. "Far and away, the most frequent usage of search was to find people with the intention of getting in touch with them right away," says Melnick. "As a result, people results are displayed as Synapse's first search result facet with click-to-call and *email to* links displayed directly in the auto-completer box, meaning that Acordans can dial others without even leaving the Synapse page being viewed."

Other facets are also shown in the search auto-completer, including websites, documents, how-tos, and apps. To prevent the auto-completer from scrolling too far down the page, each result facet is rolled up to the top three results, with a link to explore all results. The hyperlink also shows the number of results—such as, *view all 4 people results for Smith*—so users will know when not all results are displayed in the auto-completer.

The full search results screen is broken down by each facet using tabs, with an added *Pages* tab that surfaces content pages throughout Synapse that match the searched term.

"The search look-ahead is a feature that is heavily relied upon to ensure scalability as Synapse grows," says Melnick. "As Acorda adds employees, websites, documents, how-tos, and apps, the search facility indexes that content automatically."

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Find People, Websites, How-To's, Documents and Apps

PEOPLE DEPARTMENTS EVENTS ABOUT ACORDA WEBSITES DOCUMENTS HOW-TO'S APPS

Home > Search Share this page

Search Results

You searched for: Search again

Your search for "co" returned: **12 People, 19 Websites, 92 Documents, 10 How-To's, 2 Apps, 1 Pages.**

People (12) | Websites (19) | Documents (92) | How-To's (10) | Apps (2) | Pages (1)

Showing 1-10 of 12 People

Name, Role, Department	Contact Info
Ron Cohen President & CEO, Executive	Office: (914) 347-4300 Ext. 5101 rcohen@acorda.com Map
Louisa Pastal Regional Scientific Manager - Michigan, Clinical Development & Medical Affairs	Office: 734-622-9095 lpastal@acorda.com
Shane Fink Executive Area Business Manager - Lexington, Field Sales	Office: 858-553-1760 sfink@acorda.com
Tina Miranda Recruiting Coordinator, Human Resources	Office: (914) 347-4300 Ext. 1234 tmiranda@acorda.com Map
Rothman Khan Area Business Manager - Trenton, Field Sales	Office: 856-761-2145 rkhan@acorda.com
Helena Belopolsky Area Business Manager - Houston East, Field Sales	Office: 713-557-6967 hbelopolsky@acorda.com
Mikko Thermalatte Principal Scientist - Pharmacology, Research & Development	Office: (914) 347-4300 Ext. 1234 mthermalatte@acorda.com Map
Allisa Patel Contracts Administrator, Legal	Office: (914) 347-4300 Ext. 1234 apatel@acorda.com Map
Sookie Nightman Research Associate II, Research & Development	Office: (914) 347-4300 Ext. 1234 snightman@acorda.com Map
Santiago Cortez Senior Drug Safety Specialist, Drug Safety & Risk Management	Office: (914) 347-4300 Ext. 1234 scortez@acorda.com Map

Showing 1-10 of 12 People

Page 1 of 2

Website Results

Deloitte Recap LLP
Concur
Conexis - COBRA Administration
See all 19 Website Results

Document Results

Coventry Form
Managed Markets > PA Forms
Commercial Coverage Grid - Team Version
Managed Markets > Coverage Grids - Team
Coventry Commercial Policy
Managed Markets > PA Forms
See all 92 Document Results

How-To Results

How to obtain more information on your medical/pharmacy, dental and vision plan benefits.
Human Resources > Benefits
How to submit a contract request
Legal > Contracts
How to create a page counter in SAS for a data listing.
Biostatistics > SAS
See all 10 How-To Results

App Results

P&V Award Committee
Contract Request Forms
See all App Results

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Arnold Lee
Sr Facilities Manager, Facilities

Teamwork... uh, huh!

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Pictured: The complete search results screen, with tabs to allow for navigation across facets.

RESULTS AND ROI

The Synapse team doesn't stray far from its original goals when figuring out ways to measure the site's success. "The original business goals of Synapse should always be the yardstick against which success should be measured," says Melnick. "Does Synapse improve communication and preserve culture, and are Acordans adopting the system? In all three cases, yes."

"The analytics approach can be summarized in this way," says Peter Cheung, Associate Director, Analytics. "We tied the measurement strategy to the initial business goals of Synapse. It wasn't so much about dollars and cents as it was about promoting culture, improving communication throughout the organization, and ensuring adoption. Our key performance indicators were carefully selected from key actions that could be taken on Synapse that indicate the initial goals are being met, including participation in *FaceGame*, clicking on apps and assets within the customizable panels, and reading news items.

"The vast majority of people using Synapse—a whopping 98 percent of Acordans—performed at least one key action," he says. "In other words, people weren't just visiting Synapse, they were using it to help improve the way they work, communicate, and get informed."

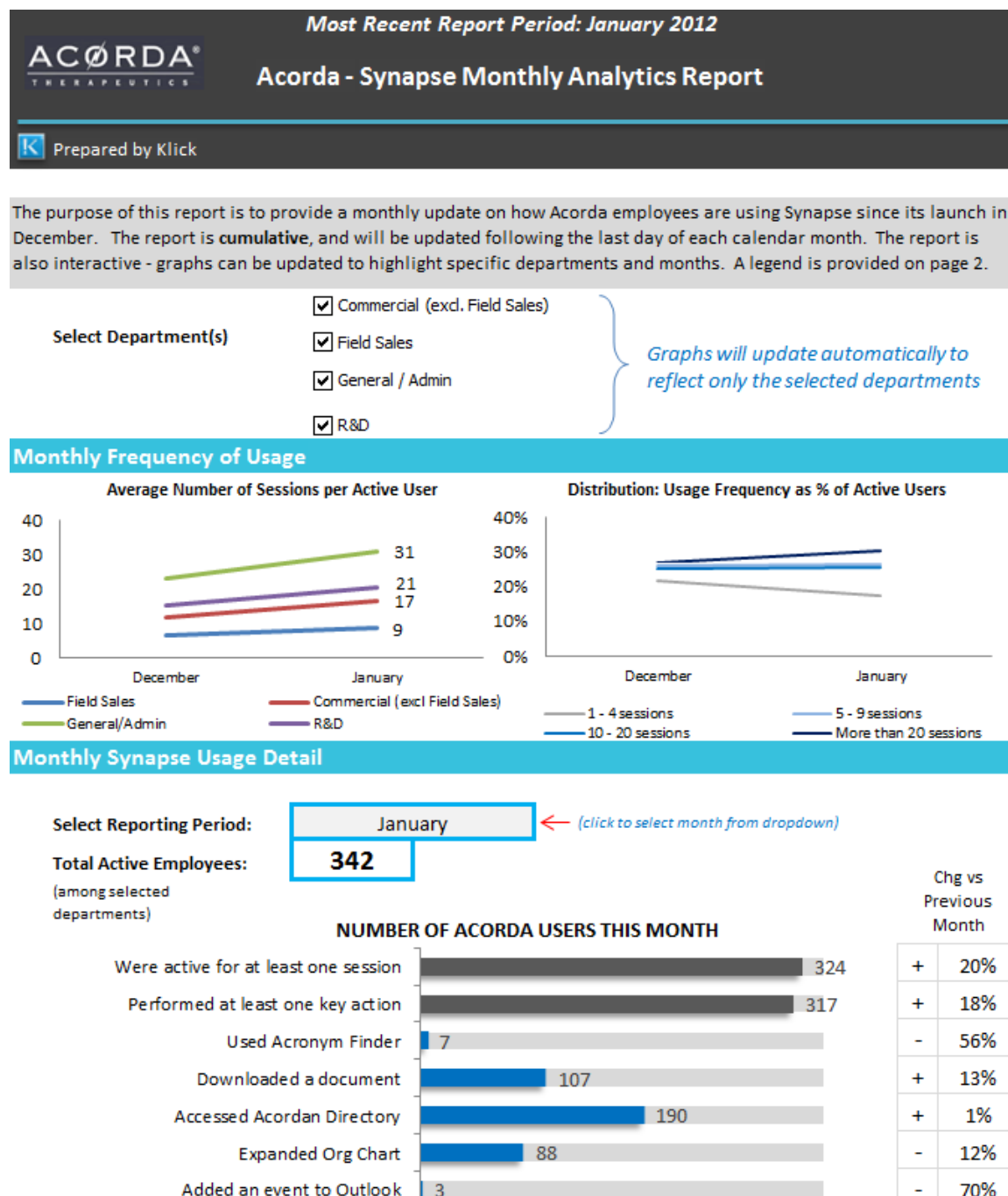
Acorda is still adapting to Synapse, and over time it's becoming more entrenched in the company's day-to-day processes. Each day, more content creators and department administrators lean on it more heavily to disseminate information—and, increasingly, to improve productivity and collaboration. This gradual adoption is part of the design. "The design affords the scalability necessary to grow the system along with the organization," says Cheung.

Klick and Acorda agreed on several user actions to serve as benchmark measurements for the site. These include:

- Number and percent of employees who access Synapse, and how often
- Percent of employees who did more than just visit the Synapse homepage
- Percent of employees who customized Synapse (using *My Apps*, *My Websites*, *My Documents*, or *My How-Tos*)
- Percent of employees who read at least one news item
- Percent of employees who have used the *Acordan Directory*
- Uptake of social features (such as liking and commenting)
- Quantity of P&V award nominations (37 nominations as of this writing!)

For a time after launch, Klick sent Acorda monthly reports tracking these numbers in an interactive spreadsheet. One of the key insights from a report produced shortly after launch was that engagement was particularly strong in work-related functions (the app section with forms and tools), but not yet as strong among culture-building actions (photos, *FaceGame*, and so on). The takeaway from this is that it might take some time for users to become accustomed to having both types of content available in one portal.

The team continues to track the numbers through a custom Google Analytics implementation.



Pictured: A sample analytics report. Klick produced these reports for Acorda after launch to track Synapse usage and trends.

LESSONS LEARNED

The Synapse teams shares some lessons learned:

- **Maintain momentum after launch.** “Synapse launched to great fanfare at Acorda, but after the initial buzz died down there was a slight ‘hangover effect.’ Despite Klick’s best effort to seed useful content and allow users to hit the ground running with smart personalization recommendations, Synapse’s momentum eased and some Acordans became somewhat indifferent to the platform. Part of the issue was that, despite the detailed walkthrough at launch, some Acordans elected to not fully explore or utilize the features of the site.”
- **Selling the feature is sometimes just as important as the feature itself.** “A handful of power users grew largely dependent on Synapse’s click-to-dial feature—clicking ‘dial’ anywhere near a user’s name in Synapse would dial their phone to that person’s extension—while others had no awareness that feature even existed. Users who have the feature demonstrated to them are surprised and use it moving forward! This issue emphasizes the importance of ensuring ‘feature awareness,’ going beyond fundamental control affordance.”
- **Recruit confederates.** “During the interview process, several Acordans voiced sensitivity to the release of any new application that would add to their already significant workload. As a result, Synapse’s user sentiment was somewhat low and the probability of a successful launch was at risk even before the design took shape.

“While the negative stigma associated with Synapse was overcome to a great extent after launch, the feeling is that the system would have benefited from having recruited Acordans as intranet advocates in place *before* launch. Even a few Acordans actively demonstrating excitement about Synapse would have influenced others to adopt the same attitude.”

- **Context is king.** “Individual documents and how-tos are each represented with a page on Synapse that displays metadata about the asset (publish date, contact, description, etc.). Originally, this included the ability to ‘like’ and comment on the asset. After reflecting on this design and gathering feedback from the Acorda Synapse team prior to launch, it was decided that ‘liking’ work-related assets wasn’t appropriate, as the social context is awkward—what does it actually mean to ‘like’ a document? This feature was subsequently removed from asset-related pages.

“The commenting function has remained but has floundered since assets aren’t naturally conducive to conversation. Additionally, there is a risk that a comment is added to a document page that requires a response, yet a response is never provided since asset creators are not notified when a comment is added. News postings that announce social milestones (weddings, baby announcements, etc.) do garner good quantities of comments and ‘likes,’ underscoring the learning that (social) context is everything!”

Luzerner Kantonalbank AG (2013)

Using the intranet: Luzerner Kantonalbank AG (LUKB) is the leading bank in Canton Lucerne, Switzerland, with 27 branches and approximately 1,000 employees.

Headquarters: Lucerne, Switzerland

Number of employees the intranet supports: 1,000

Locations where users use the intranet: Switzerland (27 branches in Canton Lucerne and Zurich)

Annual sales: Not applicable

Design team:

An in-house team of six people formed the core team, with Pius Peter as internal project manager. For workshop sessions, three to six representatives from different business departments were involved. Namics AG moderated the workshops, developed the business and technical concepts and the design, and implemented the solution.

Members:

In-house: Pius Peter, Project Manager; Roger Müller, Content Migration and Quality Manager; Roger Baumeler, Requirements Analyst; Peter Mitura, Webmaster; Esther Schwarzentruher, Webmaster; and Rudolf Künzli, Head of Steering Committee

Namics AG: Bernd Langkau, Program Manager and Intranet Consultant; Samuel Peyer, Project Manager and SharePoint Consultant; Kirsten Pilih, Designer; Markus Spiekermann, Technical Architect; Urs Wanner, Software Engineer; and Lars Kadner, Frontend Engineer

SUMMARY

The Luzerner Kantonalbank AG (LUKB) intranet harnesses and exploits the power of metadata and taxonomy to ensure that the right kind of content automatically makes it to the right places. Marrying this with a calm, consistent design throughout makes this intranet an unusually supportive tool.

Employees can find most of the information and tools they want right on the homepage; upon login, users see personalized information, such as the calendar in the lower left column (*Termine*). The page also shows a list of appointments that match the user's interests, which are chosen by filtering (from all LUKB events) those categories the user has expressed interested in (as with the news filter). Users can filter news and events by locations, departments, categories, and products. The homepage shows events and promotions, important links, and news. What appear to be simple news and events lists are actually powered by a sophisticated, carefully considered backend system that accommodates metadata for news and calendar items, as well as the rest of the intranet's content.

Depending on the user's background, the homepage displays the current interest rates (Zinssätze) in a table in the middle of the right column. The site's taxonomy model facilitates efficient use of metadata, including about interest rates, which is imported from other systems and is linked to the intranet content.

Inhalt

Suchbegriff

Person

Name oder Vorname

Home

Hilfe

ICT Support & Shop

Interner Notruf

Peyer Samuel

Meine Bank

Luzerner Kantonalbank

Home

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Über uns

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PV-Events September

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Do 30.08.12

Gewerbekunden-Anlass, Sursee

Do 30.08.12

Info-Veranstaltung Private Banking mit anschl. Apéro

Do 06.09.12

Wohnbau Workshop

Fr 07.09.12

Wohnbau Workshop

Fr 07.09.12

Gewerbekunden-Anlass, Schüpfheim

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zur Übersicht

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Fr 31.08.12

Ausbildungserfolge August 2012

Express Info

Abwicklung Zahlungsverprechen dezentral - verlängert

Fr 31.08.12

Express Info, Darlehen, Konditionen

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Handlungsmassnahmen bei Liquidations- und anderen Produkten

Förderkredit KMU, Basisleistungen & Produktmanagement IF

Do 30.08.12

Arbeitsanweisung Förderkredit KMU

Express Info

Mi 29.08.12

Erfolgreiche Evakuations-Übung im Regionalsitz Ebikon!

Express Info, Konten, Konditionen

Di 28.08.12

Zinssatz-Anpassungen im Passiv-Bereich per 01.10.2012 bzw. 01.11.2012

Express Info

Di 28.08.12

E-Banking: Service "E-Mail / SMS-Benachrichtigung", ab 15.00h wieder verfügbar

Weisungen, Kreditmanagement DF

Di 28.08.12

Aktualisierung Weisung D 6.03 CreditMaster

Express Info, Konditionen, Aktionärs-Sparkonto

Di 28.08.12

Aktionärs-Sparkonto: Gebühr für Nichteinhaltung der Kündigungsfrist

GL-Telefon

Di 28.08.12

28.08.2012 - GL-Telefon

Express Info

Di 28.08.12

E-Banking: Ausfall Service "E-Mail / SMS-Benachrichtigung", Ausfall seit 25.08.2012

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Factsheet-Übersicht

Aktuell

US-Foreign Account Tax Compliance Act (FATCA)

Crossborder Geschäft

Zinssätze

Zahlen	Sparen	Vorsorgen	Kassenobligation	Hypothek
				30.08.2012
Privatkonto			0.100 %	
E-Privatkonto			0.100 %	
Privatkonto bis 20			1.000 % bis CHF 20'000	
			0.100 % ab CHF 20'000	

Zinssätze drucken

Links

Private Banking

Konditionen Anlageprodukte

Konditionen Finanzierungsprodukte

Finanzanalyse/Handel

Portfolio Management

Spezialberatungen

LUKB Expert-Fonds

Swisscanto Extranet

Börsenmonitor

Vermögens-Navigation

Marktbearbeitung

Verkaufsunterstützung

Betreuungskonzept

Leistungsversprechen

Aufträge/Infos Führungssupport

© 2011 Luzerner Kantonalbank

Pictured: Users can access tools, news, current rates, and more from the homepage.

To cater to various user types, designers created customized homepages with helpful content and links targeted for each intranet user group. For example, the homepage for client advisors shows current interest rates, while the homepage for marketing staff displays current news. Employees can choose the most suitable homepage or "startpage" to see what they want and need.

Inhalt Suchbegriff Person Name oder Vorname Home | Hilfe | ICT Support & Shop | Interner Notruf Peyer Samuel

Meine Bank Luzerner Kantonalbank

Home News & Termine Produkte Marktbearbeitung Unterstützung Personal Über uns Mein Intra

Aktionärs-Sparkonto

Service-Paket Premium

iPad gewinnen (2/3)

PV-Events September

News

Personal, Express Info Fr 31.08.12

Ausbildungserfolge August 2012

Express Info Fr 31.08.12

Abwicklung Zahlungsverprechen dezentral - verlängert

Express Info, Darlehen, Konditionen Do 30.08.12

Abwicklung Borgen für Privatbanken und andere Produkte

Förderkredit KMU, Basisleistungen & Produktmanagement F Do 30.08.12

Arbeitsanweisung Förderkredit KMU

Express Info Mi 29.08.12

Erfolgreiche Evakuations-Übung im Regionalsitz Ebikon!

Express Info, Konten, Konditionen Di 28.08.12

Zinssatz-Anpassungen im Passiv-Bereich per 01.10.2012 bzw. 01.11.2012

Express Info Di 28.08.12

E-Banking: Service "E-Mail / SMS-Benachrichtigung", ab 15.00h wieder verfügbar

Weisungen, Kreditmanagement DF Di 28.08.12

Aktualisierung Weisung D 6.03 CreditMaster

Express Info, Konditionen, Aktionärs-Sparkonto Di 28.08.12

Aktionärs-Sparkonto: Gebühr für Nichteinhaltung der Kündigungsfrist

GL-Telefon Di 28.08.12

28.08.2012 - GL-Telefon

Express Info Di 28.08.12

E-Banking: Ausfall Service "E-Mail / SMS-Benachrichtigung", Ausfall seit 25.08.2012

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Wohnbau Workshop

Fr 07.09.12

Wohnbau Workshop

Fr 07.09.12

Gewerbekunden-Anlass, Schupfheim

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Dep. FK

Dep. P&G

Dep. PB

Dep. Z

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Crossborder Geschäft

Zinssätze

Zahlen	Sparen	Vorsorgen	Kassenobligation	Hypothek
				30.08.2012
Privatkonto			0.100 %	
E-Privatkonto			0.100 %	
Privatkonto bis 20			1.000 % bis CHF 20'000	
			0.100 % ab CHF 20'000	

Zinssätze drucken

Links

Konditionen Anlageprodukte

Konditionen Finanzierungsprodukte

Finanzanalyse/Handel

Portfolio Management

Spezialberatungen

LUKB Expert-Fonds

Swisscanto Extranet

Börsenmonitor

Private Banking

Vermögens-Navigation

Marktbearbeitung

Verkaufsunterstützung

Betreuungskonzept

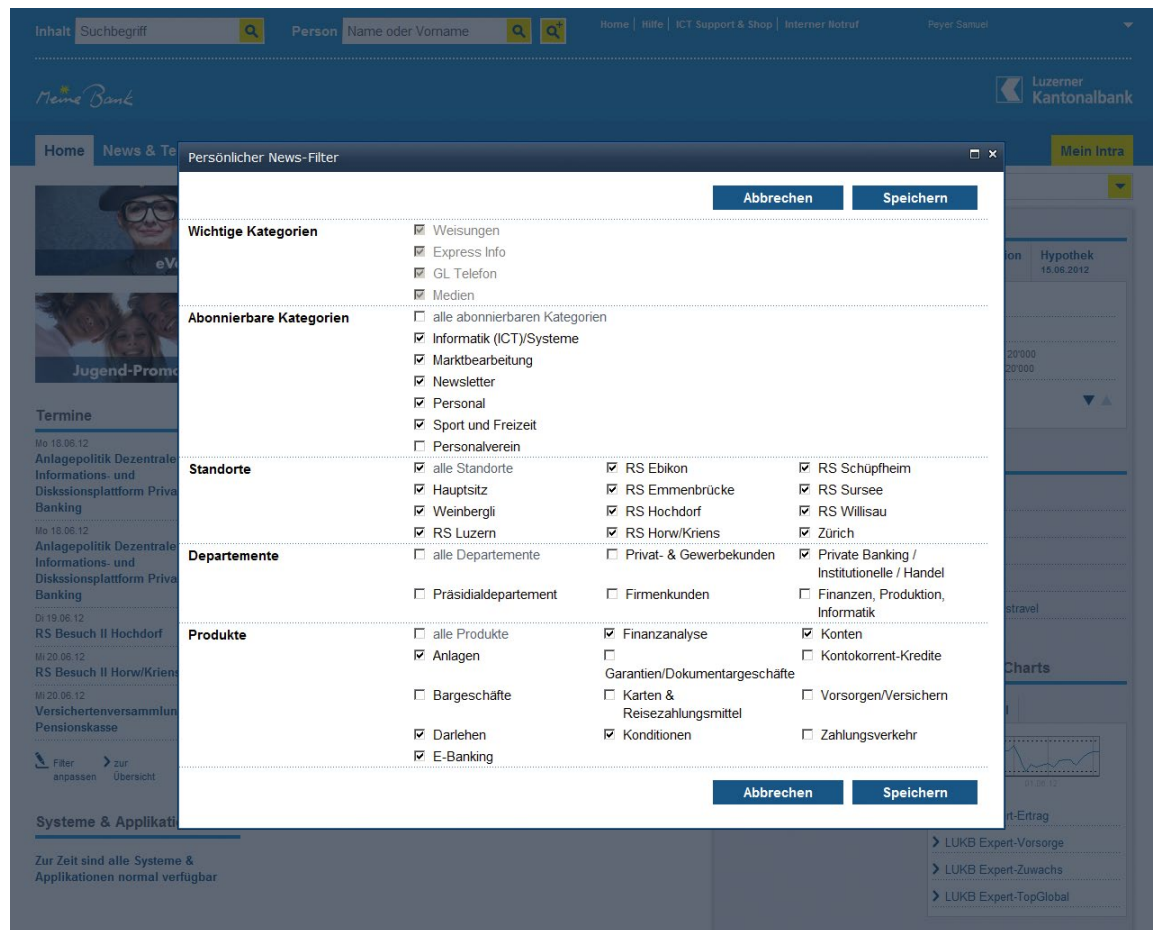
Leistungsversprechen

Aufträge/Infos Führungssupport

Pictured: Users can select the homepage that best suits their needs from a set of homepages.

To ensure that users see the news they need and care about, some news is marked as obligatory, meaning all users must see it. Those items are grayed out in the list for selecting news channels, so users can see them and know they can't be removed. As for the rest of the news, users can choose topics from five different channels:

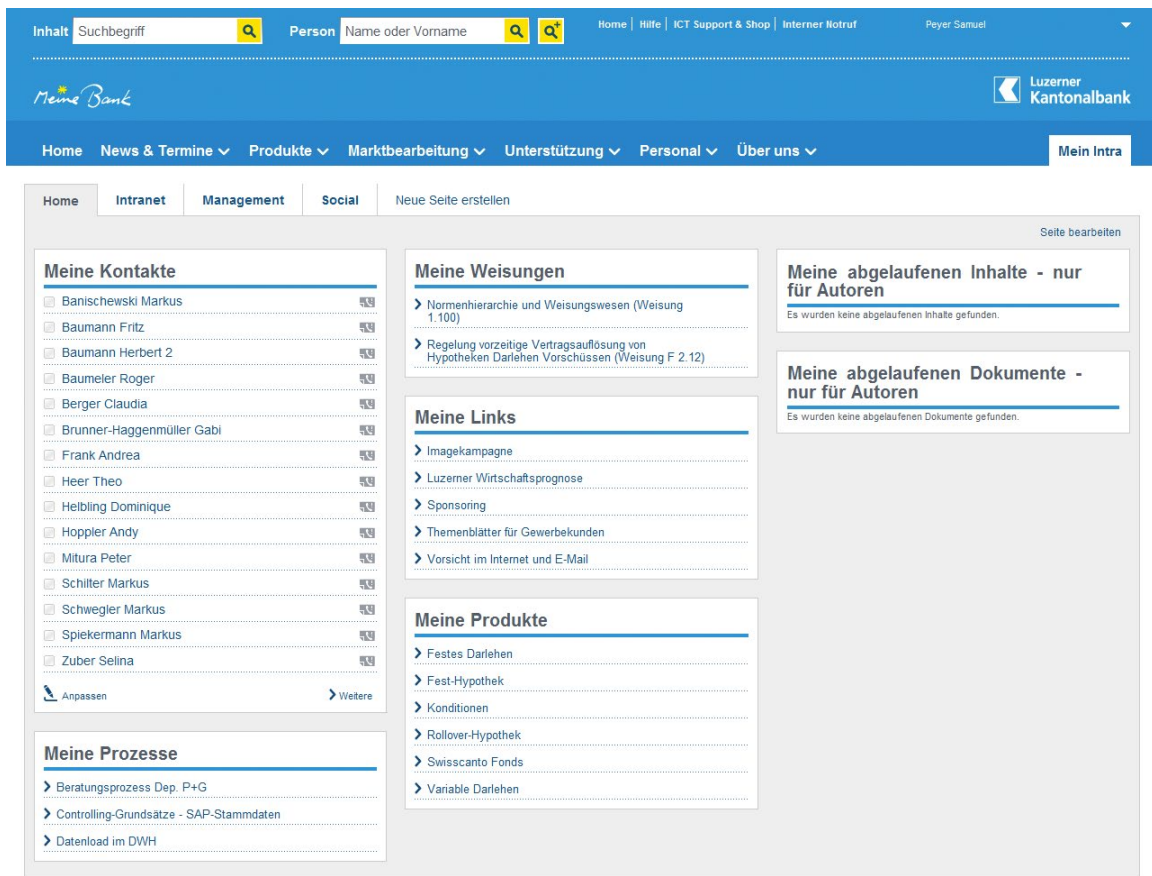
- *Wichtige Kategorien (Important Categories)*
- *Abonnierbare Kategorien (Subscribable Categories)*
- *Standorte (Locations)*
- *Departemente (Divisions)*
- *Produkte (Products)*



Pictured: Users can choose the news channels that suit them.

In addition to choosing a homepage, news channels, and appointments (*Termine*), users can work with another helpful personalized area, *Mein Intra* (*My Intra*) section of the intranet. The yellow tab in the global navigation is set off from the others, to the far right. Users can customize this dashboard by adding unlimited pages, with up to 15 elements (or web parts) per page. Because of the consistent metadata scheme, whenever a document is added, it is automatically positioned in the correct web part. Among the sections are:

- *Meine Kontakte* (*My Contacts*)
- *Meine Prozesse* (*My Processes*)
- *Meine Weisungen* (*My Instructions*)
- *Meine Links* (*My Links*)
- *Meine Produkte* (*My Products*)
- *Meine abgelaufenen Inhalte* (*My Outdated Content*; this section is only for authors)



Pictured: Users can thoroughly customize the intranet's *Mein Intra* (*My Intra*) section to best suit their needs.

The top-level navigation menu is persistent and appears on all intranet pages. The white text on the blue tabs is clearly legible; on the selected tab, the background changes from blue to white and the text changes from white to blue so that it's clearly distinguished from the other menu items. This helps users stay grounded as they traverse the site.

Employees can search for colleagues using the *Person* field in the upper left. As the user types, relevant people appear in the suggestions list, which includes pictures of the employees to help users recognize people they know by face. The person's name, location, and phone number—with a flyout click-to-dial feature—also appear in the list. But, on this intranet, you don't just click a name to move forward; designers offer several possible actions to take here via three small icons to the right of each name and description. The first icon, a miniature representation of a profile document, allows users to bookmark the contact, which adds the person to the logged in user's *My contacts* area. The envelope icon opens and addresses an email to the selected person. The telephone icon lets users send a phone notice (similar to a missed call message).

Users can also click the person's name or photo to go directly to the profile page.

The screenshot displays the Luzerner Kantonalbank (LKB) intranet interface. The top navigation bar features a search field with 'Suchbegriff' and 'Person' tabs, and a 'Name oder Vorname' search field. The main content area is organized into several sections:

- News:** Includes a 'Ausbildung' (Training) section with employee profiles and contact information.
- Termin:** Lists upcoming events such as 'Wohnbau Workshop' and 'Gewerbekunden-Anlass, Sursee'.
- Systeme & Applikationen:** Includes a link to 'Intranet LUKB'.
- Kunde im Mittelpunkt (KIM):** A central section featuring a circular diagram of service phases, a list of 'Aktuell' (Current) news items, and a table of 'Zinssätze' (Interest Rates).
- Links:** A list of links to various services and products.
- Private Banking:** A section dedicated to private banking services.

The bottom of the page shows the copyright notice '© 2011 Luzerner Kantonalbank'.

Pictured: The people search list shows the employee's picture, name, and location; it also lets users bookmark, email, and call the person easily and quickly.

The magnifying glass icon just to the right of the search field links the user to the advanced people search result page. Once there, users can create their own search statements. For example, users can search for all employees in the "Hochdorf" office who hold the position of "vice president."

The people search results page has a few more features than the suggestion list, including functionality to let users add the search results to their contacts or export them to Outlook.

Inhalt Suchbegriff Person Name oder Vorname Home Hilfe ICT Support & Shop Interner Notruf Peyer Samuel

Home Bank Luzerner Kantonalbank

Home News & Termine Produkte Marktbearbeitung Unterstützung Personal Über uns [Mein Intra](#)

Home > Suche > Mitarbeiter Suche Seite

Einfache Personensuche Person müller andr Suche auf

Erweiterte Personensuche

LUKB Mitarbeitende

Name	Vorname	LU Nummer	Kontakt	Organisation	Favoriten, Outlook Export, Telefonzettel
 Müller	Andrea	LU13090	Tel. +41 41 206 25 34 Fax E-mail schreiben	PU / 400 Luzern 88	

Meine Outlook Kontakte

Name	Vorname	Firma	Kontakt	Adresse
Müller	Andreas	Comit AG	Tel. Mobile E-mail schreiben	Weinberglistrasse 4 6005 Luzern
Müller	André	Luzerner Kantonalbank	Mobile E-mail schreiben	

Allgemeine Kontakte

Name	Vorname	Firma	Kontakt	Adresse	Outlook Export
Müller	Andreas	Swisscom	Tel. E-mail schreiben	Weinberglistrasse 4 6005 Luzern	

Pictured: Users can save the people search results to their contacts list.

The user profile page first shows a clear picture of each employee, along with his or her name and title. The rest of the key information, such as location and phone numbers, appears in the profile's top section, while other information, such as a dynamic org chart (the "Organigramm" tab) appears in tabs below it.

As in the search list, users can use icons to perform various actions, including to bookmark the information or email the employee.

Peter Pius (ZIA)
ICT Projekte & Anforderungs-Management

Tel. +41 41 206 20 80
Mobile +41 78 600 11 11
Fax +41 41 206 20 80

LU Nummer LU12553
Kurzzeichen Pep
Instradierung ZIA

Plus Peter@lukb.ch merken? Outlook Telefonzeitel

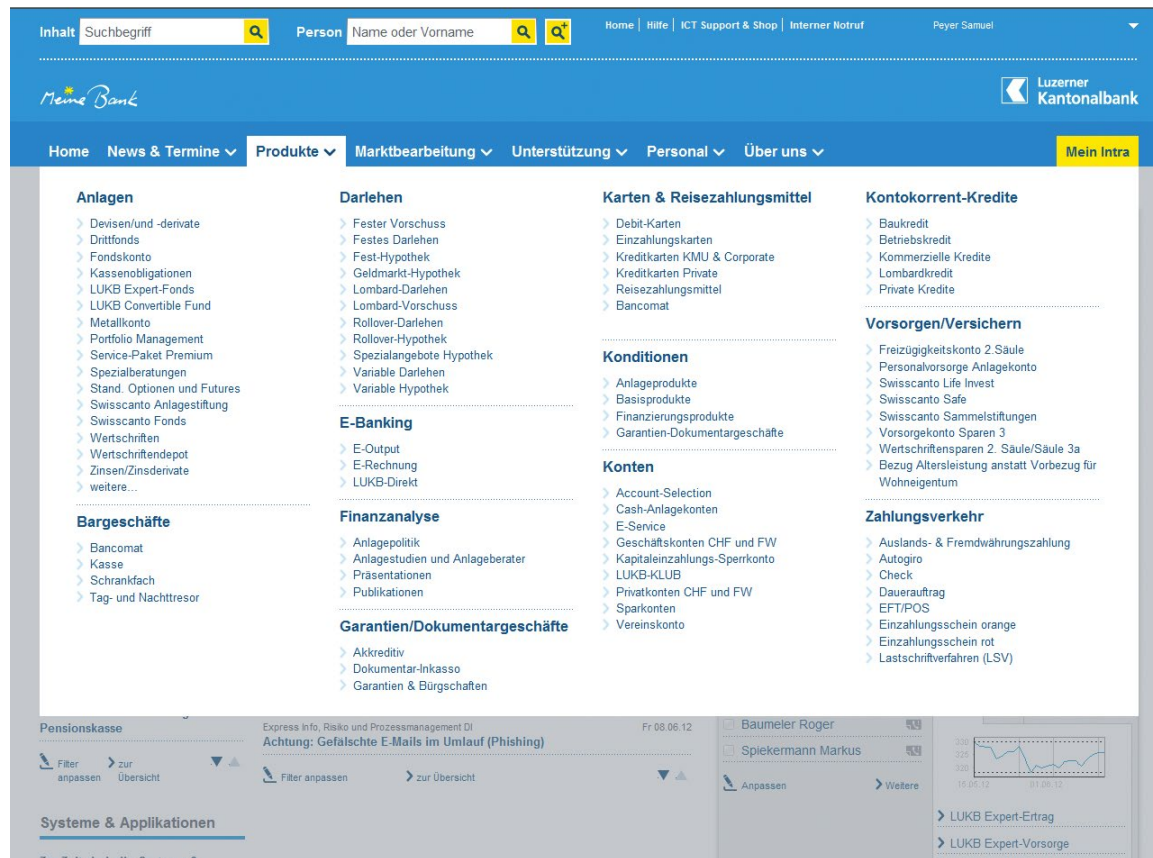
Person	Organisation	Organigramm
Kenntnisse Projektmanagement, Projekte, PEG, Abteilungsseuer		
Bankmandate		
Andere Mandate / Vereine APV Willisau		
Gremien Lenkungsausschuss Online-Kanal		
Rang Vizedirektor		
Funktion		
Titel Dipl.Bauing.ETH		
Sprachkenntnisse Englisch		
Hobbies Wandern, Natur, Garten, Familie		

Pictured: On the profile page, important information appears at the top, with less important information following below it in tabs.

Designers chose a mega menu for navigation because it lets users see more choices simultaneously, scan them, and with one mouse click access the page they desire. Designers know that the more choices users have to make before seeing the related menu items, the more chances they have to make the wrong choice. Although showing about 90 links at once might seem daunting, designers found a way to organize the links so users can easily scan them—that is, the headings are large, blue, and bold—and easily make their choices. If users like the main topic, they can scan some of the items below it. Because of the white space and the subtle lines between sections, it's easy to tell which links go with which heading.

One flaw we often see with mega menus is that users can mistake the large menu for part of the main page. Designers avoided this issue here with a few important visual signals:

- There is vertical space between the menu's edges and the page on both sides.
- The menu tab's background is the same color as that of the mega menu. This is a cue to users that they are in a particular menu.
- There is no line or other separator between the tab and the page, so they flow into each other.
- The page behind the mega menu is grayed out, so users know they can't act on that page in the current state.



Pictured: The mega menu lets users easily scan dozens of links to almost every financial product at LUKB. This is the intranet's largest mega menu.

If users think they know the term they're looking for, they can choose to use the site's extensive search features. The search results page displays the search query, results sorted by relevancy, clear headings, short descriptions, URLs, and an icon denoting the document type (such as Word or PDF). Users can scan the titles or further refine the list using the *Trefferliste filter (Result List Filter)* area on the right. The taxonomy model makes it easy to use the metadata, so users can refine their search results. As for the UI, check boxes are often the easiest way for users to deal with filters, as they can easily select and deselect the boxes, and see which are currently selected. Users can choose from several filters, including:

- *Erstellt (Creation Date)*
- *Geändert (Last Edited)*
- *Inhaltstyp (Content Type)*
- *Produkte (Products)*
- *Sachverständiger (Expert)*
- *Weisungen (Instructions)*

Inhalt: Person:

Home | Hilfe | ICT Support & Shop | Interner Notruf Peyer Samuel

Meine Bank Luzerner Kantonalbank

Home News & Termine Produkte Marktbearbeitung Unterstützung Personal Über uns Mein Intra

Home > Suche

CEO [Volltext]

Referat Bernard Kobler, CEO
LUKB, 31.01.2012 – Referat Bernard Kobler CEO Seite 1 Bilanz-Mediengespräch 2011 der Luzerner ... Geschäftsjahr 2011 LUKB, 31.01.2012 – Referat Bernard Kobler CEO Seite 4 Zinsmarge stabil zu halten ...
http://intranet.lucorp.ch/news-terminenews/Documents/2012-01-31_Bilanz-MK_Referat_Bernard_Kobler.pdf - 44 KB - Müller Roger (Dki) - 31.01.2012 04:57:51

Team REVI
Auditor (CISA) Tätigkeit: Software-Entwickler, Informatik Projektleiter, CEO eines KMU im Bereich ...
http://intranet.lucorp.ch/unterstuetzung/interne_revision/Documents/Team_REVI.pdf - 207 KB - Müller Roger (Dki) - 30.11.2011 15:06:40

Leitlinien Unternehmen mit Verantwortung
Soziale Arbeit, Bernard Kobler ist als CEO LUKB Mitglied des Patronatskomitees. Der Verein strebt ...
http://intranet.lucorp.ch/personal/m_gleichgewicht/Documents/Leitlinien_Unternehmen_mit_Verantwortung.pdf - 34 KB - Schwarzenrüben Esther (Zpbj) - 19.01.2012 12:00:00

Besoldungsordnung
<http://intranet.lucorp.ch/personal/mitarbeiter-handbuch/Documents/Besoldungsordnung.pdf> - 53 KB - Bieri Beat (Dpc) - 09.01.2012 09:32:57

Arbeitsanweisung
MBL FTL FKUBE F ... Anlageberatung / Depotgeschäft im F ... Mit dieser Arbeitsanweisung sollen folgende ... geprägt (Eigentümer ist z.B. Alleinaktionär, CEO und Verwaltungsrat) kann auch ein BEAT-Fragebogen ...
http://intranet.lucorp.ch/unterstuetzung/arbeitsanweisungen/arbeitsanweisungen/AAW_Anlageberatungsprozess_F.docx - 43 KB - Klingler Patricia (Fa) - 06.01.2012 12:00:00

VSKB Basispräsentation
http://intranet.lucorp.ch/marktbearbeitung/praesentationen/Documents/VSKB_Standard_Praesentation_2011.pdf - 4 MB - Müller Roger (Dki) - Benutzer - 16.12.2011 15:41:26

Kompetenzordnung der LUKB
GL LUKB i. Präsident der Geschäftsleitung / Konzernleitung CEO LUKB J. Mitglied der Geschäftsleitung ...
http://intranet.lucorp.ch/ueber_uns/fundament/reglemente/Documents/2010-05-03_Kompetenzordnung.pdf - 1 MB - Müller Roger (Dki) - Gabriel Miriam (Px) - 22.11.2011 15:49:14

Einladung auf der Bank 2012
das er sich unter anderem als Langlauf-Nationaltrainer, als CEO der FIS Alpin Ski WM 2003 in St. ... als Chef Leistungssport von Swiss-Ski und als CEO der Eishockey-WM 2009 in der Schweiz ...
http://intranet.lucorp.ch/marktbearbeitung/kundenanlaesse/Documents/Einladung_auf_der_Bank_2012.pdf - 1 MB - Müller Roger (Dki) - 21.12.2011 09:11:55

Reglement LA-VR
einerseits der Mitglieder des Verwaltungsrates und des CEO, andererseits, unter Beizug des CEO, der Geschäftsleitung. Er beurteilt periodisch die ...
http://intranet.lucorp.ch/ueber_uns/fundament/reglemente/Documents/2009-01-01_Reglement_LA_VR.pdf - 54 KB - Müller Roger (Dki) - Fischer Louis (Dr) - 22.11.2011 13:31:47

LUKB Sicherheitshandbuch
Fachverantwortung: (Weisungsverfasser) DI ... Das Sicherheitshandbuch beschreibt die Sicherheitsanforderungen, die auf Basis der LUKB-Prozesse und der ... CEO/Leiter Risiko und Prozessmanagement ...
http://intranet.lucorp.ch/unterstuetzung/weisungen/weisungen/1.104/Sicherheitshandbuch_LUKB.docx - 39 KB - Wildhaber Philipp (Zpbj) - 02.01.2012 12:00:00

Trefferliste filtern

- Erstellt
 - 2001
 - 2005
 - 2010
 - 2011
 - 2012
 - April (7)
 - Februar (6)
 - Januar (14)
 - Juni (1)
 - Mai (8)
 - März (12)
- Geändert
- Inhaltstyp
 - Arbeitsanweisung (1)
 - News (11)
 - Weisung (13)
- Produkte
 - Anlagen (3)
 - Finanzanalyse (1)
- Sachverständiger
- Weisungen
 - 1.101 (1)
 - 1.102 (1)
 - 1.104 (1)
 - 4.101 (1)
 - D 1.03 (1)
 - D 1.06 (1)
 - D 1.08 (1)
 - D 5.07 (1)

1-10 (125) >

Pictured: Users can filter search results by various factors, including creation date, last edited, and content type.

Customer advisors regularly use the financial product pages to find information for clients. It's thus important that they find correct, current, and thorough information in these areas. The intranet again uses metadata to automatically populate the product pages in understandable ways. This eliminates the usually necessary work by content authors, as well as eliminating human error in finding and harnessing information about products' processes, interest rates, related forms and instructions, and affiliated products.

To ensure advisors benefit from knowledge transference, layout of the product pages is kept consistent: the most important information is on the first tab, with other information, such as *Weisungen (Instructions)* and *Prozesse (Processes)*, in the embedded tabs. A list of *Verwandte Produkte (Related Products)* and Word and Excel templates (*IDV Dokumente*) appear in the right rail.

Pictured: The very popular product pages are consistently laid out across the intranet and are auto-populated via metadata.

Like product pages, the process page, which lists all processes, is also heavily supported by metadata. In a few keystrokes, users can find any process in the process management system (which is imported daily) and see the name, process structure, search term, process number, and responsible person. This is a “filter as you type” functionality, which filters possible matches as users type.

The screenshot shows the 'Prozesse' (Processes) section of the Luzerner Kantonalbank intranet. The top navigation bar includes a search bar, a user profile for 'Peyer Samuel', and links to 'Home', 'Hilfe', 'ICT Support & Shop', 'Interner Notruf', and 'Mein Intra'. The left sidebar contains a taxonomy menu with categories like 'Anleitungen', 'Arbeitsanweisungen', 'Beratungs-Center', 'E-Banking Support', 'Finanzen & Controlling', 'ICT-Dienstleistungen', 'IDV Dokumente', 'Interne Revision (REVI)', 'Kreditmanagement', 'Logistik', 'Marketing', 'Projektmanagement', 'Prozesse', 'Rechtsdienst & Compliance', 'Risiko & Sicherheit', 'Service Center Basisleistungen', 'Systeme & Applikationen', and 'Weisungen'. The main content area features a 'Prozesse filtern' (Filter Processes) section with a dropdown menu set to 'Personal'. Below this is a table of processes:

Kennung	Bezeichnung	PV	Prozessgruppe
K-F-06-050	Personalsicherheit errichten-anpassen	Felder Roger	Kernprozesse
U-P-09-001	Personalportfolio	Stadelmann Jürg	Unterstützungsprozesse
U-P-22-001	Personaleintritte	Stadelmann Jürg	Unterstützungsprozesse
U-P-22-002	Personalmutationen	Stadelmann Jürg	Unterstützungsprozesse
U-P-22-003	Personalausritt	Stadelmann Jürg	Unterstützungsprozesse
U-P-22-008	Sonstige Personalebenkosten	Stadelmann Jürg	Unterstützungsprozesse

On the right side, there are 'Links' (Links) to 'Prozesslandkarte', 'Arbeitsanleitung SCODI 4P', and 'Dienstleistungskatalog Prozessmanagement', as well as 'FAQ's' (FAQs) for 'Check FAQ' and 'LSV FAQ'.

Pictured: Users can search for any processes in the process management system.

The LUKB intranet is consistent and offers meaningful information throughout, much based on its taxonomy system. These traits, along with personalization and customization features, help all employees, but cater especially to the customer advisors—the people who can truly make the difference in the business.

BACKGROUND

The vision driving the new intranet had many branches, including: improve workflows, use shared knowledge, strengthen employee participation, and create “digital values.”

Two events were driving this push toward change:

- **Outdated technology:** The existing intranet used Microsoft CMS and SharePoint 2003, which were outdated.
- **Changing agency support:** The company’s partner agency, Aseantic, had stopped providing project support.

Pius Peter, Vice President and Project Manager, outlines the mission statements developed to guide the project:

- Users should be able to find their desired information at any time through a well-structured information design and a powerful search function.
- A flexible, user-friendly (partly personalized) user interface should support work processes.
- Information and functionality should be reachable through (ideally) only one click.
- Collaboration, information flow, and knowledge exchange should be improved through the use of Web 2.0 technologies.

Home - Homepage

BIBLIOTHEK

- > Verwaltungsrat VR
- > Geschäftsleitung
- > Präsidialdepartement D
- > Individual- & Gewerbekunden I
- > Firmenkunden F
- > Private Banking/Institutionelle P
- > Finanzen, Produktion, Informatik Z

WICHTIGE THEMEN

- > ICT Infoportal
- > Produkte/Konditionen
- > Gesetze/Reglemente/Politiken
- > Weisungen
- > Übersicht LUKB-Strategie
- > Projekte
- > Personal
- > Marketing/Kommunikation
- > Rechtsdienst & Compliance
- > Services



Marketing Ideenbox



Aktionärs-Sparkonto Promo
19. Mai bis 31. August 2010

Mitarbeiter Verzeichnis

Nachfolgend der Link zum neuen 111
[Mitarbeiter Verzeichnis der LUKB](#)

Mitteilungen/News

20.07.10	Express Info	Konditionenblatt, Änderung: Zinssätze Kassenobligationen
20.07.10	Konditionen	Neue Kassenobligationen-Sätze ab 21.07.2010
16.07.10	Achtung	Geruchsimmissionen in der HB
15.07.10	Basisleistungen & Produktmanagement	Einführung LUKB Profi-KLUB - Durchstarten nach dem Studium
15.07.10	Basisleistungen & Produktmanagement	Einführungstermin MasterCard Business Card
15.07.10	Personal	Menuplan 19. - 23. Juli 2010
14.07.10	Marketing	Children's Corner im KKL Luzern
13.07.10	Fachzentrum Anlagen	Strukturtypen & Composite Reports PFM per 30.06.2010
13.07.10	Weisungen	Weisung F2.80 CreditMaster angepasst
13.07.10	Ausbildung	Im Gleichgewicht 2010

[Übersicht](#)

20.07.2010 - 13:19:45

Suche (Erweiterte Suche)

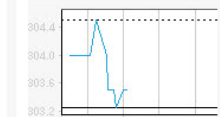
☐ Nur in Titeln

Daniel Lütolf (lur12585)

[Zur Bearbeitungsseite wechseln](#)

LUKB

SMI



[LUKB-Börsenmonitor](#)
[Finanzanalyse](#)
[Infoprodukte Handel](#)
[Portal strukturierte Produkte](#)
[Factsheet LUKB-Aktie](#)

Systemverfügbarkeit

- ☒ Printing
- ☒ Avaloq (Palu01)
- ☒ Bancomaten
- ☒ Citrix
- ☒ e-banking

[Alle anzeigen](#)

CA-Ticketsystem

[Intranet-Performance \(5\)](#)
[Services Excel \(5\)](#)
[Printer Lexmark S1 \(5\)](#)
[Frontsysteme Münzbank \(5\)](#)
[AGI-CRM Anmeldung \(5\)](#)

LUKB-Links

[Aktivkonditionen](#)
[CasaBanca](#)

Pictured: The old LUKB intranet, which was based on Microsoft CMS and SharePoint 2003.

INTRANET TEAM



Pictured: The LUKB intranet team (standing, left to right): Urs Wanner, Bernd Langkau, Pius Peter, Lars Kadner, Markus Spiekermann, Roger Baumeler, and Roger Müller; (seated, left to right): Samuel Peyer, Esther Schwarzentruher, Lars Kadner, Peter Mitura, and Rudolf Künzli.

GOVERNANCE

Ownership

The intranet is technically owned by the intranet team, which consists of three people and is part of the IT department. The communications department is responsible for content. The rest of the team's roles are outlined below:

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Intranet Committee	• Strategic intranet development • Intranet governance • Quality assurance
Intranet Administrators	• First- and second-level support: ◦ First-level support: handling issues such as misspelling and problems with the CMS that are not intranet system problems. ◦ Second-level support: Problems with the intranet system that can be handled by the administrators, such as by rebooting the system or importing new data from interfaces • Various changes • Operations and maintenance • Triage/third-level support: All issues that cannot be solved by in-house administrators but that require knowledge about the system from the developer's side (Namics) or knowledge about the com infrastructure (Swiss IT Services). ("Triage" means that the admins can judge whether it's an issue for Namics or Swisscom IT Services.)
Content Owners (Sachverständige)	• Each page must be assigned to a content owner. The company has approximately 50 content owners; they are important to the content lifecycle as they must confirm/update their content every 13 months.
Editors/Publisher	• Decentralized content publishing (approximately 60 editors/publishers)
Provider (Swisscom IT Services)	• Hosting and third-level support
Solution Provider (Namics AG)	• Development and third-level support

USERS

All employees use the intranet, but the relaunch was targeted mainly to support customer advisors. The idea was to develop a digital workplace for them, so they can easily find all the information they need for their daily work.

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	• http://intranet.lucorp.ch
Default Status	• The intranet is set as each employee's default homepage, and users have their own application icon on the Citrix client.
Remote Access	• Users can access the site remotely via a Citrix client. Employees use this option regularly when working from home.

DESIGN PROCESS AND USABILITY WORK

Deciding What to Change

The company used several research methods to inform its project decisions. "We used those methods in order to get to know users' needs and requirements and to give them an opportunity to bring in their ideas," says Samuel Peyer, Senior Consultant, Project Management and SharePoint Consulting (Namics AG). These included:

- Analysis of intranet statistics
- Visits to other companies to get insights about their intranets
- Interactive workshops with business representatives to help with the design of key features (such as navigation and product display)
- HTML prototypes derived from wireframes (using Axure) and used in functional specification workshops
- Analysis of NN/g Intranet Design Annual winners main navigation structures to help develop the intranet's high-level IA

Asking the Users

Prior to jumping into design, the team conducted an employee survey that focused on content and achieved a 60 percent response rate.

Survey Facts:

- 600 participants
- 60 percent were customer advisors and 40 percent were back office workers

Survey Results:

- 75 percent of respondents consider the intranet as important today, but see a much higher importance for it in the future
- The five most important content areas for customer advisors and back office workers were the same:
 1. Conditions/rates/prices
 2. Instructions
 3. Product information
 4. News
 5. Employee directory
- Employees want a more powerful search and want to reach relevant information with just a few clicks
- Standard presentations and project information are less relevant for customer advisors
- The existing intranet is not user friendly enough, and employees tend to create their own private document storage workarounds (such as link lists and template downloads to their own PCs)
- There is too much information, and the information is unstructured
- There are no connections/links between related documents (such as instructions, regulations, and processes)

Additional Findings:

- Content management is too complex
- News/announcements should be on the homepage
- Departments should be better represented (such as with employee photos)
- Document storage should be editable by several people—that is, the new systems should support e-collaboration in project teams
- The site should have better document search capabilities, especially to support users in locating lost documents
- Search can't find documents, even when they have been uploaded correctly

Working with Agencies

The LUKB team worked closely with Namics AG, a professional Internet and intranet service provider headquartered in Switzerland, and with Swisscom IT Services AG, which provided intranet hosting and application management.

After its existing partner, Aseantic, announced that it would no longer offer intranet support, the company invited several agencies in to pitch their services. “Namics AG won due to their in-house expertise in requirement analysis, concept, design, and implementation of the new intranet,” says Roger Baumeler, Vice President, Deputy Project Manager, Requirement Analysis. “Namics convinced us with a high-fidelity prototype (wireframes) during the pitch. They adopted the described functionalities of our rough concept and outlined them in the presented wireframes. Thus, we got a good feeling of how our new intranet could look.”

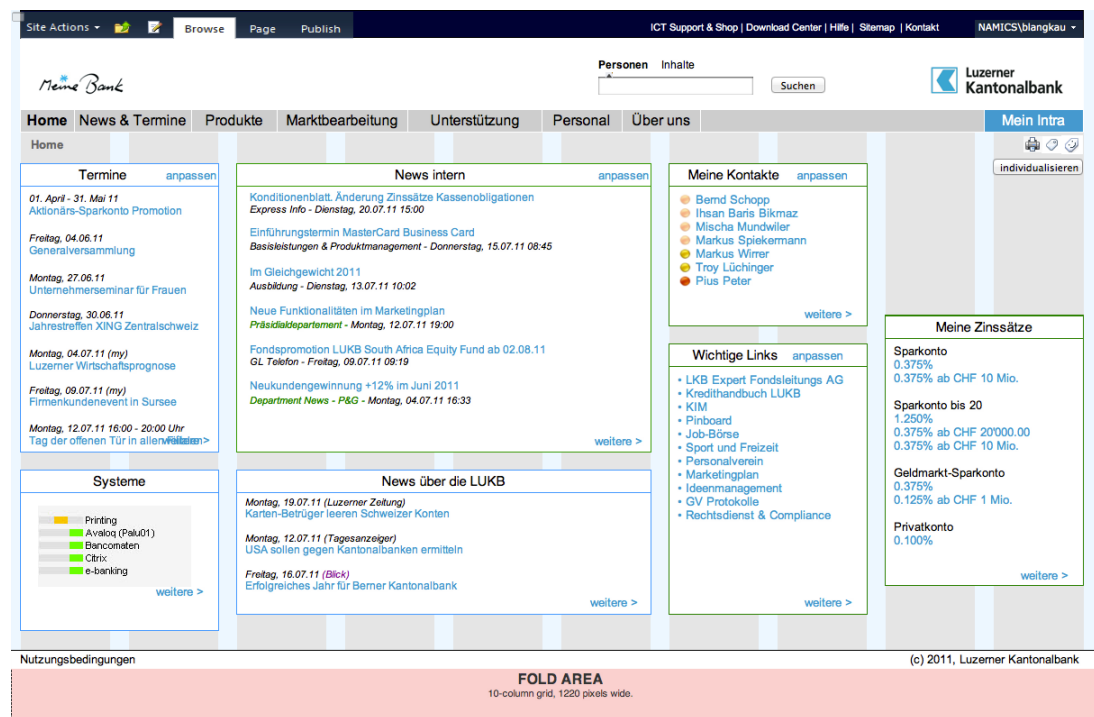
The LUKB team worked closely with Namics to develop the business concept (intranet goals, IA, wireframes, and functional specification) and also outsourced to Namics the screen design, technical specification, front-end engineering, programming, and implementation of the solution (on SharePoint 2010 and MatchPoint 3.0).

Iterative Design and Team Work

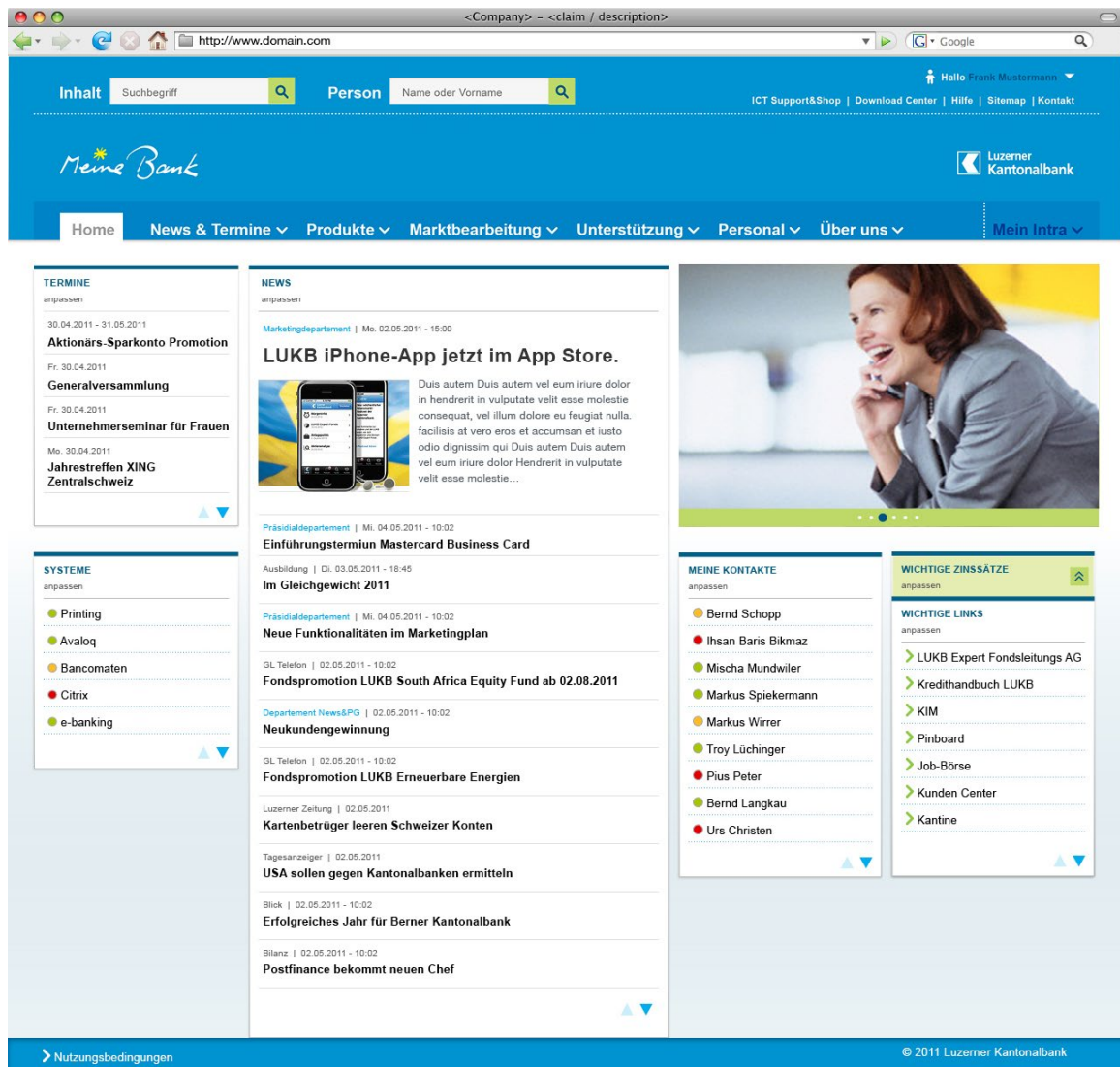
The design prototype was developed as a series of wireframes in Axure. These wireframes were used in workshops, where the team developed the site’s functional specification iteratively. This process worked very well for both teams. “The process of us (Namics) presenting different solution variations from our experience and technical background, discussing those with LUKB and finding the most appropriate solution for and together with LUKB worked best,” says Peyer.

The Namics team developed a rough concept for the pitch using the survey results and requirements list as a starting point. “Then, we tried to visualize this rough concept within a set of wireframes (using Axure) for the most important pages—such as the start page, profile page, search results page, my site, etc.,” says Bernd Langkau, Senior Principal Consultant, Program Management and Intranet Consulting (Namics AG).

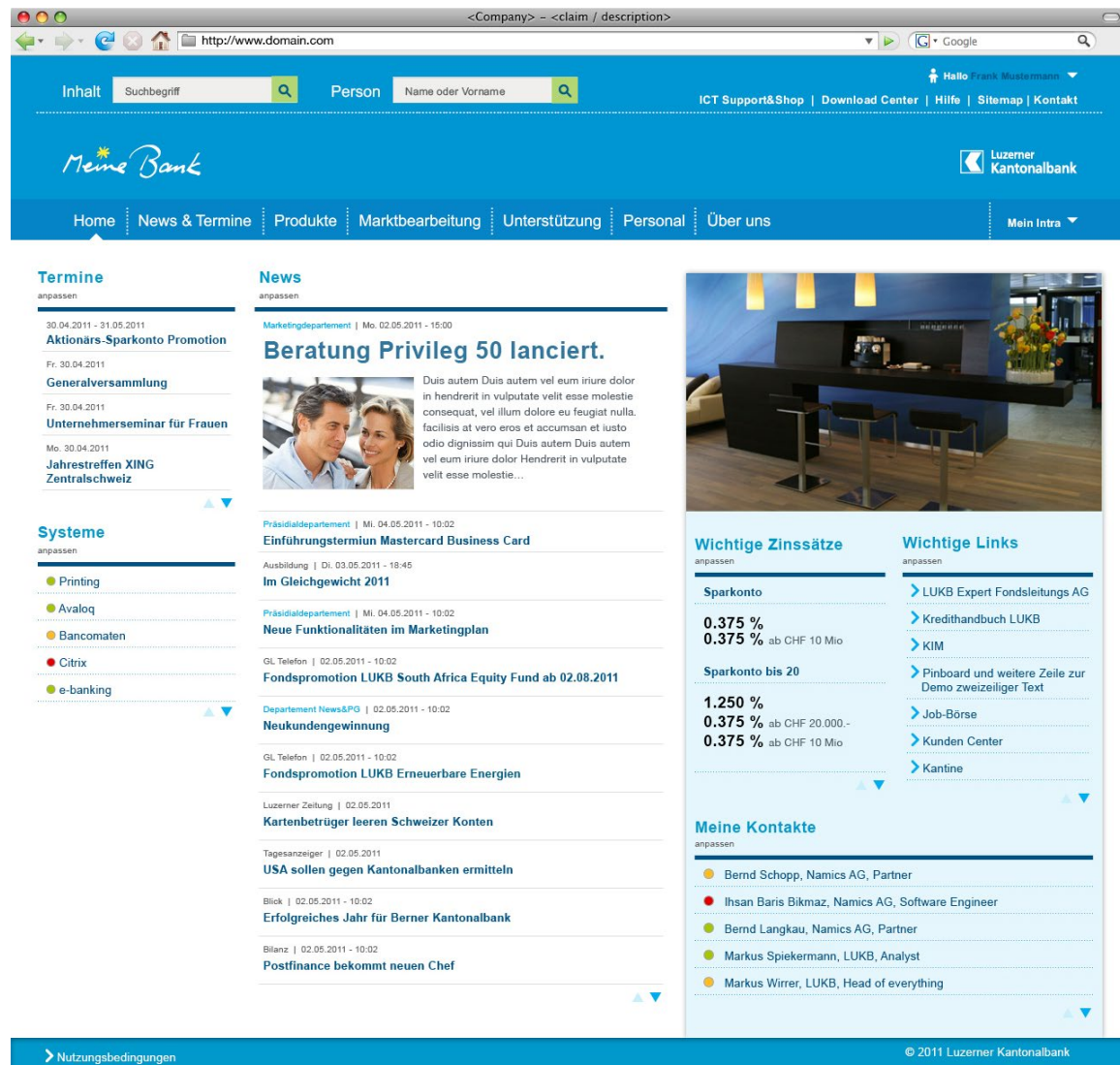
From these wireframes, the Namics team generated a clickable HTML-prototype that it could present and discuss as a basis for the new intranet. The pitch prototype gave the LUKB team a good preview of possible new functionality. The screens below show how the prototypes evolved throughout the workshop process.



Pictured: After winning the pitch, the Namics team continued to work on the concept in more detail. Over the course of eight workshop sessions, it specified the IA, topic maps, and all other functions and refined the prototype.



Pictured: Team members designed two different versions of the start page in the first design round so they could discuss each version's advantages and disadvantages and come up with a design that would combine the best elements and ideas from each.



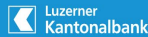
Pictured: The second version of the start page created in the first design round.

Browser: <Company> - <claim / description>
 URL: http://www.domain.com

Suchbegriff **Person** Name oder Vorname

ICT Support&Shop | Download Center | Hilfe | Sitemap | Kontakt

Patrizia Bidabul Vidal-Bettlison
Kundenberater P&G

Meme Bank  **Luzerner Kantonalbank**

Home | News & Termine | Produkte | Marktbearbeitung | Unterstützung | Personal | Über uns | Mein Departement | **Mein Intra**

Aktuelle Promotion



Aktionärs-Sparkonto Promo
19. Mai bis 31. August 2010

Termine

30.04.2011 - 31.05.2011
Aktionärs-Sparkonto Promotion

30.04.2011
Generalversammlung

30.04.2011
Unternehmerseminar für Frauen

30.04.2011
Jahrestreffen XING Zentralschweiz

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Systeme

-  Printing
-  Avaloq
-  Bancomaten
-  Citrix
-  e-banking

News

Marketingdepartement | 02.05.2011

Nach Zinsentscheid: Bernanke stellt sich erstmals den Medien

Die Fed bleibt bei ihrer lockeren Geldpolitik: Sie hat den Leitzins nicht verändert. Chef Ben Bernanke senkte die Wachstumsprognose für 2011 - auf der ersten Pressekonferenz nach einem Zinsentscheid in der Geschichte der Notenbank.

Präsidialdepartement | 02.05.2011

Neue Funktionalitäten im Marketingplan

GL Telefon | 02.05.2011
Fondspromotion LUKB South Africa Equity Fund ab 02.08.2011

Departement News&PG | 02.05.2011
Neukundengewinnung +12% im Juni 2011

GL Telefon | 02.05.2011
Fondspromotion LUKB Erneuerbare Energien

Luzerner Zeitung | 02.05.2011
Kartenbetrüger leeren Schweizer Konten

Tagesanzeiger | 02.05.2011
USA sollen gegen Kantonalbanken ermitteln, Konsequenzen ...

Blick | 02.05.2011
Erfolgreiches Jahr für Berner Kantonalbank

Bilanz | 02.05.2011
Postfinance bekommt neuen Chef

Bilanz | 02.05.2011
Microsoft zahlt Rekordsumme für Skype

Tagesanzeiger | 02.05.2011
USA sollen gegen Kantonalbanken ermitteln

Blick | 02.05.2011 - 10:02
Erfolgreiches Jahr für Berner Kantonalbank

Tagesanzeiger | 02.05.2011
Nach Zinsentscheid: Bernanke stellt sich erstmals den Medien

Blick | 02.05.2011
USA vor dem Staatskollaps

Bilanz | 02.05.2011
Informationstechnologien: Die Schweiz liegt weit vorn

 anpassen

Hier Headline zu KIM



Wichtige Zinssätze

Zahlen	Sparen	Vorsorgen	Kassenobligationen	Hypothek
Sparkonto Privileg 50			0.625 %	
			0.375 % ab CHF 10 Mio	
Aktionärs-Sparkonto			0.900 %	
			0.500 % ab CHF 500.000.00	
			0.375 % ab CHF 10 Mio	
Geschenk-Sparkonto			1.250 %	
			0.375 % ab CHF 20.000.-	
			0.375 % ab CHF 10 Mio	

 anpassen

Meine Kontakte

-  Bernd Schopp
-  Ihsan Baris Bikmaz
-  Bernd Langkau
-  Markus Spiekermann
-  von Moos-Zimmermann Claudia
-  Daniel Demel
-  Claus Medvesek

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Wichtige Links

-  LUKB Expert Fondsleits AG
-  Kredithandbuch LUKB
-  KIM
-  Pinboard und weitere Zeile zur Demo zweizeiliger Text
-  Job-Börse
-  Kunden Center
-  Kantine Tagesmenü

 anpassen

Nutzungsbedingungen © 2011 Luzerner Kantonalbank

Pictured: The final design, arrived at after reviewing the design with the LUKB team and making necessary adjustments.

TIMELINE

INTRANET TIMELINE	
Milestone Date	Milestone Description
2004	Intranet launches based on Microsoft CMS 2002 and SharePoint 2003
New Intranet	
April 2010	Requirements analysis
March 2011	Detailed concept specification
June 2011	Implementation
January 16, 2012	New intranet goes live

CONTENT AND CONTENT CONTRIBUTORS

Approximately 60 content contributors add content to the site. The editors are mainly from executive departments, such as institutional and company clients and private banking.

Although content reviews were once part of the workflow, these reviews were not considered valuable enough to carry over to the new intranet and have been eliminated. Instead, content today is reviewed by the content users of through the comments and ratings functionality available on every page.

Content contributors are trained and given a standard set of templates, which acts as an enforcement method. "We enforce standards and ensure consistency by providing training and standard templates," says Roger Müller, Deputy Head Corporate Communications, Content, Migration, and Quality Management. "Additionally, LUKB follows a pragmatic approach. In case someone (communication or web team) discovers something that isn't following the guidelines, they directly contact the author. Author information is displayed in each section."

The templates are provided to all contributors and the formatting functionality of SharePoint's rich text editor (RTE) is significantly restricted to help enforce compliance with the company's content guidelines.

Also, approximately once a year, the team provides FAQs that contain both frequently asked questions and the most commonly made mistakes on the intranet.

TECHNOLOGY

The underlying technology changed from Microsoft CMS 2002 (which had reached the end of its lifecycle) to SharePoint 2010. Using SharePoint 2010 opened up many new possibilities for Office integration, document management, and Web 2.0.

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and O/S	• Windows Server 2008R2 • Virtual Servers (4 Server Farm) • Microsoft SQL Server 2008
Bug Tracking/Quality Assurance	• Atlassian JIRA as bug tracking and issue tool for conceptual phase and development
Design Tools	• Adobe InDesign CS5
Site Building Tools	• Axure RP Pro 6 (for prototyping)
Content Management Tools	• Microsoft SharePoint Server 2010
Search	• Microsoft SharePoint Server 2010 (we use MatchPoint web parts to display search results)
Other Functions	• Colygon MatchPoint 2.0 (www.getmatchpoint.com) for Metadata Management (in addition to SharePoint)

SEARCH

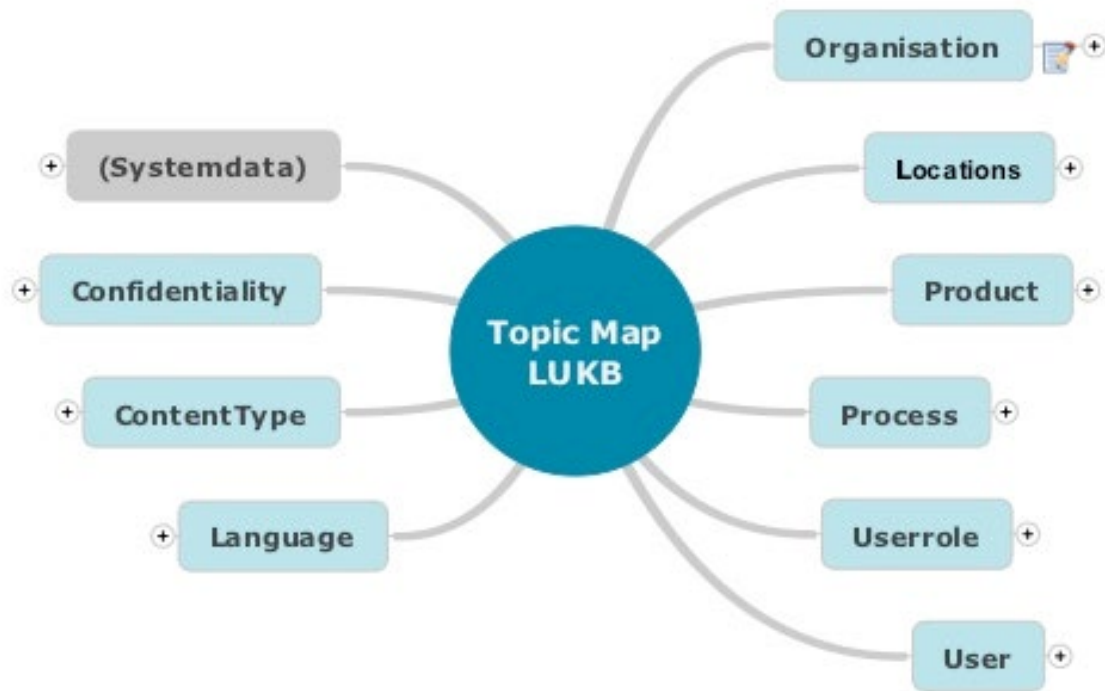
Although SharePoint search powers the intranet, MatchPoint web parts are used for input display, search results, and faceted search. The team chose MatchPoint because it met the specific requirements to combine metadata and full text search.

"The core of the intranet application consists of a sophisticated metadata concept (taxonomy)," says Langkau. "Automatic inheritance of metadata along the information architecture automatically increases data classification."

Data from peripheral systems (such as processes, instructions, and interest rates) are imported into the core data model so they can be linked with the intranet content.

"This technology has been applied, in particular, to the individual financial products," he says. "All associated terms, interest rates, instructions, processes, forms, product-specific deadlines, and affiliated products are automatically displayed with the help of the metadata. As a result, users are presented with all relevant product information without the author going through laborious manual link-up processes."

The taxonomy model facilitates efficient metadata or full text searches with refinement options (see screenshots below).



Pictured: Final version of the taxonomy model. All topics can be connected to each other.

Inhalt Person Home | Hilfe | ICT Support & Shop | Interner Notruf Peyer Samuel

Meine Bank Luzerner Kantonalbank

Home News & Termine Produkte Marktbearbeitung Unterstützung Personal Über uns Mein Intra

Home > Suche

CEO [Volltext]

Referat Bernard Kobler, CEO
LUKB, 31.01.2012 – Referat Bernard Kobler CEO Seite 1 Bilanz-Mediengespräch 2011 der Luzerner ... Geschäftsjahr 2011 LUKB, 31.01.2012 – Referat Bernard Kobler CEO Seite 4 Zinssumme stabil zu halten ...
http://intranet.lucorp.ch/news-terminenews/Documents/2012-01-31_Bilanz_MK_Referat_Bernard_Kobler.pdf - 44 KB - Müller Roger (Dki) - 31.01.2012 04:57:51

Team REVI
Auditor (CISA) Tätigkeit: Software-Entwickler, Informatik Projektleiter, CEO eines KMU im Bereich ...
http://intranet.lucorp.ch/unterstuetzung/interne_revision/Documents/Team_REVI.pdf - 207 KB - Müller Roger (Dki) - 30.11.2011 15:06:40

Leitlinien Unternehmen mit Verantwortung
Soziale Arbeit, Bernard Kobler ist als CEO LUKB Mitglied des Patronatskomitees. Der Verein strebt ...
http://intranet.lucorp.ch/personal/im_gleichgewicht/Documents/Leitlinien_Unternehmen_mit_Verantwortung.pdf - 34 KB - Schwarzenruber Esther (Zpbj)Stadelmann Jürg (Dp) - 18.01.2012 12:00:00

Besoldungsordnung
<http://intranet.lucorp.ch/personal/mitarbeiter-handbuch/Documents/Besoldungsordnung.pdf> - 53 KB - Bieri Beat (Dpc) - 09.01.2012 09:32:57

Arbeitsanweisung
MBL FTL FKUBE F ... Anlageberatung / Depotgeschäft im F ... Mit dieser Arbeitsanweisung sollen folgende ... geprägt (Eigentümer ist z.B. Alleinaktionär, CEO und Verwaltungsrat) kann auch ein BEAT -Fragebogen ...
http://intranet.lucorp.ch/unterstuetzung/arbeitsanweisungen/arbeitsanweisungen/AAW_Anlageberatungsprozess_F.docx - 43 KB - Klingler Patricia (Fa) - 06.01.2012 12:00:00

VSKB Basispräsentation
http://intranet.lucorp.ch/marktbearbeitung/praesentationen/Documents/VSKB_Standard_Praesentation_2011.pdf - 4 MB - Müller Roger (Dki)Benutzer - 16.12.2011 15:41:26

Kompetenzordnung der LUKB
GL LUKB i. Präsident der Geschäftsleitung /Konzernleitung CEO LUKB i. Mitglied der Geschäftsleitung ...
http://intranet.lucorp.ch/ueber_uns/fundament/reglemente/Documents/2010-05-03_Kompetenzordnung.pdf - 1 MB - Müller Roger (Dki)Gabriel Miriam (Px) - 22.11.2011 15:49:14

Einladung auf der Bank 2012
das er sich unter anderem als Langlauf-Nationaltrainer, als CEO der FIS Alpin Ski WM 2003 in St ... als Chef Leistungssport von Swiss-Ski und als CEO der Eishockey-WM 2009 in der Schweiz angeeignet ...
http://intranet.lucorp.ch/marktbearbeitung/kundenanlaesse/Documents/Einladung_auf_der_Bank_2012.pdf - 1 MB - Müller Roger (Dki) - 21.12.2011 09:11:55

Reglement LA-VR
einerseits der Mitglieder des Verwaltungsrates und des CEO, andererseits, unter Beizug des CEO, der Geschäftsleitung. Er beurteilt periodisch die ...
http://intranet.lucorp.ch/ueber_uns/fundament/reglemente/Documents/2009-01-01_Reglement_LA_VR.pdf - 54 KB - Müller Roger (Dki)Fischer Louis (Dr) - 22.11.2011 13:31:47

LUKB Sicherheitshandbuch
Fachverantwortung (Weisungsverfasser) DI ... Das Sicherheitshandbuch beschreibt die Sicherheitsanforderungen, die auf Basis der LUKB-Prozesse und der ... CEOLeiter Risiko und Prozessmanagement ...
http://intranet.lucorp.ch/unterstuetzung/weisungen/weisungen/1.104/Weisung_1_104_Sicherheitshandbuch_LUKB.docx - 39 KB - Wildhaber Philipp (Zpbj)Mani Jeannine (Zi) - 02.01.2012 12:00:00

1-10 (125) ▶

Trefferliste filtern

- Erstellt
 - 2001
 - 2005
 - 2010
 - 2011
 - 2012
 - April (7)
 - Februar (6)
 - Januar (14)
 - Juni (1)
 - Mai (8)
 - März (12)
- Geändert
- Inhaltstyp
 - Arbeitsanweisung (1)
 - News (11)
 - Weisung (13)
- Produkte
 - Anlagen (3)
 - Finanzanalyse (1)
- Sachverständiger
- Weisungen
 - 1.101 (1)
 - 1.102 (1)
 - 1.104 (1)
 - 4.101 (1)
 - D 1.03 (1)
 - D 1.06 (1)
 - D 1.08 (1)
 - D 5.07 (1)

Pictured: A content search results page with rich refinement (right side).

RESULTS AND ROI

The true test of an intranet's success is sometimes simply how much it is used. By that standard, the LUKB intranet is indeed a success. "Today, a lot more employees look for required information in the intranet than in other systems," says Peter Mitura, Webmaster Internet/Intranet. "Users no longer have to store information locally (for safe keeping), because now they trust that they will be able to find what they are looking for and that information will be useful.

"Our intranet is again the central information system for customer advisors," he says. "Since the redesigned intranet has been launched, almost no negative feedback has been heard. Prior to that, a lot of negative feedback was received, also from management level. Especially the search, performance, and content had been criticized."

Measuring results

The LUKB team has many impressive metrics that demonstrate how much the new tool is used, including that 800 of the company's 1,000 employees use the site each day.

Top 10 pages:

- **The six start page variations:** 130,000 views/month
- **People search:** 20,000 views/month
- **Content search:** 8,000 views/month
- **Advanced people search:** 5,000 views/month
- **News overview:** 3,000 views/month
- **Phone notice** (a light-box form linked from the people search that informs people when they've missed a phone call): 2,500 views/month
- **Organizational browser:** 2,400 views/month
- **Product pages:** 1,800 views/month
- **Open positions:** 1,400 views/month
- **Pin board:** 1,300 views/month

LESSONS LEARNED

Team members share the project's lessons learned:

- **Understand SharePoint's restrictions.** "SharePoint has some usability deficiencies—for example, in the provisioning of web parts on My Site by a 'normal'—not on SharePoint-trained—user. We did not recognize this before the implementation phase, since we did not know SharePoint well enough. Hence, Namics had to develop a drag-and-drop provisioning mechanism for web parts on My Site."
- **Start with low-fidelity wireframes.** "In the first step, the wireframes were too near to the screen design, and the intranet core team discussed too much about the design instead of the positioning and functionality of the web parts. Try also to avoid corporate colors in the wireframes to make it clear that the wireframes are not yet 'designed.'"
- **Create communication groups.** "Important concepts such as the product page functionalities were discussed in a bigger circle, with details discussed in a smaller project group. Thus, we could guarantee that the design was actually user-centered, since we understood in detail the client advisor's working procedures."
- **Involve the content authors and migration staff early.** "We started training of content authors very early—upon deployment of the SharePoint content management system, but before all start page web parts were developed. Hence, there was enough time for migration of content and testing by the authors and optimizing by Namics. This empowered us to launch an intranet system of high quality."
- **Be aware of the SharePoint user profile cache's fragility.** "Usable features like the type-ahead functionality developed for the people search require intense caching of user data. We found out that the SharePoint user profile cache is not as solid as it should be."

- **Screen designs in detail.** "We would put more focus on the design concept and would suggest going into more depth (at least three to four levels) to avoid a lack of clarity and misunderstandings."
- **Design with all of the content in mind.** "At the beginning, we would suggest to do an analysis of all different content elements before starting the screen design. Further, we suggest to not only design page types and standard elements such as search, lists, and forms, but also to design all other page elements."

National Geographic Society (2014)

Using the intranet: National Geographic Society is one of the largest non-profit scientific institutions in the world. It reaches 450 million people worldwide each month through its media, exhibitions, live events, school publishing programs, research grants, and merchandise.

Headquarters: Washington, D.C.

Number of employees the intranet supports: Approximately 1,500 full-time employees, along with numerous contractors, interns, and international partners.

Locations where people use the intranet: Washington, D.C., New York, Los Angeles, Detroit, Colorado, Chicago, London, Sweden and China

Design team: A three-person Internal Communications team led National Geographic's intranet redesign, working with Celerity's web and mobile team and the Baker Hill design agency. The team engaged stakeholders from every department across National Geographic for the initial launch and to establish a regular group of contributors.

In-house team: Keelin Vaccaro, Director of Internal Communications; Megan Seldon, Manager of Internal Communications; Christy Solberg, Visual Communications Coordinator; Russ Little, Director, Technology; Dan Backer, Director, Infrastructure

Celerity: Elisabeth Beller, Project Advisor; Drew Engelson, Technical Advisor; Susana Esparza, Scrum Master and Project Manager; John Dymond, Architect and Lead Developer; Jason Kolaitis, Lead User Experience Designer; Beshoy Louka, Front-End Developer; Ilya Lemberg, Developer; Kenneth Yu, Developer

Baker Hill: Mark Hill, Principal and Creative Director

SUMMARY

Faced with an outdated intranet and armed with data from an engagement survey of employees, the National Geographic intranet team knew employees wanted more communication and collaboration. Based on the existing survey results and more than 100 face-to-face interviews with employees, the vision for the new site, *ngconnect*, became clear: connect employees to the organization, each other, and the tools they need to do their jobs.

The team wanted to achieve these goals while reflecting a sense of the organization and its history. It was essential to the Internal Communications team that the new site reflects the DNA of the nonprofit scientific institution, with a focus on exploration and adventure, visually stunning photography, and unique storytelling.

The team, together with business acceleration consultancy Celerity and design agency Baker Hill, approached the redesign using an Agile methodology. User research played a big role in the project, with focus groups, card sorting, and user testing of prototypes, as well as continued user feedback through the review process, which occurred every two weeks.

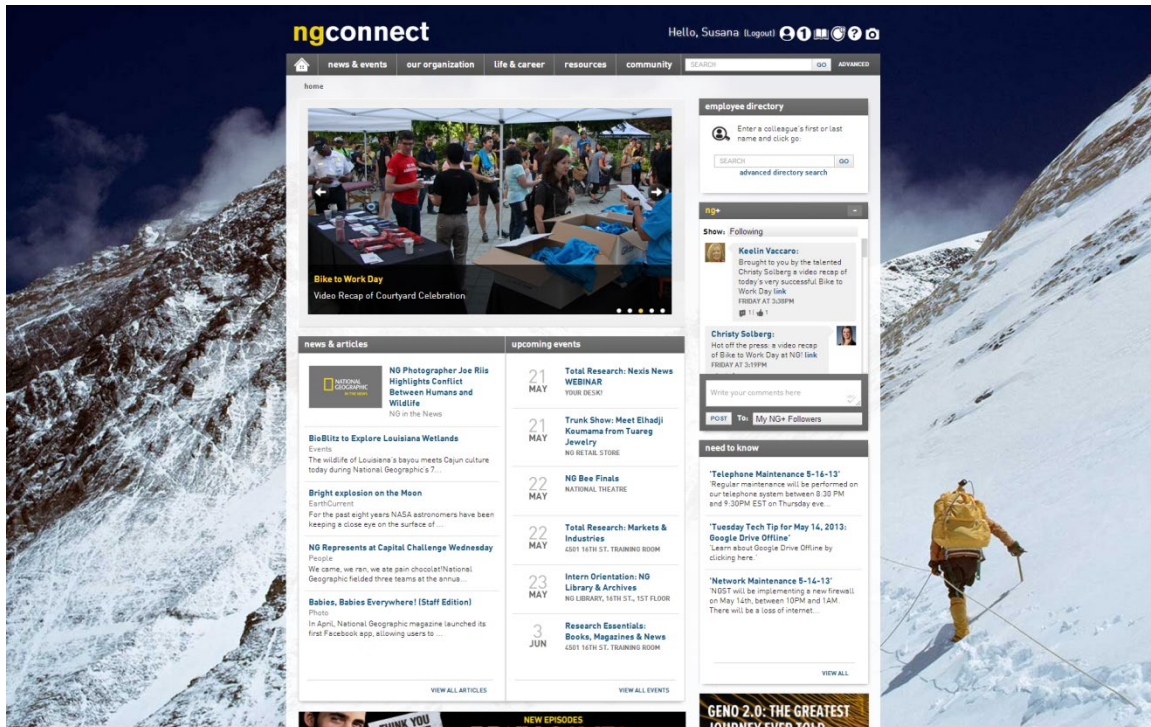
The homepage uses a carousel to highlight five news items daily. Users can page through items using arrows on the side of the carousel. News and articles are also listed beneath the carousel. Each headline is accompanied by a category (such as *Events*) or source (such as *EarthCurrent*) and part of the story's first line. Upcoming events are listed with the event name and location. Each piece of content allows users to comment on or "like" it, creating an opportunity for dialogue.

The *Employee Directory* appears in the top corner of the page. Users can enter an employee's first or last name or do an *Advanced Directory Search*. A feed from the site's custom-built social tool, *ng+*, is listed beneath, showing employee information from those they are following. Employees can comment on items directly from the

feed and select which groups should see the comment (such as posting to all followers or only certain groups).

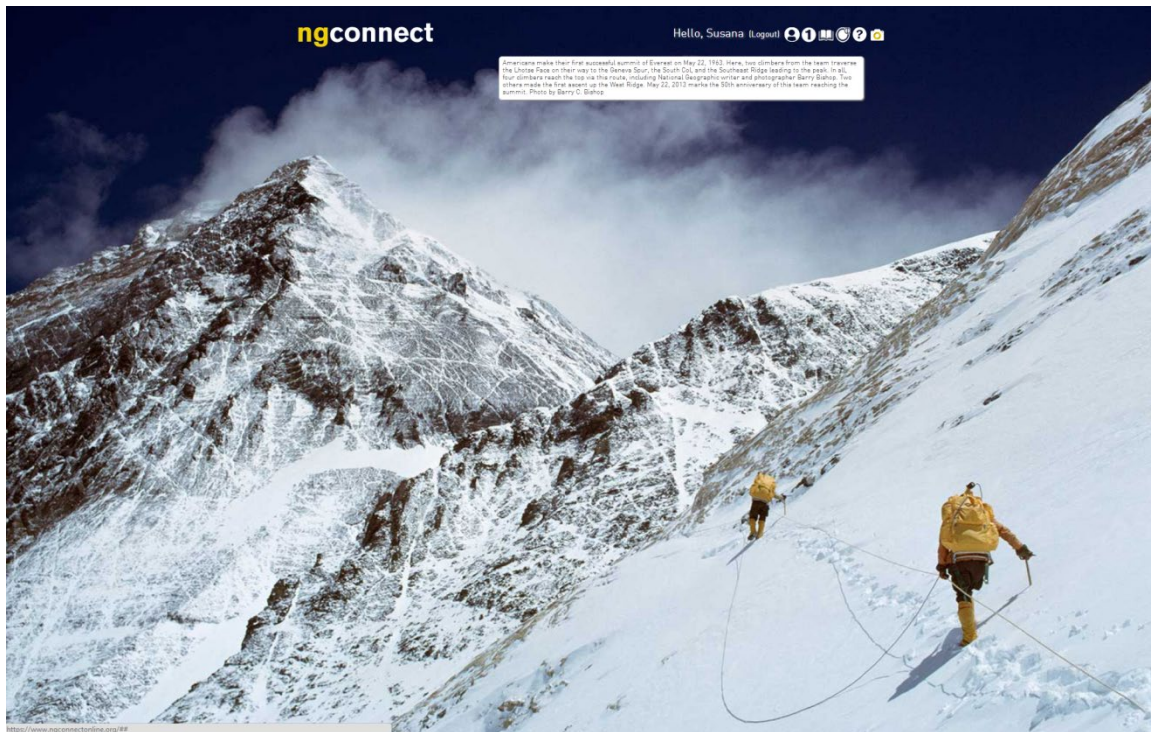
The homepage also includes several other features: the *Need to Know* section has important operational content, such as maintenance work and technology tips; promotional banners advertise upcoming National Geographic programming or employee events; and the *Most Popular* content menu displays how many users have either viewed or “liked” a piece of content.

Icons at the top of the screen give users quick access to notifications, their employee profile, Portal 1, the library, Okta, SSO, help, and also background image information. These links are available throughout the site.



The homepage highlights news, events, and updates. Users also have quick access to the *Employee Directory* and ng+, the site’s social tool.

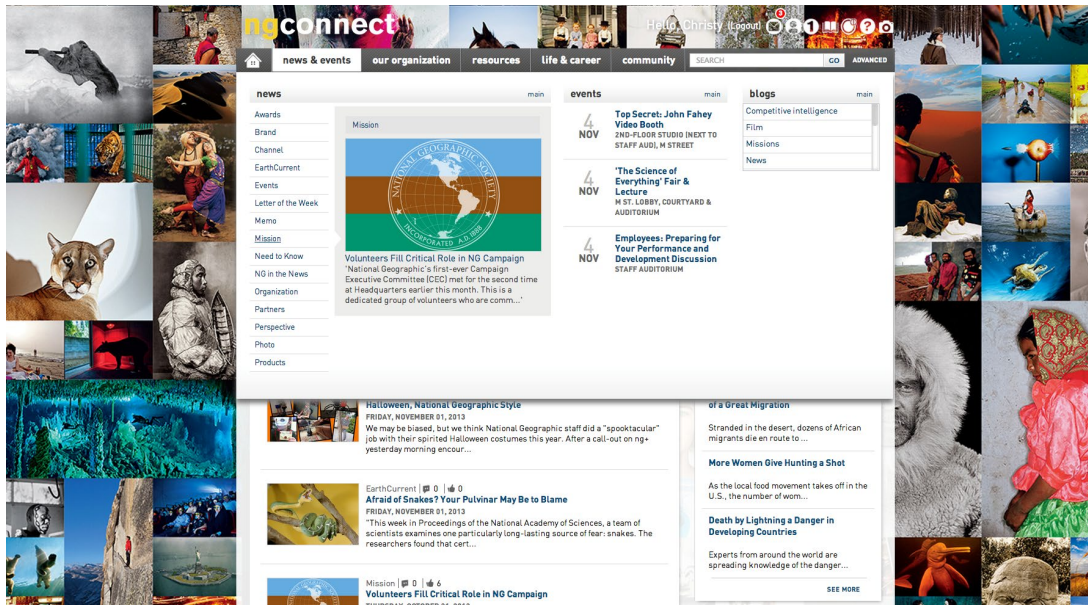
The site uses a big image background, drawing on its rich history as a scientific institution with incredible photography. The images, which change monthly, are chosen to reflect current events or significant milestones in the organization’s 125-year history. Users can “close” the content of the site to reveal the full screen image, complete with a caption, by clicking on the camera icon in page’s the upper right-hand corner.



National Geographic's expansive and impressive photo library is put to good use on the site. Images act as a backdrop to the site, and users can click the camera icon in the upper right-hand corner to see the full photograph and its caption. The image above shows the first successful summit of Mount Everest by Americans in 1963.

To help users navigate the site, megamenus provide quick access to information. The previous site structure had grown unmanageable over the years. The team used card-sorting exercises to create navigational categories, but user testing was essential to creating the final design. In testing on prototypes, the team found that users had a hard time using the large menus, becoming overwhelmed by the number of choices. The users also had issues with the timing of the hover states on the menus: users were accidentally triggering them, and then finding them hard to close. The team used these testing results to streamline the options presented to users and to change the timing to improve performance.

The menus list subsections within categories as well as highlighting pieces of content. For instance, the *News and Events* menu highlights key content from each section area, upcoming events, and links to key blogs available on the site.

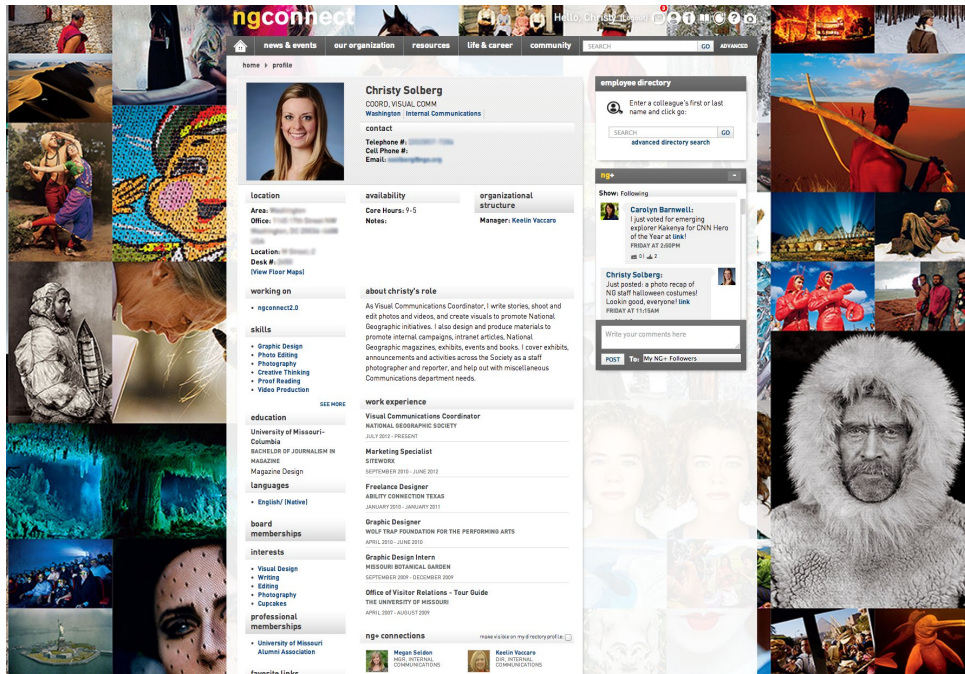


The site's megamenu list subcategories of content, but also surface important information in each site section. Events and a list of blogs round out the content in the menu. The main image changes depending on the selected news category.

The *Employee Directory* underwent a transformation, with the goals of providing standard contact information as well as helping employees get to know their colleagues by searching shared skill sets or current projects. Profile information includes current projects and connections to other employees. The *Employee Directory* pulls data from two internal systems, but also allows employees to pull in data from their LinkedIn profiles (via an API).

One of the main reasons employee directories often suffer on sites is a lack of employee participation in filling in or maintaining their own data. The team realized this, so use LinkedIn as a shortcut for providing that data. Users can simply log in to their LinkedIn profile and import information into the intranet *Employee Directory*. The team also encouraged employees to upload photos to their profiles by hosting special staff photo days aimed specifically at taking profile photos.

The employee search is highlighted on the site's homepage and is always available via the site search on every page. Users can search for colleagues by name or by keyword, to help people find one another when they have a topic—rather than an individual—in mind.



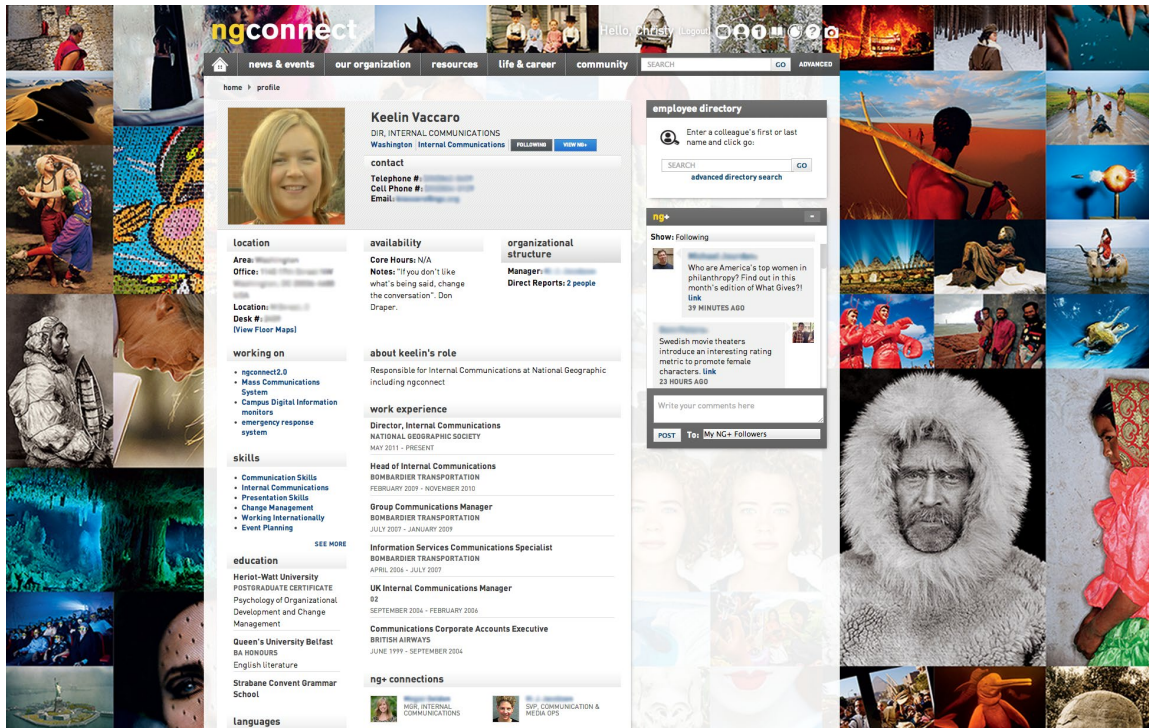
Employee profiles list essential contact information at the top, along with key details such as availability and place in the organizational structure. The side of the page lists current projects, skills, education, languages, board memberships, interests, professional memberships, and favorite links. The center of the page allows for a personal statement about the employee's role, a list of past work experience, and, finally, a list of the employee's connections on the site's social network tool.

The greatest stride toward connecting employees was the addition of ng+, a custom-built internal social tool. The ng+ tool combines what the team considered the most useful and relevant elements of four popular social tools: LinkedIn, Twitter, Facebook, and Google+.

With ng+, users can microblog, posting short updates about their day or work; ask questions; and share useful or interesting info with their network. The tool uses a connection approach similar to Twitter, where "following" doesn't have to be mutual. Further, the team recognized the need for some groups—such as Human Resources, The Green Team (sustainability), Technology, and Internal Communications—to be able to broadcast messages; these messages appear in everyone's feed.

One of the ways the team encouraged employee interactions on the new site was to ask senior management to microblog about important meetings, travel, and organizational developments, as well as to use their microblogs to recognize good work and achievements. Employees are often more willing to participate in social areas of intranets when they see senior leaders posting or commenting; such posts indicate that the organization sanctions this new way to communicate.

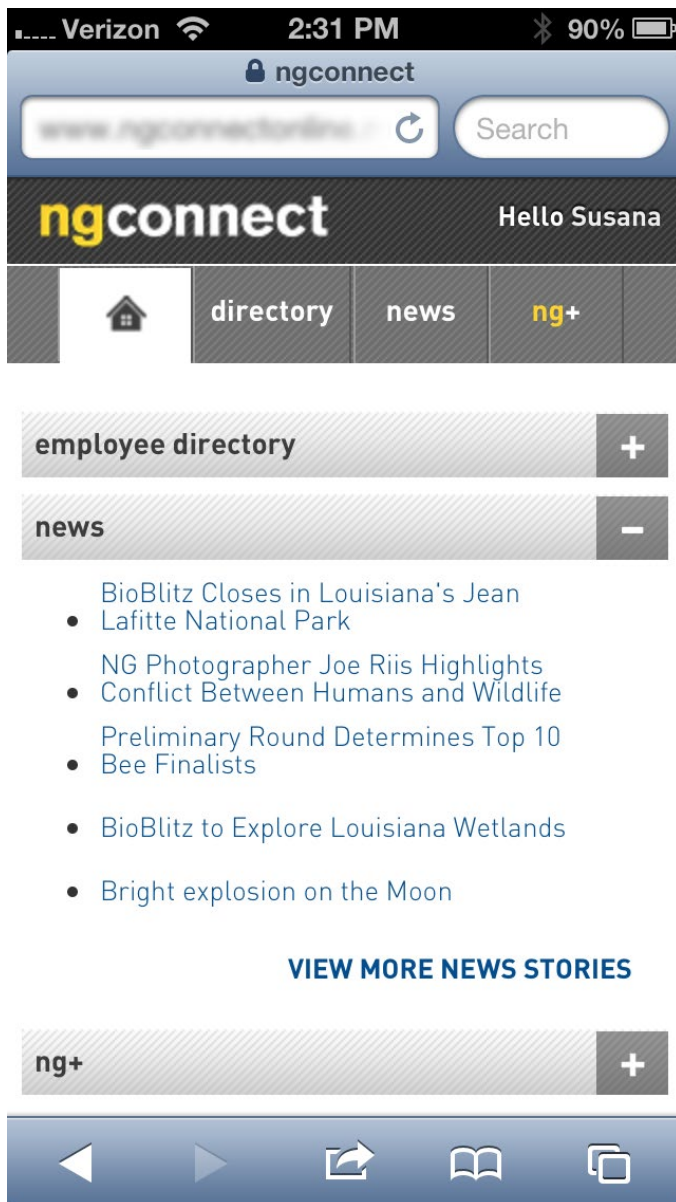
Currently, about a quarter of employees are actively using ng+ for sharing information or asking questions. More than half of employees have commented or liked a post.



The notifications feature has increased the overall ng+ tool adoption. The team introduced the notifications feature after launch, following feedback from employees who wanted some sort of prompt when co-workers in their network had commented on or liked their posts. The feature also notifies employees when transactions such as travel expenses require approval.

A version of ngconnect is available for mobile users, focused on delivering only the key information needed by users on-the-go. The team realized that mobile use might mean use in a remote location, or use when traveling between buildings on the organization's main campus (in Washington, D.C.). The mobile site offers the *Employee Directory* news, and access to ng+. Staffers have used the social aspect of the mobile version to post remotely while at off-site conferences or traveling on business. Although web-based, the site is optimized for iOS and Android use, incorporating swipe gestures and page transitions.

For the mobile intranet, the team focused on key content and quick page loads; news stories, for instance, do not include photos.



The mobile version of the site focuses on three key areas for mobile users: news, the *Employee Directory*, and ng+, the site's social tool. The mobile experience is focused on keeping employees informed (through the news), connected (through ng+) and in touch (via the *Employee Directory*).

With the robust ng+, which is integrated throughout the site and its mobile version, the National Geographic intranet team went beyond a site update to create a tool that supports new methods of communication throughout the organization.

BACKGROUND

The redesign of National Geographic's intranet began with an employee engagement survey conducted in 2009. This survey revealed an overall theme: Staff wanted communication and collaboration across the organization to improve. And, as one of

the main channels for employee communication, the intranet redesign was one of the specific suggestions put forward by staff to help meet this need.

A working group of employee volunteers from across National Geographic then took a deeper look at three issues: what employees wanted to see in a new intranet, best practices across the intranet world, and what resources would be required to develop such an intranet. The working group presented their findings to National Geographic's senior management team, which gave the go-ahead for the redesign and allocated a budget and the necessary resources, including hiring an Internal Communications director to lead the project.

"One of our first steps was to define a core vision for the new intranet," says Keelin Vaccaro, Director, Internal Communications, National Geographic, "which came after reviewing all existing employee research, as well as conducting face-to-face interviews with over 100 employees who represented all areas and levels of the organization.

"This was also a great help in beginning to define site requirements," she says.

The vision for the project was clearly defined: "Connect employees to the organization, each other, and the tools they need to do their jobs."

Of equal importance was designing the site so that it conveyed the organization's brand attributes of exploration and adventure through stunning photography and unique storytelling, while also making it intuitive and functional.

INSIDER

[Home](#)
[Directories](#)
[Submit Info](#)
[Forms](#)
[Resources](#)
[Divisions](#)
[Libraries](#)
[NG.com](#)
[For Me](#)
[HR](#)
[Calendars](#)
[Portal 1](#)

Monday, May 20, 2013

Editor's Pick:

National Geographic News & Reports

Headline Goes Here

Environment

GLOBAL WARMING NATURAL DISASTERS HABITATS GOING GREEN

Going Green

What Can You Do to Live Ecofriendly?

GET TIPS

FEATURES 1 2 3 4 5 6 PAGE

This paragraph will talk about the new environment page that the digital media folks set up. You can go to the page by clicking on www.green.nationalgeographic.com

This paragraph will link up to the Perspectives piece that Guadalupe Lucero wrote. Here she is standing in front of a pink building. Wow!

Memo Establishment of Society-Wide Digital Product Management Group Memo from Declan Moore & Amy Maniatis (12/12/2012)

News Leading the Charge for Mission 2015 (11/20/2012)

Communications

Press Room

PR Boilerplates

Submit a Question

Week in Review

Insider Blogs

John Fahey's Blog Updated

Internal Values (background context)

Future Directions

Insider Redesign

Internal Communications

Learning and Development

Rethinking Office Space

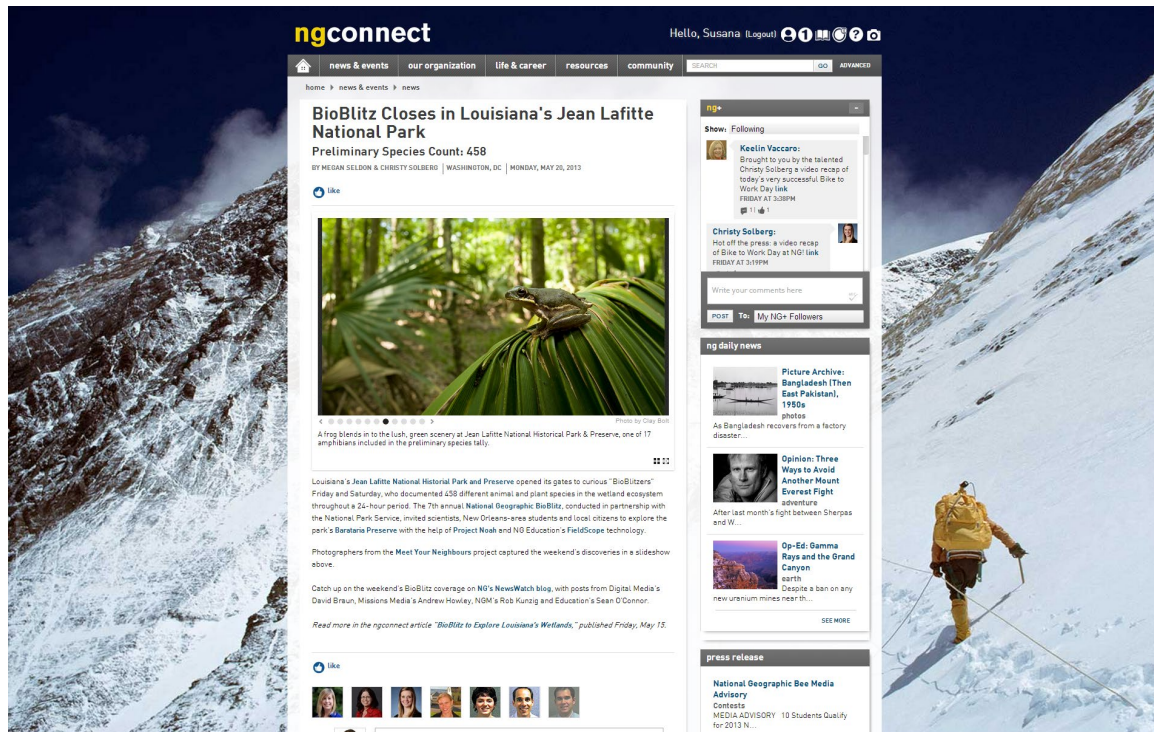
Technology Council Updated April 5th

Opportunities [More](#)

The one-stop source for answers to questions about services.

The one-stop source for answers to questions about services.

The old National Geographic intranet design, which was a winner of the NN/g 2007 Annual Intranet Design Award.



A sample news story on the redesigned site has an optional image carousel at the top of the page, followed by the article body and opportunities for users to "like" or comment on the article at the bottom of the page.

ngconnect

news & events | our organization | resources | life & career | community

home > community > ng+ > groups

ng+ Groups

Share with Important Groups

Join an established Society group or create your own to connect with colleagues on work or personal interests. We've created a list of groups to get everyone started, but this is only the beginning! Remember, groups are open to the entire Society.

christy solberg
View My Profile

streams

People I Follow
My Posts
FILTER BY
Select A Circle
Select A Group

manage

Select A Circle
Manage Groups
Create A Circle

All Groups (31) | My Groups (11)

type: All

search: SEARCH HERE SEARCH

Groups	Members	Status
Actionable Analytics business and industry intelligence Be in the know about what's going on our website via analytics! Learn about what's new with analytics, gain insights into our digital traffic and engagement, and share lessons learned/best practices from A/B testing.	30	FOLLOW
Amazing Everything Kids Group business and industry intelligence Cross-divisional team working on everything related to kids -- sharing innovative ideas, research, and resources to quickly & nimbly meet our Mission 2015 goals.	64	UNFOLLOW
Animal Lovers ng community Share animal and pet related news, events, etc.	39	FOLLOW
Bike to Work Day 2013 ng community Register for the NGS pit stop, create convoys with your co-workers, find new routes, chat about the new bike lanes in DC	10	UNFOLLOW
Cafeteria Groupies ng community Get the inside scoop on the latest Cafeteria offerings.	72	FOLLOW
Closer Looks missions Presenting the work of NG Grantees in the field.	95	FOLLOW
CTO Directs technology Testing the new microblog feature of ngconnect.	5	FOLLOW
Daily News Junkies	71	FOLLOW

One of the intranet's social and community-building features is the *Groups* page, where employees are encouraged to create and self-manage various group pages related to their work and outside interests.

INTRANET TEAM



The ngconnect team (front row, left to right): Drew Engelson (Celerity), Megan Seldon (National Geographic), Keelin Vaccaro (National Geographic), Christy Solberg (National Geographic), Susana Esparza (Celerity), and Kenneth Yu (Celerity); (back row, left to right): Elisabeth Beller (Celerity), Russ Little (National Geographic), Beshoy Louka (Celerity), Mark Hill (Baker Hill), John Dymond (Celerity), Dan Baker (National Geographic), and Jason Kolaitis (Celerity).

GOVERNANCE

Ownership

National Geographic's Internal Communications team oversees ngconnect's strategy, day-to-day operation, and content. Members of National Geographic's Technology team are also involved in supporting Help Desk inquiries from staff and the infrastructure that ngconnect is built on. Although Internal Communications might be the "owner" of ngconnect, content contribution is encouraged from across the organization, and the team believes that this will be key to sustaining the intranet in the years to come.

"Internal Communications' overall stake in the intranet has been a positive opportunity," says Vaccaro. "As communicators, it has allowed us to make the site more engaging through visual and dynamic design and content.

"As owners of the intranet, it has also helped establish the relatively new Internal Communications team and its work across the Society," she says. "The scope of ownership is much greater than in years past, since we now maintain all content across the site."

One challenge has been that, at certain points, the Communications team found itself tasked with making decisions related to data or technology, which Vaccaro says doesn't naturally fall within the team's core area of expertise. "The solution for this has been to partner with an external vendor who has that expertise, and pull support from other areas within the organization—such as the internal technology team—when we can," she says.

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Internal Communications Team	• Intranet strategy • Budget management • Coordination of internal and external technology resources • Maintaining content quality across site • Publishing daily homepage content • Training and support for content contributors • Post-launch enhancements • Setting and maintaining style and editorial guidelines
Content Contributors	• Creation and maintenance of department/division/universal content • Creation of timely news and event posts
Technology Team	• Maintenance and monitoring of Ektron CMS and servers • Tier 1 support/Help Desk inquiries from staff
Celerity	• Post-launch development • Site maintenance • Troubleshooting CMS or front-end issues

USERS

The site is designed for all of National Geographic's employees, international partners, channel partners, and contractors. The type of work performed at National Geographic varies widely, with hundreds of different roles supported by the intranet within this diverse organization. Example roles include producers, graphic designers, editors, researchers, managers, interns, and writers.

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	ngconnectonline.org (web and mobile)
Default Status	The Technology team sets each new employee's homepage as ngconnectonline.org, but employees have the ability to change it.
Remote Access	Users can access ngconnect remotely through ngconnectonline.org, which prompts them to enter their username and password to authenticate themselves through the Okta single sign-on service. National Geographic encourages teleworking, and users regularly access ngconnect off-site, whether in D.C. or at one of the organization's satellite offices.

DESIGN PROCESS AND USABILITY WORK

Design Approach

The key to getting an intranet project done on time and within budget is to not let the perfect be the enemy of the good. Although every team strives to do its best work, perfection is rarely within reach. "We tried to follow the typical User-Centered Design (UCD) process as best we could," says Jason Kolaitis, Lead User Experience Designer, Celerity, "but in reality, due to timelines and budget constraints, following the process to a 'tee' is pretty difficult. Luckily, we were able to accomplish the majority of UCD tasks in order to create a highly successful intranet design."

Kolaitis says they built the intranet around the core needs of the end users. "We didn't try to build something we *thought* users might need," he says, "we built something we *knew* users needed." Using one-on-one interviews, focus groups, card sorting, content inventories, and a lot of web research, the team was able to create an intranet that filled a void for many National Geographic employees.

The design process kicked off with the team interviewing stakeholders and employees and completing a baseline review of the existing intranet to get an understanding of what already existed, and where the site needed to go for the future. Overall, the team found that users were mostly happy with the information on the site, although it was clear that it needed a visual refresh and that the site's IA—which had grown organically for several years—was no longer manageable.

Minimal analytics data was available to analyze traffic patterns and frequently used content, so the team decided to perform focus groups with end users; this would let the team dive deeper into key business issues, desired intranet use, and important integration points. The result of these efforts was a set of prioritized features that would help employees accomplish their jobs, including:

- *Employee Directory* with enhanced profiles (with self-service capability)

- Organization chart
- Generic and customizable quick links
- Basic enterprise calendar capability
- Social capabilities (blogs, micro blogging, and classifieds)
- Robust search
- Single sign-on
- Online form submission capability
- Mobile access (with highest priority on the *Employee Directory*)



This parallax scrolling microsite on the *History and Heritage* page showcases the history of National Geographic in a fun and engaging way.

Developing the Information Architecture

The new IA was achieved through a series of online card-sorting tasks (to iron out and finalize the new site map) and by developing and testing a series of clickable prototypes (using Axure RP).

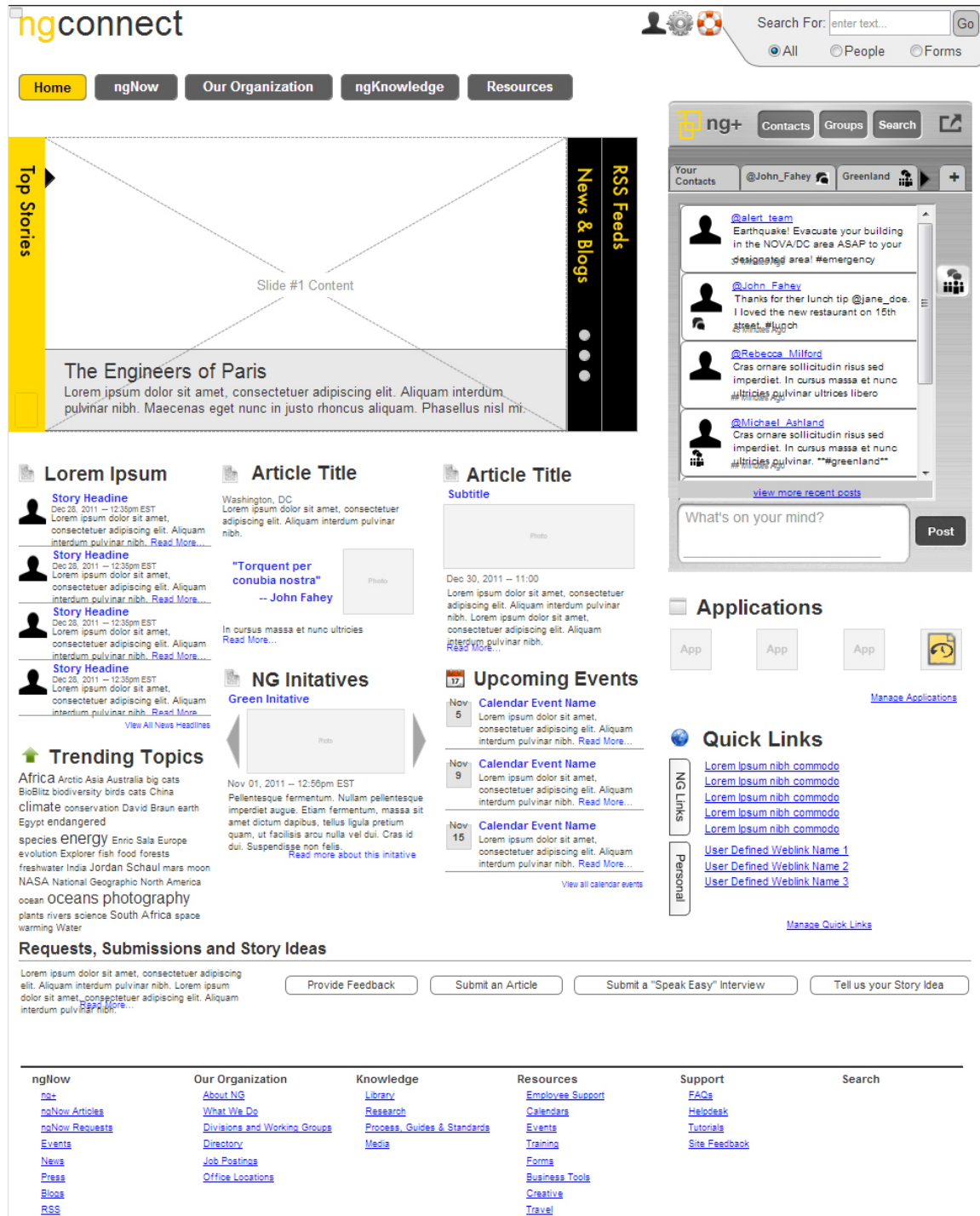


The proposed high-level site structure.

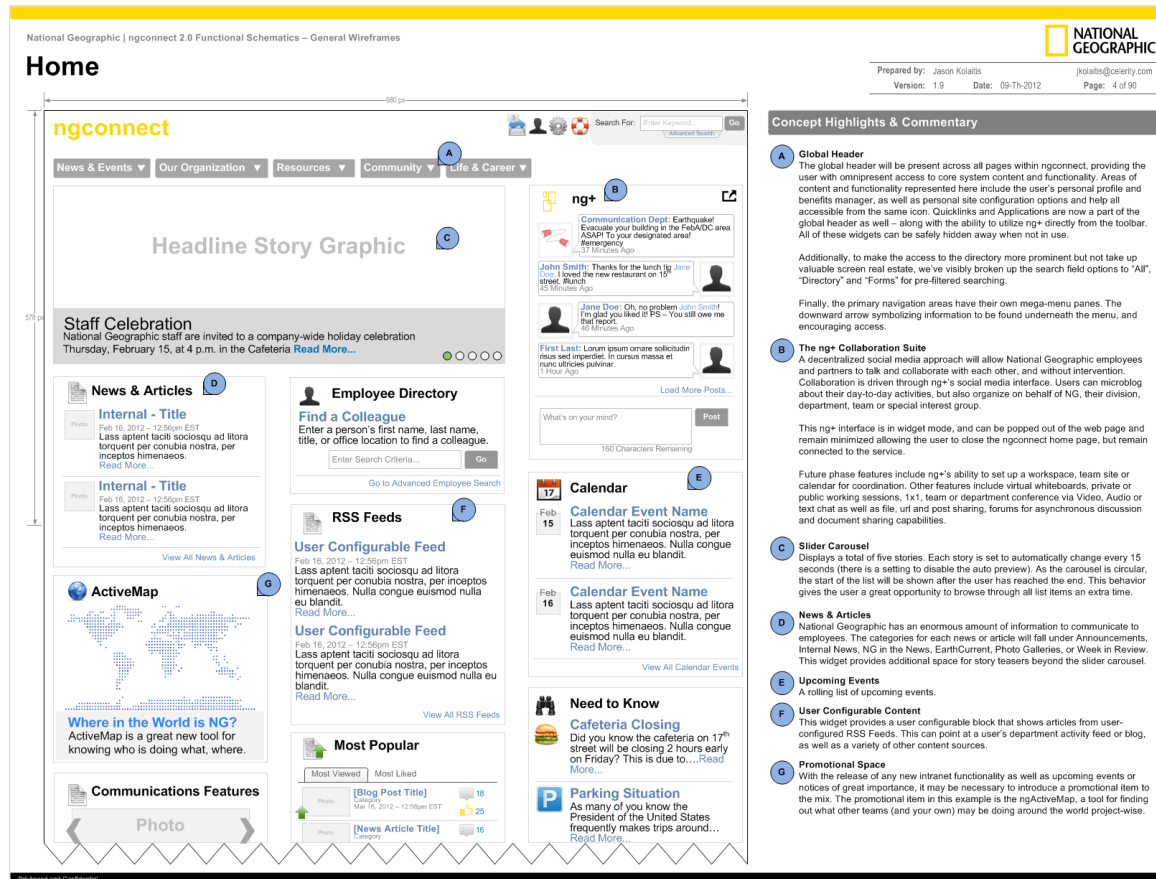
"Overall, the tests went well, but we were surprised to find out that users had extreme difficulty using the megamenu we originally designed," says Kolaitis. "The 'on-hover' states for the megamenu caused significant problems during the tests, as users weren't able to easily close them, and anytime the user's cursor crossed through the navigation bar the menus accidentally appeared. We clearly needed to fine-tune the delay for these interactions."

This was one of the team's primary takeaways from the usability testing.

Also, says Kolaitis, users experienced information overload and were overwhelmed by the amount of content in the menus. "So, in the final design, we also reduced the amount of content in the menus and only surfaced the most popular content," says Kolaitis.



The initial Axure clickable prototype.



Homepage wireframes for ngconnect.

After the initial discovery and conceptual design phase, the team began designing the remaining templates and the site's core functionality. This process and the rest of the project followed an Agile methodology, which let the development team review and demo its progress every two weeks to both the core user team and stakeholders. It also gave the team an opportunity to get regular, direct feedback from users.

Working with Outside Agencies

National Geographic partnered with an outside consulting firm, Celerity, to provide a full end-to-end solution including discovery, strategy, platform selection, user experience design, and development.

One of the core reasons for engaging an outside technology vendor was that the organization wanted to bring a platform-agnostic viewpoint to the table during these early project stages. Ultimately, the new intranet's chosen platform had to fit with National Geographic's technology strategy; however, at that stage, the team didn't want to limit itself to considering only platforms supported by internal expertise.

The organization also worked with D.C.-based design firm Baker & Hill to develop the intranet's visual design concept.

These outside agencies were tightly integrated into the design process, working side-by-side with National Geographic's internal resources.

"Our relationship with each agency was to work with them as a team," says Vaccaro. "It was clear that National Geographic owned the product decisions, but at times relied on Celerity's expertise in website design and development. During the initial stages of the project, the Celerity team worked onsite for several weeks at a time at National Geographic's HQ, which created a positive and productive team environment."

Once the development sprints began, Celerity's development team worked offsite and interacted with the National Geographic team through daily Scrum calls and periodic onsite demos and meetings. Celerity's project manager was onsite regularly, while the rest of the team worked onsite as needed.

TIMELINE

The overall redesign time frame was 16 months from discovery to launch.

INTRANET TIMELINE	
Milestone Date	Milestone Description
December 1999	Original company intranet, Inside NGS, launched
March 2006	Redesigned NG Insider launched (winner of NN/g Intranet Design Annual 2007)
September 2011	Homepage facelift (v. 1.0) to support a more visually appealing experience pending upcoming redesign
September–December 2011	Discovery and design phase, including usability testing with prototype and platform selection in preparation for 2.0 redesign
Late January–February 2012	Environment and tools/systems setup, Agile education, and ngconnect 2.0 project kick-off
March–mid December 2012	Development, testing, training, and content upload for new intranet site
December 14, 2012	Launch of ngconnect 2.0
January 2013 to date	Continuous improvements through small and iterative enhancements based on user feedback; changes so far include improved search, enhanced social tools, and an image gallery
July 2013	A survey and usability testing conducted to assess ngconnect 2.0 success and room for improvements

CONTENT AND CONTENT CONTRIBUTORS

Choosing a Platform

To identify the best platform for National Geographic's content management needs, the intranet team had to understand, at a high level, the different types of functionality the organization required. So, team members looked to the findings from their discovery efforts, including stakeholder interviews and focus groups, and also reviewed the technology landscape.

According to Susana Esparza, Scrum Master and Project Manager, Celerity, this process resulted in the identification of three types of tools:

- Web content management tools
- Portal technology (providing a single point of access for applications, information, data, and processes)
- Enterprise social and collaboration platforms

To reduce the number of platforms to review and demo to a manageable quantity, the team focused on 10 criteria:

- Core functionality/built-in applications
- Content management (authoring, publishing)
- Search
- Light document-management capabilities
- Portal/personalization capability (such as the ability to customize dashboard with widgets and display data from other systems)
- Social media (such as wikis, blogs, community features)
- Flexibility/customization (in terms of the platform)
- Scalability/performance
- Ease of implementation and ongoing maintenance
- Intuitiveness/ease of use (for both end users and content contributors)
- Interoperability with other systems
- Price
- Strategic fit (in terms of product direction and/or National Geographic's vision)
- Vendor stability and/or open source community support

With these criteria in mind, Ektron emerged the winner. Overall, Ektron performed best against the criteria listed above and met most of the high-level requirements gathered during the design phase via a fit-gap analysis. "Ektron also did a very good job by demonstrating how their product was able to complete task-based scenarios provided to them by the ngconnect team," says Esparza.

Content Authoring

National Geographic's Internal Communications team maintains most of the general communications content. However, the site was designed to support distributed content ownership so that authors throughout the organization can easily update and maintain their content. Across the site, divisional and functional content is owned and developed by the respective teams, while more global/shared content—such as events, news, and resources—are managed by a select group of individuals assigned to represent their division/function within the organization.

ngconnect has various groups for content ownership, depending on the site section. Following is a list of the groups and the number of content owners in each:

- Alert authors: 3
- Blog authors: 20

- Department authors: 83
- Events authors: 27
- Life/career authors: 16
- News authors: 23
- Resources authors: 27
- Sustainability authors: 4

Approximately five contributors work actively on content on a day-to-day basis, updating dynamic elements such as news and events. For other content, such as departmental pages and resources, content is updated weekly, monthly, or as needed.

Through the ng+ social tool, intranet users can also contribute to the site regularly via comments, posts, “likes,” and shares. This opens information sharing and content ownership to the entire user population.

Templates and Guidelines

The organization has a light editorial approval chain in place. All homepage headline news is approved through the ngconnect team. Contributors who have received training in ngconnect’s editorial guidelines create content for other sections.

Templates help order and structure the content. Several templates were created to allow content contributors to create their own site sections and subsections. Some templates address specific needs (for example, the *Bio* page template) and some simply offer authors different layout options. In addition, editorial guidelines and a content checklist (see the excerpt below) were created to help authors with tone, voice, style, and images as they create their pages. The main content contributors for each department have also received an in-depth classroom training session on editorial guidelines.

Editorial Guidelines: Checklist

Tone & Voice

- ☐ Conversational and engaging; relevant; energetic and exciting

Organizing Content

- ☐ The most important points are presented in the first two paragraphs
- ☐ A short one-paragraph summary is presented to sign-post content
- ☐ Paragraphs are short (40 to 100 words)
- ☐ Key page elements are visible through Q&As, bulleted lists, bolding etc.
- ☐ Descriptive hyperlinks tell readers WHERE they are going

Writing Content

- ☐ Sentences are short and written in active language
- ☐ Content is written in second-person
- ☐ Explanations are provided where needed
- ☐ Hyne, buzzwords, jargon, business "talk", idioms, ambiguity etc. are avoided

[An excerpt from ngconnect's editorial guidelines checklist.](#)

In addition to the editorial guidelines, content contributors are always welcome to review their content with the Internal Communications team. "Within the CMS, we provide a few tips on the content entry form as reminders to ensure standards and consistency. We are also planning an annual audit of content," says Megan Seldon, manager of Internal Communications.

Training

In preparation for the new intranet's release, the ngconnect team conducted train-the-trainer sessions with key contributors across the organization. These sessions were focused on the different types of content owners (such as news authors, departmental page authors, and document owners) so that the training would be effective and in context with what authors would own and be responsible for creating and maintaining.

"Through this method, we established a mechanism in which contributors are able to teach others as changes in the organization happen, and allow for this training to grow organically," says Esparza. "The intranet implementation team also created training material for the various sessions for future reference."

TECHNOLOGY

"ngconnect was built as a gateway platform that can easily integrate new systems and feeds" says John Dymond, Lead Architect and Developer, Celerity. "This will allow for flexibility should the organization decide to change the systems it interacts with. It also allows for new systems to be plugged in without changing the programming of existing systems."

In an effort to save users time, the site uses single sign-on, which gives users fewer passwords to remember, helps reduce phishing, and improves the overall user experience. Users no longer need to first sign into a VPN, then sign into the intranet, and then sign into their department's Google Site.

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and O/S	• Web Server: 16GB RAM/50GB hard drive • Database Server: 8GB RAM/500GB hard drive storage • Search Server: 16GB RAM/250GB hard drive storage • Dev/Staging Servers: 2GB RAM/60GB hard drive • All Servers run under Windows Server 2008 R2 Standard (64-bit) SP1 and have Intel Xeon CPU X5650 at 2.67GHz/2.66 GHz (2 processors)
Bug Tracking/Quality Assurance	• BugHerd (http://www.bugherd.com)
Design Tools	• Adobe Photoshop • Microsoft Visio 2010
Site Building Tools	• Visual Studio 2010 • Team Foundation Service
Content Management Tools	• Ektron CMS Version 8.60 SP1
Search	• Microsoft Search Server 2010
Other Functions	• Integrates with Okta SSO • Integrates with Oracle PeopleSoft • Uses Gigya to import employee information from LinkedIn

MOBILE

The ngconnect mobile site leverages mobile-specific templates that focus on key sections of the full desktop site. "We wanted to make sure we invested the correct amount of time and effort on the 'portable' part of the intranet," says Elisabeth Beller, Project Advisor, Celerity. "We identified three key main areas that people always need access to whether on travel, walking from one meeting to another, or simply checking in from home: directory, news, and ng+."

Making the *Employee Directory* mobile-friendly was a priority, as many users search the *Employee Directory* on their mobile devices. "The National Geographic headquarters in Washington, D.C., houses staff across three neighboring buildings," says Beller. "People often walk from one building to another to go to meetings, visit the cafeteria, or chat with one of their colleagues. Although the campus has maps displayed in key places close to elevators, these don't have the level of details needed to find a person or meeting room. By accessing the *Employee Directory* through their mobile device, one is able to find the desk number, floor, building, phone number, and email address for the person they need to reach."

Because making the entire site available on the phone wasn't a top priority, and because the Ektron CMS provides an easy mechanism to use mobile templates to produce a mobile site, the team opted for a mobile-optimized version of the site, rather than a custom mobile solution or application. The mobile version of the site is optimized to provide the key content useful to most employees. The mobile templates for the *Employee Directory*, news, and ng+ are powered by the same content on the full version site.

"We leveraged the same user research completed at the beginning of the project to guide decisions regarding the content to be available on mobile and the approach for developing the mobile site," says Esparza. "Budget and resource constraints were also a factor, which led us to the most straightforward solution within the CMS."

The mobile site is targeted for iPhone and Android devices. It is not a native application, but uses jQuery Mobile to take advantage of swipe actions and page transitions. Using HTML5 meant the site would be compatible with National Geographic's core campus technology infrastructure and supported browsers.

SEARCH

As with most intranets, the National Geographic team found that users had problems finding information on the previous intranet; team members did their best to fix that by creating a federated search with easy-to-use search facets. The federated search indexes all of the remaining department Google sites, the HR PeopleSoft/Oracle Database, Ektron CMS SQL Database, and RSS feeds from multiple sites.

Search is handled by Microsoft Search Server, which is built into the site's CMS, Ektron (as of version 8.6). "The product team has spent considerable effort developing Microsoft's search connector to work with the product, and we wanted to leverage these capabilities," says Dymond.

"We have configured Search Server to federate a number of different data sources," he says. "We created a BDC source so that Search Server can index PeopleSoft data such as directory, department, and location information. In addition, a number of National Geographic sites and microsites are indexed so that they can be included or filtered from global search."

Searches are context-sensitive, and users can search within several subsets. This permits global or very specific searches, depending on the user's needs.

- Two thirds of employees have updated their profiles and around 25% are actively using ng+ for asking questions or sharing information with their networks.
- More than half of employees have either commented on or “liked” articles or content posted by their colleagues or Internal Communications.
- Employees feel comfortable weighing in on organizational decisions and contentious issues via the comments section on internal news articles.

And, as employees use the site, they’re exploiting opportunities to find new ways to use it. “Since the overall site is much more attractive and engaging, we’ve also had more employees requesting to have their departmental content featured, or coming to us with suggestions of how we could leverage some of the core functionality even further,” says Vaccaro. “The site is also at the center of all major company announcements.”

LESSONS LEARNED

Vaccaro shares some of the team’s lessons learned:

- **A phased approach is useful.** “One of our main takeaways was that we should have considered a phased site launch. This would have eased the workload on project team members—the last few weeks prior to go-live were intense ones—but most importantly, it would have eased users into the new content, functionality, and design.
- **Prioritize the build based on the complexity of the components.** “Another lesson learned was around the development of ng+, the social component of ngconnect, which occurred toward the end of the project. This was one of the more complex aspects of the site. We may have benefited from developing this component earlier in the process, giving us more time for testing and employee feedback prior to launch.”
- **Communication efforts increase adoption.** “Continual employee communication of the benefits and features of the new site, especially around the social tools, has helped increased adoption. Activities have included special staff photo days, where employees get a smart, new profile photo taken for their profile; demo videos; a special Valentine’s Day promotion and giveaways; plus senior managers microblogging around important meetings, travel, and organizational developments.”
- **An Agile approach can bring clarity to the project.** “We found that the Agile project methodology introduced by Celerity brought us the right level of focus, flexibility, and stakeholder engagement required for the project.
- **Plan for post-launch communication needs.** “While it sounds obvious, the work doesn’t end when you go live. In the weeks after launch, we dealt with a high volume of user questions and requests, department demos, and continued employee outreach and communication. Be prepared for that.”

- **Managing an intranet is a journey, not a destination.** “After coming full circle as a Nielsen Norman award-winning intranet in 2007, to one in dire need of a complete redesign some six years later, perhaps the biggest overall lesson is placing real importance on continuous improvement. The organization has invested in redesigning the intranet, and the best way to protect that investment and continually engage employees, is by constantly looking for ways to improve, and actively engaging employees in that process.”

Triptic (2014)

Using the intranet: triptic is a tech-savvy agency for online communications from Eindhoven, the Netherlands. Since the agency started in 1997, its expertise in online strategy, design, and development has gradually culminated in a specialization in the intranet field. It has developed intranets for large organizations such as Dorel Europe, Jessa Ziekenhuis, and Sacha Shoes.

Headquarters: Eindhoven, the Netherlands

Number of employees the intranet supports:
20

Locations where people use the intranet:
Eindhoven, the Netherlands

Design team: Iris, the company's intranet, was designed and built by an in-house team.

In-house team: Arthur Turksma, Strategist; Rick Cuijpers, Consultant and Project Manager; Roel Knapen, Coordinator; Lieke Huenges Wajer, Test Coordinator; Willem van Berlo, UX Designer; Onno Marsman, Senior Software Architect; Frank Kempers, Developer; Martijn Wernaert, Developer; Teun Beijers, Developer; Tim Didderiëns, Support; Jos Rouw, Copywriter/Editor; Anne Blommaert, Usability Tester; Tatiana Morokko, Controller

SUMMARY

One of several traits that differentiates Iris, the triptic intranet, from many intranets is that it actually looks fun to use. What makes the homepage seem like a good time? Offbeat images, whimsical icons, bright colors, and simple text all draw users in—without crossing the line into being annoying, which is a very tricky balance to achieve.

The Iris homepage recognizes logged in employees and serves up their desired information, such as a personal calendar and social following activity. The news and a poll occupy two other default sections (known as *widgets*) on the page, keeping the employee's finger on the pulse of the organization.

Potential new projects appear in the upper left. This list is connected to the organization's CRM system (Zurmo). Employees can click these links for details or choose the *Create* button to add a new one. The very inviting "anyone can do this" attitude at triptic is apparent in the Iris design, highlighting another trait of great intranets: they convey the organization's goals and culture.

Iris also shows project progress, such as in the *Scrum Burndownchart*, which communicates time spent compared to planned effort for a client working in an Agile development process.

The homepage's right rail houses a toolbox with five tabs that is persistent across Iris. This toolbox makes it possible to search, find people, access documents, and post messages. These tools help people complete key tasks from any page of the site.

The triptic intranet homepage offers news, project information, calendar, project status, and social features in a whimsical way.

The default homepage makes smart selections for widgets for employees. But Iris also lets people customize the homepage by dragging and dropping to move items, or adding and removing widgets through the settings icon.

The screenshot displays the triptic intranet interface. At the top, there's a navigation bar with 'service', 'applications', and a user profile for 'Arthur Turksma'. Below this is a horizontal menu with 'Actueel', 'Organisatie', 'Projecten', 'Wie is wie', 'Media', and 'Teams'. The main content area is divided into several sections:

- Left Sidebar:** Contains a 'Tabblad' section with icons for settings, a list of 'Opportunities' (Clientname X, € 49.000, Prospecting, 25/6/13), and an 'Agenda' section listing events for June 7, 17, and 19, 2013.
- Top Center:** A 'Zurmo' widget with icons for 'Connect', 'Create', and 'Collaborate', and a news snippet about 'Dorel Europe lanceert nieuw intranet'.
- Bottom Center:** A 'Fotoboek' section showing a photo of a castle and a 'Happy Birthday' cake for 'Willard Holinsky' on '14 juni BIRTHDAY'.
- Right Sidebar:** A social feed with posts from 'Arthur Turksma', 'Roel Knapen', 'Deniz Turan', 'JOS Rouw', and 'Onno Marsman'.

The interface is designed to be flexible, allowing users to drag and drop widgets to customize their workspace.

Employees can drag and drop to move widgets (sections) on the triptic intranet.

Beyond being communicative and flexible, Iris is unquestionably a social intranet that offers several lovingly used social features. Employees each have their own wall, which they can access easily by clicking the horizontal navigation menu's speech bubble icon (one of only two icons in the upper left; the other is for the homepage). The logged-in user's image and contact information appear on the left. In the center of the page, employees can write their status, ask a question, or share an idea. Iris also has the capabilities for shared messages, private messages, and notifications—all accessible via the three links above the wall feeds. When employees are posting on their own walls, their photo appears on the right, while their colleagues' posts have photos on the left, making it easy to distinguish each author.

triptic

service applications Arthur Turksma

Actueel Organisatie Projecten Wie is wie Media Teams

Je bent hier: Home > Wall



Arthur Turksma
internetstrateg
aturksma@triptic.nl
310
+31 40 246 30 40

15 Following
7 Teams

Messages 53 My profile My network My teams

All messages Private messages Notifications 53

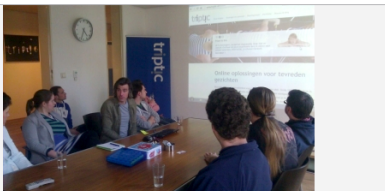
Status Question Idea

Vertel je collega's wat je bezighoudt

Arthur Turksma > Shared with followers
Status update 15 minuten geleden

Het is zo weer tijd voor de Keek op de Maand!

Zijn jullie er klaar voor?



Comments 6 Vind ik leuk 1

Plaats hier je reactie

Roel Knapen > Deniz Turan
Status update 20 minuten geleden

Interessant, zo zie je hoe er uit een andere hoek naar bij. Intranetten wordt gekenken <http://hetnieuwerkenblog.nl/de-toegevoegde-waarde-van-een-enterprise-social-netwerk-1/>

Comments 0 Vind ik leuk 0

Plaats hier je reactie

Deniz Turan > Shared with followers
Question 42 minuten geleden

Hebben jullie nog leestips? Blogs en zo, over webtech?

Comments 4 Vind ik leuk 2

Onno Marsman
Reactie 28 minuten geleden

Op zich ook een goeie: Web Performance Today

Vind ik leuk 0

Roel Knapen
Reactie 25 minuten geleden

Goed zo, blijven lezen! Vooral na half zes :)

Vind ik leuk 1

Plaats hier je reactie

JOS Rouw
Status update 2 uren geleden

Jos Rouw heeft een blogpost (Connect, Create, Collaborate: Dorel Europe lanceert nieuw intranet) toegevoegd

Comments 0 Vind ik niet meer leuk 2

Tevreden Gezichten Overzicht

Plaats hier je reactie

vrie is vrie

Zoek

A	B	C	D	E	F	G
H	I	J	K	L	M	N
O	P	Q	R	S	T	U
V	W	X	Y	Z		

Rick Cuijpers
Telefoon: +31 40 246 30 40
ma di wo do vr
Ochtend
Middag:

Roel Knapen
Telefoon: +31 40 246 30 40
ma di wo do vr
Ochtend
Middag:

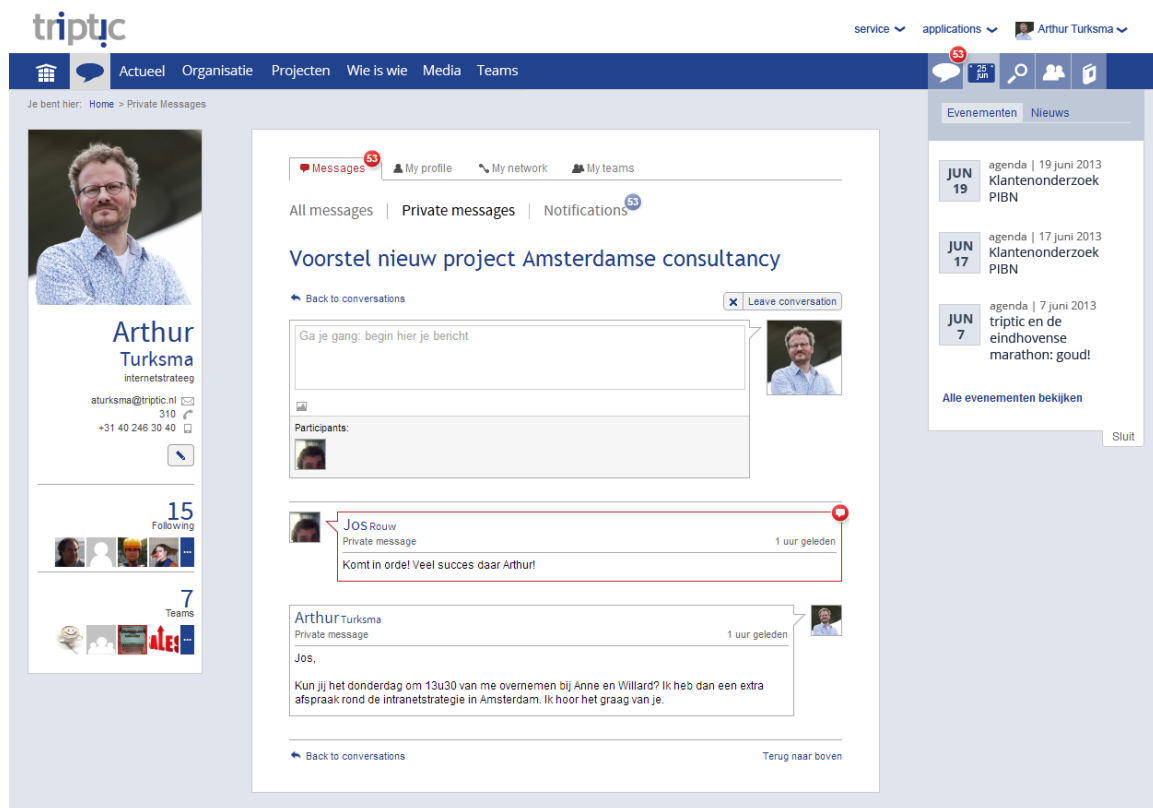
Jos Rouw
Telefoon: +31 40 246 30 40
ma di wo do vr
Ochtend
Middag:

Uitgebreide wie is wie

Sluit

All employees using the triptic intranet have their own wall where they can post information such as status and questions. The toolbox is in the right rail; here, it has the third tab selected, which is an alpha search for people with an open search field. The results for the letter "R" show corresponding employees' name, phone number, photo, and schedule.

In the *Private Messages* section, accessible through a link at the top of the page, employees can write private messages to one other colleague, and later add more people to the discussion. The prompt within the text field says, "Go ahead: start your message here," encouraging people to communicate.



Employees can send messages to one or more selected colleagues through the intranet's *Private messages* section.

The *Notifications* section provides an overview of the activity of the colleagues the employee is following. Each rectangle displays the name, picture, and latest post. When users hover on a profile picture, it opens a summary, including the person's name and picture, the number of people the person is following (along with a sample of those people), and a button to send the person a message.

The screenshot displays the triptic intranet interface. At the top, the triptic logo is visible alongside navigation links: 'service', 'applications', and the user's name 'Arthur Turksma'. Below this is a dark blue header bar with tabs for 'Actueel', 'Organisatie', 'Projecten', 'Wie is wie', 'Media', and 'Teams'. The main content area is divided into three sections. On the left is the user's profile for Arthur Turksma, showing his photo, name, title 'internetstrateg', email 'aturksma@triptic.nl', and phone number '+31 40 246 30 40'. The central section is titled 'Notificaties' and lists recent activities from users the logged-in user is following. These include: Anne Blommaert commenting on a status update; Tim Diddieriens liking a status update and posting a message about 'Keek op de Maand!'; Onno Marsman liking a status update; and Roel Knapen liking a comment. A pop-up window for Roel Knapen is also open, showing his profile and a list of people he is following. On the right side, there is a sidebar with additional updates, including a status update from Arthur Turksma about a meeting, a status update from Roel Knapen about a blog post, and a question from Deniz Turan about webtech. The bottom of the sidebar has a link to 'Ouder messages' and a 'Sluit' button.

The *Notifications* area on the triptic intranet displays the latest activity of people the logged-in user is following.

Social features are also accessible and helpful from a group level. For example, team walls encourage members of a particular team to congregate online and share information such as success stories and examples of work they've done to help clients.

triptic

service applications Arthur Turksma

Actueel Organisatie Projecten Wie is wie Media Teams

Je bent hier: Home > Team wall

Tevreden Gezichten Overzicht

administered by:

7 in team

2 Blog post(s)

0 Media item(s)

Tevreden Gezichten Overzicht

Messages Blog Team profile Media library

Status ? Question Idea

Vertel je collega's wat je bezighoudt

Lieke Huenges Wajer
Status update
20 juni 2013, 11:30

Allergieradar is het nieuws! <http://www.nu.nl/algemeen/3505531/slechte-dagen-pollenpatienten.html> !!!!

Comments 0 Vind ik leuk 4

Plaats hier je reactie

Anne Blommaert
Status update
13 juni 2013, 12:07

Meest patiëntvriendelijke website!

Jessa Ziekenhuis heeft patiëntvriendelijke website

de samenwerking van de ziekenhuizen. Het gaat om de patiëntvriendelijke website van het ziekenhuis, met de informatie die de patiënt nodig heeft om de zorg te krijgen. De website is nu online en kan gebruikt worden om de zorg te krijgen. De website is nu online en kan gebruikt worden om de zorg te krijgen.

Comments 1 Vind ik leuk 1

JOS Rouw
Reactie
13 juni 2013, 12:28

Een prestatie die enkel mogelijk was dankzij...

triptic @triptic
Meest patiëntvriendelijke websites bekroond op [hygge](#)
...waaronder die van onze opdrachtgever @JessaZiekenhuis! Proficiat!

Jessa Ziekenhuis @JessaZiekenhuis

Een prestatie die enkel mogelijk was dankzij de samenwerking met het topteam van

wie is wie

Zoek

A B C D E F G
H I J K L M N
O P Q R S T U
V W X Y Z

Rick Cuijpers
Telefoon: +31 40 246 30 40
Ochtend: ma di wo do vr
Middag:

Roel Knapen
Telefoon: +31 40 246 30 40
Ochtend: ma di wo do vr
Middag:

Jos Rouw
Telefoon: +31 40 246 30 40
Ochtend: ma di wo do vr
Middag:

Uitgebreide wie is wie

Sluit

Team walls on the triptic intranet encourage team members to share knowledge and experiences.

If employees have more than a few short comments to communicate to their team members, they have the option on Iris to write a team blog; these passages appear immediately after the employee posts them.

triptic

service applications Arthur Turksma

Actueel Organisatie Projecten Wie is wie Media Teams

Je bent hier: Home > Wall

Arthur Turksma
internetstrateg

atursma@triptic.nl 310
+31 40 246 30 40

15 Following

7 Teams

Arthur Turksma

"In the Electric World, Change is the Only Stable Factor (marshall mcluhan, 1966)"

E-mailadres: atursma@triptic.nl
Phone: 310
Mobile: +31 40 246 30 40
Department:
Function:
Availability: mon tue wed thu fri
morning ☐ ☐ ☐ ☐ ☐
afternoon ☐ ☐ ☐ ☐ ☐

Expertise: strategie, internet, intranet, design thinking, presentatietechnieken

Interests: TED
Birthday: 26 juni

Introduction

Het leven makkelijker maken met technologie, dat is mijn grote interesse en drijfveer. Als oprichter van TEDxBrainport en natuurlijk als strateeg hier bij triptic. Laten we blijven zorgen voor tevreden gezichten bij onze opdrachtgevers. Enne... ik hou van bloemetjesbloezen!

Arthur is active on

LinkedIn <http://nl.linkedin.com/in/dutchart/>
Twitter <http://www.twitter.com/dutchart/>

Wall PB

Status ?

Vertel je collega's wat je bezighoudt

Deel

Arthur Turksma
Status update
15 minuten geleden

Het is zo weer tijd voor de Keek op de Maand! Zijn jullie er klaar voor?

Roel Knapen
Status update
20 minuten geleden

Interessant, zo zie je hoe er uit een andere hoek naar bijv. intranetten wordt gekeken <http://hetnieuwwerkenblog.nl/de-toe...>

Read more

Deniz Turan
Question
42 minuten geleden

Hebben jullie nog leestips? Blogs en zo, over webtech?

JOS Rouw
Status update
2 uren geleden

Jos Rouw heeft een blogpost (Connect, Create, Collaborate: Dorel Europe lanceert nieuw intranet) toegevoegd

Tevreden Gezichten Overzicht

Onno Marsman
Status update
21 juni 2013, 12:20

Om af te trappen: een forum per team om discussietopics te kunnen starten.

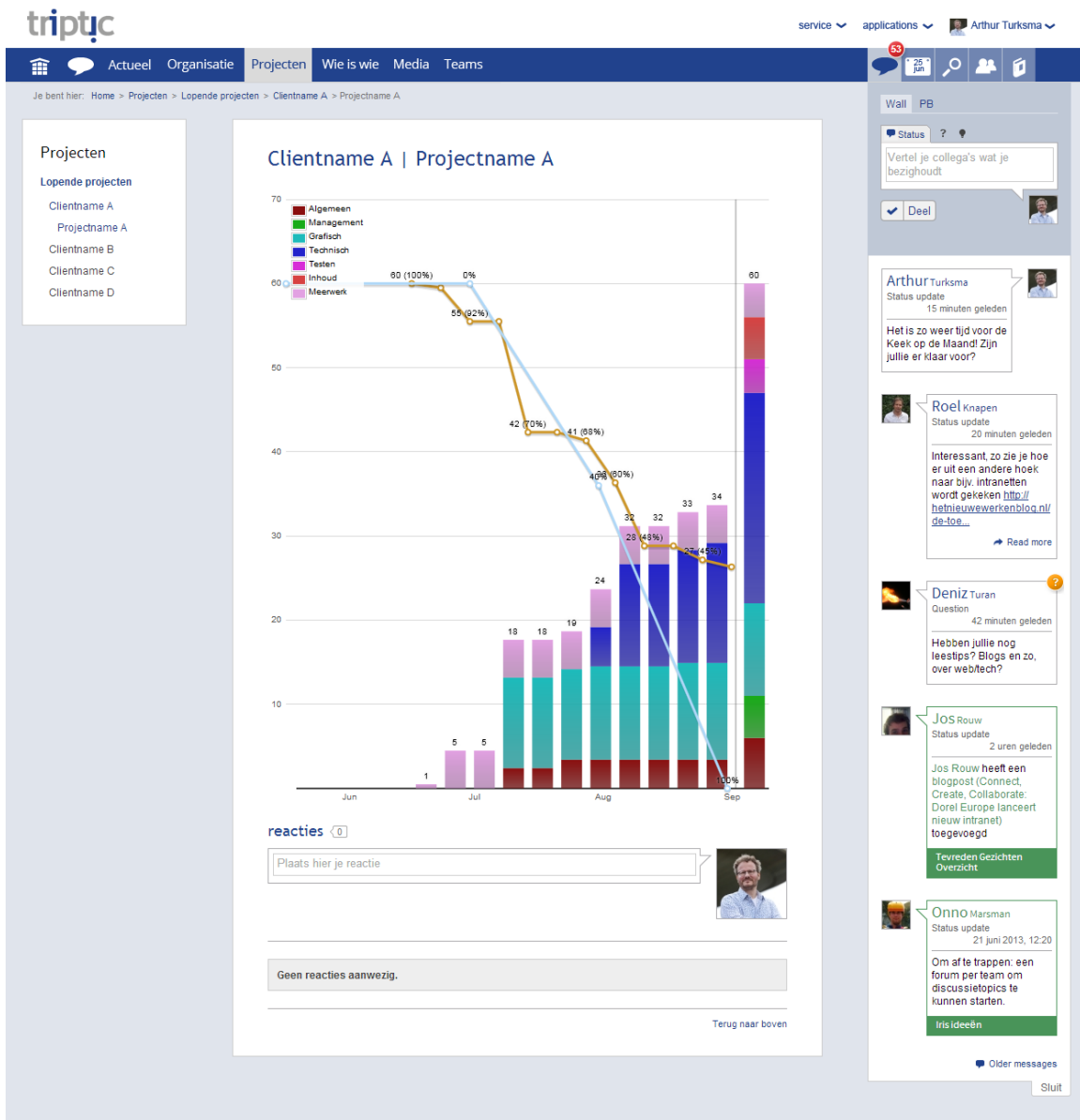
Iris ideeën

Older messages

Sluit

Employee profile pages on the triptic intranet include thorough summaries.

Information about particular projects is housed under the *Projects* menu. triptic keeps copious records about project activities and schedules, and benchmarks what was planned against what is actually happening (or has happened). Bar-line charts are one type of graphic employees use as a basis for communicating, discussing, learning, and planning.



Project pages on the triptic intranet help team members communicate, track, and plan their work.

As if all of these smart features on Iris were not enough, the entire intranet is accessible on mobile devices and desktops alike, as it's a responsive intranet design. The intranet designers wanted to ensure that people could communicate and retrieve information on Iris from anywhere, anytime, and chose this method to meet this goal.



The triptic intranet is a responsive design, easy to use on large and small viewports alike.

On a smartphone, the social icon, two menu links, and a menu icon at the top of the screen allow employees to navigate to the toolbar (which appears in the right rail when viewed on a large screen). In this view, designers chose to make the project chart a high priority and display its content first, and the employee's social activity next; however, any employee can rearrange their dashboard to suit their liking.



The triptic intranet homepage, as viewed on a smartphone, displays the social and menu icons at the top, followed by the highest-priority content.

Unlike a phone interface, a tablet has enough screen real estate to show the toolbox in the right rail.



The right-rail toolbox remains persistent in the triptic intranet's tablet view.

When viewed on a phone, the social tab shows fewer comments by default than the desktop version, but the comments are still easily legible. Although the photos of colleagues who comment are a little harder to see on a small screen, the names are very legible. In this view, it helps even more to have the colleagues' photos appear on the left side of their posts.



The social tab on the phone view looks similar to the desktop view, but shows fewer comments by default.

Overall, Iris is a breath of fresh air. She is disarming, funny, smart, modern, and available when you need her. And we would really delight in spending time with her.

BACKGROUND

The triptic intranet was designed, above all, to enhance collaboration. Although it was inspired by well-known public social media platforms, it was designed to be something different: an employee's central starting point.

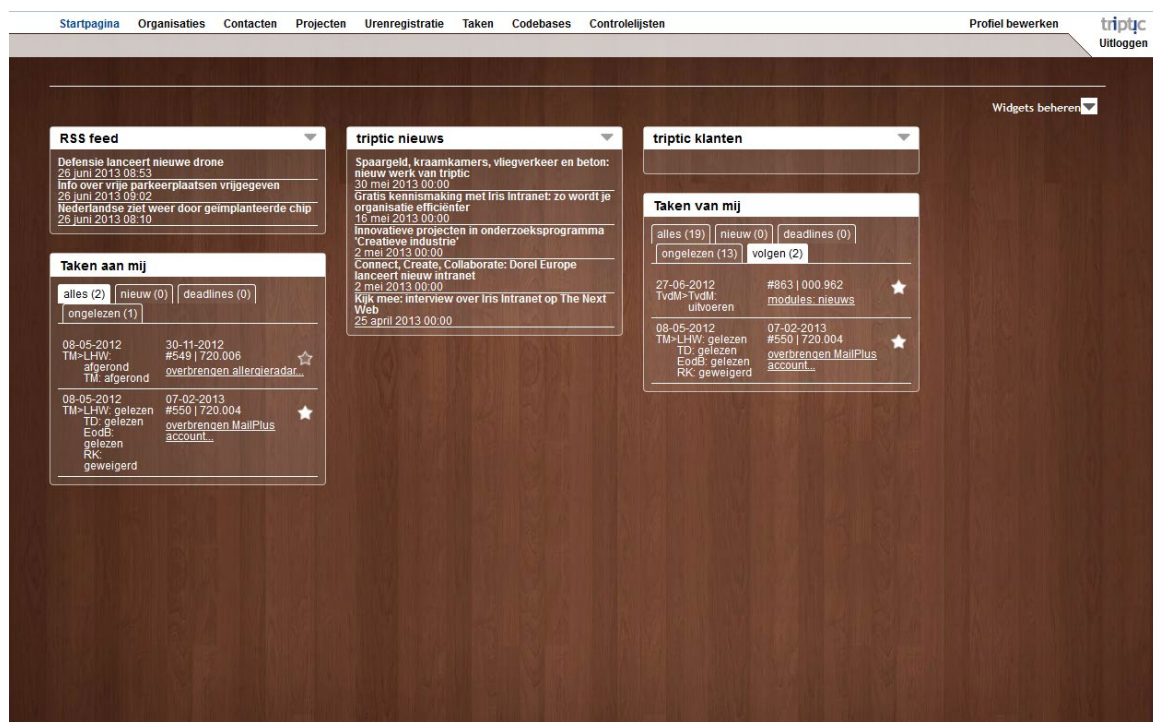
"Our clients were looking for ways to work more efficiently," says strategist Arthur Turksma. "So, we came up with platforms that enabled them to do so. And, when we saw the positive impact these platforms brought along, we decided to start using an intranet ourselves. By that time, Iris showed up."

What the team strived for was to ensure that Iris was not “just another” business tool.

“I have some experience with different enterprise social media platforms,” says Rick Cuijpers, Consultant and Project Manager. “But what I dislike is that they’re often like another system next to the other software you use, ‘YASP’—yet another software platform—another place you have to go to. I prefer the intranet to be an employee’s central starting point.”

The main challenge for triptic was to find the time to create their own intranet while also serving client projects; despite their great work for others, the firm found themselves in a scenario where the cobbler’s children had no shoes.

“The main obstacle was: how do you organize this?” says Cuijpers. “We want to keep developing, keep innovating, but we also have our clients to produce for. Put simply, time was an issue.”



The older version of triptic’s intranet was quite static and mainly focused on project and task information.

INTRANET TEAM



The triptic team (left to right, standing): Tim Didderiëns, Frank Kemps, Anne Blommaert, Martijn Wernaert, Onno Marsman, Lieke Huenges Wajer, Willem van Berlo, Tatiana Morokko, and Jos Rouw; (left to right, sitting): Roel Knapen, Rick Cuijpers, and Arthur Turksma.

GOVERNANCE

triptic was fortunate in that its experience advising clients on governance structure helped it see the uniqueness of its own governance needs. "Though we are experienced with governance for our clients and see it as indispensable for intranet success, it is not an issue within our own agency because of its relatively small size," says Turksma, adding that, at triptic, "employees' formal tasks are also their intranet roles. Everyone's responsible for input related to their own expertise.

"That way," he says, "governance takes care of itself. The intranet reflects the agile way we manage our day-to-day work: taking responsibility instead of getting it."

Also, colleagues' roles within the company are the same on the intranet. "So, for instance," says Turksma, "our colleague Tim provides support to our clients, and is also the go-to guy for such matters on our own Iris."

Ownership

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Intranet Strategist	• Overall strategy and concept design
Software Developer	• Programming
Software Architect	• Technical design
Design + UX	• Usability and look and feel
Intranet Coordinator	• Content and structure
Test Coordinator	• Testing
Support	• Support
Controller	• Budget control and time management
Editor	• Content

USERS

The entire 20-person staff at triptic uses Iris. With this tool, the various teams can now share insights much more easily than before. The company's designers and developers, sales and communications officers, managers and strategists can work on ideas together in interactive team pages. This type of online collaboration has changed the company culture, moving it from face-to-face meetings to more online discussions.

"At our agency, we work in multidisciplinary groups of developers and designers, but on the intranet, we have specific teams per specialization—where, for instance, graphic designers and interaction designers discuss recent developments in their field together," says Turksma. "Also, our sales team recently saw a drop in the number of meetings by preparing for pitches on the intranet together."

triptic

service applications Arthur Turksma

Actueel Organisatie Projecten Wie is wie Media Teams

Je bent hier: Home > Teams

Teams

All teams

Find a team by entering a (part of a) team name

[Click here to search in my teams](#) time | abc

Teams

 Tevreden Gezichten Overzicht Online oplossingen voor tevreden gezichten! Update: 7 minuten geleden	 Iris ideeën Plaats hier al je ideeën over nieuwe features in Iris. Update: 21 juni 2013, 12:20
 Sales Tja, voor alles gerelateerd aan Sales Update: 21 juni 2013, 12:11	 Gaming Van alles en nog wat over games. Update: 21 juni 2013, 11:54 Join this team
 Films Voor de mensen die graag nog een keer 'what' zeggen Update: 21 juni 2013, 10:51	 A-team The A-Team Update: 20 juni 2013, 19:15
 Sangria Voor de levensgenieters onder ons Update: 19 juni 2013, 18:30	 Kurk Kurk team Update: 19 juni 2013, 13:39 Join this team
 Blòøgs Ideeën, meningen, video's, links: deel je input voor blogs Update: 18 juni 2013, 10:58	 LEGO® De technische developers van triptic Update: 18 juni 2013, 10:39
 qdo core team qdo core team Update: 17 juni 2013, 11:34	 Development Development algemeen: Kurk+Lego Update: 11 juni 2013, 16:54 Join this team
 Vetl Team vetl Update: 10 juni 2013, 16:55	 PV leden pv leden Update: 10 juni 2013, 15:55

[Terug naar boven](#)

Wall PB

Status ?

Vertel je collega's wat je bezighoudt

Deel

Arthur Turksma
Status update
15 minuten geleden
Het is zo weer tijd voor de Keek op de Maand! Zijn jullie er klaar voor?

Roel Knapen
Status update
20 minuten geleden
Interessant, zo zie je hoe er uit een andere hoek naar bijv. intranetten wordt gekeken <http://hetnieuwwerkenblog.nl/de-toe...>
[Read more](#)

Deniz Turan
Question
42 minuten geleden
Hebben jullie nog leestips? Blogs en zo, over webtech?

JOS Rouw
Status update
2 uren geleden
Jos Rouw heeft een blogpost (Connect, Create, Collaborate: Dorel Europe lanceert nieuw intranet) toegevoegd
Tevreden Gezichten Overzicht

Onno Marsman
Status update
21 juni 2013, 12:20
Om af te trappen: een forum per team om discussietopics te kunnen starten.
Iris ideeën

[Older messages](#)

Sluit

This team's overview page shows how users can arrange all team pages alphabetically or by the most recently updated, and also use the search engine to find a particular team. Team pages can be open, semi-open, or closed, depending on each team's preference.

URL AND ACCESS

The URL of the homepage is: <https://iris.triptic.nl>.

DESIGN PROCESS AND USABILITY WORK

Design Approach

The company used a design approach that Turksma calls “Intranet Design Thinking.” “We went and defined the key worker types,” he says. “In our case, a programmer, designer, sales manager, controller, etc., and asked ‘What’s their ‘journey’ on a typical work day?’”

From this, team members developed and tested prototypes. The intranet and the specific modules are based on the company’s design methodology and its phases: *empathize, define, idealize, prototype, and test.*

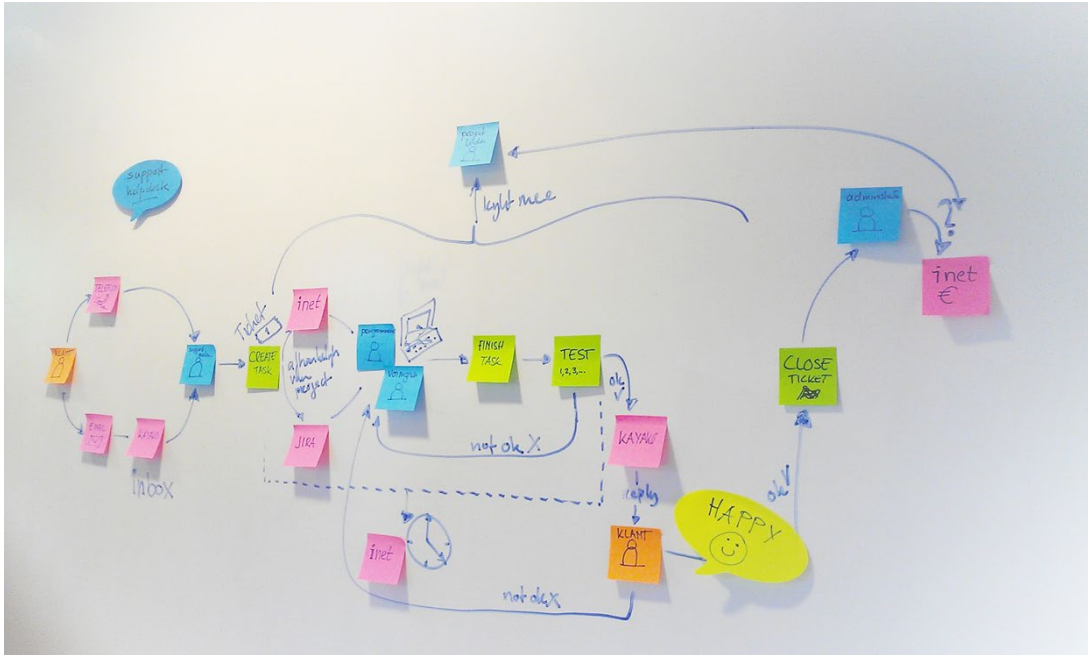
The team was careful to plan not just for launch of a successful site, but also for its growth.

“Looking at social intranets, we saw that after they were launched, knowledge sharing would work for a while, but then the activity would decrease,” says Turksma. “Why? Because it just feels like there’s even more work to do. We felt like there had to be a way to make it more dynamic, more efficient, and, well, easier.”

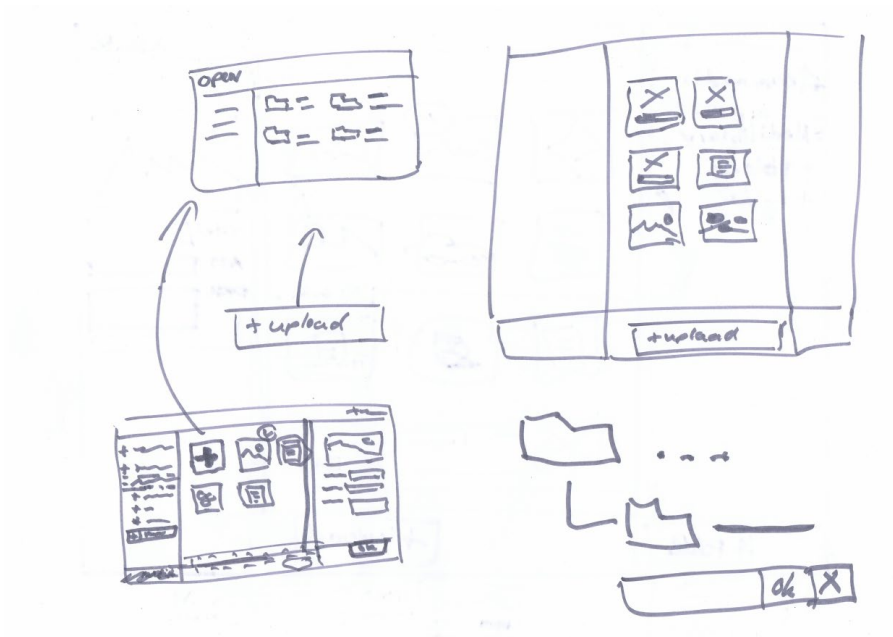
With that as their goal, team members set out to answer several pertinent questions—including “What do people need to complete their tasks?” and “How do you facilitate that, or better yet, how do you improve their activities?”—and made answering those questions a fundamental part of their intranet design approach.

The team analyzed user behavior on several intranets and looked into recent studies on digital interaction and collaboration. “That was the starting point for our designing process,” says Turksma. “We did some usability tests for early versions of our intranets, both with an outside agency that specialized in usability testing, and with smaller tests we conducted ourselves, inspired by Steve Krug’s down-to-earth approach.”

Cuijpers adds that, “over the last few years, I got inspired by the well-known social media as well. We learned quite a bit from their best practices.”



The design team mapped out the customer journey using sticky notes and a white board to identify how it could make things less complicated and easier to use.



An early sketch used to figure out how and where to insert media in the intranet. Hundreds of sketches were created to optimize the “design language” and the platform’s usability. To maintain consistency in the designs, the team made a template of all interactions and behavior, and made guidelines in a design pattern, so that the experience of each of these is consistent throughout the intranet.

TIMELINE

triptic's evolution from creator of intranets for client use to creator of an intranet for its own use was a gradual unfolding. Ideas that were developed to meet client needs were eventually applied to the company's own requirements.

"At triptic, we've generally seen a development from a 1.0 intranet, which served to inform, to a primary process-based intranet with everything from invoicing to hourly registration and overviews of contacts and projects, to the social stuff based on connecting with each other and sharing knowledge," says Roel Knapen, Coordinator. "Around that time, when customers asked us to implement enterprise social media, we saw all our developments fuse into the idea of Iris: a platform of integrations and connections, with all the information and intelligence to help you."

Forces outside the company's universe also played a part in shaping the outcome of the Iris platform.

"The worldwide crisis played its part as well," says Knapen, "as it really forced organizations to think about efficiency. We were looking for ways to get a better idea of the hours we spend on projects and incorporate this into our invoicing and registration systems. Now, this also integrates seamlessly with our Scrum Agile approach: we can use all this information to inform our people on the progress of projects, thus aiding their decision-making, stimulating autonomy. Basically, we use technology to serve both the primary process and the people."

INTRANET TIMELINE	
Milestone Date	Milestone Description
1999	First version of internal billable hours registration system
2001	First version of internal wiki
2005	First integrations of billable hours registration, project management, support, and CRM into the Supportweb internal environment (known as <i>Sweb</i>)
2005–2009	- Further development of <i>Sweb</i> (now called <i>inet</i>) - Improved UX
2009	- After developing several extranets/protected sections of websites, first client requests for social intranets were received - Developed Swiss Army Knife and dashboard concepts
2009–present	Developing intranets for clients built on triptic's proprietary CMS, qdo
2011–2012	Development of <i>inet</i> functionality continues, including creating financial overview functionality, reports visualization, and checklists for work evaluations
2012–2013	All internal (<i>Sweb</i>, <i>inet</i>) and external (client intranets) development merged into what is now known as <i>Iris</i>, the company's internal intranet platform

CONTENT AND CONTENT CONTRIBUTORS

A Homemade CMS

Although triptic team members are no strangers to various industry-leading CMSs, all this knowledge has led them to develop their own.

"In the past we have worked with several Content Management Systems, some well-known, but eventually we built our own and chose to use it for our intranets," says Onno Marsman, Senior Software Architect. "We found that the open source alternatives are not reliable enough when it comes to usability, accessibility, security, and how fast users may feel confused or break something."

The team believes that its internal CMS is more robust, flexible, and safer than existing systems.

Everyone Contributes

At triptic, everyone contributes content to the intranet. “We like trust and openness in our agency,” says Turksma, “and since we’re a fairly small company anyway, there is no need for an editorial workflow. The fact that we built it ourselves stimulates our people to actively participate on the intranet. And, of course, our colleagues know it like the backs of their hands because they developed it and they provide support to our clients, so they can help each other out when it’s necessary.”

Content contributors are quickly provided with feedback through comments and “likes.” The company’s communications officer and copywriter shares his tips for effective online writing with the staff, and the company has created two specific teams on Iris dedicated to feedback: one for bugs and improvements, and another for “‘Happy Faces’ from our customers,” says Turksma.

The team also pays close attention to site stats to provide insights into what’s working and what isn’t. “We just love statistics,” says Knapen. “They provide us with insights on what’s popular and what isn’t. With those in mind, we do make appropriate adjustments, instead of just looking at them.”

TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and O/S	• Linux: CentOS (Windows is also possible) • PHP • MySQL (or Microsoft SQL) • Virtual machine with four cores, 8GB RAM, 160GB hard disk space
Bug Tracking/Quality Assurance	• Bazaar version control system • Selenium automated testing/continuous integration/PHP Unit • JIRA
Design Tools	• Photoshop • Illustrator • Gliffy • Post-its!
Site Building Tools	• PHP Storm • Various browsers with specialized plugins (including Firebug and several web developer tools)
Content Management Tools	• qdo CMS
Search	• Apache Lucene (SOLR)
Other Functions	• Active Directory

MOBILE

Iris is fully accessible and available on smartphones and tablets. Using responsive web design, it adjusts to accommodate portrait and landscape orientations in both content and layout.

The content is fully available through tablet and mobile as well, but the design adjusts its widgets accordingly. Depending on the device and the context, some content becomes more or less prominent. For example, on mobile, the *Scrum Burndownchart* displays as only the big picture, with no detailed view. The team decided that the drill-down capability is needed only on desktops.

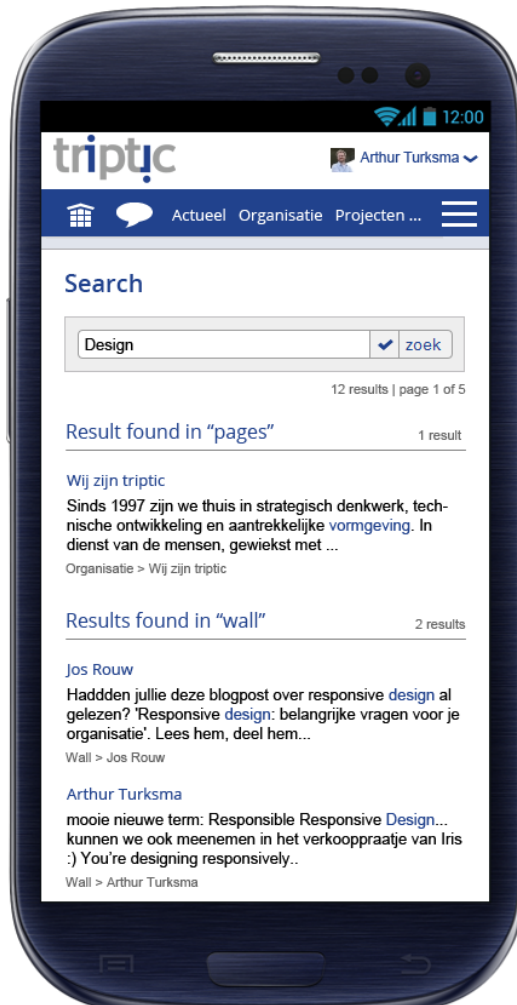
"The idea for presenting content differently was task-related," says Turksma. "On the road, you have different priorities. For instance, and, in the case of our agency, most importantly, when our accounts people are on their way to clients or pitches and want to look up information. All this stems from design thinking: what is needed and where?"

"It's difficult to prioritize, to decide which content is most important on smartphones especially," says Willem van Berlo, UX designer. "To give you a simple example, people on the road will most like be looking for contact information rather than other personal information. I find the biggest challenge is this prioritizing and leaving other stuff behind.

"We deliberately chose to go responsive instead of building an app, to create more or less the same environment on each device, so Iris really gets familiar," he says. "Another challenge is to keep the intranet as 'light' as possible when it comes to the data you hit a mobile phone with. You have to take bandwidth into consideration."



An example of a mobile content page



A search results page adapted for mobile display.

RESULTS AND ROI

Early Successes

Although Iris is still young, the triptic team has experienced some early successes with the site. "We've only been running it for a couple of months, but we already recognize the benefits we've also seen with our customers' intranets," says Cuijpers, adding that triptic employees "work more efficiently and more easily, which is very rewarding."

The social aspects of Iris are helping staff spend less time pushing paper and more time collaborating with co-workers. "Our biggest success is that, on a day-to-day basis, we notice that we spend less time on paperwork and more time on actually working together," says Turksma. "For example, during the sprint of a project, all the people involved are more informed and always know what to do next. We notice that the amount of calculated hours is closer to the number of actually executed hours than before. That sure makes me happy."

Another good example of how Iris has transformed work practices is how things work when the agency prepares a pitch for a prospect. "Normally, you'll typically see a huge load of emails in a short period of time," says Turksma, "but now everything is very clearly organized on Iris. That saves us a lot of time, no longer having to dig into piles of mails when you're out and about.... Iris helps us save minutes each day, which makes us more productive. It's a pleasure to have her around."

"We haven't yet calculated an exact amount of time we save, but everybody is experiencing the benefits," says Knapen.

LESSONS LEARNED

Iris team members share their lessons learned:

- **Leave time to address cross-browser peculiarities.** "When it comes to cross-browser, we were surprised a few times. For instance: when we discovered some things did not work in an older version of Internet Explorer that was still widely used. We had to implement older techniques so it would be supported by this browser. That provided us with some design challenges." (Marsman)
- **The cobbler's children need fancy stilettos, too.** "[Making] time is an issue. We want to keep developing, keep innovating [for ourselves], but we also have our clients to produce for. Put simply, time is an issue." (Cuijpers)
- **You are never done.** "When it comes to developing, one of my most important lessons is the fact that you're never done. Never done developing, but also, when working with clients, you are never done with system integrations, governance, stimulating user adoption, and streamlining processes." (Cuijpers)
- **Test early and often.** "Interesting advice for other intranet designers would be to start using automated tests right away. We should have done that earlier on, for example, [with] the messaging matrix, in which it is determined which user sees which information. It became too complex for manual testing, which cost us a lot of hours." (Cuijpers)

Accolade (2015)

Using the intranet: Accolade is a social housing organization that rents about 16,000 affordable homes around Drachten, Heerenveen, Franeker, Sneek, and Joure (in the northern province of Friesland). It has 40,000 customers, and mainly focuses on households having annual incomes under 35,000 euros.

The company motto, “Helemaal je eigen plek” (literally, “entirely your own place”) stands for the idea that finding a place to call home is everyone’s right, whether an individual, a young family, or someone disabled and in need of some extra care. Everyone can be admitted and rent a home from Accolade.

For that reason, the organization does more than just deliver affordable, comfortable homes. Stimulating a good quality of life in the districts and neighborhoods it serves is just as important. The objective is to find a suitable home in a pleasant area to live in, especially suited to the customer’s needs.

Headquarters: Heerenveen, The Netherlands

Number of employees the intranet supports: 200

Company locations: Heerenveen, Sneek, Franeker and Drachten, The Netherlands

Annual sales: \$58.2 billion in 2013

Design team: Four in-house people formed the core team. The team was supported by the agencies Embrace SBS and Umbrella, both part of the Malengo Group.

In-house: Irene Willems-Sloot, Communication-specialist; Hiltje Rinsma, Manager Customer Contact; Michiel Booij, IT-specialist; Bianca Bijlstra, Information-specialist

In-house ambassadors: (These ambassadors were part of the test group. They delivered input in the early stages of design and right now they provide other colleagues with tips and tricks how to use the intranet): Fred Hesselink; Klaas de Groot; Andre Jongsma; Rinette van der Wal; Hennie de Ruiter; Fennie Haanstra; Gretha van Veen; Marjan Maat; Jolanda Buursma; Wietske Atsma; Simone Rozenboom; Ryna Marra; Jelly van der Werk; Annelies Veenstra

In-house knowledge moderators (responsible for keeping the information in the knowledge base complete and correct): Teunis van der Veen (Sales); Ineke Moraal (daily maintenance); Wilbert Rienstra (real estate); Dominicus Nota (IT); Renata Mentjox (Information services); Ellen Dikland (Communication); Marjan de Blauw (Finance); Gretha Waterlander (Rent homes / Customer contact); Hennie de Ruiter (Districts and areas); Gerda de Lange (Finance); Luuk van der Wal (Districts and areas); Fred Hesselink; Klaas de Groot; Andre Jongsma; Rinette van der Wal; Hennie de Ruiter; Fennie Haanstra; Gretha van Veen; Marjan Maat; Jolanda Buursma; Wietske Atsma; Simone Rozenboom; Ryna Marra; Jelly van der Werk; Annelies Veenstra.

Malengo Group: Hilda Boerma, Manager Marketing; Eli van der Horn, Project Manager

Embrace SBS: Martijn Weesjes, Consultant; Douwe-Jan Hibma, Interface designer; Jan-Willem Geertsma, Front-end developer; Koen Wemmenhove, Consultant; Cor Eikelenboom, SharePoint developer; Jeroen Scholtens, .NET developer

Umbrella: Jonas Hansel, Front-end developer; Dajo Hein, .NET developer; Wouter Duteweerd, .NET developer; Jolle Lont, .NET developer; Ynte de Jager, Lead developer.

SUMMARY

Faced with the challenge of trying to deliver better services to its customers (and also serve more channels) while working with a smaller budget, the Accolade team turned to creating a new intranet as the solution. The social housing office, based in The Netherlands, was receiving less money from the Dutch government, but needed a way to continue their goal of putting the customer first. The organization rents 16,000 affordable homes, helping customers find a suitable home in a pleasant area, suited to the customers’ needs. The team decided a new intranet, focused on helping the organization’s 200 employees do their jobs more efficiently, would help reduce costs and improve performance.

One of the benefits of working on an intranet is that your users are all around you. The Accolade team took full advantage of that fact, doing early research with colleagues and including them at every step along the way. They invited their colleagues to have a voice in the site even before the team had a fully formed vision of what the intranet should be. They looked to their colleagues to form that vision with them.

Employees were asked what their expectations for the intranet were, and how or what they expected to contribute to it. This put the emphasis on social sharing from the get-go. The team asked questions such as:

- What are your frustrations in your work?
- What does a perfect day at work look like?

Employee feedback was translated into specifications. A panel of 15 employees was key to the development process, providing early input and testing on the new site. These employees turned into site ambassadors who helped introduce the new site and functions to colleagues, while encouraging and supporting intranet adoption.

The design team also followed Customer Contact Center employees in their normal workdays, following up with interviews to fully understand work processes, what worked well, and what did not. Further, all employees were invited to participate in the design process, whether through suggesting names for the site or providing input or feedback.

The organization's front office is the frontline of communication with customers, receiving about 35,000 customer inquiries via phone annually. Previously, employees had to search different systems to find answers to customer inquiries, and sometimes that information, when found, was old and incorrect. As a result, customers had to wait longer for replies that were not entirely helpful due to the state of information.

The intranet needed to consolidate information and do better to connect front-office employees with the people having the right expertise for various customer inquiries.

Armed with data and input, the team decided to "think big, but act small," taking an Agile approach to start with a "light" version of the intranet and introducing functionality and complexity over time. Accolade's in-house team of four worked closely with employees from Embrace SBS, who delivered the site's social component, and Umbrella, who provided the task management aspect of the tool and connected it to the Customer Contact Center software. The team had first looked for a customer relationship management solution, but found the systems were too traditional to fully support the organization's needs. Instead, they integrated social tools with task management and customer support and created a social-powered solution that supports the company's internal processes.

Organizational processes and social tools are integrated together, encouraging communication and collaboration. This solution was potentially risky, as many of the organization's 200 employees were not familiar with social tools and their conventions. For instance, the concept of "liking" a story was foreign to some users.

Social tools are integrated with the core functionality of the site, so as employees visited the new site to complete tasks, they saw the utility of the social aspects as well. The site launched without providing any formal training, and yet with only the

use of a quick guide and an online tutorial, employees have picked up the social tools quickly.

With many employees being new to the social tools, there have been a few hiccups. Rather than creating formal guidelines for usage, the team has taken a more casual approach, posting public tips for employees who may not quite understand the best use for a tool. For instance, some employees posted entire documents in places intended for microblog copy. When this type of thing happens the team replies to the post with a tip about where to post documents in the future, which helps the contributor as well as other employees who see the tip.

The homepage of the intranet reflects Accolade's emphasis on the customer. The middle of the page offers a carousel with three rotating news items, and employees can customize the homepage, rearranging page elements like the customizable widget that provides a snapshot of company performance called *How do we perform?* Performance statistics give employees a sense of how the organization is doing on a daily basis. Further, employees can hover over any of the statistics to see more information as well as discuss or suggest areas for improvement.

For instance, one of the most important organizational measures of success is the number of homes occupied. To make the best use of the properties and serve customers quickly, Accolade strives to move a new tenant in as soon as an old tenant vacates. Showing this information on a daily basis keeps employees up to date with the larger performance indicators, as well as gives them the opportunity to say or do something about those numbers.

The middle of the homepage is a stream showing activity from the various teams or groups that employees belong to. Employees can like or comment on what their co-members share.

Site navigation appears at the top right, offering links to *Home*, *All Teams*, *News* and a section offering information from the Human Resources, Communications, Facility and Information Technology groups, and also the knowledge bank.

The left sidebar gives quick access to the employee's profile, notifications, colleagues, teams, tasks and access to customer information. The right side of the page includes a personalized list of applications (which can all be opened without repeatedly signing in to each one), updates about changed or posted information on the site, the CEO's blog, and information about Accolade in outside media. Other available widgets include the *birthday calendar*, *Twitter feed*, *My Favorites*, *RSS feed*, *notes*, *weather forecast*, and so forth.

The screenshot displays the Accolade Intranet Homepage. At the top, a navigation bar includes links for 'home', 'alle teams', 'nieuws', 'regelplek', and 'kennisplek'. A left-hand sidebar provides quick access to 'Profiel', 'Notificaties', 'Collega's', 'Teams', 'Taken', and 'Kanten'. The main content area is divided into several sections. The top section features a 'pluk' logo and a headline about repair requests. Below this, a 'hoe doen we het?' section uses circular progress indicators to show the status of various tasks. A 'deel met je collega's' section displays a post by Edwin Croonen. Another post by Joz Kook is visible. The right sidebar contains 'jouw apps (6)', 'Recent gewijzigd', 'De week van Rein', and 'Voor jou gelezen' sections.

Pictured: Accolade Intranet: Homepage. The Accolade intranet homepage gives employees quick access to updates and information from colleagues, a snapshot view of performance, a one-click way to access key tools and applications, and corporate information via news stories, the CEO blog, and articles about Accolade from outside sources.

Employee profiles allow users to share information, which helps colleagues find one another and make connections. The team realized there had to be a low barrier for employees to enter information if employees were going to take the time to do it. As such, they allow employees to quickly fill in profile information by associating their LinkedIn profile.

The profile page is split into several tabbed views. The default view shows general kinds of profile information together with the latest updates, availability information, extended profile information like expertise and experience, pages the employee has created, and documents the employee has added. The orange link at the top of the page allows employees to “follow” one another, or be updated when a colleague posts content on the site.

The left column of the page shows the employee’s colleagues, who are listed based on their most recent activity on the intranet. The employees’ status is listed as well, so users can easily chat with, call, or email co-workers. People shown in black are online while those shown in gray are offline. If they appear in color, an integration of sorts with Outlook and Lync is made. Green means available and orange/red means they are in a meeting (busy). The right side of the page shows a list of colleagues who associated with the particular user (colleagues from the same department). In the image shown above, it is translated as “Colleagues of Hilda.”

The screenshot displays the 'Mijn collega's (197)' section of the Accolade Intranet. The main profile shown is for Hilda Boerma, a Consultant at Malengo. The profile includes a photo, contact details (phone, email, mobile), and a list of colleagues. The left sidebar shows a list of colleagues, and the right sidebar shows a list of colleagues for Hilda Boerma.

Homepage \ Collega's \ Hilda Boerma

home alle teams nieuws regelplek kennisplek

zoek op intranet

Mijn collega's (197)

ONLINE (1) OFFLINE (196)

Filter collega's

Martijn Weesjes

Martijn Weesjes
Product Manager at Accolade
+31 (0)6 2299 3659
martijn.weesjes@accolade.nl
Accolade
Heerenveen, Thorbeckestraat 2a

Frank Smit
Paul Goedhart
Samir Yekhtef
Bryen Dijksterhuis
Renko Rispen
Wesley Jonker
Karin van Ravenwaal
Erik Dokter
Dag Hein
Douwe Jan Hilma
Rob Wijckma
Johan Timmer
Peter Moolbroek
Danyl Rinzena

Hilda Boerma
Naam: Hilda Boerma
Geboortedatum: 20-12-1981
Mobiel nummer: 06 - 51 87 40 40
E-mailadres: hilda.boerma@accolade.nl
Functie: Consultant at Malengo
Vestiging: Acton Groningen

Persoonlijke samenvatting
Als consultant bij Malengo (voorheen VinsAction en Acton) begeleid ik organisaties bij het bepalen en realiseren van hun online doelstellingen. Naast een stuk advisering, steek ik ook graag mijn handen uit de mouwen. Ik schrijf toegespitste teksten op baariveau B1, voornamelijk voor online media. Ik ben goed in het structureren van informatie en denk graag mee over een contentstructuur die werkt voor de klant van de klant.

In de afgelopen 7 jaar heb ik verschillende adviesrollen en interim opdrachten vervuld bij organisaties in de not-for-profit sector: met name bij woningcorporaties, zorginstellingen en gemeenten.

Ervaring

Consultant
Malengo
november 2009 - heden

Interim consultant
Antonius Zorggroep
mei 2013 - december 2013

Interim projectmanager nieuwe website
Antonius Zorggroep
juli 2012 - december 2012

Interim redacteur klantcommunicatie
UWV
december 2009 - april 2010

Projectmanager / Studiomanager
Malengo
september 2006 - oktober 2009

PR / Communicatie / Internet / Intranet / Klantenservice
Acanus Groep
februari 2006 - augustus 2006

Opleidingen

NKBV (Nederlandse Klim- en Bergsportvereniging)
Momenteel geen informatie beschikbaar, Alpeine Toerleider 3 (ATL-3)
2012 - 2013

Hanzeonnet
PRINCE 2 Foundation, Information Technology Project Management
2007 - 2007

University of Nijmegen
BA + MA Business Communication, (Online) Business Communication, Marketing Management, Spanish, Psychology
2001 - 2005

Dollard College
VWO, Momenteel geen informatie beschikbaar
1996 - 2001

Werkzaam op locatie

Accolade Heerenveen
Kamer nummer 23
Thorbeckestraat 2a
8442 CZ Heerenveen

Collega's van Hilda

Paul Goedhart
Planning

Hermen Joodens
Planning

Samir Yekhtef
Planning

Pictured: Accolade Intranet: Employee Profiles. Accolade employees can fill in additional details, like expertise, in their intranet profiles, and easily communicate with colleagues via a list of connections on the left side of the page.

The team added some offline encouragement for users to complete their profiles as well. Signs on office restroom mirrors remind users what they can add to their profiles. The text reads, "Fill in your profile on Pluk. Everything about me: Name, job, phone number, email. Important information: Knowledge, Projects, Experience, Competencies." And, of course, nicely provides a cutout so employees can still use the mirror, as well!



The Accolade intranet team used signs on office bathroom mirrors to remind and encourage employees to fill in more details in their employee profiles.

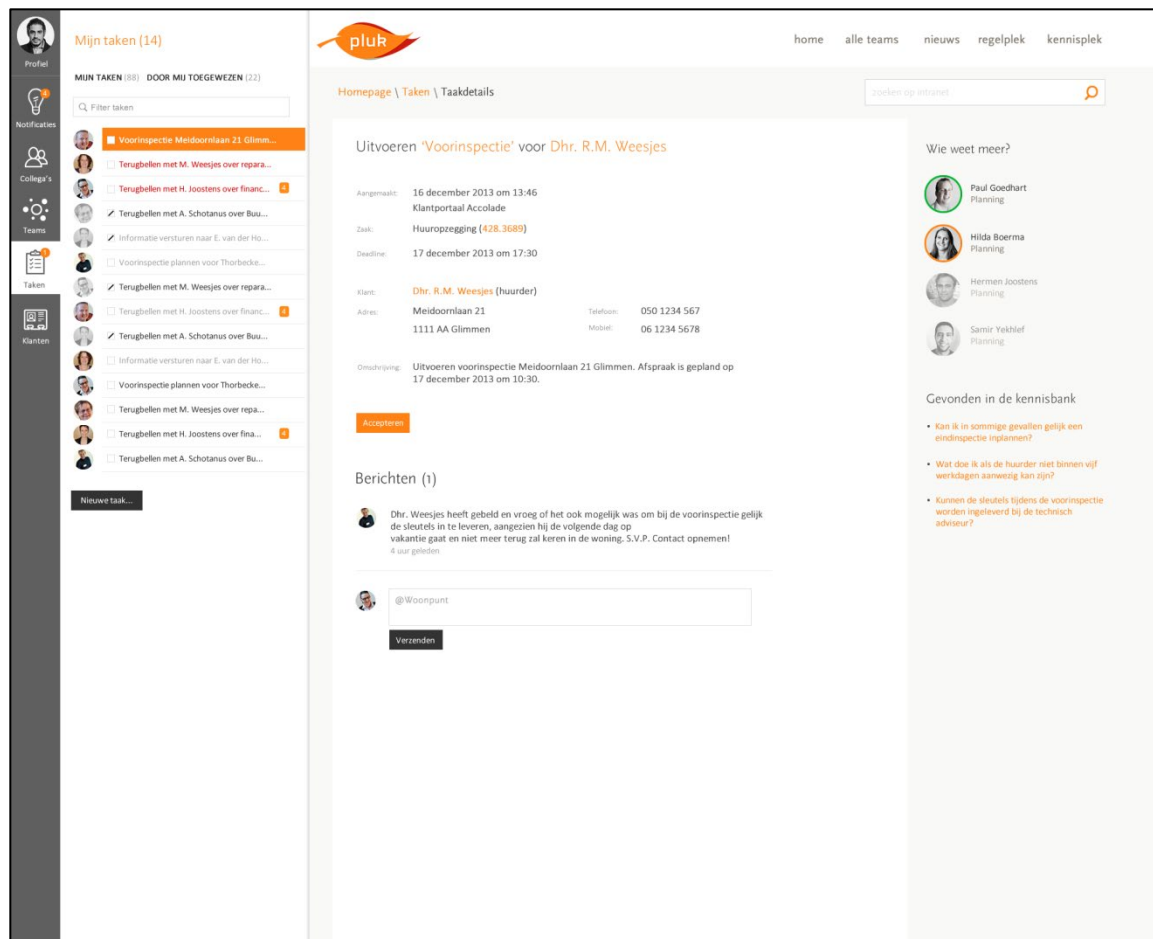
The main goal of the site is to streamline communications with customers. Now employees can access any system they need by simply turning on their computer, which automatically signs them into the intranet each day. This has streamlined work and made it easier for employees to track communications with customers as well as to easily contact colleagues when needing help.

With a goal of answering 80% of customer questions via the front office, the organization is seeing fewer errors in customer phone calls as well as providing quicker responses, saving time for the front office workers as well as customers.

Employees are now able to find the information they need in the knowledge base. The knowledge base is supported and continually updated by employees throughout the organization, who can contribute and update information. Any question the front office employees can't answer is now posted on the intranet and directed to the appropriate department or person, who then receives a notification of an outstanding inquiry.

Task management is integrated with social components. The task management page shows tasks assigned to the employee or his team. Color is used to indicate status, such as "completed," "in progress," or "due." Numbers in orange indicate new messages from colleagues. The body of the page shows the details of each task, such as the deadline, a description, customer information, related frequently asked questions (fed from the knowledge base) and related experts.

For example, the front office will add a task because they are unable to answer a question or need clarification from a colleague. Employees responding to the task can make a short response about any contact, such as "I called and left a message." The front office is then notified when the task is completed.



Pictured: Accolade Intranet: *Tasks*. The *Tasks* area of the Accolade intranet site consolidates information about activities that need to be completed.

Customer data is integrated into the site, so employees with the right permissions can look up any customer in a quick and easy way, by name, address, postal code, birthday, or phone number. The customer page includes customer details pulled from Umbrella, the customer contact application. If users need to add or update information, they can do so easily via links that lead directly into the customer record in Umbrella and no additional login is needed.

All information is stored at a customer level; employees don't need to search different databases to see the full story about a customer. This allows easy tracking of customer communications. Anyone who may have contact with the customer can see what prior contact occurred and the status of outstanding questions. As a result, customers are complaining less, and when they do, employees have a full record of what happened, who talked to the customer, and what was said.

The system even includes information posted to social media. The Customer Contact Center monitors social media channels, replies to posts, and translates those to tasks for the organization as needed.

Klanten (5)

Profil

Notificaties

Collega's

Teams

Taken

Klanten

Klanten

Home | alle teams | nieuws | regelplek | kennisplek

Homepage | Klanten | Klantkaart

zoek op intranet

H. Rinsma-Priem

Klant: **Mevr. H. Rinsma-Priem (huurder)**

Adres: **Meidoornlaan 21
4123 AB Glimmen**

Telefoon: **050 1234 567**

Mobiel: **06 1234 5678**

Open volledige klantkaart

overeenkomst 3614.2589

Ingangsdatum	20-10-2010	Lidmaatschap huurdersvereniging	€ 0,00
Beëindigingsdatum	Lopend	Kale huur	€ 382,71
Rekeningnummer	1248.236.253	Schoonmaakkosten	€ 26,70
Automatische incasso	Automatische incasso	Servicefonds	3,50
Openstaand saldo	0,00	Elektriciteit algemeen	15,80
Onderwaarsaaken	Lopend	Glasfonds	1,20
Brutohuur	€ 429,91		

Object Abe Lenstra Boulevard 50, 8448 JB Heerenveen

Abe Lenstra Boulevard 50
Heerenveen - geschied adres
Abe Lenstra Boulevard

Type woning: Appartement met lift

Behuurluster: Accolade Drachten

Planmatig 2013: Dakgoot (bekleding)

Afvoer (hwa)

Vloer binnen (bekleding)

Dakbedekking (vlak dak)

Leuningen en balustrades

Gevel (constructief)

Dakbedekking (hellend dak)

Complex: 510146

WfE nummer: 5105124

Planmatig 2016: Buitendeur

Schilderwerk (buiten)

Beglazing

Buitenkozijn (algemeen)

Dakbedekking (vlak dak)

Vloer buiten (bekleding)

Vloerisolatie aanbrengen

Dakraam & dakkapel

Schilderwerk (binnen)

Gevel (constructief)

Gevel (afwerking)

Wie weet meer?

Paul Goedhart
Planning

Hilda Boerma
Planning

Hermen Joostens
Planning

Samir Yekhtef
Planning

Gevonden in de kennisbank

- Kan ik in sommige gevallen gelijk een eindinspectie inplannen?
- Wat doe ik als de huurder niet binnen vijf werkdagen aanwezig kan zijn?
- Kunnen de sleutels tijdens de voorinspectie worden ingeleverd bij de technisch adviseur?

Pictured: Accolade Intranet: Customer Information. On the Accolade intranet customer information is easily searched through the site, which provides an easy entry point into the customer contact application as needed, for easy updates.

The site's success is perhaps best exemplified by the number of satisfied customers who get the information they need in a timely manner. Employee uptake on the site has been impressive, with 191 of the site's 205 users uploading a photo to their profile, and 184 of 205 employees participating on the site weekly.

BACKGROUND

The driving force behind Accolade's adoption of a social intranet was the desire to connect the front office with the rest of the organization to help it achieve better results with its service offerings. In order to accomplish this, the organization had to

reorganize how it conducted its customer service activities. The social intranet was at the center of that change, allowing the organization to put the customer first. Irene Willems-Sloot, Communication Specialist, said they had two main objectives:

- **“Launch software.** The software would enable us to collaborate and work together on cases and processes, as well help us manage tasks for the back office (both work-focused and case-focused).”
- **“Avoid bureaucracy.** We didn't want any bureaucracy in connecting the front office with the organization, but we did want to act in line with business values like entrepreneurship, collaboration, transparency, and approachability.”

Now the social intranet is an integral part of the organization's work practices. Every employee needs the social intranet to do his work. Creating that kind of synergy was by design. “That is why we built a social intranet with our primary processes completely integrated into it, with 'social task management' included,” says Willems-Sloot.

“If you don't use the intranet, you cannot do your work properly,” she says. “When you start your computer, you are automatically logged in (with single sign-on) to the social intranet. You can open other applications (without logging in) through the intranet and you can personalize the homepage of the intranet with the widgets and applications you want (like iGoogle).”

The screenshot displays the Accolade Intranet interface. At the top, there's a navigation bar with 'home', 'alle teams', 'nieuws', 'regelplek', and 'kennisplek'. A sidebar on the left contains icons for 'Profiel', 'Notificaties', 'Collega's', 'Teams', 'Taken', and 'Klanten'. The main content area features a 'hoe doen we het?' section with five circular progress indicators for different business metrics: huuropzegging (134), voorinspectie (2.8d), plannen/ uitvoeren BMO (4.3d), aanbieden woning (1.3d), and verhuren woning (8.3d). Below this is a 'huuropzegging' table showing data for various locations and a timeline for January. To the right, there's a 'jouw apps (6)' section with icons for various applications, a 'Recent gewijzigd' section with a list of recent document updates, and a 'De week van Rein' section featuring a photo of Rein and a quote. At the bottom, there's a 'Voor jou gelezen' section with a list of recommended articles.

Location	Count	Percentage
Joure (1.236)	54	40%
Drachten (1.865)	38	28%
Heerenveen (4.189)	21	16%
Sneek (6.545)	16	12%
Franeke (2.976)	5	4%

Pictured: Accolade Intranet: Reports Widget. On the Accolade intranet, a reports widget is available that shows how the organization is performing on certain business metrics. Employees can see that information, but they can also comment on the report to help improve the performance of the company in certain areas.

INTRANET TEAM



Accolade (in-house) team members (left to right): Hilda Boerma, Frank Smit, Hiltje Rinsma, Michiel Booij, Bianca Bijlstra, Berend Hut, Martijn Weesjes, Koen Wemmenhove, Hermen Joostens, Irene Willems-Sloot, and Erik Dokter.

GOVERNANCE

The Communications & Marketing department is the owner of the intranet and has overall responsibility for the site.

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Irene Willems-Sloot, Communication Specialist	• Oversee the intranet and responsible for community management
Michiel Booij IT Specialist	• Maintain the connections between the intranet and the business systems
Hiltsje Rinsma Manager Customer Contact	• Maintain connection with front office • Responsible for social task management
Bianca Bijlstra Information-specialist	• Coordinate the activities of the moderators who manage the managed content (keeping the knowledge base up-to-date)

Figure 1. Accolade Intranet Team Responsibilities

USERS

The Accolade intranet supports all of the organization's employees, from the front office and back office department to the maintenance engineers. It also supports all departments — administration, Human Resources, IT, Facility Management and Communication — as well real estate agents.

URL AND ACCESS

URL AND ACCESS INFORMATION	
Category	Technology Used
URL	• pluk.accolade.nl
Default status	• The intranet is published as an application within the organization's Terminal Service (TS) environment. The intranet application launches when users sign in. Changing the browser's default homepage does not affect this.
Remote access	• When users are not on the corporate LAN they can access the intranet by using Citrix. Employees can use their personal browser and navigate to the corporate Citrix landing page. After logging in (with their personal user, password and token set) they can use the intranet the same way as if they were on the corporate LAN itself. This method is regularly used by a large group of users. • Also, the organization's TS environment is currently published via Citrix and can be accessed externally by certain users using a security token. At a later point they plan to publish the intranet in a way all users can access it without needing a security token.

Figure 2. Accolade URL and Access Information

DESIGN PROCESS AND USABILITY WORK

Design Approach

In October 2013, the Accolade design team asked the company's employees to help it build a new intranet and instead of making a functional design and asking them for their opinion and feedback, the team decided to involve them much earlier in the process. "We asked them what they would expect from a new intranet and what they expected to contribute to it," says Willems-Sloot. "And we tried to take as many aspects as possible and turn them into specifications."

In addition to the core intranet team, the following groups were involved in this research:

- **A panel of 15 employees**, from several departments, was asked to contribute input and these employees were used as early stage testers.

- **Every other employee who wanted to be involved.** For example, people were asked to help think of a name for the intranet and people were asked to bring ideas to the table for functionality and features.

The team continued with this type of personal approach throughout the project so they could delve deeper into user motivations through face-to-face interactions. “We choose to emphasize personal interaction in our methods,” says Hiltsje Rinsma, Manager Customer Contact, Accolade. “We wanted to talk to people directly, so that we could immediately ask follow-up questions. This way people would think along with us, and their replies weren’t anonymous as with surveys. We picked the people we talked to carefully. If we hadn’t spoken to anyone from a certain department after the first round, we simply went there and asked people until we had.”

Research Methods

In addition to reaching out to employees, the team employed other user-focused activities. Koen Wemmenhove, a consultant from Embrace SBS, explains:

- **“Card sorting:** We held a brainstorm session with a group of colleagues to determine the navigational structure and used statistical analysis to analyze the content from the previous intranet. Also, we spoke to representatives from various departments about what content they thought was essential for the new intranet.

“To conclude the session we gathered all the information and labeled it either static or dynamic content. Static content — content that only changes a few times per year, at most — will earn a spot in the main navigation. Dynamic content — which changes frequently — will be put into team sections, microblog and dynamic pages.

- **“Focus groups:** We’ve conducted several focus group sessions with a group of 12 people who in addition to participating in focus groups, later became intranet ambassadors. In the first meeting, we asked them: what did they want to do on the intranet, what did they want to find, and what would they like to arrange.

“We collected the answers on sticky notes and based our functional design on this research. With this information, we could also process some quick wins. For example, a lot of people told us that they were looking for the company’s logo.

- **“Field studies** (visiting and watching people in their workplace): We followed employees during their work at the Customer Contact Center and interviewed them afterwards. They were able to tell us what information about their colleagues was crucial for them to do their work. The extent to which colleagues were available for us to do this research and have them questions was essential, as was our ability to see their agendas.”
- **Meeting with other teams:** In this case, members of the Accolade team visited with the intranet team of another social housing office (Mijande Wonen) that has worked with the software from Embrace SBS since 2010. This step proved helpful to Accolade’s own project because it learned that integration with a primary system is essential for the adoption of the intranet. The Accolade team also learned from the other team’s experiences and lessons learned.

Social, by Accident, Not by Design

The new intranet project was part of a bigger project called “Focus on the Customer,” which had been in progress for two years. The team started to work with Umbrella when they needed software to support the company’s Customer Contact Center. That was in the summer of 2012 and this is how the early steps played out:

- **Step 1** (June 2012–December 2012): Set up a centralized Customer Contact Center (front office), in order to organize customer contacts across all of the company’s communication channels.
- **Step 2** (late 2012–March 2013): Connected the Customer Contact Center with the rest of the organization. As it happened, the team was not originally looking for a social intranet. First they searched for a suitable CRM system, but discovered those systems too traditional for their needs. They ultimately found what they were looking for by integrating the primary processes into a social intranet.

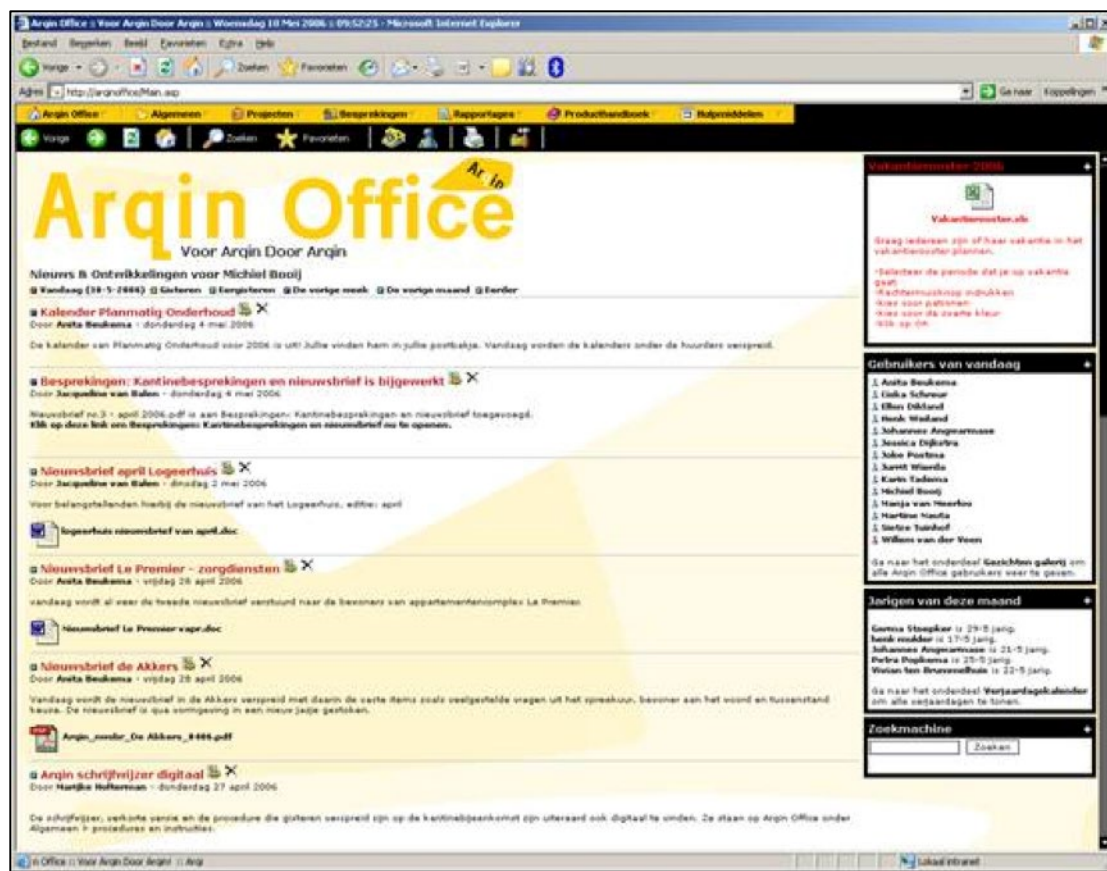
The team had a good experience from that, so they asked their agency partner, Embrace SBS (also part of the same company), to integrate task management and told them they wanted a “light” version of Umbrella. The new social intranet now connects the front office with the rest of the organization.

- **Step 3** (March 2014–end 2014): The team is currently working on a customer portal within the intranet, to help connect the customers with the rest of the organization.

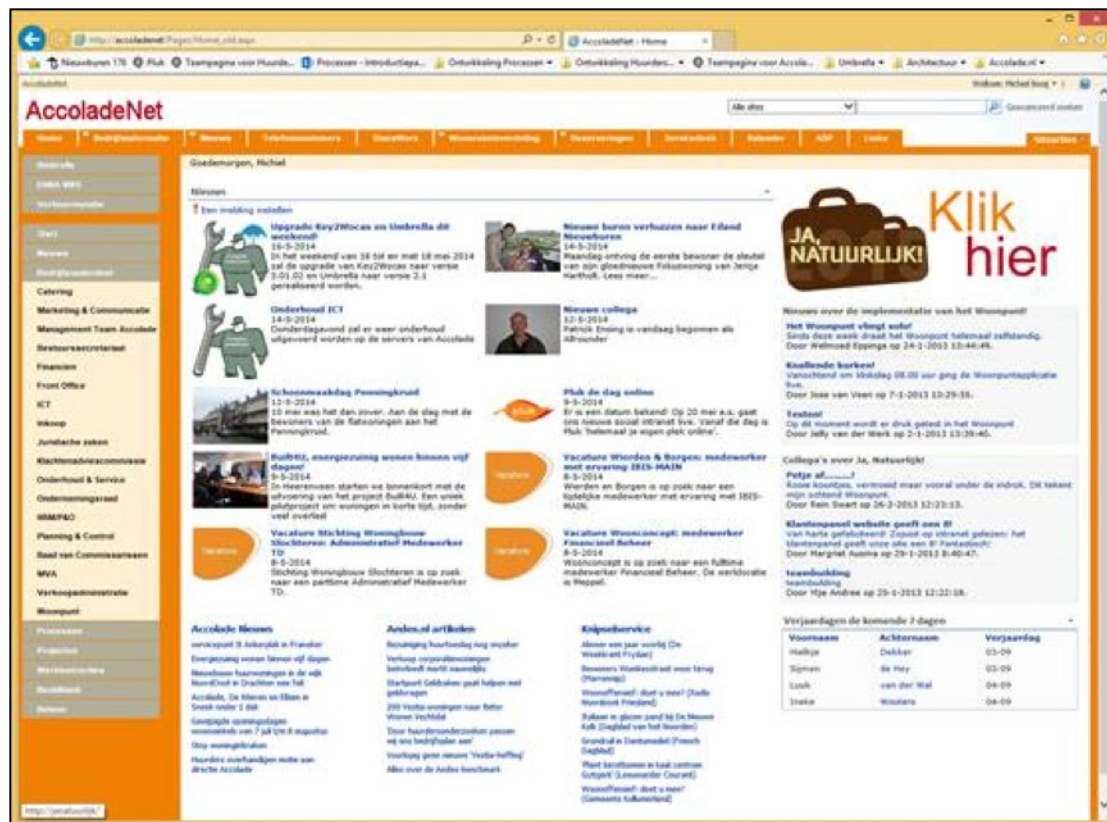
TIMELINE

PROJECT TIMELINE	
Milestone Date	Milestone Description
2003–2006	• Accolade Group Intranet created and managed with Microsoft FrontPage (HTML pages)
2006–2009	• Accolade Group Intranet developed using PHP, with some parts manageable via CMS
2003–2009	• Arqin Office Intranet developed using .ASP and content from file share systems, no CMS (see image below)
2009–2014	• AccoladeNet based on SharePoint 2007 (see image below)
October–December 2013	• Begin research for new intranet
January 2014	• Begin implementation on new intranet
April 2014	• New intranet online
July 2014	• New release online
September 2014	• New release online

Figure 3. Accolade Project Timeline



Pictured: Accolade Arqin Office Intranet: 2003-2009. This shows how the Arqin Office (Heerenveen office) intranet looked before it and the other offices were merged under the umbrella of the Accolade intranet. The Arqin intranet was developed with .ASP, featured files from file share systems, and had no CMS.



Pictured: Accolade AccoladeNet: An Early Intranet Design. The AccoladeNet was an early intranet based on SharePoint 2007.

CONTENT AND CONTENT CONTRIBUTORS

The Accolade intranet uses SharePoint 2013 Server. SharePoint was chosen as backend and CMS for the following reasons:

- High availability
- Built-in document management system functions such as version control and advance authorization
- Native compatibility with other Microsoft products such as Microsoft Office Web Apps, Lync, and Exchange
- Automation of processes via SharePoint workflow
- Flexibility

All employees at Accolade are able to develop content for the intranet. Employees can personalize their respective homepages, decide for themselves what information they want to share, and what information they want to read. They can also decide which widgets they will use, identify which teams they are a member of, and choose which colleagues they want to follow. Rather than provide any specific guidelines or rules for employees to operate by, the team has simply chosen to triage any mistakes that occur; for example, placing content in the wrong team or placing extremely long documents in a microblog post). When triage is needed, the team will

leave a tip so the individual user (and others) know what went wrong and how to do it better next time.

The team has also appointed a group of moderators who keep the information housed in the knowledgebase correct and up to date. Each of them is responsible for the content of their respective department.

The screenshot displays the Accolade Intranet interface. At the top, a navigation bar includes the 'pluk' logo and links for 'home', 'alle teams', 'nieuws', 'regelplek', and 'kennisplek'. A sidebar on the left provides quick access to 'Profiel', 'Notificaties', 'Collega's', 'Teams', 'Taken', and 'Klanten'. The main workspace is titled 'Homepage \ Teams \ ICT \ Congres Intranet 2014' and contains a rich text editor with a bulleted list of tasks related to the 'Congres Intranet 2014'. Below the text is a screenshot of a spreadsheet and a video player showing a woman speaking. A text block below the video describes a social business test. On the right, a 'Pagina bewerken' (Edit page) sidebar shows metadata like 'Huidige versie' (Current version: 5.2), 'Publicatiedatum' (Publication date: 16 april 2013), 'Auteur' (Author: Welmoed Eppinga), and 'Status' (Status: Gepubliceerd). It also includes buttons for 'Stoppen met bewerken' (Stop editing) and 'Publiceren' (Publish).

Pictured: Accolade Intranet: Support for Team Collaboration. Accolade employees can work together in teams on different pages on the Accolade intranet where they are able to perform certain tasks, such as basic text editing, add photos and documents, and embedding YouTube videos and SlideShare files. They can collaborate on pages, comment on pages, and lock pages if they don't want other colleagues to edit the content. The Corporate Communications department can use the pages for corporate news by tagging content with the #corporatenews hashtag.

The screenshot displays the Accolade Intranet Knowledge Base Integration interface. The top navigation bar includes the 'pluk' logo and links for 'home', 'alle teams', 'nieuws', 'regelplek', and 'kennisplek'. The left sidebar contains navigation icons for 'Profiel', 'Notificaties', 'Collega's', 'Teams', 'Taken', and 'Klanten'. The main content area shows a search bar and a breadcrumb trail: 'Homepage \ Kennisplek \ Huurbetaling \ Huurverhoging 2014'. The central article, 'Huurverhoging 2014', provides information on annual rent adjustments in the Netherlands, effective from July 1st. It includes a list of frequently asked questions (FAQs) such as 'Wilt u meer weten over de huurverhoging van 2014?', 'Ik heb een huurverhogingsbrief ontvangen. Hoe werkt dat?', 'Wanneer ontvangt u van ons de huurverhogingsbrief?', 'Wanneer wordt de jaarlijkse huurverhoging doorgevoerd?', and 'Ik ben het niet eens met de huurverhoging. Wat kan ik doen?'. A 'Toon laatste vraag' button is located below the FAQs. The right sidebar, titled 'Meer informatie', lists details like 'Publicatiedatum: 16 april 2012', 'Geldig tot: 16 april 2013', 'Auteur: Welmoed Eppinga', 'Doelgroepen: Website, Intranet, KCC', and 'Status: Gepubliceerd'. Below this, the 'Wie weet meer?' section lists experts: Paul Goedhart, Hilda Boerma, and Hermen Joostens, each with a profile picture and role. The bottom section, 'Meer in de kennisbank', lists related topics like 'Ik heb een huurverhogingsbrief ontvangen. Hoe werkt dat?', 'Wanneer ontvangt u van ons de huurverhogingsbrief?', and 'De huur van mijn woning is verhoogd door de jaarlijkse huurverhoging. Moet ik mijn huurtoeslag ook aanpassen?'.

Pictured: Accolade Intranet: Knowledge Base Integration. The Accolade team integrated the intranet with the knowledge base from its front office application, Umbrella. Now when users search or browse categories, the intranet displays related information and topics (e.g., frequently asked questions) by publication date, author, location of content (intranet or website), status, and even names and contacts of people may know more about the subject. If users see content isn't correct, they can easily report it.

TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and OS	A virtualized environment with Windows Server 2008, 8GB of dedicated RAM and shared CPU, and a separate MS SQL instance.
Bug Tracking / Quality Assurance	Team Foundation Server (TFS) is used for source control, issue tracking, and unit tests.
Design Tools	Fireworks and Axure are used for prototyping and testing with users.
Site Building Tools	The intranet is developed in Visual Studio 2013 with TFS.
Content Management Tools	The intranet is also dependent on a SharePoint 2013 farm for storing documents and content management.
Search	Lucene is used for searching inside the intranet. SharePoint search results are delivered through a plugin architecture.

Figure 4. Accolade Intranet Technology

MOBILE

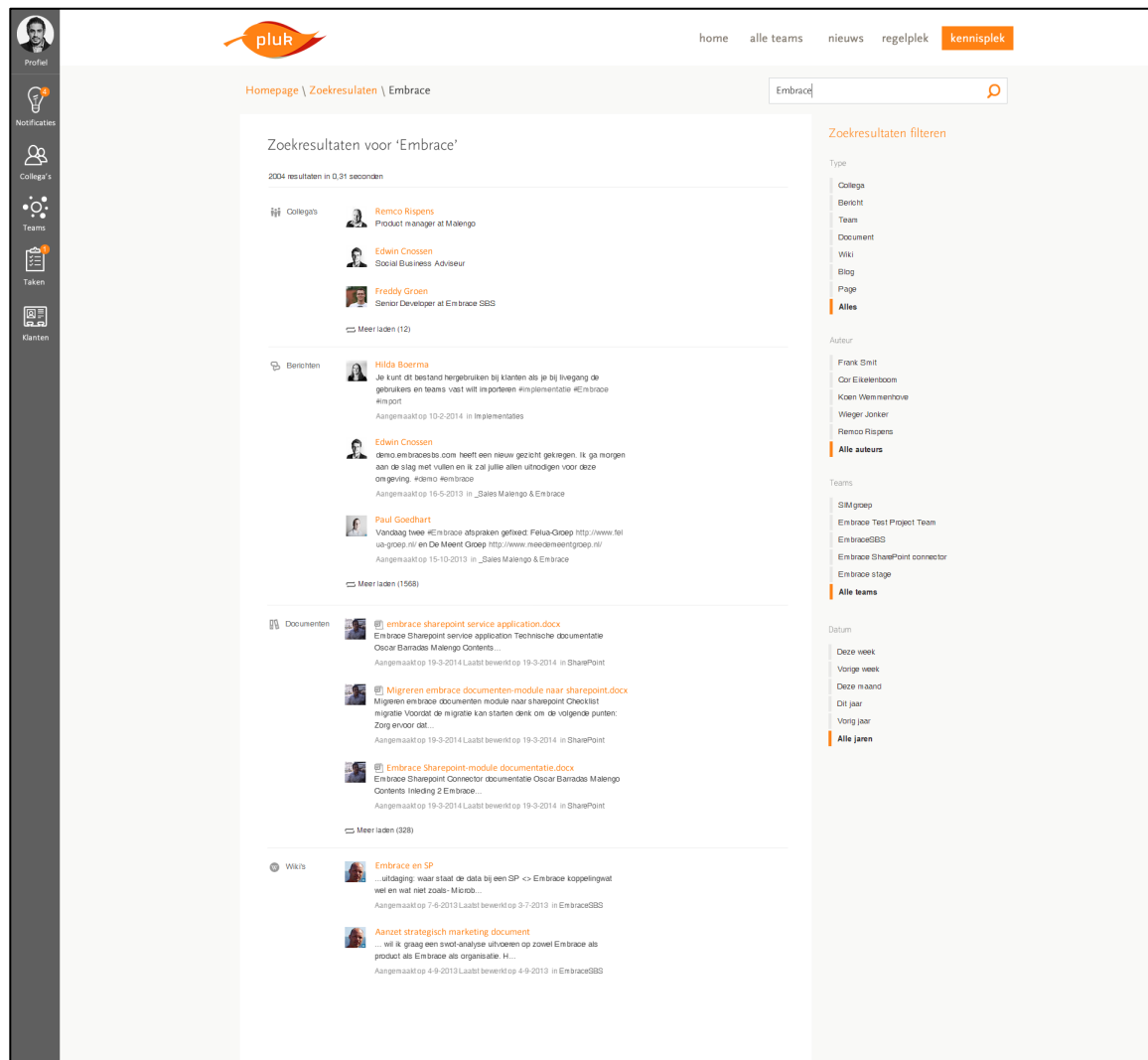
Mobile intranet access is supported for all intranet content, but it's currently limited due to network constraints involving Citrix. Neither has the user interface been optimized for mobile yet.

SEARCH

The Accolade team chose Lucene because the search technology behind the intranet needed to be feature-rich and easy to implement, as well flexible and fast.

"Because of our plugin architecture, it's easy to include search results from an external source, or even replace the default search engine," says Jeroen Scholtens, .NET developer, Embrace SBS. "In this case extra results from SharePoint Search are included with a plugin."

Users can refine search results to only those from their team, or from an external source. They may also search by a given interval of time (weeks, months, years) backward from the current date, as well by content types like documents, microblog posts, pages, teams, and profiles. All of these options can be enriched with plugins. The reason for this rich set of refinement options is to give users the tools they need to filter instead of search. The filtering capabilities are illustrated in the image below.



Pictured: Accolade Intranet: Search Results. Search results are presented in real time. Employees can filter by different categories (documents, colleagues, authors, and so forth) or can choose to search only within a specific team.

RESULTS AND ROI

Like many companies, Accolade doesn't quantify the results of its intranet in hard numbers. "We think our intranet is successful because we deliver better services to our customers thanks to our intranet," says Rinsma. "With the help of the intranet, knowledge is easily accessible, complete, and correct. Thanks to social task management we have connected the front office with the rest of the organization and we can now share responsibility. This stimulates entrepreneurship and a drive to work together, which is one of our main values."

Rinsma points to several other gains from the social intranet:

"Time saved. Since the implementation of the intranet, we have saved a lot of time. Thanks to the information in the client directory in the knowledge base and the integration with Lync, information is now completely open and transparent to our staff."

"Fewer errors. With better information at our fingertips we make less errors in the phone calls with our customers. It saves time for our front office department, and it also saves a lot of time for our customers. We are more in control of the situation. We have about 35,000 maintenance requests (phone calls) a year, so making this process easier saves a lot of time. For example, an employee from the front office shared this:

"We store every contact we have with our customers, and it's visible on the intranet. It seems logical now, but we didn't do it two years ago. When a customer called in the morning and talked with colleague X, and he called back in the afternoon and got colleague Y, colleague Y didn't know the customer had called earlier. Now we can see when a customer called, what colleague X said to them, and give the same answer."

"Contribution to performance goals. The intranet helps with achieving our goal of answering 80% of the customer questions directly at the front office level. The staff from the front office is now able to answer 80% of the questions they receive daily, because:

- **Information is correct:** They find all the correct information (documents, processes, forms) in the knowledgebase on the intranet.
- **Departments are now connected:** The intranet has connected the different departments with each other. The intranet stimulates colleagues from other departments to improve the quality of the information in the knowledgebase on the intranet in a user-friendly and easily accessible way.
- **Employees know what's going on:** Employees know what's is going on in the organization because of the corporate news, microblogs from colleagues, and social media integration on the intranet. And the 20% of the questions that the front office cannot answer directly are also visible on the intranet. Accolade continuously tries to improve their processes, to make sure the front office can answer more questions directly (and can help the customer better and more quickly).
- **Information is customer-centric:** All the information is stored at customer level. An employee doesn't have to search in separate document management systems to find letters that are sent to customers in a specific area. The company stores all the letters at customer level, so the front office department can easily find this information.

- **Single sign-on provides ease of use:** Users open all their applications through the intranet without having to sign in again. This example from a front office employee illustrates this point: 'In the beginning, we had to search for information in different systems and the customer had to wait for us to find all the pieces of information. Right now, there is just one source of information: the intranet.'

"Control. The front office is more in control of the (20%) of customer questions they cannot answer directly, because they now have:

- **More complete information:** They have full insight in the expertise of colleagues now because the organization encouraged colleagues to add their expertise in an effort to enrich their personal profiles.
- **Visibility into task status:** Task status is completely visible. It is clear which colleague will complete the task and what the status is (and the business value is transparent). They also have full insight in availability of colleagues and departments.
- **Better access to expertise:** It is easier and more transparent to ask a 'who knows something about ...' question. You don't have to call different departments anymore to find out who has the expertise. Within a couple of minutes, you have the names or department of colleagues who know more, and due to the Lync integration you have insight in their availability."

"Customer satisfaction. Customers are more aware of the actions our front office staff have to take if they can't address customer questions directly. Status and expectations are clearer. And because of clearer expectations, our customers complain less, and when they do complain, we are more in control because we reported all the contact we had with the customer, including contact we had on social media. It is all transparent in our systems and easily findable on the intranet. The knowledge base on the social intranet is the absolute truth. Before, our front office staff had to search local storage or in mailboxes for the right forms or documents, and old versions of forms were often sent to customers. That doesn't happen anymore; the right information is stored on the intranet."

"Linking employees with organizational objectives. The new intranet has provided employees a better understanding of organization's objectives. For example, for our organization it is really important (because it saves a lot of money) to prevent our homes from being empty. When a customer gives notice that they will end the rental agreement, we try to rent the house immediately at the end date to another customer. On our intranet we present this information in a graph that is updated daily. It's great for our employees to have complete access to this information, but because of the social component of our intranet our colleagues can comment on it also. So we connect the social with the business, and our colleagues can contribute to our organizational goals by helping to decrease the amount of time our homes remain empty."

The old intranet was mostly an information-based tool, with some corporate news, some HR forms and procedures, and the employee birthday calendar. Only select employees could add information. "With the new intranet we have a social intranet," says Rinsma. "Every employee can now add information and update the intranet. It stimulates entrepreneurship and initiative, and that's the empowerment we want our employees to feel. Entrepreneurship is one of our main values."

Positive User Feedback

In addition to tracking the ways the intranet has returned value for the organization, the team is also tracking positive user feedback. Willems-Sloot shared a few examples of these positive responses:

Jelly van der Werk, communications employee: "I am taking a course for communications employees and the teacher presented a list of attributes for the 'ideal social intranet.' The teacher told us that hardly any organization had an intranet that looked like this, but Pluk has almost everything on the list! Thanks to Pluk, I can:

- email less,
- see what my colleagues are working on,
- navigate more easily to the systems I need,
- scan our corporate news,
- find the information I need, and
- connect with colleagues who are in my project team, or wherever."

Fred Hesselink, advisor to the board of Accolade: "Pluk is:

- **Easy and accessible:** I can share information in a very simple way.
- **Unified:** I don't have to send documents anymore or save them on local storage, rather, thanks to Pluk, information is saved and accessible in one place.
- **Flexible:** It is possible to target information to your specific audience."

Lutske Banga, information advisor, Accolade: "Pluk is a central place to share knowledge and experience with colleagues, and allows me to respond to questions and activities immediately. I have access to a lot of information about my colleagues, ongoing projects, tasks and information about our renters, and what have you. It gives me access to all the applications and knowledge.

- **My morning starts on Pluk:** I check the news and microblog messages. Since we've had the social intranet, I notice we're able to share information with each other easily, and because we can, we share more.

- **Pluk has improved how I work with colleagues:** On the social intranet I can work together with colleagues in project teams. We share documents and edit them together and can respond to each other immediately.
- **Pluk helps me parse information:** I can judge for myself which information I need or find interesting, and join teams that can tell me more about that information."

Usage

Willems-Sloot provided a few usage statistics (as of August 1, 2014):

- 205 user accounts
- 191 have a profile photo
- 184 were active in last seven days from when data was shared
- All users are a member of five teams, on average

The most popular teams are:

1. Team Accolade: 190 members
2. Team Customer and House: 110 members
3. Team Daily Maintenance: 66 members
4. Team New Ways of Working: 43 members
5. Team Finance and Information: 40 members
6. Team HeerlijkHelderSchrijven ("How to Write Letters/Emails/etc." to customers): 35 members
7. Team Front Office: 35 members

LESSONS LEARNED

"Think big, act small" is a big piece of advice Accolade team members say they would give other teams about to embark on an intranet redesign project. "Don't put the perfect situation into one big project, rather make sure the project is divided into smaller steps that are based on a clear vision, and build it slowly," says Rinsma.

Rinsma and Willems-Sloot share some of the team's other lessons learned:

- **Social tools should serve a business purpose.** "Make sure the (social) intranet is integrated into your processes. Some separate social tools sound like fun but you have to work hard to achieve a certain adoption rate. Some people will simply not use them so make sure employees need the intranet to do their work. When they work with it they will soon see the advantages of the social components."

- **Involve employees early.** "Make sure employees are involved in an early stage of the project. Don't wait to involve them until you already have a functional design and let them tell you what they think of it. Rather, involve them early. Ask them what frustrates them in their work. Ask what a perfect (work) day looks like. Ask them which processes can be improved. You should involve users as early as possible during the design process but in order to allow them to really contribute they should first have some basic understanding of what a social intranet is. You may want to start with a beta or a very simple first version to help users to fully understand concepts like microblogging and working in teams."
- **Find creative ways to involve people and generate feedback.** "Staff can be involved on different levels. For example, you can ask staff to help think of a new name for the intranet. Our staff came up with the name of our intranet, Pluk. As another simple example, we interviewed colleagues and found that a lot of them are looking for the company logo. So we put that on the intranet as well."
- **Pay attention to the customer.** "You have to continuously pay attention to the internal customer (your colleagues). Don't think the intranet will work if you don't put in effort."
- **Determine the governance structure up front.** "Make sure to arrange the governance well. Who is the 'owner' of the social intranet? Who is responsible for keeping information up to date?"
- **Work closely with IT.** "In the beginning (of the bigger project) we didn't work close enough with the IT-department. Now we work together as a team with the IT-department and can handle the dependencies better. For example, because the intranet is integrated in our primary systems, an update of one of our primary systems also affects our intranet."

Klick Health (2015)

Using the intranet: Klick Health is the world's largest independent digital health agency. It is laser-focused on creating solutions that engage and educate about life-saving treatments. The company helps inform and empower patients to manage their health and play a central role in their own care. Every solution the company crafts hinges on in-house expertise across the digital universe: strategy, creative, analytics, instructional design, user experience, relationship marketing, social, and mobile.

Headquarters: Toronto, Canada

Number of employees the intranet supports: Over 400

Company locations: Headquartered in Toronto, with teams in Chicago, New Jersey, New York, North Carolina, Philadelphia, and San Francisco

Annual sales: \$100 million

Design team: The core team is comprised of eight dedicated full-time employees, however anyone at Klick has the ability to contribute to Genome.

In-House: Aaron Goldstein, COO; Benjamin Nadler, Senior Director, Internal Operations; Andrew Woronowicz, Director of Business Process & Systems; D'Arcy Rittich, Chief Technical Strategist; Rey Crisóstomo, Technical Architect; Rob Brander, Senior Application Developer; Alex Chesser, Genome Developer; Alexey Davydov, Senior Application Developer

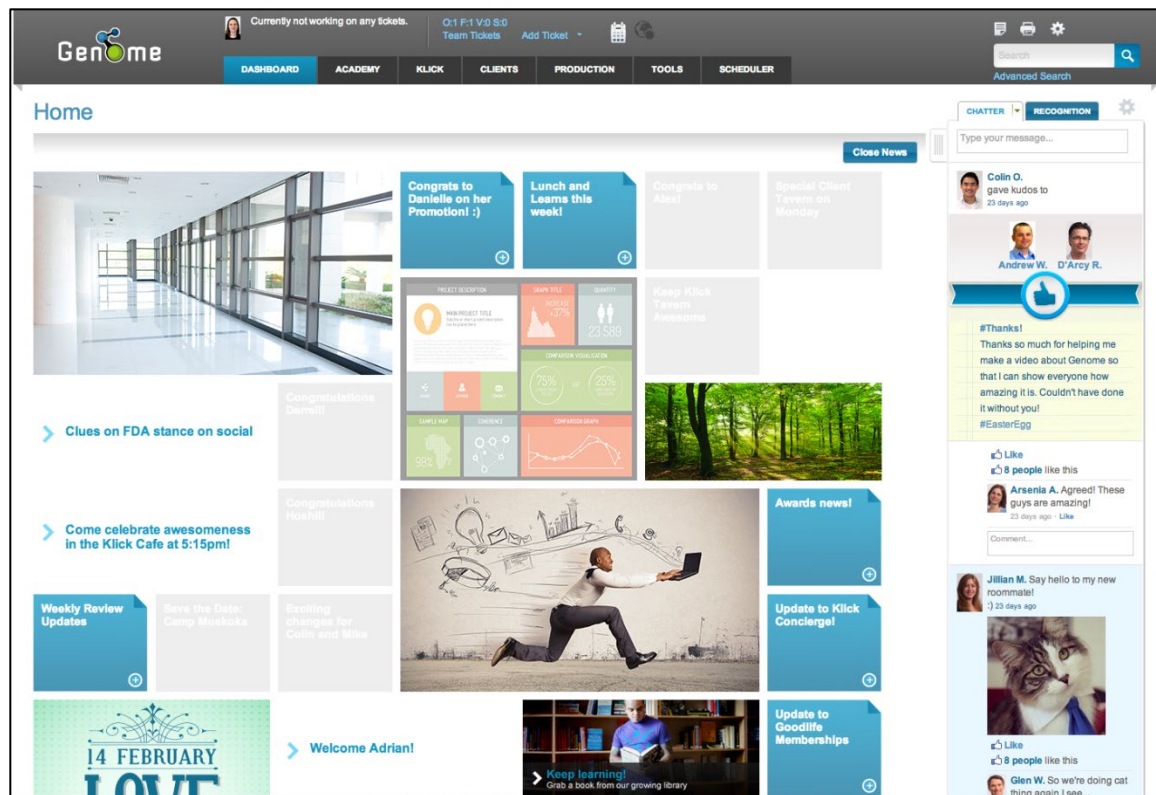
SUMMARY

Genome, the intranet for Klick Health, is far more than a way to read news. The intranet is integral to each employee's everyday activities, providing a wealth of tracking and management tools that help employees get their work done, while allowing the company to collect and use work data to drive decisions and track successes.

The intranet is a custom-built, in-house system supporting the organization's business goals. It started as a task management system for tracking progress and communication around tasks and grew into a suite of tools that support Klick Health's business functions. This is a natural fit for an organization that prides itself on data-driven solutions.

The homepage gives a brief introduction to the site, highlights news items and recent social activity, and provides quick access to project and ticket information. Clicking on a plus sign in any item reveals more information. The items become greyed out after the user has clicked on the corresponding news item. (Nothing happens when users hover over them.) The color change is used as a means of highlighting new, unseen items. The most recent items are displayed on the homepage. Each news item has an expiry date, after which it is automatically removed from the homepage. If users click *close news* their *Ticket Homepage* appears instead.

The homepage has a clean and minimal design. Interior pages focus on content and functionality with minimal visual distraction. The site maintains a clean and unified appearance with plenty of white space balanced with a bright palette of colors to highlight key areas, draw attention, or indicate status.

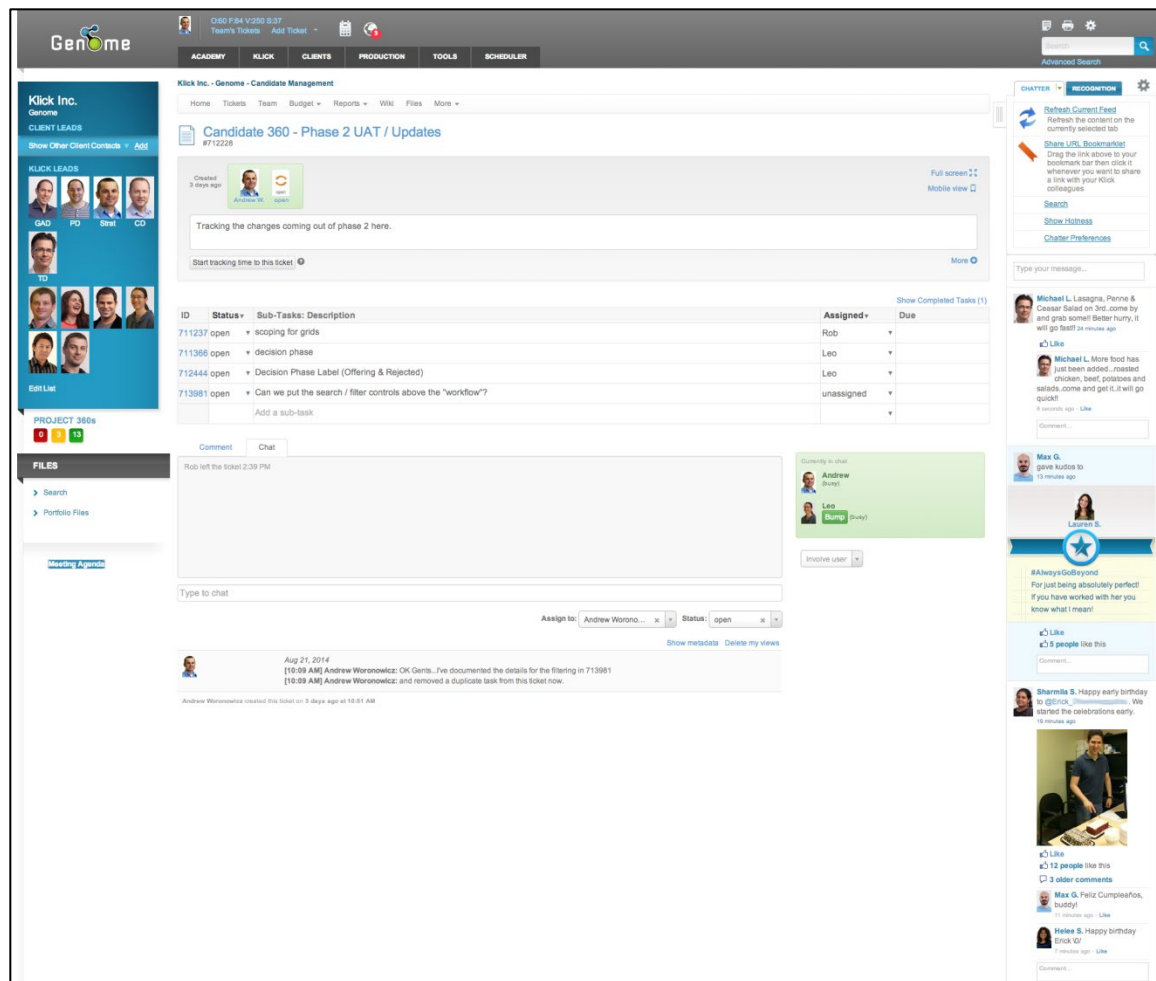


Pictured: Klick Health Intranet: Homepage. The homepage of the Klick intranet, Genome, highlights a few news items, the latest social activity, and gives users access to project information (center of page) and tickets (top of page).

The core of the intranet, the ticket page, remains the most used page. Tasks that need to be completed are summarized in a ticket and assigned to an employee. Each ticket appears on its own page, where employees can add sub-tasks as needed and assign tasks to members of the project team.

A list of employees associated with the project or task appears on the left side of the page, together with images of each employee. In the center of the page, beneath the task summary and any sub-tasks that may exist, is a chat or comment window that allows team members to add notes or have discussions around the task.

This alone would be helpful, but the site goes one step further. Anyone else currently viewing the ticket is shown as *Currently in Chat* to the right of the chat window. This allows colleagues to contact each other instantly to ask a question, clarify an issue, or discuss a solution. Any chat or comment associated with a task is summarized and stored with it. Employees can also track their time by clicking the *Start tracking time to this ticket* button.



Pictured: Klick Health Intranet: Ticket Tracking. Ticket tracking is at the core of Klick's intranet. *Tickets* allow employees to track their activities and progress. Chat and commenting functionality keeps all conversation surrounding an activity in a single location.

A unique feature of the site is a weekly review system called *Project 360*. This system asks team members to provide a "gut feel" about how a project is going. This allows employees to voice concerns early, before they grow into larger issues. Other team members can then weigh in to determine if the issue is surmountable or if it has the potential for larger ramifications, such as derailing a project, blowing a budget, or extending a deadline. This tool acts as an early warning system if things are starting to go wrong.

Rather than being a tool where employees may be hesitant to voice a concern, the tool brings what may be minor concerns to the foreground, ensuring the team is aware of the issue and moving toward a solution. This helps eliminate smaller, avoidable issues that could grow into insurmountable obstacles if left untended. The organization has a sense of shared accountability for projects, and as such, employees are comfortable voicing concerns early.

Team members can easily provide feedback about a project. They can indicate if they think the project is going as planned, has problems, is exceptional, and so forth. Feedback is given via an easy two-step process: first the user selects the *gut feel* and then provides a brief comment or concern regarding it. When the user clicks *Save and go to next step*, notifications are automatically sent to team members (for every status except *green*). At the same time, project homepages are automatically updated so everyone can see the most recent status and comments. For the user giving feedback, “*next step*” refers to any other projects the user may have to review. The system leads them through all projects until they are done for the week.

Project 360 | Client 360 | Project 360 | Your Goals

Project 1 of 1: Relyant - Consumer Marketing - Q4 Mobile Campaign (Active Production)

1. How do you feel about this project? What is your "gut feel"?

Green | **Yellow** | **Red** | **Awesome!**

Everything is going as planned. Nothing to be concerned about. | I have growing concerns that problems are developing on this project. | There are major problems on this project and action is needed to correct it. | This project is exceptional and the team should take notice!

2. Add in your comments or concerns

Additional Information

Financial Health

External Value: \$52,997.60

Original Estimate: \$44,000.00

Forecast: \$47,270.20

Go to budget page

Burn Rate

	7 days:	30 days:	Remaining:
hrs	0 hrs	18 hrs	179 hrs
\$	\$0.00	\$3,171.80	\$28,640.00

Based on the burn rate for the last 7 days, this project is expected to consume the remaining budget in 0 days

Pictured: Klick Health Intranet: Project 360. Project 360 is a tool on the Klick intranet that allows employees to give “gut feel” feedback about a project’s progress. This weekly check allows team members to flag potential issues early, and gives colleagues a chance to address, acknowledge, or discuss any concerns.

Encouraged by the success of their other tools to track progress and flag issues, the team moved into building a tool to assist with hiring. *Candidate 360* strives to turn hiring into a predictable, repeatable, data-driven process. The team started by creating an ideal persona to fill every role at the company. The persona was based on the skills and personality types of employees who excel at the company and those who typically do not. This resulted in two lists: one of success characteristics and one of potential issues.

The tool helps the company manage the hiring workflow, collecting and applying data at each step along the way. Candidates are tagged with the positions for which they are being considered. Genome detects calendar entries for interviews and sends an information pack to interviewers in advance. The information includes details about

the given candidate and a list of criteria to use in their evaluation. Interviewers also receive a summary of the candidate's evaluation, including comments from all interviewers.

Post-interview, each person adds comments, reviewing the candidate based on the list of criteria. This can be done via desktop or mobile. Genome automatically sends a reminder to interviewers to complete the survey.

Automating the system allows the company to learn more about what makes a successful hire, as well as fine-tune the hiring system. Hiring can be more systematic, collecting feedback about candidates and helping determine what makes someone a good fit for Klick. The system even helps identify which employees are good at interviewing and assessing candidates.

Candidate information is summarized at the top of the page and includes a cover letter, URL, or resume, as appropriate. The system can include test results and interview responses, a "scorecard" for applicants, and a list of potential issues (called "Watch Outs"). Discussion and comments can be added just as they can in the task management tool.

courses. Within *Klick Academy*, *Klick Talks* allow an employee to ask any question and get a video response within days. It may seem daunting to provide this type of turnaround for a video response, but the fact that the response is on video is actually a factor in how quickly the question can be answered.

First, an employee asks a question within *Klick Academy*. Then someone on the content team finds a subject matter expert in the company to answer the question, walks to the subject matter expert's desk with an iPhone in hand, and records the expert's response. The video is quickly uploaded from phone to intranet for all to view. That's it.

The process makes sharing knowledge simple and easy for those asking and answering questions and is minimally labor-intensive on the content team's side. Rather than compose an email or write an official site tutorial, experts simply answer the question in a casual way. Expert knowledge is quickly recorded and made available in an easy-to-consume format. The success is seen in the number of talks, which has rapidly grown to 740 videos and counting. This simple approach lowers the barrier for experts to share their knowledge, as well as for employees to seek it out.

Users can browse the *Klick Talks* videos with the newest and most popular highlighted. The featured expert is shown, along with the topic and length of the video response. Employees can also submit a question via a simple form that guides users along by saying, "Do you have a question? Can't find the answer you're looking for? Submit your question here to have it answered within days!"

Genome

Currently not working on any tickets. Q2 P3 V3 S3 Team Tickets Add Ticket

ACADEMY CLICK CLIENTS PRODUCTION TOOLS SCHEDULER

NEW! Regulatory Corner Welcome to Regulatory Corner, Klick's resource for information on FDA regulations

NEW! Genome Team Mojo Check out our Genome team's awesome stories!

Upcoming Lunch & Leams

SEARCH ACADEMY: [input] [button]

> The Relentless Pursuit of Awesome At Klick, awesome is our standard. To get there, we focus on Culture and Genome. Find out about Klick Culture and Genome, what gets rewarded, recognized, how we make decisions and the manifestations of Culture at Klick.

> Click Talks Klick's proprietary social learning platform is all about what you want. Now. Ask a question, any question. 3 minutes or less.

Newest Talks	Most Popular This Month	Do You Have A Question?
Happy Birthday Eliasi from your Klick family Sep 9, 2014	What is the wellness program at Klick? 0:29	Do you have a question? Can't find the answer you're looking for? Submit your question here to have it answered within days! Submit Question
Q2 2014 Celebrating Success Aug 15, 2014	Colin messed up 0:05	
What do I do if I suspect a website is down? Aug 7, 2014	The Awesome Report - July 2014 4:00	
Responsive Web Design: Fundamentals Aug 7, 2014	Q2 2014 Celebrating Success 9:47	
How to install a printer driver Aug 6, 2014	Happy Birthday Eliasi from your Klick family 1:00	

VIEW ALL TALKS >

> Core Courses Everyone needs to have a foundation, and Klick Academy core courses intend to provide it. If you're new, start here. 20-45 minutes.

> Elective Courses Consider these the courses you need to earn your degree, more specialized, but available to anyone from any major. 3-20 minutes.

> Town Hall Our Town Halls are the highlight of the end of the year, and a great place to get an overview of Klick.

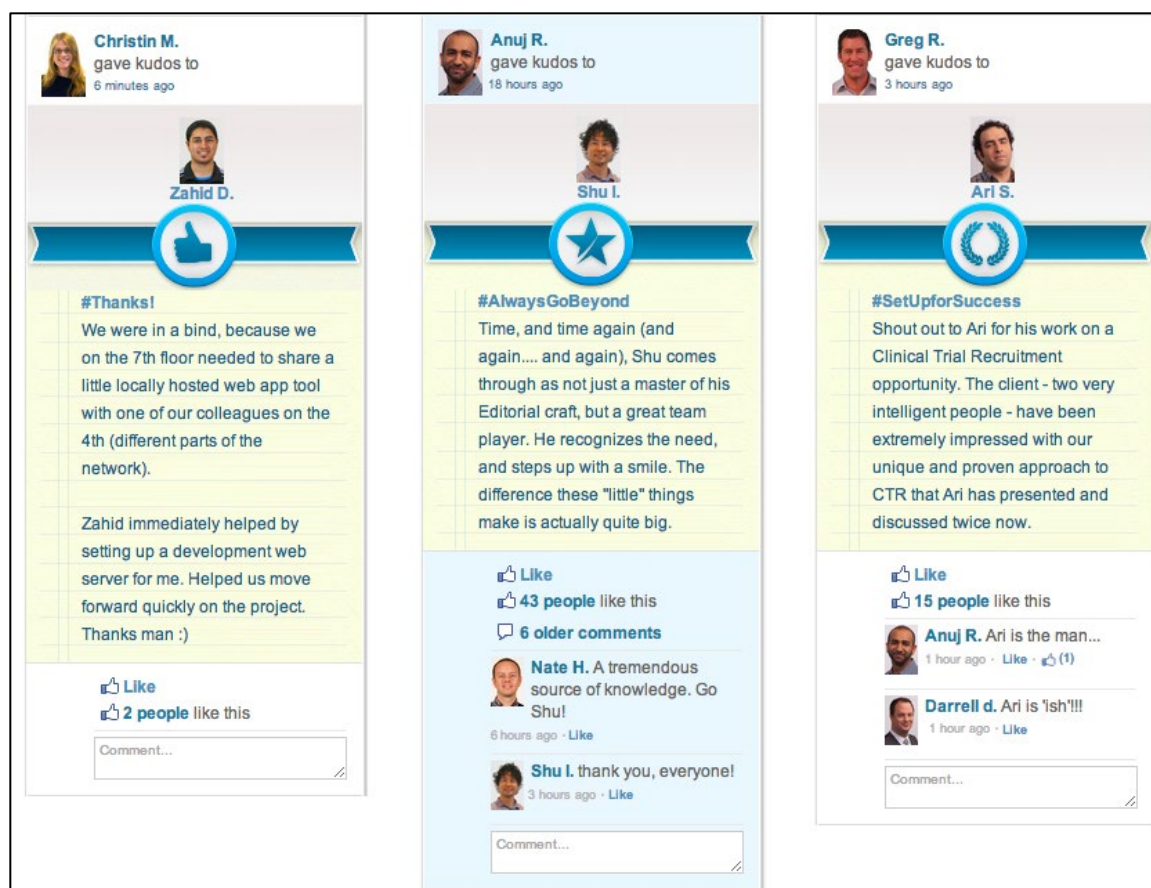
> Managers Content Check this out for tools specific for current and future Managers at Klick.

> Lunch & Leams Live, in-person training, with increased offerings, breadth and a lot more bacon. 20-60.

> Resource Library A list of reference materials, be that department-specific content, management tips or links to things that your colleagues find useful.

Pictured: Klick Health Intranet: *Klick Talks*. The *Klick Talks* feature on the Klick intranet is a knowledge base of in-house, topic-expert video responses to employee questions. Any employee can ask a question, then a content team member will find an in-house topic expert, record the expert responding to the question, and upload the video to *Klick Talks* for all to view (and comment on or discuss).

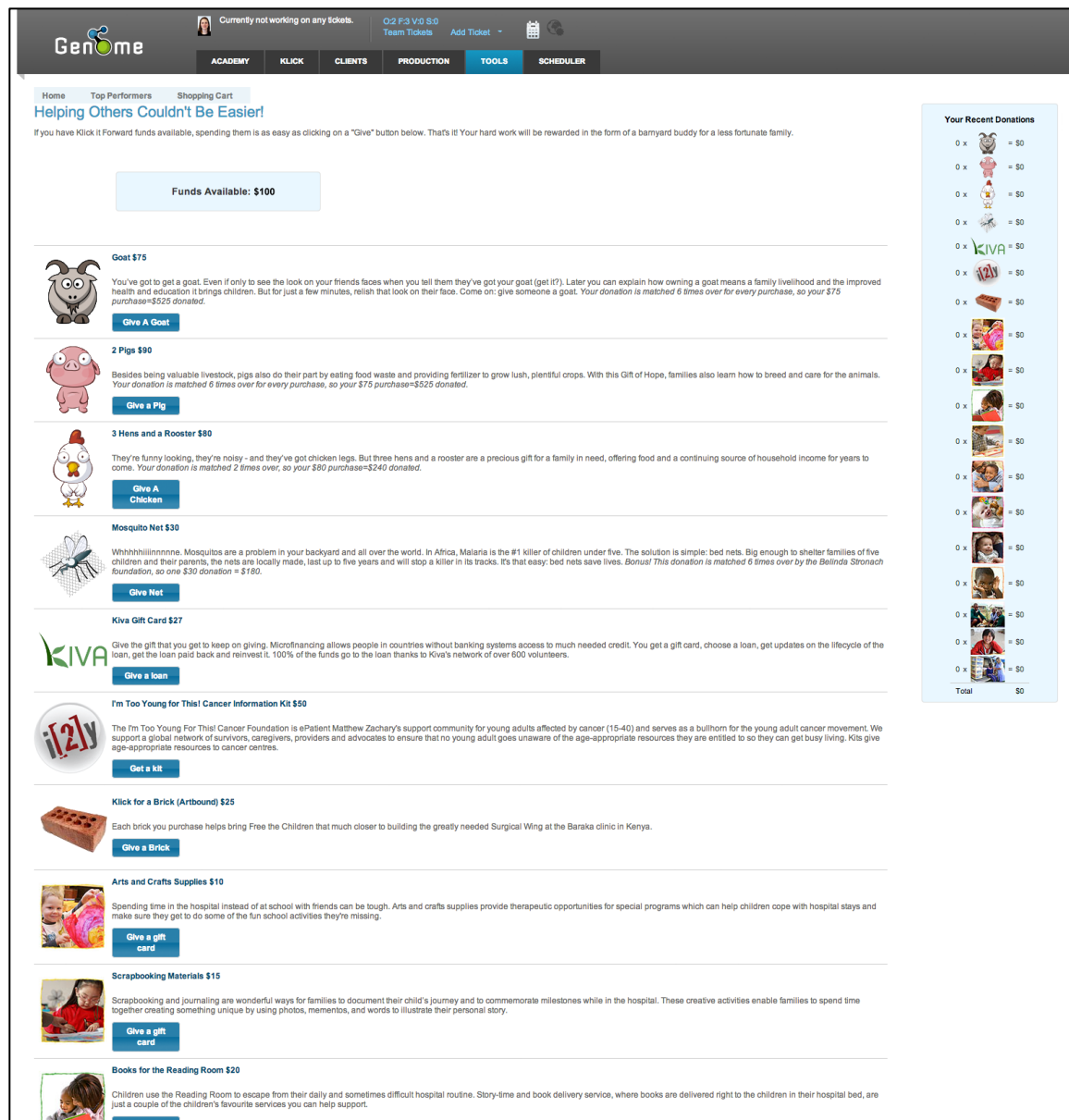
The most successful tools are often the simplest. Genome allows employees to easily send “kudos” — recognition for work well done — to peers via their social networking tool, *Chatter*. Employees need only enter a name, message, and select a badge to represent their gratitude. Between sending kudos and liking (or commenting on) a sent message, *Chatter* has an average of 513 acts of employee recognition every day, a sure testament to how popular and easy to use this tool is.



Pictured: Klick Health Intranet: Chatter. The *Chatter* tool makes it easy for employees to recognize one another for work well done. Employees can send public thanks to colleagues for reliability, dependability, or going above and beyond. The tool encourages use by its simplicity, thus helping to spread positive thoughts around the organization. Kudos that employees receive are displayed on their profile pages.

Klick uses the information it gathers to encourage philanthropy within the organization. The company rewards its employees with credits to donate (or "Klick it Forward") to the charity of their choice. For example, many employees buy malaria nets in Africa, fund microfinance loans around the world, donate livestock to Sub-Saharan Africa, or provide toys and art supplies to patients in a local children's hospital.

The *Klick it Forward* tool summarizes available options for employees by using a picture to illustrate the donation, listing the dollar amount associated with each type of contribution, briefly describing the donation and why it is important, and indicating if the company will match the donation. For example, a donation of \$75 to provide a goat to a family is matched six times over, for a total contribution of \$525.



Pictured: Klick Health Intranet: *Click it Forward*. The *Click it Forward* page summarizes available charity options that employees can donate to, including any funds the company will match.

The team never stops thinking about how the site and company can improve. Genome offers a wealth of tools to employees, which results in a treasure trove of data. The team is constantly thinking about the data in new and meaningful ways. For instance, by combining data about employees from the business travel database with what's known about them from project management tools, the team created *In-Flight Reading*. This tool is a "data by-product" that recognizes when employees are traveling to a client and emails them an updated project dossier summarizing all major items, change comments, and other useful information.

Iterative designs lead to continual improvements in the Genome user experience. The team has created a solid work system that continues to evolve, making the most of the wealth of data collected in order to streamline and enhance employee workflows and experiences.

BACKGROUND

Killing Email

The impetus for creating Genome stemmed from a deep hatred of email. “Not only is email a marginal improvement to the traditional office memo, but it is also the ultimate tool to let other people re-prioritize your day for you,” says Leerom Segal, Klick Health’s co-founder and CEO. “That said, we didn’t just want to get rid of email and replace it with another product, or suite of products. We wanted to create a centralized set of task-tailored tools, to allow for big picture oversight of all the moving parts across the organization.”

So the only solution was to build a custom, in-house intranet system that would address *all* of the company’s business requirements in one place.

Genome began as a task management system, aimed at capturing the entire communication stream around each task, providing clear accountability for each and every task and delivering high-level reporting on all of the moving parts. It then evolved into a full-featured project management system when the team added the company’s suite of custom-built financial tools. The addition of these tools created a direct link between a client contract, work orders defining the number of estimated labor hours, up-to-the-minute spending against every one of those hours, and invoices based on specific project milestones. With these additions, Genome was a huge leap forward in terms of project management capabilities for the company.

“These tools opened new doors with respect to measuring and monitoring the financial success of projects and allowed us to easily and expediently detect if and when projects were at risk — even early in their lifecycle,” says Andrew Woronowicz, Director of Business Process & Systems. “So we could investigate and resolve any issues before they became major obstacles.”

The next phase of Genome’s lifecycle focused on a weekly review system that asked all team members involved on a project to provide a simple “gut feel” about how a project was going. These weekly reviews, ultimately named “Project 360s,” ensure that all team members have a platform to voice their concerns, where the entire conversation surrounding a project is woven into a single, cohesive story that’s understood by everyone on the team. Capturing these conversations in plain sight of project team members means that potential problems can be intercepted before they became critical.

“This simple social engineering has enabled us to build lightweight feedback loops that provide an excellent early-warning system,” says Woronowicz.

The next additions to Genome also made a huge splash. Adding the social tool, *Chatter*, to the site in 2014 bridged the gap between company growth and its ability to maintain close connections among co-workers.

“As an organization, we had been growing at such an incredible pace that we were faced with the challenge of how to maintain our close-knit community. With *Chatter*,

we became small and intimate again,” says Woronowicz. “We essentially felt like a start-up all over again.”

The most recent addition to the Genome arsenal of tools is *Candidate 360* (rolled out in July 2014), which gives the organization a data-driven approach for managing the end-to-end lifecycle of the hiring process.

All these individual features of the Genome platform add up to a holistic system that not only kills email (the original mission), but returns value far above the sum of its parts.

“Without a doubt, Genome has become part of Klick’s DNA, providing our people with a personalized, simplified, and enhanced work experience — every step of the way,” says Segal.

Genome

HOME KLUCK TOOLS SALES PRODUCTION SCHEDULES REPORTS

Melanie Smith: My Tickets 0:20 F:79 V:133 S:1 | Team's Tickets | Add Ticket

Search 60

My Schedule | Print Version

Home

Name	Billed Pct	Int Hourly Pct	Ext Hourly Rate	Ext Value Created	Client Sat	P360 Adherence	Red tickets
Andrew Melnico						80%	
Jeff Postilino	10%	80%	\$XXX.XX	\$ XXXX.XX		90%	
Andrew's Team	20%	90%	\$XXX.XX	\$ XXXX.XX		65%	
Target	100%	100%			4.2		

View detail in timeframe: 90 days compare to: -- none -- GO

Hours Tracked Project 360

Click News (1) Open Tickets (20) Open Tickets From Me (79) Tickets to Verify (133) Subscribed Tickets (1)

Title	Creator	Posted
Important Reminder - Performance Appraisals	Jeff Combs	Jun 19, 2012
Introducing: Who is... Klick Talks	Terry Eaton	Jun 18, 2012
New Boardrooms & Theme	Sam Rogers	Jun 18, 2012
Wi-Fi Password Changed	Jeff Daniels	Jun 18, 2012
If you donate books...	Ricky Ho	Jun 18, 2012
Lunch & Learn: Microsoft Visual Studio & MSBuild	Philip Franz	Jun 15, 2012
New process for handling Contracts	Mikko Koupio	Jun 14, 2012
IMPORTANT: We need your help!	Chet Andrews	Jun 13, 2012
Two-Step Authentication	Sandra Baker	Jun 11, 2012
Wednesday video games cancelled this week...	Jessica Vorheese	Jun 11, 2012

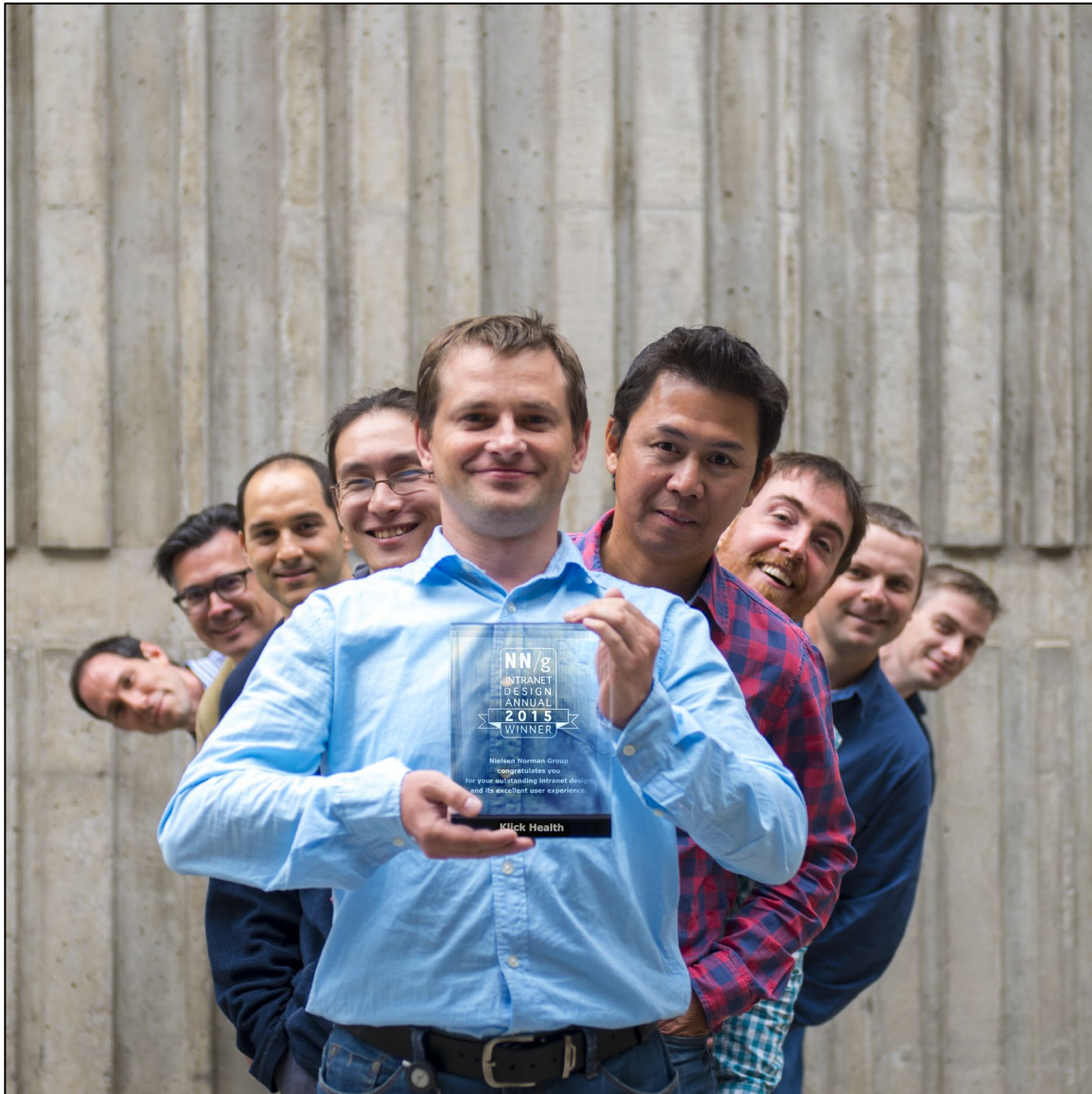
NEWS ARCHIVES POST

The Klick News tab is opened by default because you have unread news items. After reading your news items, your open tickets will be the default tab.

Pictured: Klick Health Intranet: 2012 Homepage. The Genome homepage from 2012.

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INTRANET TEAM



Klick team members (left to right): Aaron Goldstein, D'Arcy Rittich, Benjamin Nadler, Leo Horie, Alexey Davydov, Rey Crisóstomo, Alex Chesser, Andrew Woronowicz, and Rob Brander.

GOVERNANCE

Ownership

Klick's COO Aaron Goldstein is the person who originally conceived of the idea for Genome. Over the years, his Genome team has grown into an eight-person, in-house department, responsible for the ongoing development and execution of the platform. In addition to this core Genome team, many other Klick employees, including members of other technical and creative teams, contribute to evolving the system in

their downtime. The tools and access to Genome have been built in a way that allows people beyond the core team to quickly build applications, while the core team maintains control over privacy, security, and data integrity.

“Having the ultimate ownership rest with the COO is critical to our success,” says Woronowicz. “It ensures that Genome is being directed with the entire organization in mind and not focused on the objectives of one particular division.”

The fact that Genome now serves the objectives of the entire organization is easily illustrated by asking employees from different parts of the organization how Genome affects their daily tasks. Production teams say that tickets clearly identify tasks and accountability, while project management people cite estimation, time-tracking, and reconciliation tools. Likewise, client services will point to their client management toolset, complete with project, portfolio, client-level metrics and forecasts, and so on. Genome makes everyone feel like they have a piece of the pie.

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Senior Director, Internal Operations	• Oversee Genome team • Serve as liaison between internal teams and Genome requirements • Drive the vision, specifications, and ultimate delivery of Genome updates
Director, Business Process & Systems	• Coordinate internal team needs and Genome requirements • Drive the vision, specifications and ultimate delivery of Genome updates
Chief Technical Strategist	• Oversee technical team and manage vision for overall Genome architecture and direction
Technical Architect	• Maintain site architecture • Oversee both front-end and back-end development
Application Developer	• Develops back-end, including C+, SQL, and web service development
Web Developer	• Develops front-end, including HTML, CSS, Angular JS, and C+

Figure 5. Klick Health Intranet Team Responsibilities

USERS

All of Klick’s 400+ employees use Genome every day, and not because it is a corporate directive, but because the tool is tailored to match the way employees do their work. Employees in all areas of the business use Genome to manage production

at a macro level, monitor activity and trends, and evaluate performance against metrics. For example, employees on the production side of the business will keep Genome running to track their daily tasks and receive alerts about critical information.

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	genome.klick.com
Default Status	Genome is the first and last tool that all employees use each day. Employees often make Genome their default homepage, but that is by choice, not a corporate mandate.
Remote Access	- Users can access Genome from any internet connection, not just from within Klick's corporate network. - Two-factor authentication ensures access is secure. - Users regularly access Genome from home, client offices, and even during daily train commutes to and from work.

Figure 6. Klick Health URL and Access Information

DESIGN PROCESS AND USABILITY WORK

An Iterative Design Approach

Although the Genome Team follows traditional design practices — from contextual inquiries and requirements documentation to wireframes and usability testing — iterative development is the special sauce behind Genome's success as a user-centered platform. "The biggest secret [to success] is simply involving users in an iterative (phased) development process," says Woronowicz.

Iterative rollouts result in well-refined tools that are not only used, but also loved by the user base. Each round of development at Klick is ushered through the iterative process of wireframing, building, releasing the beta, and testing with a group of select users who provide feedback for the next release. The frequent feedback loops, combined with contextual inquiries focused on how employees truly use the system, ensures the expressed and observed needs of employees are part of the solution. This dramatically reduces any resistance to adoption and change. "These sessions also provide a logical opportunity to re-visit the roadmap and make subtle course corrections based on new inputs or changing landscapes," says Woronowicz.

By the time the tools are released company-wide they have been highly refined from feedback, yet the team still keeps the feedback channels open. For example, when

the team released the company's internal social tool, *Chatter*, they asked users to make suggestions using the hashtag, #dogfood, because as Woronowicz explains, "we were truly eating our own dog food by using the very tool itself to provide a mechanism for feedback."

The #dogfood posts with the most likes were an indication of updates that were most pressing, and they were moved to the front of the development queue.

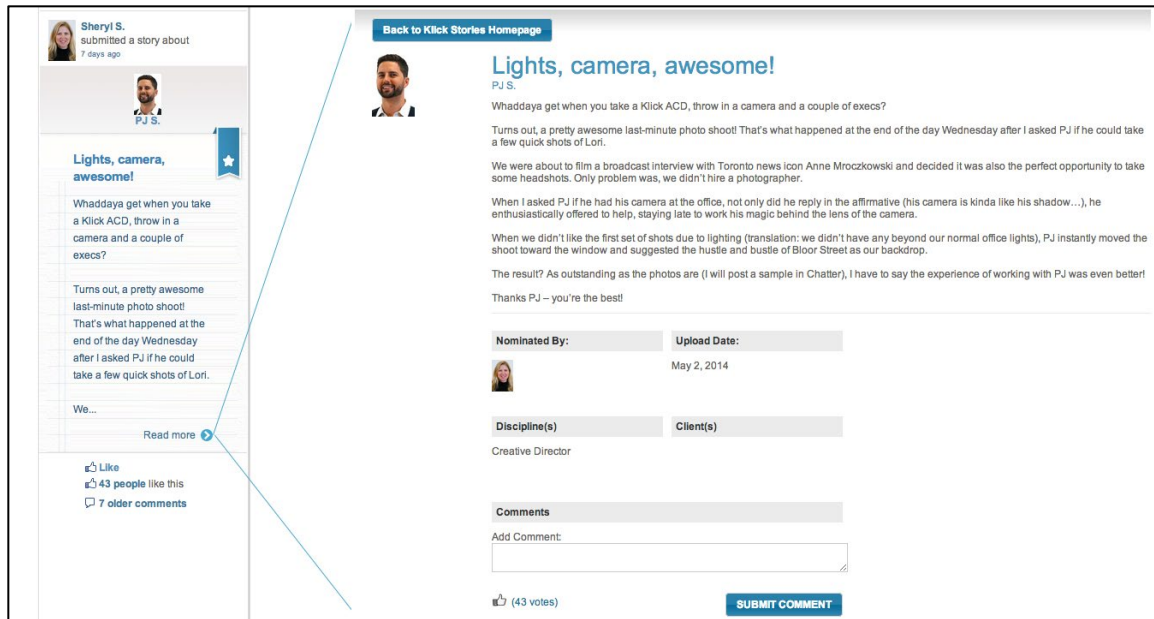
Years later, the team is still seeing new posts with the #dogfood tag, and the ideas generated through this tag have far surpassed what the initial development team could have ever dreamed up when they were planning the tool.

A Virtuous Cycle of Transparency

Klick not only allows ongoing user feedback, but welcomes the challenges that inevitably arise from it too. The manner in which company leaders handled feedback on the initial time-tracking process is a good example.

Not long after *Chatter* was launched, the company's COO posted a message about the importance of accurately tracking billable time. The post, which intended to serve as a reminder to be diligent and accurate, created a heated discussion that produced 44 responses, comments, and rebuttals within the first day of being posted, and many more after that. In these responses, employees cited specific reasons why that level of accuracy could not be met. According to Segal, Genome's leaders welcomed this feedback rather than viewing it as a threat to their power. "A traditional organization might have frowned upon a direct challenge to the COO," he says, "and those publicly criticizing a policy would be flagged as troublemakers who weren't willing to tow the party line." At another organization the conversation might have been hushed into the background, however, Klick's leaders were able to engage with those most adamant about the issue and work out a solution within three days of the original post being made.

Segal and the Genome team refer to this willingness to engage with employees in an open forum as a "virtuous circle of transparency." "It helps to encourage our super-bright and creative employees to share the innovations and approaches they devise with the rest of the company — using the tools," he says. "This rapid and free dispersal of new ideas and ways of working is what sets Klick apart and allows us to iterate and innovate faster and with greater efficiency than our competitors."



Pictured: Klick Health Intranet: *Chatter* Story. In this composite image, the left panel shows a story as seen in the *Chatter* feed, while the right panel shows the same story in full as would be seen when a user clicks on *read more*.

TIMELINE

PROJECT TIMELINE	
Milestone Date	Milestone Description
June 2004	The very first Genome ticket was created, in a beta version of Genome developed by COO Aaron Goldstein and CTO Steve Willer.
November 2006	Full-featured financial platform released
March 2008	The first version of Project 360 is released, a weekly review system that allows team members to provide a “gut feel” about how a project is going.
December 2010	Release of a full-featured travel system (within Genome) that allows employees to book all of their travel arrangements (flights, hotels, etc.), and associate costs, when applicable, with specific clients and projects in the Genome financial system.
December 2010	Klick it Forward program released, rewarding employees for positive performance by providing them with donation credits that can be directed to their choice of charities. Contributions are made directly within Genome and result in monthly donations to a wide range of charities.
October 2011	Vacation management tool added to Genome, allowing employees to book vacations and monitor their vacation balance at any time. This system allows vacation time to be automatically booked into employees’ schedules and shows the person as “on vacation” via Genome’s Employee Locator function.
November 2011	Full redesign featuring an entirely new look and feel, new information architecture, megamenu for easier navigation, and many other system updates.
November 2011	Chatter and Kudos beta release to the first group of users. During November and December, 2011 the beta group was expanded little by little until it encompassed the full Genome user base.
March 2012	Klick Academy, the company’s full-featured knowledge management platform released. It features core video courses designed for different labor roles, elective courses, and <i>Klick Talks</i>, which are short videos from subject matter experts in response to employee questions.

August 2012	• Expense claim system released, allowing employees to submit expenses directly in Genome. This tool handles exchange rate conversion, applies the appropriate taxes to each line item, applies the expense to the appropriate project, and orchestrates the entire submission, approval, and payment workflow.
May 2013	• Customer 360 is released, a tool allowing employees to share customer feedback with the rest of the internal teams. It enables team members to identify and communicate any hot-button issues for each client, and ensures team members are sensitive to a client's individual needs in every interaction with them.
May 2013	• Scheduler 2.0, the company's time tracking platform, was fully redesigned, making the process simpler and easier by including support tools. Integration points are built in to employee calendars, allowing users to drag and drop an entry into the schedule to track time automatically.
November 2013	• Tickets 2.0 is launched, a complete redesign of the <i>Tickets</i> system with a suite of new features. The concept of <i>Tickets</i> was pivotal to the birth of Genome, but as <i>Tickets</i> grew and evolved over the years, some of the original concepts required updates. The highlight of this release was an in-ticket chat feature that allows any user to be "bumped" into a ticket to engage in a real-time chat. Web sockets enable full-duplex, real-time communication between each client and the server, allowing for content to be delivered as needed, without being requested by the client. This means users don't have to refresh their page to see changes when viewing a ticket page. All changes are visible to all clients and are seen in real-time regardless of whether those changes are chat posts from other users, checklist items being added, the ticket description changing, or ticket comments added. The impact was noticed immediately, particularly when users were seeking a quick answer to a question that was potentially holding up work. Having the conversation in the context of the ticket allows for it to be captured within the ticket history and avoids having the ticket re-assigned back and forth.

February 2014	• Weekly Review 2.0 is released. The redesign of <i>Weekly Review</i> incorporated the original aspects of <i>Project 360</i> and <i>Customer 360</i> under a common umbrella, and unveiled a wealth of targeted insights delivered to users while performing each review.
July 2014	• Candidate 360 platform released. The initial release focused on the interview and hiring process and was immediately followed with the full release. It now manages the candidate funnel from screening to decision-making all the way through to hiring.
August 2014	• Work Orders 2.0 redesigned. The core component of the company's financial platform, <i>Work Orders</i>, was fully redesigned to deliver advanced features and targeted insights that assist in the creation of a work order.

Figure 7. Klick Health Project Timeline

CONTENT AND CONTENT CONTRIBUTORS

Traditional forms of top-down or corporate-lead content are rare in Genome. And groups that regularly update this type of content can edit and publish it any time without need for approval. Although the built-in CMS fully supports an approval workflow, it is rarely needed. Within other areas of Genome, nearly everyone is able to manage content freely. Departments have wiki pages that document and define best practices specific to them. Every project has at least one wiki page that outlines the key project information, ranging from the client objective to the IP address of the staging website.

Unlike at other companies, where corporate news feeds may be locked down and controlled by corporate communications departments, any Klick employee with news to share is invited to submit news on Genome, resulting in what Woronowicz refers to as “a pleasant mix” of information, from corporate-level news and events to posts about Euchre Night or the company’s softball game. The intranet’s design encourages social interaction. The interaction itself is cleverly enticed from users by the fact their contributed posts are fed to large LCD screens throughout the office hallways.

News items surface in both the news tool for archival and continued reading purposes and on *Chatter* for conversation, where users can comment on and/or like news items.

Each employee also has a custom profile page, which they are encouraged to populate with answers to such questions as: *What team are you on? What do you do for fun? What countries have you visited? What’s the strangest thing you ever ate? If you could be a superhero, which would you be? If you had to pick, would you prefer to be on American Idol or Dancing with the Stars?* And similar questions, you get the idea. Profile pages may also display a collection of images, like from a corporate event, for example, and employees would be recognized and tagged in them using facial recognition.

Users can contribute intranet content in many ways: posting to *Chatter*, creating *kudos* to recognize and thank colleagues, or by writing a story about accomplishments or general awesomeness among “Klicksters” (Klick Health employees).

Currently not working on any tickets.

O:0 F:4 V:0 S:0

Team Tickets

Add Ticket

ACADEMY

KLICK

CLIENTS

PRODUCTION

TOOLS

SCHEDULER

Chelsea's Tickets

Details

Projects

Chelsea Lefaire—Marketing Intern

Labor role: Other

Reports to: Geoff Wyatt x2490

Work Team: Klick Marketing (Peter F)

Direct Reports:

clefaire@klick.com

x2201

Start date: Jul 4, 2011

3rd Floor

Map last refreshed:14:46:16

About Chelsea edit

What team are you currently on? Who do you work with?

I'm in the Marketing group with Peter, Geoff, Franklyn, Ming, Sheryl, Colin and Neil.

What do you do for fun/ how do you spend your free time?

I dance and teach Lindy Hop and other vernacular jazz dances (dances from the 1920's to the 1940's)

What's your favourite colour?

I <3 #800080

Are you a gamer? If so, which game have you mastered?

Not much of a gamer, but I have mastered Katamari Damacy!

What is the strangest thing you ever ate?

Termites.... or zebra... It's a lie.

What countries have you visited?

US, England, Scotland, Italy, Switzerland (but only for a day), Costa Rica, Spain, South Africa, Sweden, Estonia and Finland (again, only for a day), Russia, Ireland, Belize

What languages do you speak?

English and (Canadian) French. I've also studied a bit of German, Italian, Spanish and Swedish.

Event Photos

(view all)

1 like

2 comments

Tags

Other ways to connect with Chelsea...

chelsea@gmail.com (Public)

KlickHiring (Public)

ca.linkedin.com/in/chelsealefaire/ (Public)

http://www.facebook.com/chelsea (Public)

What Genome says about Chelsea...

Client Bookings (90 Days)

Klick Inc.

Blue Chatter Stats:

Posts by Chelsea: 151

Posts about Chelsea: 25

Kudos Sent: 37

Kudos Received: 12

Peer Recognition:

Set-up For Success— Chelsea has been an awesome resource during my first few days at Klick. I wanted to give a shout out to her because she is always friendly and approachable... (more)

Set-up For Success— Creating and implementing Klick Applause!

Before Klick... edit

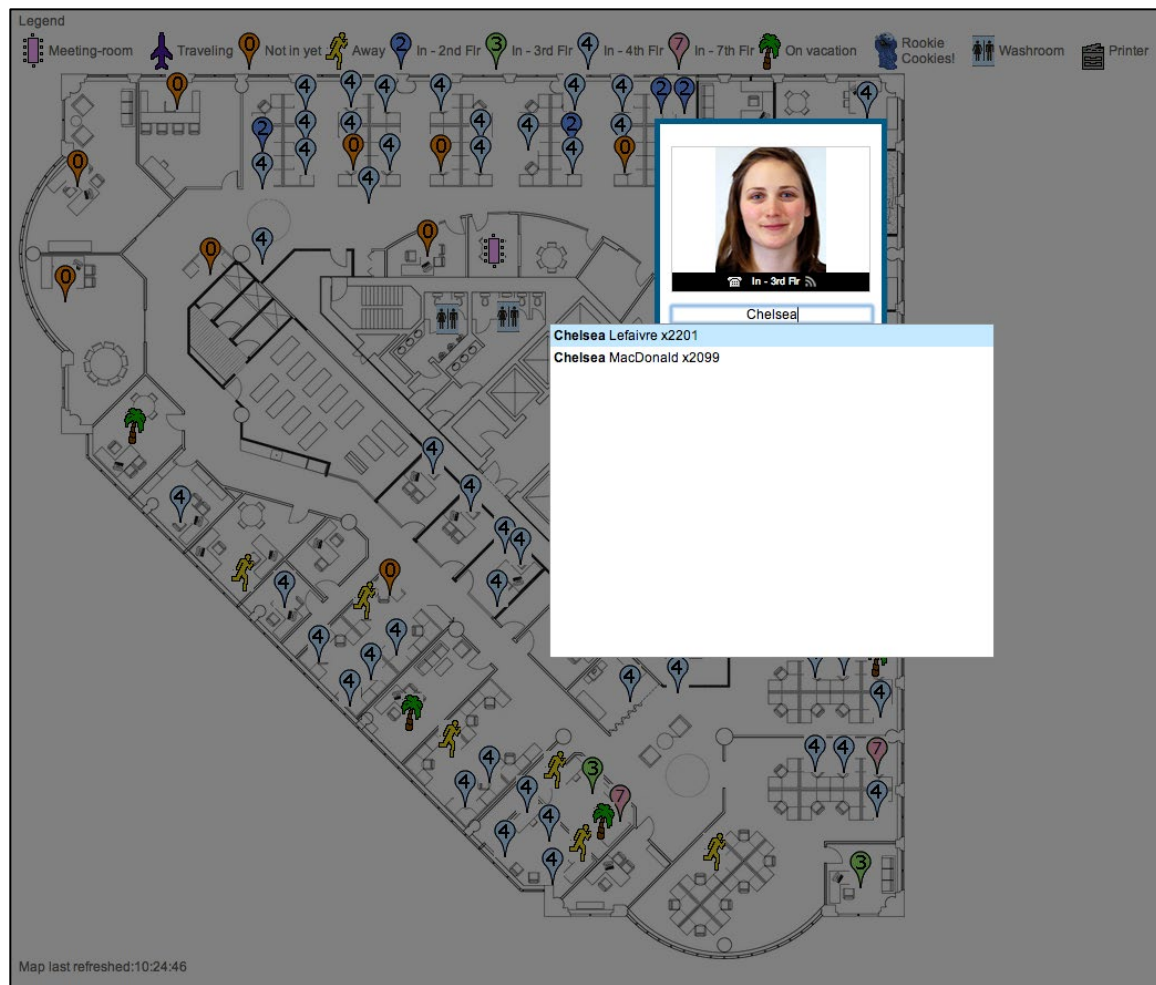
Before Klick I did an undergrad in biochem, worked in emergency risk management consulting and small-pharma and did a master's in business where I interned at a biotech start-up, helping to commercialize their first product

Pictured: Klick Health Intranet: Employee Profile. An employee profile shows where the employee is located on the seating map, information about the employee, photos of them from events, social links, Genome stats, and a bit about their history before they joined Klick. The contact info has a link to a direct-dial feature.

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Pictured: Klick Health Intranet: Employee Seating Map. When users press *Option+Spacebar* to search a particular location on the seating map locator, a light box pop-up shows additional information about the given employee.

TECHNOLOGY

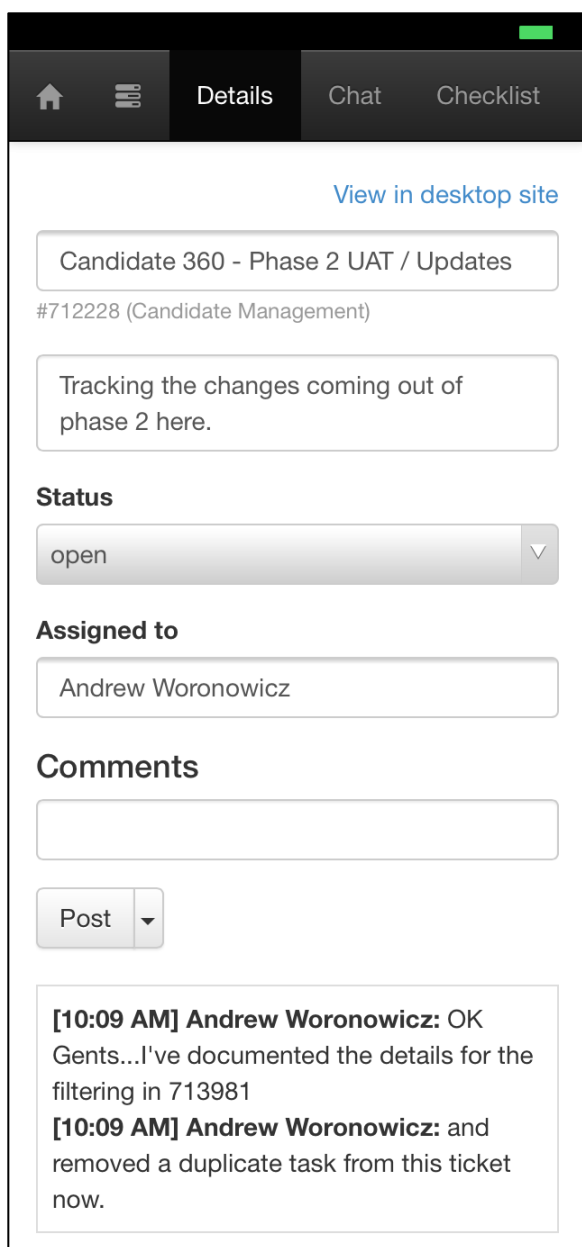
TECHNOLOGY	
Category	Technology Used
Web Server Hardware and OS	• Dell servers, Windows Server 2008
Bug Tracking/Quality Assurance	• Genome (custom)
Design Tools	• Photoshop
Site Building Tools	• Miscellaneous text editors and Visual Studio
Content Management Tools	• Genome (custom)
Search	• Lucene, SQL Server Full-Text Indexing
Web Sockets	• ASP.NET SignalR library
Web Services	• ServiceStack
Cron Management	• Custom engine
Notifications	• Custom engine
Data Warehouse	• Custom Cube Browser

Figure 8. Klick Health Intranet Technology

MOBILE

The team built the mobile version of Genome from the ground up, and started by asking a cross-section of company employees which tasks should be achievable through mobile use and, conversely, which tasks they would rather do while in the office. “While we waited for those answers,” says Segal, “the Genome team was debating the pros and cons of a native app versus a set of simple, mobile-specific web pages versus a fully-responsive design.”

The responses they received matched where their intuition was pointing them, confirming that the greatest bang for their development dollars would be to support a limited set of task scenarios that would get the heaviest usage. So the Genome team opted for a small set of very targeted, mobile-specific web pages.



The screenshot shows a mobile application interface for a ticket details page. At the top is a dark navigation bar with icons for home, menu, and tabs labeled 'Details', 'Chat', and 'Checklist'. Below the navigation bar is a link to 'View in desktop site'. The main content area has a title 'Candidate 360 - Phase 2 UAT / Updates' and a subtitle '#712228 (Candidate Management)'. A text box contains the message 'Tracking the changes coming out of phase 2 here.' Below this is a 'Status' section with a dropdown menu currently set to 'open'. The 'Assigned to' section shows 'Andrew Woronowicz'. The 'Comments' section features a text input field, a 'Post' button with a dropdown arrow, and a list of two comments. The first comment is from Andrew Woronowicz at 10:09 AM, stating 'OK Gents...I've documented the details for the filtering in 713981'. The second comment is also from Andrew Woronowicz at 10:09 AM, stating 'and removed a duplicate task from this ticket now.'

View in desktop site

Candidate 360 - Phase 2 UAT / Updates

#712228 (Candidate Management)

Tracking the changes coming out of phase 2 here.

Status

open

Assigned to

Andrew Woronowicz

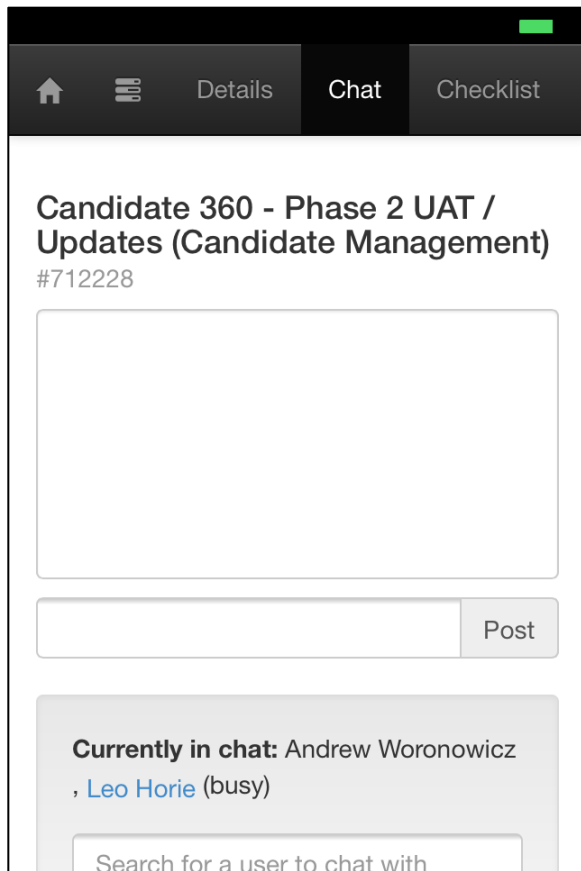
Comments

Post

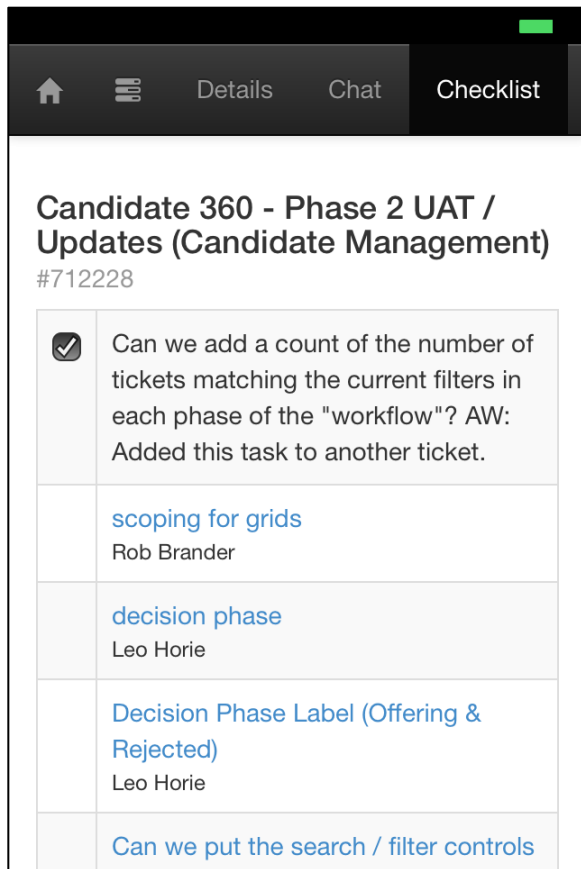
[10:09 AM] Andrew Woronowicz: OK Gents...I've documented the details for the filtering in 713981

[10:09 AM] Andrew Woronowicz: and removed a duplicate task from this ticket now.

Pictured: Klick Health Intranet: Mobile Ticket Details Tab. The *Details* tab of a ticket, as seen on the mobile Genome app for the Klick intranet.



Pictured: Klick Health Intranet: Mobile Ticket Chat Tab. The *Chat* tab of a ticket, as seen on the mobile Genome app for the Klick intranet.



Pictured: Klick Health Intranet: Mobile Ticket Checklist Tab. The *Checklist* tab of a ticket, as seen on the mobile Genome app for the Klick intranet.

Prioritizing Tasks for Mobile Users

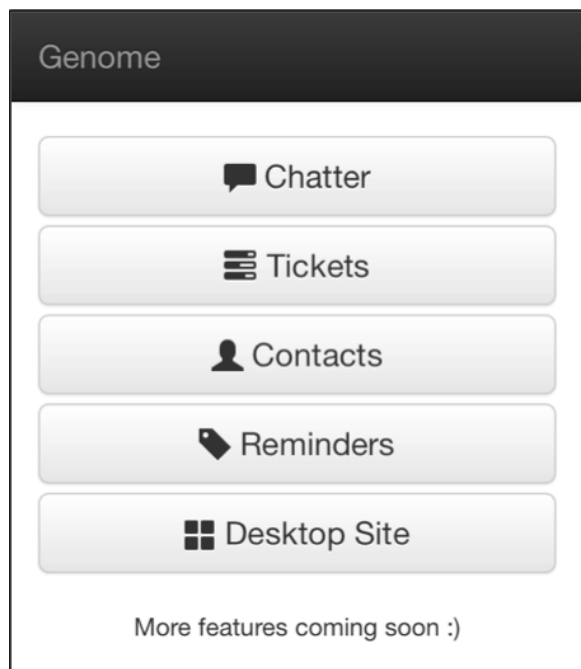
The design team had two objectives for the first round of mobile Genome development: the mobile version should only cater to a specific sub-set of intranet tasks, and those tasks should allow mobile users to move work forward and connect with team members while away from their desks.

The first mobile tool the team created was a quick-and-easy ticket interface. The tool allowed users to browse their own tickets (ordered by priority) browse the tickets of other users or projects, and open a ticket to perform basic actions, such as comment, re-assign, and change ticket status.

The team also included a company directory tool allowing Klicksters the ability to look up any fellow employee, see their picture, job title, contact information, and even their last-known work location. The app shows a list of selected employees and their status. For example, "on the 7th floor" or "not in yet." Clicking on a person brings up a baseball-card-like info sheet with the person's picture, contact info, and the location they were last known to be at work. This search-on-the-go app saves Klicksters time when they're trying to find their colleagues in the office.

The design team also created a mobile version of *Chatter* in an effort to inspire a broader feeling of connectedness, even while out of the office. The mobile tool allows employees who are traveling to stay connected with the internal stream of consciousness of the organization, but it also allows them to inject their experiences back into the office.

The connection the tool provides contributes to an important sense of belonging and support for travelling staff members. "It's hard to quantify the feeling of camaraderie that is felt when a picture is posted — via mobile *Chatter* — of our team members who are traveling and about to pitch to a new client, and the entire office chimes in with their support," says Woronowicz.



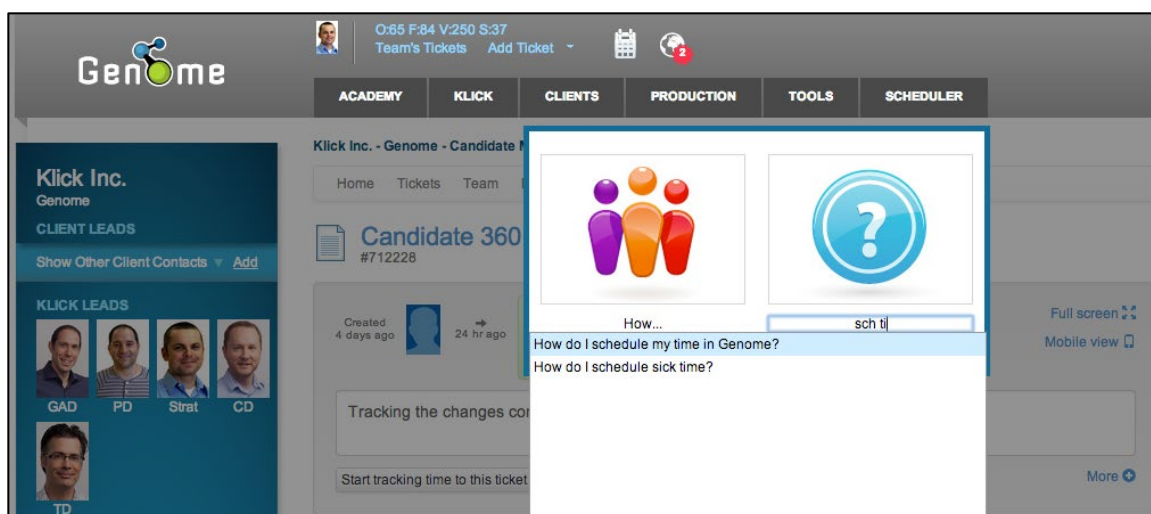
Pictured: Klick Health Intranet: Mobile App Home Screen. The mobile Genome app home screen, as seen on an iPhone, is a simple list of tool and link options for the targeted types of tasks.

SEARCH

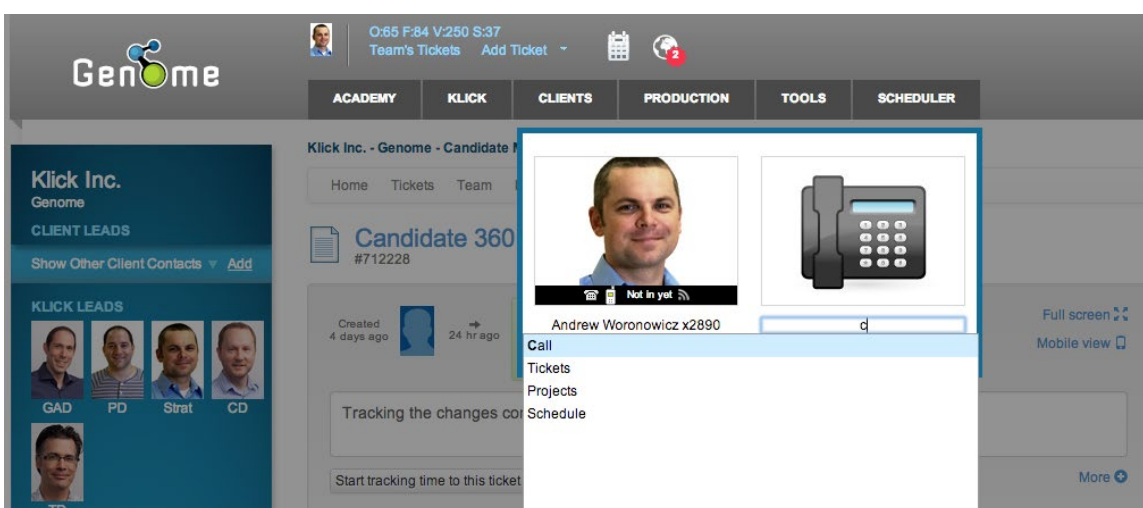
Genome differs from a typical corporate intranet in that it has very few pure content pages. The vast majority of the site is focused on data that is grouped and organized in various ways. The intranet does have a traditional search tool, but the primary search tool is a faceted, exploratory one called *Finder*. Any user can simply hit *ctrl+space* or *cmd+space* from any page in Genome to open a modal window. From that modal window, employees can search for just about anything, including a fellow employee's name, a project name, a client, a Genome tool, a content page or whatever else he might think of. Then, the user can either navigate to that page or tool, or press *tab* to continue to search through different attributes of that item. The way this tool works is best illustrated through an example. The team shared this scenario as an illustration:

"A technical architect wants to check on what one of his team members is working on right now. Rather than disturb that person, he can simply type: *ctrl+space* → "smi" (which automatically finds the only matching pattern, John Smith) → *tab* → "schedule" → *enter*. The technical architect is immediately taken to John's schedule to see what John is actively booking his time to right now. The exact same scenario applies if a user wants to see John's ticket list, project list, location on the company seating map, and so much more. The technical architect can also search for "John" → *tab* → "call" and have his phone automatically call John's phone, and, if John doesn't answer, leave a message that will automatically pop up the next time he calls John to remind him of what he wanted to ask him."

The same faceted search applies to other components of Genome, such as projects (project budgets, project work orders, *Project 360* reviews, project tickets, etc.). It can even be used for searches like "who," "what," "where," "when" and "why," along with a search phrase. This triggers the return of relevant *Klick Academy* items. "You can imagine how pleasant the experience can be when an employee wants to create a ticket or fill out her schedule for the first time," says Woronowicz, "and all they have to do is type "how" → *tab* → "schedule" to get instant access to a 90-second video outlining the process."



Pictured: Klick Health Intranet: Faceted Search. The search feature in Genome allows users to search using terms like “who,” “what,” “where,” “when” and “why” along with a search phrase. A sample search such as: “how” → *tab* → “schedule” will access a 90-second video outlining how to schedule time through.



Pictured: Klick Health Intranet: Intra-Office Calling. A productive feature of the Klick intranet is intra-office calling. After searching for a colleague, a person can type “call” (or simply “C” then hit *Enter*) to initiate a call. This feature also allows access to that co-worker’s tickets, projects, and schedule.

RESULTS AND ROI

Even a data-driven organization, such as Klick, can struggle to define and measure the success of an intranet. “We use many different metrics, including specific ROI calculations comparing the time invested on a new feature against the time saved within the first quarter or year after release,” says Woronowicz. “For example, *Project 360* experienced an 83% weekly usage rate three months after we launched

the weekly review feature, reaffirming that employees were finding utility and value in it. However, one of our favorite measures of success is basic usage, specifically as it relates to new features that our employees are by no means required to use to be successful.”

In November of 2011, for example, when the company launched its internal social network, *Chatter*, it maintained both high expectations and also a willingness to accept the tool might be a complete and total failure. “Our employees are extremely busy,” says Segal, “and without a tangible benefit, they would have no reason to engage with it. But they did — and how!”

The results speak for themselves in terms of engagement. In the first year, *Chatter* posts, news stories, kudos, comments and so on surpassed all aggregate social interaction expectations, averaging one new interaction every 76 seconds of the work day. But that would prove to be just the start of great things to come. In the 12 months prior to this writing, the platform generated 151,109 social interactions, including *Chatter* posts, employee kudos posted, and comments or likes on those posts.

“If that number doesn’t sound incredible to you, keep in mind that our organization only averaged about 400 employees during this timeframe,” says Segal.

Another good example of user engagement exceeding expectations happened in November 2013, when the company launched its updated ticketing system with a new in-ticket chat feature. The idea behind the feature was to allow employees to quickly collaborate in real time to resolve issues quickly, answer questions, and move forward with their day — as opposed to assigning the ticket back and forth to have the same discussion, or worse yet, to schedule a face-to-face meeting to resolve the issue. This time-consuming, asynchronous communication (inherent in many ticket-tracking systems) is inefficient as participants post comments and then re-assign the ticket — lather, rinse, and repeat. Being the data-centric organization Klick is, the Genome team analyzed the time saved if they short-circuited the back-and-forth of re-assigning tickets and emphasized synchronous collaboration instead. Woronowicz gave us the numbers:

“Assuming the bare minimum of two ticket assignments (one to ask a set of questions and one to post the full and complete answers) and assuming that a busy employee would only look up from their current task to check their ticket list once per hour, each of those 1,845 conversations each month would have required 3,690 hours of calendar time before the resolution was achieved. This amounts to 462.25 business days, or 1.8 calendar years (based on 250 business days per year) in delays. That’s 1.8 calendar years of elapsed time saved per month.”

Given this calculation, even if only a small fraction of those conversations had followed this enhanced path, the savings would still amount to a resounding success. And it has been a resounding success.

Despite the fact that there was no external incentive for using the tool, aside from the benefits that the tool itself provides, it has already exceeded expectations and continues to grow. In the nine months since that tool launched, 337 of the company’s approximately 400 users have engaged in ticket chats. Woronowicz, again:

“More astoundingly, there have been a total of 16,609 conversations consisting of 58,723 individual comments. That represents approximately 1,845 conversations per month, assuming at least two people, each of whom would have had to otherwise conduct conversations via other means.”

In addition to these amazing examples of user engagement, the team also shared some key stats the Genome platform has racked up since launch. They include:

- Over 4 million unique pages
- Over 716,963 tickets (tasks)
- Over 17,633 projects
- Over 6,500 Kudos (peer recognition posts)
- Over 50 unique tools

LESSONS LEARNED

The Genome team has a long history evolving its platform over many years. From minor enhancements to full-scale redesigns and major feature releases, the team has gained a lot of wisdom through experience. Several key lessons have etched their place in the collective memory of the organization because they prove true, time and time again. Woronowicz explains these lessons:

- **Involve the end users.** “This runs much deeper than just including them in requirements sessions and contextual inquiries at their workstations, although those steps are critical as well. We have found that the more we involve users in the full lifecycle of a phase of development, the higher our success rate is. The reasons are very intuitive. Having end users involved in the up-front requirements ensures the end result matches the original need. Having end users participate in wireframe reviews and beta testing ensures that we continue to work off of a consistent vision and openly discuss where changes are needed with the entire group. Having end users participate in the rollout process and actually train their peers on the new tools builds a community of advocates who are proud of the finished product and well-versed in the intricacies of the solution, allowing them to become subject matter experts for their peers.”
- **Iterative development cycles result in better products.** “Where possible, we modularize updates into smaller components that can be built and deployed independently. Even when the full functional benefit cannot be achieved without subsequent releases, we still strive to share partially functional builds and begin getting feedback early in the process. This gives us a much longer runway to course-correct and inevitably, at each release point, users are inspired with new ideas and entirely new directions we would not have thought of at the outset of the project. The end results are more thorough, feature-rich modules that match what our end users really want.”

- **Fail fast.** “We call this process ‘digital Darwinism’ and it applies to any ongoing initiative, as well as any existing feature of Genome. If a feature is not getting used, we scrap it. If we are partway through a build and realize the cost/benefit doesn’t make sense, we abandon it. This, admittedly, is harder than it sounds, particularly as teams become invested in their work. However, once you follow that cycle a few times and the team can clearly see that the next initiative we worked on was a clear success, abandoning a project at risk of underperforming becomes the obvious choice.”
- **Actively seek out and trust data.** “Collecting and analyzing data is completely second nature to us. Every new tool is designed and built to not only serve the current business need, but also to collect data so that in the future we can easily measure the effectiveness of the tool and many others. A perfect example of this is our new hiring platform *Candidate 360*. *Candidate 360* creates a structured and guided applicant-management process and connects end-to-end from the first time we know about a potential candidate right up until they are hired. The data we are collecting about the specific attributes we expect candidates to have, how they score against those attributes, and the success our employees have interviewing them will tell an incredible story in the future when we can couple the data with employees who have been hired through this process. It will give us the intelligence to recognize which of our employees conducting interviews are great judges of talent, and which of our decision criteria turned out to be more or less important when identifying the ideal candidate versus a hire who didn’t work out in the long run. Anticipating what data will be needed to make more informed decisions in the future, and ensuring the data is available to everyone at the right time, has been one of our most critical success factors to date.”

Saudi Food & Drug Authority (2015)

Using the intranet:

The Saudi Food & Drug Authority (SFDA) was established under the Council of Ministers as an independent corporate body that reports to the president of the Council of Ministers. The objective of the Authority is to ensure the safety of food and drugs available for both man and animal, and to ensure the safety of biological and chemical substance, and electronic products.

Headquarters: Riyadh, Saudi Arabia

Number of employees the intranet supports: 2,000

Company locations: Riyadh, Jeddah, Dammam and other 30 office branches across Kingdom of Saudi Arabia.

Management and team members: Falah AL-Mutairi, Executive Assistant President of IT (project sponsor); Faisal Alturaif, Executive Director of E-Service; Bander Al-Johani, Portals Manager; Abdulaziz AlFakhrei, Head of Smart Systems; Mohammed AlMutairi, Intranet Project Manager; Fahad Alquait, Web Developer & Web Designer; Fahad Alanezi, Web Developer; Abdulaziz Alsughyyer, Systems Specialist

Implementation partner: Sure International Technology

SUMMARY

Understanding the true work that employees do and giving them the freedom and tools to do it is the backbone of the Saudi Food & Drug Authority's intranet. The designers of "Bawabaty" (بوابتي) which means "my portal" in Arabic, made the intranet highly customizable. The team considered the needs of the 2,000 people in 32 different branches that the intranet supports. These users — including administrators, content authors who have permissions to write only, content authors who can write as well as approve content, and end users — have varied requests and desires. Thus, designers made 70% of the homepage customizable via widgets. In this area, employees may move, add, or remove widgets as they desire.

Moving widgets is simple by clicking the move (cross) icon in the upper left corner of the widget, then just dragging and dropping it to the position in which they want it to appear. The icon looks like the oft-used move symbol, which makes it easy to decipher. As a widget is dragged, a transparent version of it is displayed to make the action obvious. Once dropped, the widget falls into its new position, and the widget that held the position automatically moves out of the way and down to the next slot on the page.

Common barriers to customizing pages on intranets include:

- Discovering it's not possible to customize
- Not finding the method to customize
- A complex UI that's hard to use and gives little feedback when trying

But none of these issues are present on Bawabaty. On the contrary, this interface makes it easy for employees to test and investigate layout options for the homepage that best suit their needs.



Pictured: SFDA Intranet: Homepage. The Saudi Food & Drug Authority's intranet makes it simple to move sections (called "widgets") around on the homepage. A widget is moved by doing a click-hold-drag action on the move icon (the blue plus sign), found in the left of a widget title bar.



Pictured: SFDA Intranet: Widget Move Feedback Display. When dragging a widget on the SFDA intranet, the user sees a transparent version of the widget. This is great feedback and makes the user feel in control.



Pictured: SFDA Intranet: New Widget Positioning. After the widget is dropped, it snaps into position, and the widget that was in the space before automatically moves down a spot.

To remove a widget, users click the X icon in the upper left of the widget. Employees are asked to confirm widget removal, which is a nice safety feature to help prevent errors.



Pictured: SFDA Intranet: Confirm Widget Removal. As a safety net, users are asked to confirm their action when removing a widget.

People may add widgets easily via the yellow icon in the far upper left corner of the homepage. Clicking it opens categories of widgets the users may select from.



Pictured: SFDA Intranet: Adding Widgets to Homepage. Employees may add widgets on the homepage of the SFDA intranet by using the icon in the far upper left.

Besides the “non-fixed widgets” that employees may choose to use, designers created “fixed widgets” as well. These comprise the most important content that everyone needs, like news, announcements, and all internal services. The page is arranged in sections with borders and backgrounds so users may easily scan for the information they are looking for.



Pictured: SFDA Intranet: Fixed Widgets. The sections (widgets) in the top part of the homepage are not moveable, evident by their lack of the move icon.

Widgets provide a range of functionality that is helpful in doing day-to-day work, such as the *e-library*, the English-Arabic (bidirectional) language translator, and date conversion.

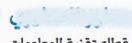
The *e-library* widgets provide quick access to shared folders and a document library for all departments and groups. Access to the *e-library* is controlled by the permissions given for each group, and each shared folder has an administrative user from the appropriate department or group.



Pictured: SFDA Intranet: e-library Widgets. The e-library on the SFDA intranet houses shared folders and a document library.

Widgets that are less work related are also available, such as *Special Offers*. Employees may sort the offers using filters on the right.

الساعة 1:21 AM | الجمعة 20 يونيو 2014 م - 22 شعبان 1435 هـ | الرياض - الفجر 3:33 ص | 33 درجة

مرحباً  قطاع تقنية المعلومات

البابتي

الرئيسية خدماتي المكتبة الإلكترونية البحث في البوابة البحث ...

الهئية العامة للغذاء والدواء > المركز الإعلامي > عروض خاصة لموظف الهئية

الخطوط القطرية للصيران

1435/08/20 هـ
يسر الإدارة التنفيذية للعلاقات العامة والإعلام الاعلان عن توقيع اتفاقية مع الخطوط الجوية القطرية لمنح جميع منسوبي الهئية (وذوهم) خصومات كما يلي: ... التفاصيل

عرض مقدم من مريديان الهدا-الطائف

عرض مقدم من مريديان الهدا ... التفاصيل

مجموعة الحكير

عرض مقدم من مجموعة الحكير

عرض مقدم من مجموعة الحكير ... التفاصيل

عرض مقدم من مجموعة المهيدب

عرض مقدم من فندق ماريوت كورت يارد الرياض ... التفاصيل

عرض مقدم من فندق ماريوت كورت يارد الرياض ... التفاصيل

القائمة الرئيسية

- الأخبار
- التعاميم
- الفعاليات والأنشطة
- الملف الصحفي
- النشرة البريدية
- عروض خاصة لموظف الهئية

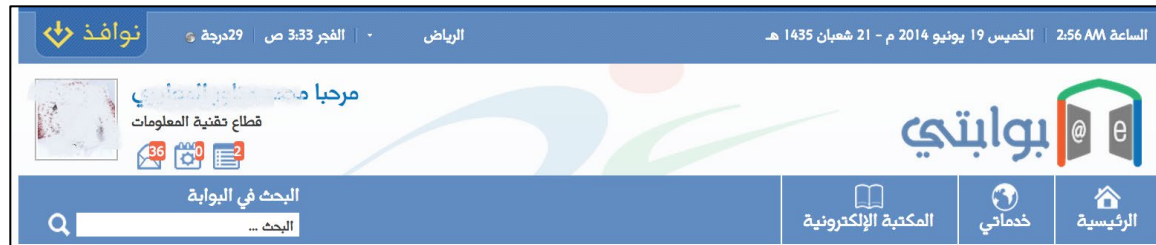
أصناف العروض الخاصة

- عروض عامة
- قسم السفر (فنادق ومنتجعات)
- مطاعم وحلويات
- تسوق
- عناية شخصية
- بنوك وتمويل
- اخرى

Pictured: SFDA Intranet: Special Offers Widget. Employees may sort offers in the *Special Offers* widget by using filters on the right.

Other non-work related tools on Bawabaty are weather and prayer time. These appear as shortcuts in the upper left of pages, in the topmost blue bar. In this same area, users may also change their location to display information related to that location.

Designers made it easy to get started when browsing using the menus by offering only three top-level navigation choices: *Home*, *My Services*, and *e-Library*. These appear in the right-most part of the blue horizontal bar second from top of page. The site's search is in the far left of the same blue bar.



Pictured: SFDA Intranet: Global Navigation. Top-level navigation on the SFDA intranet is limited to three choices. Search is also readily available and users may change locations.

Bawabaty keeps employees updated in a number of ways. For example, users may see news items in the news list, and filter those items.

The *Notifications Center*, located under the employee's name above the search box, consists of three icons — emails, calendar, and notebook — that correspond with various tasks and messages for that user. It is integrated with other internal systems, like Microsoft Exchange Server, so employees can be informed about any pending emails, meetings, and tasks that are due. The icons appear with red badges showing the numbers of items pending, and when a given icon is clicked, it displays a drop-down list of the latest five items, respectively.



Pictured: SFDA Intranet: Notifications Center Emails. Hovering over the first icon, the envelope, in the *Notification Center* displays a list of the most recent unread emails, including the sender and subject.

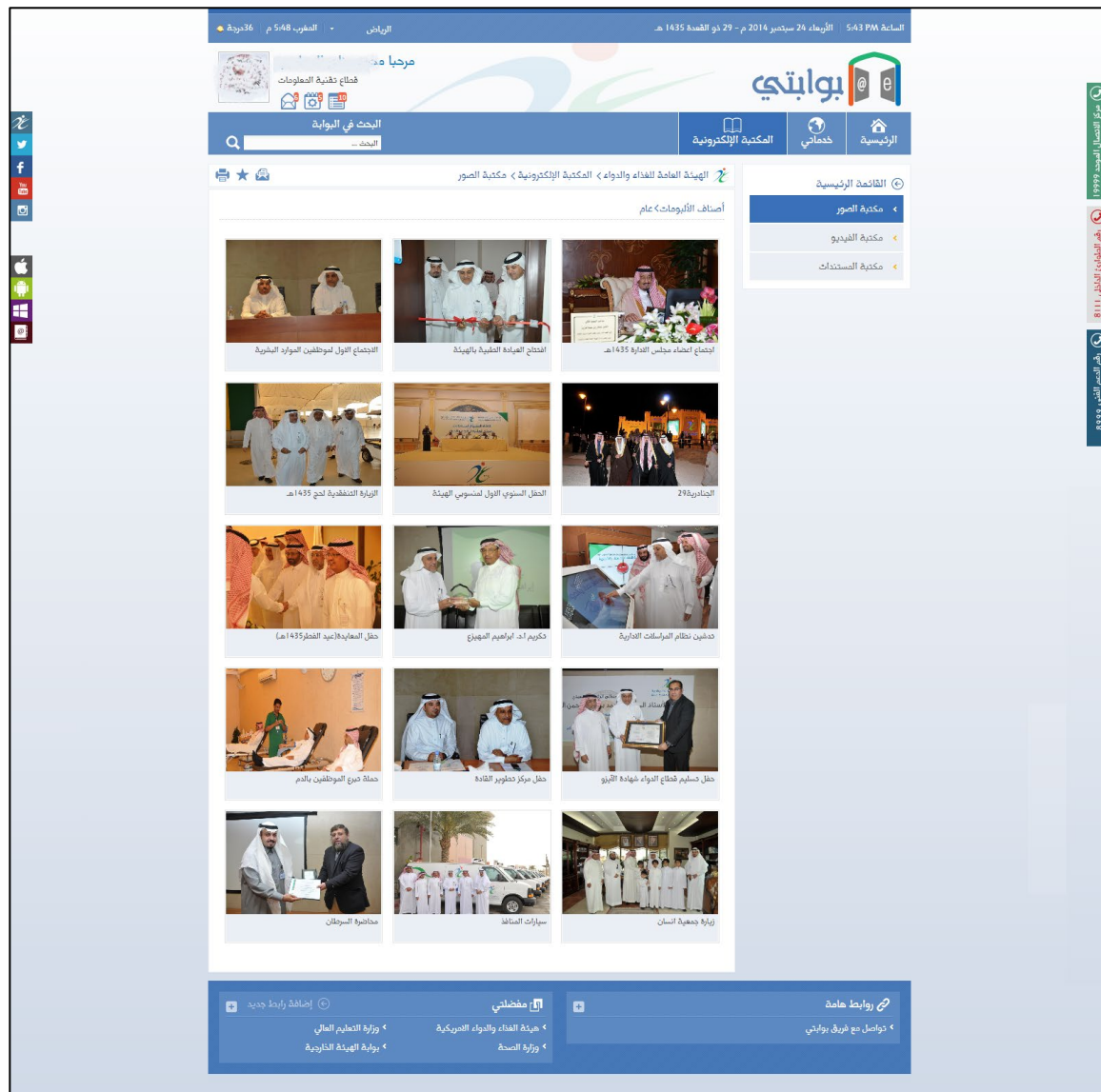


Pictured: SFDA Intranet: Notifications Center Calendar. Hovering over the second icon, the calendar, in the *Notification Center* displays a list of upcoming meetings including the subject and time.



Pictured: SFDA Intranet: Notifications Center Notebook. Hovering over the third icon, the notebook, in the *Notification Center* displays a list of tasks to do.

The *Photo Gallery* is a visual way to stay abreast of happenings at the organization.



Pictured: SFDA Intranet: Photo Gallery. Photos of events posted on the SFDA intranet help people stay abreast of happenings at the organization.

Employees may also learn about one another through their profile pages, which collate and display the latest information from various systems (e.g., Human Resources). Employees may search for each other via the *Employee Directory* widget by various criteria, such as first name, last name, phone number, or email address — and they can do so in either Arabic or English.



Pictured: SFDA Intranet: Employee Directory Widget. The *Employee Directory* widget on the SFDA intranet helps people find one another.



Pictured: SFDA Intranet: Employee Profile. The *Employee Profile* page on the SFDA intranet combines the most current information from various sources.

To locate other information, users may search Bawabaty via the search field in the far left of the global navigation bar. The results page displays a clear title for each result, a short description, a URL, and icons to designate document types. Users can

preview a document in the list of results by hovering over it — no click interaction is needed. This helps users feel in control and avoid errors by not clicking open unwanted documents.

On the left of the search results page are filters that employees can use to display results by document type. They may also use the date slider to choose a date range to exclude results.



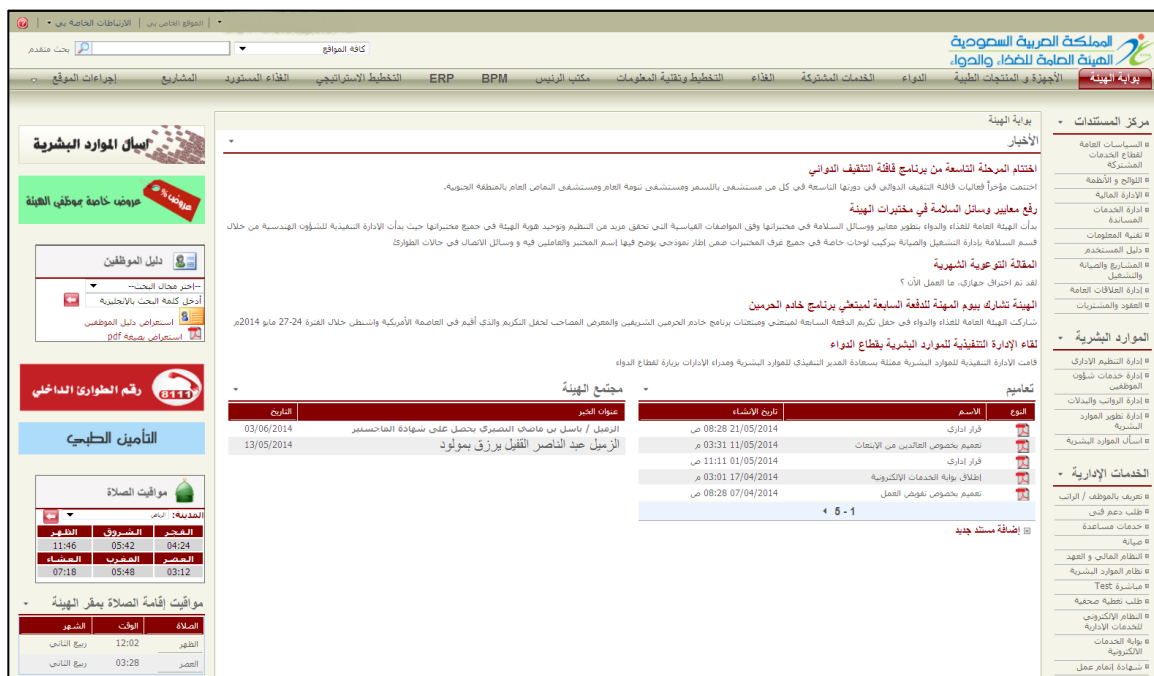
Pictured: SFDA Intranet: Search Results. Search results on the SFDA intranet display a title, description, link and icons. Filters on the left allow users to refine the results.

In the beginning, the design team held many brainstorming sessions to identify the primary goals for the new intranet. The team also sent a survey to all employees to solicit their feedback about the current intranet and what improvements they needed to help them complete daily tasks more easily.

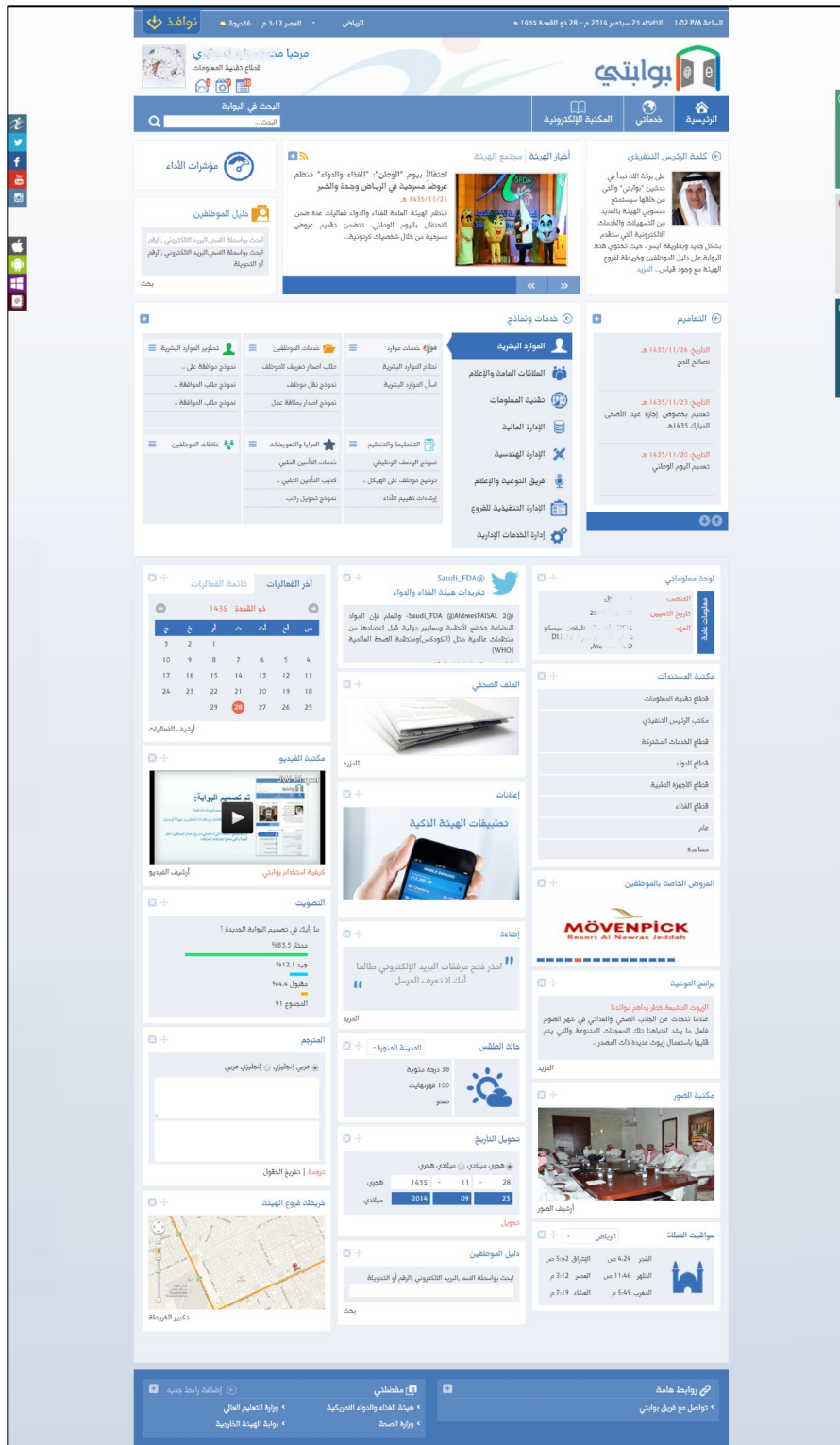
The team also conducted a gap analysis on the current intranet to find the weak points and analyze the existing content. Once all this information was synthesized, three main goals for the project and the new intranet were identified:

- Assist employees in performing their daily tasks easily.
- Provide community tools to enhance communication between employees
- Simplify access to corporate information

With the help of top management, the design team achieved these goals, despite a difficult development process and a lot of challenges with content development and integration with legacy systems.



Pictured: SFDA Intranet: Old Homepage. The old SFDA intranet homepage as it looked before the redesign.



Pictured: SFDA Intranet: New Homepage. With the redesigned intranet all widgets and content are accessible from the intranet homepage via one click.



Pictured: SFDA Intranet: My Services Megamenu. The My Services megamenu on the SFDA intranet provides quick access to all the information in the My Services content area.



Pictured: SFDA Intranet: My Services Homepage. The My Services homepage provides access to all services links, forms, guidelines, and documents that are published for employee reference, all in one area of the site and categorized according functional area.

INTRANET TEAM

الهيئة العامة للغذاء والدواء
Saudi Food & Drug Authority



Management



Falah Almutairi
Executive Assistant President of IT
(Project Sponsor)



Faisal AlTuraif
Executive Director
of E-Services



Bander Al-Johani
Portals manager

Project Team



Mohammed AlMutairi
Project Manager



Abdulaziz M. Al Fakhri
Head of Smart Systems



Fahad Alquait
Web developer
Web designer



Fahad Alanezi
Web developer



Abdulaziz Alsughyer
Systems specialist

SFDA project team members and management (top row, left to right): Falah AL-Mutairi, Faisal Alturaif, Bander Al-Johani, (bottom row, left to right) Mohammed AlMutairi, Abdulaziz Al-Fakhri, Fahad Alquait, Fahad Alanezi, and Abdulaziz Alsughyer.

GOVERNANCE

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Intranet Section Team	• Manage the redesign project • Manage the design and development activities, and infrastructure • Coordinate communication between other intranet teams within SFDA, including: ◦ Public Relations department ◦ Content owners from various departments • Train and support content owners
Public Relations Department	• Serve as intranet portal owner • Manage intranet content • Coordinate with other departments regarding their content
Content Owners	• Each is responsible for updating and maintaining the consistency of their assigned section • Delegate some part of the updates or changes to other team members or departments, as necessary

Figure 9. SFDA Intranet Team Responsibilities

USERS

The intranet is integrated with Active Directory. Since every employee exists in Active Directory, every user can access Bawabaty according to his group and department permissions. Each group and department has private content, which is kept from those outside the group. The publishing team can target content for specific groups.

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	• http://bawabaty • The same URL is used for both desktop and mobile devices since the intranet uses a responsive design.
Default Status	• Users choose whether or not to bookmark the site. It is not required as a user's homepage.
Remote Access	• Users can access Bawabaty remotely via VPN.

Figure 10. SFDA URL and Access Information

DESIGN PROCESS AND USABILITY WORK

Design Approach

When the SFDA management team decided to create a real intranet portal to replace the old intranet, they assigned a project team and gave them their full support. They also defined the project goals as follows:

- Help employees do their work and improve productivity
- Help employees find content quickly and easily and improve usability
- Ensure information is accurate and up-to-date
- Provide efficient access to content and tools
- Create a consistent user experience
- Create a consistent look and feel
- Align intranet content with business workflows
- Facilitate collaboration across groups and departments
- Empower content providers to manage their own information
- Follow intranet standards
- Create better categorization
- Promote best practices across the site(s)
- Eliminate wasted clicks
- Create tools that are easier to learn and use
- Enhance knowledge sharing

The key to achieving this comprehensive list of goals was to do a lot of research and find ways to gather feedback from users. To that end, the following activities were conducted:

- **Surveys:** The team designed a questionnaire to query employees about their needs, experiences, and expectations for the new intranet, as well as their opinion of old site. The survey was sent to all employees and helped the team discover three main things:
 - There was great demand for an updated employee directory.
 - Employees had a strong desire for social features as well as social news.
 - Having an e-library and a documents library is considered essential on an intranet nowadays.
- **User experience best practice study:** Through books, reports, and other resources, the team studied up on contemporary user experience trends and best practice.
- **Brainstorming:** In the early stage of the project, the team held weekly brainstorming sessions with internal teams to generate new ideas and discuss intranet features. Those features were prioritized and then discussed in more detail. Sessions were also conducted during the design phase to assess the implementation of prioritized features.
- **Gap analysis:** The team performed a gap analysis to:
 - Analyze the current state of the intranet, including features, content, and tools used
 - Determine (from brainstorming sessions) a set of desired outcomes
 - Identify gaps that need filled or resolved to get the maximum value into the new intranet
- **Standards and guidelines development:** Through a redesign of the architecture, the team created and documented (as a content manual) a new information hierarchy and content map to help content authors in writing, styling, and classifying the new content.

Management was closely involved in every activity, providing feedback and support to the design team.

TIMELINE

PROJECT MILESTONES	
Milestone Date	Milestone Description
January 2007	Launch of first SFDA intranet
August 2013	Create vision document and requirements analysis, conduct usability studies to inform design of new intranet
October 2013	Project begins
December 2013	Design phase
February 2014	Implementation
March 2014	Deployment
May 2014	Develop content
June 2014	Launch and go live for new intranet

Figure 11. SFDA Project Milestones

CONTENT AND CONTENT CONTRIBUTORS

The site uses the CMS functionality in SharePoint 2013 for content management. They chose this solution because the organization uses many Microsoft technologies and they have many experienced SharePoint developers working in-house.

Content owners (approximately ten) from different departments across the organization provide content, which is then reviewed by the department that owns the intranet: Public Relations.

Initial training for content authors consisted of a three-day training program and content contributors were given a handout containing content best practice guidelines. The design team conducted an additional three-hour training session after launch to field questions from authors and discuss additional best practices. As well, content authors are regularly provided with video tutorials and other tips.

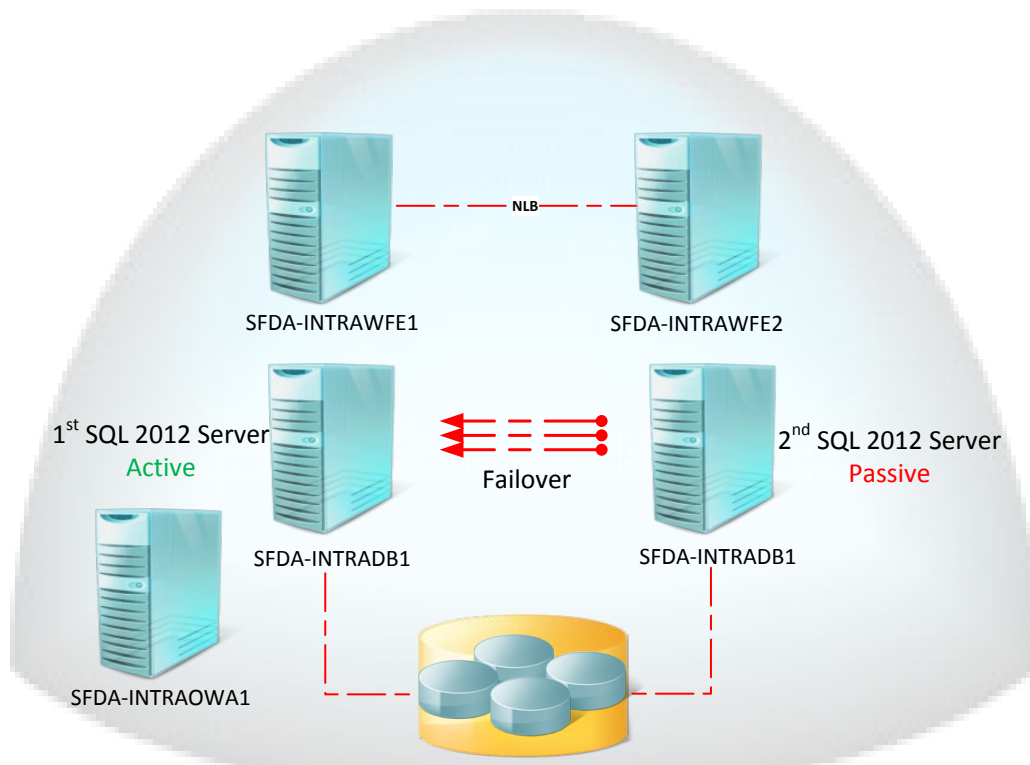


Pictured: SFDA Intranet: Publishing and Approval Tool. The publishing workflow starts when authors add or edit content using the editing tool provided by SharePoint. Authors then send the content to the Public Relations department for approval, which can approve and publish the content, edit the content first then publish it, or reject it and provide feedback and comments for the author to follow up with.

TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and OS	• Five servers (see hardware architecture diagram below) • Windows Server 2012 Standard
Bug Tracking and Quality Assurance	• Team Foundation Server (TFS) quality assurance
Design Tools	• Photoshop • Dreamweaver
Site Building Tools	• Visual Studio 2012 • SQL Server 2012 • SharePoint Designer 2012
Content Management Tools	• SharePoint 2013
Search	• SharePoint 2013 Search (embedded FAST Search)

Figure 12. SFDA Intranet Technology



Pictured: SFDA Intranet: Server Architecture. This diagram shows the hardware architecture design of the SFDA intranet. The site relies on two servers for the web front and indexing services. A SharePoint farm (with NLB) configuration was implemented to provide highly available services. Microsoft SQL 2012 servers are connected to SAN storage and used to host the database. Windows Server 2012 Standard edition (clustering) technology is configured for SQL that provides the services with redundancy and continuity in case of failure.

MOBILE

The SFDA team chose to employ a responsive design to lower their development efforts and administration overhead, and to provide a unified user experience regardless of how users access the site.

The fixed widgets are the only widgets available on mobile devices, since they comprise the most important part of the intranet, and employees don't need non-fixed widgets when out of the office. All other site features (besides non-fixed widgets) are available.

Users can access Bawabaty from their mobile devices, only through VPN.



Pictured: SFDA Intranet: Homepage Phone View. Homepage of the SFDA intranet as seen on a mobile phone.

SEARCH

One of the reasons the team chose SharePoint 2013 as the intranet platform is because of the powerful search engine it provided. "We adapted this out-of-the-box search engine and it has provided the intranet with rich search features such as content categorization and filtering, indexing, a friendly relationship with Microsoft Office web apps, support for Arabic language content, as well as great search results, that can be displayed based on content permissions," says project manager Mohammed AlMutairi.

الساعة 9:27 AM | الثلاثاء 23 سبتمبر 2014 م - 28 ذو القعدة 1435 هـ | الرياض | الظهر 11:46 ص | 32 درجة

مرحباً مدبري
قطاع تقنية المعلومات

البوابة

الرئيسية | خدماتي | المكتبة الإلكترونية

البحث في البوابة

الهيئة العامة للغذاء والدواء > دليل الموظفين

القطاع: قطاع تقنية المعلومات

البحث

الاسم	الوظيفة	البريد الإلكتروني	الهاتف
خالد فهد راشد الناصر	مدير إدارة أجهزة	خالد.ناصر@sfda.gov.sa	5699
خالد محمد عبدالعزيز العسكر	مدير إدارة أجهزة	خالد.عسكر@sfda.gov.sa	2545
رائد عبدالله القعود	رئيس قسم التطبيقات	رائد.قعود@sfda.gov.sa	2530
رائد عبدالله القعود	مدير إدارة أجهزة	رائد.قعود@sfda.gov.sa	4524
سعد عبدالله سعد الحمايد	مهندس حاسب آلي	سعد.الحمايد@sfda.gov.sa	2596
سعد زيد الككوري	مدير إدارة أجهزة	سعد.الككوري@sfda.gov.sa	2554
سعد عبدالعزيز محمد الجارالله	محلل أمن معلومات	سعد.الجارالله@sfda.gov.sa	2527
سعد عبدالله الرويس	مدير إدارة أجهزة	سعد.الرويس@sfda.gov.sa	2591
سعد عيسى المالكي	رئيس قسم التخطيط وتقنية المعلومات	سعد.المالكي@sfda.gov.sa	2759222
سلطان حمد الهوان	مهندس حاسب آلي	سلطان.الهوان@sfda.gov.sa	2547

إضافة رابط جديد

مفضلاتي

روابط هامة

وزارة التعليم العالي
وزارة الصحة
هيئة الغذاء والدواء السعودية
وزارة الداخلية

Pictured: SFDA Intranet: Employee Directory Search Results. This image shows an example of results after searching the *Employee Directory*. The directory is a standalone feature, with its own database, and integrated with other systems to provide up-to-date information.

RESULTS AND ROI

SFDA does not measure the intranet's success in hard numbers. Instead, it gauges user sentiment to help determine whether or not the site has been successful. Survey results reveal that users are happy with the new intranet, but perhaps a more important measure than satisfaction is a rise in usage. Employees are visiting the site and using it, while the old intranet was left mostly ignored.

A couple of features have been particularly well received:

- The new **Employee Directory** has received a lot of appreciation. The old directory was not updated and was not providing relevant results so users appreciate the availability of accurate and up-to-date information about their colleagues.
- **Widgets** have given users the ability to customize their homepage with information tailored to their needs.

LESSONS LEARNED

The SFDA team shares a few lessons learned:

- **Share the vision and goals** with team and stakeholders.
- **Communicate** with stakeholders early.
- **Get support** from senior management for content development and integration purposes.
- **Invest in user experience design.** A successful design leads to intranet success.
- **Make sure the site serves user needs.** Employees will be interested in visiting the intranet frequently if information is helpful and tools aid productivity.

American Medical Association (AMA) (2018)

OVERVIEW

COMPANY

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

Headquarters: Chicago, Illinois

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

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

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

TEAM

American Medical Association

Executive Leadership: Leslie Weber, Rod Sierra

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

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

West Monroe Partners

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

THE INTRANET

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

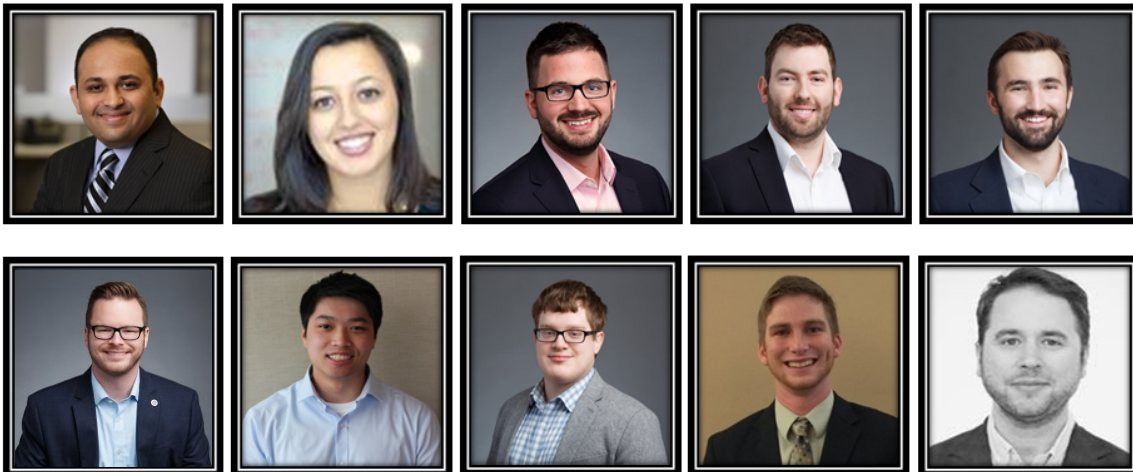
Mobile approach: Responsive web design

Technology platform: Office 365 and SharePoint Online

INTRANET TEAM



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



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

HIGHLIGHTS ABOUT THIS WINNER

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

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

Project highlights included the following components:

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

BACKGROUND

Goals

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

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

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

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

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

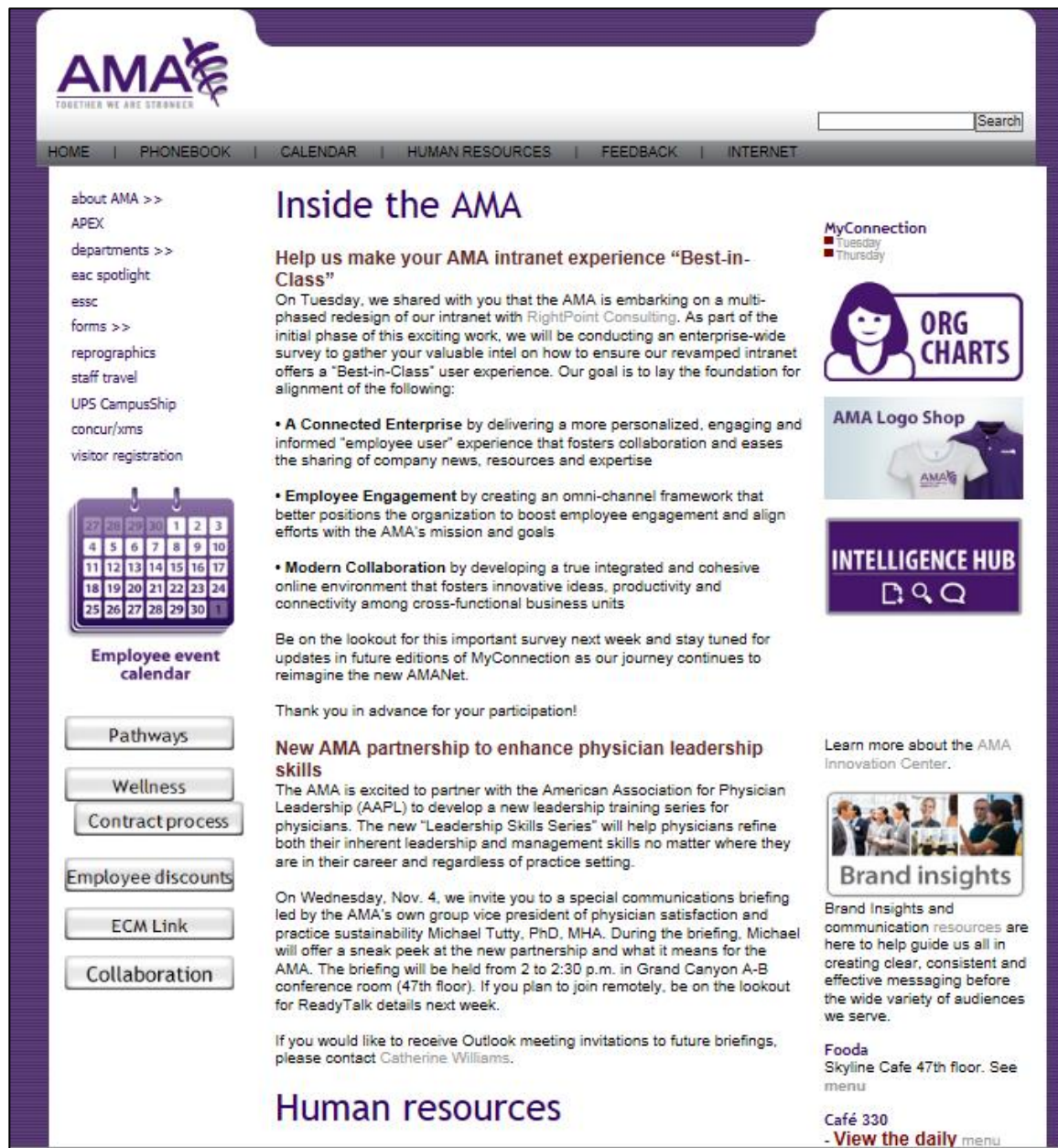
To address these concerns and improve workplace collaboration, connectivity, and efficiency, the team initiated a project to revamp the intranet into a modern digital workspace for employees. It engaged West Monroe Partners in February 2016 to assist with the effort. Working with West Monroe, the team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

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

Challenges

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

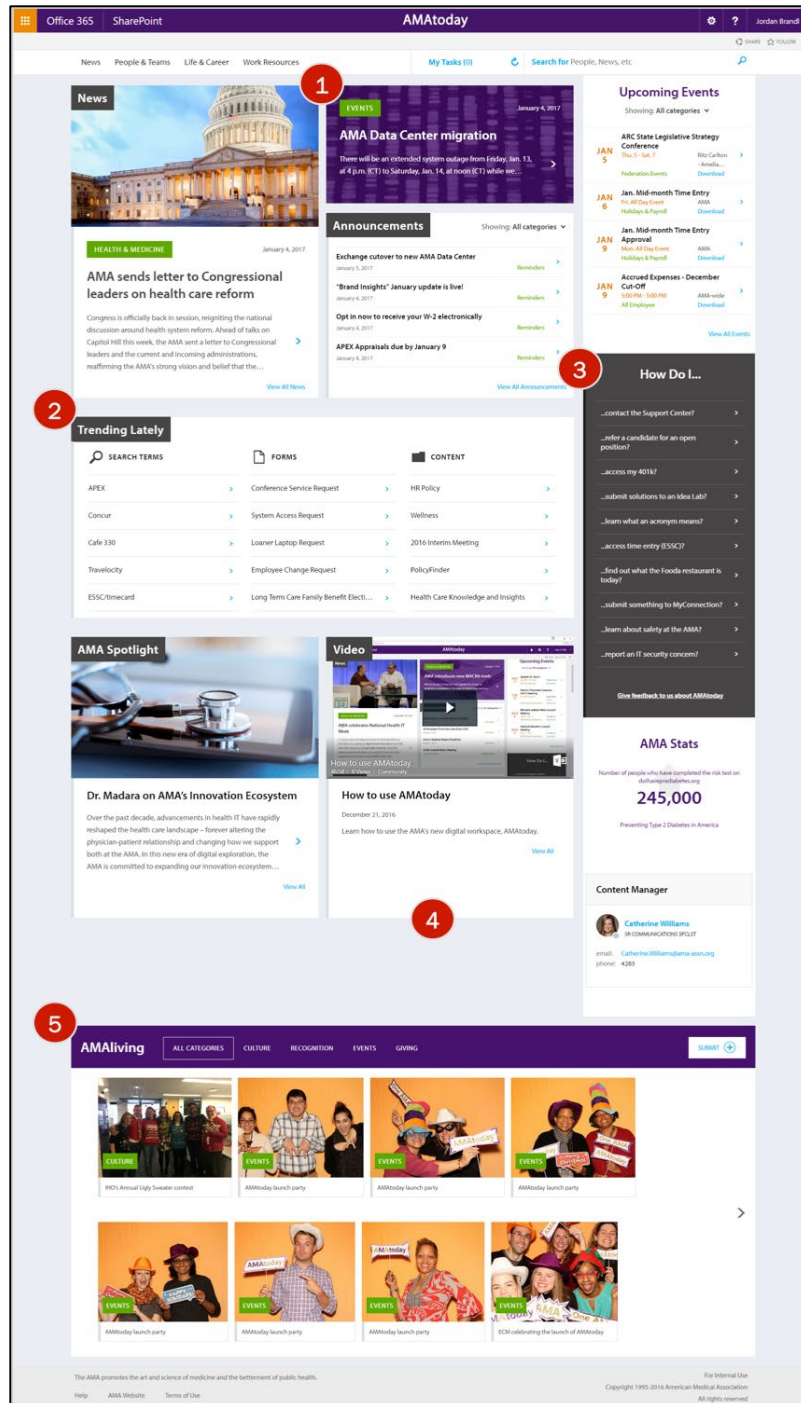
- **Aversion to change.** A key challenge in developing the new intranet was the organization's culture and traditional aversion to change. One implication? Many staff members had little familiarity or comfort with modern technologies, including digital workspaces and SharePoint Online tools. This also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



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

DESIGN REVIEW

Homepage

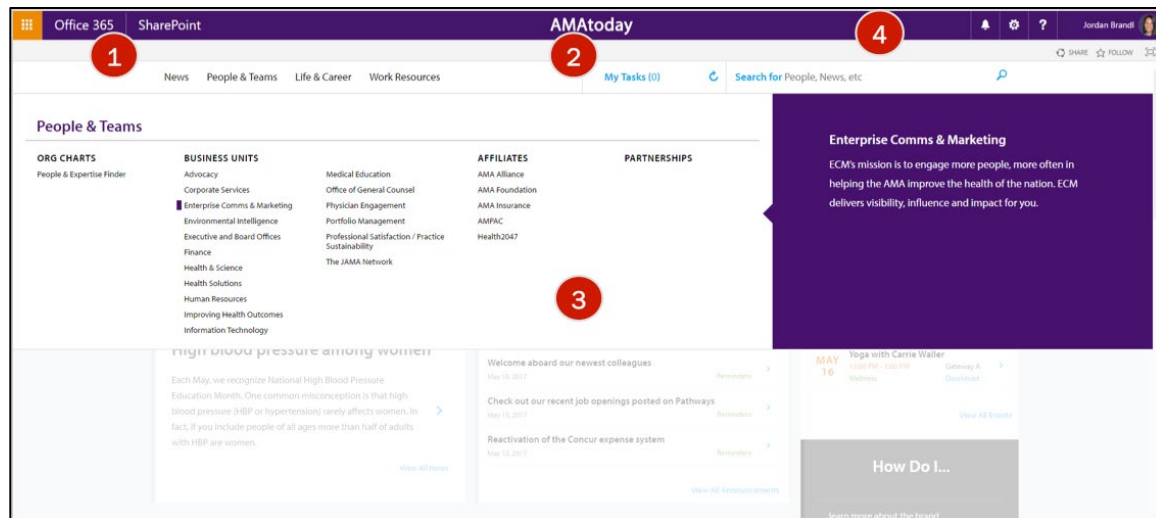


Pictured: The New AMA Intranet Homepage. The New AMAtoday homepage.

Homepage Highlights

- 1. News, Events, and Announcements.** The homepage prioritizes new and timely information, with one section dedicated to the day's top news story, another highlighting an event, and an area for announcements. *News* items are dated and accompanied by a clear headline, the first few sentences of the story, a date, and a link to read more. There is also a link to *View All News*. The business-unit-generated *Events* and *Announcements* sections also feature clear dates, so users can easily identify updated information. An *Upcoming Events* calendar, which for the first time includes events from across AMA, appears in the upper right corner, with clearly listed dates and times, links to more information, and the ability to sort events by category. Tags are a new addition to site content, which gives users another way to sort and organize information.
- 2. Trending Lately.** The homepage's *Trending Lately* section features a list of the site's recent popular search terms, forms, and content. This area acts as a shortcut to content that may be important for a limited time, such as insurance enrollment forms. A content manager curates the list based on analytics and general timeliness to ensure that the information is useful.
- 3. How Do I...** The *How Do I...* section has links to common user activities, including accessing a 401(k), contacting the Support Center, or referring a candidate for an open position.
- 4. Spotlight, Video, and Stats.** The bottom of the page is rounded out with a featured story on leadership and teams in the *AMA Spotlight* area, a featured video (in this case, an introduction to the intranet itself), informs users about interesting facts about the AMA. Corporate videos are a new addition to the site.
- 5. AMAliving.** Creating opportunities for connection was a goal of the site, particularly since one of the main offices had recently moved to a new building with fewer common areas and fewer chances for casually connecting during the workday. In response, the team created a photo-sharing section of the homepage, called *AMAliving*. Users can submit photos, which are posted pending approval by the communications team. This site area has become very popular, and the large *Submit* button shows users how easy it is to send in a photo. The screen above shows photos from the new intranet's launch party.

Navigation



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

Navigation Highlights

- 1. User-focused and task-based categories.** On the previous intranet, users struggled to find information, which was arranged based on the company's organizational structure. The new site revamped the site organization to focus on user needs and tasks. Top-level categories of *News*, *People & Teams*, *Life & Career*, and *Work Resources* make it easy for users to know where to go to find the tools and information they need for their day-to-day work. Navigational categories were created after conducting card-sorting exercises with employees.
- 2. My Tasks.** Users can access personalized content through the site's *My Tasks* section, which gives users quick information about upcoming deadlines so they can take action on assigned tasks.
- 3. Megamenu.** Navigation is displayed in a megamenu, giving users immediate access to three levels of navigation. Subcategories are displayed in all capital letters and bold type to distinguish them visually from the third-level options below. When a user hovers over a link in the megamenu, additional information about that content is displayed on the right side of the megamenu. A colored rectangle indicates the category currently being viewed, and that rectangle's color matches the background color of the information displayed on the right. The team implemented this feature with a slight hover delay to prevent the menu from flashing new content at users when they were merely mousing over categories.
- 4. Search.** Site and people search is available on every page of the site via a search box in the top right corner. Descriptive text shows users that they can search for various types of information, including people and news.

Business Units

Human Resources

What We Do For You

- BENEFITS**: We manage all the benefits offered to employees, from medical and dental to 401k, commuter benefits and everything in between. Let us help you get the most from your benefits.
- EMPLOYMENT SERVICES**: We partner with employees and managers to source and select talent, to develop and coach employees, and to consult on workplace issues and organization design.
- COMPENSATION**: We oversee AMA's compensation strategy which includes base pay, incentive plans and incentive compensation. We partner with Employment Services on position evaluations and organization design.
- LEARNING & DEVELOPMENT**: We provide employee learning and development programs both online and in the classroom. We also consult with departments, teams and leaders to create more effective teams.
- WELLNESS**: We educate and motivate employees to achieve optimal health of mind, body and spirit. Participate in eligible events to earn a credit towards benefit premiums.
- SECURITY**: We protect you from physical threats that could cause serious losses or damage to you and the organization, including fire, natural disasters, burglary, theft, vandalism and terrorism.

Business Unit Announcements

- APEX Appraisals due by January 9 (January 4, 2017) - Reminders
- 2017 AMA holiday observances (January 5, 2017) - Reminders
- Maintain, Not Gain Weigh-out (January 1, 2017) - Wellness
- Availability of pension benefit statements (December 19, 2016) - Benefits

Business Unit Events

- JAN 16**: Martin Luther King, Jr. Day (Mon, All Day Event) - All AMA offices - Download
- JAN 18**: Netflix "Cooked" Part 2- Water (12:00 PM - 1:00 PM) - Grand Canyon A/B - Download
- JAN 24**: On-site Health Coaching Open House (12:00 PM - 1:00 PM) - Yosemite - Download

Key Contacts

- Advocacy, Per Pub**: Toni Canada
- Strategy, IT**: Mary Hobbs
- HR, Finance, JAMA, HSG**: Gretchen Neeter
- Physician Engagement, Foundation, ECM, and OGC**: Debra Hyl
- EVP/Board Operations, USC, Corporate Services**: Kelly Sewert

Important Links

- HR LINKS**: ESSC, Pathways, APEX, Motivation, Fidelity
- COMMUTER BENEFITS**: Program Information, Plan Highlights, FAQs, Enrollment
- BENEFITS**: Medical, Leave of Absence, 401(k), Life Events

Leadership

Bob Davis
SVP- HR/CORP SVCS
email: Bob.Davis@ama-assn.org
phone: 4340

How Do I...

- ...add a spouse or dependent to my insurance due to a life event?
- ...change my 401(k) contributions?
- ...request vacation carryover beyond 10 days?
- ...learn about professional development and training?
- ...change my name and address?
- ...get a replacement ID badge?
- ...initiate a leave of absence?
- ...earn a Wellness credit?
- ...look for a new position at the AMA?
- ...refer a candidate for an open job at the AMA?

Content Manager

Joe Lebeau
DIR- HR SYSTEMS-OPERS
email: Joe.L@ama-assn.org
phone: 4215

Content Last Updated: December 14, 2016

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Pictured: AMA Intranet Business Unit Template. This same template was used for all business units, and is the jumping-off point for this business unit's site.

Business Unit Highlights

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

Content Pages

Employee communications

We keep our organization and colleagues connected – to each other, our mission, and the work we do each and every day on behalf of our nation's physicians and patients.

Your connection to the news you need to know

In addition to AMAtoday, our team manages several communications channels, including: an internal e-newsletter; the digital signage at AMA headquarters; all-employee events and celebrations; and the emergency alert system.

- **AMAtoday**, our primary employee communications channel, brings the concept of OneAMA to life. It is your employee news source, connecting colleagues and informing you of upcoming events, deadlines and announcements. AMAtoday also functions as a digital workspace, where you can learn about AMA administrative processes, find (and even submit) forms and find an expert.

AMAtoday's editorial philosophy: We provide you with relevant, engaging, timely and smart content to help you do your work.

Frequently featured news on AMAtoday:

- Breaking AMA and industry news
- AMA Spotlights: special recognition for individuals, teams, or new initiatives
- Leadership updates
- Milestones: updates on strategic initiatives
- AMA social media spotlight (i.e. #AMASocial)
- AMA events coverage: Read about what happened at the HOD or other AMA-sponsored event

Content for AMAtoday is driven by our readers – and you can help us make it engaging, fun, relevant and timely. We welcome your ideas.

- **Open call for AMAtoday Spotlight news**
Nominate your department, a co-worker or an exciting new project to be featured on the AMAtoday home page in an upcoming Spotlight feature. Simply send your request to the [Employee Communications](#) inbox.
- **MyConnection** is a twice-weekly internal e-newsletter designed to keep employees engaged with the latest AMA news and events and connected to AMAtoday and AMA's other digital channels, such as AMA's website, *AMA Wire*® and our physician newsletters. It is published on Tuesdays and Thursdays and all employees are encouraged to submit new items for consideration to the [Employee Communications](#) inbox. Submission deadlines for MyConnection are as follows:
 - Tuesday edition: Friday noon CT
 - Thursday edition: Tuesday noon CT
- **Digital signage:** Experience a slice of AMA culture while you wait for that next elevator! Find reminders, special AMA news feeds, employee photos and special announcements on the digital signage in each elevator lobby at AMA headquarters. If you have an idea of what we should share on those signs, let us know.
- **All-employee briefings**
Employee Communications Briefings are monthly, cross-departmental meetings that are open to all employees. These briefings act as an informal "show and tell" for AMA projects, news and initiatives. For more information on co-hosting a briefing with the employee communications team, please contact [Catherine Williams](#), ext. 4283.

We want to hear from you! Share your feedback, contributions and questions with us at employee.communications@ama-assn.org.

Content Author

Catherine Williams
SR COMMUNICATIONS SPCLST
email: Catherine.Williams@ama-assn.org
phone: 4283

Content Last Updated: November 30, 2016

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

Content Page Highlights

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

Forms

Forms Center

1

2

3

FORM NAME	DESCRIPTION	ALL BUSINESS UNITS	PROCESS
Accrual Request	Submit this form to accrue for invoices that have missed the accounts payable processing window for the current accounting period.	Finance	Accrual Request
Conference Services Request	Use this form to book a conference room, and request A/V support, room layout preferences, and catering options.	Corporate Services	Meeting Request
Employee Change Request	Managers should submit this form to HR for processing of employees changes (job, pay, or transfers (supervisor, unit) that are not tied to a job requisition in Pathways.	Human Resources	Employee Job Changes
End of Employment	HR initiates this form for all terminating employees (regular, contract, intern). Form will be reviewed and approved by both the departing employee and supervisor.	Human Resources	Employment Termination
Equipment/Space Allocation	Submit this form if there is a new/existing employee that is moving into a workspace.	Corporate Services	Onboarding/Employee Change
Hardware and Software Request	Submit this form if you need to purchase computer technology for use in the AMA. Consumables such as thumb drives, toner cartridges and headsets should be ordered directly through STAPLES and not through this form.	Information Technology	Onboarding/Technology Needs
Loaner Laptop Request	Submit this form if you need to borrow a laptop in order to conduct AMA business while traveling	Information Technology	Travel
New Entity Request	Submit this form to request new entities, or manage existing entities (departments, projects, activities) and accounts.	Finance	New Entity Request
System Access Request	Submit this form if you need establish or delete an AMA login ID, to gain access to network folders, or an AMA email account. Use the Unix/Database access form for Database, Lawson or AIMS application access.	Information Technology	Onboarding
Tuition Assistance Application	Employees should submit this form to HR for approval of all requests for tuition assistance, prior to the start of the course. Form requires manager approval before submission.	Human Resources	Tuition Assistance

Content Manager

Corporate Services Form Owner

Finance Form Owner

HR Form Owner

IT Form Owner

Corporate Services Form Owner

Physician Engagement Form Owner

Content Last Updated: January 3, 2017

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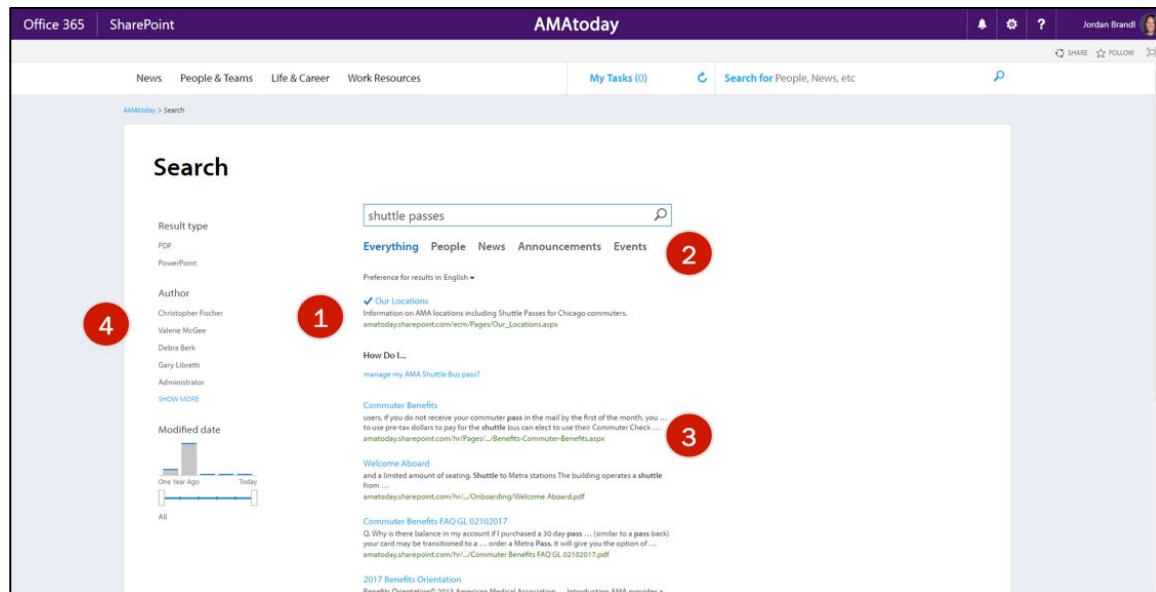
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Pictured: AMA Intranet Forms Center. Here the forms tab in the *Forms Center* is selected, with a key showing the iconography of form types: web, external, or downloadable. Forms are listed below this, with descriptions, business units, and processes.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

Forms Highlights

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

Search



Pictured: AMA Intranet Search. This example search page includes people, returned at the top and bracketed together with pagination.

Search Highlights

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

DESIGN PROCESS AND USABILITY WORK

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

Design Approach

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

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

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

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

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

These personas helped team members match features to profiles, helping them make decisions about visual layout, IA, and security and permissions.

- **Content analysis.** The combined project team also analyzed the top content needs, gathered through employee feedback, and decided to relaunch the site with 120 pages of content, down from 27,000 on the previous intranet.
- **Use cases.** The team also analyzed use cases to prioritize which forms to automate (such as those offering the greatest timesaving opportunities).

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

The screenshot displays the AMAtoday intranet interface. At the top, there's a navigation bar with 'Office 365', 'Delve', and 'AMAtoday' logos, along with notification and settings icons. The left sidebar contains a search bar and navigation links for 'Home', 'Me', and 'Favorites'. Below these are sections for 'People' and 'People' (repeated), each listing several employee names with their profile pictures. The main content area features the profile of Jordan Brandl, an SR Project Manager (IT) at AMA. Her profile includes a header with her name and title, a 'Contact Info' section with email addresses (Jordan.Brandl@ama-assn.org, jbrandl@ama-assn.org), a phone number (4820), and a mobile number (773-936-3804). It also shows 'OneDrive files shared with me' and a 'Today' calendar. The 'About me' section describes her 15 years of experience in the healthcare industry and lists her current roles: AMAtoday, PolicyFinder, AMAstore, Intelligence Hub, Board Portal, MACRA 2.0, and Project Management, Business Analysis, Requirements Analysis, Process Improvement, SharePoint, vendor management, Development Life Cycle (SDLC), Agile, Issue Management, Risk Mitigation, and Customer Persona Development. It also mentions her education at Columbia College Chicago. An 'Organization' chart shows her reporting structure, including James Madara (CEO), Bernard Hengesbaugh (COO), Leslie Weber (SVP & Chief Information Officer), Doug Fedorchak (Director of Software Strategy/Delivery), and Melvin Petties (Consultant). A right-hand panel contains a message about document sharing and a section titled 'Click a person to see what they're working on' with four colleague profiles: Doug Fedorchak, Melvin Petties, Jim Krzyzewski, and Shiraz Najam.

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

Information Architecture

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

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

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

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

Getting Buy-In

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

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

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

Print ads outlined the site’s new features and functionality. On launch day, December 1, 2016, the intranet team hosted an all-employee open house, with snacks and a fully staffed information booth to help employees log on for the first time. The launch events also featured interactive contests to help employees discover the new platform’s features and content. The goal was to get users comfortable by breaking

the ice on the new site. Those who stepped up to the challenge (more than 300) won AMAtoday swag. These early efforts were key to generating early user adoption and increasing the average daily use to better than 50%.

GOVERNANCE

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

URL AND ACCESS

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

TIMELINE

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

CONTENT AND CONTENT CONTRIBUTORS

Content Management Team

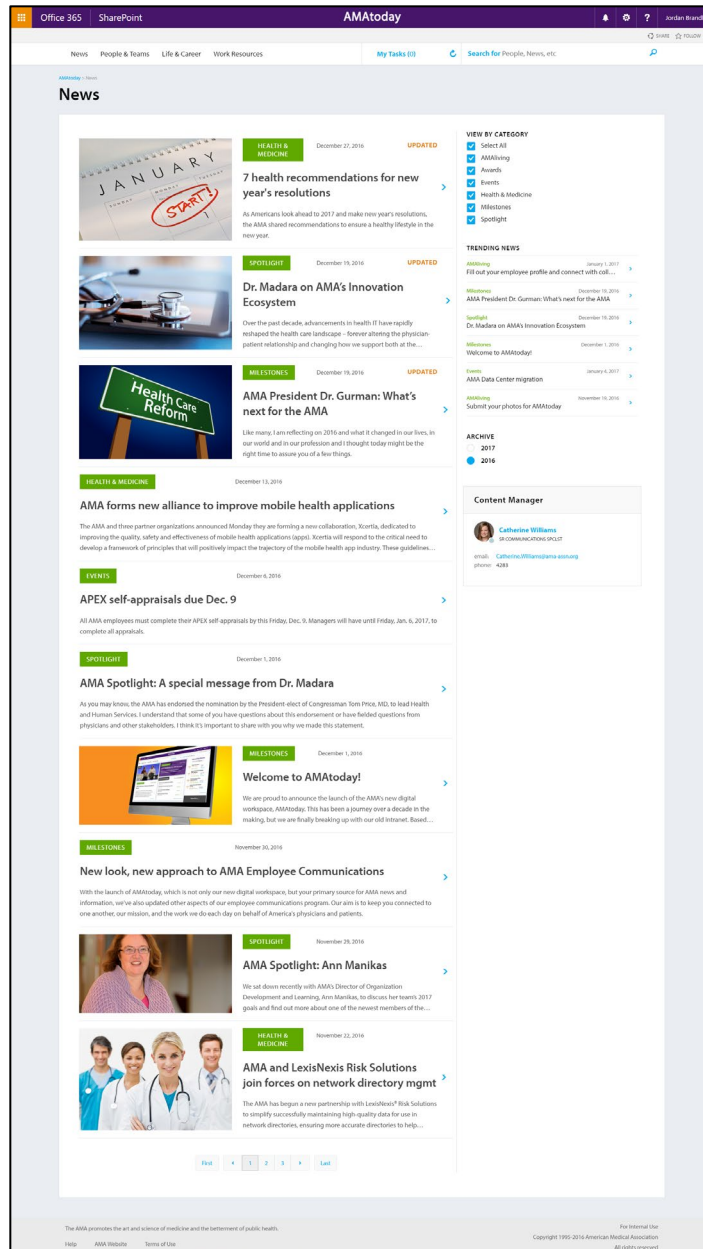
The AMAtoday content management team consists of 18 content managers representing each of the groups listed under the main navigation's *People & Teams* section. Content managers serve as the first point of contact for their respective business unit and as a liaison to Employee Communications. They also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

Specific responsibilities include:

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

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

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



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

Culling Content

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

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

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

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

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

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

AMAtoday Content Guidelines and Procedures

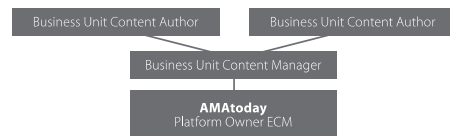
Content Author(s) (Business Unit)

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

Platform Owner (ECM)

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

AMAtoday: Hybrid governance model



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

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

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

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

Tagging and metadata guidelines

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

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

Events

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

Announcements

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

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

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

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

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

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

TECHNOLOGY

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

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

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

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

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

Customizing Office 365

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

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

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

Print to PDF

AMA Logo

Form status: Pending Support Center Pick Up Confirmation

Loaner Laptop Request

Directions for Reserving a Loaner Laptop

- Complete the User Information below for the intended user of the laptop
- Complete the Requestor Information below with your information; this is signifying that you will be taking responsibility for the pickup and drop-off of the laptop.
- Please submit this form at least 2 business days before the date that the laptop is required
- Please contact the Support center 25999 or SupportCenter@ama-ass.org with any questions

Loaner Laptop Specifications

The Technology Group maintains a pool of laptop computers for AMA employees who require a computer while away from the office on AMA business. Each laptop is equipped with:

- Power cable
- Charger
- Current version of Microsoft Office Suite
- Current version of Microsoft Internet Explorer
- Current version of Adobe Reader

All loaner laptops are subject to availability

User Information (Notes: * Indicates required field; ** Email fields require you to input name or email and select from list)

User's Name (Person)** Mark Cruz	User's Telephone or Ext* 4239	User's Mobile 312-498-4287
User's Office No.* 46270	Budget Code* FCB	Department Name* General Accounting

Requestor Information

Requestor's Name (Person)** Mark Cruz	Requestor's Telephone or Ext* 4239	Requestor's Mobile 312-498-4287
Requestor's Office No.* 46270	Date Required* 12/9/2016	Please submit this form at least 2 business days before the date that the loaner laptop is required. * Indicated as a shorter timeframe than 2 business days is not guaranteed.

Conditions of Use

- You are responsible for the laptop while it is in your possession. Please review the [Acceptable use of technology policy](#)
- You are not authorized to download or install any applications including music or games.
- You must return the laptop on the date stated or contact the Support Center at 25999 with your revised return date.
- You should not store PC, PII or PI information on this machine. If you are required to for business, you must remove it before returning the machine (include emptying recycle bin).
- If you must store data on this computer during use, you should insure that it is removed before returning the laptop. Immediately upon return, all data will be wiped.

Request Information

Currently are you using an AMA laptop? ☒ Yes ☐ No

Business Reason for Laptop*
Office meeting

Predicted Pick Up Date
12/9/2016

Predicted Return Date
12/9/2016

Additional Information
Need laptop on Friday for travel next week.

Workflow

☒ Ready for Pick Up

Pick Up Comments
Loaner #026 is ready in the PC Build Room on the 40th floor.

☐ Support Center Pick Up Confirmation

Pick Up Date
12/9/2016

Pick Up Person
[Empty]

☐ Support Center Drop Off Confirmation

Drop Off Date
12/9/2016

Drop Off Person
[Empty]

Support Only

Support Center Approver (Person) Bruce Toms	Support Center Approval Approved	Loaner Laptop No. 00026	Support Center Approval Date 12/9/2016 8 AM + 08
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Approval Comments
Laptop is ready for Pickup.

SUBMIT **CLOSE**

Once you submit this form, you cannot edit the form.

Support Center Email: SupportCenter@ama-ass.org

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

ROI

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

KPIs

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

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

- **Increase in employee engagement and satisfaction.** The baseline for this goal was based on adoption (daily use) and results of a future survey (see softer measures below). As noted above, the previous platform's adoption was 4%. The project goal was to increase that by 20–40%. Based on Google analytics data, an average of 532 users, or 54% of employees, now use the site daily.
- **Increase in employee self-service engagement.** The team has three primary KPIs for this goal:
 - **Reduction in time spent populating key forms.** The baseline was 10 minutes per form and the goal was to reduce this by 20%. Currently, users spend an average of 2–5 minutes per form — a reduction of at least 50%. With thousands of forms populated to date, hundreds of hours of employee time have been saved.
 - **Reduced IT support center calls.** The baseline was 1,800 calls and emails per month, and the goal was to reduce this by 10%. Today, there are an average of 1,438 calls and emails per month, representing a 19% reduction in call center calls.
 - **Reduction in enterprise internal emails.** The baseline was 7,500 internal emails sent per month (by the top 50 senders), and the goal was to reduce that by 10%. Today, the top 50 users send, on average, 6,231 internal emails — a reduction of 19%.
- **Connect employees.** The baseline was 330 monthly page visits to four business unit pages; the goal was to increase page visits to other business units by 50%. Today, the 18 business unit pages have received more than 10,000 total page visits — a 3,900% increase.
- **Serve as an information gateway.** The baseline was a 9% click-through rate from the intranet to other AMA business tools, and the goal was to increase that by 20%. Today, the click-through rate to the top five business tools (including time entry, wellness program, career planning and jobs board) has increased by 32%.

Softer Metrics

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

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

The preliminary findings include:

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

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

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

LESSONS LEARNED

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

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

Best Practices

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

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

Archer Malmo (2018)

OVERVIEW

COMPANY

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

Headquarters: Memphis, Tennessee

Company locations: Memphis, Tennessee, and Austin, Texas

Locations where people use the intranet: Memphis and Austin

Annual revenue: \$26M

THE INTRANET

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

Mobile approach: Responsive web design

Technology platform: WordPress

TEAM

Design team

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

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

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

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

Human Resources: Trish Swope, Director of HR

INTRANET TEAM



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

HIGHLIGHTS ABOUT THIS WINNER

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

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

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

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

BACKGROUND

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

When hatching plans for a new intranet, the company knew that providing HR information and technical support was a given, but it also wanted to go further and create something more scalable and flexible that would accommodate its needs going forward. In 2015, the company opened a new office in Austin, Texas, and its creative department began building new brand guidelines to update the look and feel

and refine various brand assets. The company thus saw a window of opportunity to finally create a useful intranet that would serve the organization now and into the future.

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

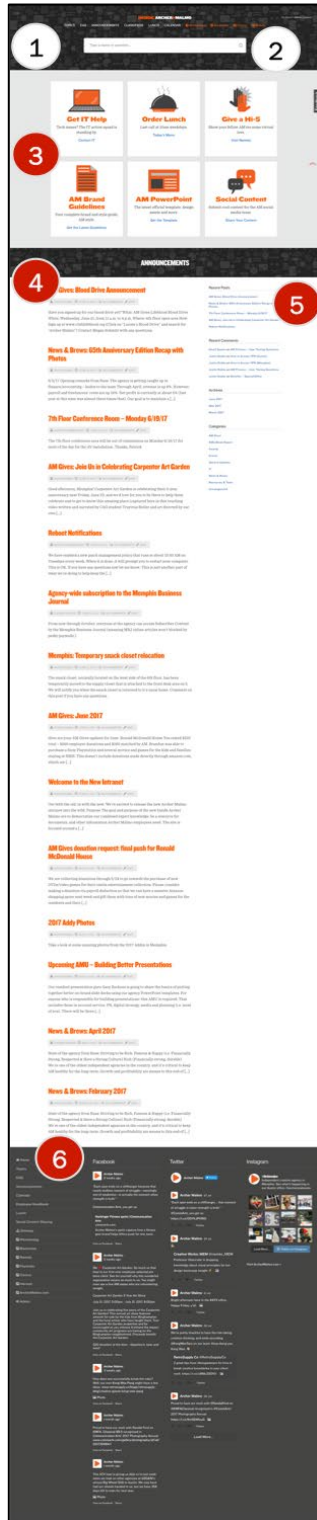
In Q4 of 2016, company leaders began discussing a redesign for the public-facing website and it quickly became clear that many of the needed tools would be best served from an intranet platform. For example, they discovered that team members had a very hard time accessing information about specific clients.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

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

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

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

DESIGN REVIEW



Homepage

Pictured: Archer Malmo Intranet Homepage. The homepage is uncluttered and makes the employees' top tasks easy to find.

Homepage Highlights

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

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

number of comments, and an edit icon, followed by the first part of the announcement, which offers a good taste of the topic.

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



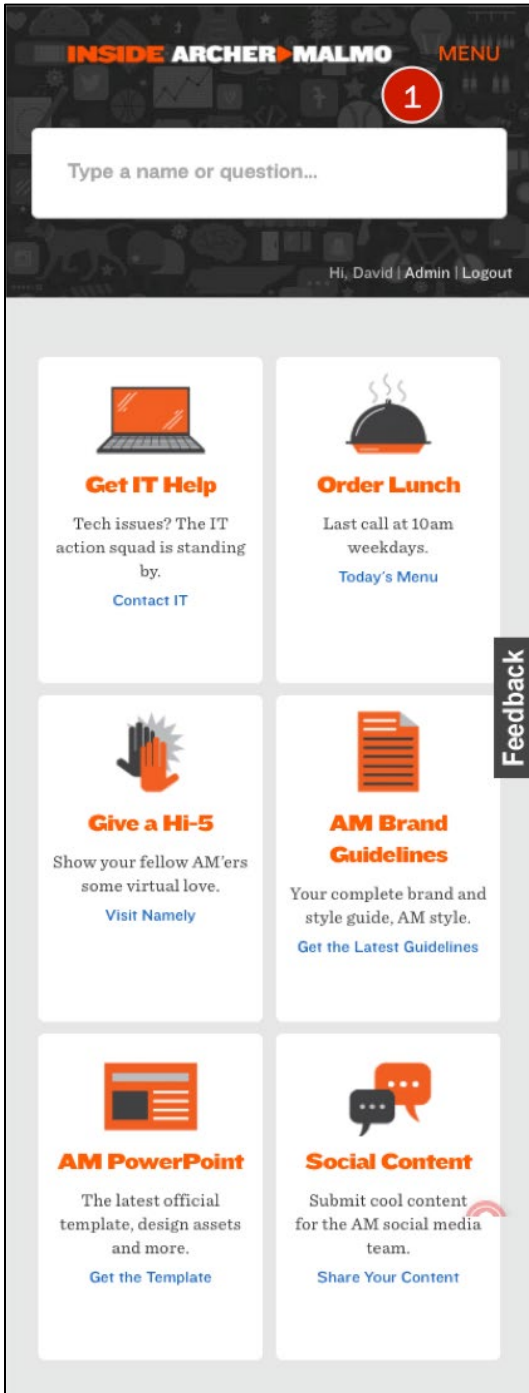
Mobile Homepage

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

Mobile Homepage Highlights

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

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

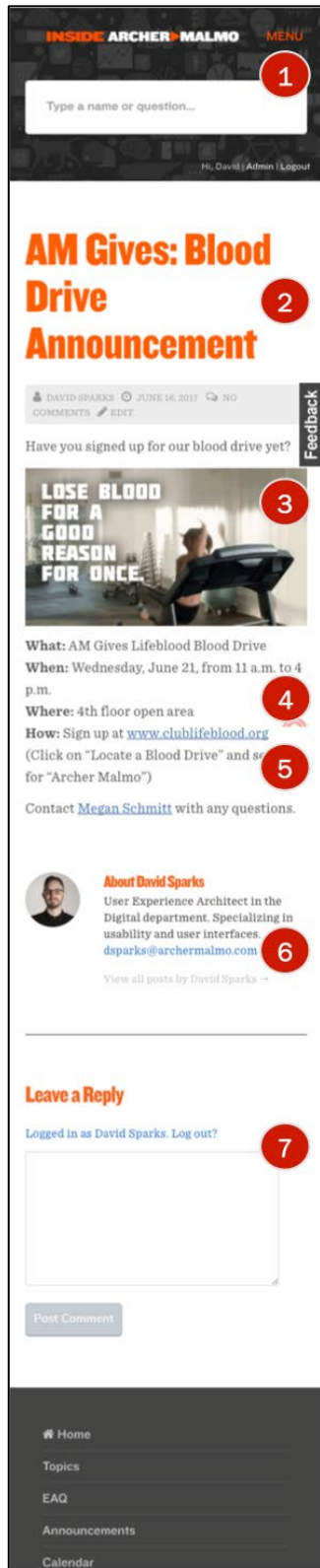


Mobile Homepage, Closed Menu

Pictured: Archer Malmö Intranet Mobile Homepage Menu. The menu link in the upper right (shown here zoomed in) opens and closes the list of navigation links.

Mobile Homepage, Closed Menu Highlights

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



Announcement Page, Mobile

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

Announcement Page, Mobile Highlights

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

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

INSIDE ARCHER MALMO

TOPICS | **EAQ** | ANNOUNCEMENTS | CLASSIFIEDS | LUNCH | CALENDAR | [Workcamp](#) | [Emailcard](#) | [Center](#) | [History](#)

8 Type a name or question...

1 Employee Asked Questions

Wanna better understand email marketing best practices? Looking for AM'ers with experience in outdoors retail? Just need to know timesheets work?

When you know you need help, but don't know who to ask, EAQ is a place to start. Ask a question, or answer one. You'll be notified when your question/answer has been posted.

Have a non-work-related question? Take it to the [Classifieds](#) forums.

2 Submit your EAQ

Your Name:

Your Email:

I am... ☒ Answering a Question ☐ Asking a Question

Question:

Answer:

3

4

5

6

7

How long does digital QA take?

Who do I talk to about 3D printing?

What browsers do we support in development?

What are wireframes?

What can interns do?

What is "intern shadowing"?

How long are interns around?

What if I don't hear back from my intern request?

Facebook

Archer Malmo 2 weeks ago

"Each spot ends on a cliffhanger because that nearly endless moment of struggle—essentially one of weakness—is actually the moment when strength is built."

Communication Arts, you got us.

Harbinger Fitness spots | Communication Arts

Archer Malmo's spots capture how a fitness gear brand helps others push for one more.

Archer Malmo 2 weeks ago

We Carpenter Art Garden. So much so that they're our first-ever employee-selected projects client. See for yourself why this wonderful organization means so much to us. You might even see a few AM peeps who are volunteering tonight.

Carpenter Art Garden 5 Year Art Show

July 21, 2017 5:00pm - July 21, 2017 8:00pm

Join us in celebrating five years of the Carpenter Art Garden! This annual art show features artwork for sale by the kids from Birmingham and the local artists who have taught them. Your Carpenter Art Garden perspective and be encouraged as you witness firsthand the impact community art programs are having on the Birmingham neighborhood. Proceeds benefit the Carpenter Art Garden.

\$20 donation at the door - Appetizers, beer and wine!

Archer Malmo 3 weeks ago

How does one successfully break the rules? Well, our own King Wee Pang might have a few ideas. www.retrosupply.co/blog/retrosupply-blog/creative-giants-king-wee-pang

Archer Malmo 1 month ago

Proud to have our work with Randal Ford on KMFA Classical 89.5 recognized in Communication Arts 2017 Photography Annual. www.comarts.com/gallery/photography/all/all/2017/8484/

Archer Malmo 1 month ago

This ATX heat is giving us déjà vu to last week when we took on other agencies at GSD&M's annual Big Wheel 500 in Austin. We may have had our wheels handed to us, but we have 365 days left to train for next year.

Twitter

Archer Malmo 27 Jul

"Each spot ends on a cliffhanger... that moment of struggle is when strength is built."

@CommArts, you got us. <https://t.co/0DYXJPH8KD>

Archer Malmo 21 Jul

Creative Works: MEM @cworks_MEM

Professor @memcolor is dropping knowledge about visual principles for our design bootcamp tonight 📺

Archer Malmo 21 Jul

Bright afternoon here in the R&TX office. Happy Friday, y'all. 🌞

Archer Malmo 20 Jul

We're pretty thankful to have the risk-taking, creative-thinking, and smile-spreading @KingWeeTara on our team. Keep doing you, King Wee. 🙌

RetroSupply Co @RetroSupplyCo

2 great tips from @RetroSupplyCo for how to break creative boundaries in your client work. <https://t.co/8BmAZIOHIV>

Archer Malmo 20 Jun

Proud to have our work with @RandalFord on @KMFAClassical recognized in @CommArts' 2017 Photography Annual. <https://t.co/NrSGWwUeUG>

Instagram

@archermalmo

Independent creative agency in Memphis. See what's happening in our Austin office: [archermalmoaustin](https://www.instagram.com/archermalmoaustin)

Visit ArcherMalmo.com

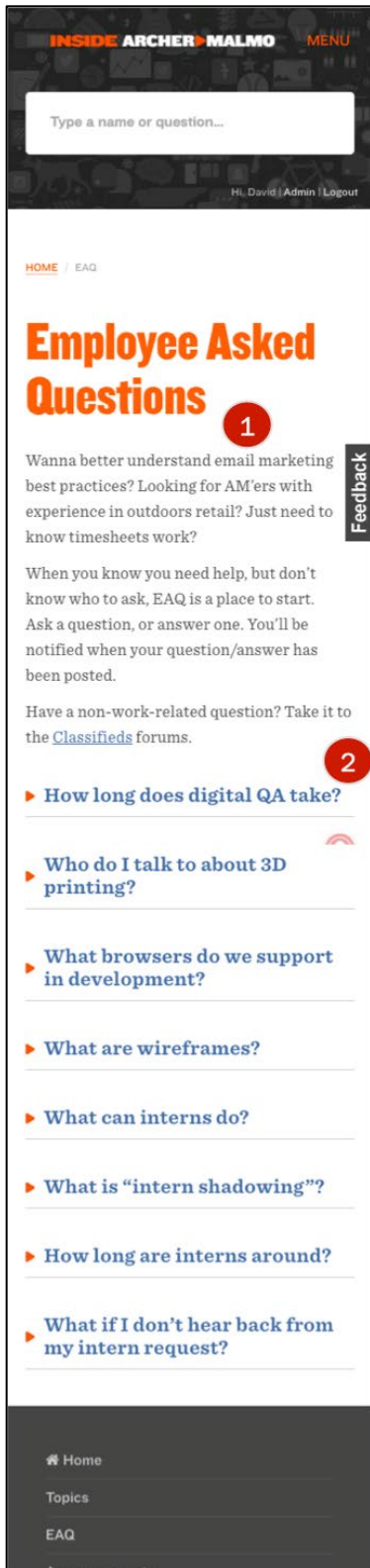
Employee Asked Questions

Pictured: Archer Malmo Intranet Employee Asked Questions. The EAQ page lets employees ask questions of one another, answer questions, and read

Employee Asked Questions Highlights

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

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



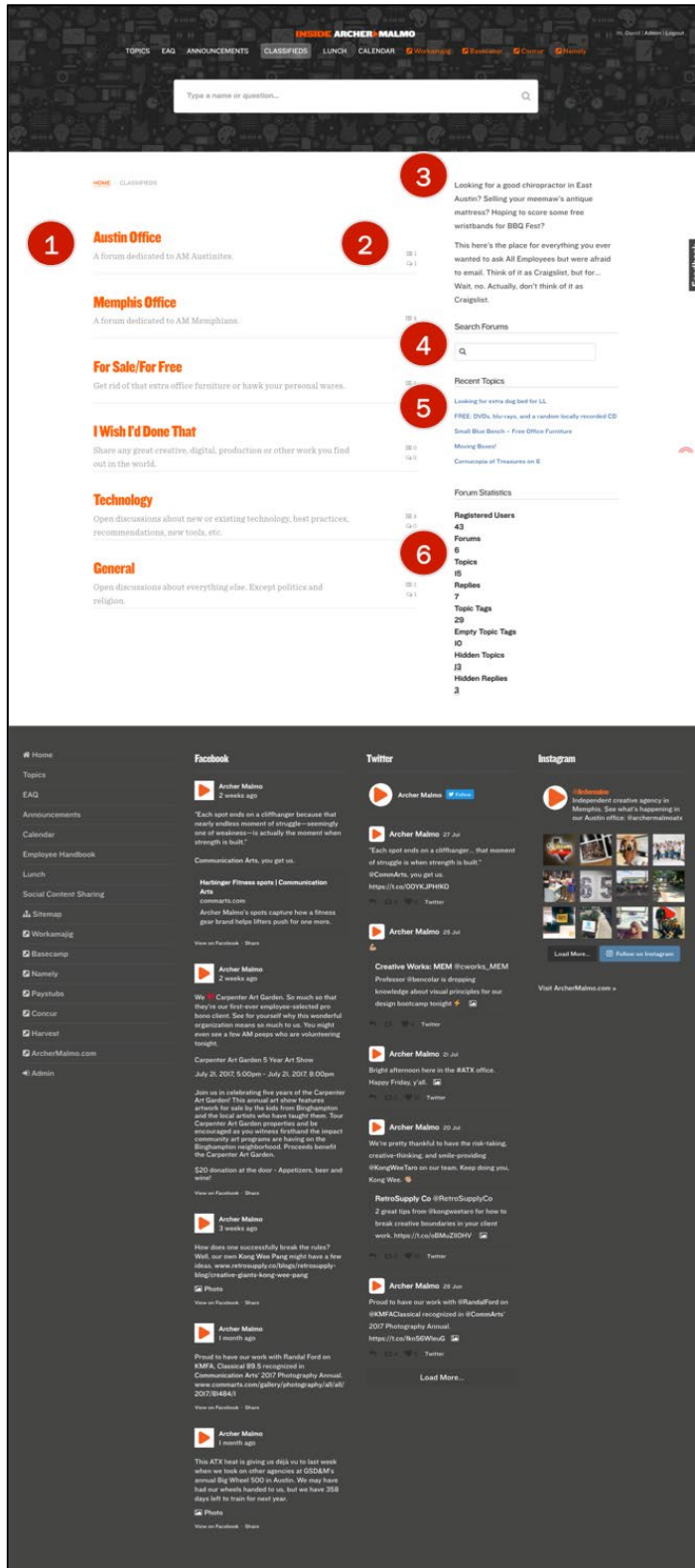
Employee Asked Questions, Mobile

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

Employee Asked Questions, Mobile Highlights

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

- 1. Explanation.** The first section includes question examples and a request for people to ask questions.
- 2. Questions.** The question list displays next on the screen. The list is tall and the text is legible, making the questions easy to read and to tap to view answers.



Classifieds

Pictured: Archer Malmo Intranet Classifieds.

Employees can talk about non-work topics and buy and sell items in the intranet's *Classifieds* section.

Classifieds Highlights

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



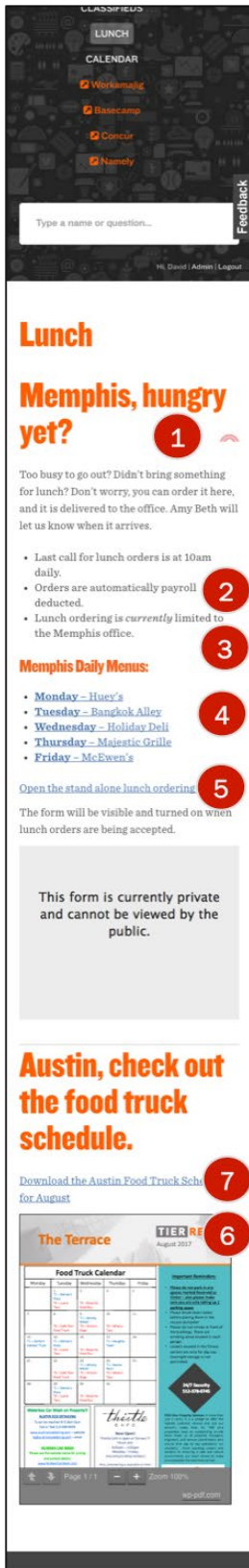
Pictured: Archer Malmö Intranet Social Sharing.

1

Social Sharing Ideas Highlights

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

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



Lunch Ordering, Mobile

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

Lunch Ordering, Mobile Highlights

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

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

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



PowerPoint Templates and Assets, Mobile

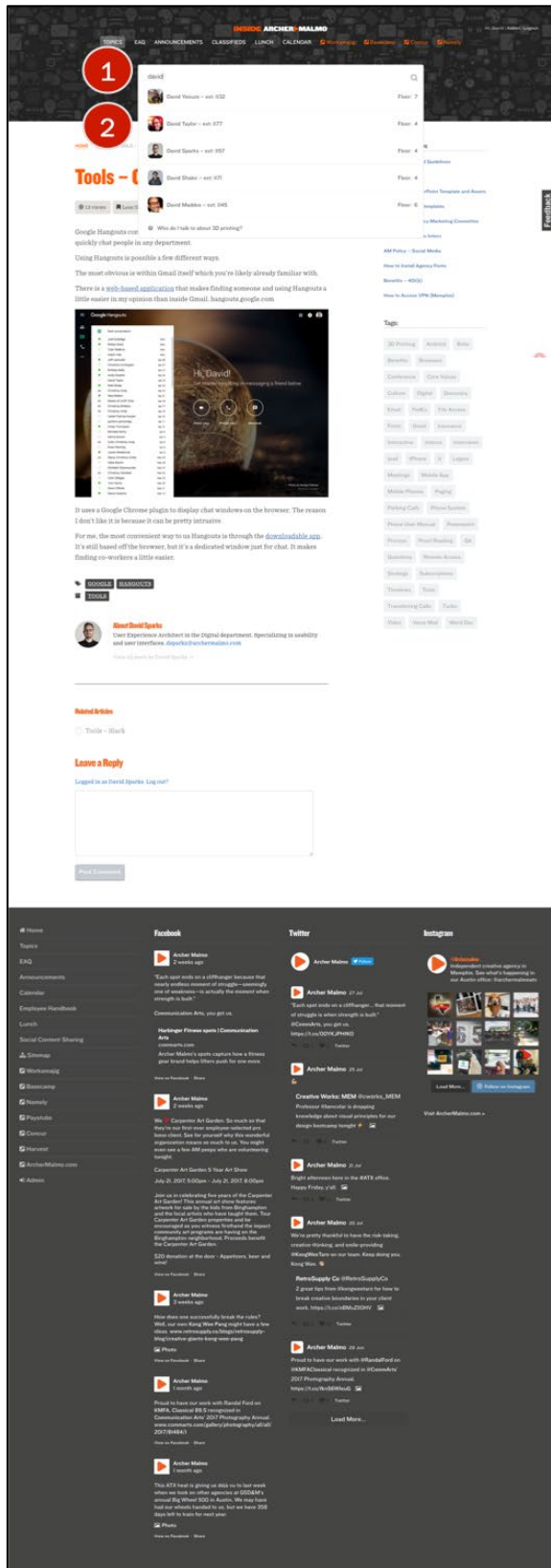
Pictured: Archer Malmo Intranet PowerPoint Templates and Assets — Mobile View. A mobile view (zoomed in) of how employees find and share the most updated templates and client pitches on the intranet.

PowerPoint Templates and Assets, Mobile Highlights

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

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

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



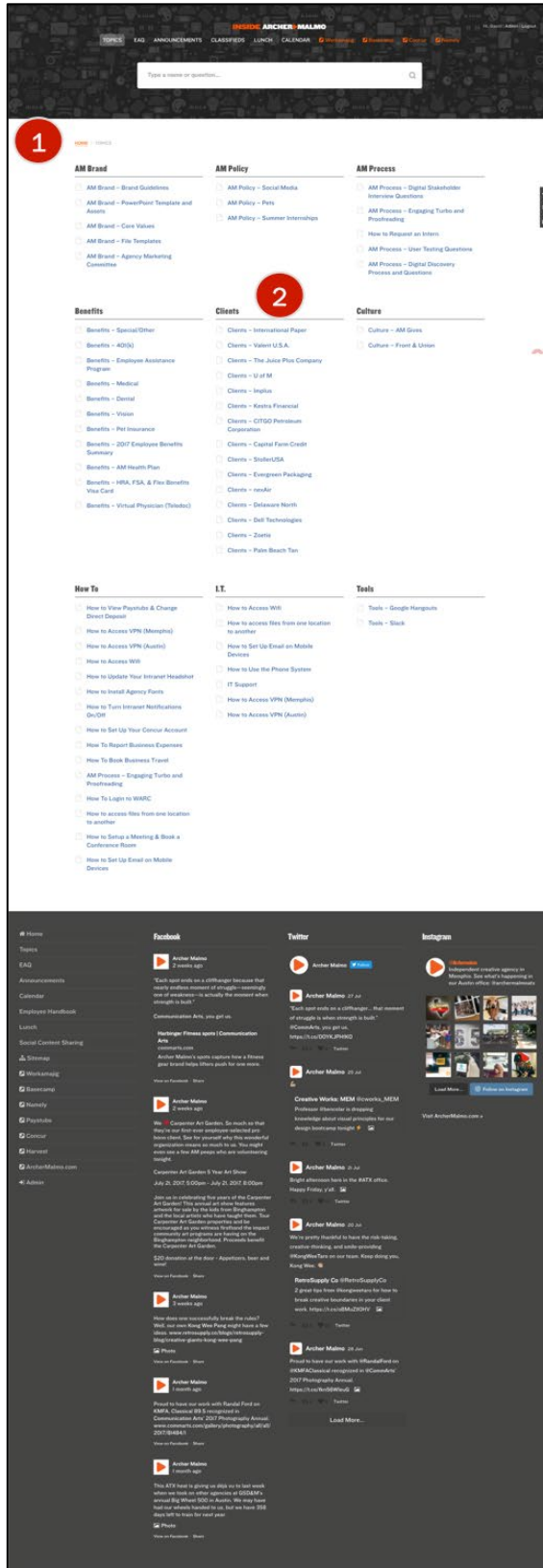
Employee Search

Pictured: Archer Malmö Intranet Employee Search. As the user types a name, live search pops up a list of people with that name.

Employee Search Highlights

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

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



Topics

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

Topics Highlights

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



Topics, Mobile

Pictured: Archer Malmo Intranet Topics — Mobile View. *Topics* and their wiki functionality (here, zoomed in) are also available on mobile devices.

Topics, Mobile Highlights

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

DESIGN PROCESS AND USABILITY WORK

An Accidental Intranet Project

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

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

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

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

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

Information Architecture

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

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

Menu Approach and Navigation

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

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

Adoption and Buy-In

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

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

GOVERNANCE

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

Ownership

The goal for the intranet has always been that it be owned by all employees. Staff members come and go, but the information is always needed. The digital, HR, and creative teams own the intranet most directly; the agency's UX Architect David Sparks is the site's "keeper" until the email campaign and training sessions are

complete. These sessions will help aid in buy-in and will disperse ownership to subject matter experts.

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

URL AND ACCESS

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

TIMELINE

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



Pictured: Archer Malmo Intranet Old Homepage. The homepage of the agency's old intranet, which was powered by Google Sites.

CONTENT AND CONTENT CONTRIBUTORS

Governance

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

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

Contribution

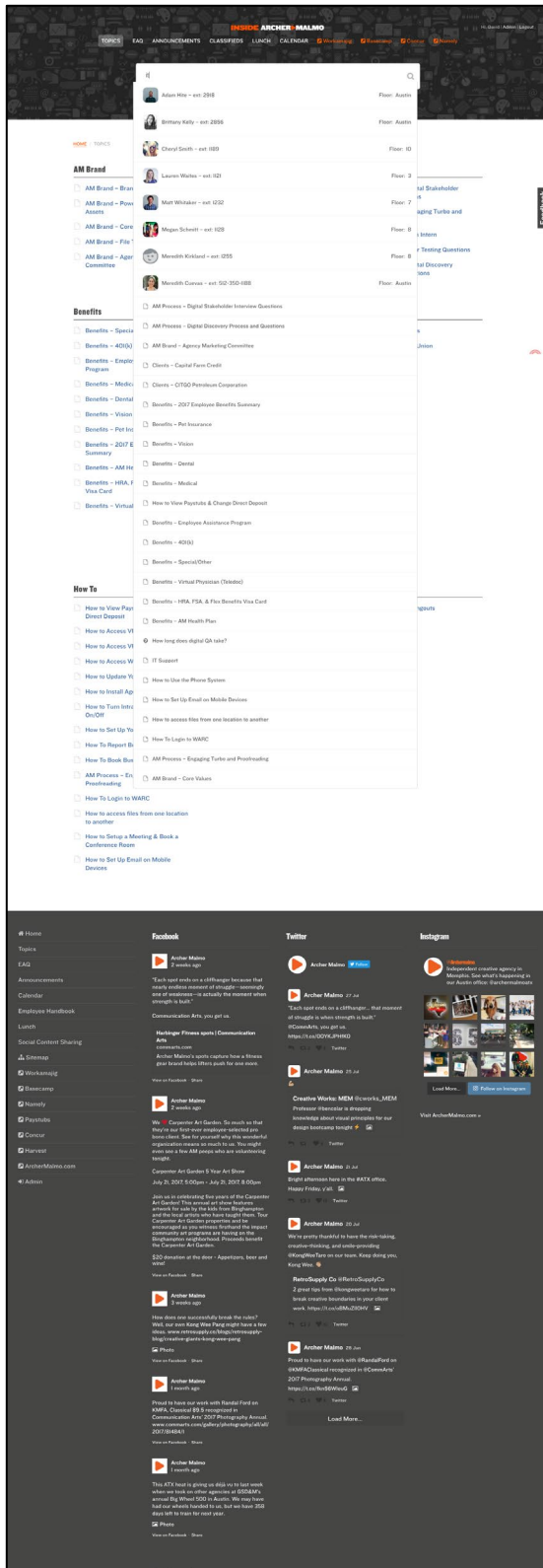
To date, approximately 10–15 contributors have created pages on their own or with assistance. Contribution is encouraged by flagging all staff emails that should actually be intranet content. When these group emails go out, a team member will ask the senders if they would like the information posted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

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

Other content-related activities include:

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





Pictured: Archer Malmo Intranet Search. A powerful search function was necessary to ensure the new intranet's success and adoption. Search is augmented through the use of Namely.



TECHNOLOGY

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

ROI

Positive Reviews

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

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

LESSONS LEARNED

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

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

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

Capital Power (2018)

OVERVIEW

COMPANY

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

Headquarters: Edmonton, Alberta, Canada

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

Locations where users use the intranet:

Employees at all 24 locations across North America use the intranet.

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

THE INTRANET

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

Mobile approach: Responsive web design

Technology Platform: Office 365 and Bonzai Intranet

TEAM

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

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

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

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

INTRANET TEAM



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

HIGHLIGHTS ABOUT THIS WINNER

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

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

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

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

the Intranet

beauty & brains!



The new Intranet launches today

with a blend of *beauty and brains* to help make your work easier:

- Mobile-friendly, clean design
- Fresh, up-to-date content and documents provide accurate and current information
- Quick access to People Search from the footer of every page or through the new directories page accessible on the top of each page
- See only events, announcements and important dates relevant to you
- Find quick links to your most-used applications and destinations on the homepage
- Search the new document library and use filters to find what you're looking for quickly
- Filter searches by result type, modified date and author
- New marketplace classified ads let you browse and post items easily

Where'd it go?

Can't find something quickly? Stop by the intranet homepage and click on the "Where'd it go" feature for links, tips and tools, or send your frustrated feedback through the quick-access feedback form located on almost every page.

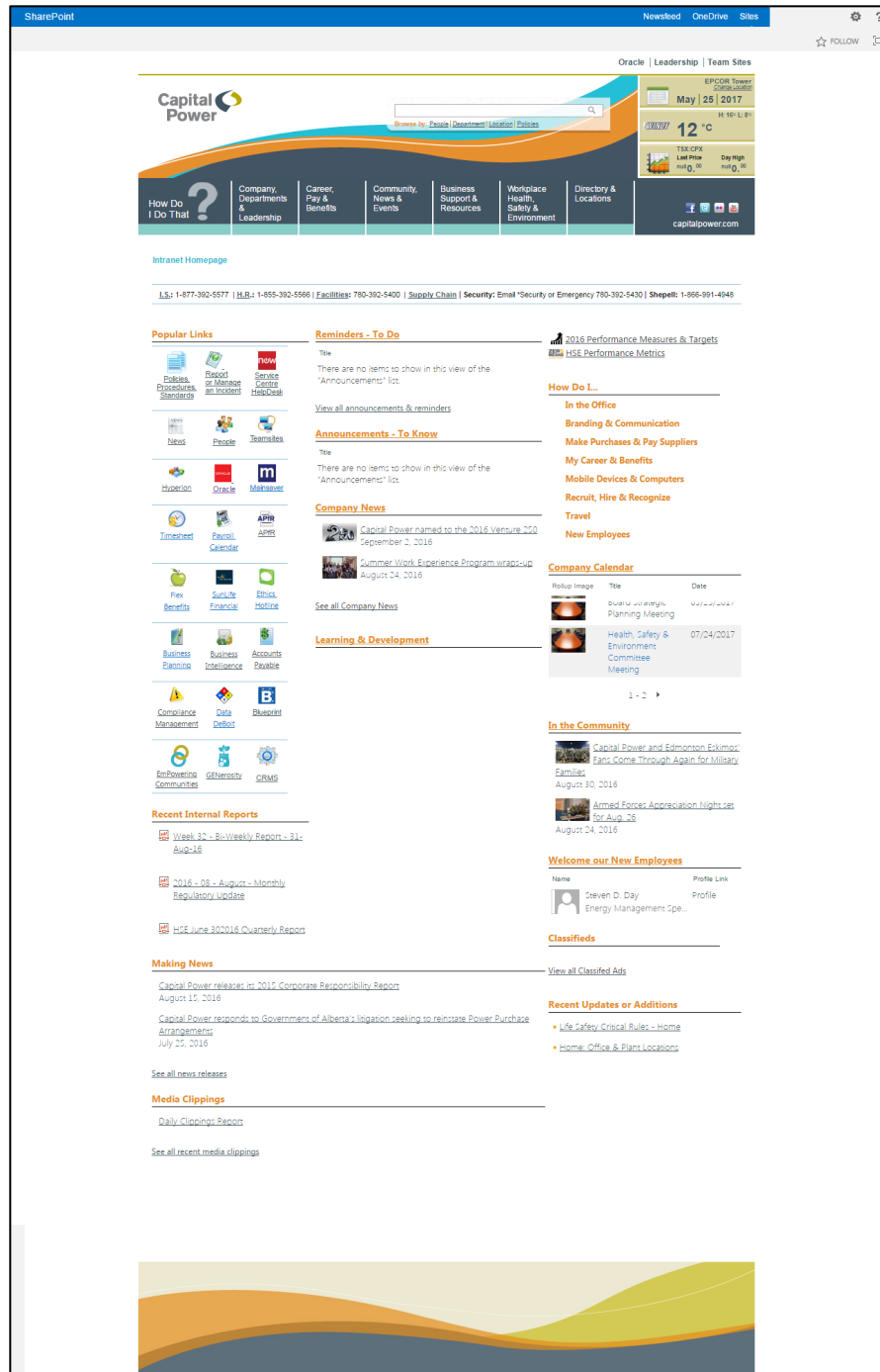
Your web browser's home tab will be set to bring you directly to the Intranet, or visit intranet.capitalpower.com

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

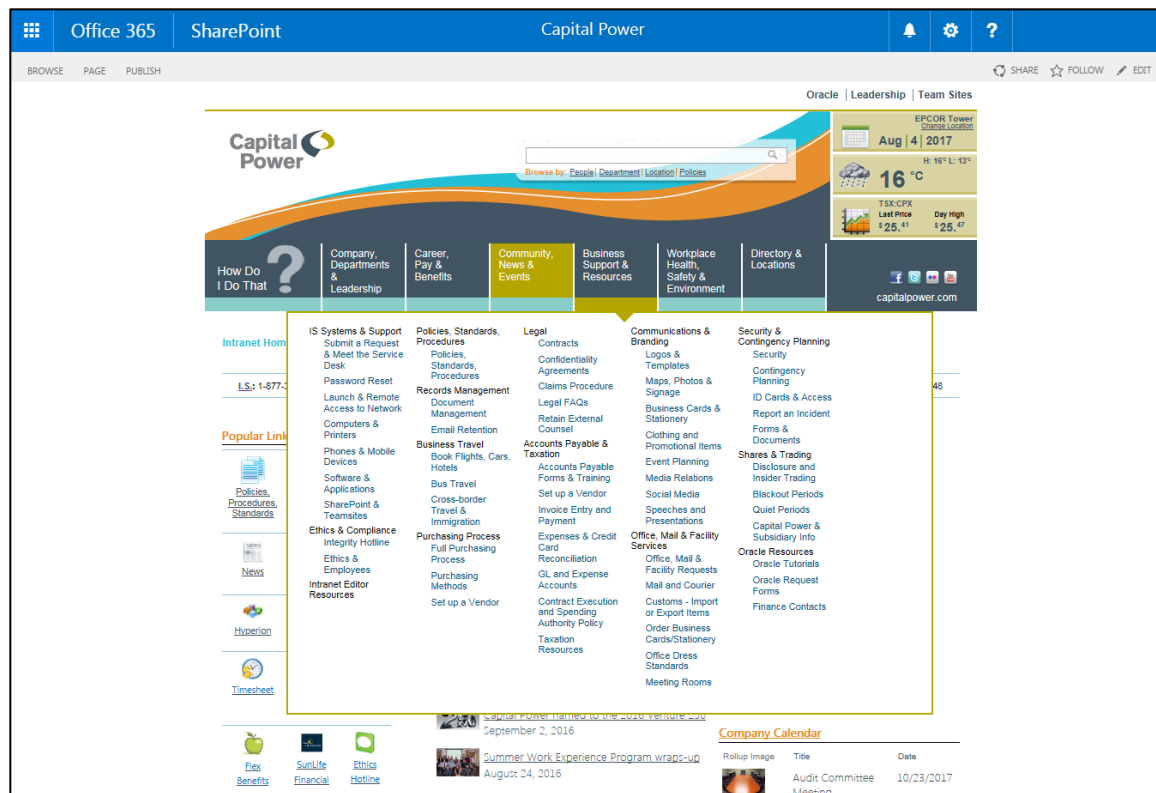
BACKGROUND

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

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



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



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

Happily Under Budget

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

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

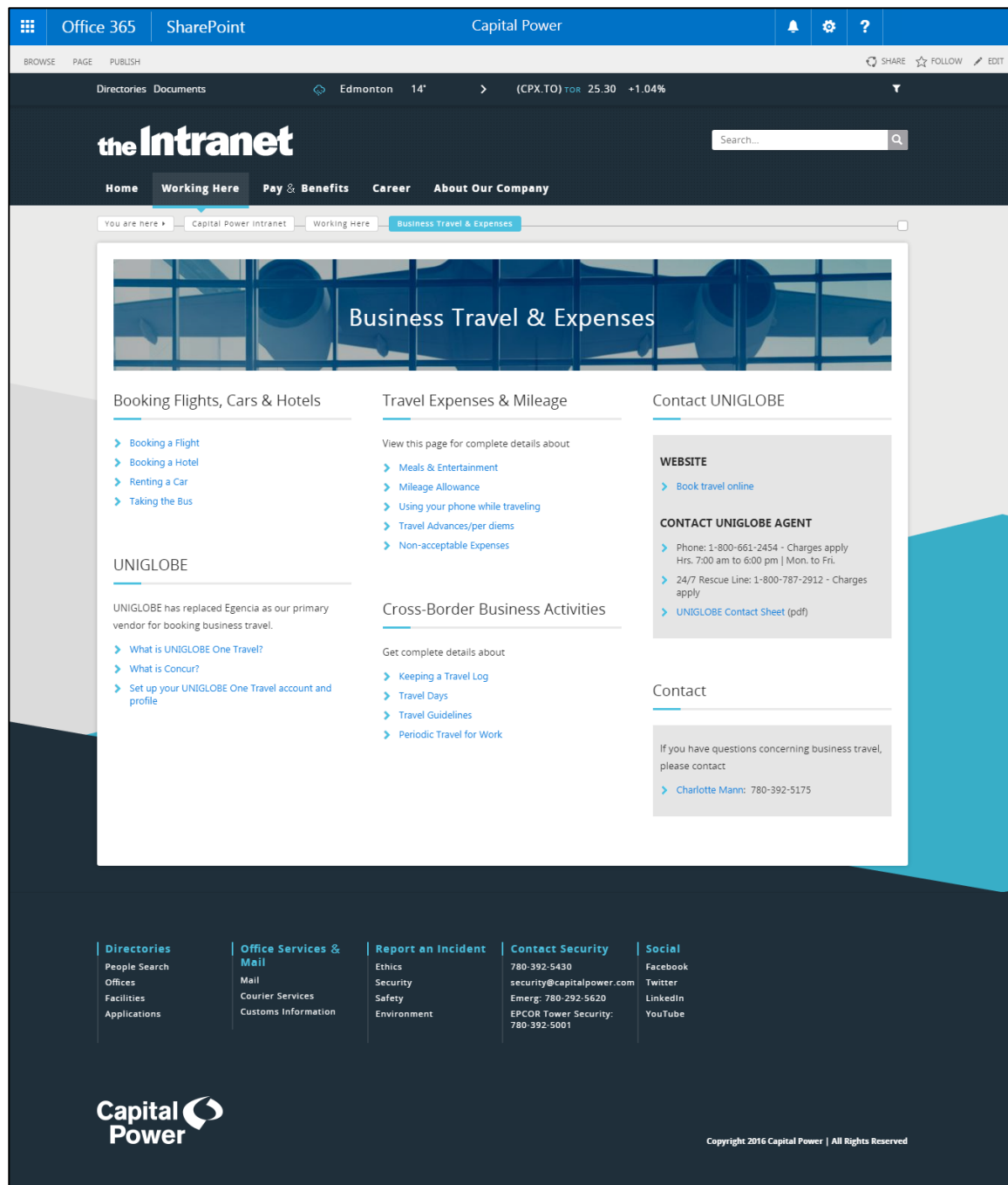
1. All display templates are responsive, which eliminated planned agency costs.
2. Out-of-the-box features met 95% of the business and functional requirements, eliminating the need for third-party custom web parts.
3. Bonzai display templates have given the team the ability to change the site's look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

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

Challenges

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

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



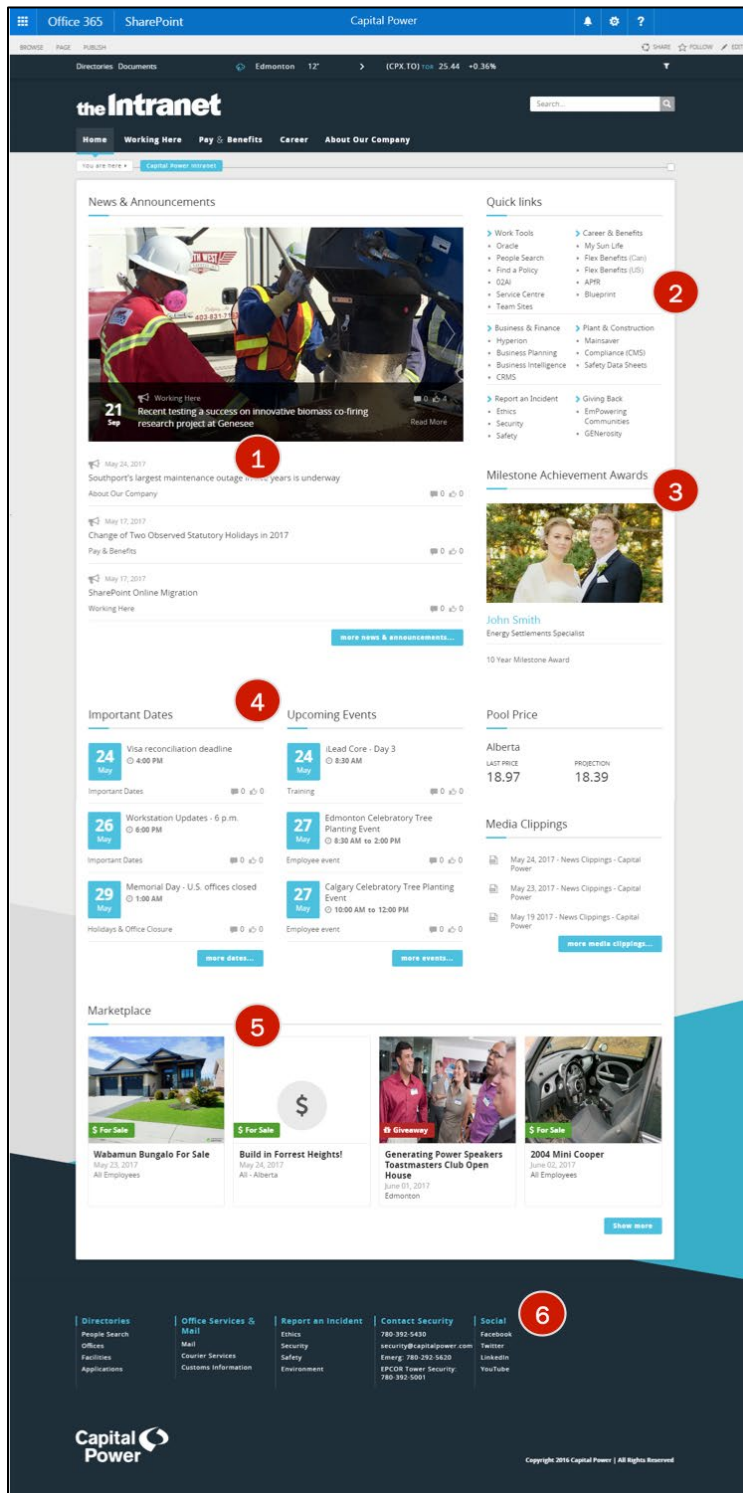
Pictured: Capital Power Intranet Navigation. This shows how navigation works in Bonzai. In most cases subsite content is typically accessible from these landing pages. With no left-navigation, users can use the breadcrumb links to return to the landing page and choose another page in the same section,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

Approach

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

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

DESIGN REVIEW



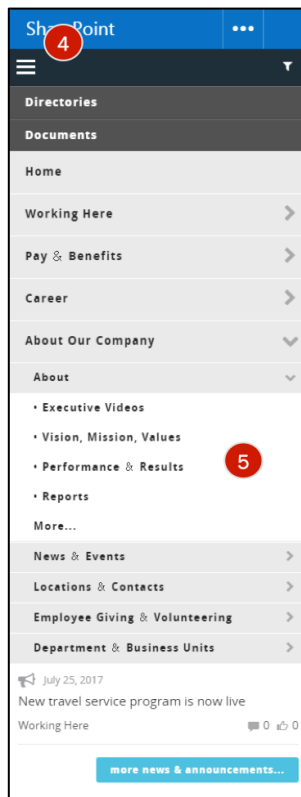
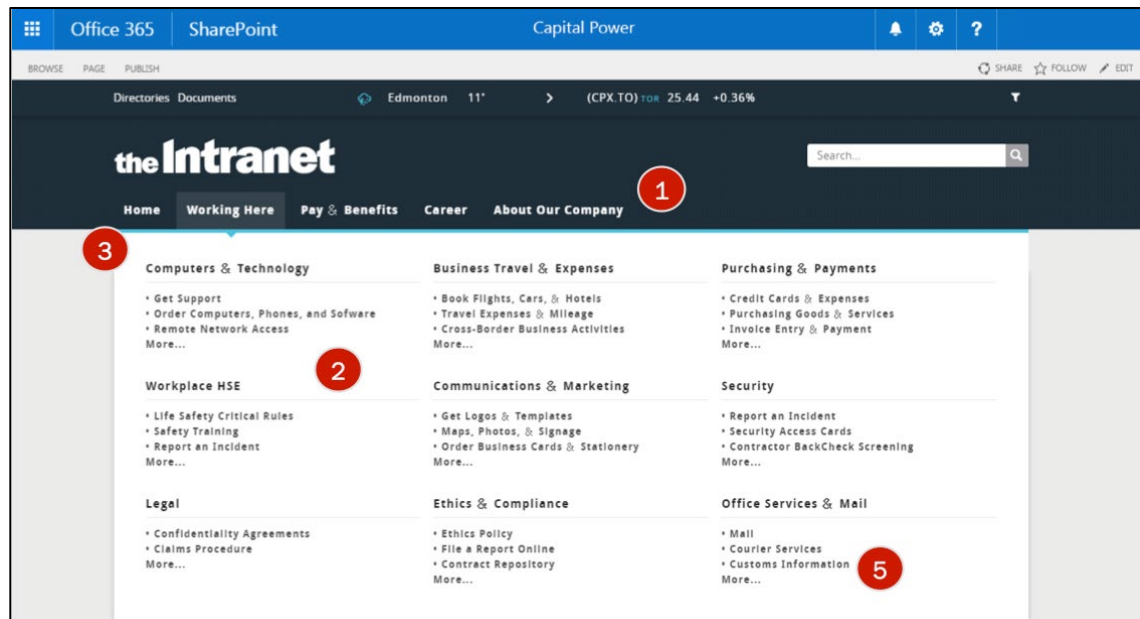
Homepage

Pictured: Capital Power Intranet Homepage. The homepage of Capital Power's site gives users quick access to updated information, essential tools, and popular content areas.

Homepage Highlights

- 1. News & Announcements.** The homepage features a news carousel that includes stories important to the entire organization. A subtle arrow on the side of the image indicates the carousel. The content's posting date is prominent, helping users identify which information has changed since their last visit. Each article includes a headline, a link to read more, and the number of comments and likes on the article. The carousel is followed by announcements, which also feature a date, headline, and number of comments and likes. Announcements are targeted based on location and role. Both news and announcements are also sent to employees via email every Wednesday.
- 2. Quick links.** The *Quick links* area leads to external tools that are essential to employees' daily work. The links provide immediate access to those applications. The team sees the site primarily as a communications tool that acts as a front door to business services and applications.
- 3. Milestone Achievement Awards.** One of the site's most-visited sections highlights employees receiving Milestone Awards, which celebrate time with the company in five-year increments. An employee-submitted picture is shown, along with the recipient's name, title, and number of years of service. A link for each recipient takes readers to the recipient's submitted profile. This section was purposefully added to the homepage with the intent of increasing engagement with the site, and the content has proven popular.
- 4. Timely information.** The lower half of the page includes *Important Dates*, *Upcoming Events*, *Pool Price*, and *Media Clippings*. Each date and event is listed with a clear date and start time. Events are targeted to employees based on role and location. *Media Clippings* are posted daily. Dates, events, and clippings all include links to additional items. When users follow a link to an event page, they can register directly from the page and see how many spots remain. Event organizers can email attendees and the event can be saved into Office calendar.
- 5. Marketplace.** The site's second most popular area is *Marketplace*, where employees can post items for sale or to give away, or publicize external events. The most recent postings are shown with an image, category (such as *For Sale* or *Giveaway*), date posted, and office location, if relevant.
- 6. Footer.** The bottom of the page lists links to key areas for information and support. These include links for directories, office services and mail, incident reporting, security, and links to the company's social media presence.

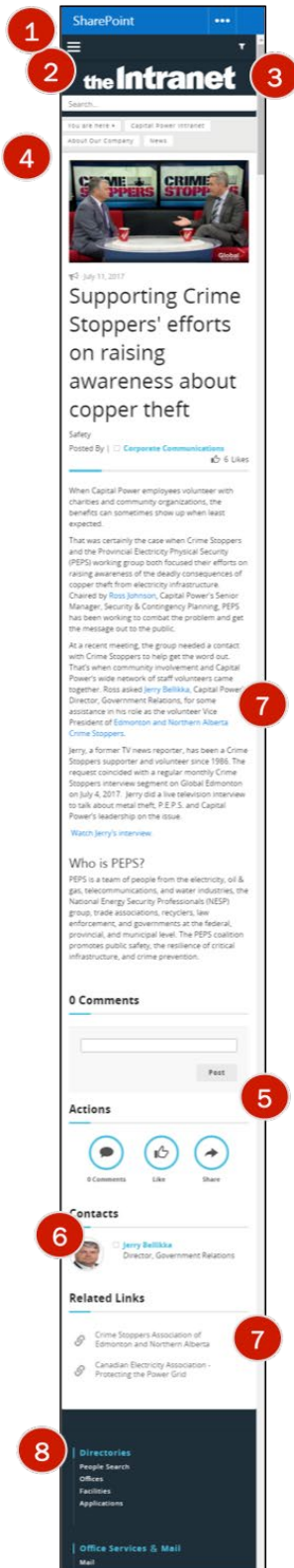
Navigation



Pictured: Capital Power Intranet Navigation.
Navigation is displayed in a megamenu on desktop and behind a hamburger menu on mobile.

Navigation Highlights

- 1. Structure.** Team members began creating an IA and navigational structure for the site before they decided to move forward with the Bonzai platform. Then, due to the platform's structure, they had to rethink the navigation to fit its capabilities. They were originally planning to have a left-hand navigation in addition to a megamenu, but the tool uses only a megamenu approach with at most three levels of content, including the homepage.
- 2. Megamenu.** The site uses a megamenu to expose additional navigation levels to the user, allowing quick access to content of interest. The megamenu doesn't show every link within a section; it includes top tasks only to help prioritize and reduce the number of links. Thus, key areas are listed, together with a *More...* link. Full links to the pages within a subsite are listed on the main landing page for each subsite.
- 3. Task-based approach.** As with many intranets, the redesign changed the site from organizing content based on department and task to using solely a task-based approach. The main navigational categories now are *Working Here*, *Pay & Benefits*, *Career*, and *About Our Company*. The team started out with seven navigational categories in the old intranet and merged them into four as a result of card sorting and tree testing with employees.
- 4. Hamburger menu.** The responsive site uses a hamburger menu to hide and expose the mobile navigation. The main categories are shown, and users can tap them to expose the subcategories beneath. Users can also tap one level deeper to see third-level links, which, like the megamenu, expose the most popular content and place the rest behind a *More...* link.
- 5. Subcategories.** The site's structure is clear in both the desktop and mobile versions. In the megamenu, secondary categories are indicated with bold type and followed by an underline, with third-level links in regular type in a bulleted list below. In the mobile design, second-level categories are indicated with indentation and a slightly smaller type size. Third-level categories are listed on a white background with bullets. This helps reinforce the site's hierarchy and helps users understand where they are in the site and in the site navigation.



Mobile Design

Pictured: Capital Power Intranet News Page — Mobile View. This shows how a news article page looks on a mobile phone.

Mobile Design Highlights

- 1. Fully responsive site.** The intranet was created using responsive design to enable the approximately 50% of users who do not sit at a desk to access the site. However, the team found out two weeks before launch that mobile users would have to use second-factor authentication; this has kept mobile usage lower than was originally hoped for.
- 2. Navigation.** The navigation is available via a hamburger menu in the site's upper left corner.
- 3. Search.** The mobile site keeps search front and center for employees, with a visible search box at the top of the page. Users can thus see and use search easily, even on a mobile device.
- 4. Breadcrumbs.** Breadcrumbs appear at the top of the page. The breadcrumbs are indicated with a *You are here* label, followed by the category, subcategory, and tertiary category in which the content appears. The labels are surrounded by a white background to make them slightly larger and a bit easier to tap on a small mobile screen. Including breadcrumbs on mobile is always a trade-off of space versus functionality. The benefit of breadcrumbs is that they help users understand their location in the site and provide quick access to higher levels in the site structure. The downside is that they push content down the page and can be difficult to tap.
- 5. Comments and actions.** The number of comments is displayed at the top of the news story, and users can add a comment at the bottom of the story, even on mobile. They can also like or share the content. So far, liking has been the most common action on the site, but commenting is growing over time. The Communications team tries to present content in a way that encourages comments.
- 6. Contacts.** Relevant contacts are listed at the bottom, with the contact's picture, title, and name. Each page has a content owner to help with review and revision.
- 7. Links.** Related links appear at the bottom of the page; links also appear within the story's text, making it easy for users to navigate to additional or related information.
- 8. Footer.** Footer links are stacked in the mobile design to make them easy to tap.

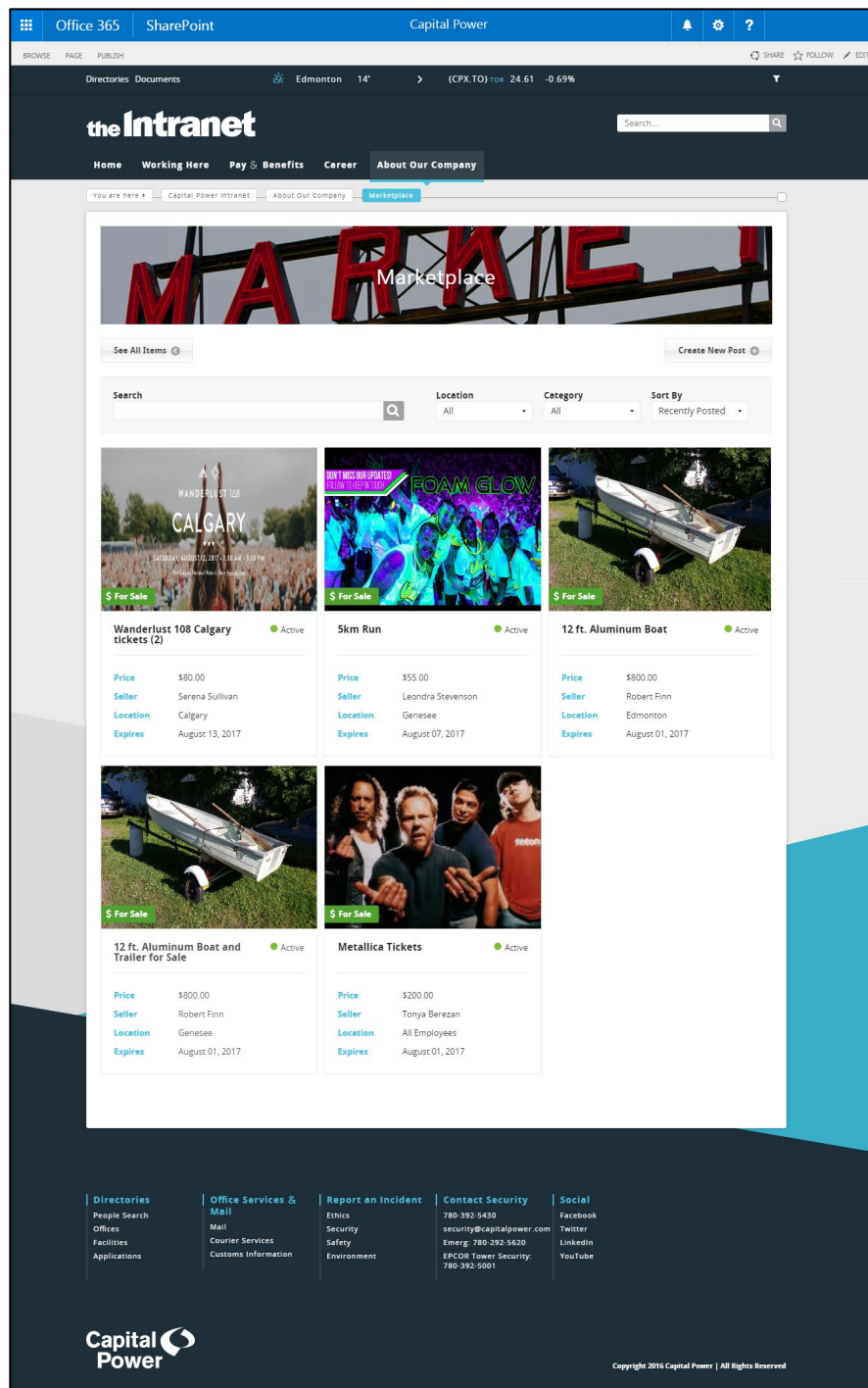
Milestone Award

The screenshot displays the Capital Power Intranet interface. At the top, there's a navigation bar with 'Office 365', 'SharePoint', and 'Capital Power'. Below this, a search bar and navigation links like 'Home', 'Working Here', 'Pay & Benefits', 'Career', and 'About Our Company' are visible. The main content area features a post titled 'John Smith - 10 Year Milestone Award' dated February 02, 2017. The post includes a photo of John Smith and his family, a description of his career at Capital Power, and a comment from Jane Smith. The footer contains various links and the Capital Power logo.

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

Milestone Award Highlights

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



Pictured: Capital Power Marketplace Landing Page. The *Marketplace* page is dynamically generated — rolling up items from a SharePoint list behind the scenes.

The screenshot shows the 'the Intranet' homepage with a 'Marketplace' section highlighted by a red circle with the number 1. The 'Marketplace' section is titled 'Marketplace' and has a 'Create New Post' button highlighted by a red circle with the number 2. Below the title is a 'Create New Posting' form with the following fields:

- Heading ***: A text input field.
- Description ***: A text area with a note: 'Please enter plain text only. Units will be converted into links.' Highlighted by a red circle with the number 3.
- Category ***: A dropdown menu with options: 'For Sale', 'Wanted', 'Giveaway', 'Services', and 'Other'. Highlighted by a red circle with the number 4.
- Price ***: A text input field with a dollar sign prefix. Highlighted by a red circle with the number 5.
- Location ***: A dropdown menu with the text 'Choose a location'. Highlighted by a red circle with the number 6.
- Expires On ***: A date input field showing '15 August, 2017'. Highlighted by a red circle with the number 7.
- Status ***: A dropdown menu with the option 'Active'. Highlighted by a red circle with the number 8.
- Seller**: A text input field showing 'Robin Morgan'. Highlighted by a red circle with the number 9.
- Photos**: A section with the text 'Please upload up to 10 images' and a 'Browse or Drop Files' button.

At the bottom of the form is a 'Post' button. The footer of the page contains links to 'Directories', 'Office Services & Mail', 'Report an Incident', 'Contact Security', and 'Social'.

Marketplace Posting

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

Marketplace Posting Highlights

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

STIP Estimator

Office 365 | SharePoint | Capital Power

Directories | Documents | Edmonton | 16° | (CPX TO) 24.61 -0.69%

the Intranet

Home | Working Here | **Pay & Benefits** | Career | About Our Company

5

you are here » Capital Power Intranet » Pay & Benefits » Canada » Pay » **STIP Estimator**

Last Update Date: July 05, 2017

STIP Estimator

1

Posted By: Corporate Communications | 1 Like

To determine your STIP target

1. Login to Oracle Self Service HR
2. Proceed to My Self Service for Employees and select My Work Information - your STIP target will be displayed in the summary information at the top of the page.

2

ENTER YOUR EMPLOYEE INFORMATION

Annualized Base Pay: Target Incentive Rate:

STIP Payment Amount: \$0 STIP Payout %: 0.0%

3

APFR BUSINESS OBJECTIVES (THE WHAT)

Result: Fully Successful

Unsatisfactory | Slightly Below Target | Fully Successful | Slightly Above Target | Outstanding

APFR PEOPLE OBJECTIVES (THE HOW)

Result: Fully Successful

Unsatisfactory | Slightly Below Target | Fully Successful | Slightly Above Target | Outstanding

4

FUNDS FROM OPERATIONS

Result: 402

Below Threshold | Sign Breach

HSE PERFORMANCE INDEX

Result: 1.04

Below Threshold | Sign Breach

Note: The estimator is set to default to the most recent year-to-date (YTD) quarterly results.

DISCLAIMER

This is an estimate only and does not actually determine your STI payout. Actual STI awards are calculated by Human Resources using final performance results and will be paid out in March, following the performance year. If there is any discrepancy between the actual award paid out in March and the award amount estimated here, the actual payout shall be considered final. Bear in mind that the estimated amount is before income tax and other deductions and is not pro-rated in cases where the employee works part-time, started with the company in mid-year or had any unpaid time away from work.

Actions

Like | Share

Contacts

John Smith
Consultant, Compensation

Related Links

STIP Objectives & Targets
Login to Oracle to determine your STIP target
View your APFR

Feedback

Was this page helpful?

Write comments here

Submit Feedback

Directories | Office Services & Mail | Report an Incident | Contact Security | Social

People Search | Ethics | 780-392-5430 | Facebook
Offices | Security | security@capitalpower.com | Twitter
Facilities | Safety | Emerg: 780-292-5430 | LinkedIn
Applications | Environment | EPCOR Tower Security: 780-392-5001 | YouTube

Capital Power

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

STIP Estimator Highlights

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

Global Site Search

The screenshot displays the Capital Power Intranet Global Search interface. At the top, the navigation bar includes 'Office 365', 'SharePoint', and 'Capital Power'. Below this, the 'the Intranet' logo is visible, along with navigation links like 'Home', 'Working Here', 'Pay & Benefits', 'Career', and 'About Our Company'. The search bar is located at the top right of the main content area, with a search button. The search results are displayed in a list format, with filters on the left for 'Result type', 'Author', and 'Modified date'. Red circles 1, 2, and 3 highlight specific elements: 1 points to the search bar, 2 points to the Author filter, and 3 points to a search result item.

Pictured: Capital Power Intranet Global Search. The global search indexes intranet content, documents, and the past 12 months of news items.

Global Site Search Highlights

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

DESIGN PROCESS AND USABILITY WORK

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

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

Information Architecture

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

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

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

Adoption and Buy-In

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

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

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

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

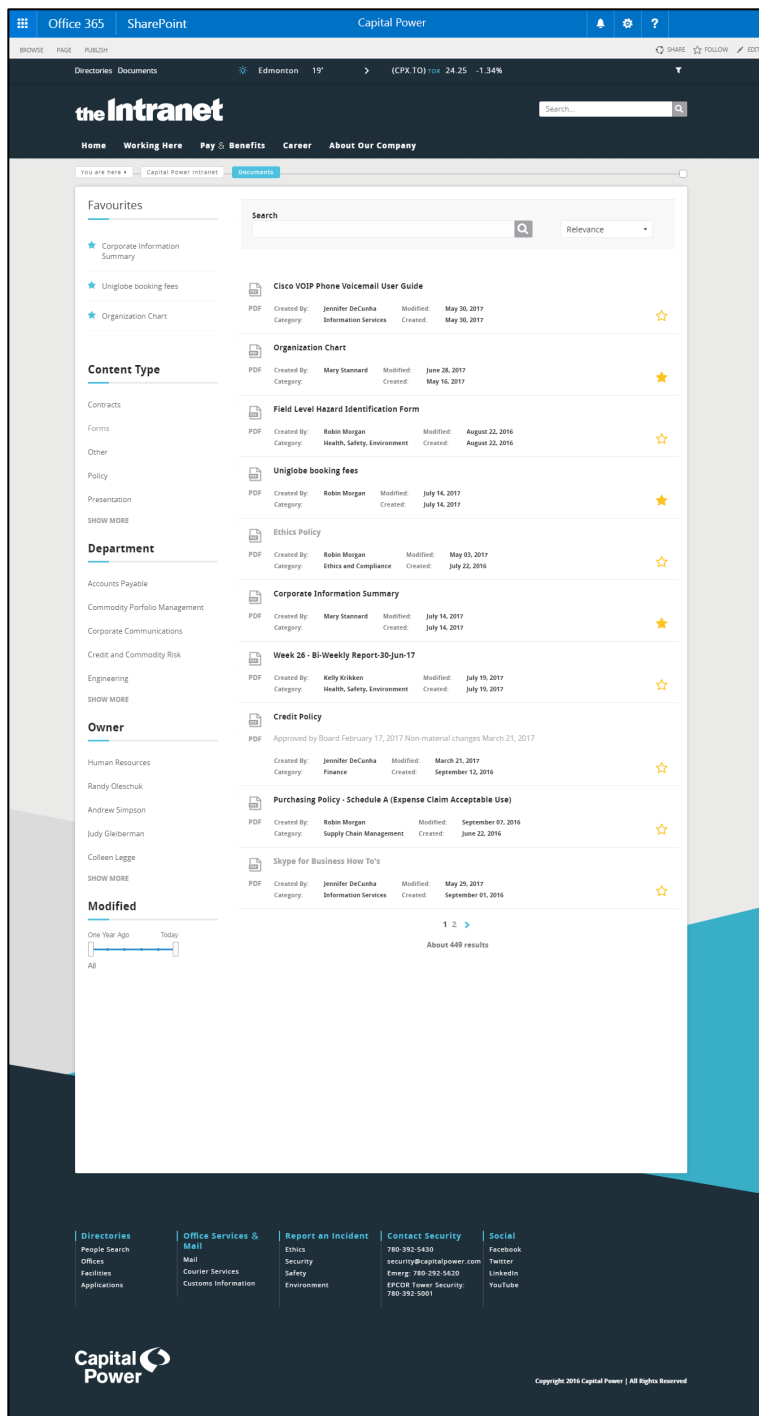
- **Month before the launch:**
 - Leading up to launch, the team sent out weekly communications about the redesign.
- **Day before the launch:**
 - Team members put up posters at all company locations that featured information about mobile access and key intranet features; they also launched a branded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

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

- The team increased the use of images to accompany new stories, and made sure the images were visible on the homepage. It also began posting news, stories, and information throughout the week to keep the homepage fresh.
- Company activities, events, educational opportunities, and so on were posted on the intranet to help ensure its relevance.

- A weekly email newsletter summarized the week's news and information that had been posted to the intranet and offered linked to those stories on the intranet.
- The team used digital signage screens to advertise the latest news, updates, discounts, deals, and other evergreen information to encourage employees to visit the intranet.

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



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

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

GOVERNANCE

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

	• Approve content prior to it being posted on the intranet • Review analytic reports provided by CC • Review content on schedule • Discuss content additions and expansions with CC • Select and oversee editors • Notify CC of changes to editors • Ensure that editors complete SharePoint basic training • Identify new content
SharePoint Support Team	• Liaise with Bonzai support • Provide SharePoint environment support • Maintain SharePoint environment • Develop SharePoint-based solutions or find SharePoint- or Bonzai-compatible solutions to business problems • Train employees on SharePoint
Bonzai Support Team	• Provide technical support and troubleshooting for Bonzai platform issues • Provide support for new releases of the software • Integrate the Core Team's feedback into future enhancements to the software

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

URL AND ACCESS

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

TIMELINE

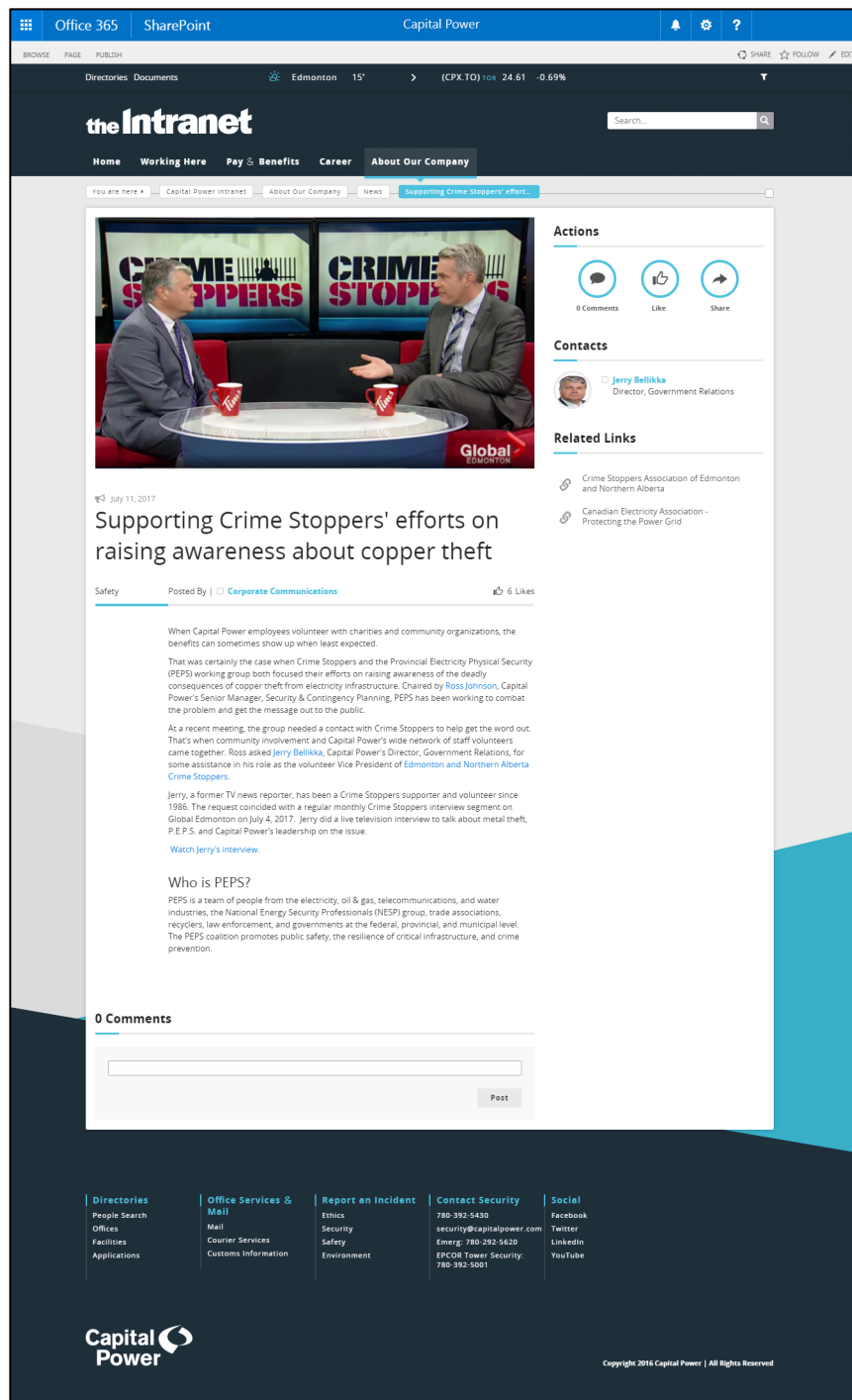
PROJECT MILESTONES	
Item	Status
July 9, 2009	Company IPO: first intranet launched on the SharePoint 2003 platform as a spin-off of the parent company's intranet
October 6, 2011	Intranet redesign project initiated
August 20, 2012	A redesigned intranet on the SharePoint 2010 platform launched
September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

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

CONTENT AND CONTENT CONTRIBUTORS

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

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



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

Office 365
SharePoint
Capital Power

BROWSE
PAGE
PUBLISH

Edmonton
16'
(CPX.TO)
24.61
-0.69%

the Intranet

Home
Working Here
Pay
Benefits
Career
About Our Company

You are here
Capital Power Intranet
About Our Company
Events
SharePoint - Managing Site Permis...

SharePoint - Managing Site Permissions

Date: August 2, 2017 2:00 PM

Training | Posted By: Corporate Communications | 0 Likes

Course Description

The SharePoint - Managing Site Permissions course is for people who are SharePoint Site Owners and would like to learn how to manage the security of a site.

This is a 1 hour hands-on course where participants actively work with SharePoint using a student demo site. This course can also be offered remotely through Skype.

Students will learn about:

- How to Access the Site's Permissions
- Change the Members Permission Level to Contribute
- Add Someone to a Group
- Remove Someone from a Group
- Create a New Group/ Remove a Group
- Check a Person's Site Permissions
- Enable Access Requests
- Approve an Access Request
- View Pending or Historical Access Requests

Documentation

Students will be using the SharePoint - Managing Site Permissions Workbook and will need to work off a printed copy during the session. Hard copies will be provided at the session just in case people haven't had a chance to print their own.

Student Site

Prior to the training session, each student will be set up with their own training site. We will email the link a day or 2 before the session.

Equipment

Each student onsite will be provided with a loaner laptop for the training. Remote students can use their regular work computer.

Will You Join Us?

☒ I Will Be There
 ☐ Cannot Go
 1 Spots Taken

Actions

Attendees

☐ Robin Morgan
Contingent Worker

Feedback

Was this page helpful?

Write comments here

Maps & Directions

0 Comments

Directories
 People Search
 Offices
 Facilities
 Applications

Office Services & Mail
 Mail
 Courier Services
 Customs Information

Report an Incident
 Ethics
 Security
 Safety
 Environment

Contact Security
 780-392-5430
 security@capitalpower.com
 Emerg: 780-292-5620
 EPCOR Tower Security: 780-392-5001

Social
 Facebook
 Twitter
 LinkedIn
 YouTube

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Pictured: Capital Power Intranet Event Post Page. Event posts let employees register for events directly from the page and see how many spaces are still available for the event.

Culling Content

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

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

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

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

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

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

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

TECHNOLOGY

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

Technology Evaluation Process

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

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

Option 1 – Use SharePoint online as the platform

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

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

Option 2 – Move the intranet off SharePoint completely

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

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

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

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

ROI

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

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

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

Measuring Hard Numbers

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

LESSONS LEARNED

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

- **Talk to security first.** "It's important to understand how external access will work for your intranet. Building a site that was responsive was a major requirement of our redesign project since close to 50% of employees have limited access to a workstation. Our Information Services team was heavily involved throughout the entire redesign process; however, our IS security team was not engaged specifically about external security access early on. Two weeks before launch, we were informed that second-factor authentication would be required to access the site outside of the network. Instantly, we knew that mobile would be highly impacted."
- **Write the communications plan at the beginning of the project.** "Communications to employees throughout, and especially at the end of a redesign project, is critical to its success. However, what typically happens is that all the planning is left until the end of the project when you are the busiest working to get your project completed on time. Detail a thorough communications plan at the onset, which simplifies communications when everyone is working double time."
- **Provide very organized documentation, data, and supporting analytics.** "When meeting with departments, spend time preparing the presentation and explanation. We began with the rationale for the project and the goals for the redesign, which explained our approach. We provided very organized reports showing which content (documents and pages) each department owned, and traffic/consumption of their content. Showing low engagement with content supported our suggestions to either remove irrelevant content or restructure so that important content would be more easily found by employees."

- **Test as much as you can.** “The new menu design was refined using iterative testing using Treejack where we tested the IA against common task completion. After the first few rounds of testing, we started to realize that solving one problem can sometimes lead to issues in other areas. Retesting weekly gave us the opportunity to continuously refine and improve the structure and naming conventions throughout the design phase of the project. My advice: test as much as you can, as often as you can throughout the planning and design phase of your project. It really doesn’t take that much time or that many people; you will quickly start to identify patterns in how employees think about the content, and you learn something new from every employee you work with.”

Best Practices

- **Include as many people as possible in the redesign process.** “As part of the redesign, we decided to rewrite all the content for the new intranet, which meant working with a lot of people at different levels of the organization and from every department. Over 175 people from across the company participated in the intranet project, providing input, updating content, and testing the structure and the site. By the time we launched the Intranet, most employees were completely up to speed with what was happening and we automatically had buy-in, because they had been involved in the process at some point during the content audit, ownership review, and editing work that was completed.”
- **If possible, simplify your governance structure.** “The old intranet site followed the typical SharePoint governance structure, where each site is owned by a department and people from that department are assigned edit and approval permissions. With the new site, we wanted to simplify governance as much as possible so that we could ensure our groups remain up-to-date. We ended up creating two editor groups (defined by the level of access required) and then applied them against the entire site. This has made it incredibly easy to keep our list of editors up-to-date — we’re only working with two lists.”
- **Measure what’s actionable.** “In addition to the typical traffic analysis reports, we’ve also begun running monthly reports for broken pages, abandoned search queries, and zero results. These reports have allowed us to continually improve the quality of the intranet. Missing pages and broken links are fixed, sometimes page titles are changed, or new pages are created on the site to reflect the search queries employees have used to find information. Since we began working through the results of these reports, we have seen a drop in problems in all areas.”
- **Stop doing more and start doing better.** “At the beginning of the project, we decided we didn’t want to introduce a lot of new features and functionality with the launch of the new site. Instead, we wanted to focus more on doing a better job with tools we already had and start to introduce additional features post launch.”

- **Make the intranet as future-proof as possible.** "During the planning stage, we focused a lot on sustainability: How do we stop the intranet from degrading over time? Here are some of the key things we focused on:
 - Update all site content and develop a process to ensure content owners and content remains up-to-date
 - Develop a process to ensure the list of editors remains up-to-date
 - Ensure search results remain relevant and helpful
 - Simplify how *News & Announcements* and *Events* function and will be displayed on the homepage."

European Bank for Reconstruction and Development (EBRD) (2019)

OVERVIEW

COMPANY

The European Bank for Reconstruction and Development (EBRD) was established to help build a new post-Cold-War era in Central and Eastern Europe. It has since played a historic role and gained unique expertise in fostering change in the region and beyond. The EBRD is committed to furthering progress toward market-oriented economies and the promotion of private and entrepreneurial initiative. This has been its guiding principle since its creation in the early 1990s; with new challenges and the welcoming of new countries to the EBRD world notwithstanding, it will continue to be its mission in the years to come.

Headquarters: London, UK

Company locations: Offices in 38 countries focused on North Africa, Europe, and Central Asia— from Morocco in the west to Mongolia in the east.

Locations where people use the intranet: Staff in all locations use the intranet.

Annual revenue: As a multilateral development bank, the key metric is investment level rather than profit. In 2017, EBRD invested 9.7 billion Euros.

THE INTRANET

Users: Approximately 3,500 people use the intranet, with approximately 70% of them based at HQ and the rest in multiple locations. Outside of London, the biggest offices are in Kiev, Cairo, and Istanbul, and they have up to 100 staff members each.

Staff uses the intranet to get news from around the organization, find information related to working at EBRD, and access third-party applications for self-service HR tasks, log IT requests, run procurement efforts, and much more.

Users roles include:

Front-line banking staff: Front-line staff who work on project finance use the intranet to access banking applications, track project statuses, and generally stay abreast of what EBRD is doing.

Economists and analysts: For these workers, the intranet is a source of knowledge sharing, providing access to regional news and data.

Administrative and support staff: These staff members do practical tasks, such as booking travel, organizing events, and finding meeting rooms.

Communications teams and departmental coordinators: These staffers use the intranet to share their work internally and inform staff about announcements and plans.

Mobile approach: Responsive web design

Technology platform: Oracle WebCenter Sites

TEAM

Communications team (internal): The EBRD Communications Department's project team consisted of two existing staff members.

Design team (external): Manifesto Digital supplied five design and UX staff, plus a project manager.

Leadership: James Bregman, Principal Manager, Digital Development (Communications); Andy Dean, Project Manager.

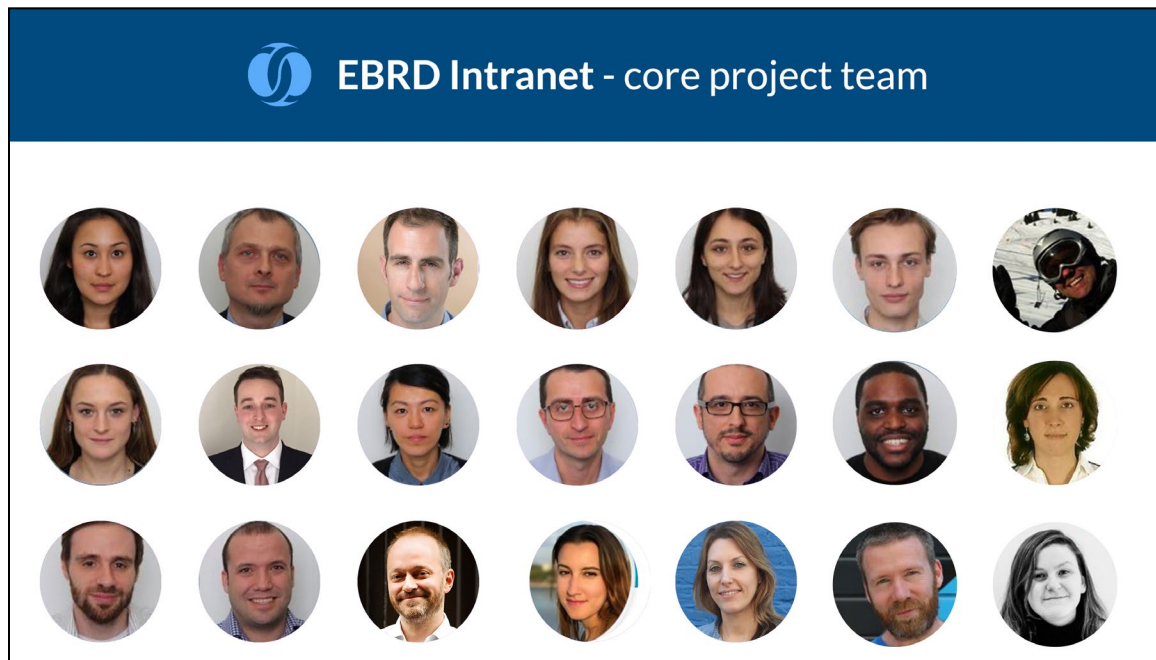
UX and design/creative services (Manifesto Digital): Richard Williams, Principal Design Consultant; Adi Harari, UX Consultant; Mark Ellis, Creative Director; Yasmin El-Amery, Designer.

Development (internal): Bojan Vukasinovic, Development Lead/WebCenter Sites developer, with support from various EBRD IT staff, including ad hoc testers, Unix managers, etc.

Development (VASS IT): Gerardo Rodriguez, Delivery Manager; Nathan Nelson, Front-end Developer; Pedro Gutierrez, WebCenter Sites Developer; Racan Osman, WebCenter Sites Developer; Noelia Alonso, Scrum Master.

Communications: Yuki Kijima, Marketing Designer; Robert Dillon, Tester and Production Temp; Dylan Bell, Intern and general all-round support; Nicole Minkova, Intern; Benedetta Maisano, Intern; Rebecca Carden, Change Management Adviser; Nigina Mirbabaeva, Digital Officer; Rosanna Vellacott, Content Coordinator (taking over from Cecilia Calatrava).

INTRANET TEAM



Team members shown here (top row, left to right—EBRD): Nigina Mirbabaeva, Bojan Vukasinovic, James Bregman, Benedetta Maisano, Nicole Minkova, Dylan Bell, Andy Dean; (middle row, left to right—EBRD): Rosanna Vellacott, Robert Dillon, Yuki Kijima, Luigi Zoso; (VASS IT): Pedro Gutierrez, Nathan Nelson, Noelia Alonso; (bottom row, left to right—VASS IT): Racan Osman, Gerardo Rodriguez; (Manifesto Digital): Rich Williams, Yasmin El-Amery, Emilie Vaillant, Mark Ellis, Adi Harari.

HIGHLIGHTS ABOUT THIS WINNER

Research, cultivating relationships, and good design sense are just a few of the traits that helped this team create a winning intranet design. EBRD intranet team members attribute much of their success to a beta period, during which they collected invaluable data about their designs—which they were able and willing to change in order to improve them. They worked closely with the head of Corporate Communications to turn the content model on its head and create a more open and distributed way of adding news, collaborative spaces, and comments on the intranet. Further, a new editorial tone and purpose focuses on having senior staff share more content with employees—and align that content with the new intranet's more open and unifying tone. Employees have warmly accepted these changes and have both generated and consumed intranet content at previously unheard of levels.

- **News written by all employees:** Any employee at EBRD can write news. This is a great way to: 1) generate a large quantity of news on a wide variety of topics, 2) include all employees, and 3) reduce the pressure on the Corporate Communications team to sniff out a variety of interesting new stories. And, while the Corporate Communications team continues to edit the homepage, other employees individually produce much of the material showcased there. A successful mark of the intranet's new, decentralized content model is that the Corporate Communications team is now perceived as a content facilitator and coordinator rather than a content owner, which lessens legacy perceptions of the intranet as a top-down, management-biased news source. Employees are the owners, which is special and different.
- **Applications list:** A page listing many applications is accessible through a link on the homepage, and users can also choose their six favorite application links to appear on the homepage itself. This makes using their most important apps a cinch.
- **Visual:** The site's consistent color palette includes light blue accent areas and backgrounds, light blue text for links, black for normal text, larger light blue text for headings, dark blue buttons for common buttons (such as for bookmarking pages), light blue buttons for demoted actions, yellow call-to-action buttons, and yellow and blue for highlighting selected navigational elements. The consistent use of color and style not only makes pages good looking, it helps create hierarchy on pages and helps users easily understand which items are clickable.
- **Social:** A Twitter account of the user's choosing (or the default, @ebrd) shows the three latest tweets on the homepage. Comment and like modules are positioned within most content items and are heavily used.
- **Personalization and customization:** The intranet tracks the content users create, along with their selected apps, selected Twitter handle to follow, bookmarks, and various other personalized information. These options help declutter the intranet and serve the best information to each user.
- **Promoted content:** A select few areas are reserved for internal advertisements; these promote interesting content or ongoing campaigns.
- **Events:** The detailed events calendar helps employees easily stay abreast of EBRD happenings.
- **Footer with help and support:** Employees can easily get help for the intranet, HR, IT, and other commonly needed areas. It's also easy to contact people in any other department for support. These offerings help prevent employees from wasting time trying to resolve unresolvable issues on their own.

- **Daily email:** The *Your ERB Today* email newsletter is sent out once a day by Internal Communications and is meant to replace many of the emails sent by various departments. The intranet team facilitated this by creating a system that pulls content directly from the CMS into an email template, making it easy to compile a variety of the day's top news items. The newsletter is an at-a-glance digest that leads staff to click into the intranet to read more. It also removes the need for multiple daily all-staff emails by consolidating key information into a single reference point.
- **Spaces:** Any employee can easily set up and share mini-collaboration tools called *Spaces*. These *Spaces* are easily findable via site search, and the *Spaces* that users are members of are saved on their profile pages. *Spaces* were created to be generic enough to be used for any work project or for running a social activity, and they make it easy for people across time zones to collaborate. In addition to members, the *Spaces* include rich components such as discussions, schedules, and documents. The *Spaces* UI is also consistent with the rest of the intranet. *Spaces* are very popular, and teams continue to request new features, which the intranet team then researches and implements.
- **Calendar:** A calendar is not just a work schedule at EBRD. Rather, the corporate calendar keeps employees involved in and informed about the thousands of events that the bank is involved in—sponsoring, hosting, and organizing—throughout the year.
- **Search:** The search includes all intranet content, including collaborative spaces. The UI offers predictive search (suggestions) and displays search results on the page as the user types, making search fast and easy. For employees who want to refine results, tabs and filters lead them forward. The *suggested keyword tags* feature is an added nicety.
- **Group sections:** Departments, regional offices, and countries each have an intranet section. Those sections communicate what they do and how they can help coworkers, and provide key contact information and more. These group sections make the large company seem a little smaller and make even far-apart workers seem a little closer.
- **Templates:** The project team thoroughly investigated and iterated template designs for many sections—including regional offices, countries, departments, and collaborative spaces—to ensure that the new platform would house all content, which was coordinated in parallel. In the template, content automatically fits in with the global navigation and site search. Within these templates, methodically researched and designed page layouts make content easy for users to digest.

BACKGROUND

The EBRD's existing intranet was ancient and in a state of disrepair. Indeed, one veteran staff member claimed that the intranet was approximately 18 years old, which seemed impossible to believe; after some internal digging, however, it was

revealed to be true. Aside from some minor facelifts to key pages in recent years, the organization's legacy intranet was almost as old as some of the staff members.

EBRD staff consistently regarded the visual design as embarrassingly outdated, functionality as limited, content authoring as slow, and the platform as constantly crashing. It was awash with terrible UX and had a baffling and messy content structure. And it was totally inaccessible on mobile.

In addition to its crumbling front end, the intranet was also hugely labor-intensive to use at even a basic level on the back end, and the CMS was outdated, user-unfriendly, and poorly configured.

Everyone agreed it was time for a new intranet, yet it was not any one of these obvious failings that finally proved to be the lynchpin that pushed the project forward. It was failing technology that finally opened the budget floodgates. The CMS that powered the old intranet had reached its end-of-life status and had to be replaced or the bank would be stuck with a dead intranet that couldn't be updated.

Goals

The top-level design goals were fairly straightforward, as an abundance of staff input had been offered by the time the project kicked off. People were calling for an intranet that would be simple, usable, and navigable. They also wanted a robust search engine and some personalization and interactivity. Those pillars became the project focus and from them the team developed a functional specification that contained approximately 20 core requirements. These requirements became the project must-haves; the remaining items were added to a backlog roadmap for consideration during further development activities post-launch.

The core requirements for the new intranet included:

- **Implement a new CMS:** Oracle WebCenter Sites had been implemented in-house a couple of years earlier to power external facing websites. Because it had been a big success, it was a no brainer to build a new intranet from scratch and use WebCenter Sites to do it.

On the legacy intranet, publishing was so painful and prone to collapse that content output was at a lower level than anyone would like; output was also geared toward a newspaper-style once-weekly release of new content. This approach put a Band-Aid on a failing system and kept it from completely failing, but it was not practical or modern. The correlations between the CMS's quality and the intranet's limitations were easy to see. Provisioning a new CMS was a central project goal, and the aim was not just to use a new CMS, but also to implement it as a leading-edge content-authoring platform that was as streamlined and user-friendly as possible.

User testing of front-end UX and design was extensive and central to the project. Considerable time was also spent working with content managers on back-end elements during development to ensure that templates and publishing processes were intuitive, reflected their needs, and minimized the number of clicks or stages in required for any given production task.

- **Make the intranet social and inclusive:** Another goal was to create an intranet that was not merely a one-directional news channel from management to staff, but an interactive, social platform in which all EBRD employees could communicate and collaborate. This would constitute a sea change: At EBRD, openness in internal communication and direct access to publishing were very new ideas.

Enacting this cultural shift became a primary consideration in the change management plans. The old intranet was thoroughly one-directional—a news source that management could use to inform staff. There was no interaction or sense of inclusivity, and that had to change completely for the project to succeed.

Further, the team determined that the new intranet needed to be perceived as a tool intended for the organization as a whole. That is, it had to stretch across many user types and a huge geographical region, rather than be focus only on the needs of a subset of corporate staff at the London headquarters.

- **Make it great, not merely good:** Any new web platform should incorporate standard, modern design conventions and responsive behaviors. However, because the long-neglected legacy intranet had inflicted such a bad UX upon staff, the project team felt compelled to go the extra mile and obsess over the UX and visual design. Throughout the design process, team members repeatedly consulted with staff members to ensure that they found the new platform easy to use. There was a feeling that having an okay design wasn't going to be enough; the team had to produce a truly outstanding, modern intranet to win people over.
- **Create a culture of continuous improvement:** The team also intended to introduce the new intranet as a starting point, rather than a finished product. This meant the team had to set the stage for a long-term roadmap that could be accommodated, both from a practical and a political perspective.

Taking an Agile approach to the project went a long way toward achieving this goal. Getting in-house stakeholders familiar with the cycles of continuous improvement that were used during the project set the stage for those that would be used post-launch. Whenever templates or features were developed, the team made a conscious effort to ask how they could be extended in the future and to avoid too much interdependence between different parts of the platform that might turn out to be constrictive later.

- **Decentralize publishing:** Another artifact of the old system was that the publishing process was so challenging and unwieldy that even staff members who had access struggled to use it. The bulk of publishing was therefore funneled through one webmaster in the Communications Department. This system was inefficient and impractical, and put limits on the amount and quality of content that could be published. For the new intranet, the target model was to decentralize almost all publishing by empowering some 80 staff members across business teams to publish and manage content directly. Even within the Communications Department, which owned the intranet, the goal was to empower numerous staff members to publish easily themselves, rather than create a dependency on a few staff members. The team felt this emphasis on decentralization would make a big difference and improve the quality and quantity of information available on the new intranet.
- **Save everyone time:** One of the primary business drivers behind the intranet project was the possibility of significant gains in user efficiency. The old intranet's search engine was basically unusable. It had not indexed new content for several years, and the existing indexing was poor; as a result, finding information generally took a very long time or ended in failure and frustration. The new site's search engine had to be modern, fast, and fit-for-purpose, and the site needed an improved IA to further facilitate speed.

The team knew that the new intranet would be judged on how well, clearly, and quickly it made information available. The time saved in basic information-seeking tasks could be extrapolated to enable huge time-savings—and therefore cost-savings—across the organization.

Challenges

The challenges the team faced included the following:

- **Timeline:** While few design teams enjoy the luxury of a leisurely timeline, the EBRD team's timeline was particularly challenging. IT stakeholders wanted the entire project wrapped up within one year of starting. Further, HR required that the intranet's first iteration be live in just three months, so that it could support a critical new staff information initiative that was scheduled to launch. Even though that first intranet release could be a basic version with limited features, the timeline still alarmed some team members and governed the way the team had to approach certain processes. Perhaps most critically, the timeline put a noticeable squeeze on the design and UX period, which was compressed as a result.
- **Staffing:** The languishing state of the old intranet justified a scant ongoing staffing investment. On the legacy site, just one part-time "webmaster" kept the intranet running so that Internal Communications staff could publish a few content items per week and departments could keep their areas updated at an absolute minimum level.

In this environment, there was no notion of product management, design development, roadmaps, or anything else. So, starting without a team was a logistical challenge—but it also turned out to be a project upside. The staffing vacuum provided an opportunity to go out and find the best possible group to work on the project from scratch.

- **Overcoming caution, cynicism, and risk concerns:** Although there had been plenty of feedback calling for interactivity, social features, and a much more inclusive and collaborative intranet, many employees were also concerned (or perhaps cynical) about the likely success of these features, even though they themselves fully supported them. Cultural challenges such as these are founded on justifiable fears and are therefore hard to overcome. For example, one worry was that the organization would build a “social intranet” with opportunities for staff interaction and it would go unused, making the new platform look empty and ridiculous. Another worry was that staff members couldn’t be trusted with the “dangerous new weapon” of self-publishing.

Weighing heavily on these cultural concerns was the fact that several years earlier, an attempt to introduce intranet message boards and chat rooms had been a bit of train wreck, from both an editorial and technical perspective. So, another attempt to introduce user-generated content had to be approached keeping in mind lessons learned from the previous, disappointing attempt.

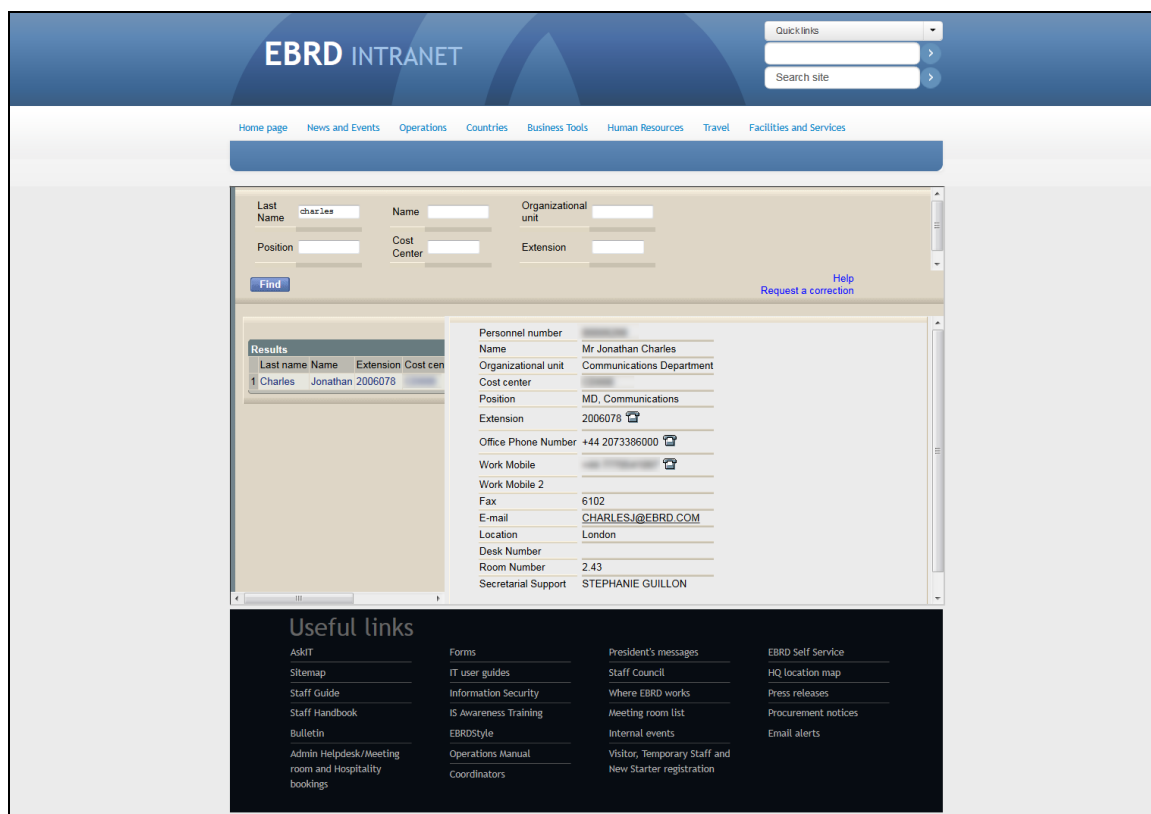
Team members took a proactive approach to quelling these justifiable fears: From the start of the project, they engaged in discussions with an array of stakeholders, including members from IT, risk management, and communications. Contingency planning was deemed an effective way to settle many things. That is, for every possible “what if” scenario, the team formed a mitigation plan. Such scenarios included: *What if someone publishes inappropriate content? What if the new collaboration functionality is used to share a sensitive document?*

When staff members saw prototypes of prospective social interactions in early user research sessions, a common response was, “I’d love to use this kind of thing, but I’d worry about my manager thinking I had too much time on my hands.” Working to overcome this concern became another project goal: Design social features that are clearly an element of core, work-related intranet functionality, and not a frivolous add-on for the sake of it.

- **Testing personalization:** Time and resource constraints meant that the CMS couldn't be configured to simulate, during testing, how the new intranet would look to a particular user. However, the team decided very early on that the new intranet would have this type of role-based personalization. It was therefore with considerable trepidation that team members committed to developing a personalized intranet without being able to truly test that personalization functionality in advance. They did however, put measures in place to mitigate this process shortcoming. For example, the development team conducted a general load-testing simulation and, while they were confident it would work, it remained a point of concern until the launch was successful and staff (thankfully) found a successfully authenticated and personalized intranet experience.

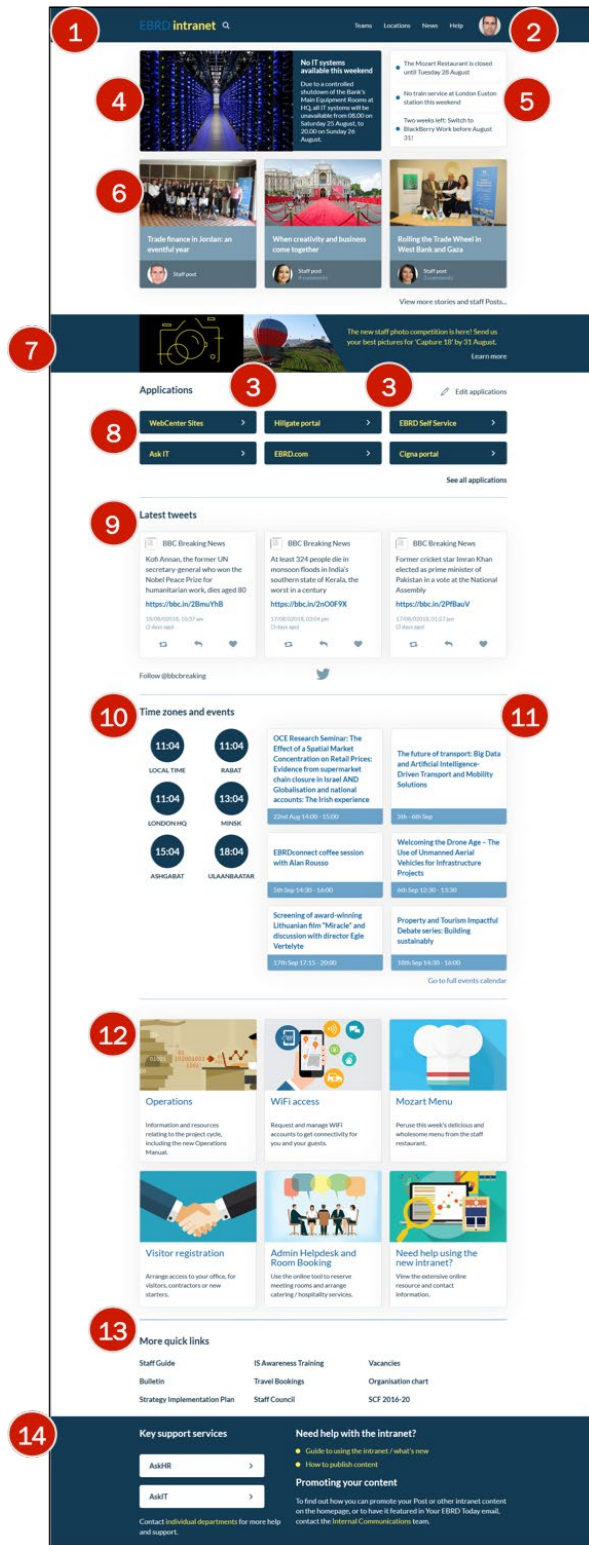


Pictured: EBRD Previous Intranet Navigation and Header. The previous intranet had several menu options, which led to landing pages with subnavigation. It was illogical, unintuitive, and repetitive. Some headings were reused as subheadings, and the journey between sections was convoluted. As a result, when using search, employees had to use a different field to find people or content pages, and each choice ran a different—and equally dysfunctional—search process.



Pictured: EBRD Previous Intranet Staff Profile. On the previous intranet, staff profiles were automatic, very basic, and could be searched based only on user name.

DESIGN REVIEW



Homepage

Pictured: EBRD Intranet Homepage. The new EBRD homepage includes news, apps, events, help, announcements, and more.

Homepage, Highlights

The homepage's visual design is pleasing and resembles the design of the bank's public-facing website, giving employees some brand consistency. News (produced by employees), announcements, and other promotions keep EBRD employees informed.

- 1. Logo and global navigation:** A thick dark blue bar at the top delineates the intranet logo, search icon, and global navigation menu. The heavy visual treatment anchors these always-present, vital items. User research helped the team select the top-level navigation options: *Teams*, *Locations* (leading to overseas office information), *News*, and *Help* (which covers both using the intranet itself and getting help from key departments, such as the IT service desk).
- 2. Logged-in user photo:** The photo indicates that the user is logged in. Clicking their photo leads users to a menu of their personal and customized information, including links to their selected top-six applications, an aggregated set of their published content, and access to various other personalization settings.
- 3. Grid:** The three-column layout and vertical grid gives the page balance and is a pleasure to gaze upon.
- 4. News:** An important recent news item created by Corporate Communications appears at the top of the homepage. An image related to the news captures attention and appears with the headline and title.
- 5. Announcements:** To the right of the main news item is a space reserved for three announcements. Urgent or unplanned announcements typically go in this area. The white background for this section shows well on the grey page background, and the blue text juxtaposed against the white background makes this section highly visible yet not distracting. Because it's important that people see these entries, this is a well-suited look.
- 6. News by employees:** Anyone can write news on the intranet. This choice makes it easy for employees to share information, generate helpful news, and create a feeling of inclusiveness. News items written by employees outside the formal Corporate Communications team are called "staff posts." Three recent items appear just below the main news item and announcements. The *View More Stories* and *Staff Posts* link leads to a page of news items.
- 7. Promoted content:** A wide, short section below the news is reserved for non-urgent information, initiatives with broad appeal, and ongoing campaigns.
- 8. Applications:** It's easy for users to locate the apps they use most, or that are most important to them. Buttons to six apps appear below the promotion section (the team's considerable user research found that six was the right number of applications to provide quick access to). The button's size makes their presence obvious. Employees choose which applications they want to appear in their

button set on the homepage using the *Edit Applications* link that appears just above the buttons. Positioning edit capabilities in the upper right is standard and makes it easy for employees to change their set of apps. While app selection can be edited in-page, some users find it more intuitive to refine that selection in the context of overall homepage customization management. So, a separate UI for reordering homepage elements also lets users manage their six preferred apps. Prior to users customizing these buttons, a default set appears based on various factors, including metrics of the most used apps, importance, newness, and apps with potential relevance for many staff members that aren't currently well known. In some cases, a new application is put into the default six temporarily to give it an initial push, before moving it further down the list. Below the buttons, a *See All Applications* link takes users to a page of approximately 50 apps that they can choose from; links to new apps are regularly added to this page, and old ones are regularly retired.

- 9. Twitter:** Employees can choose which Twitter account they want to see, and that account's three latest tweets appear on their homepage. If the user doesn't change the source, the tweets come from @ebrd, EBRD's Twitter handle. Each tweet displays the source name, the tweet and a link, its date and time, and share and like icons. Users can thus act on the tweets right from the EBRD intranet homepage. This module began life as a highly customizable news module to give staff external news at a glance from multiple sources. However, the designers eventually decided that a simple Twitter feature covered all options (as all news sources are on Twitter) and it would be a far less complex concept to implement and use.
- 10. Time zones:** Because EBRD staff work across dozens of countries and several time zones, the intranet displays a set of time zones from locations across the areas in which EBRD works. The local time appears first in the set of circles, followed by the five other time zones.
- 11. Events:** Six upcoming events appear in boxes to the right of the time zone circles. The event title, which is also a link to more details, appears first, followed by the date and time. This feature makes it more likely that employees will know about events and attend the ones they are required to or interested in. The *Go to Full Events* calendar leads to the list of all upcoming events.
- 12. Promoted tools and facilities:** The page's final large section is used to promote six popular tools and facilities, such as the *Mozart Menu* (the menu for the staff restaurant) and *Visitor Registration* to help people visiting the office.
- 13. List of links:** The *More Quick Links* section gives employees one more opportunity on the homepage to find links to the content and tools they want.

14.Footer, help, and support: The large footer at the bottom of the page offers support for HR, IT, and the intranet—the three the most commonly needed support areas. Each individual department link goes to the full list of all department pages. A contact is also clearly visible on each landing page, which helps employees find the right contact person. The footer, which appears at the bottom of every intranet page, is designed with the same dark blue background used for the global navigation at the top of pages. This makes for a polished visual design.

Homepage, Edit

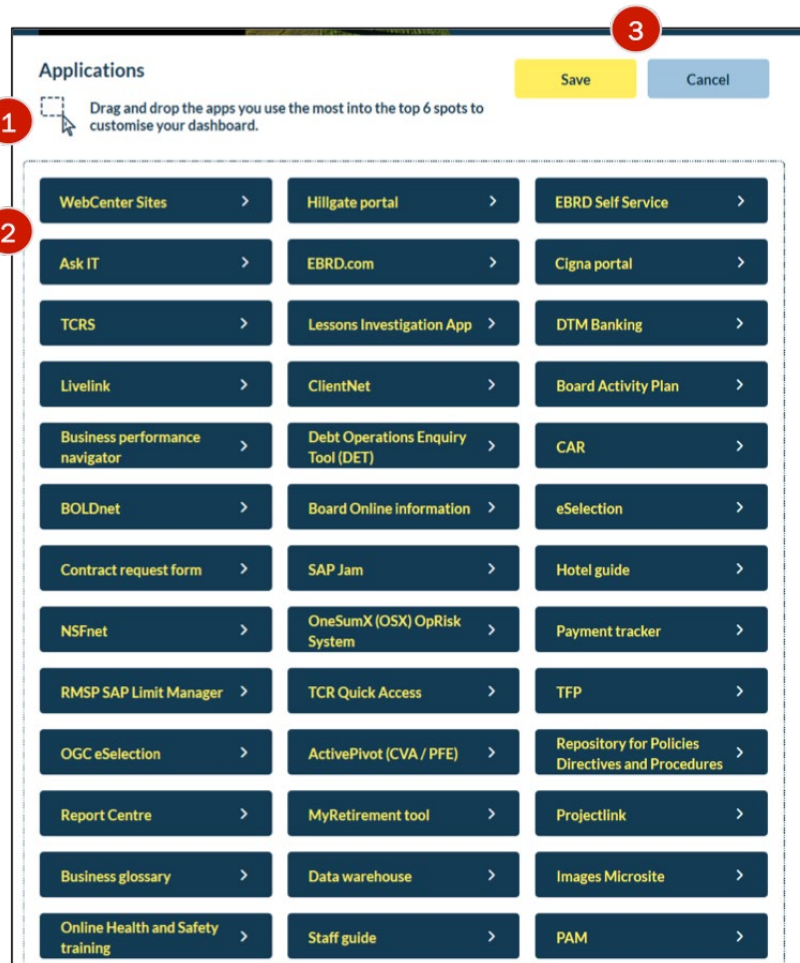
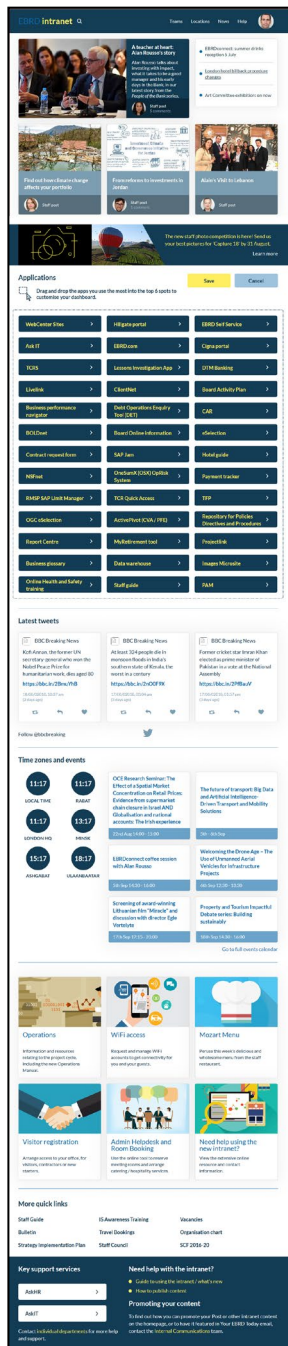
Pictured: EBRD Intranet Edit Homepage. Users can move sections of the homepage to suit their needs.

Homepage Edits, Highlights

Allowing users to reorder homepage sections helps make the intranet feel flexible and open. It also caters to the needs of the individuals that make up EBRD's diverse staff. Users access this editing dashboard through a personalized menu that appears when they click their image in the far upper right.

- 1. Instructions:** Two short sentences explain how to use the page and what it's for. While many users won't need this, it's a nice example of the handholding that makes an intranet great.
- 2. Order number:** Large numerals (1–5) appear in the left column of *My dashboard, Homepage settings* section. This indicates the vertical position of the item on the homepage.
- 3. Move buttons:** The yellow *Move up* and *Move down* buttons appear with each section on the homepage, so users can easily change their order. *Move up* is greyed out for the top choice, since it cannot move any further up, and *Move down* is greyed out for the last choice. Users can also forgo the buttons and instead drag and drop the items to the desired position.
- 4. Edit applications list:** In addition to editing their top six application buttons while on the homepage, users can edit them here using the white *Choose Application* button.
- 5. Choose Twitter source:** The white *Choose Tweet Source* button lets users choose any Twitter feed they want to follow. The source's three most recent Tweets will appear on their homepage.

Homepage, Edit Apps



Pictured: EBRD Intranet Edit Homepage Apps.
Users can drag their top six chosen apps into position.

Homepage Edit Apps, Highlights

Users drag and drop their top six apps into position, so they will appear on their homepage.

- 1. Instructions:** A clear sentence instructs users to drag and drop their top six applications to the beginning of the list.
- 2. Apps:** Each app is represented with a large blue button that is easy to grab and drag with the cursor.
- 3. Save or cancel:** Users can *Save* or *Cancel* the changes they made.

Bookmarks

My dashboard

1 **Bookmarks** Spaces Homepage settings

2 **All (14)** Pages (2) People (6) Events (0) Groups & Departments (5)

Edit bookmarks 3

Running group

Contact
Richard Pomeroy
Telephone
x6268
Email
pomeroyr@ebrd.com

Cairo Resident Office

Managing Director SEMED
Janet Heckman

Donor Visibility

Head of team / area
Lucia Sconosciuto
Telephone
0207 338 8155
Email
sconosci@ebrd.com

Multichannel output

Head of team / area
Marcus Warren
Telephone
0207 338 6753
Email
warrenm@ebrd.com

Evaluation

Head of team / area
Joe Eichenberger
Telephone
2006107
Email
eichenbj@ebrd.com

Istanbul Resident Office

Managing Director, Turkey
Aavid Tuerkner

Communications

Head of team / area
Jonathan Charles
Telephone
2006078
Email
charlesj@ebrd.com

Key support services

AskHR >
AskIT >

Need help with the intranet?

- Guide to using the intranet / what's new
- How to publish content

Promoting your content

To find out how you can promote your Post or other intranet content on the homepage, or to have it featured in Your EBRD Today email, contact the Internal Communications team.

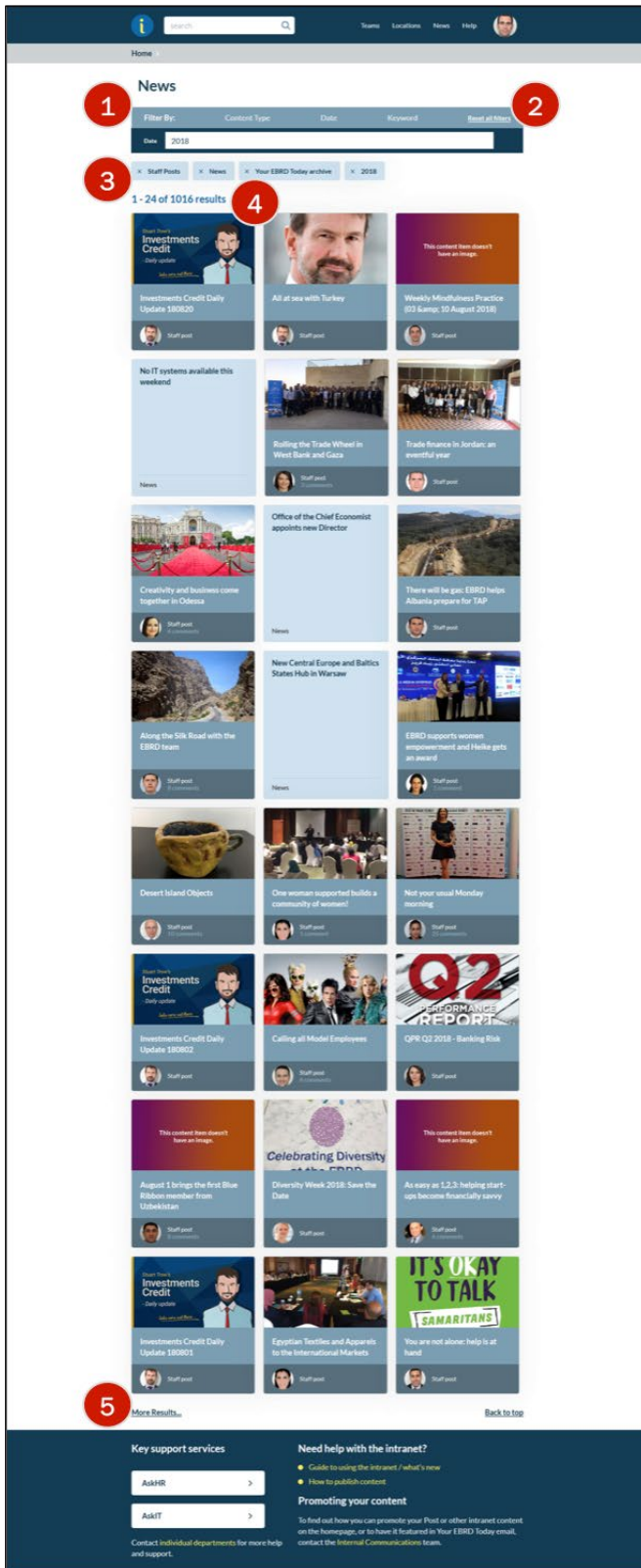
Pictured: EBRD Intranet Bookmarks. Users can access and edit their bookmarks on the *Bookmarks* tab of *My Dashboard*.

Bookmarks, Highlights

All EBRD employees have their own *Bookmarks* page where, in a bold and visual UI, cards represent the pages they have bookmarked. Users create bookmarks via a

dark blue *Bookmark page* button that appears in the upper right of most intranet pages. When a page is bookmarked, a yellow ribbon appears within the bookmark button in the upper right of pages. Clicking that button take them to their *Bookmarks* page where they can remove the bookmark if they want.

1. **Bookmarks:** The *Bookmarks* section of the *Dashboard* displays all the pages the user has bookmarked.
2. **Filter:** Employees can see their bookmarks by type—*Pages*, *People*, *Events*, and *Groups & Department*—by clicking one of the tabs at the top. A status number to the right of each item type displays how many of that type of page the user has bookmarked.
3. **Edit:** The yellow *Edit bookmarks* button in the upper right lets users change their bookmarks. The yellow button is bright, making it a good call-to-action visual juxtaposed against the blues and white on the page.



News

Pictured: EBRD Intranet News. All news is consolidated on the News page.

News, Highlights

News, whether produced by Corporate Communications or any other ERDB employee, appears on the *News* page.

- 1. Filters:** To find news they are interested in, employees can use the filters at the top of the *News* page. Among the available filters are *Content type* (such as *Staff Posts* by any employee and *News* by Corporate Communications), *Date*, and *Keywords*.
- 2. Reset:** The *Reset all filters* link in the upper right makes it easy for users to remove all filters, see all the news, and start a fresh search. Alternatively, they can click the x icon that appears with each filter to remove them one at a time.
- 3. Selected filters:** A common issue with faceted UIs is that users cannot see which ones are currently selected. That is not the case on this intranet. Here, users can easily discover and find the currently selected facets. Each word or set of words appears in a light blue button just above the news items. The large text makes the facets legible, and the blue buttons make them visible.
- 4. Results:** If it wasn't already obvious to users that the page is displaying a subset of the news, the result label provides one more hint. Large blue text states, for example, *1-24 of 1016 results*. This clearly informs users that they are looking at a subset of the news.
- 5. More:** The *More Results...* link at the bottom of the page displays the next set of results based on the current search.

Employee Article (Post)

1

2

3

5

4

6

Rolling the Trade Wheel in West Bank and Gaza

Posted 17/08/2018

Over the last few years, there has been an increase in demand for international trade to stimulate the private sector growth in the West Bank and Gaza and strengthen the export potential of local companies which cannot be sustained without an economy that is connected to the outside world. Contributing to the growth of the Palestinian financial sector as well as supporting a growth-driven private sector, the Bank launched the first "EBRD Trade Finance Information Session and Training on Advanced Bank Guarantee" in Ramallah on 27 July. Co-organised by the Bank and the Palestinian Monetary Authority, the event was attended by 77 participants from local and foreign banks operating in the West Bank and Gaza.

Link to Press Release: EBRD Supports International Trade in West Bank and Gaza

Image gallery (1 images)

TFP Line Signing with Citibank American Bank

27 Likes

Add comment

3 comments

Thank you Wad, indeed a trip to remember! very much looking forward to others.

Reply

Congratulations Karmela, Wad & team!

Reply

Thank you! we all are glad to cooperate together in EBRD.

Reply

Key support services

Need help with the intranet?

How to publish content

Promoting your content

Contact individual departments for more help and support.

1

2

3

5

4

6

Rolling the Trade Wheel in West Bank and Gaza

Posted 17/08/2018

Over the last few years, there has been an increase in demand for international trade to stimulate the private sector growth in the West Bank and Gaza and strengthen the export potential of local companies which cannot be sustained without an economy that is connected to the outside world. Contributing to

Wad Taweel
Associate Banker
West Bank & Gaza

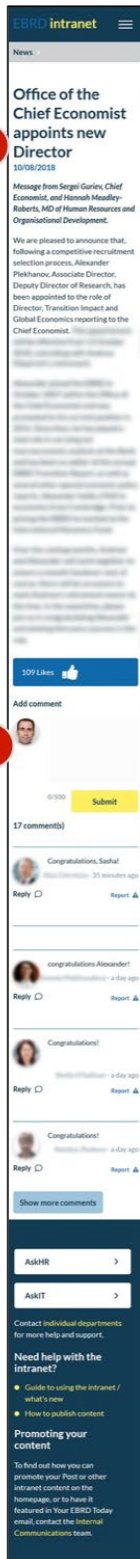
Ext. 235157
taweelw@ebrd.com
Open Jabber

Pictured: EBRD Intranet Employee Article (Post). Posts are articles written by any employee who is not part of the Corporate Communications Department.

Employee Article (Post), Highlights

In a bold move to decentralize new content, all employees are encouraged to write articles for the ERDB intranet. Articles written by employees who do not work in Corporate Communications are called *posts*. There are typically dozens of new posts each week—far more than the Corporate Communications team alone could create. Also, because the team moved the article creation UI outside the CMS, staff in the many regional offices who don't have CMS access can to publish and comment on articles.

- 1. Images:** If related photos or images are available for a post, one typically appears at the top of the article, with any additional photos or videos at the end.
- 2. Title and date:** The article's title appears in large dark letters above the body text, with the posting date just below it.
- 3. Author:** The article's author is listed in the upper right, along with the person's photo, job title, location, phone extension, and email address or instant message (via Cisco Jabber). Because any employee can post an article, it's especially important that coworkers can see the source and be able to communicate directly with that author. The *See all posts by [author]* link above the byline area lets employees further explore a particular author's thoughts and opinions. This can help forge a bond between people who have never met and extend an employee's contact network.
- 4. Comments:** Coworkers can comment and reply to articles. Commenting remains a good option for employees to communicate with one another about work and internal processes and events. Commenting on an article is positive because it lets people discuss a topic and share their knowledge about what they just read. Many senior staff and even the EBRD president have used the like button or added comments to posts, which helps diminish any perceived taboos related to employees writing and/or commenting on articles.
- 5. Report an issue:** ERDB's decentralized content model has been highly successful. Still, the team has safeguards in place in case any issues arise with a story's content. If readers find a problem with an article, they can easily report it to the intranet team via the *Report* link at the top. (So far, only one article was flagged as possibly breaking the house rules, but it ultimately turned out to be fine.)
- 6. Bookmark:** Clicking the blue *Bookmark page* button in the upper right adds the article to the logged in user's list of bookmarks.



Article, Mobile

Pictured: EBRD Intranet Mobile Articles View. Articles are streamlined for mobile access.

Article, Mobile Highlights

At the time of the new intranet's design, the mobile strategy was still forming; that, coupled with limited usage of internal systems on mobile, led the intranet team to develop as much responsive functionality as possible, while focusing on getting desktop access as good as it could be. In the end, about 75% of the intranet (excluding more complex transactions) works on mobile, and articles and posts viewed on phones look a lot like they do on desktop.

The team's creative "coping strategy" for dealing with items that are not mobile-friendly is to warn users before they hit an unfriendly mobile app. The team created introductory pages about key applications and included an explanation on those pages about how mobile-friendly (or not) an app is, along with a link to the application.

- 1. Title, date, and author:** The title, date, and author appear at the top. Some of the author information and images are omitted or condensed.
- 2. Comments:** As on desktop, comments and a comment field appear at the end of the article on mobile.

1


Your EBRD Today
 Wednesday 25 July 2018

2

What you need to know

1. The Bank is replacing Good for Enterprise with Blackberry Work. Don't forget [to update your profile](#) by the end of August.
2. The nominations period for the special election of [two new Advisors](#) for the Administrative Review Committee is now open.

3



A unified approach

A unified approach: A single results matrix piloted 30 projects under the OE&E programme is improving the quality of transition reporting. Christoph Denk shares the [lessons learned](#) from the exercise and the plans for the matrix under Project Monarch.

4

If you watch one thing

If you watch one thing: With support from the EBRD and the Global Environment Facility, Dushanbe's X-Fit Premium gym is cutting energy costs and saving 132,000 tonnes of annual CO2 emissions by installing solar panels, LED lights, and efficient chillers. [Watch our new video](#) to learn what a green gym can look like.

5

Looking ahead

View more events on the [intranet calendar](#)

Today:

[OCE seminar: Transition Report Macroeconomic Annex](#)

Upcoming:

26 July, 18.00, Boardroom: [Rethinking Economics: Employers Report](#)

5

What you have been posting

Baking success

Baking success: A small state-owned bakery in Gomel. A large commercial bank in Belarus. While the two may not have much in common, thanks to EBRD support both are now thriving businesses, [writes Renata Iskar](#).

Time for a rethink

Time for a rethink: As the Bank hosts Rethinking Economics for the launch of their Employers Report tomorrow, Alex Plekhanov invites all staff to join [the debate of the day](#): Is it time to rethink university curriculums?

5

Today's top stories

EBRD News Centre
Today's headlines:, 6 July

5

Useful links

[HQ and RO holidays](#) | [Current vacancies](#) | [Your EBRD Today archive](#) | [AskHR](#) | [AskIT](#)

View all jobs on [EBRD Jobs](#) and Success Factors

5

The Bank is pursuing a strategy that will intensify our engagement with our countries of operations, as we work to re-energise transition. Our strategic priorities are: strengthening transition impact, securing financial sustainability and creating a leaner, more effective organisation.

5

Follow the EBRD     

5

About this email

This is an internal update and should not be forwarded externally.

The daily update is produced by the [Internal Communications](#) team. Email us at today@ebrd.com to submit your content.

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Email Newsletter

Pictured: EBRD Intranet Email Newsletter. The *Your ERB Today* email newsletter is sent to all employees once a day to brief them on the day's news topics and announcements.

Email Newsletter, Highlights

To eliminate the many daily emails department were sending to all employees, the team created a system to easily compile information from the CMS into a special email template tool. The Corporate Communications team curates the content to be included in the daily email message. This message offers a simple way to remind people to check out the intranet news, while at the same time giving them a taste of some of the day's topics. Consolidating the messages into a single email eliminates frustration, clogged email inboxes, and the risk that employees (when they become inundated) will ignore the messages.

- 1. Title and date:** The newsletter title and the date appear at the top of the message.
- 2. Need to know:** The top blue section, *What you need to know*, includes urgent and somewhat urgent information. The visual treatment, title, and position at the top clue employees to the items' importance. Links lead to more information, and the words used as links are descriptive. Users scanning to the links can get a sense of what the topics are (as opposed to links with generic terms, such as *go* and *more*).
- 3. News summaries:** A few current news items produced by Corporate Communications appear next; these items are intentionally spare and include just enough information—a title, a brief summary, and an image (if applicable)—to give employees a basic idea of the news story, along with a link to the full article on the intranet.
- 4. Events:** The *Looking ahead* section shows items on the corporate calendar for the current day and the near future, along with a link to the calendar itself. These help employees stay up-to-date on relevant events.
- 5. Posts:** Articles written by employees appear in the *What you have been posting* section. In keeping with the newsletter's minimalist content theme, these entries include only a title, short description, and link to the article on the intranet.

Space

The screenshot displays the EBRD Intranet Spaces interface. At the top, a dark blue header contains a search bar, navigation links for Teams, Locations, News, and Help, and a user profile icon. The main content area is titled "Digital development updates" (1). A "Bookmark page" button (2) is in the top right. Below the title, a status message (3) reads "Private Space | Restricted permissions for managing documents and content". A link (4) says "More about Spaces and uploading documents". A tabbed interface (5) shows "Overview" (6), "Members" (7), "Discussions" (8), "Schedule", "Documents", and "Pages". A checkbox (9) for notifications is checked, with a "Learn more" link (10). The "Introduction" section (11) states the Space's purpose, with an "Edit title, image and introduction" link (12). A list of instructions follows. The "Upcoming key dates" section (13) lists a 2018 installation. The "Owner of this Space" (14) is James Bregman, with contact details. A grid of "Members of this Space" (14) shows 12 avatars. The "Latest documents" section (13) shows no uploads. The footer contains "Key support services" (AskHR, AskIT), "Need help with the intranet?" (links to guides), and "Promoting your content" (instructions on how to promote content).

Pictured: EBRD Intranet Spaces. *Spaces* makes it easy for employees in different countries and time zones to collaborate.

Spaces, Highlights

Spaces was designed to be an extremely easy-to-use collaboration tool that was nonetheless rich in features and functions. The team iterated the design many times to simplify it, making it a more desirable solution for their users than third-party commercial collaboration applications, which are more robust but also more complicated to use. *Spaces* aims to create order in collaboration in place of the disorder of fragmentation and too many third-party applications used by EBRD. Although the bank still uses third-party tools for some large-scale knowledge management activities, *Spaces* aim to be the primary platform for simple internal collaboration.

Another great benefit of the individual *Spaces* is that they are easy to find; they are included in site search and saved on their members' profile pages.

Finally, because EBRD staff work in many countries and time zones, *Spaces* provide a thoughtful, organized method for collaboration among disparate staff (and those working on cross-departmental projects).

1. **Name:** The space's name appears in large letters at the top.
2. **Bookmark:** As with articles, employees can bookmark a space to make it extra easy to find. The blue *Bookmark page* button appears consistently in the upper right of the page.
3. **Access:** If an administrator has made a space private, this status shows at the top of the page.
4. **Help:** Users can find more information about spaces and their features via the *More about Spaces* link.
5. **Overview:** The default space page is the *Overview* and is the first tab selected in the set of tabs at the top. The selected item appears in blue with bold white text that is larger than the text used for unselected tabs. This visual change for the selected item makes it easy for users to see where in the UI they are, and the topic title is sufficiently visible and informative to eliminate the need for an *Overview* title on the page.
6. **Members:** The *Members* tab displays a page listing all of the space's members. The administrator can add and remove members via this tab.
7. **Discussions:** Members discuss and collaborate on space-related topics.
8. **Schedule:** Users can share any time-related items on this page, including project milestones, targets, meetings, and events.
9. **Documents:** A robust *Documents* section allows users to post documents and make them discoverable by adding metadata. Users are encouraged to categorize documents in sections related to the appropriate theme and to tag documents with keywords.
10. **Pages:** The *Pages* section is an area open for members to create pages. Those pages can include files, such as presentations.

- 11.Introduction:** The default introduction for any space describes *Spaces* and a few of its features.
- 12.Edit introduction:** Using the *Edit title, image and introduction* link, the space owner (administrator) can easily change the introduction to tailor it more to the space.
- 13.Dates and documents:** Key upcoming dates and the latest documents posted are called out on the overview page, giving members a snapshot of recent happenings before they dig in to the space's other tabs.
- 14.Owner and members:** The space owner's card is displayed with the person's photo, name, job title, department, phone extension, email, and a link to the instant messaging tool. This makes it easy for people to request access to a space or inquire about it, or for existing members to get assistance. Member photos appear to the right of the owner, showing the richness of the community.

Space Creation

Welcome to your new Space

1 A Space is an area on the intranet where staff can collaborate, communicate and plan.
As owner of this Space, there are three steps you need to take before using it.

Step 1 of 3

3 Name your Space

4 Enter a name for your Space:

5

Step 2 of 3

3 Add some colleagues

4 Who can see and use this Space?

5 ☐ All staff
☒ Only staff that I choose to be members

Step 3 of 3

3 Choose sharing options

4 Who can add / manage calendar items, discussions, documents and pages in this Space?

5 ☒ Only me
☐ All members of the Space

6 **Save**

Pictured: EBRD Intranet Space Creation. Employees can create a new space quickly and easily.

Space Creation, Highlights

Spaces are fast and easy to create. Employees initiate the process by clicking their login photo in the upper right of pages. This reveals their personalized menu and a link to create a new space; once they click the link, they are then guided through space creation. The space will go live on the intranet almost immediately.

The space creation screen was a feature that the design team agonized over in great detail. The team knew it was absolutely critical to get this screen perfect if people were going to use *Spaces* at all. Its ease of use and simplicity were as important as the UI within the spaces themselves. The team continued to work on this tool late in the project using an external designer who hadn't seen the rest of the project. This was an unintentional but useful plus, as the designer's lack of prior knowledge positioned her well to focus solely on creating a slick, easy-to-use design.

- 1. Introduction:** A short introduction at the top of the page communicates the basic features of *Spaces*.
- 2. Numbered steps:** A wizard-like approach, complete with chronological steps, leads the space owner through the creation process. The numbers indicate the chronological steps, and the total number of steps (3) lets users know they don't have far to go to finish the set-up.
- 3. Step names:** Each step has a name that identifies what the user is doing in the process.
- 4. Labels:** Labels for the field and radio buttons are ultra-easy to understand. Roles with unusual names or branded actions don't muddy the interface. Instead, the welcome UI uses plain and natural language, with questions such as, "Who can see and use this Space?" that have clear options for answers: "All staff" and "Only staff that I choose to be members." What could be easier?
- 5. UI elements:** The text field is empty and white, making it clearly visible and easy to type in. Radio buttons are slightly oversized and easy to click.
- 6. Call to action:** The Save button call to action is positioned in the expected chronological space at the end. The yellow button stands out against the blue page background and the page's overall color palette.

Space Pages (Wiki)

Digital development updates

Private Space | Restricted permissions for managing documents and content

[More about Spaces and uploading documents](#)

Overview Members Discussions Schedule Documents **Pages**

[Edit Page](#) | [Remove Page](#)

Pages list

- Digital screens
- Intranet enhancements
- EBRD.com performance
- Video streaming
- Video provider procurement effort
- Microsites
- Chatbots
- EBRD.com enhancements

Add Page

Intranet enhancements

Overview: continue to develop intranet with new features, functionality, enhancements and fixes. Note that the below is not exhaustive - a more extensive long-term roadmap is maintained with IT.

In progress:

- New template for repository of IT evaluation reports
- Revolutionize mobile adaptability enhancements
- Homepage layout change - new generic mobile responsive search block
- Search interface enhancements
- Full-width

Recently completed:

- New page
- Pages, documents, tags and further changes within Space template

Be the first to like this

Add comment

0/500

Submit

0 comment(s)

Key support services

AskHR >

AskIT >

Contact individual departments for more help and support.

Need help with the intranet?

- Guide to using the intranet / what's new
- How to publish content

Promoting your content

To find out how you can promote your Post or other intranet content on the homepage, or to have it featured in Your EBRD Today email, contact the Internal Communications team.

Pictured: EBRD Intranet Space Pages (Wiki). Users can create webpages in the space related to the project.

Space Pages (Wiki), Highlights

The *Pages* area in *Spaces* lets members add content as web pages within their space.

- 1. Global navigation:** The *Pages* menu in the global navigation appears selected, showing which section of the space the user has entered.
- 2. Menu:** The *Pages list* area, delineated with a light blue background on the left side, acts as a secondary menu for the site's *Pages* section. Each page in the *Pages* section is listed here, and users can click the links to navigate to each associated page.
- 3. Adding pages:** At the bottom of the menu is a highly visible bright yellow *Add Page* button that matches the style of the *Spaces* template. The label itself is clear and understandable, while the button's visibility and simplicity make it obvious that members are allowed to add pages.
- 4. Content:** The content section of pages offers legible text, an appropriate text column width, and bullets—all of which make the page easy to scan or read.
- 5. Comment:** Users can easily like and comment on pages through a standard commenting UI.
- 6. Editing content:** An *Edit Page* link in the upper right makes it more likely for people to keep page content current, because it is visible and easy to access.
- 7. Removing content:** Likewise, the *Remove Page* link makes it easy for page owners to delete expired content.

Calendar

The screenshot shows the EBRD Intranet Calendar interface. At the top, there is a navigation bar with a search bar, links for Teams, Locations, News, and Help, and a user profile picture. Below the navigation bar, the 'Events' section is highlighted. A red circle with the number 1 points to the 'Show me:' filter options, which include 'Events at all locations' (selected) and 'Events only in'. Another red circle with the number 1 points to a dropdown menu. A red circle with the number 2 points to a link that says 'Got an event to publicise? Contact Communications.' On the left, a vertical calendar view shows the months from AUG to JUL, with a red circle with the number 3 pointing to the month selection and a red circle with the number 4 pointing to the selected month 'SEP'. The main calendar view shows the dates 5TH, 17TH, 19TH, and 25TH. A red circle with the number 5 points to the first event card. The event cards are as follows:

Date	Event Title	Location	Time	Event Type
5TH	EBRDconnect coffee session with Alan Rouso	United Kingdom	14:30 - 16:00	Staff only event
17TH	Screening of award-winning Lithuanian film "Miracle" and discussion with director Egle Vertelyte	London, United Kingdom	17:15 - 20:00	External event
19TH	EBRDconnect talk: Making an Impact	United Kingdom	12:30 - 13:30	Staff only event
25TH	EBRDconnect talk: Behavioural change in the workplace	United Kingdom	12:30 - 13:30	Staff only event

At the bottom, there is a dark blue footer with two sections: 'Key support services' with an 'AskHR' button, and 'Need help with the intranet?' with links to 'Guide to using the intranet / what's new' and 'How to publish content'.

Pictured: EBRD Intranet Calendar. Most employees access the EBRD corporate calendar regularly.

Calendar, Highlights

EBRD hosts, sponsors, or co-organizes thousands of events each year. Many employees are involved or interested in these events; to find them, most rely on the corporate calendar, which is accessible from a link on the homepage. A few upcoming events are pulled from the calendar to appear on the homepage.

- 1. Where:** Employees can filter calendar events by specific locations or see all locations. This lets users find local events as well as see all the events in which EBRD is participating. Radio buttons with clear language and a drop-down list of locations make it easy for users to filter events.
- 2. Create an event:** The *Contact Communications* link lets any employee add an event to the calendar and publicize it.
- 3. Month and date:** The month and date are presented in large text that is pleasing aesthetically and easy to read. The month navigation is sticky, so if users scroll through many events, they can still see the month on the left.
- 4. Selected month:** The selected month is highlighted in yellow, matching the color palette for the rest of the intranet (such as the yellow call-to-action buttons used in *Spaces*).
- 5. Event:** Each event lists the event name, location, time, and whether the event is employee-only or open to those outside EBRD. Having internal and external events on the same calendar fosters a feeling that all events are important.

Event

The screenshot shows the EBRD Intranet Events page. At the top is a dark blue header with a search bar, navigation links (Teams, Locations, News, Help), and a user profile icon. Below the header is a grey bar with the text 'Events >'. The main content area is white and features a numbered list of five items:

- 1 Welcoming the Drone Age – The Use of Unmanned Aerial Vehicles for Infrastructure Projects** (with a 'Bookmark page' button)
- 2** HQ Room 203-204
6th Sep 2018 12:30 - 13:30
Event for staff only ⓘ
United Kingdom
- 3** Save to Outlook calendar
- 4** About
Drones have multiple commercial applications, some of which go beyond basic surveillance, photography, or videos. In some industries drones are already transforming the future of work. Insurance companies are using drones to inspect damaged assets, farmers are sending them to monitor crops and collect soil data, infrastructure companies are applying them to cut down supervision and maintenance costs of asset management. The Global drone market is anticipated to reach \$ 16.7 billion by 2022.

The seminar will provide an understanding of how the landscape is evolving and what stakeholders need to take into consideration if they want to branch into current uses of unmanned aerial supervision and capture additional value.

A light lunch will be provided.
- 5** Be the first to like this ⓘ
Add comment
[User profile picture]
[Comment text box]
0/500
Submit
0 comment(s)
Bookmark page

Below the main content area is a grey bar with a calendar icon and the text 'See all events'. The footer is a dark blue bar with three sections:

- Key support services**: AskHR >, AskIT >
Contact individual departments for more help and support.
- Need help with the intranet?**:
 - Guide to using the intranet / what's new
 - How to publish content
- Promoting your content**: To find out how you can promote your Post or other intranet content on the homepage, or to have it featured in Your EBRD Today email, contact the Internal Communications team.

Pictured: EBRD Intranet Events. Each event has its own detail page that summarizes the event information and its time and location.

Event, Highlights

Event pages provide everything employees might need to know about an upcoming event.

- 1. Name:** The name of the event appears in large letters at the top of the page.
- 2. Location, date, and time:** Details of the event's location are available below the title, along with the date and time, and whether the event is public or employee-only.
- 3. Save to personal calendar:** Users interested in an event can add it to their own calendar easily by clicking the blue *Save to Outlook calendar* button.
- 4. Description:** Event details entice employees to participate.
- 5. Comments:** As with articles and in *Spaces*, users can comment on and like events. This helps users gauge interest in an event and in particular types of events.

Search Engine Results Page, (SERP)

The screenshot shows the EBRD intranet search results page. At the top, the header includes the EBRD intranet logo, navigation links for Teams, Locations, News, and Help, and a user profile icon. Below the header, a search bar contains the text 'communications'. To the right of the search bar, there are tabs for content types: All (1278), People (87), Documents and Video (380), Staff Guide (3), News (340), and Posts (199). The 'People (87)' tab is selected. On the left side, there is a 'Filter results by:' section with expandable categories: Location, Department, Specialist topic, and Cost centre. The main results area displays a list of 10 people, each with a profile picture, name, and title. The first person is Richard Porter, Director, Internal Comms & BIS, Internal Communications. The last person is Nigina Mirbabaeva, Analyst, Internal Communications, Xhunga - Internal Communications. At the bottom of the page, there are two sections: 'Key support services' with links to AskHR and AskIT, and 'Need help with the intranet?' with links to a guide and how to publish content. Below these is a section for 'Promoting your content' with instructions on how to promote content on the homepage or in the EBRD Today email.

EBRD intranet

Teams Locations News Help

Search >

1 Search for communications 2 in: 3

4 Use the tabs to narrow results by content type. Learn more about the search or contact us to send feedback.

5 All (1278) People (87) Documents and Video (380) Staff Guide (3) News (340) Posts (199)

6 Filter results by:

- Location >
- Department >
- Specialist topic >
- Cost centre >

1 - 10 of 87

7

Richard Porter
Director, Internal Comms & BIS
Internal Communications

Jonathan Charles
MD, Communications
Communications Department

Stephanie Guillon
Executive Assistant to MD Communications
Communications Department

Victoria Harding
CCT Position
Communications Department

George Krivicky
Chair of the Alumni Association
Communications Department

Tina Hoy
Executive Assistant
Communications Department

Christophe Obert
CCT Position
Communications Department

Nigina Mirbabaeva
Analyst, Internal Communications
Xhunga - Internal Communications

1 - 10 of 87

Key support services

AskHR >

AskIT >

Contact individual departments for more help and support.

Need help with the intranet?

- Guide to using the intranet / what's new
- How to publish content

Promoting your content

To find out how you can promote your Post or other intranet content on the homepage, or to have it featured in Your EBRD Today email, contact the Internal Communications team.

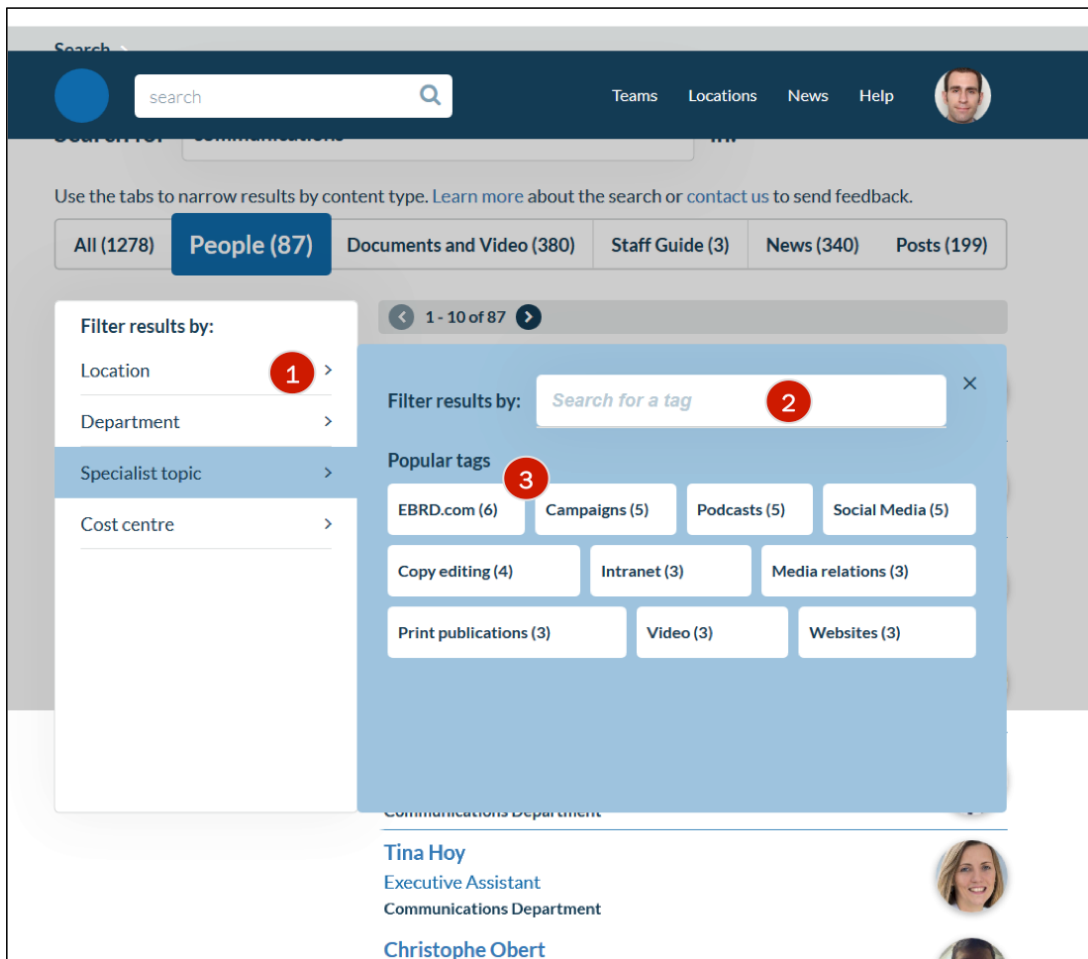
Pictured: EBRD Intranet Search Results. Search results appear as users type. Users can filter the results by various criteria.

SERP, Highlights

One of the main goals the team achieved was to make searching quick and easy, while still offering granular controls for users who need them. The team also added an interesting document-related search enhancement that provides context: A *show where used* link near each result opens a small panel that shows links to all of the pages that reference the document.

- 1. Label and field:** The *Search for* label makes it abundantly clear that the field to the right is the place to type the query.
- 2. Invoke the query:** The search (powered by Solr, the bundled search in WebCenter Sites) offers results as users type their queries. Predictive search results also drop down from the field as the user types. There is no Search or Go button to invoke the search. As with sites such as www.kayak.com, for example, fast results appear as the employee types, so buttons are not necessary.
- 3. "In":** The small but important word *in:* indicates that there are more options users can choose related to their search results. The word, followed by a colon, tells users to look below and see what is selected, and which options are available.
- 4. Type narrowing tip:** A short prompt suggests that users narrow the results by type, which is done by selecting a tab. This is a helpful (but not distracting) way to alert users to the narrowing features.
- 5. Type tabs:** The large tabs at the top of the SERP let users show results of a certain type, such as *People* or *Documents and Video*. the small number by each tab's label indicates the number of results of that type. The selected tab is indicated with a blue background, making it stand out. The default tab is *All*, which is a smart selection to start with.
- 6. Filters:** Additional filters appear on the left of the SERP.
- 7. People SERP:** When the *People* tab is selected, the results show the basic details about the people along with a photo, which is a nice touch.

SERP Filters



Pictured: EBRD Intranet SERP Filters. The suggested tags make using filters error-proof.

SERP Filters, Highlights

A menu of filters leads users to the next step as they narrow their search.

1. **Arrow:** A small arrow icon pointed right indicates that the link will expand.
2. **Field:** Users who have an idea of the tag they want to use can type it in the search field.
3. **Suggested keywords:** To make choosing a tag even easier and make users aware of popular tags, keyword suggestions are listed below the blank field. Clicking a tag will add it to the search.

1 Communications

The Communications Department promotes a positive image of the Bank by explaining its mandate, activities and role in the transition process, among target audiences both internal and external.

The Department, which includes Business Information Services, is mainly based in London, with additional staff stationed at several ROs.

2

3 Scorecard

4 Organisational Chart

Overview Structure Our media output Resources and downloads

Annual Meeting 2018: read the highlights and catch up on all related coverage

Scenes from our 27th Annual Meeting: watch the highlights

Communications Impressions from the Annual Meeting

Reading between the lines of the Bank's corporate reports

The worst and the best project I've filmed so far...

A video fit for a King?

See more news from Communications

5 Further details

If you have a need for our services or a question about any aspect of internal or external communications, don't hesitate to get in touch.

The information wizard below can help to direct you to the most relevant person or team.

What can the Communications Department help you with?

Select an option

Next Start again

6 Key contacts

Jonathan Charles
MD, Communications
Communications Department
Ext. 2006078
+44 7770541087
charlesj@ebrd.com
Open Jabber

Stephanie Gullon
Executive Assistant to MD
Communications
Communications Department
Ext. 2007591
+44 7384686591
gullons@ebrd.com
Open Jabber

Tina Hoy
Executive Assistant
Communications Department
Ext. 2008393
+44 7912127626
hoyt@ebrd.com
Open Jabber

See all people in Communications

7 Latest tweets

The EBRD
Together with the @BankofAmerica we co-organise the event "Finance, Business & Climate Resilience: Physical Climate Risks & Opportunities" on Wednesday 12 September in #SanFrancisco. @GCAS2018 #StepUp2018 #EBRDgreen
http://bit.ly/2MiyqPp
20/08/2018 10:17 am
(on hour ago)

GEFF
#Georgian Museum hotel invests in #energy efficient #refurbishment with the support of @eeu_near and #Austria
20/08/2018 09:55 am
(2 hours ago)

The EBRD
Cities are usually 3-4°C hotter than non-urban areas. How can we reduce urban heat?
18/08/2018 10:34 am
(2 days ago)

Follow @ebrd

Key support services

AskHR

AskIT

Contact individual departments for more help and support.

Need help with the intranet?

- Guide to using the intranet / what's new
- How to publish content

Promoting your content

To find out how you can promote your Post or other intranet content on the homepage, or to have it featured in Your EBRD Today email, contact the Internal Communications team.

Department

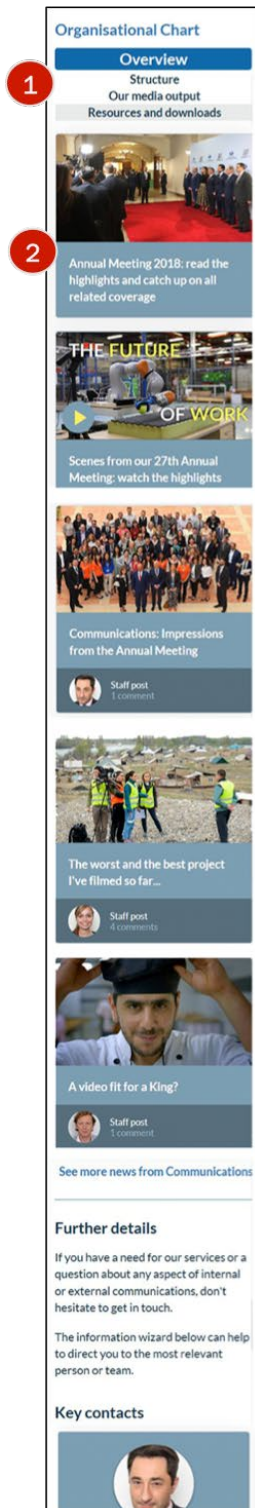
Pictured: EBRD Intranet Department Pages. All teams and groups are represented on the EBRD intranet. These sites use the *Team* template, sometimes with minor tweaks.

Department, Highlights

Like many banks, EBRD has numerous complex hierarchies of divisions, departments, groups, and subgroups. Rather than attempting to present this complex hierarchy in the intranet's menu structure, the team simplified the idea and created a *Team* template. This template is used to communicate information about any staff grouping. With a little configuration, the *Team* template can be used for a huge subdivision or a small team within a department or and anything in between. Participants in user tests understood the interface, and using this template approach helped to equalize content based on employee needs rather than organizational hierarchy.

1. **Title:** The department name appears at the top of the page.
2. **Description:** A short description acts as an introduction to the department. Reading these is a great way for employees to get acquainted with all of the EBRD teams.
3. **Org chart:** An *Organisational Chart* link leads to a hierarchical diagram that shows how the team is organized.
4. **Details tabs:** The in-page tabs lead to sections with further details about areas such as structure, media, and resources.
5. **How the team can help:** A *Further details* section describes the services that the team can provide to EBRD employees. In this example, a short wizard leads employees through a set of questions that helps them see the many benefits gained from engaging the team.
6. **Contacts:** A list of *Key contacts*—which includes the names, jobs, photos, and contact information for various department staff—appears toward the end of the page.
7. **Tweets:** The department can include Twitter feeds that it subscribes to at the bottom of the overview page.

Department, Mobile



Pictured: EBRD Intranet Department Page, Mobile View. The same information on desktop appears on mobile, reformatted to fit the smaller screen.

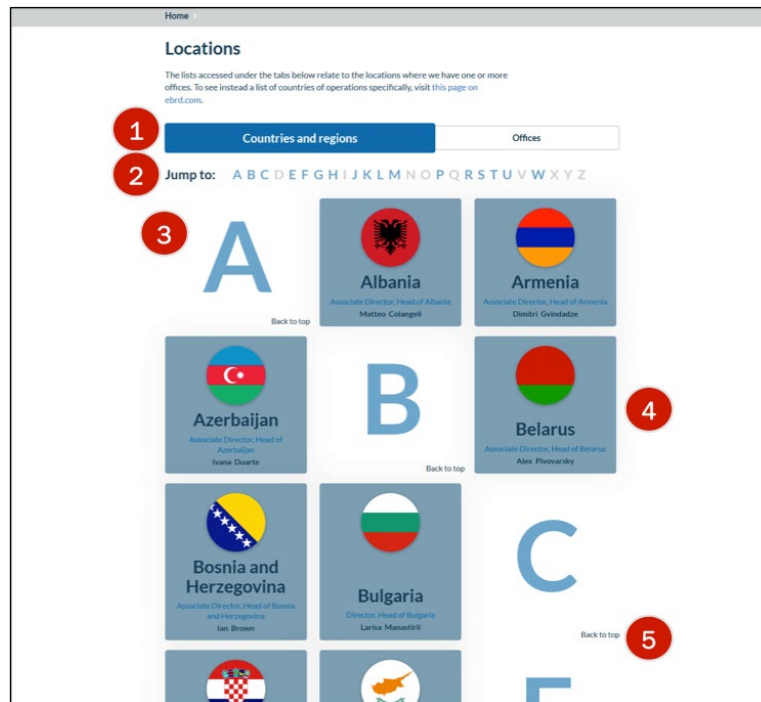
Department, Mobile Highlights

When the department page is viewed on mobile, the layout drops most of the vertical columns to display a single-column layout.

1. Vertical menu: The horizontal tabs on desktop are arranged as a list of vertical links on mobile. The background of the selected item turns blue; the other tabs display as black text on a white background.

2. Open in place: The selected button opens the related content in the current screen.

Country List



Pictured: EBRD Intranet Country List. The dozens of countries in which EBRD staff work are listed on the *Locations* page.

Country List, Highlights

EBRD staff work in many countries. Each country is represented on the intranet and can be found in the *Locations* area under the *Countries and Regions* tab.

- 1. Tabs:** Tabs at the top offer choices for viewing *Countries and Regions* or *Offices*.
- 2. Alpha list:** The list is sorted alphabetically so that users can choose a letter in the *Jump to* list of letter links at the top to go to that letter's section of the page.
- 3. Letter card:** Very large blue letters act as a signpost for the next set of countries in the list.
- 4. Country card:** Each country is represented in a blue card, which includes the country's name and flag, the manager responsible for the country or region, and his or her name.
- 5. Easy page navigation:** A small *Back to top* link appears in the bottom right of each letter card; this makes the long page easier to navigate.

Country

The screenshot displays the EBRD Intranet Country Page for Serbia. The page layout includes a top navigation bar with a search bar and links for Teams, Locations, News, and Help. The main content area is titled 'Serbia' and features a large flag image (1). To the right of the flag is a 'Key information' box (3) listing details such as the Director, Regional Head of Western Balkans, Zsuzsanna Hargitai, and the currency (RSD). Below the flag is a paragraph of text (4) stating that the Bank started operations in Serbia in 2001 and has invested €4.4 billion. A 'Useful Links' section (5) provides links to Serbia on ebrd.com, BBC Serbia profile, Legal Information, Country Strategy Delivery Review 2017, and Project Information. A 'Overview' tab (6) is selected, showing a news article about a creative initiative by E2C2, Agri and Country Teams in Belgrade. Below the article are three smaller images with captions: 'What is holding back the Western Balkans economies?', 'Spreading PPP expertise in the Western Balkans', and 'Western Balkans tour: leg 2'. A 'Current information and future events' section shows the current time (11:50), temperature (31°C), and exchange rate (1 EUR → 117.97 RSD). A 'Need help with the intranet?' section provides links to guides and a 'Promoting your content' section. At the bottom, the 'Offices in this country' section (7) lists the Belgrade Resident Office, headed by Zsuzsanna Hargitai, with contact information.

Pictured: EBRD Intranet Country Pages. Country pages include key information and are helpful for coworkers visiting that location.

Country, Highlights

Because many employees travel between countries for work, the country pages were created to help people get the lay of the land before they arrive. These pages can

also help employees who work in those countries, as well as other employees who are curious to know how and where EBRD operates so they can better understand their employer.

1. **Name:** The name of the country appears at the top of the page.
2. **Flag:** A large image representing the country's flag adds a touch of personality and a splash of patriotism to the page.
3. **Stats:** The *Key Information* section appears near the country flag and lists the highest-level managers, currency used, major language spoken, time zone, and number of regional offices.
4. **Description:** A short description summarizes EBRD's past and current work in the country.
5. **Links:** A set of useful links leads to country-related resources that visitors might not think to look for on their own.
6. **Tabbed Sections:** The page's tabbed sections include information about everything from the weather to travel, health, and security information.
7. **Offices:** Office information at the bottom of the page lists the country offices and their basic information, including address and phone number.

Office, Highlights

The regional office pages are designed for two types of users: 1) employees working in that regional office, and 2) colleagues planning a visit. The office pages resemble the country pages, but they use their own template (based on the *Team* template, but with expanded features). The team aimed for familiar UI traits, but because the team and office pages had key differences that couldn't be covered by a single template, the team created an extension. The office pages house different types of content than the country pages, and have their own personality.

- 1. Name:** The office name appears at the top.
- 2. Description:** A short summary describes the office and its mission, and often describes the city in which it resides.
- 3. Tabbed sections:** The tabbed sections include details about the office, including a mix of local news and logistical information, including key contacts, news, and documents. A link at the bottom of the *Key contacts* section leads to a list of all contacts in the country, making it easy to locate resources.
- 4. Map and location information:** A map, address, phone number, and email address make it easy to know how to contact the office.
- 5. Other offices:** A set of cards for other offices in the same country appears below.
- 6. Travel resources:** The page's final section includes specific details about getting around, such as basic location information, what to eat, and how to travel (for example, by car or by shuttle). This can help employees feel more confident and in control of their visit when they travel to the office. It can also save the company money when people are given good travel suggestions that meet EBRD requirements and guidelines.

Profile

Jonathan Charles [Bookmark page](#)

1 2 **Jonathan Charles**
MD, Communications
Communications Department

3 Ext. 2006078
charlesj@ebrd.com
Open Jabber

4 **Profile** Team Posts

About me

I run a very diverse department. I am responsible for the Bank's external and internal communications, publications and design, donor visibility, Business Information Services, the Corporate Leadership Group and a host of other activities. I love the fact that we wake up each morning trying to improve lives in our countries of operations.

Areas of expertise and interest

5 Media relations Donor visibility EBRD.com Corporate identity

[Learn more about managing your profile page](#)

Other details

6

Personnel no.	10000	Work mobile 2	
Organisation unit ID	1000000000	Fax	6102
Cost centre	100000	Secretarial support	STEPHANIE GUILLON
Work mobile 1	+44 207 338 6000	Office phone number	+44 207 338 6078

Some details can't be shown here yet but may be accessed in the old intranet until they are available in the new one

Where I am based

7

London HQ
EBRD
One Exchange Square
London EC2A 2JN
United Kingdom
Tel: 0207 338 6000
Room No 2.43

Posts

8

Almost there: India joins the EBRD
Experiencing a monsoon is an unforgettable experience. Torrential rains, strong winds and high temperatures make stepping outside a challenge at...

Annual Meeting Impressions
Sun, Sea (Died), and... sequencing. For me, they were the dominant themes of the Annual Meeting in Jordan.
It is...

Key support services

AskHR >
AskIT >

Need help with the intranet?

- [Guide to using the intranet / what's new](#)
- [How to publish content](#)

Promoting your content

To find out how you can promote your Post or other intranet content on the homepage, or to have it featured in Your EBRD Today email, contact the Internal Communications team.

Contact individual departments for more help and support.

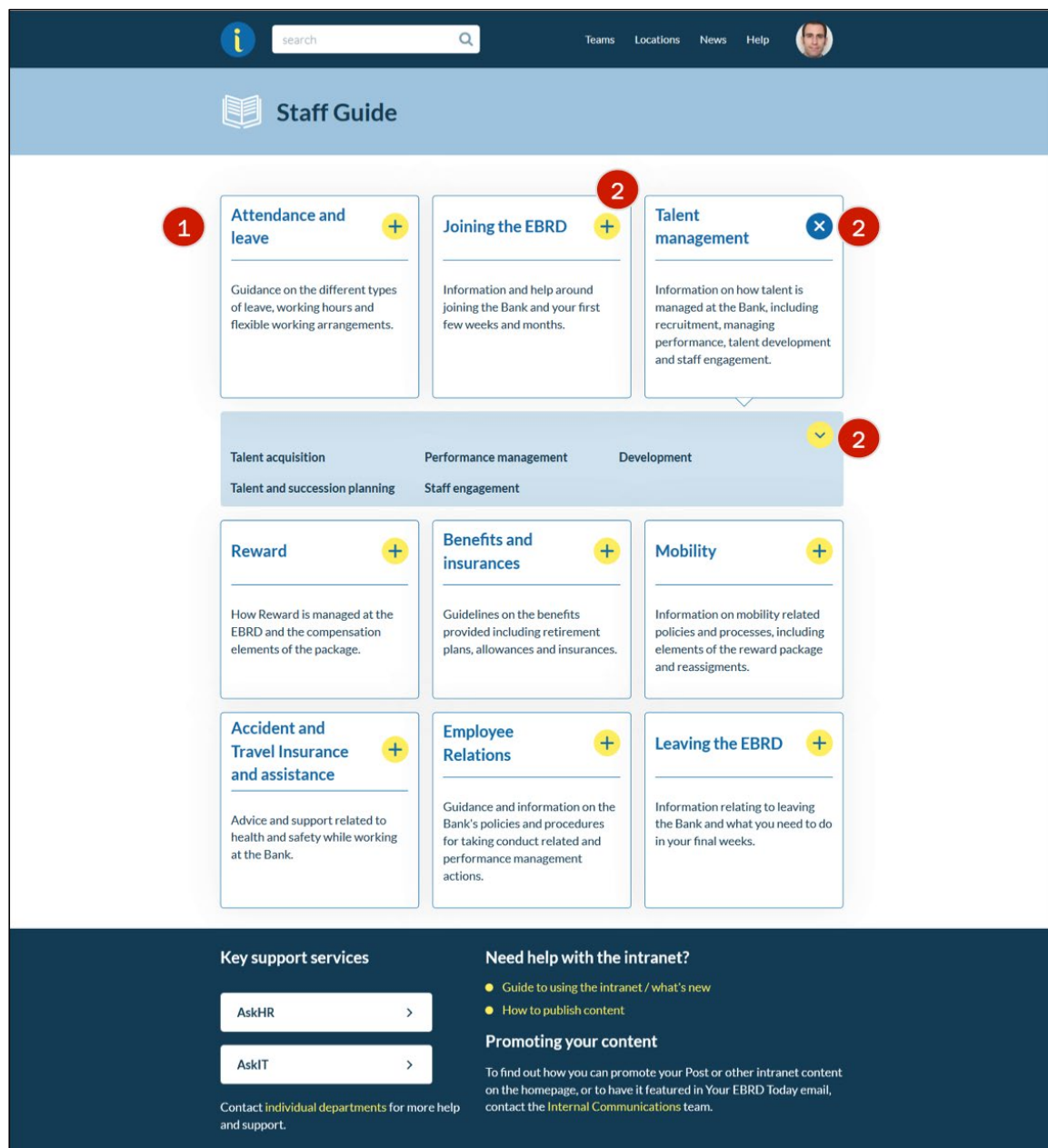
Pictured: EBRD Intranet Profile Page. Employee profile pages help employees learn about one another.

Profile, Highlights

Information in the employee profile documents includes a combination of content written by employees themselves and information extracted from SAP (which was no small feat to achieve in the format needed.) The team worked with the SAP developers to get the pages into the desired format, and the team's vigilant planning regarding profile tone and the information each would provide paid off. Other work ensured that profiles are included in the site search.

- 1. Photo:** Photos of employees personify them. They also help employees recognize each other.
- 2. Basic information:** The person's name, title, and department—the key employee information—appears with the photo.
- 3. Contact:** One of the top tasks on most intranets is to find a colleague's phone number. Thus, the employee's phone number appears at the top, followed by an email address and an instant messaging link.
- 4. Tabbed sections:** Employees can edit their own *About me* section, expressing the things they want their coworkers to know about them. Most people write a short biography. Their team information, including where they sit on the org chart, appears in the *Team* section. The *Posts* area consolidates all articles the person has written on the intranet. Users can also add links to external sources relevant to them.
- 5. Expertise:** Users can choose from a set of tags to describe their skills or areas they work on. These tags are also included in the site search so coworkers who search for a topic in an employee's keyword set will find that employee. Users can also refine results based on these tags, so an employee looking for special skills can home in on the right set of colleagues.
- 6. Details:** Other specific details, such as cost center and administrative assistant, appear in a table.
- 7. Office location:** The user's office address and a map appear next in the *Where I am based* section.
- 8. Posts samples:** Cards for three of the user's most recent posts also appear at the bottom of the profile page, providing an immediate taste of the person's work and insights.

Staff Guide



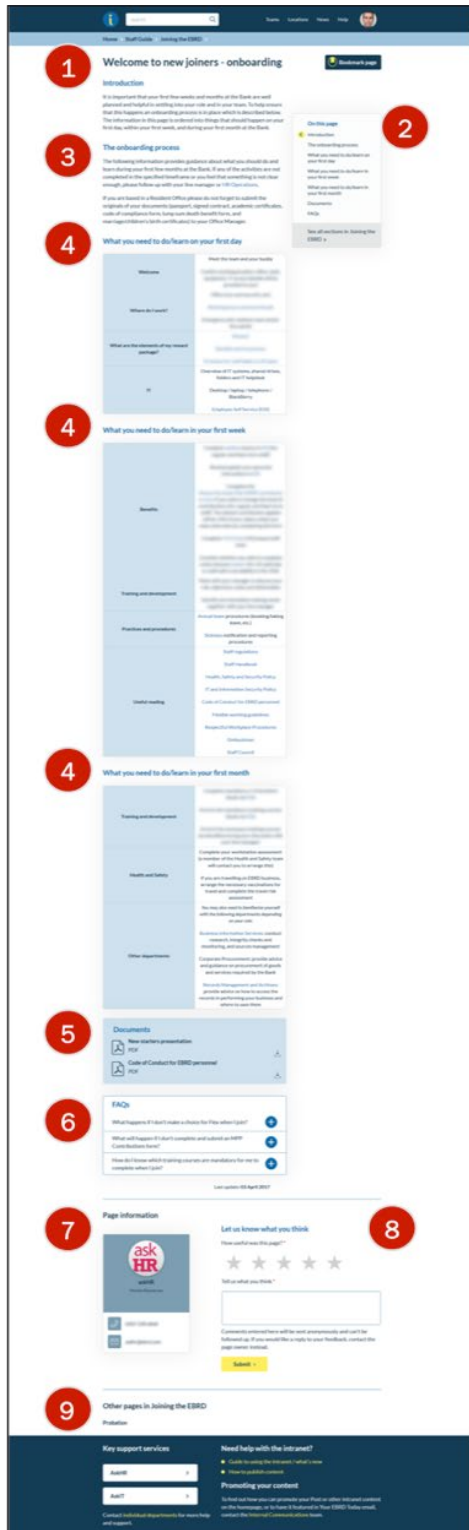
Pictured: EBRD Intranet Staff Guide. The intranet's *Staff Guide* section, which will be its own site in the future, includes all policies for EBRD employees.

Staff Guide, Highlights

The *Staff Guide* comprises a newly rewritten set of all policies, reference points, and legal information related to working at EBRD. The team was tasked with making the *Staff Guide* a self-contained site-within-a-site because the section will likely be spun off from the intranet eventually. So, while the team used a similar look and feel as the rest of the intranet so employees can move seamlessly between the apps, there

are a few areas with UI differences and unique in-page components (such as Q&A modules).

1. **Cards:** Each topic has its own simple card with a title and description.
2. **Links:** Clicking the yellow plus icon opens a blue menu of links related to the topic. The blue x icon closes the menu.



Onboarding

Pictured: EBRD Intranet Onboarding.
The onboarding section is comprehensive and highly informative for new employees.

Onboarding, Highlights

In this section, new employees can learn a huge amount about what they need to know and do during the first month of EBRD employment.

- 1. Title and introduction:** At the top of the page, new employees are offered a warm and fuzzy welcome. This sets a comforting tone and lets them know that the document will lead them through the steps they need to take to onboard.
- 2. Anchor links:** The *On this page* section in the right rail lists the subtitles for each page section. This is helpful on such a long page, and gives employees tools to manage their access to the available content based on what they need. For example, new employees who have been at EBRD for two weeks can quickly skip: *What you need to do/learn in your first week* section.
- 3. Onboarding process:** This section provides specific information about who to contact for clarification and where to submit official documents as part of their onboarding process.
- 4. Milestones:** Three basic milestones—first day, first week, and first month—are neatly broken down for employees. Each title is followed by a table with a list of steps, useful links, and details about each to-do item.
- 5. Documents:** Two documents—*New starters presentation* and *Code of Conduct for EBRD personnel*—are ready for download from the *Documents* section.
- 6. FAQ:** A few of the most frequently asked questions appear near the end of the page. Clicking the blue plus icon expands to display the answers. This is helpful for new hires who don't want to ask too many questions.
- 7. Contact info:** The *Ask HR* section on the bottom left of the page offers a phone number and email address. It's helpful to give new employees multiple options for getting answers, and the immediacy of the phone and email can prevent them from sitting too long on a question that's bothering them.
- 8. Page feedback:** Users can give feedback about the page through a star rating or by writing comments. This helps the page owners make improvements.
- 9. Related pages:** The page's last section before the footer, *Other pages in Joining the EBRD*, lists related pages in the onboarding section.

DESIGN PROCESS AND USABILITY WORK

The clock was ticking for the design team. It had to approach design and research in a way that would allow it to meet the project's pressing schedule demands—and do so without straying from best practices and conventions.

Luckily, before the project was green-lit, there was already useful data available from a staff questionnaire that had been conducted the previous year. That questionnaire asked people for their wish list for the new intranet, as well as to compare the legacy intranet to any others they'd used in previous jobs. The stories they told provided interesting insights into which features and functionality people had seen and used at other companies, and which were lacking at EBRD. This information served as a starting point.

Initial User Testing

Once funding had been approved, there was a short gap before the project could fully begin. The team therefore decided to use that small window to run some informal user tests. The goal was to get a head start, if possible, and gather some initial feedback that would prime the pump and help team members begin to generate ideas. Their hope was that the exercise would save them some time and provide some focus. In the best-case scenario, they thought the information might provide directional clues about where to steer certain features and how to prioritize others—as well as what they could rule out.

About 20 staff members were invited to participate in interviews focused on what they'd like to see in a new intranet. During these sessions, the team also gave participants very simple clickable Axure prototypes to look at that illustrated potential new features and layouts. Finally, the team led participants through existing intranet user journeys and asked for feedback.

The goal of these tests was not to dive into a granular level of detail, but rather to get a general sense of areas that might be of interest to users. Team members could then pass this information on to their agency partner, Manifesto, to serve as a jumping off point when their work commenced. The outcome from these sessions was a lot of truly valuable initial feedback.

Diving into the Details

Team members also considered specific aspects of the intranet in their research so that they could make decisions regarding how to best use intranet tools to serve the EBRD's specific needs. These needs included:

- **A customized experience:** The team investigated what people thought of having a flexible intranet that would let them configure the homepage, dashboard, and other parts to suit their preferences. Users liked this idea and specifically said they wanted tools they could use to set up quick access to their favorite applications.

- **Social:** Looking at various social approaches made it possible to see nuances that would affect their use at EBRD. Staff liked the idea of sharing and collaborating, as long as it didn't become too pervasive. They consistently indicated a strong preference for social elements sprinkled around the intranet, but did not want an intranet centered around any kind of underlying feed or other features that were similar to a typical social network. This was very useful because, at one point, EBRD had considered using something like Facebook Workplace instead of creating a new intranet—or at least as a supplement to an intranet—but all signs from testing indicated that this was not an avenue to pursue.
- **Tone:** Tone was another element that came up in the research. Social interactions were deemed useful and professional, but if they felt or looked too lightweight, some staff said that might deter them from engaging in case their managers thought it was frivolous.
- **Search:** Some unexpected things emerged from the research also—particularly around information-finding habits. When staff looked at early prototypes and were invited to give task-based feedback (e.g., “Where would you click on this page to find section XYZ?”), they consistently overlooked the search bar and focused entirely on navigating through clicks. When asked about this, they often said that because the old intranet search was essentially broken, they hadn't thought to use the search in the new prototypes. This reinforced the need for a change management effort that included basic elements such as getting staff to use internal search, as they were completely unaccustomed to doing so on the legacy site.

The various findings from these early tests were passed on to Manifesto to feed into the agency's discovery phase, and they also helped the EBRD team communicate what it was looking for from the agency.

Once the Manifesto team began working in-house, it continued to run regular user test sessions on many UI elements during development. The search interface, which was relatively complex in its mechanics but had to feel easy to use, was among those elements subjected to particularly extensive rounds of testing.

Visual Design

To meet deadlines, visual design work began in parallel with UX. Even without wireframes to hang the test designs on, however, Manifesto had started to look at color palettes and styles to get a sense of the right visual tone. Quick and informal feedback sessions were arranged so it could gather instant feedback, and the team quickly reached a level of confidence about the tone and style needed.

Next, three rounds of these research sessions were held, with about 10 staff members in each. The team changed the session format from one session to the next. Some tests were designer-lead, which let designers direct the conversation and respond to feedback instantly to share their expert perspective, while other tests were run by project staff—without designers present—so team members could urge the users to offer honest feedback without fear of offending the designers. This unconventional research approach worked, with participants offering plenty of useful and consistent feedback. Aside from some employees needing time to adjust to the

new intranet’s much larger font sizes and “big overall feel,” the design was very well received and the design schemes were finalized well before the IA and UX designs were complete.

Project Steering Group

A further useful—and unexpected—layer of UX and design input came from the project steering group, which met every 3–6 weeks. Formed to satisfy project management and governance requirements, the group also gave the team an opportunity to show designs, wireframes, and IA diagrams to yet another set of stakeholders (including some senior staff) for quick feedback. In addition to core research feedback, these demo sessions gave the team a general sense of which features would be the most impressive and accessible. Seeing this group’s reaction to specific features gave the team a clear sense of which features and functionality would be the most effective when put at the forefront of internal marketing campaigns.

Creating an IA from the Ground Up

Manifesto began with a traditional kick-off workshop for the project team, where team members discussed how to best define who the intranet was for and what it needed to do. A major card sort was conducted to determine the functions of each of the existing intranet’s different facets. This resulted in a set of approximately 20 of the most common interactions, which let the team map the existing paths that staff members used to carry out these tasks. The 80/20 rule played out heavily in the card-sort results: many user journeys, for all staff types, centered around just a few of the most-used areas and applications, particularly those related to HR self-service processes.

Because the timeline was tight and the legacy intranet didn’t have a visible structure, breadcrumbs, or a coherent menu, the team took the unconventional step of auditing it and producing a site map for reference. Next, the UX team endeavored to quickly define a drastically simplified IA for the new site and then map existing sections onto it. Because the goal was to completely revise department content—and the departments were willing to do it—it was viable to start with a framework for them to bring their content into, rather than create a framework defined by what departments had done in the past.

The bulk of intranet content would logically be static sets of information related to different departments across EBRD. However, it was also essential that the IA and UI avoid any approach that would lead to departments obsessing over their hierarchical position or any other overly specific categorization. So, the team aimed to create a system in which the intranet IA was more about page *types* than the status of the team or groups using those pages.

On the old intranet, users could be on a page and have zero sense of where they were in the site hierarchy. Although this chaotic approach made navigating the site confusing, it had an unintended benefit: the intranet structure didn’t fall into the classic trap of being hinged on the organizational structure of the bank itself.

For the new intranet, initial research indicated that staff was happy with that free-form approach as long as the content was findable, but at the same time, some kind of basic structure was needed.

EBRD has many complex hierarchies, including divisions, departments, groups, and subgroups, but the new intranet aimed to equalize them and present content based on need rather than for its own sake. For example, some high-level divisions didn't need a substantial page of content about them at all, while some small teams-within-teams-within-teams still had practical relevance for all staff and thus merited their own section.

So the preferred approach the team decided upon—and showed to test groups to confirm that the logic was appealing—was to simply have a *Team* template, which referred to any staff grouping. With only slight configuration changes, the *Team* format can cover anything from a huge subdivision of the organization to a small team within a department or a cross-departmental initiative—or even a social group. This kept UIs simpler and more consistent, and proved completely workable. Also, controls within the CMS would add definition to the correct type of content represented by each use of the *Team* page.

Such controls are useful in the A–Z index template, which aggregates *Team* pages and offers filtering by team type—including tabs for *Departments*, which covers departments of all sizes; *Initiatives and committees*, which covers staff outside of work groups, cross-departmental projects, staff networks, and so forth; and *Social Groups*, which accommodates staff-run sports and interest groups.

When it came to positioning content from EBRD's overseas Resident Offices (ROs), it was clear that the team format couldn't be stretched enough to cover RO requirements. User research had made it clear that RO pages had to offer a mix of local news updates and logistical information about that office. Thus, a custom template was needed to serve both types of staff: RO staff, who want to see what's going on; and other colleagues who want information about traveling to or engaging with ROs. These are two very different types of interactions that need to be available through a single interface.

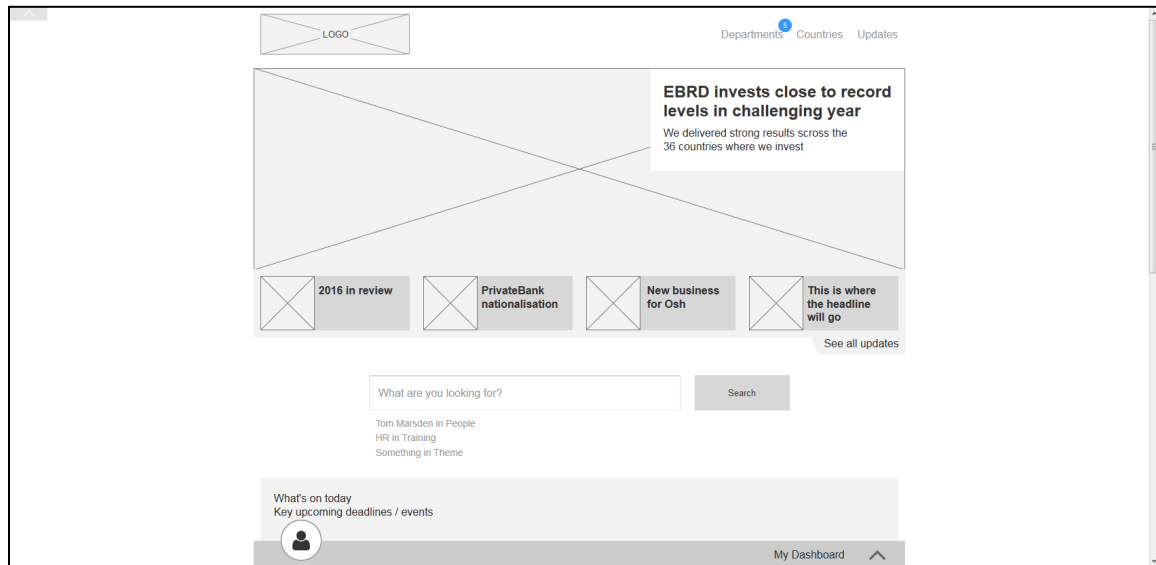
Navigation Menu Approach

The project team sought a navigation approach that would achieve three key goals: allow for a simple set of options to facilitate tidiness and a stress-free UX; be well suited to optimize mobile access; and put more emphasis on search.

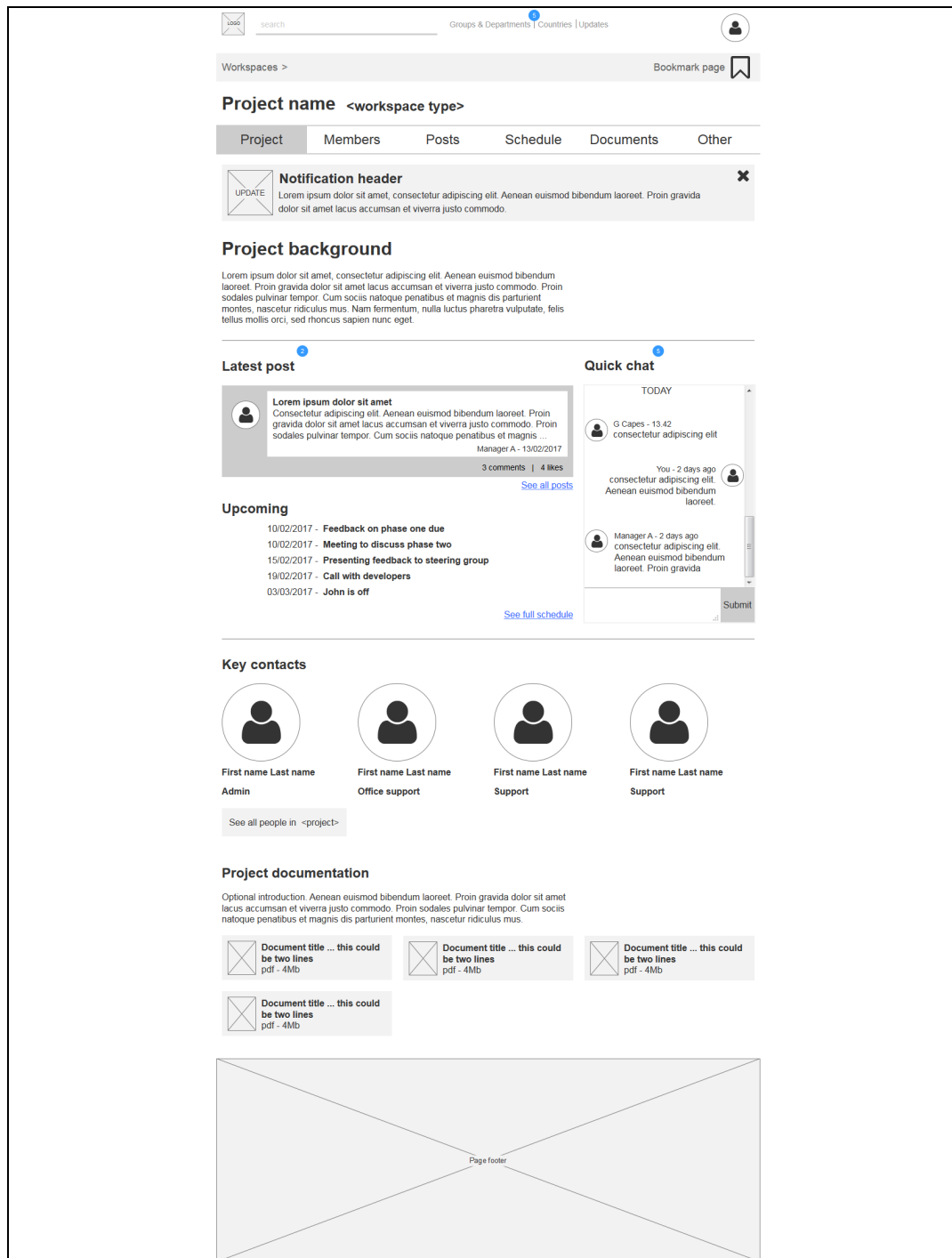
Although many companies use megamenus effectively, the EBRD team felt that having too many links in a global nav would deter staff from getting familiar with the new intranet and using its search facility. It also felt that a megamenu approach would lead users to become too dependent on idiosyncratic click paths, which had become the *only* way to get anywhere in the old system. Finally, the team thought a large menu might make the platform feel more complex and less user-friendly than it really was.

Legacy was another consideration. The old intranet had offered a confusing and inconsistent menu structure with numerous options, none of which felt intuitively organized or related to any overall logic. However, staff had grown accustomed to using one of its elements—a massive drop-down menu that offered links to all departments at once. This was the most dependable route to navigate the old site, but was also unwieldy and took up a lot of precious screen real estate. While some staff would have happily voted to keep it, the design team knew that doing so would deter people from using the search or from engaging fully with the site and buying

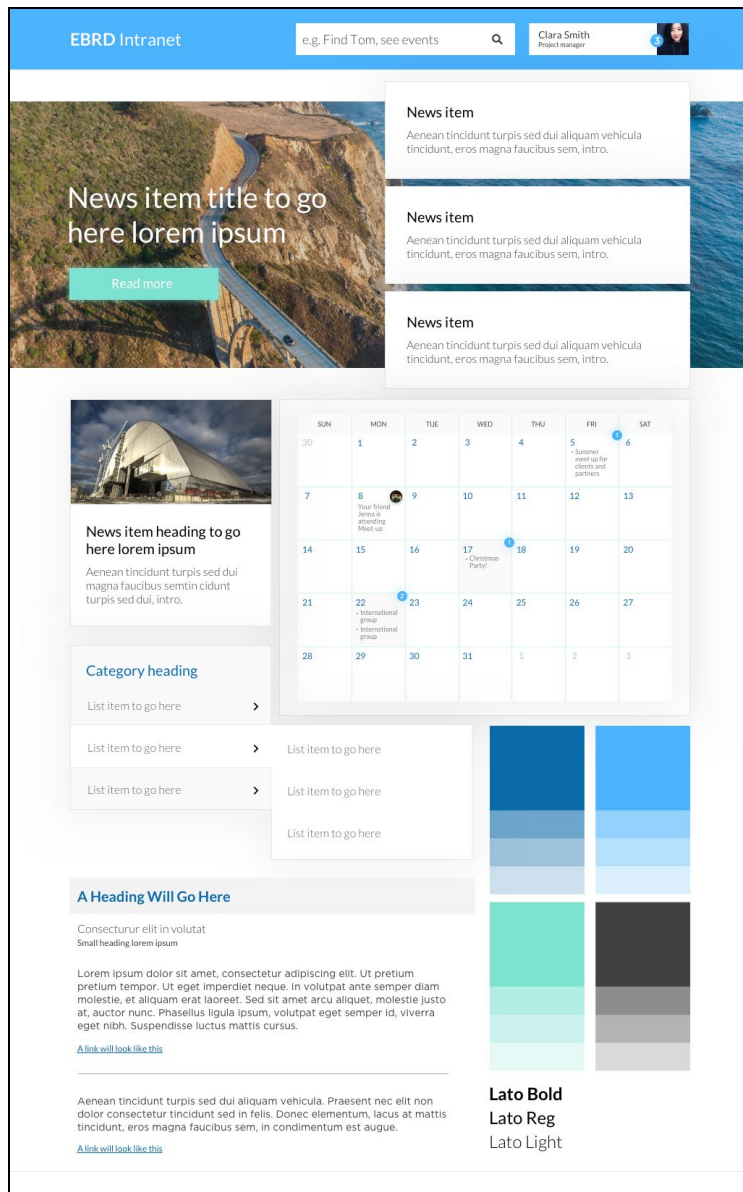
into its new structure and simplified approach. So, the new design's ultra-simple navigation was another purposeful step away from the old approach.



Pictured: EBRD Intranet Homepage Wireframe. This is an example of one of the many layouts discussed during the design phase. During the homepage wireframing process, the team considered more than 20 possible concepts. Getting the homepage right was identified as such a key factor in the success of the new site that it was scrutinized by the project team and user-tested more than any other facet of the site.



Pictured: EBRD Intranet Spaces Wireframe. A wireframe from the development of *Spaces* (at this point, labeled “Workspaces”) shows the higher complexity level in earlier iterations. Simplicity was a vital goal, so the final UI was less complex, had fewer features, and was easier use.



Pictured: EBRD Intranet Early Design Concept. The designers rapidly produced several different design options and user-tested each to get a quick feel for what staff members liked. In this example, a tentative and somewhat arbitrary UI was used because wireframing was happening in parallel and there was not yet a finished layout on which to hang design examples. The project team initially looked at general consistent traits—such as how flat the design was, the size of text, font choice, and the squareness of panels—so that user testing could focus on palettes and the design’s general tone and feel.

Adoption and Buy-in

Adoption and buy-in was probably the area of broadest concern for the project team, yet it was also an area that played out in a pleasantly surprising way.

Having a beta phase was a positive, controlled way of allowing staff members to adjust to the new site without forcing it on them all at once. Allowing them to explore the new platform at their leisure—and on their own terms—optimized the likelihood that they would receive it well, as opposed to simply switching them all over from the old intranet to the new one on launch day.

Further, running so many user tests at each design stage with users from across the organization meant that hundreds of staff members were aware of the project and/or had seen snippets of it. That approach reduced the possibility of shock, created a positive buzz, and reinforced the point that the project team was truly taking staff input into account. Other outreach activities included:

- **In-person demos:** During the beta, the team set up a table in the HQ building's coffee bar area and staffed it with team members armed with laptops—and chocolate. The team members did a demo of the site surrounded by lively digital signage advertising the launch. Staff members could stop by, ask questions, give feedback, and, again, feel that they were being encouraged to engage with the project rather than having it thrust upon them as a fait accompli.
- **Digital signage:** Digital signage was a key method of change management throughout the project. The EBRD has several large screens in its HQ building. Early on, the team used these to run simple teaser advertisements with a save-the-date message referring to the launch day later in the year. As the project progressed, the project team's marketing designer created several eye-catching animated promos for new intranet features to prepare staff for the type and scale of change that was coming. And, during the beta, the digital screens showed glossy explainer videos to communicate the breadth of new features and precisely how to use them.
- **Evangelists:** Another strategy that worked well for boosting adoption rates was an effort to target evangelists among senior staff who would give public support to the project and engage with the new intranet's interactive features early on. The evangelists provided validation and demonstrated to other staff that the new platform was easy to use, was blessed by members of EBRD's upper orders, and was something to embrace rather than fear.
- **Remote staff outreach:** Change management and marketing activities were more challenging when trying to reach RO audiences, who couldn't benefit from the physical marketing efforts in the London HQ. This audience was given a lot of personal contact via all-staff emails in each office, updating them on the project's progress, as well as creating a connection between the project team's content coordinator and the intranet representative at each RO.

One initiative that proved successful at involving remote staff with the new intranet was a set of competitions that were run to celebrate the beta launch. The first of these was a contest to encourage staff members to update their profile pages. Everyone who wrote a short bio and chose topic tags for their profile was entered into a drawing for a tablet PC. Another contest awarded Beats headphones to the person who did the most to engage with the new platform during the beta phase. The winner was a person who added lots of useful information to his profile page and wrote enthusiastic posts in the weeks following launch.

OUTSIDE AGENCIES	
Agency	Project Role
Manifesto Digital A full service digital agency	- Developed UX, IA, and visual design - Ran user testing sessions
VASS IT A full service digital agency	Developed front-end code, CMS implementation, back-end integrations, technical delivery, deployment

GOVERNANCE

Toward a Decentralized Ownership Model

The EBRD intranet is owned and run by the Communications Department. In the past, this in itself led to perceptions among some staff members that the intranet's main function was as a management mouthpiece, used to broadcast propaganda that the Communications staff were curating.

One of the redevelopment project's goals was to push past that kind of skepticism. This meant that the new intranet had to feel open and uncensored. Letting staff members publish anything they want and comment on what others post diminished the charges of propaganda and increased staff enthusiasm and engagement.

Communications continues to edit the homepage, which is the intranet's central hub. However, because the homepage offers a broad mix of content—and about 70% of it is created by non-Communications staff—the sense of controlled management of news easily dissipates.

Content decentralization was also a factor in the new intranet ownership model. By devolving responsibility for intranet sections and empowering departments to play a much more direct role, the sense of overall Communications ownership further diminished in a positive way. Indeed, the Communications team now seems to be perceived more as a facilitator and coordinator of the intranet than as an owner, which was very much the intention of the project.

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
Internal Communications Core Team (3)	• Provide editorial ownership • Manage homepage content • Create and publish news items and posts • Provide editorial support for staff who need help writing or publishing content • Provide first-line nontechnical support and basic troubleshooting • Own roadmap for intranet enhancements • Publish CMS content on behalf of overseas offices that lack publishing access
Intranet Adviser (1) and Digital Development Lead (1)	• Provide first-line, nontechnical support and basic troubleshooting • Capture feature requests and manage discussion around queries, issues, and enhancement requests • Liaise with IT to develop new roadmap features • Arrange training and support documentation for business content managers
Business Content Owners (approximately 80)	• Update content in their section/area • Engage with core internal communications team to propose new features or enhancements
Resident Office Content Owners (approximately 40)	• Liaise with core internal communications team to publish content
IT Developers (2)	• Provide technical support/troubleshooting when genuine issues are confirmed • Develop and release new roadmap features in collaboration with Digital Development lead
End Users (approximately 3,000)	• Publish content through the front end • Involve Internal Communications core team for editorial or practical guidance • Propose enhancements and give feedback

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	Intranet.ebrd.com
Default Status	The intranet is the default homepage for all staff browsers upon login and cannot be replaced. Also, IE boots automatically upon Windows login, so all staff see the intranet homepage at least once per session.
Remote Access	Users can access the site through the company's Citrix infrastructure. They can also visit the mobile site through either EBRD iPhones or on a BYOD basis, in both cases using the BlackBerry for Work browser.

TIMELINE

PROJECT MILESTONES	
Milestone Date	Milestone Description
1999 (approximately)	First company intranet launched
November 2012	Minor redesign to homepage and navigation
September 2013	WebCenter Sites procured for external-facing websites, with the intention of later use for new intranet
Summer 2015	Based on the (later thwarted) expectation of starting the project that year, wide-scale staff survey carried out to gather feedback about existing intranet and wish list for a new one
October 2016	New intranet project green lit and budget agreed
November–December 2016	- Project preparation: recruitment, internal staffing arrangements and logistics, RFP for agency support - Initial top-level user research to capture general ideas and suggestions, development of Axure prototypes to demo early concepts to staff and generally test the water - Agency vendors evaluated and procured
January 2017	Project begins in earnest
April 1, 2017	Launch of first iteration of new intranet based on the new <i>Staff Guide</i>—a set of pages detailing all rules and regulations about working at EBRD
Early September 2017	Beta version of full new intranet
Late November 2017	Beta version of the new intranet becomes the default standard intranet; old intranet (and CMS) retired and available only as a static archive
Overall redesign timeframe: 1 year (including preparatory stage)	

CONTENT AND CONTENT MANAGEMENT

Contributors

Many dozens of business areas and all ROs are represented on the intranet, and each has a designated intranet representative. These representatives are often those whose main job involves communications, outreach, or working on interdepartmental initiatives; however, intranet work is typically only a very small part of their overall duties.

Intranet representatives are given CMS access and may be joined by one or more other CMS users in the same area depending on need and workload. They're responsible for their own content and are fully entrusted to cover it, keep information up-to-date, and adhere to best practices based on guidance from Communications.

An email group for all CMS users is used for communicating updates, patches, and downtime, along with new features. Substantial enhancements are also publicized on the intranet homepage as news items and sometimes on the organization's digital signage system as well.

CONTENT DEVELOPMENT AND OVERSIGHT	
Contribution	Likely as a reflection of the new intranet's quality, CMS user engagement is strong and so far has required little encouragement. Further, since launch, several teams that weren't previously involved in the intranet have requested a presence and become directly involved. Departmental intranet representatives have done a good job of keeping functional content updated and have contributed plenty of news content about their area to supplement and keep it fresh.
Training	New CMS users get introductory training, which is always tailored around real-world content needs and takes place only when they first have something to publish. Compared to nebulous full-system training, this approach is more effective as it is tailored to users' specific needs. The CMS is very easy to use, but new users need one or two further ad hoc refresher meetings after the first training. Extensive training materials were assembled for CMS users. One of the benefits of the new intranet and the use of WebCenter Sites is that calls for support have dropped significantly. This extends to general CMS use as well as publishing blockages and other system faults. Things run far more smoothly than in the past. Also, when Communications gets calls now, those calls are almost always for a positive reason, such as users wanting help to improve a section, build a more creative layout, or try something new.
Management	The intranet is new enough that formal processes for governing its maintenance are not yet in place. In time, however, the team will introduce general rules and procedures to politely compel everyone to attend to their content duties. A CMS upgrade planned for 2019 will provide advanced tools to finally enable automated content management auditing as well as track who is publishing what and when.

Maintaining Quality	The Communications team keeps an informal eye on many intranet sections on a daily basis and follows up with departmental representatives if issues are identified. Ultimately, however, there is too much content and not enough resources to truly, formally police the content, so in-page feedback modules on each page are the primary way users can alert the intranet team to content that is incomplete, out-of-date, or unclear. There are also comment forms and a simple <i>How useful was this information?</i> module that lets users choose a usefulness star rating for any page. Users have contributed a huge amount of feedback through these tools, so the self-policing approach is proving useful. Longer-term, however, the team knows it must create more formal quality-control measures—a task that remains on the intranet roadmap.
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Culling Content

A dedicated content coordinator on the project team was tasked with liaising with every EBRD business team and RO to designate an intranet contact. In some cases, the contact was a person who had interacted with the Communications department to publish content on the old system, but mostly they were newly appointed content owners.

These coordinators were informed about the redesign and encouraged, from very early in the project, to begin considering the content they wanted to include in the new intranet. Staff members were happy to participate in this process and were generally keen to be quite brutal with the submitted content, cutting it down where needed and, in many cases, opting to create brand new content from scratch. As templates were developed, the project team kept staff members informed about available layouts. Those staff members simultaneously participated in the project's UI design process by letting the design team know which formats and UI elements worked for them.

Despite being a mess, the EBRD's old intranet didn't have an outrageously high number of pages; it just felt like it did because the IA was so random and little thought had gone into its development. The problems worsened over the years as neglected pages lived in isolation and business teams often simply parked a fact or a piece of content on a page without thought to its usefulness or visibility. The result was countless pages with just a paragraph or two of content. The key goal, then, was not so much to cull the overall amount of content as to organize the content and create a framework for more disciplined contributions.

To make this happen, the team used three methods:

- **Combine pages:** A right-hand “scrollspy” widget for anchor links was introduced for regular content pages. This made it easier for readers to digest long pages, and thus encouraged business teams to condense several pages into one. In many cases, the project team was able to merge five or more existing content items into a single page, which not only reduced the overall number but also created a more ordered UX.
- **Dive deep:** Content owners across the business were given extensive guidance and encouragement to look at their content from scratch and take a measured, fresh approach to how they might best communicate the information. By allowing ample time for this activity, content owners had the chance to work in-depth with their respective teams and managers to give each area as much input as needed into the new content.
- **Apply best practices:** By offering guidance on best practices for structuring and writing good content, and delivering in-page widgets that supported a varied layout, the project team gave further encouragement to teams to have fewer pages, but with more information on each. WebCenter Sites makes it easy to apply pre-designed styles to content when it’s produced, so content managers can easily add tables, tabbed boxes, step-by-step guides and other in-page UI components to support the production of readable, compelling, and streamlined content.

TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and Operating System	• Apache httpd/2.2.15 • Apache Tomcat/7.0.82
Bug Tracking/Quality Assurance	• JIRA
Design Tools	• Axure, Photoshop, Sketch, Omnigraffle
Site Building Tools	• Java, Javascript, Angular, Maven, SVN
Content Management Tools	• Oracle WebCenter Sites
Search	• Solr
Other Functions	• Authentication via Kerberos • REST API using Spring Boot • Integration with SAP for staff profile content • After Effects for animated marketing • Brightcove and YouTube APIs for video integration

Replacing Obsolete Technology

EMC Documentum was the platform powering the existing intranet. In the past, it was a robust enterprise-grade system, but it hadn't received adequate support in many years and would soon be retired by the vendor. Even without that end-of-life status, it would not have been viable to build a new intranet with the old CMS.

Because WebCenter Sites had been in place since 2013 to power EBRD's external websites, building a new intranet with it was the obvious and only choice. The intranet benefitted greatly from the enhanced system understanding that the organization's IT and Communications teams had gleaned from prior WebCenter Sites projects. The intranet implementation of WebCenter Sites was far better organized and executed than earlier website projects, thanks largely to VASS IT's expertise and extensive experience with the platform.

In early discussions and during procurement, a recurring concern was that the kind of social intranet the team wanted—one with lots of front-end interaction and per-user personalization—would not be achievable using this platform; some thought a portal product would be needed to handle authentication and personalization. Others assumed that third-party plugins might be needed for the social components. However, the VASS team insisted that WebCenter Sites could cover everything, and this assertion really paid off. The business owners are now able to manage the whole platform—along with other web products—through one CMS.

Choosing the Right Technology for the Job

Several technology-selection decisions fell into place without much deliberation. WebCenter Sites was the only choice for content management, and SOLR was a part of that, and the SAP payroll system had to be leveraged for staff profile data.

Kerberos was already EBRD's preferred protocol for authentication management, and Angular was a preferred framework for in-house web development and thus became a natural choice.

One of the main discussions about technology use focused on user-generated content elements—specifically, whether *Spaces* and *Posts* should be developed as functionality entirely outside WebCenter Sites, which might allow a faster front-end experience for the staff using them. It was ultimately decided that, for a small trade-off on speed, having those elements developed within the CMS framework would have more advantages and be more efficient. For example, when staff members request assistance with user generated content, the Communications team can access it in the CMS to troubleshoot or develop it.

So, the end result provides vital access for Communications staff to support and troubleshoot UGC. The downside is that when staff members create a post or space, it doesn't go live until the next automated publishing time. Because these times are 20 minutes apart, the delay is anywhere from 1 to 20 minutes. This turned out to be less a concern than expected; few staff members have objected to the delay and there's even been feedback that it's useful in that it gives contributors a small window in which to refine their work before it's live.

The EBRD produces numerous marketing videos and many of these are of interest to staff, so providing video players within the intranet was important. The intranet also needs to show staff-only videos. EBRD's existing video hosting platform was Brightcove, whose API was leveraged to let content managers easily add Brightcove videos to pages. On the homepage, videos can be played in situ—from a promo—and users can click on a video and have it play right there in a light box. The team also integrated YouTube, which is a secondary option for video presentation.

MOBILE

Mobile Enough for Now

The new intranet is about 75% responsive—that is, 75% of content is adequately usable on a phone. The team felt that templates adapted to a phone-sized viewport were essential—and mostly achievable as part of this project—but a separate dedicated tablet-size version would be superfluous and not viable.

The more complex templates are not yet fully mobile-friendly, so they remain in the roadmap. During development, the team tried to be sensibly future-aware, and in some cases even managed to apply a mobile-first philosophy. At the same time, in the rush to get the basics covered, it could not justify treating mobile performance as a huge priority because, at that time, internal system use on mobile was very limited and there was no reason to expect an imminent change. Getting things working well on desktop was by necessity an absolute priority, followed by ensuring only the most basic mobile performance.

Mobile Strategy Challenges

Creating a mobile version of the new intranet was challenging because of the uncertainty over an impending IT strategy that could have affected the design approach. The IT department was in the midst of a huge, multiyear transformation and it wasn't possible to know for sure how the intranet would fit into the EBRD's future mobile infrastructure. There had been talk of an Internal Communications app and a refocus around a portal platform, but nothing was at all certain. The safest bet was therefore to simply develop as much responsive functionality as possible in the intranet with a view toward having it work as well as a mobile website. This would mean that staff members could use the intranet from mobile devices as long as they were authenticated into the EBRD network.

Mobile access on the legacy intranet was very limited by the mobile browser used, so there was no legacy mobile experience at all.

In the months after the new intranet was launched, a separate initiative replaced the mobile browser that staff members can use. This more-robust approach, coupled with the new intranet's decent responsive behaviors, has resulted in much improved and more popular mobile usage.

Currently, nearly all of the new intranet can be used adequately on mobile, although complex interactions, such as those in user posts and collaborative spaces, are not really suited to mobile usage. Further, even when the basic mechanics work, some of the mobile UI components are merely satisfactory in terms of UX, so mobile is certainly an area where resources will be focused in the months and years ahead.

ROI

Success Measured Through Engagement

In keeping with EBRD's new internal communications strategy, the big metric for this project was *engagement*. The project sponsor wanted the new intranet to promote interaction, information sharing, and collaboration in new ways. Given this new direction for staff, setting specific targets seemed unwise as it could take months or years to tease out solid staff engagement and willingness to interact. Instead, the project team set a very informal target of getting 10 posts or *Spaces* by Christmas 2017, which was almost two months after the full launch. The team hoped to achieve this goal by proactively asking senior staff and evangelists to lead the way and participate in the writing.

All expectations were surpassed; by Christmas break, there were more than 150 posts and *Spaces*; a few months later, that total exceeded 1,000. In addition to these published content items, there were many thousands of comments and discussions and likes. People were engaged. Once team members noticed that EBRD's President had been looking at content and clicking the *like* button, it was clear that their approach had paid off and that the previously feared taboos around staff contribution had been overcome.

The new platform has resulted in many other engagement gains, including:

- **Increased senior staff contribution:** The new intranet has also resulted in more content originating from senior staff—and in a format that feels more genuine and elicits a better reception. It is the best of both worlds. User feedback on the old intranet sometimes featured words such as “propaganda” because its news items were centralized, and it felt like management was talking at them. Now that everyone can publish whatever they like, content from senior staff is more warmly received, as it is seen in the context of contributions from people from all corners of the organization and across all staff levels. Content from senior staff also tends to have a slightly different tone of voice now: it’s more open and more unifying, and thus is often more accessible.
- **Increased content volume:** The volume of new content had not been a specific target, but the proliferation of staff-contributed material means that the intranet now has dozens of new pieces of content each week. In the past, it would be closer to 5–10—the most that an over-worked team of Internal Communications staff, using a cumbersome CMS, could produce.
- **Better engagement from RO staff:** RO staff, like everyone else, can publish directly to the intranet regardless of location or time zone. CMS access, which RO staff does not have, is no longer a barrier to involvement.
- **Reduced support needs:** Another KPI—which wasn’t formally targeted, but was certainly hoped for—was that support requirements would diminish by moving from a challenging, unstable CMS to a simpler and more robust new one. That has certainly been the case. Calls to both IT and Communications have dropped substantially with the advent of the new intranet.

LESSONS LEARNED & BEST PRACTICES

Members of the EBRD team share lessons learned and best practices from their project experiences.

Lessons Learned

- **Change management is a big deal.** “It’s not that the EBRD failed to grasp this. Indeed, the very first person hired for the project was a change management specialist. But while we grasped the importance, we did maybe underestimate just how many facets there would be within the area of change management, and how time-consuming some would be to tackle. It also turned out that many of the trickiest issues, in our case, were offline. The biggest aspects of change management were focused on stakeholder departments that had to come to terms with a lot of new things around content management, as opposed to the end users getting familiar with how to consume and use the new site. End users took to it [the new intranet] with comparative ease (a pleasant relief) but there were many dozens of work streams behind the scenes to cover things as obscure as the terms and conditions staff had to sign to self-publish content, which took a good deal of discussion.

"And with the new intranet doing so much more than the old one, there were concerns from some departments that it could cannibalize other applications. The project team was adamant this shouldn't and wouldn't be the case, and addressed each of these concerns very carefully, and in some instances these sort of discussions became lengthy."

- **Plan for both failure and success.** "With the project being within a bank and operating in a heavily project-managed fashion, there was plenty of focus on risk mitigation, and we really planned in detail for every possible mishap or problem that could happen. This paid dividends on many occasions.

"What we entirely failed to plan for was unexpected successes, where user adoption and enthusiasm went far beyond the most ambitious hopes. The big one was posts. Because self-publishing, and sharing information openly, were such new and big concepts within the organization, there was a wide fear, which came up again and again, that 'people just won't use this.' So, we had plans in place to encourage usage, getting a few cheerleaders to demo the feature and guide others, and so forth. It was even a UI consideration: 'How will this template look if we have to pull out the comments module, which is just a wasteland?'

"But in fact, usage went through the roof. This actually became a problem in a few ways; one was that the homepage design anticipated lots of traditional news stories and the occasional staff post. With a proliferation of posts, the UI felt odd because promos for staff posts had a different look and feel, intended for occasional use, but now they were used several times daily.

"There was also the issue that more use of posts meant more first-line support requirements than had been expected. However easy to use the format was, some staff was wary of using it the first time without guidance. The most 'positive problem' we had was that staff quickly began to demand that posts, which were intentionally made to be ultra-simple (just text and images mainly), should offer more features, like the capacity to embed videos, galleries, and Tweets. So the roadmap was urgently reordered so that such features could be added post-launch."

- **A beta release is a good thing, but be careful.** “The new EBRD intranet had a beta launch two months ahead of the full launch (and eventual switch-off of the old system). This meant the new platform was available to staff, and could be fully used, but the old intranet remained the default main one. This made lots of sense and gave us the chance to detect bugs, capture feedback, and even sneak in some last-minute enhancements. During the beta, we tracked how many staff had looked at it and the numbers were encouraging. Still though, on the day of the full switchover, there was a tsunami of feedback and support requests from the couple of hundred staff that hadn’t looked at the beta at all. Again, it’s not that this wasn’t anticipated, but the scale and impact of that spike was bigger than might have been hoped for. These late adopters also, by definition tended to be a mix of staff that had the least interest in the intranet, and had limited opportunity and/or willingness to devote time to familiarize themselves with it. That meant a perfect storm with this group being the most vociferous and critical audience, making their feedback sometimes more blunt and challenging and all arriving at the last minute.”
- **Employ a mix of personalities.** “If there is a brand new team being staffed up, a mix of personalities is really productive. The project team had a wide mix of nationalities, character types, and temperaments, and it created a great dynamic. Having one or two hard-to-please staff can make for a good benchmark. If a proposed feature can win over whoever is the most cynical member of the project group, then it has a good chance of pleasing staff. Also, the more varied the team, the more likely it is to simulate the similarly broad and mixed characteristics of the ultimate staff audience that the new intranet will face.”

Best Practices

- **A mobile-first approach has advantages beyond mobile.** “It’s unoriginal, but a mobile-first mindset can never hurt, even if you are an organization, like ours, where the intranet is still used overwhelmingly on desktop PCs. If you consider mobile first, you not only have the responsive site falling into place in a streamlined fashion, but you are also forced to give more attention to simplicity and ease of access, and to boiling down UI interactions to a really usable level.”
- **Choose agency partners with care.** When selecting agencies, take into account whether or not they can adequately do the following well:
 - **Handle design as well as development with equal skill:** “Otherwise, consider splitting the two elements like the EBRD did and working with multiple agencies. Development-centric houses may or may not have in-house design resources as good as that of smaller, more design-centric agencies. The EBRD’s experience was that managing two agencies at once didn’t create problematic extra overheads and yielded great results. It also brought a wider and more diverse set of personalities to the project, which meant more collaboration, ideas, and originality could be shared.”

- **Understand the real differences and nuances of an intranet vs. an external-facing site.** “Some agencies are a lot better at this than others. An intranet is not simply a regular website that’s viewed within a company. There’s a lot more to it than that, and not all agencies necessarily appreciate the sensibilities.”
 - **Be engaged with the organization as much as possible:** “When agencies want to work on-site, ask how many staff they’ll be able to do tests with, and make an effort to truly understand you—the customer—then they’re the ones to go for.”
- **Give user testing a seat at the table.** “Testing should be engrained in the project and something that the whole team is focused on and supports throughout. Whether it’s as a large formal round of testing for an IA approach, an ad hoc straw poll of a few people about a color palette, or a case of accosting a few staff in the coffee bar to test an Axure prototype of a widget, it is invaluable to get feedback at every possible opportunity. An intranet project has an advantage versus an external-facing platform in that you have easy access to your actual audience. The downside is that they are going to be more demanding because the intranet is vital to their day-to-day work and they can’t tolerate anything that inhibits or slows them. They also know your name and can find you to provide frank feedback whether you seek it or not, so it’s best to hear their views early on. By testing you cut down the chance of producing anything that risks not meeting your audience’s needs.”
- **Resist the temptation to design overly complex UI widgets.** “Our UX lead was violently opposed to carousels and was determined not to have any UI component that involved having to make effort to find hidden content. It was the right choice, and we can in fact display far more content now on the homepage screen than in the old carousel-heavy intranet.”
- **Encourage project staff to also give input in their capacity as end users.** “Aside from third-party contractors, those working on the project are going to be audiences of the intranet as well its creators. So foster a working environment where they are encouraged to keep giving feedback on that basis, and have a mindset of both working to support the end user and considering themselves one of those end users.”
- **Adopt an Agile project management approach.** “Agile project management made complete sense for the EBRD’s intranet redesign and is easy to recommend, as long as you are realistic about the way to deploy it and align it sensibly with the nature of the project. In our case, several 2–3 week sprints were implemented in the early stages, in heavily governed fashion and using all the processes and roles of Scrum.

"Beyond the core early development and first release, it then made sense to keep doing sprints, but in a fashion that became more free form, with an eye toward Kanban. Later in the project, the activities again called for a more governed approach, so the format became a bit more disciplined/formal and Scrum-like again."

- **Think about governance from the very beginning.** "Establish what the end point for governance will be, especially if it is different from what went before. Also consider how the new intranet will be managed and developed once the redesign project comes to an end. Don't let this be an afterthought."

"In the EBRD's case, advance planning for the governance and management aspects was very difficult for various reasons, particularly as key departments were undergoing many changes in tandem with intranet redevelopment. But with even a partial picture of who would work on the finished intranet and in what capacity, who would own it, and how development management and resourcing would work, it was possible to plan more effectively to support that."

"A redeveloped intranet can achieve many things but [those achievements] have to be sustainable and align with the way the organization works, and particularly the position that the intranet occupies within it. This is critical for the intranet to be a long-term success. Good agencies will get this point, too, ensuring they work toward a model that can operate in the future rather than simply check boxes in the short term."

- **Don't underestimate the scope and effort required for change management.** "Be aware that resistance or skepticism can come from any quarter. Don't fall for misleading clichés, like the assumption that older, more senior staff will resist and struggle with change and younger colleagues will automatically embrace it. The picture is complex. Also be prepared for any aspect of change management to become a major issue, while conversely you may be pleasantly surprised when anticipated challenges blow over."

"Above all else, target a scenario such that when your intranet launches, however good or bad the audience decides it is, they feel like they had a fair level of input into shaping its development."

- **Provide strategic ways for users to give feedback.** "It's imperative to offer end users a clear means of giving feedback and support requests, both on a general level and in relation to individual pages or features. A dedicated email account is perhaps the bare minimum, however, it's also important not to go too far. Arguably the EBRD project team designed too many different ways for staff to give feedback, by having in-page star ratings, an in-page feedback form, an inbox, a helpline, and also a web-form in the footer. Streamlining these and reducing the options (which we did post-launch) was conducive to a more streamlined and actionable flow of feedback."

- **Get the CMS right, and know how to use it.** “We were fortunate to use WebCenter Sites, which is a great platform and served us well. I don’t think the results would have been as good, however, if this had been our first project using the platform. We’d learned how to get the best from it over the course of a few years and could apply that in the implementation of the intranet. So a worthwhile bit of advice might be that intranets—which are by definition ultra-high visibility and therefore high pressure and risk-laden—should use a system you’re robust at using, not one being brought in for the first time.”

Messer Construction Co. (2019)

OVERVIEW

COMPANY

Messer Construction Co. is an employee-owned company that specializes in managing, developing, and performing complex commercial construction and delivering value to clients through quality construction experiences. Since 1932, Messer's track record of success can be traced to past and present architectural icons and institutions located across the Midwest and Southeast. With a sustained commitment to excellence and doing the right thing, it builds its projects safely, on-time, on-budget, and with the utmost craftsmanship, innovation, and care.

Headquarters: Cincinnati, Ohio, US

Company locations: Messer Construction Co. has 10 offices throughout the Midwest and Southeast.

Locations where people use the intranet: Employees at all of Messer's 10 regional offices, construction jobsites, and Corporate Support offices use the intranet.

Annual revenue: \$1.12 Billion

THE INTRANET

Users: Approximately 800 employees; the company has 1,200 employees total, but the majority of them do not have an O365 account, though they can sign-in at a shared workstation. Messer employees use the MyMesser intranet to access the information and resources they need to do their jobs, understand the company and business, and engage with other employees. They also use the intranet to access their personalized professional development and benefits platforms.

Mobile approach: Responsive web design

Technology platform: O365 SharePoint Online

TEAM

Design team: A team of four designed the UI and front end. The UX and design team was responsible for the IA, content strategy, UI design, and SharePoint theming. A software development team, consisting of four developers, completed the SharePoint and front-end development.

Leadership: Bethany Smith, Messer Marketing & Corporate Communication Vice President; John Carder, Messer Vice President, Information Technology & CIO.

Design (Creative Services): Michelle Hendrickson, Cardinal UX Practice Manager; Stephanie King, UI Designer; Adam Keller, UI Developer; David Brun, Messer Graphic Designer.

Development: Matt Tallman, Modern Workplace Practice Manager; James Grizzle, SharePoint Architect; Zac Brumbaugh, SharePoint Developer; Susan Critzer, SharePoint Developer; Kim Schaff, Messer SharePoint Admin.

Project services: Katie Cozad, Cardinal Project Management; Blake Porter, Business Analyst; Nan Hatch, Business Analyst; Scott Grothaus, Messer PMO Director.

Content strategists: Jessie Folmar, Messer Senior Public Relations Manager; Jackiedra Wilson, Messer Senior Marketing Manager; Nick Apanius, Messer Operations; Andy Burg, Messer Operations.

INTRANET TEAM



Team members shown here (back row, left to right): Adam Keller, James Grizzle, David Brun, Matthew Tallman; (middle row, left to right): Zac Brumbaugh, Kim Schaff, Scott GrotHaus (tablet), Jessie Folmar, Jackiedra Wilson, Michelle Hendrickson, Susan Critzer, Blake Porter, Andy Burg (tablet); (front row, left to right): Katie Cozad, John Carder (tablet), Bethany Smith, Nick Apanius (tablet).

HIGHLIGHTS ABOUT THIS WINNER

At Messer Construction Co., in-house designers and developers merged harmoniously with the agency they hired. As a team, they meticulously researched the users, their tasks, and their needs—and together they created MyMesser, a highly supportive solution for employees in the field or in the office.

- **Celebrating employees:** Messer Construction Co. fosters a culture of celebrating its employees and recognizing them. Executive promotions, new employees, and work anniversaries are all prominently showcased on the homepage.
- **Project information:** Descriptions, teams, photos, and live video feeds are just some of the ways employees stay abreast of all the construction projects the company is involved with. Consistently sharing this information with everyone ensures that all employees feel that they are part of the team. It also helps them get excited about the work the company produces and find new and creative ways to support the business.

- **Skilled trade workers section:** In-depth user research revealed the necessity for skilled trade workers—also known as the *Craftforce* at Messer—to have immediate access to checklists and resources while working in the field. A special section of MyMesser consolidates much of what they need in one place, and is usable on mobile devices; this is critical because, unlike business-side employees, Craftforce employees primarily access MyMesser on smart phones. This is an example of how the team thoroughly investigated its employees' needs, defined the challenge, and then created a design solution that not only supports the core business tasks, but also aligns with company values.
- **Communication:** News, short videos from leaders, and project information are all used to help keep employees informed, interested, and invested.
- **Work and life balance:** The intranet makes it easy for employees to see health benefits, discounts, time off, and more.
- **Team volunteerism:** Employees are encouraged to volunteer and improve the community around them. Their plans and efforts are shared on MyMesser in places such as the events calendar and *Community Report*.
- **Mobile:** The site is responsive, and more than 75% of its users access MyMesser on smart phones or tablets. Stakeholder involvement contributed to decisions about which content should appear on mobile and how. More importantly, user research—including task prioritization exercises—helped the team determine which features should take precedence over others, and whether to remove some features completely or just from one channel. Also, the mobile design accounts for key factors such as screen size, page load time, and data plan usage.
- **UX research infrastructure:** The team concentrated its user research in the most impactful activities, such as discovery interviews and meetings, focus groups, interviews, surveys, card sorting, and creating and using personas. Choosing the right research method at the right time helped the team make confident, thoughtful design decisions.
- **Departments and regions sections:** Site areas aimed at supporting different departments and regions have a consistent design, which helps employees more easily glean the same types of information no matter which group or location they are attempting to learn about.
- **Breadcrumbs:** Breadcrumb trails are an oldie, but they're still a good feature. They help users stay anchored, discover more about the available site sections, and more easily navigate up a level in the site structure.

BACKGROUND

Goals

Messer wanted to design and implement a responsive, best-in-class employee portal that would strengthen the company's online presence with users—especially those

disconnected from the office buildings. The design team also wanted to improve the UX and increase adoption. The new portal design was aimed at meeting all of these goals.

The new site is vastly different than the last two iterations of the company's intranet, which were glorified message boards. Those sites had navigation that wasn't intuitive; ineffective search functions; and zero optimization for mobile. The new site supports both the business and the Craftforceteams. These two groups had different site needs; through discovery sessions and IA workshops, the intranet team was able to design one solution that effectively supported the needs of both.

Challenges

The team faced two primary challenges in designing a new portal to replace a failing intranet:

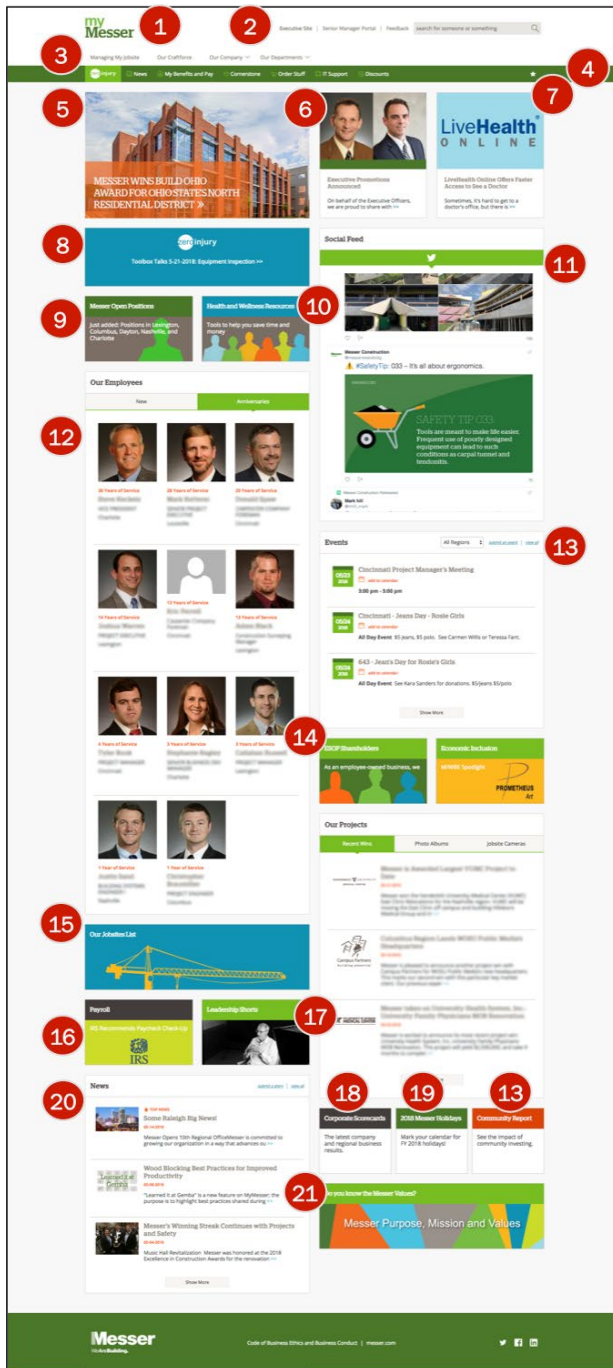
- **Diverse workforce:** The design team knew that the biggest challenge was going to be the company's diverse workforce and the way people used (or didn't use) the company's legacy intranet.
- **Overcoming a bad reputation:** Because its business is distributed, Messer has many regional offices, which results in a lot of content that needs continual distribution. The legacy intranet had earned a bad reputation with users because it lacked both content strategy and content governance. As a result, users could not find what they were looking for—and what they could find wasn't always the one source of truth.

Approach

The project originated in both the marketing and IT departments equally, and there was some urgency to get it rolling. The Messer marketing team kicked off the project with a discovery roadshow and analytics overview to help determine user needs before bringing in its agency partner. That partner, Cardinal Solutions, was able to take the initial discovery work and meet with stakeholders to create a solution vision. Once the vision was in place, the project continued with a discovery phase followed by design and roadmapping for the future phase of development.

DESIGN REVIEW

Homepage



Pictured: Messer Construction Co. Intranet Homepage. The MyMesser homepage is a portal to important content that employees need to help them do their jobs.

Homepage, Highlights

On this homepage, users can find everything from news to employee promotions and new hires. It also features information on work projects and how to stay safe on the job. It is chock-full of information, yet not overwhelming. The consistent style, diversity in content types, chunking and headings, and whitespace between sections makes the page scannable and manageable. And, all in one place, Messer employees can find much of what they need to stay informed and feel like they are part of the company team.

- 1. Logo:** The *MyMesser* logo appears in the upper left of all pages. Given that there are other portals at the organization, this logo helps employees stay grounded when they are using MyMesser.
- 2. Utility navigation and search:** Utility navigation and search are located to the right of the logo, and subtle links to the *Executive Site* and the *Senior Manager's Portal* appear at the top of pages. These sites are important enough to warrant this prominent page real estate, but the small light grey links ensure that they won't distract those employees who don't have access to or don't use those sites. Likewise, the *Feedback* link is there for those who want it, but it's not in the way for those who don't. The search field is flexible and always available. It beckons users to type a topic or a name.
- 3. Global navigation:** Grey links on a white background comprise the site's global navigation. Extensive user research, including card-sorting research studies, helped the team confidently create this narrow menu structure with only four first-level choices: *Managing My jobsite*, *Our Craftforce*, *Our Company*, and *Our Departments*. The star icon on the right leads to favorites, so users can easily access their saved pages.
- 4. Popular links:** User research not only informed the global navigation, it also helped dictate which site areas are most important to employees and which are the most accessed. The *Quicklinks* section, which appears in green just below the global navigation, showcases some of the most-needed parts of MyMesser. Only the seven most important items are awarded space in the green action bar, so users can easily find the key commands without being overwhelmed by too many choices. Only design discipline—grounded in good user research—gives teams the confidence to make bold decisions such as this.
- 5. Key news story:** An important recent news item is allocated the homepage's first, leftmost content block. A related photo accompanies the headline, which acts as a link to the full story.
- 6. Executive promotions:** It is in Messer Construction Co.'s culture to celebrate executive promotions. These are announced on the homepage, with executive photos, to humanize the stories.
- 7. Online doctor visits:** eVisits with doctors are becoming more and more common. To allow employees the most flexibility possible, as well as access just-in-time medical care, Messer Construction Co.

offers eVisits as part of its health benefits. These are advertised on the homepage in a prominent spot that also displays new benefits, events, articles, and so on.

- 8. Zero injury:** Construction can be a dangerous business. Understanding this, Messer emphasizes the health and safety of its employees in the field, and everywhere else. The homepage's *zero injury* section advertises weekly mini-newsletters to promote hazard awareness and help employees stay safe and healthy.
- 9. Job openings:** Understanding that retaining employees and encouraging upward and lateral movement within is healthy for both employees and organizations, Messer advertises open positions on the homepage. The *Messer Open Positions* block lists the locations of the newest open positions.
- 10. Work life balance:** Messer strives to ensure that employees are content outside of work also, as it makes for a happier human and a better employee. The homepage's *Health and Wellness* section leads to a site section that helps make employees' life a little easier.
- 11. Social:** A large *Social Feed* section displays Messer's Twitter feed (@messerwearebldg), which is the most active social platform for Messer. Displaying it on the intranet's homepage helps employees stay up-to-date on what clients and partners are saying about the company.
- 12. Employees:** The *Our Employees* section uses about a fifth of the entire homepage, demonstrating the importance of celebrating individuals. The *New* tab displays new hires, so fellow employees can see which roles have been filled and get to know the people who filled them. The *Anniversaries* tab shows photos, names, and job titles of employees having a Messer work anniversary. It's fun for employees to see and congratulate their coworkers—whether they are new coworkers or those who have worked at the company for more than 30 years.
- 13. Volunteerism:** The *Events* calendar lets employees share information about events they plan to volunteer for. Further, the *Community Report* section leads to information about how Messer and its employees have worked to improve the community around them.
- 14. Shareholders:** The *ESOP Shareholders* section reminds employees that Messer is an employee-owned business, and leads to information about their shares and the company's performance, along with four short videos that explain how the ESOP works and how it benefits employees in the long run.
- 15. Projects:** Construction projects are the core of the business. Whether employees work on the job sites or in the home office, they want to see the work the company is producing. The homepage's *Our Projects* section displays news about recently won projects (*Recent Wins* tab), a gallery of images from the jobs (*Photo Album* tab), and live video feeds from the current job sites (*Jobsite*

Camera). The *Our Jobsites List* section, which appears on the left of the homepage, links to all the job sites, current and completed. This is another way for employees to learn about the details of the core work, to see what their colleagues do, and to find new ways to support the business.

16. Payroll: Employees use the easily accessible *Payroll* area to fill out their timecards.

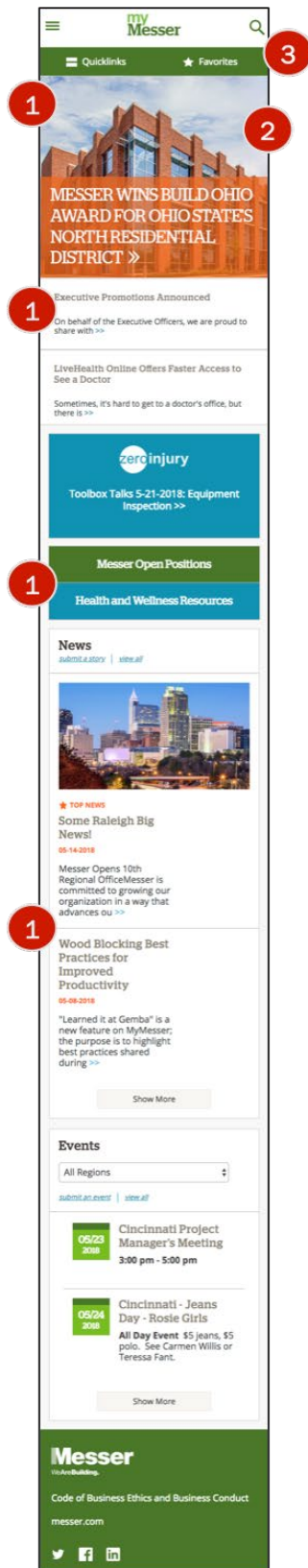
17. Leader messages: *Leadership Shorts* links to video messages about all levels of leadership, from Craftforce to executives. This is one more way that managers include all employees on their corporate journey.

18. Corporate performance reports: The *Corporate Scorecards* section links to reports about how the company is doing compared to its competitors.

19. Holidays: Another part of work/life balance includes time away from work. Employees can see a list of holidays for the current year on the homepage so they can plan ahead for both work and play.

20. News: A few of the top news items appear on the left near the bottom of the page. A title, date, clip of the article, and related image make the list easy to digest.

21. Mission: To remind (or teach) employees about the company mission, purpose, and values, a link to these appear toward the end of the homepage.



Homepage, Mobile

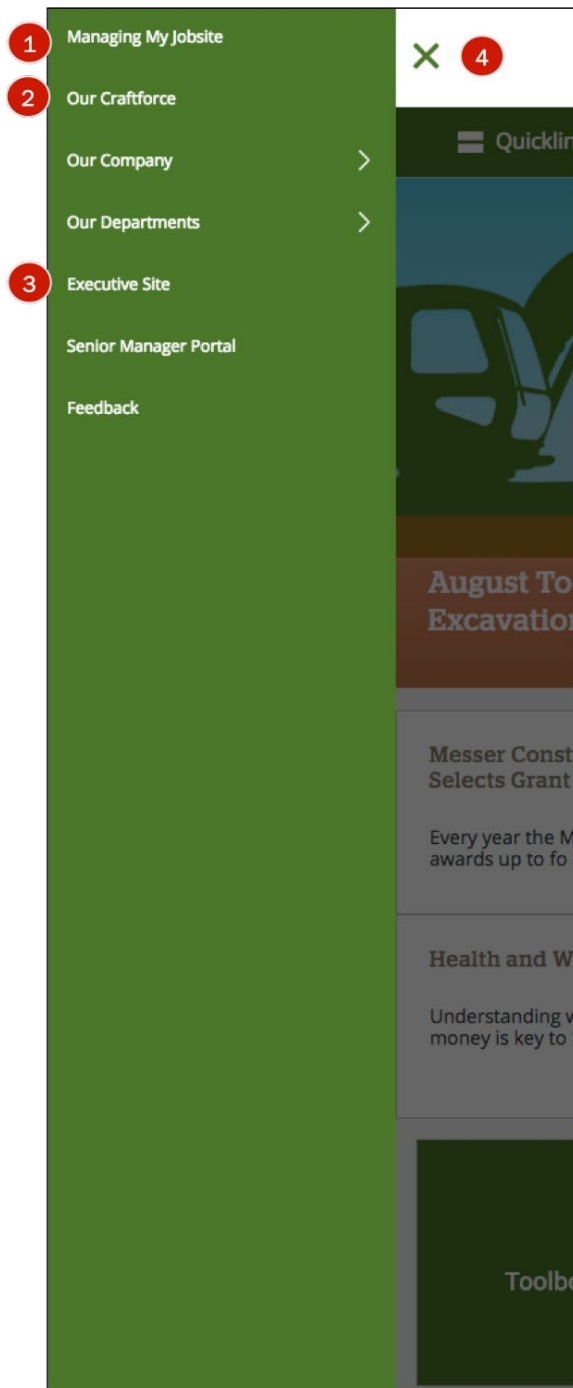
Pictured: Messer Construction Co. Intranet Homepage Mobile View. Content and navigation is optimized for mobile on the MyMesser intranet.

Homepage, Mobile Highlights

When researching with users for the MyMesser redesign, it was obvious early on that everyone—from the support team in the back office to individuals on the jobsite—wanted mobile capabilities. In particular, field workers who need access to processes and safety documents would benefit from access on their mobile devices. The new site is responsive, though a few sections are not available on mobile. The team determined which content and features should be on mobile and the order and way in which they should appear. These topics were discussed during several phases, including discovery, content migration, and content strategy priority sessions.

- 1. Images shrunk or removed:** On mobile, several images that appear on desktop are either excluded or made smaller to accommodate the mobile screen size, ensure fast page load time, and be mindful of employee data usage. The main news item appears at the top of the screen, in a high-priority position than on desktop. But the related image is smaller, and the headline banner spans the entire image on mobile. Unnecessary images—including purely aesthetic ones, such as the colored silhouettes in the *Messer Open Positions* and *Health and Wellness Resources* graphics—don't appear on mobile, but the consistent green and blue colors make the sections recognizable. Likewise, photos are not included in the *Executive Promotions* section and with some news items.
- 2. Priority:** The high-priority features appear toward the top of the mobile screen. Some content, such as new employee and anniversary announcements, were omitted from mobile. Similarly, the Twitter feed does not display on mobile since it has its own app.
- 3. Navigation:** The global navigation, quicklinks, and search are all collapsed under icons to make the most of the screen real estate.

Navigation, Mobile

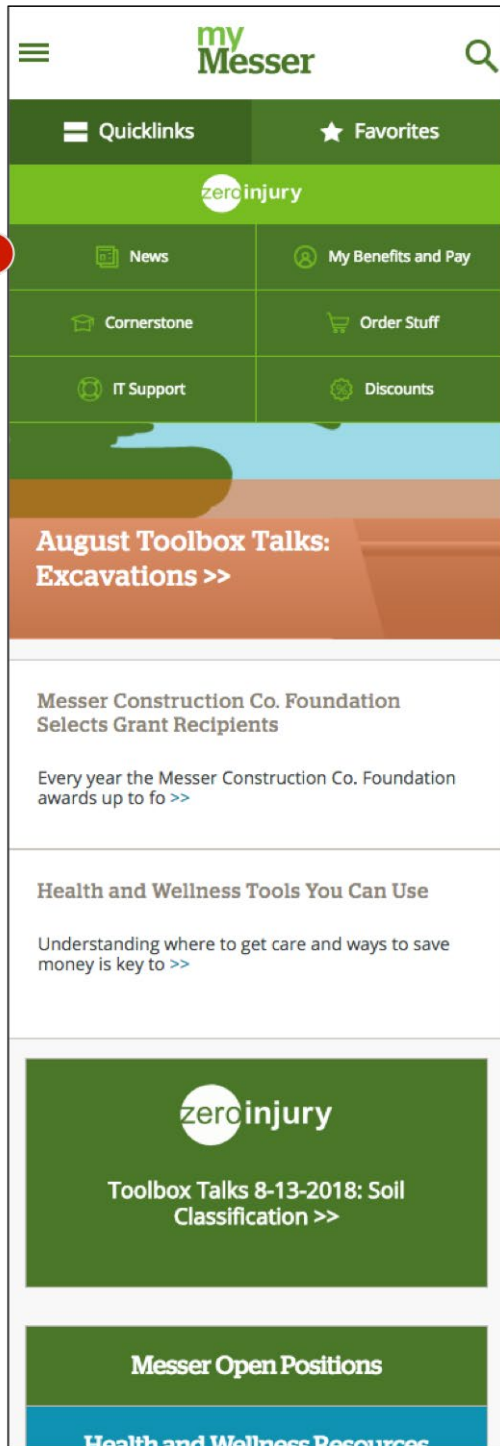


Pictured: Messer Construction Co. Intranet Mobile Navigation. The expanded hamburger menu includes links from the global navigation and utility navigation.

Navigation, Mobile Highlights

The global and utility navigation links are combined under the hamburger menu in the MyMesser mobile view.

- 1. Pillars:** When users tap the hamburger icon to open the menu, the first link is *Managing My Jobsite*. This leads to a page with Messer's four operational pillars.
- 2. Global navigation:** The links in the desktop site's global navigation are the first set of links in the expanded hamburger menu on mobile.
- 3. Utility navigation:** The links in the desktop's utility navigation are the last set of links in the expanded hamburger menu on mobile. Users with access can go to the *Executive Site* and the *Senior Manager Portal*.
- 4. Close:** Closing a large menu on mobile can sometimes turn into a guessing game or a round of whack-a-mole. Here, the large green x makes closing this menu simple.



Quicklinks, Mobile

Pictured: Messer Construction Co. Intranet Mobile Quicklinks. Users can expand the *Quicklinks* menu to reveal buttons on mobile.

Quicklinks, Mobile Highlights

Links in the desktop's *Quicklinks* area appear as buttons on mobile.

1. Buttons: The links in the expanded *Quicklinks* menu are large and easy to tap. The white text is highly contrasted against the green button color, making it readable.

SERP

The screenshot displays the Messer Construction Co. Intranet search results page for the query "safety". The page features a green header with the Messer logo and navigation links. A search bar at the top right contains the text "search for someone or something". Below the header, a navigation bar includes links like "Managing My Jobsite", "Our Craftforce", and "Our Company".

On the left side, there are three filter sections, each marked with a red circle and the number "1":

- Result type**: A list of file formats including pdf, docx, doc, xls, aspx, html, ppt, jpg, png, pptx, xlsx, zip, docx, msg, vsd, mht, one, website, and a link to "Other Value".
- Content Type**: A list of content types including Document, Item, Image, Messer Page, and Messer Process Flow.
- Author**: A list of authors including System Account, bdielrich, Apanius, Nick, McMahan, Amy, and King, Mike (BSG).

Below these filters is a section marked with a red circle and the number "2" for **Modified date**, which includes a bar chart showing activity over time and a date range selector.

The main search results area shows the query "safety" in a search bar marked with a red circle and the number "3". Below the search bar, there are tabs for "Everything" and "People". A snippet of a document titled "Craftforce Development" is visible, with a red circle and the number "4" highlighting a specific result. The snippet includes a link to "Craftforce Development" and a description of the site's purpose.

At the bottom of the page, there is a green footer with the Messer logo, the tagline "WeAreBuilding.", and social media links.

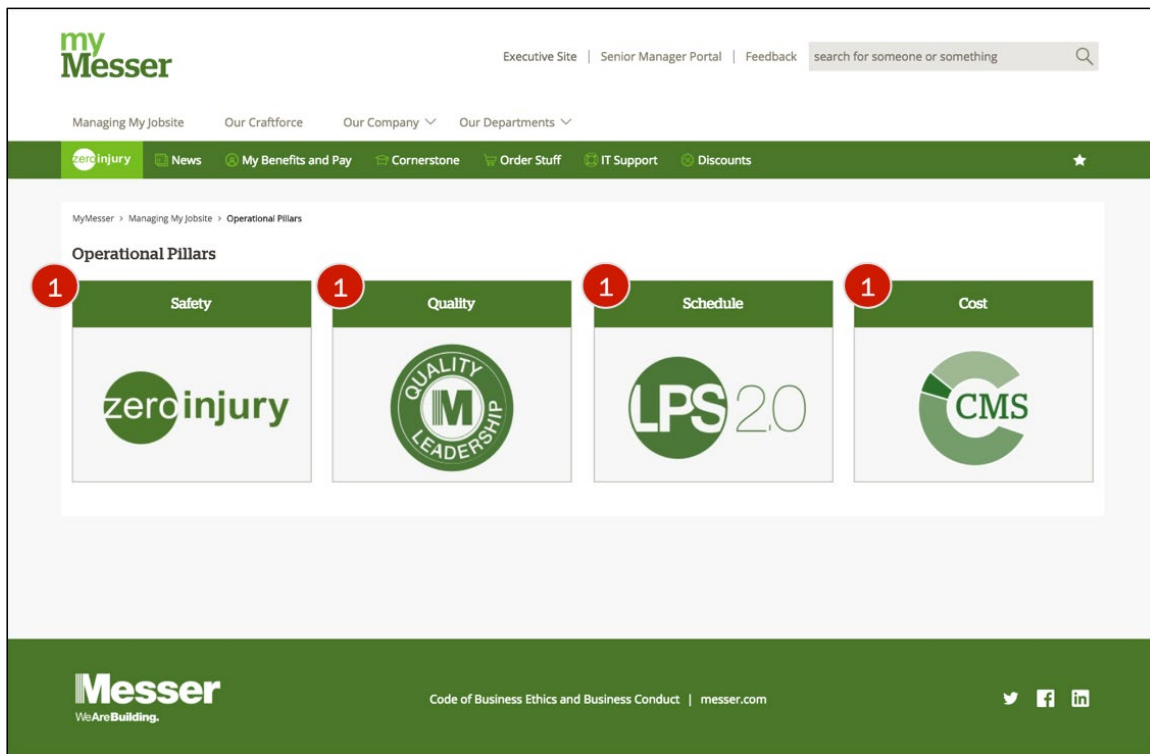
Pictured: Messer Construction Co. Intranet SERP. Filters help employees control their search results.

SERP, Highlights

SharePoint Enterprise search coupled with custom search filtering and refinement features make searching on MyMesser a powerful experience.

- 1. Filters:** User can select any, all, or none of the checkboxes in the left section of the SERP, which includes choices for *Result type*, *Content type*, and *Author*. They can also choose to see everything (the default view) or click the *People* link under the search field to see only people related to the search query.
- 2. Date:** To choose results within a date range, employees can use the slider feature.
- 3. Query:** The SERP shows the search term, reminding users of their query and making it easy to adjust it if need be.
- 4. Hover:** Hovering over a result displays a mini-version of the page that the link leads to. Beyond the results itself—with the title, description, type, and source—this mini view of the page not only helps employees decide if the result is the one they want, but it can also give users answers without their needing to leave the SERP. There's great potential for users to find what they want quickly using this SERP.

Pillars



Pictured: Messer Construction Co. Intranet Pillars. This page acts as a great reminder of the company's *Operational Pillars* and provides easy access to information about each.

Pillars, Highlights

The *Managing My jobsite* menu link leads to a page of the company's four operational pillars.

- 1. Sections:** The four sections on this page link to tips on *Safety*, *Quality*, *Schedules*, and *Cost*. Safety and quality are the highest priorities at Messer, so they appear first on this page.

News

myMesser

Executive Site | Senior Manager Portal | Feedback

search for someone or something

Managing My Jobsite

Our Craftforce

Our Company

Our Departments

zero injury

News

My Benefits and Pay

Cornerstone

Order Stuff

IT Support

Discounts

EDIT LINKS

MyMesser > Charlotte Region is Living ...

1

Charlotte Region is Living Our Community Report

04-04-2018

2



3

Annually, Messer issues our [Community Report](#) to provide a year-in-review summary of the non-profit investments we make with our time, dollars and service.

Starting this month, MyMesser will feature a monthly series called Living Our Community Report to give you a deeper look at the great Messer brings to the communities throughout our regions. Up first is a focus on [Renaissance West Community Initiative \(RWCI\)](#) in Charlotte, NC.

RWCI is an initiative tackling the barriers to upward mobility and changing generational poverty. It includes over 27 acres of redeveloped land that has apartments, townhomes, single-family homes, senior living and more with a variety of full pay to subsidized living. RWCI also has a K-8 school and a new child development center called [The Howard Levine Child Development Center](#).

Charlotte Region Leader Steve Keckels serves on the board for RWCI and helped drive these achievements. The Center named a conference room for Messer in recognition of Steve's efforts: Messer Construction Co. Conference Room 202.

Read more about the Center's opening event, the literal Joy (see photo above) that jumped into Steve's arms and his advice on the secret to community engagement in his recent [LinkedIn post](#). It's a great story to share with your network on LinkedIn. If you don't have a LinkedIn account, [you can view the story on messer.com](#).

Messer

We Are Building.

Code of Business Ethics and Business Conduct | messer.com



Pictured: Messer Construction Co. Intranet News. Inline links in news articles help users find related content.

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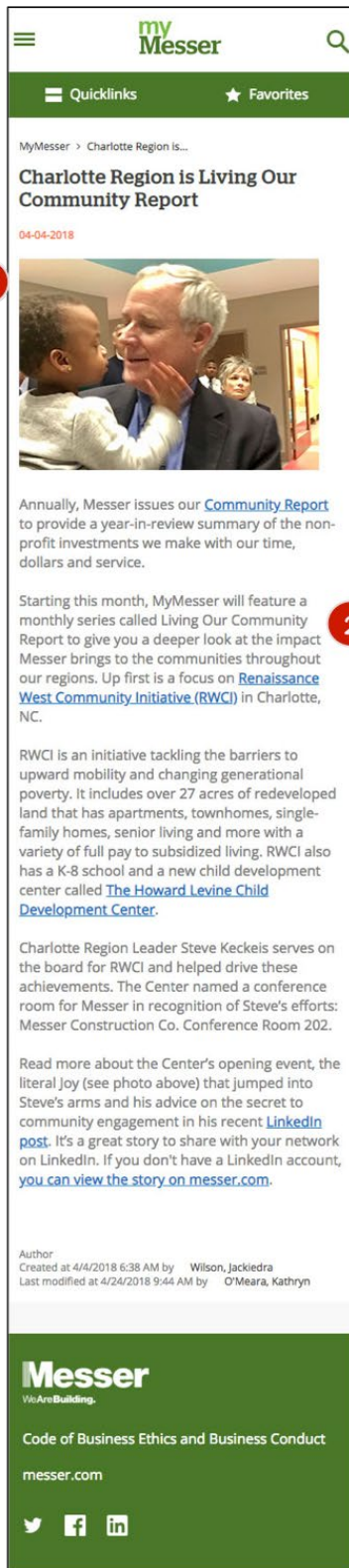
WWW.NNGROUP.COM

603

News, Highlights

News is very popular on MyMesser. Employees are encouraged to suggest news topics, which helps ensure the content interesting and speaks to a wide audience. News page views are also boosted by a biweekly newsletter, *In case you missed it*. This includes the news articles, announcements, and social media headlines posted within the past two weeks. The newsletter includes only a few sentences, rather than the full article, but a link to the news story drives readers directly to the article page on MyMesser.

- 1. **Headline:**** The article title is large, clear, and appears at the top of the page.
- 2. **Photo:**** A related image adds a human angle (or some other depth) to the story.
- 3. **Links:**** The blue underlined in-line links are information-bearing words. The style makes them easy to pick out when scanning. The link content helps users decide whether or not they want to click.



News, Mobile

Pictured: Messer Construction Co. Intranet Mobile News. Narrow columns of text in articles are easy to read on mobile devices.

Mobile News Highlights

The article layout is slightly different on mobile.

1. Photo: The photo is resized and smaller on mobile.

2. Narrow Column: The narrow column width makes the article text easy to read.

Process

The screenshot displays the Messer Construction Co. Intranet interface. At the top, the 'my Messer' logo is on the left, and navigation links for 'Executive Site', 'Senior Manager Portal', 'Feedback', and a search bar are on the right. Below this is a green navigation bar with links: 'Managing My Jobsite', 'Our Craftforce', 'Our Company', 'Our Departments', 'zero injury', 'News', 'My Benefits and Pay', 'Cornerstone', 'Order Stuff', 'IT Support', and 'Discounts'. A left sidebar contains a 'Home' section with a dropdown menu for 'Internal Communication' (marked with a red circle '2') listing steps like 'Develop the Initiative Pitch', 'Develop the Message and Gain Buy-In', 'Create Launch Plan', 'Beta Launch', 'Refine Approach', 'Launch', 'Refine and Repeat', 'Our Market Segments', and 'WorkZone'. The main content area, titled 'Internal Communication Process at a Glance' (marked with a red circle '1'), shows a 'View Steps' button and a list of process steps: 'Develop the Initiative Pitch' (with sub-points: Define the plan elements, Vet through internal systems), 'Develop the Message and Gain Buy-In' (with sub-points: Propose launch and communication plan to project or initiative team, Include proposed schedule, goals and measures), 'Create Launch Plan' (with sub-points: Opportunity for input and/or objections, Focus groups, Long term and short term gain for employees, Define measurable results that support success), 'Beta Launch' (with sub-points: Create options, Seek feedback), 'Refine Approach' (with sub-point: Present to project and/or initiative team), 'Launch' (with sub-points: Multi-channel launch, Education and training, Feedback), and 'Refine and Repeat' (with sub-points: Multi-channel launch, Education and or training, Feedback). At the bottom of the main content area, there is a question about quality best practices and a link to 'Contact Nick'. The footer features the 'Messer WeAreBuilding.' logo, a link to the 'Code of Business Ethics and Business Conduct', the website 'messer.com', and social media icons for Twitter, Facebook, and LinkedIn.

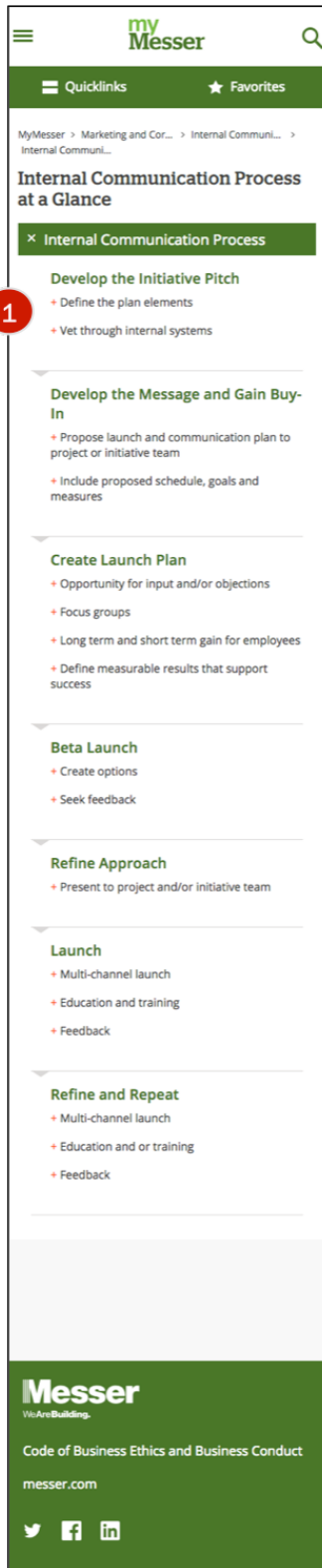
Pictured: Messer Construction Co. Intranet Process Areas. Process areas show an overview of the steps and then provide a menu so users can read the details of each step in the process.

Process, Highlights

Documenting processes at organizations ensures that any employee who needs to know how to do something can find the correct, most recent steps. Process documents increase confidence among employees and consistency across their work. They also help employees cover for each other when someone is out of the office. Finally, they give an overview to employees who might not need the details, but who could benefit from knowing the basic steps involved in getting a task done.

MyMesser includes process documents to make them easily accessible to everyone. The *Internal Communications Process* is one example.

- 1. Overview:** Before getting into the nitty gritty, users are offered a page that includes an overview of the process steps. Each step has a title and a few related details.
- 2. Menu of steps:** The links in the grey box on the left side of the page display each step as a link. When clicked, the links open the page with the details of the associated step in the process.



Process, Mobile

Pictured: Messer Construction Co. Intranet Mobile Process Overview. On mobile, the overview shows the steps and a few details, and is arranged vertically to fit the screen.

Process, Mobile Highlights

As on the desktop, the mobile screen shows an overview of the process, but the left-side menu was removed due to screen space constraints.

1. Steps: Steps and details are easy to read, with dark text on a white background and concise language.

2. Link: The green step name is a link that leads to the details page for that step.

Craftforce Development

The screenshot displays the 'myMesser' intranet interface, specifically the 'Craftforce Development' section. The page is organized into several key areas:

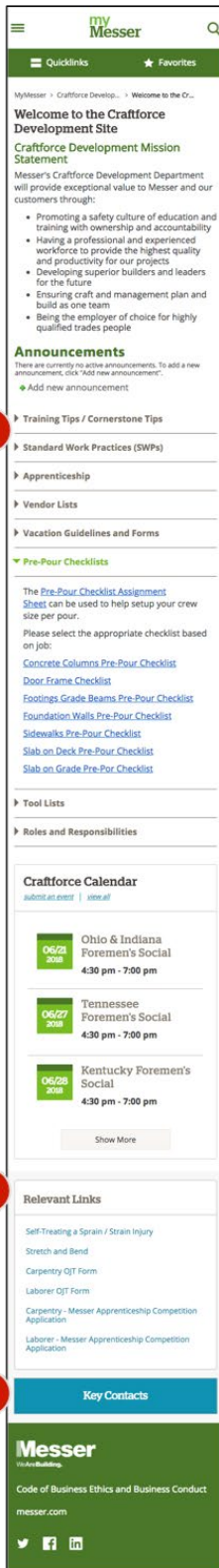
- Header:** Includes the 'myMesser' logo, navigation links for 'Executive Site', 'Senior Manager Portal', 'Feedback', and a search bar. Below this is a secondary navigation bar with links like 'Managing My Jobsite', 'Our Craftforce', 'Our Company', and 'Our Departments'.
- Left Sidebar (Callout 2):** A vertical menu with options: 'Home', 'Craftforce Development Documents', 'Craftforce Managers', and 'Foremen'.
- Main Content Area:**
 - Callout 1:** Points to the 'Welcome to the Craftforce Development Site' header and the 'Craftforce Development Mission Statement'.
 - Callout 3:** Points to the 'Announcements' section, which currently shows no active announcements.
 - Callout 4:** Points to a list of resources including 'Training Tips / Cornerstone Tips', 'Standard Work Practices (SWPs)', 'Apprenticeship', 'Vendor Lists', 'Vacation Guidelines and Forms', 'Pre-Pour Checklists', 'Tool Lists', and 'Roles and Responsibilities'.
 - Callout 5:** Points to the 'Craftforce Calendar' section, which lists upcoming events: 'Ohio & Indiana Foremen's Social' (06/21/2018), 'Tennessee Foremen's Social' (06/27/2018), and 'Kentucky Foremen's Social' (06/28/2018), all from 4:30 pm to 7:00 pm.
- Right Sidebar:**
 - Callout 6:** Points to the 'Relevant Links' section, which includes links for injury treatment, forms, and apprenticeship applications.
 - Callout 7:** Points to the 'Key Contacts' section, specifically the 'Craftforce Development' contact block.
- Footer:** Features the 'Messer' logo with the tagline 'WeAreBuilding.', a 'Code of Business Ethics and Business Conduct' link, and social media icons for Twitter, Facebook, and LinkedIn.

Pictured: Messer Construction Co. Intranet *Craftforce Development*. The company's skilled trade employees, known as the *Craftforce*, have their own special section on MyMesser where they can access pertinent resources and contacts.

Craftforce Development, Highlights

While Messer's Craftforce employees can take advantage of much of the information on MyMesser, they especially benefit from the distinct section created for them and related to their work tasks.

- 1. Mission:** Employees are reminded of the Messer values, including safety, professionalism, and building craft superiority. The subheading is green and easy to scan to, while bulleted text makes the individual points digestible.
- 2. Menu:** The links in the grey menu area on the left lead to development documents and information for managers and foremen.
- 3. Announcements:** Users can add announcements of benefit to the Craftforce. This is a great way for craftspeople to keep one another apprised of new developments.
- 4. Tips and forms:** The core checklists and resources appear in this section. Here, the Craftforce can find almost any process information in a few clicks.
- 5. Calendar:** The calendar lists current events, the date, and the time. Clicking an item leads to the details page. Employees can submit events or view the list of all events.
- 6. Additional links:** Other important links that are not part of the core checklists appear in the *Relevant Links* section in the upper right of the page. Here, Craftforce employees can learn about everything from treating their own injuries to upcoming apprenticeship competitions.
- 7. Contacts:** The *Key Contacts* section in the right rail leads to that names and contact information of people who can help Craftforce employees with internal processes, working with clients, or emergencies.



Craftforce Development, Mobile

Pictured: Messer Construction Co. Intranet *Craftforce Development Mobile View*. Craftforce employees work in the field, and they can use their mobile devices to access pertinent resources and contacts.

Craftforce Development, Mobile Highlights

It's especially important for Craftforce employees to have access to their MyMesser section via mobile devices.

- 1. Tips and forms:** Having processes and forms available on mobile is key for these employees, as they work on job sites. Sections are large and easily tappable. The selected section's title changes from black to green, and the links appear below. Document links are blue and underlined—the most traditional and recognizable signifiers.
- 2. Priority:** Except for the left-side menu, all the same elements appear on mobile as appear on desktop. The right rail does a column drop on mobile, as seen here in the *Relevant Links* and *Key Contacts* sections.

Discounts

myMesser

Executive Site | Senior Manager Portal | Feedback | search for someone or something

Managing My Jobsite | Our Craftforce | Our Company | Our Departments

zero injury | News | My Benefits and Pay | Cornerstone | Order Stuff | IT Support | Discounts

EDIT LINKS

MyMesser > Discounts

Discounts

1 Reds Tickets Thru 4/26/18:
2 Special discounts for the remainder of the month!

CSO Concert Tickets:
35% off tickets at Music Hall with promo code:

Ballet Tickets:
20% off tickets at Music Hall and the Aronoff using promo code:

TicketsatWork:
Attractions and Events offers, code:

Great Wolf Lodge:
Up to 30% off at select locations, code:

The Beach Waterpark: Messer
Adult and Child discounts using code:

General Motors
Discounts on select new GM vehicles

Tire Discounters
Show business card for discounted service on work or personal vehicle

Verizon
15% off service and 25% off accessories

Digital Doc Repair
15% off phone and tablet repair

Hyatt Cincinnati
Discounted room rate

3 For more information contact Kim Spangler or Scott Grothaus (Technology Discounts).

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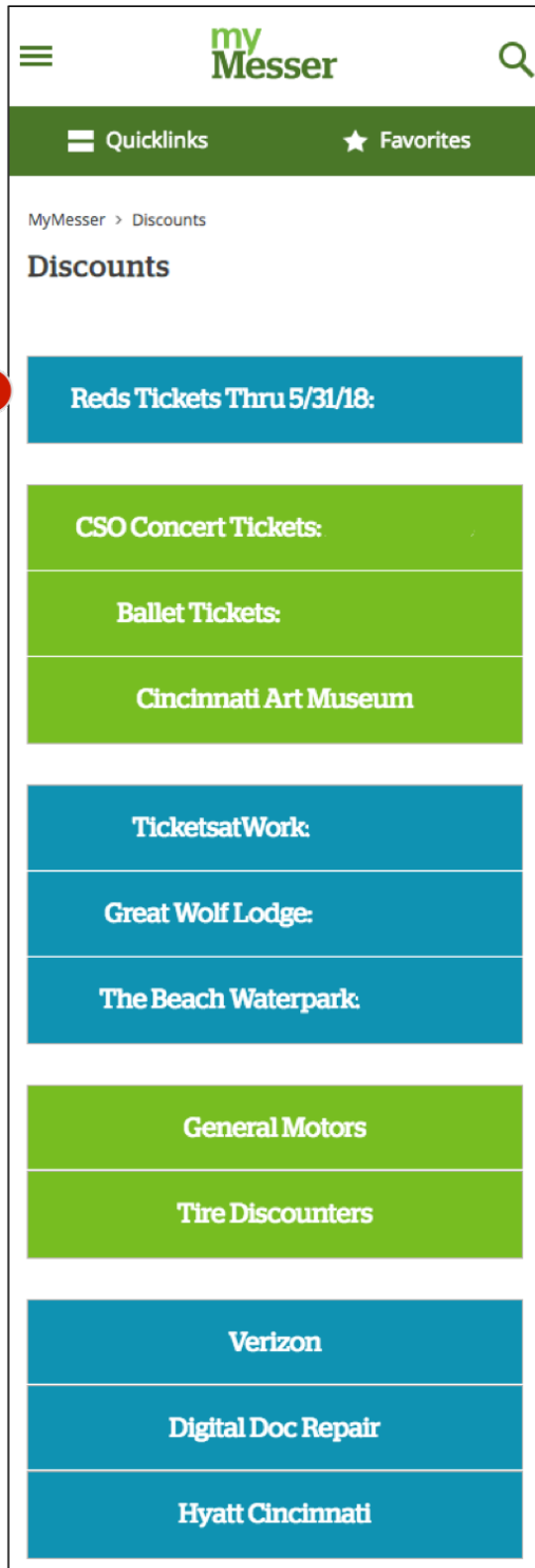
Twitter Facebook LinkedIn

Pictured: Messer Construction Co. Intranet *Discounts*. Discounts are an unexpected employee benefit accessible on MyMesser.

Discounts, Highlights

Discounts from various companies are a fun, money-saving benefit for employees, with reductions on everything from ballet tickets to automobiles.

1. **Item:** The items employees can buy at a discounted rate each appear in a colored card, with the name of the item at the top.
2. **Description:** The amount of the discount (or whatever information is known) appears in the card below the title.
3. **Contact:** Key contact names appear as links at the bottom of the page in case employees need help with the discounts.



Discounts, Mobile

Pictured: Messer Construction Co. Intranet *Discounts Mobile*.

Employees can view available discounts using their mobile devices.

Discounts, Mobile Highlights

Discounts are also available on mobile, which is very convenient for employees when they are out shopping or shopping from home.

1. Discounted items: The items with discount offers are listed in colored buttons on mobile. The description is not shown due to space constraints.

Human Resources

The screenshot displays the MyMesser Human Resources intranet page. At the top, the MyMesser logo is on the left, and navigation links for Executive Site, Senior Manager Portal, Feedback, and a search bar are on the right. Below this is a green navigation bar with links: Managing My Jobsite, Our Craftforce, Our Company, Our Departments, zeroinjury, News, My Benefits and Pay, Cornerstone, Order Stuff, IT Support, and Discounts. A sidebar on the left (callout 4) lists: Home, Benefits, Payroll, Policies & Compliance, Recruiting and Onboarding, Wellness, 401(k) Savings Plan, and LiveHealth Online. The main content area (callout 1) is titled 'Welcome to the Human Resources Site' and includes an 'HR Mission Statement' and a list of core services. A 'How Can We Help You?' section (callout 2) provides links for various HR needs. Below that is an 'HR Calendar' (callout 3) showing Memorial Day, Independence Day, and Labor Day as all-day events. A 'Relevant Links' section (callout 5) on the right lists links like Fidelity 401(k) Account and Recruiting and Onboarding Process. A 'Key Contacts' section (callout 6) at the bottom right highlights the Human Resources contact. The footer features the Messer logo, a code of ethics link, and social media icons.

Pictured: Messer Construction Co. Intranet Human Resources. The HR section of MyMesser consolidates information about benefits and much more.

Human Resources, Highlights

Benefits and policies are a staple for most intranets, and MyMesser is no different in that respect. The site boasts a robust HR section. The section's structure follows that of all department pages, which helps users easily locate the same type of information on all department pages.

1. **Mission:** HR's role—including its mission—appears at the top of the HR section page, informing (or reminding) employees what the HR team can do to help them.
2. **Top HR tasks:** Common issues that employees need answers about are listed in the center of the page. Among the links are those related to recruiting, vacation, and benefits to help users serve themselves.
3. **Calendar:** Holidays, which are part of employee benefits, appear in the calendar section at the bottom of the page.
4. **Menu:** The left-side menu links call out the HR area's sections.
5. **Related Links:** The *Related Links* section in the right rail leads to more information; it is one more way the site helps users discover content they might want to explore.
6. **Breadcrumbs:** Aside from the homepage, every page of MyMesser includes breadcrumbs to indicate where the selected page lives in the site structure.

Marketing

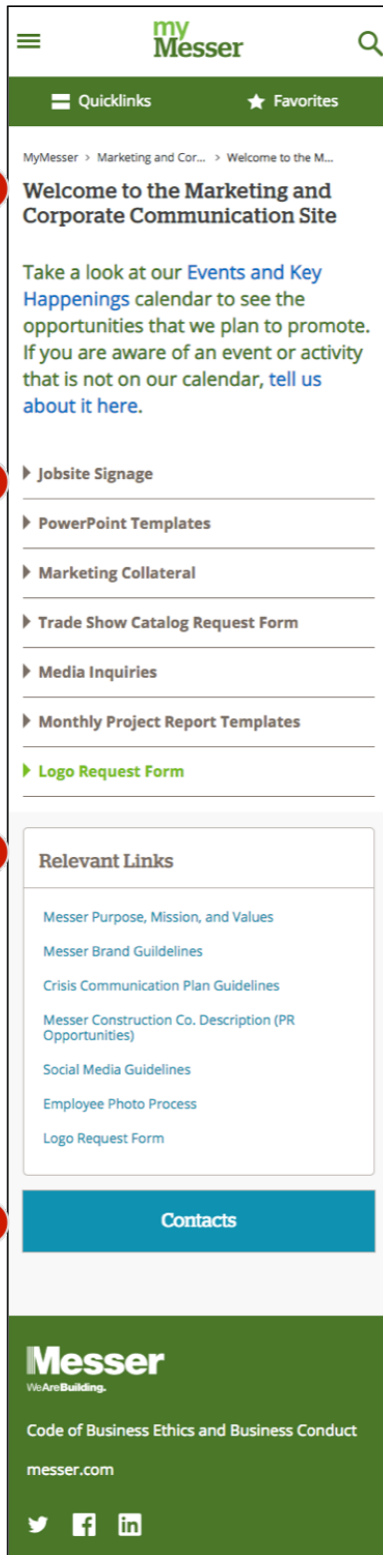
The screenshot displays the Messer Construction Co. Intranet Marketing Department Page. The page layout includes a green header with the 'my Messer' logo and navigation links such as 'Executive Site', 'Senior Manager Portal', 'Feedback', and a search bar. Below the header, a green navigation bar contains links for 'Managing My Jobsite', 'Our Craftforce', 'Our Company', and 'Our Departments'. A sidebar on the left, labeled 'Internal Communication', lists various tasks like 'Develop the Initiative Pitch', 'Develop the Message and Gain Buy-In', 'Create Launch Plan', 'Beta Launch', 'Refine Approach', 'Launch', 'Refine and Repeat', 'Our Market Segments', and 'WorkZone'. The main content area is titled 'Welcome to the Marketing and Corporate Communication Site' and features a welcome message, a 'Jobsite Signage' section, a 'PowerPoint Templates' section, and a 'Marketing Collateral' section with links to 'Annual Report', 'Community Report', 'Region Brochures', and 'Market Segment Overviews'. A right sidebar contains 'Relevant Links' and a 'Contacts' section. The footer includes the Messer logo, a code of ethics link, and social media icons.

Pictured: Messer Construction Co. Intranet Marketing Department Page. The marketing department's section of MyMesser provides templates, forms, and other resources for and provided by marketing.

Marketing, Highlights

Like the HR department's main page, the main *Marketing and Corporate Communications* page has an introduction, top areas, and relevant links.

1. **Welcome:** A short statement about the department, complete with inline links to more information, gives a concise department overview.
2. **Links:** More important links are offered as an expandable list, collapsed by default. Each top-level item exposes links to related pages.
3. **Menu:** Task-based menu links appear on the left.
4. **Contacts:** A *Contacts* section at the bottom of the right rail leads to a page about Marketing Department professionals.



Marketing, Mobile

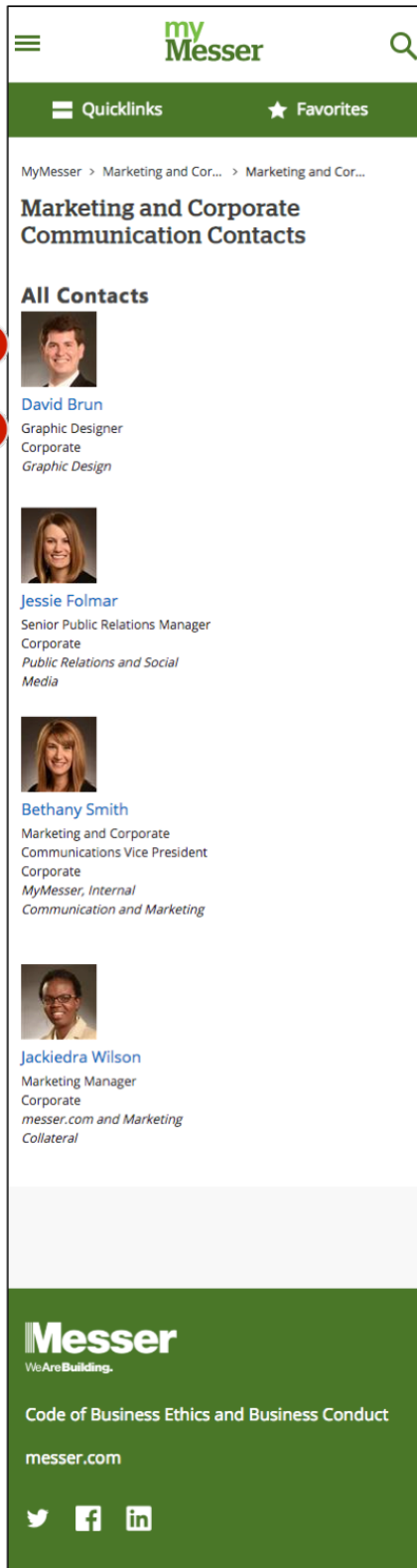
Pictured: Messer Construction Co. Intranet Marketing Department Page Mobile View.

The marketing department's section of MyMesser offers the same items on mobile (marketing templates, forms, and resources) as on desktop.

Marketing, Mobile Highlights

Like the HR department's main page, the marketing main page displays an introduction, top areas, and relevant links.

- Welcome:** A short statement about the department is easy to consume on mobile.
- Links:** Important links are offered as a list and are easy to read and tap. The links include information and resources for the marketing team, as well as marketing materials for employees in other departments. For example, managers working onsite who need to order signs can do so through *Jobsite Signage*.
- Priority:** *Relevant Links* drop from the right rail on desktop to below the top tasks links on mobile.
- Contacts:** A *Contacts* button leads to a page of key contacts for the department.



Department Contacts, Mobile

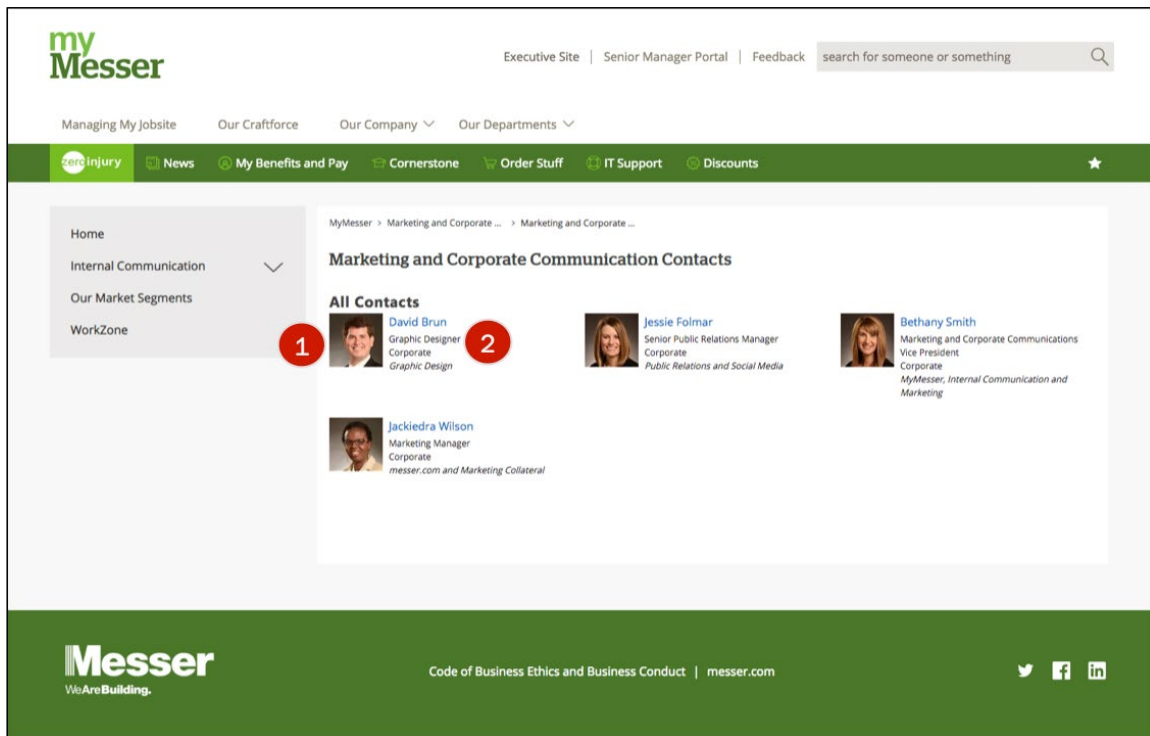
Pictured: Messer Construction Co. Intranet Department Contacts—Mobile View. Each department lists its key people and contact information.

Department Contacts, Mobile Highlights

Clicking the *Contacts* button opens a page listing that department's key contacts.

1. **Photo:** A photo of each person helps employees put a name to the face, and vice versa.
2. **Information:** The *Contacts* area includes a photo, name, job title, and department for each person. The name link leads to the person's O365 profile page.

Department Contacts



Pictured: Messer Construction Co. Intranet Department Contacts. On desktop, the contacts are listed horizontally.

Department Contacts, Highlights

Contact pages viewed on desktop use horizontal space on the page.

- 1. Photo:** A photo of each person helps employees put a name to the face, and vice versa.
- 2. Information:** The contacts area includes each person's photo, name, job title, and department. The name link leads to the person's O365 profile page.

Region

The screenshot displays the 'my Messer' intranet interface for the Louisville Region. The top navigation bar includes links for 'Executive Site', 'Senior Manager Portal', 'Feedback', and a search bar. Below this, a secondary navigation bar lists various resources like 'Managing My Jobsite', 'Our Craftforce', 'Our Company', 'Our Departments', 'Zero Injury', 'News', 'My Benefits and Pay', 'Cornerstone', 'Order Stuff', 'IT Support', and 'Discounts'. The main content area is divided into three numbered sections: 1. 'Welcome to the Louisville Region' which provides contact information (11001 Plantside Drive, Louisville, KY 40299), office phone/fax numbers, and a brief description of the company's work. 2. 'Announcements' featuring a 'Happy Birthday To....' post by Smith, Georgia, dated 4/30/2018, listing May birthdays for James Lindsey, Samantha Fox, and Brady Combs. 3. 'Louisville Events' listing three upcoming events: Memorial Day (05/28/2018, All Day Event), LOU-Social (05/29/2018, 4:30 pm - 7:00 pm), and Louisville Mid-Year Report Meeting (06/07/2018, 5:00 pm Thu - 8:00 pm Thu). A 'Show More' button is located at the bottom of the events section. On the right side, there are two sidebars: 'Relevant Links' with links to iSqFt, e-Builder, Norton CM system, Midwest Toxicology Services, Verify COATS cards, and Louisville Business Partner Form; and 'Key Contacts' listing Louisville. The footer features the Messer logo with the tagline 'WeAreBuilding.', the Code of Business Ethics and Business Conduct link, the website URL 'messer.com', and social media icons for Twitter, Facebook, and LinkedIn.

my Messer

Executive Site | Senior Manager Portal | Feedback | search for someone or something

Managing My Jobsite | Our Craftforce | Our Company | Our Departments

Zero Injury | News | My Benefits and Pay | Cornerstone | Order Stuff | IT Support | Discounts

Home
FAQ

MyMesser > Louisville > Welcome to the Louisville ...

1 Welcome to the Louisville Region

11001 Plantside Drive
Louisville, KY 40299

Office phone: (502) 261-9775
Office fax: (502) 261-9705

Messer provides unmatched leadership of complex, commercial construction projects specializing in aviation, health care, higher education, industrial, and life sciences. For more than 80 years, our transformational investment in people, communities and innovative building solutions has enhanced the landscape of the places we call home.

2 Announcements

Happy Birthday To....

by Smith, Georgia 4/30/2018 10:05 AM

May Birthdays:

May 11 James Lindsey
May 12 Samantha Fox
May 25 Brady Combs

(More Announcements...)

◆ Add new announcement

3 Louisville Events

[submit an event](#) | [view all](#)

05/28/2018 [add to calendar](#)

All Day Event Memorial Day - Office Closed

05/29/2018 [add to calendar](#)

4:30 pm - 7:00 pm All, The Social Committee would like to invite everyone to hang out, catch up, and unwind a little at Brick H

06/07/2018 [add to calendar](#)

5:00 pm Thu - 8:00 pm Thu

Show More

Messer
WeAreBuilding.

Code of Business Ethics and Business Conduct | [messer.com](#)

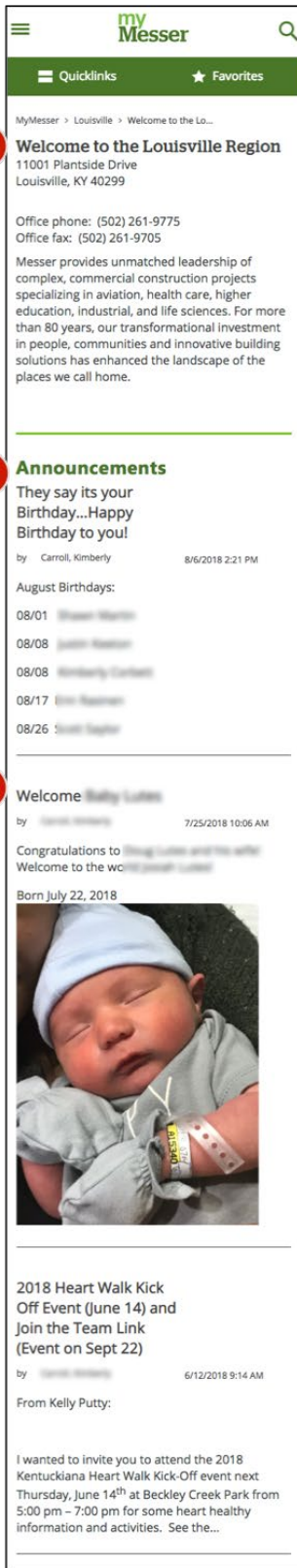
Twitter Facebook LinkedIn

Pictured: Messer Construction Co. Intranet Region Sections. Sections for different regions focus on location-specific events and people.

Region, Highlights

Anyone visiting a different Messer location can go to that region's section of MyMesser for a glimpse into its current events and administrative information. Regional pages follow a layout similar to that of the department pages.

- 1. Welcome:** The top section provides the address, phone and fax numbers, and a key sentiment for the region.
- 2. Announcements:** Birthdays and other important events for employees at the location are listed for all to see. This is a nice team-building feature.
- 3. Events:** Events are listed to bring together the employees from the location. This is a great way to entice employees to participate in events together and bond with one another.



Region, Mobile

Pictures: Messer Construction Co. Intranet Regions Sections—Mobile View. Sections for different regions are accessible on mobile.

Region, Mobile Highlights

Travelers to other locations are grateful for the mobile access.

1. **Welcome:** The top section provides the address, along with phone and fax numbers.
2. **Announcements:** Birthdays and other important events are showcased.
3. **Events:** Volunteer events get employees involved in helping the local community. Pertinent info is easy to locate on mobile. Even babies born to employees are announced here, complete with baby photos.

Events

The screenshot displays the 'myMesser' intranet interface. The top navigation bar includes links for 'Executive Site', 'Senior Manager Portal', 'Feedback', and a search bar. Below this, a secondary navigation bar lists various services like 'Managing My Jobsite', 'Our Craftforce', 'Our Company', 'Our Departments', 'Zero Injury', 'News', 'My Benefits and Pay', 'Cornerstone', 'Order Stuff', 'IT Support', and 'Discounts'. The main content area is titled 'MyMesser > Events' and features a list of events. The first event, 'Cincinnati Project Manager's Meeting', is highlighted with five red numbered callouts: 1 points to the event title, 2 to the date and time, 3 to the location, 4 to the region and category, and 5 to the 'Add To Calendar' link. A mobile view overlay on the right shows the same event information in a compact format, also with red numbered callouts 1 through 4. The footer contains the 'Messer' logo, the tagline 'WeAreBuilding.', and the 'Code of Business Ethics and Business Conduct' link.

Events
Cincinnati Project Manager's Meeting
Wed 05/23 3:00 pm - 5:00 pm
Location: Cincinnati Region Office
Region: Cincinnati Category: Meeting
[Add To Calendar](#)

Events
Cincinnati Project Manager's Meeting
Wed 05/23 3:00 pm - 5:00 pm
Location: Cincinnati Region Office
Region: Cincinnati Category: Meeting

Messer
WeAreBuilding.
Code of Business Ethics and Business Conduct | messer.com

Messer
WeAreBuilding.
Code of Business Ethics and Business Conduct
messer.com
Twitter Facebook LinkedIn

Pictured: Messer Construction Co. Intranet Events. Users can easily add events to their personal calendars.

Events, Highlights

Messer encourages employees to spend time together. The events listed on MyMesser help employees find different happenings that they might want to attend. Each event has a page that lists its details, and all of the following are included on both desktop and mobile, except for the final item.

- 1. Title:** The event name is listed first.
- 2. Time:** The day of the week, date, and time of the event are listed next in red text.
- 3. Location:** The location for the event appears in black text.
- 4. Category:** For users who search for events by event type, the *Category* assignment may help; it can also help users interested in an event get an idea of what type of event it is.
- 5. Add to Calendar:** On desktop, users can click the *Add to Calendar* link at the bottom of the page to add the event to their personal calendar.

DESIGN PROCESS AND USABILITY WORK

UX Discovery

The design team held a four-week discovery phase in which it conducted UX research and analysis that helped it decide on both the site design and its content; it also helped the team determine a comprehensive set of requirements derived from the needs of both users and stakeholders.

This research fed into the ultimate project goal: to help users find what they are looking for more easily. Discovery activities also helped promote transparency and create buy-in, which ultimately resulted in a high adoption rate for the new, more user-centric intranet.

Research Methods

This initial project phase comprised several research activities, including:

- **Creating a vision:** Cardinal Solutions, the company's agency partner, met with stakeholders to create a *Solution Vision* document. During this session, they discussed the challenges with the legacy intranet and identified specific success criteria for the new site. The *Solution Vision* was referenced throughout the project and served as a tool that the team could return to again and again to keep project goals at the fore as they moved through the design and build phases that followed.
- **Stakeholder focus groups:** The team used conversation-style meetings to help identify usability and UX objectives and rather than focusing on current features or functionality specifically. The main goal of the discussions was to try to understand the culture, business process challenges, and expected project ROI.
- **User interviews:** User interviews were focused on helping the team learn how end users interacted with the legacy intranet, including trying to identify key tasks, motivations, and pain points. The information gleaned from these interviews provided the team with neutral, user-centric data that it used to inform feature preferences, IA, and design decisions throughout the project. This process also paved the way for improved user adoption and helped the intranet fulfill end-user expectations specifically expressed during the interview sessions.
- **User survey:** Surveys are a great way to gain wide exposure for a project with users across a company. The survey the Messer team used focused on the current portal and the systems that users interact with every day. The survey also let Cardinal Solutions reach out to a larger number of users than it had access to in the user interviews.

- **Card sorting:** Card sorts were used to help evaluate the existing IA's efficacy, as well as to discover specific information that would help the team build a user-friendly, scalable IA for the new intranet. Participants organized physical cards, sorting main, sub, and tertiary topics into categories that they felt would provide an optimal navigation experience. For users who could not participate in person, the team used Optimal Workshop, an online card-sort tool. The results of these sessions translated directly to a site map that illustrated the new intranet's eventual link and page structure.
- **Task prioritization session:** The team also used a collaborative activity to help identify and rank which individual features should take precedence over others. During this activity, each landing page task/feature set was systematically sorted by participants based on perceived usage and the level of importance users ascribed to it. These results provided a roadmap for improving the content hierarchy, as well as the hierarchy of application features, which were collected and delivered using a Task Priority Grid. This provided guidance for the layout and design phase deliverables to come.

Deliverables

Based on the insights gained through the various research activities, the team created a series of deliverables that illustrated project direction, including:

- **Findings:** The team delivered an interview findings report to all stakeholders so they could review the themes that had emerged from the workshops and comment on the proposed IA and content strategy recommendations.
- **Personas:** Personas were created from the information gathered during the user interview sessions. These personas provided (and continue to provide) a deeper understanding of end users, including their desired tasks and frustrations, and offer suggestions for improvement. These personas were used during the redesign, and they will also be used to inform future design decisions as the team continues to make changes and updates to the intranet going forward.
- **Site map:** Based on the card-sort results, Cardinal created a proposed site map, which served as the foundation for the redesigned site and improved IA.
- **Task Priority Diagram:** A Task Priority Diagram was created based on the results of the task priority exercise. It demonstrates how end users prioritize their day-to-day tasks based on frequency and value. These results help define which pieces of the UI should take precedence over others, and pointed to the individual features that should be removed. The diagram was particularly helpful in informing decisions about homepage design and also contributed to decision-making on the overall responsive design approach.
- **Landing page wireframe:** Using the collective discovery results, a new, low-fidelity blueprint was created to help the team visualize the new and improved UI components and where they would be best placed in specific page areas.

- **Design mockups:** Building on the approved wireframe, the team built a conceptual visual design mockup to showcase the design aesthetic (look and feel). Guided by usability and accessibility best practices, this visual design demonstrated how the Messer brand would be applied and extended to the landing page. Cardinal created a few homepage examples, as well as a collage of specific, consistent design elements that will eventually be part of the new design's pattern library.

Adoption and Buy-In

To gain organizational buy-in for the new site, the team recruited department and region office liaisons to contribute to focus group sessions held during the project kick-off phase. Information gathered from these sessions influenced the site structure, UX, and design throughout the entire project lifecycle. And, as the project neared the launch date, those same participants were brought back in so they could participate again, this time in user testing and design review sessions.

After the new site launched, the team conducted online training sessions and, even today, it continues to have regular check-in meetings with the liaisons to ensure continued adoption and answer questions as they arise.

As these continued efforts show, the team considers buy-in not a one-and-done exercise; it is committed to the intranet's continued growth and success as a comprehensive company tool.

Working with Outside Agencies

The Messer team worked with Cardinal Solutions Group throughout the entire lifecycle of the intranet-redesign project. The agency's participation is outlined in the table that follows:

CARDINAL SOLUTIONS GROUP	
Role	Responsibilities
SharePoint Architect	• Guided all development-related tasks and managed overall direction and health of those activities • Executed stakeholder interviews and discovery sessions to gain insight on business needs and requirements • Developed and guided vision for the overall solution • Architected technical solution • Supported SharePoint-related development and infrastructure activities
SharePoint Developer	• Developed custom functionality and implemented branding under direction of the SharePoint Architect, utilizing Microsoft best practices for SharePoint development • Developed SharePoint page layouts and web parts • Developed SharePoint apps
Business Analyst	• Documented technical requirements • Participated in all stakeholder and requirements sessions • Assisted architect in eliciting and understanding the business needs

Project Manager	• Managed all aspects of project lifecycle delivery, from initiation through close-out and transition • Drove strategic decisions and discussions relating to project priorities • Proactively worked through project issues to mitigate risk • Managed change control process • Managed project schedule and deliverables as outlined in each phase • Led requirements and scope discussions • Reported on project health throughout project • Created and executed change management, training, and communication plans
UX Architect	• Guided the overall effort for all design-related activities • Led stakeholder interviews and focus groups with users to help the team refine the design and content hierarchy • Worked with the UX designer to set a design direction and reviews visual designs
UI Designer	• Worked with the SharePoint designer to design the UI while upholding the brand standard • Applied creative, innovative techniques to help solve problems and craft an engaging interface • Prepared visual assets and developer specifications
Front-End Developer	• Programmed the UI and unique page templates using best-in-class HTML and CSS • Ensured browser compatibility and delivered code to SharePoint developers for back-end integration

GOVERNANCE

Ownership

Intranet ownership is split between the Marketing and Corporate Communications (M&CC) and the IT departments.

This shared ownership model has impacted the site in a positive way. M&CC can schedule stories, share best practices with departments and regions for their dedicated content sections, and use analytics to track and continuously improve visitor engagement. IT works behind the scenes to ensure access and content accuracy and reliability. And these teams work together on overall site governance.

INTRANET TEAM RESPONSIBILITIES	
Role	Responsibilities
MyMesser Core Team	• Manage homepage content strategy and messaging
MyMesser Governance Committee	• Clearly define roles and groups for content ownership and publishing
Department Admins	• Manage self-service content for employees and WorkZone usage and adoption
Region Admins	• Manage self-service content and event listings for regional pages and WorkZone usage and adoption

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	The URL for both the desktop and mobile experience is: www.MesserConstruction.sharepoint.com
Default Status	MyMesser is automatically shown to any Messer employee who logs on with a company device.
Remote Access	The site can be accessed via any web browser (desktop or mobile) with the user's Messer ID and password.
Shared Workstations	iPads and shared workstations are available in many company jobsite trailers and in regional offices to accommodate traveling and Craftforce employees. Every user is assigned a login.

TIMELINE

PROJECT MILESTONES	
Milestone Date	Milestone Description
May–June 2017	Design and planning
August–October 2017	Development
October 2017	User acceptance testing
November 2017	Training
December 2017	Launch
Overall redesign timeframe: 5 Months	

CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Contributors	- The M&CC team meets regularly with the department and region admin leads to identify story opportunities to feature on the homepage. The intranet team writes the content and the SMEs approve it. - Page admin leads and department members manage the content that lives on department pages. - Specific pages devoted to the construction industry's operational best practices are overseen and updated by two of the company's executives.
Contribution	MyMesser includes a <i>Submit a Story</i> option as well as a <i>Feedback</i> button to encourage employees to contribute information or insights that can then be shared with the entire company.
Training	All admins, including department and region admins, received training prior to launch; post-launch, the team holds routine check-in meetings to answer questions and share best practices.
Content Management	The M&CC team maintains an editorial content calendar to help identify communication opportunities and needs. Admins for pages beyond the homepage are responsible to ensure that their content is useful, informative, accurate, and up-to-date so that users will trust it and continue to want to read it.
Maintaining Quality	Because the site was designed to optimize UX and make it easy for people to find the information they need and collaborate with others, department pages all have the same look and feel. The team reviews analytics regularly so that it can monitor where people are going and what they are searching for and make changes as needed. The site also invites users to provide feedback via a link on the homepage.

TECHNOLOGY

TECHNOLOGY	
Category	Technology Used
Web Server Hardware and Operating System	• O365, SharePoint Online
Bug Tracking/Quality Assurance	• Visual Studio Online (VSO)
Design Tools	• InVision • Sketch • Adobe Creative Suite • Optimal Workshop • Pattern Lab
Site Building Tools	• Visual Studio • PowerShell
Content Management Tools	• Layer2
Search	• SharePoint Enterprise Search
Other Functions	• Citrix NetScaler, XenServer

ROI

The success criteria for the new Messer intranet were defined as:

- Improve accessibility and mobility
- Provide better usability
- Improve information finding through search
- Provide in-demand content at the right place and the right time
- Make the intranet the definitive source of truth for the company
- Provide document security

Messer is committed to connecting its employees and driving transparency across all company locations. It rejects the “if you build it they will come” ethos and instead takes an analytical approach to monitoring performance, gauging content traction, and making continuous improvements to the new platform.

Messer continues to work with Cardinal Solutions through a managed service agreement to make continual improvements; for example, it takes the following measures to gauge ongoing performance and user satisfaction:

- **Measure page views:** The team continues to measure page views so it can understand where users are spending their time on the site and which news stories are generating the most clicks.

- **Monitor engagement:** It's important to monitor engagement of the company's Craftforce employees versus its traditional office staff to ensure the intranet is meeting the needs of both audiences and track whether they're gaining or losing users over time. For example, in June 2018, the intranet had 200 more page views than average each day for the first time since relaunching the site. The increase is attributed to a new biweekly *In case you missed it* email blast that is sent to employees; it provides a round-up of news articles, content, and social media headlines posted on the intranet within the previous two weeks. This email also drives employees to MyMesser to read important company announcements. In the past, the CEO would have emailed this company information to all employees. Now, the CEO still emails employees, but instead of including the full message in the email, readers receive two- to three-sentence messages that direct them to *read more* via a hyperlink to the story page on MyMesser that contains the full announcement.

LESSONS LEARNED

Messer Construction Co., like many companies, chose to work closely with an agency partner throughout its intranet-redesign project. Although that partnership's success shows in the pages of its new intranet design, such good outcomes can make a hard job look deceptively easy. However, it's not always easy to choose a great agency—and it's even harder to make the collaboration work smoothly. Messer scored high on both these points, and its team has lessons to share with other companies considering this type of approach:

- **Choose agency partners with care.** "We learned early on that having a partner that simply understood SharePoint was not enough. We needed a partner that could help us as an organization connect with our users to understand their perspective on what a new employee portal could do to help them stay better informed and do their jobs more efficiently and effectively. Cardinal brought a unique combination of user experience skills along with deep technical expertise that allowed us to understand the needs and wants of our employees, and then determine the best technical approach to deliver what they needed. Starting with user experience activities such as focus groups, stakeholder interviews, card sorts, and task priority exercises provided our employees the opportunity for their voices to be heard, while also aligning what the business stakeholders hoped to accomplish with the new portal."

- **UX acumen is just as important as technical expertise.** “Much like the lesson learned above, we would recommend engaging a partner like Cardinal Solutions that not only understands the technical aspects of architecting an employee portal but also has the requisite user experience capabilities to truly drive out what employees need and want. The discovery and planning activities that Cardinal led at the project’s inception truly established a foundation for our future employee portal because it incorporated the voice of the end user. The IA, content strategy, key web parts, etc. were established through a highly collaborative process with both end users and stakeholders. The approach Cardinal utilized ensured that we would build a new experience that our employees would need and want to use while also satisfying the goals and expectations of the business sponsors.”

Angelini Holding SpA (2020)

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 Ondeï, 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, Avanaide, 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.

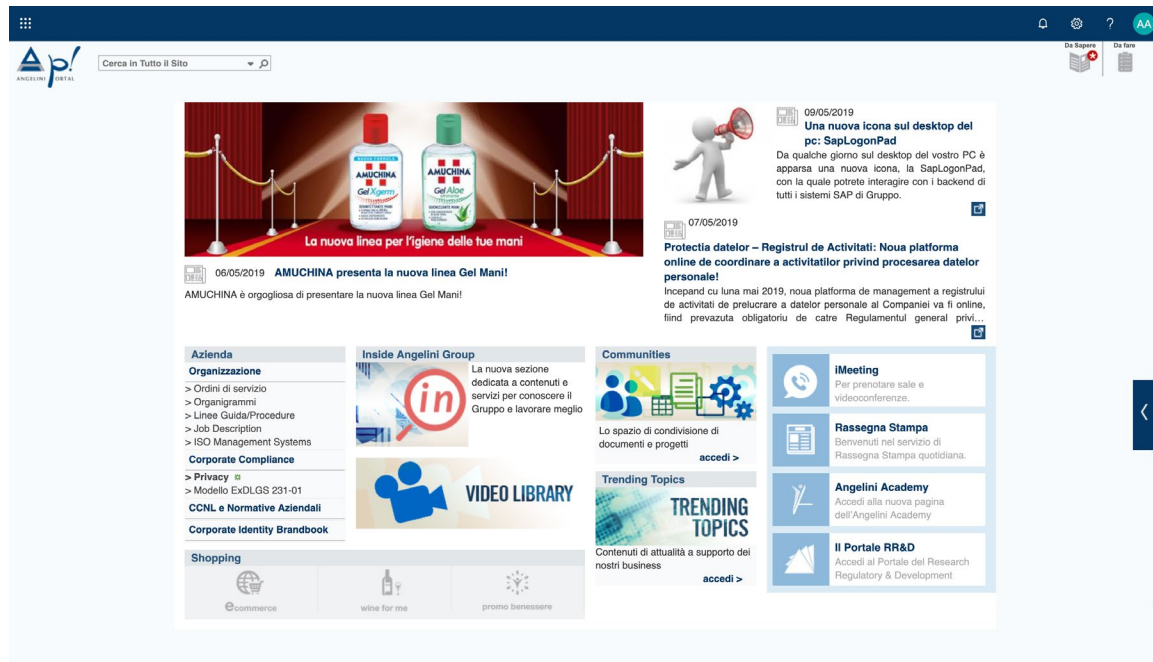
The team used design thinking and Agile methodology as the project's backbone for several reasons. First, it had to achieve tangible results in a short period of time, and Agile cycles were deemed an efficient way to accomplish that goal. The team also chose this mix of approaches because both methodologies 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

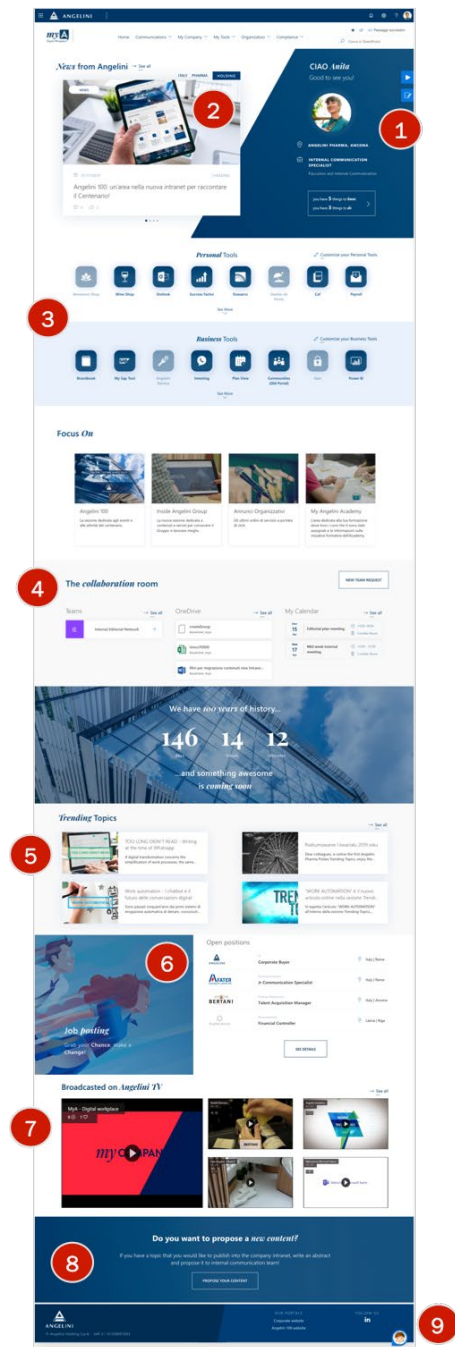
MyA is now used by 3,800 Angelini employees in 13 locations around the world. And, thanks to feedback received from the organization's top management, the intranet roadmap has been extended. When the rollout to all company divisions is completed in the coming years, MyA will reach an estimated audience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



Pictured: This shows the intranet homepage prior to the most recent redesign.

DESIGN REVIEW

Homepage



Pictured: MyA's homepage provides relevant information and tools in an organized format.

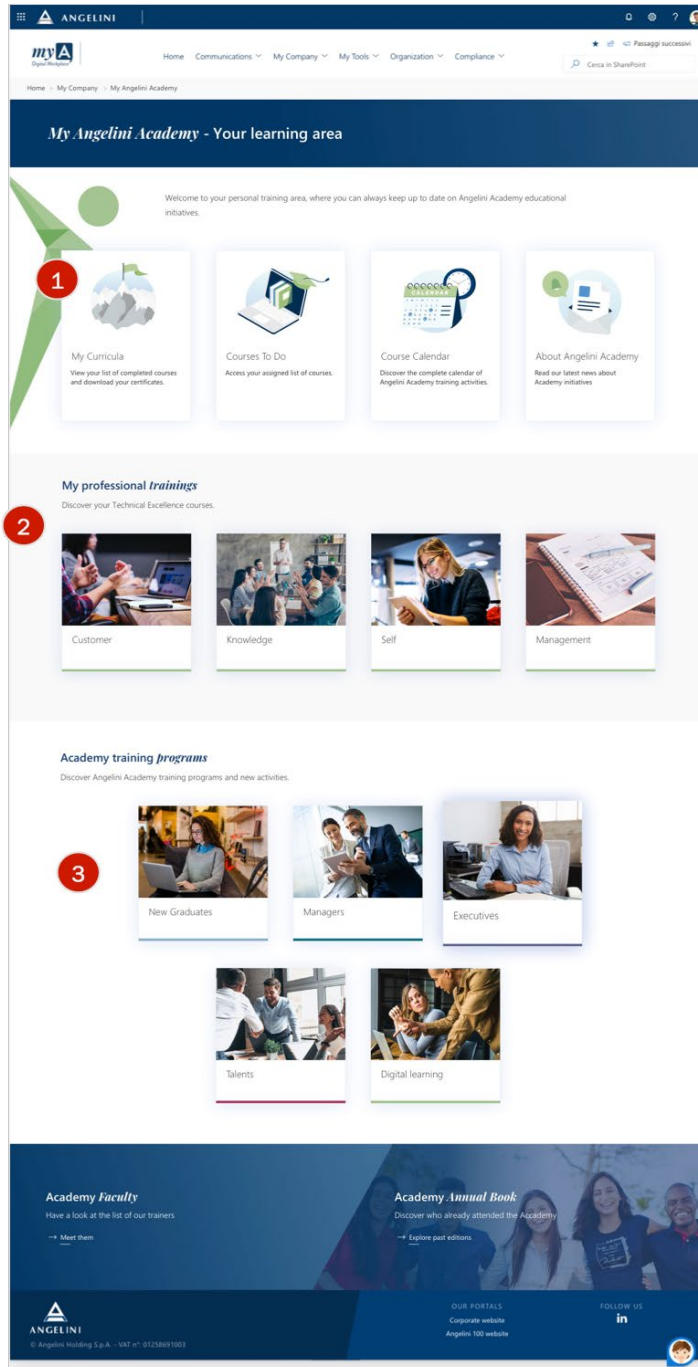
Homepage Highlights

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



Pictured: *My Angelini Academy* is the training site within MyA where users can discover courses relevant to them.

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

The screenshot shows the Angelini News Archive page. The header includes the Angelini logo and navigation links: Home, Communications, My Company, My Tools, Organization, and Compliance. A search bar is located on the right. The main content area is titled 'News Archive' and displays a grid of news cards. A sidebar on the left provides filters for Category, Location, Business, and Date. A 'SHOW MORE' button is located at the bottom of the grid.

Category

- ☒ All
- ☐ Academy
- ☐ Announcements
- ☐ Compliance
- ☐ Digital Gym
- ☐ Directive

Location

- ☒ All
- ☐ Austria
- ☐ Bulgaria
- ☐ Czech Republic
- ☐ Germany
- ☐ Greece

Business

- ☒ All
- ☐ Beauty
- ☐ Bertani Domains
- ☐ Fameccanica
- ☐ Fater
- ☐ Holding

Date

From: --/--/----

To: --/--/----

Order by: Article Date

News Cards:

- TRENDING TOPICS** (1) - 07/26/2019 - "TOO LONG DIDN'T READ" è il nuovo articolo online nella...
- SAP** - 07/30/2019 - Sap LogonPad
- DIGITAL GYM** - 07/12/2019 - Microsoft Teams, un nuovo strumento per gestire i...
- Soave Cru Tenido** - 07/24/2019 - La zonazione del Soave finisce in etichetta: via libera alle 33...
- SUMMER PARTY** - 07/24/2019 - SUMMER PARTY: el verano llega a Angelini Farmacèutica
- Il metodo classico Puiatti** - 07/22/2019 - Il metodo classico Puiatti si veste di nuovo.
- NASCE IL NUOVO PROGETTO "TENUTE SAN SISTO"** - 07/19/2019 - Nasce il nuovo progetto «Tenute San Sisto»
- ADVISORY BOARD: LÉCBA SCHIZOFRENIE – UNMET...** - 07/19/2019 - ADVISORY BOARD: LÉCBA SCHIZOFRENIE – UNMET...
- Angelini a supporto della donazione: un gesto concreto** - 07/16/2019 - Angelini a supporto della donazione: un gesto concreto

Footer:

ANGELINI
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OUR PORTALS
Corporate website
Angelini 100 website

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Pictured: MyA offers a card layout for this news page. Users can filter news items by type, date, location, and business sector.

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

ANGELINI

myA

Home Communications My Company My Tools Organization Compliance

Segui Passaggi successivi

Cerca in SharePoint

EVENTS

1

SUMMER PARTY: el verano llega a Angelini Farmacéutica

El pasado viernes 5 de septiembre, Angelini celebró la primera edición de su esperada **Summer Party**. El evento tuvo lugar en el One Ocean Club, en pleno puerto deportivo de Barcelona. El evento fue precedido por una reunión en la que tuvo lugar el kick off de los eventos del centenario, y se compartió con los colaboradores los próximos eventos con motivo de esta importante celebración. También se presentó oficialmente el logo el logo y el claim, con todo lo que conlleva y representa, diseñado por el equipo de Armando Testa. A continuación, y dentro del marco de la metodología de PLAN, los distintos squads celebraron sus weekly's, compartiendo con el resto de los compañeros las dinámicas, estrategias y beneficios de este nuevo mindset que Angelini Farmacéutica está aplicando con gran éxito.

La reunión concluyó con un lunch frente al mar, amenizado por DJ Nala, durante el cual pudimos intercambiar conversaciones entre compañeros de los distintos departamentos en un ambiente veraniego y distendido. Gracias al toque divertido y ameno del espejo fotomaton pudimos llevarnos un recuerdo junto a nuestros compañeros de esta jornada en la que, por unas horas, rompimos con la rutina para conocer de un modo diferente el trabajo que entre todos estamos llevando a cabo.

Related News

2

EVENTS

SAGLIKLA BESLENEN FIKIRLER

06/13/2019

TURKEY

Angelini University Award! (AUA)

EVENTS

JOB SEEKER 2.0: L'AZIENDA AL CENTRO DELLA CANDIDATE EXPERIENCE!

06/17/2019

ITALY

Job Seeker 2.0: l'azienda al centro della candidate...

EVENTS

LONG LIVE BRUNELLO

06/17/2019

ITALY

Long Live Brunello - Montalcino, 21-23 giugno

3

Commenti

Aggiungere un commento. Digitarne @ per menzionare qualcuno

Pubblica

ANGELINI

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OUR PORTALS

Corporate website

Angelini 100 website

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in

Mi piace

Comento

2 visualizzazioni

Salva per continuare in seguito

Pictured: 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.

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



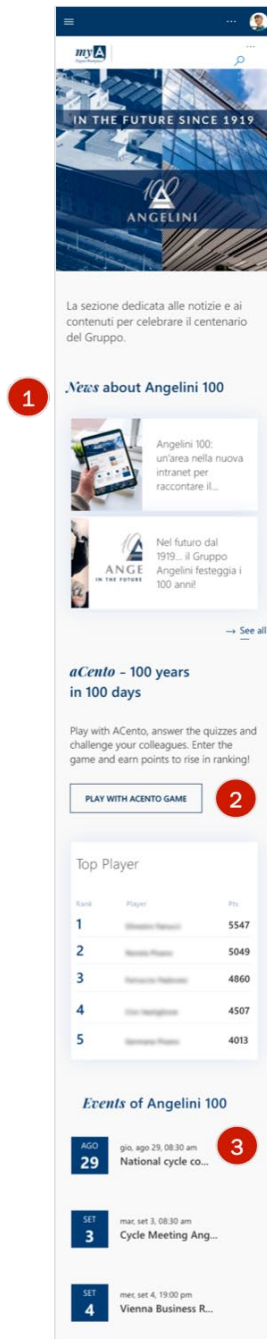
Pictured: MyA offers employees the opportunity to buy wine from Angelini's winery at a discounted price through its mini ecommerce platform. Users can easily make these purchases from their mobile devices.

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



Pictured: 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 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.

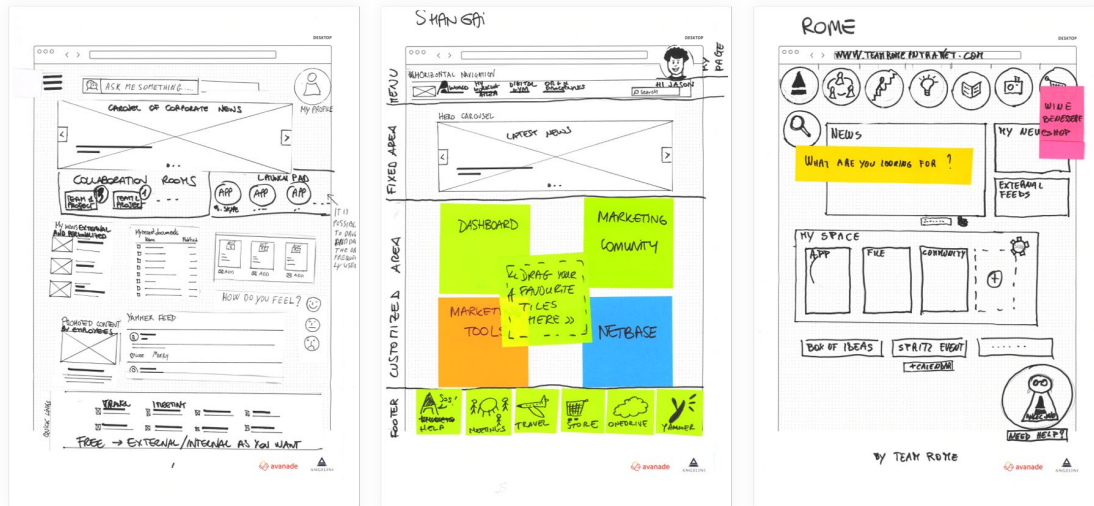
Workshop participants were drawn from across Angelini's many business units and countries, with the stated goal of involving all key project actors and turning them into active participants in the design process. These workshop sessions resulted in the creation of several key project deliverables:

- **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.

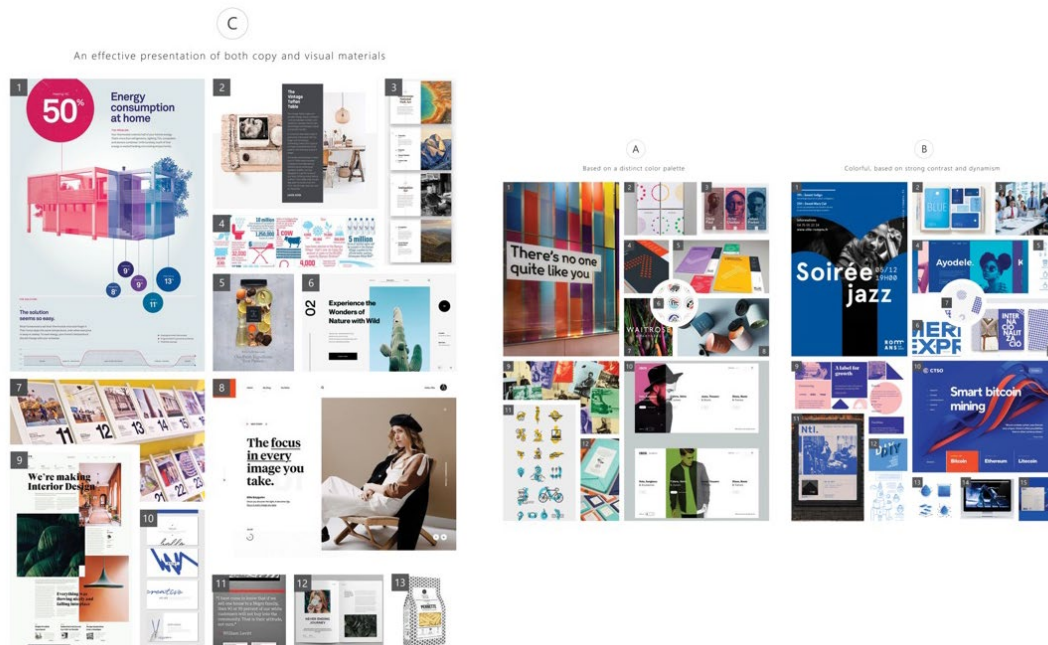
- **Persona development:** Next, participants were asked to put themselves in the shoes of five pre-assigned intranet user types: production engineers, medical sales representatives, financial specialists, a marketing manager, and R&D business development team members. The groups deepened their empathy 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.



Pictured: 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.



Pictured: This shows three mood boards selected by stakeholders during the workshop process.

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.



Pictured: 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.



LET'S MEET ANITA

Anita is a communication specialist, responsible for supporting the communication and the content generation within Angelini. She started working in Group Education & Internal Communication function as assistant 3 years ago, initially through an internship contract and then as internal. Anita's working activity can be split into two main categories: work with her colleagues to plan the communication campaigns and then publish news and other editorial content in the Angelini's intranet.



SHE THINKS ABOUT THE CURRENT INTRANET

News are a fundamental area, even though there is room of improvement. Particularly, archive and categorization are missing.

The layout, characterized by high density of elements, is overwhelming and it does not allow her to scan relevant content.

She never used the Search, it's not visible enough and it goes unnoticed. But she thinks it could be useful.

Shopping is a useful section even though its visibility should be enhanced.



SHE DOES ON THE CURRENT INTRANET

- Reviews comments
- Publishes news and other editorial content
- Creates communities
- Consults the organizational charts
- From the intranet, she accesses to the other company's tools

HER WORKING PAIN POINTS

- **Difficulty to manage multimedia content**, especially when it comes to publish videos and manage different image sizes within a news
- **News categories do not match with the topics effectively published**. At the end, she does not use the tag system
- **She has to check the comments manually** made by other colleagues
- Sometimes, **she gets disturbed by other colleagues** when they do not find some stuff on the current intranet

THE NEW INTRANET SHOULD BE:

- **Innovative**
- **Up to date**
- **Appealing and useful**

Pictured: 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.

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.

DIGITAL ECOSYSTEM MAP



Pictured: 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.

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 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. • Receive topics from local companies and evaluate them with an eye toward matching the content with the appropriate MyA channel. • Validate critical topics and offer editorial support to local editors. • 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. • 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. • 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. 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 <i>Teams</i> to carry out an organized and structured editorial process. 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: • A <i>Teams</i> community encourages collaboration and document sharing. • An external resource helps young editors become more proficient in content management. • 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. 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

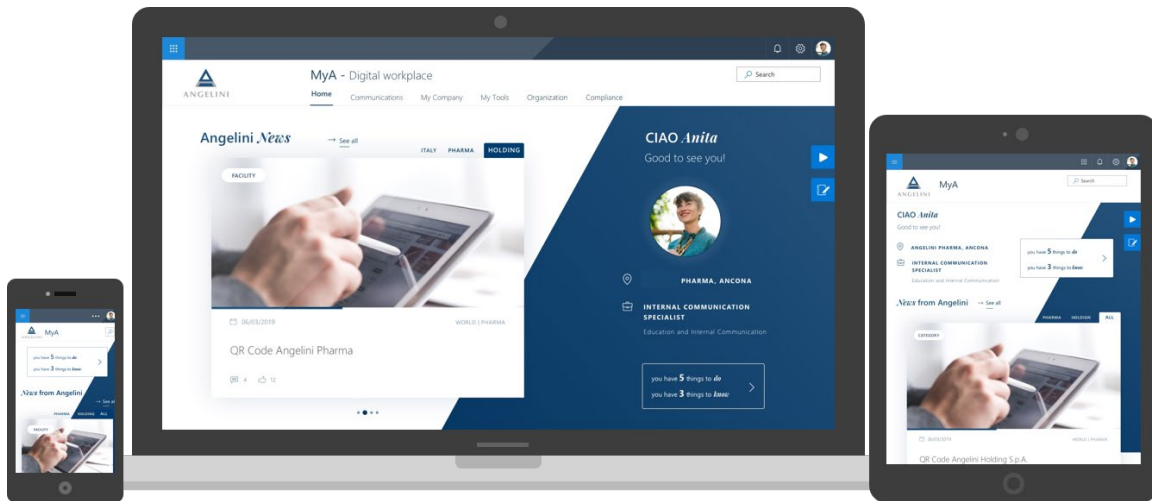
TECHNOLOGY	
Category	Technology Used
Web Server Hardware and Operating System	• SharePoint Online • Azure PaaS Web APIs to provide the integration layer in a micro-services approach
Bug Tracking/Quality Assurance	• Azure Application Insight
Design Tools	• Sketch, InVision, Principle
Site Building Tools	• Integrated Development Environment (IDE): Visual Studio Code, Visual Studio • Front-end frameworks: SPFx 1.8, ReactJS • 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

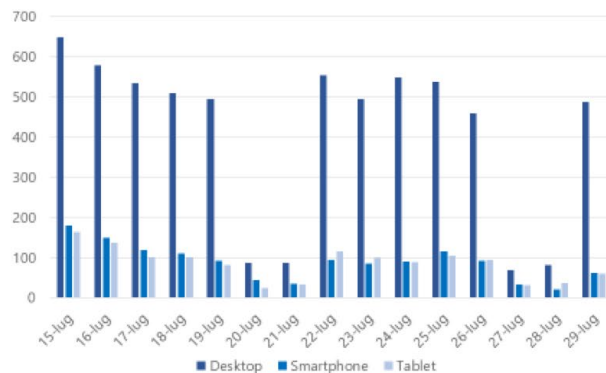
MyA is accessible via mobile devices through responsive web design.

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.



Pictured: Angelini Intranet Mobile Approach. This shows how the Angelini intranet homepage scales for different viewing environments.



Intranet MyA

Pictured: 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.

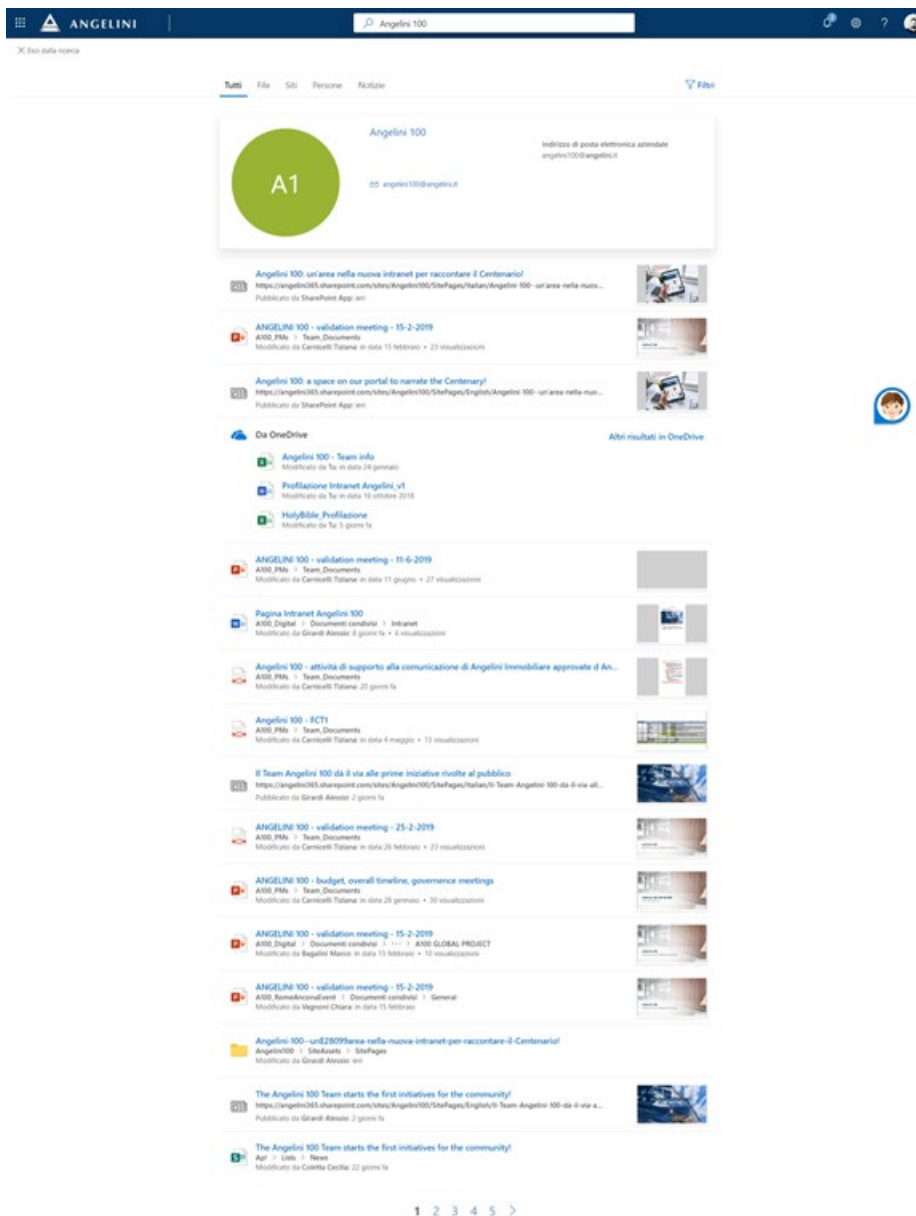
YAMMER

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.



Pictured: 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.

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.”

Korn Ferry (2020)

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

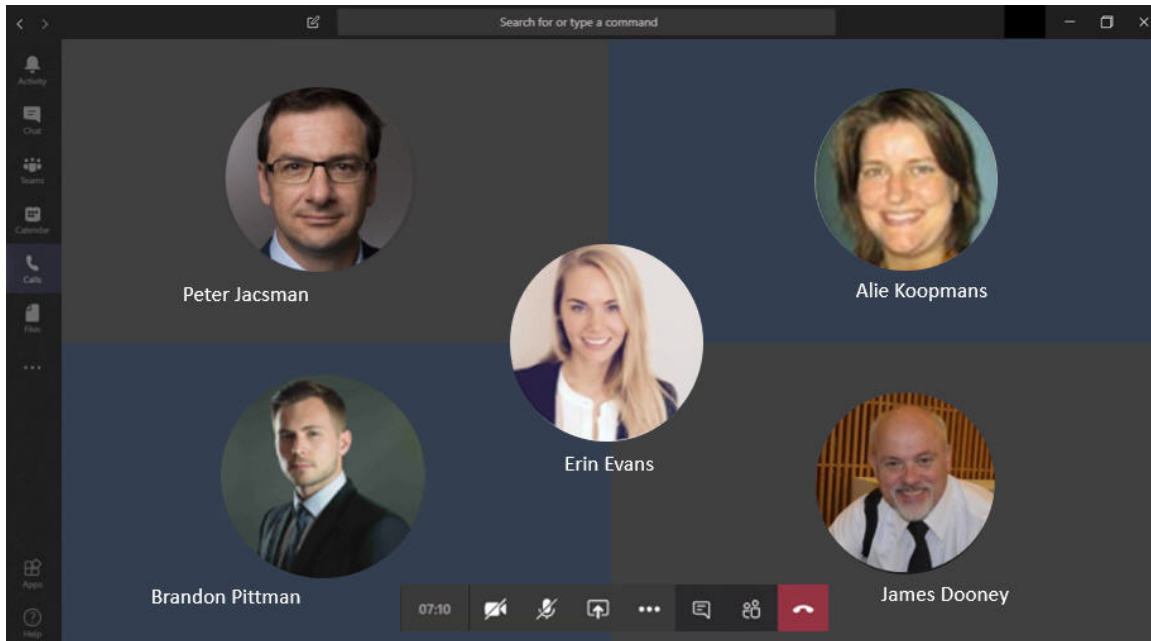
TEAM

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.

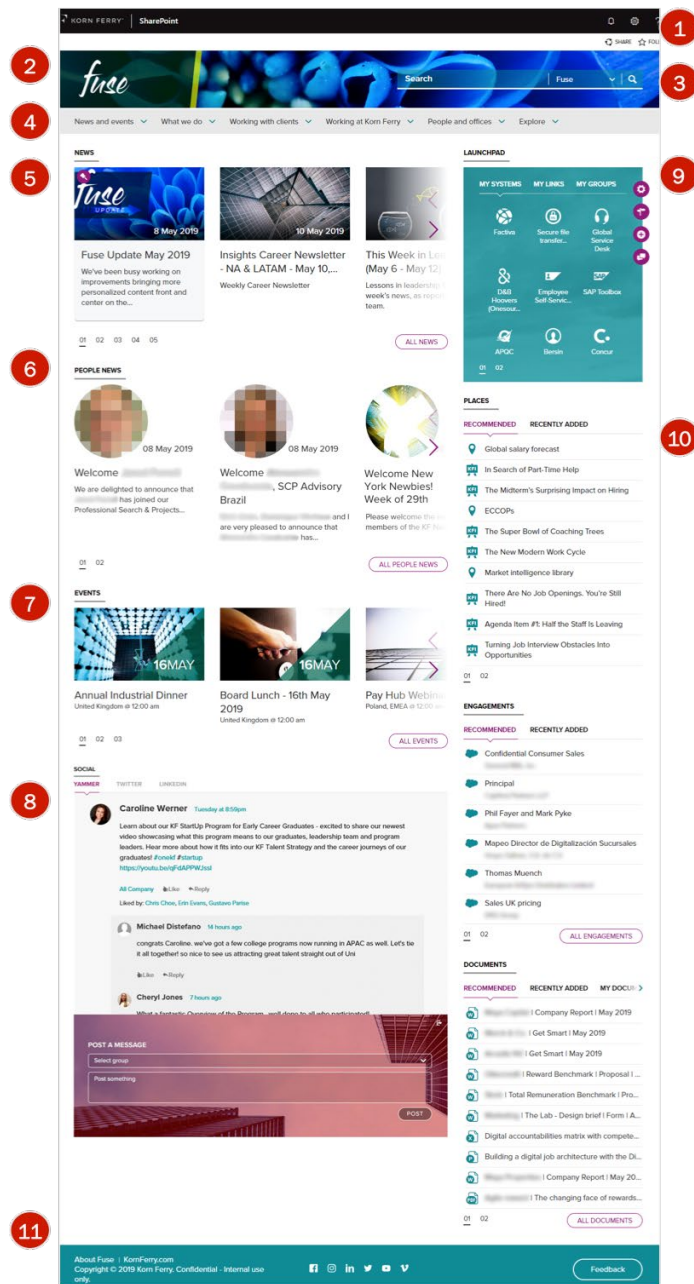
- **The UX was confusing and inconsistent across systems:** One of the challenges in building Fuse was how to provide a consistent UX layer to the Microsoft Office 365 platform. The design team met that challenge by providing a *Launchpad* into applications relevant to the individual user and optimized 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



Pictured: The Fuse homepage consolidates apps, tools, news, collaboration groups, and more, all in one place.

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

The screenshot shows the 'Engagement Explorer' interface. At the top, there's a navigation bar with 'KORN FERRY' and 'SharePoint'. Below it is a 'fuse' logo and a menu with options like 'News and events', 'What we do', 'Working with clients', 'Working at Korn Ferry', 'People and offices', and 'Explore'. A red circle '1' highlights the 'Working with clients' link in the menu.

Below the menu is a search bar. A red circle '2' highlights the search input field containing 'Lloyds'. To the right of the search bar is a dropdown menu showing 'Engagements' and a search icon. Below the search bar, it says 'Sorted by: Most recently opened' and 'About 127 results'.

On the left side, there's a 'FILTERS' section. A red circle '3' highlights the 'Type' filter. The filters include 'Type', 'Solution', 'Opportunity stage and probability', 'Engagement status', 'Opened date', 'Date closed', 'Opportunity modified date', 'Value', 'Geography', 'Market', 'COE', 'Marquee Account', and 'Ultimate Parent'. Each filter has a '+' or '-' icon to expand or collapse it. At the bottom of the filters is a 'Clear All' link.

On the right side, there's a table of engagements. A red circle '4' highlights the table header. The table has columns: 'Client', 'Type', 'Project/Position', 'Solution', 'Opened', 'Closed', 'Modified', and a dropdown arrow. The table lists several engagements, including 'Lloyds Banking Group plc' and 'Emprise Bank'.

At the bottom of the page, there's a footer with 'About Fuse | KornFerry.com', 'Copyright © 2019 Korn Ferry. Confidential - Internal use only.', social media icons, and 'Contribute' and 'Feedback' buttons.

Pictured: Users may select facets on the left side of the *Working with clients* page to filter the list by various topics.

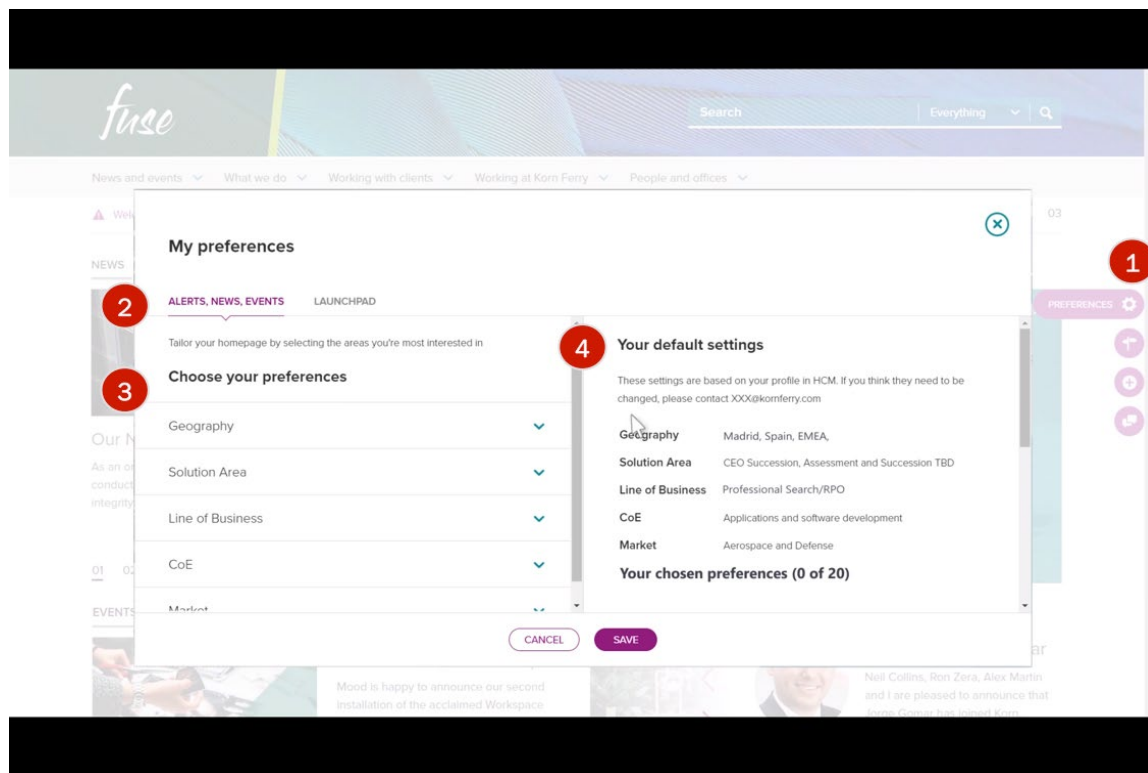
Engagement Explorer Highlights

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



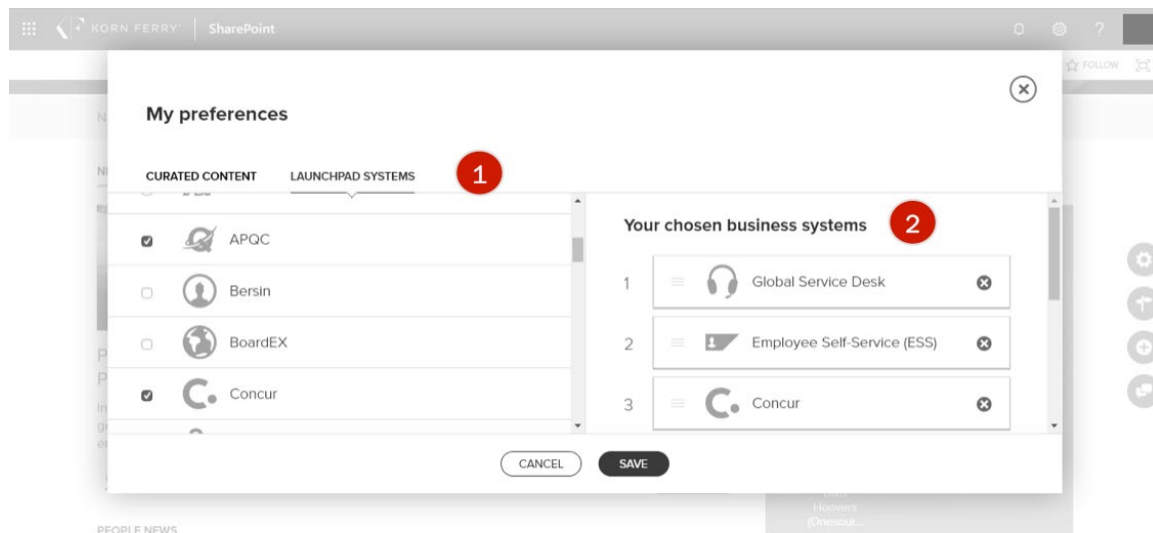
Pictured: Users can customize what they see in *News, Alerts, Events, and Launchpad*.

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



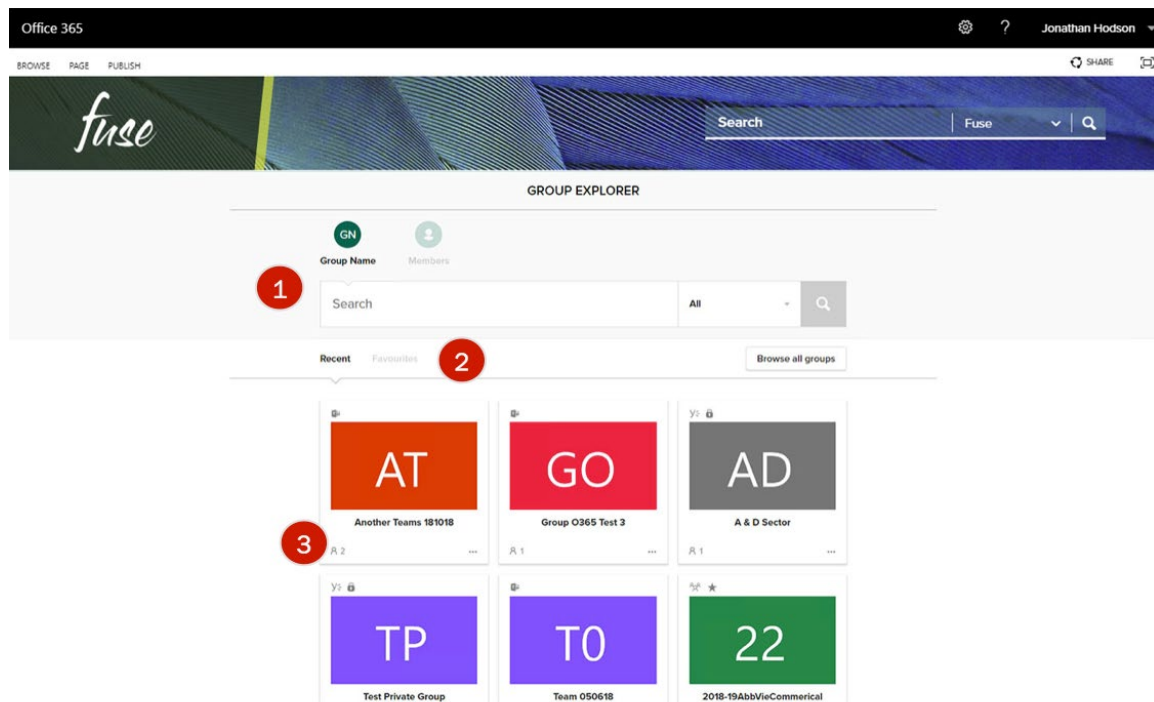
Pictured: Employees can change the default links that appear in their *Launchpad* so they can access exactly what they need.

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



Pictured: This page offers groups information consolidated in one place, accessible via suggested links, search, and browsing.

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

Office 365

Jonathan Hodson

SHARE

News and events

What we do

Working with clients

Working at Korn Ferry

People and offices

Explore

> Contribute to Fuse

1

Contribute to Fuse

I want to share

News

Events

Market Insights

Documents

Paste the article's URL

https://www.loremipsumdolor.com

NEXT

A thumbnail for your content cannot be created. Please provide more info

Title

Title of the article

Description

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud

Thumbnail

We will use this thumbnail for your Market Insight

MARKET INSIGHTS

Or provide a URL to the image you want to use

www.unsplash.com/office

NEXT

Title of the article

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud

Tag the content

COI

Corporate communications

Industry

Life Sciences, Technology

Topic

Lorem Ipsum

CANCEL

CREATE

Consectetur | Adipiscing elit | Aenean | Eiusmod

Contribute

Feedback

Pictured: Employees can use the Contribute Wizard to share content such as news and events on Fuse.

Contribute Wizard Highlights

The Contribute Wizard allows users to share different types of content—news, events, market insights, and documents—easily. Since content is

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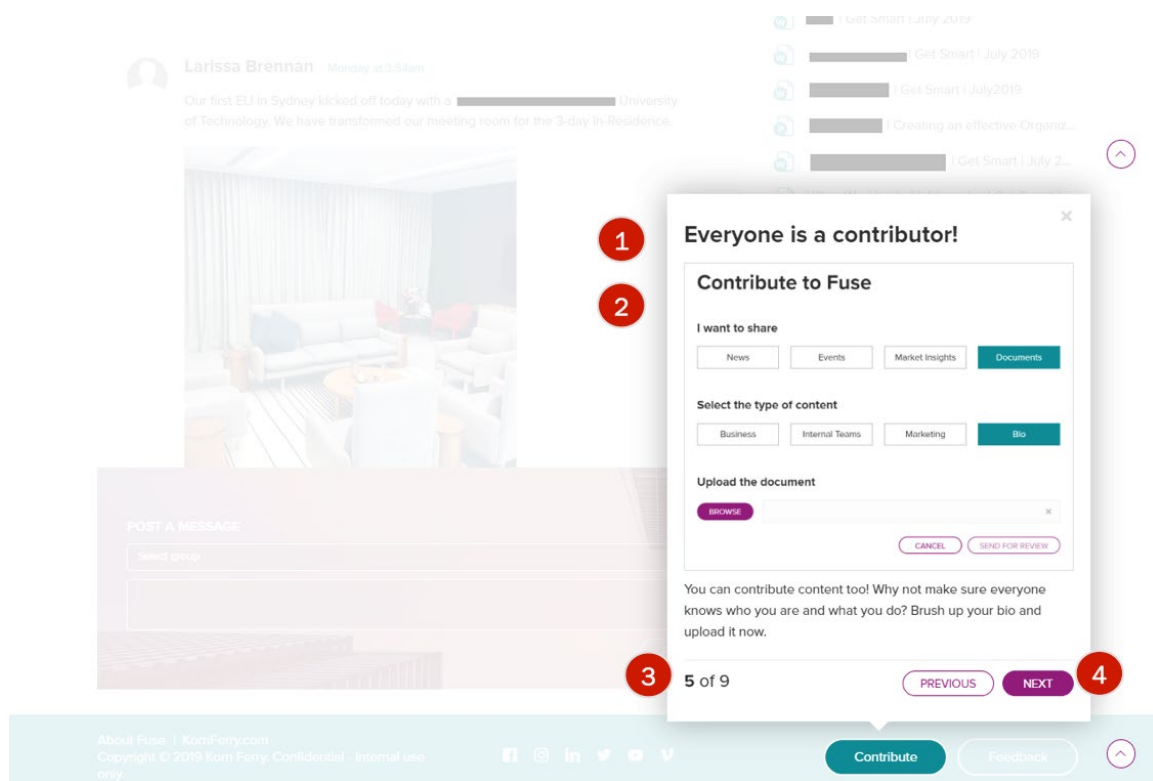
WWW.NNGROUP.COM

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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



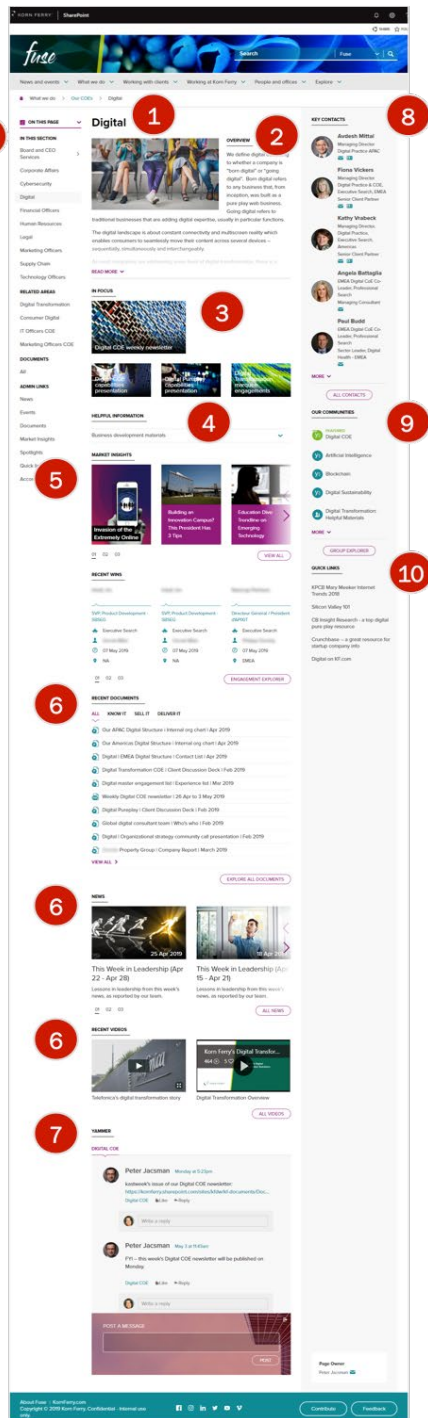
Pictured: Upon users’ first visit to Fuse they are presented with a series of nine lightboxes, each describing a specific platform feature. The box shown here is step 5, which introduces users to ways that they can contribute to the platform, and encourages them to do so—letting them know that *Everyone is a Contributor!*

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



Pictured: 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."

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.

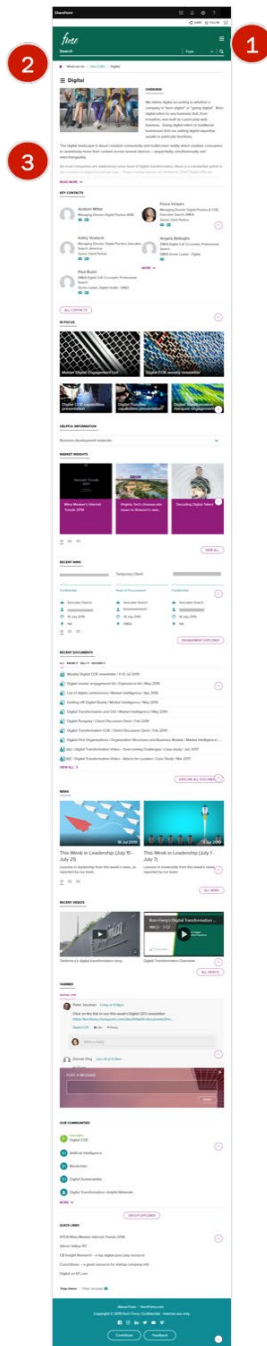
The main page for each functional area's section is what the team refers to as a *storefront page*. These areas are well organized and each follows the same template. This consistency helps designers spend less time organizing pages and helps users spend less time acclimating to them.

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



Pictured: Items are presented in order of importance on mobile devices.

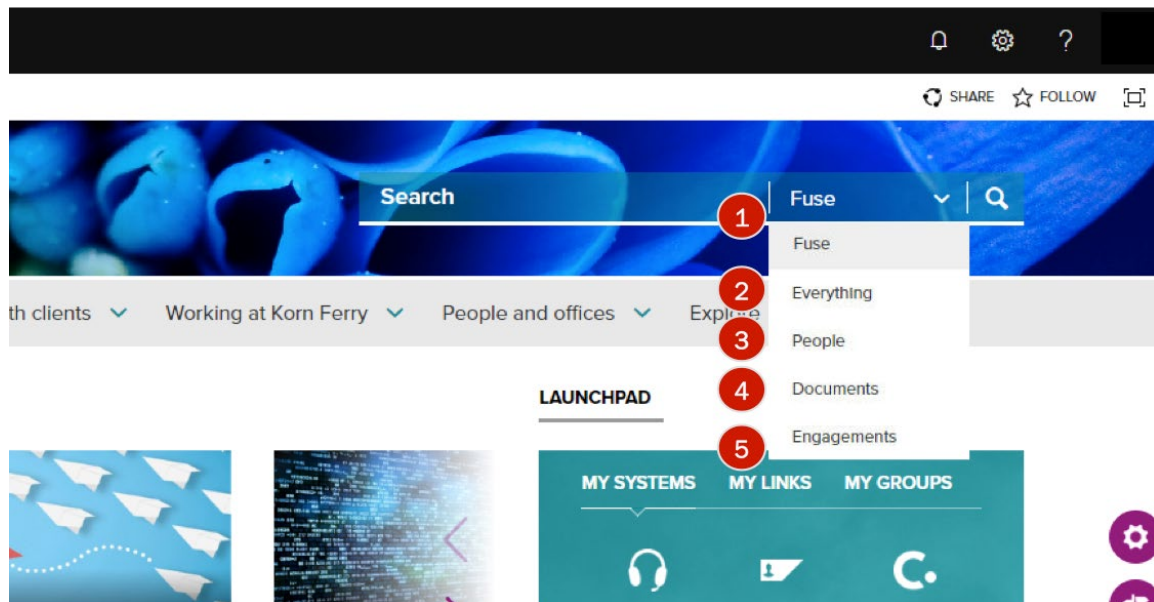
Mobile Section Page Highlights

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



Pictured: The site search defaults to search the entire site, but can be scoped to search more or less.

Search Front End Highlights

Searches on Fuse can cast a very broad or very narrow net to assist employees in 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



2 Please join me in thanking InsideKF for nearly a decade of service with Korn Ferry. It will be replaced by... me.

1 I'm Fuse, your new digital workspace—**so much** more than just an intranet.

3 I can't wait to start working together on Monday! Click below to see what I can do.

4



2 Yours,

Fuse

3 Through me, you'll find everything





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Pictured: One of the emails promoting Fuse includes a video and has a friendly tone of voice.

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 • Developed and implemented features • Provided project management
Ogilvy	• Designed the Fuse corporate identity and launch materials
BA Insight	• Provided connectors for SharePoint search • 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

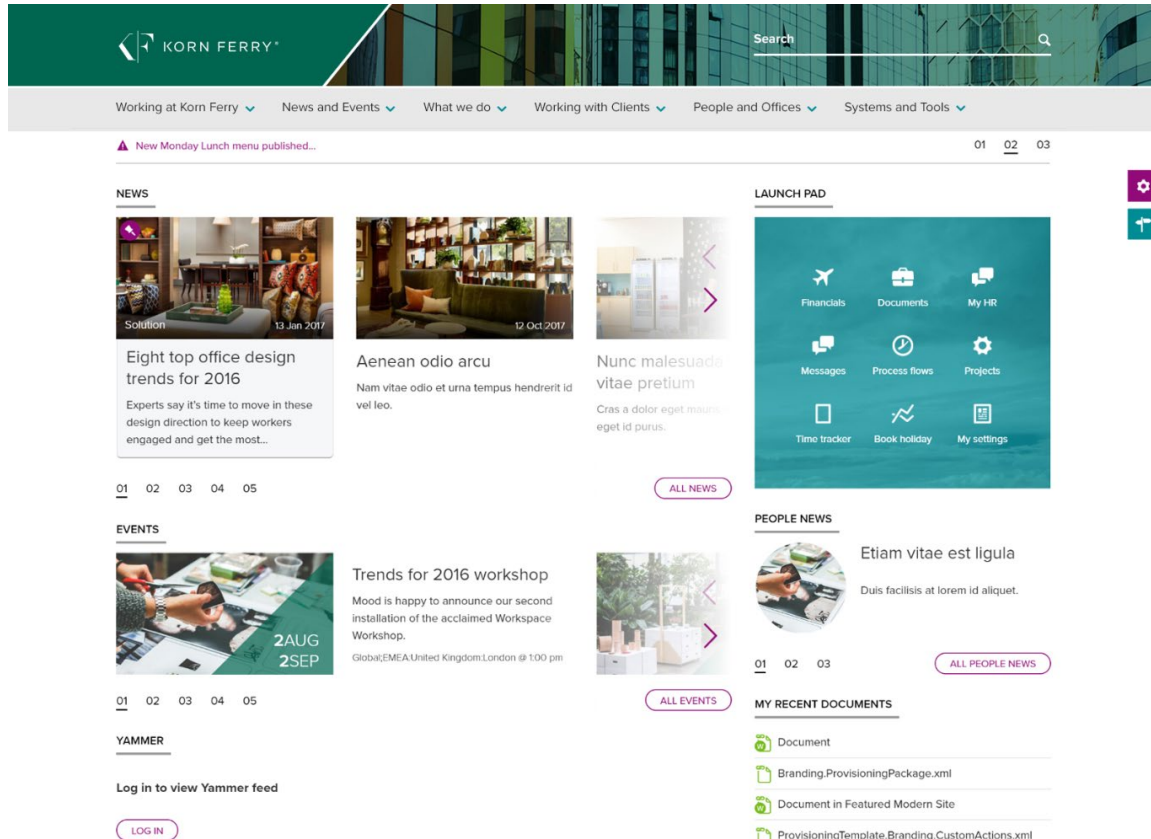
hosting key business processes at such a pivotal moment of transition, Fuse's place as a source of optimization for the organization was solidified.

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.

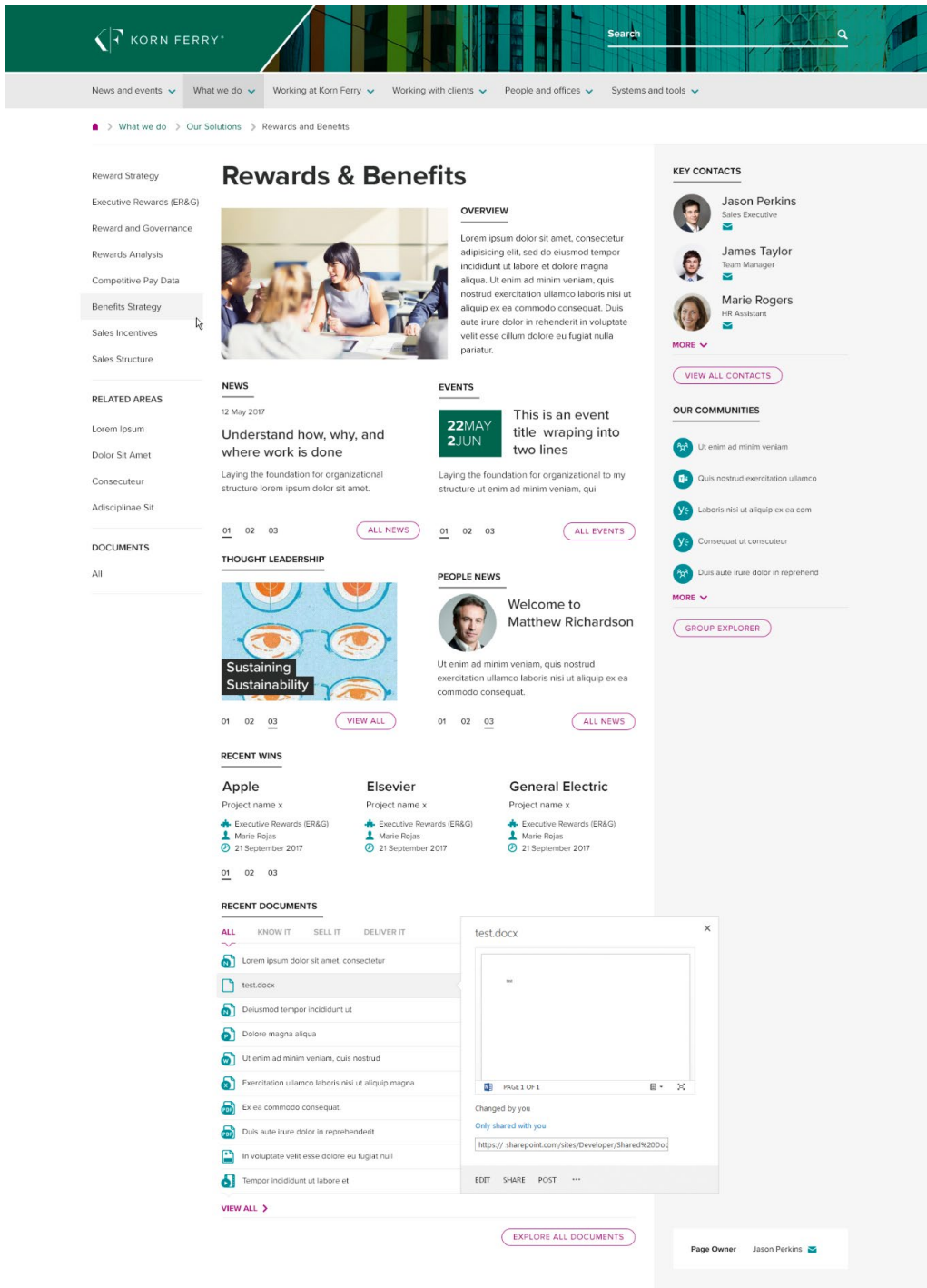
Ultimately, what solidified Fuse's place at the center of the Korn Ferry culture was the fact that all internal communications now go through Fuse.



Pictured: 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.



Pictured: This image shows the first design of the Fuse homepage in June 2017, about a year prior to launch.



Pictured: This image shows an early design for a content page on Fuse, about a year prior to the launch.

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 - 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 - Develop new features and improvements based on feedback from users - Train super users and page owners - Drive user adoption through training, roadshows, lunch & learns, and demos
Super Users and Page Owners	- Develop and manage content on their designated pages - Contribute to news and events pages
All Staff	- Manage their own bios; ensure bio is on brand and upload to Fuse - Contribute documents

URL AND ACCESS

ACCESS INFORMATION	
Item	Status
URL	https://kornferry.sharepoint.com/sites/kfdw - 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.



Pictured: 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.

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.

Selection Criteria and Process

Nielsen Norman Group's Intranet Design Annual rewards great examples of useful, usable intranets that meet the needs of people using them. To find these intranets and their teams, we post a call for entries each year in May on our corporate website, www.nngroup.com.

To enter, organizations — either design firms responsible for the intranet or the organization's intranet team — can submit some background information about the organization, including a brief description of the intranet, its features, functions, 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 (as necessary)
3. In-depth design reviews on the top entries to choose the top 10
4. Follow-up interviews with the top 10

Each step is detailed below.

INITIAL DESIGN REVIEWS AND NUMERIC RANKINGS

The judges (see next section, *About the Authors*) conduct baseline design reviews and narrow the field down to tier-one submissions. We rate each site numerically and note any great features or lacking qualities. We base the numeric rankings on criteria typically viewed as key to intranet usability, including some criteria that emerge from submissions or trends in previous years. We rate each submission on a scale of 0 to 3, with 3 being the best rating. Criteria include:

Navigation:

- Main navigation on every page
- Consistent, easy navigation
- Clear hierarchy
- Consistent style across the intranet
- Horizontal scrolling only where appropriate
- Expected page layout and appropriate vertical scrolling

Design:

- Pleasing aesthetics, clean design
- Page hierarchy and priority
- Brand support
- Engaging and helpful homepage design
- Good contrast between text and background
- Good use of graphics
- Legible text

- Distinguishable headings and links
- The right amount of text and links

Search:

- Consistently available search
- Relationship to employee search
- Good search design (ideally, a simple open field at the top of pages)

Personalization and News Delivery:

- Personalization and roles, catering to different offices or cultures
- Organization-related news
- Information about internal groups

Content:

- Well-written text
- Employee directory or directory search
- Content posting and editing capabilities for all employees
- Content management, content curation, editorial team management
- Business needs met

Overall:

- Simple forms
- Support for the main corporate functions
- Encapsulation of the organization's spirit
- Use of innovative, fun, or original features
- Accessibility
- Useful mobile offerings
- Originality or "something special"

FOLLOW-UP QUESTIONS WITH TOP TIER (WHEN NECESSARY)

We look at all the information submitted to us as part of the review process. Considerations of target users, tasks, and basic usability guidelines inform our scores and analysis. We review usability research findings, but we do not conduct usability evaluations with users of the intranets. Although we believe such evaluations are the best way to reveal what works (and doesn't) about a design, we conduct large-scale research studies based on testing that inform our expert reviews of the intranet submissions.¹

After our reviews, we sometimes ask follow-up questions, such as for clarification or if a submission was missing information.

¹ *Intranet Usability Guidelines* report series is available for purchase:
<http://www.nngroup.com/reports/intranet/guidelines/>

THOROUGH DESIGN REVIEW

After narrowing the initial submissions, we select the top 25 and complete more thorough reviews, narrowing the field to the 10 best.

FOLLOW-UP INTERVIEWS WITH TOP 10

We then notify the top 10 and make sure they have appropriate corporate approvals to share their designs and some content. We give them a series of follow-up questions about the site, team, and process in order to write the case studies for the report. We ask for detailed information about every part of the process, including design decisions, research and usability work, challenges faced, and lessons learned. We ask all teams the same core questions and ask detailed questions about specific aspects of each design as well.

Examples of some of the questions we asked teams include:

- How did the intranet start?
- How many people comprise the intranet staff?
- How is the intranet governed?
- What are the goals of the intranet and redesign project?
- What were your project's main UX research and design methods?
- How did you derive your IA, and search?
- What were your milestones and how well were they met?
- What makes your intranet unique?
- What advice would you offer to other intranet designers?

About the Authors

Kara Pernice is the Managing Director at Nielsen Norman Group and has more than 20 years of experience in use experience (UX) research and design. The Wall Street Journal called Pernice an “intranet guru.” Since joining Nielsen Norman Group, Pernice has led many major intercontinental research studies, authored a variety of research reports and hundreds of guidelines, and coauthored the book *Eyetracking Web Usability*. She has lectured around the world on a wide range of topics, and her client work spans many businesses and industries. Before joining NN/g, Pernice gained invaluable experience about building and managing UX in an assortment of development environments and established several successful user experience programs. A champion for usability, Pernice chaired the Usability Professionals’ Association 2000 and 2001 conferences, and served as 2002 conference advisor. She holds an M.B.A. from Northeastern University and a B.A. from Simmons College.

Amy Schade is a Director at Nielsen Norman Group. She has led research and co-authored NN/g reports on the usability of intranets, email newsletters, site maps, and the e-commerce report series. She has co-authored NN/g’s Intranet Design Annuals since 2010 as well as NN/g’s Intranet Information Architecture report.

Schade works with clients large and small in industries including e-commerce, music, publishing, banking, government, telecommunications, non-profits, and education, including extensive work on corporate intranets. She has conducted worldwide user research, including longitudinal studies, remote studies, accessibility studies, and eyetracking research, running studies in the United States, Canada, Europe, Asia, and Australia. She regularly presents tutorials on usability testing, intranet usability, mobile user experience, writing for the web, and email newsletters.

Before joining NN/g, Schade worked as an information architect at arc e-Consultancy. She previously held a variety of positions in advertising and web production. She holds a master’s degree from the Interactive Telecommunications Program at New York University and a BA in communications from the University of Pennsylvania.

Patty Caya (www.pattycaya.com) is a freelance journalist (writer and editor), and award-winning digital media producer. In her business writing, she specializes in topics relating to usability (including social media and mobile design), and the business and technology of the web. She has co-authored the Intranet Design Annuals 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 authored the 3rd, 4th, and 5th editions of the report on intranet portals and contributed to the *Application Design Showcase (2nd Edition)*.

For more than a decade, Caya has split her time between journalism projects and web consulting. She is an experienced content strategist and interaction designer. She has consulted for many of Boston’s top interactive agencies, leading web and intranet development projects as well as usability testing, research, and design initiatives. Her client roster spans a wide range of industries and includes leading national brands alongside mission-driven non-profits. 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.

Anna Kaley is a User Experience Specialist at Nielsen Norman Group. Prior to joining NN/g, Anna worked for more than 10 years in user experience architecture, design, and digital strategy. She conducted complex user research, service, and experience design for healthcare, agriculture, finance, tourism, retail, nonprofit, and engineering clients. She also worked for a global, enterprise-level retailer where she was responsible for ecommerce and software as a service UX across B2C (business-to-consumer) and B2B (business-to-business) channels. Anna is skilled at applying insights from qualitative and quantitative research to drive conversion, increase revenue, and improve user satisfaction in digital products. She also has expertise in digital media planning, search marketing, and graphic design.

Anna held UX roles on both client-side product teams and in digital agencies of various sizes. She understands the challenges that user experience 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 from the University of Missouri, Columbia. She is also a certified Professional Scrum Master.

Maria Rosala is a UX Specialist with Nielsen Norman Group. She plans and executes independent research for NN/g and leads UX training courses. Maria carried 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*. She is also an author of the 2020 and 2021 Intranet Design Annual.

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 casework 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.

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