Best Financial Sector Intranets 2001–2020

39 Case Studies of Award-Winning Intranets from Banks, Insurance Companies, Brokerage Companies, and Other Financial Service Organizations, Reprinted from the *Intranet Design Annuals*

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Fidelity Investments Canada

Fidelity Investments Canada, part of the Fidelity Investments group, is Canada's fourth largest mutual fund company. With headquarters in Toronto, the company has 950 employees in regional offices in Halifax, Montreal, Ottawa, Winnipeg, Calgary, Vancouver and a distribution facility in Markham, Ontario.

DESIGN TEAM:
In-house
(Employees at Fidelity Investments Canada)

Pictured: homepage



SUMMARY

One great challenge this intranet's designers faced was providing an appropriate interface for the different user groups and varied tasks the site needs to support. This site is used by many people, and some of these people, like the frontline call-center staff, live in this intranet, using it as a knowledge base to help answer customers' questions. Others use it less frequently, for things like looking up generic corporate information. Designing for these two very different groups, with different needs, goals, and deadlines, is very difficult. But, these designers did a nice job presenting all items in a way that is easy to understand.

Another challenge the design team faced was migrating the data from the old site into a database to drive the new content delivery system. They approached the problem by designing a new information architecture, while simultaneously collecting user feedback. We would typically recommend usability evaluations and heuristic reviews at this stage instead of the focus groups they employed, but the card-sorting methods they used proved invaluable in naming and categorizing commands.

The designers acknowledged that eye-catching design is important in getting people to visit the site for the first time. But they also realized that interesting, necessary, and fresh content are the most important attributes. Thus, the most ingenious design consideration was to encourage users to post their own information on the site and make it easy for them to do so. So, unlike some intranets, this one is not a morgue for old human resource forms and documents. Instead, it's a living testament to the happenings and inner-workings of Fidelity Investments Canada.

As for the usability, the site is simple to navigate, with expected controls on the top and left side. Links are clearly marked. Text is legible, albeit a little small. There is a little too much text on pages, but it is still manageable. Colors are not distracting, and there is adequate contrast between the backgrounds and the text. *Search* is visible and very simply presented.

Scoring

Simple look	Simple navigation	Consistent navigation across pages	Visible search bar (or button)	Simple search	Limited (and well-presented) page text	Clear labels	Clear links (name and marks)
2	2.5	2.5	3	3	1.5	2	1.5

INTRANET

Every day, the inSite intranet provides corporate information to about 1,000 employees and acts as a knowledge base to help call-center staff answer customer questions. Typical tasks might include looking up corporate information and industry news; filling in online forms to claim dental or medical benefits; and recording human resources information, such as a change of address or marital status.

BACKGROUND

In 1999, Fidelity faced a problem familiar to many large organizations: It had an existing intranet site (launched in 1997) that provided a central repository for

company information, but usage was low and users complained that it was hard to find what they were looking for.

"The site was very departmentally focused," says Jacquie Morin. "This meant that if, say, a call-center operator was looking for product information related to a particular fund, it might be scattered around various areas of the site, and people wouldn't necessarily know where to find it."

The site lacked user appeal; the front page contained only links, with little to entice people in. Employees were free to publish information on the site using the Web tools of their choice, with patchy, inconsistent results. Furthermore, because there were no consistent page descriptions for the content, the search engine had little metadata to work on, making searching a waste of time.

Backed by senior management, the corporate communications department in charge of the site decided it was time for a redesign that would turn the site into a genuine online community and make employees want to use it.

GOALS AND CONSTRAINTS

Fidelity decided that the existing intranet represented a lost opportunity. Designers wanted to promote the site as a one-stop shop for company information and use it to help create a greater sense of community within the company, starting with the homepage — which at the time consisted of an uninspiring series of links.

Pictured: the homepage before the redesign



Pictured: a page before the redesign



One of the main goals for the new site was to reinvent the homepage to make it a compelling experience for users and draw people into the site.

Another goal was to encourage more employees to use the Web regularly, to better position the company to exploit new business technologies. "From a technology leadership point of view, we wanted to make it easy for people to communicate online," explains Jacquie.

Since Fidelity's call-center staff use inSite as an information source when dealing with the public, it was particularly important from a business viewpoint to ensure that the product, policy, and procedure information was accurate, up to date, and easy to find. Fidelity aimed to achieve this goal by introducing a CMS that would make it easy to keep material updated.

"Our philosophy is to have a site that's centrally managed, but with decentralized content," Jacquie says. "We wanted to take out the need for employees to worry about designing pages and make this into a business tool."

There were few constraints on the actual design, though the steering group was keen to incorporate Fidelity's corporate colors — green and gold — to identify the site

more closely with the company. The site also had to work in an early version of Netscape (4.5) and on a wide range of different PCs and monitors.

PROCESS

The project got underway in June 1999, co-sponsored by the IS and corporate communications departments, with the company president as executive champion. Most of the development work was carried out by a team of seven, with skills in project management, business analysis, information architecture, web user interface design, business operations, and systems development and architecture.

Because the IS team had to plan data migration from the old site into a database to drive the new content delivery system, the first step was to develop a new information architecture. "We spent a lot of time on information design first, looking at the content on the old site and seeing how it would port over to the new version, then slowly worked up to the design from there," recalls Ingrid van der Zande.

In July, the team held a focus group with 60 employees drawn from throughout the company. Part of this was a card-sort exercise, a technique borrowed from Fidelity's human interface design group, which develops interfaces for the company's online systems. Designers put all of the old intranet's subject areas on index cards, and asked participants to sort them into logical groups, and classify and label each group.

The card sort was followed, in September through December, by a formal audit of all the site information. "We went through an exercise to determine who owned each piece of content, who the target audience was, and how often it had to be updated," Ingrid says. "Then we had each business unit audit the content to determine what was going to move on to the new site."

While those activities continued, the team was also doing user research to get a picture of what people used on the old site and what they wanted to see in the new one. They sent out questionnaires by email and carried out a series of face-to-face interviews with three or four representatives from each of the 40 or so business units.

The information analysis led to the design of the database that would drive both the CMS and the new system's navigation.

It was not until January 2000, when the information design had fallen into place, that the team started work on the visual design. Ingrid produced four or five designs, showing them first to the project team and then to a group of six company executives. The new designs retained some elements of the previous inSite version, with departmental menu tabs across the top and the "fast links," which user feedback had shown were popular, down the left-hand side. To the front page, the designers added a news feature and stock market information; they made the overall design more eye-catching with a strategic use of graphics.

"The idea of the main feature was to attract attention and pull people into the site, and that was also why we started using the main graphic," Ingrid explains.

They relabeled menu tabs to reflect major subject categories, which users had defined in the focus group the previous year. They also simplified tab labeling and reduced the number of tabs from eight to seven.

Pictured: the tab order before the redesign



They introduced the green left-hand navigation bar early on to provide structure for the page and reduce the amount of white space. "We felt the all-white design had too many small sections and nothing holding the areas together," Ingrid says.

Pictured: the site's navigation, before the green navigation bar was added



The human interface group in Boston carried out a heuristic review of the prototype. The design has evolved further since the new version was launched. For example, the *More inSite Features* section has been added in response to user demand. "Initially we thought that the main news story on the homepage would change three times a week," Jacquie says. "But we were getting so many employees demanding space that the front-page slot was soon booked up a month in advance. We created the *More inSite Features* section to accommodate all the new content that people were sending in."

RESULTS

The intranet team collects monthly inSite usage statistics, and early figures indicate that the site's new look is fulfilling the aim of attracting more users. As of March 2001, almost a year after launch in April 2000, usage was up by 155%. A recent survey found that 82% of employees used the intranet as their primary source of information and 83% said it made their jobs easier.

Future plans for inSite include increased personalization and more interactivity.

LESSONS LEARNED

CHOOSE THE RIGHT TEAM

"We used a fairly small team of seven people with a wide range of skill sets," says Ingrid. "We were fortunate that our technical team worked very closely with the group. In some Web projects, the technical team is very much removed, and you have to hope and pray that the result they come back with is what you were hoping for."

START WITH THE RIGHT INFORMATION

"It helped that we took huge care with the information design up front, making sure that the content would go into the content management system and come out in a way that was very usable," notes Ingrid, "and that has paid off in the finished site."

Credit Suisse Financial Services

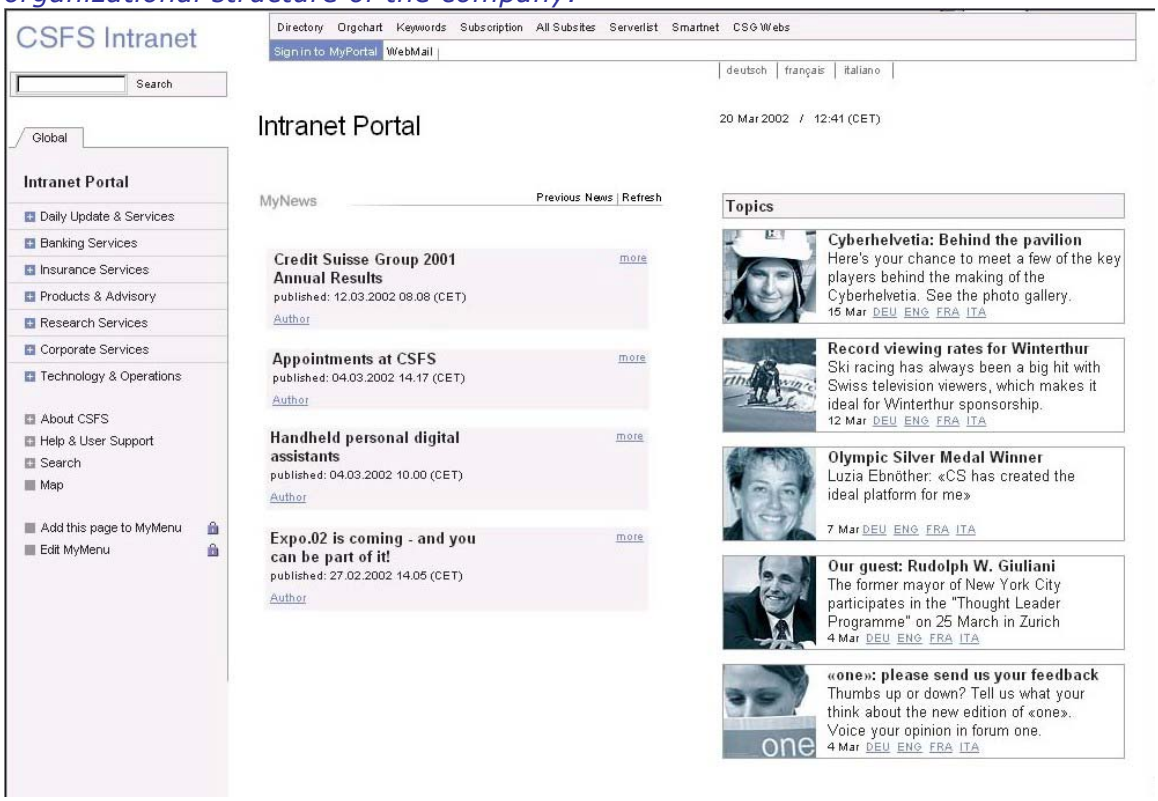
USING THE INTRANET:
Credit Suisse Financial Services provides banking and insurance solutions for private clients, companies, and institutions around the world.

DESIGN TEAM:
Credit Suisse Financial Services internal design and IT team.

MEMBERS:

CSFS: URS BUOB, DIRECTOR; ANDREAS HEDINGER, VP; JAMAL SADICK, VP; BOJAN BLECIC, ACCOUNT MANAGER FOR TECHNOLOGY AND OPERATIONS

Pictured: The intranet's home page is a non-personalized portal with generic news. The portal is in English, and the navigation displays the organizational structure of the company.



SUMMARY
The Credit Suisse Financial Services (CSFS) intranet, composed of one million pages, supports about 28,000 employees distributed all over the world. The many user groups carry out distinctive tasks, from simple information gathering to complex work processes, so it's important not to inundate users with information that is not essential to them. This intranet succeeds through the simple navigational scheme, subsites, and personalization features.

The default home page *(pictured above)* shows a simple, attractive page with news; the organizational structure is disclosed via the left vertical navigation. In most cases, we recommend that your organizational structure does not drive intranet

design. However, in this case it works since the organizational units actually make sense as navigational categories.

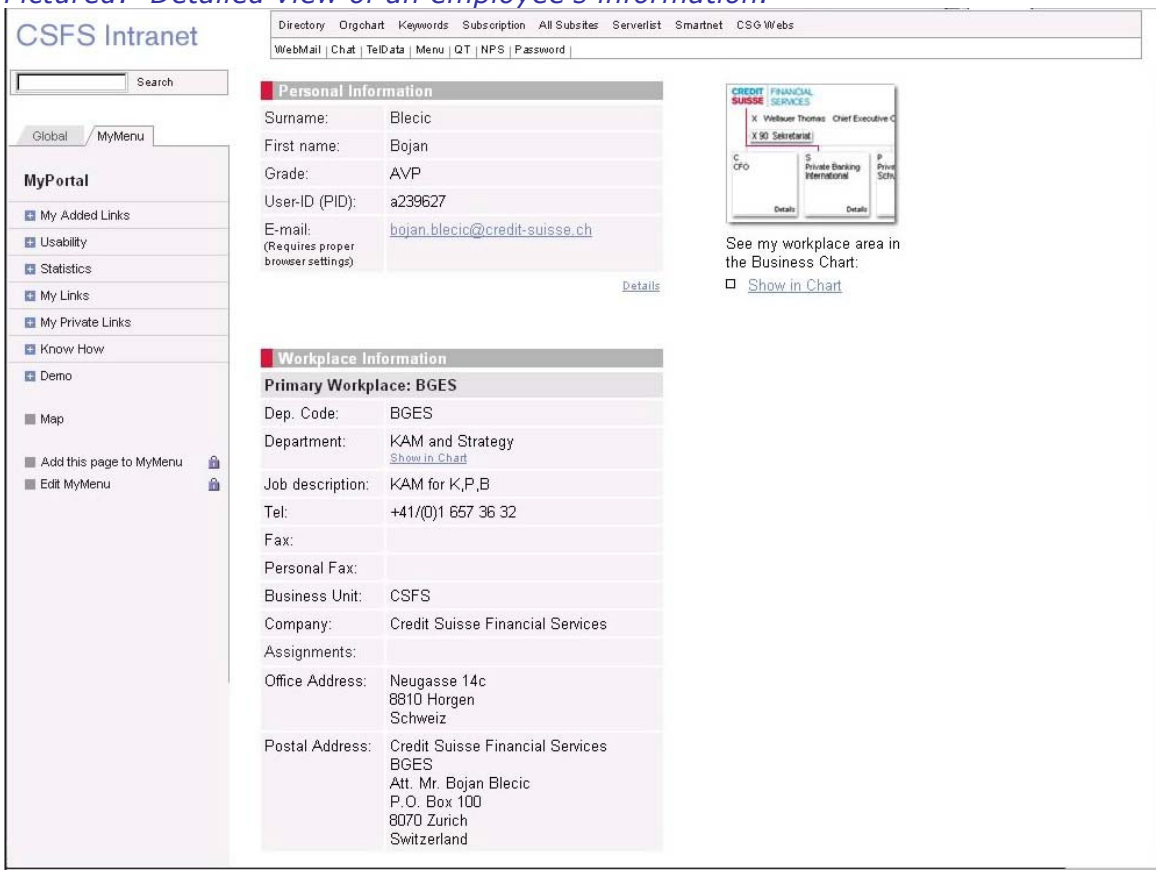
Once logged in, only some of the default page remains, and the rest is customized to the specific user's needs. The news and articles are displayed in the employee's language. A set of community dedicated news and/or channel news is displayed in place of the generic news, and a new menu, *MyMenu,* appears. This menu is editable and configurable, which lets employees with different international working places instantly get their own bookmarks.

Pictured: The home page, MyPortal*, once the user has logged in. The new page is in the user's language, with site-specific news and* MyMenu.



The employee search feature is important, with more than 25,000 users. After searching for a user, the detailed view shows all the most important information a person might want.

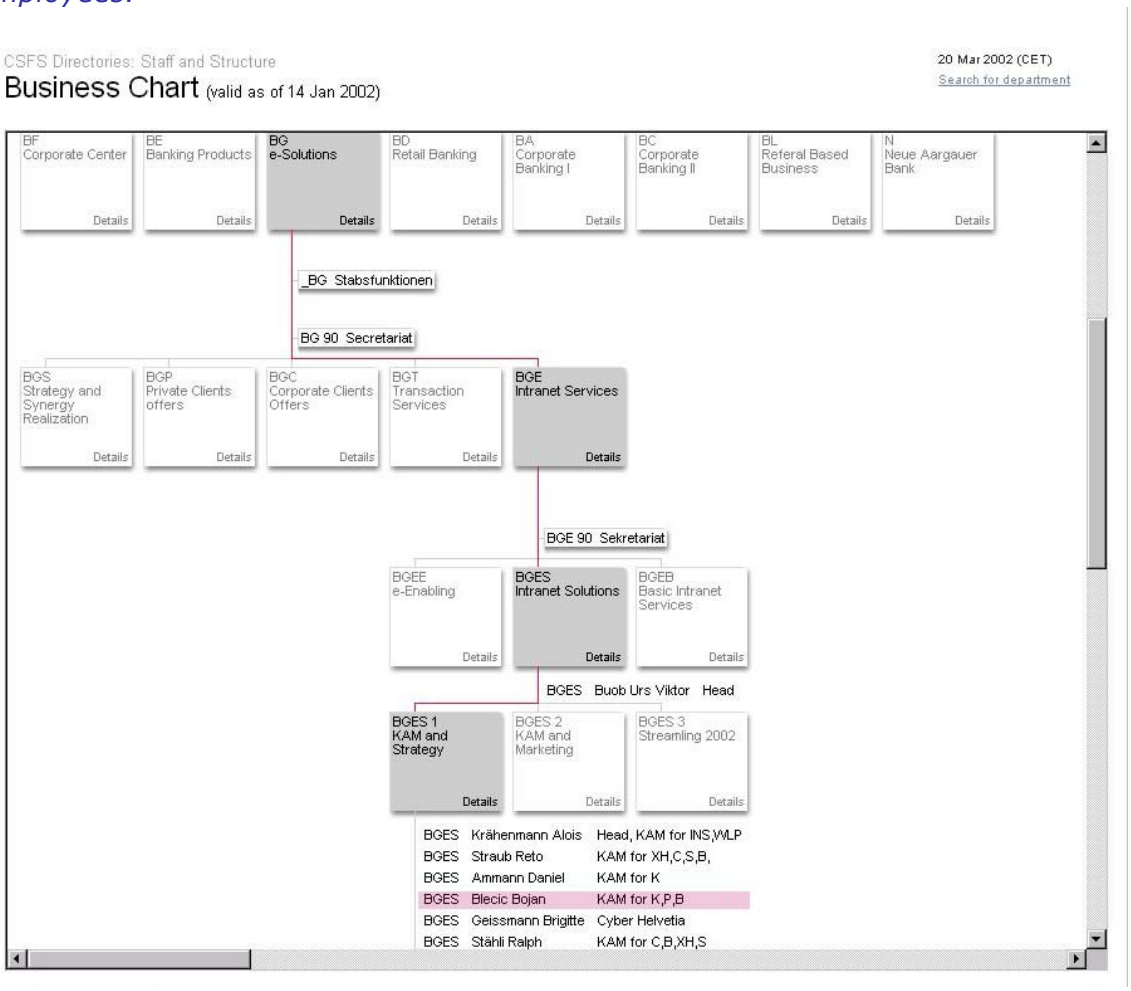
Pictured: Detailed view of an employee's information.



An innovative feature of employee search is that users can locate a person based on their position in the company using the organization chart. This feature lets users navigate the org chart and different company units to find a person, which is convenient if the user knows the person is in a specific group, but doesn't know his or her name. The system also lets users cross-navigate through the chart's interactive boxes, clicking on boxes to show employees in each unit. The employee names also link to each employee's *My Page.*

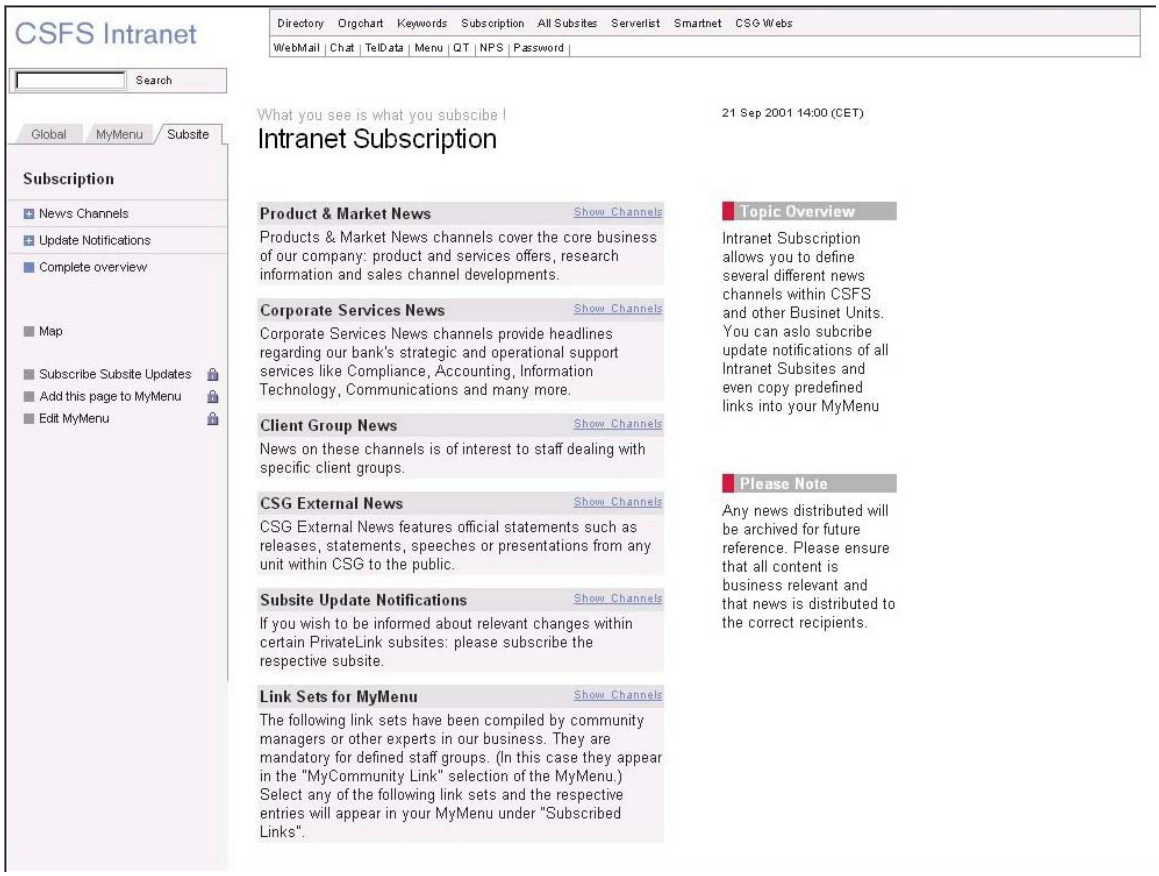
The most interesting aspect of this feature is that it is one of many designs that had roots in an earlier intranet design that the designers were, in some ways, forced to follow. While many designers find it attractive to have a blank slate to exercise their creativity on, it can be a great gift to use an existing design as a prototype that they can test and mold to meet its potential. In so many ways, starting with any design is better than starting from scratch, which this team had the wisdom to recognize. Instead of being defeated by the recommendation to follow a general existing design, the team learned from the design and made vast improvements — lemonade from lemons, so to speak.

Pictured: The organization chart people can use to find company employees.

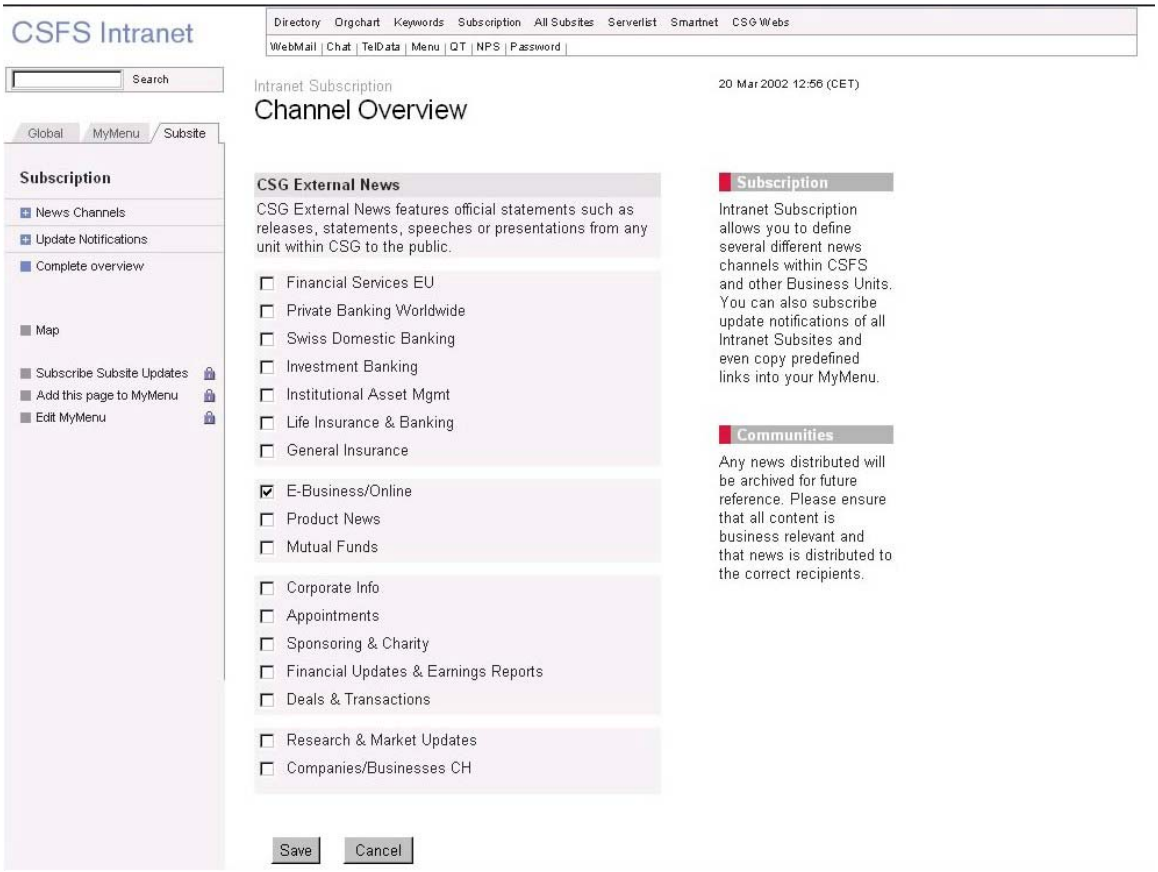


As far as customization, users can choose different subscriptions and channels for their own page. Each subscription is described in full, and focuses on relevant company information. Each subscription also offers various channels that users can choose from.

Pictured: A page that lets users edit their subscriptions and channels.



Pictured: Some of the channels offered.



Search is present and predictable. The navigational elements are obvious and memorable. The overall design is discreet, and the color palette of blues, grays, and white set the stage for a pleasant user experience.

Scoring (3 = best)						
Simple look	Simple navigation	Consistent navigation and design	Visible search	Simple search	Limited (well-presented) text on pages	Home page
2.8	2.3	2.5	3	2.8	2.7	2.8

DESCRIPTION OF THE INTRANET

The CSFS intranet supports four languages — English, German, French, and Italian — and has about one million pages. The main navigation is based on three levels: 1) global navigation, 2) subsite navigation (contextual), and 3) personalized navigation.

MyPortal, the CSFS intranet, is a working tool and information repository. It serves 40,000 CSFS employees with a wide range of jobs and responsibilities. Employees are based in CSFS's Zurich headquarters and in regional offices around the world.

BASIC FEATURES

- Personalized interface

- Dynamic organization chart bound with directory services
- Community-based *News Delivery System*
- News channels based on subscription
- Call-in support center operating twenty-four hours a day, five days a week
- Decentralized network of subsite editors and content providers
- Centralized unit of Key Account Managers

URL AND ACCESS

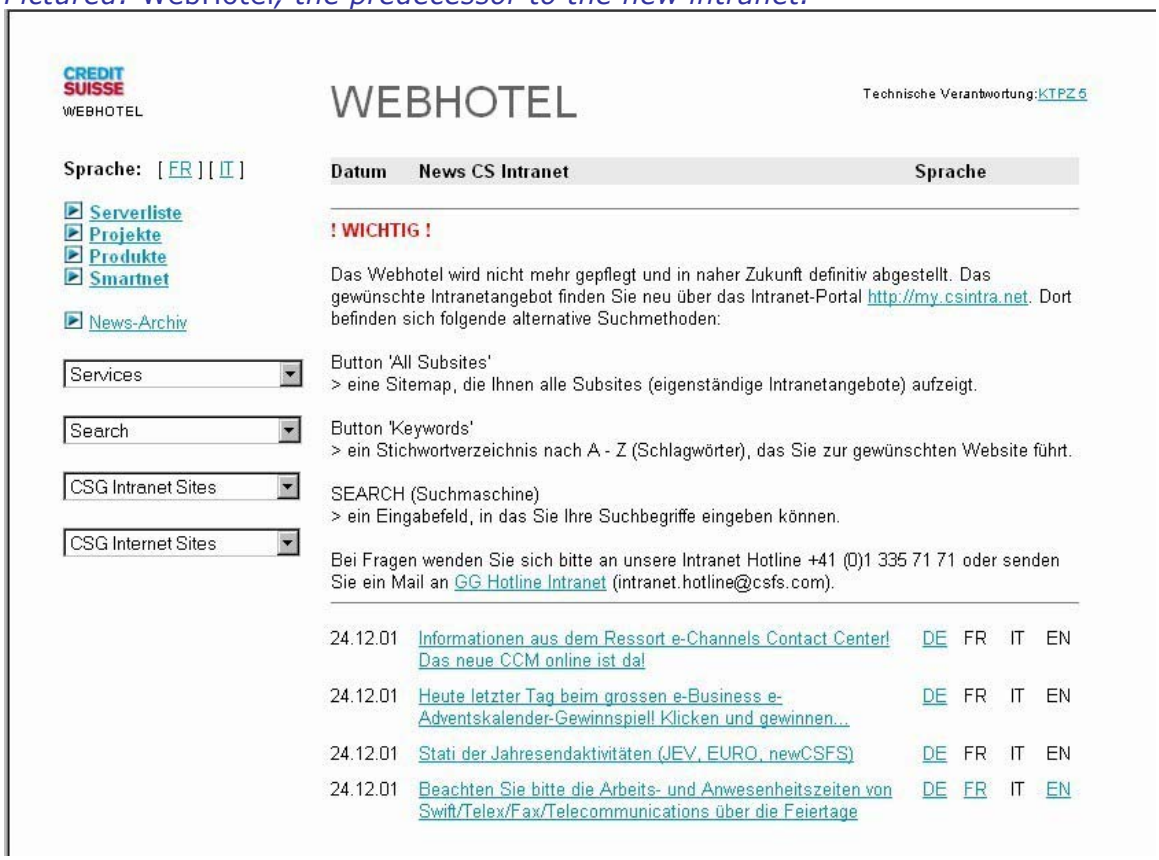
Users access the intranet through a default browser setting that opens the intranet's home page when users open their browsers. Users have to log-in only the first time; after that the system recognizes the machine through a Cookie. Log-in requires that users submit a personal identification number (PID) and a password. Users accessing the intranet from outside the firewall must enter a three-level security log-in (PID, password, and secure ID card). Only a few select employees are allowed to access the intranet that way. The URL is not public; only CSFS employees are allowed to access the intranet.

BACKGROUND

In November 2001, the board of Credit Suisse decided to merge the organization's corporate and private banking units into a single company, Credit Suisse Financial Services. One visible sign of the change would be a single unified intranet; the design team was given until January 2002 to get it up and running. Faced with the requirement to deliver a working intranet in just two months, the team pragmatically decided to use elements from the existing intranets.

The corporate banking unit had a fairly simple intranet known as *WebHotel*, which acted mainly as an information source, giving about 20,000 retail and corporate banking staff within Credit Suisse electronic access to documents, procedures, and so on. It was published in German, French, and Italian — the three main languages spoken in Switzerland — and had its own CMS.

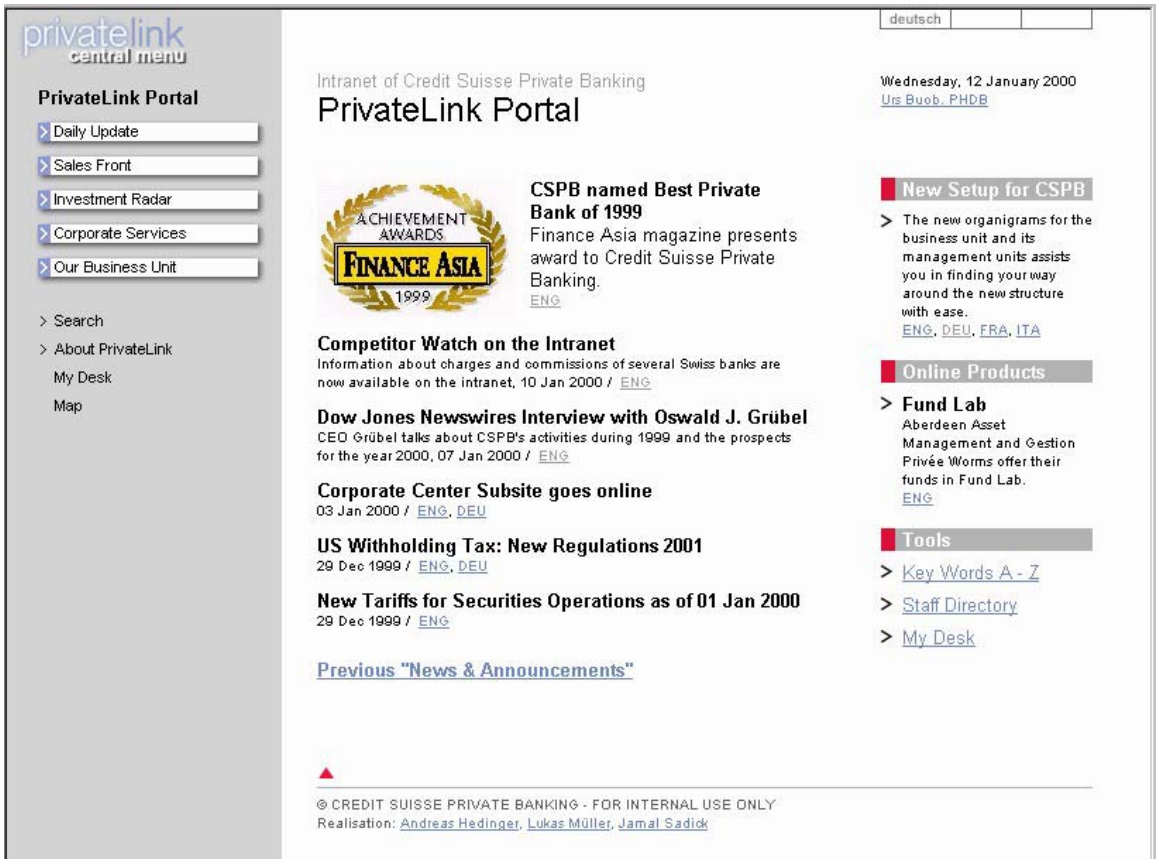
Pictured: WebHotel*, the predecessor to the new intranet.*



The private banking unit, however, had a very different intranet. *PrivateLink,* published mainly in English, served primarily as a business tool for 8,000 relationship managers and other private banking staff. Because private banking employees often have to travel around the world and work from different PCs, this intranet included extensive personalization features allowing users to, for example, set their bookmarks centrally.

"*PrivateLink* was a working tool with applications in it. It was more frequently used than *WebHotel*," says Bojan Blecic, account manager for technology and operations. "*WebHotel* users wouldn't routinely start their browsers up first thing in the morning."

Pictured: The private banking unit's own very different intranet, PrivateLink.



The board saw personalization as a crucial feature. Given the tight schedule, the design team decided to base the new, combined intranet mainly on the look and feel of *PrivateLink*, despite the fact that the bulk of the user base was accustomed to *WebHotel*. "It was a case of technology deciding how people should work," Blecic admitted.

GOALS AND CONSTRAINTS

One of the combined intranet's key goals was to promote effective collaboration between interdisciplinary teams and enable employees to share knowledge. To accomplish this, they set several design goals.

For example, because the combined intranet would hold far larger quantities of information than either of its predecessors, one goal was to optimize information delivery to dedicated target groups through the use of communities. Information would be filtered and delivered only to members of the community for which it was relevant. Other goals included:

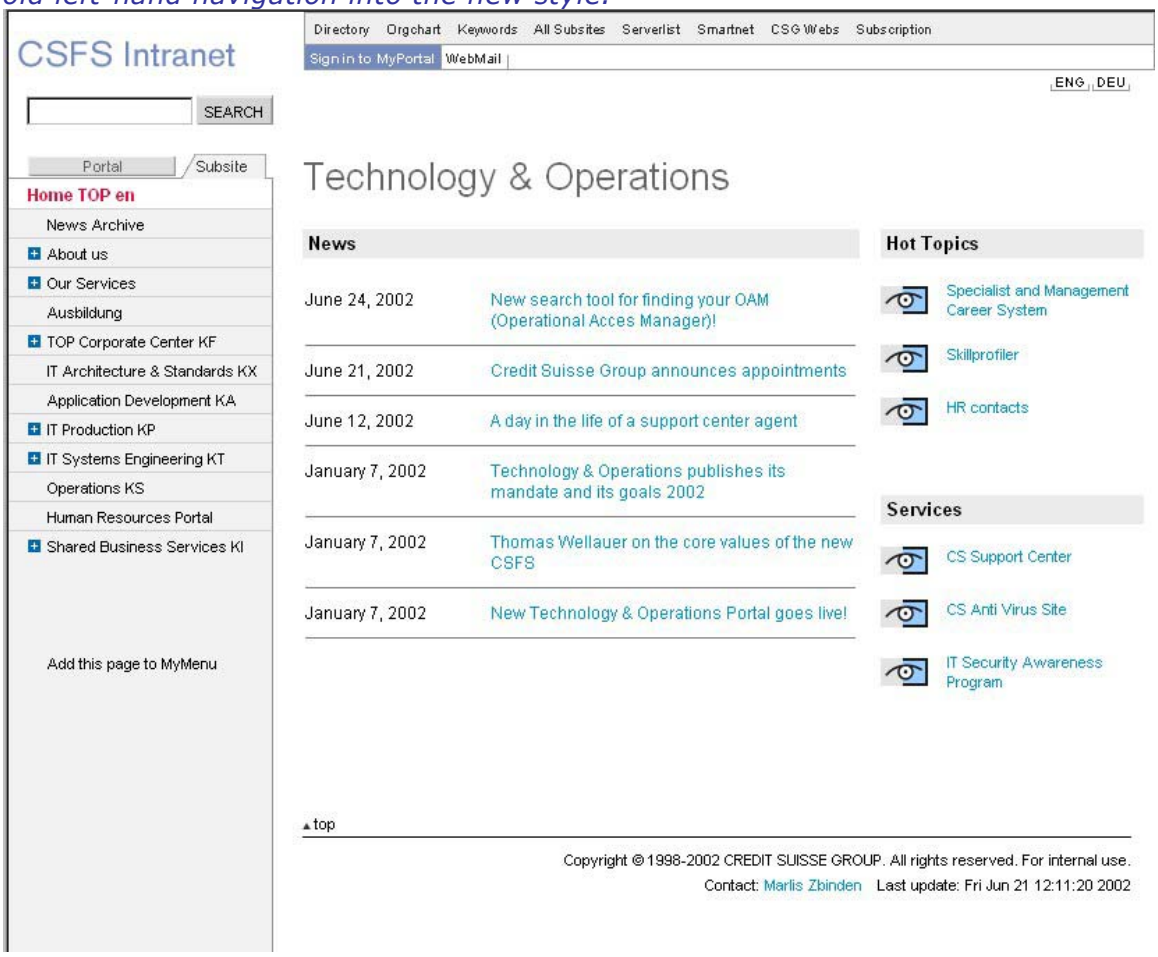
- Provide a solid directory system that would make it easy to locate employees.
- Avoid information overflow through filtering and personalization.
- Enable and promote efficient collaboration and knowledge sharing between interdisciplinary teams.

All of these goals had to be accomplished within the main constraint: a very tight time scale.

DESIGN PROCESS AND USABILITY ACTIVITIES

With no time for user consultation, team members simply took what they saw as the previous intranets' best elements and tried to merge them into a single system. The team created new templates and design guidelines for content managers to use. These can be applied either via the existing *WebHotel* CMS or to basic HTML pages. In some cases, existing *WebHotel* content could be dropped into a new frame. Not all existing content is suitable for this treatment, however, and so far only about a third of the intranet content is displayed using the new look and feel.

Pictured: In this page, existing WebHotel *content was dropped into a new frame that provides the new top menu bar navigation and translates the old left-hand navigation into the new style.*



Given the tremendous time pressure, the team dropped usability testing in the initial development of *MyPortal*. "People had to decide based on their own usability experience what was right and wrong," Blecic says. "Now we're going back and slowly gathering the information we need to fix the main usability problems."

Over the coming months, the team is planning to carry out user studies at both a portal and subsite level, and do a detailed analysis of the intranet log files to find out

what is and isn't being used. However a number of usability issues are already apparent.

The main issue is the culture shock for former *WebHotel* users, who must use a very different content structure in the *MyPortal* site. These users were accustomed to content organized by task. *MyPortal*, like *PrivateLink*, is organized by business, with the left-hand navigation reflecting departments within the organization. "Users tell us they can't find things any more," Blecic says.

For example, the server list that appears as the top item in *WebHotel* navigation is now found in the *All Subsites* link at the top of the *MyPortal* page — not an obvious place for users to look. Furthermore, because there has not been time to change the design of all one million or so subpages, navigation might work differently, depending on where users are in the site. "The navigation looks consistent, but it isn't," Blecic says. *WebHotel* users also face language issues with the new site, which is all in English.

Yet another issue is that links need to be further defined and described. Currently, users can click on a link expecting to jump to an HTML document that will open instantly, and find instead that Acrobat Reader is launching and they must wait several seconds for a PDF file to download.

The new design uses the typography and understated design from *WebHotel*, but the same general layout as the latest version of *PrivateLink*. As discussed above, existing content can be dropped into a standard template, which provides the horizontal navigation at the top of the page and puts the left-hand navigation into a consistent form.

The design team increased the type size from *PrivateLink's* hard-to-read 8-point type to 10 point, as used in *WebHotel*. Links are underlined throughout.

One change from both of the previous versions is a double menu bar across the top. The lower bar shows mainly personalized applications available through the individual's portal page (the exception is *WebMail*, which is available to all employees).

Another change is a move away from the small red boxes featured in the *PrivateLink* design, which user feedback showed were frequently mistaken for check boxes. Although the boxes appeared in the first version of the combined portal, they have been removed from the current version, which came out in summer 2002.

Users are given several ways to access critical information. For example, they can search for people by going straight to the *Directory* link or they can use the dynamic organization chart. Using this chart, which is based on the *WebHotel* organization chart, users can click on employee names to bring up contact details or click on departments to bring up basic information, including a map of each department's location.

Pictured: The new directory organization chart design is based on WebHotel's *old organization chart design.*



The *Topics* column, which takes up about a third of the main portal page, is intended to contain information that is less business-critical, and more general and social. However, the team would like to reduce it. "We think the topics are not as relevant as they look, and that too much surface area is being used for nice-to-have rather than need-to-have content," says Blecic. "We will be trying to convince content owners that this section should be reduced to one topic that will change regularly, making more room for news."

The CSFS intranet has around 400 subsites that users can search in a flexible way: By entering keywords or by skimming through the alphabetical *All Subsites* list.

The concept of communities is fundamental to personalization within *MyPortal*. A network of community managers can build user communities by adding groups of employees according to non-organizational factors such as location, language spoken, type of job, and so on. The news and topics are then pushed to users according to which communities they belong to. Users can also choose to receive certain news channels, so the *MyNews* section on the main portal page will typically be driven on both a push and a pull basis.

Another new feature of the *MyPortal* design is the tabs in the left-hand menu column, which let users switch between the global menu that appears on the general home page, a customizable menu (*MyMenu*) that users can add bookmarks to and so on, and a subsite menu that appears when users select a subsite (10_chann.jpg).

Large sections of the site are still using the old *WebHotel* look and feel. Over time, they will be migrated to the new design.

LANGUAGE ISSUES

Around 70% of CSFS employees are based in Zurich where German, French, and Italian are spoken — a language mix that was reflected in the old *WebHotel* intranet. In *MyPortal*, English is the main language, with some of the content and navigation also available in other languages when users set their preference accordingly. Translation is, however, another pragmatic issue. "It's time sensitive — if we have to get news out quickly we don't always have the time to translate it," Blecic says.

Select site content is also available in other languages, including French, Italian, Spanish, and, most recently, Japanese. When available, alternative language versions of an item are indicated by links at the end.

Language has been one of the major usability issues in combining the two intranets into a single corporate portal. *WebHotel* users accustomed to having their intranet in German, French, or Italian are now typically confronted with a largely English-language front page. With no time to translate all content, however, English speakers can find that a link from the main English *MyPortal* page takes them to content like this, which is still all in German.

TIMELINE

November 2001: Work on *MyPortal* begins.
January 2002: *MyPortal* launch.
February 2002: Intranet team begins review of design and usability issues.

RESULTS

The decision to create *MyPortal* using the *PrivateLink* look and feel made it possible of get the new intranet up and running in two months — an impressive feat. However, it also left CSFS with a lot of disgruntled *WebHotel* users who suddenly found their familiar interface had been taken away. "They lost their own intranet, which was quite different, and had to be reeducated in use of the new one," says Blecic.

Selling the largely Zurich-based corporate banking staff on the benefits of personalization has proven tricky. Because most of them work in the same office, from the same PC, preferences such as bookmarks can easily be set locally, and the advantage of being able to personalize them through the portal wasn't obvious. "They felt their browser bookmarks worked well, and wanted to know how they could import them into the new intranet — which unfortunately isn't possible at the moment," Blecic explains.

Cultural changes will also be needed to fine-tune the personalization strategy; it is not yet meeting the goal of tightly focusing content for those who want it, without overloading those who don't. "It's a people problem, not a technology problem," says Blecic. "We need the community managers to understand the meaning of

communities and how to build them. At the moment, everyone thinks their own news is the most important and wants it to reach the maximum number of employees."

One obvious adverse result of too much information being pushed out to users is that some divisions are threatening to abandon the corporate intranet and build their own subportals where they can display what they feel is more relevant information on the front page. Rather than letting the intranet be fragmented in this way, the team is hoping to introduce community navigation that could be either person- or process-oriented, and enable divisions to display relevant news within the overall *MyPortal* framework.

LESSONS LEARNED

Insights from Bojan Blecic:

Technology isn't a silver bullet. "A content management system won't solve your problems if people misunderstand the rules and put in unstructured, hard-to-understand content. Content management is part of the solution, so is personalization, but educating people is the major challenge."

Uniformity isn't consistency. "A uniform look and feel is different from a consistent look and feel. Consistency, too, is only part of the solution to creating a usable intranet."

Understand the way users think. "The logical model or conventions one person has are just their ideas, not universally applicable. If you want to build a system that has to interact with lots of people, you have to understand their mental structures and allow for their different ways of working."

Northwestern Mutual Life Insurance

USING THE INTRANET:

Northwestern Mutual and its subsidiaries offer an array of financial products. The company was founded in 1857 and now services 2.8 million policy owners holding more than five million policies. In 2002, Northwestern Mutual was again (for the nineteenth year in a row) voted the most admired company in its industry by Fortune magazine.

DESIGN TEAM:

Northwestern Mutual's software product design team

MEMBERS:

MICHELE BERKES, USER-CENTERED DESIGN (UCD) SPECIALIST; MICHAEL DELGAUDIO, USER INTERFACE (UI) DESIGNER; DEBORAH HALL, *MUTUALNET* SITE COORDINATOR; MICK ROSOLEK, UI DESIGNER; MARK BENDER, UI DESIGNER; JUDY HURLEY, UCD SPECIALIST

Pictured: The Mutualnet *home page, which provides navigation across the entire intranet.*



SUMMARY

Mutualnet is the Northwestern Mutual Life Insurance Company's corporate intranet, which serves the specific business needs of approximately 5,000 employees and contractors, plus the many off-site employees in regional real estate offices across the U.S. Users include attorneys, accountants, doctors, actuaries, engineers, and stockbrokers. Operations staff includes people in data entry and processing, customer service, training, and sales support. Marketing and sales departments also have process and product specialists. The Information Systems department alone has over 800 employees.

Mutualnet combines simple design, data collection, and communication all in one place. The home page provides navigation across the entire intranet, and designers chose a Yahoo-like design to provide quick links to heavily used items. The page makes minimal use of graphics, making it fast to load and easy to keep current. The visual design of the page is flexible to accommodate different browser resolutions. The scrollbar on the *Today* column let designers maintain a shorter, more balanced page. This column includes employee-oriented news items as well as weather and traffic information. On the downside, designers report that the single search box, which combines two search functions into one entry box, has not been as well received. The two buttons do let directory-centric users eliminate a click to locate phone numbers, however. Designers are also working to improve the department focused navigation structure.

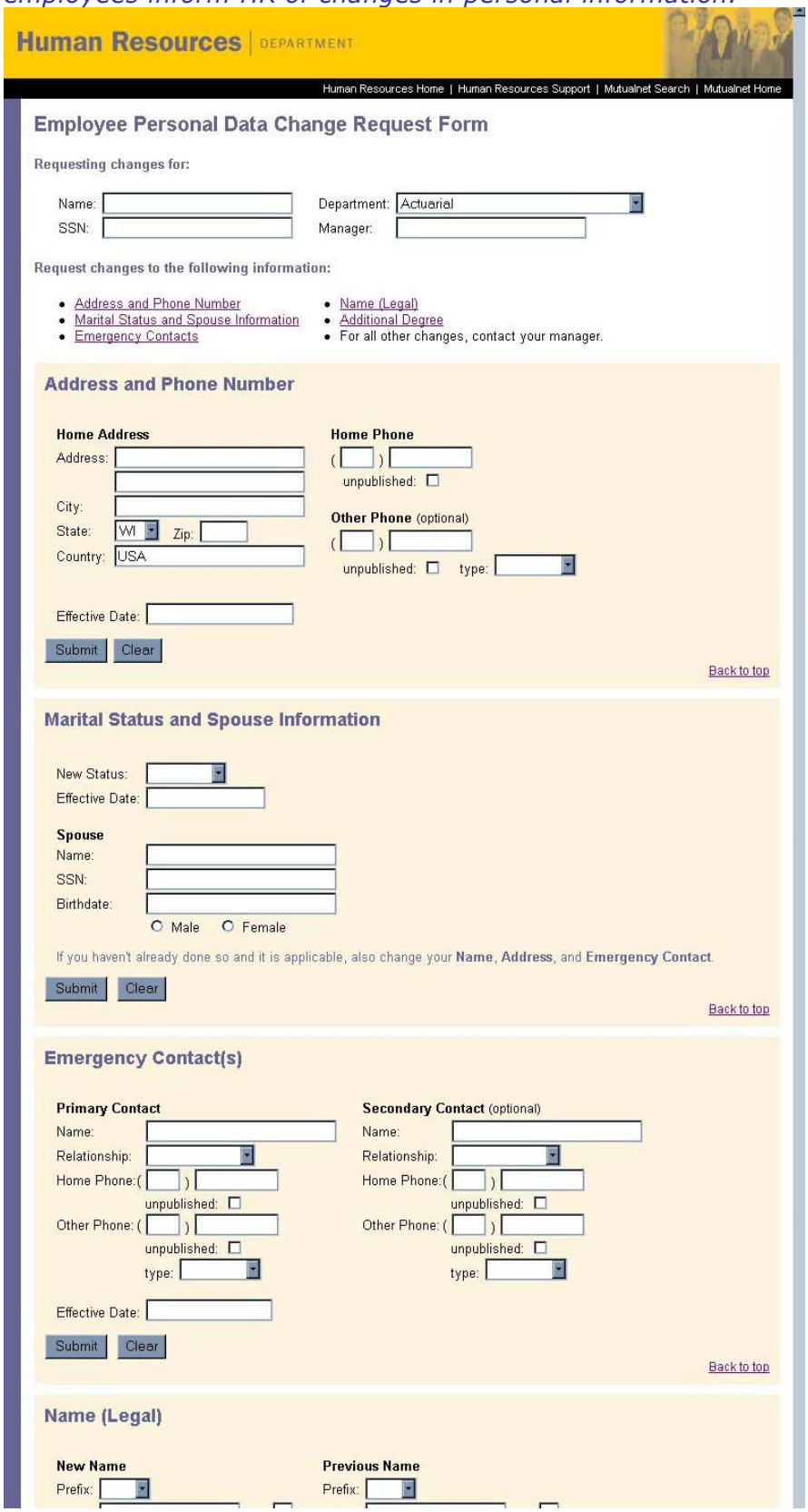
In addition to having design goals of a clean look, fast-loading pages, and consistent navigation across sites, Northwestern Mutual is the only intranet winner that specifically set a design goal dealing with accessibility for user with disabilities. The company focused on testing and adhering to *Priority One W3C Web Content Accessibility Guidelines*.[3] Making it possible for users with disabilities to use the intranet is extremely important, and we've found that making improvements to this end typically helps all other users, too.

At many companies, HR planning and maintenance is at best a quagmire of papers that are copied, faxed, or mailed through the office to whatever HR person you happen to know or find. Northwestern Mutual, however, has implemented a full HR area of the intranet where users not only find benefits information, but can make changes to their electives and personal information. For example, HR offers two forms on their department-level *Mutualnet* site that help eliminate the large chain of paper communication and electronic data re-entry required by their predecessors.

The *Employee Personal Data Change* form lets employees directly inform HR of any changes to their address, name, marital status, and so on. The form is a bit long, but necessarily so, and it is well laid out, with obvious fields and field labels.

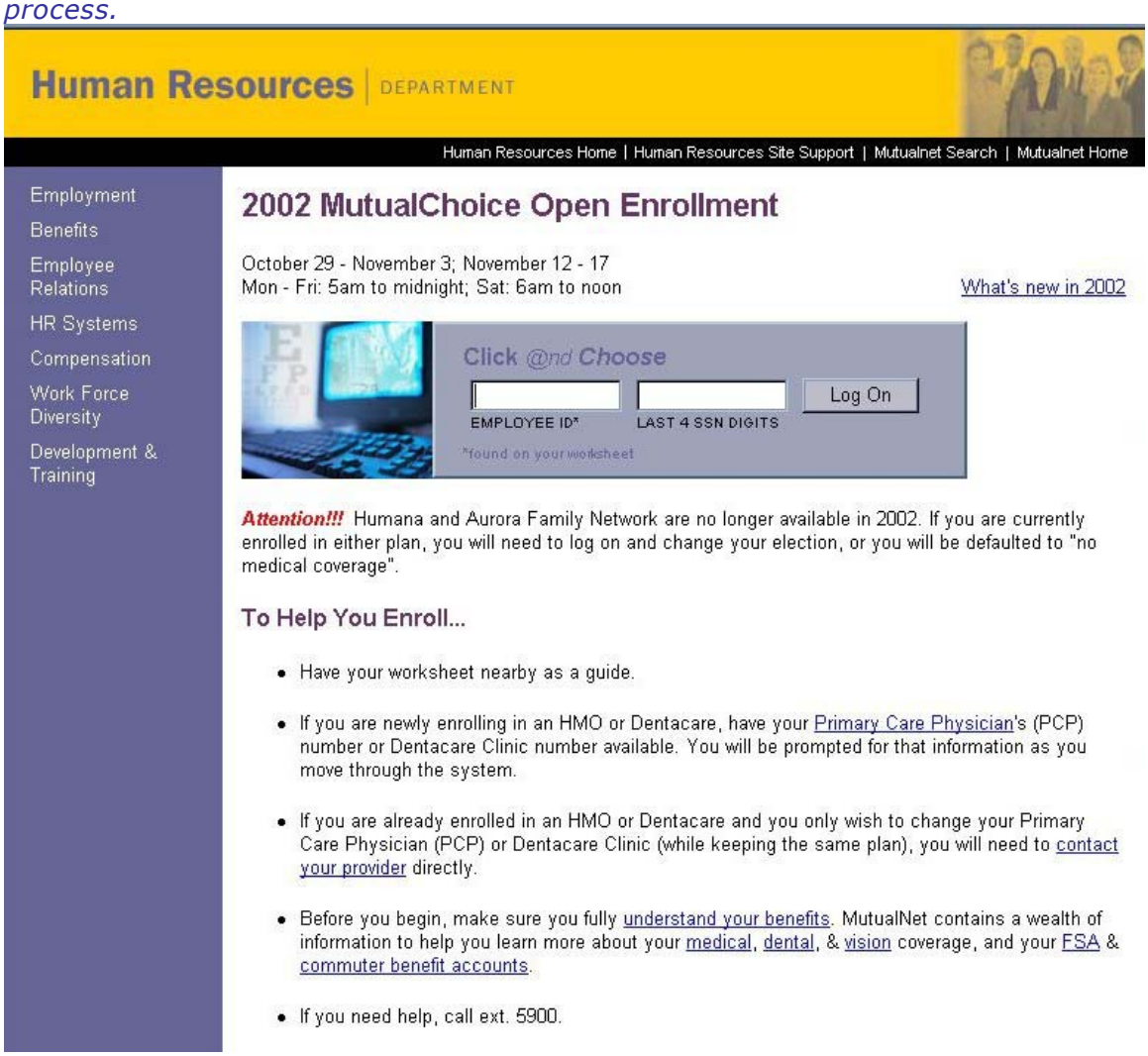
[3] W3C Web Accessibility Initiative, guidelines at http://www.w3.org/WAI/Resources/#gl. See also the Nielsen Norman Group report with usability accessibility guidelines, *Beyond ALT Text: Making the Web Easy to Use for Users with Disabilities* (Coyne, Nielsen) www.nngroup.com/reports/accessibility.

Pictured: The Employee Personal Data Change *form, which lets employees inform HR of changes in personal information.*

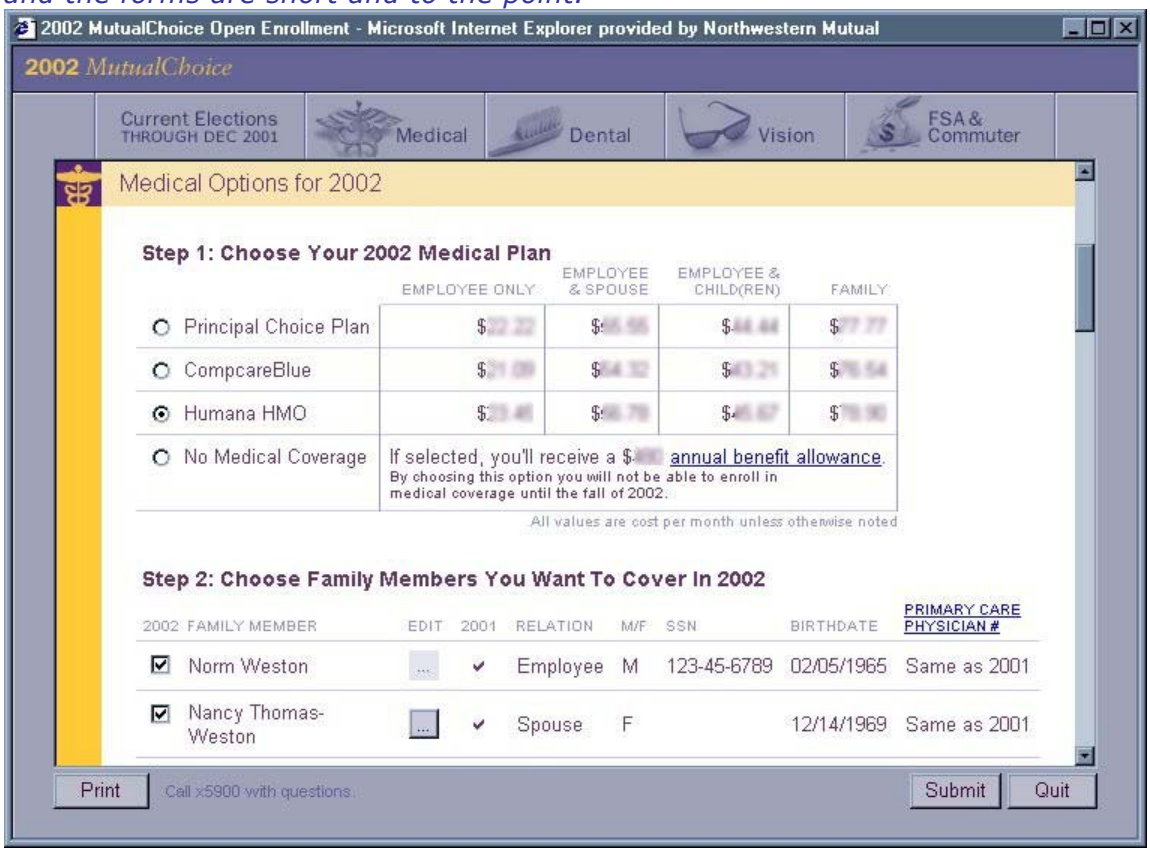


The *Open Enrollment* forms let employees view and directly modify their benefit options. There are two very nice features in this process. First, data is automatically batch-processed nightly, so there is no extra administrative hassle and HR representatives have timely information. Second, employees need various items or information on hand before they can actually go through the forms. Rather than hitting users with a "gotcha" in the middle of the process, designers had the expertise to give users a list and explanation of the information they need to complete the forms before they even begin. This is an innovative way around a common form problem.

Pictured: A page beginning the Open Enrollment *process, which lets employees view and modify their benefit options. This first page helps users get started and tells them what they will need to complete the process.*

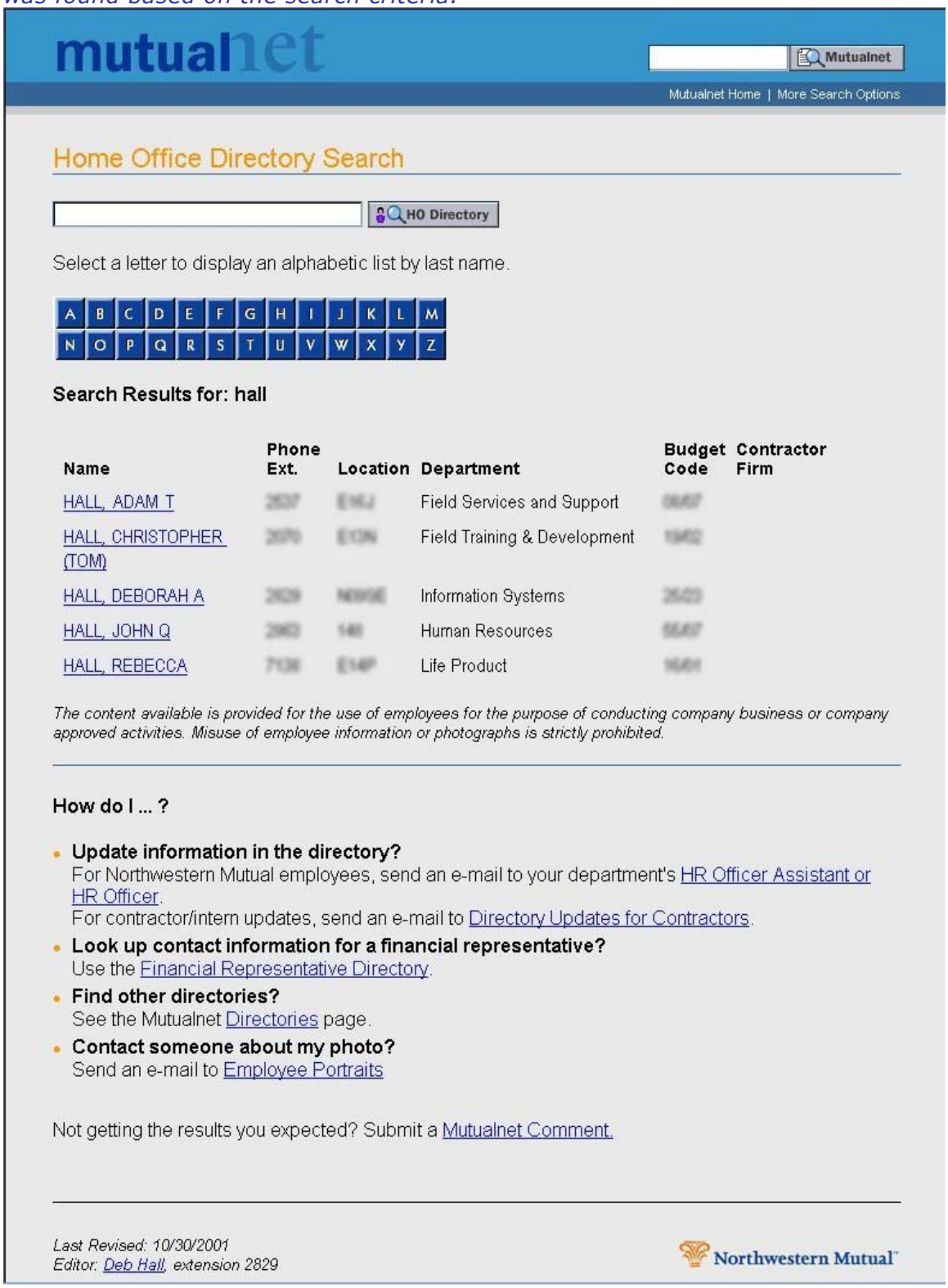


Pictured: A form within the Open Enrollment *process. It is well laid out, and the forms are short and to the point.*



Like many intranets, Northwestern Mutual's offers an employee directory. However, their design is innovative in that it takes information that is currently available from several different resources and combines it into one, making it faster and easier to find people at the company. The directory search lets users type a name or browse by letters. If a search returns one unique result, the result displayed is a detailed page including the employee's photograph. If more than one match is found, a page listing the possible matches, including name, phone number, location, department and division, and budget code is displayed. Regardless, the results show the most important information for the users. Knowing that the *Home Office Directory* is a frequently used featured, the designers usability tested it, and in the course of the usability evaluation gathered information about what other information users expected or needed there. They then used the information to make sure that the details given on the intermediate list page were those most pertinent to users. In addition to the directory, designers created the *How Do I* section in part to help direct users to other site resources.

Pictured: An employee directory search results page. More than one user was found based on the search criteria.



mutualnet

Mutualnet

Mutualnet Home | More Search Options

Home Office Directory Search

HO Directory

Select a letter to display an alphabetic list by last name.

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

Search Results for: hall

Name	Phone Ext.	Location	Department	Budget Code	Contractor Firm
HALL, ADAM T	[illegible]	[illegible]	Field Services and Support	[illegible]	
HALL, CHRISTOPHER (TOM)	[illegible]	[illegible]	Field Training & Development	[illegible]	
HALL, DEBORAH A	[illegible]	[illegible]	Information Systems	[illegible]	
HALL, JOHN Q	[illegible]	[illegible]	Human Resources	[illegible]	
HALL, REBECCA	[illegible]	[illegible]	Life Product	[illegible]	

The content available is provided for the use of employees for the purpose of conducting company business or company approved activities. Misuse of employee information or photographs is strictly prohibited.

How do I ... ?

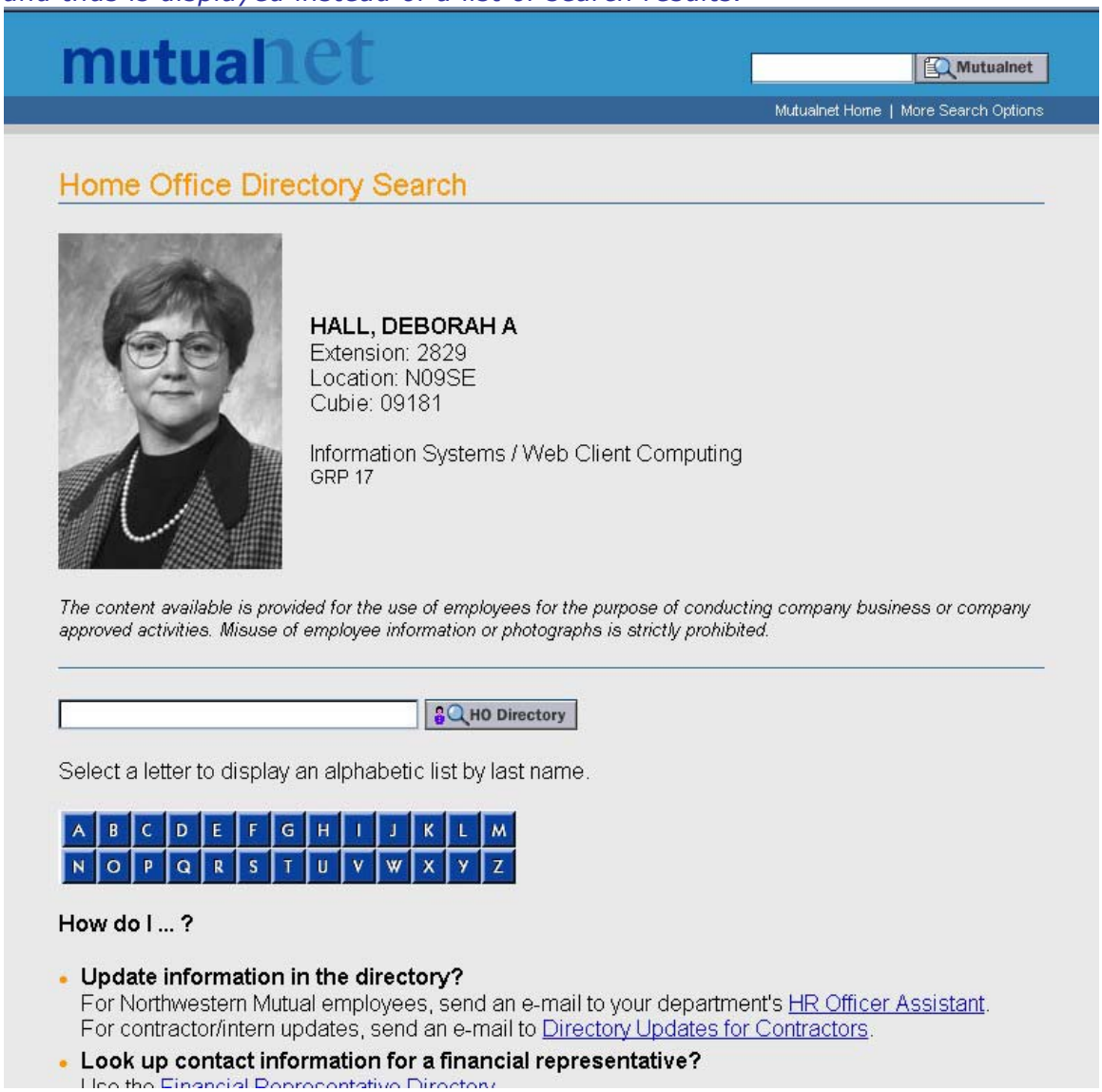
- **Update information in the directory?**
  For Northwestern Mutual employees, send an e-mail to your department's HR Officer Assistant or HR Officer.
  For contractor/intern updates, send an e-mail to Directory Updates for Contractors.
- **Look up contact information for a financial representative?**
  Use the Financial Representative Directory.
- **Find other directories?**
  See the Mutualnet Directories page.
- **Contact someone about my photo?**
  Send an e-mail to Employee Portraits

Not getting the results you expected? Submit a Mutualnet Comment.

Last Revised: 10/30/2001
Editor: Deb Hall, extension 2829

Northwestern Mutual

Pictured: An employee's results page. This page is a unique search result, and thus is displayed instead of a list of search results.

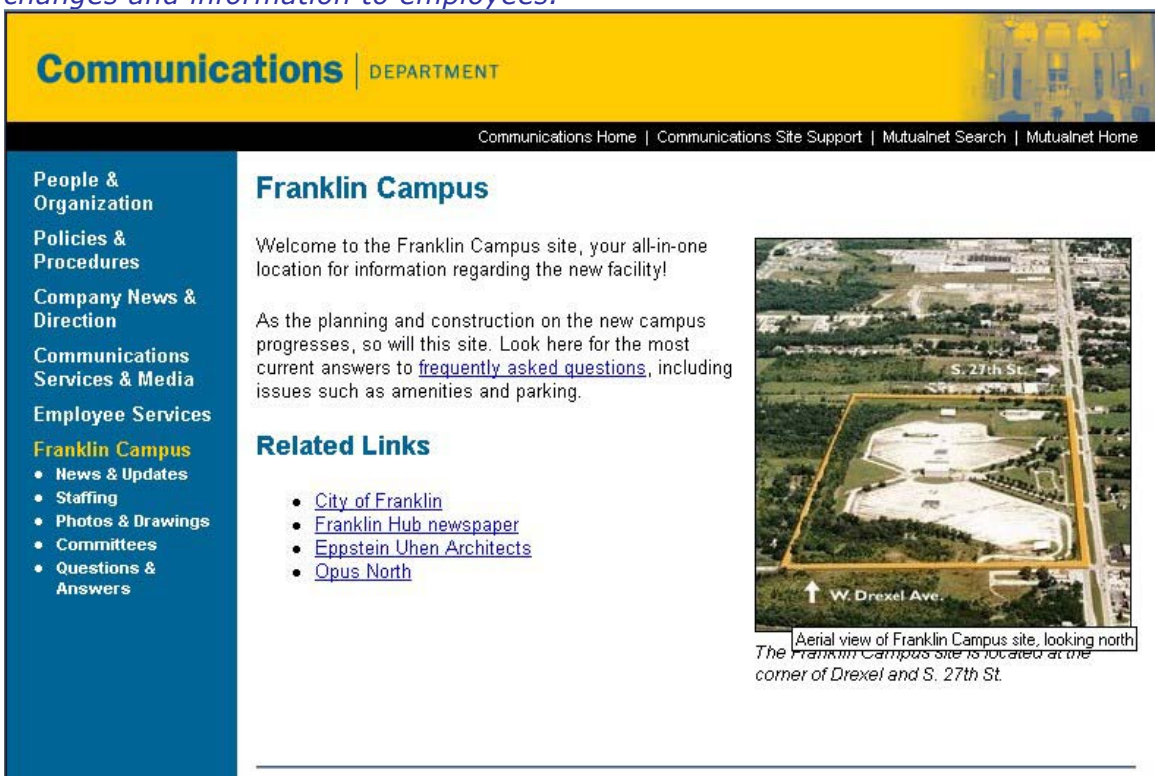


Aside from small news bits and letters from the CEO, many intranets miss the opportunity to communicate current information to employees. Northwestern Mutual, however, has taken the opportunity to use the intranet to communicate about a delicate topic: a new facility design.

Having your office arrangement and architecture change can be exciting. Many people, however, feel stress with such changes and the worst thing a company can do in this situation is to withhold information about the changes. Thanks to the intranet, the opposite is true at Northwestern Mutual. Information is posted thoroughly and regularly, using the *Franklin Campus* site, an all-in-one location for information regarding the home office's new campus expansion. As the planning and construction on the new campus progresses, so does the site. Employees can look for the most current answers to questions about things like amenities and parking excerpted in a FAQ document. But a FAQ is the not the whole story. Employees can also ask their own questions and receive individualized answers via the Franklin

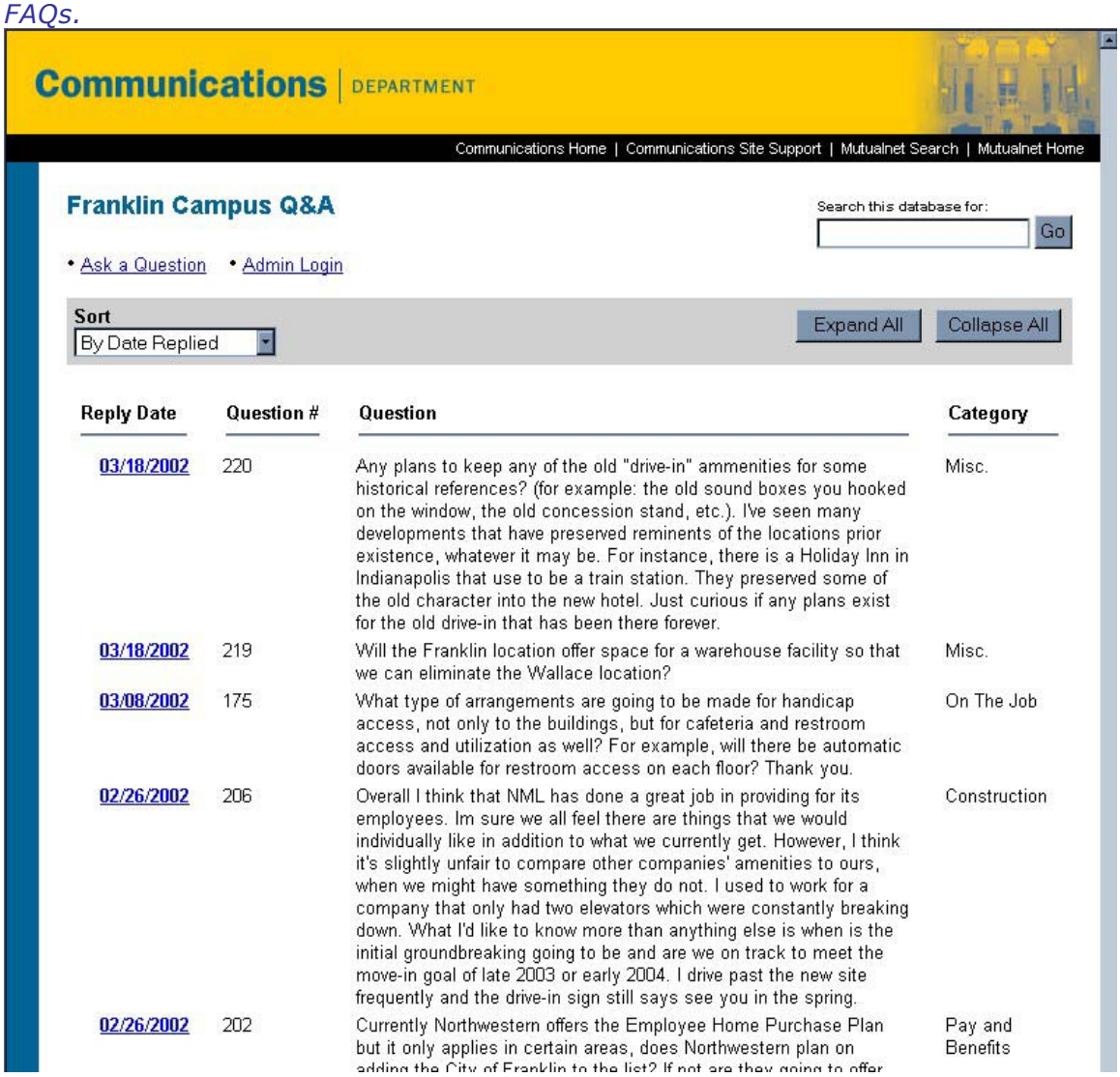
Campus Q&A Domino application. The Communications department also made maps, plans, and drawings available on the intranet. Taken together, such features have successfully alleviated employee concerns and inaccurate grapevine information by providing more direct communication between employees and management. Now, employees can look forward to the changes with anticipation and excitement.

Pictured: The first page of the new campus site, used to communicate changes and information to employees.

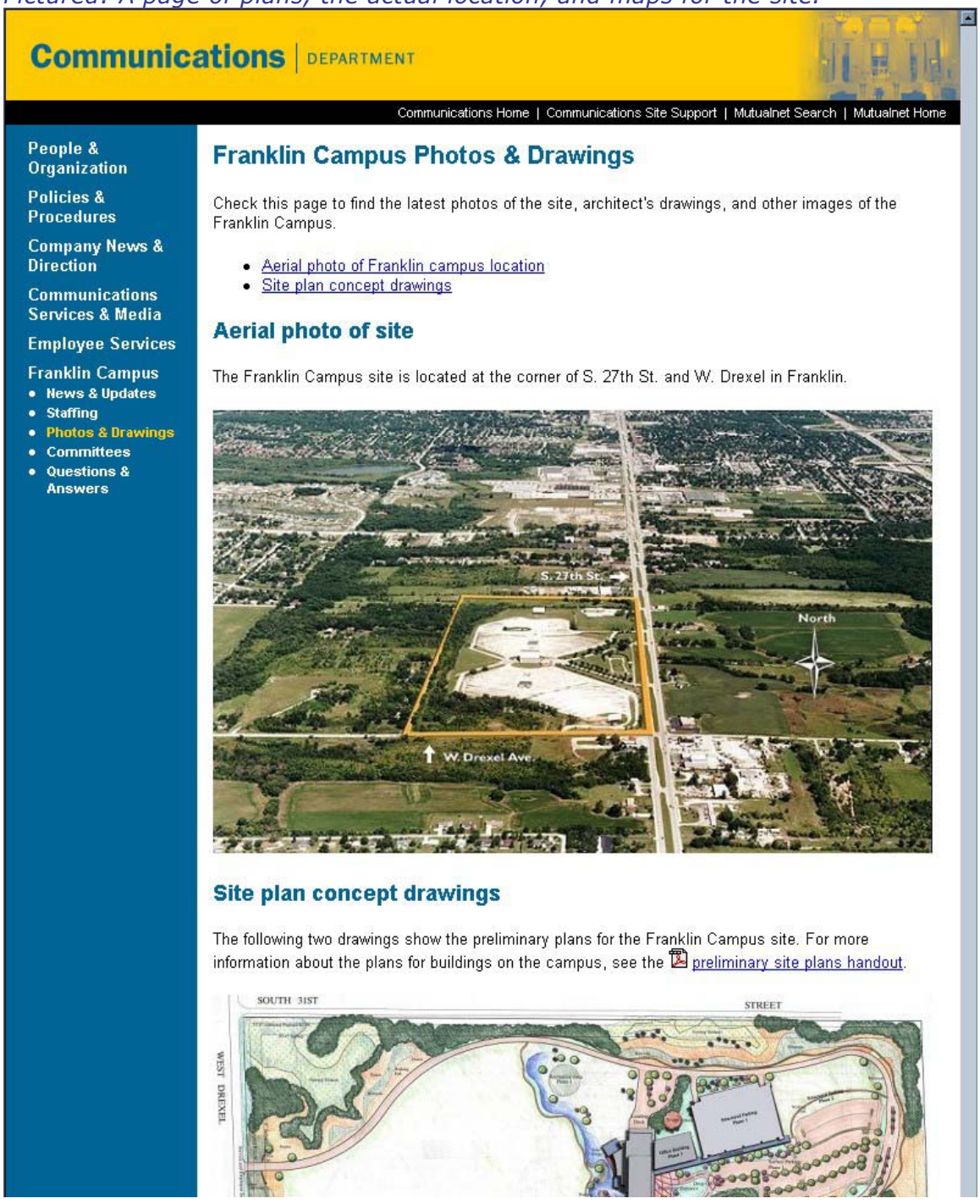


The Franklin Campus site is located at the corner of Drexel and S. 27th St.

Pictured: The Question and Answer *page allows users to ask their own questions about the changes. This is a much better alternative to stale FAQs.*



Pictured: A page of plans, the actual location, and maps for the site.



Scoring (3 = best)						
Simple look	Simple navigation	Consistent navigation and design	Visible search	Simple search	Limited (well-presented) text on pages	Home page
3	1.5	1.8	3	2.5	2.3	2.3

DESCRIPTION OF THE INTRANET

Mutualnet is composed of a community of home office department subsites with an umbrella enterprise layer. The intranet resides across thirteen servers, including more than 150,000 pages plus applications. First implemented in 1996, it has been through four revisions. Currently, *Mutualnet* adds approximately 1,000 pages of content per month.

BASIC FEATURES

Mutualnet's top layer is considered the enterprise level. These are the pages that provide navigation across the entire intranet. The redesigned site uses global and local Cascading Style Sheets to ensure branding and best practices consistency across subsites. Creative content and color palettes let each subsite illustrate its uniqueness within the *Mutualnet* community, while communicating an identity with the Northwestern Mutual brand. There are two standard navigation areas in the page structure: global navigation and site navigation. Site navigation provides a "you are here" functionality. Designers encourage consistency in site navigation labels across subsites. A scoped search box is available on subsite home pages, and all pages include a global navigation bar with a link to the full site search. All pages must have metadata titles and descriptions, and all graphics require Alt tags. All branded sites are link and spell checked, and monthly reports are run for content owners.

Types of content/applications include:

- Forms to initiate various internal processes
- Daily company news column, company newsletter (*Coverage*), department newsletters
- Policies and procedures — A to Z, standards, guidelines
- Online training, scheduled training calendar, professional development
- Computer help desk, password change, software downloads, contacts
- Third-party news and research links
- Employee self service — job postings, 401K, benefits enrollment
- *Home Office Directory* with photos and other directories
- Company calendar of events
- Project and Competency Center databases of documents and team collaboration
- Weather and commuter information links
- Interactive Q&A, bug trackers, minutes and agenda databases
- Job aids and documentation
- Clubs, lunch menu, special discount offers, credit union
- Business and leisure travel information

URL AND ACCESS

Employees must be authenticated, of course, to access home office systems, but *Mutualnet* itself has no separate log-in. After successful user authentication,

Mutualnet is generally available. Certain applications or sections of information do have restricted user groups, and users in those areas must reauthenticate. The designers are piloting a project called *Mutualnet Anywhere,* which will let employees access a limited subset of *Mutualnet* content from home. Employees will, of course, need to authenticate to get into *Mutualnet Anywhere*.

BACKGROUND

The first version of *Mutualnet* appeared in 1996, having grown out of a previous intranet created for Northwestern Mutual's sales force. Initially, the rationale for having the intranet was simply to make corporate information more accessible by putting policy and procedure manuals online. Since then, the intranet has been through four revisions, including a major redesign that was launched in 2000 following an extensive usability review.

Pictured: A page from Mutualnet's *major redesign in 2000, based on usability evaluations.*



In 2001, all intranet department and club sites were redesigned. In 2002, redesign of forms, applications, and Domino databases will begin. It will take approximately two years to complete these conversions; they are currently converting over 1,000 pages per month.

Many of the intranet revisions were motivated by user feedback. As information volume grew, respondents in Northwestern Mutual's annual survey of intranet users started to complain about difficulty in finding what they wanted. Many were unhappy with the search facility, which by default delivered a search of the head office directory rather than the whole site. The team was also becoming aware of a lack of uniformity across the site's different departmental areas.

Meanwhile, in 1999, Northwestern Mutual's board had decided to introduce a new brand identity throughout the organization, including the intranet. During 2001, the design team received funding to bring *Mutualnet* into line with Northwestern Mutual's corporate branding standards. The designers decided to take the opportunity to introduce a simpler, more consistent site design that would increase user productivity and reduce the maintenance issues involved with diverse designs.

"As we had to touch every page anyhow to apply the corporate branding, we felt that we could use Web best practices to improve usability of the site," explains Deborah Hall, *Mutualnet* site coordinator. "We've found that consistency is good for the user; it helps them focus on content rather than navigation."

Content publishing is still done manually, with all content passing through a central group that applies corporate design standards and turns content into HTML files. Northwestern Mutual does, however, plan to move to automated content management by 2004.

GOALS AND CONSTRAINTS

Mutualnet exists to meet three overall goals: improve both individual and organizational productivity, provide a reliable centralized information source, and act as a platform for collaborative applications.

The aim of the 2001 restructure was to create a unified site with a simple, clean, and consistent design. By increasing consistency across the site, the team hoped to make it easier and therefore more efficient for employees to use, thereby increasing corporate productivity and reducing design costs.

Since Northwestern Mutual has a number of employees with impaired vision, another aim was to comply with *W3C Web Content Accessibility Guidelines* by making pages suitable for screen-reading devices.

The new corporate branding guidelines dictated several design elements, such as the use of photographic images in the menu bars. But the guidelines have been a benefit as well as a constraint for the team. "If we didn't have the corporate initiative to brand the site, I'm not sure we'd have had the same amount of credibility about going in and requiring that standards be met," Hall says. "We do have people complain about things like the color palette, but I can point out that it's beyond my control. It's mandated by corporate standards."

Other *Mutualnet* goals include:

- Improve organizational and personal productivity.
- Provide an enterprise collaboration platform.
- Provide a centralized source for quality data and information.
- Minimize use of graphics to speed load times.
- Use simple, clean, and consistent design to reduce design costs and improve usability and user satisfaction.
- Adhere to and test *Priority One W3C Web Content Accessibility Guidelines.*
- Ensure consistent navigation across sites to shorten task completion and learning curve.

DESIGN PROCESS AND USABILITY ACTIVITIES

In spring 2001, the team received signoff from Northwestern Mutual's branding committee for the redesign, and started work on the page design and information architecture in parallel. Before the 2000 launch of the redesigned *Mutualnet* portal site, the design team had carried out a major usability exercise, using techniques such as brainstorming with user groups, card sorting, prototyping, and several rounds of usability evaluations and user feedback. The team used these usability findings as the basis for developing the new version.

The team also carried out a comparative usability exercise using Northwestern Mutual's usability lab, which has a video facility with video cameras that can film the user's face, keyboard, and screen. The lab is used for both enterprise application interface development and Web design. For the *Mutualnet* project, team members ran tests both before starting the redesign and again when the new version went live, giving users a range of tasks to complete. They then compared user responses across various parameters (the tests are described further in the *Results* section below).

A core working group of ten people, including the design team and representatives from various business departments, spent six months working through the intranet sections developing standards and information design.

It was an evolutionary process. "The information design evolved as we found chunks of information that didn't fit in," Hall says. "At the end of the process, we had developed some more sophisticated thinking, so next year when we fine-tune the branding, we're planning on going back to the early sites and tightening up the information design, too."

The resulting information architecture is already delivering benefits to both users and content providers.

"For example, the fact that we now have a taxonomy of navigational terms provides a comfort level for users," Hall says. "They know that under *People* And *Organization* they will always find an organization chart, mission statements and so on, and that improves productivity, because the user is not trying to learn everyone's language. The reverse is also true: departments don't have to waste time having to decide what words to use for the navigation. Instead of solving the same problems over and over, they can focus on improving content."

Finalizing the designs took about four months of negotiation with the company's internal designers. "To be polite, you could say it was iterative," Hall recalls. "It was a classic clash between usability people, wanting a flexible design that would work with a fixed page width, and graphic designers who were used to having absolute control over the look of a page."

Fortunately for the intranet team, the corporate branding also worked well on the Web. "The very squared off look is a branding element," explains Hall. "When we took it to the Web we found it worked well; the simple, chunked-up screen helped people understand what was in the various boxes."

The team also worked to add elements that made sense to both groups. "We felt strongly about putting in global navigation as well as having search on all pages," says Hall. "By having this simple design controlled by CSS we can reduce design time and focus on content."

Now that the site is live, the team uses the annual user survey and monthly *WebTrends* reports to continually refine the home page content. For example, each main heading leads to a secondary page with a listing of all *Mutualnet* resources related to that topic, and the most commonly accessed pages are listed as subtopics on the home page.

The current home page retains many elements of the 2000 home page, including the high proportion of the page devoted to navigation. "There are people who feel that news should take up two thirds and navigation one third. But we feel that navigation is more important than news, because it bubbles up content that users might not otherwise be aware of," Hall explains.

The weather forecast is still a prominent home page feature because of the region's extreme weather and the geography of Northwestern Mutual's offices. "We're in five different buildings, so we need to know if we have to put a coat on to go for a meeting with our colleagues in another office," says Hall.

The team sees this kind of practical information, along with commuter information and details of the lunch menu, as helping to draw users into the intranet by telling them things they want to know on a daily basis.

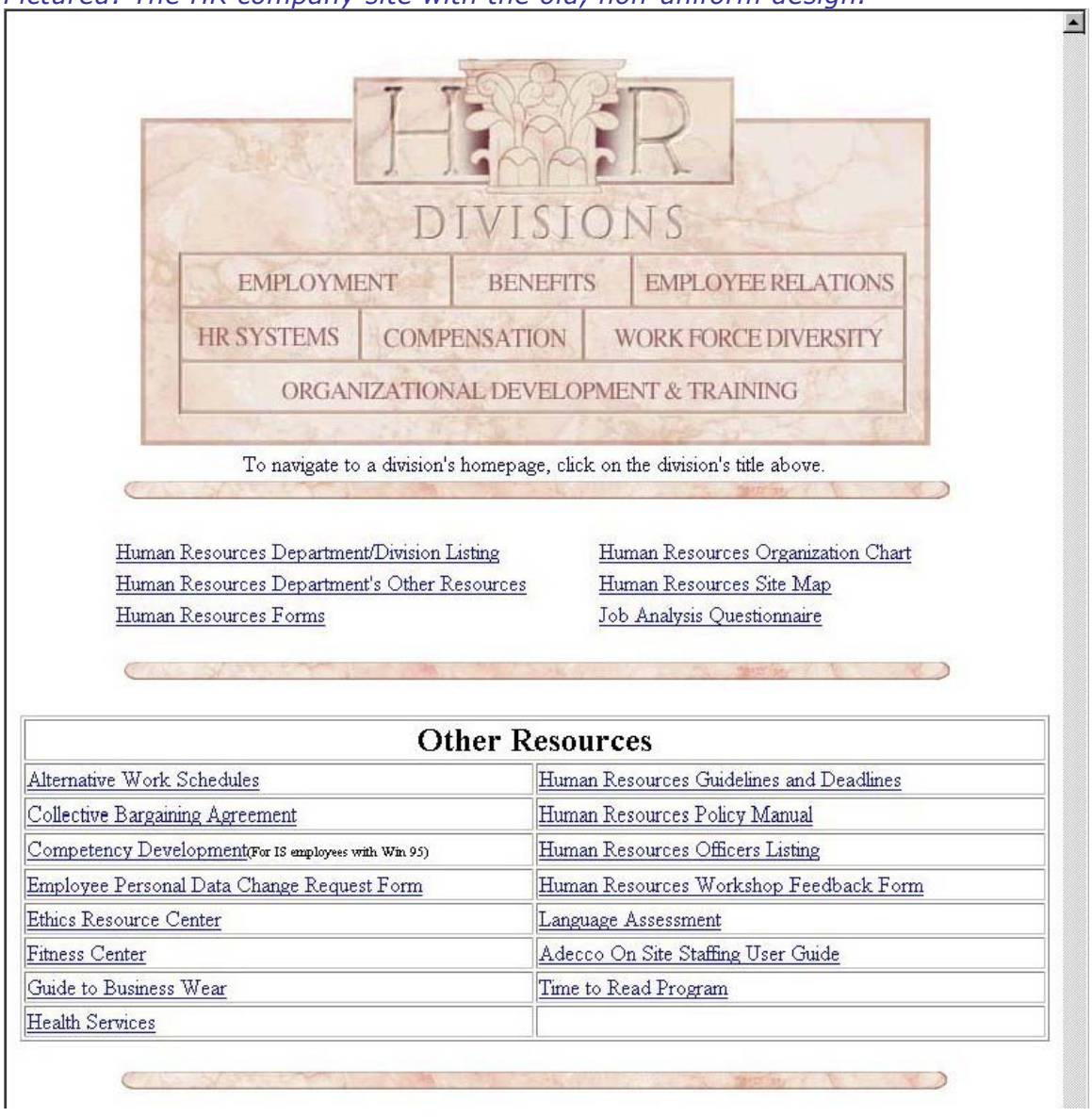
One change has been to the search function, which now explicitly offers users the choice of directory and site search, but the team still isn't entirely happy with the solution. "We went through four or five proposals for the search, none of which was obviously the fix," Hall says. "The trouble is that if users click *Return* in the heat of the moment, it still goes to the default, which is directory search. So we're examining options like splitting the boxes or letting people set their own search preferences."

Unlike the previous version, the home page now features a scrollbar on the news column to avoid having large volumes of news in a long, thin left-hand column and white space on the right. Hall is aware that this change may raise eyebrows in usability circles, but explains: "The common idea is that people don't want to scroll, but if there's something they want to scroll to, they will. We had people look at it and test drive it and got favorable results doing that."

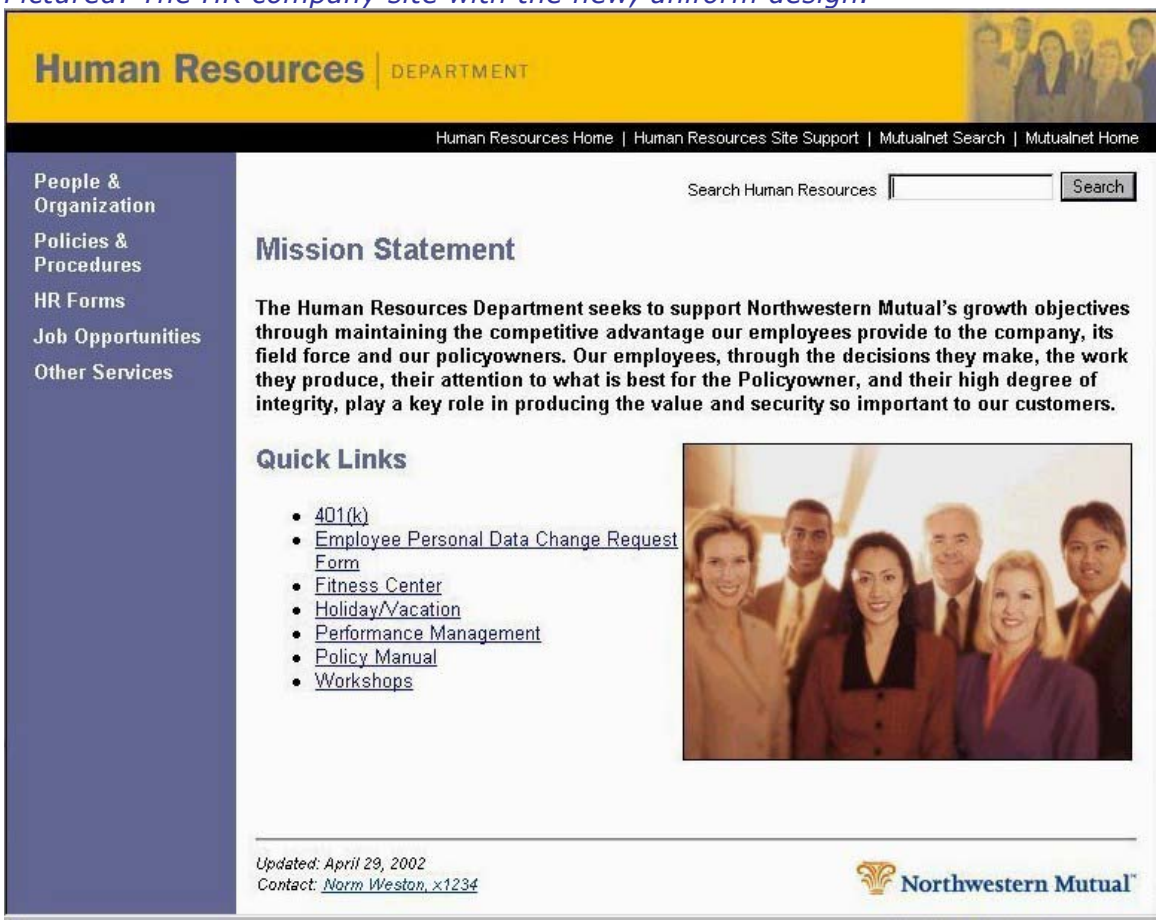
In line with its aim of moving away from a department-focused navigation structure, the team relegated navigation by department to the bottom of the page. "Departmental navigation is still wanted by some users, but we hope to eventually move this level of navigation deeper," Hall says.

The most radical change has been to subsite pages, where team members replaced a wide diversity of old designs with a uniform, and more professional, look and feel. They applied this new look to both company sites and sites for the wide range of company-sponsored clubs.

Pictured: The HR company site with the old, non-uniform design.



Pictured: The HR company site with the new, uniform design.



One of the new branding guidelines was to use photos rather than clipart on company material, focusing on images of people rather than objects and thus emphasizing human relationships as one of the company's core values. The team selected images for the subsite pages' top menu bar in cooperation with the departments concerned. One department, *Policy Owner Services,* uses photos of actual employees, which are changed on a monthly basis.

TIMELINE

- 1996: Original *Mutualnet* launched.
- 1997 and 1998: Additional features added.
- 2000: Significantly new design introduced, intended to provide a more functional look at information.
- 2001: Funding received to apply corporate branding. Departmental and club sites redesigned (the company funds thirty clubs as benefits for employees; women's golf is one example).
- 2002: Work starts on redesign of electronic forms, applications, and Domino databases. Converting existing information is expected to take about two years, at a rate of around 1,000 pages per month.

RESULTS

Because the design team needs solid figures to convince Northwestern Mutual's hard-nosed management to invest in further development, it pays close attention to measuring the site's business benefits. "Measurable benefits are so important to getting future funding that we'd be foolish not to do metrics at this point," Hall points out. Metrics are mined from server logs, annual user surveys, benchmarking outside organizations, and on-site usability testing. In 2001, the team measured the following attributes:

- Users' level of intranet use and satisfaction
- Timesavings
- Information credibility
- Contribution to productivity
- Individual ROI studies on new features
- Pain points for users

Although there has been some user resistance to change, it is balanced out by growing recognition that a consistent design is easier to work with: "People grumble, but people grumble at just about any change," says Hall. "Quite early on we started to get feedback that the redesigned pages were easier to navigate through, so when were we going to finish the redesign of this and that department?"

According to the team's most recent user survey: 94% of respondents used *Mutualnet* daily or multiple times each day, 95% thought it was an honest and credible source of information, and 87% said that it contributed to their job performance.

In addition to holding the annual intranet satisfaction survey, team members benchmarked the whole site during 2001 using thirteen different test scenarios and three key measures: success at completing tasks, time taken to complete tasks, and number of clicks involved. They ran the same test again in 2002 on the new site, using nine testers each time. On both occasions, the team recorded users on video in Northwestern Mutual's usability lab.

Initial results (the team is still carrying out further analysis) show that, though the number of clicks remained the same, test users took 20% less time to complete tasks, and the number of times users gave up and failed to finish the task at all was reduced from 9% to 1%.

"We're pretty pleased with that," Hall says. "We're going to use those numbers to try and justify more money so we can carry out further enhancements next year."

The team has now been given the task of developing an extranet for the field sales force, which Hall sees as an endorsement from the top: "Clearly we've got some credibility with management, seeing as they're trusting us to do it again!"

LESSONS LEARNED

If you want people to find something, put it on the same page as the lunch menu. "If you want people to use the site, you need to provide information they

want to see. Adding softer information, such as the lunch menu and weather and commuter information, draws people in," says Hall.

Make changes gradually. "We had a lot of unhappiness among our users when we moved to a more Yahooish look. It was too radical a change, and they couldn't find what they wanted. So the change from 2001 was more subtle. We've found that the best approach is to make small significant changes, but to keep them coming so people don't get entrenched," advises Michele Berkes, a UCD specialist at Northwestern Mutual.

You can never rest on your laurels. "As soon as you improve something, the users raise the bar and expect more," says Hall.

Washington Mutual, Inc. and Towers Perrin

USING THE INTRANET:

With a history dating back to 1889, Washington Mutual, Inc., is a financial services company that serves consumers and small to mid-sized businesses in all 50 states. Through subsidiaries, the company engages in the following business activities: Consumer Banking, Mortgage Banking, Commercial Banking, Financial Services, and Consumer Finance.

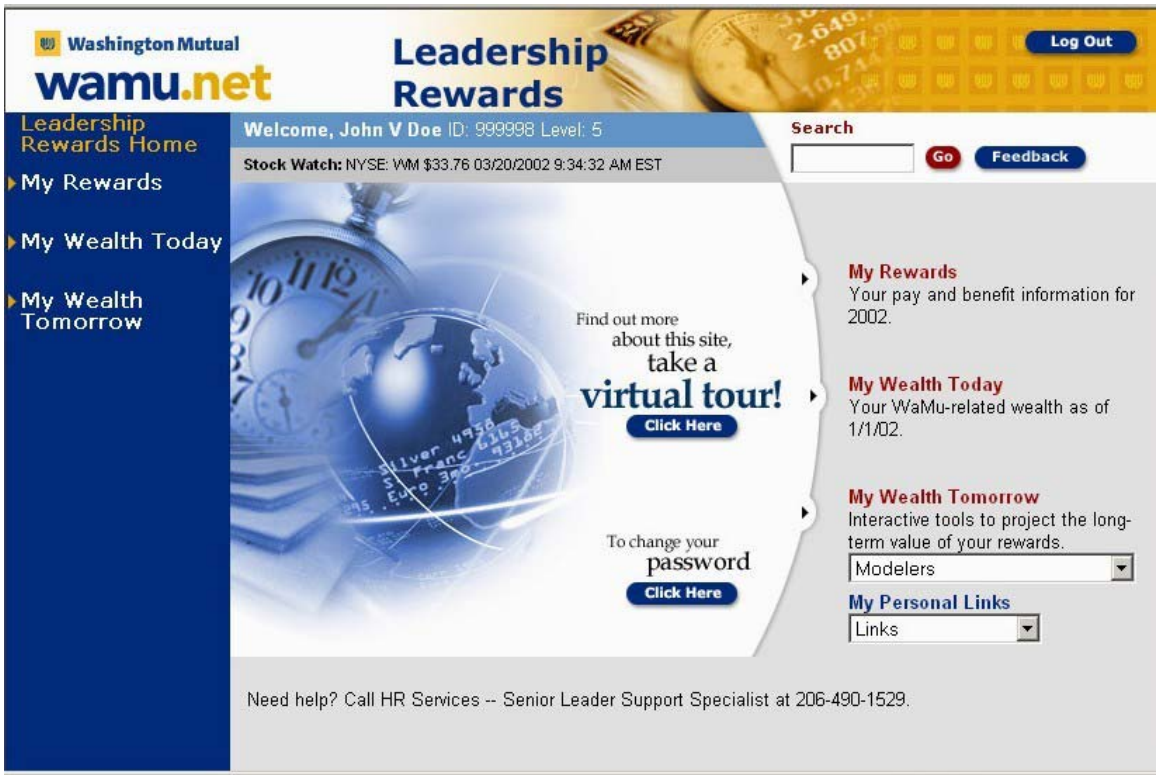
DESIGN TEAM:

Towers Perrin is one of the world's largest management and HR consulting firms. It helps organizations manage their HR strategy and service delivery, benefits and compensation design and implementation, employee and organizational communication, HR technology, and outsourced HR administration.

MEMBERS:

TOWERS PERRIN: CAROLYN HARPER, OVERALL PROJECT MANAGER; JIM CUMMINGS, PROJECT MANAGER, EXECUTIVE COMPENSATION; MONICA LINN, COMMUNICATIONS; BILL PETERS, PROJECT MANAGER, CREATIVE & TECHNICAL; ELAINE PILIPENKO, WEB DESIGNER/DEVELOPER; IVAN EPPS, PROJECT MANAGER/ PROGRAMMING; MIKE HACKETT, PROGRAMMER

Pictured: The home page on Washington Mutual's Leadership Rewards *Intranet.*



SUMMARY

The *Leadership Rewards* intranet site serves the important purposes of reminding executives of their total compensation and enabling them to project their future wealth as Washington Mutual employees. Making information available is only one part of the story. Continued awareness of this information could lead to increased retention, which is extremely cost-effective — especially at the executive level. And, a byproduct of the intranet is a large reduction in support calls to the HR department.

Usability was a significant consideration in developing and implementing the site. Two features make this site especially user-friendly: 1) Executives navigate via left-hand navigation that expands and collapses to show them where they are within the site. 2) Modeler inputs are completely customized, so that executives never need to input any personal wealth information (such as number of unexercised stock options, retirement account balances, and so on).

Understanding the busy schedule of upper management, the designers customized the intranet for each individual executive. While approximately 120 executives were originally included, the site is being expanded to include an additional 500 senior managers. The site requires a personal log-in; upon log-in, the screen displays the user's name, ID, and level. Other features include a current stock price, expandable navigation, password change, search, and a virtual tour to explain site features.

Personalized rewards statements pull personal data from a database. The data is first displayed in a pie chart, which is an easy-to-scan format. A more thorough breakdown of the user's total compensation is explained in the table to the right of the chart.

Pictured: A rewards statement displayed dynamically in a pie chart.



Users can also see a more detailed, tabular look at the information presented in the pie charts. The user can toggle back and forth by clicking the *View Table/View Chart* button.

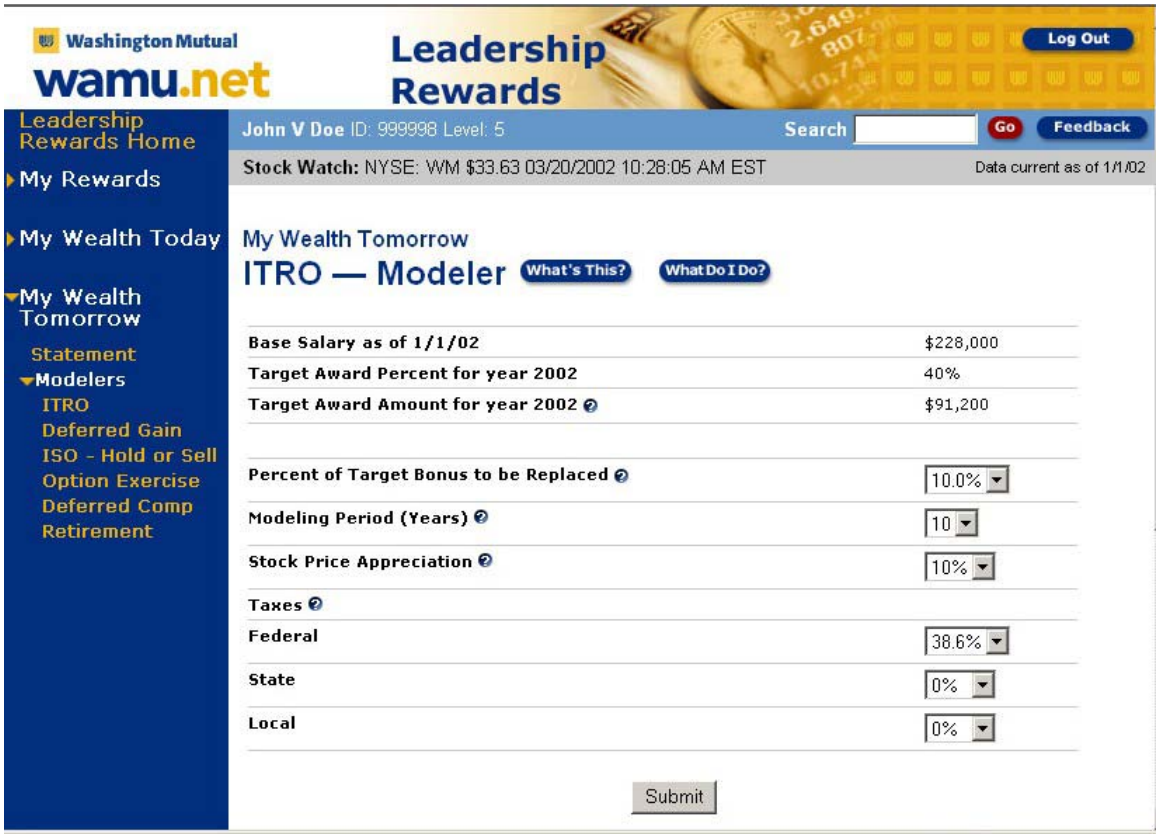
Pictured: A more detailed and tabular look to the information presented in the pie charts.



The designers did a great job of keeping pages short and uncluttered. One method they used to achieve this is to put additional explanations and information on secondary pages. Throughout the site, when the user clicks a blue question mark, a definition screen appears providing a brief explanation.

The site also provides six different modeling tools to help executives make financial decisions about their wealth. All data is pulled from a database so that users do not need to input their own information. This expedites their calculations and ensures accuracy.

Pictured: A modeling tool that helps executives make financial decisions about their wealth.



Site navigation expands to include only the section the user is in. With the left navigation, it is very easy for users to determine where they are in the site. The title of the page also reflects this, making it effortless for users to traverse the site and keep their context at all times.

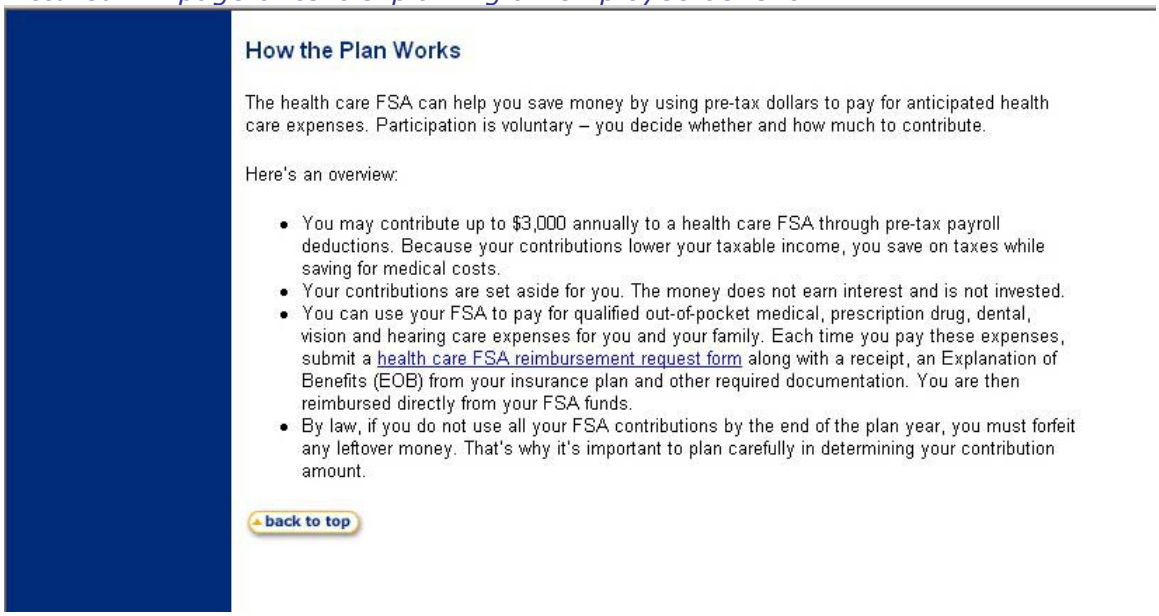
While most pages are customized for the user, some textual pages do not pull in dynamic information, but rather give basic plan information that is consistent for all users — such as flexible spending information.

Pictured: The Health and Welfare Basics *page. On this page, the user is in* My Rewards, Health & Welfare, Basics. *This is also reflected in the page title.*



When users click a link, they are brought to a page of legible, uncluttered text.

Pictured: A page of text explaining an employee benefit.



A simple search box is present on every page, making it easy for people to use this alternate to browsing. The *Log Out* button is also easy to find, in the upper-right corner. With agreeable aesthetics, a winning search, simple navigation, and unbeatable features, this intranet provides executives with a valuable experience that lets them save precious time.

Scoring (3 = best)						
Simple look	Simple navigation	Consistent navigation and design	Visible search	Simple search	Limited (well-presented) text on pages	Home page
2.3	3	3	3	3	2.8	2.6

DESCRIPTION OF THE INTRANET

The *Leadership Rewards* site is a stand-alone intranet originally designed to give 150 senior Washington Mutual executives a complete picture of their income from the company, including salary and other benefits and incentives.

BASIC FEATURES

The company wanted to give executives a complete picture of all company-provided wealth. The intranet accomplishes these goals through three main sections:

- *My Rewards:* Summarizes annual total compensation. Additional screens provide historical pay information and brief descriptions of all compensation programs, including online access to enrollment forms, and so on.
- *My Wealth Today:* Aggregates all current values/balances of company-provided wealth. Additional screens provide details about the sources of this wealth, such as current value of all unexercised stock options and recent retirement account activity.
- *My Wealth Tomorrow:* Allows executives to project their future wealth, both in aggregate and by individual compensation program.

URL AND ACCESS

Users can type in the URL directly — which they have to do from home — or they can click a special "button" on their intranet site to access *Leadership Rewards.* The button only shows up on their intranet, for them. They then enter a specific personal identifier and a password, which they can change whenever they want. These standards are consistent with other Web-based sites they have access to.

BACKGROUND

Towers Perrin has worked with Washington Mutual on various projects over a period of ten years or so, and knows the company very well. In spring 2001, Washington Mutual asked Towers Perrin to create the *Leadership Rewards* site and have it working by the end of the year.

GOALS AND CONSTRAINTS

The intranet's main goal is to reinforce loyalty and aid retention among Washington Mutual's senior employees by giving them a comprehensive, easy-to-access picture of all the different income streams they get from the company, and how they add

up, including their future wealth projections if they stay with the company. A secondary goal is executive self-service, taking some of the pressure off Washington Mutual's HR department, which would otherwise have to deal with queries about remuneration and rewards.

The bank wanted to have the intranet operational as soon as possible, creating a time constraint. In terms of design, the *Leadership Rewards* site had to echo the general look and feel of Washington Mutual's general intranet site.

DESIGN PROCESS AND USABILITY ACTIVITIES

Building the site involved cooperation between four groups at Towers Perrin: executive compensation experts, programmers, graphic designers/usability specialists, and the communications group, which looked at how to present the intranet to the users.

The team started on the project in late April 2001. Following an initial meeting with the project sponsor — the bank's executive vice president of HR — Towers Perrin built an initial information architecture for the site, based on the briefing it had been given, its knowledge of the company, and its experience of working on other executive compensation projects. The bank agreed on this information architecture with only minor changes.

The next phase, analyzing the data requirements, took most of the summer and involved finding out what data sources were available within the company and how to best pull data from all these sources into a back-end database.

Once it was established what data was available, the team began work on the designs for presenting that data to Washington Mutual's users. The designers first drew up a plan for page behavior and a series of style sheets. They then drew up some alternative visual designs and presented them to the project sponsor in paper form. Once a design was accepted, the team applied it to other site areas and ran internal usability tests. Toward the project's end, just before the intranet went live in early December, Washington Mutual carried out more usability testing.

Team members did not carry out initial user requirements analysis before producing initial designs, because they already had in-depth knowledge of the company from their longstanding working relationship. The team also got input along the way from its main company contact, the head of HR. Once the designs were firmed up, a group of Towers Perrin staff combed through them to weed out obvious usability problems. One result was that the modelers and information about them were all grouped together under the *My Wealth Tomorrow*. In November, Washington Mutual's in-house usability department tested the screens on some of the bank's senior staff. "They had very few changes to make, but we had spent a lot of time doing testing ourselves and making sure the design elements made sense," says Carolyn Harper, the overall project manager.

The *Leadership Rewards* site design was dictated partly by the requirement that it reflect the main intranet's design. Both sites feature the bank's logo in the top left-hand corner, use its corporate colors (blue and gold), and feature a left-hand navigation bar rather than horizontal navigation across the top. The Verdana typeface used in the left-hand navigation is also a company standard.

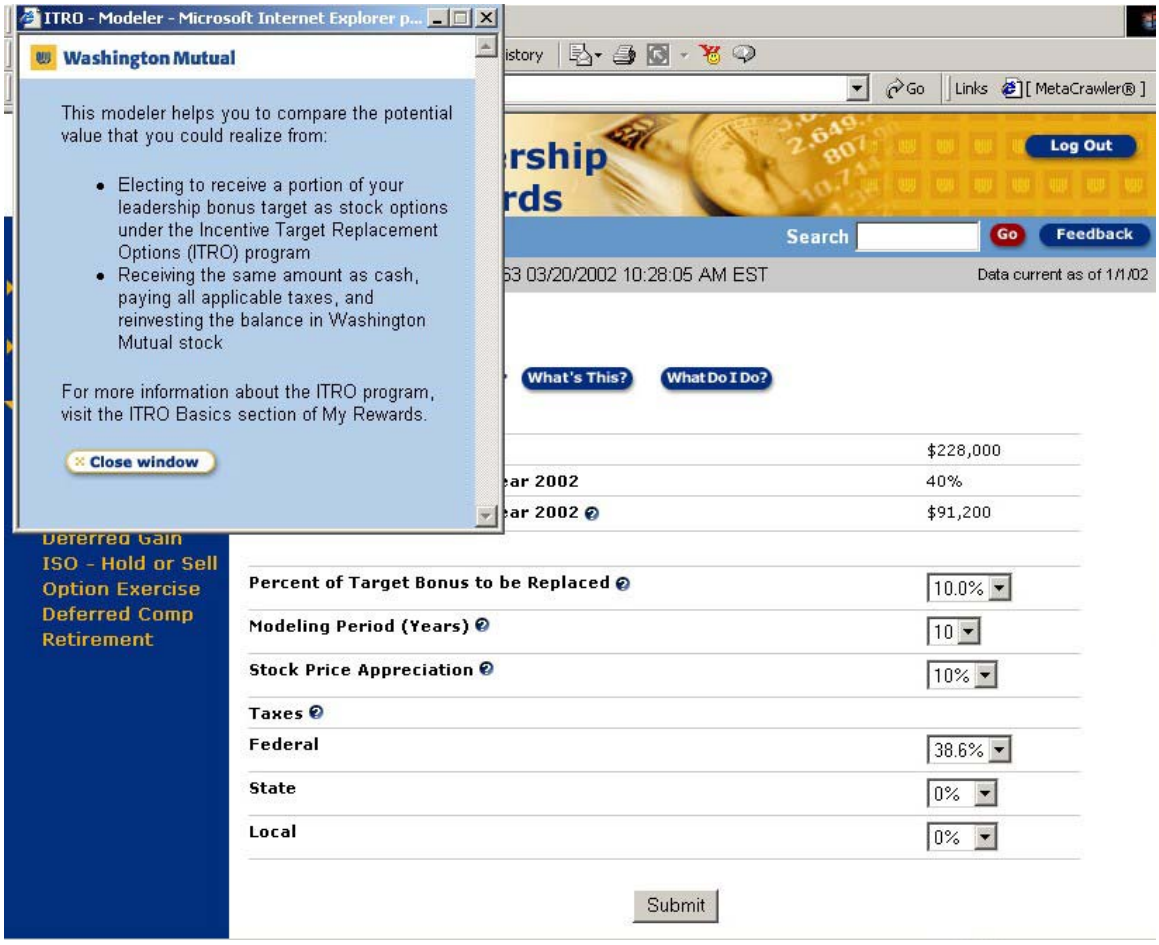
Washington Mutual had requested some kind of imagery across the top of the page and on the front page. Towers Perrin picked the globe, watch, and compass to project the idea of Washington Mutual as a global company operating across different time zones. The curved shape on the home page echoes the roundness of the imagery.

Towers Perrin was also able to draw on its experience of developing intranets for other clients, incorporating tried and tested features such as a feedback button on every page and the *Virtual Tour*, which gives users a quick site overview.

The designers modified the main site's navigation by introducing a collapsing menu structure to keep the left-hand column a manageable length and reduce scrolling. The white links are section headings, which expand to reveal yellow clickable or expandable links.

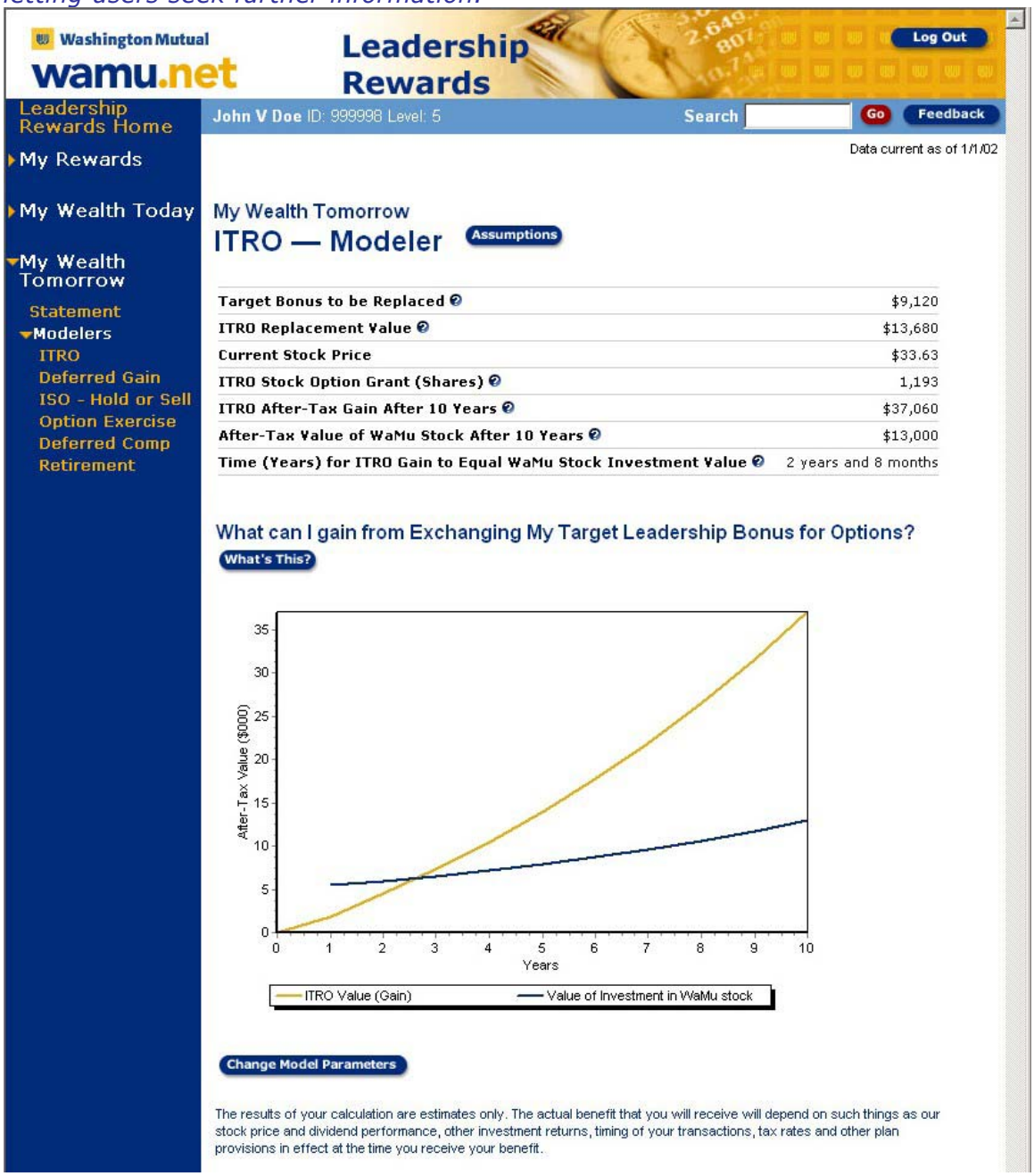
Color is used throughout the site to reinforce basic functions. The designers chose a pale blue background for pop-ups that give modeler information and light green backgrounds for those that give definitions.

Pictured: A pop-up window that appears after the user clicks the What's This *button.*



One of the project challenges was to present large volumes of information and modeling tools in an easy to use way. The team's design solution was to keep the basic pages simple and let users seek further information by clicking on query buttons (presented in white text on a blue background) that lead to a form or pop-up definition. The site contains no fewer than 150 explanatory pop-ups. "We try to make it as unobtrusive as possible while helping the user," explains Bill Peters, project manager for creative & technical.

Pictured: A page with query buttons that lead to a form or pop-up definition. This choice let designers keep the basic pages simple, while letting users seek further information.



TIMELINE

- April 2001: Towers Perrin starts work on the *Leadership Rewards* site's information architecture.
- May–September 2001: Analysis of data requirements; architecture refinement.
- October–November: Design work.
- Late November: Usability testing.
- Early December: Intranet goes live.

RESULTS

No metrics have been collected for the site, but response from the 150 initial executive users has been very positive, and the bank now plans to roll the system out to its top 2,000 staff.

LESSONS LEARNED

Insights from Carolyn Harper:

Strong project management is critical. "Building, organizing, and managing a large intranet site is a fairly complex task."

Make sure you have a sound technology infrastructure. "The intranet needs to be accessed on a platform that's fast enough so that you don't frustrate the users."

Pulling it all together takes time. "Don't underestimate the time it takes to coordinate the data from the various sources, and give data suppliers a predefined format to populate."

World Bank Group and Satyam Computer Services

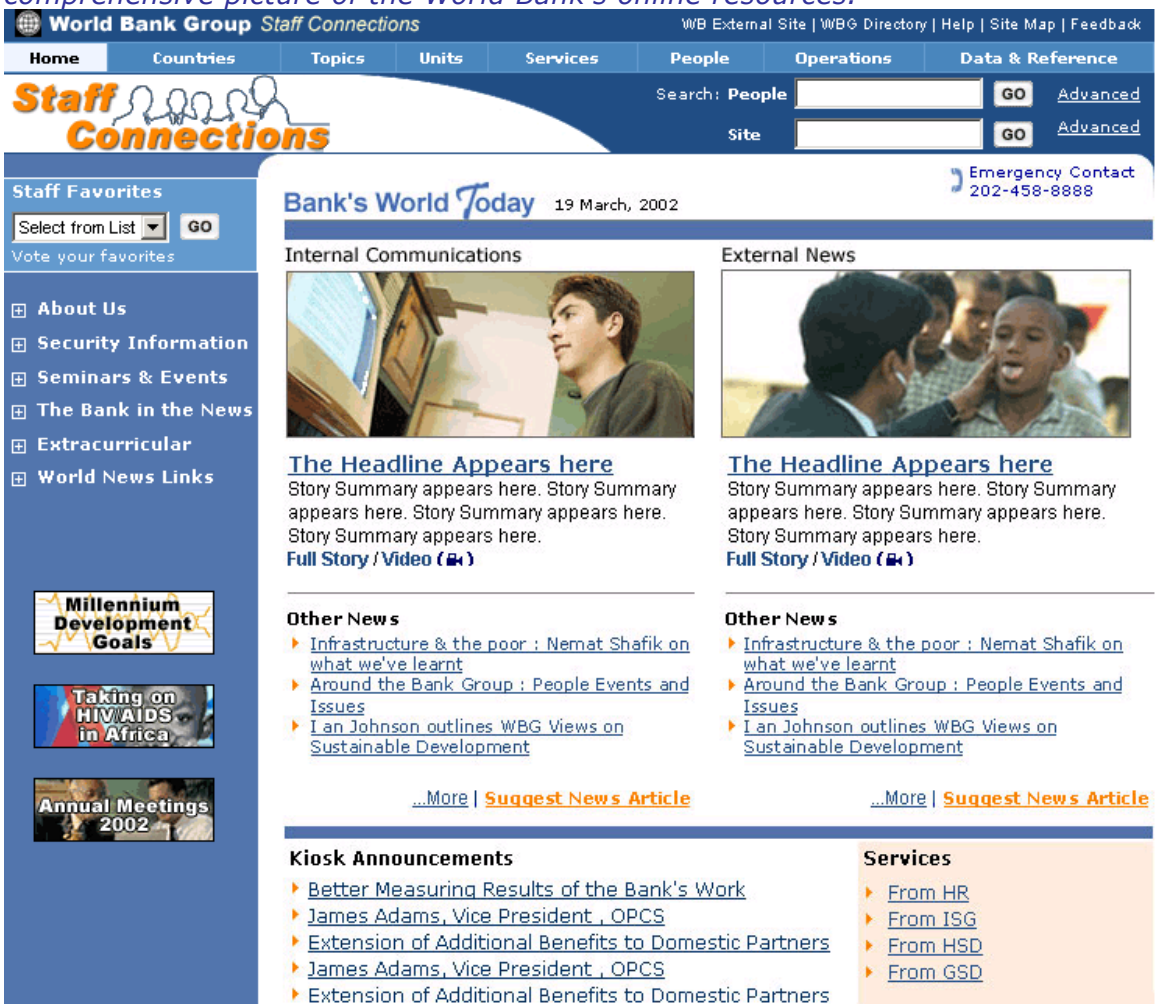
USING THE INTRANET:
The World Bank Group is one of the world's largest sources of financial aid to developing countries. Headquartered in Washington D.C., the Bank has employees working in country offices throughout the world.

DESIGN TEAM:
World Bank's Internet Working Group and Usability Team; and Satyam Computer Services, an Indian IT services company, which is implementing the CMS and designing the input and display templates.

MEMBERS:

WORLD BANK: MARIA DOLORES ARRIBAS BANOS, TEAM LEADER AND INFORMATION MANAGEMENT OFFICER; ISABELLA NUNEZ DE MAGALHAES CUNHA, CONSULTANT IN CHARGE OF INTRANET MAINTENANCE AND SUPPORT; DAVID CLINGMAN, VALERIE STEWARD, AND MICHAEL BETTERRIDGE, COMMUNICATIONS AND CHANGE MANAGEMENT; ANGELA FAN, METADATA MANAGEMENT; VIRGINIA FOLEY, REGIONS/COUNTRIES MIGRATION; CHATCHARES CHITVARANUND, TECHNICAL SUPPORT; BAKKIYA MURUGABASKAR, MANAGES THE TECHNICAL STAFF; ALOK JAIN, MAIN DESIGNER WHO WORKS WITH A DESIGN TEAM IN INDIA

Pictured: The intranet home page is uncluttered, but still provides a comprehensive picture of the World Bank's online resources.



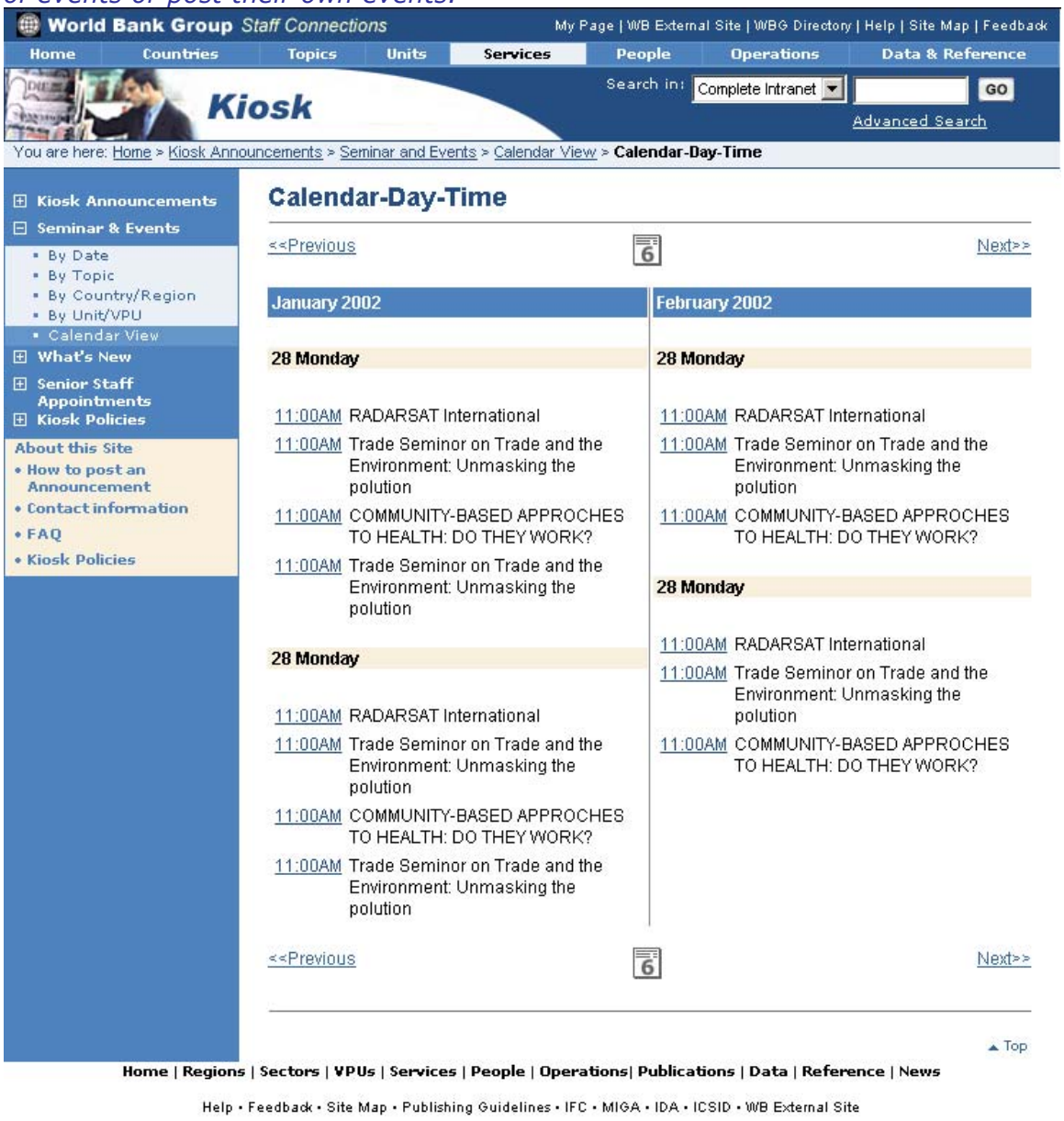
SUMMARY

The World Bank has more than 10,000 staff worldwide, and is headquartered in Washington D.C. All employees are not only allowed to post content on the intranet, but are encouraged to do so. Many corporate communications and IT departments, and intranet designers have said they cannot let users contribute to the intranet because of company rules governing content. But in this case, the intranet succeeds because of the commitment to the intranet by many different departments and individuals. The necessary reviews and approvals for submitted content do not just fall on the Web team's shoulders. Instead, submitted content is routed to the right people, and those people and departments review and actually post the approved information. This helps the organization balance controlling the intranet's submissions and overall content, as well as how it is displayed.

The intranet home page provides a comprehensive big picture of the Bank's online resources, and consolidates corporate communications, both internal and external, while maintaining an uncluttered look. The internal communications appear in the middle section of the page, and external communications (*Bank in the News*: press releases and press reviews) appear in the left-hand navigation. Employees can suggest articles for each section; the Internal Communications team and Media Relations team facilitate and prioritize the content. The advertising icons toward the bottom of the left-hand column highlight items, such as annual meetings, that will be posted for more than a day.

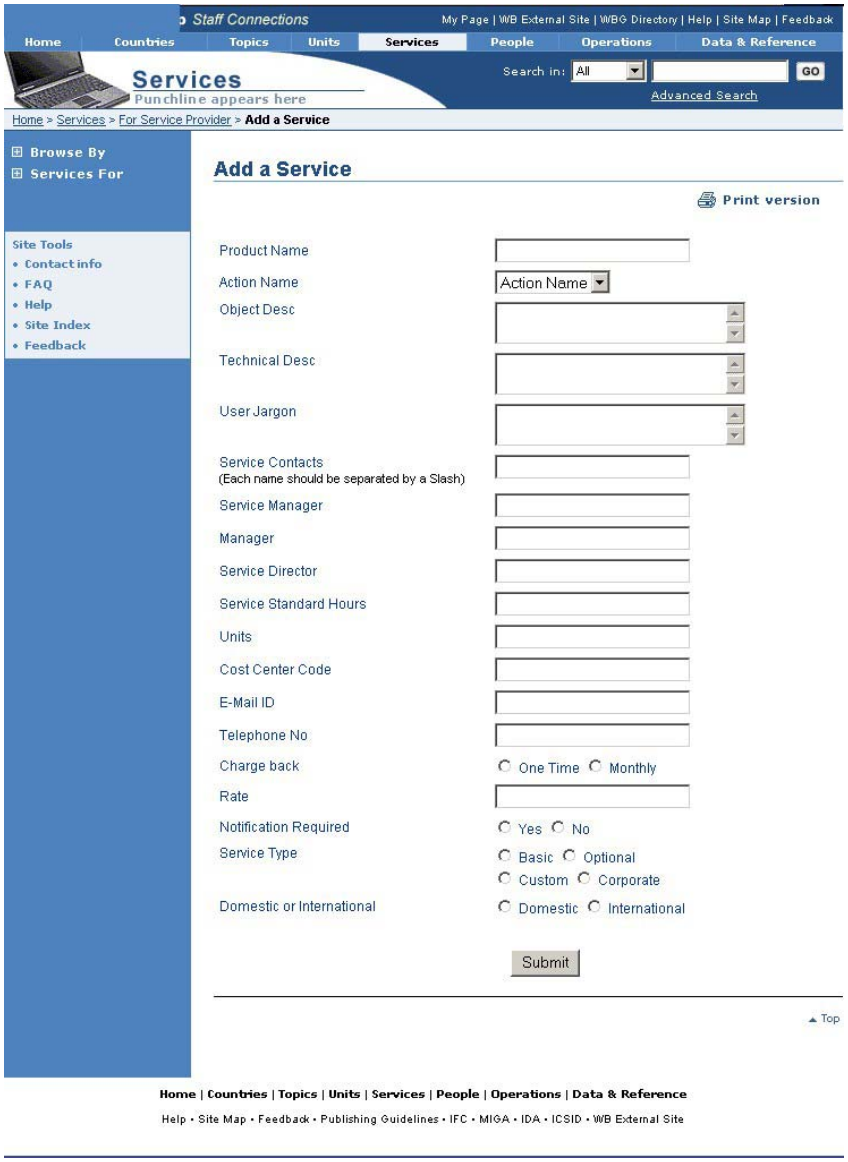
The intranet is the perfect place to advertise internal events and seminars. What better way to ensure that all groups are included than to let people post their own events? On the World Bank intranet, all Bank staff can publish their seminars and events using the *Kiosk* tool. A Kiosk administrator monitors the entries to make sure that the audience for the event is big enough that it makes sense to publish it for all employees.

Pictured: The events calendar, Kiosk, where users can read the calendar of events or post their own events.



The services portal lets users browse by service category, by service provider, and by headquarter services versus country office services. It integrates decentralized service catalogs with the yellow pages, and lets units that do not have a service catalog submit an entry into the yellow pages directly from the services portal. The yellow pages administrator reviews and approves submissions for the yellow pages catalog.

Pictured: The services portal lets users browse by service category, by service provider, and by headquarter services versus country office services.



The designers chose templates with a standard and simple look and feel, light pages that load quickly, and a consistent user experience. There is a prominent place on the header for local branding, such as pictures and logos, while the rest of the header components remain constant across the site. Most of the categories on the left-hand navigation are optional, and there is room for free categories that are specific to a particular group. Much of the content is data-driven, but in most cases owners have the option to reject or accept content coming from an institutional source.

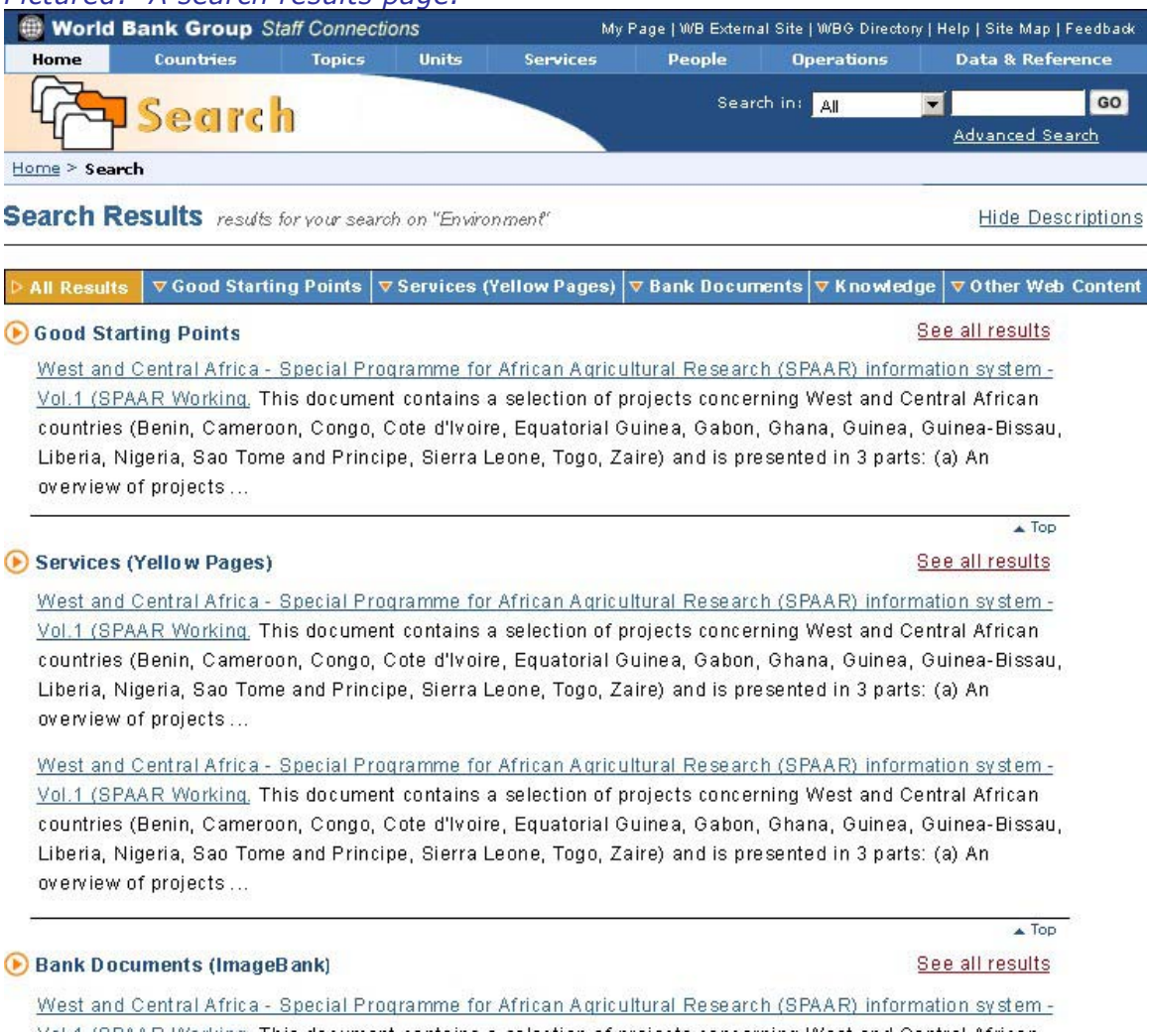
Pictured: A country page, demonstrating the templates' standard and simple look and feel.



For performance reasons, the designers chose to separate the people search from the site search. Because the employee directory search is the intranet's killer app at many large organizations, it's imperative that this feature is visible, simple, and most of all fast. The site search combines a metadata search for frequently used repositories with a crawl search that uses Google's intranet search appliance for uncataloged content.

The search results page repeats the search query, which is always a good idea. The page is easy to scan, the title links to the full document, and the short descriptions further describe the documents. The *Hide Descriptions* link is a nice feature, which, obviously, hides the descriptions and lets the user see more results at once.

Pictured: A search results page.



The breadcrumbs, standard navigation, and consistent page layout make this intranet's behavior predictable, but not boring. The bold colors and exciting pictures, plus pertinent and ever-changing content make this intranet a place people will want to return to when they conduct their everyday tasks.

Scoring (3 = best)						
Simple look	Simple navigation	Consistent navigation and design	Visible search	Simple search	Limited (well-presented) text on pages	Home page
2.4	2.8	2.5	3	3	2.7	2.8

DESCRIPTION OF THE INTRANET

Though the World Bank is a multinational organization, the intranet is mainly presented in English. It does, however, include documents in different languages, and the search facilities make it possible to search for content in a specific language. Where content is available in a choice of languages, the link to the other language versions appear at the top of the page, letting users toggle back and forth through the language versions.

BASIC FEATURES

- News subscriptions, staff news, corporate news, and newsletters
- HR services, such as pension benefits, salary increases, resume updating, and job applications
- General staff services, such as visitor passes, conference room booking, coffee services, and cafeterias menus
- Health services, such as health room schedules, info on vaccinations for traveling staff, and gym schedules
- IT services, such as ordering a Lotus Notes account and requesting global/remote access
- Operations services, such as travel requests and travel expense processing
- Various documents and reports, publications, and information on projects and loans.
- Staff directory
- E-discussions
- Events calendar
- Announcements to employees, extracurricular announcements, and a bulletin board for buying and selling items
- Extranet applications with clients

The intranet also includes a knowledge management system. Although content creation is completely decentralized, with the implementation of the CMS, the company has standardized the tool used to update the page and design templates.

URL AND ACCESS

The intranet is the default page when Bank employees open their Internet browser, unless they manually change it. On the standard desktop, the browser always opens at start up, so the intranet home page is the first thing employees see when they start their computer. An exception to this is country offices staff, who sometimes have slower connections.

BACKGROUND

The Bank has had an intranet since about 1994, but started out by letting about 400 internal content providers around the world contribute on an ad hoc basis, using their own tools and design ideas. "Everyone could do what they wanted: create pages in HTML, Lotus Notes, and so on. Same for design — we had a few standard templates, but that was pretty much it," says Maria Dolores Arribas-Banos, team leader and information management officer.

As the intranet grew in size and scope, it became increasingly cumbersome and hard to maintain, and content became increasingly hard to find. In September 2001, the Bank embarked on a three-year intranet redevelopment project, which would also harmonize the internal and external sites. Although the technology department

owns the project, a steering group of representatives from various Bank areas approved the budget.

GOALS AND CONSTRAINTS

There were two main goals for the redevelopment project. First, the Bank wanted to provide a common technical infrastructure for the intranet and public website to reduce development speed, create an easily maintainable structure, and integrate navigation and search so that information is easier to find. Second, it wanted to transform the intranet from a basic information source into a full-blown corporate portal that offered personalization features and provided a platform for Web-based applications.

In pursuit of its first goal, the Bank is now migrating existing intranet and Internet content into a central CMS, with a dynamic publishing capability. As it introduced a common technical platform and common look and feel, the Internet Working Group (IWG) wanted to ensure both that content providers retained control over their content and that departments and regional groups retained some individual identity. "The templates we had before were very rigid. We wanted to provide some flexibility and local branding," Arribas-Banos says.

So, content creation will still be decentralized, but the IWG will centralize and manage template management and overall design. Also, some content owners have the same content on the intranet and external Web; the CMS should save them time by making it easier to repurpose content.

One of the technical problems the team had to resolve was improving the search facilities. "Before, you pretty much had to go to each individual repository to find something," explains Arribas-Banos. Now, the Google search engine lets users search the whole intranet or narrow the search to a particular section.

All 10,000-plus Bank employees have intranet access, some from country offices with less than optimal Internet connectivity. The intranet also has to serve mobile employees as they travel throughout the world, and therefore has to work well even over low-speed and mobile connections. This means, for example, a strict limit on use of graphics. But, set against that constraint, the organization's standard desktop gives the design team the advantage of only having to develop for one browser: Internet Explorer 5.0.

DESIGN PROCESS AND USABILITY ACTIVITIES

The team divided the intranet redevelopment process into four stages: requirements gathering, development, usability testing, and content migration. The intranet is not yet completed, and the team continues to carry out the final three stages on various parts of the site.

Requirements gathering lasted about six months, from July to December 2001, and involved about 400 different content providers and users throughout the organization. Satyam, the Bank's development partner, created a detailed questionnaire covering issues such as the goals, target audience, content type, and workflow requirements for each section. The team sent this out to the main regional coordinators around the world, who were asked to review it with the different country webmasters.

One finding from this exercise was that questionnaires had to be worded quite carefully to get the desired result. "We found that the responses to the questionnaire were a bit too general, and in many cases we had to go back and get more specific information," Arribas-Banos says. Once the exercise was completed, the results were consolidated into an overall requirements document.

In addition to sending out questionnaires, team members met with representatives of various departments at the Bank's headquarters to discuss their requirements. To create a more user-driven information architecture, they also asked Satyam consultants to carry out card sorting exercises with user groups for both the overall site and individual subsites to determine where users would expect to find certain content.

The team learned some lessons while using card sorting to elicit requirements. "Card sorting gives you some insight about how content should be organized, but you have to be careful in how you use the results, because it may not be the case that people really want it that way," says Arribas-Banos. "We found the responses would vary widely depending on the person's background; depending on who you asked, you would get a completely different organization, and when you played the result of the organization they had chosen back to them, they didn't always like it."

The team addressed this issue by creating a flexible structure that lets users navigate to the same content in different ways. Users can find data on Angola, for example, by going to the data page and browsing by country, or by going to the country page and browsing by data.

Finally, team members conducted a content inventory to determine what content was currently on the site, whether any of it should be deleted, and if any key content was missing. They also looked at metadata issues, such as which content required cataloging (for example, press releases), and what information they needed to capture.

Using all this information, the team created an information framework that included the overall site and navigation structure; basic template definitions; what approval processes were needed; and any special requirements, such as specific workflow processes.

They also specified a basic color palette and a page design framework, which they called the *C-clamp,* consisting of a header across the top, left-hand navigation, and a footer. In addition, local branding goes at the top left in the main menu bar, search is always in the top right corner, and help and feedback buttons are mandatory on all pages.

Once the information structure and workflow was established, the team started work on building each section's input and display templates, using either existing templates or producing customized templates to meet departmental requirements. "Some departments, like General Services, need very specific templates, so it was very much demand-driven," Arribas-Banos explains.

Before the designers started working on the site templates, they consulted with content owners to come up with a preliminary content structure. Once the initial design was set and the standard components were developed, they built a basic

storyboard using Lotus Notes to show where the page elements should go, and defined the page behavior.

Pictured: Designers built a basic storyboard using Lotus Notes to show where the page elements should go, and defined the page behavior.



Being able to specify the storyboards and page behavior in electronic documents is particularly important, given that the Bank is working with an offshore design team. Face to face meetings are almost impossible, and they carry out most communications via email, phone, or video conferences.

Early on in the project, team members developed a migration plan setting out where existing content should go — basically, they had to decide whether it should migrate to the CMS or a document management system, or just be deleted. The final migration stage is now underway and the aim is to complete the bulk of it by the end of 2002. The data migration is proceeding in parallel with the portal implementation, which includes the staff portal, projects portal, managers portal, and so on, plus extranet applications such as the donors portal. This stage also includes training for content providers, editing, and testing.

In January 2002, the team launched a pilot site, including news and events on both the intranet and the external Web. By introducing the new system to users in small steps, the team hoped to avoid the culture shock associated with a "big bang" approach. "So we decided to go with a pilot and have the owners of those sections bring the business on board, and this approach worked well," Arribas-Banos explains.

Rather than appearing as a series of staged releases, the intranet design evolved gradually, with some pages going through up to 200 small iterations. The home page is one example of a design that went through many design changes. The Bank's old home page design had about 50 links on the first screen, visible even before scrolling down. The page contained too much information and redundancy within each category. "It was just too busy," Arribas-Banos explains. "People couldn't spot changes in content." Furthermore, because all the sections were automatically populated from the source material, there was no way of highlighting priority items, and, since new material replaced old items, there was no way to highlight items for longer than a day (or in some sections, a few hours). Also, users found the black top menu bar hard to read, and tended to miss menu items, including the search feature. They were also confused by the cascading menus, which were activated by mouse over.

Pictured: The previous home page design, which was too busy.



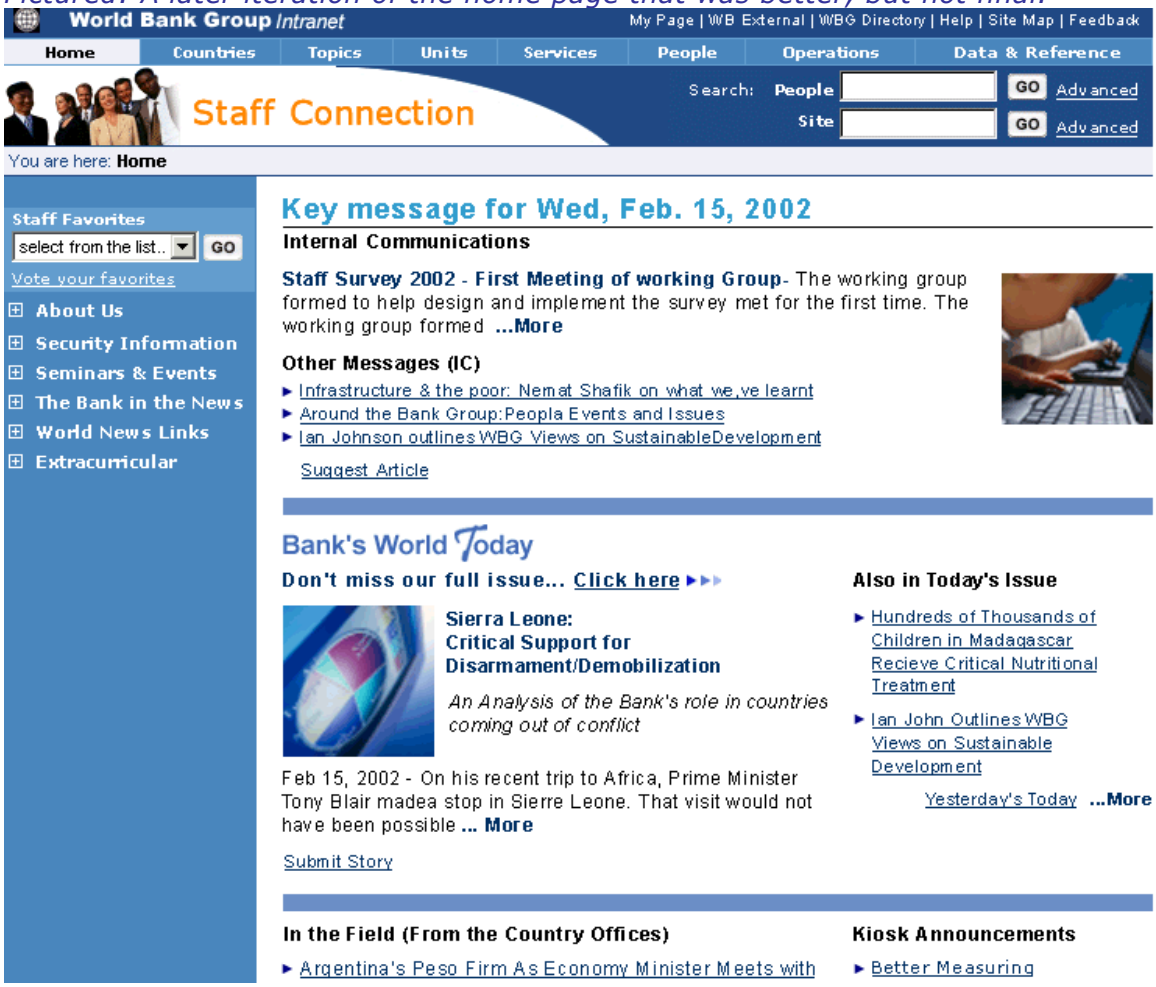
In October 2001, Satyam presented its first attempt at a redesign. However, several of the problems identified on the previous intranet remained, so the design was rejected, and it didn't get as far as the Web and user communities. "It wasn't fixing any of the problems we had," Arribas-Banos says. The page was still cluttered, with almost the same amount of information as before. And, while the search option was more prominent, it didn't solve another existing problem: that most users didn't think to change the default search option — people search — resulting in frustration and complaints.

Pictured: The first attempt at a home page redesign. Several of the previous intranet's problems remained, so the design was rejected.



Several further iterations resulted in the next version. "We liked this much better and felt it was much clearer," Arribas-Banos says. The search problem had been fixed by having two separate boxes for people and site search, and the site had a more professional-looking design, most of which has been retained in the current version. In addition, the new version included a name for the intranet, *Staff Connections,* and a new section, *Kiosk Announcements,* where staff can more easily submit their own announcements, enhancing the sense of community. Because the Bank wanted more regional input on the home page, the team introduced an *In The Field* section to carry daily regional news. However, this turned out to be impractical, and had to be dropped.

Pictured: A later iteration of the home page that was better, but not final.



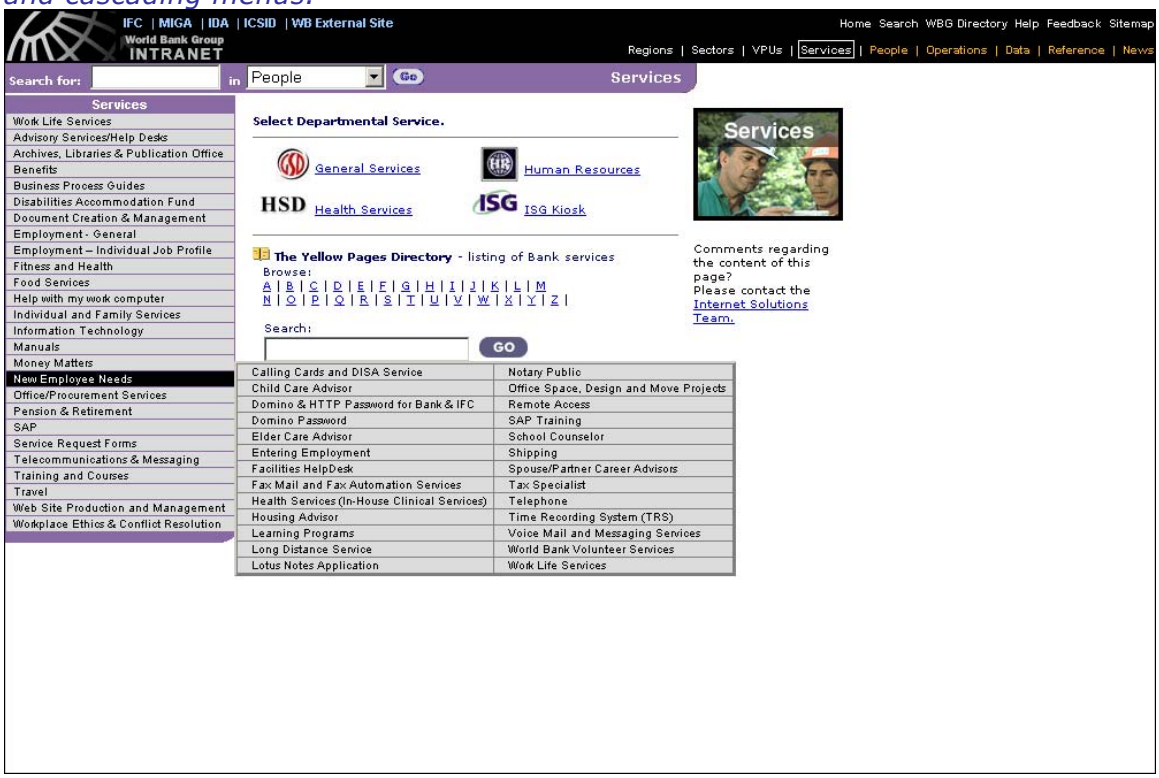
Even with the improvements to the home page, a number of user criticisms remained. These included unclear priorities for the daily news; no way to highlight items for longer than a day; and poor visibility for *HR content,* one of the site's most popular areas. The users also disliked the people image used in the top left corner with the *Staff Connection* logo. Users felt that because the Bank has a multinational, multicultural staff, the image should reflect this diversity.

In the latest home page design, the controversial photographic image has been replaced with a neutral silhouette, and the logo was redesigned. To solve the problem of being able to highlight items for a longer period, the left-hand menu column can now include graphic buttons (such as *Millennium Development Goals*) linking to special items of longer-term interest. But the page continues to evolve in a process of ongoing development.

The latest design also addresses a longstanding issue by having content from the Bank's internal communications and external news departments appearing under the same *Bank's World Today* banner. User feedback showed that users did not see the difference between the two sections, which both essentially cover news about the Bank, and found them confusing. The solution is a compromise.

The drive toward less clutter and greater simplicity is reflected in changes to other site areas. The old services page had a long list of services categories and used cascading menus. Since there was no formal process for content publishing, services were often cataloged by the service providers — again by the central yellow pages administrator, with help from the services site manager.

Pictured: The old services page, with its long list of services categories and cascading menus.



In the new service portal, the number of service categories was reduced to nine, but users have more ways of browsing them: by service category, service provider, and headquarter services. Decentralized service catalogs will be integrated with the central yellow pages. Units without a service catalog can already submit yellow page entries directly from the services portal.

One of the problems the design team faced was providing central control over the intranet's structure and look and feel, while also providing a measure of local autonomy. Setting the rules for the information framework, template definitions, and page behavior upfront was vitally important. Before individual departments start to look at page design proposals, they have already agreed on the basic ground rules. Their own designers can be involved in the process, but must work with design guidelines, such as a standard color palette. In developing the *Bank's World Today* section, for example, this meant much fewer interactions were needed between the intranet team and the department, because the templates already included the intranet's standard components.

In an organization with more than 10,000 employees, getting representative user feedback in manageable volumes is a major challenge. "Of course you want to hear everyone's feedback, but we have a lot of staff and everyone has an opinion and a

preference," Arribas-Banos says. "So we set a time frame for listening, then we had to go ahead and make a decision."

Principle feedback comes from the IWG Community, which any Bank employee with any interest in the Web can join. The IWG Community distribution list currently includes more than 600 people.

New proposals for the intranet are circulated to the IWG Community with a request for comments. The intranet team also puts a link to any new pages on the intranet home page, partly to get feedback and partly to alert users that a change is imminent. "We might put up three mockups and ask them questions; we keep them up there for maybe fifteen days or longer," Arribas-Banos explains.

The intranet group can call on the Bank's in-house usability team, which carries out both heuristic evaluation and user testing for page designs as they evolve. "We do a heuristic evaluation ourselves and then, once we're comfortable with the design, we send it to the in-house usability team," Arribas-Banos explains. "They will find the most obvious usability issues and fix them; most of the problems you can fix right away but others need more changes. Once the final templates are ready, we send those to the team and they do an evaluation with real users."

Team members initially focused the user testing on the input templates used by content providers; they also extensively tested display templates. They carried out tests with groups of three to five users, who were given a list of tasks to complete and a questionnaire to fill out. One compromise the group had to make was on its samples of test users. "It's a challenge to get a representative group, because people are busy, so you tend to end up working with the people who happen to be wherever you are," Arribas-Banos says.

TIMELINE

- November 2000: World Bank starts to look for new CMS; sends out questionnaire to gather requirements from all content providers.
- September 2001: Work starts on the intranet metadata model.
- November 2001: Satyam starts work on page designs. Pages developed on an iterative basis.

RESULTS

Before the project started, the World Bank hired a contractor to run out a baseline assessment of the previous intranet, identifying indicators such as number of broken links, time spent configuring subsites, how many consultants were hired to do site design, and so on. When the current system is completed, the same indicators will be measured to give quantitative results.

The intranet team also conducted a user survey when the old intranet launched and the team plans to do the same survey once all content has been migrated into the new version. The team also analyzes statistics of site usage, conducts surveys of the organizational webmasters, and logs comments sent in by users via the feedback button.

The change has not been painless, and initially many staff found it hard to agree to a standard look and feel. "All the units had technical people who would need to work from centralized templates," says Arribas-Banos. "Change management was the most difficult part of the process."

Change management measures have included inviting outside speakers to offer presentations on the benefits of a consistent user experience across the intranet, the benefits of using standard templates, and how sales increase as a result of introducing corporate standards. "When someone from outside comes and tells you, you pay more attention, particularly when they're talking about very specific bottom-line improvements," Arribas-Banos says.

Though the site is still at the pilot stage, there are already informal indications that it is achieving its goals, with an increased number of users reporting confidence in the intranet. The improved search function has proved highly popular. "Search was a huge win," says Arribas-Banos. "People actually called us up to say how well it was working, which was a pleasant surprise."

The Bank also expects to make savings by using the CMS to more easily repurpose content between the intranet site and the public Web site.

LESSONS LEARNED

Insights from Maria Dolores Arribas-Banos:

Change management is more challenging than any technical issue. "People don't like change. If you encourage them to participate by sending feedback, they're more receptive to the new system."

Anticipate requirement changes. "If you need to deal with changing requirements and you're working with a contractor, make sure you set up the contract to allow for change."

Involve content providers early on. "Content providers need to know the capabilities of the new system and its potential before they can submit realistic requirements. You have to go to them with a straw man and let them break it apart."

Go for process rather than perfection. "If you're aiming for perfection the first time, you'll never get anything done. Aim for continuous improvement instead."

Get buy-in from decision makers. "Sponsorship and top management support are vital."

Plan for staff adjustments. "Don't forget transitional activities like training, ongoing support, and deploying staff whose skills are no longer used in the new system."

Wachovia Corporation

Using the Intranet:

First Union (founded in 1908 in Charlotte, N.C.) and Wachovia (founded in 1879 in Winston, N.C.) merged on Sept. 1, 2001 to create Wachovia Corporation. It is now the fifth largest bank holding company in the US based on assets of $364 billion as of June 30, 2003, and provides financial services to over nine million households and 900,000 businesses. The corporation has more than 80,000 employees serving customers throughout the East Coast and the nation.

Design Team:

In-house

Members:

Dale Bass, VP, intranet experience team lead; Jim Bates, AVP, graphic designer; Kathleen Cannon, officer, information architect; Robert Stribley, information architect.

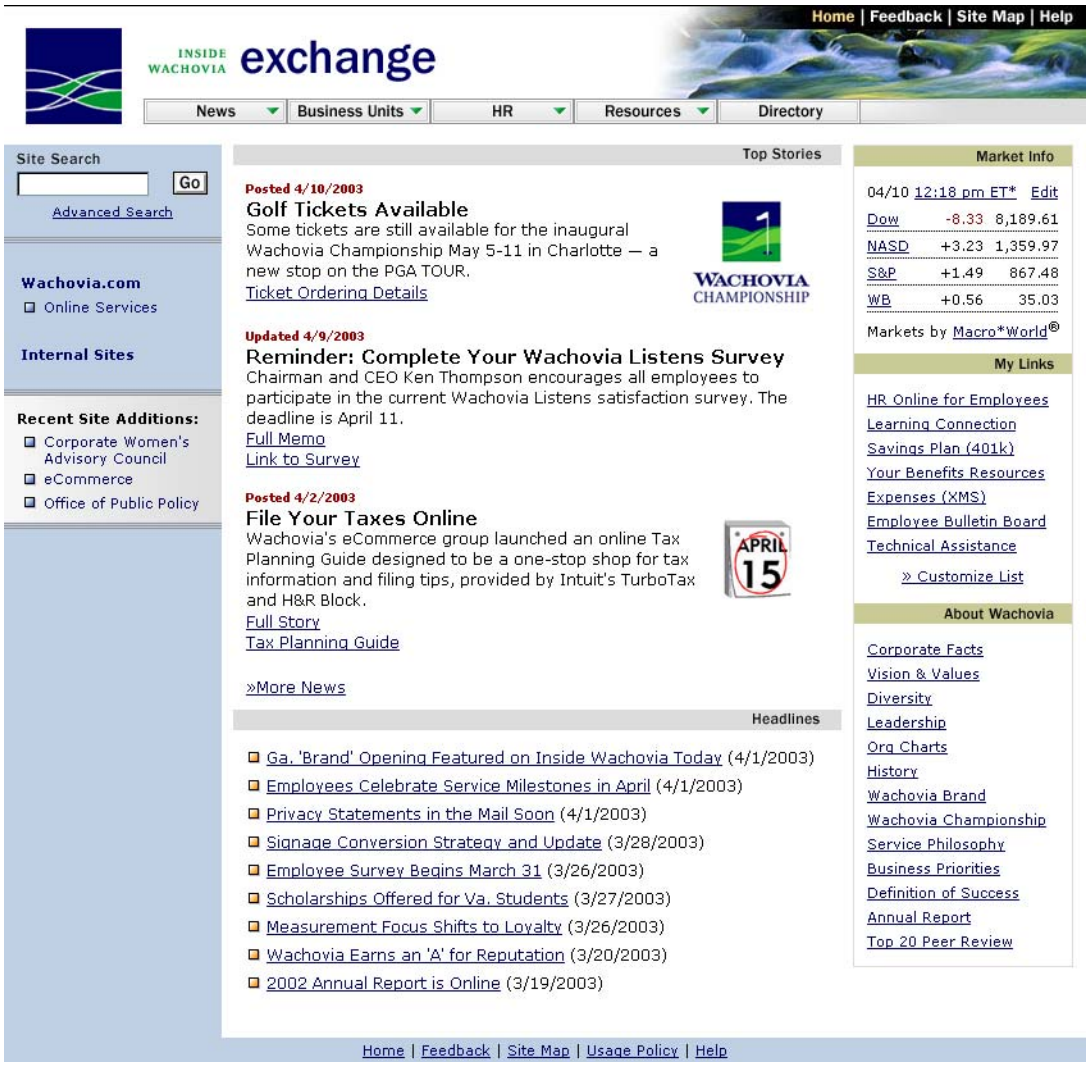
SUMMARY

The Wachovia enterprise intranet site accurately represents a busy company: It buzzes with activity, but is not too cluttered or in any way annoying — a difficult balance to achieve.

The company named the intranet *Inside Wachovia Exchange* to coincide with its established internal branding. "Inside Wachovia" is the common descriptor for all avenues of corporate communication. For instance, *Inside Wachovia Today* is the employee television show, and *Inside Wachovia Times* is the corporate newspaper. Using such a well-known naming convention for the intranet helps reinforce the company's internal community and helps the intranet fit into the overall structure.

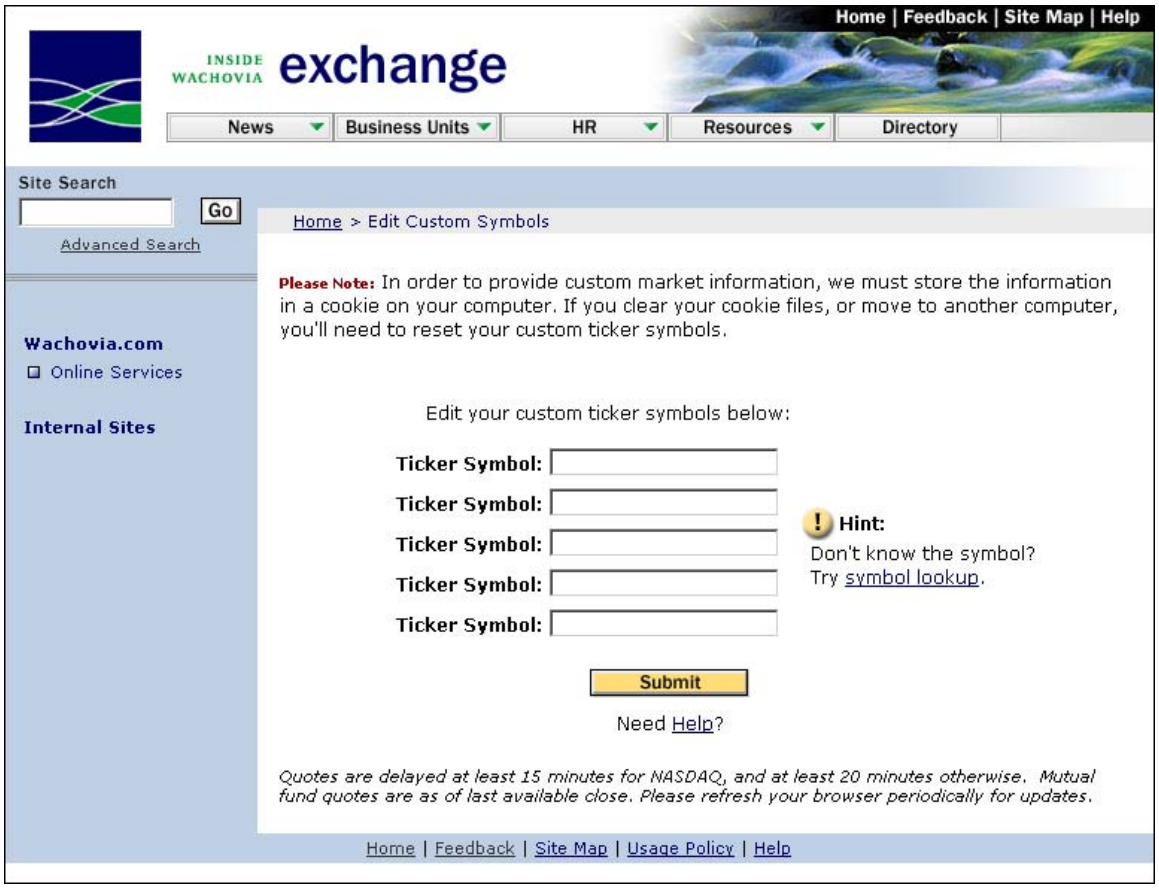
A few corporate news items, such as HR announcements, occupy center stage on the homepage; more corporate news appears in the *Headlines* section below it. For employees to stay interested in homepage news, items must change frequently, and these do. The Corporate Communications group updates them throughout the day — an excellent marriage between Wachovia's technology and news people.

The *About Wachovia* area contains links to other important corporate information.



Pictured: The homepage of Wachovia's intranet, Inside Wachovia Exchange. It presents a lot of information effectively, without being too cluttered.

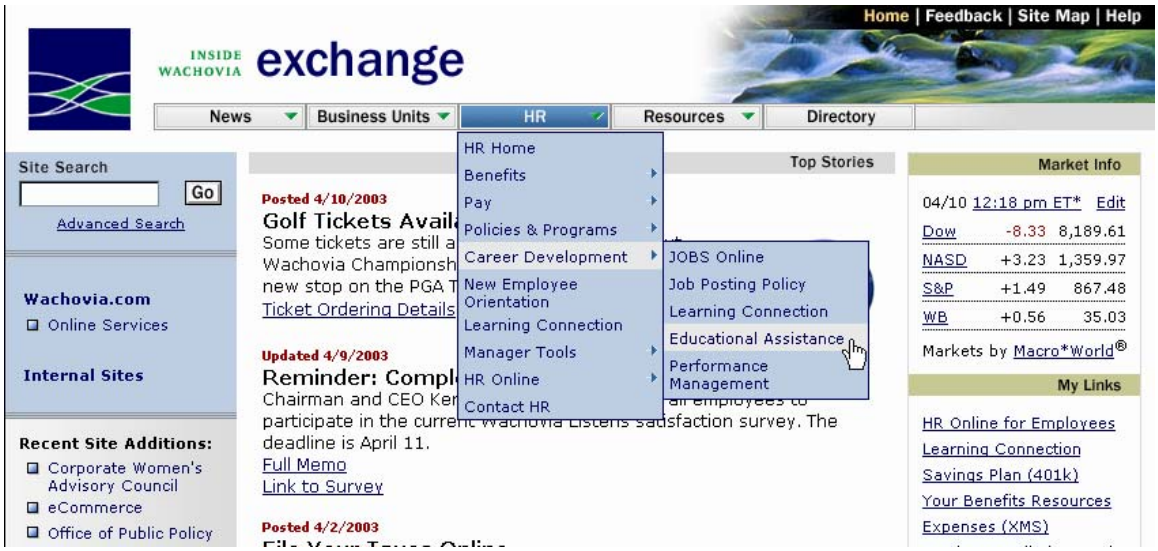
The *My Links* area defaults to a list of common intranet areas, but employees can change the links so that they can quickly navigate to their favorite locations. They can also use *My Links* as a favorites list of intranet or Internet sites. The *Market Info* area provides stock market information on the homepage's right side; users can personalize it by adding up to five stock or mutual funds that they'd like to track.



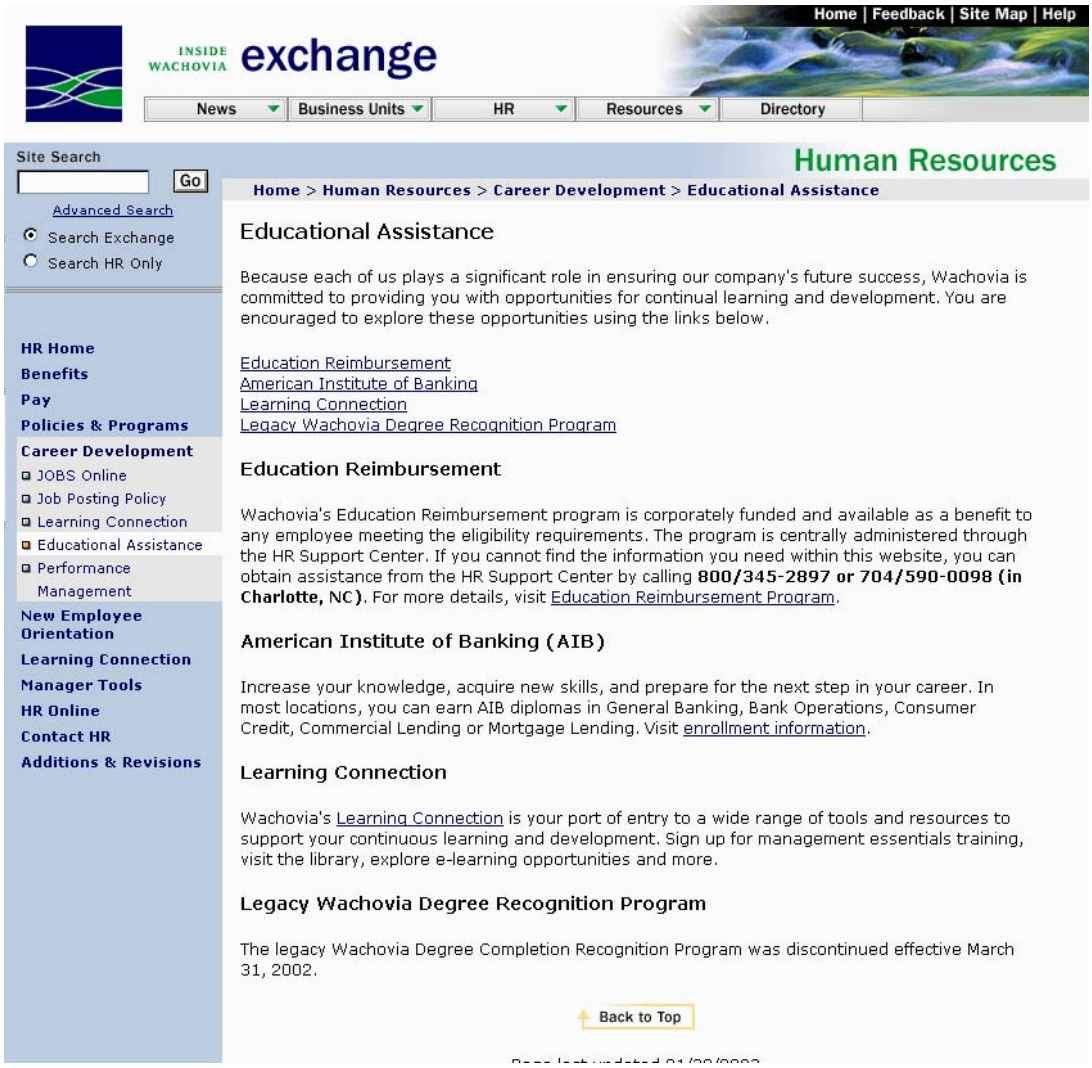
Pictured: A form that lets users enter up to five custom stock symbols to their *Market Info*. The form appears after users click the *Edit* link in the homepage's *Market Info* box.

The global navigation bar across the top of the page, divided into *News, Business Units, HR, Resources,* and *Directory,* is persistent across the site. The site search and topmost navigation elements, *Home, Feedback, Site Map, and Help* are also available on every page. Links to the public Wachovia.com site and online services, such as banking and brokerage, are available on the left.

On many intranets, it's easy for users to get lost once they delve deep into content pages and subsites. But designers used several visual cues to give content pages on this intranet clear navigation. The main section heading identifier appears in the upper right (in green text), reminding users of their general area location. More specifically, the left navigation highlights the user's current location, using color to demonstrate exactly where users are and what related items are available. Finally, clickable breadcrumbs appear at the top of pages, providing context, orientation, and an alternate navigation option.



Pictured: A menu display on the intranet; the next picture shows the result after it is clicked.



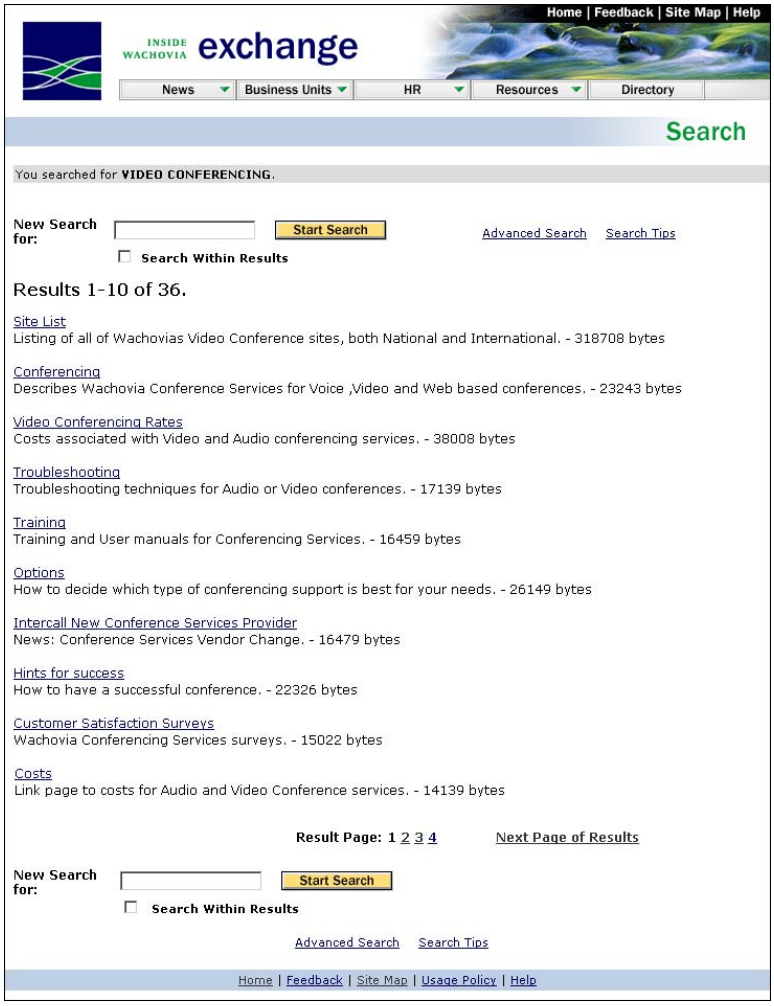
Pictured: A deeper page in the Wachovia site: *Educational Assistance*, which is located under *Career Development* in the *Human Resources* section. The green area identifier and breadcrumbs serve as clear guideposts to the user. In the left navigation, the gray background behind *Career Development* and its related elements visually groups them together. The yellow bullet and white cutout behind *Educational Assistance* reinforces the "you are here" message.

The team was obviously striving for consistency in navigation, and built in many user signposts. Also, an information architect is involved in creating and revising all of the intranet's global and local navigation.

Although it's unlikely that such a clear navigation model will fail users, some still prefer searching. The intranet offers a nice search feature. It defaults to querying the whole site, which is the method we've seen work best on other websites and intranets. But, by simply clicking a radio button, users can choose to search only the site's currently selected area. This is a nice feature for those who care to use it, and it doesn't confuse people who don't.

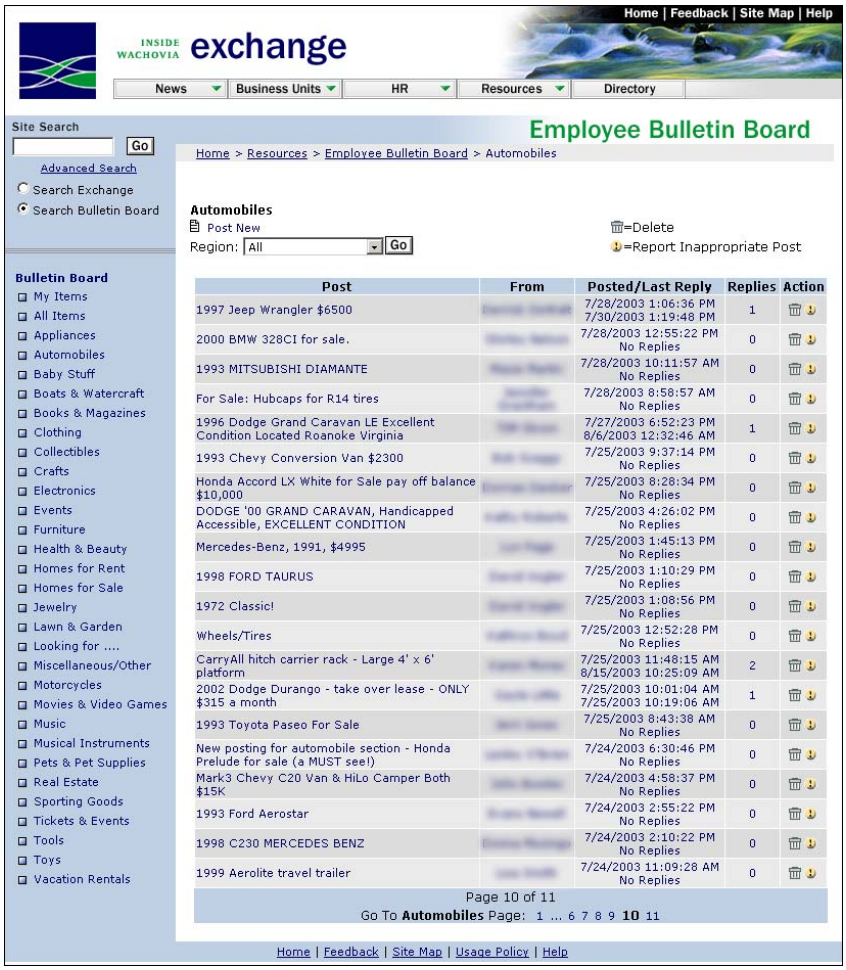
The search results are also well presented, with clear links and descriptive summaries. Authors are encouraged to create short, meaningful description

metadata to help users quickly choose the appropriate link. The search query is repeated, which is imperative in search results. The open search field is available to search again, and even offers the option to search within the results. Finally, an *Advanced Search* link offers more options, but doesn't hinder simple re-searching.



Pictured: An example search results page. In this case, a search for "video conferencing" returned thirty-six results. At the top of the page, the user is presented with a description of what she searched for, an entry box to start a new search (or narrow the existing results), links to *Advanced Search* and *Search Tips,* and a notification of how many returns were generated. The results on this page are all links to HTML pages, but if results link to a PDF or Word document, for example, the appropriate icons would appear to let users know what to expect when they click the links.

A popular feature on the Exchange site is the *Employee Bulletin Board*, where employees can buy and sell personal belongings, find housing or a roommate, and generally gather and share information. Items are searchable by category or seller location.



Pictured: The *Employee Bulletin Board* where employees can buy and sell personal belongings and generally gather and share information.

The Wachovia designers put a great deal of effort into areas that many designers tend to overlook. They created cascading style sheets, for example, and used percentages instead of points or pixels for fonts. Users who want to use the browser's custom text-size function will especially appreciate the latter. Also, the designers built the site so it would scale to fit the user's browser width, making maximum use of screen real estate and ensuring that pages print correctly.

The intranet also looks nice, with a simple grid and soothing color palette. All of these considerations make the employees at Wachovia appreciate their intranet experience.

URL AND ACCESS

Users' access to Exchange depends on their legacy organization. Within the former Wachovia, there is a common desktop and Exchange is the default browser page. Former First Union employees currently have to key in the URL, exchange.wachovia.net, though the plan is to extend the common desktop to them over time. Because of Wachovia's tight security requirements, employees can only access the intranet externally if they have access to the company's VPN.

CONTENT MANAGEMENT

Wachovia chose Microsoft Content Management Server 2001 to build the site and provide a distributed authoring environment that is easy for the average Microsoft Office user to learn.

TECHNOLOGY

Wachovia used Visio to build its IA diagrams, schematics, and paper prototypes; Photoshop 7 for visual design mockups; and Dreamweaver MX to build the high-fidelity HTML prototypes. Its developers built the live system's templates in Microsoft's CMS2001.

GOALS AND CONSTRAINTS

1) Provide Wachovia employees with a unified intranet experience to enhance productivity, employee effectiveness, and organizational efficiency. 2) Build a new intranet site that consolidates the current enterprise site with the legacy First Union and Wachovia sites. 3) Lay the groundwork for the next-generation enterprise intranet.

The team accomplished these goals by:

- Implementing a user-centered design approach
- Applying best practices in website usability
- Gathering feedback from employees, including regular one-on-one usability studies and detailed surveys
- Acting on that feedback to create a cycle of continuous improvement
- Sponsoring a consistent approach to authoring/publishing
- Applying standards across content and applications where appropriate

BASIC INTRANET FEATURES

The site provides easy access to corporate news, business unit and HR information, commonly used online tools and applications, the employee directory, and search.

USERS

With more than 80,000 company employees, an extremely wide range of users depend on the Wachovia intranet daily, from bank tellers accessing the latest HR information to senior executive VPs using the corporate directory.

USER TASKS

There are hundreds of general and specialized intranet functions that employees use every day to do their jobs. The following is a small sampling of supported user tasks:

- Look up employee information in the corporate directory
- Get internal and external company news
- Find HR-related information and policies

- Review and edit personal information (address, work phone, and so on)
- Sign up for a training class and update your transcript
- Apply for a job
- Fill out expense reports and time sheets
- Make travel reservations
- Procure products and services
- Perform administrative tasks

BACKGROUND

On September 1, 2001, two venerable US banks — First Union, founded in 1908, and Wachovia, founded in 1879 — merged to create Wachovia Corporation. The merged company provides financial services to over 9 million households and 900,000 businesses, and has more than 80,000 employees serving customers throughout the US.

Following the merger, Wachovia Corp had no fewer than three main enterprise intranet sites: WNFO, the legacy Wachovia site; Green.com, the legacy First Union site; and Connections, a temporary site created to communicate high-level strategy to the merged workforces. In addition, there were more than 500 team, departmental, and division sites, all with different designs and varying levels of production quality. The enterprise intranet team was formed to create a true enterprise intranet for the new company.

DESIGN PROCESS AND USABILITY ACTIVITIES

In December 2001, the enterprise intranet team began working on several fronts to map out user requirements and structure for the new site. Information architects Kathleen Cannon and Robert Stribley carried out a content inventory and heuristic evaluations of the existing corporate sites.

From September to December 2001, the team also carried out a thorough user research project. The team first conducted a series of interviews with about thirty-five users throughout the organization to gauge their experiences with current intranets and their expectations for future intranet sites. Team members selected participants to represent a broad range of business units, job roles, and geographic locations across both legacy organizations.

The interviews each lasted about an hour, and took place in Winston-Salem and Charlotte, North Carolina. Questions covered a range of topics, including usage patterns, awareness and training, obstacles, usability concerns, IA, graphic design, and unmet user needs. The team then held telephone interviews with users from other locations.

Based on recommendations from legacy organization groups, the team also established a pool of about 300 users representing various business units and job roles. Team members contacted these users via email, gave them an overview of the project scope, and invited them to send questions or comments to a "wish list" email address. This elicited about forty responses.

The team also emailed all 300 users questionnaires designed to help identify differences in expectations, terminology, and mental models of the intranet in the two legacy organizations.

The team used information collected from the interviews, the "wish list" feedback, and completed questionnaires to support the development of an IA that was comprehensible and usable by employees of both legacy organizations.

By March 2002, the team was ready to build the new site structure and produce designs. Several different work tracks ran simultaneously.

Cannon and Stribley wrestled with the challenge of creating a new site structure that would retain the best features of the existing three corporate sites while enabling users to navigate quickly and easily through large amounts of information.

For example, users liked the *Work/Life* section in the old WNFO site; so one challenge was to figure out how to represent it in a more task-oriented structure (it now fits into the *Resources* section).

In addition to looking at user feedback information, Cannon and Stribley did a round of card sorting with ten users — then went away and pondered the results. "We'd lock ourselves in a room for a few days and just spend the time brainstorming," Cannon recalls. They held a second round of testing, again with ten users, using paper prototypes to validate the main section headings.

Meanwhile, work was progressing on the visual design. The team already had plenty of user feedback to build on. Dale Bass, VP, intranet experience team lead, had usability experience from working on the Wachovia Internet site, which proved helpful in the intranet project.

"We pretty much had an idea of what we were looking for, it was just a question of organizing it in the right way," he says. For example, users from both legacy organizations were expecting to see global navigation across the top and local navigation on the left. Also, the blue and green color scheme was a no-brainer, given that these colors were part of the new Wachovia brand.

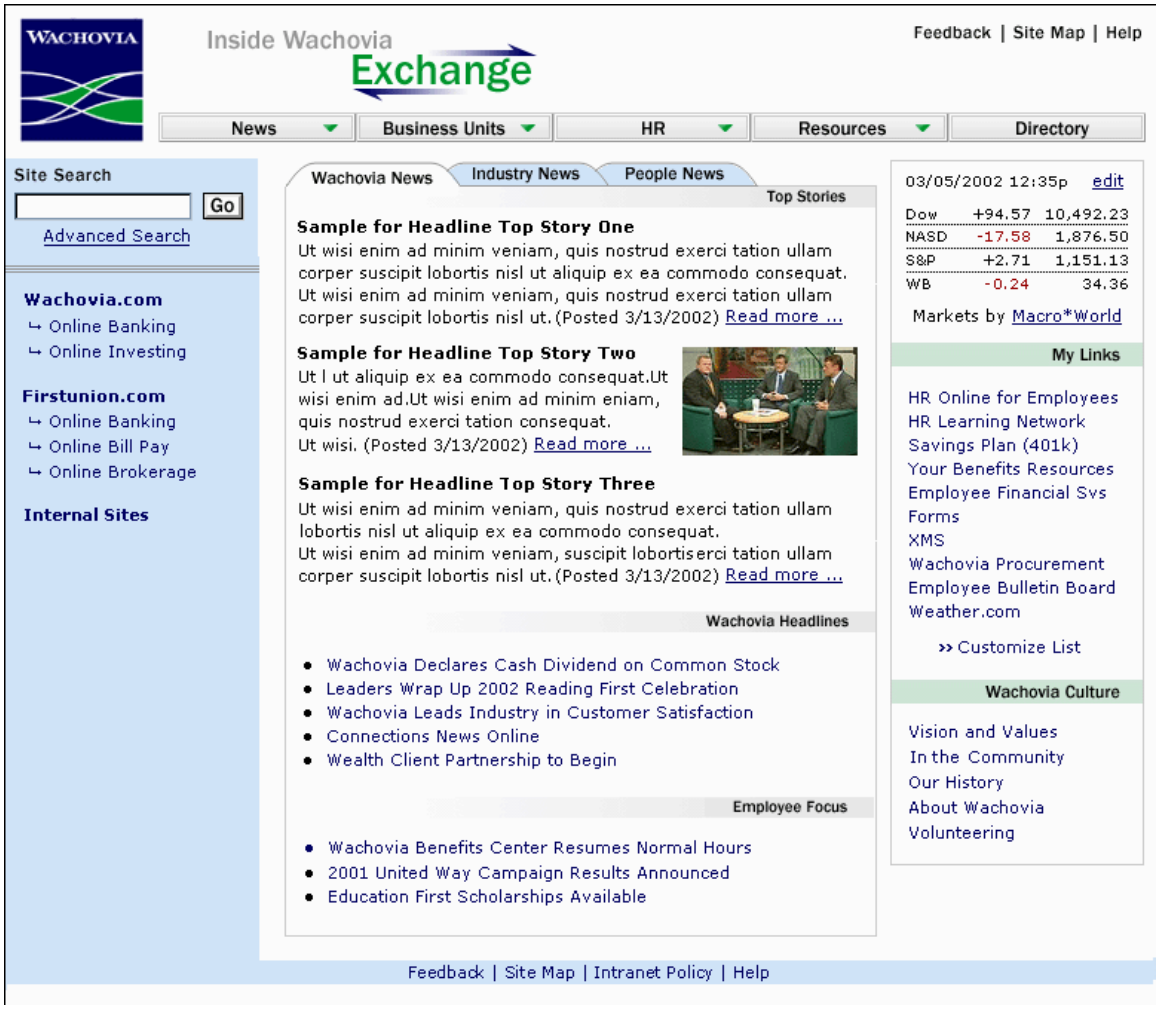
Users had said that the *Connections* homepage had too much text and that the font was too small; subsequent user tests showed that, however much the designers liked smaller fonts, users disliked them — so the font size had to increase. There was also significant demand for better search and a clearer structure.

Some users love drop-downs while others hate them, but Wachovia's user survey "showed that legacy Wachovia users really liked drop-downs — they made that point over and over again," Bass says. "They liked being able to quickly jump a couple of layers into the site."

The new site thus includes drop-downs, but — bearing usability caveats in mind — the team put special effort into making them easy to use. They built several tasks into the usability tests to ensure the drop-downs were fast enough, persisted long enough, were the right length, and didn't occupy too much screen space. They also limited drop-downs to two levels, rather than let them grow as they did on the old WNFO site.

Bass developed some alternative designs in Photoshop, which were then coded in HTML to create high-fidelity prototypes. The team showed these to the corporate leaders, then watched a group of ten test users in the Wachovia usability lab as they attempted a series of typical tasks.

Wachovia has two full-time usability engineers and a well-equipped usability lab, which it uses for several different Web projects. The lab consists of a testing room with a table and chairs for interviews and card sorting, and a desk with a computer, keyboard, mouse, and monitor. The observation room is behind a two-way mirror, and is equipped with two monitors that display what's happening on the lab's monitor.



Pictured: An early (March 2002) version of the proposed Inside Wachovia Exchange design.

The team made several changes to the prototype homepage shown above as a result of user feedback. Team members also modified the design treatment to match other internal communications channels.

Users had trouble finding the links to *Feedback*, *Site Map*, and *Help* in the upper right-hand corner. When testers pointed the area out to them, users said it was too "bland" and didn't draw their attention.

The tab effect for the different types of news in the center column (*Wachovia News*, *Industry News*, and *People News*) did not test well, so that area was redesigned as well.

Several users mentioned that they would prefer a richer, more vibrant design. The team thus made changes to the color palette, while paying close attention to the contrast between colored backgrounds and text. They converted screenshots of proposed designs to grayscale in Photoshop to ensure they maintained appropriate contrast.

Some users failed to spot the colored title separators in the right rail (*My Links* and *Wachovia Culture*), so the team changed the color from a light green to tan.

Finally, they changed the body copy to its current, size.

The new corporate site went live in July 2002, and the team is now working to improve it on an ongoing basis while bringing the many corporate subsites into the new look and feel. "We're probably about halfway through our migration efforts, and anticipate that 75-80% of the sites will have moved over by the end of the year," said Andy Jones, Director of Employee and Corporate Businesses.

Templates control a page's overall look and feel, and business units follow a style guide, but users do have some control over a page's content area.

The corporate intranet team continues to have quarterly intranet forums, where they meet with senior leaders of the bank's business areas and representatives of the author community.

TIMELINE

- Sept. 2001-Dec. 2001: User research program.
- Jan. 2001: Heuristic evaluations and content inventory.
- Feb. 2002: Brainstorming sessions.
- Mar. 2002: Business partner interviews and creation of site maps and schematics.
- Mar.-Apr. 2002: Design phase and usability testing.
- July 2002: Site launched with enterprise-level functionality.

RESULTS

Though Wachovia does not yet have solid estimates of savings from the intranet, the team is working on a methodology, and they hope to provide this information in the future.

"We see the intranet as a corporate asset that needs to be nurtured," says Jones. "Our expectation is that it will grow to be more of an employee portal, and we will need to further invest on an ongoing basis. If we can point to savings in hard dollars as well as soft dollars, then next time it will be an easier sell."

Because the project started from scratch, it is fairly easy to identify the size of the hardware, software, and labor investments. Working out the added value is more difficult; Jones estimates that the savings could well be on the order of several million dollars a year, and the team is hoping to prove that over time.

The team has identified several intranet attributes that it believes will deliver added value. By centralizing development, the company can dispense with certain developer skill sets in the business units. Improved search facilities mean faster access to information, which will improve operational efficiency and customer

service. Getting the right information to the right employee at the right time should also reduce risk.

The team is tracking all these factors on a monthly basis and fine-tuning as time goes on. "For example, where we've made assumptions around the value of better search, we'll fine-tune those on the basis of results," Jones says.

However, keeping track of these indicators is a time-consuming process and, of course, an added cost. "It takes up a lot of time for three to four of us," Jones says. "We're trying to find ways of operationalizing the process and tagging all enhancements with an estimate of value as we go along."

LESSONS LEARNED

Insights from Dale Bass:

Don't forget the content authors. "Pay as much attention to creating a good experience for authors using the CMS as you did to the user experience for the intranet as a whole."

Identify the key people. "There's no way we can meet with the hundreds of groups throughout the company, so we've identified one key person in that group who can be our liaison there, and work on building a rapport with them."

Help build a sense of style. "Take the time to document design decisions as you make them, and use that as a basis to create a formal style guide for authors. Also, we've found it helpful to have the intranet style guide in a very visible location on the intranet, so authors can access it when needed."

Defense Finance and Accounting Service (U.S.)

Using the Intranet:

The U.S. Defense Finance and Accounting Service (DFAS) is the largest finance and accounting operation in the world. DFAS has approximately 15,000 personnel at twenty-six locations worldwide. In fiscal year 2003, DFAS paid more than 5.9 million military service members, civilian personnel, retirees, and annuitants; processed 12.3 million contractor invoices; made 6.8 million travel payments; recorded 121 million accounting transactions; accounted for 279 active Department of Defense appropriations; managed $197.4 billion in military retirement and health benefit funds; accounted for $13 billion in foreign military sales; and disbursed $416.1 billion.

Intranet Team:

In-house: business integration, information services organization, chief information officer, human resources

Members:

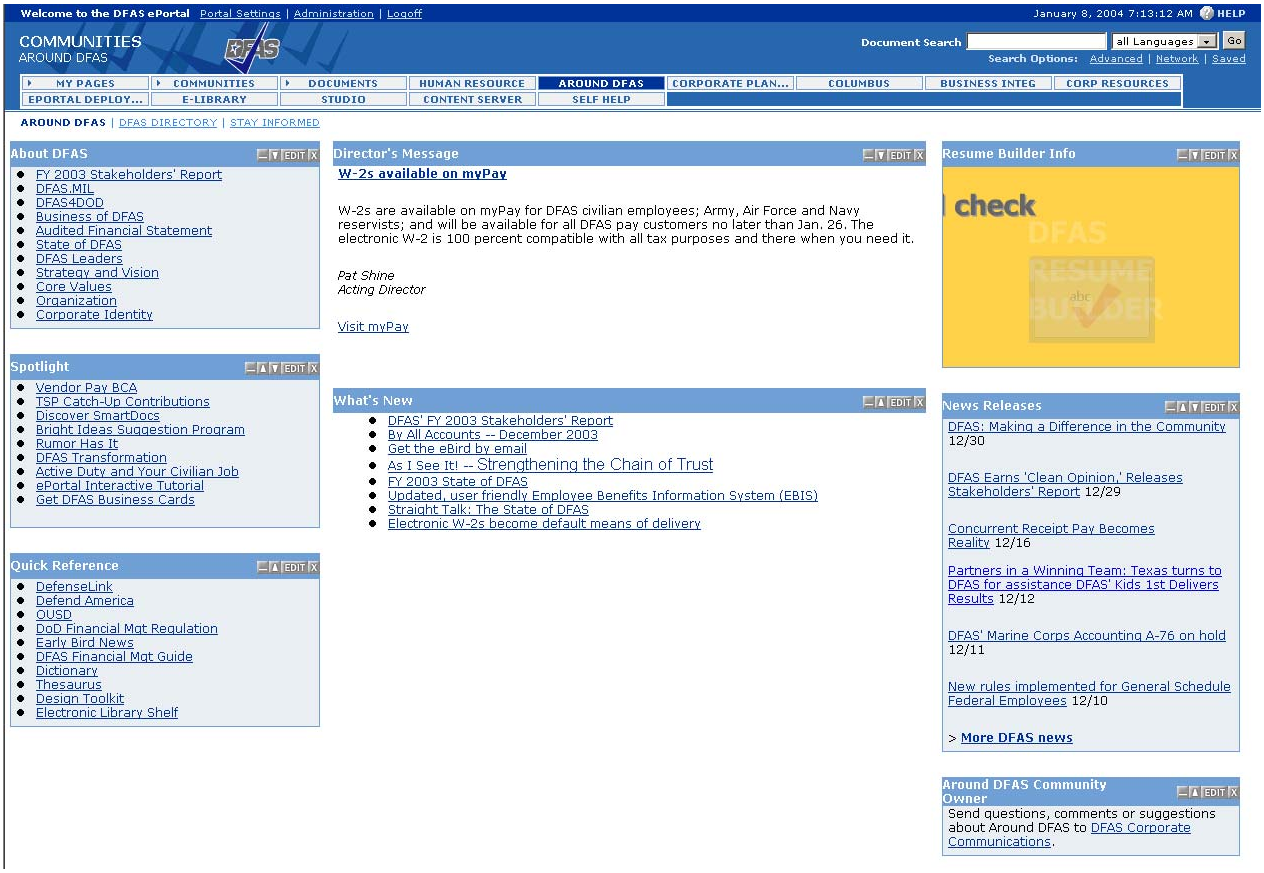
Diane (Dee) Crawford, program manager, DFAS ePortal; Norman E. Noe II, chief knowledge officer; Altaf Hussain, technical project officer, DFAS technical support office; Melissa Johnson, program manager, DFAS content management; Sharon Chapman, program manager, workflow projects; John Hall, project manager, communities and collaboration; Ev Totten, assistant program manager, DFAS ePortal; John Blagmon, computer specialist, DFAS ePortal; Ed Kabat computer specialist, technical support office; Jeff Coffey, computer specialist, technical support office; Mike Debro, computer specialist, technical support office; David Richeson, infrastructure engineer, technical security office; Richard Westmark, infrastructure engineer, technical security office; B.J. Bible, technical project officer, Web ePortal team; Joyce Short, director regional service center, DFAS HR; Linda Frank, project manager, e-HR applications; Mitch O'Brien, project manager, corporate planning; Cory Baumhardt, intern; Adam Ellis, usability testing lab; Paul Plas, computer specialist, technical support office; Paul Mele, computer specialist, technical support office; Grace Greczanik, computer specialist, technical support office; Thomas O. Morris, computer specialist, technical support office

SUMMARY

The DFAS team valiantly consolidated more than 200 individual websites and three portals into one intranet, the ePortal. This collaborative workspace provides direct access to more than 10,000 lines of searchable and reusable content, and lets employees communicate and work effectively.

The ePortal hosts more than sixty organizational and issue-based communities and more than 100 short-term projects. To govern the use of collaborative workspace, the ePortal functional team established new business rules to transition away from e-mail for collaborating on issues and managing events. The ePortal provides content version control and reduces bandwidth requirements for e-mail attachments.

The user's *MyPage* offers a glimpse of the intranet's vast content. The *Directors Message,* press releases, and other news keep employees up to date. All intranet pages have a somewhat similar setup, with titles for sections, and similar items divided into boxed-off areas (referred to as *portlets).* The top horizontal navigation is present on all pages.



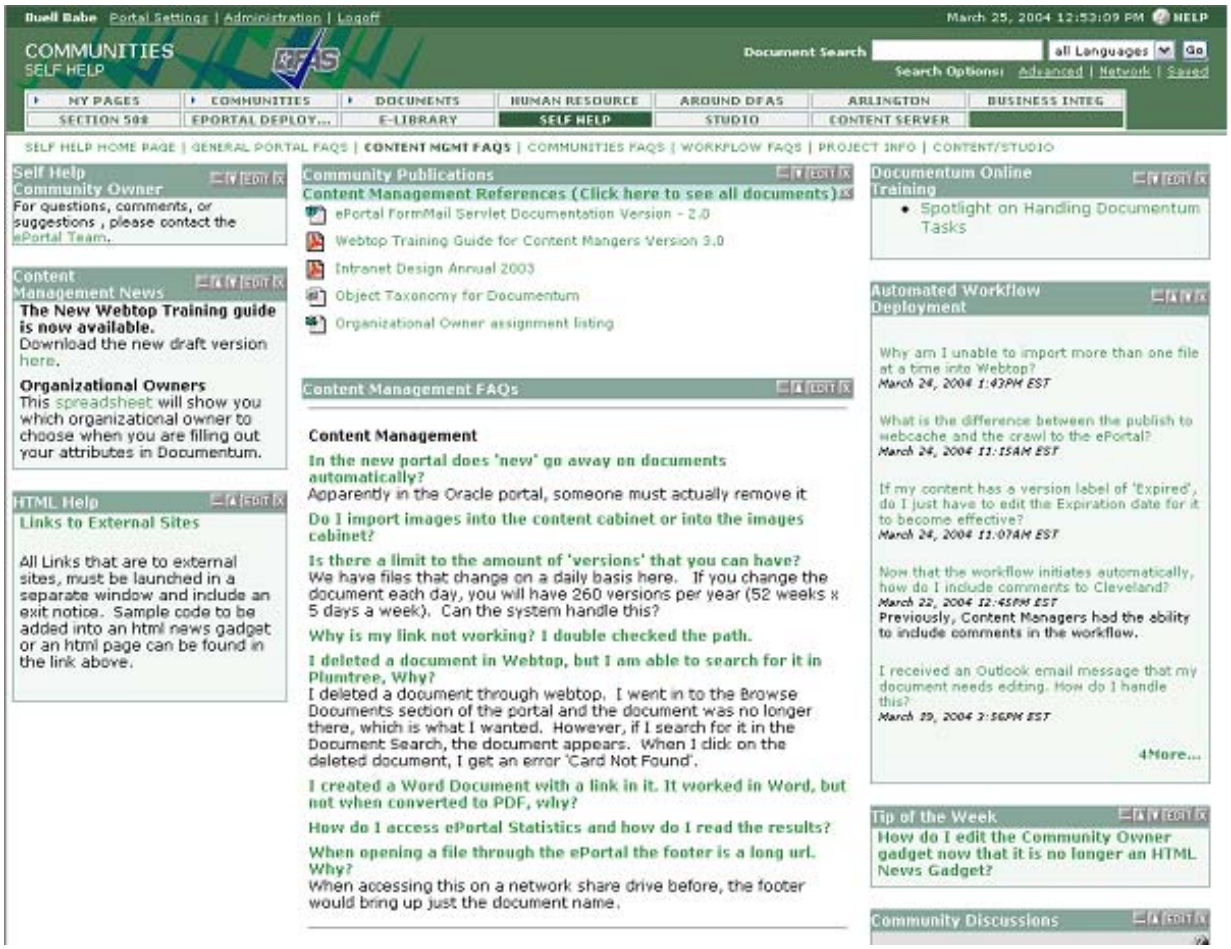
Pictured: The DFAS intranet homepage.

The intranet consolidates business processes and facilitates budget and performance integration. For an intranet to meet these goals, it must be well organized. The team achieved this by dividing the content into three main sections: the knowledge directory, communities, and personalization.

The knowledge directory is essentially a filter. It categorizes massive amounts of information from document repositories, file systems, and websites into an enterprise-wide taxonomy that organizes access to communities, projects, and applications.

Communities let business users and administrators create composite applications. Various teams—including project teams, departments, business units, customers, partners, or the entire organization—can collaborate and share information through communities, which can be managed separately, securely, and hierarchically. Like content provided through portlets and personalized portal pages, communities can include content and functionality adapted for specific users.

Communities also offer better user support by providing new and accurate content. The *Self Help* community, for example, lets content providers find procedures and answers on their own. Each community also has a portlet that provides contact information if users need information that they can't find online.

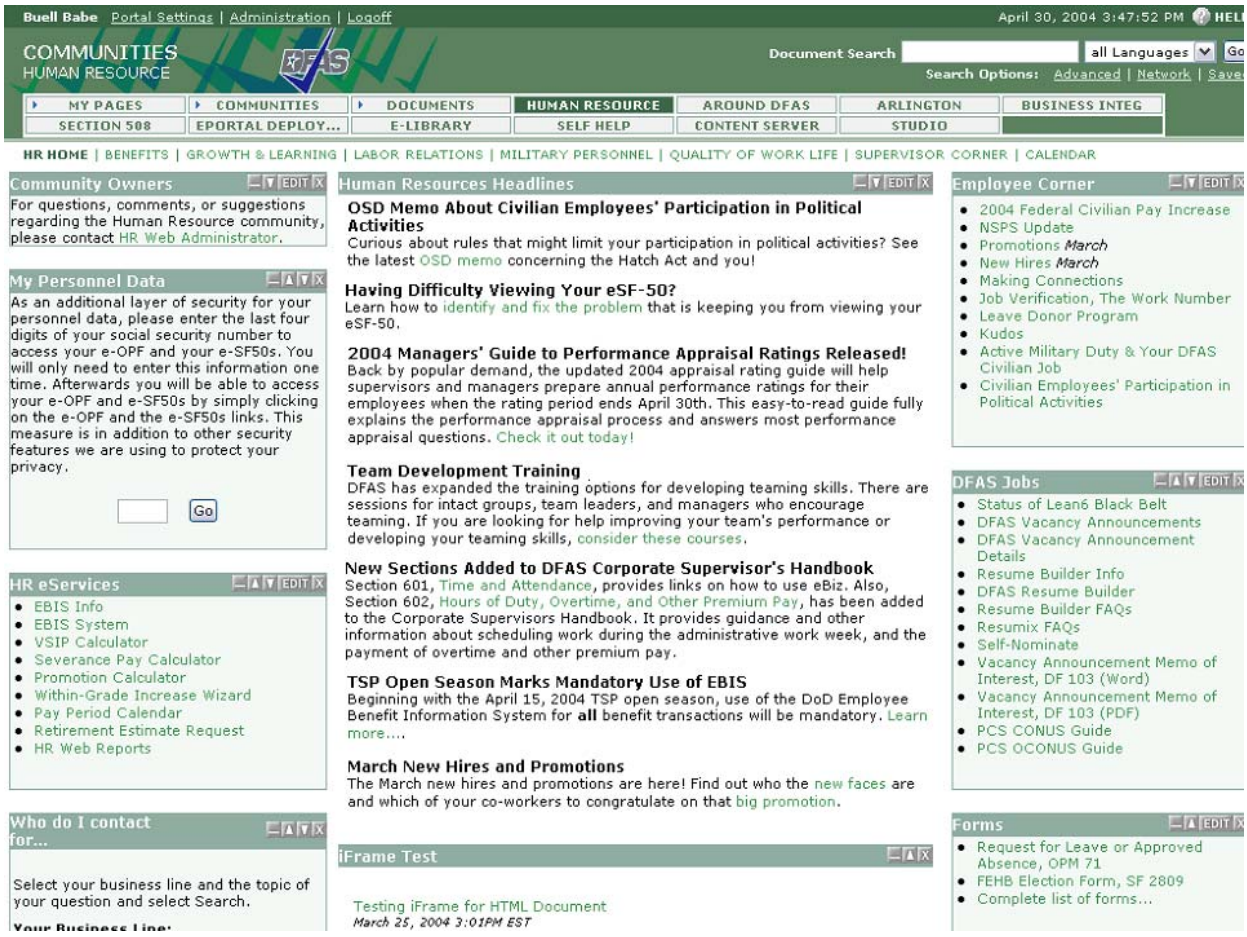


Pictured: An example of a communities page. The *Self Help* community assists users with ePortal-related issues.

Users personalize the site on their *MyPages* area, choosing information, services, and interactive tools on up to six personalized pages. They can also organize the presentation of their personalized portal pages with up to three columns and eighteen different color schemes, meeting each user's specific needs. Users can also access a low-bandwidth or text version of the portal.

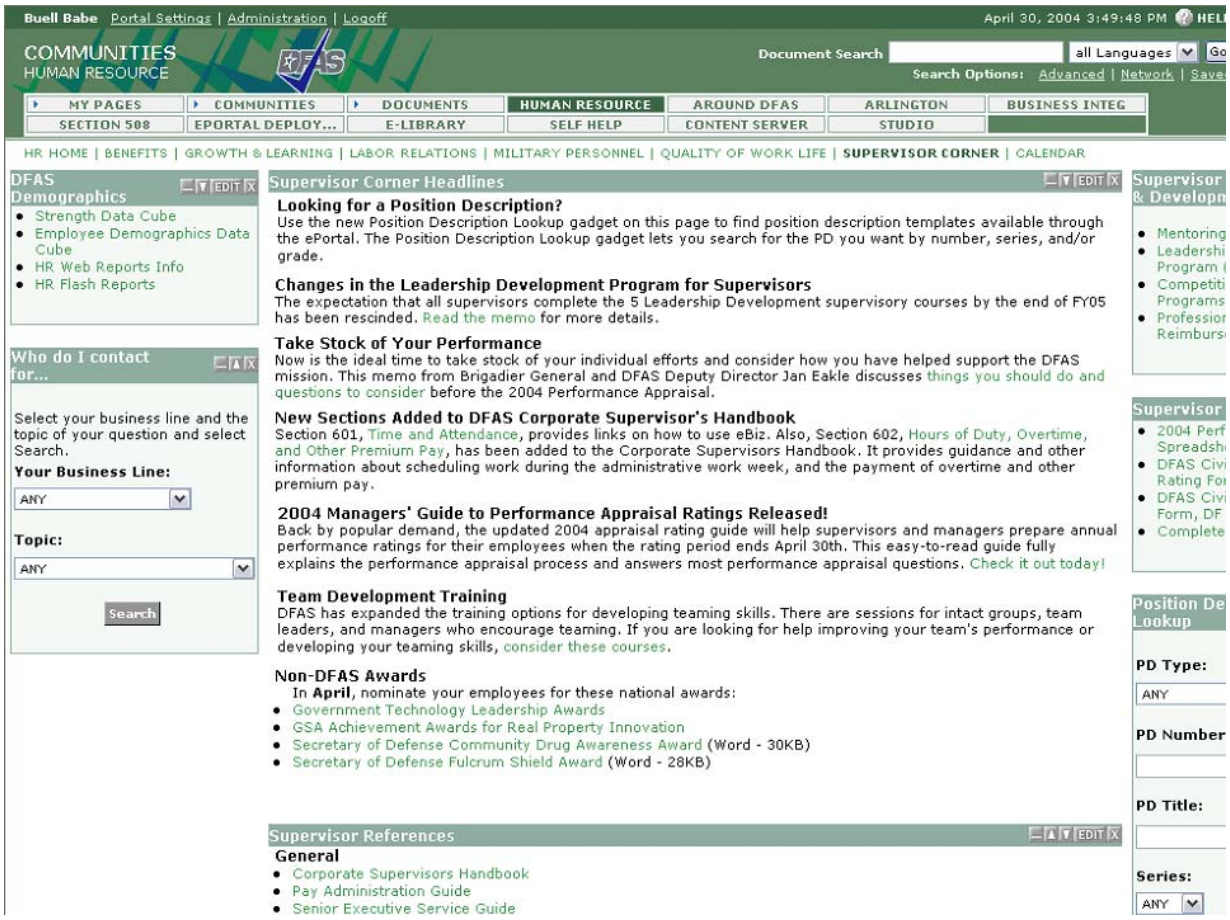
The intranet offers extensive HR information in the *Human Resource* community, such as benefits information, promotion and retirement calculators, promotion and new hire lists, and a *Who Do I Contact?* portlet that provides users answers based on their topic and business line. News headlines about HR appear in the page's center column, so users stay abreast of HR happenings. Using the *myHR Applications* portlet, employees can monitor their personnel information. They can also view their official personnel record there and their Total Compensation Statement.

The design team's recent usability testing and redesign of an HR page resulted in an increase in effectiveness of more than 300% and a decrease in overall task time of more than 50%—a fantastic triumph.



Pictured: The intranet's HR community offers employees an enormous amount of information and numerous options. Users can customize their ePortal's border color on this or any other page.

Managers need access to additional information and applications. To make it simple for them, management-related information resides in the HR community's *Supervisor's Corner*. The layout is similar to other HR pages, but the content is aimed at managers.



Pictured: The HR community's *Supervisor's Corner*, which is tailored for managers.

The ePortal includes many more features, such as *eLibrary*, which houses searchable and reusable information. The *DFAS Directory* stores employee telephone numbers, office symbols, job titles, and locations. In addition, employees can submit training requests for themselves, and managers can submit training request for employees. The *Rumor Has It* feature lets employees submit rumors to senior management for response.



Pictured: Using *Rumor Has It*, employees submit rumors to senior management for response.

These and a plethora of other features help DFAS employees work together resourcefully.

URL AND ACCESS

The intranet homepage URL is https://eportal.dfas.mil. All browsers have ePortal set as the default start page. Every time a user logs onto the agency's network, it verifies ePortal is still the browser's start page, launches the browser, and opens ePortal.

DFAS employees can connect to the LAN and ePortal through dial-up access. Later this year, the agency plans to deploy the Common Access Card (CAC), a U.S. Department of Defense smart card for all active-duty military personnel and civilian DoD employees. Using CAC, "employees with government-issued computer equipment, including a card reader, can access the ePortal from their homes," says Melissa Johnson, DFAS's content management program manager.

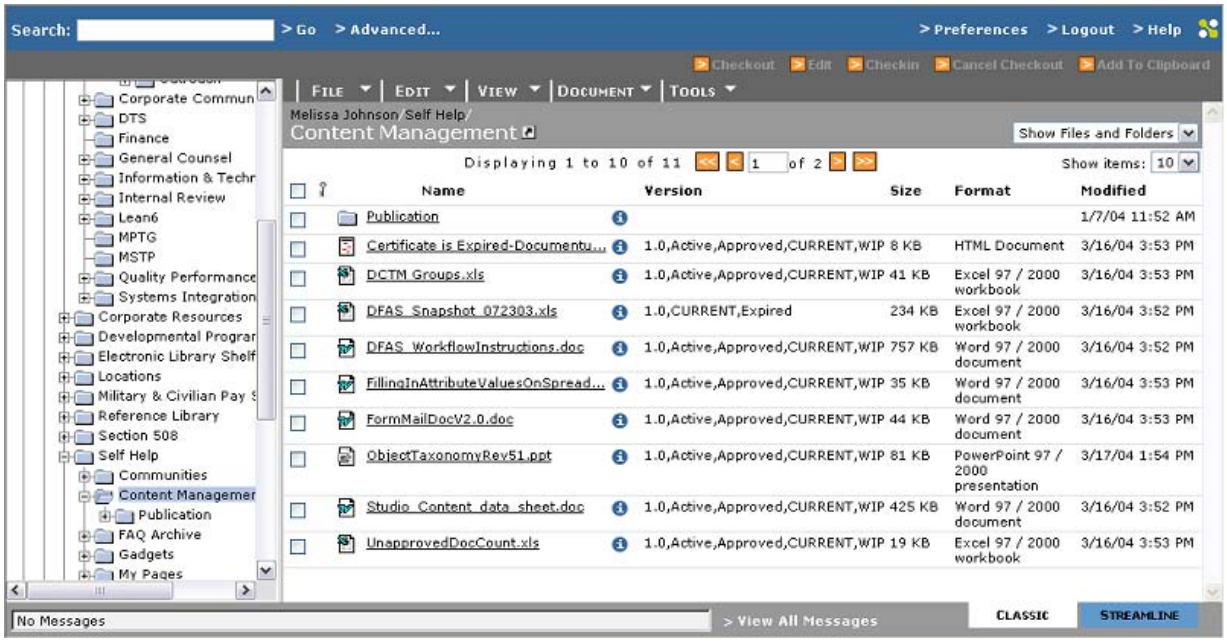
The DFAS employees working offsite at Army, Navy, and Air Force installations access ePortal through local LANs, using either the CAC or a public key infrastructure (PKI) certificate. A special team manually creates an account for any off-site agency employee or customer who wants access, though customers must have corporate sponsorship to receive a membership.

CONTENT MANAGEMENT

ePortal uses Documentum's Webtop client and Plumtree Content Server to manage all content. "Documentum was one of the only content management systems available during the initial deployment," says Johnson, adding that they used it to manage both traditional HTML Web content and non-traditional content, such as Word documents, PDFs, and PowerPoint presentations. The team also customized the Documentum rollout to include DFAS-specific attributes, taxonomy, security, and review processes.

The agency deployed Plumtree's Content Server in October 2003 to manage HTML content; in-progress work is managed in Plumtree Projects. The Plumtree Content Server rollout wasn't customized, except for presentation templates. Project leaders use Collaboration Server tools to check documents in or out, maintain version control, and finish content collaboratively. DFAS is gradually moving all existing HTML content from all twenty-six sites to Content Server.

Content managers upload finalized content to the agency's searchable knowledge directory. "After upload, Documentum automatically starts a customized workflow for section 508 review," notes Johnson, and a specialized ePortal team in Cleveland verifies that content is compliant with Section 508 of the Rehabilitation Act. "This law requires that federal agencies provide employees and members of the public with disabilities access to electronic and information technology comparable to the access available to employees and members of the public who do not have disabilities," she says. If the team doesn't approve the content, it goes back to the content owner to make it compliant.



Pictured: The content management console shows content managers, administrators, and Section 508 reviewers the status of all submitted documents.

That process, plus templates, keeps the intranet content's appearance consistent.

Documentum flags approved content as "active," assigns read permissions based on the content's "organizational owner" attribute, then forwards it to the Web cache every hour.

Each day at 5:30 a.m., Plumtree's Documentum Crawler Web Services software "crawls" the content and indexes it, after which users can access it via ePortal's documents tab or through Plumtree publications.

New Documentum content expires after six months; thirty days prior, content managers get an automated e-mail notification. To keep content active, they must at least check out the content, revalidate it, and resubmit it to the aforementioned approval process.

Content owners are drawn from across the agency's twenty-six locations, generally by business line, product line, or site. Initially, only webmasters inhabited the role, but non-technical people joined the ranks as the tool became familiar. "Our goal is to fully distribute the content management process down to the content-owner level. We are still managing content organizationally, but plan to transition to a functional taxonomy and information architecture as our use of the tools matures," says Johnson. Still, distributing content management already "eliminates traditional IT or Web-team bottlenecks," she says.

The DFAS Corporate Communications office manages the look and feel of agency collateral, and helped design the Plumtree Content Server HTML template.

Despite content managers' occasional circumvention attempts, most users abide by the CMS templates.

Content managers receive hands-on and online training, online user guides, and have access to FAQs in ePortal's *Self Help* community. DFAS uses Plumtree permissions to control community membership and restrict CMS access to the appropriate employees.

TECHNOLOGY

The DFAS ePortal runs on Unix and, as documented above, uses a combination of Documentum and Plumtree Content Server to maintain design and manage portal content. DFAS also uses Documentum for everyday document management.

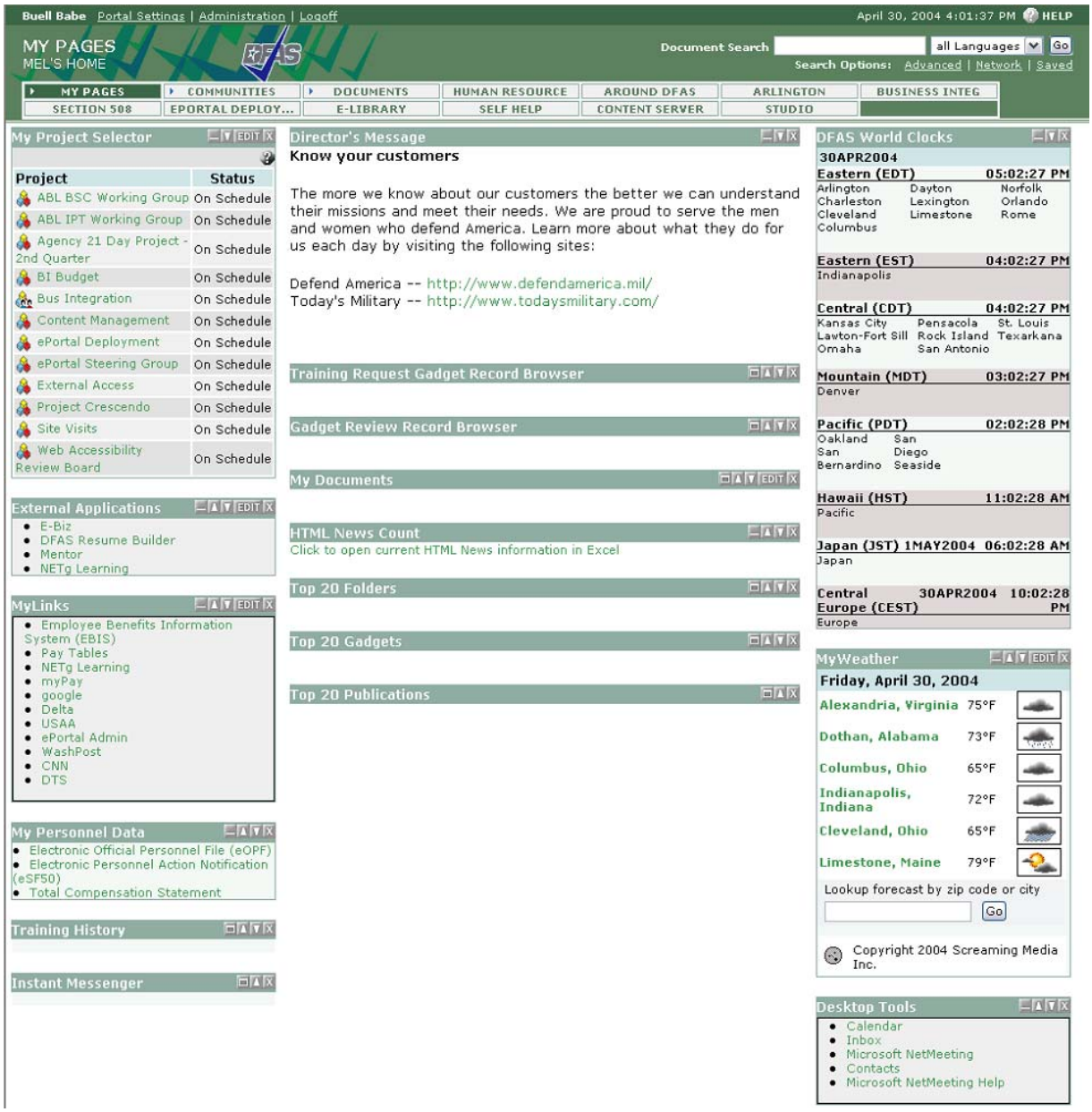
Content Server lets business users with no HTML or programming skills generate articles, updates, and announcements. It also allows universal searching of all DFAS resources—including the knowledge directory—which means that users spend less time searching, and portal administrators only have to manage one search index.

GOALS AND CONSTRAINTS

1) Manifest the DFAS "one organization, one identity" vision. 2) Move multiple portals and more than 200 websites to a single enterprise portal. 3) Distribute content management to the lowest possible levels of the organization. 4) Capture knowledge for reuse. 5) Share information between and among business and product lines, and with DFAS customers. 6) Enable sometimes ad-hoc community and project teams to work collaboratively, whether developing information, designing products, or troubleshooting problems.

BASIC INTRANET FEATURES

As described above, the ePortal has three main sections. The *knowledge directory* applies an enterprise-wide taxonomy to information in document repositories, file systems, and websites, then presents it to communities, projects, and applications. *Communities* are a virtual space for business users and administrators to work together. *Personalization* features let users establish up to six personalized *MyPages* with information and services of their choosing.

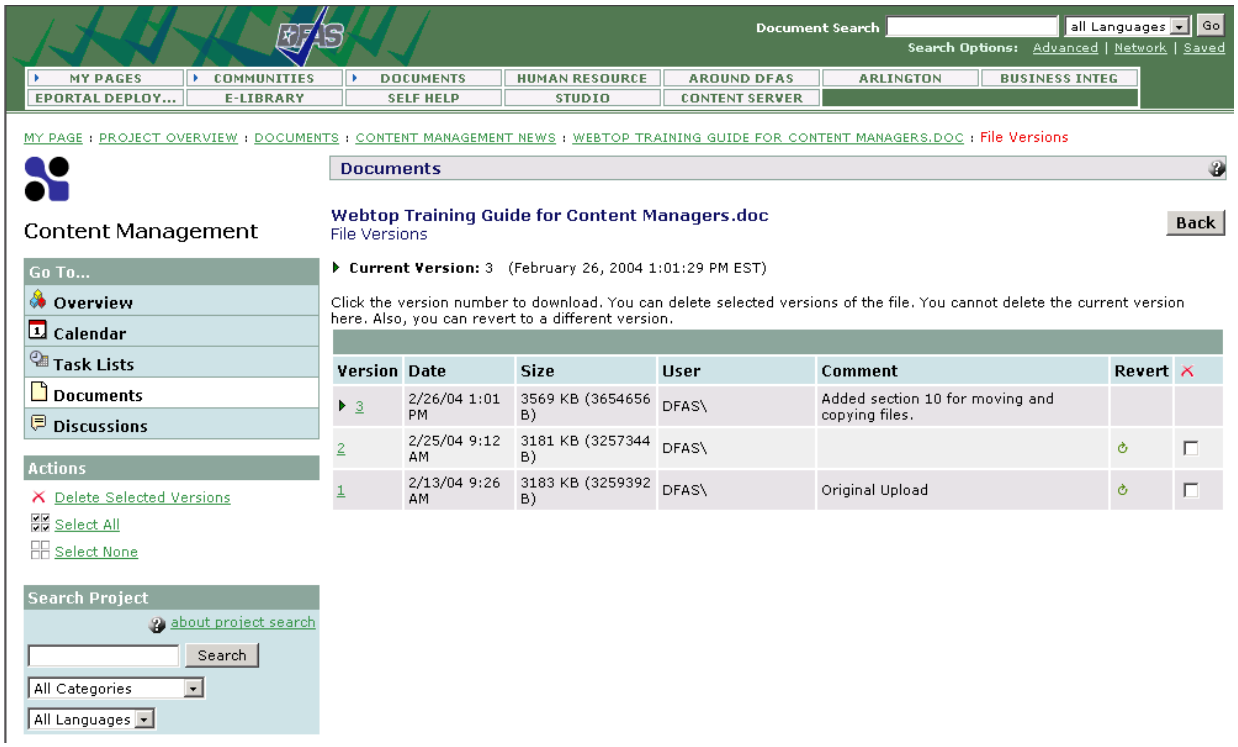


Pictured: Every user can create up to six personalized *MyPages* by dragging and dropping available elements to one of the page's three columns.

Portlets give users preconfigured tools and services, which can be further customized. Each page has up to three columns; users drag and drop interface elements when creating their personalized portal. Low-bandwidth and more accessible versions are also available.

The intranet also offers online project management, and online form creation and management.

Online project management includes collaboration tools such as threaded discussions with easy-to-use forums. Team members can create and track project tasks, and even assign tasks to other users on a group calendar.



Pictured: The project management template gives project teams access to a shared calendar, task list, documents, and discussions.

Documents can be checked in or out, or rolled back to a previous version. Users can also subscribe to various e-mail alerts for such things as new forum postings, document availability, and community content updates.

The software also lets content managers create online forms automatically. Templates give them a range of features: data calls, calendars, polls, and surveys. DFAS uses Plumtree Studio; content managers don't have to do any coding.

Developers also get an integrated application-building environment. One especially useful feature is shared authentication resources, which lets developers integrate new applications into intranet URLs, reducing the number of times a user must log on.

USERS

DFAS has about 15,000 personnel at twenty-six national and international locations. It is the world's largest finance and accounting operation.

USER TASKS

- Read news
- Use the employee directory to search by name, telephone number, organization code, and location
- Train online through the *Self Help* community, and read its FAQs and tip of the week
- Collaborate on projects

- Learn to use the intranet through twenty-five training modules, which range from logging in to customizing pages to advanced searching techniques
- Use the eLibrary to access official DFAS information and publications
- Read the *Director's Message*, which automatically loads on users' *MyPage*
- Monitor personal HR information and access the *Who Do I Contact?* portlet for answers to questions based on topic, employee business line, promotions, and new hire lists.

BACKGROUND

"In the mid-1990s and long before portals were even considered an option, the DFAS intranet started much like most federal agencies: we had a small group of employees that were familiar with the working of the Internet, could spell 'HTML,' and who were good at developing and managing applications," says Johnson. So, DFAS gave the group responsibility for creating websites, managing content, and driving DFAS's Internet strategy.

The approach was successful—perhaps too successful. Frequently, DFAS would develop an on-location website to support customers, only to find that another DFAS business unit targeted the same customer with an almost identical website. Besides duplication of effort, the Web group didn't scale with the number of sites, eventually making the content creation and updating process "long and cumbersome," notes Johnson. On the other hand, the Web presence represented "a huge leap beyond mail and the telephone," she says, and dramatically improved information sharing with customers.

The next-generation intranet was dubbed *InfoWeb.* Yet InfoWeb lacked a crucial feature—"the enabling tool set that could foster knowledge management," notes Diane (Dee) Crawford, the DFAS ePortal program manager. Intranet information improved and integration reduced duplicate efforts, but DFAS hadn't changed its work style to maximize the new possibilities. DFAS continued to search for a content management tool able to delegate content creation and allow collaboration.

At roughly the same time, between 1999 and 2001, DFAS leadership was visiting a who's who of successful U.S. corporations—Microsoft, Motorola, Hewlett Packard, Ford, IBM, Lockheed Martin, Raytheon, Bank of America, and Computer Sciences Corporation—to study their success.

The companies had one thing in common: a portal. "Each had applied some sort of portal technology to enhance performance, facilitate customer service, and increase technological support to management and the workforce," says Norman E. Noe II, DFAS's chief knowledge officer.

Based on its findings, DFAS management created a "one organization, one identity" initiative. Creating a prototype portal, and migrating multiple portals and over 200 websites to a single portal, however, would take time.

The initiative got a boost in February 2002 when DFAS director Thomas Bloom stated that DFAS could not be a world-class finance and accounting firm without implementing an enterprise portal. Work began in earnest.

The mandate: roll out a prototype in sixty days using existing software and licenses. The portal didn't yet have a budget. The intranet design team, formed by representatives from the offices of business integration, the chief information officer, and technical services, developed the initial requirements, drafted a deployment plan and methodology, and

determined which in-production technology could meet their needs. They also built intranet templates to standardize the look and feel.

"The development and deployment of a prototype portal was intended to represent the solution to the director's challenge, however it became evident during the requirements-definition and development phases that the existing software suite did not contain all the functionality and technical capabilities needed to implement a knowledge management methodology," says Crawford. The team decided to tackle functional and technical requirements instead.

The prototype was deployed fifteen days ahead of schedule, "and at no additional software or licensing cost to the agency," says Noe. "This was a major first step." DFAS now had an enterprise portal easily accessible to users on their desktop. While it consolidated electronic content, however, the portal lacked many features, including single sign-on, searchable or reusable content, interactive workspaces, and automated workflows.

From April through May 2002, DFAS used the prototype to: document everything an in-production, enterprise portal should have; write a business case analysis for moving to a single portal; and create an acquisition plan to ensure the new portal was in place by the end of 2003.

"If we had stayed with our prototype, we would have had to be our own software company to build and maintain all of the unique attributes required to operate our business," says Crawford. In other words, DFAS needed a new solution using common, off-the-shelf components. "Software development and the management of infrastructure is not a part of our core competencies," says Crawford.

The team was given 120 days to find its enterprise portal software, and $2.5 million—originally budgeted for another program—was freed for the whole rollout.

One of the team members' first tasks involved usability. They used research from Gartner Group and Giga Research to determine which portals best addressed customer requirements, and which intranet applications were most popular. Beyond guiding purchasing, this approach had two benefits: it was an independent usability benchmark, and it focused DFAS's own application development.

DFAS also visited several private organizations and federal agencies to study their intranet use, and discuss rollout and development times and their ongoing redesign philosophy. Organizations visited included Hewlett Packard, IBM, Computer Sciences Corp., BearingPoint, PricewaterhouseCoopers, and the Army and Navy. "All of these visits and discussions help to set expectations on what could be accomplished—and how quickly—and to identify the key steps in the evolutionary process," says Crawford.

The agency found a product suite with its sought-after features: decentralized content management, real-time collaboration, and electronic workflows. The team adopted the software, noting that it would improve customer service and intranet performance, and reduce intranet operating costs.

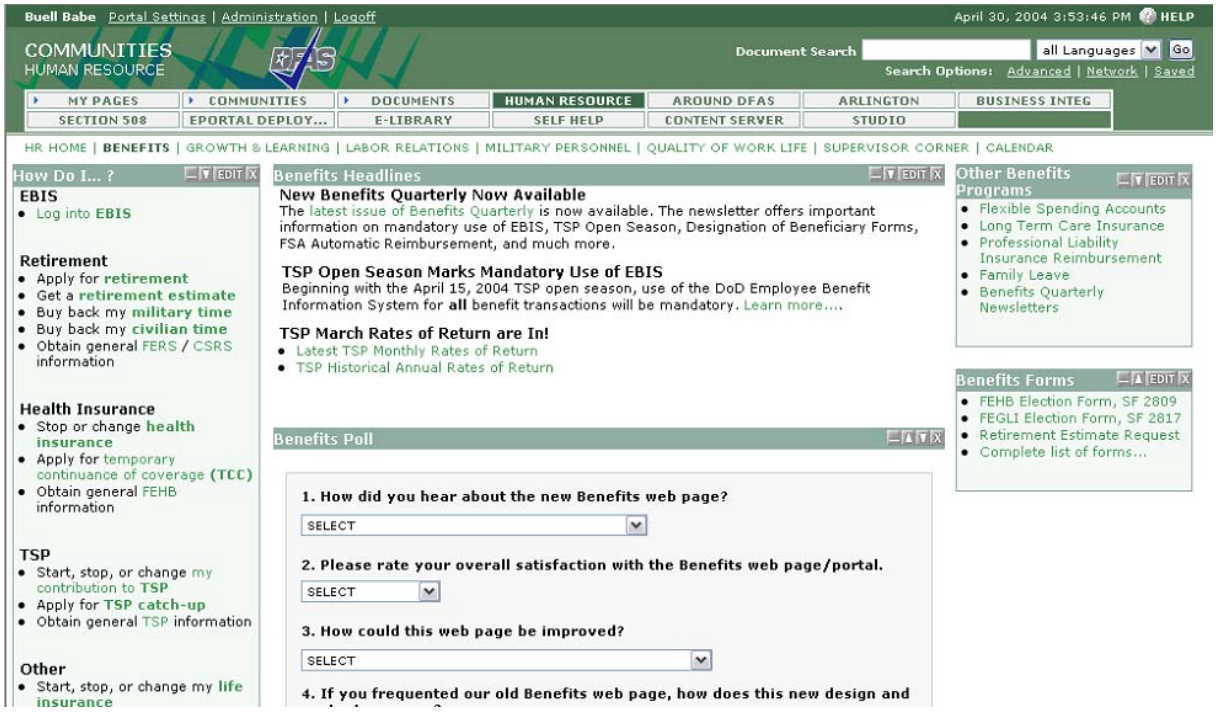
DESIGN PROCESS AND USABILITY ACTIVITIES

The DFAS usability lab, part of the HR department, identifies intranet aspects to improve based on direct user feedback, content manager requests, and, of course, usability testing. The team also publishes all findings to an ePortal usability community. "The findings and results of usability testing on one system or part of the ePortal are often directly applicable to another part," notes Ellis.

To redesign the existing portal and take advantage of Plumtree functionality, the team focused on common, everyday tasks. "We do not focus on fringe scenarios or tasks, but rather on the ones that will impact the greatest number of people, including the basic navigation of the portal, customization, search, and collaboration," says Crawford.

One intranet area offering opportunities to improve service and reduce costs: the HR benefits section. "The HR benefits area was being swamped with phone calls," says Adam Ellis, an HR IT specialist. The existing intranet content obviously wasn't doing its job, so the HR content management team increased the amount of benefit information available. The calls still didn't stop.

Through usability testing, "it became apparent that the problem wasn't a lack of benefits information, but rather that no one could find what they were looking for," says Noe. The usability lab subjected the call center to a Six Sigma study (wherein any process outcomes within six standard deviations from the mean must be acceptable). Through this process, the lab identified the most common questions, then redesigned the HR portal using usability testing, heuristic evaluation, and log analysis as a guide.



Pictured: The redesigned HR benefits community targets employees' questions through a FAQ, plus directs them to all-new tools containing precise benefit, retirement, and other information.

Before releasing the new intranet, DFAS also created a series of twenty-five intranet training modules, to take users from logging in to page customization to advanced searches.

TIMELINE

- February 2002: Team formed to create one portal for entire enterprise using existing software and licenses. Deadline: sixty days.
- May 2002: With portal requirements finalized, development begins. Though portal development hadn't been budgeted, $2.5 million for the entire rollout is re-

allocated from the business integration office budget. Goal: finish rollout within 120 days. The team identifies the top twelve private-sector portal-software vendors available via the federal government's General Services Administration schedule, then reduces the list to nine. DFAS gives each remaining vendor two weeks to respond to a Request for Information. From these responses, DFAS selects seven finalists.

- August 2002: Conference held with seven finalists to explain requirements. Vendors give oral presentations, evaluated by the portal development team and additional experts. Four finalists are selected. Each receives equal time and access to DFAS's Indianapolis facility to do an inside-the-firewall presentation. The intranet team ultimately selects Plumtree.
- February 2003: Intranet deployment and testing begins.
- June 2003: Beginning of phased deployment to load test and evaluate intranet functionality. All twenty-six sites completed in thirty days.
- Fall 2003: ePortal wins a Plumtree "No Empty Portals" award in recognition of best practices and high return on investment.
- December 2003: Design, development, and deployment of automated workflow and content management begins. Target rollout: spring 2004.

RESULTS

As befits a project that constantly met tough deadlines with room to spare, the portal launched ahead of schedule. The rollout "executed on time and under the government's cost estimate, and the portal was deployed agency-wide on a newly designed and tested production platform before July 2003," says Noe.

The portal meets the "one organization, one identity" mandate in spades. The new portal consolidates three old portals and more than 200 websites. Users have access to more than 10,000 lines of searchable and reusable content. Project teams can rely on content version control and can store documents on the intranet, meaning fewer e-mail attachments gobble up network bandwidth.

In fact, through new organizational guidelines, the ePortal team hopes to completely switch users from e-mail to the intranet for such tasks as trading documents or collaborating on events by the end of 2004. By the end of 2005, DFAS expects all collaboration to be done via the intranet.

Currently, the intranet contains sixty communities and supports more than 100 business projects. Many of those were transferred from the previous portal, but new ones have also sprung up to handle recent projects, such as decreasing the accounting cycle to twenty-one days (see below).

Based on before-and-after usability testing, DFAS was able to quantify a number of improvements. For example, reduced sign-on helps employees move more quickly to different parts of the site, while improving employee access to HR information reduces call center and printing costs. Overall savings: approximately 200 staff years.

By consolidating many online applications, including time and attendance reporting, e-learning, a resume builder, and a mentoring-network tool, DFAS reduced the time it takes to support those applications, saving more than ten staff years.

The new portal also improves knowledge capture and reuse. "One of the growing issues within the federal government is the aging workforce and the loss of critical knowledge as

senior managers walk out the door," says Noe. Capturing that knowledge is imperative. In addition, the portal helps focus captured knowledge by problem area, and lets different business lines reapply existing best practices, enhancing efficiency and reducing costs.

Several new tools make life easier for users. For example, one reduces the number of times a user has to sign on to different intranet applications. "This portlet allows users to enter in individual application log-in information such as user name and password one time," says Noe. The tools then handle reduced sign-on to a number of existing applications.

The eLibrary houses all of DFAS's official information and publications in a single location. "This includes all of the information that the agency would consider to be searchable and reusable," says O'Brien. Like a well-equipped city library, it's a one-stop shop for users, yet accessible via their browser.

A tool called *Screaming Media* gives users access to many media resources, including global, financial, and sports news, and weather reports with maps for nine locations. One community, *Around DFAS*, includes DFAS-specific news, messages from the director, and other information to keep employees informed.

DFAS employees now get instant access to their HR information online. For all 15,000 employees, annual HR statements are no longer mailed; they can only be accessed online. By eliminating mailings, DFAS expects to save $100,000 a year. Looking back, having a dedicated usability lab has paid off, says Noe. "Reading [Jakob] Nielsen's [writings] and attending various usability conferences opened our eyes to the fact that incorporating usability into product design doesn't have to cost millions. Not counting the three computers and TV that HR already had, and the two empty rooms for the space, HR spent roughly $1,500 equipping the usability lab."

The usability team is beginning to conduct more intranet user surveys to gauge their satisfaction with the intranet and design iterations.

The intranet is already supporting an ambitious, mandatory plan to reduce the time it takes DFAS to generate a suite of DoD accounting reports from forty-five to twenty-one days. "All of the military departments and defense agencies have different requirements and different tasks associated with generating their unique accounting statements," says Noe. The plan is a huge undertaking, however, as the sites generating accounting statements are spread across the country. DFAS's project team has identified more than 200 tasks and 1,400 subtasks to be completed and tracked. Using e-mail or spreadsheets was deemed too cumbersome; it's using the new portal instead.

That model holds going forward. By relying on the intranet to support critical, near-term projects, DFAS expects to create expert users and success stories that will drive intranet use throughout the organization, and better enable the usability lab to hone the intranet's usability. "The real portal integration work happens in the target applications," says Crawford. As users learn the portal's features and capabilities, they can better design new portal-specific applications and reap additional benefits.

LESSONS LEARNED

Insights from Dee Crawford and Norman Noe:

Employees always resist change. "As the old saying goes, 'It's tough to think about draining the swamp when you are surrounded by alligators.' While transitioning functions to a portal would add tremendous value, improve customer service, and foster savings, it's hard to start moving toward that when DFAS managers are trying to ensure that the soldiers in the trenches in Afghanistan and Iraq are being paid correctly. This is not a new

lesson, but one that is documented in case after case where change is introduced. It's just part of human nature: change is hard. To overcome that, development and acceptance of a new standard is key."

Real-world success drives use. "Identify a select group of projects, then use these as initial steps to move forward. Yes, it's true that this approach will take a little more time, but the result will be the development of a group of strong intranet users and supporters. Early business unit successes and aggressive marketing ensures all users will 'get' the intranet too."

Consider "all-or-nothing" carefully. "Portal software vendors were not restricted to selling DFAS a single tool—they could partner with another vendor—but the proposal had to be a single solution. However, while DFAS received a very robust and workable suite of products, we might have gotten a more integrated toolset if we'd given the winning vendor more flexibility in making substitutions due to product changes after it was selected."

Don't implement everything at once. "Separate the content management from the workflow and the collaboration, and do them one at a time rather than trying to do them all at once. This approach provides more time for training, familiarizing users with new features, and deploys content management—the most used or indirectly used feature—more quickly."

Don't mirror organizational structure. "Our initial ePortal information architecture mirrors our organizational structure. While this made the content migration from previous versions of our intranet much easier for both content managers and the ePortal content management team, it only perpetuated the less-than-usable design and users' inability to find information. Our future project list includes a total redesign of the DFAS information architecture to make it functionally based, and much more intuitive for all users."

Federal Reserve Bank of Richmond (U.S.)

Using the Intranet:

The U.S. Federal Reserve System includes twelve District Banks and a Board of Governors. The Federal Reserve Bank of Richmond is the fifth Federal Reserve District, headquartered in Richmond, Virginia. It serves Maryland, Virginia, North Carolina, South Carolina, and West Virginia. Although established by Congress as a private stock corporation, the Reserve Bank operates in the public interest, rather than for the profit or benefit of any private interests. As a regional Reserve Bank, the Richmond Federal Reserve gathers and analyzes economic data on the Fifth District and contributes to the formulation of national monetary policy. The Richmond Fed supervises and regulates banks and financial holding companies in the Fifth District, processes currency and checks for banks, and provides financial services to the U.S. Treasury.

Intranet Team:

An outside agency, Ironworks Consulting, worked with Federal Reserve Bank of Richmond staff

Members:

Federal Reserve Bank of Richmond: Marsha Shuler, senior vice president and executive project sponsor; Lisa Oliva, assistant vice president and business project owner; Connie Frudden, assistant vice president and technical project owner; Sandra Tormoen, assistant vice president and technical liaison; Kendall Meddows, project manager, content and design; Ann Tindall, project manager, technology; Trisha Grande Meade, content lead; Dennis Ott, technical lead; Ronnie Anderson, developer; Mark Andrachek, developer; Donnie Bergh, developer; Anne Hallerman, information architecture and meta-tagging consultant/liaison; Cathy Tyler, project integrator

Ironworks Consulting: Bhadresh Patel, engagement manager; Catherine Brown, user experience strategist; Chip Trout, information architect; Bill Buell, creative director; Chris Hull, creative designer; Shell Harris, creative developer

SUMMARY

The Federal Reserve Bank of Richmond's intranet, *5Spot,*[8] is a communication tool that keeps 1,500 users in several different locations apprised of current events. Forums and other information collection keep employees in touch, and the persistent navigation—which presents the most needed and used features—makes this intranet very straightforward.

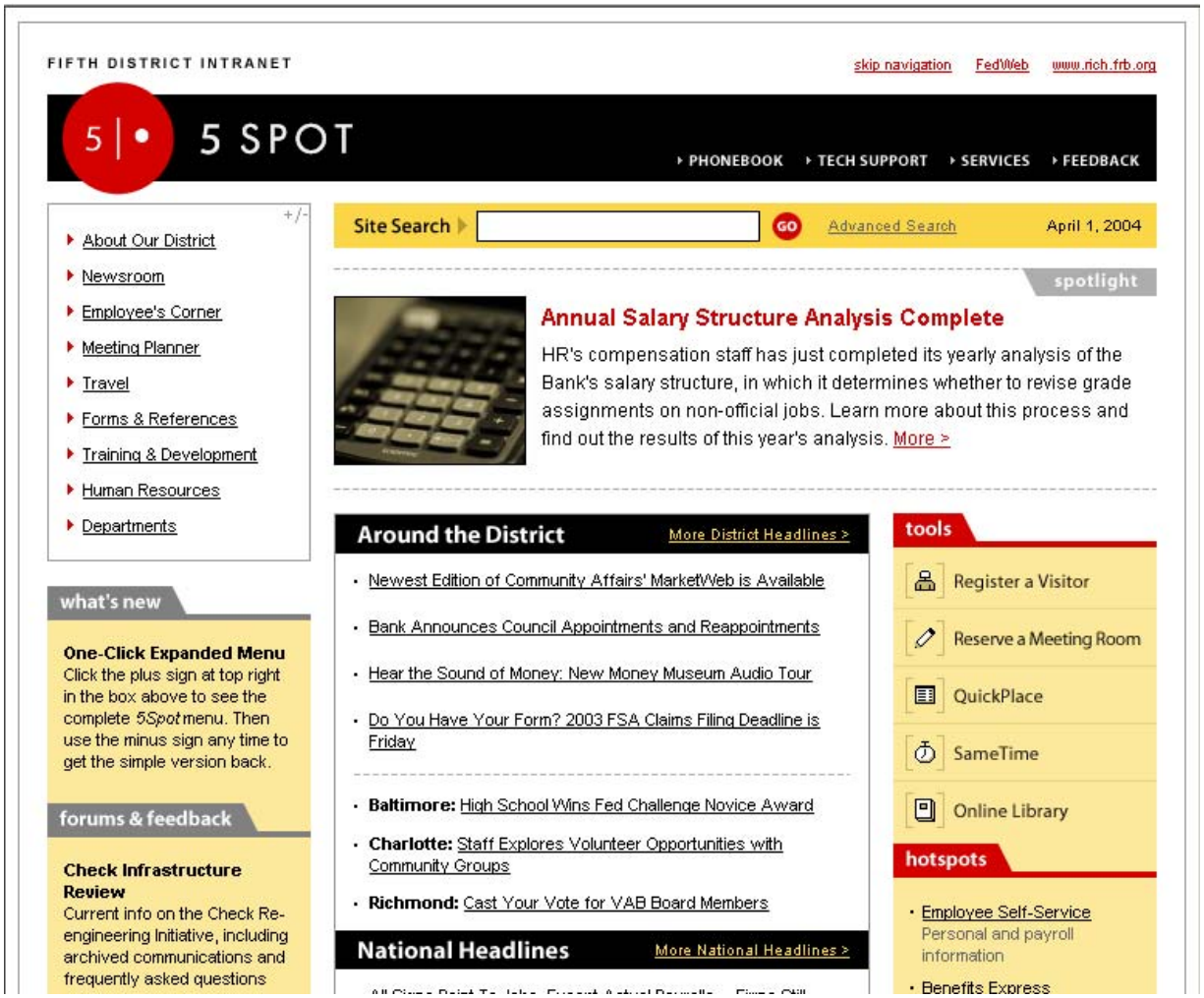
To heighten employee awareness of work-related information, the intranet offers a comprehensive news section for the entire district, as well as local news for Baltimore, Md., Charlotte, N.C., and Richmond, Va. Delivering this timely and relevant information can increase employee knowledge of the Federal Reserve System, the Fifth District, and departments within the Fifth District, and help users make more informed business decisions.

The intranet also facilitates business-related collaboration among its users, including a large group of traveling bank examiners, and operations employees who don't have PCs at their workstations. News and forums can also foster a sense of community among departments and locations in the Fifth District.

The homepage's center column is reserved for news. Here, users can get a quick overview of the day's district, local, and national headlines. *National Headlines* features a mix of headlines selected from Factiva—typically about Federal Reserve System banks, supplemented by general national news headlines. Links to *More District Headlines* and *More National Headlines* provide easy access to complete lists of the day's headlines.

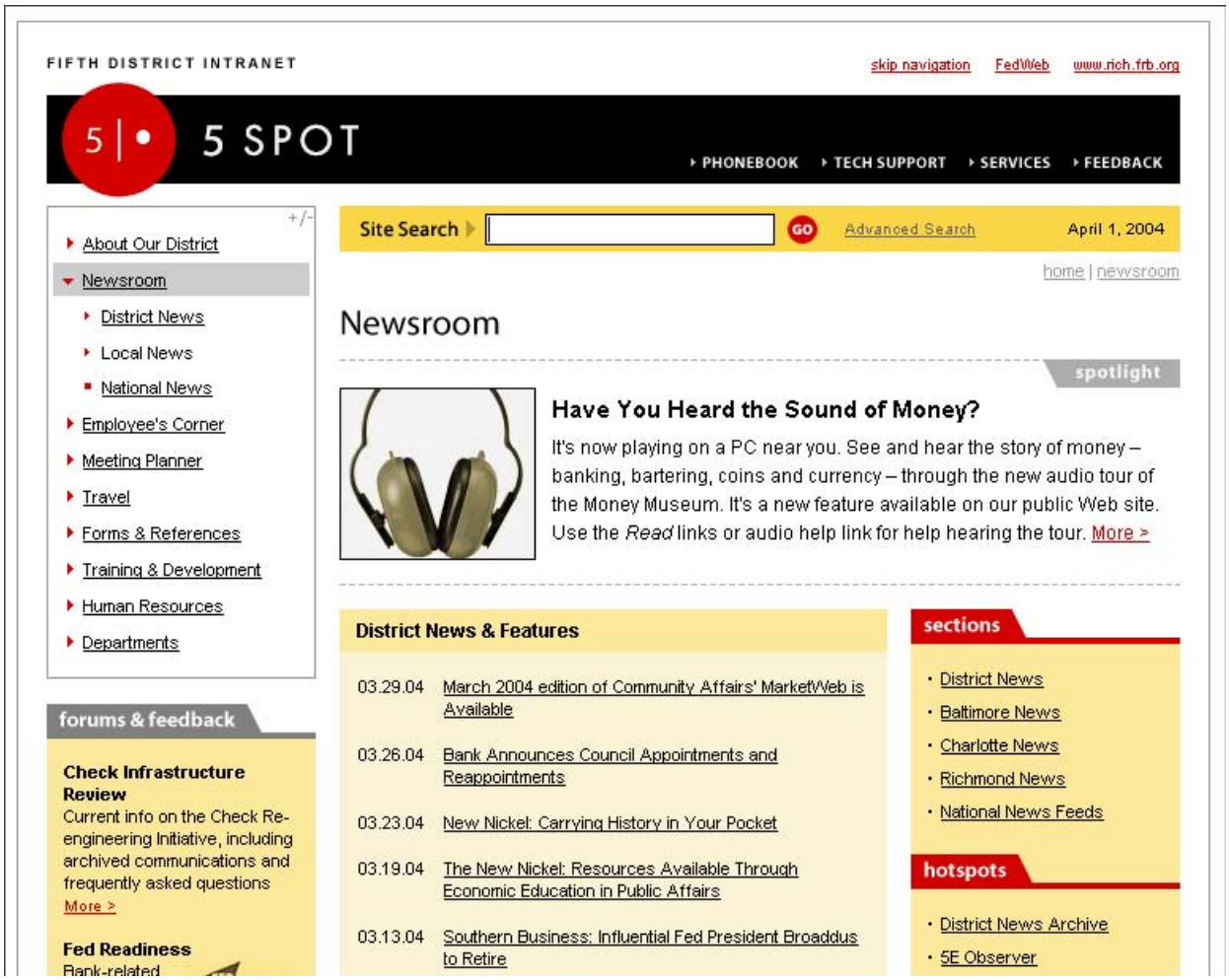
[8] Meaning of the Name: *Five spot* is a casual term for a five-dollar bill. The number five is significant because Richmond is the Fifth Federal Reserve District.

On the main news page, users also find links to news archives, internal publications, national headlines by subject, and 5Spot's topical "forum" sections. These sections feature content on topics that are highly important to the bank and of current interest to employees.

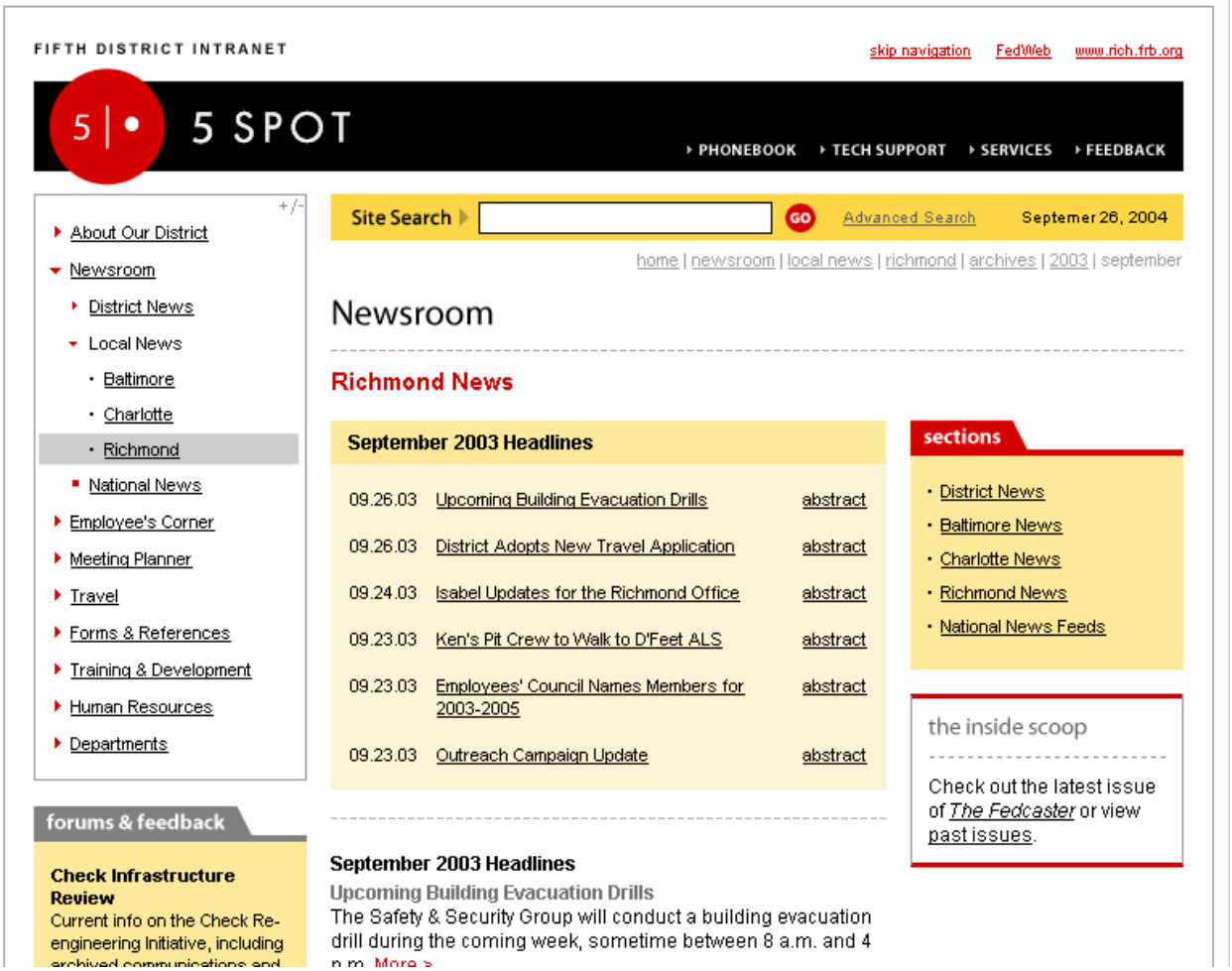


Pictured: The Federal Reserve of Richmond intranet homepage.

The main news page's *Spotlight* calls out the most interesting or important news items. In addition to dating the items and featuring clearly written headlines, this section offers links to local news items, which reinforces location.



Pictured: The main newsroom page is easy to scan and provides timely news.



Pictured: The local news pages display relevant news for Richmond, as this example shows.

As for traversing the site, persistent navigation makes this a breeze. Menus are organized by task and employ simple terminology. Designers focused on making menus easy to use, because research revealed that users had difficulty locating information and performing tasks on the previous intranet.

In the new menus, top-level choices expand for more selections, which keeps the top-level list short. Unlike cascading pull-down menus, 5Spot's expanding menus do not pop-up over the content area and interfere with users' view of the current page. Users can also take advantage of the small plus and minus signs at the top of menus. These signs let users expand or collapse the entire menu with a single click. The red arrows to the left of the menu choices indicate subsections.

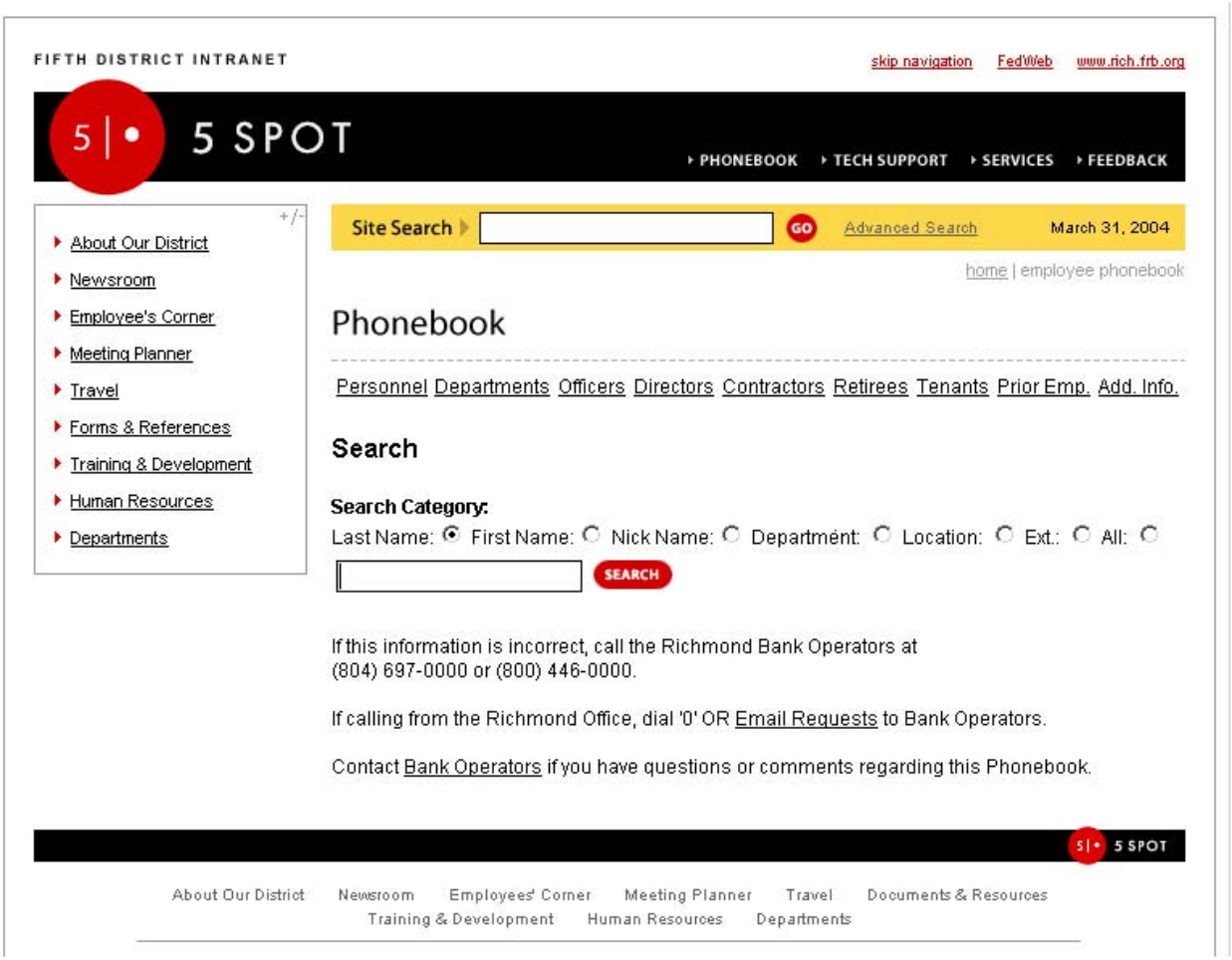
Breadcrumbs combine with a gray-highlight bar in the left-hand navigation to show the current page's location in the site structure. The black heading at the top of each page also names the main section, and beneath that, a red heading shows the subsection. Third-level subsections are indicated with a smaller black heading below the red subhead.

The top, horizontal navigation—which the designers call *utility navigation*—appears in the black bar at the top of every page. The designers carefully selected this section's links to

include the most frequently used content and functionality, such as links to the employee directory (the *Phonebook*), technical support, services, and the feedback form.

In the *Phonebook*, employees can search by first name, last name, nickname, department, location, or extension. This helps users find people, even with minimal information. Users can also select from links to other *Phonebook* views: alphabetical by department; lists of directors, officers, retirees, building tenants, and prior employees; and a list of contractors by department.

On the search page, users see a phone number to call if their own contact information is incorrect.

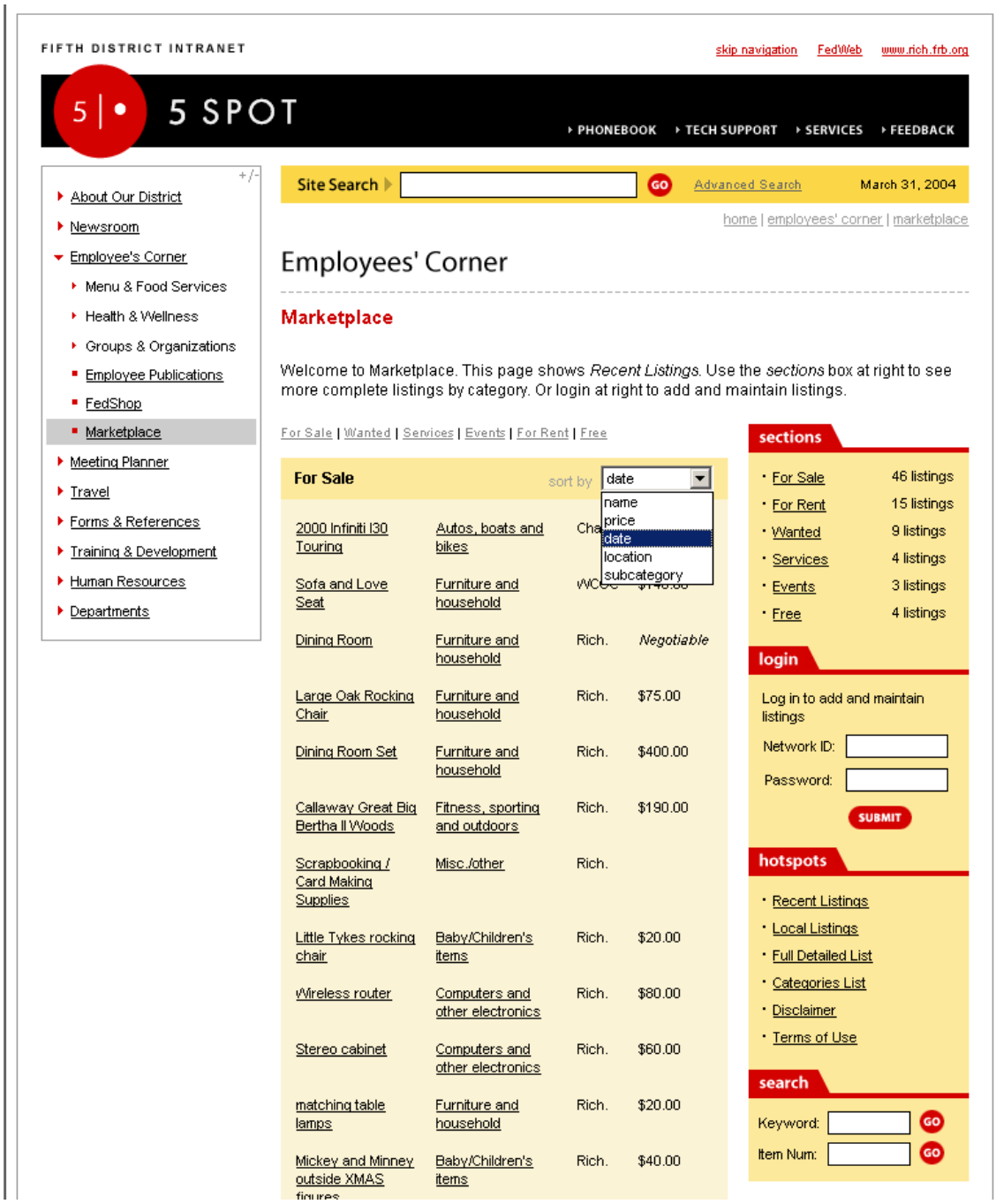


Pictured: The *Phonebook* page, where users can search for a person using many different criteria.

Even with the intranet's simple navigation, some users will prefer to search. Thus, an open field is available in the top-center area of every page. For those who want to construct more complex searches, they can click the *Advanced Search* link, leading to a page that lets them enter Boolean searches without having to know the Boolean syntax.

The intranet designers and organization managers realize that quality-of-life satisfaction can increase job satisfaction. Thus, the intranet offers more personal features in the *Employees' Corner,* which is for and about employees—not the bank. The online employee marketplace is one very popular tool there that lets employees advertise items and services. This

feature-rich application gives employees a range of options for managing their own listings, but also makes it possible for busy employees (and those less comfortable with technology) to create maintenance-free listings by completing a simple form. These listings expire after thirty days, so no maintenance is necessary.



Pictured: Users can buy and sell personal items using the *Marketplace* area of the intranet.

There are many other features in the *Employees' Corner,* including cafeteria menus; gym hours; fitness class schedules; information about health and wellness topics; information

about the employee Health Center; employee service anniversaries; online scheduling for massage therapy; FedShop, where employees can purchase Fed logo merchandise and other personal items; and information security tips for employees' home networks and PCs.

The bank understands that while such features help draw users to the intranet, content and tools that help them work efficiently will keep them coming back.

URL AND ACCESS

The intranet's URL is http://5spot. Users have a 5Spot icon on their desktop, and the Windows start menu includes a link to the URL. However, if users simply boot their browser, the first page they see is one level higher: the Federal Reserve System's intranet homepage, which is a gateway to all Federal Reserve intranets including 5Spot. (Users can change their browser's start page.)

Mobile users with VPN accounts can connect to the LAN, then access 5Spot.

CONTENT MANAGEMENT

The Federal Reserve Bank of Richmond uses Interwoven's TeamSite, introduced in August 2003 as part of an intranet redesign.

The 120 content providers use one of twenty templates—built in-house using designs from Ironworks Consulting—and have a list of which templates to use for a particular kind of content. There are two style guides, which cover writing and design. "We've also distributed a copy of the sitemap, labeled to show which template should be used in each area of the site," says Trisha Meade, 5Spot*'s* lead content editor.

TeamSite routes submitted content to a department or group manager for subject-matter sign-off. From there, the corporate communications department reviews and edits the material for adherence to style guides, then publishes it. Corporate communications also contributes all corporate- and district-level content. This distributed content-authoring approach is a legacy of the previous intranet's organic growth.

TECHNOLOGY

Interwoven's TeamSite handles content management. The Web server is Sun's iPlanet. Code editors and development tools include Macromedia Dreamweaver MX, Macromedia Homesite+, UltraEdit32, TextPad, GNU Emacs, and WebSphere Studio Application Developer. Adobe Photoshop, CorelDraw, and The Gimp handle graphics. Application servers are Macromedia ColdFusion and IBM WebSphere. For prototyping, the intranet team uses Microsoft Access; Microsoft SQL Server runs on the live intranet. ColdFusion's Verity software handles intranet searching.

GOALS AND CONSTRAINTS

1) Give the Federal Reserve Bank of Richmond's employees easy access to timely and credible information that they need or want. 2) Enable knowledge sharing and collaboration. 3) Automate processes to increase efficiency and reduce costs. 4) Provide a channel for multi-way communications across all bank levels, departments, and locations.

BASIC INTRANET FEATURES

Basic features include:

- Departmental news, key contacts, mission statements, services lists, FAQs, and organizational charts.
- Centralized access to all forms, manuals, and policy and procedural documents, plus the bank's online library.
- News from the entire Federal Reserve System, its Fifth District, and major news outlets.
- Capabilities for reserving meeting rooms, visitors, catering, and audio/visual equipment.
- Access to travel policies and forms, fleet-vehicle reservations, and offsite travel resources.
- A searchable phone directory.
- "Soft news" and services, including internal group and organization homepages, menus, gym hours, and amenities information. Users can buy and sell goods at an online marketplace. Fedshop sells Federal Reserve-branded merchandise.
- Centralized support information to reduce e-mails and phone calls to the help desk.

USERS

The intranet supports 1,500 users in Baltimore; Charleston, W. Va.; Charlotte; Columbia, S.C.; and Richmond. Also, the bank plans to introduce kiosks to serve employees who don't have PCs.

USER TASKS

- Access national, system, district, and local news, and view news archives
- Find forms, policies, procedures, and manuals based on a variety of parameters, including department, topic, need, and form name
- Plan meetings and register outside guests
- Access the employee phonebook, key contacts, or technical support information
- Review cafeteria menus and check the weather at any location
- Access HR information, and view HR and IT training schedules
- Learn more about the Federal Reserve System, the Federal Reserve Bank of Richmond, and all fifth-district locations
- Access resources available through the bank's research library
- View archives of news and employee publications
- Buy and sell items in the online employee marketplace
- Access travel applications and information from a central location

BACKGROUND

The Federal Reserve of Richmond's intranet launched in July 1996, after the Federal Reserve's Board of Governors commissioned an intranet and invited the twelve district banks to join. As each joined, it built its own site; no common guidelines existed. That ethos

applied within the banks as well—departments created their own intranet sections with no oversight.

"Not surprisingly, this approach led to a series of sites connected by entry pages, but little else. Users had to become familiar with each department or group site's different architecture and design, and global navigation was not available outside the main page," notes Chip Trout, an information architect for Ironworks Consulting. Many departments also operated without understanding or applying usability principles.

The old site featured contributions from more than 100 people, each of whom had their own take on design, architecture, and content. This made maintaining a consistent-looking site almost impossible. The new site's unified design and architecture, and an added editorial review (before content is sent to production), help create a much more consistent-looking site. Some content creators, however, didn't exactly embrace the change.

"On the old site, departments and groups weren't required to submit content for review by an editorial group. So, they were apprehensive, understandably, about that new review—especially since corporate communications could edit and publish their content without sending it [back] for further review," says Kendall Meddows, who manages the intranet's editorial team. Editors addressed this resistance by training content providers to work within the new site's structure and standards to achieve business goals. They also worked closely with content providers to build and maintain trust.

DESIGN PROCESS AND USABILITY ACTIVITIES

The redesign team included content area representatives, and staff from IT, the research library, Web development, and public affairs.

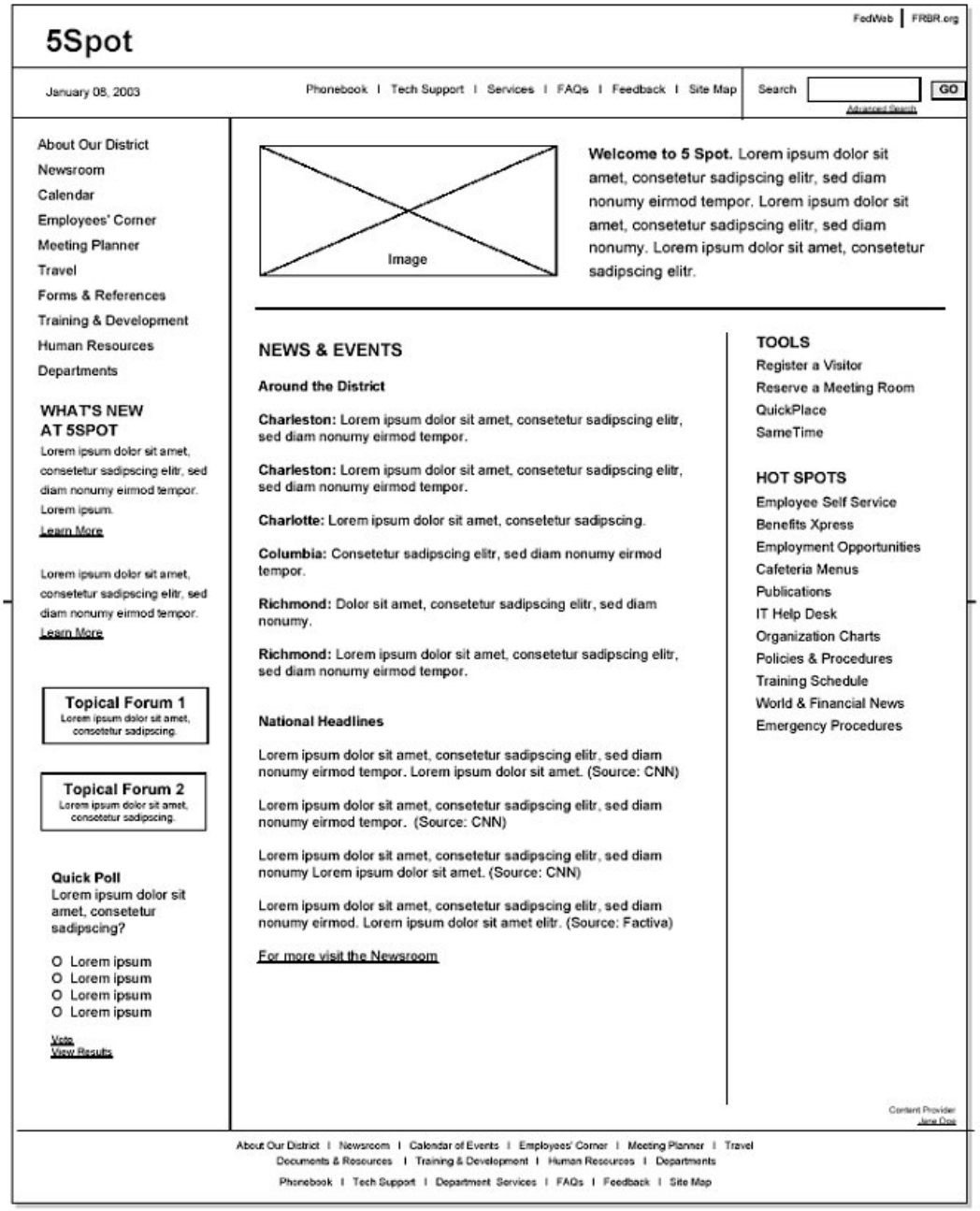
The team's redesign goals were to improve the site's information architecture, better focus the site on needs of users in every district location, standardize site navigation and design, and implement a CMS.

First, the redesign team hired consultants to conduct an expert review and ascertain users' needs. This group surveyed a randomly selected group of intranet users and non-users from every location. A subset of that group participated in group discussions about users' needs.

"We learned what we already knew from our site-usage reports: employees used the intranet mostly to check cafeteria menus, review organizational charts, register guests, and reserve meeting rooms. Users told us that the inconsistencies across the site made information so difficult to find that it was quicker to pick up the phone and call someone for answers," says Meddows.

To improve the site, users wanted an intuitive structure. They don't have time to dig for information or determine the fastest available channel to complete tasks. Users in locations outside Richmond also didn't feel the intranet represented them. Others, because of their job function, didn't have access to either computers or 5Spot. Future projects will rollout kiosks for those employees.

To collect feedback about the new architecture and labels, the consultants created an online survey.



Pictured: A wire-frame version of the homepage, which was tested during development.

However, the test did encourage the team to add more routes to existing information. "For example, if a user wants to set up an online meeting, he might expect to find that in the *Meeting Planner* section, as well as under *Forms and References*. So we decided where content would live and then, based on the test results, put links in other areas where users had told us they would look for it," says Trout.

The redesigned information architecture freed information from departmental silos, placing things where users expected. Parking information, for example, isn't just located in the Building and Equipment Department's section—it's also grouped with directions on each office's *About* page, next to weather, local information, and restaurant links. Parking-related services information is also available via the *Services* link at the top of every page.

The team faced some surprise delays. For example, creating content-provider training and documentation took a long time. The reason is that project team members had little professional training experience, and the tight schedule didn't allow time for the in-house IT training group to learn the content management tool and specifics of the bank's implementation, then develop new curriculum before the launch. Other parts of the project that took longer than expected included: testing and refining the CMS's templates, redesigning existing applications to fit the new 5Spot look, and creating new content.

Regardless of obstacles, the project's deadline loomed. "The only area in which we had flexibility was scope. So, to make up for delays, we launched the site with about 70% of the planned content, and scheduled most new functionality for future phases," says Meddows.

TIMELINE

- October 2002: Current and proposed content analyzed. User survey developed and released.
- November 2002: Conducted user group discussions. Created user profiles.
- December 2002: Started information architecture design. Developed a functions and features list and a site map.
- January 2003: Developed screen layouts. Started work on label testing, wire-frame testing, and analysis. Finalized homepage and template designs. Started training plan.
- February 2003: Wrote style guides. Began modifying existing applications to fit the new 5Spot look and feel, and started creating the technical environment.
- March 2003: New tool development began on the meeting planner, QuickPoll, and weather-information feed.
- May 2003: Completed design and QuickPoll tool development.
- June 2003: Began testing applications.
- July 2003: Began creating new content for launch. Completed application-development work.
- August 2003: Completed content creation and editing. Conducted final testing. 5Spot launched.

RESULTS

The redesigned intranet improves information location, employs a CMS with better publishing workflow capability, and adds features to improve employees' productivity. Whereas the previous site lacked news, for example, employees can now access national, district, and local news, updated daily, on the intranet.

The new site is also more inclusive, with content creators at different offices contributing location-specific news. "Users told us that the previous site was Richmond-centric, with few benefits for users outside Richmond. Now users in every location can find information

about—and of relevance to—them," says Lisa Oliva, assistant vice president of corporate communications and the redesign project's business owner.

Bespeaking the site's improved usability, the average-monthly page views increased from 280,000 to 800,000 after the redesign, and the number of unique visitors rose from 3,000 to 4,800.

The new site includes many more forms and reference documents, and improved departmental and group-services information. "Thanks to a new roll-up application, all of these items are available from multiple places on the site, including global lists, which users can sort using a variety of parameters, including department, subject, need, name, and number," says Ann Tindall, project manager for the redesign's technology.



Pictured: The services roll-up application, accessible via a link from any intranet page, lets users sort departmental and group services by title, department, or subject.

The previous intranet's information architecture was organized by department, and users had to jump from section to section to complete basic tasks. By contrast, the redesigned site groups similar elements to speed task completion and links to those elements from multiple sections.

Some Federal Reserve Bank of Richmond print publications are almost exclusively online now, resulting in printing-related savings, including fewer software licenses and reduced training for designers.

Take *Fedcaster*, a weekly newsletter read by over 2,000 current and former employees. "We've built a 5Spot template for this newsletter so that everyone who's trained in TeamSite can produce this weekly publication," says Oliva. Moving *Fedcaster's* marketplace online reduced printing costs and time spent editing employees' advertisements. Employees now list their own items for sale online. "Sometimes these ads alone would require as many as three print pages. When you add the time to edit these advertisements—done by corporate communications—to the printing and distribution costs, including postage, for more than 2,000 readers, the marketplace was costly," notes Oliva. Now that users have a tool for listing goods online and corporate communications no longer reviews advertisements, there are no additional print or resource costs associated with extra-long advertisements, images, or running for-sale items for extended periods of time.

Likewise, the Charlotte location's weekly employee newsletter, *Southern Accent*, was previously a print-only publication and is now a popular intranet fixture, with similar results.

The intranet-based room-reservation system, popular on the previous site, also benefited from the intranet redesign. "Since the reservation system has been on 5Spot, we've definitely received fewer calls asking for directions [about how] to access the system," says Chris Brooks, content provider for the bank's Building and Equipment Department. "5Spot has made it easier for our customers to interact with us."

Despite the improvements, the redesign team faced obstacles, some of which persist. Templates, for example, were no silver bullet. "We were surprised by how difficult it is to achieve design consistency using templates," says Meddows. Just creating templates doesn't ensure consistent presentation. "When we first tested the templates, before training content providers on them, we found that the templates would have to be extremely restrictive to force true design consistency." Yet that would mean many more templates and increased time to maintain them. Instead, the Federal Reserve Bank of Richmond chose another approach: keep templates flexible and educate users to use them consistently.

One way to assist users is through field descriptions—boxes at the top of each template that give instructions. These descriptions change as the content creator navigates from template field to field. Still, authors interpret these descriptions in many different ways, necessitating continued refinement via usability studies, plus ongoing training and dialog.

Of course, change takes time. "We're still struggling to overcome ingrained preferences for broadcast e-mail as a primary channel for announcing internal news," notes Meade.

LESSONS LEARNED

Insights from Sandy Tormoen:

Intranet development is different. "We tried to apply application-building processes to intranet development, but this project was too complex. Analyzing issues from afar didn't work either. You have to just get your feet wet and go."

Insights from Kendall Meddows:

Watch contributors' numbers. "Balance the publishing power of more contributors with the lower cost of involving fewer people. Don't underestimate large-group-management challenges either, such as relationship maintenance, communication, support, and training."

Resist compromise. "True, trying to build the perfect site means you'll never launch, but project time is gold. In our case, dedicated intranet employees split time between ongoing maintenance and building future features post-launch. Things that take months in project mode take much longer in maintenance mode."

Know your content's limits. "Don't just count on content to draw users. Build applications they love to use; make difficult tasks easy. Get users hooked, and then you can feed them news and other information."

Insights from Trisha Meade:

Nurture relationships: "To make the intranet the source for all news and critical information, make time to help your organization's leaders understand that your channel is the best one for achieving their business needs."

Insights from Lisa Oliva:

Ready your cheerleaders. "Get support from senior management and other opinion leaders. You're going to need cheerleaders; start with ones your audience already respects."

Early usability studies speed later decision-making. "User research and other usability work pays off. We were able to complete project parts in a relatively short time because we had sound data to make decisions."

Banco Español de Crédito (Banesto)

Using the Intranet:
Madrid-based Banco Español de Crédito S.A. (Banesto), a financial entity founded in 1902, is Spain's third largest bank by volume of managed resources. By virtue of its revenues — 2003 pre-tax profits of more than €640 million ($689 million) — it's quoted on the primary Spanish stock market. The bank has 9,840 employees, 1,600 branches in Spain, and serves more than 3 million customers. The bank focuses on services for small-to-medium enterprises, corporations, and the retail banking market.

Banesto is part of the Grupo Santander Central Hispano (SCH), which is Spain's largest banking group and the largest banking group in the Euro-currency zone.

Design Team:

In-house

Members:

Pablo Sánchez, head of Banesto's usability and user interface design department; Ángel Laguna, creative director; Sergio Cabrera, art director; Ricardo Salazar, interactive designer; Danny Poves, usability consultant; María José Téllez, information architect; David Gil-Esteban, information architect; Pilar Ónega, usability consultant; Luis García, human-computer interface consultant

SUMMARY

Good planning and research were the first things intranet designers did right at the Spanish bank Español de Crédito (Banesto). Defining specific redesign goals, identifying the existing intranet's problems, and assembling a top-notch usability team made a world of difference for this intranet design.

Wanting to create a completely new design, many intranet and Web designers ignore the existing design. This is a mistake, and one Banesto avoided. You can always learn from the existing design, and then use it as a prototype for your new design.

So, what was there to learn from? In the first version of the Banesto intranet, navigation was arranged according to the bank's departmental structure. At organizations with only a few clearly defined business units and functions, a department-based intranet structure can be effective. Banesto's organizational structure, however, is too complex for this approach; the bank has many different business units, including personal banking, private banking, corporate and institutional banking, financing for small and medium enterprises, agricultural banking, and more. As is true of many departmentally organized intranets, Banesto's original design wasn't scalable, encouraged information duplication, and required untoward maintenance. From the user's perspective, it was difficult to find information. The main challenge for Banesto designers was to find a new, easy-to-use organization for the existing content.

The redesigned Banesto intranet homepage — which automatically launches in users' browsers when they turn on their PCs — is elegant and practical. As is apparent on the homepage and all other pages, designers clearly understand the tools and systems users require. The pages are conservatively designed, which helps maintain fast download speeds. Designers also created an intranet that takes full advantage of the fact that all Banesto employees use company-standard monitors that support a 1024 x 768 screen resolution.

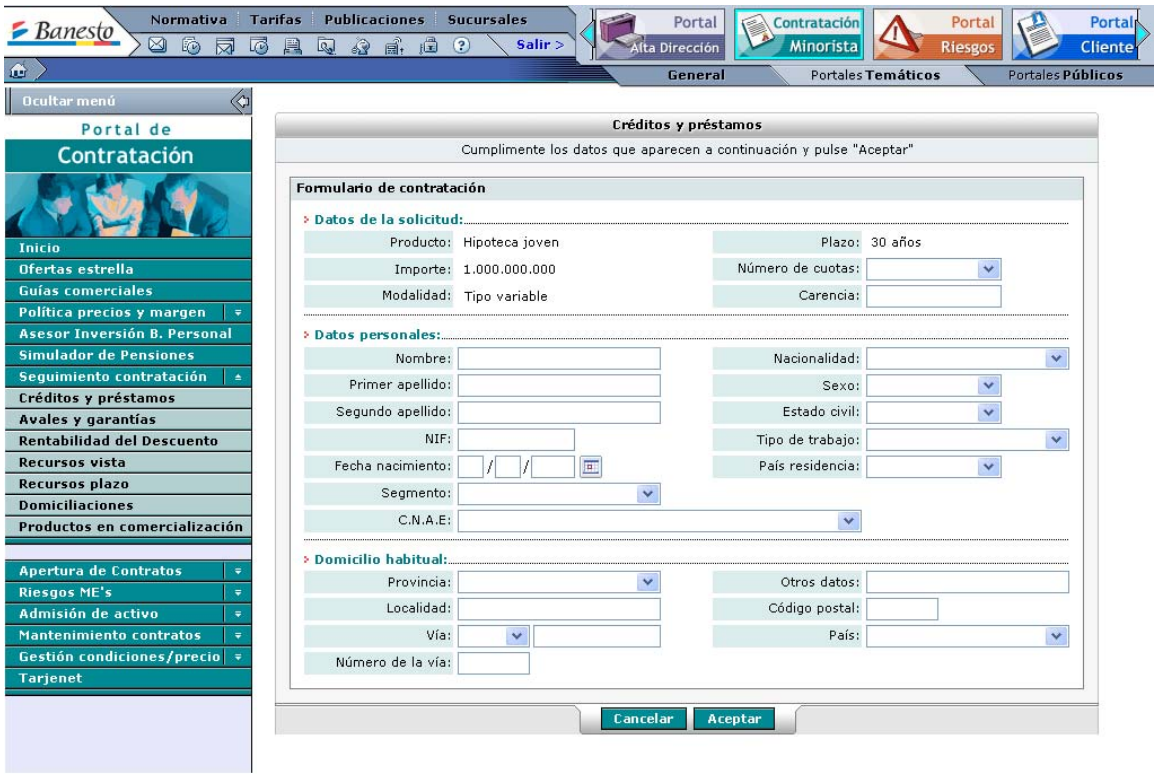


Pictured: The Banesto intranet homepage, which automatically launches when users turn on their PCs. Designers struck a balance between design elegance and practical download speed. All bank employees have monitors that support a 1024 x 768 screen size, which designers used to full advantage.

The intranet redesign team had to allow for a broad range of user roles, each with varying professional needs. Research showed that each business unit needed its own set of portals, with each portal having a unique group of banking applications, financial tools, business reports, directives, and banking-sector news.

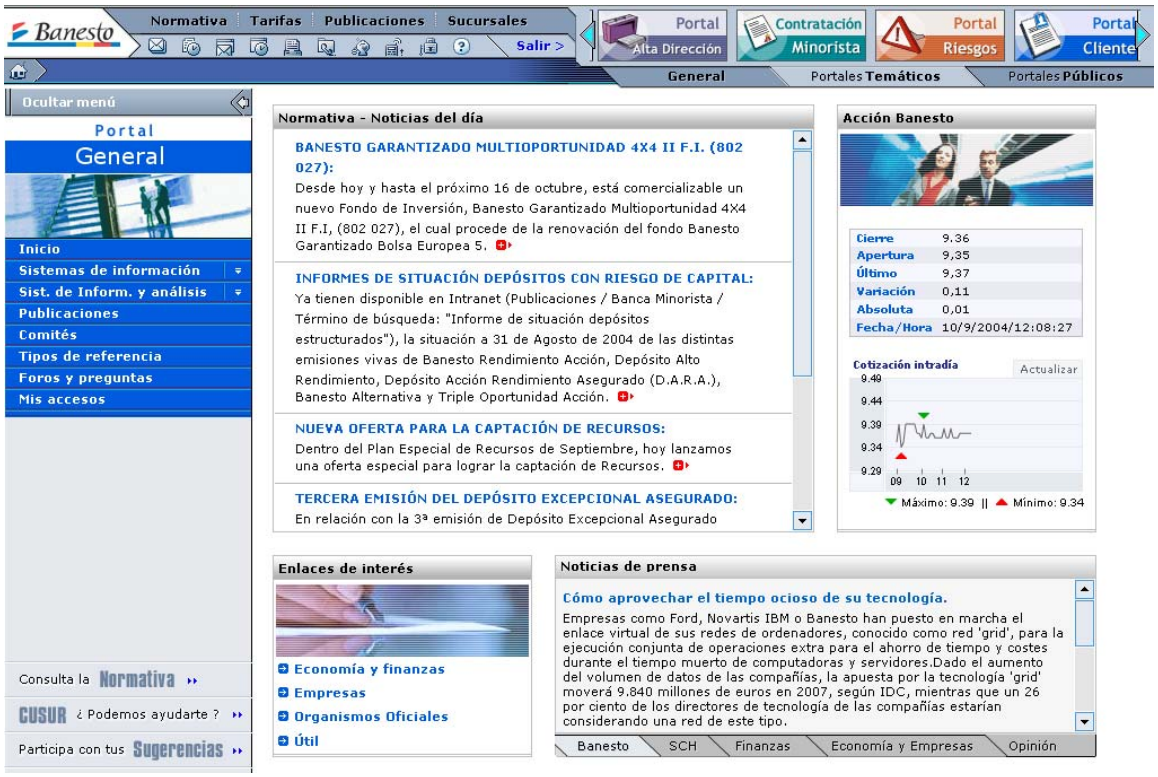
Throughout the intranet, designers maintain a subdued color scheme, using color to draw attention or call out sections. They delineate various portals across the intranet using specific colors, which are reflected in the menu and various user interface elements. This subconsciously reminds users of exactly where they are in the vast Banesto intranet.

In addition to the customized portals, the intranet also saves Banesto's nearly 10,000 employees time by making forms quick and easy to fill out. All Banesto intranet forms have a clean layout, headlines for specific sections, and clear and concise names for all field labels. Form fields are also automatically filled in, to the extent possible, based on a user's login and previous selections.



Pictured: Clean, straightforward, and well structured, Banesto's data-entry forms are specially designed so users can fill them out quickly. Note the intelligent use of color here: the color of this particular portal (green) is reflected in the form labels, page background, menu, and various other user interface elements.

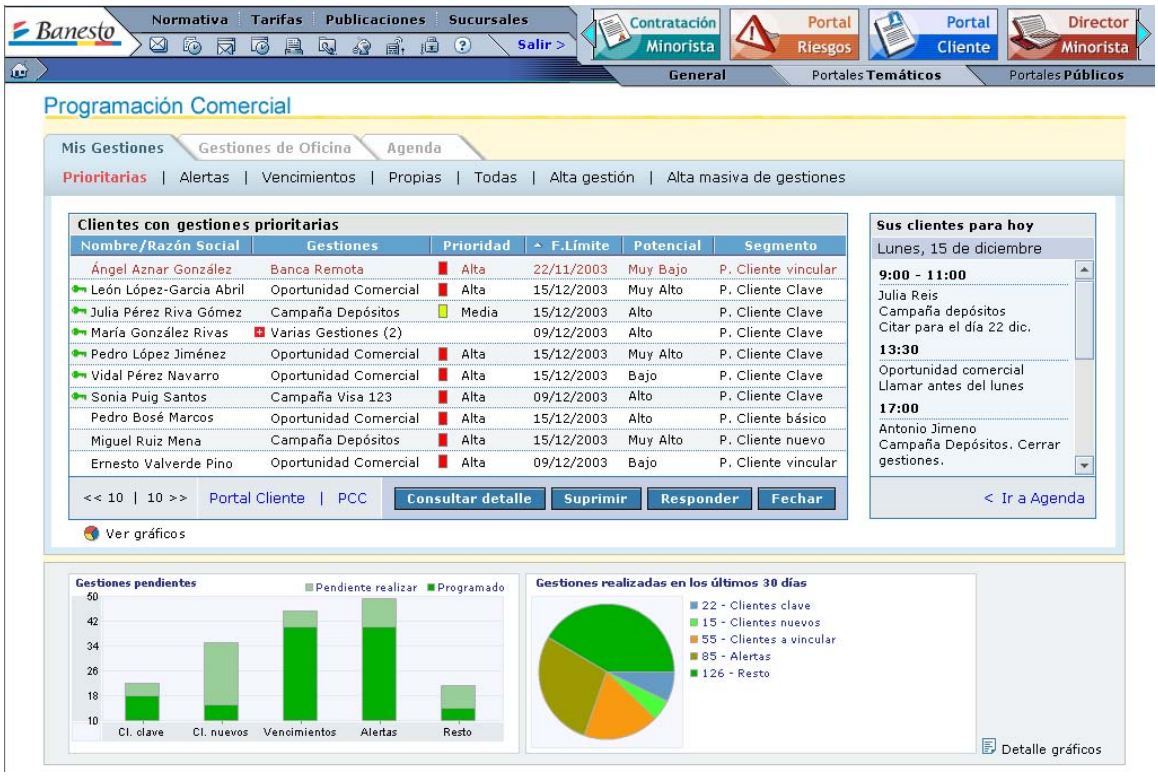
Consistent navigation helps users traverse Banesto's many portals. The top-most navigation bar also leads to the different portals users can access with their specific privileges. The selected portal's menu then appears in the left-side vertical-navigation bar.



Pictured: Homepage portals offer a range of options tied to a user's business duties, such as generating business reports and visiting relevant forums.

Banesto's business reports allow users to easily analyze, explore, interact with, and understand large amounts of stored information. The various reporting tools, including the *Business Agenda* feature, enable quick drill-down and, for example, help the sales force understand and meet sales goals. Another important feature facilitates client data management. Consolidated lists and trouble-free chart-generation tools add to ease of use.

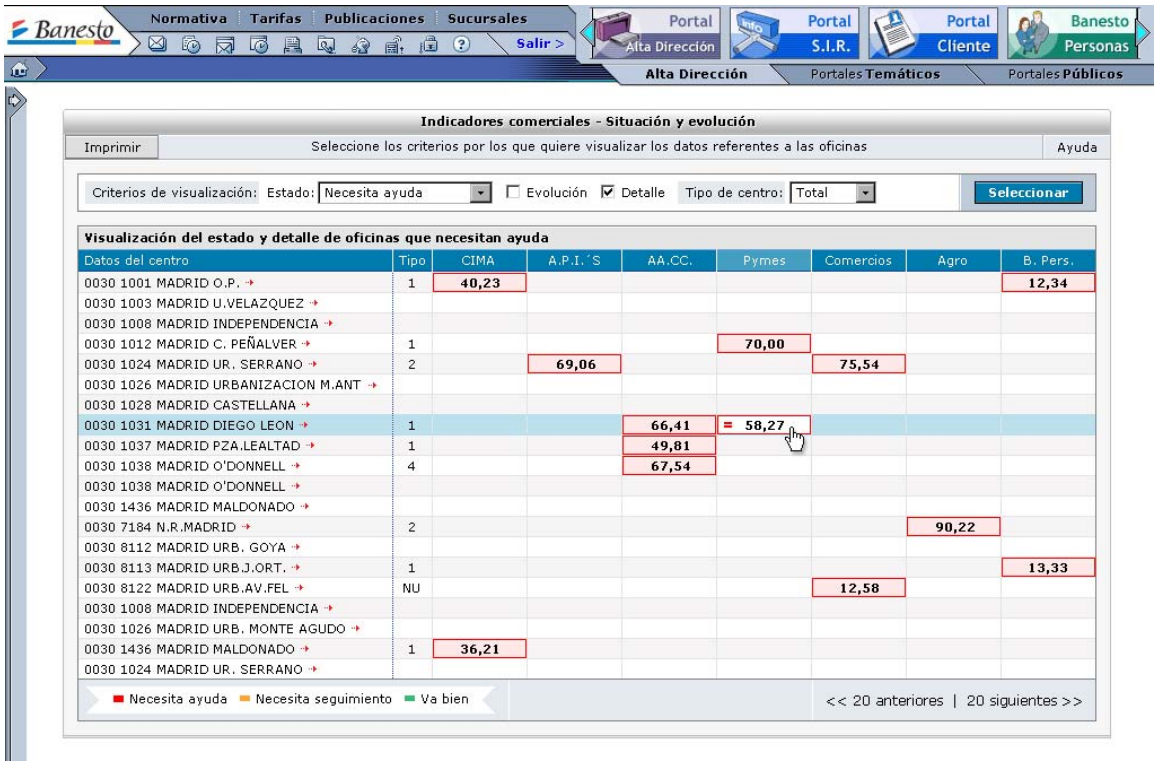
Although numerous off-the-shelf software applications offer similar business reporting capabilities, integrating them can make consistent intranet design impossible. Banesto found this to be the case, so its designers created their own. The end result is an excellent user experience.



Pictured: The *Agenda* tool makes it easy for salespeople to track client information and meet sales goals.

For the redesign, the bank's top executives required that the intranet include reports that clearly distinguish and highlight — in a single view — the real-time status and situation of each Banesto branch.

Once again, the use of color, combined with the intelligent use of user interface elements, creates a successful design that's popular with end users. At a glance, managers can assess the basic state of the bank or a branch, letting them evaluate performance and make vital decisions more quickly. In essence, they see just the surface of a very complex banking application — and that's the point.



Pictured: One of the business reporting tools displays high-level status information for each bank branch. Senior management required this at-a-glance feature.

Of course, just building a new intranet with excellent productivity tools and a usable design doesn't guarantee its success. Here, support from upper management can make a tremendous difference, enabling changes in corporate culture and encouraging employees to use the intranet.

Here's one example of how senior managers can help: Instead of the annual conference call, Banesto's president conducted the company's annual employee meeting — which highlights goals for the upcoming year — via the intranet. Note the professional picture of her gracing the relevant page: she's confident, yet approachable. On a design-use note, with this type of image, it's imperative to include a name and title next to the picture. In general, we see too many upper-management messages on intranets that include only the executive's picture, devoid of name or title. This is a mistake, because employees — especially new employees — may not be familiar with a senior manager's face.

At Banesto, the president's messages are posted in an engaging, multimedia format, including video streaming. From this same page, users can interact with the president during the annual meeting, directly answering questions or making suggestions for improvements.



Pictured: The president's message keeps employees informed of the company's annual goals, via an engaging design and multimedia presentation.

Creating a sound, well-researched information architecture and applying consistent usability standards helps create an intranet useful for all Banesto employees. The Banesto intranet team's innovative use of design, homegrown applications, and management buy-in all combine to meet the redesign team's primary goals of improving employees' efficiency and increasing the standard internal communication.

URL AND ACCESS

The Banesto intranet's address is http://portal.intranet.banesto.es. The intranet is the default homepage for all employee browsers, which launch automatically when they turn on their PCs. The intranet then authenticates users and automatically restricts their intranet view to the appropriate parts, filtered by job type.

Many employees — including managers, external collaborators, executives, and the sales force — can access the intranet remotely from their laptops using Banesto-provided General Packet Radio Service (GPRS) cards, WiFi, or DSL connectivity.

CONTENT MANAGEMENT

Banesto uses Fatwire (formerly Open Market) Content Server version 5.5, customized to meet its needs. One feature Banesto added, for example, is the ability to flag urgent content to prioritize its editing.

Content creators must use templates, which the usability department maintains. Interestingly, templates are not "portlets" — small applications fitting into predefined sections of the page — but rather a three-by-three grid, which users can customize with various types of content or applications.

TECHNOLOGY

Banesto's own data processing center hosts the intranet's secure servers. Middleware and back-end software running the intranet include Microsoft Internet Information Server, Windows 2000, Sun Solaris, and IBM WebSphere.

For designing and maintaining the intranet, Banesto's information architecture and usability tools include Microsoft Visio 2000, Office 2003, and Project 2003. For Web design, Banesto uses Adobe Photoshop and Illustrator, plus Macromedia Flash MX and ACDSee. Software-development tools include Macromedia Dreamweaver UltraDev, IBM's WebSphere Studio v5.1.2 and Eclipse, and the Microsoft .NET development platform.

Intranet search is handled by technology from Altavista, though Banesto is transitioning to Autonomy technology. For bug tracking, Banesto uses software it developed in-house, called bGrid Monitoring Architecture.

The intranet also offers business software used at Banesto, including Business Objects, Staffware, Savvion, Siebel, and PeopleSoft.

Most Banesto PCs run Windows 2000, though the company is upgrading to Windows XP. Some employees also use Unix.

GOALS AND CONSTRAINTS

Goals:

- Create a common platform for all employees, regardless of their job descriptions.
- Move all employees from host-based PC applications to an intranet-based application environment.
- Reduce costs by furthering a less-paper policy.
- Enhance corporate communications.
- Institute a knowledge-management program.

Constraints:

- Managing senior managements' expectations and deadlines.
- Enticing Banesto's employees — who are mostly over forty and not very technology savvy — to move from a host-based to a Web-based environment.
- Designing usable yet lean pages, interfaces, and navigation, as many bank branches' connectivity consisted of 45KB-per-second modem connections.

BASIC INTRANET FEATURES

Banesto's employees have a one-stop shop for their computing needs: the Banesto intranet. The intranet creates a single access point for — and a consistent interface to — any of the portals, intranet tools, or business applications a user needs, whether it's reading corporate news, mining data using Business Objects, or checking e-mail in Lotus Notes.

Beyond the built-in capabilities of those business applications, Banesto employees can use the intranet to access sixty different banking applications, often via intranet portals personalized for their specific job description (such as a branch manager or cashier). The portals gather the tools and news users regularly need, minimizing click-throughs to reach the content. For example, customer-service representatives' workflow is accessible via a link on their portal homepage, allowing them to quickly walk a customer through a problem-diagnosis script. If that fails, the final intranet screen gathers the needed information, and then automatically creates a trouble ticket for follow-up.

Another often-used feature is the online catalog of bank offerings, which everyone from a salesperson to branch manager can use when a customer wants to buy or change a service. The catalog contains essential information about the product, plus the means to complete the transaction.

For employees themselves, an extensive self-service area lets users check their pay stubs, check tax withholding, and even make bank-matched charitable contributions. An online learning portal help employees plan their career path and follow through via online training.

USERS

Users work in Banesto's Madrid-based headquarters or in one of 1,600 branch banks located throughout Spain.

The average user is "40.85 years old," says Pablo Sánchez, head of head of Banesto's usability and user interface design department, and user testing found that they were "not so well-versed in modern technologies."

Users typically work for one of the bank's business units, which are based on banking services offered and include retail (individual), business, small-to-medium enterprise, corporate and institutional, and agricultural banking.

Typical job titles include cashier, customer-service representative, market analyst, risk and insurance specialist, salesperson, business analyst, branch manager, and senior executive.

USER TASKS

- Carry out banking transactions for clients
- Refer to client records
- Sell finance and banking products
- Participate in online training
- Consult business intelligence reports, updated in real time
- Consult company news, including the latest products and campaigns, Banesto shares and stocks, internal memos, and corporate messages
- Report tasks accomplished and hours worked (required for all head-office employees)
- Read banking industry and economic news
- Consult employee regulations, including collective agreements, equal rights, codes of conduct, the company hiring process, and vacation policy

- Consult company regulations, from the posting of internal job openings and information regarding product campaigns to notification of withdrawal of obsolete advertising material
- Access the company directory
- Resolve customer incidents
- Collaborate via Lotus Notes Quickplace
- Check wages and tax-withholding information
- Post to the intranet forums
- Search the documents archive
- Use e-mail or instant messaging, or send SMS messages (up to 150 characters) to a cell phone
- Locate offices and branches
- Check Web-based agenda
- Recommend a Banesto employee or an external person for a job opening

BACKGROUND

In 2001, seeing the intranet foundering, Banesto's director of technology commissioned Cap Gemini Ernst & Young (now Capgemini) to conduct an in-depth usability review of Banesto's intranet.

The report was well received; in April 2002, the consultant who wrote it — Sánchez — was hired to head Banesto's in-house usability and interface design team. As Sánchez notes, Banesto is today "one of the few banking organizations in Spain with its own in-house usability department."

After the usability team was assembled, "the first steps we took were to draft a much-needed collection of usability and design directives," says Sánchez.

The team also brought the bank's software developers in to help build new intranet prototypes. Collaborations of this type occurred throughout the start-up and later redesign efforts.

In fact, the intranet redesign itself was part of the Banesto board of director's broader four-year strategy to improve overall technology practices. The strategy's goals were to acquire and adopt leading-edge software products, such as applications from PeopleSoft and Siebel, and the Microsoft .Net platform; to increase bandwidth to every branch and office, most of which had an RDSI (ISDN) connection that was slower than a 45KB-per-second modem; and to modernize all employees' PCs. "With this sound technological base, the goal was to make the intranet the one and only work tool for all employees, regardless of their position," says Sánchez. "Ultimately, both Banesto's cashiers and CEO would use Internet Explorer to do their jobs."

In the spring of 2003, the now-larger redesign group began actively redesigning the intranet, with noticeable improvements. By the spring of 2004, nine employees, including information architects, interactive and graphic designers, and usability consultants, were working full-time in the department, addressing the bank's portals and applications, as well as features such as the business-intelligence reports.

A steering team continues to hold regular meetings and make all major intranet decisions. That team is composed of the usability and user interface department, the systems architecture department, and the group developing finance and banking portals.

To develop the intranet, the steering group and related employees work with in-house technology architects, systems analysts, and quality-control consultants from the company's technology architecture department.

Most programming at Banesto is delegated to external software-development firms; the intranet's prototype and production programming are no exception. These external firms must rely heavily upon the Banesto usability department's intranet user interface standards and style guides.

DESIGN PROCESS AND USABILITY ACTIVITIES

For redesigning the intranet, "the main challenge was how to organize the huge volume of content that exists in the bank," says Gil-Esteban, a Banesto information architect. "Unlike other banks that only have two business units (usually retail and business banking), [Banesto] also deals in personal banking, private banking, corporate and institutional banking, small-and-medium business financing, agricultural banking, and so on."

Beyond organizing this information, the resulting intranet "had to be sufficiently intuitive and uncomplicated," he says, since most employees are not very technically literate.

The problem with Banesto's existing intranet was that it largely reproduced the bank's organizational structure. "This rigid stance did not allow for much in the way of scalability," says Gil-Esteban, "and it also meant almost twice as much maintenance was needed" simply because of duplicated content. "Due to vested interests and internal divisions, content was never reused or shared." Last but not least, users couldn't find much of the existing content and functionality.

So, for the intranet redesign, the design team decided to abandon the old information architecture and introduce a reusable-portal model.

First, however, the team decided to study how the old intranet worked (and didn't work), so it began user testing and interviewing, and commissioned a heuristic study of the old intranet. The study found "a complicated navigation scheme, total lack of usability and design standards, no room for scalability, serious integration problems, and a clearly non-user-friendly interface," says Luis García, an HCI consultant. Those findings coincided with users' perceptions.



Pictured: The old Banesto intranet. Users complained about the complicated navigation and unfriendly user interface.

So, what needed to change from the old intranet to the new? Through user testing, the redesign team identified many discrete problems. For example, navigation was too complex to scale easily. “Navigation was limited to the use of either tabs or cascading menus, with no other alternatives,” says María José Téllez, a Banesto information architect, and yet the intranet was growing rapidly. “Soon the tab menus were obviously going to be piling up on top of each other.” To make matters worse, she says, the navigation was already “awkward and difficult, and it took forever to reach desired content.”

The intranet’s numerous design styles and user interface types also clashed; users were “frustrated and disoriented” by the inconsistencies, says Sergio Cabrera, Banesto’s art director. Also, because users typically regarded the intranet as a document repository, a lot of content was in PDF documents, yet the intranet had no software to index or search the content of PDF files.

Off-the-shelf business applications integrated into the intranet also created many usability problems. Each application looked different: upon launching, some would dominate the whole browser screen and eliminate the navigation, others would generate a completely separate browser window, and still others would move navigational elements to different parts of the screen. “Furthermore, these applications, which had to display a large amount of content, blatantly abused both the vertical and the horizontal scroll bars,” says Cabrera. A particular culprit in this respect, he says, was the default Business Objects interface.

The old intranet also featured a proliferation of pop-up windows, which are almost always disorienting for users. “When trying to read the latest economic news, for example, two or three new windows would open up to the user,” says Sánchez. In general, pages often bulged with images, making page-download times noticeably long, especially at the many branch offices still sharing a single DSL connection.

Rather than tackle each of these features in turn, however, the redesign team decided to first understand the intranet's users, to better meet their needs. So, the team began profiling users. Because the team worked at the bank, this profiling was relatively easy. "Having an in-house usability department meant that over time the usability consultant could understand more and more the intricacies of the bank and its employees," says Sánchez. "Information exchanged in the corridor, or casual chitchat at the coffee machine, can very often produce invaluable data."

Next, the redesign team benchmarked the best intranets in Spain. That was relatively easy since "the majority of them are run by our strategic business partners," says Sánchez. Intranets studied include those of IBM, Cisco, and Microsoft. While, overall, the process was useful, he says "this study didn't shed much light on the Banesto project, since the objectives of these other corporations were extremely different than Banesto's."

The intranets did spark ideas about usability guidelines, however. The main objectives of the bank's usability guidelines, says Sánchez, were to ensure ease-of-use and performance speed, make navigation consistent, ease learning, and improve integration and scalability. In all, there were thirty specific criteria for achieving these objectives. "These became the 'lingua franca' of the usability and GUI consultants the bank hired," he says. "Naturally, each consultant arrived with his or her own personal views, but having this consensus of opinion, and clear objectives, was critical for the success of the in-house usability department."

Next, the redesign team began designing new prototypes for the intranet. "We made many attempts which failed, but luckily none of these prototypes ended up in management's hands," says Sánchez.

One hurdle was picking technology to run the intranet. Microsoft SharePoint and WebSphere Server Portal made the shortlist. After the intranet team tallied pros and cons, however, it eventually threw them both out, meaning "freedom from the limiting 'portlet' concept," says Sánchez. "From this moment on, the usability department was free to think up new design concepts." This would ultimately lead to a more-modular design concept.

After the near-final prototype was created and user-tested, information architects made further tweaks as they finished inventory, categorization, and taxonomy work.

With the prototype coded, they had to make further changes based on stress- and performance-testing results. "We had to reduce the number of server calls, and therefore we had to limit images displayed in the interface," says Sánchez. Thankfully, he says, the changes were minor.

The first part of the new intranet to launch was the *Portal del director de Banca minorista* (the portal for retail banking directors). Before it launched, the redesign team did user testing to hone the final design. "There was an atmosphere of great expectation as everyone was anxious to see the results of the first user testing carried out on the branch managers," says Sánchez. Testing covered all tasks that end users were supposed to carry out on the intranet, and produced excellent results, he says. The portal homepage's combination of icons, search, business-data display, button order, and content were all apparently working. Still, "although the initial results were encouraging," he says, "it was also clear that users would still need time to get accustomed to the new intranet, no matter how well received it was during testing."

The usability team therefore took steps to ensure that all intranet features were well documented by launch time, from user help to revised usability guidelines. “This documentation was also going to be crucial for the hundreds of software developers — some of them outsourced developers — who work with the bank,” says Sánchez.

TIMELINE

- September 2000: The first intranet was launched, with a mix of HTML and Lotus Domino Web Profiling, giving employees access to their e-mail and Lotus Notes agendas
- May 2001: Launched first business portal with the company’s directives and communications from senior executives
- July 2001: Extended intranet access to Banesto branches and offices
- September 2001: Considered forming an in-house usability department following results of a commissioned intranet study
- October 2001: Adopted OpenMarket to manage content
- December 2001: Conducted user profiling and benchmarking studies
- February 2002: Implemented usability and IA solutions in the first two transactional application prototypes (“SAME” and “Propuestas”)
- April 2002: Created an in-house usability and interface design department
- July 2002: Outlined new intranet redesign for senior management
- Spring 2003: Launched intranet redesign
- March 2003: Deployed new intranet for “banca minorista” (retail banking) employees; old intranet remained operative for all others
- June 2003: Deployed new intranet for “empresas” (business banking) employees; usability department conducted first intranet-based online employee-satisfaction survey
- July 2003: Incorporated first online banking operations into the intranet
- August 2003: Banesto’s president transmitted the company’s annual objectives speech via intranet-based multimedia
- September 2003: Began redesign on *Portal público*, the default intranet homepage for all employees
- December 2003: Began construction on what would become two of the intranet’s most-used sections: *Portal de contratación* (Product Hiring Portal) and the *Catálogo comercial* (Products and Services portal)
- January 2004: Incorporated Microsoft .NET technology; Microsoft Pivot Table business report became available
- February 2004: Began upgrading content management software to OpenMarket 5.5
- Spring 2004: In-house usability and user interface team had nine full-time employees
- April 2004: Launched the *CUSUR* (customer-service portal) for the call center, which deals with all incidents and claims

- May 2004: Launched the *Agenda comercial* (business-agenda portal) to support Banesto's sales force
- June 2004: Launched the *Gestión hipotecaria* (mortgage management) transactional application, which was two years in the making
- July 2004: Began redesign for the call center portal and deployed the *Portal de cumplimiento* (compliance portal)

RESULTS

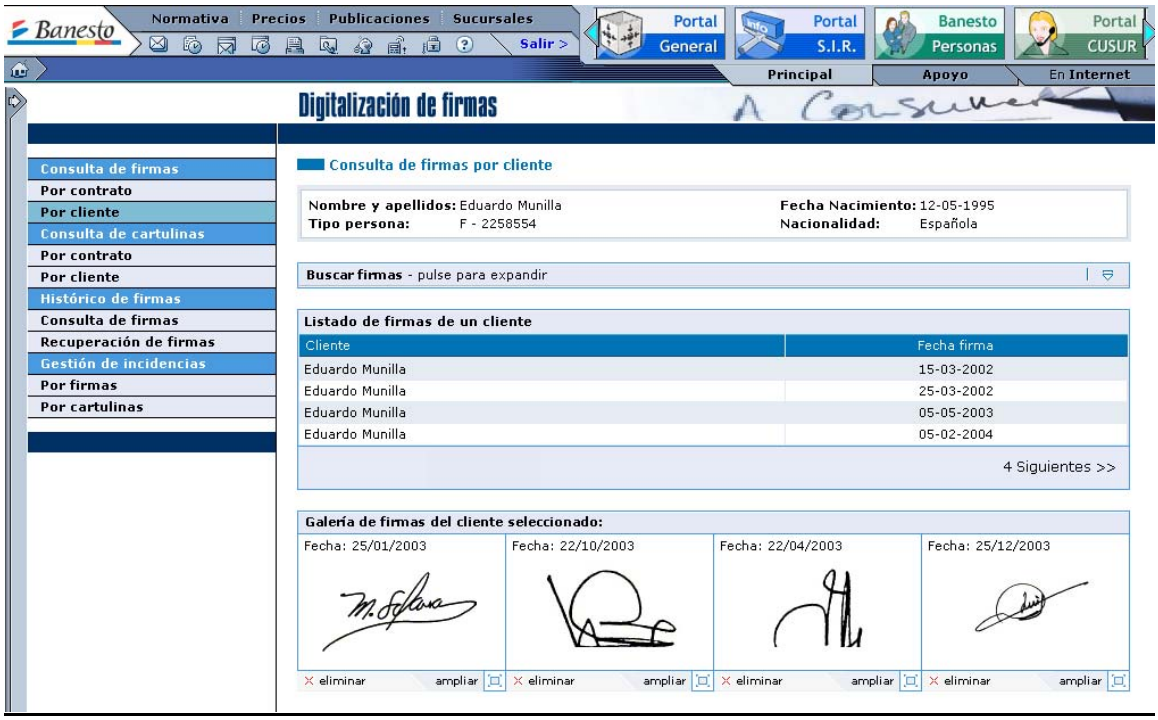
The redesigned Banesto intranet began launching, portal by portal, in March 2003. With these new portals, for the first time the intranet was scalable, maintained a consistent interface — no matter the portal or business application — and utilized well-defined, intuitive interfaces.

Getting there, however, wasn't easy. Just in the usability department, "each team member had to constantly juggle seven or eight projects at a time, some of a very complex and serpentine nature," says Danny Poves, a usability consultant at Banesto. The process is still ongoing; multiple portal redesigns remain.

Yet the work paid off, with users benefiting from the myriad design and interface improvements, plus the bank's upgraded technology infrastructure. "Though a better Internet connection has undoubtedly improved response times, the decision to set guidelines on the use and optimization of images, the sensible use of the design program Macromedia Flash, and the reutilization of modules, has all contributed to improve interfaces, leaner pages, and faster page downloads," says Ricardo Salazar, an interactive designer at Banesto.

Users are embracing the new intranet, including the personalization features, which deliver information and applications tailored to their job function. During April 2004, the intranet had more than 6 million page visits, up from 1.5 million in April 2003. The *Normativa* (regulations) section alone received almost 1.1 million page hits in November 2003 when the bank reorganized. Employees also have online training options, and logged a total of 19,339 hours of online training in 2003.

The new intranet allows the bank to better conduct all of its business via a Web-based interface.



Pictured: The Banesto intranet standardizes the interface for any application, including this customer service signature-review tool.



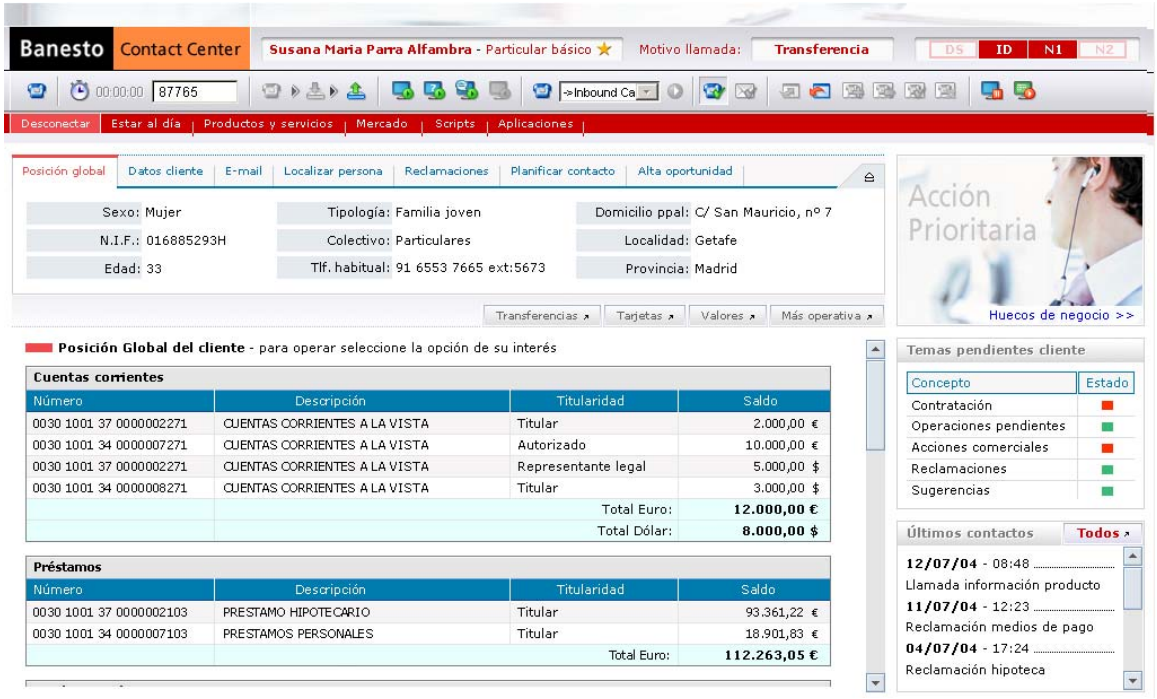
Pictured: This portal, devoted to employees' outside pursuits, offers another example of the intranet's standardized interface.

One example of how the Web-based interface simplifies business is the recently launched Tarifa Plana (flat rate) product, which uses the intranet to guide the sales team's efforts. "First the product was promoted internally on the main intranet portal homepages," says Poves. By clicking a banner, users navigated to the *Catálogo Comercial* (the product and services portal), which offered a detailed product description. The sales force could also view tips on how to sell the product, and could launch the application they use to record sales with a single click. Also, because the portal reacts to user profiles, if the user browsing the catalog was, say, a business analyst rather than a salesperson, the portal might offer access to client records or display business intelligence reporting based on the product's sales.



Pictured: The new intranet presents a range of information to users in a consistent way, without requiring them to navigate through back-end applications or other user interfaces.

Another cost-reduction example is the customer-service portal (*CUSUR*), which customer-service representatives use while handling incidents or claims. "Today, the user walks through a series of questions that eventually lead to a solution, or else a simple, online report will be generated and sent to the relevant department," says Téllez. Behind the scenes, this portal integrates with Banesto's PeopleSoft implementation.



Pictured: The *Contact Center* portal centralizes information and access to applications for customer-facing employees, improving productivity.

The use of more modular and reusable code has simplified the overall intranet. The usability team estimates that the new intranet's code base is about half the size of the old.

One new piece of code is a rotating carousel menu that lets users navigate between available portals, an interactive map, and collapsible portal menus. Thanks to this carousel navigation, says Salazar, "out of Banesto's 9,000 employees, not one has complained about their experience navigating the new Banesto intranet."

As the rotating menu indicates, the new intranet is more fun. Users now have an online marketplace: a "cambalache" (second-hand store) for buying and selling almost anything. The intranet also features an online leisure magazine, online advice on health-related work issues, and a portal with "good deals on products with special financing schemes," says Sánchez.

Another portal, *Solidaridad x2* (solidarity times two) is an online program for donating to selected charities. When users make a donation, the amount is automatically debited from their Banesto bank account, and the bank matches the donation with an equal contribution.



Pictured: Banesto matches employees' donations to a number of charitable organizations.

The intranet redesign also furthers Banesto's move toward paperless branch offices. "Today, in the Banesto intranet, users don't see any print buttons or icons in banking applications or portals," says Sánchez. In fact, 98% of applications now lack such graphics. Thanks to this design change, he says the number of pages Banesto employees print dropped by 41%, from 7.9 million in 2002 to 3.4 million in 2003. In addition to being better for the environment, Banesto projects that this change will decrease its toner and paper costs by 30% per year.

One secret to the intranet's success was moving from a department-centric information architecture to one focused on job function. In other words, in the new intranet, departments no longer own content. "For example, in the new Banesto intranet, the customer-service portal doesn't belong to any business unit in particular. But an employee can still access this portal regardless of whether he or she is in private banking, personal banking, or retail banking," says García, the HCI consultant.

Even better, the new intranet is personalized, and includes business-dashboard capabilities. "Although providing personalization for each and every intranet user does considerably increase costs, this is a feature that is becoming more and more appreciated, and required," says Sánchez.

One benefit of personalization is a less-cluttered intranet, since users only see or have access to what they're authorized to see. For example, "an employee from retail banking will never get to see the technology portal or the markets portal," says Sánchez. For getting your job done, he notes, "less is more."

One example of the new personalization features is the homepage for Banesto's retail banking directors. The page reiterates the director's current objectives and level of completion. "The information that feeds the diagram is gathered in real time from numerous sources, including the number of new clients gained, sales growth, products and services hired," says Sánchez. "The employee can even compare his results with the average scores achieved by other branches," while not having to navigate to specific data-mining applications.

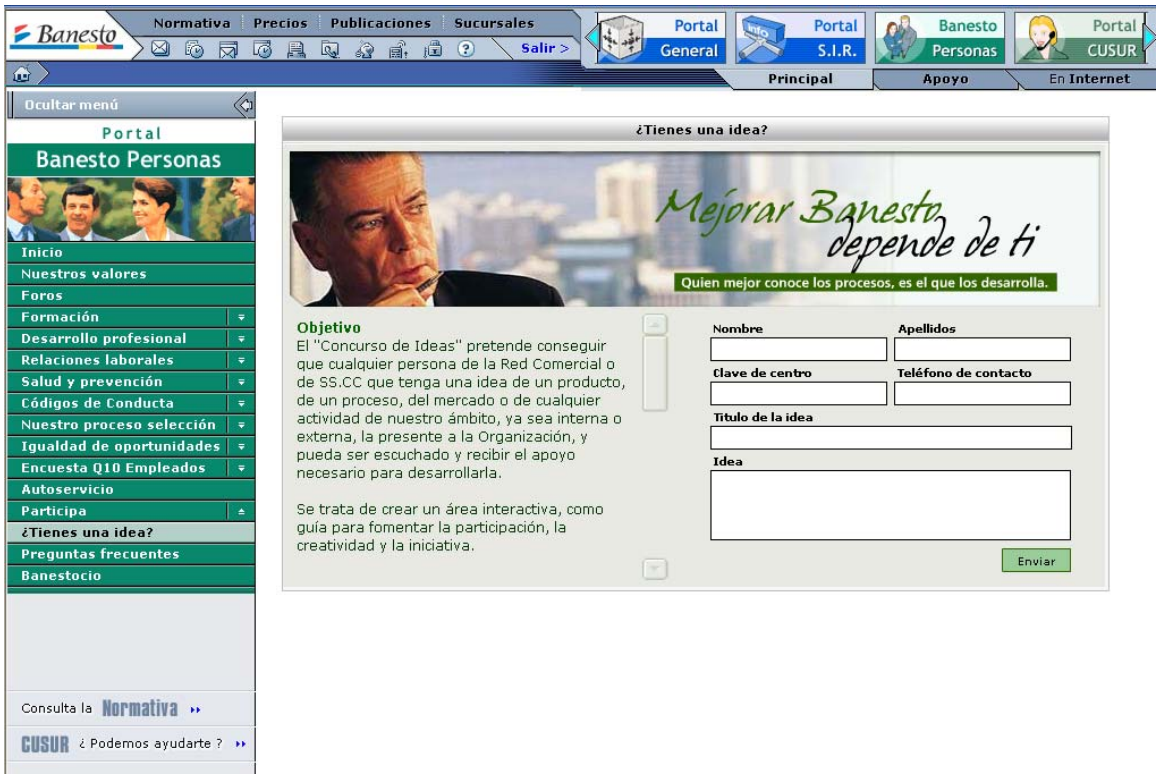
Another example of employee personalization is "banesto personas," a portal for employee career advancement. Here, employees can research courses and availability, see a list of courses already taken, and browse personal information, including salary, taxes, and remaining vacation time.

For recruiting new employees, Banesto offers "recomendar amigos," a way of recommending friends or Banesto colleagues for a new job. In addition to helping generate valuable leads for HR, the recommender can attach the person's resume or curriculum vitae "to speed up an otherwise slow staff-hiring process," says Sánchez.



Pictured: Banesto employees can recommend friends or colleagues for a new job, and attach a resume to help speed the hiring process.

For employees, another personalization feature — of a sort— is the user-feedback option on every page, which forwards messages directly to the usability department. This feedback often generates or directs future redesign work. In fact, says Sánchez, "this information also reaches the director of technology himself," to whom he reports. "This indicates how seriously Banesto's management takes employees' views of, and ideas for, the intranet."



Pictured: Intranet ideas and feedback go not only to the usability department, but also to the usability department director's boss, the director of technology.

LESSONS LEARNED

Insights from Pablo Sánchez:

The art of persuasion. "Some of our success can be traced to political backing in the company, which made the bank both think about usability and take it seriously. To maintain that, our usability department now regularly promotes usability internally, through introductory courses for new software developers, and communications collateral, such as posters, to keep spreading the word."

Create a multidisciplinary user-interface team. A team that combines usability consultants, information architects, graphic designers, and programmers not only guarantees better results, it also helps cross-train — or at least make knowledgeable — all employees in the other disciplines."

Be patient. "In user testing, interviews, measuring results, and gauging feedback, you need a strong dose of empathy to understand what the user is saying, and what he or she means to say."

Don't hurry usability. "As Ángel Laguna, our creative director, would say, 'quality cannot be improvised.' In other words, you can't achieve fast, intuitive, and elegantly designed solutions overnight. So, rather than looking for shortcuts and quick results, take the time and effort you need to do it right. Only this will make the user experience as smooth as possible."

Insight from María José Téllez:

Maintain thorough documentation. "With everything the department juggles, gathering all of the decisions we've made, plus test results and solutions to problems, can be difficult. We could easily fall into the trap of forgetting which decisions we've made, and even contradicting ourselves. Therefore, we constantly update our usability manuals and guidelines, not only to track change, but also to help guide consultants and acculturate new team members."

Allianz Australia Insurance Ltd.

Using the Intranet:
Founded more than ninety years ago, Allianz Australia, headquartered in Sydney, is one of Australia's largest general insurers, offering a range of insurance and risk management products and services—from home, car, and boat insurance, to premium funding, injury management, and prevention services. Allianz Australia is a member of the Allianz Group, one of the leading global providers of insurance, banking, and asset management services. The Allianz Group's worldwide staff of more than 173,000 serves 60 million customers from offices in over seventy countries.

Design Team:
In-house, webqem, The Hiser Group

Members:
Allianz Australia: Dan Tully, e-business group manager; Julie Kerrigan, intranet manager; Marcin Szczepanski, senior Web developer

webqem: Steve Whistler, creative director

The Hiser Group: Alinta Thornton, senior consultant

SUMMARY

Just one look at the Allianz Australia homepage gives employees a quick yet thorough overview of what's happening at the organization. The designers elected to include only snapshots of news and management announcements on the homepage. While short descriptions are also generally helpful, at Allianz, a good editor ensures that news headlines are clear and meaningful, which makes them sufficient on their own. Users can easily browse to the longer news items, as well as the news archive.

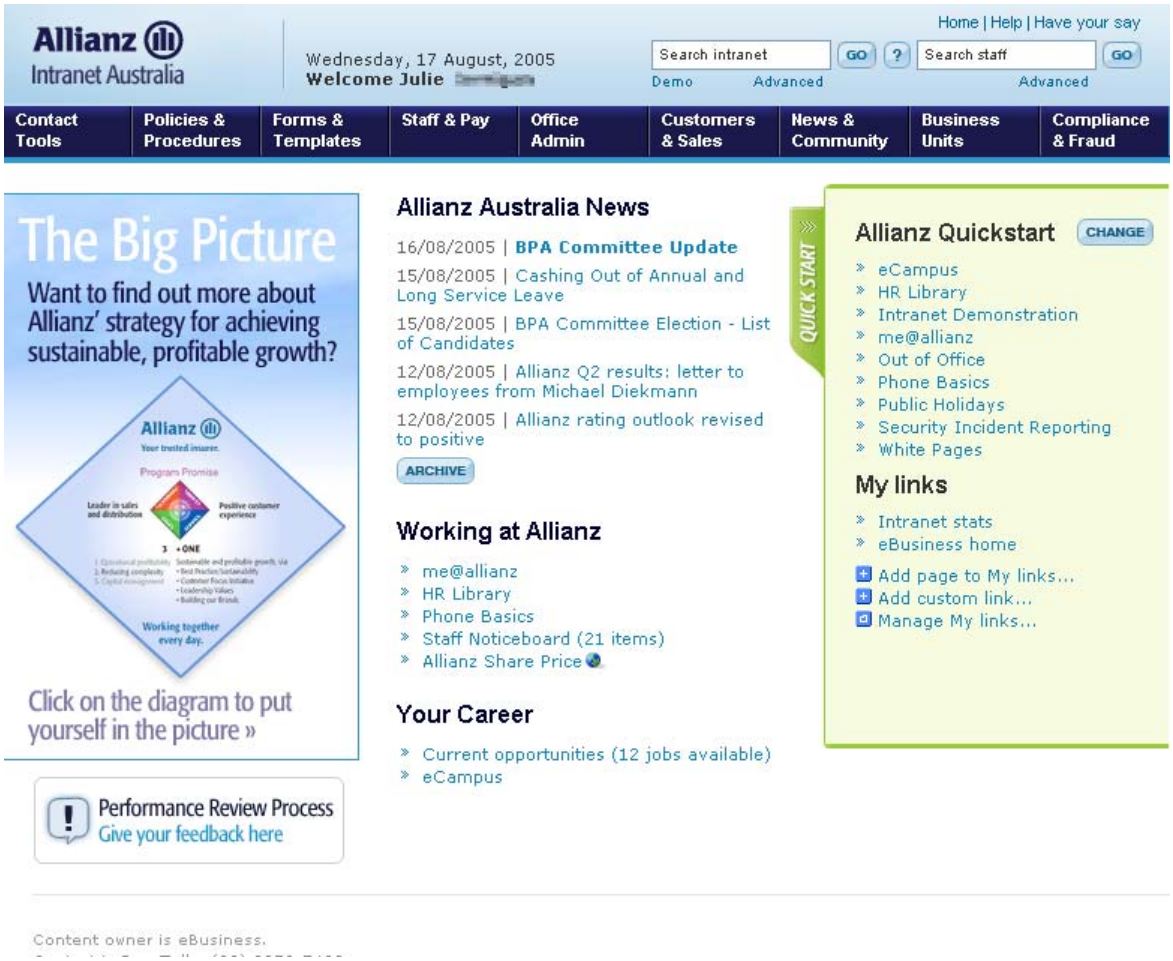
News headlines change daily, with content contributed from a variety of sources: the communications team promulgates internal news relating to leadership values or company culture; the managing director's office often handles financial results; the IT team details outages, as well as desktop patches and security upgrades; human resources (HR) highlights such things as new employee benefits and career development opportunities; and the compliance team keeps the company informed of best practices and policies relating to regulations.

Current news is crucial, but news archives are equally important. Surprisingly, many intranets fail to clearly indicate how to find their news archives. Here, Allianz succeeds by including a link just below the news headlines, so users can easily navigate past current news and into the archive.

By and large, a company's intranet—and, specifically, its intranet homepage—is becoming the vehicle of choice for company executives to communicate their vision and corporate strategies to employees. Indeed, fewer and fewer companies today spend money to generate printed newsletters or memos. Beyond monetary considerations, there are also cross-cultural concerns: as companies become more global, managers must ensure that all employees, regardless of location, understand a company's unified vision and strategy.

Allianz Australia has more than 3,000 employees geographically located throughout Australia and New Zealand. Ensuring all employees receive a consistent corporate message is obviously important. As with many organizations, email and the intranet are key mediums at Allianz for ensuring that employees have easy access to the company vision and news. Allianz Australia nonetheless retains a strong commitment to face-to-face communications between executives and employees. The intranet does not replace the human touch.

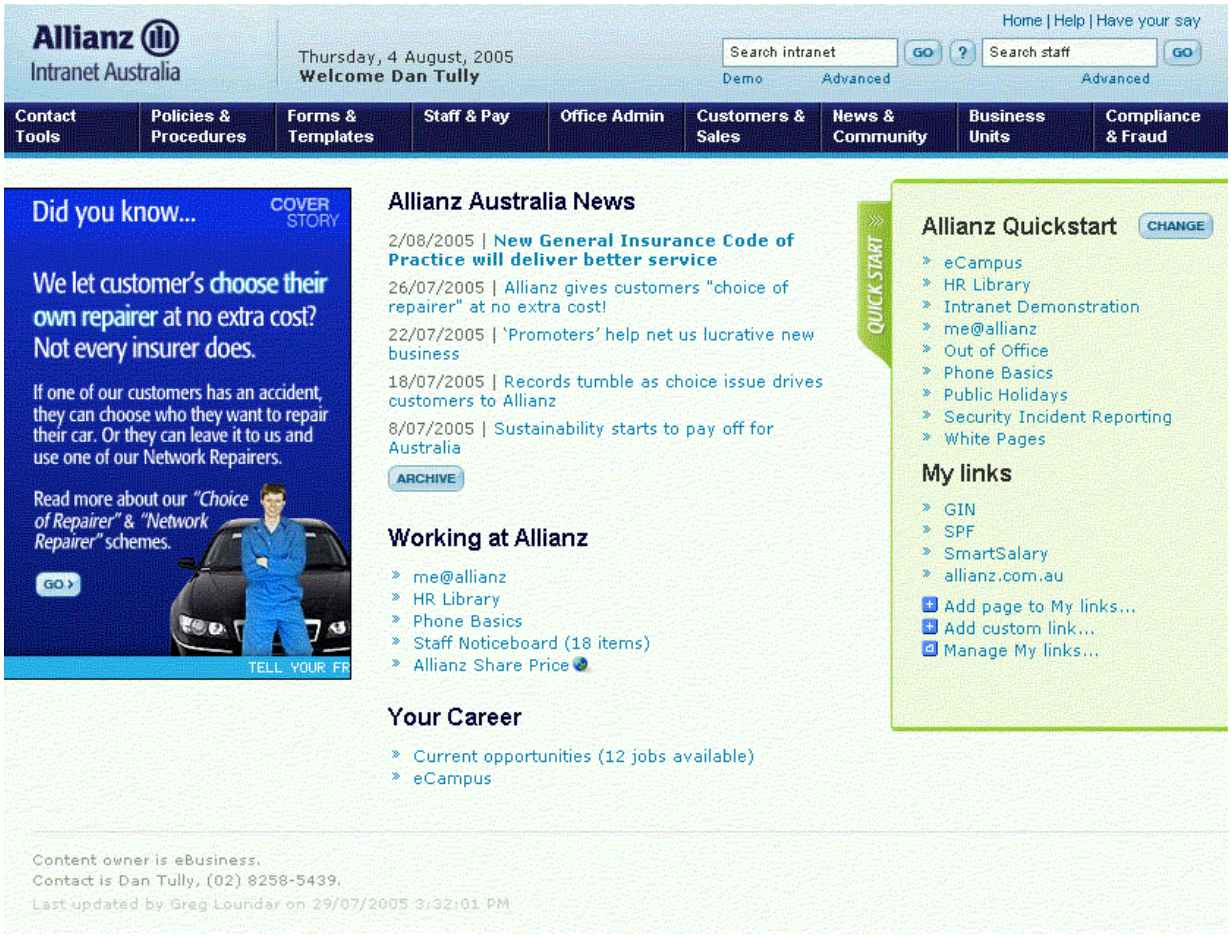
On the left side of Allianz Australia's intranet homepage, an interactive tool promotes a specific corporate agenda, and different business units book this space for their own needs. The intranet team then massages the content.



Pictured: The Allianz homepage provides staff with access to the latest corporate news and communications, a corporate directory and keyword search box, and career-related information. Employees also have links to the self-service HR portal (*Me@Allianz*) and a staff notice board. Meanwhile, *Quickstart* gives individual business units easy access to especially relevant content anywhere in the site. The left side of the page is reserved for internal promotions.

The page's left-side content stays fresh: it changes at least twice a week, featuring either one large or two small promotions. One recent homepage promotion was *The Big Picture*, which explained how the company's strategy and values fit together. Other recent promotions included a 30-second tip on how to use intranet search, a listing of top salespeople for the third quarter, occupational health and safety procedure reminders, winners of a leadership values competition, updated employee benefits information, and a preview of a new Allianz Australia television commercial.

In general, the HR, compliance, sales, training, and e-business teams also tend to run promotions here. Sometimes there are so many promotions booked that the space appears to change every time an employee revisits the homepage.

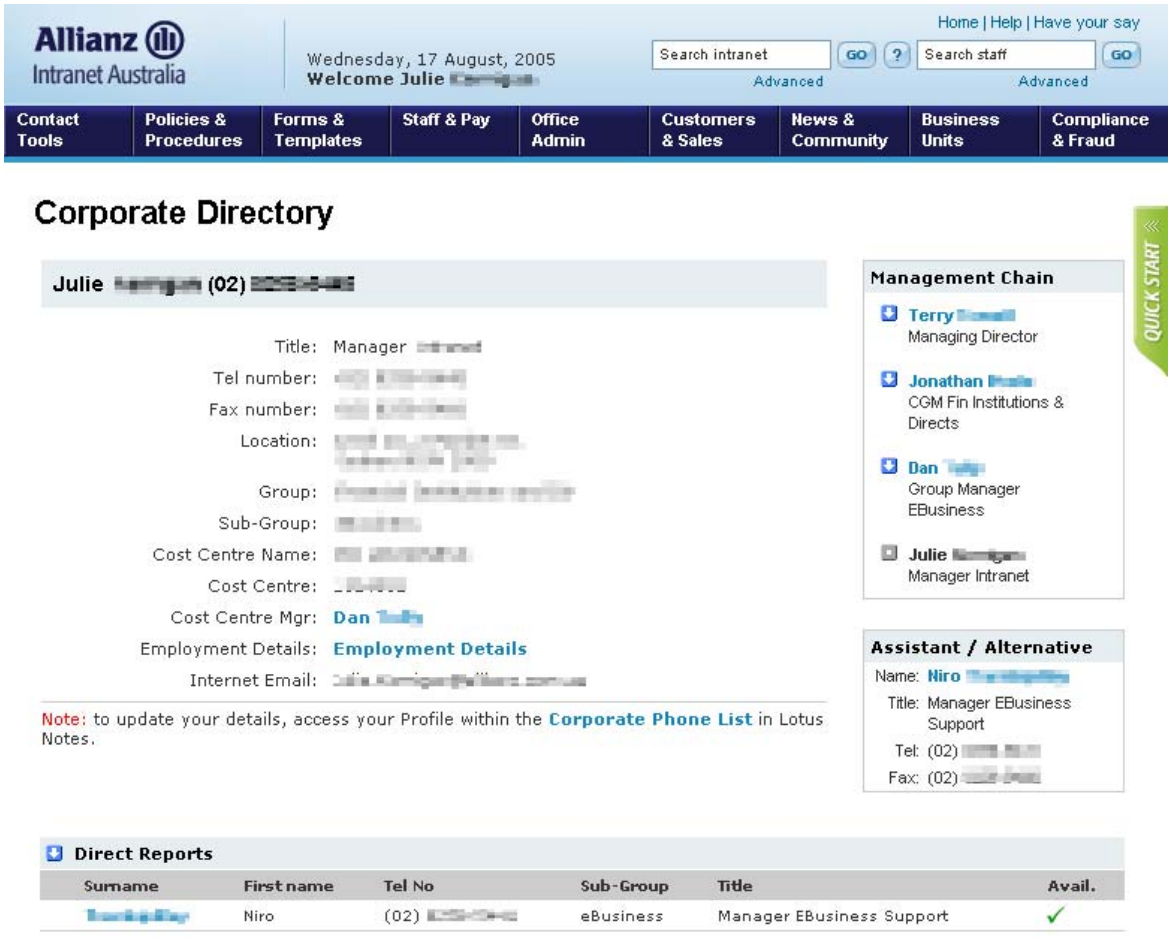


Pictured: Promotions on the left side of the homepage change at least twice a week. This promotion highlights a television advertising campaign for customers.



Pictured: Other campaigns highlight new intranet features, such as how to use the redesigned intranet's improved search capabilities.

From the homepage, users have a dedicated search box for finding employee information. The results page returns a variety of useful data, including not only the target employee's contact information, but his or her direct reports and place in the management chain.



Pictured: The Allianz Australia address book includes a range of information about employees, including their direct reports and their place in the management chain.

URL AND ACCESS

The Allianz Australia intranet's URL is http://allianzintranet. The intranet homepage is the default browser start page for all employees. It's also bookmarked in all browsers. When away from the corporate LAN, the sales force can access the intranet using EVDO wireless broadband technology.

CONTENT MANAGEMENT

Technology and Features

Allianz Australia uses a Lotus-Domino-based CMS that was built in-house. "It was more cost effective and a better fit to the business requirements to custom build the CMS, rather than using an off-the-shelf solution," says Marcin Szczepanski, a senior Web developer at Allianz Australia. "Building the system ourselves meant that it could be tailored to our processes, rather than having to adjust our processes to match an off-the-shelf tool. Having the knowledge and application code in-house also allows us to more rapidly respond to bugs and feature requests, compared to dealing with an external vendor."

The CMS provides content owners with a variety of tools, including a workflow system to automatically route pages from content author, through sign-off, to publishing. CMS features include: page-expiration-date scheduling, page approval processes, and metadata for categorizing page content. Furthermore, role-based access controls restrict CMS access to content owners and determine which parts of the site those content owners can alter.

Content Editors and Workflow

While the workflow technology is set to route content automatically, there are several "soft" processes in place, too. For example, all content editors undergo training before helping maintain their business section's content. Tools and permissions limit the pages they can edit.

Allianz decided to use distributed content authors because "we wanted to utilize the skills of the business and give them authority and responsibility for supporting their own internal customers," says Julie Kerrigan, the intranet manager at Allianz Australia. "By making them visually accountable, they also receive direct feedback that can be used to improve their content." And Allianz puts its money where its mouth is: content owners have explicit authority "to prepare and publish content on behalf of their business."

The decentralized CMS technologically supports this approach, letting content owners "create and edit their pages within their site areas, without any IT intervention," says Szczepanski. Furthermore, "there is a 'preview' function that allows the content owner to see their changed content in a staging area."

The intranet team ensures design consistency via pre-designed templates. Choices available to content owners vary by business unit and are restricted via roles-based access controls. When the CMS publishes the page, it invokes the designated template.

After content editors click a "submit" button, a change request is automatically routed to the intranet team, along with a link to see the changed content in the CMS. "The intranet team representative will use *Approve* or *Reject* buttons, with the workflow sending an automatic email to the content editor advising them of the action taken, and the change being published to the intranet," says Dan Tully, the e-business group manager at Allianz Australia.

Other site sections instead utilize specialty workflows, he says. "For example, the finance team has an additional step in their workflow to include an internal finance reviewer." Employees with permission to update news items have a different specialized workflow that publishes content directly to the intranet, avoiding the sign-off loop.

The CMS maintains an audit trail for every intranet page. "This includes all actions performed on that page—check out, approve, reject, go live, and so on," says Szczepanski. "Also, whenever a new version of a page is made live, the previous version is retained in case it is later required."

Metadata

To improve the relevance of intranet pages in search results, content editors use metadata to describe every page. The content editor determines which metadata terms to use after initial training and guidance from the intranet team. As Tully puts it, content editors "have the best understanding of their content and possible terms that users will use."

All pages now use metadata, though the functionality was originally introduced in staged rollouts while the intranet team learned how best to apply it. "When implementing metadata, we first focused on our top-used pages, then on our top search terms and their results, and then on individual business unit top-used pages," he says.

The accepted best practices for employing metadata aren't static. Every month, the intranet team reviews search results for top keywords, then recommends appropriate changes to content owners.

TECHNOLOGY

Basic Hardware and Software

Three Windows 2000 servers running Lotus Domino 6.5 power the intranet. A separate Verity Ultraseek v5.2 server provides search. The intranet team heavily customized all page templates so they'd fit into the intranet's look and feel. Webtrends 7 provides site usage statistics. "We also have some management and reporting scripts that are written using Python," says Szczepanski.

An external design company creates most of the site's graphics. Intranet team members also contribute smaller work when possible, using Adobe Photoshop and Jasc Paint Shop Pro.

For developing page templates, the intranet team used relatively simple tools. "The HTML, style sheets, and JavaScript code required for the templates were developed with a simple syntax-highlighting text editor—no visual development tools were used," says Szczepanski. "Most of the HTML and JavaScript is fairly standard. However, we started using AJAX when developing the *Quickstart* functionality and we foresee greater use of this technology for future applications—if we feel an intranet application's usability will benefit from its use."

Using AJAX for Quickstart Functionality

Quickstart lets users maintain a shortlist of their most useful intranet tools or content areas. According to Szczepanski, the development team used AJAX to develop *Quickstart* so that the individualized application contents "did not have to be embedded into the page while the page was being built, server-side." Instead, the page gets built then a JavaScript file included on the page uses an XMLHttpRequest to retrieve that user's *Quickstart* data.

This approach permits much faster page loads, since the server doesn't have to first build in the *Quickstart* data. Furthermore, he says, "you can make persistent changes to your *Quickstart* without reloading the rest of the page."

This approach works well for the Allianz intranet because it's a controlled, single-browser environment. "If this was an Internet site—where we can't guarantee a particular browser, or even that a user has JavaScript enabled—then we probably would not have used AJAX," he says. To use AJAX in such an environment, he says, would require fallback mechanisms to support users regardless of their technology, which would inevitably increase development time and maintenance requirements.

GOALS AND CONSTRAINTS

Goals:

- Provide a clear, task-focused design.

- Make information, including policies and processes, quick to find, reducing searching time.
- Make the site intuitive and easy to learn.
- Reduce content depth (levels).
- Provide templates tailored to specific user groups, such as policy operations, the workers' compensation division, and claims.
- Improve knowledge management by providing a single repository for documentation and information.
- Promote corporate culture and values.
- Upgrade the intranet platform from Lotus Domino 5 to Domino 6.

BASIC INTRANET FEATURES

The Allianz Australia intranet supports a wide variety of employee tasks. For example, staff members have easy access to corporate news, internal career opportunities, and executive communications. A staff notice board also allows employees to post notices.

Employees can search the corporate directory as well as the whole intranet. In the latter case, the search results sometimes include "best bets" to make navigating results easier.

For collaborating with business partners, employees can share documents and run Web conferences.

The intranet also includes many intranet-based, self-service applications. *Me@Allianz* lets employees view salary, personal, and holiday information. The e-learning section, *eCampus*, promotes intranet-based compliance and product training.

For content owners, the intranet provides a style guide, which is consistent for the Club Marine, Hunter, Recovre, and Allianz New Zealand subsidiaries.

Overall, the site is focused on communities of practice—common tasks users must perform—rather than departments. All users also have the personalized *Quickstart* feature on every page.

The CMS automatically routes content changes to the appropriate person for sign-off when necessary, maintains an audit trail of changes, and expires outdated content.

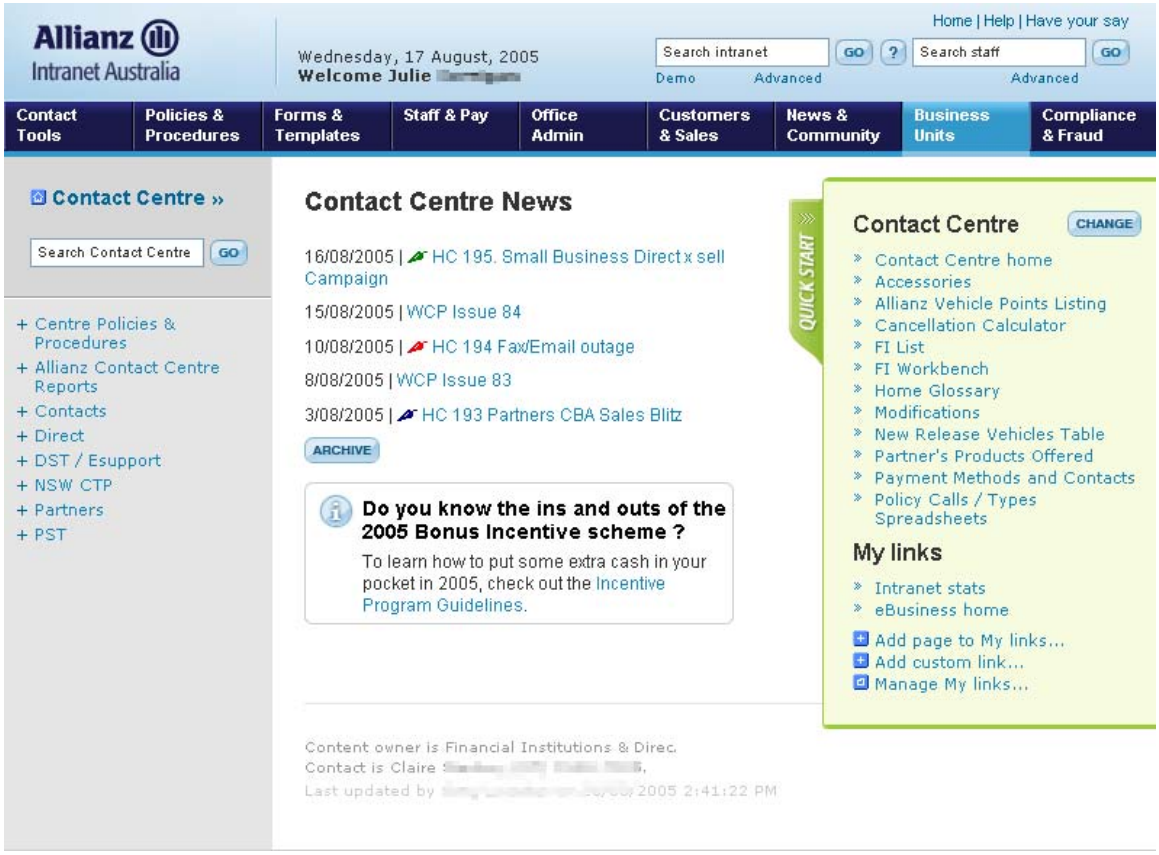
At Allianz, the intranet provides employees with an internal communications channel. Business teams can use it to expose internal employees to external campaigns. The communications team also designs in-house campaigns, for example touting how to use intranet search, or using the intranet to highlight salespeople with the highest monthly sales.

The intranet gives Allianz's customer service teams—who are available to customers fourteen hours a day—the tools they need to support both direct customers and business partner customers.

"The majority of customers require immediate assistance," says Kerrigan. To help, information is available via the intranet within various customer service teams' specialty homepages. To help content owners keep content on those pages as fresh as possible, "the pages use the same intranet format and can be updated within minutes by the business content editor whenever necessary."

The sales force can access Cognos software via the intranet to run reports on the corporate data warehouse and compare sales plans with actual sales. Underwriters have similar tools to analyze insurance portfolio performance, and cost center managers can access and manage financial data online.

The intranet itself is also a part of the company's information-backup plan. "The intranet is used as a business continuity planning tool for the Customer Contact Center. In other words, when the point-of-sale system is unavailable, new-business templates are available on the intranet," says Kerrigan. The intranet itself is an extremely high-availability platform, and is included in disaster planning efforts so the business can ensure critical data is not only backed up, but can be quickly restored.



Pictured: If the mainframe goes down, the intranet's *Contact Center* provides that business unit's employees with a trusted, high-availability information source, including access to all needed forms.

USERS

The Allianz Australia intranet has over 3,000 users throughout Australia and New Zealand.

USER TASKS

- Search the staff directory
- Conduct keyword searches to find information

- Read the latest Allianz Australia news
- Peruse career options (job vacancies and opportunities are published twice a week)
- Access HR policies and procedures
- Use *Me@Allianz* to access personal information, including salary details and vacation time
- Use the *eCampus* e-learning tool to receive compliance and product training
- Access online claim forms and policies and procedures, including information about products Allianz Australia offers
- Read the staff notice board

BACKGROUND

Forming an E-business Team

Allianz Australia's e-business team was established in July 2000 to develop and implement a corporate e-business strategy. There were three priorities for the group:

1. Establish an employee intranet to improve knowledge management
2. Create a secure extranet portal to facilitate communication and online insurance transactions with business partners
3. Build an e-commerce website (allianz.com.au) to sell insurance directly to customers

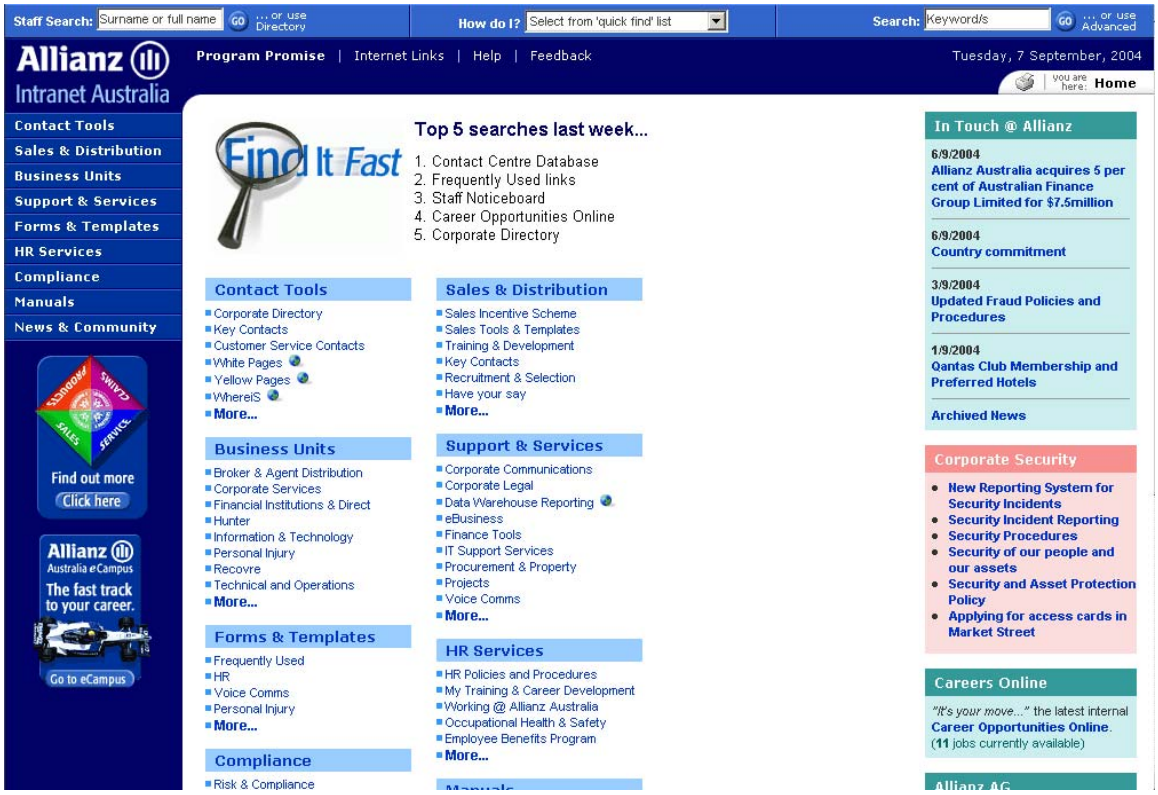
"To ensure group synergies were achieved, the team had responsibility for the strategic development of all Web channels: intranet, extranet, and Internet," says Tully. Thus, the group oversees the design of the customer experience, maintains Web style guides for content creators, and helps ensure Web asset reusability.

Intranet: Founded in 2001

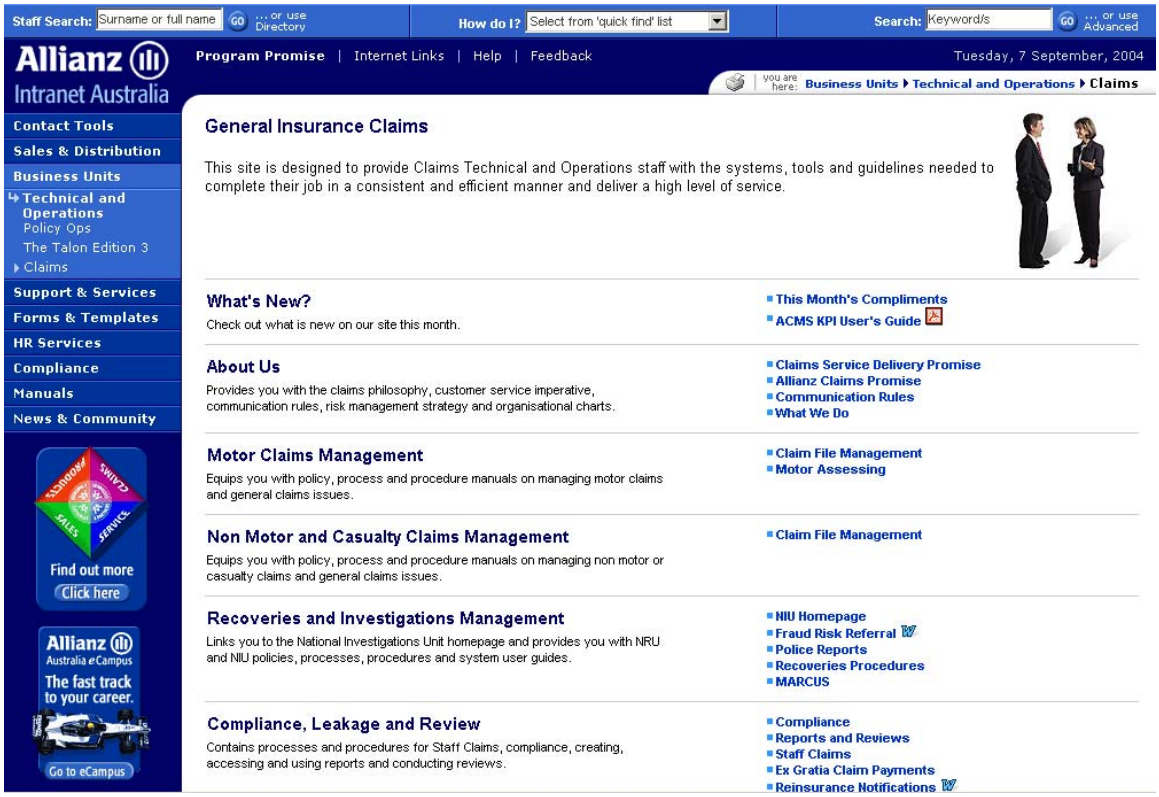
Allianz Australia launched its initial intranet on January 10, 2001. "The driver to starting the intranet was to improve knowledge management," says Tully. There was a wealth of information inside Allianz, yet employees had a difficult time finding it, let alone accessing it.

The main knowledge-sharing problem was that "there was no common link between Lotus Notes database structures," he says. "If a database was not already open on your Lotus desktop workspace, how would you know information even existed? Access to information was just not intuitive."

Furthermore, the only corporate communications channel was Lotus Notes email, which resulted in large amounts of information flooding into in-boxes. The goal, then, was to make the browser the only tool an employee would need to access corporate information, "without having to worry about replicating Notes databases, accessing shared drives, and so on," says Tully.



Pictured: The original Allianz intranet, developed in 2001, was launched to improve information sharing by moving away from Lotus Notes databases. The site's information architecture was largely based on a department-centric view of the organization, rather than being arranged to meet users' actual needs.



Pictured: A department-level page from the initial version of the Allianz intranet, developed in 2001. Rather than being a business-critical tool, the intranet was generally regarded as a nice place to store information.

DESIGN PROCESS AND USABILITY ACTIVITIES

Planning Size of Redesign

Allianz Australia needed to redesign its intranet to better suit how employees do their jobs, since the original intranet—produced in a time of multiple mergers—simply offered "'brochureware' content and HR information," says Kerrigan. "To support the company's 'customer-centric' approach, we looked for ways in which the intranet channel could meet the staff's need for quick access to information, tools, and general communication."

The intranet team approached the question of intranet improvement from several perspectives. Team members conducted workplace studies with users, watching how they completed predetermined tasks. They also interviewed ten key internal stakeholders about what they needed help doing. Such stakeholders included the heads of marketing, HR, claims, the IT department, and sales and distribution. In addition, the intranet team conducted field studies and card-sorting exercises with 100 different employees from all over the organization, sitting with them and watching how they used the intranet, "to understand day-to-day usage and tasks not currently intranet related," she says. The team followed up each visit with an online survey (conducted through the company's online survey tool) to better understand how the intranet did or didn't help employees.

Based on that research, "our findings indicated that a complete redesign, rather than small changes, was needed to meet employees' requirements," says Kerrigan.

Launching the Redesign

For redesign advice, "our starting point was a review of the Nielsen Norman Group *Intranet Design Annual* top ten to benchmark Allianz Australia against peers. This enabled us to perform a simple, high-level gap analysis," says Kerrigan.

To get the redesign moving quickly, the intranet team hosted a three-day workshop. Participants included the intranet team, the IT intranet team, and a business representative from the Contact Center—the company's largest user community. "It was important to include the IT intranet team in the design process as they had many ideas on how technology could support business goals," says Tully, adding that they included the business representative "to ensure we maintained business focus."

The team turned to outside experts as well. "We wanted to bring external industry best practice to the table, and also someone who would challenge our business assumptions," says Tully. So the intranet team invited a usability consultant from an external usability company, the Hiser Group, plus Web designers from an external Web design agency, webqem.

"In the workshop we—as a joint team—agreed on intranet goals and objectives. Then each team member worked on aspects of the intranet's design to meet the agreed-upon intranet goals and objectives. Every couple of hours we reconvened to present our designs to the full team, selecting the best design elements and then moving to further refine the design," says Tully. "At the end of the three-day workshop, we had two wireframe designs to test with users." The wireframes offered users a new information architecture, plus a range of new functionality.

The team also articulated the intranet redesign success criteria. "The business needs have developed from staff requiring occasional, generic information, to staff being dependant on an interactive, singular reference source that supports business practices," says Tully.

As a result, he says, "the key focus of the redesign was to provide a clear task-focused design that is intuitive and easy to learn, making information and tools quick to find, thereby providing a better experience for staff and ultimately our end customers."

Testing with Paper Prototypes

Using paper prototypes, the intranet team conducted usability tests with twenty users. They asked the users to perform several tasks, including finding a phone number, starting an approved online training course, finding the latest company news, determining which employee benefits they could use for Christmas, and ordering photocopy paper.

Overall, "users enjoyed being involved and being able to provide feedback and recommendations that affected and identified the final design," notes Kerrigan.

Usability testers also gathered more subjective data, including user feedback on intranet functionality and suggestions for intranet improvements. The testers also asked users about the top five pages they regularly used, how often they used the current intranet, whether or not it helped them do their jobs, and so on.

With usability results in hand, the intranet team began to build the redesigned intranet in earnest, continuing to user test along the way.

TIMELINE

- July 2000: Allianz Australia's e-business team (which includes the intranet group) decided to develop, then implement, the company's e-business strategy.
- 2001: Launched first intranet, primarily to create a centralized knowledge management store.
- March 2004: Began usability testing and surveyed 100 employees about their views on the existing intranet.
- April 2004: Interviewed key business stakeholders to understand their aims, goals, and needs.
- April 2004: Held a three-day workshop to generate designs for new intranet.
- May 2004: Tested proposed designs with users.
- May–June 2004: Used wireframe design results to hone the redesigned intranet's business requirements.
- June 2004: Planned intranet-related IT efforts.
- July 2004: Presented senior management team with a business case for redesigning the intranet.
- August 2004: Started building new CMS, plus new intranet templates and designs.
- September 2004: IT built new intranet technology; intranet redesign team began migrating business content to new intranet.
- October 2004: Finished IT portion of intranet; began testing functionality and migrated content.
- November 2004: Trained content editors on new intranet and conducted additional user testing.
- November 29, 2004: Launched redesigned intranet.

RESULTS

The redesigned Allianz Australia intranet was launched in November 2004. Employees rapidly embraced the intranet's improved usability, design, and employee focus.

Post-redesign, many organizations expect page views to increase, both because the intranet is easier to use and because it's a useful metric for demonstrating to senior management that months of work have a discernable payoff.

Even so, Allianz Australia expected page views to initially decline following the redesign. "The new design was aimed at making information easier to find and not as deep," notes Tully. "Hence, less clicks were required to access content."

Nonetheless, page views quickly increased, with logs quickly showing page views growing annually by 100%.

Anecdotal employee feedback highlights the intranet's increased usability. For example, a Contact Center consultant lauded the new intranet as being "easy to navigate." Similarly, a business development manager called the intranet

"wonderful," noting how "it is a lot easier to find what you are looking for, and see what is available to you."

In short, "today the intranet has developed into a tool that is business-critical and used daily by Allianz staff," says Tully.

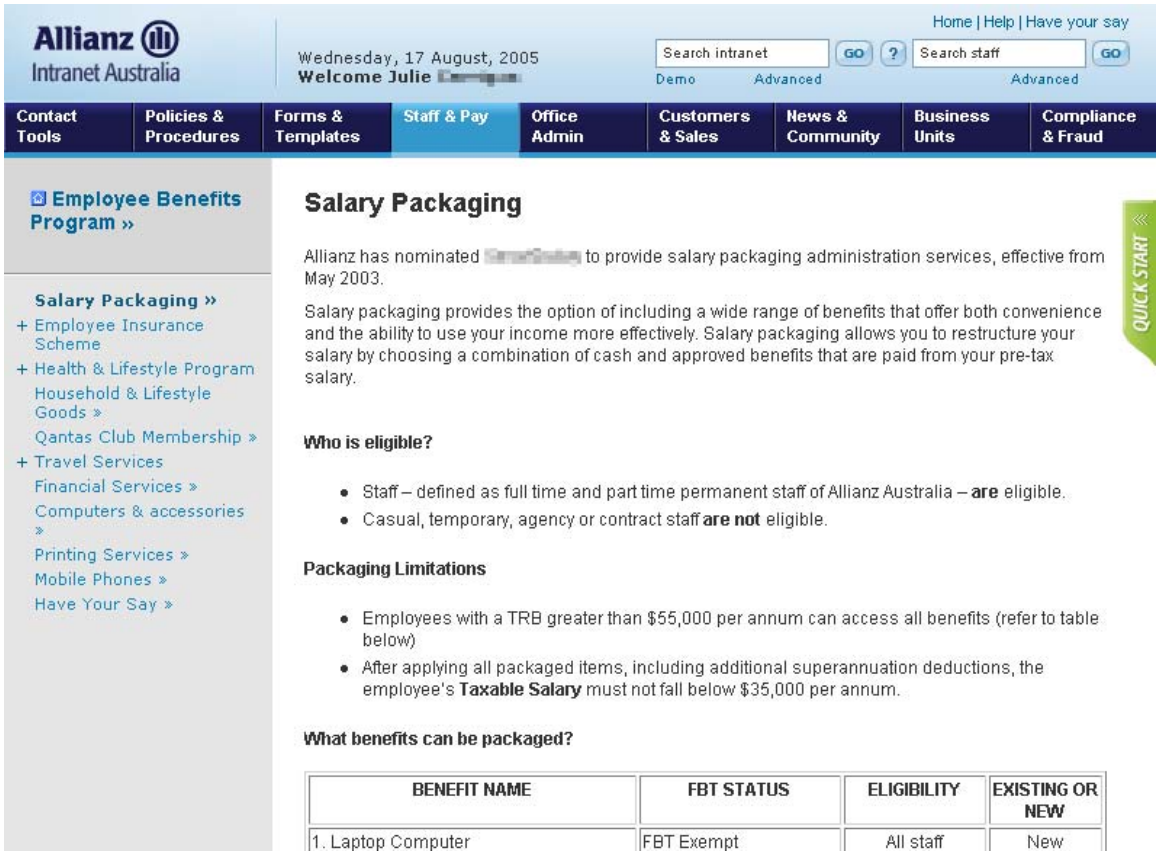
One of the intranet's most immediately recognizable new features is *Quickstart*, which gives employees faster and easier access to frequently used pages. "*Quickstart* is available in its full view from the intranet homepage and business unit homepages, and via a small tab on all other intranet pages—only a click away, without needing to wait for a page to refresh," says Kerrigan. While content owners customize the *Quickstart* pages and links for employees based on their business unit, "staff can also self-manage and add their own additional links to the business unit list for pages."

New employees can take Allianz Australia's new-employee orientation session using *eCampus*, the new in-house e-learning platform. Orientation information includes an online, guided tour of Allianz Australia, information about the company and its history, the various things the company offers, plus video introductions of the senior management team and of the different business units by a unit staff member.

The intranet team emphasizes not only usability, but also high availability. As a result, employees have learned to trust the intranet as a backup should other primary systems fail. "The intranet is now a business-critical application, used as a backup and alternate business process should the mainframe systems be out of action," notes Tully. That's especially important for "the Contact Center, fulfillment teams, claims operations, and personal injury division, which require a single source of information for their users that is centrally controlled and maintained."

The redesign also improved the intranet's information architecture. "A big focus for the team was to bring the content closer to staff," says Kerrigan. "With the old intranet, staff in customer support areas may have needed to drill down six or seven levels to access content." By contrast, the new design gives them *Quickstart*, with one-click access to their designated content. Furthermore, the redesigned information architecture places information four levels down at very most.

The redesigned intranet also better supports HR efforts, providing new, browser-based access to a variety of needed forms. In addition, "the HR manual has been converted from Lotus Notes to an online format," says Tully. Together, these new features "promote awareness and usage of the intranet."

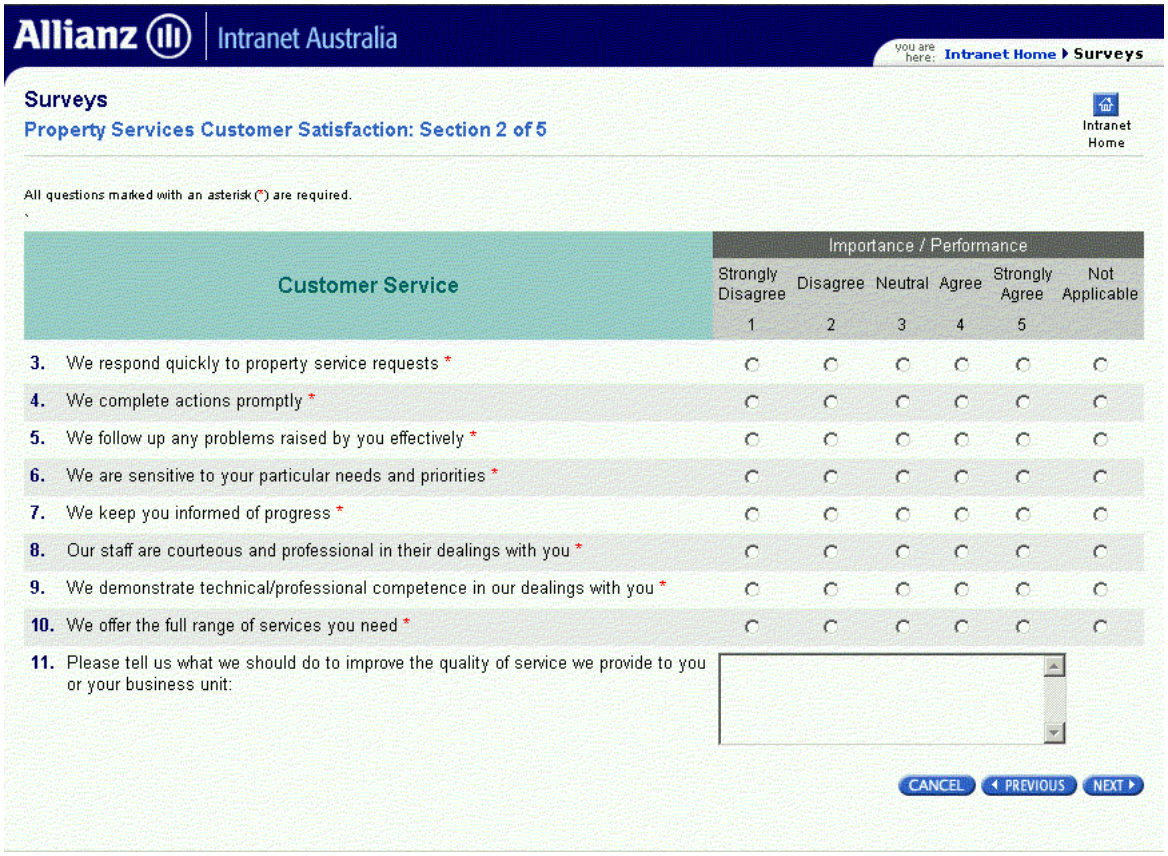


Pictured: The HR area features material previously restricted to Lotus Notes databases. Offering browser-based access to needed forms and information helps bring users back to the intranet.

The redesigned intranet includes a new information architecture: "The new intranet is task-based, meaning that staff can now find information by task, rather than the previous design of sorting through information by company structure," says Kerrigan.

Furthermore, employees can customize their own quick links—available from every page. To help find information in such a large site, users can also localize their searches to specific communities.

To continue improving the intranet, the intranet team listens to users and follows up to ensure that any problems are solved.



Pictured: The intranet team has an intranet-based survey tool that Allianz business units can use to gather feedback.

The redesign highlights how the intranet's raison d'être has expanded over time. "The initial intranet focus was getting our business units to use the intranet, and gaining users' acceptance of the intranet as a core communications channel," says Tully. As a result, the intranet team's primary focus was ensuring that new content was published on the intranet.

Today, however, Tully says the team is "focused on delivering value to the business" by continuing to refine the intranet's design and usability. To help, the team frequently runs content seminars, educating content owners about how to more effectively write for the Web and improve the overall user experience. The intranet team always reminds content owners to focus on the staff's specific tasks and then "isolate how intranet content can make these tasks faster and more efficient."

Even as the intranet has grown, Allianz Australia hasn't had to hire any additional intranet staff. What's its secret? "Leveraging the efficiency of a group-wide style guide, using distributed content management tools, defined content templates, and automatically expiring content," says Tully.

LESSONS LEARNED

Insights from Dan Tully:

Get and maintain buy-in. "Get stakeholder and user buy-in from the beginning and maintain communication, good or bad, with them throughout the redesign process."

Always listen to users. “Talk to your users and find out what they do in their jobs, to understand how you—and, of course, the intranet—can better assist them.”

Test with prototypes. “Test paper prototypes with users. This enabled us to see what users would use and easily learn, and to resist influences to the contrary. For example, what management would like to see on the intranet isn’t always what users would use. Testing gave us needed data for articulating that.”

Bank of Ireland Group

Using the Intranet:

Bank of Ireland Group is a diversified financial services group with market-leading positions in its chosen domestic markets, and niche status in other selected markets. Headquartered in Dublin, Bank of Ireland profit generation is distributed among the Republic of Ireland (56%), the UK (28%), and the rest of the world (16%).

Bank of Ireland was established in 1783 by Royal Charter and today has 17,000 employees in eight countries. It is the largest Irish bank by total assets, and also the highest rated Irish-listed financial institution.

Design Team:

In-house

Members:

Mary Staunton, group internal communications manager; Mick O'Farrell, editor of **in**site; Breffni Wall, **in**site's content and publishing specialist; Mairead Anderson, **in**site's relationship manager; Mairead Haughian, senior graphic designer; Conor Hawkshaw, senior Web developer; Niall O'Callaghan, senior Web developer; Michael Walshe, Web development manager; Martina Osborne, senior business architect; Richard Finnegan, business architect; Robert Treacy, applications developer; Eamon Lyng, applications developer; Padraig MacDonnchadha; applications developer; Natasha Miskella, senior Web developer.

SUMMARY

The Bank of Ireland's **in**site intranet is not like most other bank intranets. Simply put, it swaps serious navy pinstripes for bursts of orange and blue. Don't be fooled, however, by the light-hearted aesthetics: this intranet means business.

Homepage

One goal of the team is to keep users coming back to the intranet, and creating an attractive homepage is one effective technique for doing this. On **in**site, main corporate news items are located center stage where users can quickly and easily read them. The news is accompanied by eye-catching images that add to the users' understanding and punch up the page.

Via the homepage, employees can easily stay abreast of important business news. The *Breaking News* section features several types of business news, separated into tabs for easy scanning. An external news feed provides up-to-the-minute news in business, national, international, sports, and entertainment categories. On the homepage, users can scroll six headlines from a chosen category at any one time, or click through for a full list of the day's breaking news.

Other homepage features that connect users to the world outside the office include an updated stock quote and a link to the company's press releases.

From the homepage, the *My Unit* links lead to information about the logged-in user's operating department.



Pictured: The Bank of Ireland intranet homepage offers personalized, helpful news and an attractive design to keep drawing users back.

Content

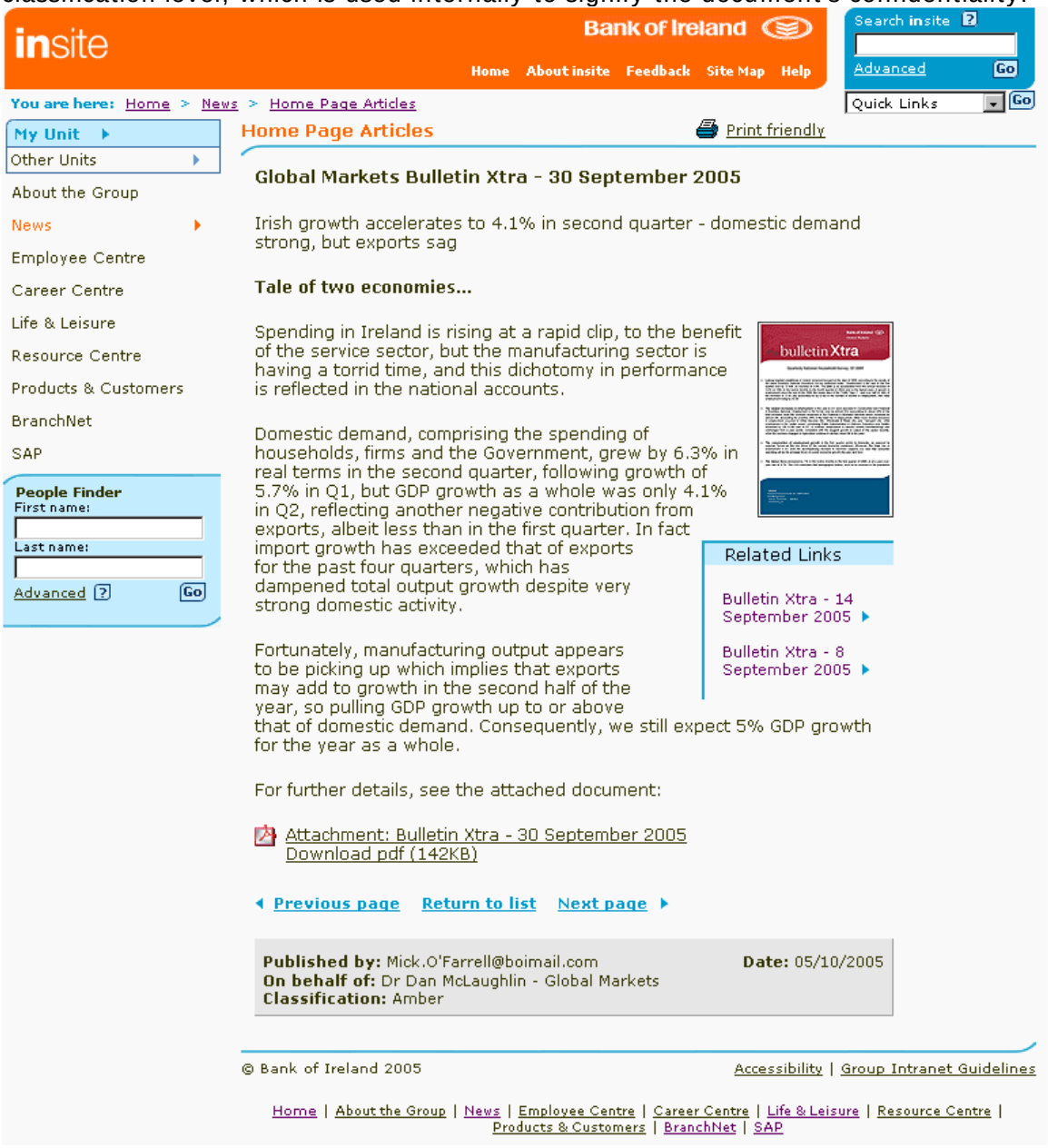
Another way to entice users to regularly return to an intranet is to provide valuable, engaging content and relevant news. To be relevant, however, such content must be fresh. The Bank of Ireland intranet succeeds here; indeed, the intranet's news offerings are one of its biggest killer apps.

To access news items, users can navigate from a homepage link or click on *News* in the left-hand menu of any page. The site's news pages utilize a sans serif font, which makes text easy to read, as does the page's ample default text size and the narrow column width for text.

While some features might seem relatively minor, they really go a long way toward helping users. A *Print friendly* link makes it easy for users to print news items and keep them for later. The *Related Links* box offers topical suggestions. Similarly, the *Previous, Next,* and *Return to List* links at the end of each article give users other ways to explore the news.

When it comes to news and information, many users understandably reference the source of that information to gauge its believability or trustworthiness. Obviously, a well-known or credible source is better than an unknown one. On the Bank of Ireland intranet, users can see the original source of the news highlighted on the left side of every article. Then, at the end of the article, users can also see the posting date, who posted the article (on their own or on behalf of another person), and the item's

classification level, which is used internally to signify the document's confidentiality.



Pictured: News articles on the Bank of Ireland intranet are easy on the eyes and offer relevant features including related links; a link to the news item list; links to the previous and next news items; data about the information's origin; and a link to a printer-friendly version.

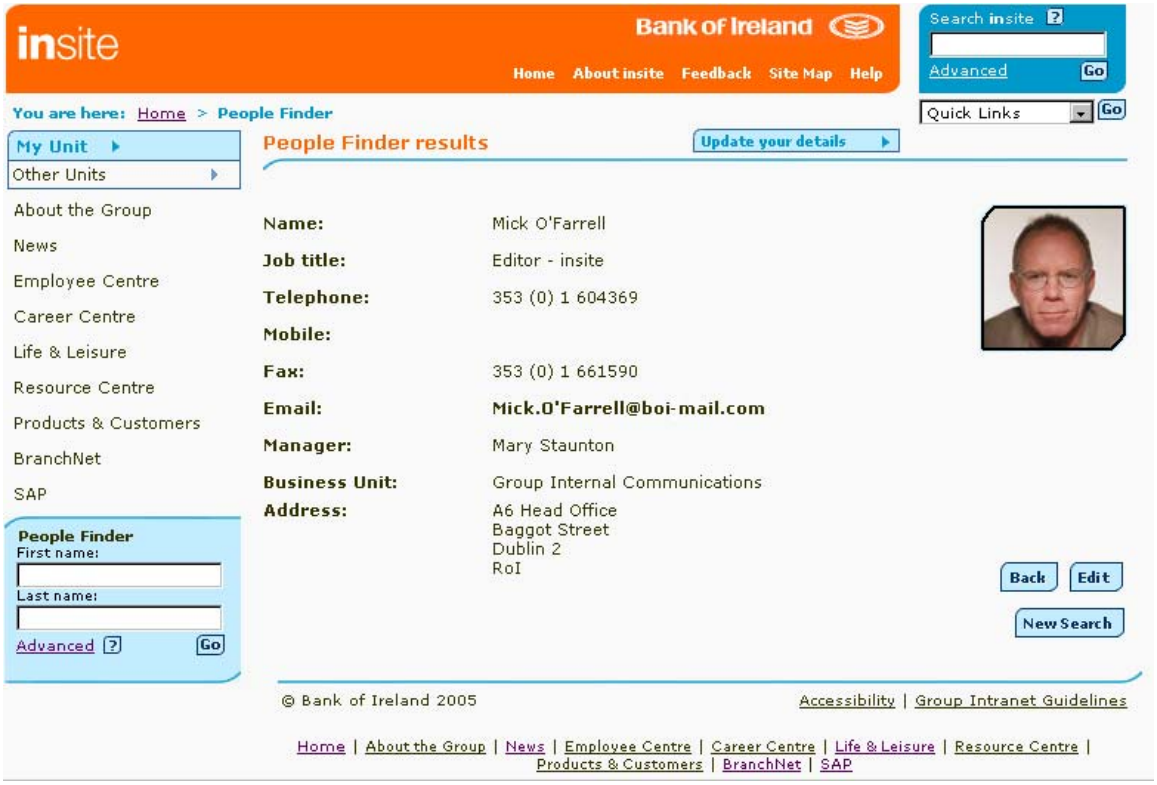
The Bank of Ireland intranet team handles some intranet content, as well as two other content-related roles: teaching and facilitating. Intranet team members train content contributors and sometimes help them get group-specific content online. Typically, however, content contributors feed any information directly to the intranet, and day-to-day publishing of department-specific content is the sole responsibility of individual departments.

Phone Book

Thanks to the intranet's *People Finder*, staff can easily locate information about any of the 17,000 Bank of Ireland employees. The feature is offered on every page of the site, and allows users to search by a person's first or last name, or by using more advanced options.

Each person's profile relays the user's name, job, phone number, manager, email address, office location, and more. Photos help employees recognize colleagues, and the feature's elegant layout makes it easy to use.

Another useful element: each profile lets users return to the *People Finder* to search again.



Pictured: *People Finder* results pages feature a straightforward layout, and contain all relevant information for locating an employee. They also contain a photo and the name of the employee's manager.

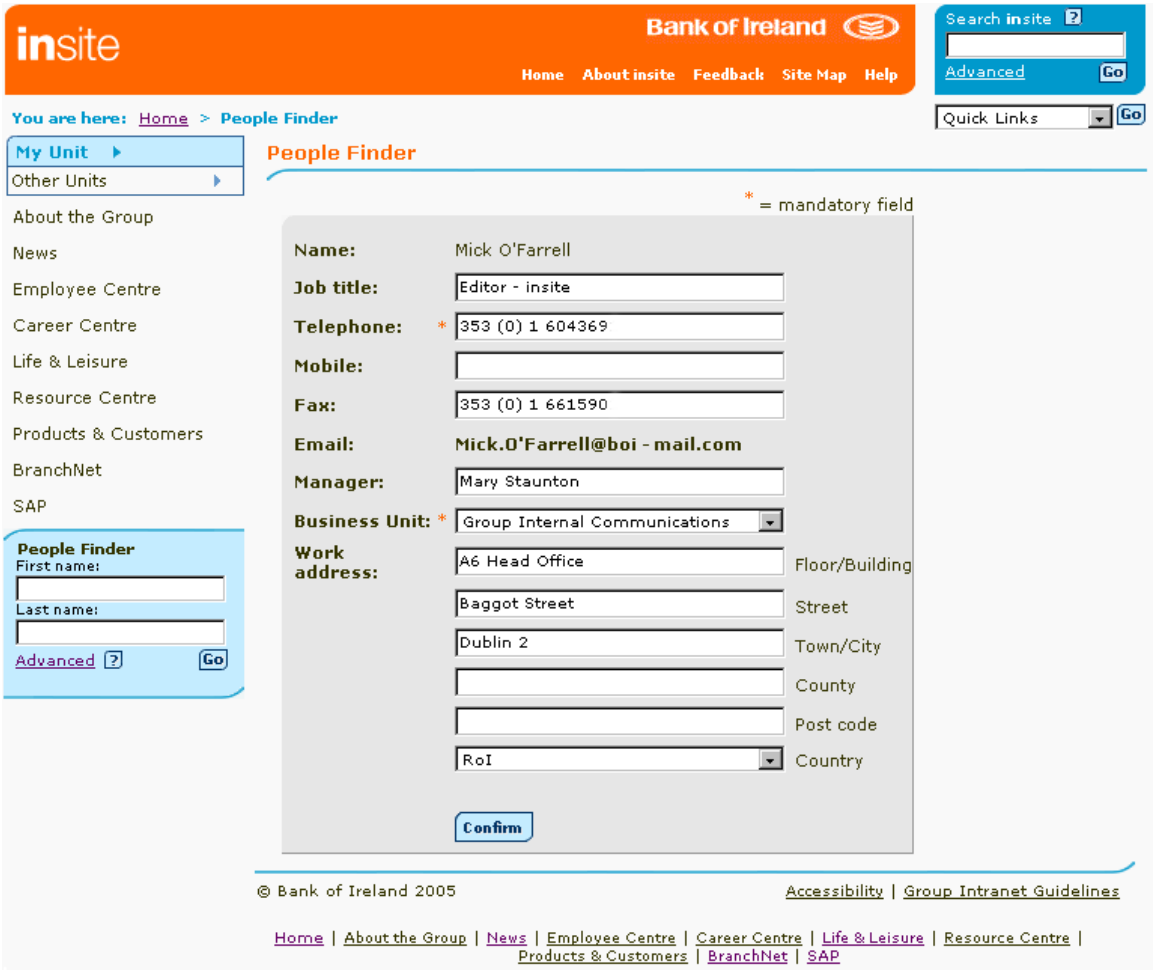
Users can easily update their own profiles by clicking the *Update your details* button. The resulting page, which uses forms, follows all relevant form-related design guidelines, including:

- all fields and field labels are left-justified,
- fields are easily associated with their relevant label, and
- required fields are clearly marked.

Furthermore, the two items that users are not allowed to edit—name and email address—appear as static text rather than fields. This presentation easily and clearly delineates what users can expect to do, or not do, on this page.

At the end of the form, a *Confirm* button makes the changes. Notice the absence of a *Reset* button for this form. This is no mistake: When forms like this offer a *Reset* button, users often accidentally click it instead of *Confirm*. The Bank of Ireland designers notably did not fall into the "reset button" design trap.

To ensure that data stays up-to-date, users—after a pre-determined number of days—are automatically directed to an *Update your details* page at log-in, and asked to take a moment to review their data.

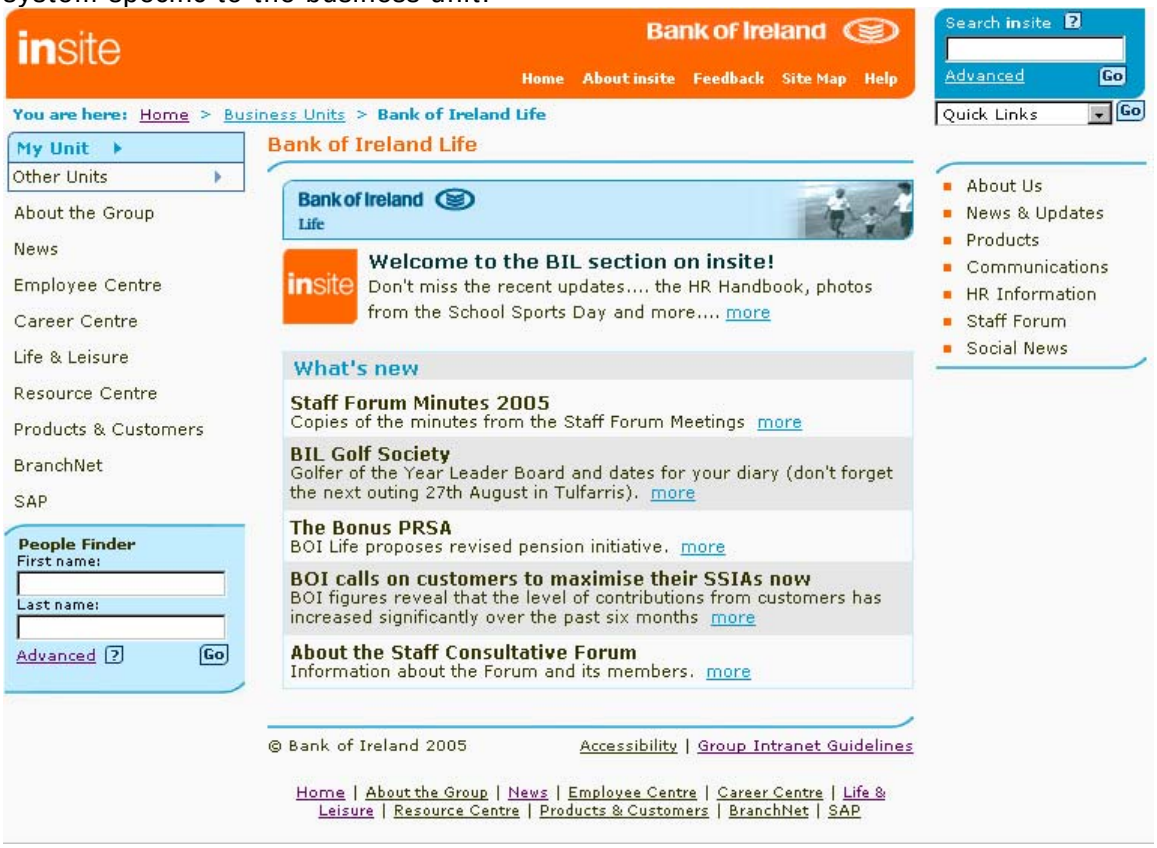


Pictured: After clicking the *Update your details* button, users can update their profile by filling out this form. This page helpfully omits a *Reset* button, which users often accidentally click when they want to *Confirm*.

Catering to Users

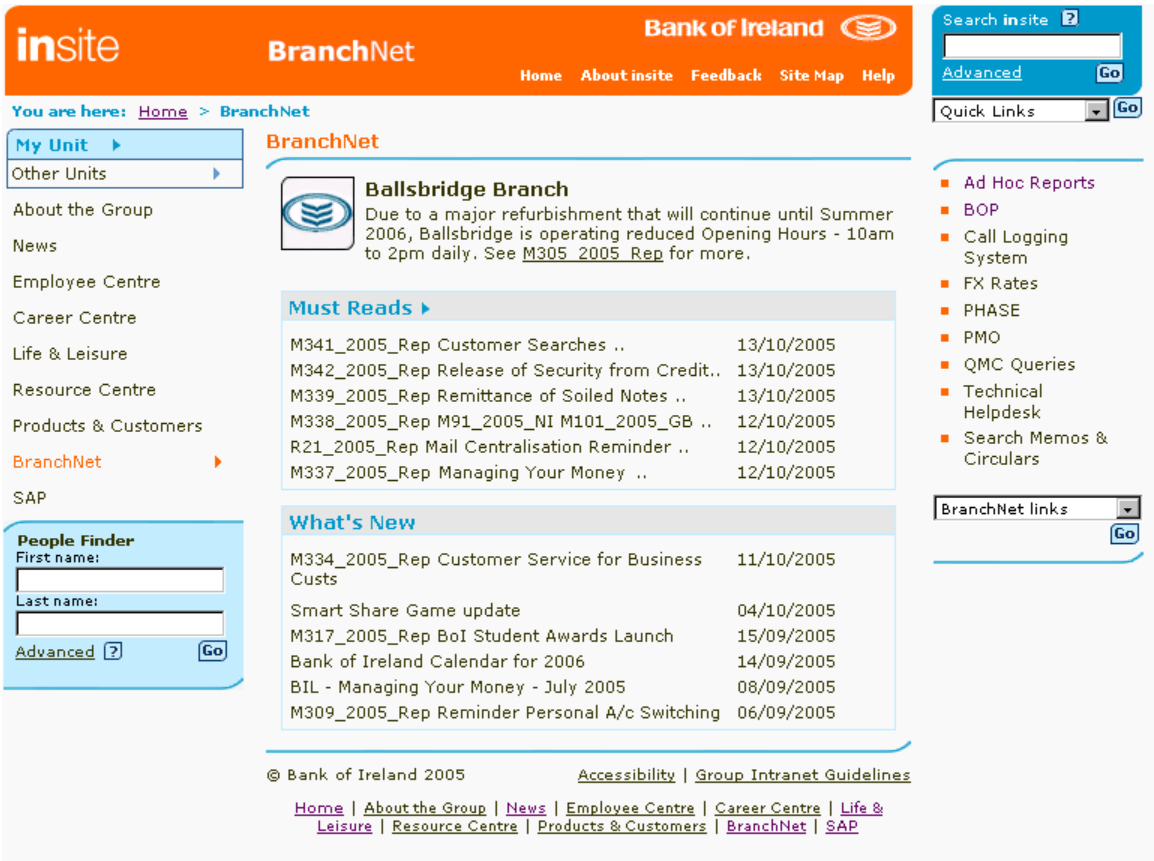
In addition to the features every user knows they want—a sharp homepage, relevant news, and an easy-to-use employee directory—the Bank of Ireland intranet provides employees with department-level information that's relevant to their business unit or job function. Departments with employees in multiple locations often have their own launch areas, too.

One advantage of a *Launch Area* is that it allows for an extra right-hand navigation system specific to the business unit.



Pictured: The *Bank of Ireland Life* page is one example of an individual department's launch page, where its employees can find content written specifically for them.

Another launch area, *BranchNet,* is **in**site's largest department-specific area. *BranchNet*'s specialized content is devoted exclusively to the Bank of Ireland's branch network and includes topics such as branch operating procedures, must-read memos, exchange rates, and an authorized-signature manual. *BranchNet* is also a semi-autonomous part of **in**site, and has its own team of administrators and content publishers.



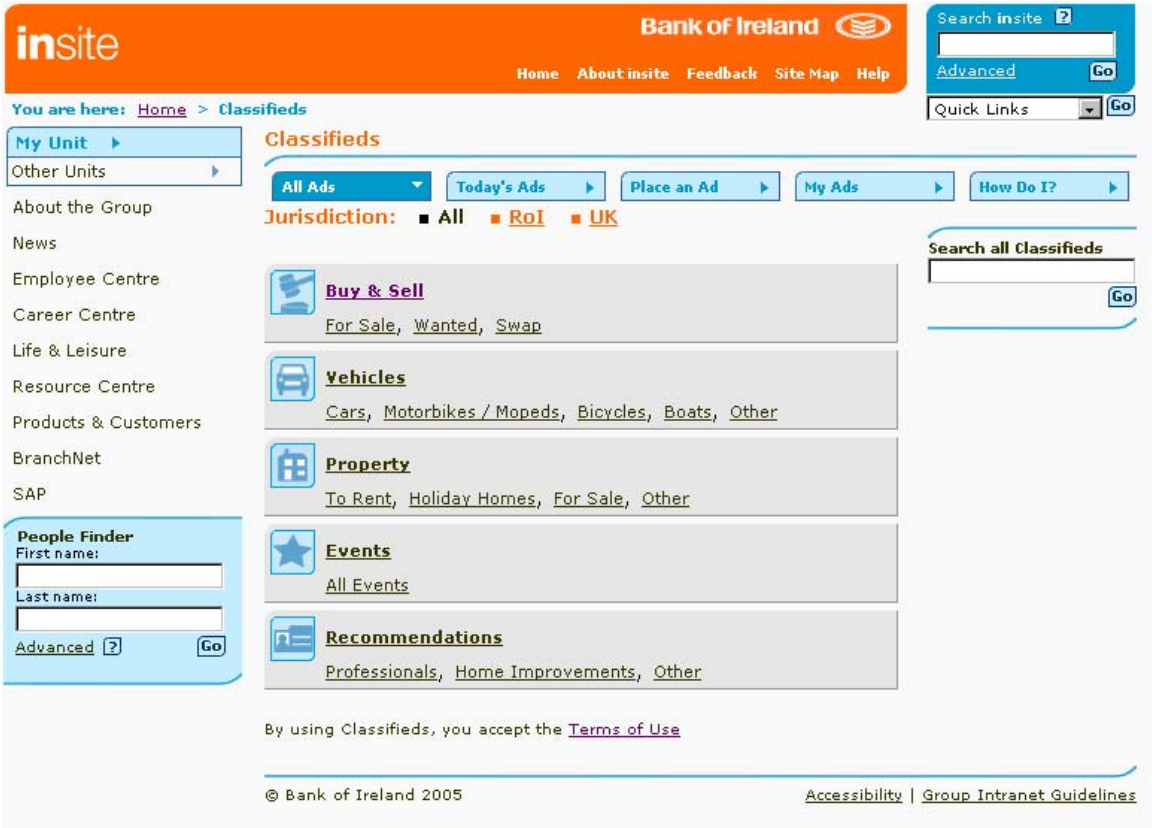
Pictured: Another example of an individual department's homepage: *BranchNet*, where branch staff can find information specific to them, including branch operating procedures, must-read memos, and exchange rates.

The new employees launch page is also useful, containing welcome information and guides to various policies, locations, and procedures.

Beyond features for new employees, another notable trend for intranets is to let employees post and read their own classified advertisements. Many managers and intranet developers realize the importance of work-life balance, and intranet-based classifieds help maintain that balance and provide a relatively safe shopping haven. (It's obviously easier to avoid unscrupulous sellers and buyers when you're dealing with people within your organization. People know where to find you.)

The Bank of Ireland classified interface calls out users' most important classified-related tasks: *All Ads, Today's Ads, Place an Ad,* and *My Ads.* A *How Do I?* button provides quick help.

Beyond the search feature, users can browse classifieds in five top-level topics, such as *Vehicles* and *Events*, plus several sub-topics.



Pictured: While not strictly work-related, classifieds are nevertheless a nice-to-have feature for users, and one that helps draw users back to the portal.

Overall, the Bank of Ireland intranet includes a variety of features—most for business, but some for personal use. All features are packaged clearly and gracefully, providing further incentive for users to regularly return to the intranet and use it as part of their daily work routine.

URL AND ACCESS

The Bank of Ireland Group's intranet address is http://insite.boi.com. "The site is not bookmarked by default in browsers, though most staff members choose **in**site as their default homepage," notes Breffni Wall, **in**site's content and publishing specialist.

When the intranet launches, it automatically logs in users by referencing their PC log-in details. "This feature eliminates unnecessary login screens for users while still controlling access to information published on the intranet," she says. It also allows for behind-the-scenes targeting of information.

Users with remote access to the Bank of Ireland Group network—in particular, sales people—can also access **in**site remotely.

Centralized and Distributed Management

To manage content and publish it to the intranet, Bank of Ireland uses a heavily customized version of Documentum.

In terms of the content itself, the dedicated intranet team maintains information of general interest to the entire Bank of Ireland Group. In addition, each business unit designates its own content publishers to help maintain department-specific intranet content, for which each department alone is responsible.

This arrangement came about for two reasons, says Wall. The first is that "the staff of a given department is best informed as to the relevance, quality, and timeliness of the content that that department wishes to publish." In addition, "given the size and geographic spread of the group, a central team of publishers would have to be large, and yet still couldn't realistically be expected to become familiar with every department's content and publishing needs."

In other words, distributing responsibilities lets each group do what it does best. Departmental content publishers maintain relevant content for their peers, while "the core intranet team focuses on site design, information architecture decisions, and general publishing improvements," says Wall.

The intranet team also keeps a close watch on the homepage. In particular, **in**site's editor has final editorial say over which articles and graphics run on the homepage. This is "to ensure that a group focus is maintained, and to encourage users in all jurisdictions of the group to visit the site," notes Mairead Anderson, **in**site's relationship manager.

Such an approach "allows for the forming and maintaining of an identifiable style on the homepage," she says, regardless of what the individual business units do with their individual launch pages. "Given our devolved publishing process, the other parts of the site may all have different styles or approaches—while staying strictly within **in**site guidelines, of course—but the homepage should have a continuity of style about it."

Maintaining a Consistent User Experience

Maintaining a consistent intranet user experience further involves the core intranet team, since they train all content publishers and seek to foster a sense of community among them. "Central to the success of **in**site's publishing model is the sense of community amongst the 200 publishers across the Bank of Ireland Group," notes Mary Staunton, the internal communications manager responsible for **in**site. To help maintain that, **in**site contains an interactive *Publishers' Forum* where content publishers can ask questions and swap advice.

"We've found that, apart from our centralized publishing team, one of the best sources of help for a publisher is their fellow publishers. Therefore, in the early days we set up a *Publishers' Forum*—a searchable, question and answer database—where publishers can look for answers or ask questions or just post tips for their fellow publishers," says Mick O'Farrell, editor of **in**site. While the forum is currently a Lotus Notes-based application, Bank of Ireland plans to soon make it an intranet-based application.

Content publishers help each other out. “More experienced publishers provide guidance and pass on useful tips to novices,” says Staunton. Over time, a repository of tips has also built up, providing a useful knowledge base for all publishers.

Then, to actually publish content, publishers use “pre-defined templates designed by the intranet team in consultation with the relevant business units,” says Wall. “The Web-based publishing tool lets them add text, create links, and select and align images in just a few simple clicks, without having to worry about the layout of the page.”

Templates ensure a consistent user experience for all employees. “The layout and design are consistent for end users no matter where they are on the site,” she says. The CMS also adds several standard elements to content as required, including inserting sub-headlines with “back to top” links and even a table of contents.

Before a page gets published, however, it must first go through a review and quality-assurance process. Typically, this involves vetting by one of a business unit’s designated content approvers.

Content Updating Requirements

All content must also be updated on a regular basis. To ensure that happens, O’Farrell says Bank of Ireland employs a two-pronged approach. “Firstly, the content management tool we use, Documentum, will send out automatic notifications in advance of a piece of content’s expiry date. The user can then update the content and amend the expiry date, or let the content be automatically archived.”

The automatic Documentum emails warn users that if their content expires, it will be automatically removed and archived. “This ‘publish or perish’ policy clearly places the responsibility for ongoing maintenance on the content owner,” notes Wall. “It also enshrines the task of intranet publishing as a key work activity and ensures that publishing does not slip to the bottom of a publisher’s work list.”

Once revised, content can be set to expire after a certain number of months, up to one year. “We felt that this was the best approach, even for content that may be relevant for longer than twelve months,” says O’Farrell, “since it means that every piece of content must be reviewed, refreshed, or removed at least once a year.”

The intranet team, however, doesn’t just rely on automatic expirations. “We carry out manual checks on content—some targeted, some random—and if an area is starting to look dated, we’ll request that the relevant publisher review their content,” he says.

TECHNOLOGY

The Bank of Ireland Group intranet is based on a J2EE architecture (a version of Java for developing and deploying enterprise applications), and runs on three Windows 2000 Professional servers, load balanced using a BIG-IP appliance from F5 Networks. “Each server has two instances of Apache Tomcat installed, which are also balanced using BIG IP,” says Niall O’Callaghan, a senior Web developer. “We use an MS SQL 2000 database for storing content metadata and application data, and use Apache Lucene to index the site and provide search functionality.”

For tracking site problems and running tests, they also “hook into Mercury TestDirector 8 from within sections of the site to collect feedback from staff and manage their comments through our change process,” says Conor Hawkshaw, a senior Web developer.

The team's Documentum CMS includes a content server, which stores and controls content, as well as Web Publisher, which provides a Web-based interface for the group's publishers to create, edit, manage, and publish content using pre-defined templates.

With Documentum, "content is stored as XML, and not HTML as with our previous solution," notes O'Callaghan. "Using XML, we have more flexibility in terms of the presentation of data." In particular, when content publishers submit new content, they're inputting that content into an XML template. Then, "using XSL style sheets, we transform the XML into various types of media, including HTML, JSP, PDF, JPEG, and GIF formats." Two additional advantages of this approach: it's scalable, as well as future-proof, so the intranet team can "expand into other media when the opportunity arises."

The content server, which is based on Java technology, runs on an AIX Platform with a slightly customized Oracle database. "We installed additional components like a breaking news feed, some custom workflow methods, and a replication job for Documentum to interact with LDAP—our centralized user database within the group," notes Hawkshaw. The additional components were written in Java, and are managed using the Apache Tomcat program.

With the J2EE-based Web Publisher, however, the intranet team heavily customized it to meet business requirements. "Documentum provides a Web Development Kit which can be used to customize Web Publisher, and we spent a few months at the start of our project working on this," says O'Callaghan. In particular, "we wrote custom workflow methods to control the flow of content throughout the organization."

The content server and the actual Web Publisher administrators maintain content-related security, ensuring proper controls for and permissions on the content that publishers can edit, approval groups can approve, and so on. This permissions-based system is maintained automatically based on users' credentials. "A custom job imports basic security credentials from LDAP," notes Hawkshaw, then "the site makes use of NTLM [Windows NT LAN Manager] to automatically authenticate users against LDAP, based on their Windows Network account details."

For maintaining the site, developers and authors use a range of tools, including Documentum for adding site content, WebSphere for making application code changes, and Dreamweaver MX for all other changes. Photoshop and Illustrator are the tools of choice for creating and editing images. Finally, Test Director manages bugs, changes, and the overall quality-assurance and release-management process.

GOALS AND CONSTRAINTS

Goals:

- Enhance Bank of Ireland Group's competitive advantage by delivering the right content, to the right end user, in the right format, at the right cost.
- Ensure that the intranet continues to be the primary medium for the delivery of group and business unit (departmental) communications, thereby preserving and enhancing organizational knowledge and strengthening organizational relationships and communications.
- Continuously improve employees' workplace experience, while improving employee performance and job satisfaction.

- For the intranet team, introduce a more flexible solution that: allows greater day-to-day control over site maintenance without requiring skilled IT resources; and also allows key people to focus more on areas best suited to their skills.
- For publishers, improve publishing tool performance, simplify the overall process, and guarantee publishing times.
- Better target content based on a user's business needs, via their business unit (department) launch areas.
- Continue to roll out new and enhanced intranet applications.

Constraints:

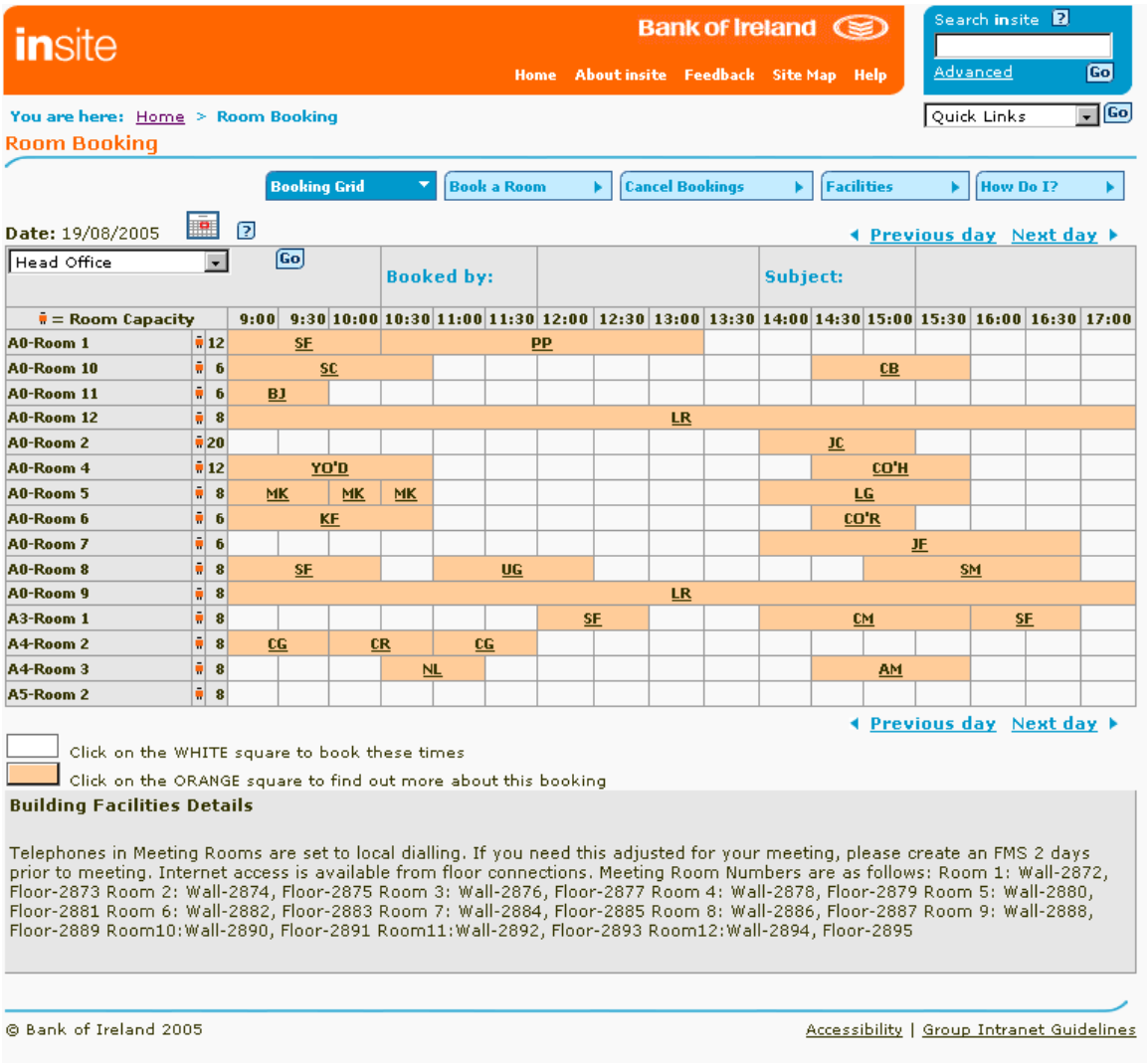
- As with any system used by thousands of people, designers had to keep the lowest common denominator in mind, which can over-generalize the intranet. At the same time, very PC-literate users expect continuous enhancements.
- Varying PC specifications existed across the group (a large-scale project is now under way to improve and maintain the technology standards).
- Costs had to be justified in advance, and throughout the project.
- A wide range of interested parties had to be kept on board and committed.
- There was pressure to maintain previous investments and simply upgrade the existing content management tool (though a later business evaluation proved there was nothing to be saved by keeping the old tool).

BASIC INTRANET FEATURES

When it comes to intranet features, "there probably aren't any features on **in**site that haven't already appeared on another intranet, however, what we were aiming for, and what we feel we've achieved, is a successful blend of features," notes Staunton. "Obviously we've included the 'must-haves,' but from the beginning we were determined to include some of what we called the 'nice-to-haves.'"

While must-have features are essential for doing their job, nice-to-have features entice employees to return regularly, which is essential. As she notes, "one measure of the success of an intranet is how often staff log on when they don't necessarily have to." From a business perspective, frequent logging on is a good thing: employees are less likely to miss important communications, or general information about their colleagues and the Bank of Ireland Group itself.

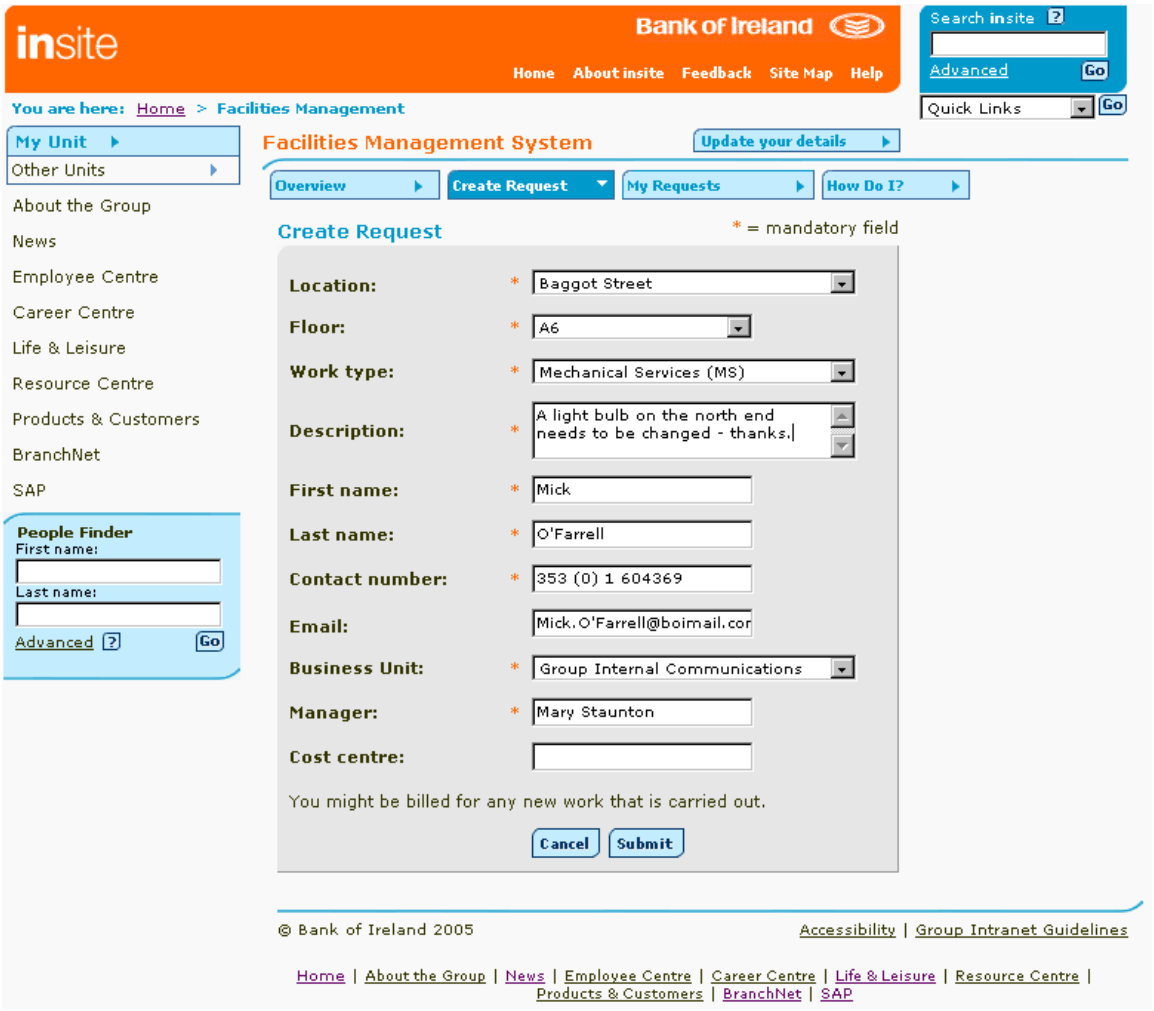
Must-have intranet features include: placing the most important Bank of Ireland Group updates and announcements on the homepage, as well as offering homepage links to other departmental communications. Meeting room booking is also extremely popular. "Users can see an entire day's bookings for all meeting rooms in listed locations before choosing and reserving a room for themselves," says O'Farrell. Canceling a booking is also easy.



Pictured: The room booking tool. Users can see an entire day's bookings for all meeting rooms in listed locations, before choosing and reserving a room for themselves. Canceling a booking request is easy, too.

Other popular and often-used features include *People Finder*, for finding employee information, and a listing of internal career opportunities, which is searchable by location, jurisdiction, department, and job type.

If a light bulb needs changing, employees head to the *Facilities Management System*. "Staff in many of the group's buildings can raise a work request via the intranet—if, for instance, furniture needs to be moved, or a spillage needs to be cleaned, and so on," notes O'Farrell.



Pictured: The front page of the *Facilities Management System*, where employees can make premises-based work requests.

Finally, employees can manage purchasing and procurement by accessing the SAP ERP (enterprise resource planning) system via the intranet. Employees can also use the SAP system to review their expenses and remaining vacation days.

Beyond must-haves, one nice-to-have site feature is breaking news. “An external news feed provides up-to-the-minute business, national, international, sports, and entertainment news. The homepage will scroll six headlines from a chosen category at a time, but users can click through for a full list of the breaking news that day,” says O’Farrell. The *Life & Leisure* section—which includes sub-sections on health, sports, and the Bank of Ireland Arts Center—is also popular, as are the classifieds, where users can buy, sell, or swap items. “This is obviously a non-business-critical application, but its popularity makes it worth maintaining,” he says. Finally, opinion polls—both on serious and light topics—occasionally run on the homepage.



Pictured: For variety, the intranet team occasionally runs an opinion poll on the homepage (at right side, center), such as this question about employees' SSIA (Special Savings Incentive Accounts).

One interesting aspect of the bank's intranet is that for some staff members, it's their only workday source of online information. "Not all staff have Internet access in the workplace. Therefore, for a significant number of staff, accessing **in**site is their means of keeping up-to-date with not just group or departmental news, but with other news in general," notes O'Farrell.

Despite the range of features, designers are careful to keep users of all abilities in mind when designing and upgrading the site. "A particularly important feature of the intranet, overall, was its accessibility to users of all abilities. This was incorporated into the design and implementation at all stages, and tested at regular intervals. The result is that an assessment by an independent intranet usability consultancy was able to report that **in**site 'has achieved a high level of accessibility,'" notes O'Farrell.

Individual department launch areas are offered so that "staff in that department can access information specific to them," says O'Farrell. "The largest of these areas on **in**site is the *BranchNet* area—an area devoted exclusively to the Bank of Ireland branch network, with its specific needs and more specialized content. *BranchNet* is semi-autonomous within **in**site, with its own team of administrators and content publishers." Some of the content contained in *BranchNet* includes branch operating procedures, must-read memos, exchange rates, and an authorized signature manual.

For gauging the intranet's success, creating launch pages such as *BranchNet* were important milestones. "The successful adoption of **in**site as *BranchNet*'s communications tool was a very important result for us as a team, and indeed for the group as whole," he says. "Not only does it epitomize the use of **in**site as an

essential operational support, rather than a 'soft' communications source, but it also illustrates the confidence of the wider business in the intranet overall."

USERS

The intranet is accessible to 17,000 Bank of Ireland Group employees in multiple countries: Ireland, the UK, France, Germany, Australia, Canada, Japan, and the US.

Users hail from a variety of financial disciplines. "As a diversified financial services group, our intranet's users work in the personal, commercial, industrial, and agricultural finance sectors," notes Staunton. "There are also the normal ancillary operations, including administration, human resources, technical support, and marketing."

All users have intranet access, while only some have Internet access, making the intranet a valuable source of information—relating to the bank or otherwise—throughout the day. Currently, employees' infrastructure needs are being readdressed. "A project is in place at the moment which will see all staff having Internet access in the coming year," notes O'Farrell.

USER TASKS

- Read news and general communications about the organization as a whole and particular business units
- Access must-read communications, including memos, updates, and circulars
- Search for policies, downloads, forms, contact details (individual or departmental), internal vacancies, social news, career resources, press releases, press clippings, and marketing information
- Access personal banking applications
- Reserve meeting rooms
- Submit premises-based work requests
- Access national and international breaking news headlines
- Research exclusive staff discounts on products and services
- View classified ads posted by colleagues

BACKGROUND

The Bank of Ireland Group intranet launched as part of the organization's move to "go digital" in 1999–2000, says O'Farrell. "The need for a group-wide, computer-based method of communications was recognized—one which would not only be a repository of essential information, but which would become the primary medium for the delivery of group and business unit communications, thereby preserving and enhancing organizational knowledge, and strengthening organizational relationships and communications."

In short, the organization wanted a single, group-wide intranet, and launched a project accordingly in early 2000. "The result, **in**site, was piloted in 2001. Then, over the next 18 months, **in**site was rolled out to increasing numbers of departments and jurisdictions, and was fully group-wide by 2003," he says.

The intranet grew quickly. "Since its launch, **in**site has gone from being a small site with a small audience to a large, high-volume site, accessible to, and accessed by, the group's 17,000 employees," says Staunton.

Two years after the intranet's launch, however, much of the technology underpinning it needed updating. Indeed, "the technical limitations of the original solution placed huge constraints on the future success of the intranet," notes Wall. "Simple design changes required complex and time-consuming development work, causing unnecessary and embarrassing delays." For example, just changing the name of a major group division—following a corporate restructuring—took a whopping 14 days, accompanied by costly development efforts.

Publishing was also needlessly complex, and slow. As a result, "publishing activity waned," she says. Increasingly, business units called on the intranet team to update their content, shortchanging time for ongoing site improvements.

Given those problems, "it became increasingly difficult to explain the benefits of a group intranet with out-of-date information and a tired design to senior management and colleagues," says Wall.

DESIGN PROCESS AND USABILITY ACTIVITIES

Business Case

The initial intranet redesign started as soon as the Bank of Ireland Group's internal communications team assumed full responsibility for the intranet, and one of its first decisions was to replace much of the existing intranet technology. First, however, it had to convince senior management. So, "the first phase of the project focused on building a business case for the replacement of the original site based on reducing the overall operating costs," says Wall.

The intranet team first examined the existing operational model, application architecture, and technical architecture, then generated a full breakdown of all intranet costs.

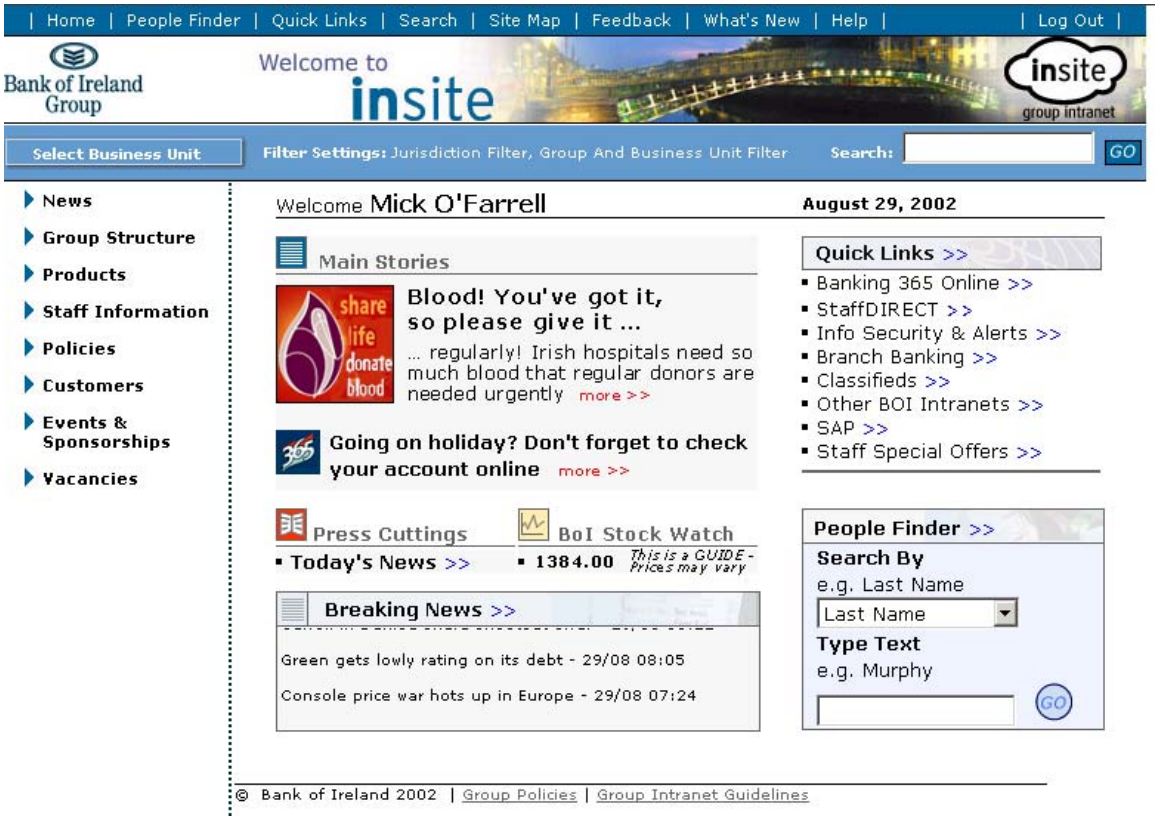
Simultaneously, "the intranet team detailed intranet and publishing tool business requirements, generated both through user feedback and various usability reports. Then, the specifications were verified with various areas of the business and prioritized by the business team to determine the scope of the project," says Wall.

The end result: "a clear picture of the desired solution, as well as estimates for its implementation and ongoing operation at a reduced cost," she says.

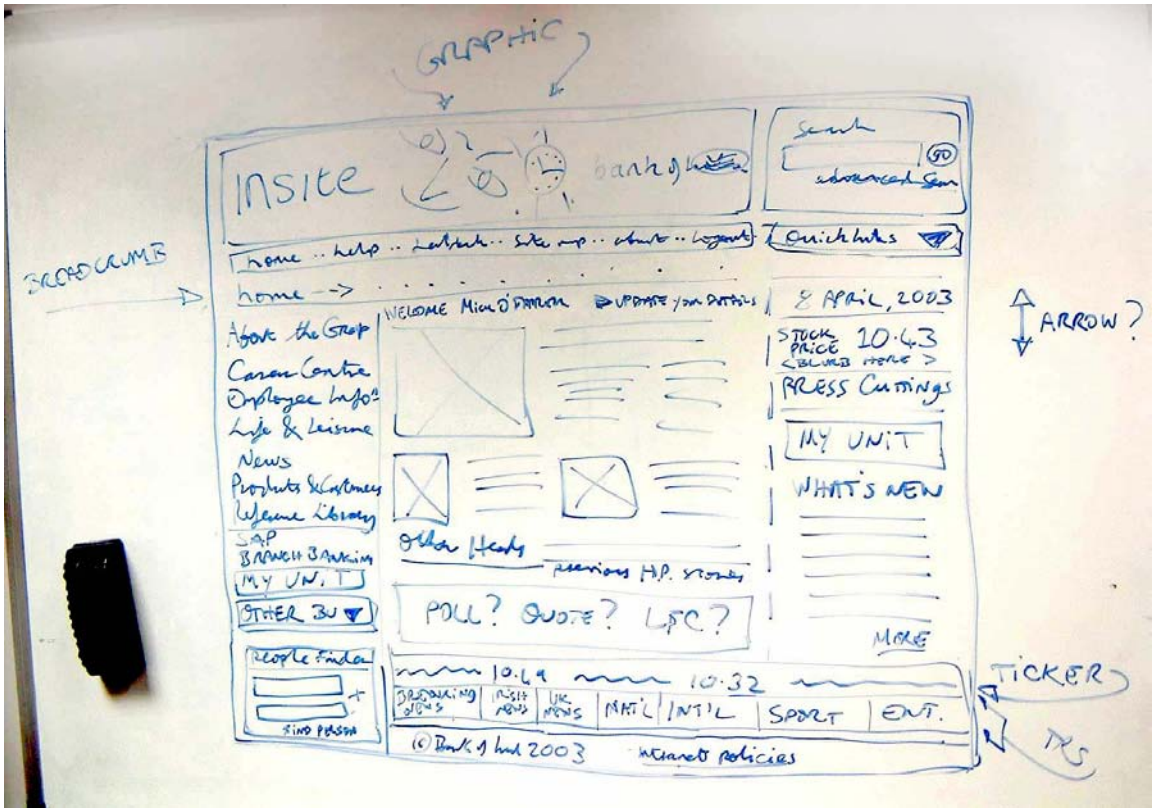
Proof of Concept

Once the business case was approved, the redesign team began creating a proof of concept to vet the new technology, and also try to show that the new approach would offer "real business benefits," says Wall.

The new site's user experience was of especial concern. "The team wanted to strike a balance between the group-wide view and the user's own business unit," notes Wall. "Both perspectives had to be incorporated and immediately accessible from the homepage and across the site." So, the design team introduced the *My Unit* concept.



Pictured: The previous version of the intranet homepage.



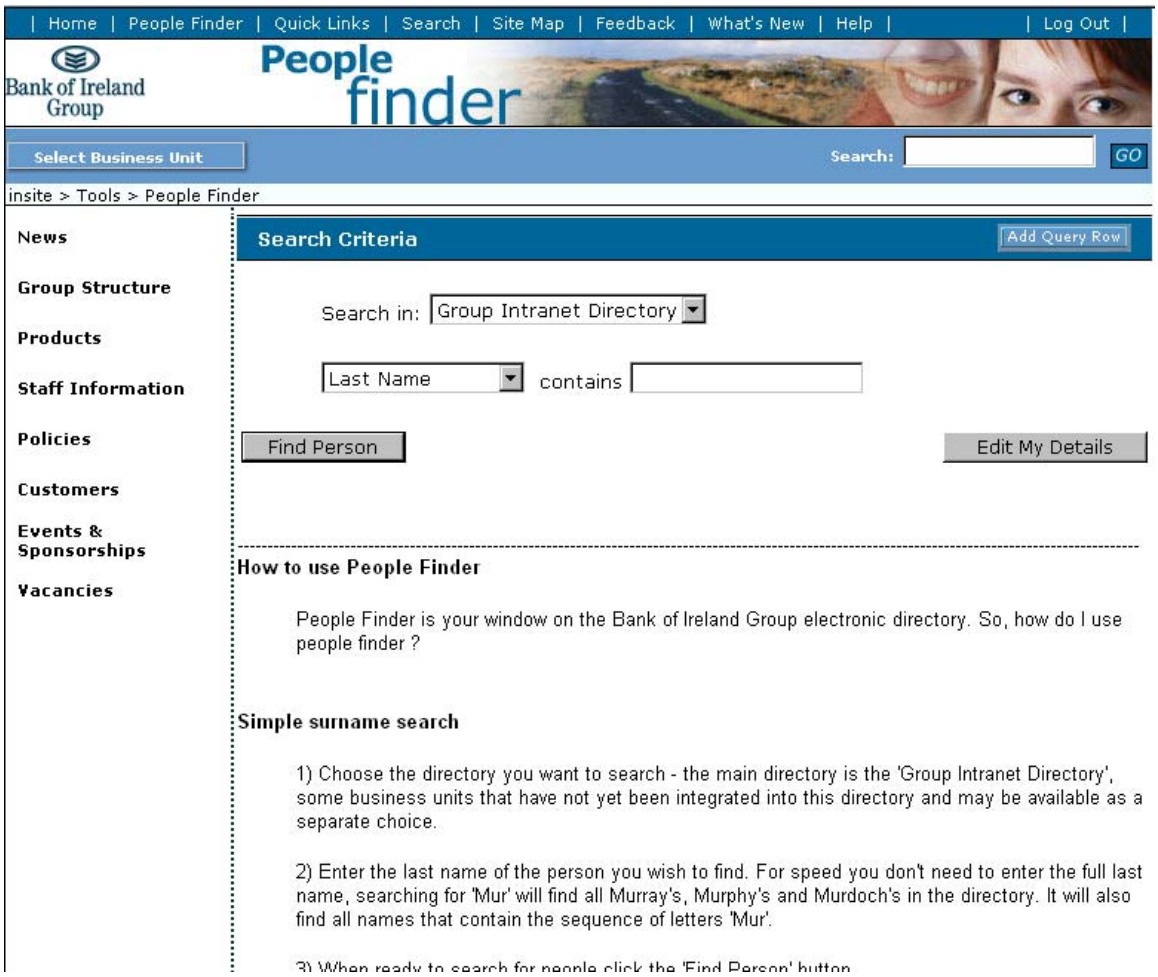
Pictured: One of the redesign team's first projects: creating a new intranet homepage. One notable change is the new balance between whole-organization communications and a user's own business division (*My Unit*).



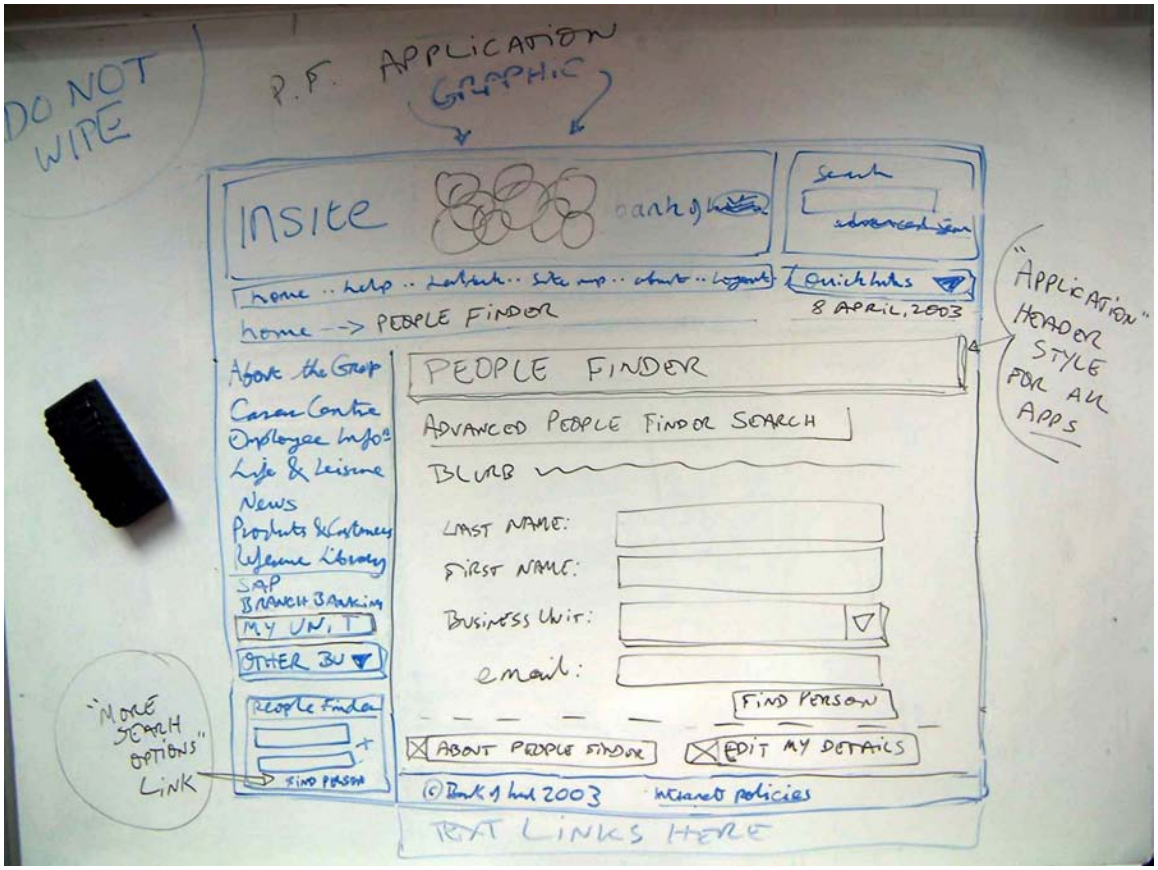
Pictured: The new Bank of Ireland Group homepage provides ready access to *My Unit*. Note that this user-tested, finished version strongly resembles the designers' above mockup—"a testament, I think, to the experience and 'audience-awareness' of the core **in**site team," says Bank of Ireland's Mick O'Farrell.

The redesign team spent considerable time researching publishing tools, since the new site would ultimately succeed or fail based on the chosen tool's effectiveness and user-friendliness. This research validated the team's initial choice: Documentum. In particular, the team thought Documentum's distributed publishing capabilities would help "empower content owners to create and update their own content," and thus give intranet content a needed revitalization.

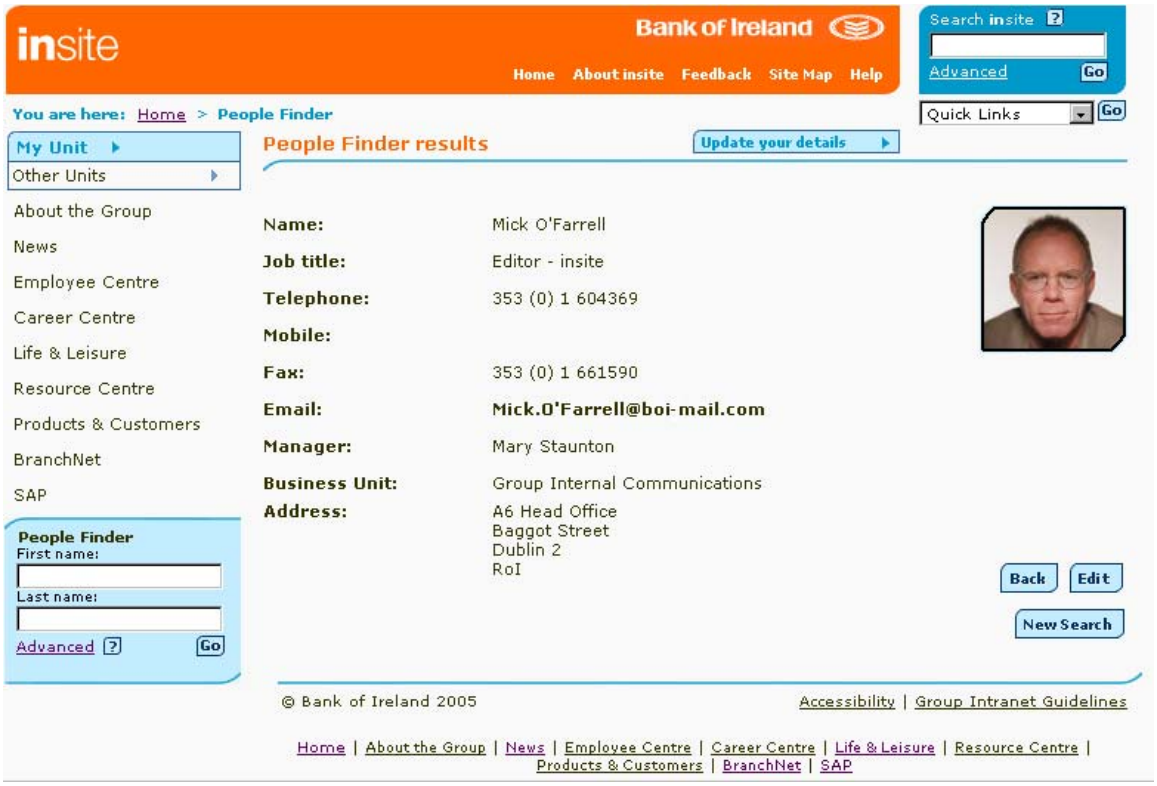
During the proof-of-concept phase, the team found that task-based user scenarios were a useful design technique. "Learning from past mistakes, the project team drew inspiration from usability research and best practices to set the direction for the redesigned site," notes Wall. So, "the team drafted mock-ups of applications based on user tasks and revised the designs based on expert reviews as well as user consultations."



Pictured: The previous version of the intranet's *People Finder* application.



Pictured: The **in**site redesign team's concept of how the new *People Finder* application should look. After undergoing usability testing, the mockups proved extremely useful for the graphic designers and developers who actually had to design and code a finished product.



Pictured: The new version of the *People Finder* intranet application.

Design

The next phase involved finalizing all aspects of the new design. For this, users were integral, and the redesign team brought in a cross-section of people for card-sorting exercises, design sessions, and prototype testing. According to Wall, "early versions of the site were tested in usability sessions with fresh faces from across the group, including branch network and call center staff" and team members used the results to iterate the design. They also recruited business unit champions and representatives.

Wall says that studying user behavior was especially important for smoothing any rough edges in the new site structure. One really helpful result, for example, was discovering where staff "expected to see links to content in different areas of the site."

As part of the redesign, designers kept accessibility in mind and complied with the Web Accessibility Initiative (WAI) Guidelines. In particular, they included access keys and keyboard shortcuts to aid navigation. "Considerable effort went into designing and creating a page structure that would scale to accommodate different sizes of text," notes Wall, which let users magnify text while still maintaining the overall page structure.

The intranet team also brought in a local usability consultancy to evaluate the prototype. "The team gained valuable insights from this evaluation, as it offered a refreshing, outsider's perspective on the design," says Wall. "For example, headings and labels were improved by stripping out company jargon that would not make sense to new entrants to the group."



Pictured: The site map for Bank of Ireland's intranet, post-redesign. A variety of usability techniques, including card sorting, helped the redesign team create the final information architecture.

Build & Test

Next, the redesign team built and tested the new intranet. Doing this required creating cross-functional technical, design, editorial, and business staff teams, composed primarily of in-house employees, as well as such business partners as HP, Accenture, and Documentum. This covered application development, plus implementation of the technical architecture and the content management software.

The team subsequently conducted "comprehensive business testing" as well as "further user and accessibility tests," says Wall, to further tweak functionality and excise usability flaws.

Then, on the content front, "the editorial team spent time simplifying and honing copy text, error messages, and confirmation messages, to make them as intuitive as possible for the typical non-technical business reader," she says.

Rollout

With the redesigned intranet built, rollout progressed on two fronts.

First, the intranet team ran a series of seminars and released a new content-publishing guide to acquaint publishers with the new publishing tool. Then, "the process of content migration began, during which publishers reviewed site content and re-published content using the new tool," says Wall.

It was not just a coincidence, she notes, that these efforts gave the intranet team "an opportunity to purge the site of outdated and redundant content" and focus on presenting the right content, rather than on maintaining a "multitude of jumbled pages. Less was definitely seen as more, as long as staff had essential information from day one." That said, the team migrated essential and large volumes of information whole, using automated tools.

While publishers migrated content, the development team polished the intranet technology. Then, with launch imminent, "an eleventh-hour breakthrough in providing automatic login to group staff, based on their PC login details, delayed the overall launch," says Wall. Still, the trade-off was worth it. "Making it easier for staff to access the new site is always more important than any project milestone."

In January 2005, the new intranet launched as a pilot for a small number of staff members, and the intranet team began gathering feedback and revising the site. "The reality of implementation threw up some interesting glitches along the way and necessitated some fast thinking from the team. In some cases, for instance, incomplete user details had to be updated to facilitate the new automatic login process," says Wall. Even so, the team soon had the problems ironed out.

There was only one final prerequisite for fully launching the site: support teams had to be trained on the intranet's new features. "To accommodate this, a formal handover from the project team to operational teams was part of the project exit criteria," notes Anderson.

TIMELINE

- January 2000: Launched a program to create a single, integrated Bank of Ireland Group intranet.
- February 2001: The board of directors approved continued intranet rollout, and strategy and infrastructure work began in earnest.

- August 2001: Launched a pilot version of **in**site for a limited number of business units.
- November 2001: Following a successful pilot, the intranet rollout expanded to include departments across the group, and included efforts to promote **in**site as the sole intranet for the entire Bank of Ireland Group.
- February 2002: Based on feedback from staff, **in**site underwent a quick facelift, involving minor changes and a new color palette.
- June 2002: The corporate communications department assumed responsibility for **in**site.
- February 2003: Launched first major **in**site redesign project to make the site faster and easier to use, improve available tools and applications, make the site follow new brand guidelines, and offer new publishing tools.
- Late 2004: The intranet team became part of Bank of Ireland Group's HR "culture and engagement" unit.
- March 2005: After a short pilot, the redesigned intranet launched for 17,000 Bank of Ireland Group employees.

RESULTS

The new version of the intranet launched in March 2005, with notable improvements. "For end users, the redesigned intranet is faster and much easier to use," says Wall. "Employees know where to find key information or can easily locate what they are looking for using search." Previously, most employees would ask a colleague for information; now people look to the intranet first.

Thanks to the redesign, intranet applications got a needed speed boost. "The room-booking system was notoriously slow on the old site. Staff tended to book rooms for longer periods than required and never bothered to cancel rooms. This inevitably led to inefficient use of meeting room facilities and, for such a basic office requirement, was hugely frustrating for users," she says. By contrast, the new tool runs much more quickly, and is substantially easier to use. Not surprisingly, "there is huge, group-wide uptake of the tool, and new locations are constantly being added."

Other new tools are less business-oriented, but no less important for building a strong sense of community. The classifieds section, which contains "everything from wedding dresses to plumber recommendations," says Wall, is one such example. "It is a real draw for staff and keeps them coming back on a daily basis." The intranet team might also unveil seasonally themed homepages or group-wide opinion polls.

Such improvements continue to foster increased intranet use. Overall, 75% of Bank of Ireland Group staff access the intranet at least once a week, and many access it much more, with only 5% visiting just once per month or less. "Interestingly, statistics show that staff are checking the site more than once during the day," notes Wall. "This tells us that staff now have an appreciation that the site's content will change during the course of the day."

New content tools also make life easier for publishers, since the more self-explanatory content interfaces necessitate less training. "New publishers can be trained in an hour, and can then join the interactive *Publishers' Forum* on day one of publishing," notes Wall. Much of the credit here goes to designers' redesigned templates, which are now easier to use and thus let publishers "concentrate on the content."

That's led to some welcome results. "Business units are lining up to increase their presence on the site and take ownership of their content, now that the process is so simple," says Wall. Indeed, "as a business activity, publishing is now viewed much more positively than before."

The redesign also gives designers room to grow since the intranet has been "cleverly designed to cope with future redesigns," notes Wall. For example, changing a division's name on the intranet now takes only minutes, and once new content is ready, completely new sections of the site can be added in about a day.

Employees have shared their enthusiasm for the new site. For example, one employee—a Belfast-based business banking manager—sent this feedback: "The new format for **in**site is fantastic. It is so much easier to navigate or find forms and get to what you want to quickly. It's a huge improvement on the old site." Others raved about single sign-on, and one employee praised the new room-booking system in no uncertain terms: "Gone are the days of swearing at a near-impossible process."

Despite the recent, major redesign, regular but smaller redesigns continue. One detail here is especially noteworthy: the bank's redesign team remains intact. "The intranet team started life as part of the initial intranet rollout project team, and is largely composed of the same people now as it was then," notes Staunton. "This is important to note, as the continuity of the team meant that the vision for the intranet was constantly reinforced during the redesign phase."

Going forward, the intranet budget continues to cover five full-time employees, plus all costs relating to running training and refresher courses for content publishers—annually, approximately twelve courses with five participants each. The budget also covers costs for maintaining an intranet call center for employees, staffed with a dedicated support team, and maintenance of the site's infrastructure and applications.

The intranet team continues to regularly improve the site, drawing on a variety of internal and external sources. For example, "the relationship with a local, independent usability analysis group—called AMAS—has continued through a series of quarterly external site audits," says Wall. "Their constructive criticism and practical recommendations have given the team food for thought, and plenty of suggestions for improvements."

The intranet team also continues to solicit employee feedback. In particular, "the internal communications manager and the relationship manager conduct business unit visitation programs to encourage intranet usage and to seek feedback on how to improve the intranet experience for users throughout the group," says Anderson.

Also, the new publishing tools will be getting a shakedown in a series of publishing master classes. The goal is not only to enhance content quality, but also to identify how the tools can be improved. In addition, publishers are being asked to contribute new types of information to help readers. "A 'related links' feature is being introduced on a phased basis across all content templates," says Wall. When submitting content, publishers are being encouraged to provide groups of links to other relevant intranet pages.

LESSONS LEARNED

Insight from Mary Staunton:

Secure your business backing before proceeding. "It's important that the project be 100% driven by the business owners of the intranet. They must be in

control at all times. Otherwise it's extremely easy for the various strands to get out of control and out of sync."

Insights from Mick O'Farrell:

Take time to do the job right. "Allow sufficient time to do the job right, before it's even started. Abraham Lincoln is supposed to have said, 'Give me six hours to chop down a tree, and I will spend the first four sharpening the axe.' I'd advise adding at least another hour, to make sure you're chopping the right tree. For example, during our intranet redesign, in the name of efficiency, different teams were testing different parts of the implementation. At several points, however, one team would finish testing a block of code and raise bug reports, only to find that a separate team of developers had already moved on to the next block of code. This led to some wasted time, since those developers sometimes had to re-work their code, based on bug fixes for the original block. In hindsight, the solution would be to commit from the start to a linear process: design, develop, test, repeat. This will always seem like the longest approach, but will usually save time in the final analysis."

Have a dedicated group of code testers. "If the budget allows—which it almost never will—then a dedicated team of testers would be a big advantage. They'll become familiar with what they're testing, and will therefore more quickly re-test bug fixes and spot errors in new implementations. This arrangement would also free the other teams to concentrate on their own areas."

Make centralized content-approval processes obsolete. "At the beginning of the intranet project, we created a central content approval [CCA] process to vet all content, to ensure publishers were following guidelines. It seemed like a good idea at the time, but quickly became a rubber-stamping exercise and wasted a lot of time; we dropped it. Nevertheless, it may have been a good idea, but only for a very short, initial period. So, if a company is considering introducing a CCA-type step to help ease publishers into the publishing process, then set a very definite time limit, after which the CCA process gets withdrawn."

Encourage feedback. "The value of encouraging feedback throughout an intranet's lifetime cannot be overestimated. A significant part of our redesign was driven by the feedback we'd received over the previous years, and there's no bigger body of testers than a site's actual users. It's also essential, of course, that the intranet's feedback-submission mechanism should be easy to find and easy to use. If it's not, you'll never hear about it, you'll only notice a lack of feedback—which can never be taken to mean you're doing everything right."

Ensure project team continuity. "An aspect that we grew to appreciate was the importance of—as much as possible—keeping the same personnel on the teams as the project proceeded. Of course, some staff were redeployed over the project's lifetime, but keeping the same people meant that significant time and effort were saved by not having to bring new people up to speed."

Don't carve release dates in stone. "Having pre-determined release dates is always a good idea, since it helps focus minds and concentrate team efforts, but we found that it was important that these dates have a small amount of flexibility built into them. Given the complexity of the project, it just wasn't realistic to threaten collapse for the sake of a missed day or two, and so we learned to be careful to manage expectations."

Capital One

Using the Intranet:

Capital One is a cutting-edge company for the Information Age, offering credit cards, auto loans, home loans, small business products, healthcare financing, and savings vehicles. Started as an independent company in 1995, Capital One has quickly risen to the top of the US financial services industry, with 48.9 million customers worldwide and managed loans totaling $83 billion.

Design Team:

In-house, HP Consulting, Object Systems Group (OSG), Aquent, Deloitte

Members:

Capital One: Linda Feller, portal usability specialist; Sandra Hennet, Web project manager; Catherine Murphy, portal content lead; Van Ngo, IT technical designer; Macon Pegram, IT technical designer; Rebecca Pratt, portal design lead; Christine Sauer, content process manager; David Sequeira, portal usability lead; Molly Wenzler, IT business systems analyst; Elizabeth Woodward, portal technical lead; Brian Gruber, the director of portal and productivity; Catherine Murphy, group manager for portal content and usability

Aquent: Julia Batum, Web designer; Brodie Rich, senior Web designer/information architect

HP Consulting: Janet Beyers, portal consultant

OSG: Gordon Lundy, information architect; Gary Marshall, information architect

Deloitte: Eric Wazorko, project manager

SUMMARY

Many intranet designers possess both design ingenuity and aesthetic mastery. Yet one skill is less common: the ability to take a task-based approach to design. The designers of Capital One's My One Place intranet have this gift. Throughout the site, designers concentrate on users' tasks and giving them what they need, when they need it. Further, the labels are straightforward: the designers resisted the lure of catchy phrases and obtusely named "features" or "wizards."

Homepage

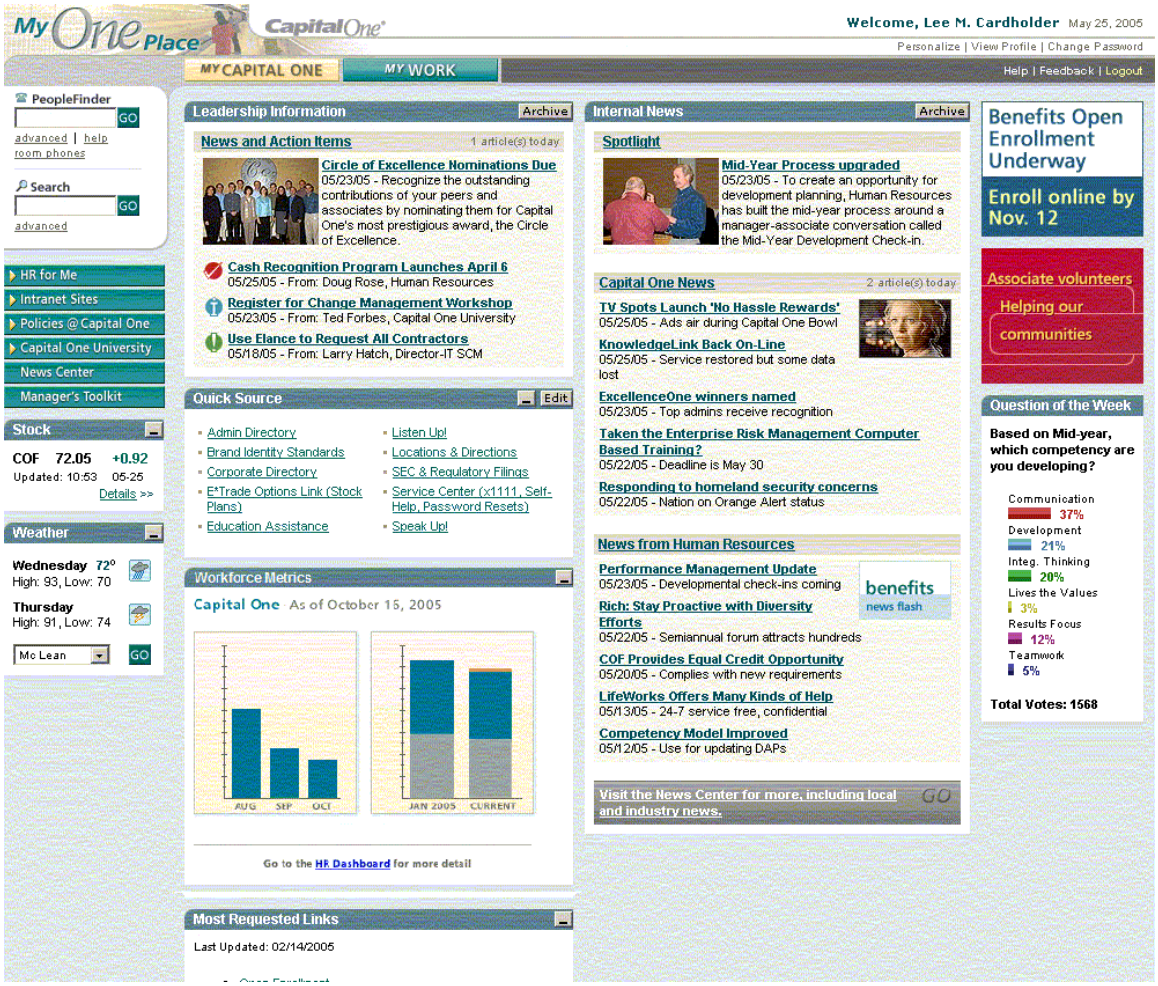
If you work at Capital One, the My One Place intranet portal page is the place to be. On this single page, employees can view news from several sources and communications from Capital One executives. The latter appears in the well-placed *Leadership Information* section in the upper-left part of the page. That's an important piece of homepage real estate, and Capital One makes the most of it, using the space to list everything from bonus and awards information, to announcements encouraging employees to take advantage of tools, training, and other offerings.

Also on the homepage, the *Internal News* section houses *Capital One News*—from corporate communications—and the aptly named *News from Human Resources*.

Meanwhile, subtle advertisements appear in the upper-right part of the homepage. These ads remind users to do things such as enroll in benefits or volunteer in their community.

Other features include a stock ticker and weather reports. While a stock ticker wouldn't be suitable for every intranet, it is quite appropriate for financial services companies such as Capital One. These items are located in the lower-left part of the homepage, in a position that is easy to find, yet not intrusive.

Overall, the homepage is a customizable workspace, affording users easy access to many important features located throughout the rest of the intranet.



Pictured: The Capital One intranet portal's homepage offers employees a variety of relevant news and features, all positioned extremely effectively.

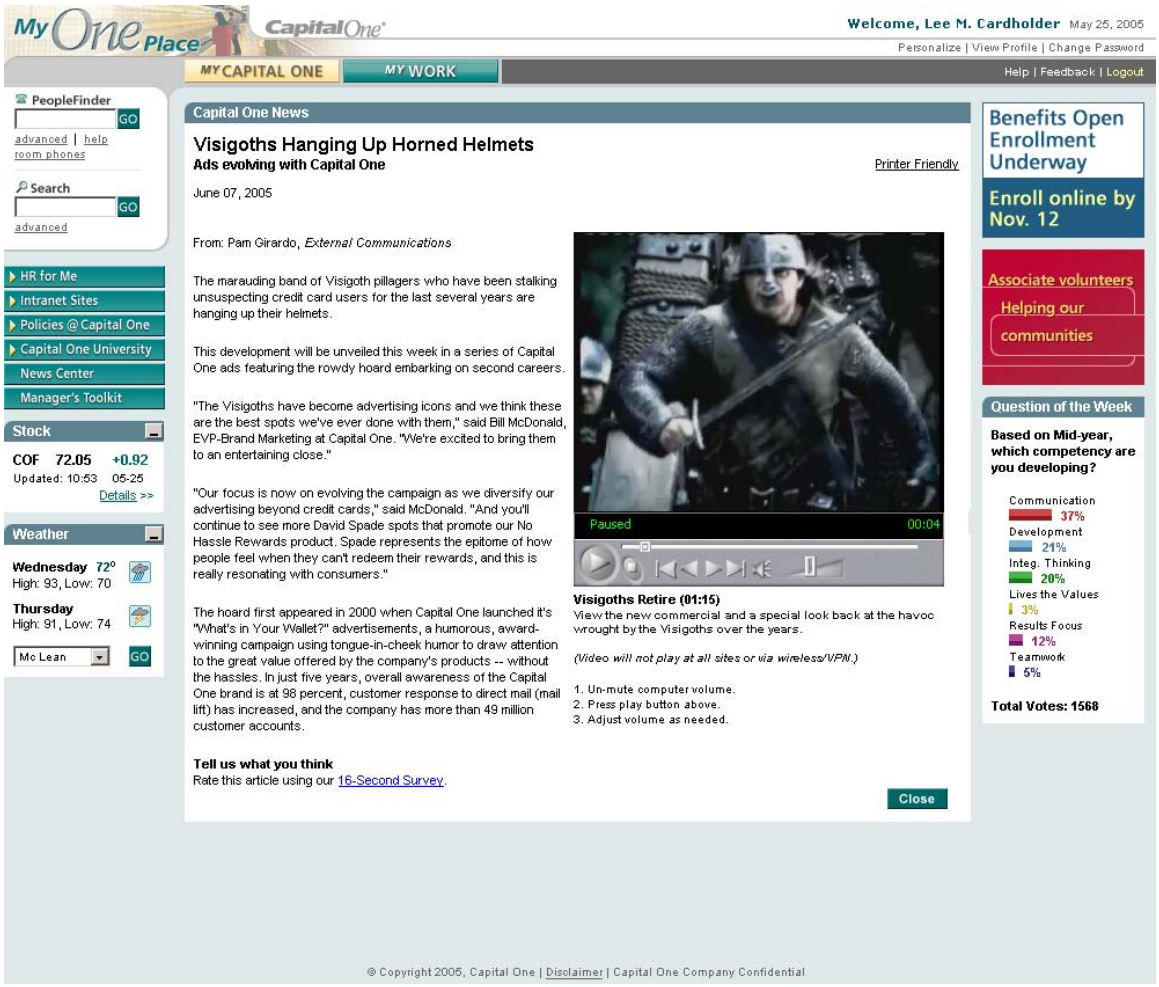
News

Clicking on a news items opens a nicely laid out news page. Above all, on these pages the text is thoroughly readable, and clearly presents each page's headline, subhead, byline, and the author's department affiliation.

A static picture enhances most news stories. When appropriate, articles instead include a play-in-place video. For example, a recent article gave employees a sneak-peek profile of a new advertising campaign—starring the now-famous band of credit card pillagers—and also included the commercial itself. This type of feature creates significant intranet draw, and also invigorates employee morale.

Where video is available, controls are arranged effectively. For example, the play button is the largest and most visible icon. Users can also stop, go forward, rewind, or adjust the volume. If users encounter video-playback problems, the page offers a quick list of ways to resolve common issues.

At the end of each article, users can rate it. This feature really engages users, asking them in bold-faced text to *Tell us what you think*. The link to the survey itself, *16-second survey*, also effectively employs information-bearing text. Such phraseology is far superior to nondescript terms, such as *More* or *Go*. More importantly, the link promises users a quick survey; who can't spare a mere sixteen seconds to answer questions? This is just one of the design team's effective techniques for not only involving users, but also continuously collecting their feedback.



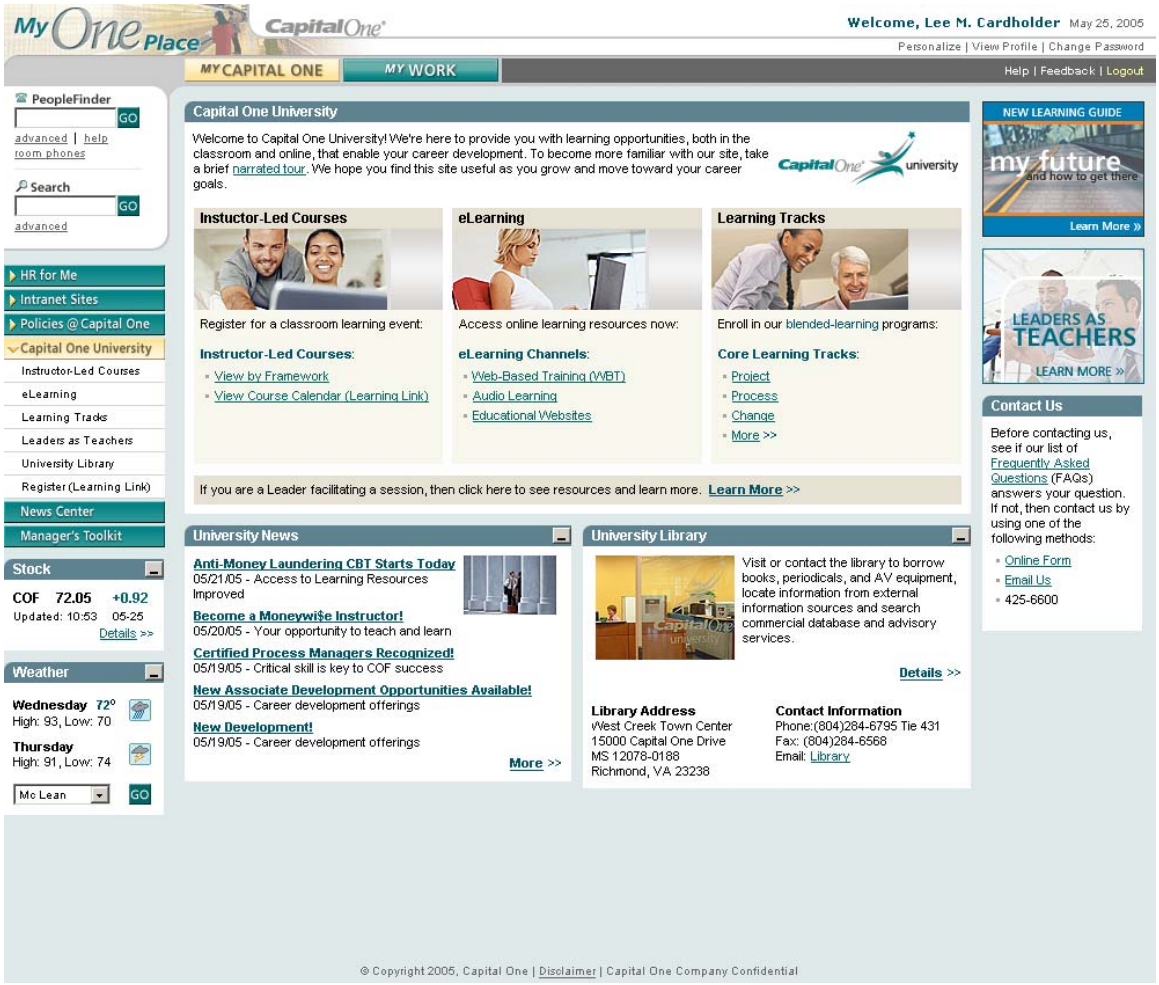
Pictured: This well-designed article includes text, video, and—like all content pages—an innovative, appropriately named *16-second survey* to collect feedback.

Training

Capital One offers numerous training, e-learning, and career development opportunities. All are described and supported on the intranet, specifically in the *Capital One University* section. Here, users can take self-driven online courses as well as instructor-led offerings. The page's news section also contains training-related news, including information about current and upcoming classes.

The page's FAQ helps users resolve intranet problems. While people are encouraged to use the FAQ, if they need additional help they can choose from a list of options,

including an online forum and inline links to call or email a representative. Likewise, the page also includes all of the Capital One library's contact information.



Pictured: The intranet's *Capital One University* is a robust training section that includes self-help tools and links to more information.

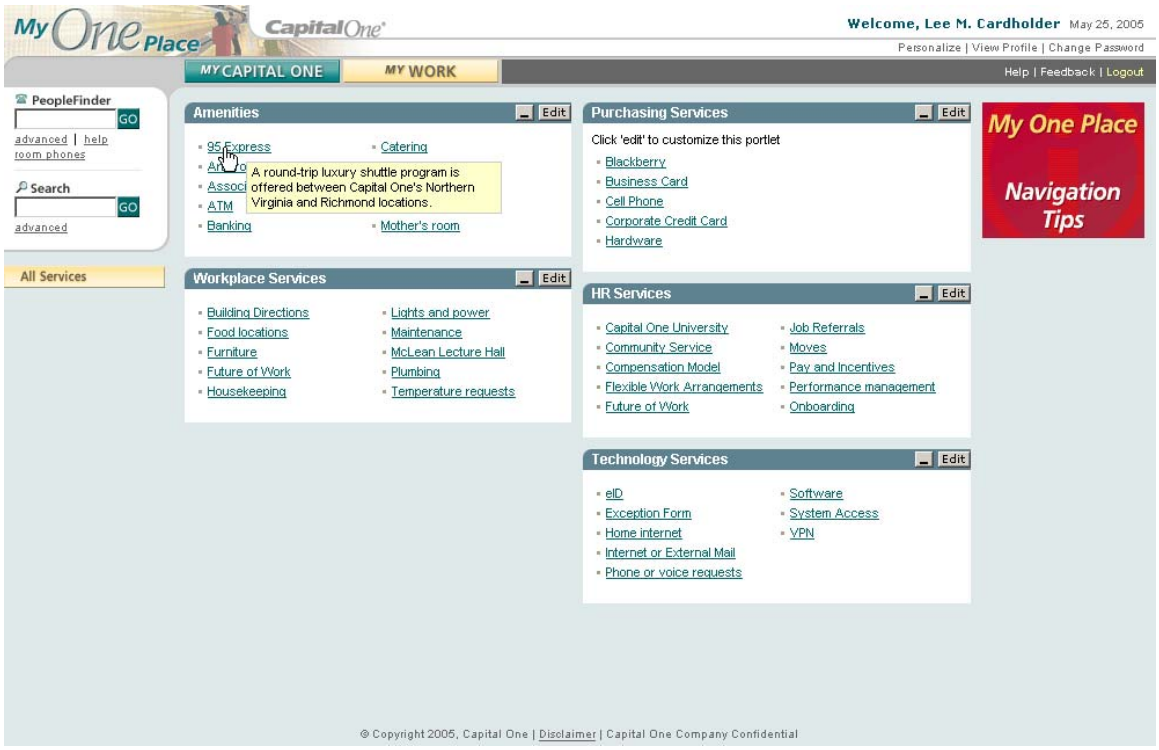
Services and Forms

When employees need to do something, they shouldn't have to hunt far and wide to find the related form, department, or person to contact. My One Place avoids this potential problem by providing a *Services* area, with all-in-one access to most of the organization's services. The page includes:

- ***Amenities*:** Special services related to Capital One, such as banking, ATM, and the *Mother's room*.
- ***Workplace Services*:** Services mostly relating to facilities and physical operations, such as plumbing, furniture, and food locations.
- ***Purchasing Services*:** For obtaining a corporate credit card, cell phone, or hardware.
- ***HR Services*:** Access to HR-related information, including salary, moving, hiring, and training information.

***Technology Services*:** Help for all technology issues, including software, VPN access, phone, and email.

In short, the *Services* area gives people what they want, when they need it.

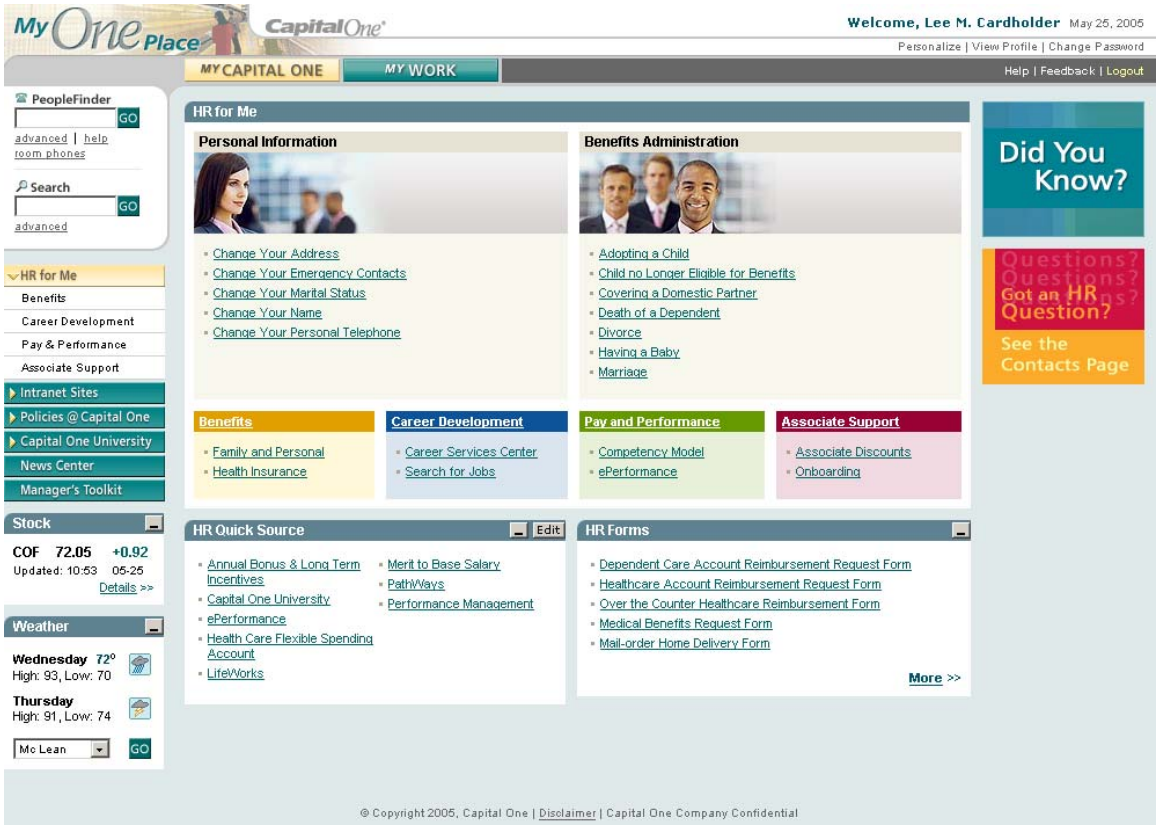


Pictured: The Capital One *Services* page contains links to most of the services an employee would need on a single page.

Giving users what they want, when they need it, is also the philosophy of the HR department's page. That's because the most basic and necessary HR-related tasks are listed right on the main HR page. Once there, users can immediately see how to update their address, emergency contacts, marital status, name, or telephone number. They can also tackle tasks related to performance, pay, training, and much more.

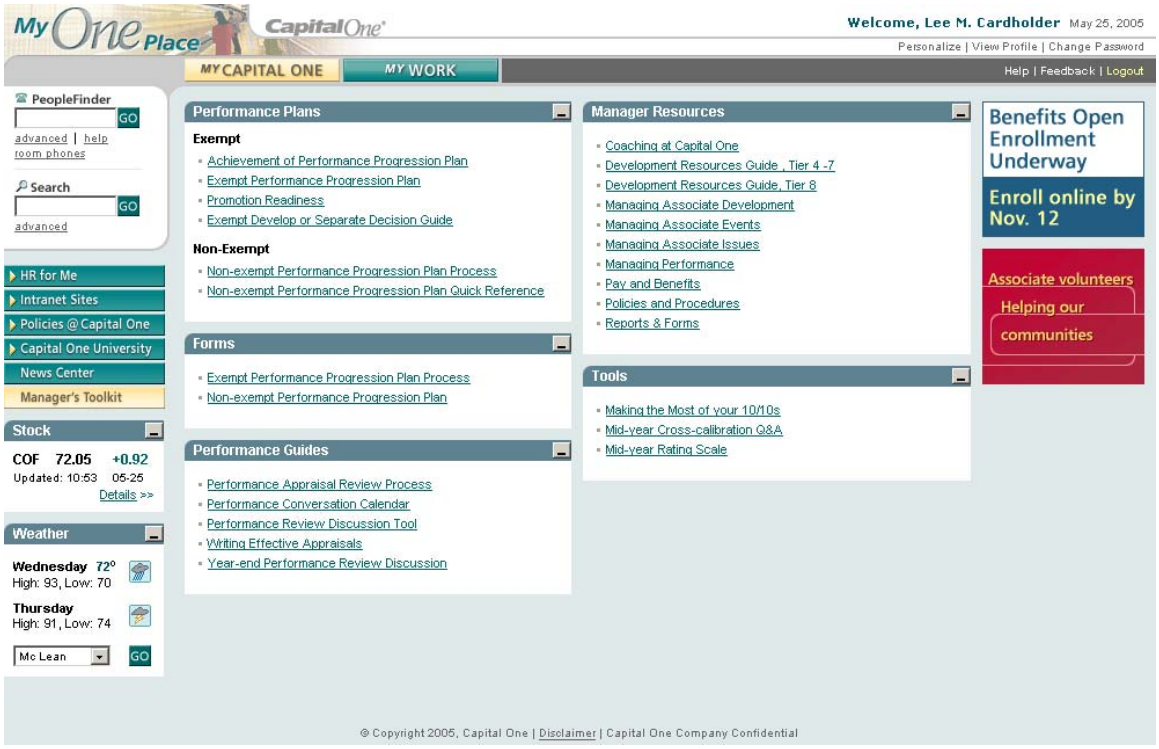
Note how links on this page describe the task a user needs to do. For example, to change your name, the link is simply *Change your name*. This straightforward language goes a long way toward ensuring that employees can easily use the intranet. By contrast, lesser designers might succumb to a catchy, yet vague phrase for the function, such as *Update Wizard*, *Quick Edit*, or *Info. Exchange*. Although these types of terms are common on intranets, users often either ignore them—because they simply don't know what they are—or else click them and end up where they don't need to be.

In short: Plain language always beats complicated language when it comes to effectively communicating how to do something, especially when it's a simple, straight-forward task.



Pictured: The HR department's landing page offers links to scores of HR-related functions, all written in simple, direct language users can understand.

Like the main *Services* and *HR* pages, the *Manager Toolkit* page consolidates management tools in one place. Such resources range from the simple (reports and forms) to the more complicated (coaching and career development).

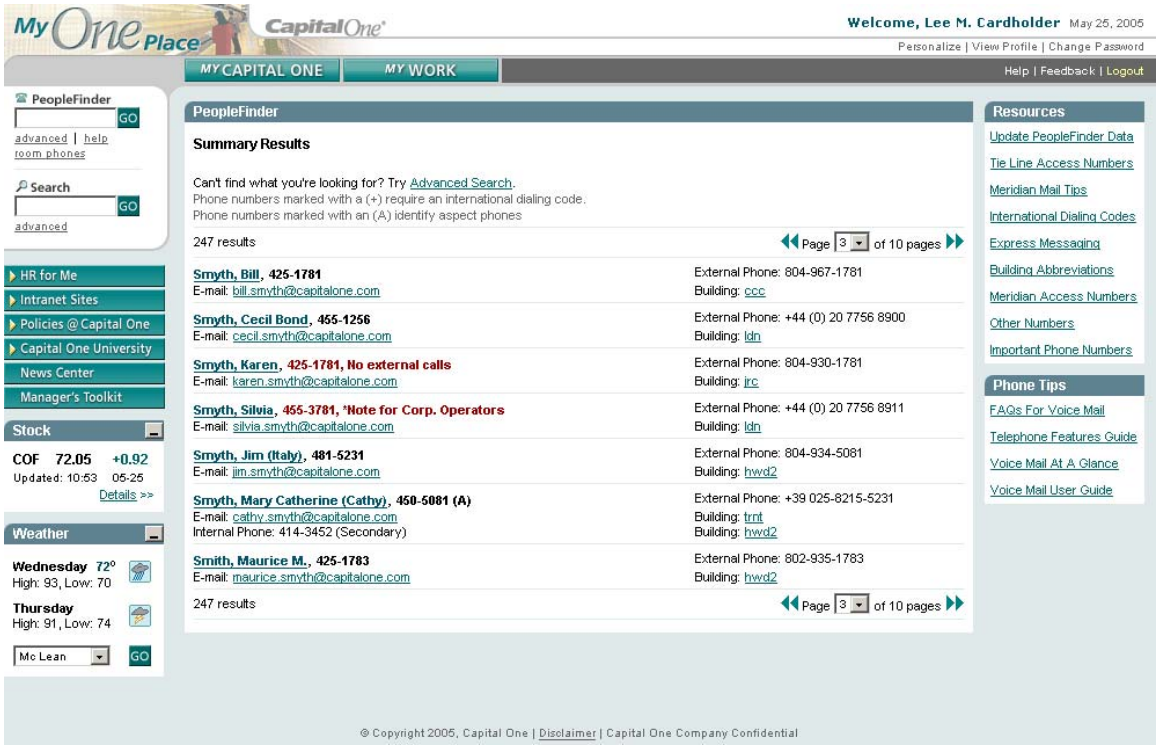


Pictured: Managers refer to the *Manager Toolkit* to find tools related to employee supervision.

Employee Directory

After users search the employee directory, the results page displays a surprising amount of information. Primarily, the eye is drawn to the right thing: search results. If users still need help, however, they can find it in the page periphery. For example, a link to *Advanced Search* lets people achieve results that are more granular. Yet, appropriately, the link doesn't distract from the general search results.

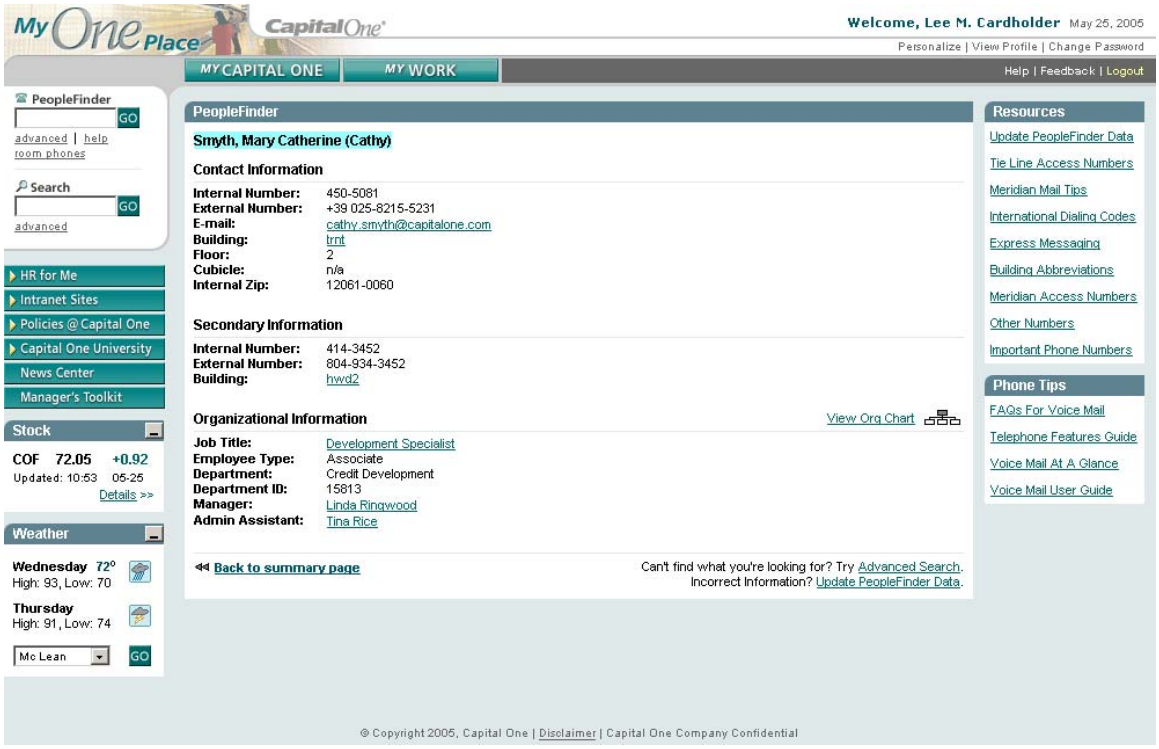
Similarly, a legend at the top of the page denotes whether a phone number is international, or has any other—perhaps unexpected—characteristics. On the right side of the page, the *Resources* section offers an assortment of just-in-time tips and help. For example, the page includes links to international dialing codes, phone and phone-mail tips, important phone numbers, and a link to update details.



Pictured: The search results page in the employee directory displays expected information about the people, but also gives relevant, just-in-time help for a number of discrete situations.

After clicking on an employee's name in the results page, users see a detailed document listing a person's name, job title, phone, email, and office location. The page also lists the employee's manager, and a *View Org Chart* link helps users visualize where the person fits in the organization.

Users can also edit their own information here by clicking *Update PeopleFinder Data.*



Pictured: An employee's details page contains all relevant contact and organizational information, along with additional resources and a link to view the employee's location on the company organizational chart.

As the Capital One intranet demonstrates, intranet design considerations can range far beyond mere aesthetics and raw lists of features. Yet the employee-oriented polish on the Capital One intranet isn't just about designers offering a "nice-to-have" feature; users prize it. Indeed, in multiple satisfaction surveys, users continually express approval for the site's easy-to-use, undemanding ethos.

URL AND ACCESS

The URL for Capital One's My One Place intranet portal is http://portal. It's the default homepage for all employees' browsers.

In addition, "we have recently added single sign-on to My One Place, a project we call 'Portal SpeedPass,'" says Brian Gruber, the director of Capital One's portal and productivity. Once users log on to their PCs, the SpeedPass automatically launches and logs them into My One Place and allows automatic access to numerous applications.

On-the-go employees can access the portal via a VPN.

So far, the portal is only designed for use on a PC. "The portal is viewable on BlackBerry mobile devices and on Macintosh computers, but has not been optimized for either of these," notes Elizabeth Woodward, the group manager for the Capital One portal.

CONTENT MANAGEMENT

For managing content, Capital One uses Fatwire 5.0. "We implemented this system in early 2002, before we started our portal project," notes Gruber. The software runs

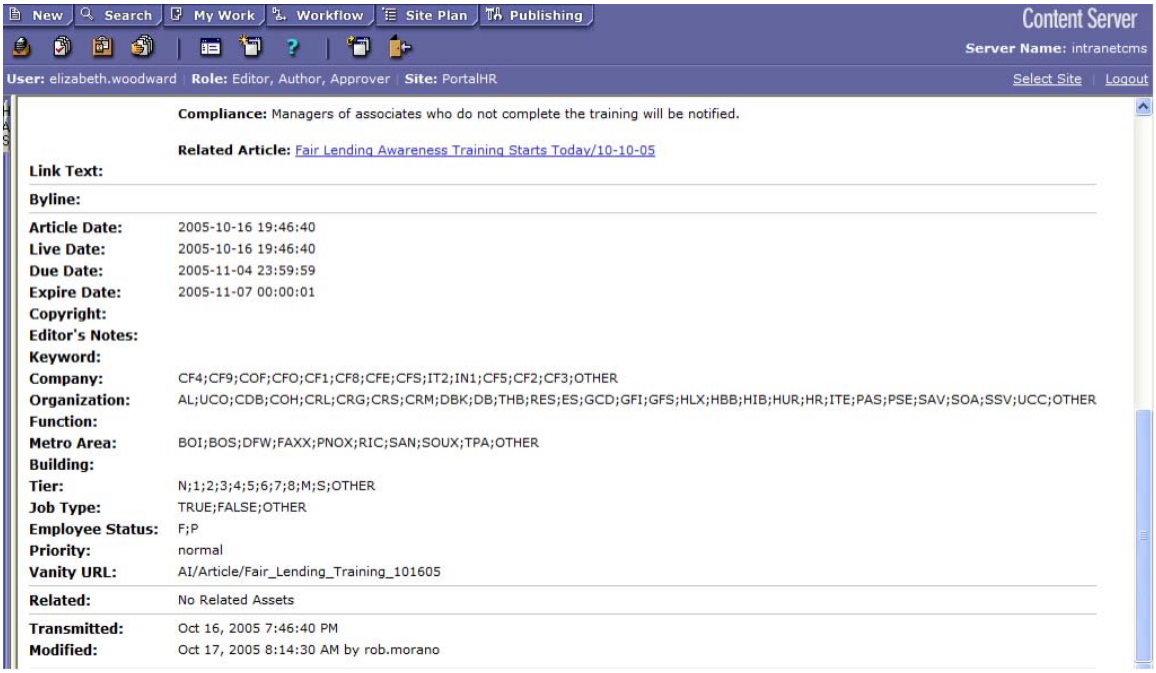
on Sun servers. The HR department oversees the "content experience," he says, "to ensure high-quality content that is consistent and well-written" using standards it agreed upon with the corporate communications department. The portal has always been a collaboration—primarily between those two departments. Not coincidentally, both also manage a variety of portlets and channels. For example, corporate communications maintains the *Capital One News*, *Spotlight*, and *Leadership Information* portlets, while HR owns such channels as *HR for Me* and *Capital One University*, plus the *News from HR* portlet.

"The partnership that we have between HR and corporate communications has allowed us to implement content standards and guidelines that work across our portal content areas" says Rebecca Pratt, who was the portal design lead and now manages much of Capital One's internal communications. "Having both groups represented on the portal content team means that we can quickly identify and respond to gaps in our guidelines. It also enables us to make joint decisions about when to allow content owners to deviate from the guidelines. The effect is that there is consistency across content and a clear governance for content-related decisions."

A content guide, created in-house, helps direct departments that want to update their parts of the portal. Content standards are also useful when adding new portal sections. "When building any new spaces in the portal, we adhere to our content standards and guidelines, with rare exceptions," says Catherine Murphy, the group manager for Capital One portal's content and usability.

Design templates ensure consistent presentation of navigation and content and, on the whole, they work quite effectively, says Murphy. "It hasn't been as difficult as expected because we are involved in implementation of all content." Indeed, the portal team keeps a close watch on content through constant auditing and, sometimes, through specific suggestions. In the future, "we plan to run an annual audit of content to determine inactivity. This will help us ensure content remains fresh."

Even so, fostering high-quality content has become more difficult. "Going back to experienced site owners and recommending changes on an evolved site is more difficult than bringing a new site up and training a new site owner to apply our standards," notes Murphy.



Pictured: All of Capital One's articles, links, and images are managed from its Fatwire CMS. Content managers can also tweak six attributes (including location, department, and level) to aim content at appropriate users—Capital One's version of a personalized portal. In any piece of content, content managers can also reference related articles by including their CMS link in the relevant space (at top of page).

TECHNOLOGY

Capital One's portal technology is BEA Portal 8.0. As noted above, Fatwire 5.0 handles content management. For searching, the portal uses a recent version of Verity Ultraseek.

The portal team also uses various other tools: ClearCase for configuration management, Test Director for test management, and ClearQuest for defect tracking. Production monitoring tools include Prism, Topaz, and Visual Sciences.

The portal team continues to tweak the technology. "We have made some configuration changes in terms of how BEA and Fatwire interact as part of our work to stabilize and speed up the portal," notes Gruber.

In addition, says Woodward, "we have created a content repository that separates the management of content by content authors from the production delivery to My One Place. Both of these [have helped] contribute to high stability, lower maintenance, and improved user experience since the initial portal launch."

GOALS AND CONSTRAINTS

Goals:

- Make the portal the primary communications tool, but deliver only relevant, targeted information to users.
- Improve collaboration and knowledge-sharing.

- Improve users' productivity, especially for common services from the HR, real estate, IT, and supply chain departments.
- Technically, continue to improve the portal's speed and stability.
- Improve content quantity, quality, and consistency.

Constraints:

- Limited time and budget.
- The need to master new portal technology; there's always a learning curve.
- A surfeit of good ideas, and not enough time or money to implement them all.
- Lack of sufficient employee resources and skills.
- The need to transition the organization to one portal, yet not disenfranchise users accustomed to intranets and information architectures that basically worked for them.

BASIC INTRANET FEATURES

The portal offers a large amount of information for Capital One employees, grouped by the tasks they need to accomplish. For example, *HR for Me* includes all the HR information and links a user needs. Overall, the portal provides access to 130 different services.

In addition, the portal gives users a customizable list of *Quick links*, plus access to various types of news and online courses, local weather listings, and a library of policies. Users can also provide feedback about any portal page or news article, and respond to portal surveys.

USERS

Capital One's portal, My One Place, is accessible to 12,500 employees, contractors, and consultants, which includes everyone at the company's locations in the US, the UK, and Canada. By 2006, Capital One plans to expand the portal to employees of Hibernia Bank, which it recently acquired. That will boost portal access to a total of 20,000 users.

USER TASKS

The most typical user tasks include:

- Find other employees, including contact information, location, and information about their job position
- Search for corporate information
- Access corporate, industry, and local news, including archives of past stories
- Use portal-based tools needed to accomplish daily work
- Locate and enroll in training through the corporate university
- Find information about HR programs and policies

- Find and read corporate policies
- View HR metrics
- Access more than 130 corporate services from the HR, real estate, IT, and supply chain departments

BACKGROUND

Plans to create the now-current portal first began in 2002. “Capital One has had an intranet for many years,” notes Gruber. Even so, “in 2002, as we were completing an enterprise-wide ERP implementation, we had the vision to move to a dynamic, personalized portal,” he says.

Indeed, the PeopleSoft ERP implementation, including self-service HR tools for employees, laid the foundation for moving to a portal. The HR department also began planning knowledge management and organizational productivity projects. At the same time, the corporate communications department began investigating how its new CMS could better target users with content.



Pictured: Capital One's original intranet. The site was mainly used to deliver news, but lacked targeted content, personalization, application integration, and security.

"The portal initiative began in late 2002, and I was given leadership of the team in early 2003," says Gruber. From the start, "we brought our goals of direct access, productivity, knowledge management, and improved content under one team." While organizationally, the HR department took ownership of the portal, corporate communications and IT also participated strongly, and that arrangement continues to this day.

Launching the New Portal

To develop the portal, Capital One organized a development team: HP Consulting, to conduct the preliminary studies on translating the old intranet into a new portal framework; Object Systems Group, to design the information architecture; Aquent, to design the presentation layer; and Deloitte, to build the navigation and help design the information architecture. Capital One employees handled all related project management work.

With the team in place, portal development began immediately. "In 2003, we laid our groundwork—by defining business requirements, choosing software, and completing our information architecture [IA]—then we delivered a pilot portal to our first 200 users in February 2004," says Gruber. That rollout "was mostly done to prove that we could get the infrastructure to work. But it also served the purpose of getting our IA and our designs into production, as the best test for these is using them."

Subsequently, "we went live to a larger audience in a staged release between May and September 2004," says Gruber. "This included building out more portlets and adding more content, but no change in design." By the end of September 2004, Capital One had more than 10,000 portal users.

For the new portal, Capital One chose to eschew personalization at the individual level in favor of targeting information to groups of users. This functionality mirrors and indeed replaces the organization's previous approach to mass-information dissemination: sending emails targeted to specific subsets of employees.

"While all associates have access to the same My One Place, they will have different, targeted experiences with the system, based on their location and role," says Gruber. Targeting involves six attributes, including location, department, and level, as well as "some role-based attributes, such as whether or not the customer is an associate, or manages others," says Gruber. "Interestingly, this parallels part of how Capital One does business: leveraging an information-based strategy to make the right offer to the right customer, at the right time and the right price."

Using the portal to target information allowed Capital One to stop using email for that purpose, which had immediate benefits. "Giving users less—but more relevant—information makes a big difference in their productivity," notes Gruber. Furthermore, targeting information on the portal increases its overall usefulness. "Targeting allows us to make My One Place equally relevant to the executive and the administrative assistant."

From September 2004 to April 2005, the design team focused its efforts on three things. "The first was change management, with the goal being increased adoption and use of My One Place. The second was improving the underlying infrastructure, as we found our biggest issues were with speed, scalability, and stability. Our third area of focus was on listening to our users. We did extensive surveys, held focus groups, sought comments, did interviews with associates at all levels, and responded to feedback from the 'feedback' channel on the portal. We learned what people liked and disliked, and what new things they wanted to see," says Gruber.

From that feedback, the design team discovered users' five biggest portal pet peeves:

- Logging in

- The *PeopleFinder* search
- The portal's speed
- The search engine
- The surfeit of homepage content

The design team began addressing each problem. Thanks to tweaks of the portal and CMS software, by April 2005, it had improved site speed and stability. Then, in May and June, "we focused on content, creating new content like the *Capital One University* site, revamping content like the *HR for Me* channel, and redesigning the presentation of news on the homepage," says Gruber. These changes improved content quality and consistency, and also reduced the amount of homepage content.

From August to September 2005, the team tackled the final two outstanding usability issues. To address users' log-on complaints, it implemented *Portal SpeedPass* to automatically log users onto the portal and more than twenty related applications once they've logged into the network. "This is effectively single sign-on for the portal, and is based on the log-in that everyone has to do on their PC each morning," Gruber says.

Overall, Capital One moved quickly from idea, to design, to launch. "Once we found the right sponsor and had the right support, it took us ten months to design and build our portal and deliver our pilot phase," says Gruber. "It took a further seven months to fully complete our production rollout."

First Major Redesign

For the portal's first major redesign, things also moved quickly. "The redesign took only about three months from concept to delivery, and that timeline included work on our infrastructure," he says. "Right now, we deliver a new release of My One Place every four to six weeks."

One crucial technique for refining the portal through redesigns is watching what users say about the portal, as well as how they actually use it. "We review our feedback [and] user activity via metrics, and focus group data," says Gruber. "We have also done some one-on-one activities with key users, such as administrative assistants and executives," says Murphy. The bottom of every portal page also includes a feedback button, which many employees use, and the portal team follows the feedback closely.



Pictured: This Visual Sciences tool helps the portal team harvest My One Place metrics to see how employees are actually using the portal. (Note: metrics displayed are for illustration purposes only.)

"We are always willing to adapt based upon feedback—which associates submit online and through user focus groups," says Murphy. "We also have conducted 'Yousability Fairs' that reach out to our associates and managers and collect feedback. Our line-of-business communicators are another influential group that helps us set and adapt our guidelines and standards."

Other rich sources of information, notes Gruber, are conferences and published benchmark studies. "We attend a few conferences each year to learn from others, and are also part of a benchmarking group where we share and learn from others."

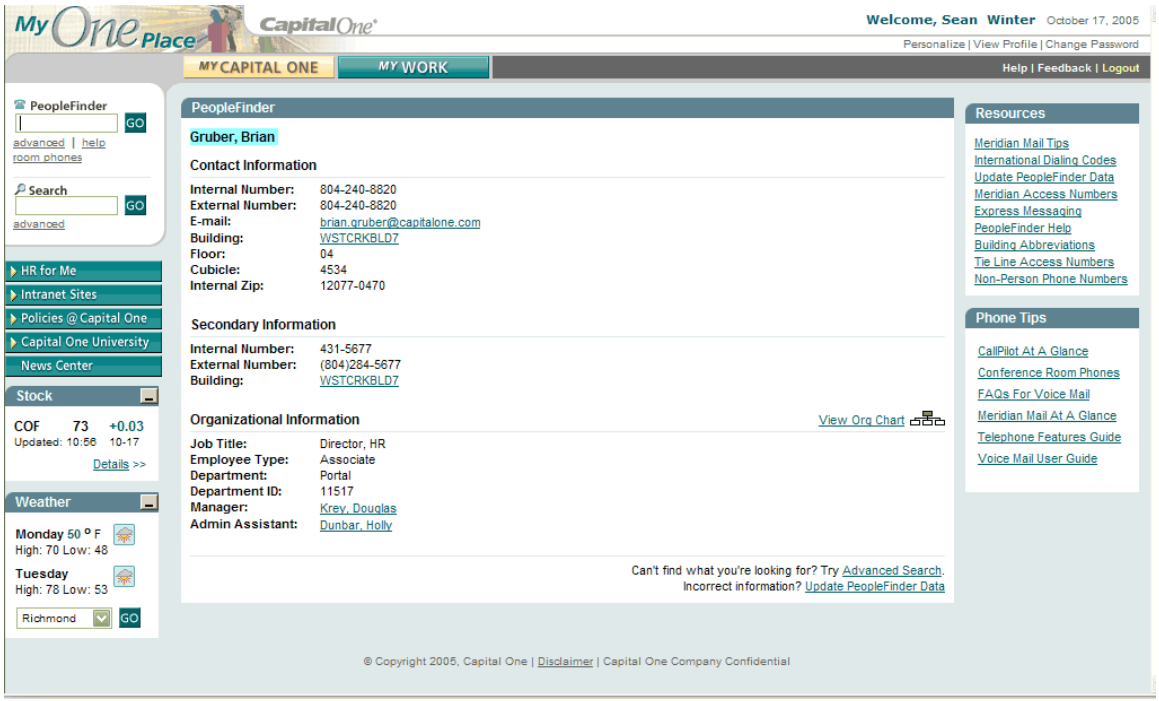
TIMELINE

- Early 2002: Implemented Fatwire software for content management.
- Late 2002: Launched a project—driven by the HR department—to create a single, company-wide portal.
- 2003: Intranet design team articulated the portal's business requirements, selected software, and designed information architecture.
- February 2004: Launched portal pilot for 200 users.
- May–September 2004: Portal rollout continued, reaching a total of 10,000 users. Subsequently, portal team size decreased as it transitioned to more of a content-management role.
- April 2005: Improved the portal's speed and stability.

- May 2005: Redesigned homepage and launched a new Capital One University channel.
- June 2005: Launched the redesigned HR for Me; My One Place available to the Auto Finance business.
- August 2005: Launched Services functionality (access to 130 services centralized in one portal location).
- September 2005: Released SpeedPass (automatic portal log-in) to initial user group.
- October 2005: Upgraded search engine and launched Worklist functionality; My One Place available to European businesses.

RESULTS

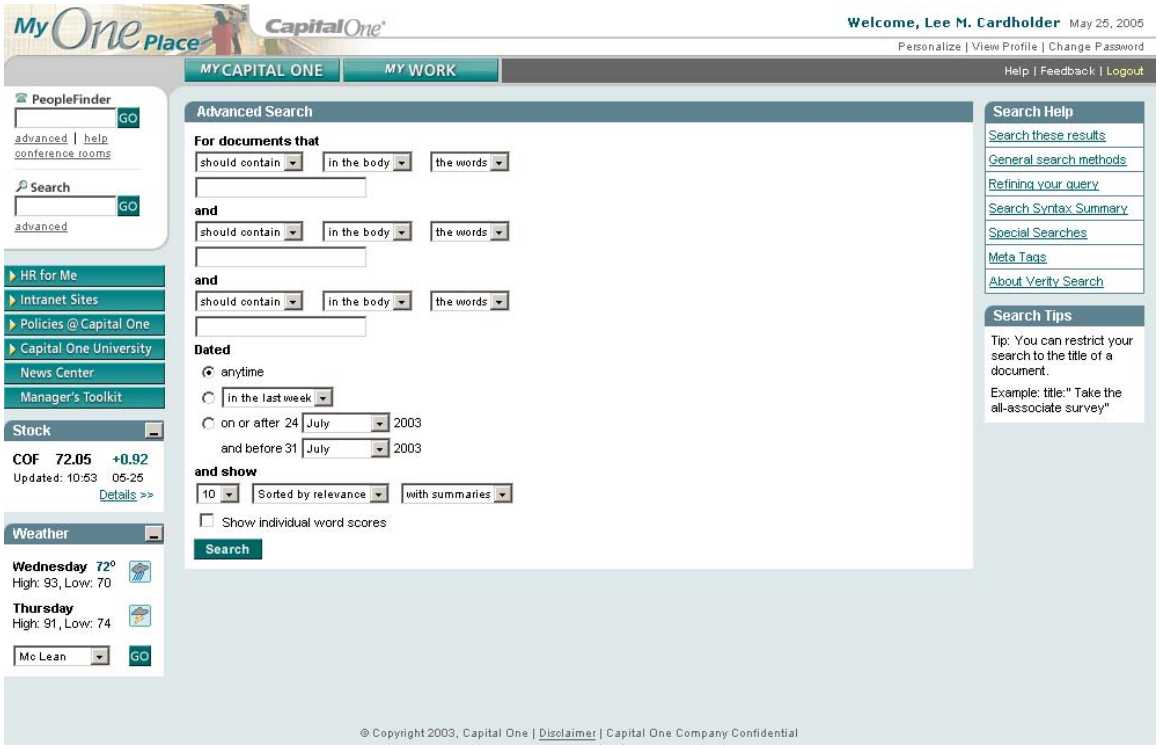
The principle benefit of having a new portal is simple: It offers one homepage for all of Capital One. "My One Place is the primary source for organizational news, both from corporate communications and from HR. It is the primary place, through our *PeopleFinder* tool, that associates find phone numbers, locations, directions, and organizational information. It is the home for key HR content about benefits, career development, pay and performance, and associate relations. My One Place houses the *Capital One University* site, which is the primary interface into our training and development organization. Other key tasks for which associates use the portal include accessing 130 different services, plus our corporate policy directory," notes Gruber.



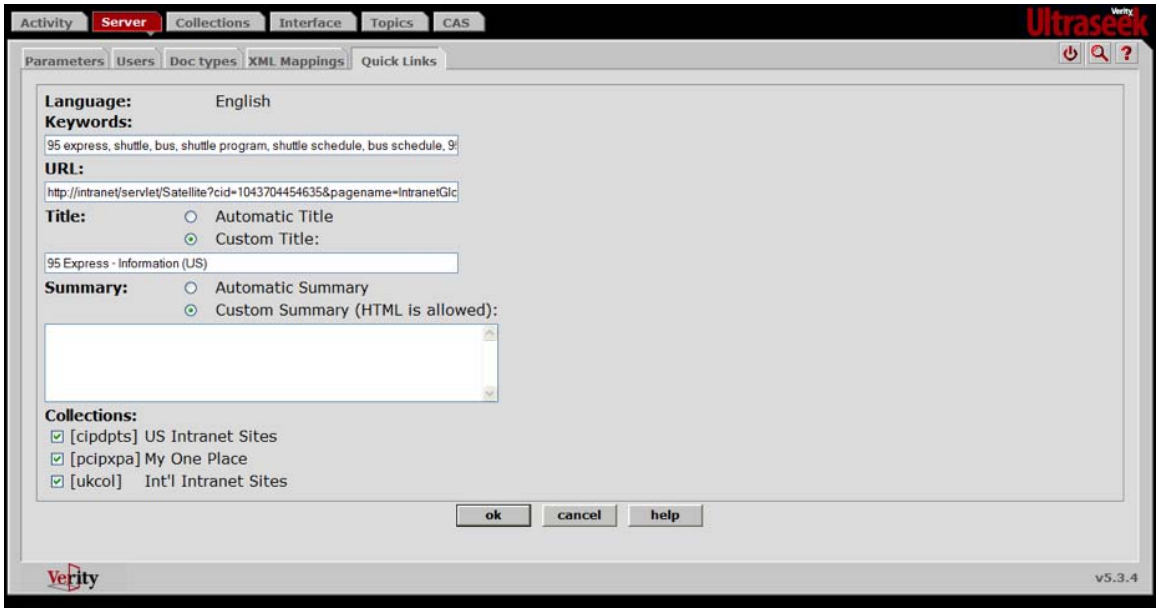
Pictured: A results screen from Capital One's redesigned employee directory, *PeopleFinder*, which provides location information, job role, manager, and administrative assistant contact information. One especially useful feature is the link after "building," which leads to driving directions.

The portal redesign also addressed two of users' biggest complaints: the lack of single sign-on, and the poor quality of search engine results. Now, the portal's *SpeedPass* provides single sign-on and is available to 3,600 users. "It has been a huge hit," notes Gruber. In fact, post-redesign user surveys and interviews found a staggering 100% satisfaction rate. Furthermore, "users tell us they now use My One Place more frequently." Thus, the *Sp*eedPass rollout will continue, with the goal of offering it to all users by early 2006.

Gruber says the redesigned portal also offers "vastly improved" search capabilities. While portal search is powered by a Verity search engine, "we found that our tool was outdated and searched only a fraction of the content we had available." So the portal team upgraded the search engine to the latest version, tweaked the search algorithm, tripled the amount of content that was available, and added other desirable functionality, such as *Did You Mean?* responses to increase the likelihood of a successful search.



Pictured: To improve search results, the portal team upgraded to the latest version of the Verity search engine, added more indexed content, and also provided users with *Did You Mean?* responses to increase the likelihood of a successful search.



Pictured: Behind the scenes, this tool allows content managers to manage keywords for content and boost the search engine's effectiveness.

The portal team's work on speed and stability also paid off, with the portal's speed increasing by 80% from January to October 2005. The site also maintained an uptime of 99.8% or better for each of the first six months in a row.

Those improvements helped drive a 22% improvement in user satisfaction, as measured by user-satisfaction surveys conducted in October 2004 and May 2005.

Tweaking content on the homepage and on the HR content channel, and improving the search engine, all fostered a dramatic increase in portal use. "In December 2004, we averaged 40,400 page views per day," says Gruber. "By June 2005 our average was up to 57,100 page views per day, and in November it had increased to 72,300 page views per day." Overall, that's a 79% increase in portal use in eleven months. Today 99.3% of Capital One's professional staff uses the portal at least once per day, and an average user logs 3.5 days per week on the portal.

Even with all of the changes, however, the portal still largely rests on the foundational designs and information architecture created very early in the project. "At the highest level, these designs work well for our users, which I think shows that the intense efforts we put into our pre-production design was well spent and successful," says Gruber.

The portal is especially useful for helping new employees acclimate to the organization, though mostly as an adjunct to other training. "We do provide new-hire support materials through My One Place, but because we have a very robust new-hire orientation program, including an instructor-led training session, we've found that new hires mainly rely on My One Place for support once they've gone through this training," notes Murphy.

Training for new managers, however, is more explicitly focused on the portal. "This helps new managers become familiar with all the tools and systems that will be critical to their new role," she says.

Finding New Business Uses for the Portal

With the portal now live, employees are constantly discovering new uses for it. "A great example of how people think about leveraging the portal came about after a Diversity Forum, attended by about 600 associates. The presentation was by James Suroweicki, who discussed his book, *The Wisdom of Crowds*. Basically, he detailed how a group composed of many people, even non-experts, makes better decisions than a very small team of experts," says Murphy. "After the presentation, at a lunch attended by the author and about twenty-five other people, the idea was brought up—not by a portal team member, but by several others—to use My One Place and our *Question of the week* feature to help guide decisions at Capital One. So the next week, we put up a question asking which credit card features—a big part of our business—were the most useful to them." In other words, with the portal, Capital One has gained a useful mechanism for gathering data to help guide corporate thinking.

Users also provide the design team with reality checks. For example, even though the portal includes a wealth of features, the team learned that not everyone knows about them all. Take, for example, the results of a focus group on HR content. While users in general found the tool being tested extremely valuable, "the biggest lesson learned for the portal team and those attending the focus group was that not everyone has learned about all the useful tools on My One Place." In focus groups, participants often suggest creating a specific tool for the portal, only to be shown that it already existed. "At the end of one focus group, one very vocal attendee said, 'I'm not sure you need to change a thing! I've learned so much today,'" says Murphy. As a result, "we know we now need to focus as much attention on educating users on those existing My One Place tools as we go on rolling out new tools."

Team Changes

Post-portal rollout, the portal design team has changed in two significant ways. First, it's smaller. "We are smaller primarily because the biggest components of our infrastructure are built and functioning smoothly," says Gruber. "That said, we do continue to develop new functionality, improve content and navigation, integrate applications and work, and expand to provide services to new audiences."

Currently the portal team includes twenty-five "full-time equivalents," notes Gruber, adding that the mix of employees and contractors are drawn from IT, HR, and corporate communications. "These team members perform a diverse range of functions, including design, development, and testing; performance monitoring; content authoring; and listening to customers and conducting usability testing."

The other significant portal team change, post-implementation, is just that "the team has become more operational," he says. "Now that we have a working portal that is full of content, we have to spend more of our time managing the content and ensuring an outstanding user experience for our customers. This includes regular content audits, managing search, checking links, and regularly conducting 'customer listening' efforts to ensure that we are continuously improving the usability and customer experience of the portal."

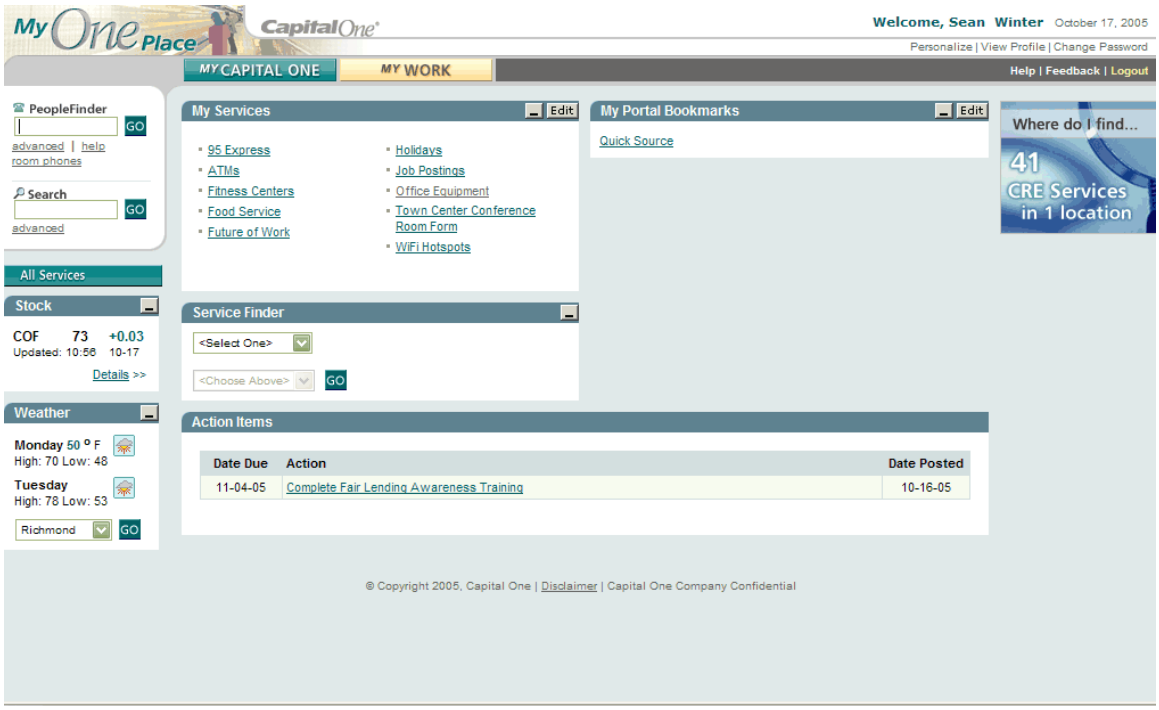
While Capital One doesn't have specific information about how much it budgets for the portal team's ongoing training, Gruber notes that staff development is an organization-wide aptitude. "Capital One has been named a 'top 100' training organization by *Training Magazine* five years in a row," says Gruber, adding that the company has made the top 25 each year, and was ranked 18th in 2005. Such training tenets apply equally to the portal team.

Future Portal Plans

Going forward, the portal team has an ambitious agenda for adding portal improvements. They recently began offering the portal to employees based in Britain. Soon, the portal will also feature two new tabs. *My Organization* will house departmental news. "This will distribute ownership of content to the communicators in each of Capital One's major departments and lines of business," says Gruber. Meanwhile, the *My Community* tab will introduce communities of practice to "support specific roles in the company, such as project manager."

Beyond the new tabs, he says, "we are also focused on bringing more work tasks into the portal, including creating an in-box for workflow tasks, and integrating with such things as our document management system," he says. Today, business applications are largely absent from the portal—though the portal is a gateway to such applications—since the team initially focused its portal efforts on "content, connections, information, development, learning, and providing tools to managers." In other words, the current portal is young.

Beginning in 2006, "we do plan, over time, to move more work tasks into the portal," Gruber says. One early example is the now-live *Action Items* portlet on *My Workspace*, which collects various kinds of content from around the portal in one location, allowing users to then act on it.



Pictured: The *My Work* tab aggregates tasks and work-specific tools for portal users. Currently, most business applications don't live on the portal, but new functionality such as the *Action Items* portlet illustrates how future portal iterations will continue to bring business tools and applications into the portal.

The design team will also soon revisit the homepage design, with the goal being to better visually differentiate "what requires action, versus what is informational," says Gruber.

LESSONS LEARNED

Insights from Brian Gruber:

Invest time upfront to get a great, usable design. "While we have made a lot of changes along the way, they haven't been deep architectural changes, and our design has stood the test of time. In fact, having this solid, core design has let us move more quickly with our other changes, and it keeps things consistent for our users. Having consistent navigation also helps them adapt to the changes more quickly."

Address governance from the start. "We are committed to having a positive, consistent experience for users, which requires strong governance. My advice: implement governance from the very beginning of the project. For example, we built My One Place thanks to a great partnership with corporate communications and IT, yet we initially made clear exactly who owned what. Without this clarity, people get used to doing things their own way, and that leads to an inconsistent user experience, plus inevitable headaches later. So now, as we are bringing in a large amount of new content from other departments and lines of business, we have articulated a clear structure and a sound set of guidelines for how we will govern content on My One Place."

Remember that everyone works differently. "One of the things that surprised me: how differently people work. In particular, making design decisions based on my own work habits—that would be a bad idea. There is no one, prototypical worker, and perhaps I've been most surprised by just how widely users' responses to new designs and changes has been. With most releases, we get responses from all over the spectrum."

Successful designs are influenced by listening to many users. "Good design requires input from a broad cross-section of our users. We do this through focus groups and user sessions, and garner invaluable feedback that helps us hit the mark with our designs far better than any decisions we make on our own."

Many small problems can add up to a major problem. "A lot of small issues can be as bad as, or worse than, a major flaw. For example, we went live with a working portal that had no dramatic flaws, but did have a lot of small issues. None of the issues were show-stoppers on their own, but the combination of all the small things impacted our users worse than having one big flaw. We had to address these issues before we were able to really move forward and get our users excited about the portal. When we did address them, however, the portal really began to take off."

Merrill Lynch

Using the Intranet:
Merrill Lynch (ML) is one of the world's leading financial management and advisory companies, with offices in thirty-six countries and total client assets of approximately $1.6 trillion. Merrill Lynch has three core businesses: Global Private Client, Global Markets & Investment Banking Group, and Merrill Lynch Investment Managers. Together, these offer private clients, small businesses, institutions and corporations, and financial intermediaries a range of financial services.

Design Team:
In-house and Capgemini

Members:
Jane Muirsmith, director of ML online marketing; Larry Mark, director of employee communications; Kevin Dooney, vice president of ML online marketing

SUMMARY

To design Merrill Lynch's WorldNet intranet, the intranet team employed an iterative design methodology, including card-sorting exercises. Given this groundwork—the significant time the design team spent researching employees' needs and designing ways to meet them—the intranet's success is no surprise. Even so, designers have deftly balanced employees' needs with a range of business needs to arrive at today's winning design.

Unprecedented levels of user traffic on WorldNet speak for the design results. For example, in a month-to-month comparison—from redesign pre-launch to post-launch—the number of unique visitors to WorldNet increased by 10,000. In addition, total visits increased by 700,000 over just two months and page views doubled, reaching 8 million per month.

Homepage

WorldNet's homepage offers a balanced combination of news, market information, and tools specifically designed for Merrill Lynch employees. A large area on the homepage (the top middle) contains two major news items. The rest of the news lives in one of the following tabs: *Global News,* maintained by the employee communications department; *ML Headlines,* generated from external sources; and *New on WorldNet,* which highlights the intranet's new offerings and services. For all news sources, users can easily navigate to archives as well.

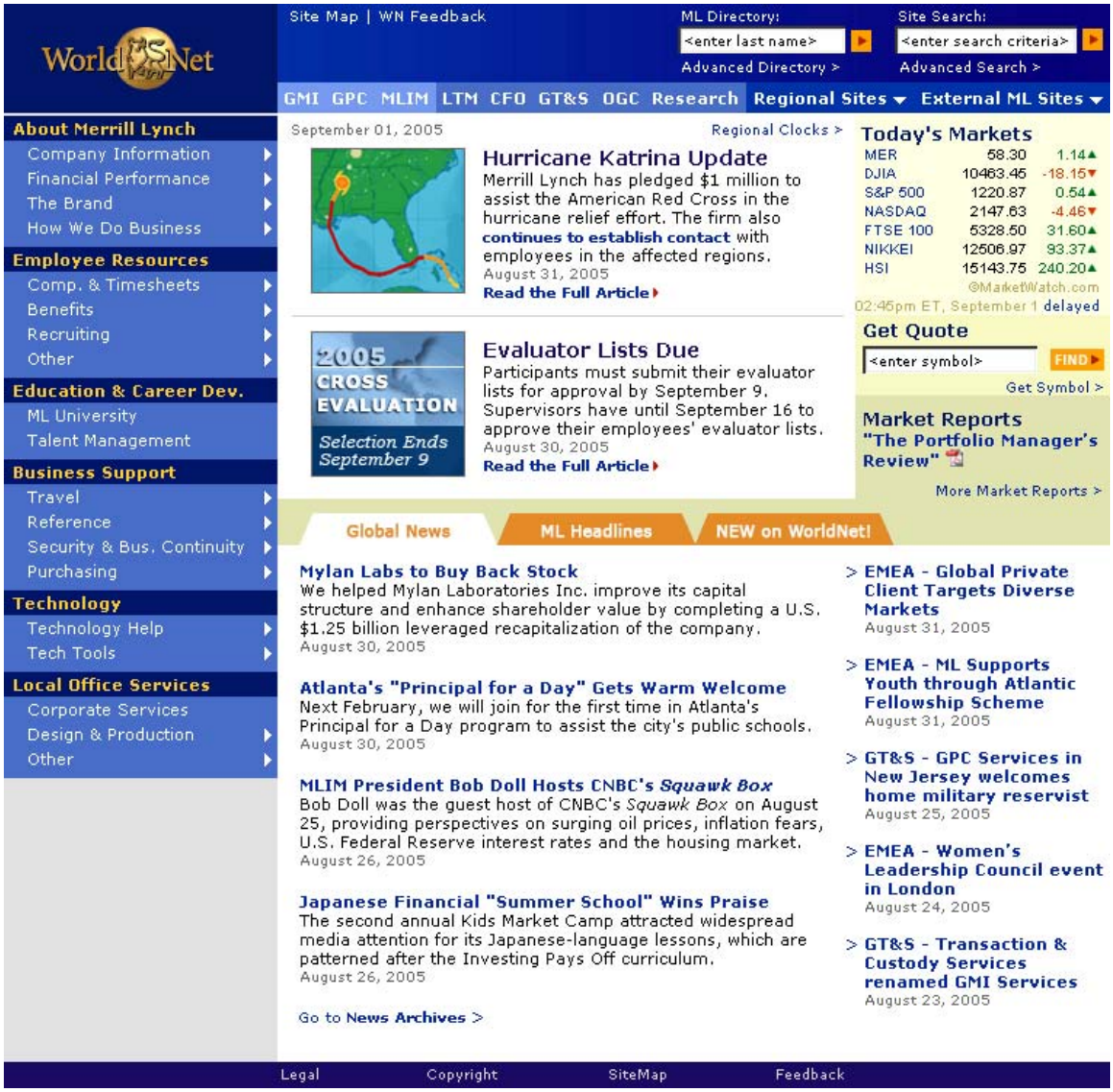
On the homepage, the upper-right area is reserved for market information. *Today's Markets* displays a summary of the stock exchanges, so by just glancing at WorldNet's homepage, employees can get a handle on the markets. The *Today's Markets*, *Get Quote,* and *Market Reports* tools use BigCharts.com, a MarketWatch data feed, to unify three formerly separate homepage elements. In particular, the *Market Reports* section showcases one recent market report, with a link below leading to *More Market Reports.*

Employees can use the *Get Quote* tool to find information about stocks they're interested in. (While this is not a feature we'd recommend adding to most intranets, and certainly not to their homepages, in a financial services organization such as Merrill Lynch, this type of tool is completely appropriate.) If the user doesn't know a stock's symbol, the *Get Symbol* link quickly solves the problem.

Merrill Lynch's three core businesses offer a range of services for private clients, small businesses, institutions and corporations, and financial intermediaries. The navigation across the top of each page leads to separate sections for each core

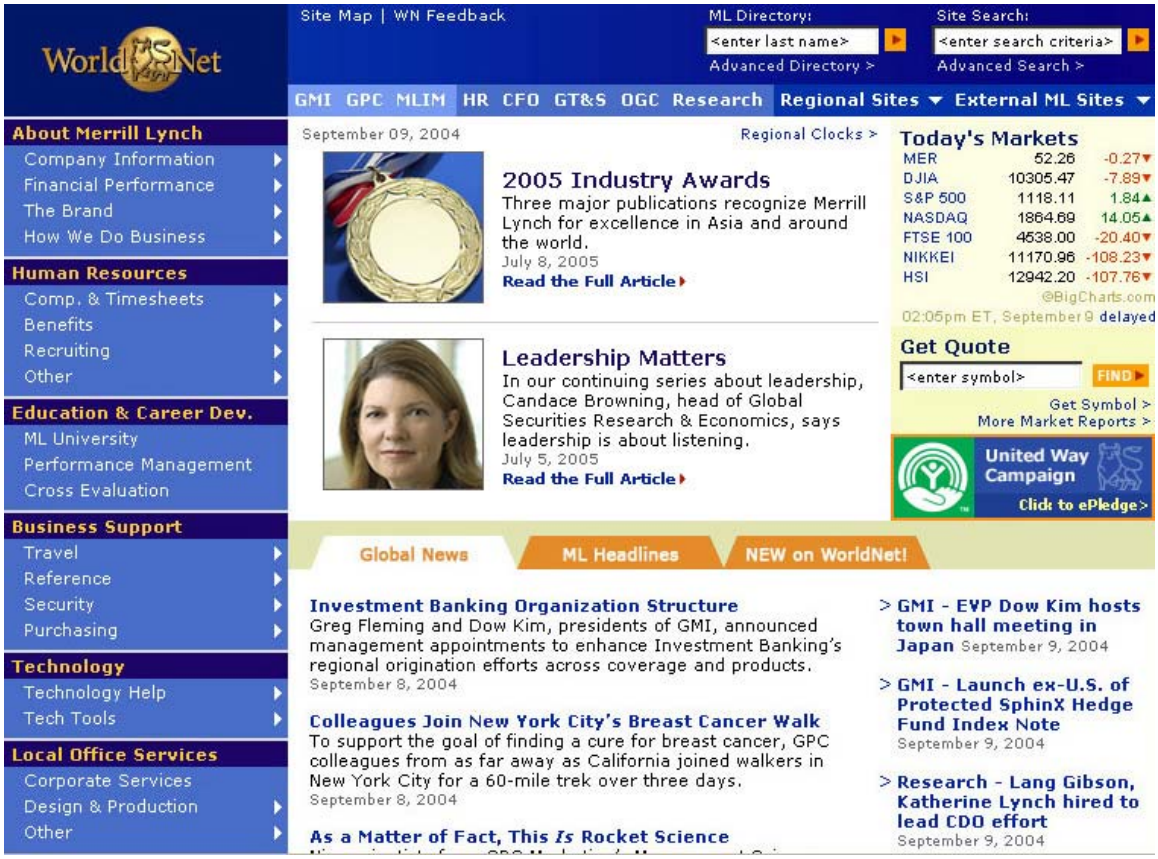
business: Global Markets & Investment Banking Group (GMI); Global Private Client (GPC); and Merrill Lynch Investment Managers (MLIM).

Beyond the homepage features, the designers also make effective use of color and spacing. Even with a variety of homepage features, the design doesn't look cluttered or off-putting.



Pictured: The Merrill Lynch intranet homepage dedicates most of its space to important news items. While the page contains relatively little market information and stock quotes, such information is placed quite effectively.

Another section of the homepage, for global advertising campaigns, occasionally promotes new initiatives or campaigns. When used, this feature replaces *Market Reports*.



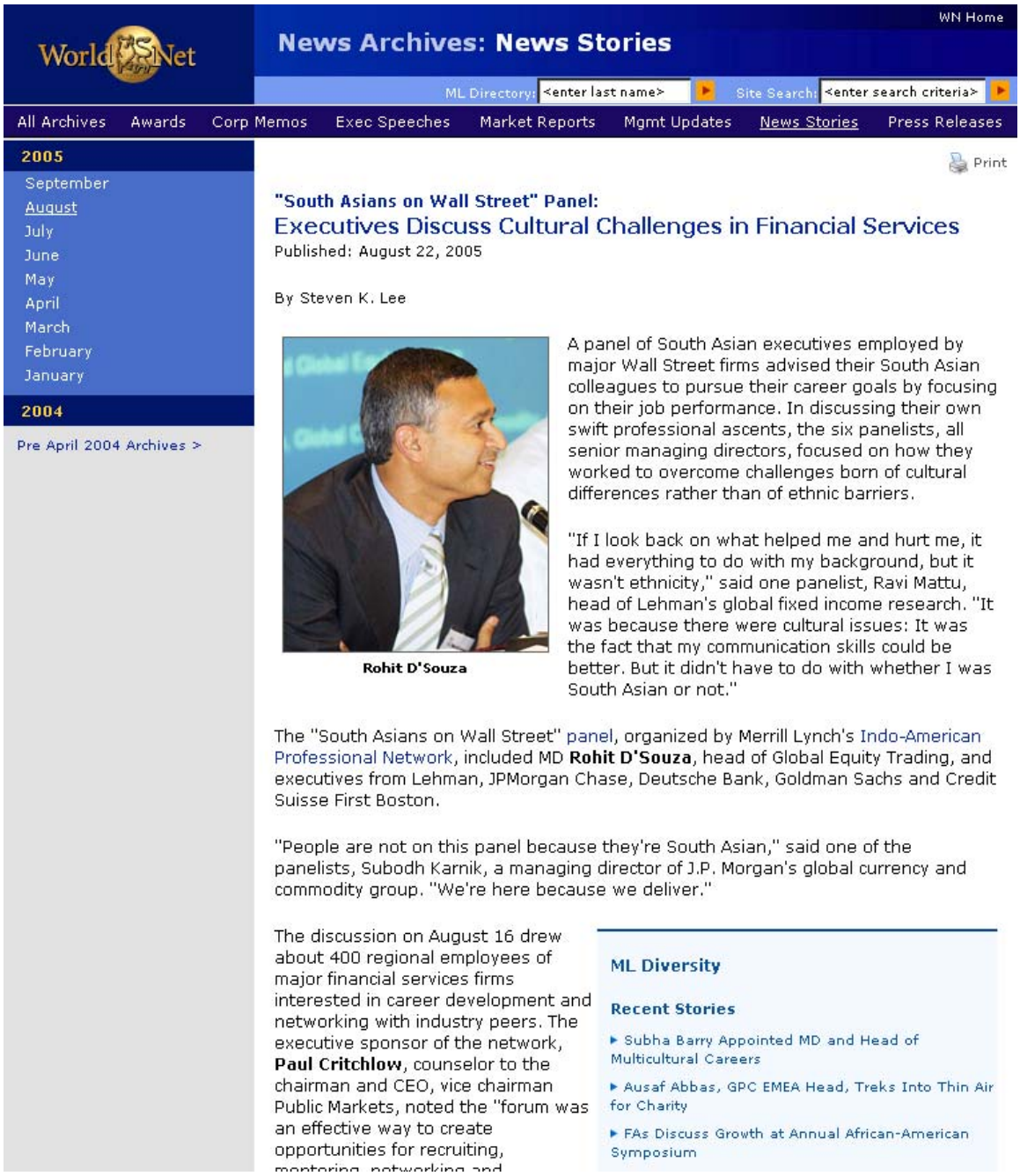
Pictured: While the center-right advertisement on the Merrill Lynch homepage typically promotes *Market Reports*, the space is flexible. Other advertisements sometimes run here, such as this promotion for the United Way campaign. Even so, users still have a link to access though *More Market Reports*.

News

When it comes to producing news stories, the employee communications department follows clear, specific standards. This works to users' benefit. For example, each news page displays a heading, subhead, and date, followed by the author's name. In the text of an article, people's names appear in bold-faced text so users can quickly see who's mentioned. Then, in carefully selected places, in-line links further help users navigate stories.

The employee communications department skillfully employs high-quality images to enhance articles. As in the below example, a photograph can channel what the story might not say explicitly: here, that the pictured executive is not only authoritative and knowledgeable, but cheerful as well. Photographs also include a caption, centered just below the image, with the person's name. While this small detail is something many intranet designers omit, captioning photographs—especially those with people in them—is extremely important.

Finally, in the bottom-right part of the page, a box displays links to related articles, which helps users discover stories and news they may have missed.



Pictured: Clear but thorough standards for news stories help ensure that users can easily read and navigate them.

Some articles offer a more dynamic user experience by linking to related videos. In general, the video medium is particularly appropriate for two things: speeches from company leaders, and demonstrations of new technology.

At Merrill Lynch, the intranet page leading—and linking—to any video includes vital information: a concise summary of the event shown in the video and, more importantly, information about the speaker. Beyond giving users needed context to

decide if they should watch the video, this also helps the intranet's search engine properly index the video.



Pictured: Selective use of video in articles can enhance users' news-reading experience.

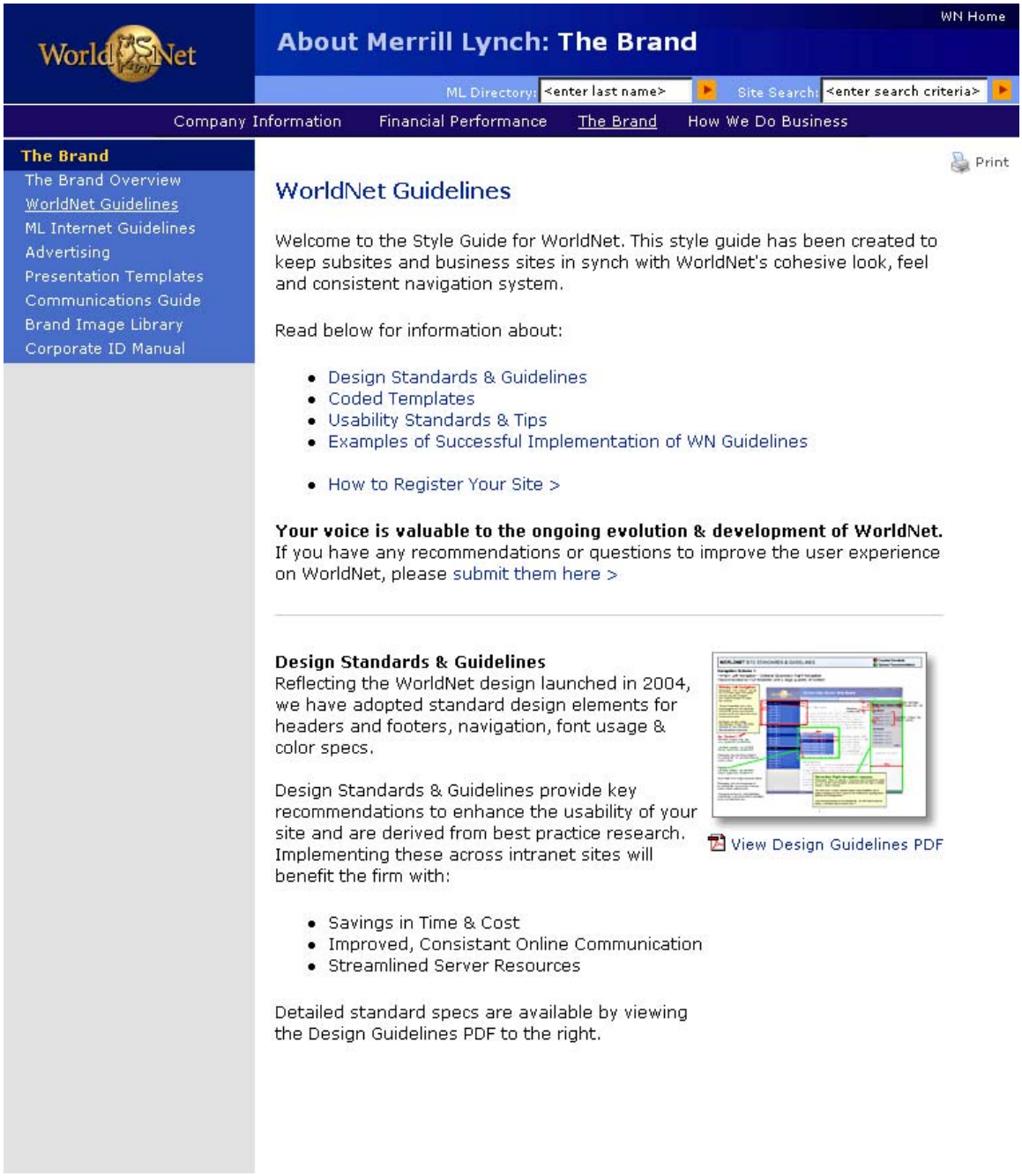
Design Standards and Guidelines

When it comes to designing or contributing content to the Merrill Lynch intranet, the intranet team keeps things simple. Rather than over-detailing design standards and guidelines for users, for example, the intranet's designers have reduced standards to a concise list of the most important things users need to know.

For starters, links on the left side of the *WorldNet Guidelines* page provide users with needed background on the Merrill Lynch brand, plus related advertising and communication standards. Overall, the page's content is uncomplicated, and calls out the most-important information in its primary links:

- Design Standards & Guidelines
- Coded Templates

- Usability Standards & Tips
- Examples of Successful Implementation of WN Guidelines
- How to Register Your Site

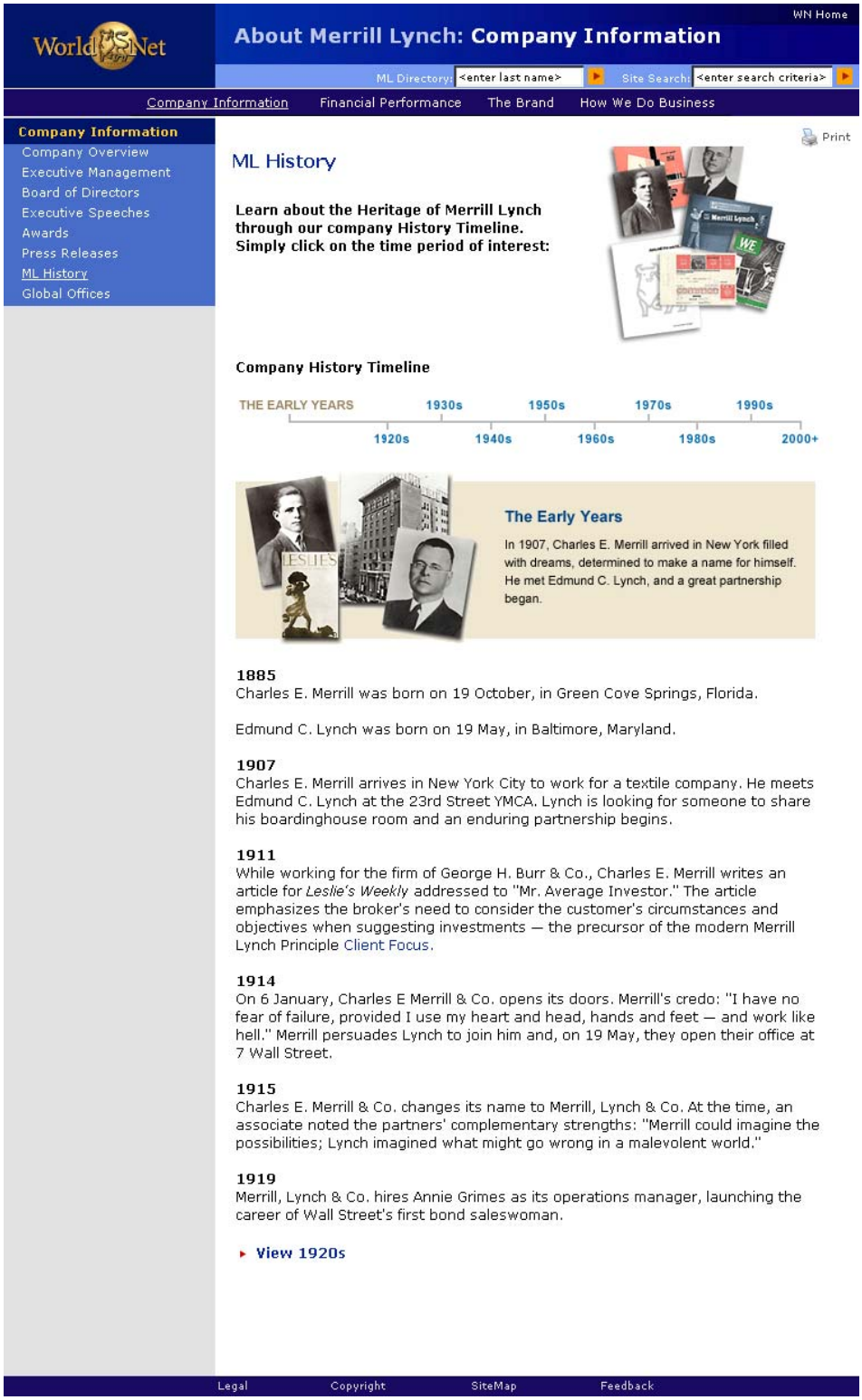


Pictured: The WorldNet guidelines page provides users with necessary brand and communication standards. It also offers the templates, details, and examples users need to successfully deal with intranet design mechanics.

New Employees

To help new employees acclimate, the intranet offers tools and services for their specific needs. For example, to give new employees a better understanding of the organization, the intranet provides information about company history, executive management, global offices, and more.

On the history page, a timeline highlights important Merrill Lynch moments from the early 1900s on. The information concisely details how the organization began. Such content, while not mandatory for conducting day-to-day business, can nevertheless be relevant and interesting to employees.



Pictured: The Merrill Lynch intranet offers an extensive array of corporate information, including such things as an overview, a corporate history and timeline, and speeches from executives.

The range of the Merrill Lynch intranet's features underscores the extensive time and effort designers spent, and continue to spend, vigilantly collecting feedback from users. The team especially relies on usability studies, as well as intranet-based feedback forms. The results of their efforts have a noticeable, positive impact on the intranet's design—to the benefit of all Merrill Lynch employees.

URL AND ACCESS

The URL of the homepage is http://www.worldnet.ml.com. WorldNet is the default start page in all employees' browsers, and is also bookmarked in their browsers. Mobile users can access the intranet via a VPN connection.

CONTENT MANAGEMENT

Merrill Lynch's CMS is a Web-based, custom-built tool—based on .NET and XML—that was designed to support multiple Merrill Lynch sites. It was built in-house, using Visual Studio .NET and Visual Studio 6.0.

"Building a CMS in-house was not a simple task, but we didn't have to start from square one," notes Grimmer. "We've been using an internally built learning management system built for our e-learning platform and noticed many synergies on how courses are built, and how content is displayed, on our websites." The CMS, then, "is built around best practices in workflow management that we've experienced over the years." Today, the CMS supports several Merrill Lynch sites—internal and external—with templates differentiating each site and section visually.

Homepage content is managed by the communications and public affairs business group, which "defines the ongoing development strategy" of the intranet, notes Larry Mark, the director of employee communications. As part of that strategy, the group also maintains intranet guidelines and standards for such things as editorial tone and content, design, look and feel, and navigation. The online marketing group also helps business units design templates that meet those standards and guidelines, while visually differentiating each Merrill Lynch group or region.

So, while each business group manages its own intranet content, it must nonetheless follow guidelines that include design standards, usability standards, and content templates. "Each business group has its own identity within the corporate structure," notes Kevin Dooney, a vice president in Merrill Lynch's online marketing department. "Changes in content and layout reflect this structure and their unique requirements."

Writing for the Web, versus writing in other mediums, also requires a unique approach. For new-content contributors, then, Merrill Lynch offers specific advice for how to approach Web writing:

MERRILL LYNCH'S ADVICE FOR NEW CONTENT CONTRIBUTORS
Keep it brief: writing online is different from writing for print
Clearly identify the main/key points: what do you want the user to know, have, or remember? So: use easy to understand titles write for scan-ability
Always consider the lowest common denominator (lower-literacy users)
Employ bullets, hypertext, and graphics effectively

TECHNOLOGY

To help design the new site, the intranet team used Microsoft Visio to create wireframe designs, then Adobe Photoshop to create design and usability comps. To actually build the site, the team used Macromedia HomeSite.

The intranet runs on Microsoft Windows 2000 Server.

GOALS AND CONSTRAINTS

Goals:

- Create an enhanced and more-useable gateway for employees to access important content, tools, and services on the Merrill Lynch intranet.
- Provide an improved, unified, and consistent navigation system for the entire intranet.
- Be a channel for consistent corporate and employee communications.
- Breakdown silos, better share information, and ultimately consolidate the number of intranet sites.
- Increase the intranet's speed.
- Add or improve various tools for such things as the phone book, printer-friendly content pages, market data, market resources, corporate information, and updates.

Constraints:

- Redesign had to be delivered within four months at a previously agreed-upon budget.

BASIC INTRANET FEATURES

One of the principle features of the Merrill Lynch intranet is clear navigation. "The navigation on the site was a result of an exhaustive audit and study of resources and businesses within the organization," notes Dooney. "While the top-of-the-page navigation reflects the structure of the firm, left-hand navigation strictly adheres to user needs across business units. This header and navigation scheme is consistently used across all intranet sites at Merrill Lynch."

The intranet homepage also effectively differentiates critical news from information that is simply useful or good to know. Furthermore, news is updated daily and written by the in-house editorial staff.

Even so, users wanted more outside perspectives. "Our employees requested more content about the firm from outside sources, so we also provide a real-time, external news feed on the *ML Headlines* tab," says Dooney. Additional homepage tools tackle key market data, stock quotes, and the employee directory.

USERS

WorldNet, Merrill Lynch's intranet, is available to 51,000 employees in thirty-six countries.

USER TASKS

- Read about current news, and issues relating to Merrill Lynch
- Access the company directory
- Reference HR tools, such as compensation and timesheets, 401(k) information, benefits, and career development and educational resources
- Read market data
- Retrieve stock quotes
- Access additional Merrill Lynch sites, including business groups and support sites

BACKGROUND

Merrill Lynch's first global intranet site launched in 1997, and the first major redesign began in 1999.

From the start, each business unit or region has been responsible for its own parts of the site. Each unit designates someone to specifically oversee its intranet, and that individual is part of a firm-wide intranet development group, chaired by the online marketing department. The firm uses this approach "to ensure a common vision and development platform for the intranet, and adequate use and application of the intranet standards and guidelines," says Dooney.

The company takes an organic perspective to redesign. "We approach change as an evolutionary process that occurs over time—as sites are updated and redeveloped—as opposed to it happening within a short, defined period of time," he says.



Pictured: The second version of the WorldNet homepage (post-1999 and prior to May 2004). Among this homepage's problems were that it didn't follow usability best practices, the information hierarchy was difficult to follow, and load times were slow.

Today, the intranet team is composed of people from a variety of departments and functions, including online marketing, employee communications, business group communications, and technology. The intranet team itself is part of Merrill Lynch's communications and public affairs group.

DESIGN PROCESS AND USABILITY ACTIVITIES

The redesign itself was partially driven by the 2003 employee survey, which asked employees for input on the current WorldNet, and what they wanted to see in the future. Over 3,000 employees responded, "an unprecedented response," says Jane Muirsmith, director of Merrill Lynch's online marketing. "Employees demonstrated that they cared a great deal about WorldNet and its future direction—the level of passion and engagement in the survey was astounding."

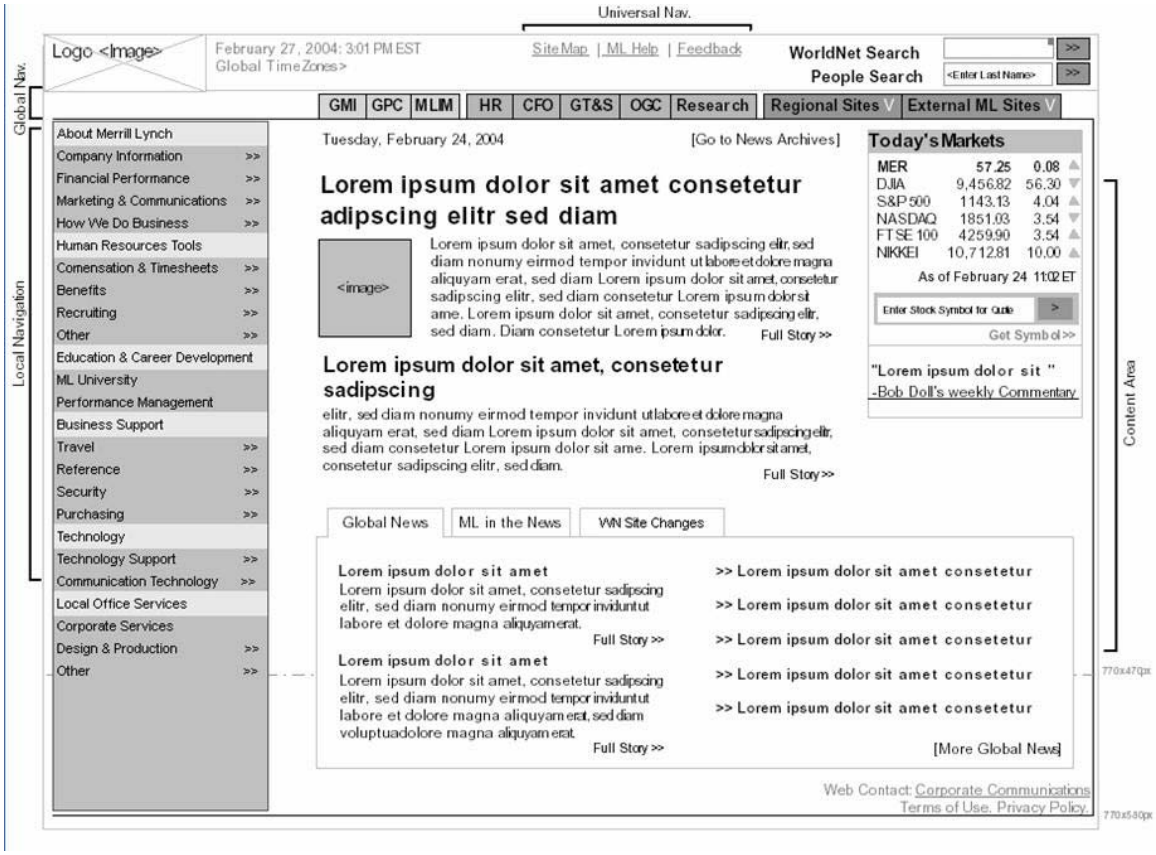
Why did so many people respond to the survey? One factor: "This was the first time that employees were given a voice in the future development of the intranet," she says. In addition, the survey revealed more people use WorldNet more frequently than the online marketing department had anticipated. Finally, everyone who answered the survey was entered in a drawing to win an iPod.

The survey results showed that most employees wanted intranet improvements to help them do their jobs more easily and keep abreast of relevant business news. From a redesign standpoint, the survey also "provided concrete data, and a foundation to begin the redesign process," says Muirsmith.

To determine which next steps the intranet design team should take, the group—along with Capgemini—began to benchmark Merrill Lynch's intranet against other financial services intranets, as well as against leading intranets in general. This helped create "best practices, and 'next-practices,' that would meet our audience's needs, as well as our business needs," Muirsmith says. The team also gathered input from senior management, and studied intranet logs to discern problem areas for users.

One feature in need of improvement was navigation. While the employee survey highlighted this, the intranet redesign team needed actual information about what to adjust. "To create the navigation for the site, we needed to identify users' needs and expectations," says Muirsmith. To do this, the team used a variety of usability methods, including user interviews and analyzing users' intranet feedback. They then began building mockups.

"After some initial wireframes, designs, and content bucketing, we conducted a card-sorting exercise to identify users' wants and frustrations. This exercise helped define the navigation and nomenclature scheme," she says.



Pictured: After gathering user feedback and conducting card-sorting exercises, Merrill Lynch used multiple wireframes to hone the new design. This is one of the penultimate homepage mockups.

TIMELINE

- 1997: Launched the first global Merrill Lynch intranet site.
- 1999: Released second version of WorldNet.
- Summer–Fall 2003: Conducted the 2003 employee survey, including questions about employees' perceptions of, and desires for, the intranet.
- Fall 2003: Gathered business requirements for the redesign.
- December 2003: Made small design and nomenclature enhancements to WorldNet to create a more unified-looking site.
- January 2004: Began WorldNet redesign.
- February–March 2004: Planned redesigned intranet and built new information architecture, design, taxonomy, and nomenclature.
- April–May 2004: Built hard-coded version of WorldNet.
- May 2004: Launched third iteration of WorldNet.
- June–December 2004: Developed new CMS.

- December 2004: Relaunched third version of WorldNet, powered by a CMS that syndicates content to both the intranet (WorldNet) and the external site (ML.com).

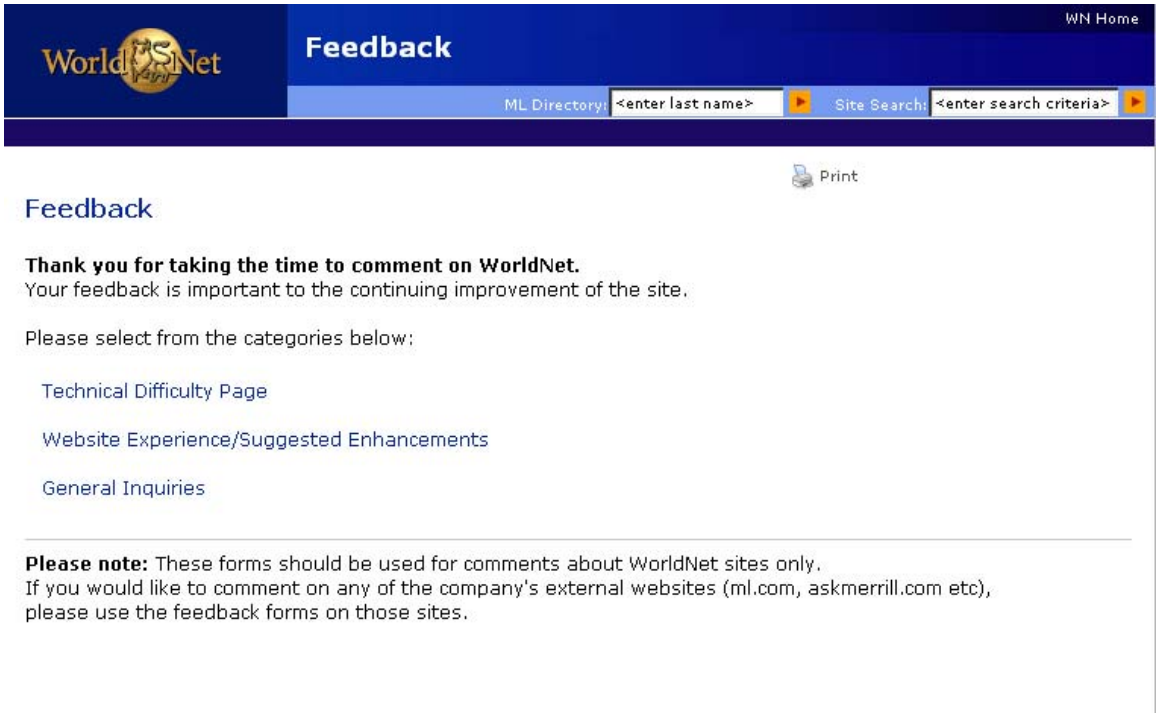
RESULTS

After the new intranet launched, there was an "unprecedented increase in traffic to and use of the Merrill Lynch corporate homepage," says Dooney. For example, homepage views increased by 475%, total visits increased by 160%, content and news archive access was up by 500%, and use of HR tools doubled or even tripled.

Today, thanks to the new intranet, "users are accessing more information, and using tools more easily and more quickly," Dooney says. Users have also praised features such as the new *ML Headlines*, a real-time news feed from CBSMarketWatch.com.

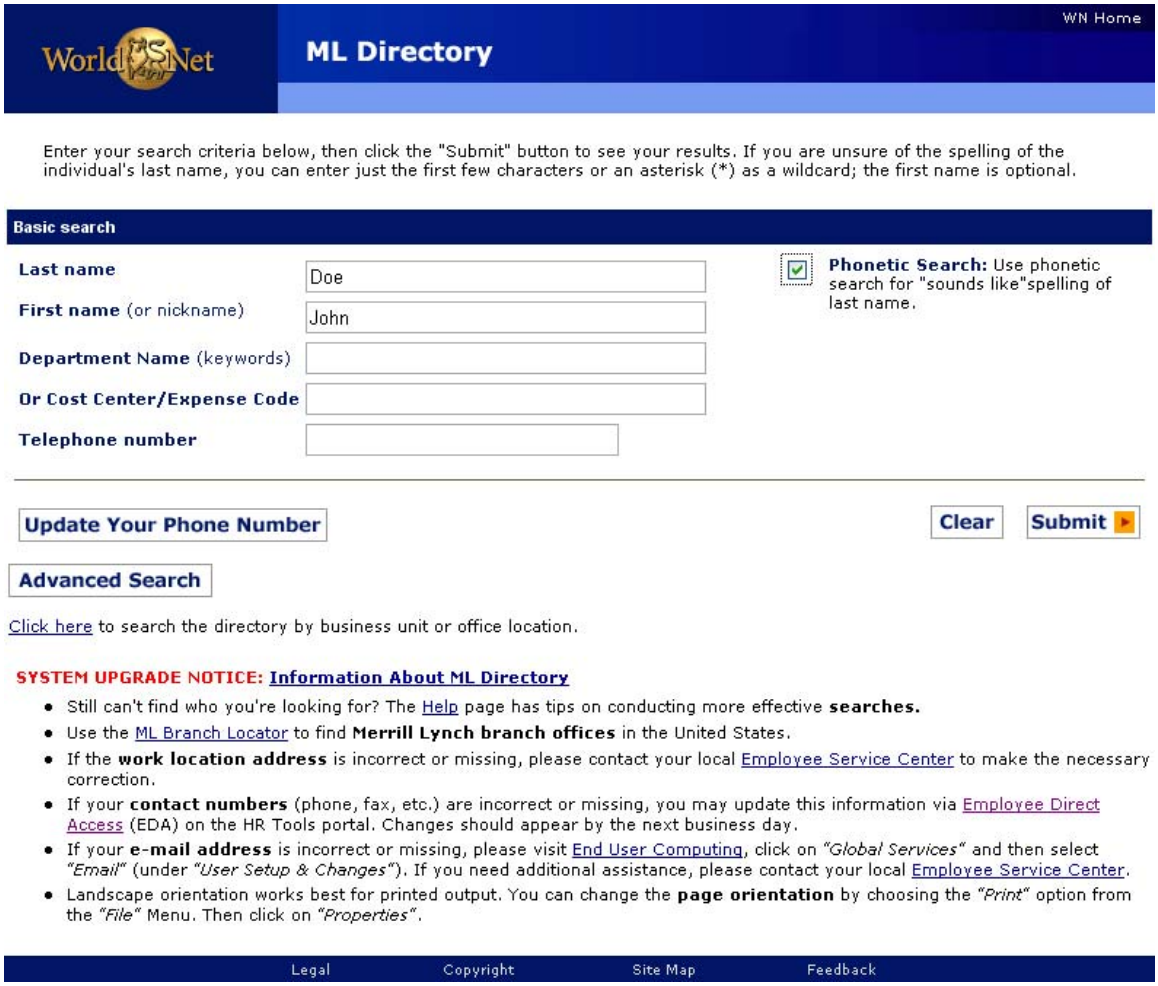
The time spent honing the navigation—through wireframe designs and card-sorting exercises—also paid off. "To date, this receives some of the highest usage" of any feature, post-redesign, notes Muirsmith.

Another effective feature redesigned for usability is the site-feedback tool, which helps the intranet design team continually improve the site.



Pictured: To continue to improve the WorldNet, the intranet team relies on user feedback. To foster such feedback, the intranet team guarantees it will respond to users' feedback within one working day.

Another redesigned tool is the employee directory, which must be featured on all WorldNet sites, per the company's intranet design guidelines.

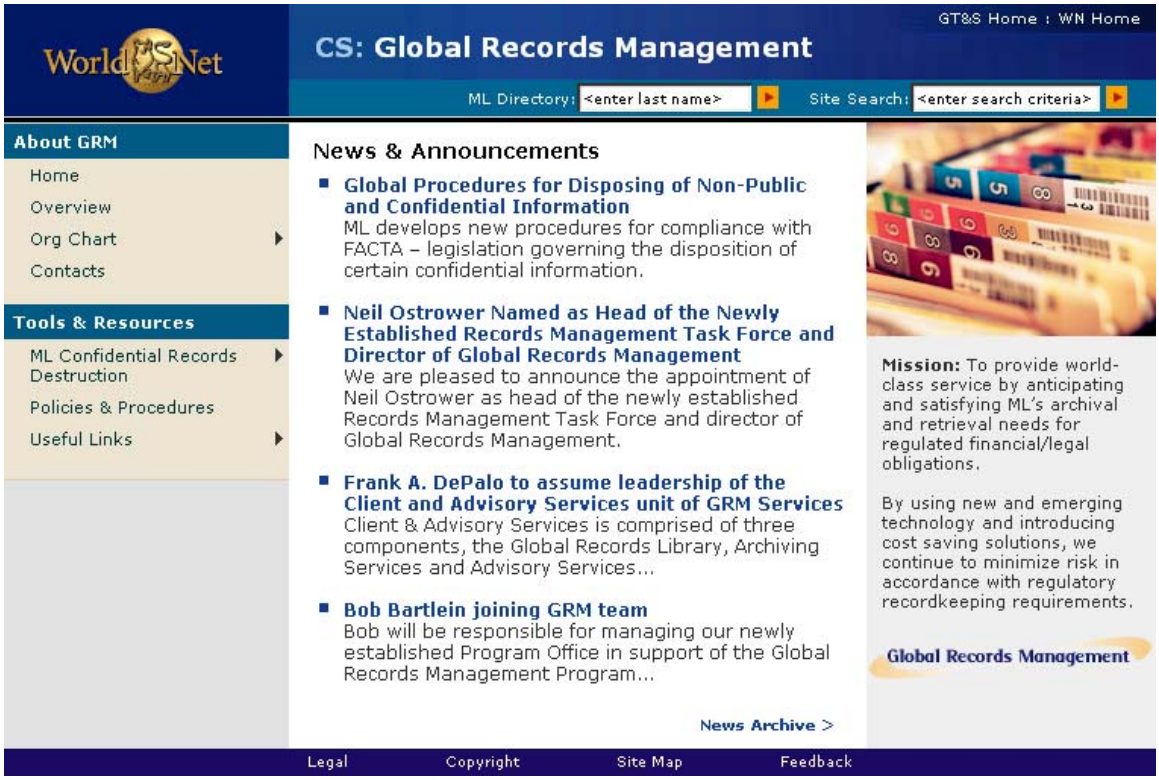


Pictured: All Merrill Lynch intranet sites must include access to the company directory. The directory adheres to the most recent WorldNet standards, including look and feel guidelines.

While different divisions are responsible for maintaining their own content, thorough guidelines ensure a consistent user experience.



Pictured: The homepage for *Global Technology & Services*, Merrill Lynch's main support organization. Users would typically arrive here after clicking a top-navigation link on the WorldNet homepage. Like all sites, this one applies the corporate intranet standards and guidelines, which nevertheless allow for modifications so divisions can communicate their own unique identities.



Pictured: A *Global Technology & Services* sub-page, *Global Records Management*, applies the GT&S business's intranet style while still remaining compliant with overall intranet guidelines.

LESSONS LEARNED

Insights from Kevin Dooney:

Don't navigate exclusively by corporate structure. "It's important to give users a navigation based on their needs, rather than just to mirror the corporate structure."

Keep it simple. "Never underestimate the power of simple, clean design."

Use graphics sparingly. "Only use graphics to illustrate key messages."

Write for the Web. "Always remember writing for the Web differs from writing for other mediums."

Insight from Jane Muirsmith:

Think big. "You can do a lot more than you think you can—with a little time and money—as long as you have committed, talented people alongside of you. A sense of humor also helps."

JPMorgan Chase & Co.

Using the intranet:
JPMorgan Chase is a leading global financial services firm with assets of $1.3 trillion and operations in more than 50 countries. The firm is a leader in investment banking, financial services for consumers and businesses, financial transaction processing, asset and wealth management, and private equity.

Headquarters:
The company's corporate headquarters is in New York City; its US retail financial services and commercial banking headquarters is in Chicago.

Number of employees the intranet supports:
178,000

Design team:
In-house

Members:
Alexandra Zawadiwsky, managing director and intranet champion; Jeanine Carlucci-McDonnell, employee portal manager and intranet sponsor; Nancy M Goebel, benchmarking and standards manager and intranet sponsor; Jeffrey Easton, user experience advocate; Gerben Hooykaas, senior Web designer; Phil Diol, user-centered designer; Janette Channell, technology liaison; Susan Korpela, project manager; Michael Welsh, technical lead; James Reilly, business liaison; Lori Pollan, business liaison; Craig Stabler, user experience manager; Dennis Deacon, intranet search product manager

SUMMARY

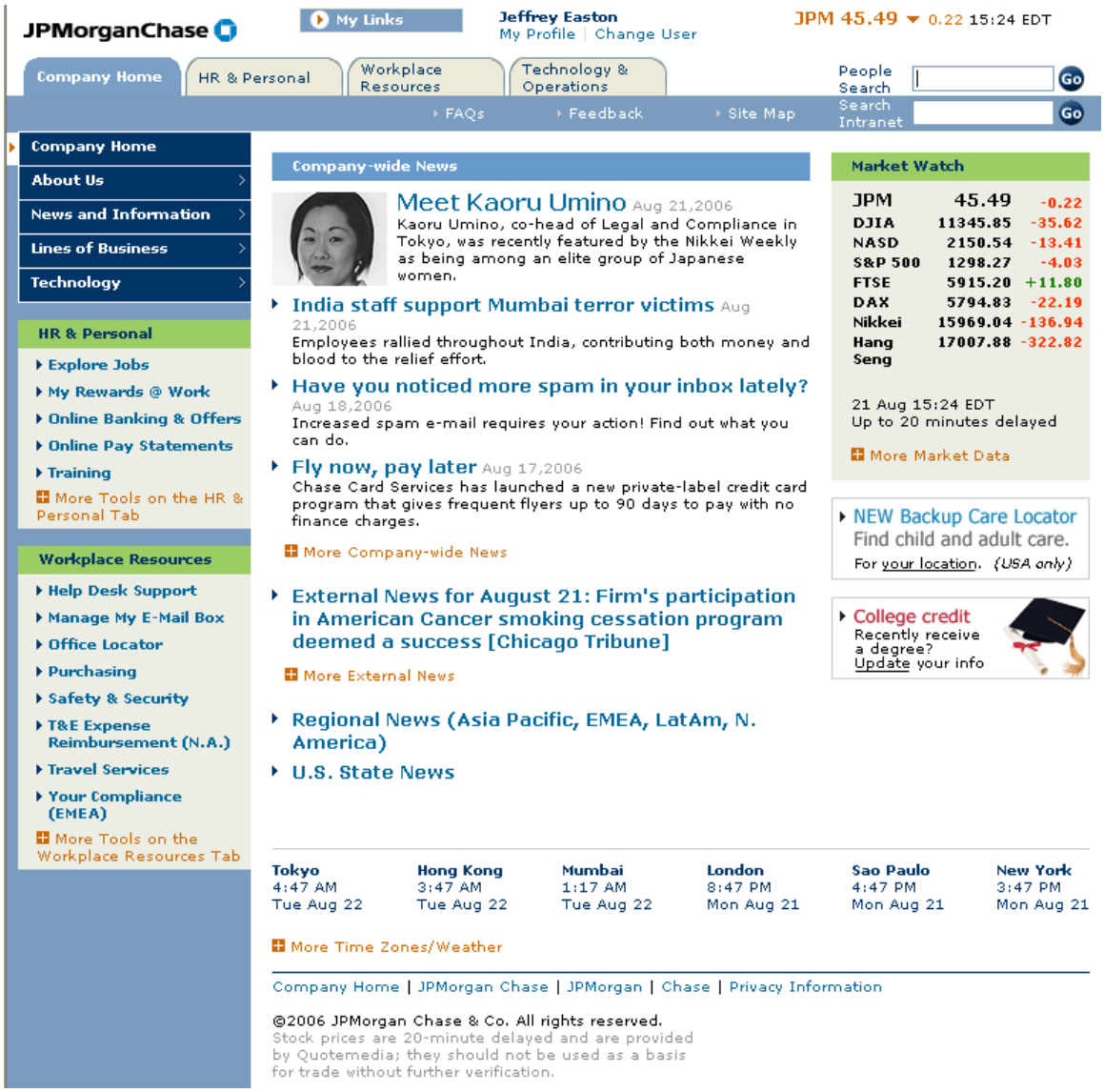
With a massive and diverse user base, the JPMorgan Chase intranet team faced a unique challenge in attempting to improve its intranet's user experience, while also lowering costs. Throw into the mix a merger, and creating a great design would seem unattainable. Yet, this team rose to the occasion, succeeding especially because of superb planning and a well-focused team.

With more that 620,000 page views per day and nearly 100,000 unique daily visitors, the intranet homepage makes an enormous impression on the firm's 178,000 employees. The intranet team is therefore highly selective about which and how many components it allows onto the page. Thus, the homepage, *Company Home*, displays only the most important news, especially in the foremost *Company-wide News* section. Users can link to a news page with more news, but designers are rightfully discerning with the homepage. Similarly, it limits *External News* offerings, but offers a teaser to encourage interested users to click for more.

Knowing that one homepage cannot be everything to everyone — from bank tellers to investment bankers — designers employed personalization features, serving up portlets personalized by region, state, and line of business. Also, users see their own personalized line-of-business tab — such as *Technology & Operations*, for example — as the last horizontal navigation tab. Users can also add their own favorite pages in the *My Links* area in the upper right. This lets users access their own most important items with one click on the homepage.

Other valuable features include *Market Watch*, which apprises users of how the stock is faring, and *World Times Zones*, which tells users what time it is for their colleagues in faraway places.

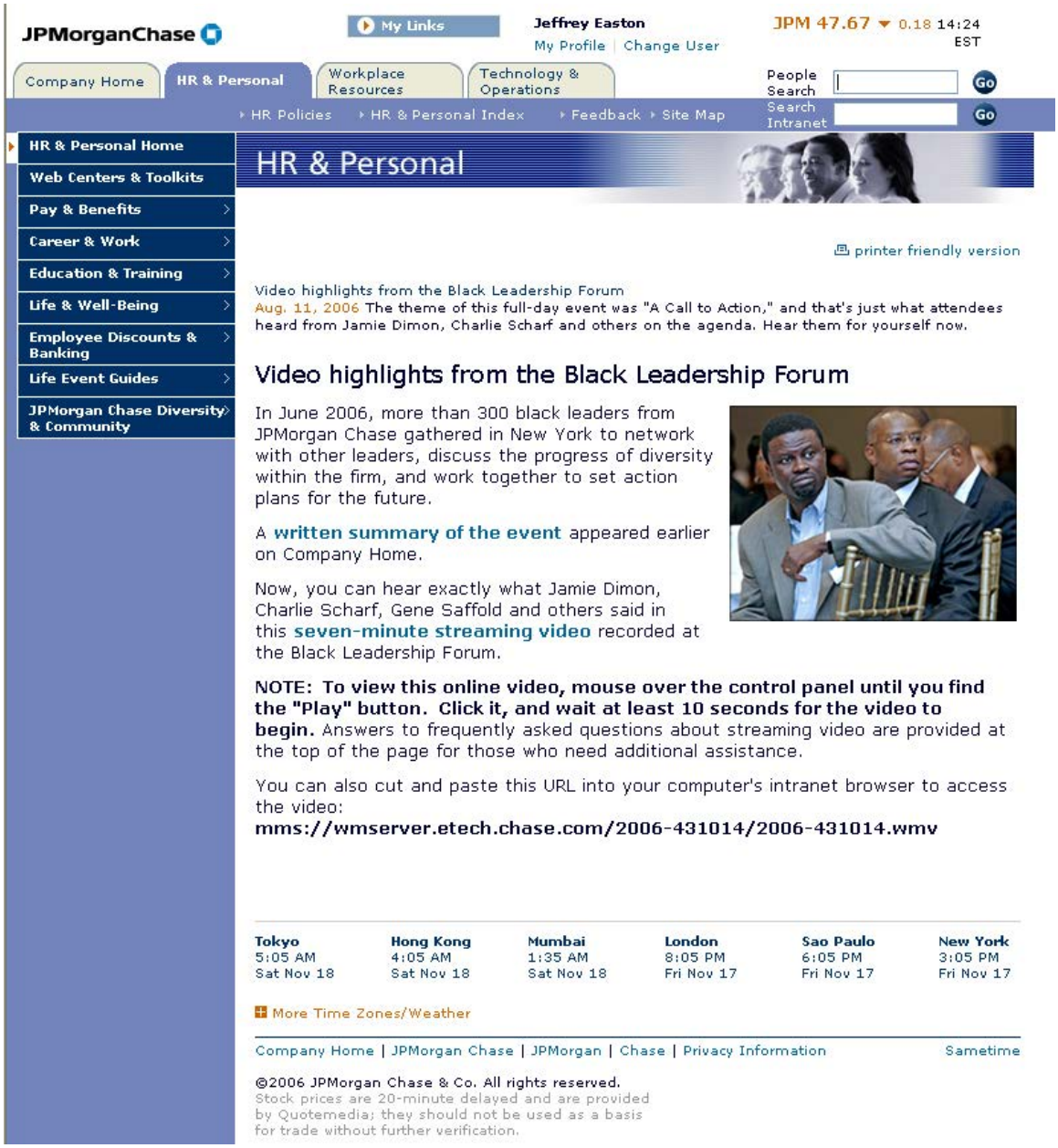
Overall, it's inspiring to see an organization this large keep the entire homepage above the fold. Doing so requires very acute planning and disciplined governance.



Pictured: Well-designed page structure, rules about homepage content, and personalization features keep the JPMorgan Chase homepage manageable and user-accessible.

The intranet includes written as well as visual communications, with video offered extensively throughout the site. Streaming video of actual people relaying news and information can make messages more potent and enduring; of course, it also provides a more human angle than text alone.

The JPMorgan Chase organization is committed to video communications, and has a centralized streaming media production team and streaming media server to match. On the intranet, video is primarily used for three purposes: training, introducing new marketing campaigns, and expanding access to important meetings and forums. For the meeting pages, designers provide a good textual summary of the meeting, a link to a full meeting summary, and a still photograph from the meeting. The page also provides simple instructions for playing the video, and a URL in case the link doesn't work.

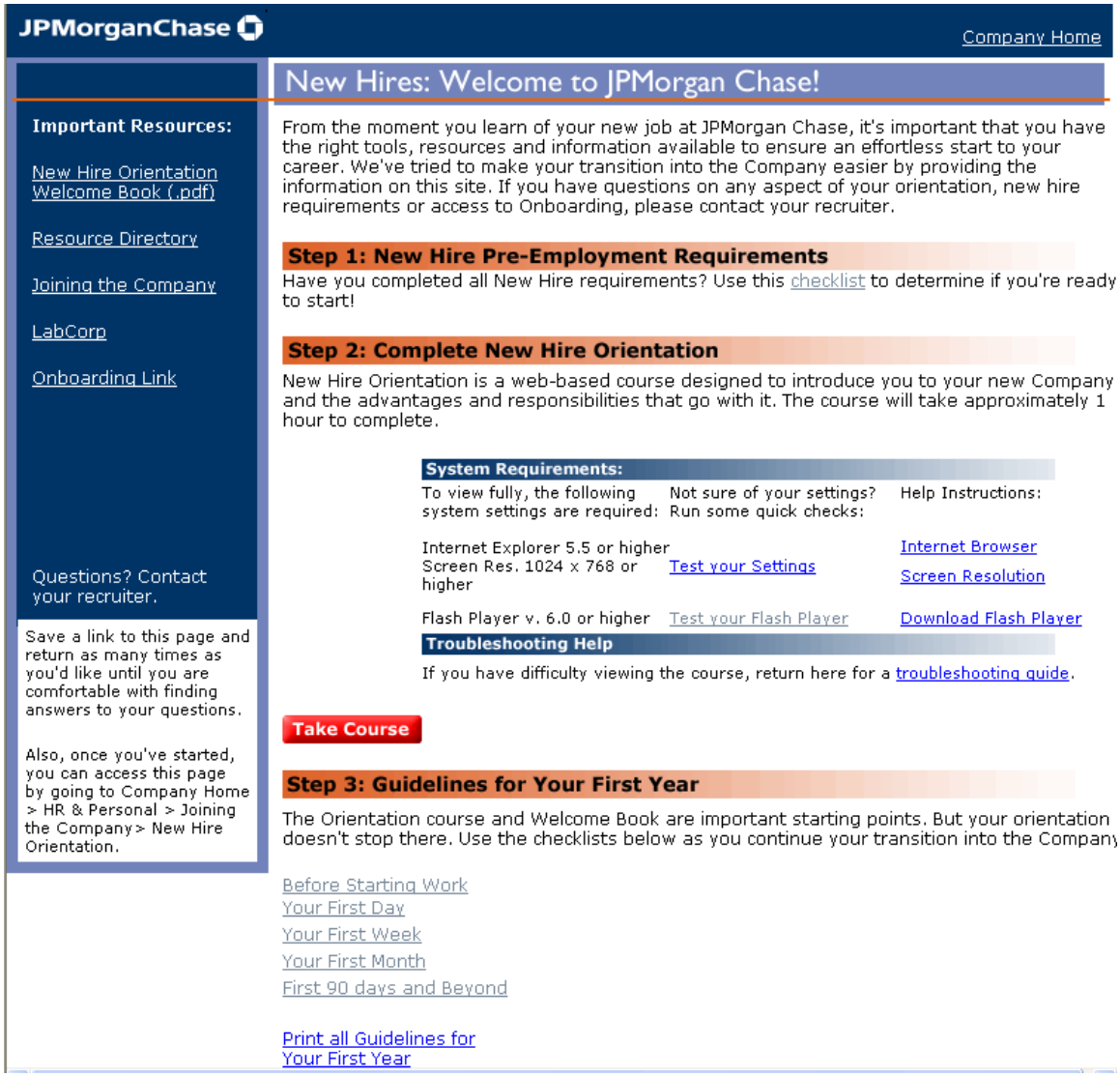


Pictured: This page highlights video from a meeting, and provides a written summary, photographs, and instructions for playing the video.

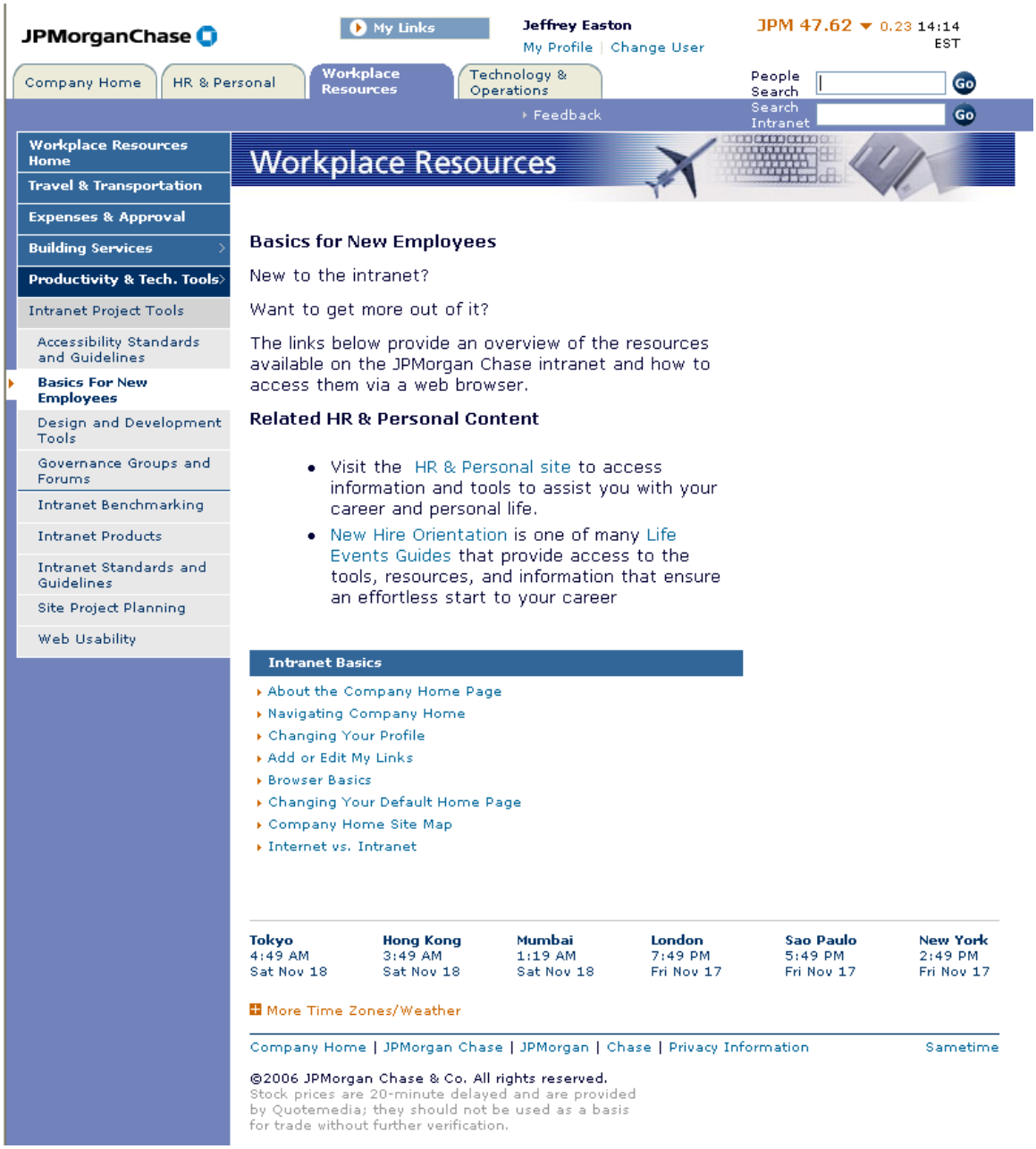


Pictured: An example of a marketing video on the intranet.

The intranet also caters extremely well to new employees, offering them all the basic information they could need. One intranet section is specifically dedicated to new hires, and suggests items that new users might not readily discover. This is a worthy service for people who are adapting to a new environment. Another section provides tips on how to personalize the intranet experience.



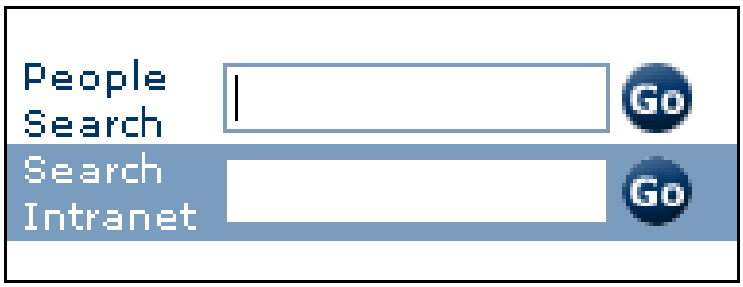
Pictured: An intranet section for new hires helps them navigate new-hire forms and orientation, and even suggests things to do during their first year at the organization.



Pictured: A productivity and technology portion of the new-hire section helps new employees learn such things as how to use the intranet to its full potential.

Both searching the intranet and finding people at an organization are important tasks, and warrant dedicated space on every intranet page. Having two searches exist harmoniously, however, can be difficult. At JPMorgan Chase, intranet designers have helped make these features easy to use by stacking the corporate directory and site search fields. Both are in the upper-right part of all intranet pages. Thus, users can easily find either search and quickly distinguish between the two. The terminology used, *People Search* and *Search Intranet* fields, each followed by *Go* buttons, also help make these tasks more efficient for users. These design choices

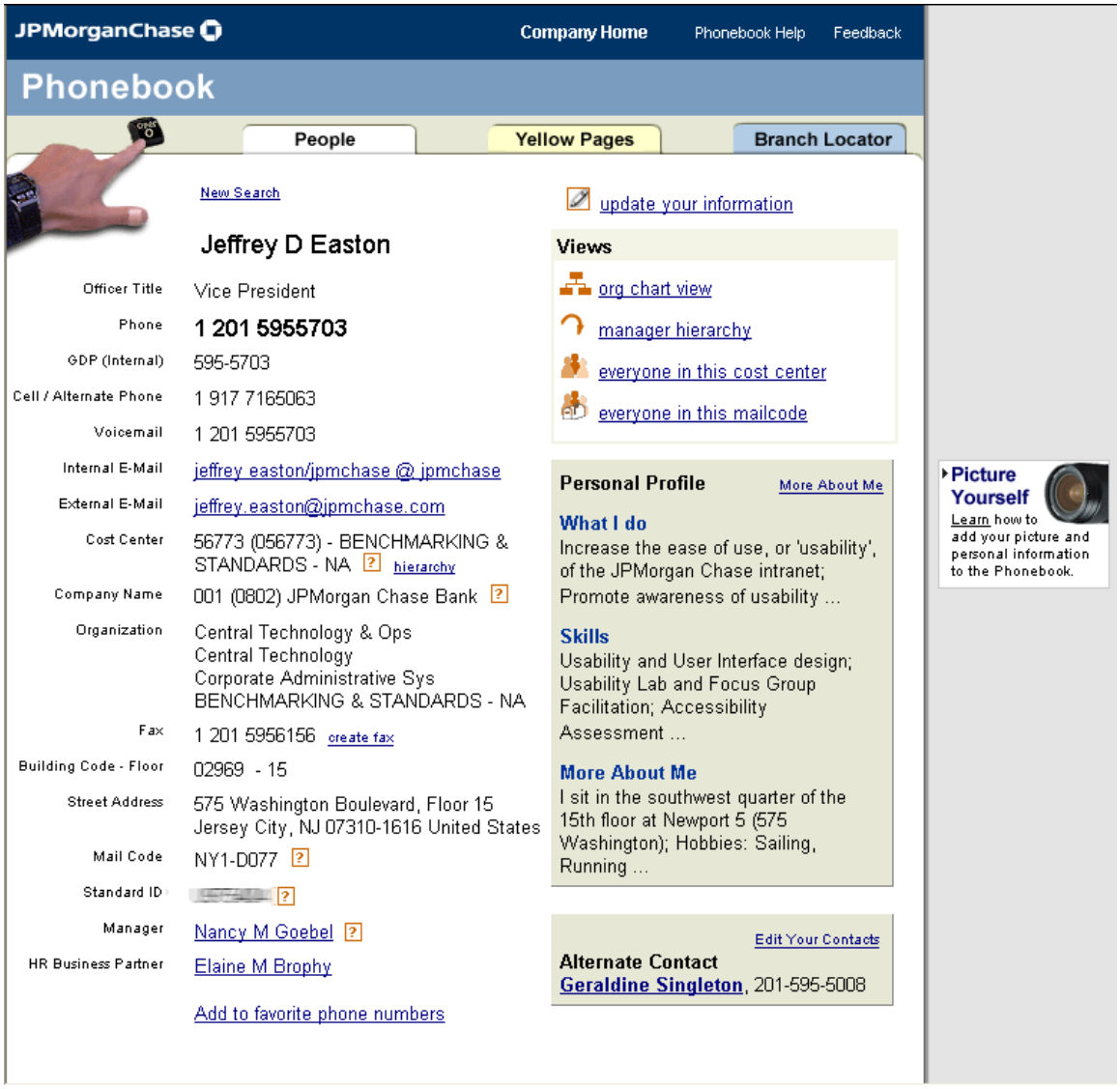
might seem relatively simple, yet many simple-seeming choices can add up to a vastly better user experience.



Pictured: By stacking and clearly labeling the employee and site search boxes, users can easily find and distinguish between the two search types.

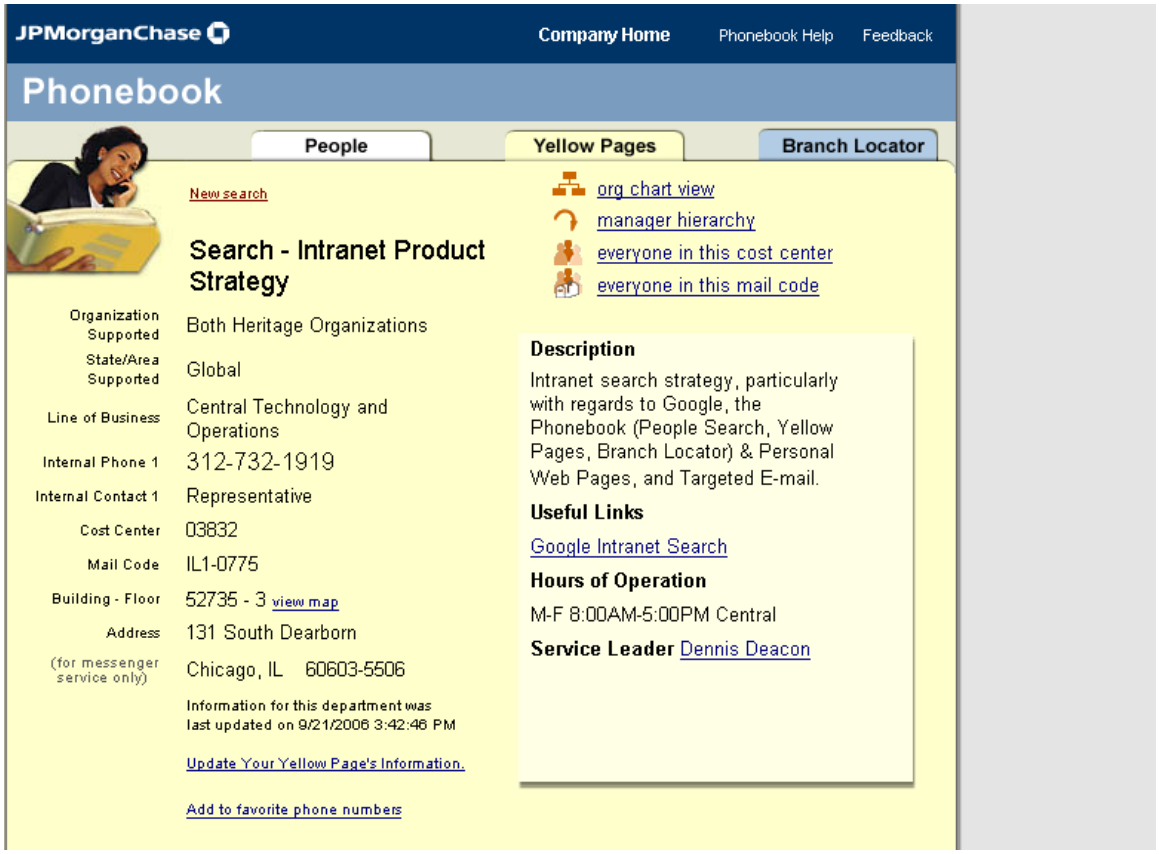
Once users find the employee they're looking for, the system displays a document, packed with such information as the person's name, title, e-mail, phone, organization, and location. Users also have a *Personal Profile*, which the search engine indexes for keywords; this is especially helpful for employees looking for topic experts. The alternate contact name and number is a very useful addition, especially for JPMorgan Chase's large, dispersed, and often mobile workforce.

Employees can also create a personal Web page. If they do, a link to it appears on their profile.



Pictured: In an employee profile document, user's typical information — such as name, telephone number, and e-mail address — is supplemented with keywords, summary, and a link to the person's personal Web page.

The *Yellow Pages* tab leads to an area where users can search for groups within the organization. This is helpful when users know they need to talk with someone in a particular department, but don't know whom to call.



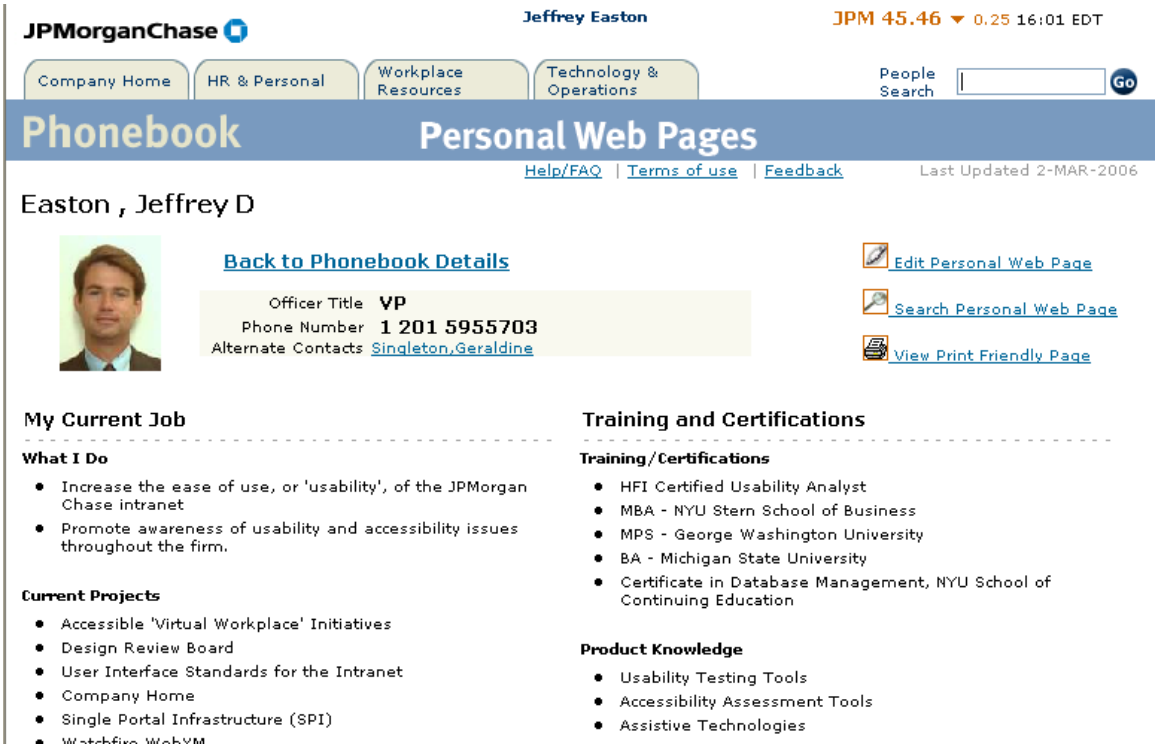
Pictured: Users can search the *Yellow Pages* for groups within the organization.

Telephone banking representatives who support external customers often use the *Branch Locator* tab within the intranet *Phonebook*. In retail banking, having specific information germane to each bank branch is essential; the *Branch Locator* meets this need in a straightforward, easy-to-use way.



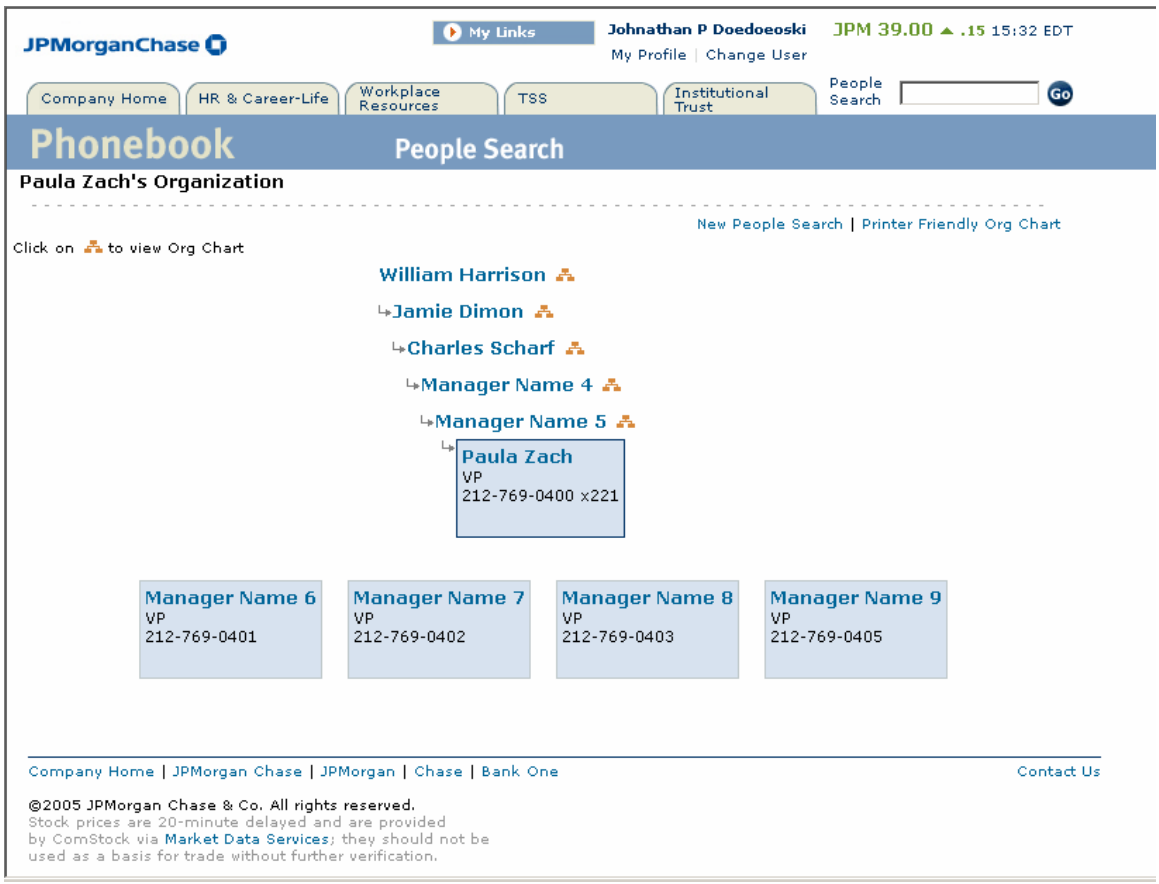
Pictured: The *Branch Locator* in the *Phonebook* is especially helpful for the telephone banking representatives who communicate with customers.

On personal Web pages, users can add — among other things — pictures of themselves and information about their jobs, projects they're working on, training and education, and the company products they're familiar with. This information can help people find the appropriate personnel resources for a particular job.



Pictured: An example of a personal Web page, which includes a photo and useful information about the person's job, projects, and training.

From any particular person document, a user can see where a person fits within the company by viewing an organizational chart. This *Phonebook* organizational chart is hierarchical; the selected person is distinguised by an outlined box in the middle of the chart. The names of the person's manager, the manager's manager, and so on, appear above this box. The small, yellow organizational chart icons link directly to that individual's org chart.



Pictured: Users can click a link to this org chart via a person document. The selected person appears in the middle of the chart.

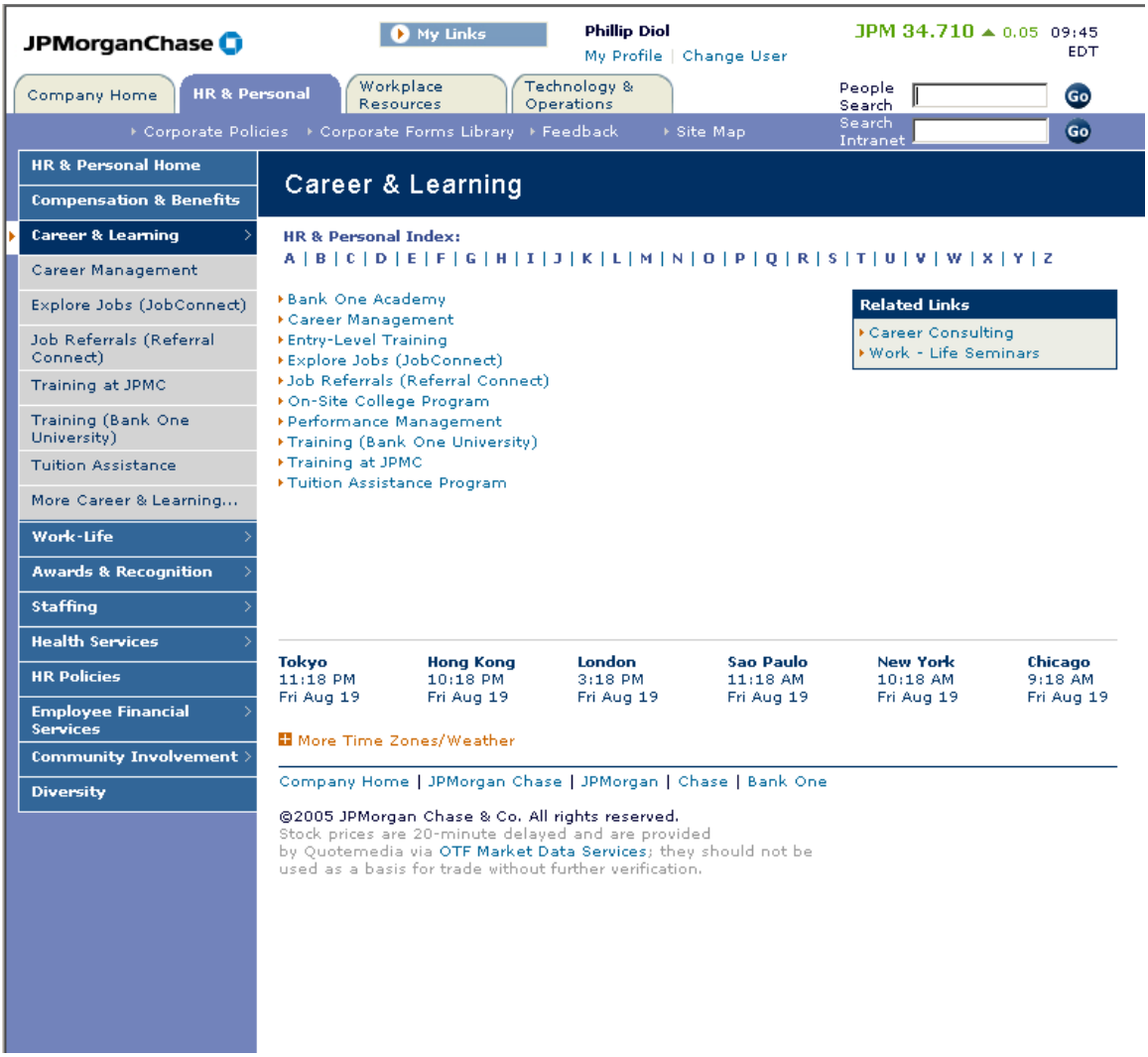
Speaking of org charts, an especially important area for any intranet is the HR section. At large companies such as JPMorgan Chase, having a great user interface for the HR section can literally save hundreds of thousands of dollars in support time and phone calls to HR representatives.

Appropriately, this intranet presents HR information — and quite a lot of it — in an extremely well-organized manner. Designers made a clever choice in giving prominence to the *HR & Personal* section by making it one of the few top-level navigation tabs. Within this section, users can easily find what they need in the main page's content area because sections are well defined spatially and have lucid titles, including *Events & Reminders, Health & Wellness,* and *Career Growth. My Personal Toolkit*, meanwhile, presents users with personalized HR information.



Pictured: The main HR page provides users with essential information, much of it available through links right on the section's homepage.

In the left-hand navigation, users see a honed list of HR-related areas. Designers took care to keep the menu's length somewhat short (less than 10 items). Creating sub-menus that open in place is a very helpful interface choice for many types of users. The color change of the selected menus, from light blue to dark blue, denotes the selected section, while the sub-menu itself appears as a gray box, which helps users stay focused on their options and identify what they need.

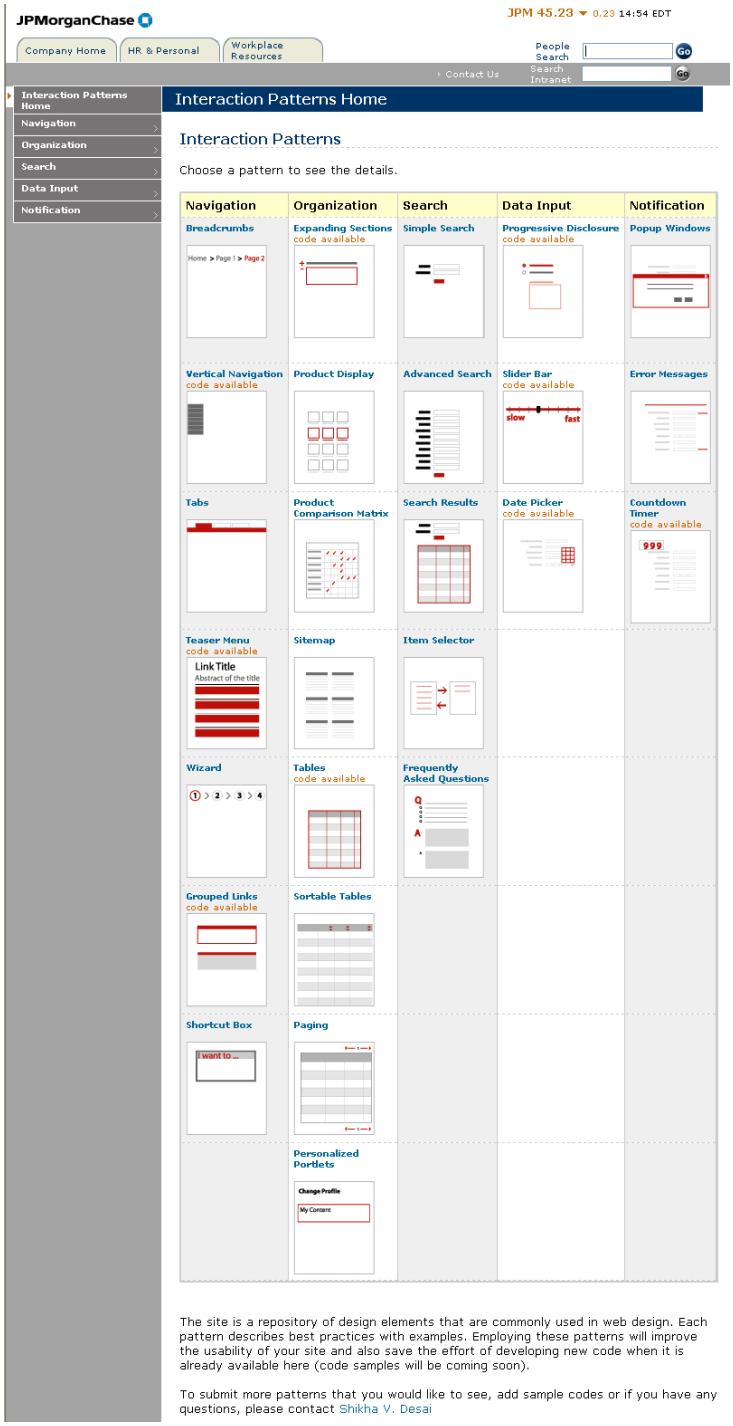


Pictured: Well-organized menus help users locate the HR information they need.

After JPMorgan Chase merged with Bank One in 2004, the intranet team needed to integrate both intranet sites. Accordingly, it took several steps. One very important step was to establish a Design Review Board (DRB) to govern and update the intranet's user interface standards. This same team was then tasked with reviewing the new site and application designs for compliance with those standards.

Another important innovation was to create an application that let designers easily create standards-compliant prototypes for requirements gathering and user testing. This excellent online wizard walks people through using the standard page templates, then creates HTML prototypes — complete with working navigation. The tool automatically produces detailed design and functional specifications, as well as the CSS and XHTML code developers need. This method is a fabulous time-saver and ensures design consistency.

The intranet team also took steps to help designers and developers help themselves. The *Interaction Patterns Library* houses standard code samples, which developers always find priceless.



Pictured: To assist designers and developers in designing standard, compliant pages and applications, the intranet team created an *Interaction Patterns Library*, which includes standard code samples. Such "reusable" code has proved invaluable to developers.

While having such online resources is priceless, in some cases, face-to-face training is also extremely useful. The team therefore decided to train a select group of users to be usability advocates within their organizations. More than 60 employees completed an intensive 10-day course on user-centered design.

All such efforts have produced many payoffs. For example, the intranet team has already brought more than 90% of the major line-of-business sites into basic compliance with the intranet design standards, and avoided at least $14 million in costs by consolidating multiple intranet environments into a single, shared one.

That's the kind of ROI most intranet redesign teams wish they could report. How did JPMorgan Chase do it? Beyond crafting an engaging design, never underestimate the power of planning. While careful planning and carefully designed intranet standards might seem costly, time-consuming, or perhaps just painful, JPMorgan Chase's intranet, and the project results, illustrate how getting these details right — from the project's start — lays the necessary groundwork for creating an intranet that truly meets both users' needs and the needs of the business, with accompanying metrics to prove it.

URL AND ACCESS

The URL for the JPMorgan Chase intranet is http://intranetportal.jpmorganchase.com/portal/index.jsp. All but two of the firm's businesses bookmark the company's homepage as their employees' default browser start page. Businesses that specialize in direct customer contact are often exceptions, though employees can still easily access the homepage via the Global Common Element (GCE), found (as the name implies) on every page.

When away from the corporate LAN, users can access the intranet via VPN. Users can also access some sites and applications — mostly HR-related — by using a browser and their normal intranet log-on credentials.

JP Morgan Chase installs kiosks wherever it has large concentrations of employees without computer access. In addition, shared computers in the bank's retail branches allow branch staff to access the intranet.

CONTENT MANAGEMENT

Distributed Content, Controlled Templates

The entire intranet's CMS is Vignette, which supports decentralized content authoring. "We do not customize the content management system on a site-by-site basis," notes Janette Channell, technology liaison for the Shared Services Groups (SSG). This helps reduce intranet-related costs and makes the site easier to support.

JPMorgan Chase relies on approximately 200 content providers for all of its line-of-business and corporate group intranet sites, and the CMS restricts their ability to alter page design. "Content creators used to control the design and organization of intranet content, and this resulted in an intranet that was poorly organized and full of duplicate and outdated or inaccurate and misleading information," says Jeffrey Easton, SSG's lead user experience advocate. "Ethnographic studies, card sorts, and usability labs showed that end users had different expectations for how the intranet should be organized, so we decided to come up with an arrangement that allowed content creators to focus on the content and let the users determine the information architecture and user interface."

Intranet Design Review Board Sets Standards

An intranet DRB specifies user interface standards for all intranet sites. "These standards are available on the intranet and include links to standard-compliant reusable code and other related standards and guidelines," says Easton, who chairs the DRB.

The board includes subject matter experts in usability, accessibility, Web application development, corporate branding, and the law. “Its goals are to interpret, expand, change, and grant exceptions to the user interface standards,” he says. “Proposals for changes or requests for exceptions come to the DRB; we then conduct user testing and other research to determine if the request should be accepted, tweaked, or denied.”

Prototype Toolkit Helps Enforce Templates

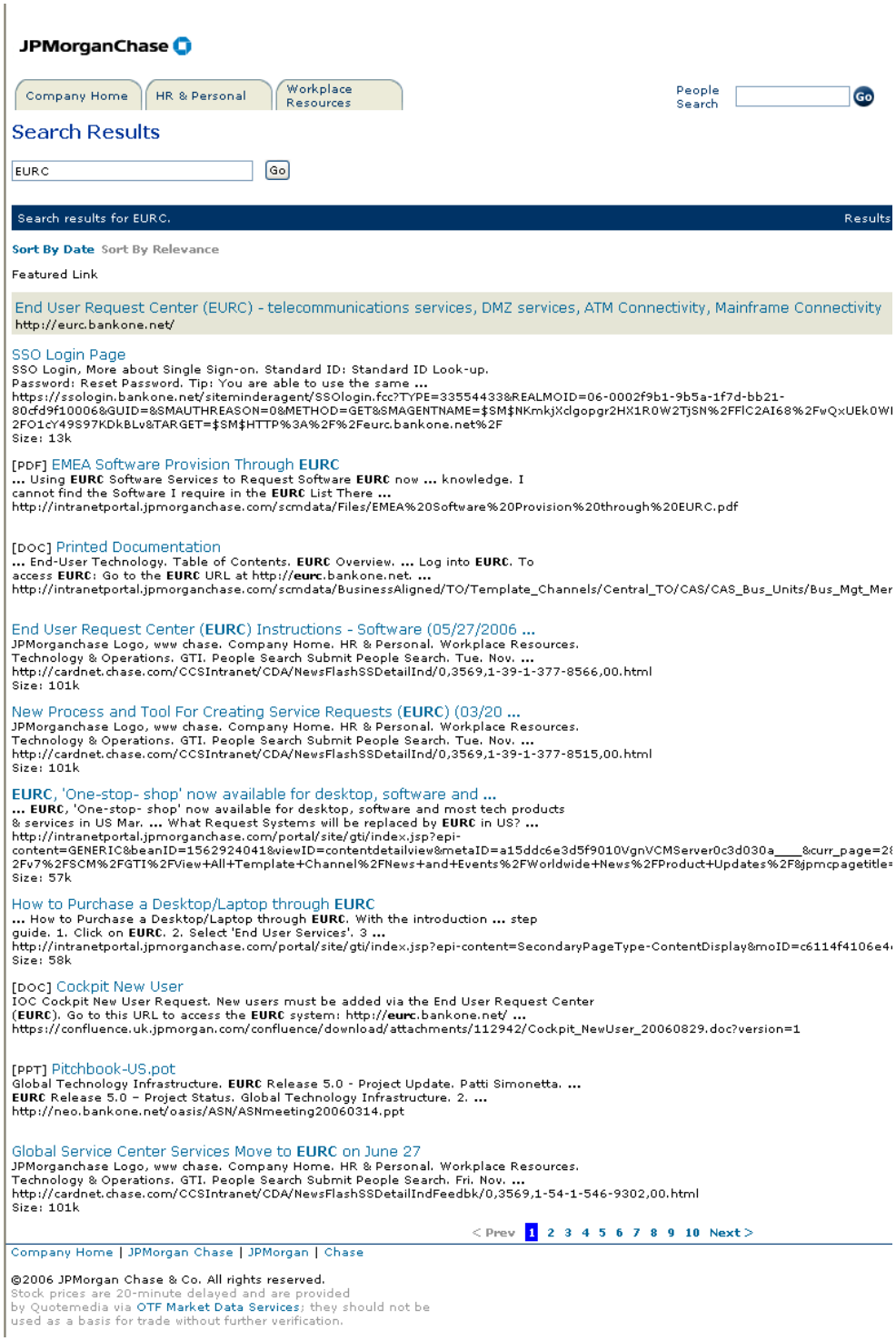
In previous intranet versions, managing the many different page templates in use was challenging. “Initial attempts at enforcing a standard set of templates did not work: individual development groups would customize them to fit their ‘client’s’ requirements,” says Easton. “We soon realized that we needed a comprehensive plan for ensuring a single set of design templates on the intranet.”

TECHNOLOGY

The Web tier of the Enterprise Portal uses Sun V480s running IPlanet Webservers on Solaris 8. The application tier uses Sun F15K domains running VAP 4.5.1 with Weblogic Portal 6.1 on Solaris 8. The database tier also uses SUN F15K running Oracle 9.2 on Solaris 8. The CMS is Vignette (VCMS 7.3.05) with Weblogic Server 8. The company uses the Mercury suite of software testing tools for bug tracking and automated load testing.

Google technology handles enterprise search and the intranet team also studies top searches. “We use both the search logs and a metrics program, Omniture Sitecatalyst, to track search activity and search terms used,” says Dennis Deacon, the intranet search product manager.

For ensuring optimal search results, context is everything, he notes. “Pages must have quality content that contains the terms that users would search on, and descriptive and unique page titles for the search results to be relevant. Some of the content management systems in use on the intranet do not require page titles, which means the page URL becomes the title. This, and a lack of awareness by content authors, can degrade search relevancy — and content quality.”



JPMorganChase

Company Home | HR & Personal | Workplace Resources

People Search Go

Search Results

EURC Go

Search results for EURC. Results

Sort By Date Sort By Relevance

Featured Link

End User Request Center (EURC) - telecommunications services, DMZ services, ATM Connectivity, Mainframe Connectivity
http://eurc.bankone.net/

SSO Login Page
SSO Login, More about Single Sign-on. Standard ID: Standard ID Look-up.
Password: Reset Password. Tip: You are able to use the same ...
https://ssologin.bankone.net/siteminderagent/SSOlogin.fcc?TYPE=33554433&REALMOID=06-0002f9b1-9b5a-1f7d-bb21-80cfd9f10006&GUID=&SMAUTHREASON=0&METHOD=GET&SMAGENTNAME=SMNKmkjXclgopgr2HX1R0W2TjSN%2FFlC2AI68%2FwQxUEk0WI2FO1cY49S97KDkBLv&TARGET=SMHTTP%3A%2F%2Feurc.bankone.net%2F
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http://intranetportal.jpmorganchase.com/scmdata/BusinessAligned/TO/Template_Channels/Central_TO/CAS/CAS_Bus_Units/Bus_Mgt_Mer

End User Request Center (EURC) Instructions - Software (05/27/2006 ...
JPMorganchase Logo, www chase. Company Home. HR & Personal. Workplace Resources. Technology & Operations. GTI. People Search Submit People Search. Tue. Nov. ...
http://cardnet.chase.com/CCSIntranet/CDA/NewsFlashSSDetailInd/0,3569,1-39-1-377-8566,00.html
Size: 101k

New Process and Tool For Creating Service Requests (EURC) (03/20 ...
JPMorganchase Logo, www chase. Company Home. HR & Personal. Workplace Resources. Technology & Operations. GTI. People Search Submit People Search. Tue. Nov. ...
http://cardnet.chase.com/CCSIntranet/CDA/NewsFlashSSDetailInd/0,3569,1-39-1-377-8515,00.html
Size: 101k

EURC, 'One-stop- shop' now available for desktop, software and ...
... EURC, 'One-stop- shop' now available for desktop, software and most tech products & services in US Mar. ... What Request Systems will be replaced by EURC in US? ...
http://intranetportal.jpmorganchase.com/portal/site/gti/index.jsp?epi-content=GENERIC&beanID=1562924041&viewID=contentdetailview&metaID=a15ddc6e3d5f9010VgnVCMServer0c3d030a____&curr_page=2
2Fv7%2FSCM%2FGTI%2FView+All+Template+Channel%2FNews+and+Events%2FWorldwide+News%2FProduct+Updates%2F&jpmcpagetitle=
Size: 57k

How to Purchase a Desktop/Laptop through EURC
... How to Purchase a Desktop/Laptop through EURC. With the introduction ... step guide. 1. Click on EURC. 2. Select 'End User Services'. 3 ...
http://intranetportal.jpmorganchase.com/portal/site/gti/index.jsp?epi-content=SecondaryPageType-ContentDisplay&moID=c6114f4106e4
Size: 58k

[DOC] Cockpit New User
IOC Cockpit New User Request. New users must be added via the End User Request Center (EURC). Go to this URL to access the EURC system: http://eurc.bankone.net/ ...
https://confluence.uk.jpmorgan.com/confluence/download/attachments/112942/Cockpit_NewUser_20060829.doc?version=1

[PPT] Pitchbook-US.pot
Global Technology Infrastructure. EURC Release 5.0 - Project Update. Patti Simonetta. ...
EURC Release 5.0 – Project Status. Global Technology Infrastructure. 2. ...
http://neo.bankone.net/oasis/ASN/ASNmeeting20060314.ppt

Global Service Center Services Move to EURC on June 27
JPMorganchase Logo, www chase. Company Home. HR & Personal. Workplace Resources. Technology & Operations. GTI. People Search Submit People Search. Fri. Nov. ...
http://cardnet.chase.com/CCSIntranet/CDA/NewsFlashSSDetailIndFeedbk/0,3569,1-54-1-546-9302,00.html
Size: 101k

< Prev 1 2 3 4 5 6 7 8 9 10 Next >

Company Home | JPMorgan Chase | JPMorgan | Chase

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Stock prices are 20-minute delayed and are provided by Quotemedia via OTF Market Data Services; they should not be used as a basis for trade without further verification.

Pictured: The search results page below shows the results for the acronym “EURC.” Note how Google returns the meaning of the acronym and shows the document type, as well as highlighting the search term.

REDESIGN GOALS AND CONSTRAINTS

Goals:

- **Lower costs.** The redesign's overriding goal was to reduce the intranet's operating costs by consolidating intranet sites onto a centralized set of servers. "But SSG also saw this as an opportunity to create a single, consistent user interface," says Jeanine Carlucci-McDonnell**,** SSG's enterprise portal group manager. This would make the entire intranet easier to use.

Constraints:

- **No mandate for change.** "We did not have a mandate, so we needed to convince the various lines and sub-lines of business that it was in their best interests to leave their current environments — where they had complete control over design and functionality — and move onto a common platform, with very little differentiation in look and feel between sites," says Carlucci-McDonnell.

BASIC INTRANET FEATURES

Principle Features

One of the principle features of the JPMorgan Chase intranet is clear navigation, in large part because of the GCE located on the intranet homepage. The GCE appears on intranet sites that have "on-boarded" to the enterprise portal, as well as on other sites on a subscription basis. "Although having a standard header may not be considered a unique idea, its adoption and usable and valuable features do help make our intranet stronger and more cohesive," notes Phil Diol, SSG's Web design expert and user experience advocate.

With the GCE, all employees have ready access to intranet and people search, and see three tabs — *Company Home*, *HR & Personal*, and *Work Place Resources*. The latter two are resource index pages, carefully designed to provide resources organized by events, topics, and alphabetical listings. Users are also provided with a tab for their own line of business. "This is set in their intranet profile when they log on the first time, so employees have what's most relevant to them and the company at their fingertips," notes Diol.

Homepage features include a stock quote, which provides quick insight into the company's financial performance, and the *Phonebook*, which is used by an average of 70,000 employees daily.

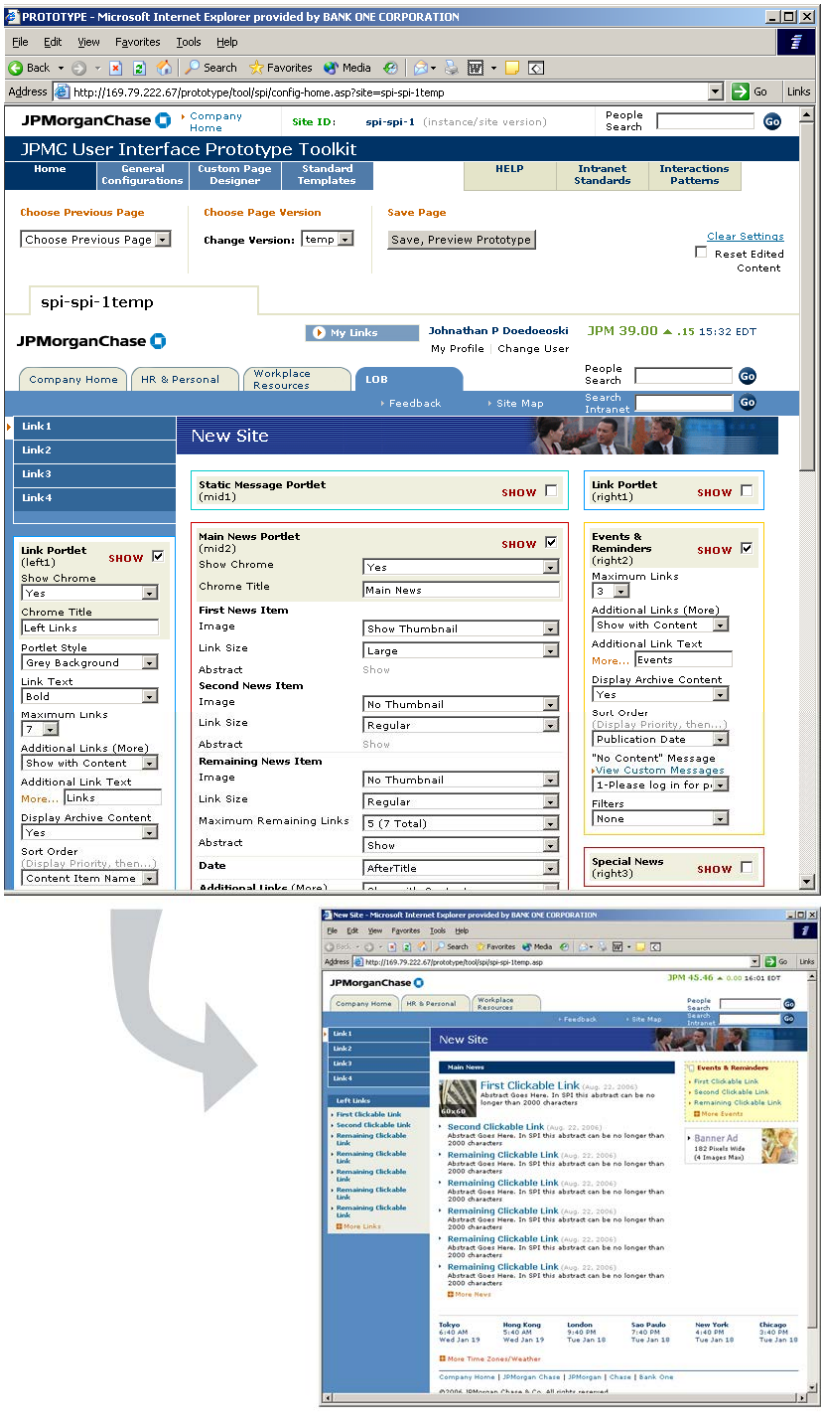
Overall, "many mission-critical tasks can only be accomplished via the intranet, including benefits enrollment, getting your pay stub — employees no longer get paper stubs — and finding relevant policies and procedures," says Easton. "During emergencies, the *Company Home* site is the page that all the warnings and instructions are to be found on. There is a hidden portlet at the top of the content section that opens up when critical information needs to go to all employees in a region or the firm. For example, when the London subway was bombed, information on building closures and security measures was displayed in this area, as well as the welfare of any employees involved."

New employees have a dedicated intranet section. "This is the outcome of a study done a few years ago that identified the 'employee on-boarding' process as something where costs could be lowered and efficiency improved by moving everything to the intranet," notes Easton.

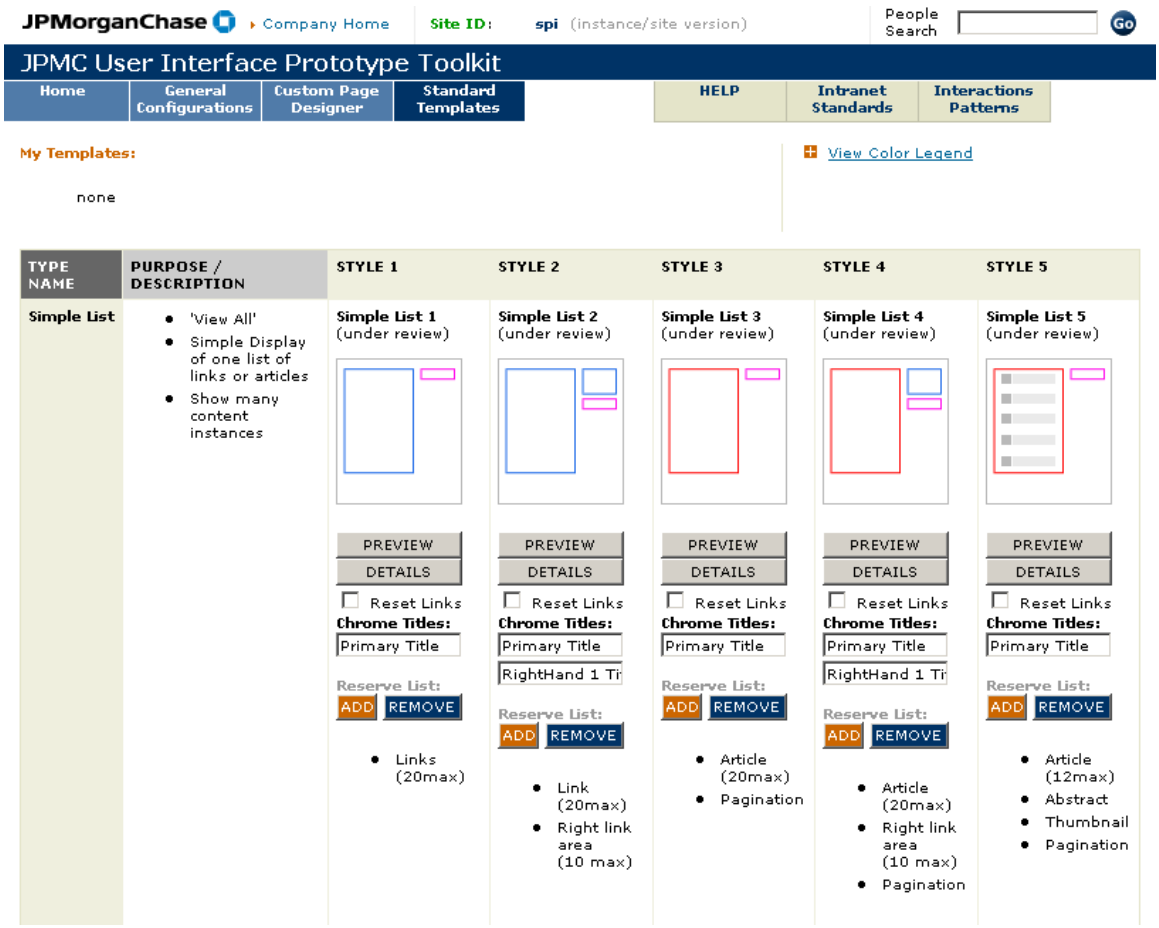
Tool Facilitates Enterprise Portal "On-Boarding"

"A specific application we want to emphasize is a homegrown 'onboarding' tool," says Diol. The application, also known as the Prototype Tool, was created in 2005 to help streamline portal creation efforts. The tool helps four types of users:

- **Enterprise portal clients:** Enables business groups becoming a part of the enterprise portal to easily access the standard template library and easily preview their new intranet site, facilitating increased buy-in.
- **Enterprise portal staff:** While clients preview their new intranet site, the Prototype Toolkit generates all necessary CSS. "Any custom presentation requests can be performed on a CSS level, rather than portal configuration level," says Diol, speeding development efforts. "The tool helped reduce a 10-week on-boarding process to two weeks."
- **User-centered designers:** The Prototype Toolkit lets the company focus more on user-centered design. First, the preview tool eliminates the need to develop wireframe models, which can be a "cumbersome and inefficient" process, says Diol. In addition, previews — in reality, prototypes — can be tested immediately with users and quickly refined. Finally, the templates take much of the guesswork out of interpreting the company' UI standards.
- **Business groups not "on-boarding" to the enterprise portal:** Inevitably, some business groups needed to develop intranet sites, but were not able to fit the "portal on-boarding schedule" into their timeline. "When this is necessary, we want to provide standardized UI options and resources," says Diol. Accordingly, the Prototype Toolkit will generate the CSS, HTML, and scripts also used to help build portal-compliant sites. This speeds development, reduces guesswork, and "also puts them in a better position when they are ready to on-board to the portal."



Pictured: The user interface Prototype Toolkit facilitates “on-boarding” of pages into enterprise portal platform by offering clients certain page layout configurations, all of which are tied to specific UI standards. As a result, new pages require much less management time.



Pictured: The intranet's standard template library includes a full array of standard page templates. Clients choose from predefined page layouts, reducing the time needed to ultimately get their pages live on the portal.

USERS

The intranet serves approximately 178,000 employees and consultants worldwide.

The intranet's user base, however, is extremely diverse, ranging from tellers to investment bankers and from call center representatives to administrative assistants. Users typically access the intranet several times a day to look up colleagues' numbers, enter travel expenses, look up benefits information, and read the latest news about the firm, their line of business, or their region. The intranet is also the home of many of the trading, market data, and customer information systems that users need to do their job.

USER TASKS

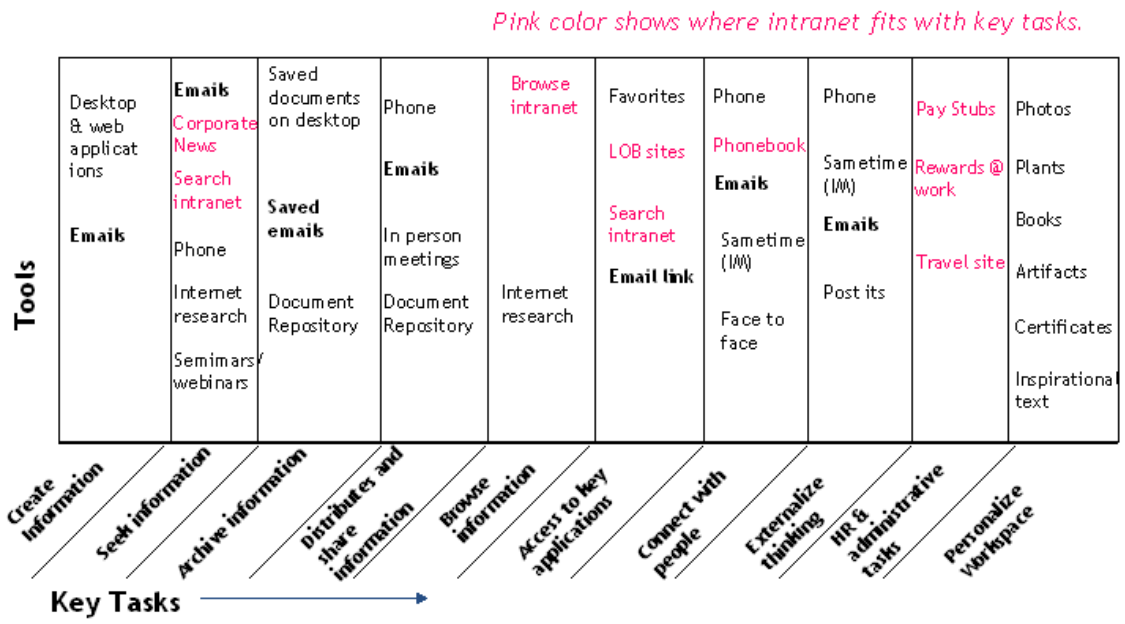
How do JPMorgan Chase's employees use the intranet? To find out, "we conducted a rather expansive ethnographic research initiative this year," notes Diol. "It involved interviewing and observing many employees within different lines of business and with different roles."

According to the research, the top four tasks (in order) are:

- Use the *Phonebook*
- Conduct an intranet search (looking for specific applications and acronyms)
- Find specific *HR & Personal* resources (pay stubs, benefits information)
- Read *Company-wide News*

The research also identified common secondary tasks (in no particular order):

- Access training
- Approve tasks
- Book travel arrangements
- Find a retail branch location
- Submit expense reimbursement
- Find the help desk
- Look for company stocks (JPMC stocks only)
- Find an office location
- Read business site news
- Record time (timecard)
- Research policies



Pictured: Findings from contextual interviews showing the key tasks employees engage in and the tools they use for each. The company's long-term goal is to expand the number of tasks that involve the intranet (in pink).

INTRANET TEAM



Pictured: (clockwise from bottom left) Dennis Deacon, Lori Pollan, James Reilly, Alex Zawadiwsky, Jeanine Carlucci-McDonnell, Nancy Goebel, Jeffrey Easton, Gerben Hooykaas, Phil Diol, Susan Korpela, Janette Channell, Craig Stabler and Michael Welsh

Team numbers

"The extended 'intranet staff' consists of several specialty teams," says Alexandra Zawadiwsky, managing director of SSG and the intranet's champion. Together, these teams include:

- 37 technical staff (45% offshore) that manage the Enterprise Portal and eight major lines of business and corporate intranet sites.
- 13 product managers that drive the strategy and operations of the Corporate Portal (including *Company Home* and related tabs) and key intranet utilities (such as *Phonebook*, search, and site metrics).
- 3 user experience experts focused on usability, accessibility, and user interface and information architecture standards.

Intranet Oversight

The intranet itself is managed by SSG, part of the firm's Corporate Technology Group. "The Shared Services Group works in close partnership with the key stakeholders — Marketing & Communications, HR, Finance, and the revenue-generating businesses, such as the Investment Bank — who deliver their content, products, and services via the Web to the end user, our staff," notes Zawadiwsky.

Historically speaking, the group's being a part of the Corporate Technology Group has meant the technology part of the intranet equation wasn't a problem. "However, the major challenge has been in ensuring that business and end-user needs are well understood and reflected in everything we do. SSG has therefore concentrated on

building a governance model that includes all the firm's businesses and corporate groups, as well as the end users," says Easton, and playing "the role of facilitator of firm-wide consensus on issues of intranet design and functionality standards."

Honing the Team Through Mergers

Interestingly, the SSG group was formed and honed through several mergers. "The intranet groups started at roughly the same time — in the late 1990s — in the three major JPMorgan Chase predecessor firms of J.P. Morgan, Chase Manhattan Bank, and Bank One." Chase's intranet team was part of the firm's technology group, while the other groups were part of marketing and communications groups. "Firms that had aligned the intranet primarily with the corporate technology group excelled at delivering custom intranet sites and applications, but often with little regard for consistency in design and functionality. On the other hand, firms that had aligned their intranet with the marketing and communication role understood the value of consistency in design and function, but lacked the means to enforce standards beyond the employee portal," says Easton.

With each merger — beginning in 2001 with the merger of Chase Manhattan and J.P. Morgan — the intranet team refined and refocused itself as needed, gaining crucial technical and strategic skills for supporting the intranet. "For example, SSG has both a Web application development team and a user-centered design team that work closely together to ensure that standards and best practices are followed in all intranet projects," says Easton.

BACKGROUND

The current intranet is the result of three companies ultimately merging into one — and the need to smooth the resulting design implications. "After the 2004 merger between JPMorgan Chase and Bank One, the firm found itself with an intranet that had only small pockets of consistent design," says Channell. The intranet team's mandate: create a consistent user interface while lowering costs.

So, later in 2004, the intranet team introduced a consistent portal environment. Accordingly, "the intranet evolved from a diffuse and inconsistent environment, to a more centralized and consistent one," says Channell. "We evolved from simply posting HTML pages to a multitude of content management authors and technologies." Furthermore, by focusing on an enterprise-wide portal, the intranet team can constantly work to lower costs and complexity.

DESIGN PROCESS AND USABILITY ACTIVITIES

Redesign Impetus

The redesign's impetus was to migrate multiple legacy intranet sites — each with its own design and technical infrastructure — to a consistent design with shared back-end resources. "User interface design was inconsistent and confusing, there was a lot of duplication, and much of the content was either hard to find or out of date," says Carlucci-McDonnell.

While getting numerous business groups — each running its own intranet — to agree on a new, standardized approach could have been difficult, the redesign team used user-centered design principles to build consensus. "We would test a variety of proposed approaches with the agreement that we would move forward with the approach that users consistently performed best with," says Easton. During such efforts, he says the team balanced fixing usability issues with trying to move —

sometimes nudge — the design toward "our long-term vision of the end state of the intranet."

Test Techniques

To identify needed intranet changes, the team studied user behavior in several ways. "We used Omniture Sitecatalyst to measure actual usage trends, conducted contextual interviews with employees and consultants, ran usability labs on the existing design, and conducted card-sorting exercises," says Easton.

To user-test the existing intranet, the team assigned users various tasks, such as look up an employee by last name or other criteria (such as the last four digits of a phone number); find information on a line of business; find news on a particular topic; make a change to their own employee profile; and navigate to a list of commonly used sites and applications.

The overall usability techniques they employed included:

- **Card sorting.** "Nearly every project includes some card sorting because it is cheap and easy to execute and we have found that the payoff in increased navigation success rates is significant," says Craig Stabler, SSG's user experience manager. "We use both traditional paper card-sorting techniques and an online tool called WebSort. We often teach the content owners to do their own card-sorting sessions in the hopes that they will use the technique to improve their content hierarchy and naming on an ongoing basis."
- **Field studies.** The team used field studies to understand how employees use the intranet. "For this redesign, we focused on doing contextual interviews with employees in back office or support roles, as they are typically not allowed to participate in usability labs," says Stabler. "We then used this data as the basis for creating some crudely designed personas."
- **Heuristic evaluation (expert review).** "Heuristic reviews were used for some of the smaller sites and applications that were migrated to the Enterprise Portal," says Stabler. "These are generally used in low-impact situations or when we were brought into the process after the design phase of the project."
- **Surveys.** In general, surveys are a suspect usability tool, since they only gauge what users think, not what they actually do. With that in mind, "we used surveys in an innovative way — we used a survey tool to do testing of certain aspects of the information architecture of the redesign," says Stabler. "For instance, we would ask a random sample of employees to think of a link named 'X' or look at a screen shot with a tab named 'Y' and then ask them what they would expect to find behind that link or tab. We would give them multiple choices, only one of which was the intended content behind the link. If the 'expected' answer was not the clear winner, we would go back to the drawing board. The survey method also allowed us to identify any groups' differences in expectations."

- **User testing of new design prototypes.** The intranet team conducted multiple "remote usability labs" — using conference calls and virtual meetings (in particular, Lotus Sametime, which is standard throughout the company) — on iterations of the redesigned site. In the meetings, an evaluator shared his or her screen with the facilitator and observers. "This approach does not capture body language or facial expressions, but it does allow evaluators to participate right from their desk, and saves the firm in transportation costs and lost productivity," notes Stabler. He says the method also allows them to recruit a larger cross-section of users for usability studies, since participants don't need to travel to the usability lab.
- **User testing of the old intranet.** The redesign team user-tested the old site to determine what worked and what didn't, and used the results to convince others. "We used this as a way to settle any disagreements about which functional and design elements to keep from each of the predecessor sites," he says.
- **Increased accessibility.** The team identified opportunities for boosting accessibility and immediately implemented some of the easier changes. "The long-term goal is to have the Enterprise Portal compliant with Priority 1 and 2 of the World Wide Web Consortium's Web accessibility standards — and we have a plan in place to do that," says Stabler.

Employees' Reliance on Search

One interesting finding from the usability studies was the degree to which employees relied on the search engine. "We were surprised by the significant increase in the percentage of users that used the intranet search tool to navigate the intranet," says Easton. "In 2002, we found that about a third of users would primarily use the search to navigate the intranet. During the redesign, however, we saw a majority of the users using the intranet search for navigation."

From Research to Redesign

The above research in hand, the team saw a common theme: "users were spending a lot of time learning and adjusting to multiple and inconsistent user interfaces," says Easton. Users avoided some sites due to navigation issues and simply couldn't locate other sites. Furthermore, users' browsing techniques differed — some used search, others menus, and still others relied on saved links.

"We decided that we needed to come up with a single set of UI standards and to build an infrastructure and governance model around them so we could drive more consistency on the intranet," reports Easton. "We used an iterative design process to come up with prototypes that would support the different user 'personas' and aggregated information and functionality to reflect end-user expectations and processes more accurately."

To develop and then enforce a consistent — and easy to implement — design, JPMorgan Chase formed the aforementioned DRB and built the Prototype Tool, also detailed above. Beyond providing an easier-to-use interface, the standardized design also gave business groups an economic incentive for using the new portal: decreased intranet costs.

Multiple Inspirations

In terms of design inspiration, Nancy M Goebel, VP of SSG's benchmarking team, cites other intranets (including those featured in previous Nielsen Norman Group Design Annuals), as well as the firm's active participation in several peer benchmarking groups. "Sharing success stories and design best practices with other large intranet teams helps us understand where we are leaders and where we need improvement" says Goebel.

"We also followed the lead of our Internet design teams to ensure some consistency in user experience between our customer-facing and employee-facing sites and applications" says Easton. "For example, the intranet color palette was originally influenced by the color palette of the three JPMorgan Chase external sites: chase.com, jpmorgan.com, and jpmorganchase.com." That said, "the Intranet Design Review Board, which 'owns' the standard color palette for the intranet, has expanded the colors beyond what is being used on the external sites."

TIMELINE

- **2002**: What was then the Intranet Service Group began work on a shared portal infrastructure that offered portal and content management capabilities.
- **2003:** The group obtained buy-in from various businesses within the firm and selected Vignette as its CMS.
- **Early 2004:** With the team already building a new portal platform and setting standards, the Bank One and JPMorgan Chase merger announcement required a reevaluation of the plan.
- **September 2004:** One month after the August merger, the new Shared Platform was in production, becoming the default homepage for the two primary organizations.
- **December 2004:** Redesign team introduced the default homepage (*Company Home*), the *Resources* tab, and "on-boarded" two major lines of businesses to the portal.
- **2005**: Continued moving additional sites to the portal. By mid-year, the *Resources* tab was broken into two tabs: *HR & Personal* and *Workplace Resources*.
- **Late 2005:** Adding *HR & Personal* resources strained the portal and produced stability issues; as a result, the intranet team temporarily removed some personalized content from *Company Home*. Development of the Prototype Toolkit and templates began.
- **2006:** A more stabilized portal, and streamlined processes, drove higher portal adoption rates by business groups, as well as increased customer satisfaction. Currently, the platform is home for the Corporate Portal (*Company Home*, *HR & Personal,* and *Workplace Resources*), four (out of six) line-of-business sites, and four (out of nine) corporate groups.

RESULTS

Streamlining Creates Cost, Content, Usability Improvements

The redesigned JPMorgan Chase portal, and subsequent stability improvements, have driven vastly increased numbers of employees to rely on the intranet. Today,

the redesigned intranet homepage, *Company Home,* averages over 620,000 daily page views with 110,000 unique daily visitors.

The redesign also drove down the number of pages, the amount of back-end infrastructure needed to support the portal, and ultimately, the portal costs. “The cost of the intranet — including search and the *Phonebook* — is projected to decrease by about 66% from 2005 to 2007, and the number of pages on the major intranet sites was reduced from 49,737 in 2004 to 16,317 in 2006,” says Zawadiwsky. Sites that moved to the corporate portal decreased their site content an average of 67%, thanks to eliminating outdated content and simplifying their information architecture.

Today, employees can use the intranet in previously impossible ways. “For example, clients can preview what their site will look like in the early stages of development,” says Diol. “We used to use wireframes to try to convey this, with poor results. Also, sub-groups used to seek out Web servers and resources to create sub-websites. In the early stages of the portal, it was not nimble enough to help these smaller groups. The streamlining efforts and the standards template library had finally provided a way for subgroups to easily post content and set up mini-sites under the umbrella of their parent line of business.”

Users appear more passionate about the new intranet; they also seem to view many previously disconnected sub-sites as a single entity. “As a result of the migration of content and functionality to the Enterprise Portal, and the more consistent user interface that comes with that, we have seen an increase in the percentage of usability lab participants that describe the intranet as one big site, as opposed to a ‘mini Internet,’ which used to be the predominant description,” says Easton.

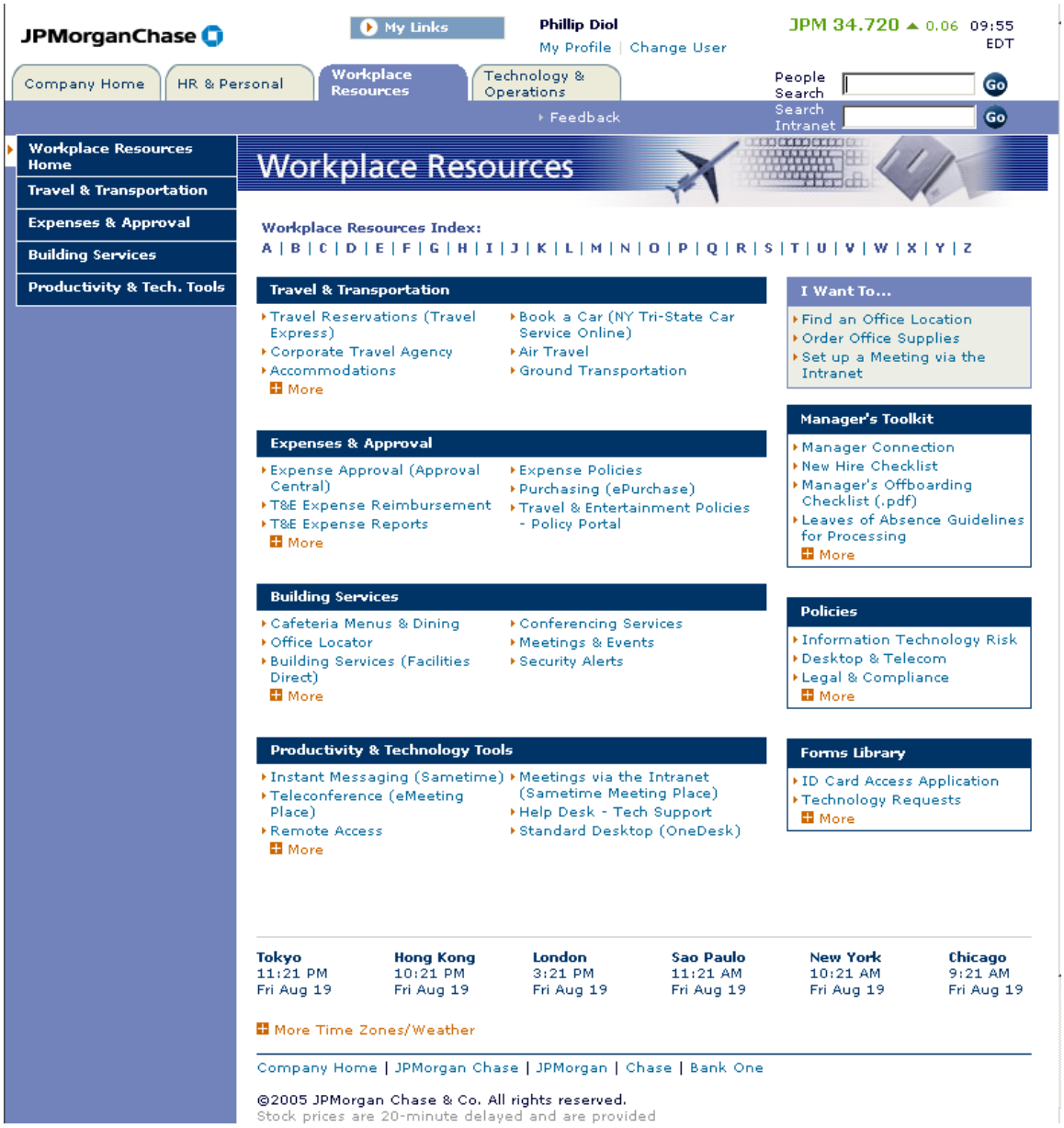
Users are also, in general, more partial to the intranet. “The percentage of evaluators that consider themselves ‘experts’ on the intranet has increased significantly,” he says.



Pictured: The redesigned homepage with “large font” activated. With the redesigned templates, all screen elements resize gracefully; no content is truncated. Most intranet content now works this way.



Pictured: An example of a redesigned news page, highlighting JPMorgan Chase's hosting of 2006's World Usability Day NYC.



Pictured: The *Workplace Resources* page, reached from a part of the persistent horizontal navigation (tabs), offers workplace-related, personalized resources, grouped by topic. An alphabetical look-up supplements search options.



Pictured: A detail from the *Web Usability* page, one of the topics under the *Workplace Resources* page.



Pictured: A line-of-business homepage for news and information — the highlighted tab denotes the user's line of business. (Users can also change regions and view related content.) The page includes a *How do I?* portlet, with answers to the most common questions.

Gauging Redesign Impressions

To gauge users' reactions to the redesigned intranet, "we conducted usability labs both before and after the redesign and found that employees were more successful at completing core tasks," notes Easton. "We also monitored the comments coming in through the feedback link on the *Company Home* page." Interestingly, he notes, conducting a site-wide survey to do this was not an option, as "surveys have not been used to collect feedback since 2003, due to a moratorium on firm-wide questionnaires."

Users' overall response to the redesign has been positive, he reports. "Users appreciated that their most-used sites and applications were easier to find. They also report being more proficient with the intranet. Before the redesign, evaluators reported feeling proficient in using the Internet significantly more than they reported proficiency with the intranet," says Easton. "After the redesign, users' perceived proficiency with the intranet increased to the point that there was no longer any difference from their perceptions about their Internet proficiency."

Thanks to the redesigned intranet, JPMorgan Chase reports six significant improvements overall:

1. **Centralized:** Reduced or avoided $14 million in costs by creating a single, shared intranet portal environment that replaced multiple environments with a variety of designs and information architectures.
2. **Simplified:** Reduced the number of standard design templates from more than 100 to less than 30. Reduced pages on sites 'on-boarded' to the shared portal by 66%.
3. **Unified:** The intranet's DRB owns the intranet's user interface standards, and vets new site and application designs for compliance, ensuring consistency.
4. **Streamlined:** A new online wizard helped reduce the design process from two weeks to two days, by helping content owners select and use standard page templates, see working previews, and generate all necessary code.
5. **Reused:** Standard components facilitate a more consistent design. For example, an *Interaction Patterns Library* provides designers and developers with standard code examples to make compliance easier. More than 90 sites also use a single, standard header and footer for sites and applications.
6. **Trained:** More than 60 employees have taken an intensive, 10-day course on user-centered design and have been "embedded" as usability advocates within their organizations.

These actions have paid off: over 90% of major line-of-business sites reportedly comply with the basic intranet design standards, and all have pledged to achieve full compliance in the future. Bottom-line costs have been significantly reduced and, most importantly, intranet users report better search results and an easier time finding the sites and applications they use the most.

LESSONS LEARNED

Insight from Janette Channell:

Standardization drives usability. "We found many benefits from standardizing the user interface, implementing standard templates, and providing a Prototype Toolkit that allows business stakeholders to quickly see exactly what their site will look like — including the font, colors, and topic sorting — prior to migrating the new site onto the enterprise portal. These changes have also decreased the amount of time needed to identify any business group's particular requirements."

Insight from Phillip Diol:

Keep "clients" involved: "Involving clients in the page design process, and allowing them to participate in decision-making — albeit to a somewhat limited extent — goes a long way. First, it reduces the perception that UI standards are being forced upon them. Second, it instills those standards in them. Finally, and perhaps somewhat imperceptibly, it moves all clients toward a consistent, company-wide portal model, increasing acceptance and pressure for all business units to achieve a similar look and feel."

Bank of America

Using the intranet:
Bank of America is one of the world's largest financial institutions, serving individual consumers, small- and middle-market businesses, and large corporations with a full range of banking, investing, asset management, and other financial and risk-management products and services. The company serves clients in 175 countries and has relationships with 99% of the US Fortune 500 companies and 80% of the Fortune Global 500. Bank of America Corporation stock (NYSE: BAC) is listed on the New York Stock Exchange.

Headquarters: Charlotte, North Carolina (US)

Number of employees the intranet supports:
200,000 worldwide

Banking facility locations: Bank of America operates in 31 (US) states and the District of Columbia. It also has associates that access the intranet and work from states without a banking center. Outside the US, associates work in an additional 27 countries.

Sales: Bank of America doesn't release sales figures, but has US$1,534 billion in assets.

Design team:
In-house, by Bank of America's Interaction Engineering Center of Excellence.

Members:
Mandy Linton, VP Shared Application Services, Interaction Engineering COE; Jennifer Cooper, AVP Shared Application Services, Interaction Engineering COE; Travis Anderson, VP Shared Application Services, Interaction Engineering COE

SUMMARY

Bank of America's intranet team truly understands the savings attainable when great intranet personalization is deployed. The Flagscape intranet offers users a powerful feature set that's specifically tailored to their individual needs.

Always considering the user's experience first, the design team didn't want employees to hunt for the URL to their information doorway. Instead, everyone's browser homepage is set to the intranet homepage. Once there, users can link into the Flagscape intranet's three primary enterprise sites—Flagscape Americas, Flagscape Europe, and Flagscape Asia—as well as to any of its 150 division subsites.

Flagscape supports more than 200,000 unique users who generate a whopping 90-million plus page views a month, and their needs are bound to be different. A mortgage broker and a bank teller sometimes need the same information, but often have completely varied requirements. Prior to Flagscape's rollout, Bank of America's intranet consisted of more than 1.5 million disparate pages of information, scattered across approximately 1,000 individual sites and 4,000 Lotus Notes databases. Having completely inconsistent designs across a large organization might work on a micro level, but at some point the model will cause disruption for the users. For example, if all CD managers frequently access similar information and a specific application, a special site dedicated to them might suffice. But once they need a piece of information located on a different site (which they surely will), the CD managers will have to:

1. Find the site
2. Deal with a user interface that doesn't match what they know
3. Trust the information on a site that might be unfamiliar

This is a huge leap of faith, and not necessarily a sagacious one. The more sites that live within a corporation's intranets, the more likely it is that information is inconsistent and outdated. Even the most rigorous intranet managers know that it's simply more difficult to maintain many sites, and thus information goes stale. According Bank of America designers, this work "consumed significant resources and presented issues with content management, branding, usability, and technology."

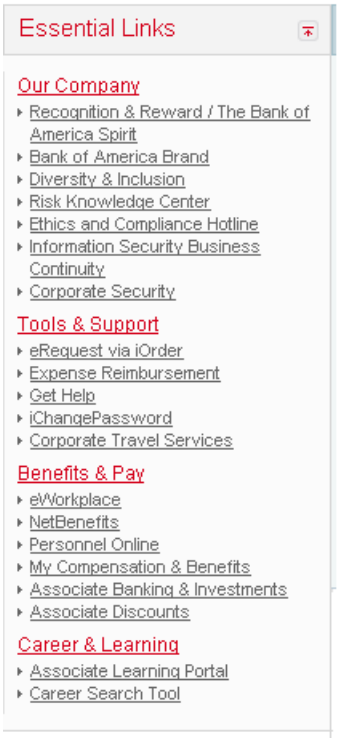
This is where the redesign and serious personalization efforts came in.

The homepage is the foundation of this work. The page obviously targets the logged-in user, greeting that person ("*hello Mary Elizabeth!"*) in the page's upper left, just below the logo and global navigation.

Because tools and audiences vary across the enterprise—human resources (HR) tools vary by country, for example—the ability to target this homepage section is deemed most critical. Based on the login, the intranet recognizes not only users' names, but also their location and level. Armed with this information, the intranet can best direct people to the links they need. For example, in the *Essential Links* area in the homepage's left-side navigation, users see 20 of the organization's most-accessed applications or information areas, including: *Recognition & Reward/The Bank of America Spirit, Bank of America Brand, Ethics and Compliance Hotline, Expense Reimbursement, Corporate Travel Services, NetBenefits,* and *Career Search.*

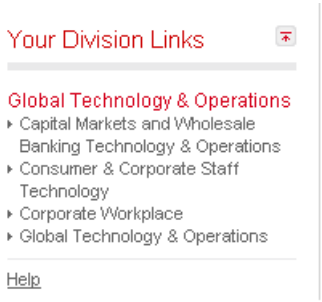
As this list of links shows, the topics people commonly need information about are quite varied. Putting somewhat unrelated menu commands together in one list can sometimes confuse users, but because this list is based on research and the designers know people need to regularly access these items, it was good to consolidate them on the homepage.

Bank of America users know that if they're trying to accomplish a common task, they should first consult this list of *Essential Links.* Designers help users traverse the list by limiting it to 20 items. The category headings—*Our Company, Tools & Support, Benefits & Pay,* and *Career & Learning*—also help keep the list manageable. The headings mirror the site's global navigation.



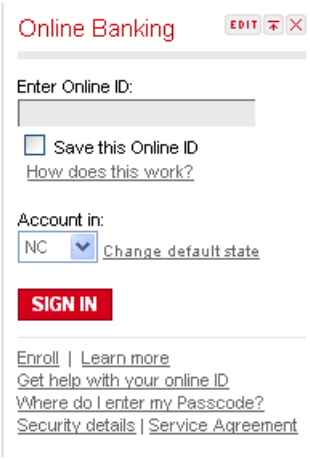
Pictured: The Essential Links list on the Bank of America intranet homepage takes users to their most common tasks.

Scrolling down a bit further on the Flagscape homepage, users find a list of *Your Division Links,* where they can access some of their division's sites that are more important. Users are one click away from their primary line-of-business sites, which contain the business-critical information and tools they need to do their jobs. This structure also helps keep people in the same wider areas connected and informed.



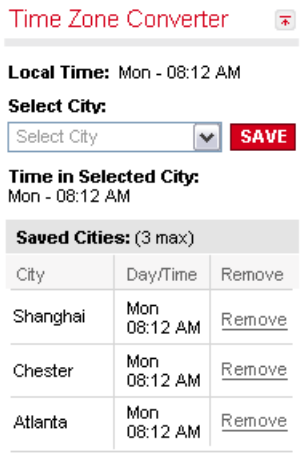
Pictured: The Your Division Links portlet on the Bank of America intranet homepage takes users to their division's most important areas.

Special employee benefits entice users to maintain accounts at Bank of America. So why not make it as easy as possible for them to access these accounts? The homepage does just that with the *Online Banking* area in the bottom right. Here, users with an account can log in or get needed help; those without an account can *Lean more* or *Enroll.*

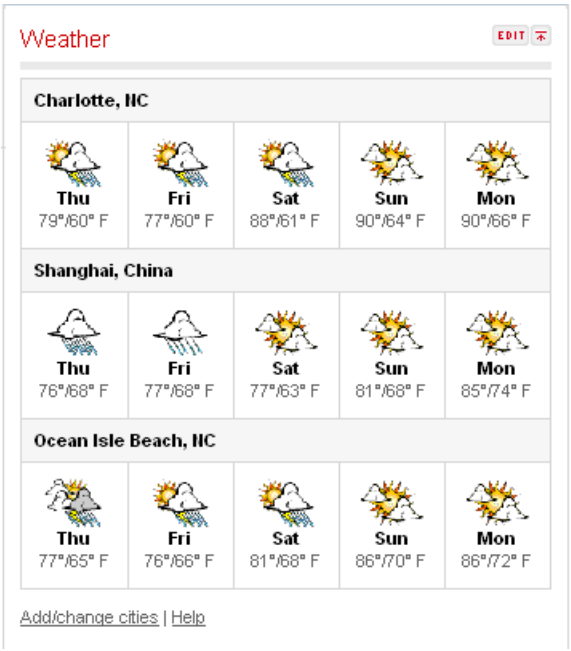


Pictured: The *Online Banking* portlet on the Bank of America intranet homepage lets users with bank accounts at the company log in and do their banking. Those without an account can enroll or get further information.

Other helpful homepage elements include weather information, a time converter, a list of bank holidays, a list of stock market quotes, and *Favorites*, to name just a few. Staying true to form and sticking with the vast personalization capabilities, users can personalize or customize each element. Users can add and remove cities they work with frequently in both the time zone and weather portlets. This lets them easily see the current local time and weather for people they're working with or offices they're traveling to.



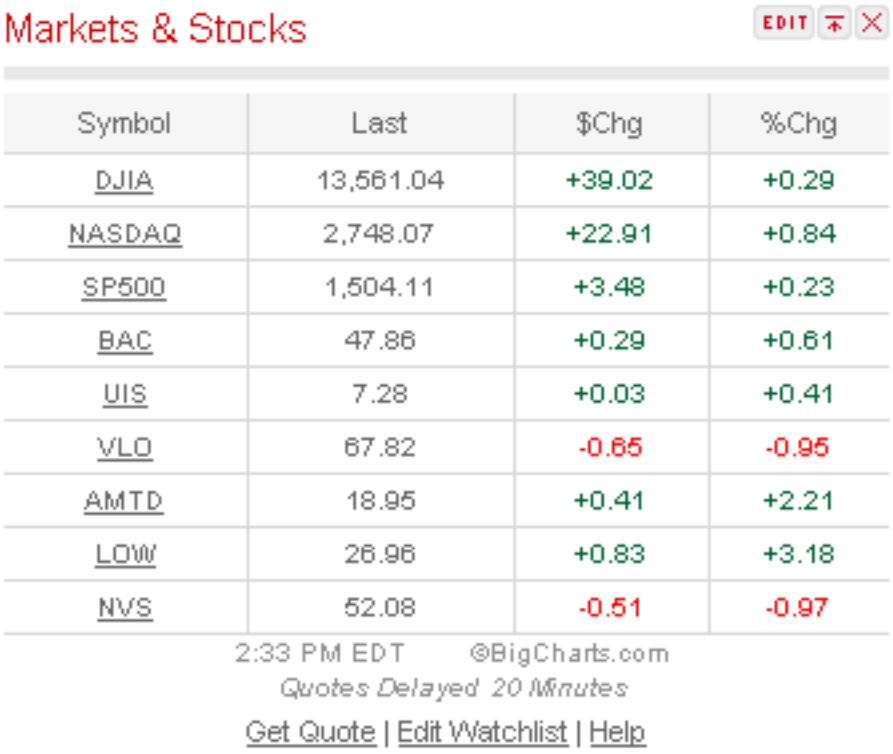
Pictured: The homepage's *Time Zone Converter* portlet lets users see the current time in cities they do business with or travel to.



Pictured: The homepage's *Weather* portlet lets users see the current weather in cities they do business with or travel to.

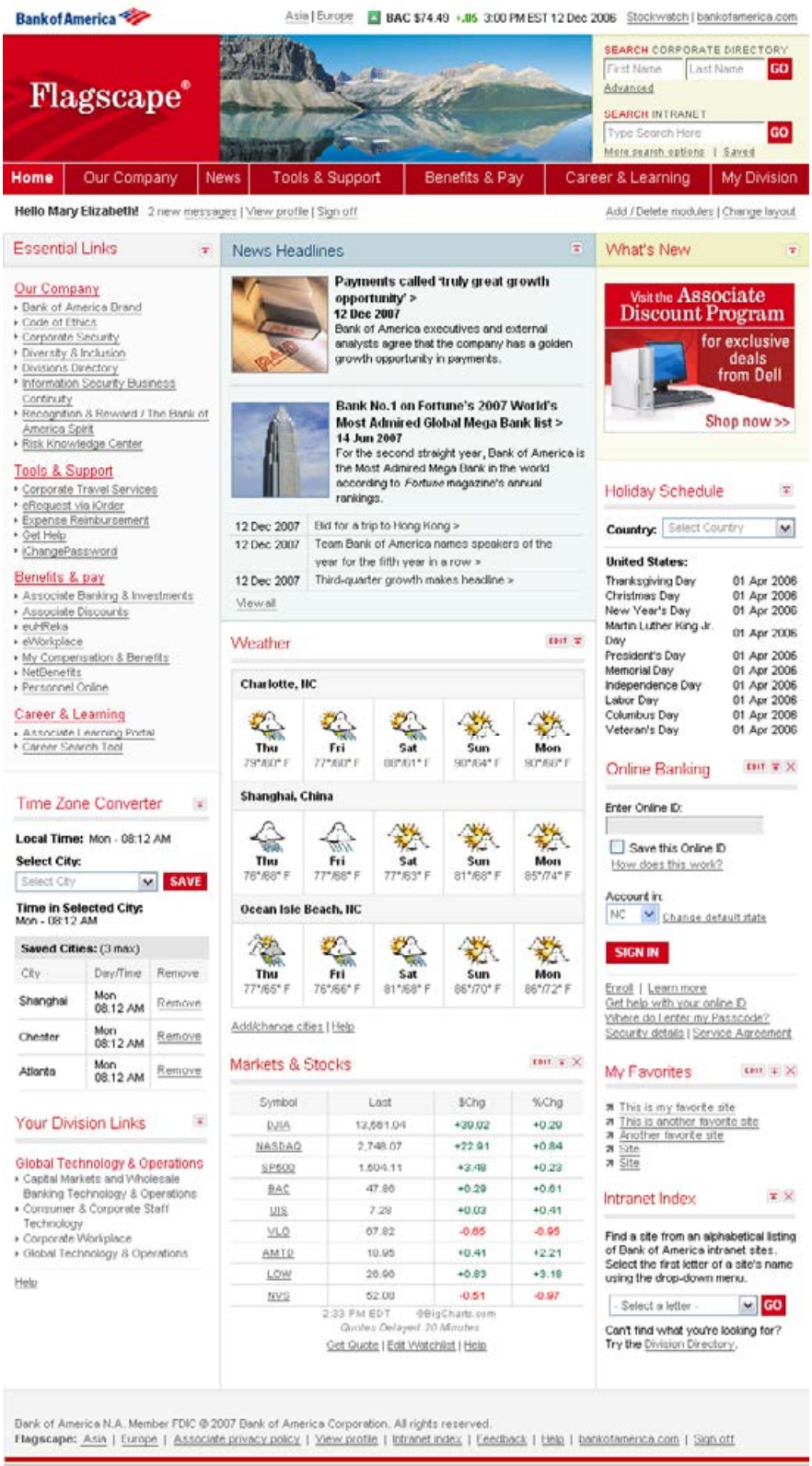


Pictured: The homepage's Holiday Schedule portlet helps users better plan and schedule meetings by enabling them to see not only their own holidays, but also those in the cities where they do work.



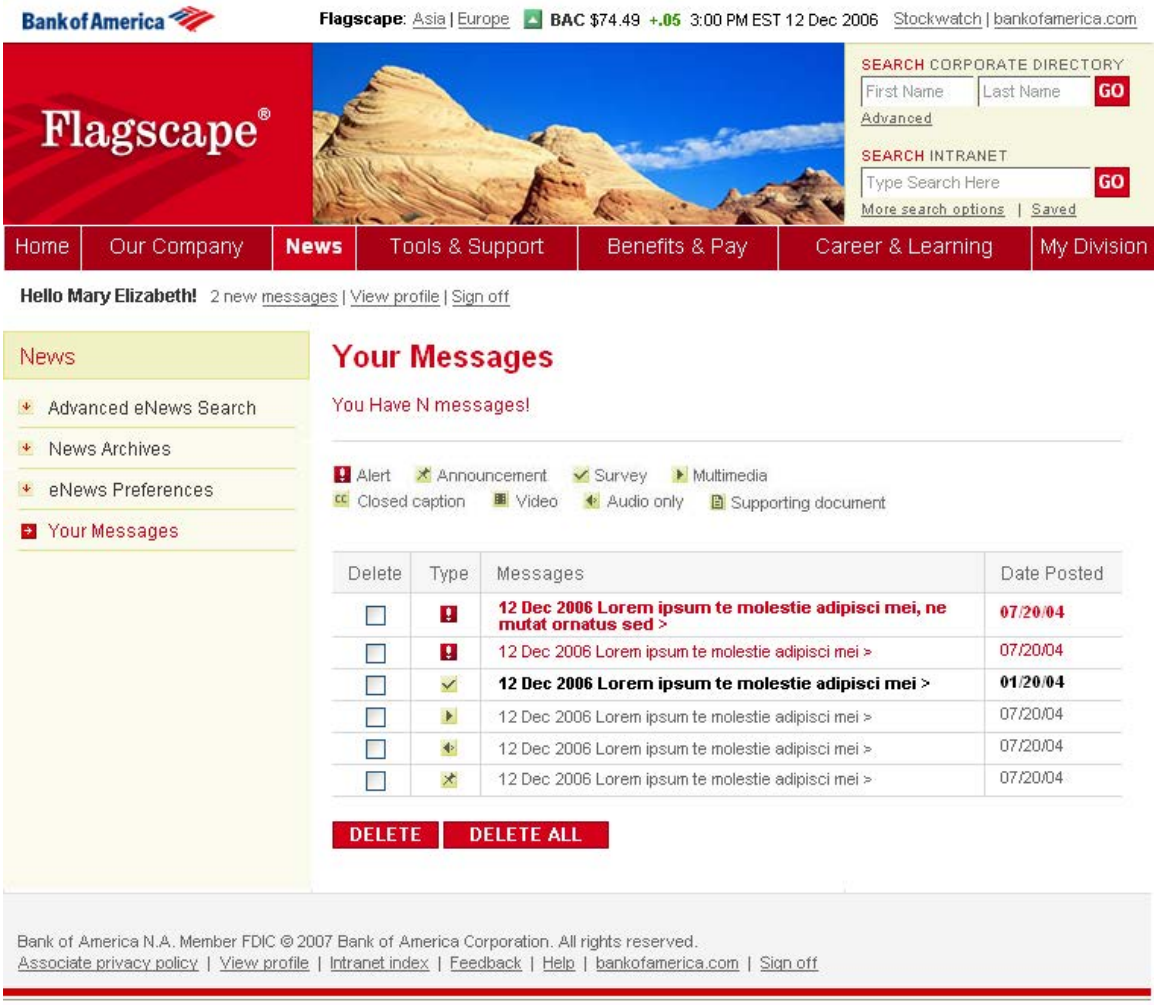
Pictured: The *Markets & Stocks* portlet lets users track stocks, add and remove stocks, and move them up or down in their list.

At the top of the homepage, just to the right of the user name, users are immediately informed when they have new messages, ranging from simple alerts to surveys requesting user feedback. These same messages appear in the upper right side of the homepage in the *Your Messages* portlet. In this case, the user is again informed that she has two messages; the alert is in subtle yet visible red text (which matches the site's color scheme, so it's not too distracting).Users don't need to click to read the crux of a message; by default, four headlines fit in the portlet. Users can click through to specific messages or click the *View All* to see the list of all current messages.



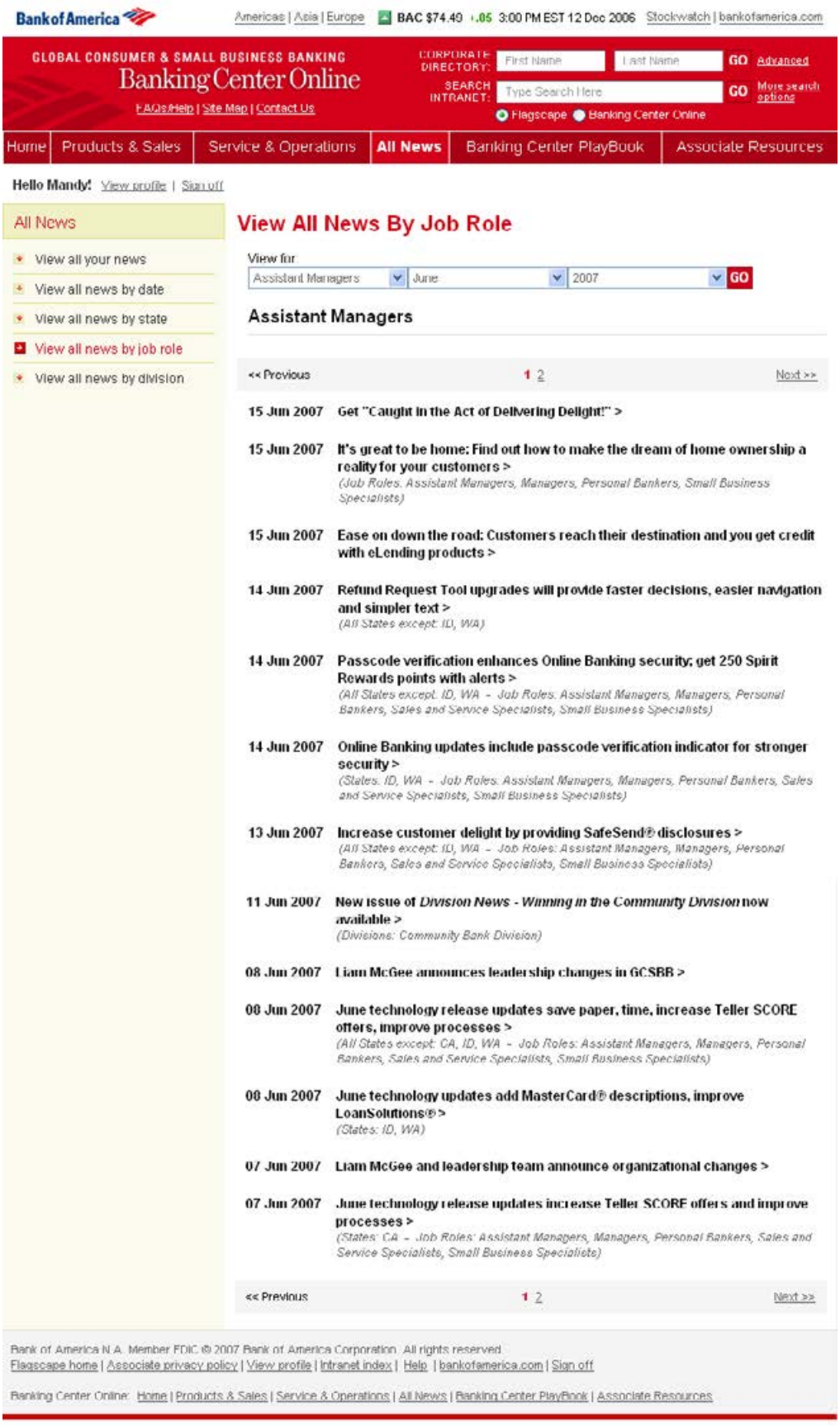
Pictured: The Bank of America intranet homepage offers a plethora of personalization features that help users find information and get work done quickly.

When users click through to read their messages, they arrive at the *Your Messages* area. A legend at the top of the page informs users of what the page's different icons mean, differentiating alerts from announcements, surveys, and multimedia elements. The icons include those for closed caption, video, audio, and supporting documents.



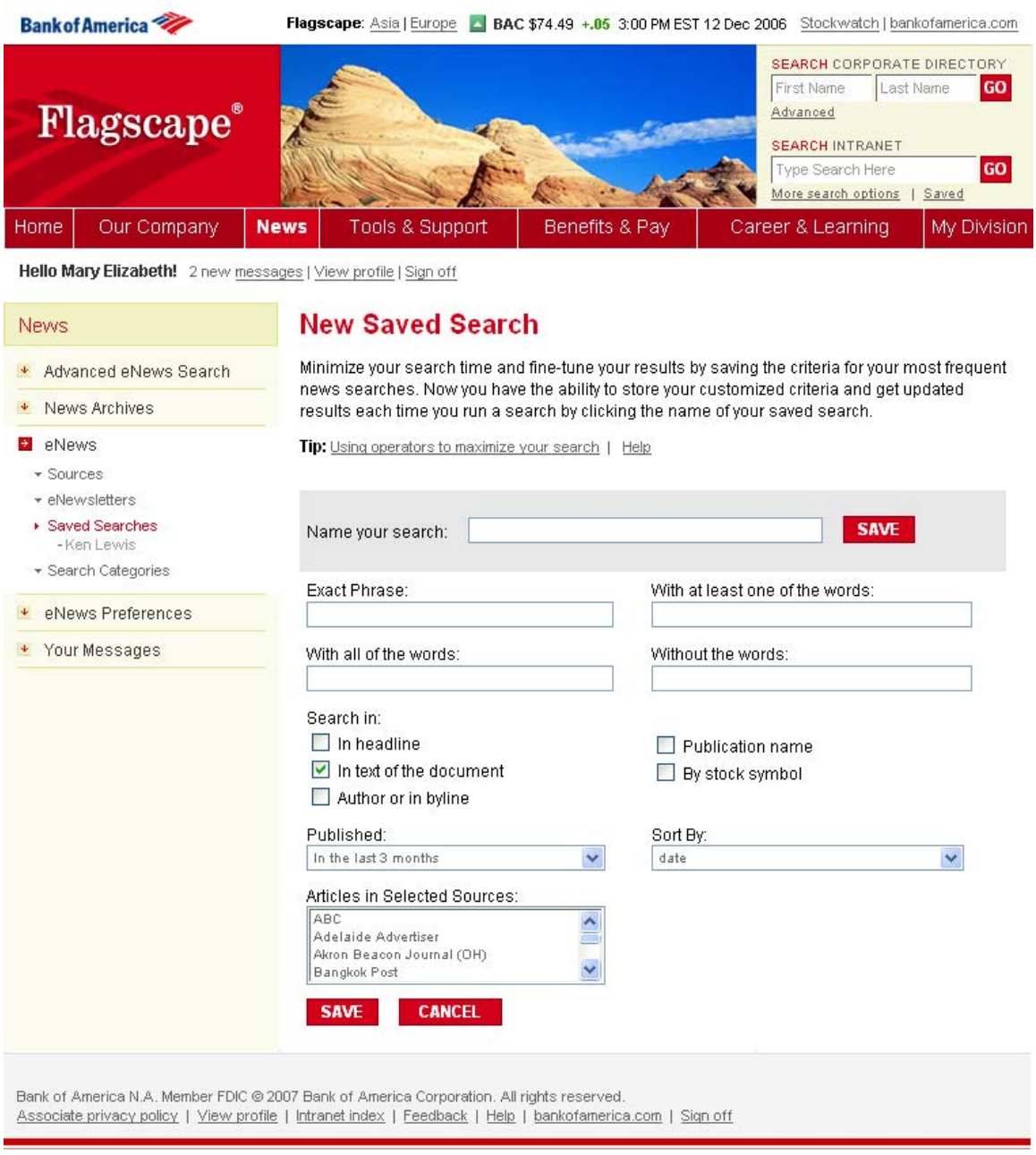
Pictured: Users can read and act on various messages and alerts in the *Your Messages* area.

In Flagscape's *Banking Center* subsite, users can click *View All* to see all the targeting attributes available for news published on the site. Users can view all news published to the site or news targeted specifically to them, and sort the news by date, state, job role, and division.


Bank of America
Americas | Asia | Europe
BAC $74.40 ↑.05 3:00 PM EST 12 Dec 2006
Stockwatch | bankofamerica.com
GLOBAL CONSUMER & SMALL BUSINESS BANKING
Banking Center Online
FAQs/Help | Site Map | Contact Us
CORPORATE DIRECTORY:
First Name
Last Name
GO
Advanced
SEARCH INTRANET:
Type Search Here
GO
More search options
Flagscape
Banking Center Online
Home
Products & Sales
Service & Operations
All News
Banking Center PlayBook
Associate Resources
Hello Mandy! View profile | Sign off
All News
View all your news
View all news by date
View all news by state
View all news by job role
View all news by division
View All News By Job Role
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Assistant Managers
June
2007
GO
Assistant Managers
<< Previous
1 2
Next >>
15 Jun 2007 Get "Caught in the Act of Delivering Delight!" >
15 Jun 2007 It's great to be home: Find out how to make the dream of home ownership a reality for your customers >
(Job Roles: Assistant Managers, Managers, Personal Bankers, Small Business Specialists)
15 Jun 2007 Ease on down the road: Customers reach their destination and you get credit with eLending products >
14 Jun 2007 Refund Request Tool upgrades will provide faster decisions, easier navigation and simpler text >
(All States except: ID, WA)
14 Jun 2007 Passcode verification enhances Online Banking security; get 250 Spirit Rewards points with alerts >
(All States except: ID, WA - Job Roles: Assistant Managers, Managers, Personal Bankers, Sales and Service Specialists, Small Business Specialists)
14 Jun 2007 Online Banking updates include passcode verification indicator for stronger security >
(States: ID, WA - Job Roles: Assistant Managers, Managers, Personal Bankers, Sales and Service Specialists, Small Business Specialists)
13 Jun 2007 Increase customer delight by providing SafeSend® disclosures >
(All States except: ID, WA - Job Roles: Assistant Managers, Managers, Personal Bankers, Sales and Service Specialists, Small Business Specialists)
11 Jun 2007 New issue of Division News - Winning in the Community Division now available >
(Divisions: Community Bank Division)
08 Jun 2007 Liam McGee announces leadership changes in GCSBB >
08 Jun 2007 June technology release updates save paper, time, increase Teller SCORE offers, improve processes >
(All States except: CA, ID, WA - Job Roles: Assistant Managers, Managers, Personal Bankers, Sales and Service Specialists, Small Business Specialists)
08 Jun 2007 June technology updates add MasterCard® descriptions, improve LoanSolutions® >
(States: ID, WA)
07 Jun 2007 Liam McGee and leadership team announce organizational changes >
07 Jun 2007 June technology release updates increase Teller SCORE offers and improve processes >
(States: CA - Job Roles: Assistant Managers, Managers, Personal Bankers, Sales and Service Specialists, Small Business Specialists)
<< Previous
1 2
Next >>
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Flagscape home | Associate privacy policy | View profile | Intranet index | Help | bankofamerica.com | Sign off
Banking Center Online: Home | Products & Sales | Service & Operations | All News | Banking Center PlayBook | Associate Resources

Pictured: A line-of-business homepage where users can view their targeted news by date, state, job role, and division.

Another interesting personalization feature on Flagscape is the ability to save search criteria. This lets users set up customized news searches from selected sources ranging from the Internet to Factiva/Dow Jones. Users can name the search and choose other elements—such as specific words in the article, when it was published, and whether to search in the title, body, or elsewhere.



Pictured: The *Saved Search* functionality lets users set up customized news searches from selected sources such as the Internet and Factiva.

Even site administrators' information is personalized using roles that define their capabilities. The Bank of America intranet has three defined roles for intranet site administrators: content contributor, content contributor plus publishing, and content supervisor.

The redesigned intranet saved more than 10,000 hours for Bank of America Associates in its first year of adoption (October 17, 2003 to October 17, 2004). Flagscape has also become the primary source for information and tools that drive these productivity and revenue gains. The marvelous personalization features facilitate the intranet's simplicity. And the site has become a reliable corporate foundation that employees consult when performing their jobs, learning integral information about their company, and striking a more efficient balance between their work and personal lives.

URL AND ACCESS

Bank of America's intranet, Flagscape, is the employee's start-up page. The site cannot be reached from outside the corporate LAN.

The homepage URL is: http://flagscape.bankofamerica.com/portal/site/flagscape.

TECHNOLOGY

Flagscape is built on Vignette Application Portal 7.2.2 (VAP) with Vignette Content Management 7.3.1.1 (VCM) and Dynamic Portal Modules (DPM) to communicate between VAP and VCM. "We use VBIS for automated content migrations," says Mandy Linton, Bank of America VP Shared Application Services. "Sun servers running BEA WebLogic application server and Oracle databases serve the data."

The design team uses Adobe products to design and build the site, and Visio for wireframes. The team also uses Test Director/Quality Center as the QA software.

CONTENT MANAGEMENT

CMS Technology

The organization uses Vignette as its CMS. Version control is managed through Discovery, Bank of America's enterprise document repository. Discovery has built-in version control capabilities.

The CMS is aligned with roles-based permissions within the bank. "Roles are labels we have assigned in Vignette that define the capabilities of our administrators," says Linton. "We have three defined roles for our line-of-business intranet site administrators: content contributor, content contributor plus publishing, and content supervisor." Employees in each of those roles access various publishing capabilitities within the CMS and permissions for content management and administration are broken down according to the roles.

Managing the Data

The enterprise sites (Americas, Europe, and Asia) are handled by Associate Channels team members (business owners who sit in Corporate Communications).

"From the enterprise sites, the user can access sites specific to their line of business," says Greg Jung, SVP Business Support Manager. "The main line-of-business sites include: Global Wealth and Investment Management, Global Consumer and Small Business Banking, Global Commercial Investment Banking, Global

Technology and Operations. From there, we break down to the next level of sites, such as our Card Services site that is accessed from the Global Consumer and Small Business Banking site."

The 150-plus Flagscape division subsites are managed by more than 500 site administrators, who typically sit in that particular line of business (for a line-of-business-specific site) or who are affiliated with the specialty or group (for a specialty site).

The distributed content administration model lets the bank's numerous content contributors and site administrators leverage a common toolset. This results in a consistent look and feel across all Flagscape sites and subsites.

To manage the subsites' vast content needs, the administrators utilize 18 different content templates and are guided by standardized page and layout design standards. "Our standards reside on the Administrator Support site and were rolled out in December of 2006," says Linton.

These standards determine seven main categories of site development:

- Content management usage
- User interface
- Branding
- Use of custom code
- Content
- ADA guidelines
- Internationalization

Compliance

Ensuring compliance with CMS guidelines can be challenging with so many sites to manage. "It has been difficult to enforce and maintain the standards over the 150-plus division subsites," says Linton.

In addition to the difficulties of policing individual sites and their adherence to the style guide, it's also difficult to manage the migration of subsites into the enterprise network. At one time, there were more than 1,000 intranet sites within the Bank of America family. Over the last several years, the intranet team has "rationalized" these sites into the Flagscape platform, but it hasn't always been easy.

"Most sites will naturally fit within the templates," says Linton, "but when you get large sites with a great deal of custom work, it gets hard to fit them into the mold. We originally started out with 12 templates when Flagscape launched, and we only had four division sites migrated."

The complexity of migrating differing subsites into the global platform raises several issues for the team in terms of design, usability, and—most of all—technology

"Situations like our transition efforts for sites like the MBNA intranet and its migration presented a challenge simply because MBNA was using a different technology solution as well as design from Bank of America," says Jung.

INTRANET TEAM

Team Members

The team managing Bank of America's intranet is comprised of associates from two main groups within the organization: Associate Channels (business owners who sit in Corporate Communications) and Shared Application Services (technology owners).

Three members of the Shared Application Services team are currently responsible for the Flagscape user experience. The initial team that developed Flagscape included Linton, who was hired to redesign the Associate Portal (the precursor to Flagscape), two information architects, a usability engineer, a manager who did some IA work, and a contract developer.

Linton has been working on the platform for nearly five years. "When I started at the bank in 2003, the Bank of America intranet was called 'Associate Portal,'" she says. "I was hired as the visual designer to redesign the entire site to more closely align with the brand platform. As a team, our goals for the first redesign (of the Associate Portal) were to do some usability work to identify how we were going to completely re-architect the entire site and also completely redesign the look and feel of the entire site."

The team's work resulted in release 5.0, which was in place just a few months before brand executives at the bank decided that the intranet needed to have its own brand identity. To achieve the branding goals, the team was charged with the site's visual rebranding and its migration from table-based HTML to a CSS layout. The result was essentially the design that is in place today on Flagscape 6.0.

Intranet Oversight and Staffing

As with nearly all intranets, the management of the Bank of America site has changed hands as the intranet has evolved. The Associate Channels team, which resides in the Corporate Communications Group, currently owns Flagscape. Associate Channels is responsible for managing all communication going out to bank associates via the intranet, email, and Bank of America's video broadcasting channel, Knowledge Channel. According to Jung, the site has benefited from this positioning.

"We are responsible for the primary channels of communications to our associate population," says Jung. "We are closely tied with our brand and marketing function through our reporting structure up through Global Marketing and Corporate Communications. Due to this positioning, we have been able to expand the traction of Flagscape to capture all associates."

Prior to being managed by the Associate Channels group, the site was owned by Global Human Resources (then Global Technology & Operations).

Site Evolution

A period of fast-paced mergers and acquisitions in the banking industry during the 1990s drove the company's first attempt at an intranet. The bank needed to share enterprise information—specifically, information related to bank culture, business objectives, and news—with new associates. Bank of America's first enterprise-wide intranet, Oasis, was launched in 1996 to fill that need.

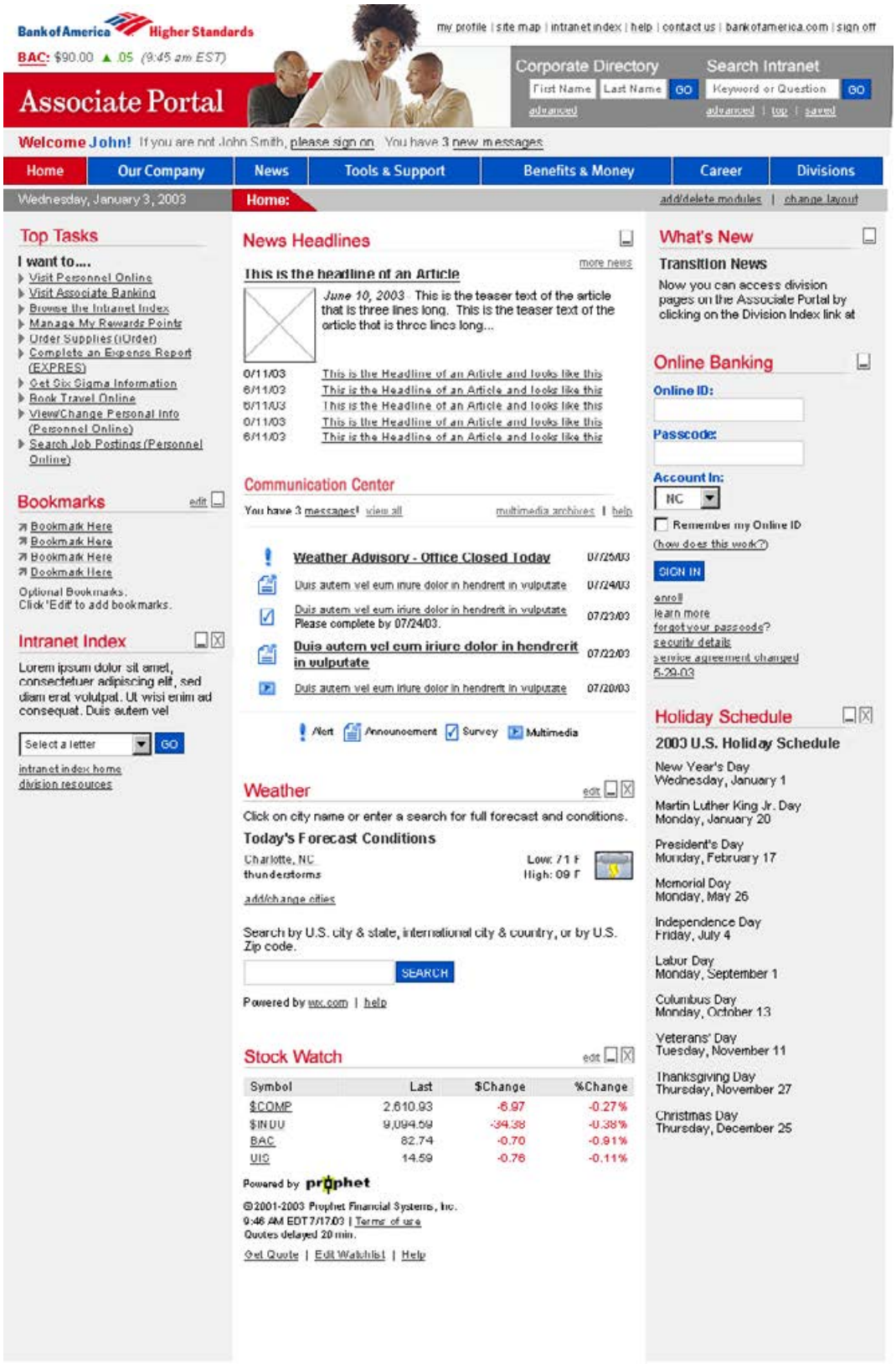
"This was a very small connector page that collected, in one place, links to news and the few other intranet sites," says Tracy Bell, SVP Change Management Executive. Corporate Communications owned and managed the site, which was launched to only

a small group of users, most of whom were in technology and among the first to have Internet access.

"The few other sites at the time were small and mostly tech-focused," she says. "They were the type of site developers created in their spare time and hosted on a server under desks with no branding or standards."

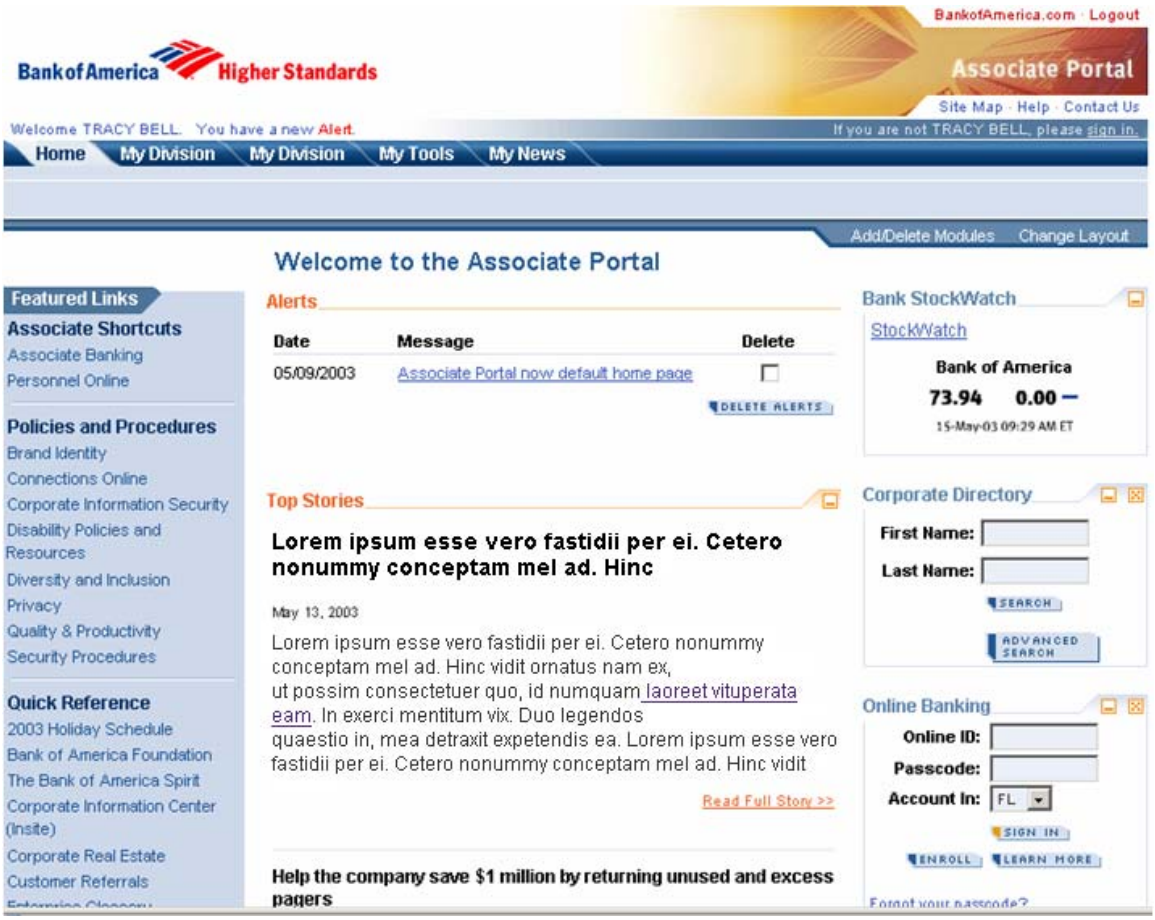
Over time, as more users gained Internet access, the Oasis content and readership grew. With this growth came demands for more information and better tools. To address this, the bank adopted a tool called Insite when it merged with NationsBank.

In 2002, after 18 months of development, a pilot site went live to just one line of business within the bank. "This was the first step in a many phased, multi-generation plan," she says. "We started with a framework and a single line-of-business site. Voice of the Customer (VOC) research and best practices were woven into every subsequent phase. It was a very massive series of improvements and adjustments, each step building on a larger vision. We now have a very robust enterprise portal, with over 150 line-of-business sites, which includes representation around the globe."


Bank of America Higher Standards
BAC: $90.00 ▲ .05 (9:45 am EST)
my profile | site map | intranet index | help | contact us | bankofamerica.com | sign off
Associate Portal
Corporate Directory
First Name Last Name GO
advanced
Search Intranet
Keyword or Question GO
advanced | top | saved
Welcome John! If you are not John Smith, please sign on. You have 3 new messages
Home
Our Company
News
Tools & Support
Benefits & Money
Career
Divisions
Wednesday, January 3, 2003
Home:
add/delete modules | change layout
Top Tasks
I want to....
Visit Personnel Online
Visit Associate Banking
Browse the Intranet Index
Manage My Rewards Points
Order Supplies (iOrder)
Complete an Expense Report (EXPRES)
Get Six Sigma Information
Book Travel Online
View/Change Personal Info (Personnel Online)
Search Job Postings (Personnel Online)
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multimedia archives | help
Weather Advisory - Office Closed Today 07/25/03
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Duis autem vel eum iriure dolor in hendrerit in vulputate 07/20/03
Alert Announcement Survey Multimedia
Weather
edit
Click on city name or enter a search for full forecast and conditions.
Today's Forecast Conditions
Charlotte, NC
thunderstorms
Low: 71 F
High: 09 F
add/change cities
Search by U.S. city & state, international city & country, or by U.S. Zip code.
SEARCH
Powered by wx.com | help
Stock Watch
edit
Symbol Last $Change %Change
$COMP 2,610.93 -6.97 -0.27%
$INDU 9,094.59 -34.38 -0.38%
BAC 82.74 -0.70 -0.91%
UIC 14.59 -0.76 -0.11%
Powered by prophet
©2001-2003 Prophet Financial Systems, Inc.
9:46 AM EDT 7/17/03 | Terms of use
Quotes delayed 20 min.
Get Quote | Edit Watchlist | Help
What's New
Transition News
Now you can access division pages on the Associate Portal by clicking on the Division Index link at
Online Banking
Online ID:
Passcode:
Account In:
NC
Remember my Online ID
(how does this work?)
SIGN IN
enroll
learn more
forgot your passcode?
security details
service agreement changed 5-29-03
Holiday Schedule
2003 U.S. Holiday Schedule
New Year's Day
Wednesday, January 1
Martin Luther King Jr. Day
Monday, January 20
President's Day
Monday, February 17
Memorial Day
Monday, May 26
Independence Day
Friday, July 4
Labor Day
Monday, September 1
Columbus Day
Monday, October 13
Veterans' Day
Tuesday, November 11
Thanksgiving Day
Thursday, November 27
Christmas Day
Thursday, December 25
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privacy policy | intranet index | my profile | site map | help | contact us | bankofamerica.com

Pictured: The 2003 Associate Portal redesign (homepage release 5.0). The redesigned site saved Bank of America associates more than 10,000 hours in its first year of adoption.

BANK OF AMERICA INTRANET TIMELINE			
	2002	**2003**	**2004**
	v.4.0: Associate Portal	**v.5.0: Associate Portal**	**v.6.0: Flagscape**
Release Notes	The site in place before the User Experience team was formed.	This redesign included two card sort studies, server log research, a design survey, and VOC/VOA feedback. The redesign also included a baseline user study (referenced below), which consisted of several time-on-task measurements.	This release included a visual design survey and a visual rebrand of Release 5.0 to the new Flagscape brand platform. The team made only a few minor interaction updates with this redesign.
Redesign Goals		▪ Design a completely different site architecture based on user feedback and usability testing ▪ Rebrand the site to be brand compliant	▪ Redesign the navigation layout to accommodate more pages and a deeper site ▪ Completely rebrand the site, changing it from the "Associate Portal" to "Flagscape"



Pictured: Bank of America's intranet homepage, the Associate Portal (version 4.0), as it looked in 2002 prior to any usability improvements.

GOALS AND CONSTRAINTS

The Bank of America intranet team has a clear goal for the site: to enhance the relationship between Bank of America and its associates. The team's efforts are aimed at increasing efficiency and productivity by simplifying access to the information, processes, and tools that associates use on a daily basis. The team executes on this vision by providing user-targeted news, information, and tools within the wrapper of a consistent user experience for all associates throughout the company.

According to Jung, the primary ongoing challenge is prioritization. "Prioritizing our product roadmap is the biggest challenge we face internally," he says. "The demand for new capabilities and enhancements to the platform outpace our ability to deliver. We also clearly understand the value of managing the amount of change given the impact it has on our end users. Our associates' ability to efficiently and effectively serve our customers are always top of mind in our prioritization processes."

Prioritization efforts contribute to the creation of the product road map, which consists of two components. The first component is tactical execution, which focuses on projects slated to be delivered within the next six to 12 months. The second component focuses on a longer-term three-year strategy that is shared with the executive leadership team.

Jung says that when the team works on prioritizing site initiatives, they try to answer two questions: "What are the business strategies that can be facilitated through the intranet channel?" And, "What do we (Corporate Communications) need to more effectively communicate to our associates?"

USERS

Bank associates who serve in a wide variety of roles—from CEO to bank teller—and use the intranet on a daily basis. Every associate (and contractor) has access to Flagscape.

"This means that we have customer facing associates as well as back-room operations associates that are leveraging Flagscape for their day-to-day working needs and information," says Jung.

USER TASKS

Users should be able to do the following tasks efficiently on Flagscape:

- Use enterprise tools
- Access news and information
- Search the corporate directory

FEATURES

Basic features of Flagscape include:

User productivity functions
- Integration with corporate directory
- Direct access to online banking
- Search functionality featuring line-of-business-specific search capabilities

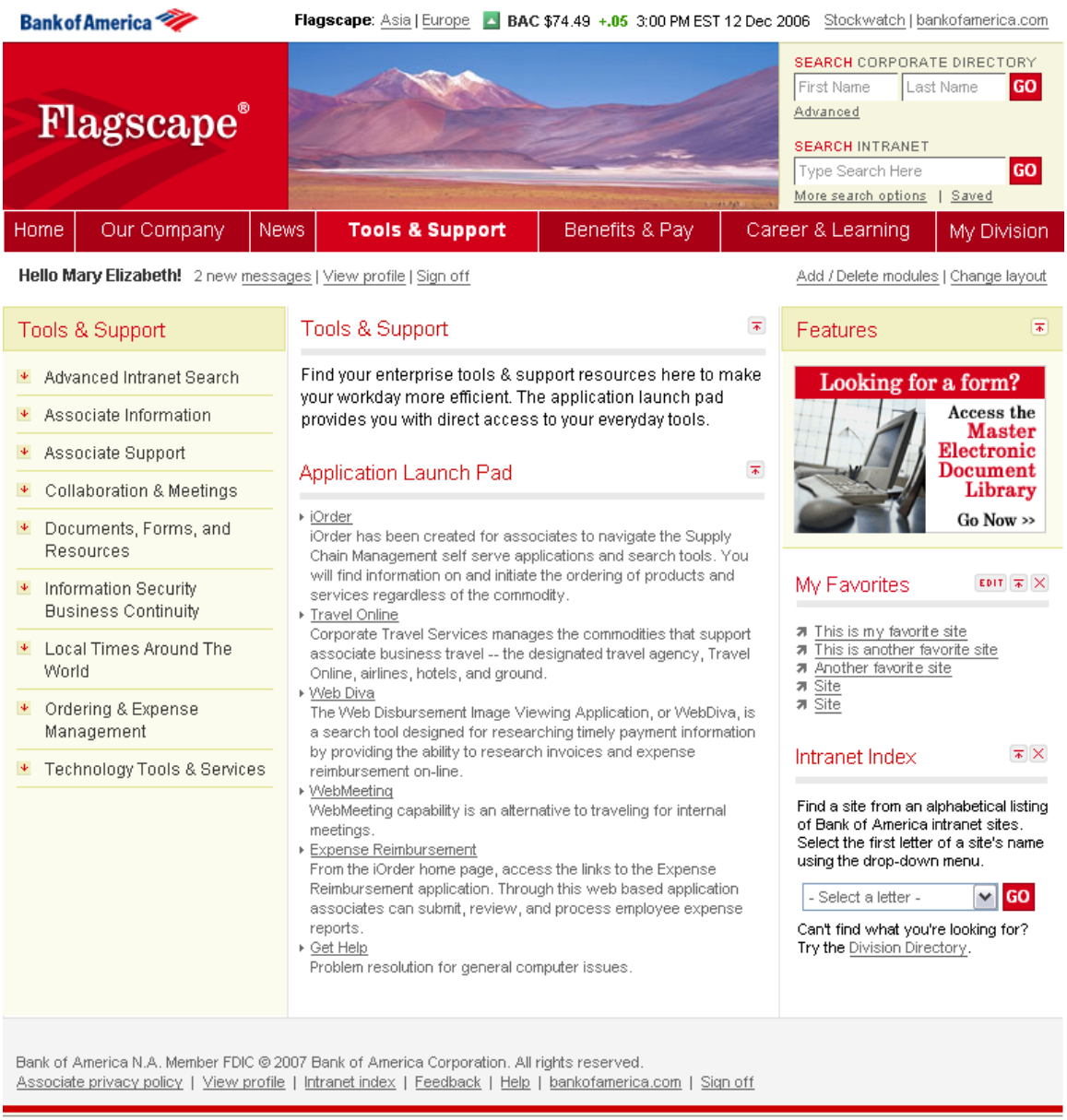
User-driven customization
- *My Favorites* portlet region
- Five-day weather forecast
- External news and search capabilities from Factiva/Dow Jones

Targeted content

Targeting is based on the associate's demographic information. Targeted modules include: primary navigation, news content, banners, alerts and announcements (such as *Your Messages*), a time-zone converter, and holiday schedule.

Industry news and information
- Market data
- Stock quotes
- Interest-rate feed
- RSS news portlet region
- Regional and enterprise news

Information capture
- Integrated polling and survey functionality



Pictured: The *Tools & Support* main top-level page on the current Flagscape site includes an application launch pad for easy access to key applications that associates need to do their jobs. It also includes the *My Favorites* and *Intranet index* portlets for quick access within this section.

Tools for Collaboration

Web 2.0-type collaboration tools, such as blogs and wikis, offer significant opportunities for more effectively managing knowledge, but they also pose unique risks for an organization such as Bank of America. The company therefore approaches this type of innovation with caution to avoid introducing unwanted risk. "One of the main requirements (for collaboration tools) will be around moderation of content and approval," says Jung. "Due to the potential risk this can pose for the corporation, we are being very diligent in our requirements definition to ensure that

we capitalize on the value these new capabilities bring, while also mitigating potential risks inherent with these types of collaboration tools."

As the bank works to define its strategy and expand opportunities for enterprise-wide collaboration support, associates across the bank have embraced SharePoint to fill the void. Within the last year alone, associates created more than 7,000 SharePoint team sites.

Jung explains the popularity of these sites: "The growth of SharePoint has been explosive within Bank of America. These team sites grew out of a need to easily collaborate within work teams (typically 200 associates or under) where a presence on Flagscape was not the best avenue." Jung says associates use SharePoint sites to collaborate on documents across a project's lifespan, as well as to track project milestones and provide access to customized lists and status reports.

"SharePoint is not where the final project artifacts are stored—we have another system for that—but they are meant for team collaboration on projects while the projects are in-flight," says Jung, adding that they expect Flagscape to have wiki capabilities within six months. "We are currently defining requirements and looking at avenues of integration."

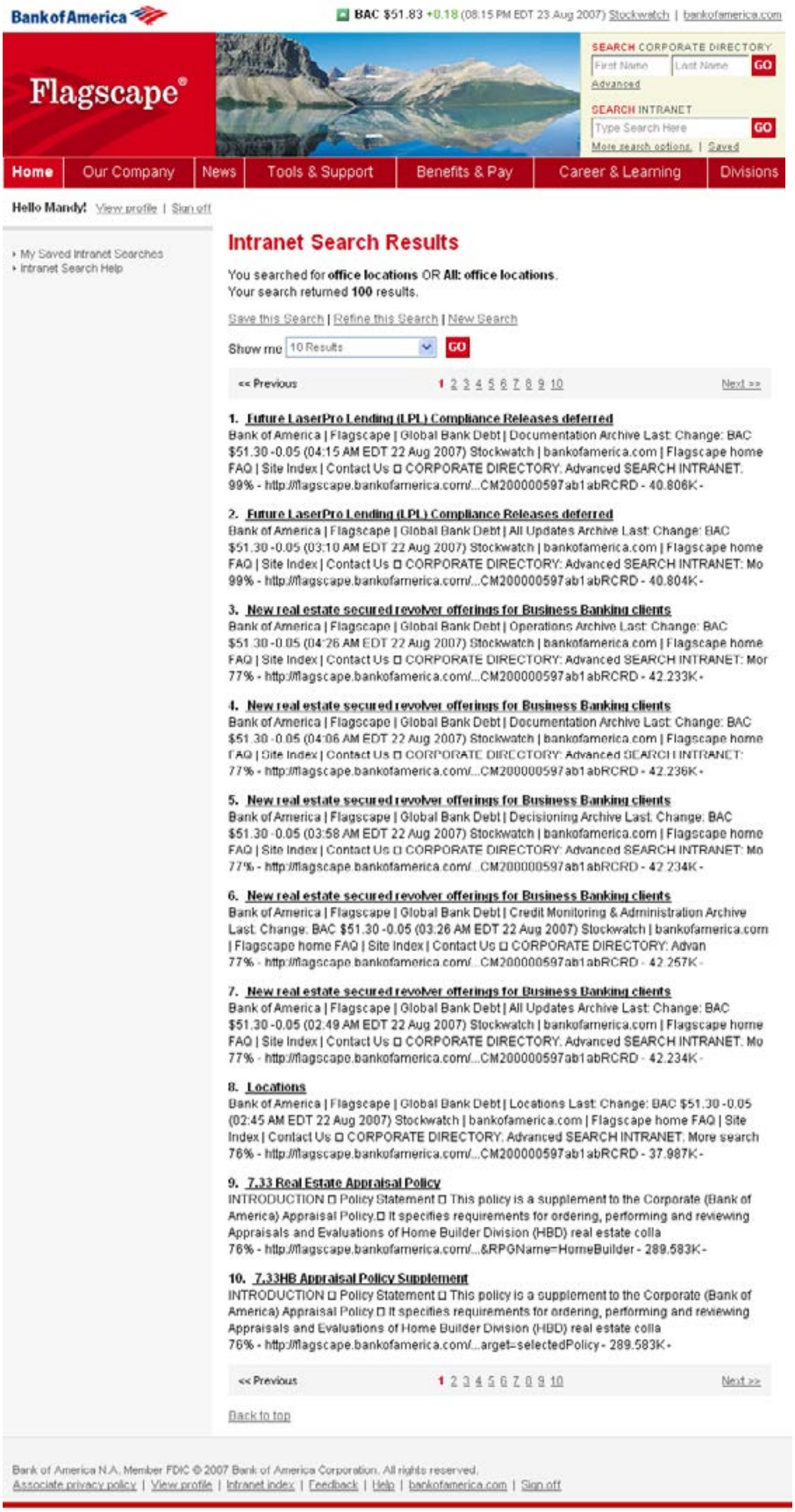
Search

After convening a cross-functional team to evaluate search vendors, Bank of America's intranet team chose a new search technology to replace its existing technology in the fall of 2007.

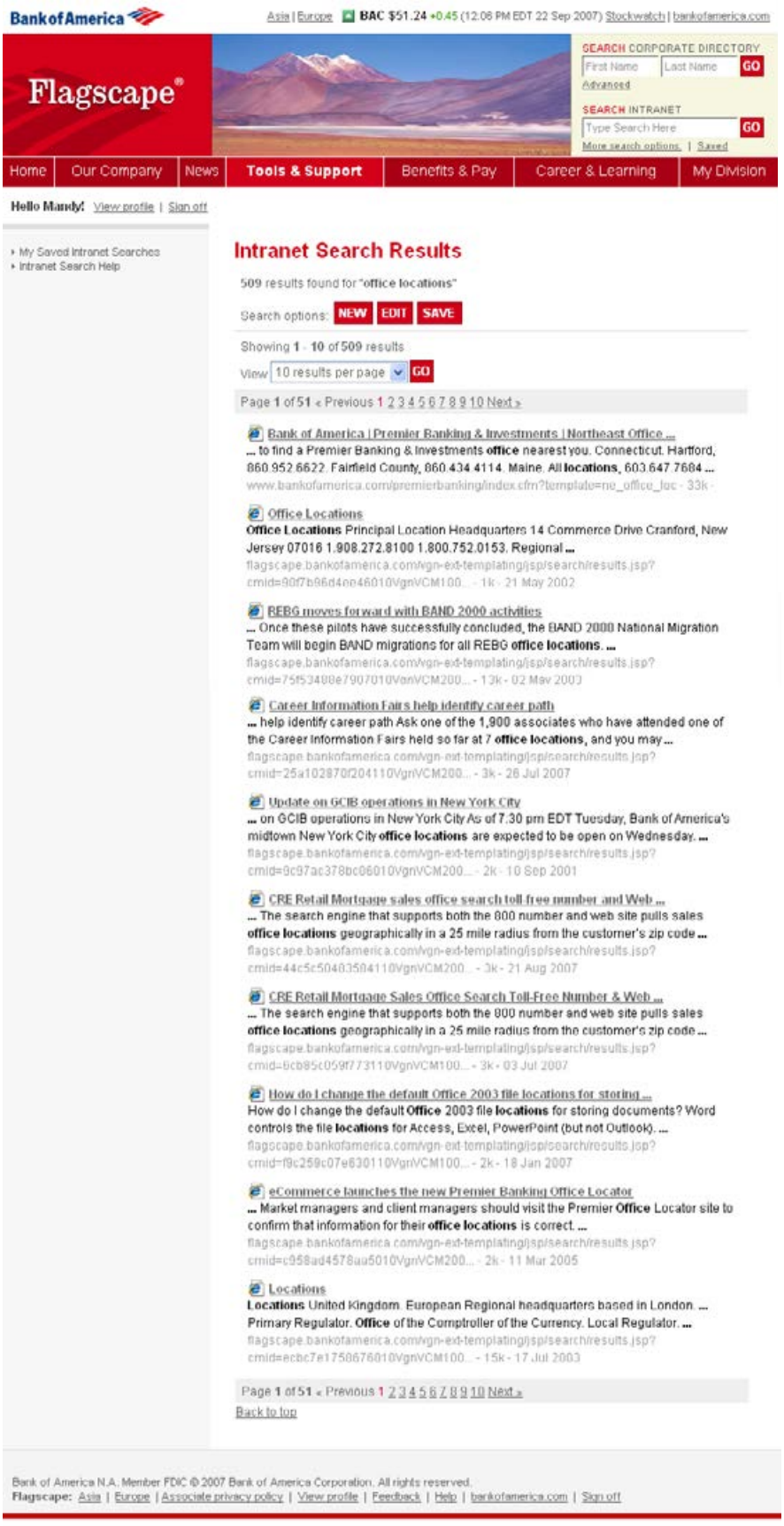
"Relevant search results have been challenging," says Linton, "And have been a source of frustration within our user community. This is a big issue for our intranet, one that we hope to improve with our new search engine."

As an interim step, the team implemented related-links functionality to enhance the existing search application. Once it chose the new search appliance, the team's first project phase consisted of replacing the search engine and making some minor usability improvements.

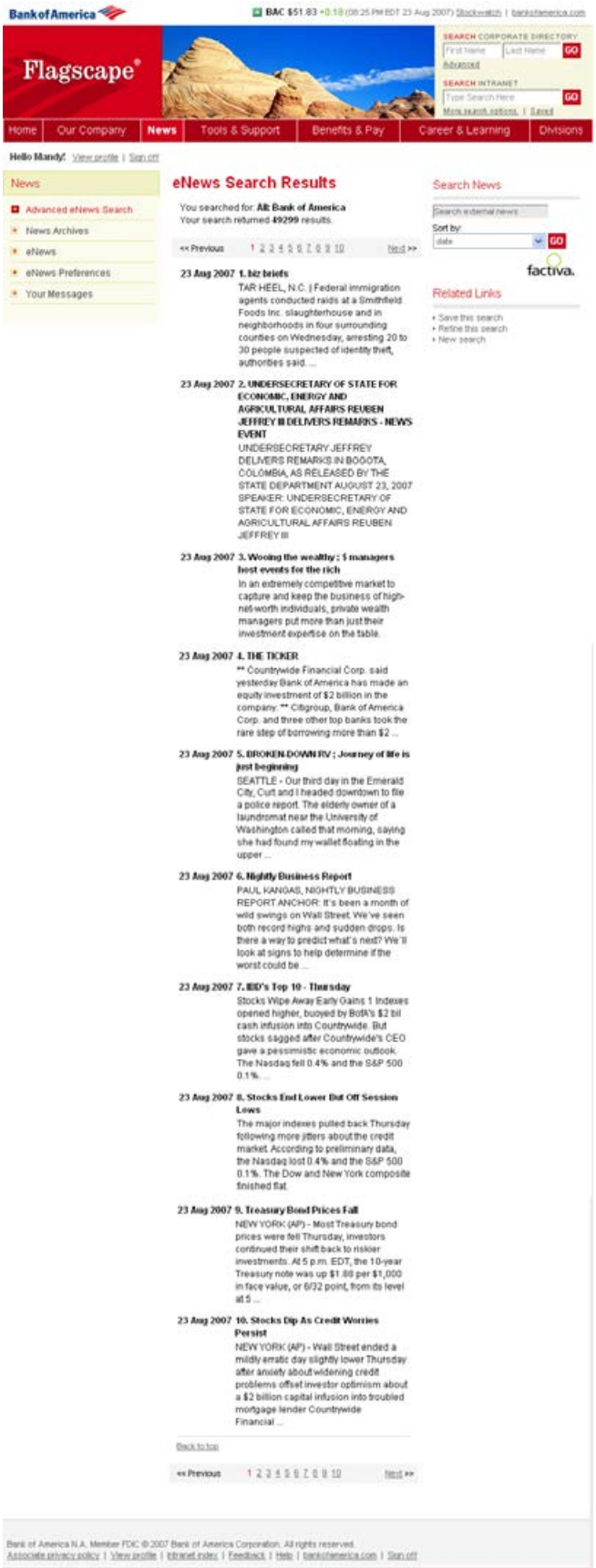
As of this writing, the team has not announced the new search technology changeover to the general bank population. "We are being very careful not to start promoting this until we feel 100% comfortable with the relevancy of results we are getting," say Linton. "We still have some refinements that need to be made and already have two more phases planned for the first of the year to further enhance the usability and relevancy."



Pictured: A search for office locations using the site's old search engine.



Pictured: The 'office locations' search using the new search engine, which returns more relevant results.



Pictured: A search for mentions of Bank of America in the news using Factiva/Dow Jones search. The bank currently uses eNews for Internet news search. As the screen shows, it works very well and returns relevant results.

DESIGN PROCESS AND USABILITY ACTIVITIES

Usability Methods Phase I: Release 4.0 to Release 5.0

When the User Experience team formed in 2003, members were immediately charged with overhauling the site. They inherited a complex site with an enormous amount of assets. "We faced the challenge of an intranet at Bank of America that comprised more than 1.5 million disparate pages of information across approximately 1,000 individual sites and 4,000 Lotus Notes databases," says Linton. In deciding what to change in the redesign from Release 4.0 to 5.0, the team took a research approach. They narrowed their methods down to the following: card sorting, heuristic evaluations (informal), surveys (email), user testing of new design prototypes, user testing of the old intranet, and studying the server logs.

"We decided what to do using the research we uncovered," says Linton. "We knew we had to completely redesign the navigation structure of the site—we used the card sorting exercises and time-on-tasks measurements to determine the approach for that. We knew we had to completely redesign the site. We used the new branding guidelines and surveys from users to determine the final design. We knew we wanted to move to a more task-based navigation structure, so we used metrics and end-user input for that as well. We had definite goals for each redesign, it was very clear to us what we needed to achieve with each release."

Linton outlines the redesign's research methods:

User Testing: Participants were asked to perform 20 tasks on the site, without assistance, in a one-hour session.

Card Sort Studies: Associates were tested to gain insight into how they would sort the site's content into logical groupings. These groupings provided a foundation for the architecture and navigation of the new Associate Portal. According to Linton, "The response/results we got from the several card sorting activities were extremely helpful. That study determined our site navigation that we still use to this day."

Design Survey: Hundreds of associates responded to an Associate Portal survey, providing valuable feedback on five proposed homepage designs. Also, in a later visual design survey, participants were asked to evaluate five possible site design prototypes.

Voice of the Customer (VOC) Feedback: An overview of the VOC feedback collected from the Associate Portal's *Contact us* section was categorized and distributed to the User Experience team weekly throughout the design process. Linton estimates that 80% of the redesign was based on this feedback.

Server Log Research: The new design's task-based navigation (top task module) utilized Web Trends reports to identify the most commonly performed intranet tasks.

Card Sort Studies

Linton explains the two types of card sort exercises used in the Release 5.0 project as follows.

Open Card Sort

"In the open card sort studies we performed, participants were asked to sort cards into logical groupings and then name the groupings," says Linton. "Participants were able to create as many card categories as they felt were appropriate. During the card

sort exercise, participants were asked to order the cards' groupings by importance. If participants were uncomfortable sorting a card under one of their groups, they had the option of creating a group referred to as 'Unsorted.' Several reoccurring themes were identified based on the participant-defined headings."

User Testing

During the user testing session, the team asked users to complete a series of tasks (without assistance). The following variables were tracked for each task:

- **Time on Task**—the time required to perform a task.
- **Number of Clicks**—the number of clicks required to complete a task.
- **Completion Rate**—frequency with which users successfully completed the task within the allotted time.
- **User Difficulty Rating**—subjective difficulty rating that users provided for each task.

Results of User Testing

"The time-on-task measurement started as soon as the participants maximized their browser to the Associate Portal homepage, and was stopped as soon as they reached the desired page," says Linton.

EXAMPLE TASK MEASUREMENT RESULTS

ID	Task	Average Time on Task		
		4.0	5.0	Difference*
1	Stock Quote	16	23	7
2	Retirement Options	25	23	-2
3	Redeem Rewards	72	43	-29
4	Technical Support	54	18	-36
5	Expense Report	45	9	-36
6	Meeting Room	69	13	-56
7	Contact Information	12	7	-5
8	Travel Arrangements	44	22	-22
9	Order Supplies	50	17	-33
10	Job Postings	23	22	-1
11	Associate Discounts	70	42	-28

* The Mean Difference is the difference between the average times on task measurements for each version of the intranet design.

Usability Methods Phase II: Release 5.0 to Release 6.0 (current site)

When the team decided to update the site again (moving from release 5.0 to the current 6.0 redesign), it once again had many usability challenges to surmount. "With release 5.0, there were too many different places for users to look for navigational information on the Portal's secondary pages," says Linton.

"Users were not sure where to look first. There were four different types of navigation [see image above] and over 50 links above the fold. As a result, the *Top Tasks* and the secondary navigation links are often missed and users spent an exorbitant amount of time reading through all the links."

Linton continues, "In addition, most users did not use the Portal's secondary navigation headings, which made it very difficult to scale the site. Placing the secondary navigation in the top navigation bar restricted the number of headings that could fit across the top of the page. At that time, most of the external links were displayed in the *Resources* area, which was already filled with links. If users typically were not sure which global tab contained their desired information, they oftentimes would mouse over the tabs to read their descriptions. This type of functionality was not available on the Portal at that time."

According to Linton, the release 5.0 site architecture was developed primarily to link to external content. "Very little of the content was actually housed in that site," she says. At that time, the team estimated that they might have to add up to 500 additional pages to accommodate the next four major sites slated for integration on the road map. As Linton notes (and the image below shows), they were also "lacking the page real estate to devote to promote individual initiatives within the site."

RESULTS

To get the site from release 5.0 to 6.0, the User Experience team compiled a list of the navigation-related issues that were documented through the user studies and VOC/VOA. They then conducted another closed card sort on over 100 of the proposed content items to identify potential overlaps and gaps in the current headings.

"Next, we discussed, as a team, the advantages and disadvantages of several different navigational approaches," says Linton, adding that they focused on an approach's ability to push business initiatives; meet scalability, ease of use, and ADA compliance requirements; and pass trunk tests (Where am I? How did I get here? What can I do? How do I get home?)

Follow-Up Activities

Specific activities that resulted from the research include:

- Based on results from the card sort, the team changed the *Benefits & Money* tab to *Benefits & Pay*.
- Also based on the card sort, they changed the *Career* tab to *Career & Training*.
- Because they found overlapping content items, the team conducted a quick survey to determine the best location for the content, and then provided adequate cross-links from within the other menu heading.
- The team moved the secondary navigation (which had been underneath the global navigation), to the page's left side.
- Adding rollover menus gave users direct access to content that was two or three levels into the site architecture. The rollovers also offered an overview of a tab's contents.
- They added ALT text descriptions to all global tab headers, briefly explaining the information under each tab.

- Adding drill-down menus provided navigational context, helping users understand their location within the site architecture. Users can also access the lower-level pages by first clicking a tab heading, and then drilling down through the headings. The team says this approach is especially useful for novice Web users and for users with disabilities.
- Incorporating the *Resources* links into the site architecture left considerable real estate available to highlight promotional initiatives.

Surprise Findings

"The time-on-task measurements were the most surprising when you looked at the differences between the measurements of Release 4.0 to Release 5.0," says Linton. "Some minor adjustments we made to the look and feel and placement of some links gained huge rewards. In addition, the card sorting activities yielded some surprising results in that the categories that most associates placed some tasks in were not what was expected."

LESSONS LEARNED

Lessons learned from Mandy Linton:

Establish and circulate standards early. "Not having our UE/Design/Branding standards together to roll out to our administrator community until this past December has been very difficult. We are now being forced to go back and audit all the sites that are out there and communicate to administrators that they need to make updates to their content or files. This has become incredibly time consuming."

Carefully consider fixed width vs. liquid layouts. "When we launched Release 5.0, we decided to go with a fixed-width layout for the whole site. Going with the fixed-width approach allowed us to more quickly/easily create templates within our content management system. Now that the standard resolution has switched from 800 wide to 1024 wide within the bank, it makes sense for us to move to a liquid layout. Also, with the rollout of ADA (Section 508) guidelines, this will allow users to control their font sizes within the browser, which they couldn't do with the fixed-width approach.

Bankinter S.A.

Using the intranet:

Bankinter is a commercial bank, ranked as one of the top six Spanish banks. Its success can be attributed to its commitment to technology, specifically its multi-network and multi-channel strategy for distributing financial products and services. In the 1990s, Bankinter was one of Spain's first banks to launch several alternative banking channels (telephone, virtual banking, and so on). Today, these innovations are an essential part of its multi-channel network.

Headquarters: Madrid, Spain

Number of employees the intranet supports: 4,225

Locations: throughout Spain

Sales (2006): EUR 820 million

Design team:
In-house, by Bankinter's User Experience team

Members: Sonia Colino Merino, Director of Knowledge Management; María Pilar de Terán Temprano, Director of User Experience; Julian Raúl Martínez Márquez, Technical Systems; Manuel Pallarés Alvarez, Director of Internal Communication; Francisco Vicente García Ramos, Director of Internal Clients Projects Management

SUMMARY

Employees at Bankinter appreciate the intranet; their use of it has progressively grown over the years as its designers have become increasingly in tune with users' tasks and needs.

The predominant color, orange, was selected for the site because it's the corporate color and thus matches the branding and organizational culture. The other reason the designers chose such a bold color is that they say it communicates "vitality, energy, and youth." And the site is indeed contemporary and a leader in intranet design. It offers the usual necessities, plus applications that fully help people get their jobs done.

The homepage looks clean and inviting, but still has much-needed information and acts as a conduit to the entire intranet. The homepage offers links to almost everywhere, and is reciprocally available from every page.

The top area of the homepage offers a search, and users can choose to search the entire site or subsites. When offering this kind of scoped search, the designers understood that it's best to make the default the simplest and most-used selection, which is typically the *entire site*.

Also in the header area, breadcrumbs help users navigate and acclimate within the design.



Pictured: The Bankinter intranet's header offers a search for the whole site or subsites.

The banner at the top of the page offers links to various types of assistance and feedback. Among them are: *Who can help me?*, which links to a list of the most important contacts in each department; *Suggestions*; and even a simple way to register *Confidential complaints.*



Pictured: The banner at the top of the page offers links to *Who can help me?*, a list of the most important contacts in each department; *Suggestions*; and *Confidential complaints*.

The top left-side navigation area displays a line chart of the Bankinter stock price so employees can keep abreast of their investments. Below this, designers grouped the left-side menu links into categories to make it easier for users to make a selection. Items in this menu include:

- ***Work*:** *Information Center, Client Operations, Manuals, Products, and Software Installation Center*
- ***Human Resources/Employee's Site***
- ***Communication*:** *Directories, Internal Forum, News, Online magazine*
- ***Library*:** *Corporate Presentations, Multimedia Center*
- ***Information*:** *Social Activities, Environment, Public Relations, VoIP telephones, Union section*

In addition, the page footer offers links to bank circulars, official tariffs, and the branch's bulletin board.

As we see on many intranets, the page's main content area features current news and corporate information. High-quality graphics liven up this information and support the messages. The section's lower part highlights the bank's products and its positioning. This helps employees stay well aware of Bankinter's offerings.

Most designers are somewhat anxious that the homepage's look will quickly become stale and boring to users. In our experiences watching intranet usability tests and doing fields studies, we don't find this to be true so long as the actual content changes. But, to keep things dynamic and exciting, the Bankinter designs have two different homepage formats that have a few small but noticeable differences.

One format is more graphical than the other. In it, a large banner with a message and graphic appears at the top of the content area. The headlines appear in bold orange below that, each with a supporting graphic. Subtle gray boxes separate each news item. Links are bold and underlined.



Pictured: The first of two possible formats for the Bankinter homepage has a content area with a large graphic and message at the top. Smaller, high-quality graphics accompany the individual news headlines.

In the second format, headlines are still orange and links are underlined and (typically) black. A large graphic and message dominate the right half of the content area, and the news headlines appear without graphics. This is a rather small change from the first homepage's style, but it's enough to keep things interesting. Even if you want to vary the homepage by having a few different styles, it's important that user interface elements such as fonts and typefaces for headlines and links remain consistent.



Pictured: The second of two possible formats for the Bankinter homepage's content area displays a large graphic on the right side.

Just below the top banner and in the main content area are links to *Our communities,* as well as to Bankinter's external websites.

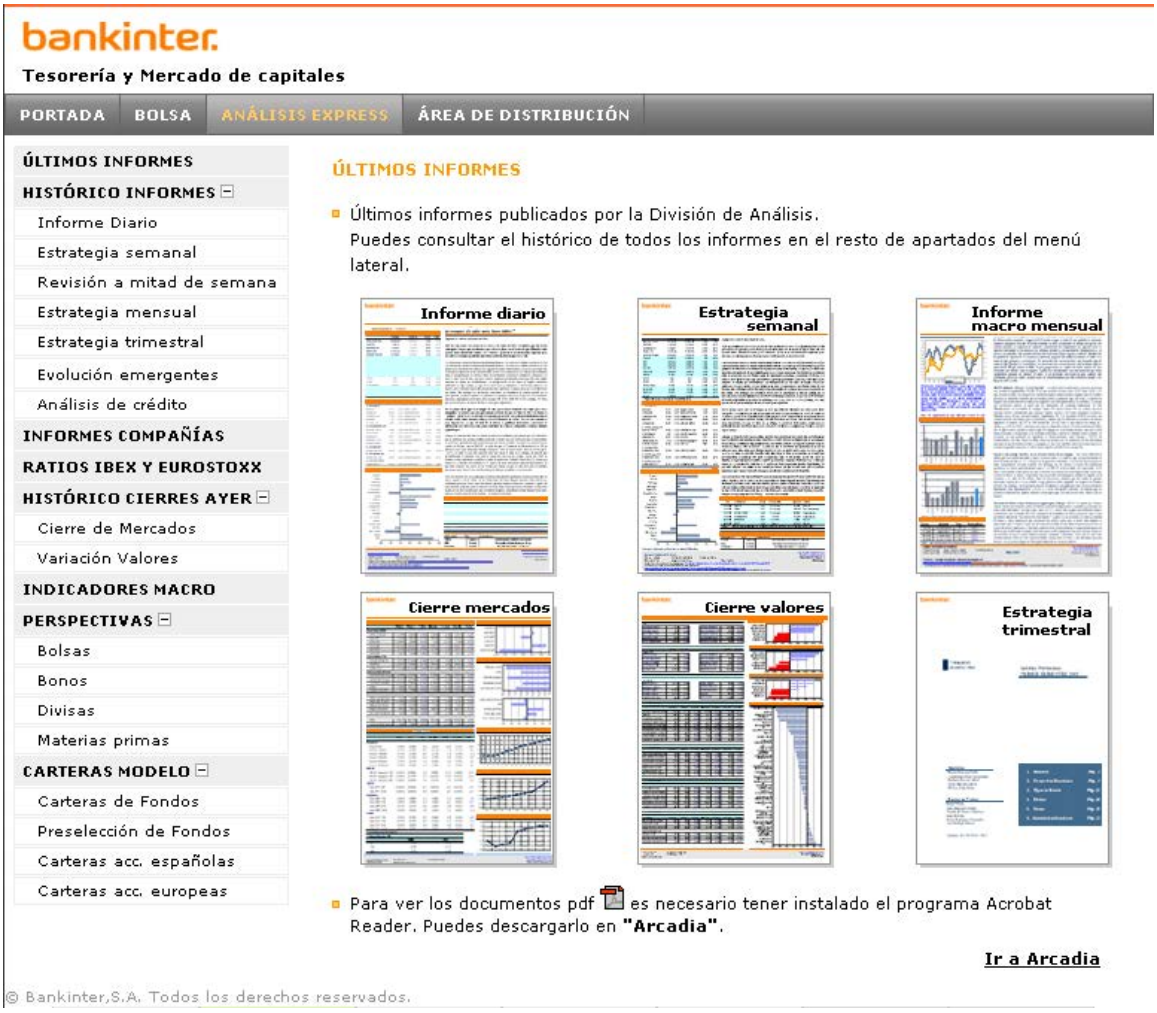


Pictured: Just below the top-level banners are links to *Our communities* and Bankinter's external websites.

The homepage is attractive to people in all the various specialized job roles—including Audit, Risks, Finance Information and Control, Financial Advising, Corporate Reputation, and Environment—as well as those in support roles, such as HR, Marketing, IT, and Maintenance. The subsites that support the varied job roles include homogeneous content and applications that the different Bankinter employee groups use throughout their workday.

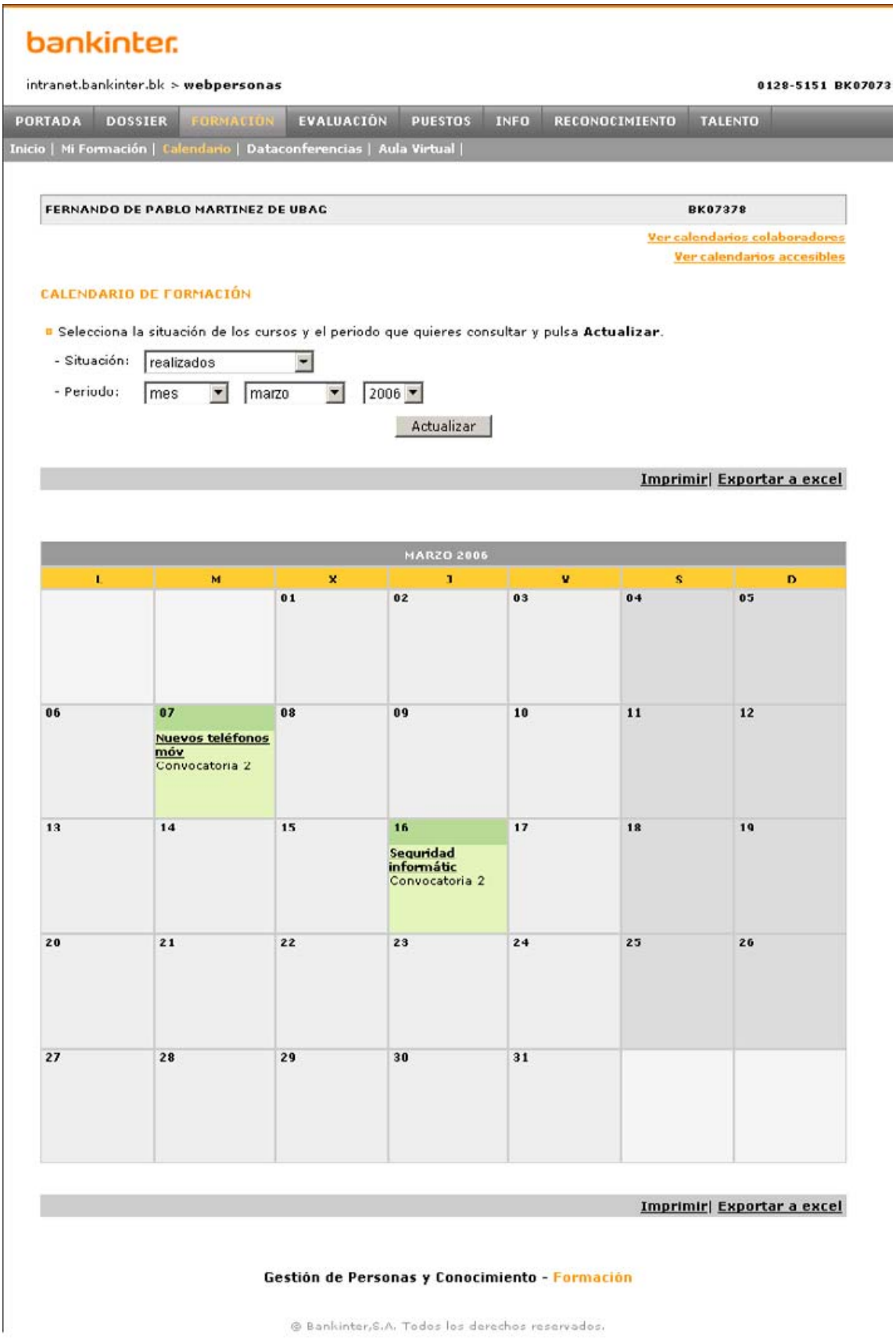
Each community site focuses on a specific group of users who work in the same department or area and need the same tools and information.

Bankinter is very good at managing the information that appears on these subsites. For example, several groups need information regarding stock exchanges, historical markets reports, and investments strategies. Links to all this information are nicely consolidated on a single page. This makes it easy for IT employees to actualize information that will be presented. These data are stored in a unique place and all internal communities capture them. This guarantees that various organizational groups will see the same information at the same time, avoiding mismatching information. It also saves on costs and, on occasion, avoids duplicate efforts.



Pictured: Many different groups at Bankinter need information about stock exchanges, historical markets reports, and investments strategies. This information is consolidated on one page. The data are stored in a unique place and all internal communities capture them, guaranteeing that the same information appears at the same time across the site.

The uncomplicated calendar feature enables people to track training events or other activities. Project managers and directors can access their own calendar information and that of all collaborators. By clicking the links in the cells, users jump to the full calendar entry. Users can also view the calendar by month or week. And, speaking of view, the calendar is very simple: no fancy graphics or widgets here.



bankinter

intranet.bankinter.bk > **webpersonas** 0128-5151 BK07073

PORTADA | DOSSIER | FORMACIÓN | EVALUACIÓN | PUESTOS | INFO | RECONOCIMIENTO | TALENTO

Inicio | Mi Formación | Calendario | Dataconferencias | Aula Virtual |

FERNANDO DE PABLO MARTINEZ DE UBAG BK07378

Ver calendarios colaboradores
Ver calendarios accesibles

CALENDARIO DE FORMACIÓN

Selecciona la situación de los cursos y el periodo que quieres consultar y pulsa **Actualizar**.

- Situación: realizados
- Periodo: mes marzo 2006

Actualizar

Imprimir | Exportar a excel

MARZO 2006

L	M	X	J	V	S	D
		01	02	03	04	05
06	07 Nuevos teléfonos móv Convocatoria 2	08	09	10	11	12
13	14	15	16 Seguridad informátic Convocatoria 2	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Imprimir | Exportar a excel

Gestión de Personas y Conocimiento - Formación

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Pictured: Project leaders and directors can view their own calendars as well as those of the people they manage, helping everyone to stay on target.

Another feature that many people in the organization use is *Engloba,* a transactional environment where all client information is stored. Bankinter employees use this area extensively to learn about, win, and keep clients. Detecting client needs, preferences, financial culture, and economic capacity enables personalized sales campaigns and contributes to marketing strategies.

bankinter

intranet.bankinter.bk > engloba

Cliente: FRANCISCO VICENTE GARCIA RAMOS Nif: 0404040404 E
N.Persona: 21622121 Centro: 0000 División: PARTICULARES
Telef. Particular: 980 980333 Telef. Movil: 467 467467 Más Datos

Manual | Ayuda
desconectar cliente
0128-9851 BK00008

FONDOS | ACUERDO DE GESTIÓN | CUENTAS | SEGUIMIENTO | ALTA DE CLIENTES

FICHA DE CLIENTE

Datos personales

DATOS IDENTIFICATIVOS

Datos personales

- Cliente:	FRANCISCO VICENTE GARCIA RAMOS	- Sexo:	HOMBRE
- NIF:	0450776465	- Estado Civil:	CASADO
- Fecha de nacimiento:	26/09/1971	- Régimen económico:	GANANCIALES
- Nº persona:	21724724	- Nº de hijos:	0
- Centro:	9858		
- División:	PARTICULARES	- Nacionalidad:	ESPA/A
- Situación:	CLIENTE	- País de residencia:	ESPA/A
- Profesión:	LICENCIADO SUPERIOR (PROFESIONAL)	- Idioma:	ESPAÑOL
- Cotitular:	ANA LUISA SEVILLANO FERREIRA		

Ver datos del cotitular

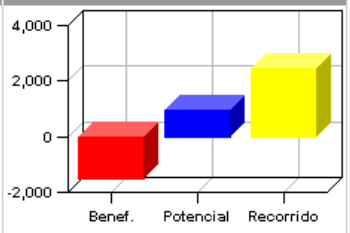
Datos de contacto

- Teléfono particular: 334 980334
- Teléfono móvil: 696 467 696
- Correo electrónico: fvgcia@bankinter.es
- Tutor:

FACTORES DE SERVICIO

Generales		Otros factores de servicio
Teléfono:	ODIADO	MOMENTOS FAVORITOS
Carta:	ODIADO	Ver momentos favoritos
E-mail:	FAVORITO	
Proactividad reactiva:	MEDIA	
Proactividad activa:	INDIFERENCIA	
Nivel de lenguaje fin:	NORMAL	CANALES FAVORITOS
Ver todos los factores de servicio		Ver Medios y canales

POTENCIAL/BENEFICIO

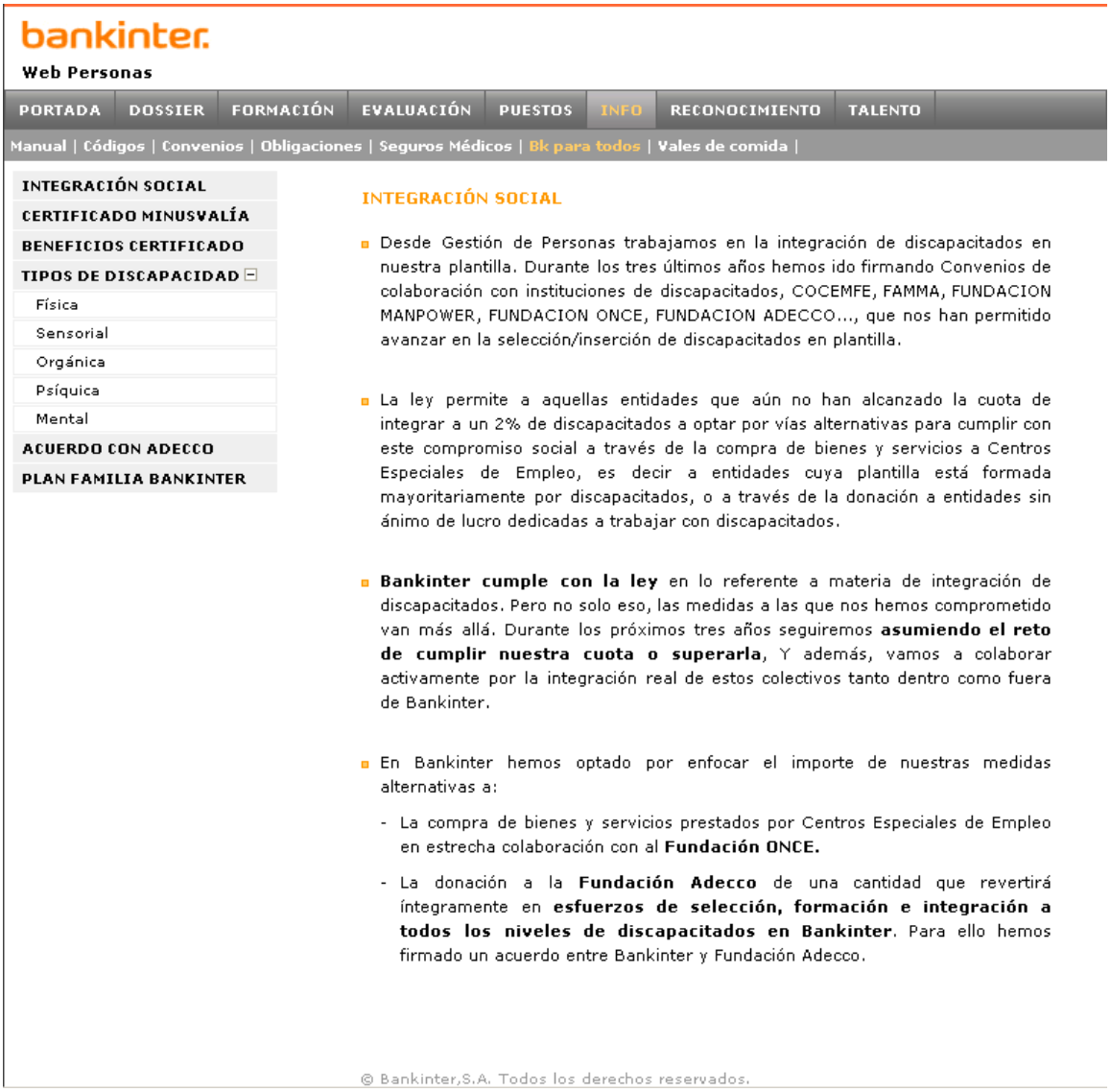
Datos	Cuota	Beneficio
Importe Potencial: 925,00 EUR Importe Recorrido: 22.437,03 EUR Importe Cuota: 925.512,03 EUR Sector: B2	Sin Cuota	

Datos transaccionales

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Pictured: The Bankinter intranet's *Engloba* feature helps employees stay on top of all client information.

In addition to offering domain-specific information, the Bankinter intranet also offers some of the basics, such as HR and policies. This offers necessary support to some 4,200 employees all over Spain, all of whom access the intranet either at work or home. The intranet's *Web de Personas* area offers extensive information about Bankinter's HR policies and benefits. For example, employees can review and edit their employee records, review and sign up for training, and review and create employee evaluations. Also, there's a special space on the site for public recognition of worthy employees. There, the recognized employee's photo is featured along with his or her email address so colleagues are reminded to send a congratulatory note.



Pictured: *Web de Personas*, the Bankinter intranet's HR area, offers policy information, training, and the possibility to conduct and review corporate reviews.

The Bank also encourages employees to contribute to the community at large in support of its Social Action Initiatives, and the intranet supports these goals. The

intranet's *Volunteer Web* section offers volunteer opportunities via national institutions supported by Bankinter.



Pictured: A section of the Bankinter intranet offers volunteer opportunities for its employees through national organizations.

In general, the site's pages are not at all cluttered. In fact, designers make very good use of space and, in particular, of active whitespace. Offering an informative intranet is one thing, but doing that and making it look great is an entirely different thing, and not at all easy. Bankinter has achieved both, providing content and tools people really need in an interface that is both uncomplicated and visually attractive.

URL AND ACCESS

The URL for Bankinter's intranet is: http://intranet.bankinter.bk. The intranet serves as the default homepage for all employees (though they are allowed to change it); it's also bookmarked. All employees can access the site remotely via a virtual private network (VPN).

Microsoft Internet Explorer 6 is the official browser for the intranet.

TECHNOLOGY

Bankinter uses Microsoft Office SharePoint Portal Server 2003 and Windows SharePoint Services technology for building and maintaining the intranet. In addition, some features on the site use:

- Lotus Notes, for manuals and guides visible from the intranet and indexed in search;
- Java—integrated with iframes and Web Services—for transactional features; and
- *Information Center*, a database that's integrated with Web Parts and contains all measurable, bank-generated information.

Bankinter's IT team personalizes the SharePoint Web Parts specifically for the intranet; any new Web Parts it develops are always available for all intranet sites.

The site's design tools include:

- Microsoft Word for design definitions,
- Microsoft Visio for information architecture (IA),
- Photoshop for visual design, and
- Camtasia when screen recorders are required in users tests.

CONTENT MANAGEMENT

CMS Technology

Bankinter primarily uses Microsoft Office SharePoint 2003 (and, to a lesser extent, Lotus Notes databases) for content management. Specific views of the Lotus Notes databases are adapted to the intranet's look and feel.

Content Maintenance

Sites within the Bankinter intranet fall into three categories:

- **Corporate sites:** Content is addressed to all employees
- **Communities:** Content is focused toward a group of users in the same department or area who share uniform content requirements
- **Private and project webs:** Private, highly specific content or sites to facilitate project collaboration

Each intranet site defines profiles for role-based content management, allowing the administrators to create, design, and maintain content according to their profiles.

Roles include administrators, Web designers, and collaborators who are distributed among the following intranet team areas:

- Knowledge management
- Internet (internal clients, project management, and user experience)
- Content owners

CONTENT ADMINISTRATION ROLES AND OWNERSHIP			
	CORPORATE SITES	**COMMUNITIES**	**PRIVATE/PROJECT WEB**
CREATE	Knowledge management Internet	Knowledge management Internet	IT
DESIGN STYLE	Internet	Internet	Content owner
DESIGN STRUCTURE	Knowledge management Internet	Internet Content owner	Content owner
MAINTAIN STRUCTURE	Internet	Internet Content owner	Content owner
MAINTAIN CONTENT	Knowledge management	Content owner	Content owner

Pictured: Bankinter's intranet governance and content ownership responsibilities.

CMS Standards

Since 2004, Bankinter's intranet has been defined by the design standards outlined in its *Style Book*. Within the guide, each chapter is divided into sections detailing the subject area and giving users specific guidance on building content and maintaining the site. The guide was a collaborative effort between IT and the User Experience team and was developed with the following goals in mind:

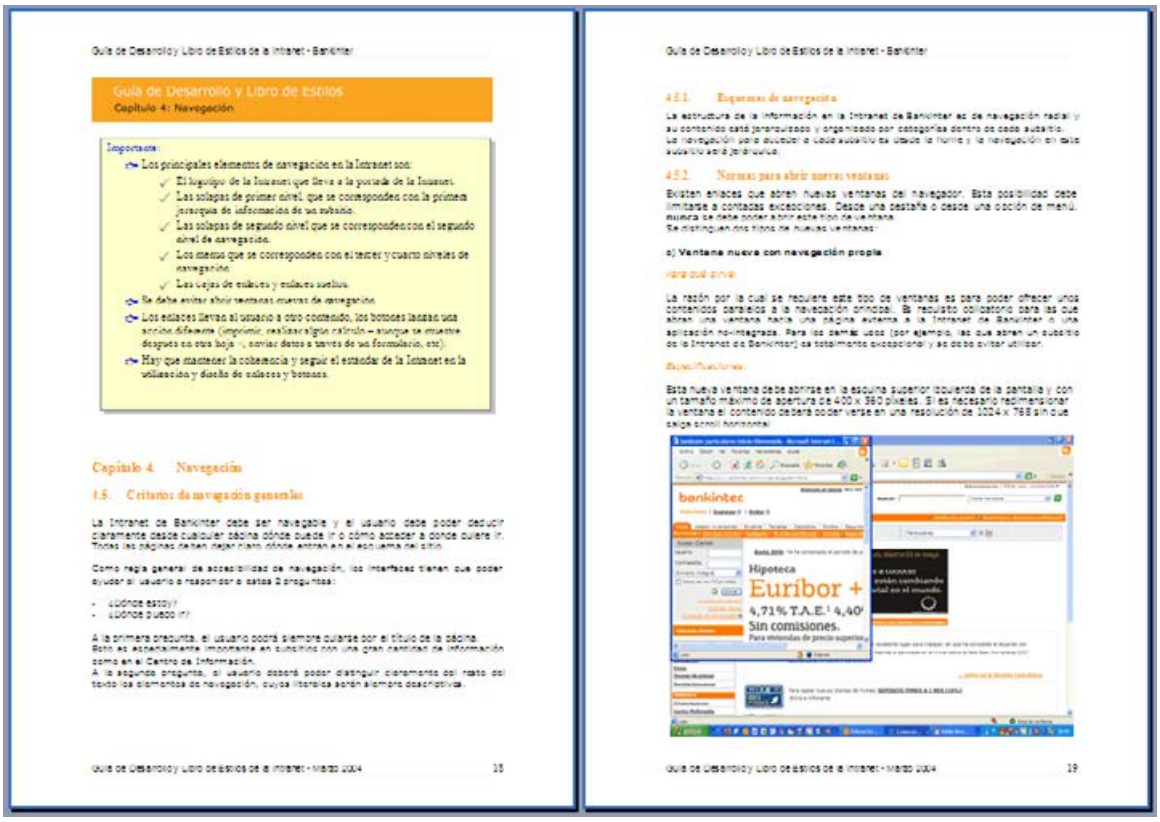
- To be useful for everyone involved in the site's design, development, and content management.
- To contain all the elements necessary for team members to fulfill their duties according to a standard of quality.
- To make site development easier by putting the basic principles of the site's design, navigation, content, and user experience in the hands of the content authors and administrators and giving them clear criteria to follow.

The *Style Guide* defines a unified look and feel and consistent navigation based on several basic principles:

- Easy to use
- Easy to learn
- Standardized
- Coherent
- Distinct
- Efficient to navigate
- Personalized



Pictured: The template for editing homepage content lets users change text, links, and images.



Pictured: A page from Bankinter's *Style Guide*.

In addition to providing a comprehensive *Style Guide* for the site, the intranet team also conducts training sessions for content administrators and editors (especially prior to launching a new site) and offers on- and offline Help documentation for SharePoint utilities.

INTRANET TEAM



Pictured: The Bankinter intranet design team. Fernando De Pablo (far left) and David Heras (far right) are experts in designing, transforming, adapting, and creating new images using the most innovative techniques. Julia Ortiz (center) and Francisco Morales (third from left) design functional analysis for all sites, applying suitable usability, design, and navigability to meet user needs. Francisco García (second from left), Director of Internal Clients Project Management. Pilar de Terán (not pictured), Director of User Experience.

Although HR owns the site (and has owned it historically), several departments work together to manage the site on a day-to-day basis:

- Internal Clients Projects Management (3 people)
- Knowledge Management (3 people)
- User Experience (3 people)
- IT (staff size varies, depending on needs)
- Internal Communication (3 people)

- Content managers throughout the organization (hundreds, continuously changing)

The site is designed by the User Experience team, which resides in the Bank's Internet Department. They doesn't engage outside agencies for design or development efforts.

Because each bank department contributes to the intranet budget, the site operates without a fixed budget for its operations. This arrangement allows the intranet to be an integral part of the overall organizational business strategy.

TIMELINE

Prior to 2003, Bankinter's intranet was essentially a homepage with news, basic utilities, and links to other sites. The intranet's subsequent evolution included several key milestones:

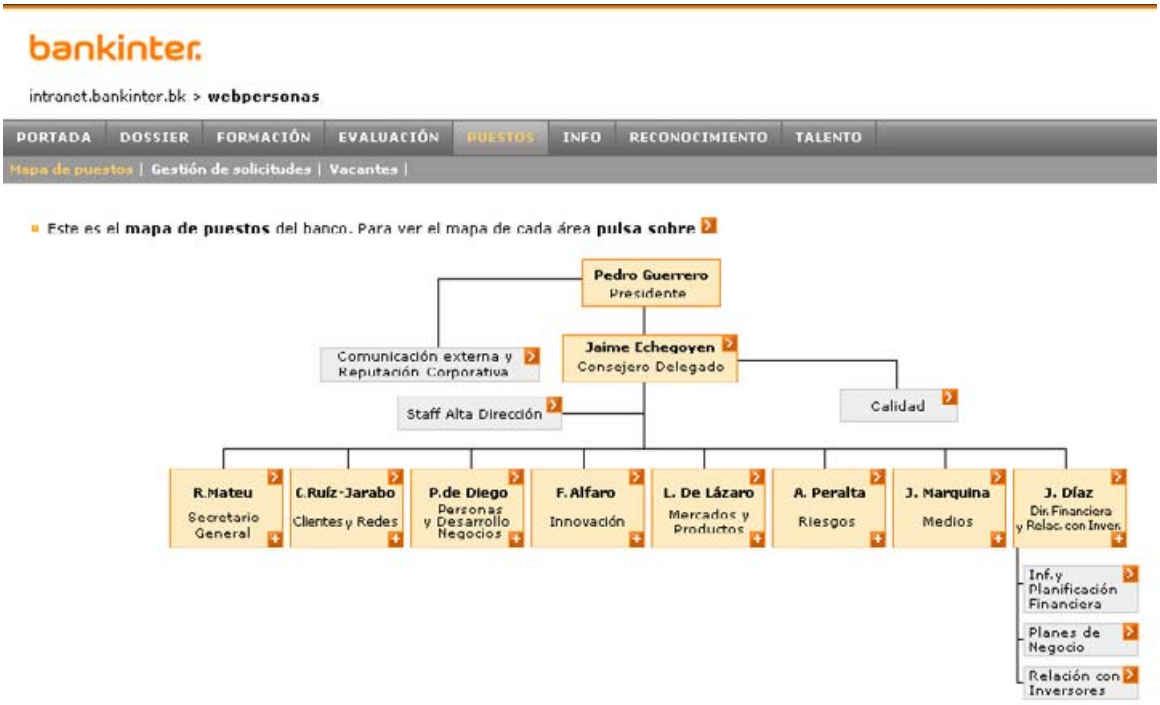
- **September 2003:** New intranet launches
- **December 2003:** *Web de Personas*, the HR hub, goes live
- **2004:** Training Web and unified risks system go live
- **January 2005:** Minor homepage design changes
- **January 2005 to present:** New content, including an organization chart with the description and mission of all company posts
- **December 2006:** Current homepage launches



Pictured: This is the old Bankinter homepage. The navigability, information, and design are completely different from the current site.



Pictured: Bankinter's intranet homepage in 2005. This site evolved into the current site design.



Pictured: An organization chart that links to pages for jobs descriptions, the knowledge and training required for open positions, and career development information.

GOALS AND CONSTRAINTS

The site's goal is to become the central repository of knowledge and tools for all employees across the organization.

The design team faces three ongoing constraints:

- Many users are in the habit of using Windows-based applications to conduct their work. Helping users adapt to Web-based tools has been a hurdle to overcome.
- The use of Lotus Notes, email, databases, and forums are popular among the site's user base. The intranet has to raise the bar to meet and exceed user expectations of intranet alternatives.
- It's an ongoing challenge to improve the site's usability and navigation, and to address content managers' concerns over style standards.

The design team's goals for site redesign and for adding new content include:

- Create a unified look and feel and consistent and standard navigation based upon these basic principles:
    - Easy to use
    - Easy to learn
    - Standardized
    - Coherent
    - Distinct
    - Efficient to navigate
    - Personalized
- Provide easy access to work tools
- Improve cooperation and knowledge transmission within the organization
- Provide easy, fast, and cheap self-service content management
- Improve the intranet's communication capabilities

USERS

The Bankinter intranet supports all of the organization's employees (4.225 as of June 2007). The intranet is accessed by 100% of the staff, either at work or at home. Intranet users are located all over Spain.

The intranet supports a wide range of tasks that reflect the widely differing employee profiles across the organization. Job functions span the following disciplines:

HR
Commercial and Sales
Administration
Audit
Risk
Finance Information and Control
Financial Advising

Quality
Maintenance and Buildings
Marketing
Corporate Reputation, Environment, Social Action, Brand
Distance Banking: Internet, Telephone, Mobile
IT

USER TASKS

The site supports a wide range of tasks, including:

- Conducting banking transactions for clients
- Selling finance and banking products
- Looking up client records and information
- Consulting the *Information Center*
- Downloading corporate software
- Reading internal and external news and online magazines
- Accessing applications and utilities such as hardware, VoIP telephones, mobile phones, user access, books, expenses, restaurant tickets, holidays, and employee benefits
- Reading corporate regulations regarding corporate ethics and privileged information
- Posting in forums
- Sending (confidential) complaints and communications relating to bad practices
- Looking up employees, bank branches, and external partners in online directories
- Collaborating on projects, and sharing information and documents
- Applying for volunteer work
- Participating in sports competitions
- Using Web-based IT application tools
- Using multimedia resources, including video, radio, data conferences, and online meetings

BASIC INTRANET FEATURES

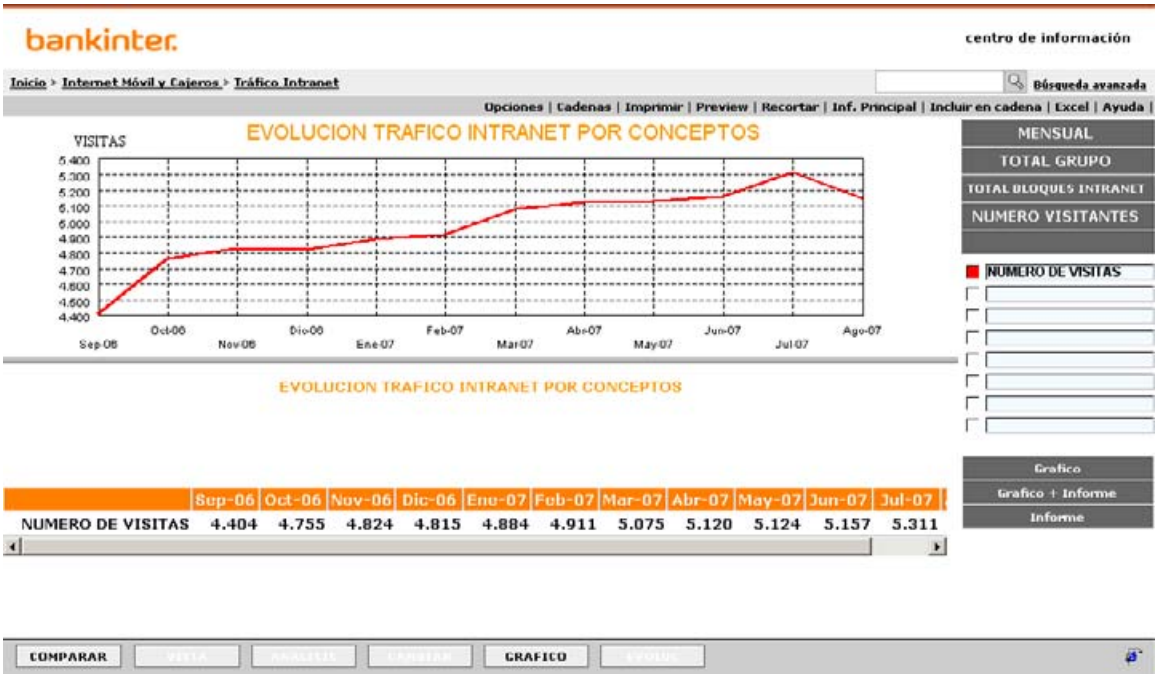
A central homepage serves as the access point for various subsites and is always accessible from each site. The homepage features content that is central to communicating with staff across all bank departments and functions. And several of the site's applications enable users to perform job functions online.

The subsites were created to organize information by subject matter and are developed according to the specific community needs of any given department within the bank.

Subsite examples include the *Information Center* and *Web de Personas*.

Information Center

The *Information Center* is a site area that lets users generate reports and graphical information about every function of the organization. It includes data processing utilities, and each department decides what information and reports will be included in their *Information Center* area. This data is useful across the bank employee's functional areas and serves as a central repository for data relating to nearly every aspect of the bank's functions. According to the design team, users often say that "if something is not in the *Information Center*, it does not exist."



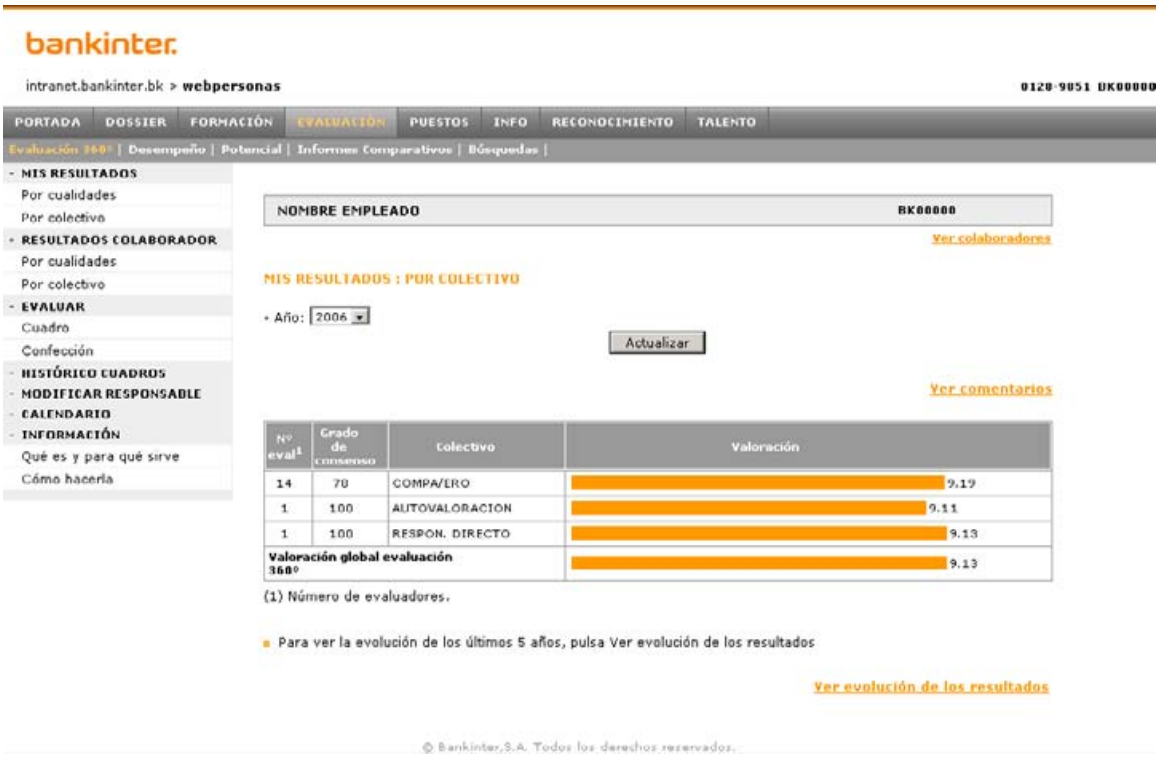
Pictured: The *Information Center*, where users can access reports and graphic information about every area of the organization.

All bank users rely on this information to perform critical job functions. These tools include utilities to capture and share data with other applications: to link reports, access tables and other graphic data, capture screens, export data to Excel files, and generate previews. Prior to the intranet, users had to download this application.

Web de Personas: HR Hub

One of the intranet's most visited and valued sites is *Web de Personas*, which contains all of the bank's HR tools and employee information, including:

- Personal information, which can be accessed and edited
- Online training
- Employee evaluations, which users can execute—and view the results of—online
- Career development, including org chart, job descriptions, and the knowledge and training required for positions
- Applications for internal job postings
- Employee recognition
- Personal development and talent management



Pictured: The employee evaluation page lets users conduct their evaluations and see the results online.

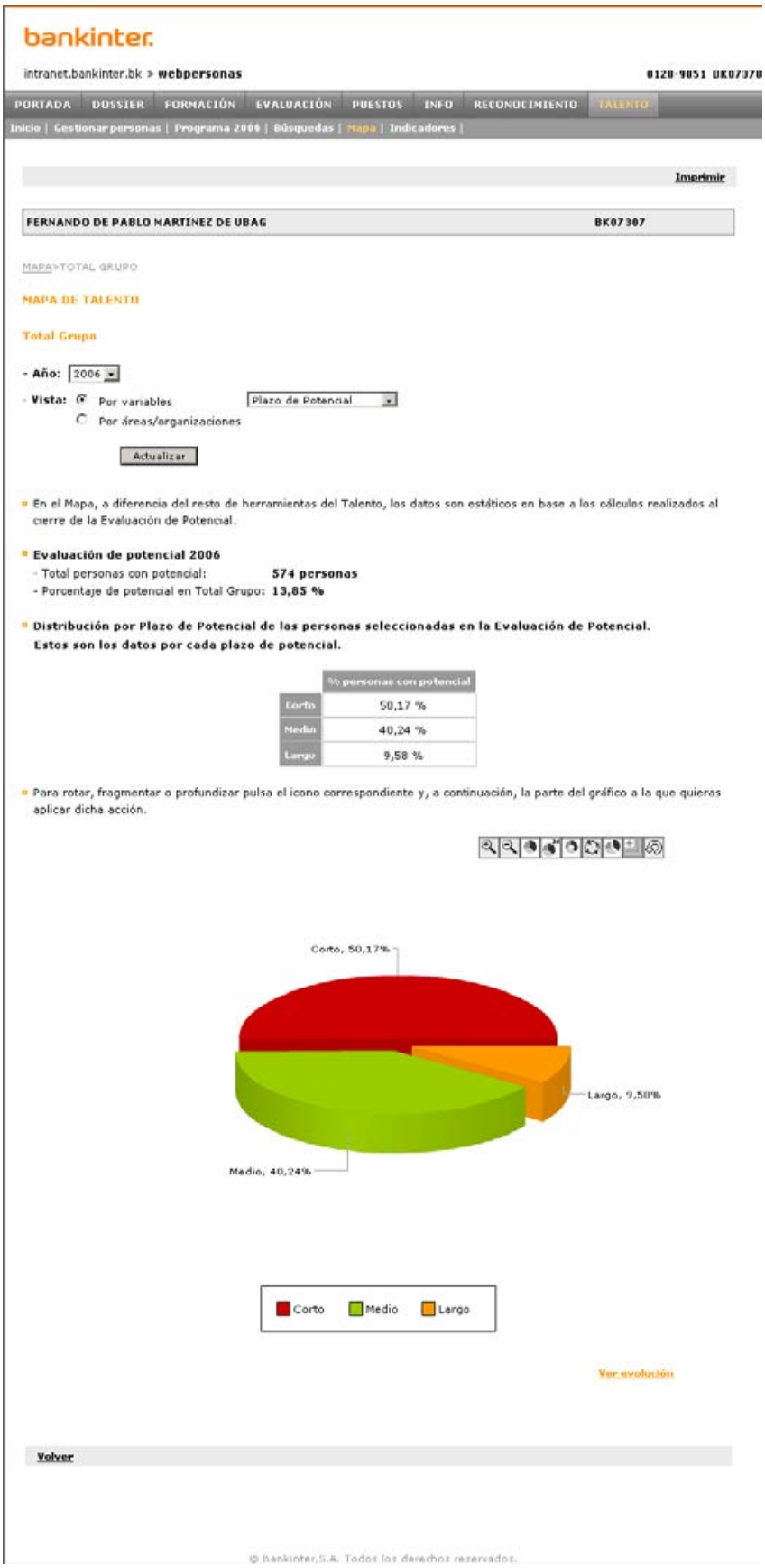
Web de Personas also includes the company's *Talent Map*. Bankinter's talent program is a personal development program that seeks to identify and promote talented individuals within the organization. The *Talent Map* has defined criteria to manage the program. It shows data about the program (including the number of people, percentages, and averages) in tables with accompanying graphic representations.



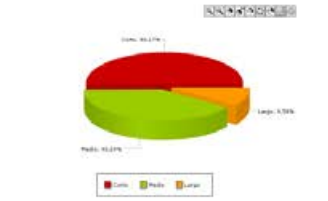
Pictured: The *Talent Map*. Users can search the map using a variety of criteria and identify the concentration and distribution of talent inside the company. This screenshot shows the company's overall talent distribution.

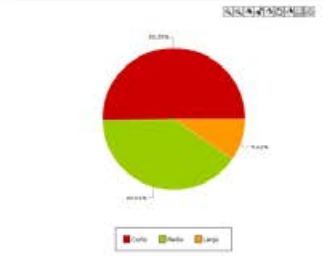
The *Talent Map* presents graphical data using an animated, interactive, data-driven flash tool that lets users show graphic results and adjust its appearance. Users can interact with the tool, manipulating the graphics, grouping information, or zooming in on the details. They can change the type of graphic (to pie charts, bar charts, line graphs, and so on) or see 2-D or 3-D views.

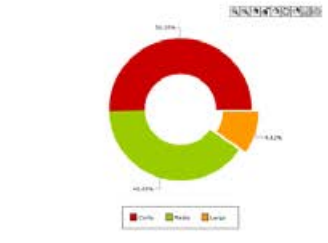
Web de Personas is the first section of the site to feature this tool.

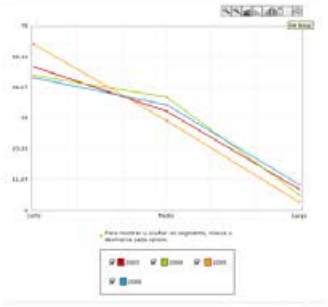

bankinter
intranet.bankinter.bk > webpersonas
0128 9851 BK07370
PORTADA DOSSIER FORMACIÓN EVALUACIÓN PUESTOS INFO RECONOCIMIENTO TALENTO
Inicio | Gestionar personas | Programa 2006 | Búsquedas | Mapa | Indicadores |
Imprimir
FERNANDO DE PABLO MARTINEZ DE UBAG BK07307
MAPA>TOTAL GRUPO
MAPA DE TALENTO
Total Grupo
- Año: 2006
- Vista: Por variables Plazo de Potencial
Por áreas/organizaciones
Actualizar
En el Mapa, a diferencia del resto de herramientas del Talento, los datos son estáticos en base a los cálculos realizados al cierre de la Evaluación de Potencial.
Evaluación de potencial 2006
- Total personas con potencial: 574 personas
- Porcentaje de potencial en Total Grupo: 13,85 %
Distribución por Plazo de Potencial de las personas seleccionadas en la Evaluación de Potencial.
Estos son los datos por cada plazo de potencial.
% personas con potencial
Corto 50,17 %
Medio 40,24 %
Largo 9,58 %
Para rotar, fragmentar o profundizar pulsa el icono correspondiente y, a continuación, la parte del gráfico a la que quieras aplicar dicha acción.
Corto, 50,17%
Largo, 9,58%
Medio, 40,24%
Corto Medio Largo
Ver evolución
Volver
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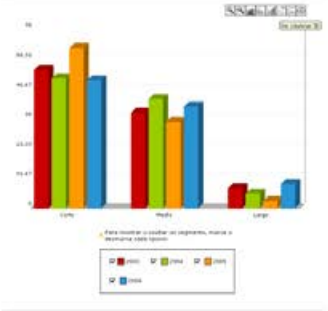
Pictured: *Web de Personas* is a personal development program used to identify and promote talent within the organization.

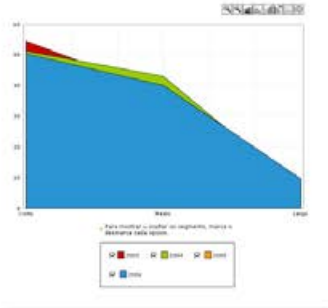












Pictured: This page shows the several data visualization choices available to users for manipulating data into charts and graphs (in the site's Flash-driven graphing tool).

Other popular sections

The Bankinter intranet also features several other popular sections, including:

- *Videoconference, which* contains all the information and links necessary to conduct a Web meeting. Users can invite guests, share applications and documents, chat, and use webcams and VoIP.
- Although multimedia content is located throughout the intranet, the *Multimedia Center* aggregates all video and audio content for easy access. Users can access content such as speeches (live streaming or on demand), marketing campaigns, and new product launches.

bankinter.

Centro Multimedia

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02/07/2007

bankinter. Seguros de Vida

Título: Seguros
Autor: Division de Seguros
Categoría: Comunicacion Interna
Duración: 53'3"
Descripción: Impacto nueva normativa de Seguros
Detalles Reproducir

28/06/2007



Título: Nuevo Tramo CAS
Autor: Division de Seguros
Categoría: Formación
Duración: 32'45"
Descripción: Formación Nuevo Tramo CAS
Detalles Reproducir

28/06/2007



Título: Videochat de previsiones de mercado tercer trimestre 2007.
Autor: Renta Variable
Categoría: Comunicación
Duración: 59'12"
Descripción: Conoceremos la previsión de Mercados, tipos de Interes y divisas para el trimestre en curso.
Detalles Reproducir

20/06/2007



Título: CRM Comercial
Autor: CRM
Categoría: Comunicación Interna
Duración: 3'2"
Descripción: Agenda Comercial, Alertas, Potenciales, ...
Detalles Reproducir

13/06/2007



Título: CRM Analítico
Autor: CRM
Categoría: Comunicación Interna
Duración: 2'11"
Descripción: Actividad, Estudios y Análisis de Clientes
Detalles Reproducir

Volver

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Pictured: In the *Multimedia Center*, users can find out about important company events. The site classifies audio and video assets by multiple criteria and includes a search tool so users can narrow their searches accordingly.

The intranet also features subsites relating to projects that align with bank interests outside of the core business. Among these are projects related to social action, corporate reputation, branding, the environment, and the Bankinter Foundation of Innovation. The intranet also includes an area for the bank's trade union.

Collaboration Tools

Work-based communities and project sites are managed by SharePoint's collaboration components. These tools make it easy for Bankinter to create sites and subsites; manage documents, calendars, tasks lists and alerts; and facilitate surveys and discussions. The Lotus Notes forum (Web version) is another popular collaboration tool that Bankinter uses.

The intranet also supports other people-centric communities:

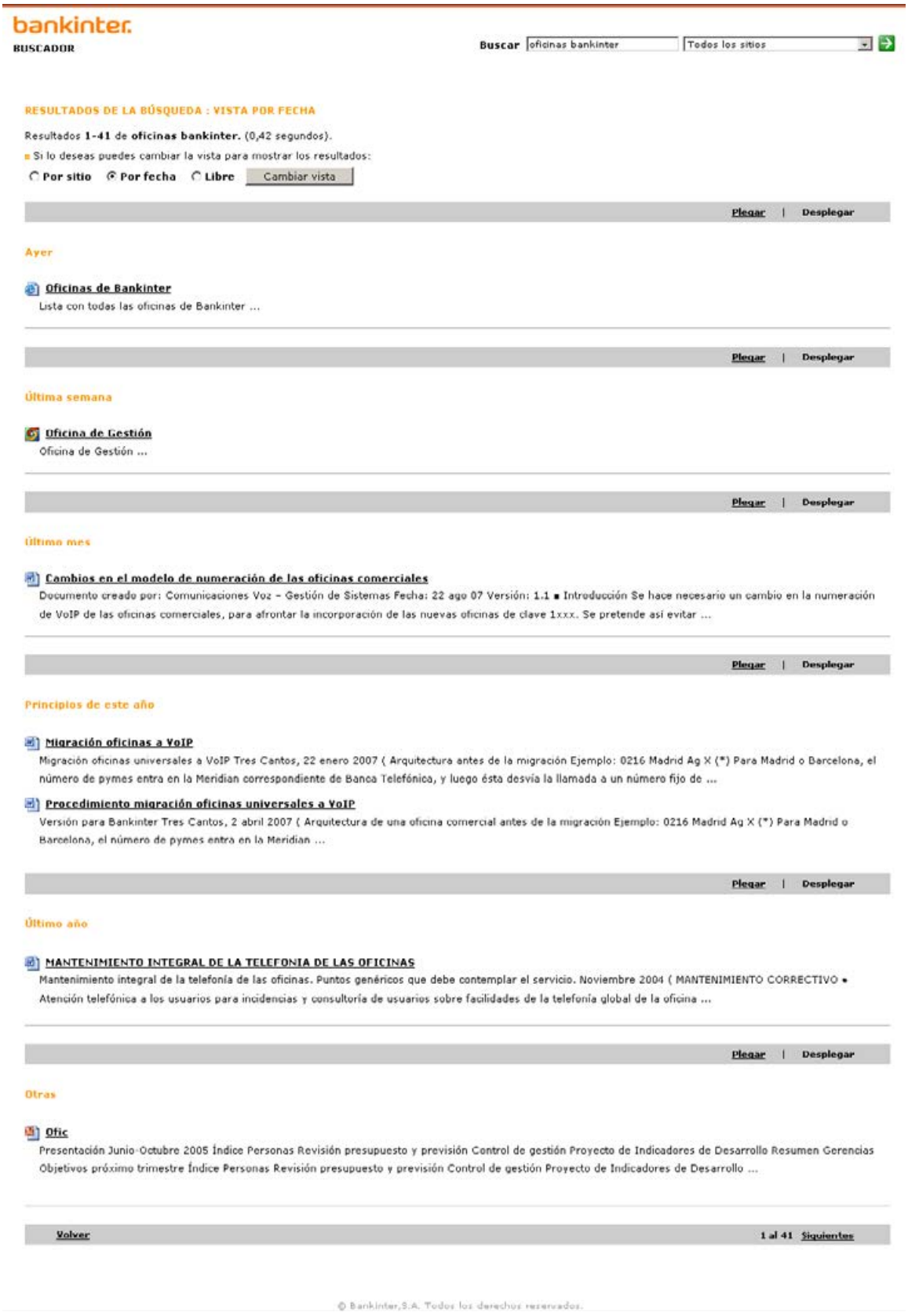
- A sports club
- Online magazines with articles about the company, leisure activities, interviews, and games
- A notice board of discounts and special offers for employees
- A second-hand market for buying, selling, and renting
- A volunteer area that lets users collaborate and share experiences related to volunteer projects

Search

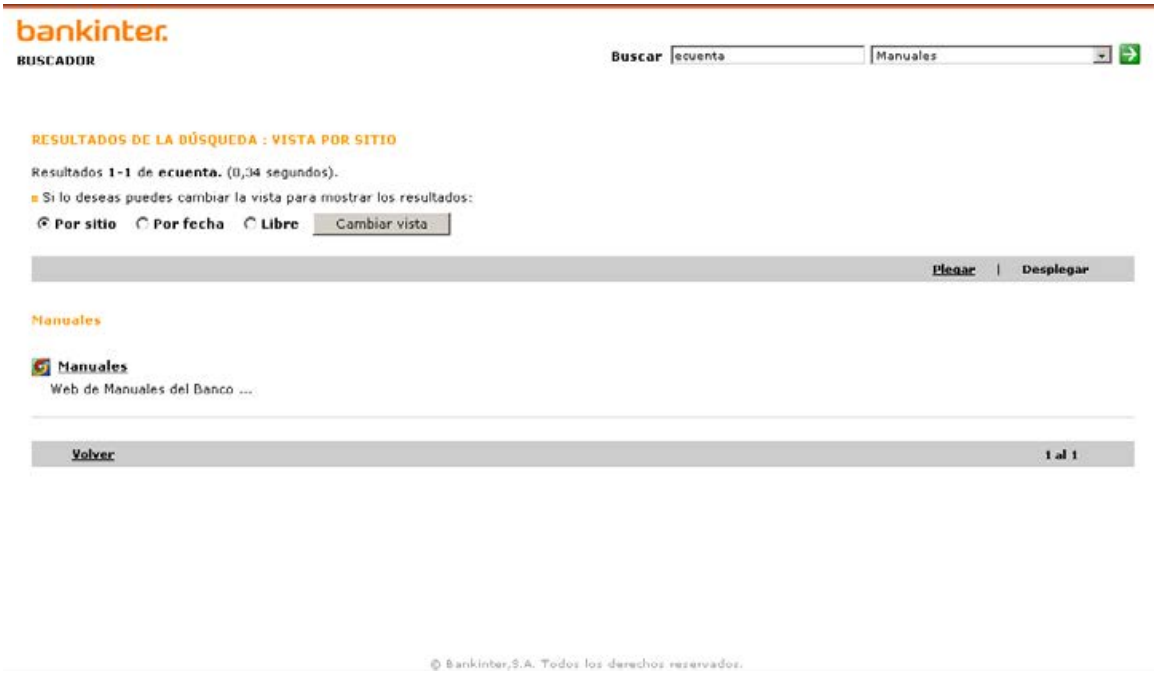
Bankinter's intranet search uses the search functionality of Microsoft SharePoint Portal Server 2003. The bank has personalized the tool, defining search fields for every organizational area so users can limit the searches according to their requirements. Search appears as a single text box in the header; a multiple selection box allows the user to limit the search to a specific intranet site.

The intranet team has also integrated the Lotus Notes content, customized the look and feel of the search tool, and adapted it to meet the usability criteria outlined in the company's *Style Guide*.

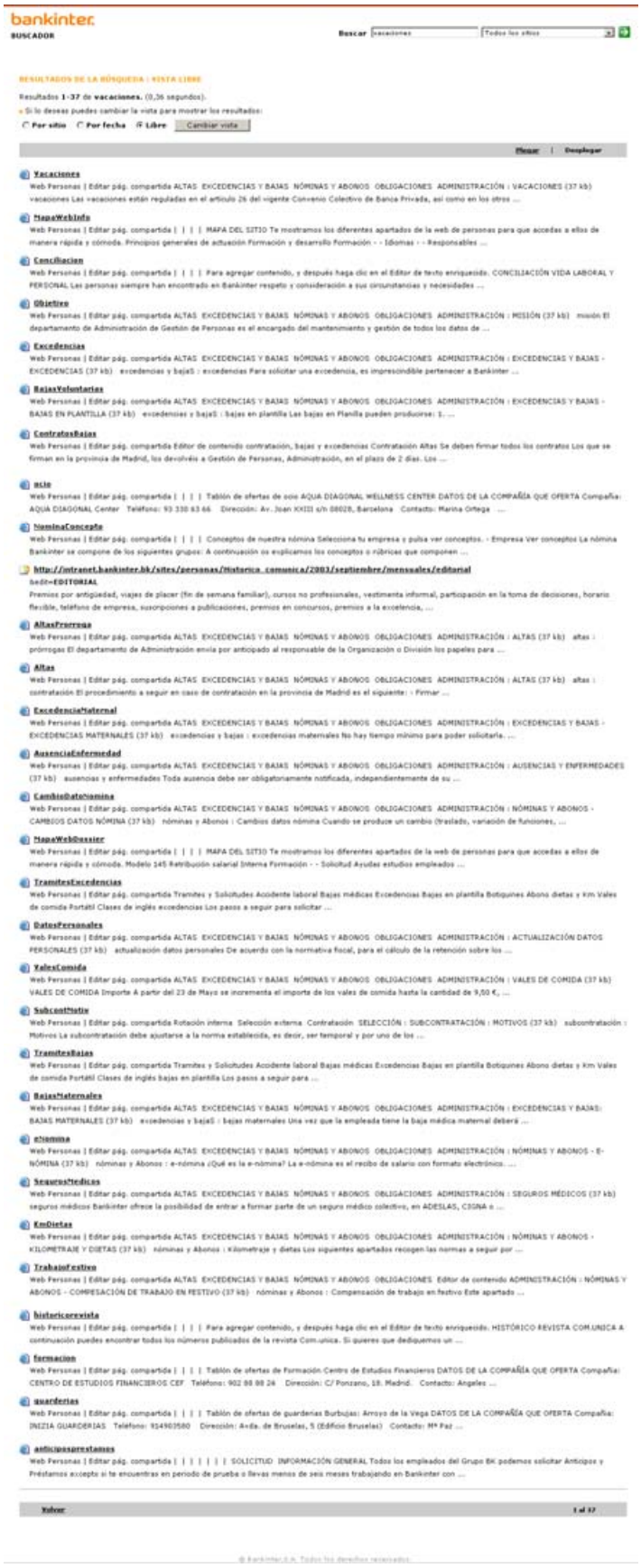
There are three views for the search results: grouped by site or date, or ungrouped.


bankinter.
BUSCADOR
Buscar oficinas bankinter
Todos los sitios
RESULTADOS DE LA BÚSQUEDA : VISTA POR FECHA
Resultados 1-41 de oficinas bankinter. (0,42 segundos).
Si lo deseas puedes cambiar la vista para mostrar los resultados:
Por sitio
Por fecha
Libre
Cambiar vista
Plegar | Desplegar
Ayer
Oficinas de Bankinter
Lista con todas las oficinas de Bankinter ...
Plegar | Desplegar
Última semana
Oficina de Gestión
Oficina de Gestión ...
Plegar | Desplegar
Último mes
Cambios en el modelo de numeración de las oficinas comerciales
Documento creado por: Comunicaciones Voz - Gestión de Sistemas Fecha: 22 ago 07 Versión: 1.1 ■ Introducción Se hace necesario un cambio en la numeración de VoIP de las oficinas comerciales, para afrontar la incorporación de las nuevas oficinas de clave 1xxx. Se pretende así evitar ...
Plegar | Desplegar
Principios de este año
Migración oficinas a VoIP
Migración oficinas universales a VoIP Tres Cantos, 22 enero 2007 (Arquitectura antes de la migración Ejemplo: 0216 Madrid Ag X (*) Para Madrid o Barcelona, el número de pymes entra en la Meridian correspondiente de Banca Telefónica, y luego ésta desvía la llamada a un número fijo de ...
Procedimiento migración oficinas universales a VoIP
Versión para Bankinter Tres Cantos, 2 abril 2007 (Arquitectura de una oficina comercial antes de la migración Ejemplo: 0216 Madrid Ag X (*) Para Madrid o Barcelona, el número de pymes entra en la Meridian ...
Plegar | Desplegar
Último año
MANTENIMIENTO INTEGRAL DE LA TELEFONIA DE LAS OFICINAS
Mantenimiento integral de la telefonía de las oficinas. Puntos genéricos que debe contemplar el servicio. Noviembre 2004 (MANTENIMIENTO CORRECTIVO • Atención telefónica a los usuarios para incidencias y consultoría de usuarios sobre facilidades de la telefonía global de la oficina ...
Plegar | Desplegar
Otras
Ofic
Presentación Junio-Octubre 2005 Índice Personas Revisión presupuesto y previsión Control de gestión Proyecto de Indicadores de Desarrollo Resumen Gerencias Objetivos próximo trimestre Índice Personas Revisión presupuesto y previsión Control de gestión Proyecto de Indicadores de Desarrollo ...
Volver
1 al 41 Siguientes
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Pictured: Search results sorted by date. The query was for Bankinter branch locations.



Pictured: Search results for a bank product grouped by site.


bankinter
BUSCADOR
Buscar vacaciones
Todos los sitios
RESULTADOS DE LA BÚSQUEDA : VISTA LIBRE
Resultados 1-37 de vacaciones. (0,36 segundos).
Si lo deseas puedes cambiar la vista para mostrar los resultados:
Por sitio
Por fecha
Libre
Cambiar vista
Plegar | Desplegar
Vacaciones
Web Personas | Editar pág. compartida ALTAS EXCEDENCIAS Y BAJAS NÓMINAS Y ABONOS OBLIGACIONES ADMINISTRACIÓN : VACACIONES (37 kb)
vacaciones Las vacaciones están reguladas en el artículo 26 del vigente Convenio Colectivo de Banca Privada, así como en los otros ...
MapaWebInfo
Web Personas | Editar pág. compartida | | | | MAPA DEL SITIO Te mostramos los diferentes apartados de la web de personas para que accedas a ellos de manera rápida y cómoda. Principios generales de actuación Formación y desarrollo Formación - - Idiomas - - Responsables ...
Conciliacion
Web Personas | Editar pág. compartida | | | | Para agregar contenido, y después haga clic en el Editor de texto enriquecido. CONCILIACIÓN VIDA LABORAL Y PERSONAL Las personas siempre han encontrado en Bankinter respeto y consideración a sus circunstancias y necesidades ...
Objetivo
Web Personas | Editar pág. compartida ALTAS EXCEDENCIAS Y BAJAS NÓMINAS Y ABONOS OBLIGACIONES ADMINISTRACIÓN : MISIÓN (37 kb) misión El departamento de Administración de Gestión de Personas es el encargado del mantenimiento y gestión de todos los datos de ...
Excedencias
Web Personas | Editar pág. compartida ALTAS EXCEDENCIAS Y BAJAS NÓMINAS Y ABONOS OBLIGACIONES ADMINISTRACIÓN : EXCEDENCIAS Y BAJAS - EXCEDENCIAS (37 kb) excedencias y bajaS : excedencias Para solicitar una excedencia, es imprescindible pertenecer a Bankinter ...
BajasVoluntarias
Web Personas | Editar pág. compartida ALTAS EXCEDENCIAS Y BAJAS NÓMINAS Y ABONOS OBLIGACIONES ADMINISTRACIÓN : EXCEDENCIAS Y BAJAS - BAJAS EN PLANTILLA (37 kb) excedencias y bajaS : bajas en plantilla Las bajas en Plantilla pueden producirse: 1. ...
ContratosBajas
Web Personas | Editar pág. compartida Editor de contenido contratación, bajas y excedencias Contratación Altas Se deben firmar todos los contratos Los que se firman en la provincia de Madrid, los devolvéis a Gestión de Personas, Administración, en el plazo de 2 días. Los ...
aclo
Web Personas | Editar pág. compartida | | | | Tablón de ofertas de ocio AQUA DIAGONAL WELLNESS CENTER DATOS DE LA COMPAÑÍA QUE OFERTA Compañía: AQUA DIAGONAL Center Teléfono: 93 330 63 66 Dirección: Av. Joan XXIII s/n 08028, Barcelona Contacto: Marina Ortega ...
NominaConcepto
Web Personas | Editar pág. compartida | | | | Conceptos de nuestra nómina Selecciona tu empresa y pulsa ver conceptos. - Empresa Ver conceptos La nómina Bankinter se compone de los siguientes grupos: A continuación os explicamos los conceptos o rúbricas que componen ...
http://intranet.bankinter.bk/sites/personas/Historica_comunica/2003/septiembre/mensuales/editorial
bedit=EDITORIAL
Premios por antigüedad, viajes de placer (fin de semana familiar), cursos no profesionales, vestimenta informal, participación en la toma de decisiones, horario flexible, teléfono de empresa, suscripciones a publicaciones, premios en concursos, premios a la excelencia, ...
AltasProrroga
Web Personas | Editar pág. compartida ALTAS EXCEDENCIAS Y BAJAS NÓMINAS Y ABONOS OBLIGACIONES ADMINISTRACIÓN : ALTAS (37 kb) altas : prórrogas El departamento de Administración envía por anticipado al responsable de la Organización o División los papeles para ...
Altas
Web Personas | Editar pág. compartida ALTAS EXCEDENCIAS Y BAJAS NÓMINAS Y ABONOS OBLIGACIONES ADMINISTRACIÓN : ALTAS (37 kb) altas : contratación El procedimiento a seguir en caso de contratación en la provincia de Madrid es el siguiente: : Firmar ...
ExcedenciaMaternal
Web Personas | Editar pág. compartida ALTAS EXCEDENCIAS Y BAJAS NÓMINAS Y ABONOS OBLIGACIONES ADMINISTRACIÓN : EXCEDENCIAS Y BAJAS - EXCEDENCIAS MATERNALES (37 kb) excedencias y bajas : excedencias maternales No hay tiempo mínimo para poder solicitarla. ...
AusenciaEnfermedad
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CambioDatosNomina
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Volver
1 al 37

Pictured: Ungrouped search results for bank holidays.DESIGN PROCESS AND

USABILITY ACTIVITIES

Bankinter's intranet team often uses surveys to solicit user feedback and generate ideas. For the redesign, the team also employed card sorting and heuristic evaluation methods and studied the server logs.

The team does three main types of user testing:

1. Structure test. When team members are launching a new site or adding new content to an existing one, they use the structure test to see if users agree with the logic of the proposed structure.

An example structure test consisted of 19 users tested over two days.

Users: Branch directors, sales staff, and telephone banking staff

Goal: To test a defined structure for the Web

Proposed first-level categories:

CLIENT DATA | **AGENDA** | **SAVING** | **FINANCE** | **SERVICES** | **PRICES**

Task 1: Organize the file content. Participants distributed the content among the six files.

Task 2: Participate in a group discussion about Task 1. Questions included: Was it difficult to identify the categories? Are you unsure about any specific category? Is the file order appropriate? What do you expect to find under each file?

Task 3: Describe the site structure using a single adjective.

General results: Users viewed the new structure as logical—that is, it was intuitive, clear, and complete.

Suggestions from users:

- Create a tab for all product simulators
- Include a tool to compare products from other banks
- Have all the basic client data always visible in the screen

2. Design test. Team members use this test when they want to ensure that the proposed change to the visual design will be well received by users. They first present mockups to a group to identify the designs' strengths and weaknesses. Depending on what they're testing, team members identify representative samples of users based on age, technology savvy, seniority, current job, and background.

For example, in August 2005, the team ran a mockup test of the homepage. In the test sessions, users:

- didn't notice the Bankinter stock
- asked for graphical representation of information
- gave the *Who can help me?* high priority
- wanted the *Work Part* box link to be first

- preferred a horizontal news layout

3. Usability test. Team members watch users perform tasks on the site and thereby identify issues that need to be solved. When possible, they conduct these tests iteratively, making changes in between rounds of testing.

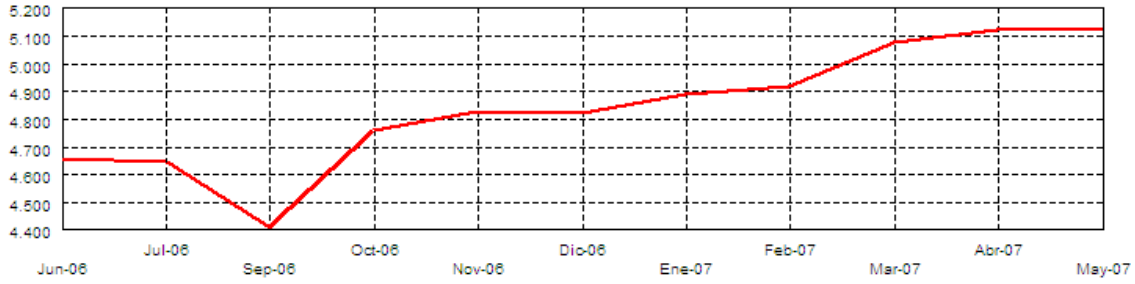
In addition to these three testing methods, the team uses Web surveys and interviews with end users. When planning new site components, for example, the team:

- Asks the for an initial definition of the component from the organizational area that needs the new content
- Identifies the users (specific role, area, or department)
- Identifies the problem to be solved or the process to be improved—that is, what is the goal?
- Are we creating something completely new, or are the users already working with another interface?
- Are there any lessons learned from previous, similar developments?

RESULTS

As the following graphics demonstrate, the intranet has shown a significant increase in the number of users who accessed the site each month.

Number of visitors and % of visitors[1] that accessed the intranet each month:



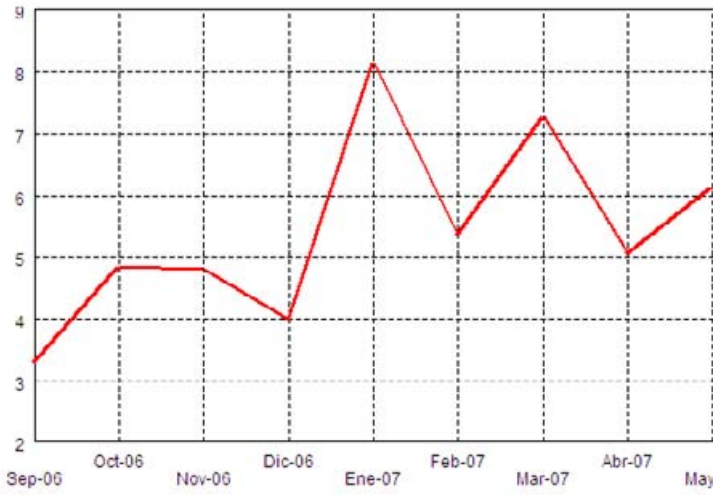
Jun-06	Jul-06	Sep-06	Oct-06	Nov-06	Dic-06	Ene-07	Feb-07	Mar-07	Abr-07	May-07
4.651	4.642	4.404	4.755	4.824	4.815	4.884	4.911	5.075	5.120	5.124

Jun-06	Jul-06	Sep-06	Oct-06	Nov-06	Dic-06	Ene-07	Feb-07	Mar-07	Abr-07	May-07
112,48	112,26	106,50	114,99	116,66	116,44	118,11	118,76	122,73	123,82	123,91

(1) % of visitors is more than 100% because of the number of external staff who are granted access to the intranet.

The following chart shows how the number of intranet sites has increased continuously since the intranet's inception. Page views have increased accordingly. The Bankinter intranet contains more than 40 principal sites, plus numerous subsites and projects sites. As more bank areas become interested in being part of the intranet, employees gain more access to subjects they're interested in.

Millions of pages visited:



LESSONS LEARNED

Lessons learned from Francisco Vicente García Ramos:

The site must evolve to become useful. "There is no beginning or end to the intranet. It must be a permanent evolution."

Listen to the users. "Always take their opinions into account."

Support and encourage content managers. "Support the content managers and they will do a great job."

Coldwell Banker Real Estate Corporation

Using the intranet:
Coldwell Banker Real Estate Corporation, a subsidiary of Realogy Corporation (NYSE: H), has been a premier provider of full-service real estate services for over 100 years. Around the globe, it has more than 3,800 independently owned and operated residential and commercial real estate offices, staffed with over 126,000 sales associates.

Headquarters: Parsippany, New Jersey (US)

Number of employees the intranet supports: 126,000

Sales Office Locations: Coldwell Banker has franchises and/or company-owned stores in all 50 states, as well as in 32 countries and territories including: Aruba, Australia, Bahamas, Bahrain, Belize, Bermuda, Canada, Cayman Islands, Costa Rica, Dominican Republic, El Salvador, France, Indonesia, Ireland, Israel, Jamaica, Jordan, Lebanon, Mexico, Netherlands, Nicaragua, Panama, Puerto Rico, Saudi Arabia, Singapore, Spain, St. Kitts & Nevis, St Martin/St. Maarten, Turks & Caicos, United Arab Emirates, Venezuela, and the Virgin Islands (British and US)

Sales (2006): US$301.7 billion in closed sales volume across 4,000+ franchise offices

Design team:
In-house, by three staff members, supported by the following agencies: Kinesis Marketing (strategy, creative development, and program management support); Modus Associates (design and usability expertise); and Bootstrap Software (technical development and implementation)

Members:

Coldwell Banker: Helen Galasso, VP Interactive Marketing; Sandy Sklareski, Director Franchise Marketing; Jocelyne Issa, Manager Franchise Marketing; Lisa Madden, Senior Manager, Interactive Marketing

Kinesis Marketing (www.kinesismarketing.com): Gordon Miller, Creative Lead; Jo Stapleton, Strategy and Program Management; Larry Latore, Designer; Jason Kirwin, Content Migration

Modus Associates (www.modusassociates.com): Scott McDonald, Strategist; Kristen Kulenych, Customer Experience Lead; Sara Hohn, Customer Experience Strategist; Nicole Cadoret, Design Lead

Bootstrap Software (www.bootsoft.com): David Bottomley, Project Manager; Zoe Holtzman, Assistant Project Manager; Jay Erickson, Business Analyst; Kristina Vogel-An, QA Manager; Jessica Ong, QA Lead; Andy Laird, QA Analyst; Leonid Brodsky, QA Developer; Jon Tinnirello, DBA; Paul Batchis, Tech Lead; Mark Udit, Senior Developer; Jef Guarente, Senior Developer; Dhanya Madhu, Junior Developer; Jeff Chew, Interface Developer

SUMMARY

Coldwell Banker's intranet designers weren't looking for bells and whistles or fluff when designing this intranet. Instead, they took a practical approach to design, precisely adhering to what they know to be their users' needs. And, in the process of meeting those needs, created an elegant design that even included a few artful bells and whistles.

The welcoming homepage is neither too crowded nor sparse. News, announcements, and events take the Lion's share of the main content area, informing employees of happenings throughout the organization.

The peach banner promotes seminars and links to more information to help agents improve their skills and, ultimately, to sell more.

The left-hand margin shows users their work, active listings, sales targets, and graphs to help them get a snapshot of the information. They can choose different categories and see charts for that information as well. Below this, users have links to more personal selections, which are based on their job and profile, such as *My Local MLS* and *Custom Marketing Center.*

The upper-left utility navigation—*Home, News & Announcements, Events, My Account, Site Feedback, Help,* and *Logout*—is visible, but also subtly designed so it doesn't occupy too much space.

In the upper right (just where it should be), a simple open field is preceded by the word *Search* and followed by an arrow to invoke the search; this is an expected and well-designed user interface. Also, a link to *Advanced Search* appears just after the arrow to invoke that search. This is a fine feature to offer for more advanced users. Its presentation is also subtle, and because it follows the main search and is associated commands, the advanced feature is unlikely to waste other users' time or befuddle the less experienced.

Presenting the day's mortgage rates let brokers and sellers offer current figures to would-be buyers.

Surveys ask business-related questions that actually make employees think, while the questionnaire answers can help other agents. For example, one question asked was: *What has the most impact on your market?* The multiple choice answers were: *Mortgage Rates, New Construction, Area Job Gains/Losses,* and *Demographic Changes.*

To make the page easier to read, people can select the larger "A" icon near the *Set your preferred text size* prompt in the lower right. This is a nice feature since many people don't know how to change text size using the browser commands (and even those who do might simply forget to do so). Also, by offering this feature on the page, designers can better dictate the resulting look than if users increase text size through their browser function.

The designers focused on improving business performance, and while considering this, they derived the main navigation names and categories. They limited the main navigation to six simple choices. And, rather than trying to think of branded or catchy names for these menus, they used the terms associated with real tasks that support and reinforce the key activities that drive a real estate professional's business performance:

- *Get Listings*: content and programs that support the acquisition of new real estate listings
- *Sell Listings*: information that helps users sell their properties
- *Promote Myself*: tips on self-promotion in the user's community
- *Manage My Business*: tools that help users quickly understand and improve their business results
- The *Recruit & Retain*: job openings and how to apply, plus benefits to entice current employees to remain at the organization
- *Learn*: Coldwell Banker's abundant resources, programs, and incentives for employees, including those for professional development and personal enrichment



Pictured: The Coldwell Banker intranet homepage offers news, announcements, events, and a very task-oriented menu.

The *Get Listings* section also includes items such as presentations and training. This *Training and Education* menu links to content from the intranet's *Learn* section that focuses on getting listings. Users can access these offerings directly via the fly-out menu, or via the landing page, which has descriptions.



Pictured: The *Get Listings* menu offers choices that help agents acquire more real estate listings.



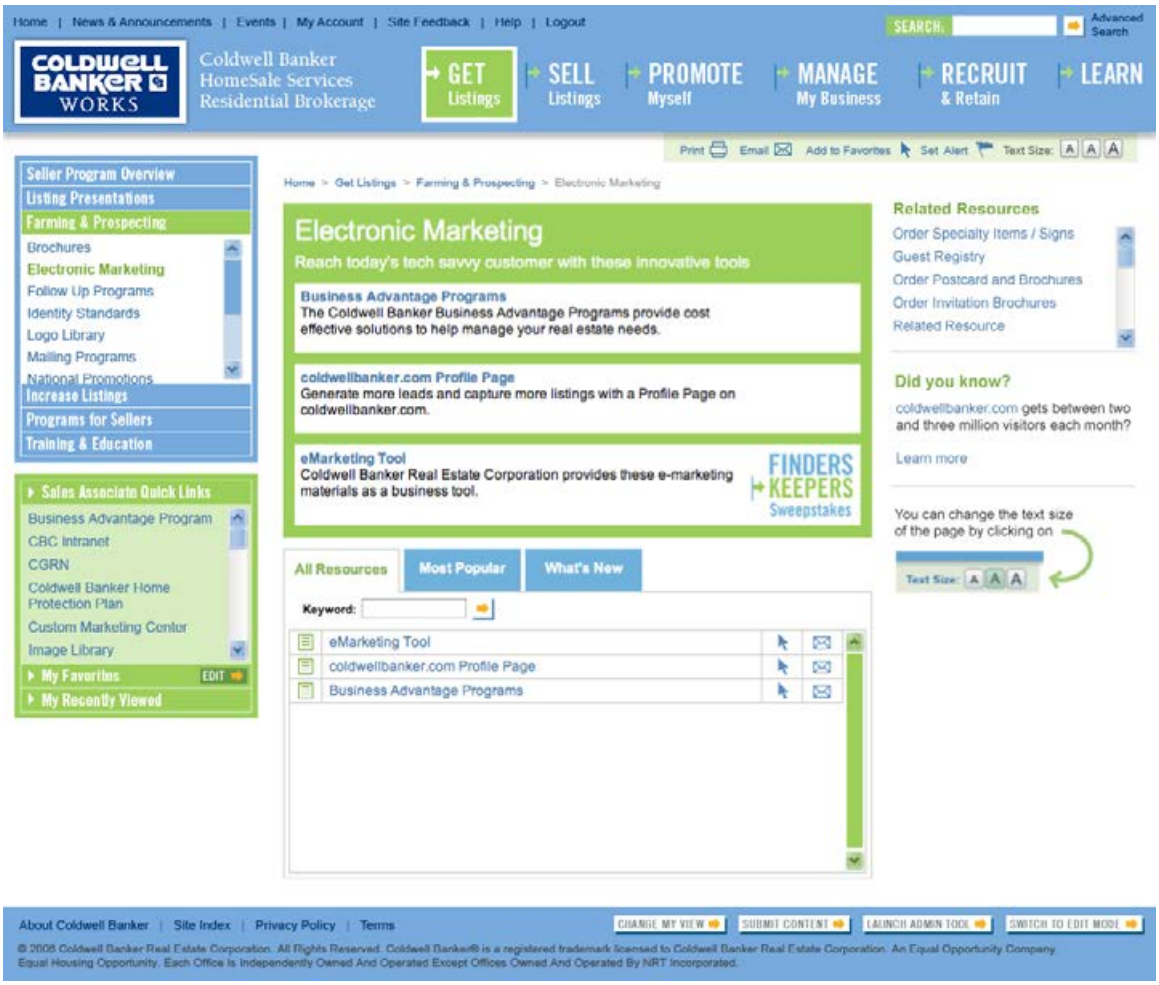
Pictured: The intranet's *Get Listings* section offers various choices to help agents acquire additional listings.

The *Farming & Prospecting* section offers helpful presentations and plans for agents to use to promote themselves, from TV to direct mailings. The section also discusses the corporate identity and how to best use the logo to maintain a consistent, high-credibility brand.



Pictured: The *Farming & Prospecting* section offers helpful presentations and plans for agent self-promotions, from TV to direct mailings.

The *Farming & Prospecting* section's *Electronic Marketing* subsection gives valuable tips for online messages and promotions.



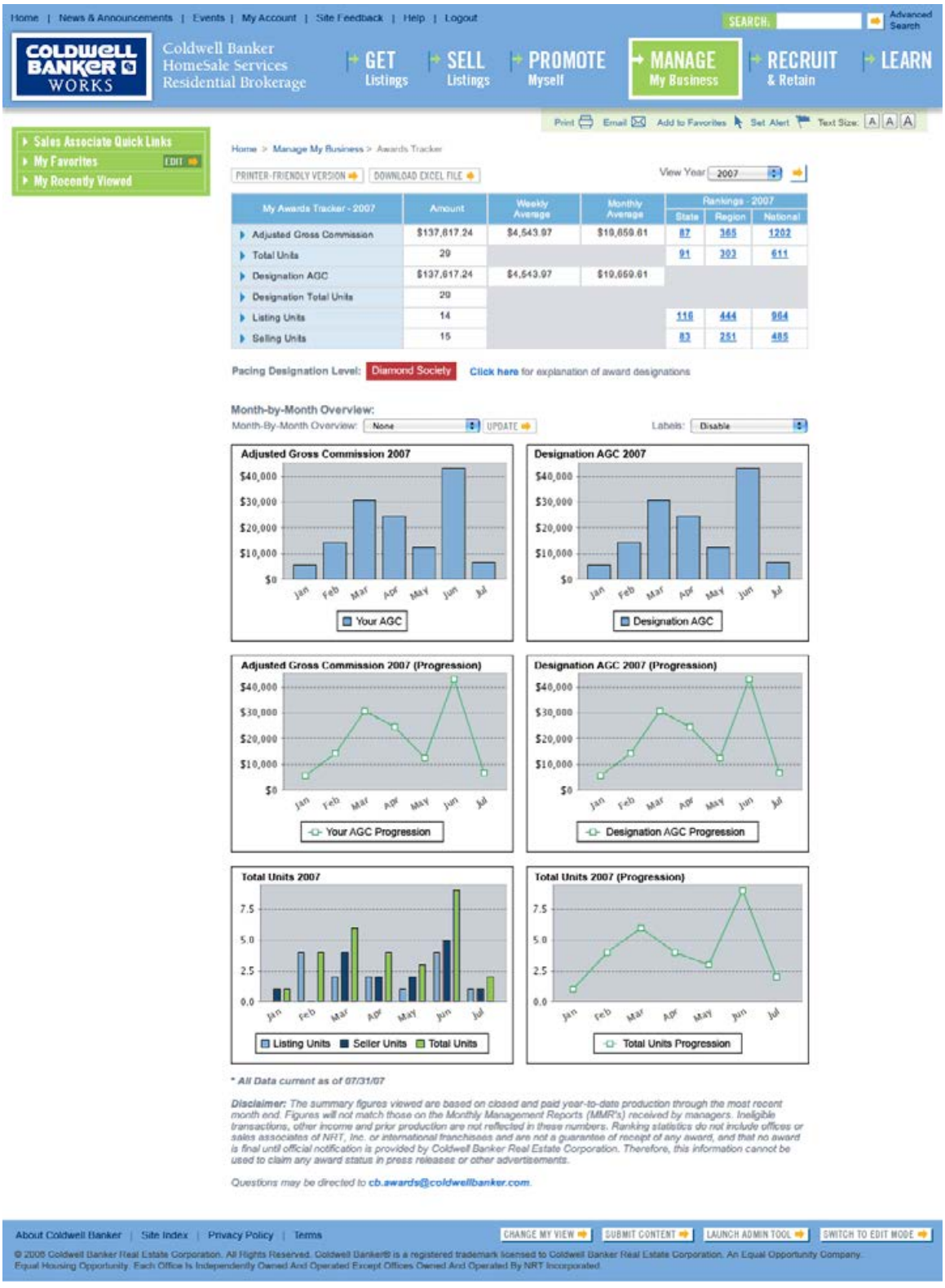
Pictured: The *Electronic Marketing* subsection offers valuable tips for online messages and promotions.

The *Manage My Business* section contains telling graphs and tables that let agents track their progress toward sales goals. The *Awards Tracker*, located center page, tracks the number of homes each agent has sold. The term "award" is used internally to denote a confirmed home sale. To instill gratification and healthy competition, the site compares these against both the employee's personal performance targets and local and national averages.



Pictured: The *Manage My Business* section contains telling graphs and tables about employee sales targets and status.

The *Awards Tracker* application offers even more elements to help agents meet their goals and stay abreast of their progress. Revealing charts offer views of sales associates' adjusted gross commission (AGC), progress toward award designations, number of units sold, and other personal performance indicators, all plotted over time. This can be extremely motivating to employees. *Awards Tracker* also tracks weekly and monthly earnings averages, and ranks an agent's performance within his or her office, region, and nation.

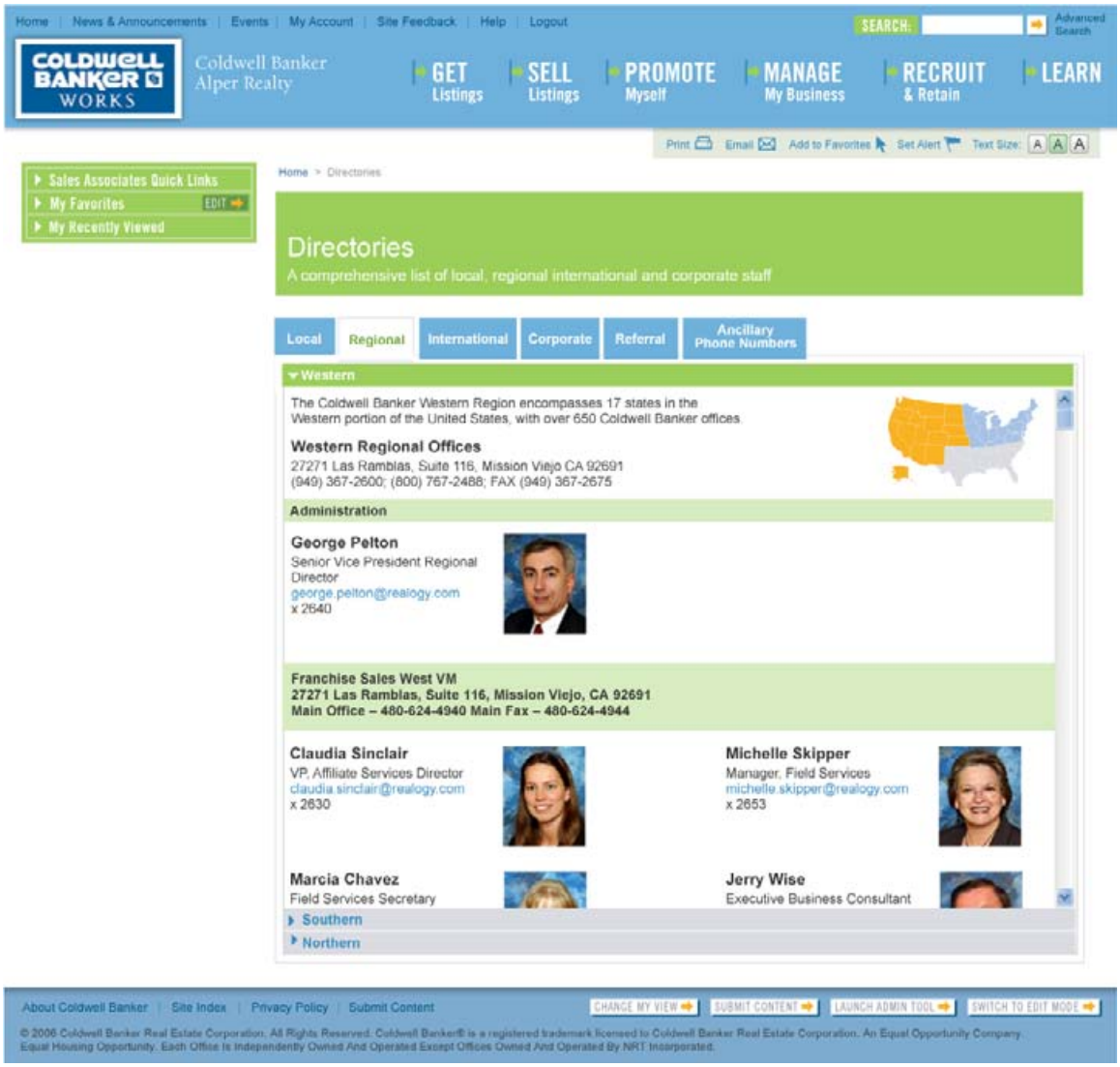


Pictured: The *Awards Tracker* application motivates sales associates to sell. Charts reveal adjusted gross commission and progress toward award designations, among other things.

To the right of the *Awards Tracker* application is the *My Tools* section, which contains business-related applications and websites. In addition to internal links, there are links to external websites such as the Multiple Listing Service (MLS) and ColdwellBanker.com.

The employee directory goes beyond the typical—users can see colleagues and their vital information, as directory entries include data such as name, title, email, and telephone extension, along with good quality photographs. Tabs for *Local, Regional, International, Corporate, Referral,* and *Ancillary Phone Numbers* cover the main categories and enable employees to find each other via geography (which makes sense in a real estate setting). Plus, users can search locally, regionally, and nationally for expertise and referrals. *Referral* is the main colleague search. It helps agents find colleagues in other offices for referral purposes. Designers chose these tabs and their names based on usability findings on how users think about seeking out colleagues.

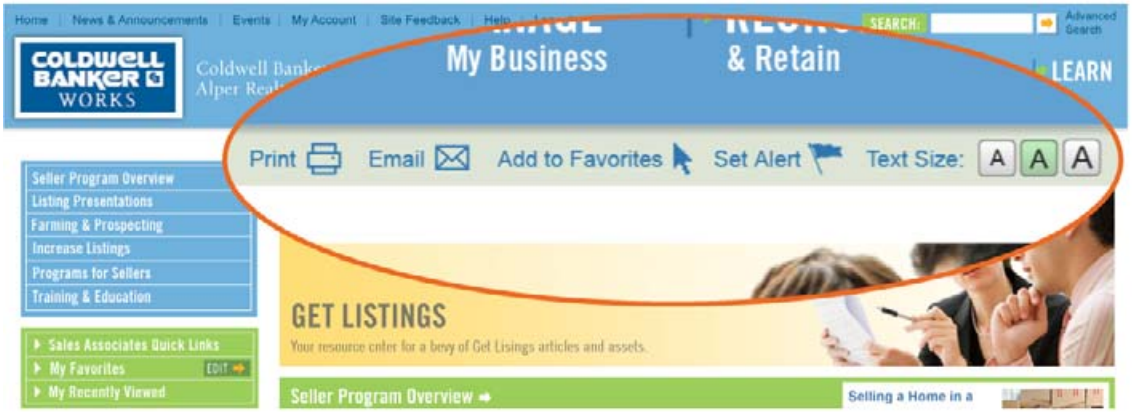
This directory helps to create a global community of practice at the organization.



Pictured: The *regional* tab in the Coldwell Banker intranet's employee directory. The top of the page displays a summary of the Western Region,

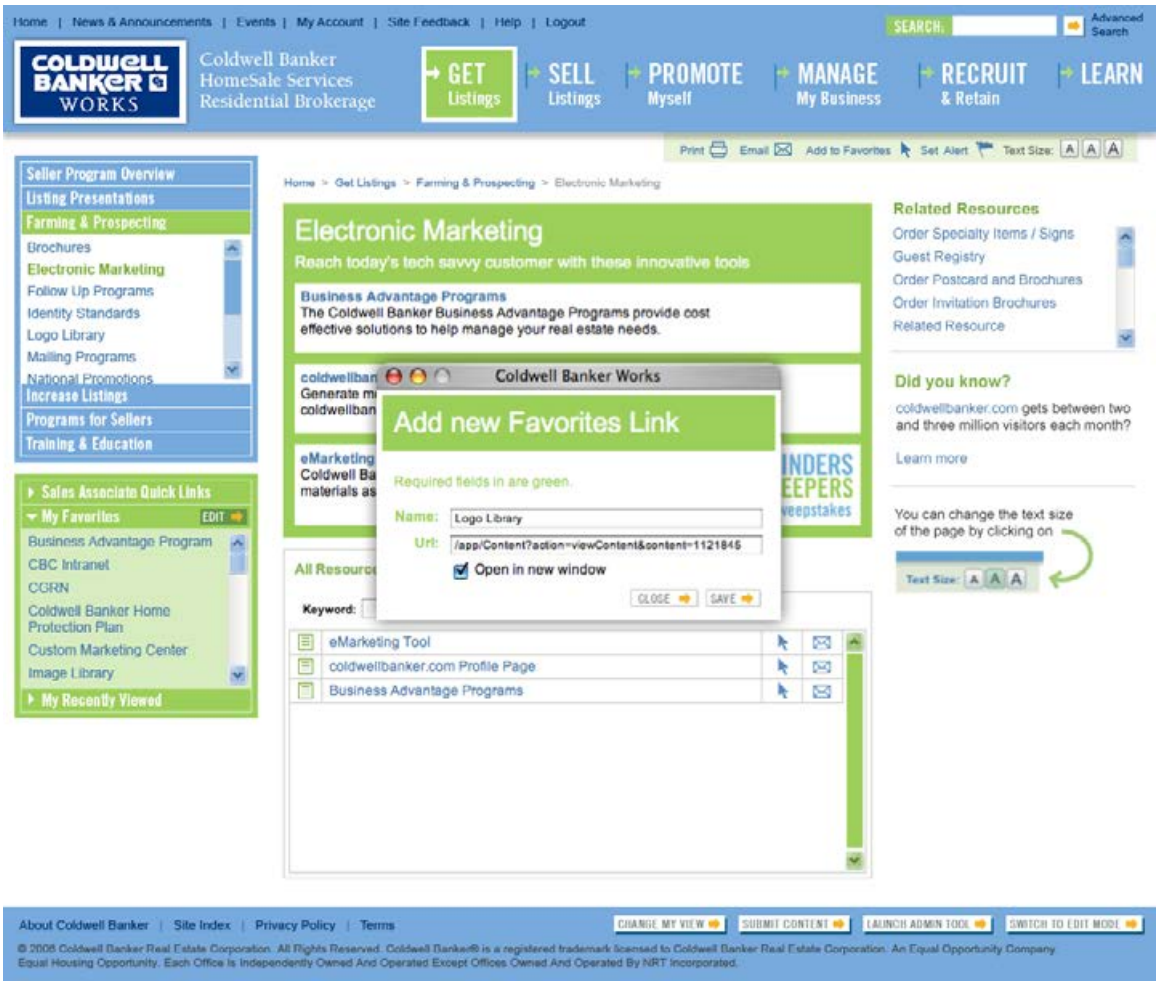
plus the main address and phone and fax numbers. A map on the top right highlights, in yellow, the states included in the regional category.

Letting users add favorites is always a nice feature. While users can add favorites at the browser level, letting them add them on the intranet is helpful for people who share PCs or travel. On this intranet, a toolbar in the upper right of all pages offers an *Add to Favorites* command. Clicking it starts the process of adding the current page to the user's *My Favorites* expandable window, which is accessed by clicking on a persistent page element (*My Favorites*). Alternatively, users can access the list by clicking the *Edit* button next to the *My Favorites* link.



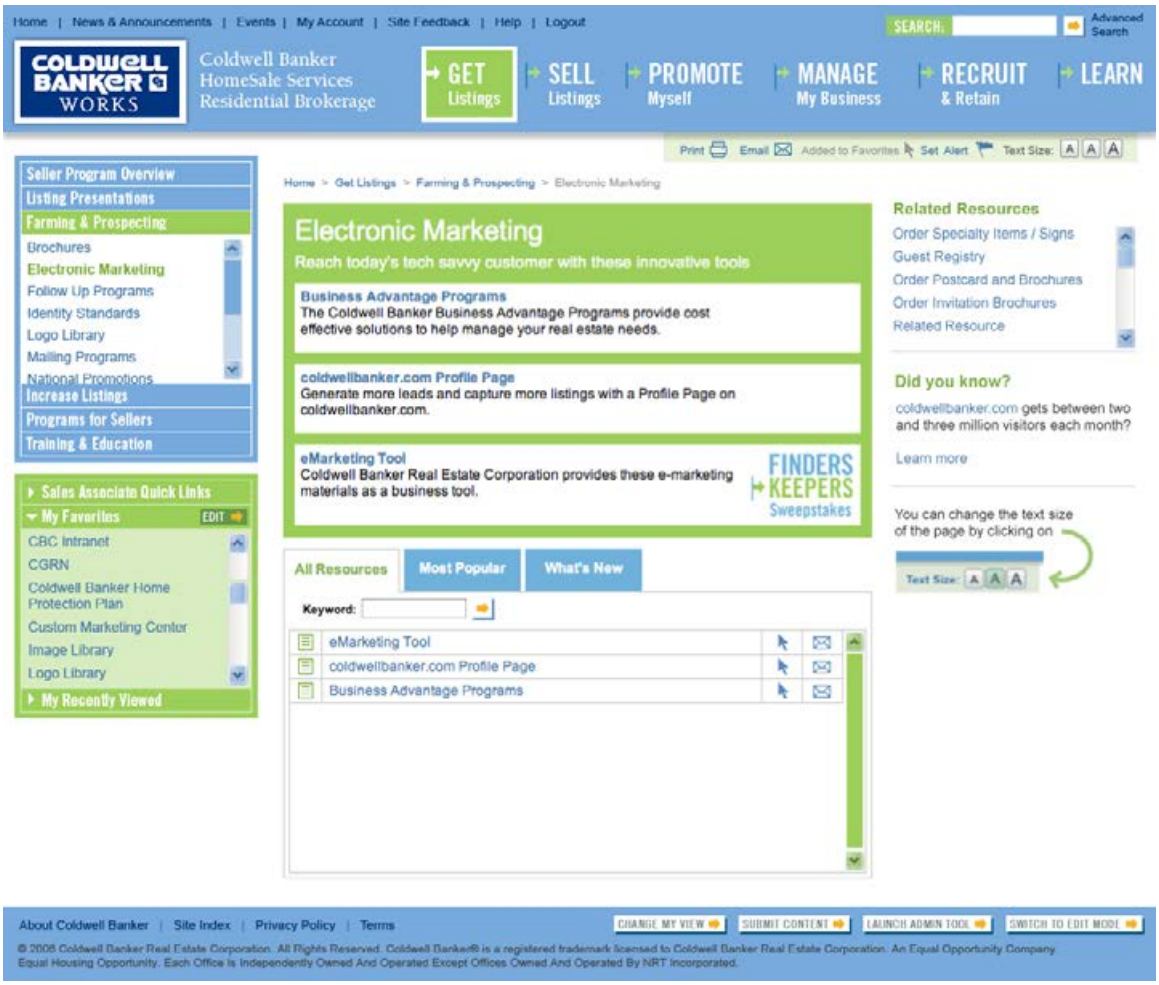
Pictured: The toolbar in the upper right (blown up here) offers the *Add to Favorites* command. This lets users add their current page to their favorites list, which is accessible through the *My Favorites* link on the right side of all pages.

Once users click the *Add to Favorites* link, a small pop-up appears that lets them name the favorite.



Pictured: Users can name the favorite, edit the URL, and select whether they want the favorite to open in a new window.

After clicking the *Save* button, users are presented with a brief confirmation in the same window, which then closes. Users remain on the same page after the favorite is added; they can then see the newly added favorite in that section on the page's left side.



Pictured: After adding a favorite, users remain on the page they were on when they decided to add it. The link to the new favorite—in this case, *Logo Library*—appears on the left.

The Coldwell Banker intranet enables the success of real estate agents and brokers, from every stage of their workday to every stage of their careers. The applications and task-based navigation demonstrate and verify how very user-focused the intranet team was when they designed this site.

URL AND ACCESS

The login page for Coldwell Banker Works is: www.coldwellbankerworks.com. Users are taken to their homepage with customized navigation, imagery, and data based on their permission level. Because Coldwell Banker is a franchise organization, they can't mandate that the site be bookmarked in the user's browser.

With a valid user name and password, the site is fully accessible from anywhere.

TECHNOLOGY

Whereas the company's former intranet, CBNet, utilized HTML and basic Flash, the new site takes full advantage of Web 2.0 technologies and services such as Ajax, Flash, RSS, Web services feeds.

The intranet runs with the following technologies:

- Oracle 10g database
- Java 1.5 for back-end programming
- JavaScript for front-end programming
- Hibernate 2 persistence engine, with home-grown data-access API
- Lucene 2 search engine, with home-grown search API
- Weblogic 10 Web container
- JSP for page rendering
- Apache 1.5 gateway Web server
- Red Hat Enterprise 4 operating system

"For hardware, we currently use a three-tier approach with dedicated servers at each layer," says Jay Erickson, Principal and Business Analyst, Bootstrap Software, the agency responsible for the site's technical development and implementation. "But we are in the process of moving to a virtual server environment for the top two layers. Oracle needs a dedicated machine. There's also a dedicated NFS for all our images and a dedicated server for the data warehouse. All the servers are Dells."

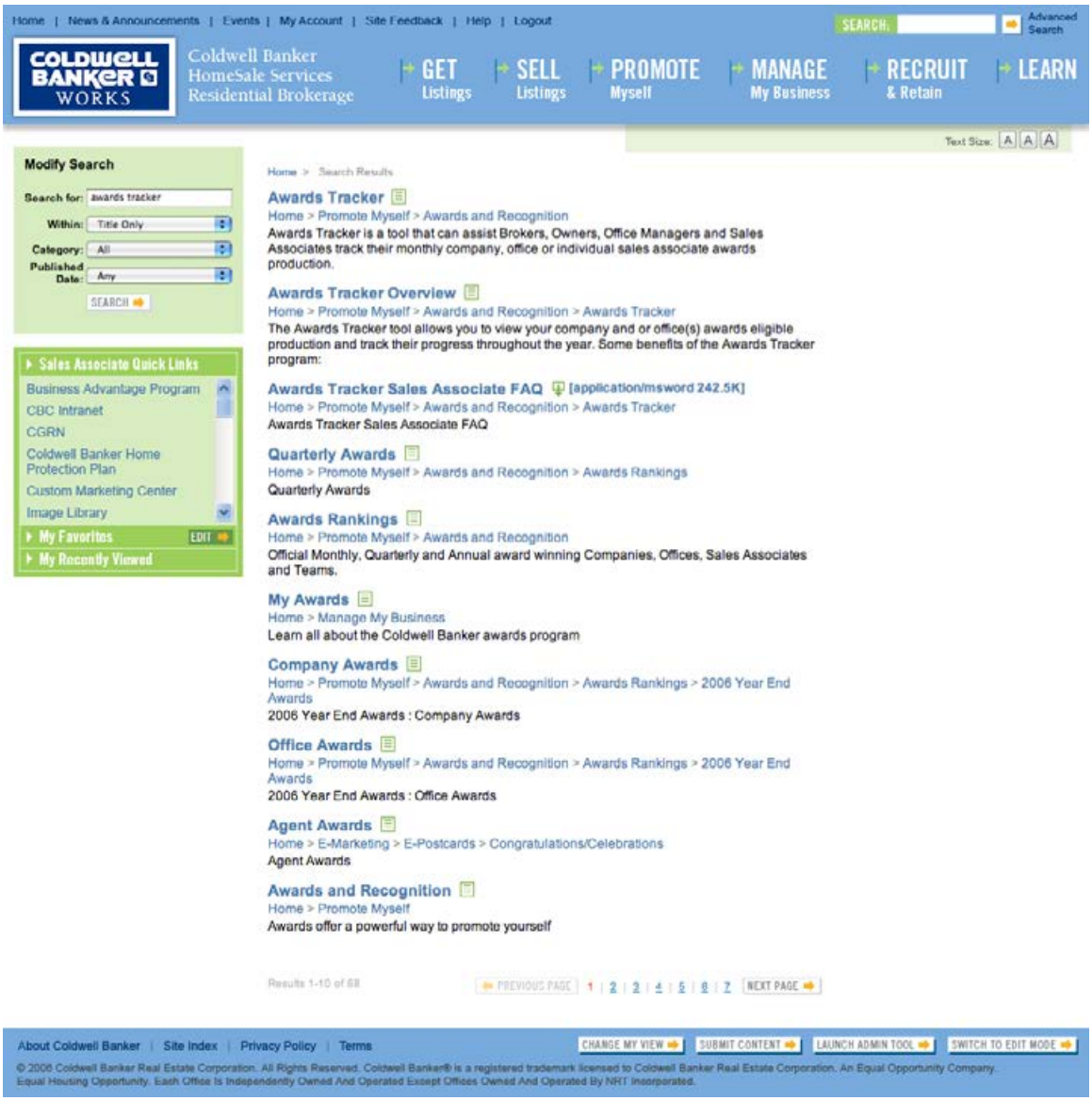
"For tracking bugs we use an open source application, Mantis, with a lot of our own modifications," he says. "We also have a very robust QA process that features: JUnit, Selenium, and HtmlUnit."

Search

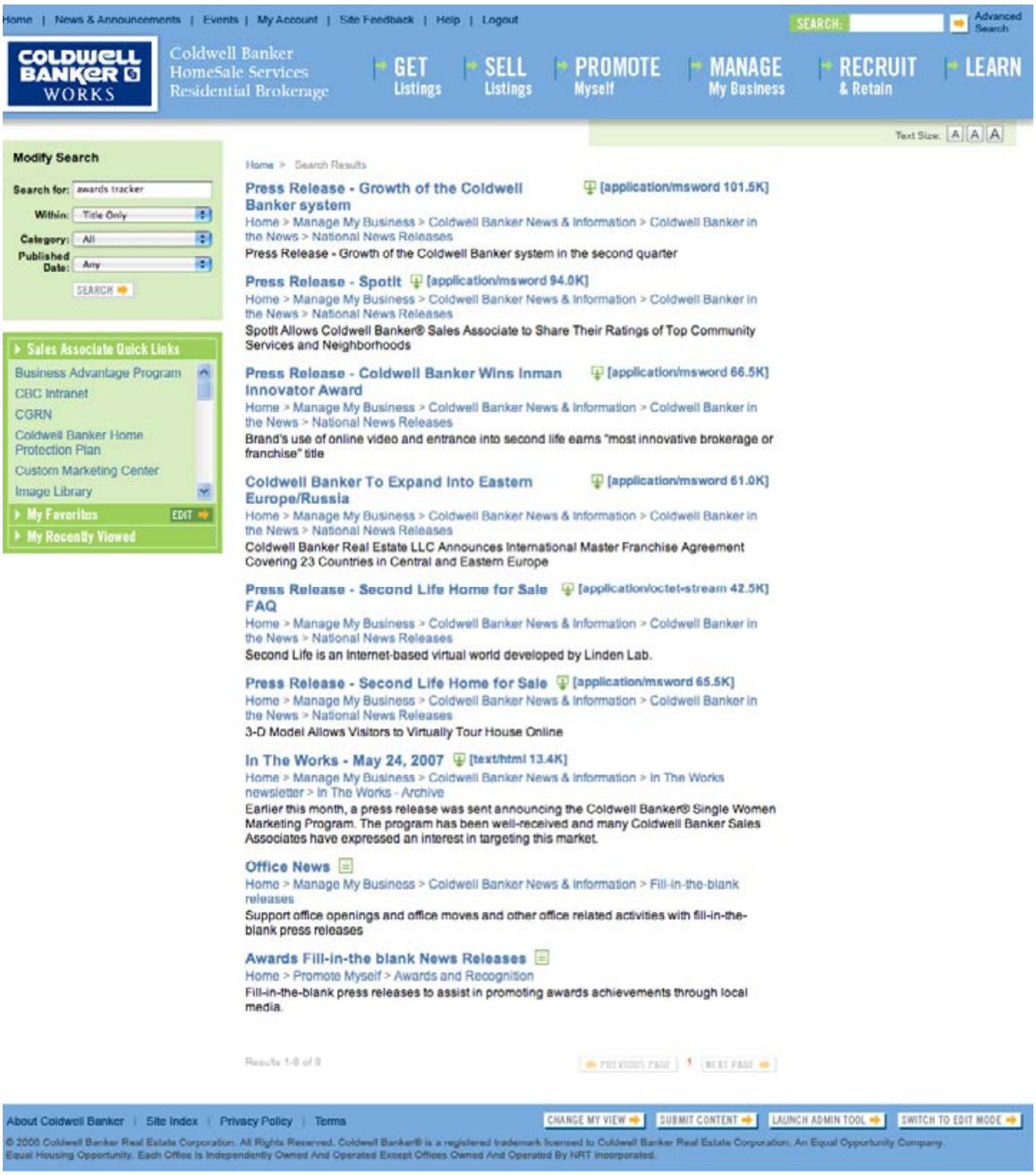
Like many of the site's applications, search was built from the ground up. "We have written a robust, thread-safe, and application-specific search API based on Lucene 2," says Erickson. "We wanted this to be a powerful engine and we wanted the flexibility to change the way it functions because it's expected to be an area of change and growth going forward."

They chose this solution because of the agency's experience with other high-traffic sites. "Furthermore, we need absolute control over the way it behaves," says Erickson, "because we expect the business rules that inform the search behavior to change over time."

Tracking searches is not yet in place. "CBWorks is still in its infancy," according Erickson, "but search tracking is an area where we expect to glean intelligence for development direction in the future."



Pictured: A search results page. The search was for "awards tracker," which is the application that displays performance data and graphs within the site's *Manage My Business* section.



Pictured: Search results page for the query “news.”

CONTENT MANAGEMENT

CMS Authors

Reflecting the nature of Coldwell Banker’s franchise model, content is managed on two levels: corporate and local. Local brokers have complete autonomy to publish whatever they want, but there is a hierarchy of permission levels (by job title) that governs contributions. There are also so-called “co-mingling” rules to blend-in corporate content in an effort to provide a seamless experience for each franchise in the user base.

Erickson explains the co-mingling rules: "Through the CMS, content can be added at both corporate (headquarters) staff and local (franchise or office) staff. The site is designed so that corporate and local content will appear together as 'resources,' and not as corporate or local resources per se."

Rules were built into the CMS to maintain a balance between the two types of content to ensure that neither will dominate the experience. Corporate administrators can tag important content to guarantee its accessibility, even when there is limited space.

"This compromise was seen as the best way to balance the need for a strong local experience with the need for critical corporate content and information to be exposed to the field," says Erickson.

Within the CMS, each type of content has a template that determines its data fields, appearance, and functionality. "We restrict where each template can appear," says Erickson, "in order to maintain control of the overall design and look and feel of the site." Site administrators also restrict permissions in some cases. Because consistency and quality are paramount to the brand image, only corporate administrators can post new images to the site.

The templates are completely defined in the database and only appropriate templates can be selected for use in any particular situation. Once selected, the template governs the nature of the content.

"From time to time, we rollout new templates based on feedback from the field," says, Erickson, "We maintain an audit trail of content edits. We also let users monitor any area, so they receive email notices when content of interest is updated."

Custom CMS Technology

Erickson calls Coldwell's CMS "pretty sophisticated" technologically. Bootstrap designed the CMS custom for Coldwell Banker. "The CMS is completely integrated into the Web application," he says, "and uses the site's database and search engine."

The content structure's organization drives the user experience and ability to dole out permissions appropriate to each and every brokerage and agent across the 150,000-person user base.

"There were two key drivers in designing the CMS," says Erickson, "It had to be intuitive and easy-to-use, because most of the people using it are business and real estate professionals, not technologists. Hence, we kept it simple, with plenty of inline help. It had to feel 'ownable' to users in the field (non-headquarters users), so they would be more likely to contribute content and also trust the content that was contributed by others. Ownability was achieved by creating a usable and localized experience throughout the site."

Attending to franchise office needs is in keeping with the overall strategy behind the intranet: to make it feel like a local intranet, not a corporate one. Because users had previously shown apathy or ambivalence toward corporate-mandated tools, the design team wanted to steer clear of this model for the new site.

The content is primarily organized by parent/child relationships, where any piece of content can have multiple parents (a directed graph structure). Content can also be "related" to other content anywhere in the content structure.

"These items then appear as 'related content' for users who are searching or browsing the site," says Erickson, "This allows contributors to designate relationships between content items that might be useful to other users."

Content is templated and the template defines the content's structure and functionality. Content can then be rolled out to the user community with a range of permission levels and a variety of business rules. These permissions determine security access and personalization details.

Coldwell's permission levels are based on the following characteristics:

- Corporate Office
- Local Office
    - Brokerage
        - Office(s)
- International Office
- User Types and Security Levels
    - Corporate User
    - Franchise Owner
    - Office Manager
    - Sales Associate

Customization of the CMS is continuing as the site grows, and plans are in place for specific features. "We're also about to rollout enhancements to allow third-party video content and dynamic image sizing and cropping," says Erickson.

INTRANET TEAM



Pictured: The Coldwell Banker and Kinesis Marketing Teams. Front row (from left): Jocelyne Issa, Coldwell Banker, Manager Franchise Marketing; Pam Holland, Kinesis, Program Management; Sandy Sklareski, Coldwell Banker,

Director Franchise Marketing; Lisa Madden, Coldwell Banker, Senior Manager, Interactive Marketing; Back row (from left): Jo Stapleton, Kinesis, Partner, Program Management; Gordon Miller, Kinesis, Partner, Creative Director; Larry Latore, Kinesis, Design; Helen Galasso, Coldwell Banker, VP Interactive Marketing.



Pictured: The Modus Associates and Bootstrap Software Teams. Front row (from left): Sara Hohn, Nicole Cadoret, Kristen Kulenych, and Scott McDonald, Modus Associates; Mark Udit, Leonid Brodsky, Jeff Chew, Kristina H. Vogel-An, and Dhanya Madhu, Bootstrap Software. Back row (from left): Jessica Ong, Zoe Holtzman, David Bottomley, Paul Batchis, Jeff Guarente, Jade Rothman, and Andy Laird, Bootstrap Software. Not pictured: Jay Erickson, Bootstrap Software.

Coldwell Banker Works is developed and maintained as a joint effort between two divisions of the Marketing Department: Interactive Development (for technical execution) and Franchise Marketing (for content management and communication).

The intranet team is comprised of three internal staff members and is augmented by agency staff when required. Lisa Madden, Coldwell Banker's Senior Manager, Interactive Marketing, explains the breakdown of staff roles and responsibilities for site management:

> **Director of Franchise Marketing:** responsible for the site's top-line strategy and direction, continuously providing value from the field perspective, which an agency could not provide.
>
> **Manager of Franchise Marketing:** responsible for the site's content management, as well as the communications regarding the new site prior to and after launch. The communication to the field is very important, especially in a franchise organization. This is a well-established function within the marketing department and it wouldn't make sense to outsource it solely for this project.

Project Manager: responsible for seeing that not only is the site launched in a timely manner, but all aspects of the business that are impacted by the launch are being managed appropriately. Such aspects include the communication campaign, education support materials from the Education Department, and products and tools that referenced the old site and need to be amended.

BACKGROUND

Helen Galasso, Coldwell's VP of interactive marketing tells the story of how the intranet evolved: "The Coldwell Banker Works intranet—formerly called CBNet—was launched five years ago as a static website allowing corporate headquarters to publish assets and information for use by local offices throughout the country. The site grew considerably over time to include over 6,000 pages and 20,000 content items. This rapid and largely ad hoc growth resulted in a site that users perceived as too dense, hard to use, headquarters-centric, and not relevant to their daily needs and work styles. This led to low adoption rates and low levels of trust, necessitating the need for this latest site redesign."

In 2006, the organization made a strategic decision to retool the site. The rebranded site, "Coldwell Banker Works" was intended to transform the intranet from merely a repository of information into an interactive work site, empowering users in their job functions. The company wanted to give site users business and productivity tools to help them achieve their daily and long-term objectives.

To develop the site they envisioned, the Coldwell Banker team looked to outside agencies to provide specific expertise and partnership. In this joint effort, the Coldwell Banker team provided strategic direction and project management, while looking to Kinesis Marketing for strategy, creative development, and program management support. Modus Associates provided design and usability expertise, and Bootstrap Software rounded out the team with technical development and implementation expertise.

"Specific expertise from our partners has provided us with a distinct competitive advantage in the strategy, design, functionality, and usability of our Web offerings," say Galasso.

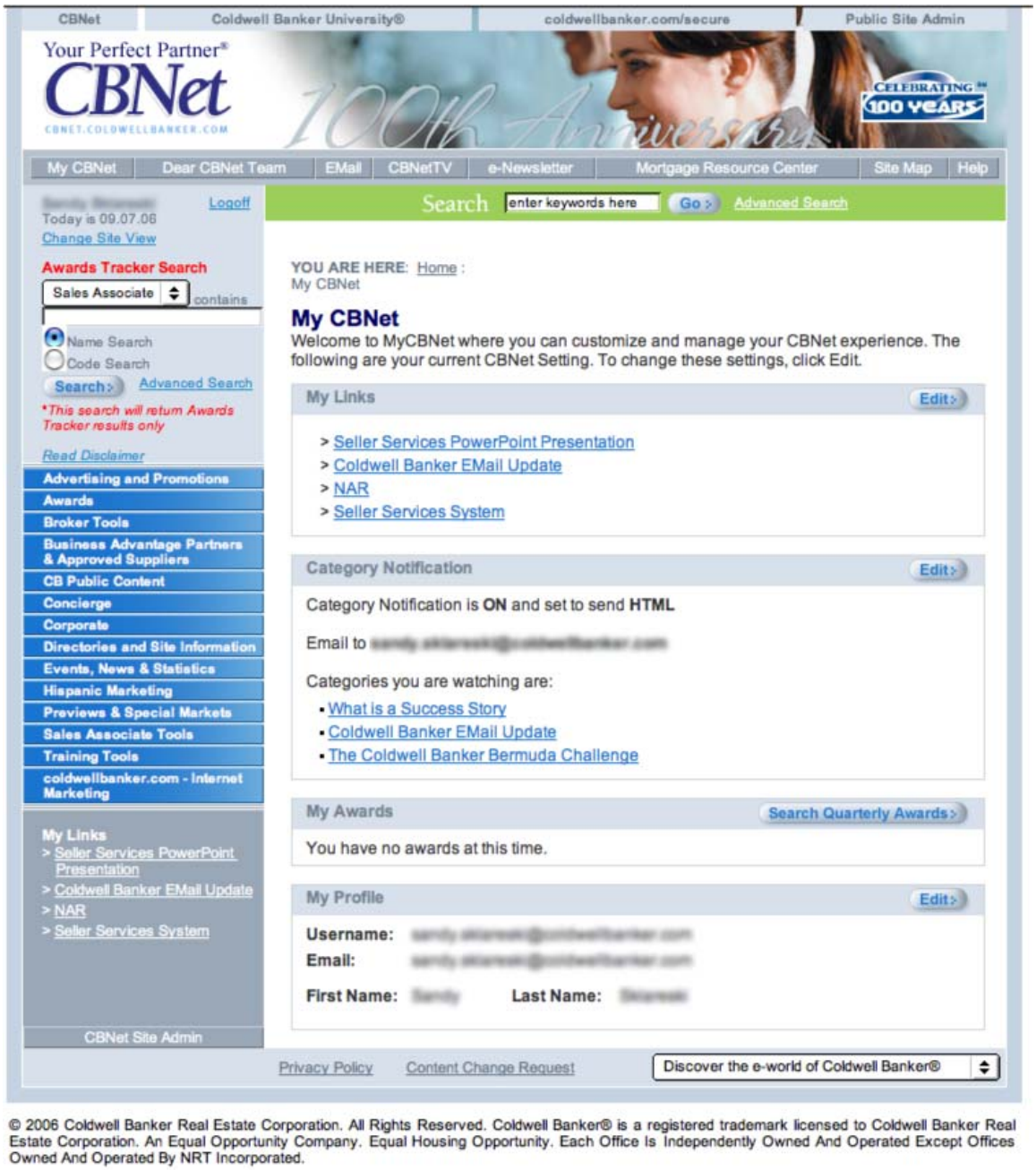
By fostering close client/agency relationships, the Coldwell Team has forged a cohesive group of disparate members all working toward the company's intranet goals.

"Our process and agency relationships are such that it was a collaborative process from the beginning," says Galasso. "With a productive and healthy exchange of ideas among several groups that brought their own expertise to bear on the project. We realized tremendous value in having the entire team active on the project throughout all phases, streamlining communication and enabling a more rapid and informed development process."

Gordon Miller, Kinesis Marketing's Creative Director, sums up the tenor of the working relationship between the various teams: "Credit for this site and its successes is due equally to the individual skills of some very talented people, and to the exceptional client/agency relationship that Helen Galasso, Barbara Salerno, and their people have fostered. Without that daily interaction, access, and trust, the site couldn't be what it is."



Pictured: The CBNet homepage. This site served as the organization's intranet prior to the launch of Coldwell Banker Works.



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Pictured: The CBNet site's personalization tool. This feature was no longer necessary in the new Coldwell Banker Works because pervasive personalization and customization make the entire site a *My CBNet*.

GOALS AND CONSTRAINTS

As a franchise business, the brand's primary goal is to create systems and best-in-class tools so valuable that they give franchisees a competitive advantage. The redesigned intranet had to deliver on that goal.

"The new Coldwell Banker Works is architected from top to bottom to educate, motivate, and facilitate the success of real estate agents and brokers at every stage

of their careers," says Scott McDonald, Modus Strategist, "making Coldwell Banker and its people the most formidable force in the real estate business."

For an organization such as Coldwell Banker, with its decentralized franchise structure, building the site to meet the stated goals is one challenge; finding an effective way to maintain it is another, perhaps more difficult, task.

"We have a vast and diverse audience with many needs and, in some cases, different business practices and definitions," says Madden. "And so our content management requirements are equally vast and under constant pressure to be refined, tagged, optimized, defined differently, etc."

The previous intranet accommodated 27 unique user types. This was a direct reflection of the pressure to accommodate the diversity of the site's audience (or at least address the *perception* of that diversity within the organization).

"This resulted in a very unwieldy experience," says McDonald. "For the redesign, we boiled this down to only three user types, which allowed us to design a vastly simplified content management experience."

A host of user experience issues also plagued the old CBNET site as a result of eight years of ad hoc growth with little strategic direction or planning. The redesign's central goal was to address the poor user experience that had developed over the years, leading to low adoption rates and high levels of mistrust and user frustration.

Other project goals include:

- Improve the navigation to provide better access
- Deliver a more relevant experience by providing personalized information for each user
- Provide cost savings and best-in-class tools to local franchises by making the platform customizable so that it can be easily adopted as an integrated local intranet
- (More effectively) leverage the company's considerable intellectual and human capital
- Improve user adoption by creating a more personalized, valuable, and efficient user experience
- Consolidate all corporate content and applications into a single, consistent, and intuitive interface
- Achieve greater brand quality and consistency (internally and externally)



Pictured: Simple top-level pages focus users on priority business activities and content. Relevant training and education resources appear as related content.

USERS

Coldwell Banker Works is an extranet used by the company's 3,800 franchise offices and 126,000 real estate agents located in all 50 US states and its international offices. System users are from the following groups:

Brokers: the company's franchise owners operate as independent business owners

Sales Associates: Real estate agents

Corporate Staff: Site administrators

USER TASKS

The new Coldwell Banker Works is a place where brokers and sales associates can perform the following tasks:

- Easily access the latest local and national industry news and events

- Find and download corporate brand assets, guidelines, and how-to's
- Track, manage, and improve their business performance
- Customize and order marketing materials and supplies
- Find and collaborate with colleagues and subject matter experts around the country
- Advance their professional knowledge and development
- Contribute, update, rate, comment on, print, or share site content
- Manage their user profile, set alerts and notifications, and customize their content display

BASIC INTRANET FEATURES

- National/local news and events
- Professional development resources
- Brand standards and assets
- Marketing and sales guidelines and templates
- Branded stationery, collateral, and merchandise fulfillment
- Personalization/customization
- Peer ratings and reviews of site content
- Business management and reporting tools
- Company staff directory
- Site-wide search
- Email alerts and notifications
- User account management
- Content management
- Internal marketing



Pictured: Related resources on content pages give users a complete picture, exposing them to content they might not otherwise see.

Collaboration Tools

Real estate is a highly mobile culture, with users spending little time in the office. As such, Coldwell Banker didn't invest in community or collaboration tools that would require a considerable time investment by users. The most robust collaboration tool on the new site is the employee directory and expertise-finder that allows sales associates and brokers to find peers across the country with specialized knowledge or expertise. This tool helps the company create value for its associates by providing a global community of practice. The new site also enables and encourages users to upload resources and best practices for use by their colleagues.

"One of the key innovations of Coldwell Banker Works," says McDonald, "Is that it appears to users as their local office intranet and not a corporate intranet. This was

done to make the site as relevant as possible to them, and to address their aversion to 'top-down' corporate resources and information."

"To achieve this, we branded the intranet based on the user's local franchise, prioritized local news and content, and created a highly-personalized site experience that includes prominent placement of their personal business information, including personal photo, award designations, performance statistics, property listings, business contacts, and favorite resources."

Data Visualization: The Killer App

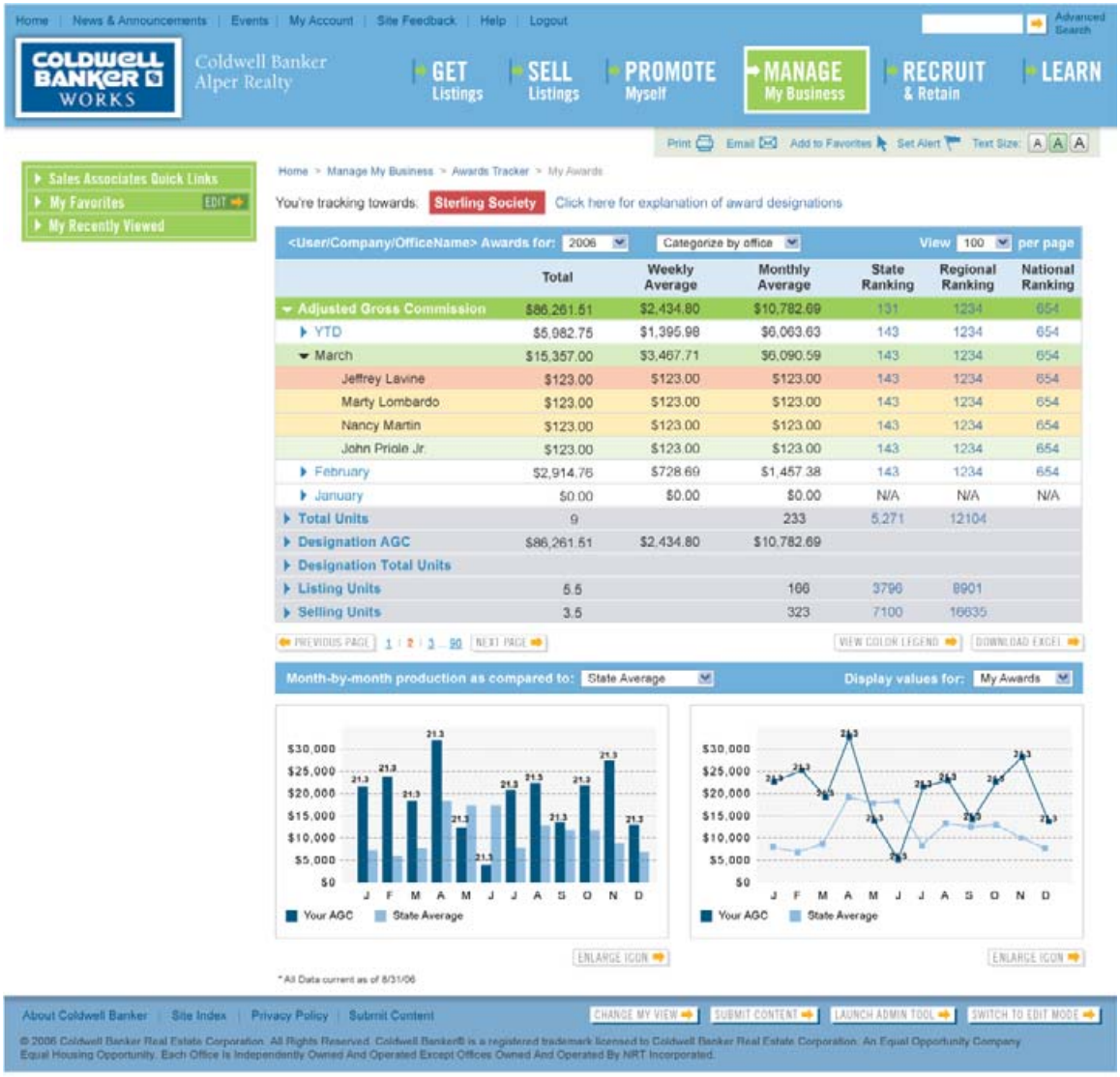
Coldwell Banker uses data visualization tools to engage the users and create a sense of competition among the franchisees. The site's "killer app" according to McDonald, is the site's *Manage My Business* section, where users see performance data in visually compelling ways in an effort to tap into the users' innate competitive nature.

This tool was designed to focus on performance by providing unique views of the data, such as comparisons with performance targets, benchmarks, and averages around the country. These pervasive and readily accessible performance insights were not previously available to Coldwell Banker's sales associates or brokers.

McDonald says these tools contribute to making the intranet an indispensable part of a user's daily workflow. "The culture of real estate is a highly competitive one," says McDonald. "Real estate professionals make money by selling properties, and they earn professional glory by selling more properties than their peers. By visualizing and making a game of this core dynamic that drives the business, we ensured that Coldwell Banker Works would become an indispensable part of users' daily workflow, and that users would then be more likely to see and use all of the other valuable assets that the intranet offers."

Despite the tool's valuable contribution to the overall site, it's still considered a work in progress. Budget, time, and organizational constraints kept them from fully realizing what they see as the tool's full potential. Prioritization decisions for this phase were very straightforward: because of the tight timeline for launch, the team could only utilize data and functionality that already existed.

"Our longer-term vision for this section is much more ambitious and it was clearly articulated in our creative deliverables for the intranet, which gives us a roadmap to evolve from," says McDonald. "We look forward to growing into this vision for a robust set of business measurement and management tools in the coming years,"



Pictured: A deeper view of the *Manage My Business* data visualization features. This section offers pie charts, graphs, and other engaging visualizations that help users quickly understand their performance in relation to a quota or to local, regional, and national averages.

DESIGN PROCESS AND USABILITY ACTIVITIES

Approach

Rather than spending time figuring out the specifics of what was wrong with the old site (just about everything, according to the team), they employed a "rip and replace" approach; choosing a wholesale redesign rather than an evolutionary set of changes.

In making design decisions, the team integrated two types of data into their decision-making: behavioral research methods applied to current users, and outside expert research.

Usability Methods

The team conducted behavior research with the assistance of Coldwell Banker's two agencies (Kinesis Marketing and Modus Associates) and involved engaging both end users and stakeholders. By meeting with users in the field and talking with them about their daily work habits and workflows, the team was able to glean insights that could easily be translated into actionable design choices.

Scott McDonald describes the team's usability methods as follows:

Field studies/user interviews: "We visited two local franchises to interview representatives of our two main user groups: brokers (franchisees) and sales associates. We asked them about their daily work habits and workflows. We asked them about their usage of the previous intranet, their frustrations and desires for it. We learned from users that, on the whole, they were very locally focused in their day-to-day activities, they distrusted corporate mandates and programs, and they found the legacy intranet site difficult to understand and use. We used this knowledge to develop a highly-localized, personalized, and simplified site experience that prioritized the content users valued most, while still exposing them to key corporate messaging and content."

Comments heard during user interviews:

> "Good content on the site, but I can't find it."
>
> "Once I find the content I need and leave the site, I have a hard time locating it next time."
>
> "The site is organized based on 'corporate' departments—very hard for us to understand."

Corporate stakeholder interviews: "Our interviews with corporate stakeholders helped us to understand the priorities and must-have business objectives of the new intranet. This gave us a complete view of where corporate and local goals diverged and overlapped, and helped us to reconcile them into a customer experience that served the interests of both well."

Insights from the stakeholders and user interviews:

- The majority of users visited the intranet about once per month, and very few made it a habit.
- Most users found the site difficult to use.
- Real estate professionals make money by being away from their desks, so the solution had to deliver value to users as time-efficiently as possible.
- The site and its content were seen as "top-down" and corporate-centric, whereas real estate professionals are independent-minded and focused on their local communities and offices. They felt alienated from and mistrustful of the intranet.

User feedback analysis: "The Coldwell Banker corporate intranet team had collected user feedback in an Excel spreadsheet over a period of time. The design team analyzed this feedback for patterns and commonalities, and used it in our design decision-making. What we learned was very similar to the findings from our user interview program."

Task analysis: "Utilizing the expertise of 12 representative users (from corporate and the field), we did an in-depth task analysis around the key business activities that users engage in every day. We used this information to design our new task-

based navigation, and to organize and prioritize the content within that new navigation scheme."

Content inventory: "As the legacy intranet evolved over time, no effort had been made to track or inventory the content of the site. Our inventory cataloged over 5,000 unique content items in an Excel spreadsheet. This volume was more than twice what Coldwell Banker thought we would find. The inventory was valuable in multiple ways during the design process, including that it:

- helped us organize and architect the new site;
- helped the client decide which content to keep, eliminate, or edit; and
- helped us to manage the migration of content from the legacy site to the new one."

Traffic data analysis: "We analyzed the traffic and search patterns of the legacy intranet, which showed the design team which topics were of greatest interest to users. This helped us to ensure that the right content was prioritized and easy-to-find. The traffic data was largely inconclusive because the site's usability was so poor. However, it did help us to understand which site areas and content were of most interest to users, and it provided us with a baseline by which to judge the success of our redesign."

Outside sources consulted for the redesign project:

- Nielsen Norman Group *Intranet Design Annual* (2005 and 2006)
- *Building Intranet Portals: Report from the Trenches* by the Nielsen Norman Group.
- Various Forrester research papers on usability and intranet design
- *Proven Portals* by Dan Sullivan (Addison Wesley)
- *The Human Side of Intranets* by Koehler, Dupper, Scaff, Reitberger, and Paxson (St. Lucie Press)
- *Information Dashboard Design* by Stephen Few (O'Reilly)
- *Intranets: Enterprise Strategies and Solutions* (a bi-monthly industry newsletter)
- *Improving Intranet Search* by Step Two Designs (2006)

TIMELINE

The redesign effort spanned 18 months from requirements gathering to launch. Below are some key milestones in the process:

- **October 2005:** Business requirement and strategy development
- **October—March 2006:** User surveying and research
- **April—December 2006:** Vision and user experience development
- **December—June 2007:** Technical development
- **June 2007—present:** Ongoing improvements and development

RESULTS

- Traffic has increased by 34% (as measured by successful logins)
- Some of the largest franchise companies have or are in the process of adopting coldwellbankerworks.com as their local intranet

What users can do now that they couldn't do before:

- Get an immediate snapshot of their business and its real-time status on the homepage
- Get one-click access to all functionality at their disposal (from their personal listing inventory to their coldwellbanker.com *Profile Page*)
- Get a best-in-class local intranet that they can easily edit and manage, without spending a dime on development

User feedback after the redesign:

> "I can finally understand the navigation!"
>
> "Not only is the (content) great, but the site works well and the design is clean and inviting."
>
> "For the first time in my career at corporate, I didn't get a complaint about a new product we launched at the conference."
>
> "I love it—the categories make so much more sense now."
>
> "I had no idea this stuff was here—now I'll use this site all the time!"

LESSONS LEARNED

Design team members share what they learned on the way to launching the new intranet.

Lessons learned from Scott McDonald:

> **Address complexity head-on.** "Be realistic with yourselves and with upper management. Intranet projects touch every facet of an organization and are inherently complex. There is a strong tendency to overlook this complexity at the beginning of a project and to not share difficult news as the project progresses. As painful as honesty may seem, a sub-optimal or disastrous project outcome will be far worse."
>
> **Be creative in resolving stakeholder tensions.** "Intranet redesigns are about more than organizing information well. In organizations where there are tensions between corporate and local interests, there are creative ways to not only overcome those tensions, but to harness them for the advancement of all."

Lessons learned from Lisa Madden:

> **Listen to your users.** "Ask them what they want in the site. It's their user experience, so they need to provide direction."
>
> **Content is crucial.** "Allow enough time—more than you think you will need—for cataloging, gathering, organizing and creating your intranet's content. This can be a tedious and painful process, but it's critical to the success of your intranet project."

Share the load. "Hold content contributors accountable for the quality, timeliness, and maintenance of their own materials. This is the best way to ensure that your site remains manageable as well as relevant."

Lessons learned from Gordon Miller:

Meet real-world needs. "With such an inherently complex enterprise, the only possible route to user acceptance is to design a site that reflects the real-world needs and workflow of the users. Use nomenclature they are familiar with and present it within a clean, simple, and inviting design.

"If we had to do it over again now, we would create a longer testing period to ensure a smoother launch and to provide all key functionality from the very beginning."

Deloitte Touche Tohmatsu (DTT)

Using the intranet

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

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

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

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

Number of employees the intranet supports: 165,000

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

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

Design team

Entirely in-house.

Members

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

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

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

SUMMARY

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

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

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

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

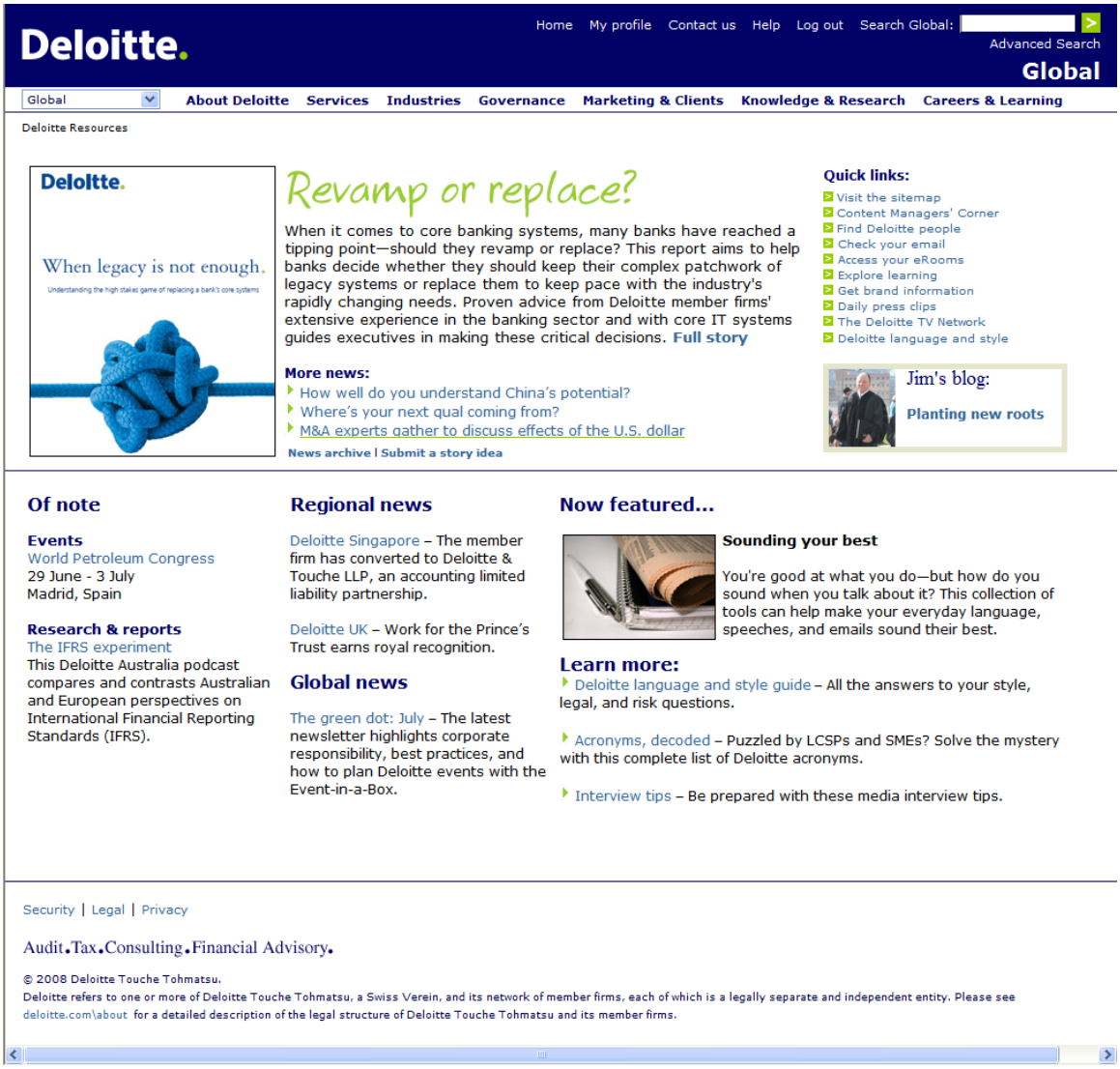
Quick links on the right provide access to the DTT employees’ most commons tasks.

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

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

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

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



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

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

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

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

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

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

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

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

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

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

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Deloitte Resources > About Deloitte > News & publications > CEO corner

CEO corner

Best of Quigley

Jim's blog
Recent entry
Archive
Subscribe to the blog
Submit future blog ideas

Jim Quigley's bio

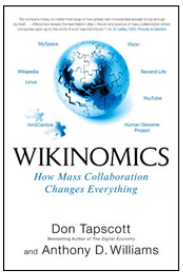
E-mail Jim

Jim's blog

Wikis – A tool we could use?

22 January 2008

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



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

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

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

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



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

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

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

Response to comments:

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

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

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

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

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

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

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

Blog archives

Published Date : 28 April 2008

Security | Legal | Privacy

Audit.Tax.Consulting.Financial Advisory.

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

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

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

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

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

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

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

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

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

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)

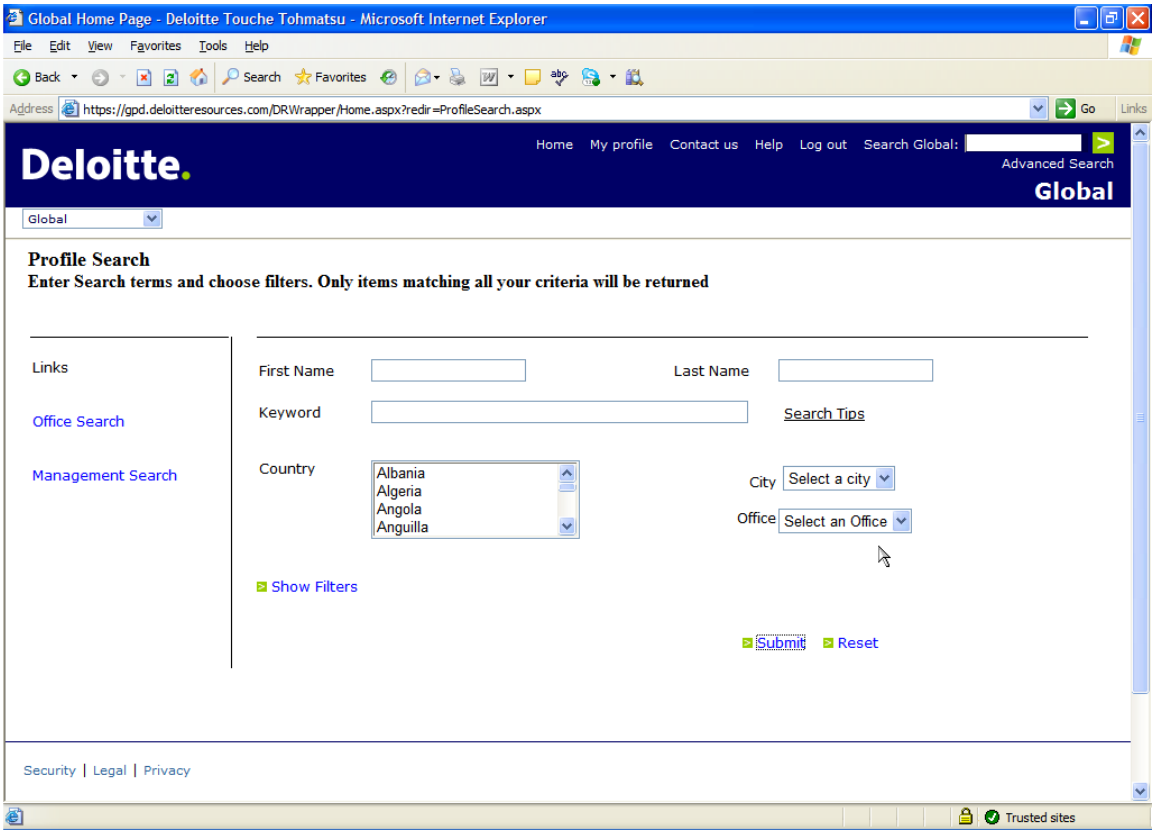


Pictured: The *Deloitte Qualifications Database*. This comprehensive, central repository features past engagement information and associated materials from across all regions, functions, and industries. The main page explains why Deloitte professionals should use this area.

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

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

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



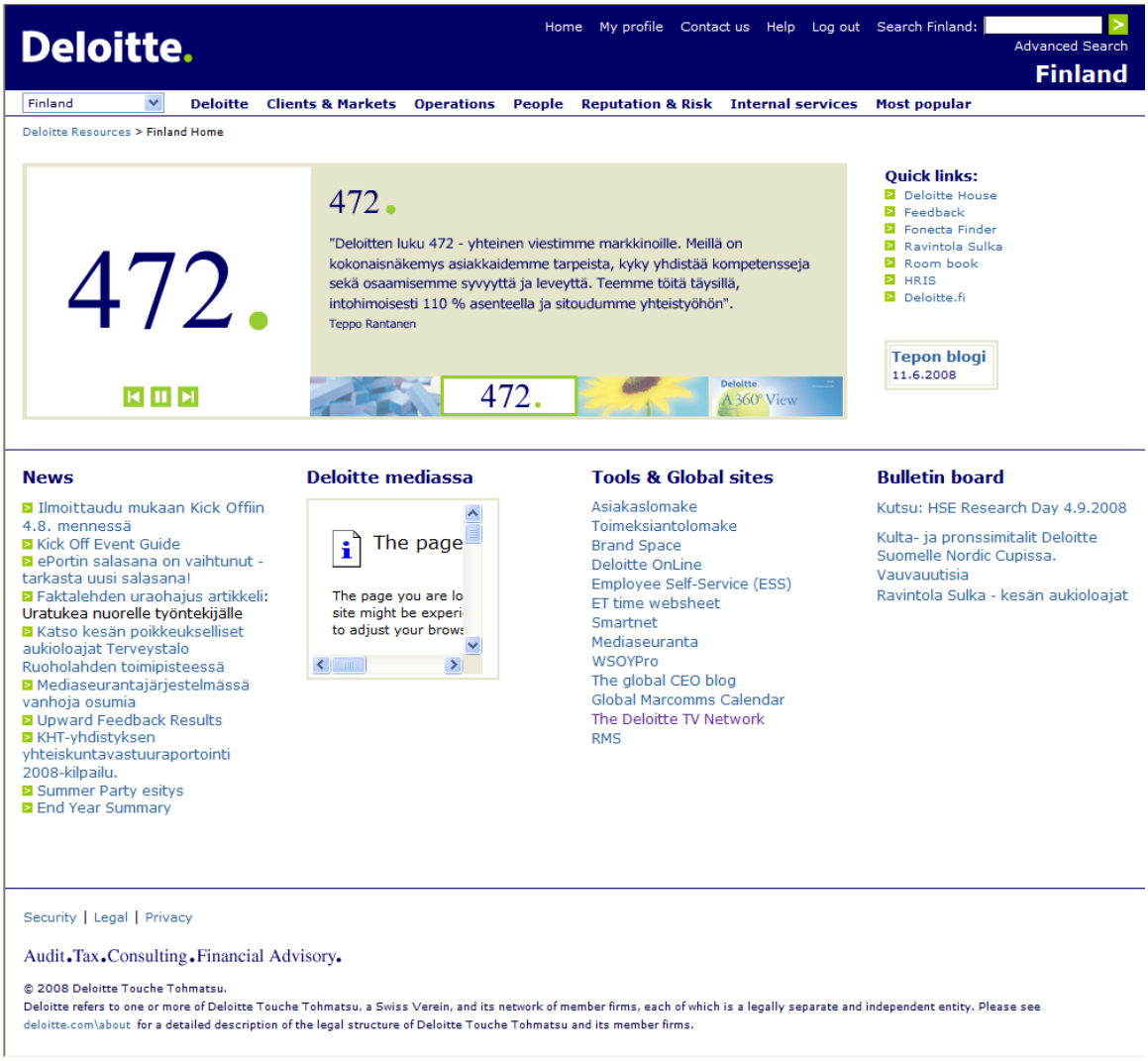
Pictured: Users can search the staff directory by keyword, job, location, and name.

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

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

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

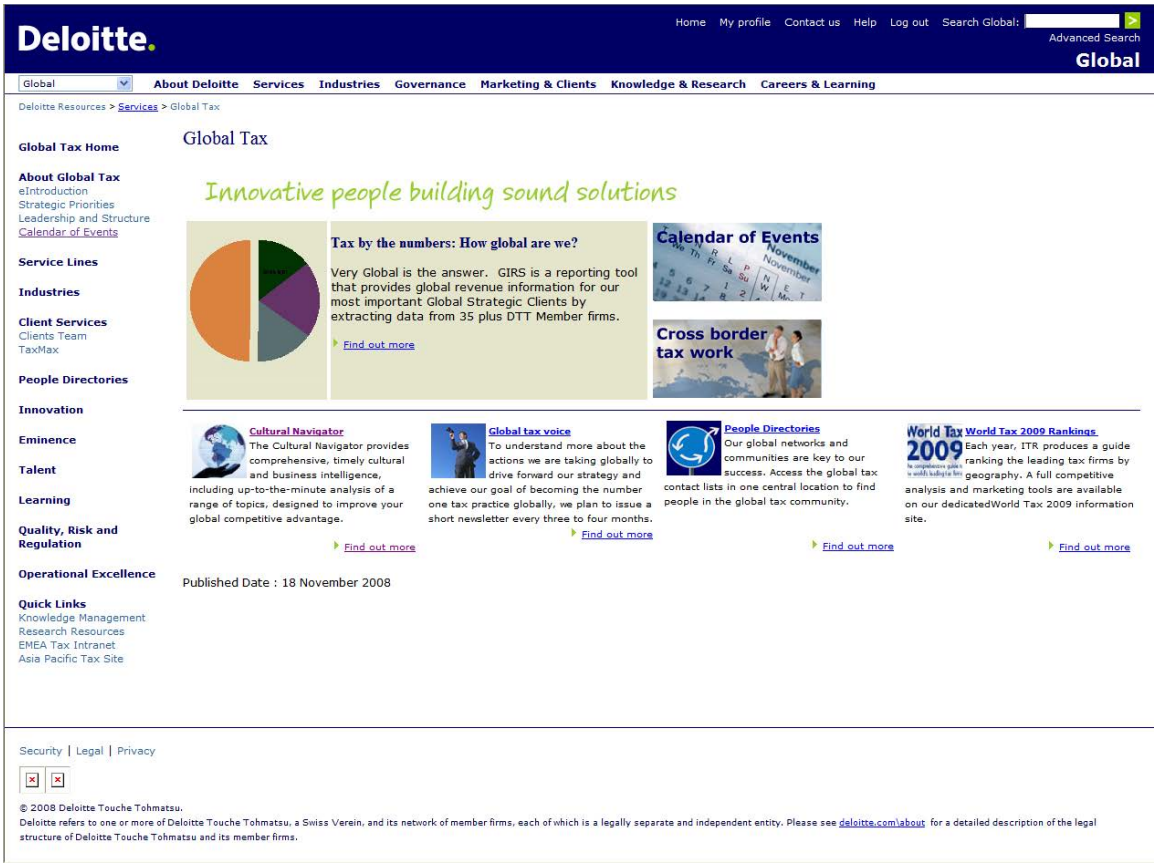
10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



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

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

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



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

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

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

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

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

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)

Deloitte.

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

Global

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

Deloitte Resources

If there's evidence, we will find it.

Exploring Deloitte Canada's new Analytic & Forensic Technology lab

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



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

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

Sorting through digital chaos

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



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

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

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

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

Working with the global network

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



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

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

More information

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

Published Date : 13 June 2008

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

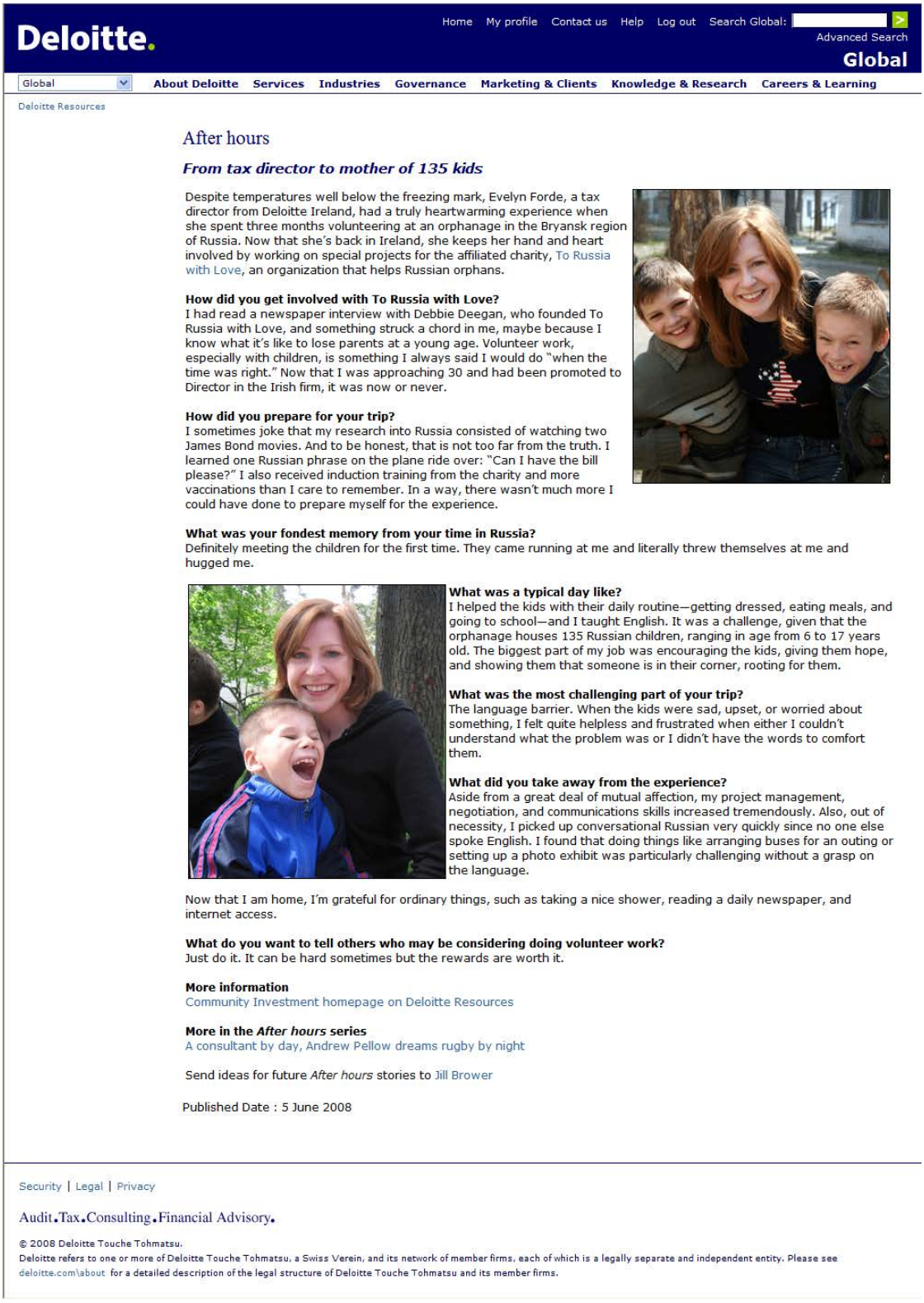
10 Best Intranets: Deloitte Touche Tohmatsu (DTT)

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

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

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

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: The *After hours* news series presents stories of Deloitte professionals doing interesting things outside of work. The above example is an interview with a tax director who volunteered to help orphans in Russia for three months.

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)

The *Deloitte TV Network* allows Deloitte's member firms to communicate and share their stories and experiences through video. This area essentially functions like a YouTube for Deloitte professionals around the world. But you won't find political jokes, American Idol replays, and teenagers stretching their artistic muscles here.

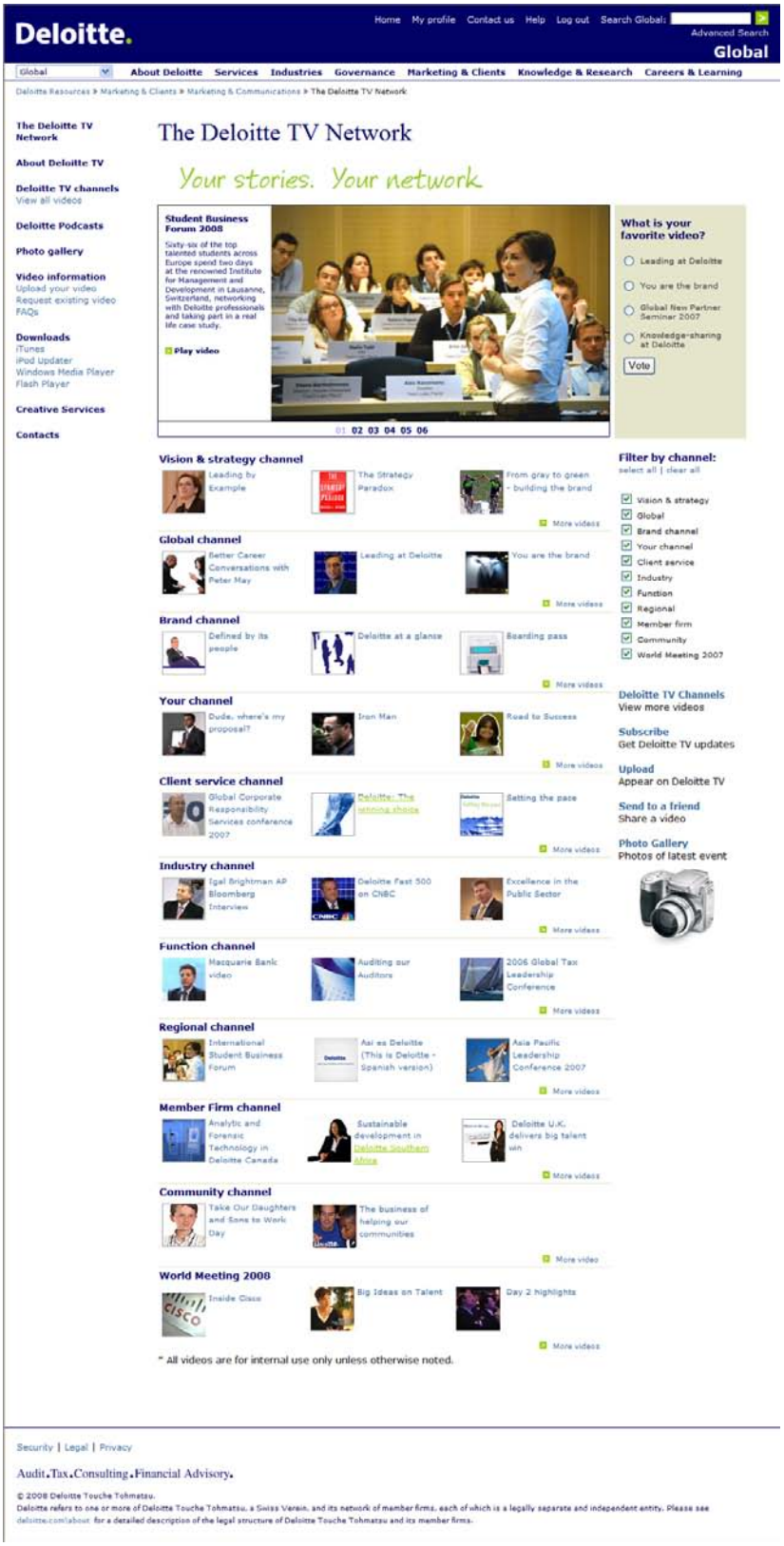
Nope, the *Deloitte TV Network* is all business. It leverages videos to relay all types of information from promoting new products and services, to announcing critical directives from senior management, to communicating what member firms are doing around the globe, and highlighting conferences and events.

The Deloitte TV Network site is an extremely interactive page that hosts a live poll for users' feedback, asking: *What is your favorite video?*

Users can filter by channel, such as *Vision and strategy channel*, *Global channel*, *Brand channel*, and *Your channel.* The latest three videos in each channel are displayed by default, and users can drill down to see more. Using these channels, users can quickly find videos of interest.

User can also download videos. Multiple formats are available to accommodate each Deloitte professionals' media preferences.

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: Users can browse business videos under the TV channels in the YouTube-like *Deloitte-TV Network* area.

In addition to news, video, and blogs, the DTT intranet supports a host of message boards, polls, and localized knowledge-sharing tools. All of these contribute to a very satisfying user experience that keeps Deloitte professionals interested and coming back for more. Most importantly, these elements help staff constantly enhance the experiences and services they give their member firm clients, and thus advance their overall business.

BACKGROUND

Global Intranet

To understand the background of the Deloitte Touche Tohmatsu (DTT) intranet, it's important to first understand the organization's structure. As mentioned above, Deloitte is not a corporation, but rather an organization of independent member firms. While 165,000 people work for Deloitte member firms, roughly 1,300 professionals work for Deloitte Touche Tohmatsu, a Swiss Verein (association), which is the global membership organization of Deloitte.

Deloitte Touche Tohmatsu, the global organization, has a global intranet that is part of the DR knowledge platform, which is intended to unite the global intranet and the 33 regional member firm sites.

DR consists of:

- DTT or global intranet, which can be accessed by all 165,000 people of Deloitte member firms
- 33 member firm or regional intranets, which are all linked to the global intranet

The member firm sites are operated independently. "But DTT's Communications team works very closely with them to share content and make sure we have a consistent look and feel, in compliance with the Deloitte brand," says Karen Frankola, director, DTT internal communications and creative services.

DR is an intranet that was primarily developed to host a Deloitte people directory and an office locator. It was also meant to be a repository for basic knowledge management information, targeted to DTT, the global organization.

From its beginnings, DR rapidly evolved to be used as an intranet platform by multiple countries, displaying content in multiple languages. It hosts the *Global Learning* platform, uses federated search to expose content from other Deloitte applications, hosts the global consulting knowledge management platform, and provides seamless authentication to dozens of applications and tools.

All intranet references and screenshots in this report refer only to the DTT intranet, unless otherwise noted.

INTRANET TEAM

"The number of people working on the DTT intranet is quite difficult to calculate," says Frankola, "because different sites are owned by different groups."

"So, for example," she says, "each of the functional groups, such as DTT Tax, has its own content manager. Conservatively, there are dozens of content managers and writers for the DTT intranet. In addition, roughly 100 people provide direct and indirect technological support through the Office of Information Management."

The global intranet staff of the DTT Communications team is made up of three full-time Deloitte professionals who are the core staff for DTT's intranet: an operations coordinator, an editorial manager, and an editorial specialist. The DTT

Communications team owns the homepage and sites for major DTT initiatives that impact all of the people who work for Deloitte member firms.

In March 2008, a content manager was hired. She spends approximately 50% of her time on the intranet. Frankola, who is director of internal communications, says that, "since we are such a small group, I am also involved in new site builds and design decisions, spending roughly one-third of my time on the intranet."

The team had no dedicated designer for the intranet until May 2008, when a designer was hired to devote half of her time to the intranet. Prior to her hire, the team occasionally borrowed DTT's Internet designer on a limited basis for special projects.

In addition to the people mentioned above, the DTT Communications team has four writers/communications specialists who regularly contribute stories to the intranet. Each spends no more than 10% of their time writing for the site.



Pictured: The DTT Communications intranet team. Front center: Rachel Flanagan; Back from left to right: Jessica Yi, Karen Frankola, Divyesh Jevtani, Jill Brower.

Governance

"Ownership of the global intranet is also complicated in the sense that no one group owns the entire platform," says Frankola. "Rather, different groups, such as DTT Tax or the Manufacturing practice, own their respective sites."

The DTT Communications team owns the global homepage and all major DTT initiative sites—such as *CEO corner* and *Deloitte TV Network*—and all major events.

In addition, DTT Communications works with all other DTT site owners to ensure consistency and often provides strategic advice on their site builds.

Because the organization has many stakeholders, the governance of the global intranet is collaborative. Three key stakeholders govern the DTT intranet: DTT Communications, Knowledge Management (KM), and Brand.

"KM is a key stakeholder due to the intranet's role as a knowledge-sharing vehicle," says Frankola. "And Brand is a key player because the independent member firms are encouraged to adhere to visual identity standards when building their intranets."

The DTT Communications team (akin to corporate communications in other companies) and KM are both in the Operations group. The head of Operations reports to the CEO. Brand is a separate division, and the Brand leader reports directly to the CEO.

"Brand has been given a lead role because Deloitte member firms are connected to each other through our brand," says Frankola. "For example, DTT cannot force Deloitte Ireland to make changes to its intranet because Ireland is a separate member firm. Instead, DTT could advise the Irish firm that their intranet design is inconsistent with brand guidelines. We are very respectful of member firm independence and try to lead them by providing examples of best practices."

The DTT Communications, Knowledge Management, and Brand teams work collaboratively with the other intranet stakeholders to drive major changes in the intranet, with support from the Office of Information Management (OIM).

Managing Brand

Member firms are provided design templates that adhere to Deloitte brand requirements, providing the same look and feel with customized content. The member firm sites also link to the global intranet, giving users the ability to move seamlessly back and forth between the sites. They can even access a drop-down menu and visit any member firm site in addition to their own.

"What this means in terms of governance is that DTT does *not* own the member firm intranet sites," says Frankola. "And therefore cannot control what content is posted or the design used. We are very respectful of the member firms' independence and instead try to lead and help them by providing examples of best practices—tools, layout, and so on—and stories they can post. DTT's goal is to lead by example and make it easy for member firms to follow the brand by providing wireframe templates and plug-in content."

"For example," she says, "to encourage member firms to put our CEO's blog on their homepages, we create an HTML-ready promotion box, so each member firm can promote the blog easily, in a consistent way."

Staffing Over Time

The DTT Communications intranet team began with only two people: an intranet manager and the director of eCommunications. In early 2005, a content manager was added to the team. With changes in roles and reorganization of the Communications team, by late 2006 the team consisted of:

- A director of internal communications
- An editorial manager
- An editorial specialist who writes for and manages the global homepage

- An eCommunications specialist who focuses on advising on other parts of the global site, working with member firms to promote global content and initiatives, building an online intranet community, and managing new, large site builds and rebuilds for DTT initiatives

This is the current model with three additions: a content manager, graphic designer, and a director of online strategy, who is leading efforts to take DR to the next level in collaboration with DTT and member firm stakeholders. All three are devoted to the intranet roughly half of their time.

GOALS AND CONSTRAINTS

Overall Goals

"The primary goal of the DTT intranet is to support Deloitte's vision to be the Standard of Excellence by facilitating interactions between and across member firms, service lines, and levels that reflect Deloitte's 'Always One Step Ahead' brand positioning," says Tracey Edwards, DTT shared services and chief knowledge officer.

"The intranet puts user needs first by connecting the 165,000 people of the Deloitte member firms in many ways," says Edwards.

The goals of the DTT intranet are to:

- Create a dialogue among Deloitte professionals around the globe, communicating organizational information, sharing best practices, and aligning professionals with the Deloitte brand and vision.
- Increase productivity by providing a rich array of tools, such as robust search, people profiles and people directory, and rich content creation and delivery.
- Provide a common platform for knowledge management communities.
- Create an interactive user experience through the use of wikis, blogs, content rating, and discussion boards, and integration of recruiting tools and systems.
- Create a customized user experience driven by profiles and preferences.
- Create mobile content delivery, with more interactive capabilities for end users.

In addition to the intranet's overall goals, the DTT Communications team has specific goals for the homepage and the major DTT sites it owns.

Putting Users First: Telling Good Stories

"As its name implies, the primary goal of Deloitte Resources—DR—is to serve as a resource of news, information, best practices, and tools for all Deloitte member firm professionals worldwide," says Frankola. "Since Deloitte member firms are all independent entities, Deloitte Resources is the primary vehicle for connecting them and developing the brand they share."

"Our overall goal for the intranet is to create a site that puts users first—not just in terms of design, but in content," says Frankola. "Particularly on the global homepage, we are committed to telling stories that people want to hear. We view ourselves as in-house journalists, using techniques like humanization (building stories around a central person) rather than just providing facts or quotes from senior leaders."

But her team doesn't control all of the intranet content. There are many stakeholders, she says, so her team tries to lead by example.

Her overall goal for these pages is to have the people of Deloitte feel that they are getting relevant information that will help them, "by doing their jobs more effectively, connecting to their colleagues, or inspiring them to give back to their community," she says.

To accomplish this objective, her team has developed a writing standard where it writes in a third-person, objective style with a premium placed on showing versus telling. "In other words," she says, "we don't tell our readers that Deloitte is innovative or cares about its people; rather, we show real-life examples that we hope will make that case. We use rich content such as video, photos, and catchy headlines to capture their interest. We believe our people are sophisticated professionals that appreciate quality content and can think for themselves. So we try to avoid self-serving articles and corporate-speak.

"We are committed to communications that are truthful, straightforward, and jargon-free, written in a third-person, journalistic style," says Frankola. "We also work to align our stories to strategy and focus on key messages, delivered in a consistent way, such as the importance of talent."

"We want our users to view the homepage in much the same way as a news website such as CNN," says Frankola. "They should be able to easily access compelling, engaging information that is relevant to them."

Frankola also says that they try to tell stories online in a holistic way instead of just writing a shorter version of a print story. "For example," she says, "a photo and its caption can tell an important element of a story better than writing additional paragraphs. A short video can express opinion and emotion in a stronger way than even quotes."

The global intranet site is the primary internal communications channel for the DTT Communications team. "We are working to evolve to a pull-type of communications strategy in which information is posted on DR, where employees can easily access it," says Frankola. "Even when push communications—such as e-mails—are used, content is almost always posted on DR for later access. For example, we send electronic newsletters with short blurbs linking to full coverage on DR.

"Even though we have some technology constraints, we have no limits when it comes to telling good stories," she says. "We always ask ourselves: 'What would our audience want to hear?'" To keep abreast of their audience and site usage, the DTT intranet team studies site metrics closely and often conducts informal focus groups.

Going Green

Frankola says the Deloitte network of member firms is evolving toward a greener way of communicating, and the intranet is a vehicle for that change. "We are not printing material to the degree we did previously," she says. "For example, when a major report on talent was released several months ago, we did not print it." Instead, they posted it on DR and promoted it though a vanity URL.

Facilitating Collaboration

"We want the intranet to be as collaborative as possible," says Frankola. "We ask our readers to contribute story ideas, photos, and comments." The site uses polls and contests to engage professionals around the world. She says the site is helping the organization transition from a one-way, top-down, well-scripted type of communication into a two-way, freely-scripted, engage-in-dialogue type of organization. "DTT's current CEO, who took office just over a year ago, is excited

about more collaborative types of online communications and is writing an internal blog," she says.

The Challenges of Local Autonomy

Because the Deloitte organization is structured as a network of independent and autonomous member firms, the DR global site has a unique challenge in reaching its users. The DTT or global homepage is not the default start-up page for any of the 165,000 Deloitte member firm professionals, and there is no forced behavior that sends people to the global site. Roughly half of the member firms are on the DR platform, but their staff members might not even be aware a global DR exists. Instead, they get a customized local homepage, which typically has numerous links to global DR. "When a user clicks on a DTT story, he seamlessly lands on global DR, but may believe he is still on his country's intranet," says Frankola.

"Many member firms—including the US member firms, which make up one-third of total employees—do not use the Deloitte Resources platform for their global intranet," she says. "Their users can access global DR, but they must sign on with a password. Many employees in these member firms are not even familiar with the term 'Deloitte Resources,' although they visit it every time they read DTT content."

Even the employees who work for DTT (the "global office") rather than a member firm don't have the global homepage as their default start-up homepage, she says.

"For example, many DTT employees work in the United States, so their start up homepage is the Deloitte US intranet, rather than the DTT Deloitte Resources homepage. These Deloitte professionals can choose to make global DR their homepage, but they still must access the US intranet for some services. In other words, DTT staffs have two competing intranets: global Deloitte Resources and the intranet of the member firm where they are located. This makes it difficult to use the DTT intranet as a destination where all employees can be expected to pull critical information."

English as the Official Language

Another major constraint is language. While English is the official language of Deloitte worldwide, not every member firm professional is fluent. Global DR uses only English (except for occasionally sharing best practice examples in other languages), which means many users may not find the content easy to understand. Some member firms translate global stories in their native language before posting on their homepages, but more typically, says Frankola, they simply post a link to global DR.

TIMELINE

Initially, the focus of the DR OIM team was on technical enhancements and increased functionality. "Once the technology was stable, the DTT Communications team played a significant role in evolving and promoting the business use and value of the intranet platform," says Kimberly Troske, OIM deployment manager and a member of the DR team since its launch. She provides the following information related to the progress of DR.

Inception

- **September 2002:** The DR program was initiated, beginning with defining high-level requirements, governance, and scope.

- **October 2002:** Immediately following inception, the DR program team started conducting interviews with DTT functional areas. Requirements documentation and development began shortly thereafter.

Initial Training and Launch

- **March 2003:** The first content management training was held in New York. It was targeted for content managers for global functions who would have sites for the initial launch.
- **April 7, 2003:** Launch date.

Key Enhancements

A number of updates were made to DR from 2003 through 2006—sometimes up to five releases in a 12-month period.

- **August 2003:** Introduced "Unified content management" which allowed for sharing content, as appropriate, between the intranet and the client extranet.
- **October 2003:** Implemented page-level security for limited accessibility on the front-end.
- **December 2003:** Re-branded the entire front-end.
- **May 2004:** Redesigned the maintenance of primary landing pages and introduced "marketing-friendly" URLs.
- **August 2005:** Provided multi-language search capabilities
- **January–April 2006:** The four releases over this period enhanced end-user form functionality and form reporting capabilities, implemented ability to track downloads, and launched a new search interface including search tips.
- **September 2006:** Implemented ability to track search terms within Web analytics tool.
- **2007 and forward:** The DR team changed focus in 2007 and the development teams switched their focus to designing and developing ECM/portal capabilities. During this time, no major technology updates were made, but country participation continued to grow, as shown below.

Total number of locations/sites (independent Deloitte member firms) on the DR platform:

End of 2003: 2
End of 2004: 10
End of 2005: 16
End of 2006: 20
End of 2007: 30
End of 2008: 33

There is no mandate that member firms have to join the DR platform. "Because of the way our organization is set up, each member firm has the option to choose its intranet platform," says Troske. "However, since Deloitte Resources became available, many have chosen to join for knowledge sharing, content promotion, and accessibility by others outside their member firm."



Pictured: The links available off the global DR homepage. Here, users can see the site's IA and find contacts for each site. The country/regional list is the 32 sites that are on DR (for a total of 33, including the Global DR site).

USERS

The users for the global intranet are all 165,000 Deloitte professionals. They work in more than 140 different countries. Most of them speak English, but it is a second language for many.

Types of users include:

- 8,000 member firm partners that have ownership in their firms (nearly all work directly with clients)
- Managers, senior managers, and directors who supervise staff
- Client practitioners who work with clients, going from assignment to assignment
- Specialists and administrative professionals who provide support for fellow professionals

More than 100,000 Deloitte professionals work directly with clients and are typically located at client sites, rather than in the office. Most Deloitte professionals are issued laptops because they travel frequently; the organization has a culture that also permits most professionals to work from home at least occasionally.

USER TASKS

Some of the most common tools for Deloitte member firm professionals—reporting time and expenses—are not found on Global DR, but are located on their member firm site. "However," says Jill Brower, DR editorial specialist, "there are important global tools on DR, and we hope users searching for their tools see an arresting headline or photo that causes them to read a story."

On the top of the homepage are the most timely and relevant news items. Users can also access:

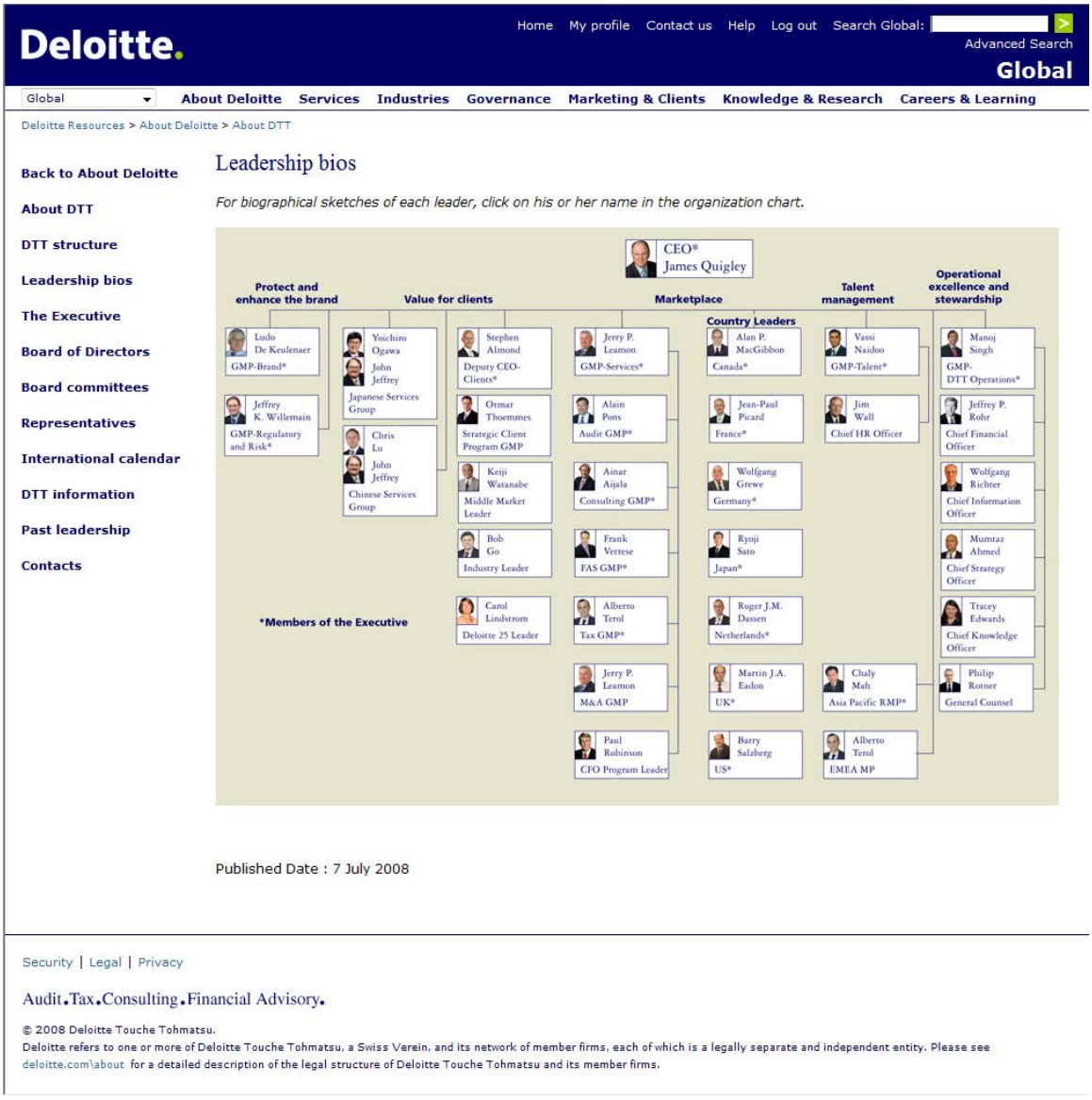
- resources, such as press releases and press clips that mention Deloitte and other Big Four firms;
- the *Global People Directory* (an online directory of all people in the member firms);
- Webmail, to check e-mail from anywhere in the world;
- collaborative eRooms, where users can post and share information with team members; and
- e-learning courses and other business-specific tools.

Top 10 Most-Visited Pages

The following is a list of the top 10 most-visited pages on Global DR over the past year:

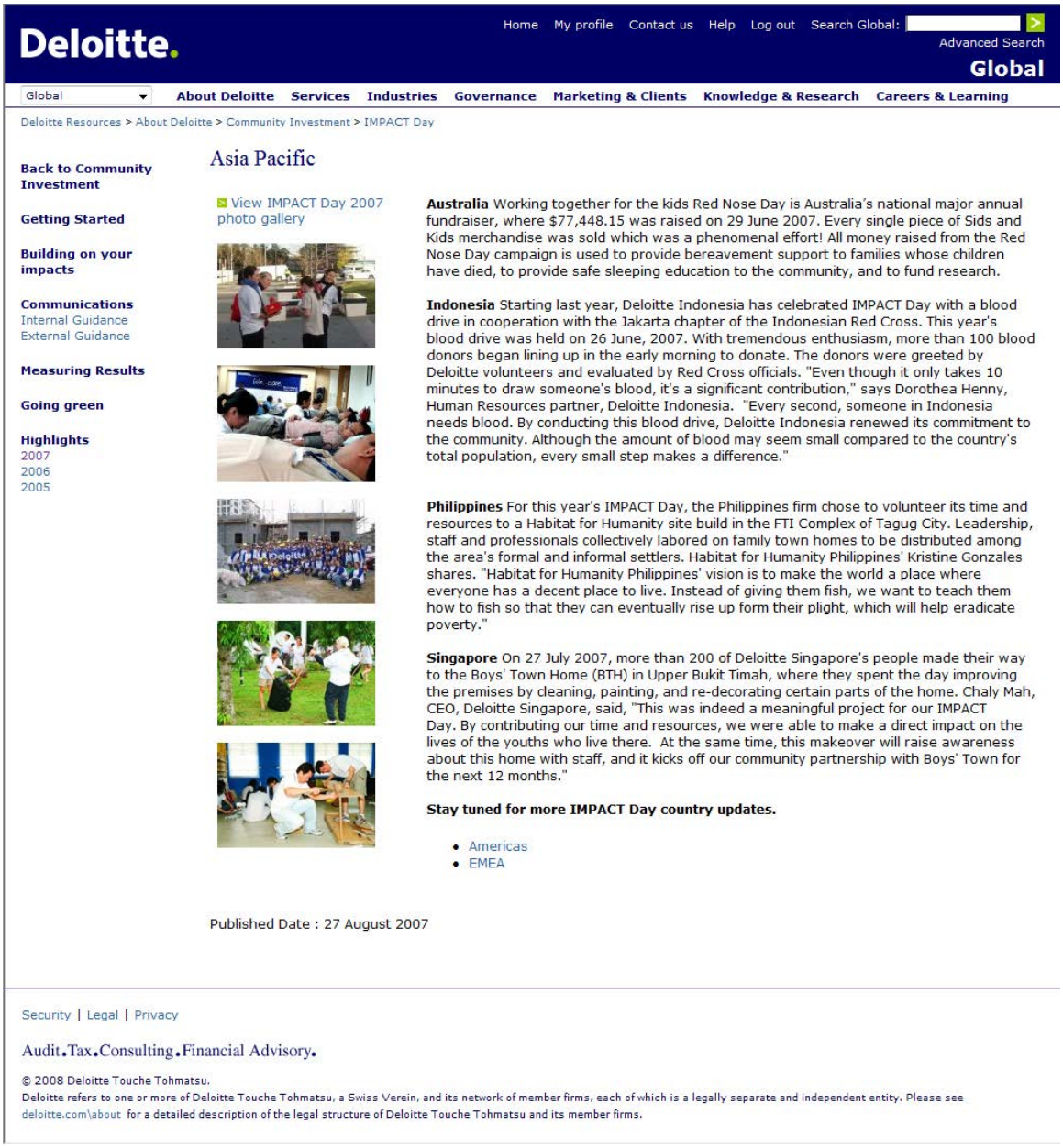
1. The global homepage
2. The *Global Learning* homepage
3. Internet-based e-mail landing page
4. Deloitte Entity Search and Compliance (DESC) Restricted Entity List
5. *Audit Learning* homepage
6. *Deloitte Risk Management System* (DRMS) homepage
7. *CEO corner*
8. *International Tax Research Resources* homepage
9. *Careers & Learning* homepage
10. *International Tax* homepage

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: This content page is packed with useful information for Deloitte professionals looking for material on the organization's leadership. It features an easy-to-use, interactive organization chart, where users can find biographical sketches of each leader, along with their photos.

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: A content page containing information on Deloitte's IMPACT Day, on which tens of thousands of Deloitte professionals give back to their communities. It includes a brief overview of the annual event and a photo gallery of IMPACT Day participants from all over the world (in this case, from the Asia Pacific region).

DESIGN PROCESS AND USABILITY ACTIVITIES

Homepage Redesign

A year ago, the DTT Communications team redesigned the homepage.

In June 2007, a new CEO and senior leadership took office, and the decision was made to discontinue several internal communications channels, thereby making the global intranet the primary vehicle for internal communications. "With this in mind,

the Global DR homepage was redesigned like a newspaper, with major news items and stories 'above the fold,' and other items of note below it—like subsections of a newspaper," says Rachel Flanagan, DR editorial manager.

The redesign also added a *Now featured* section, which functions like a theme package, typically pulling in several elements—such as a video, an article, and a tool—around one theme.

"Previous to this shift, the homepage served as something of a catchall for links, but no feature stories," says Flanagan. "Our goal with the redesign was to have every link on the top half of our page link to a news story, where we could give our readers the most important information in an interesting and readable way." Each story then links to relevant pages for more information.

Making Changes

The Communications team has been fine-tuning the homepage over time by analyzing Web metrics to find out which types of stories get the most readers. "On the global homepage, we are continually re-evaluating which stories to run," says Divyesh Jevtani, DR operations coordinator.

"We find that the most popular stories either tell a person's story, or tell a business or client story through one person's point-of-view," he says, "The common thread was people. So we now focus on tying in the people of Deloitte to any story topic."

Another way they increase the readership is by working with the other member firms to have them link to the global site from their local firm sites. "In getting feedback from the member firm editors, we learned that Deloitte Resources not only provides these users with a variety of resources that allow them to provide efficient and effective client service, but the design of the site also encourages user participation through polls, calls for story and video submissions, and a variety of blogs, including one from the DTT CEO," says Jevtani.

So, they provide a variety of options for users to access the information they are most interested in, whether it be a blog, a story, or a database, as quickly and easily as possible.

"Feedback from users and other content managers helps us to continue to evolve our content, tailored to the user," says Jevtani. "We hold a monthly meeting with DTT and member firm intranet communicators to share best practices and get feedback on what users are responding to."

Measuring Success

Since changing the homepage strategy, the team has seen significant increases in usage for the homepage overall as well as for individual stories. For example, between June 2007 and June 2008, the monthly homepage visits increased by 136%, and the average number of visits to feature stories increased by approximately 150%. "For the *World Meeting* site, we saw a 200% increase in visits to the 2008 homepage versus the 2007 page," says Brower.

In 2007, the team surveyed Deloitte professionals worldwide to understand how, when, and where they preferred to receive their communications. Partners ranked strategy, brand, competitors, and clients among their top choices of subjects to read about. Staff members ranked strategy, brand, talent, and global performance as their top choices. "We put this information into practice on Deloitte Resources by striving for a balance of each of these subjects in our stories and promotions," says Brower.

While most partners still prefer to receive communications from senior leadership through e-mail, most staff members said they preferred to access it online, she says. Both groups were also were interested in viewing videos and listening to podcasts. "With the *Deloitte TV Network* and special events videos, we are trying to bring these elements to the people of Deloitte," says Brower. "Since our Deloitte.com counterparts create a variety of podcasts, we also link to these from the global homepage."

URL AND ACCESS

The global intranet is accessed at www.deloitteresources.com. Users can access the site from any computer, anywhere by simply entering their username and password.

The DTT DR homepage is not the start-up page for Deloitte professionals; instead, local member firm intranets are set as new hires' start pages.

TECHNOLOGY

DR is a custom application built on Vignette Dynamic Link Library. Because this version offers only limited customization, the team is moving the intranet to the latest version of Vignette this year.

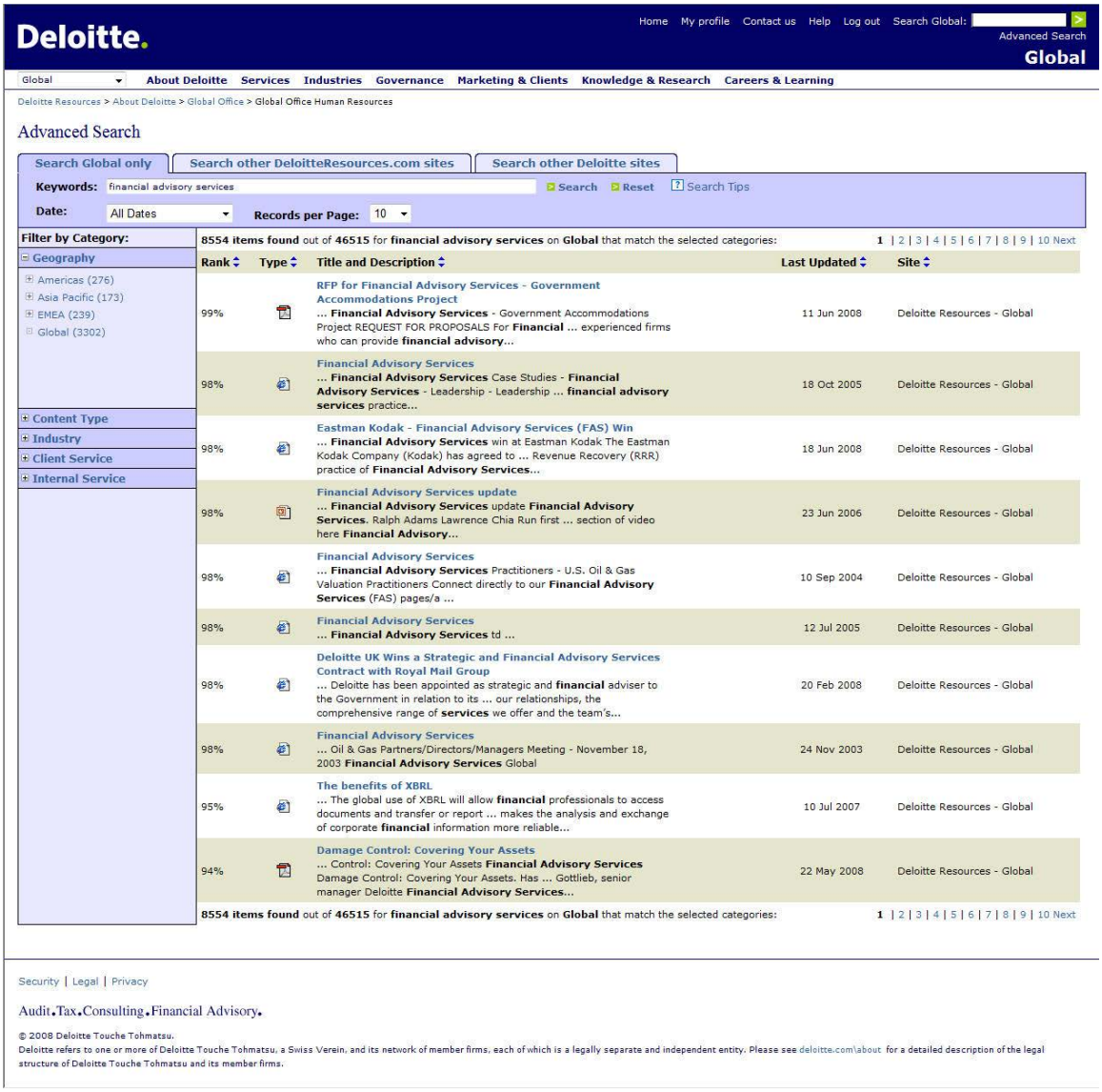
As its content editor, the team uses the eWebEditPro application (version 5.1.0.43), supported by Ektron. For Web metrics, DTT uses Omniture Site Catalyst, Version 13.5.

The underlying technology has remained the same through the years but the team has made updates to style sheets in order to maintain and promote global brand compliance.

SEARCH

Autonomy's K2 search platform is used for both the intranet and the Deloitte.com public site. The team is in the process of migrating to Autonomy's IDOL search platform and is expect to release it by the time this report is published.

"We've been customers of the K2 platform for more than eight years," says Jevtani. "It provided robust customization to meet our search needs across numerous applications. Autonomy acquired Verity a couple of years ago and released the IDOL platform as the next generation enterprise search so it's a natural progression for us."



Pictured: A listing of the firm's financial advisory services search results from the intranet's advanced search option. The search results include information on financial advisory services, member firm clients, and even relevant news.

CONTENT MANAGEMENT

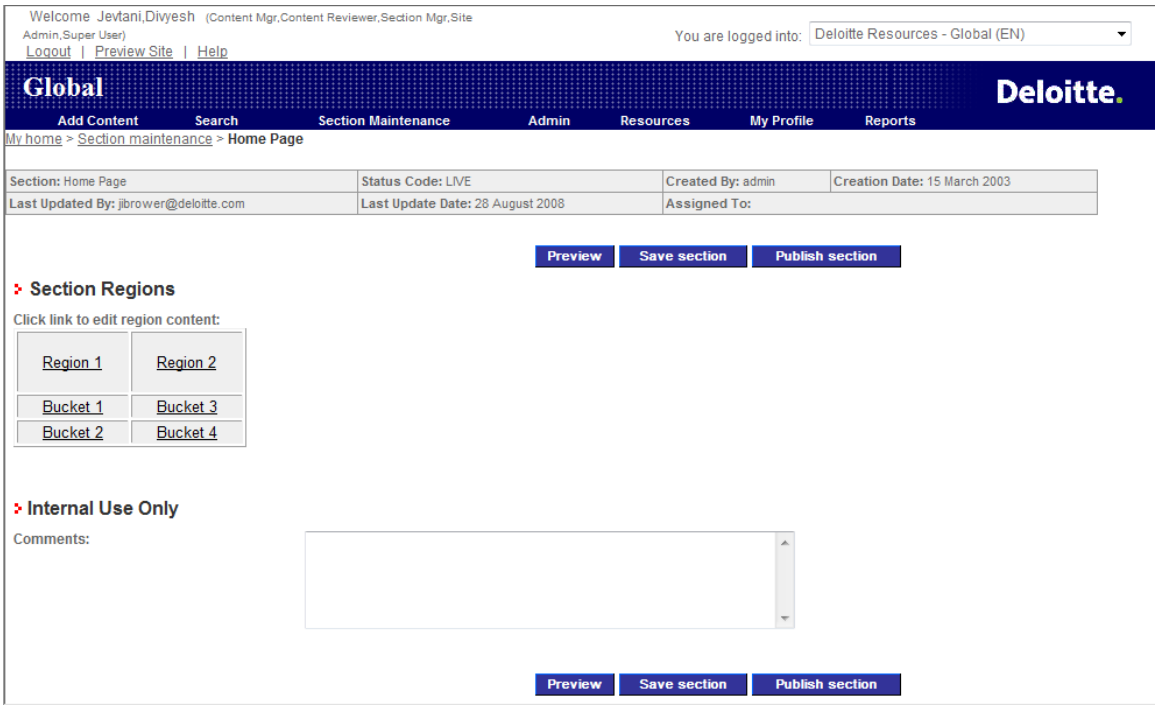
The site's CMS was initially built with the Vignette CMS product. "Over time, however, we customized the capabilities to such an extent that the code base ultimately became wholly custom-developed," says Troske.

The CMS provides templates for content managers to create site homepages, secondary landing pages, and content pages. There are 12 custom content templates as well as a homepage and landing page template. These templates provide content managers the ability to create content that is globally branded but locally focused.

"Content managers follow brand guidelines when creating pages, contributing to a highly consistent appearance from country to country, and page to page." says Brian Resnick, Senior Manager, DTT Brand Development. "That look and feel—clean and

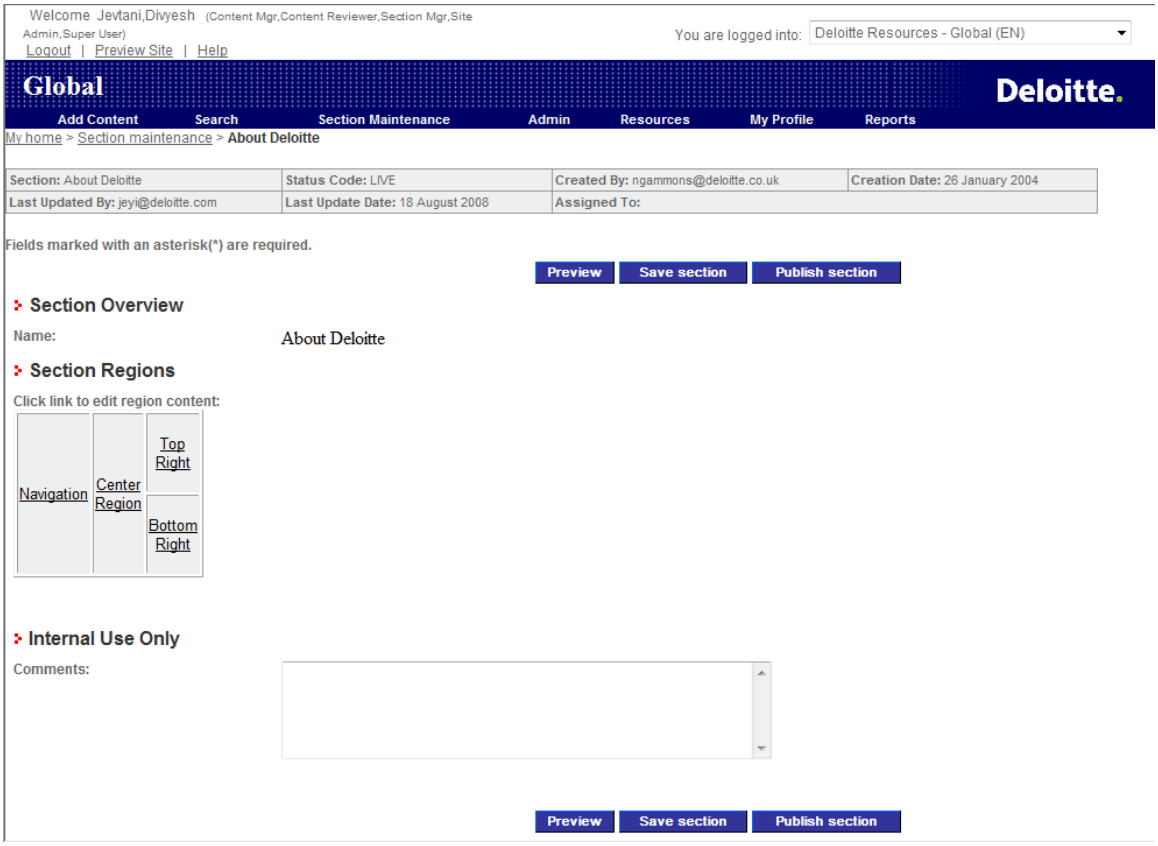
elegant in its simplicity, with carefully considered focal points of insight and inspiration—is completely informed by the notion of 'focus,' the brand essence of Deloitte."

The CMS provides search capabilities, content cloning, expiration and resurrection of content, application of global taxonomy/classification to content, the ability to restrict access to content pages to a defined list of users, and custom JavaScript and media capabilities.



Pictured: The content manager has a wireframe that provides guidance to content editors.

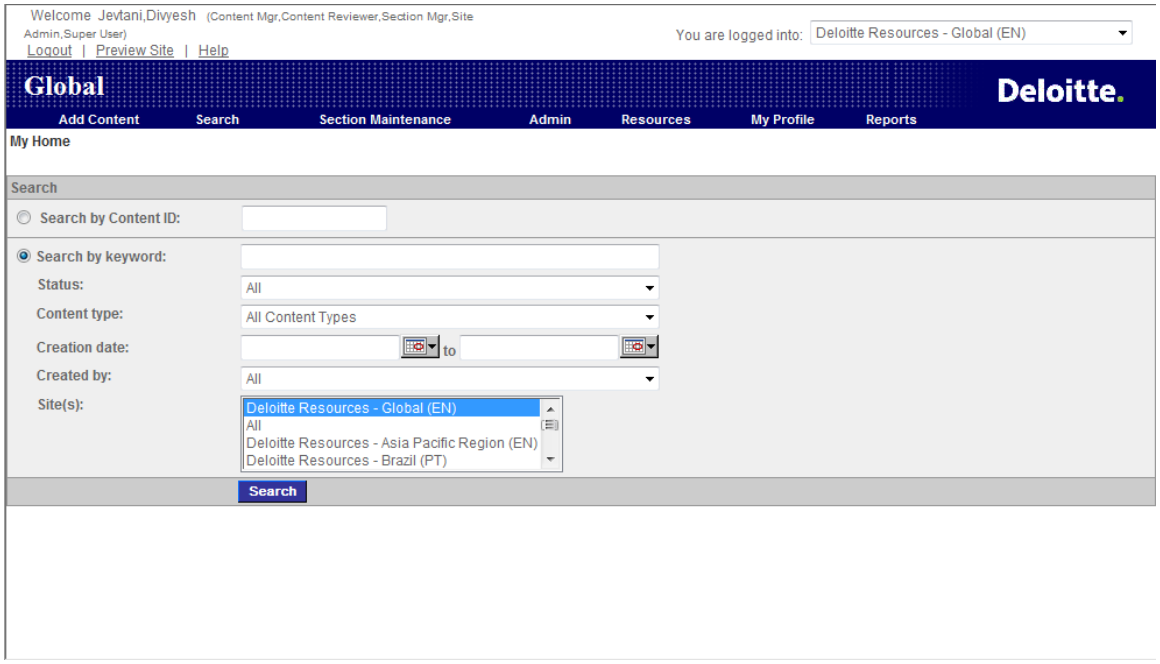
10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: This view of the content manager wireframe shows content editors where specific content blocks will appear on the page.

Each country, region, or location that wants to launch a site on DR has the responsibility of appointing content managers and owning and being accountable for any content posted on that site. Although the global team provides training, guidelines, and suggested practices, ultimately, every group owns their content. Likewise, within the global site, where there is not such a clear umbrella of ownership, global functions and groups take ownership for the content they post on DR, but the Global Communications group is responsible for owning and maintaining the global homepage.

“Because of the structure of our organization, it is hard to enforce templates for independent member firms,” says Jevtani. “So the DTT Communications team has created relationships with our colleagues around the world that manage different sites to share best practices and templates.”



Pictured: The homepage when a content manager logs in.

FEATURES

We've described this site's many useful and interesting features throughout this section. Following are brief descriptions of other notable features and screens showing them in action.

***Global Learning* homepage.** "The *Global Learning* homepage is consistently one of our most-visited sites on Deloitte Resources," says Brower. Because so many Deloitte professionals use this site to complete both required and non-required e-learning courses, its readership increases monthly. In just one year, between June 2007 and June 2008, the number of site visits increased by 64%.

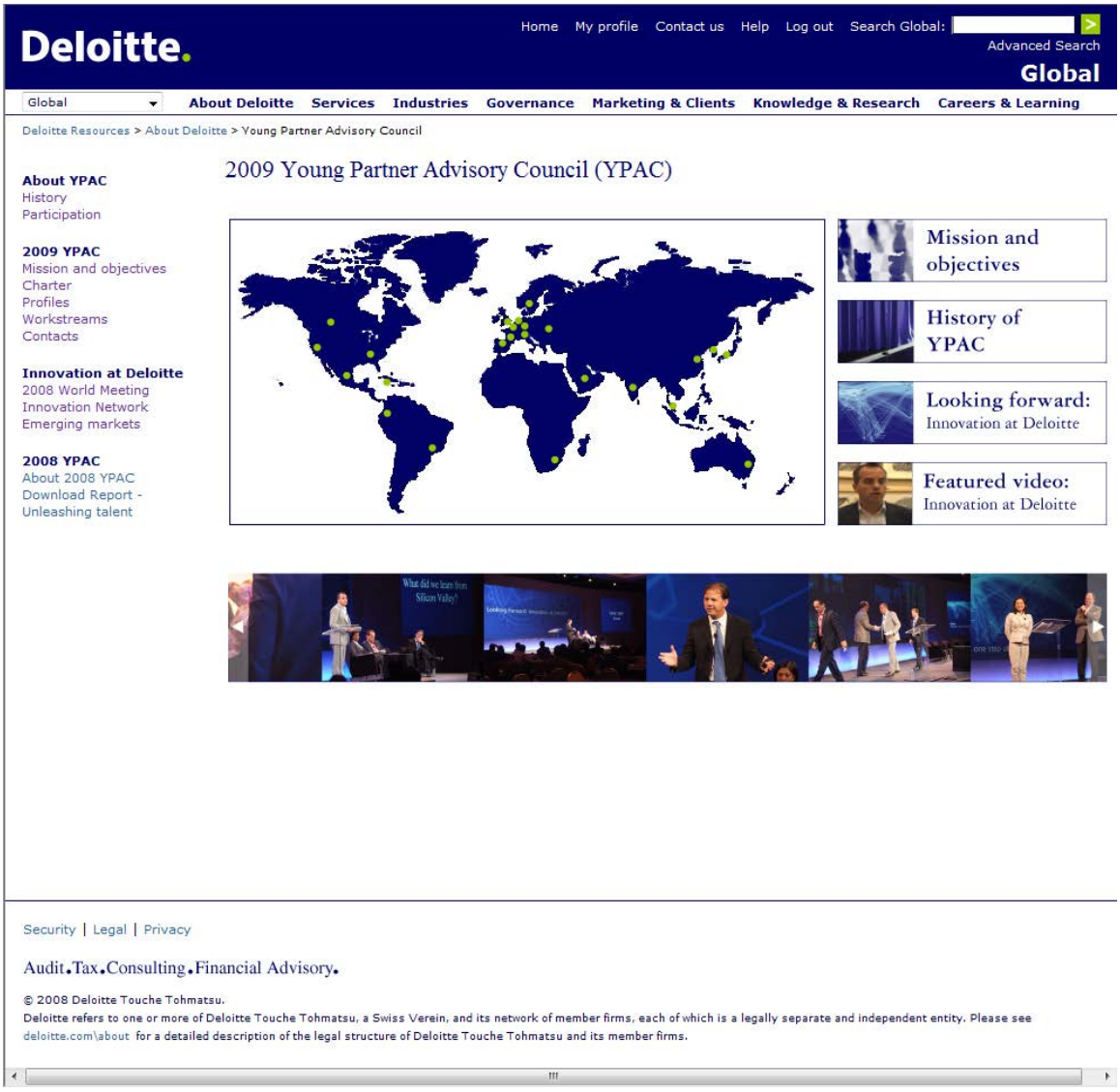
10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: Deloitte's *Global Learning* homepage serves as a one-stop-shop for all Deloitte professionals accessing e-learning courses. The site links to a variety of e-learning information and programs, including enrollments, certifications, a library of books, and a variety of other options for enhancing professional skills. The site also includes a Flash navigation in the center of the page that lets users quickly view and access the most popular learning tools.

***Young Partner Advisory Council* (YPAC) homepage.** Launched in August 2008, YPAC is a group of young leaders tasked with researching and presenting on one particular topic of importance to the global organization. "This year's group is focusing on innovation, and we aimed to make their site as innovative as possible to reflect this," says Brower. The main image on the YPAC homepage is a world map, with green points indicating each YPAC member's home country. When users click a green point, they're taken to that person's biography.

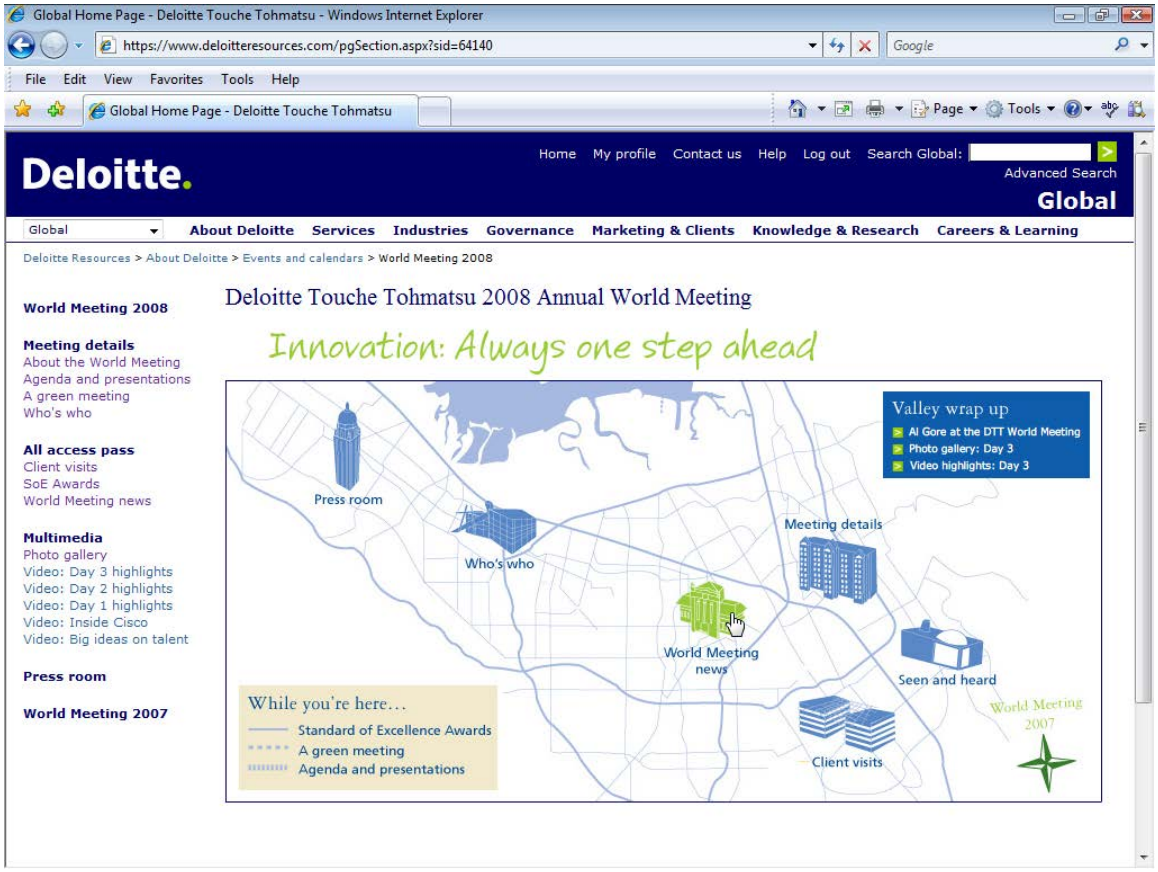
10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: The YPAC homepage. The Flash map of YPAC member locations lets users click on the green dots to access profile pages for each YPAC member. Users can also scroll over the images below the map to see informative captions.

***Annual World Meeting* page.** Deloitte's Annual World Meeting brings together the heads of all Deloitte member firms. In 2008, it was held in Silicon Valley. As the screen below shows, the theme was "innovation" and the concept is reflected in the *Annual World Meeting* page's features.

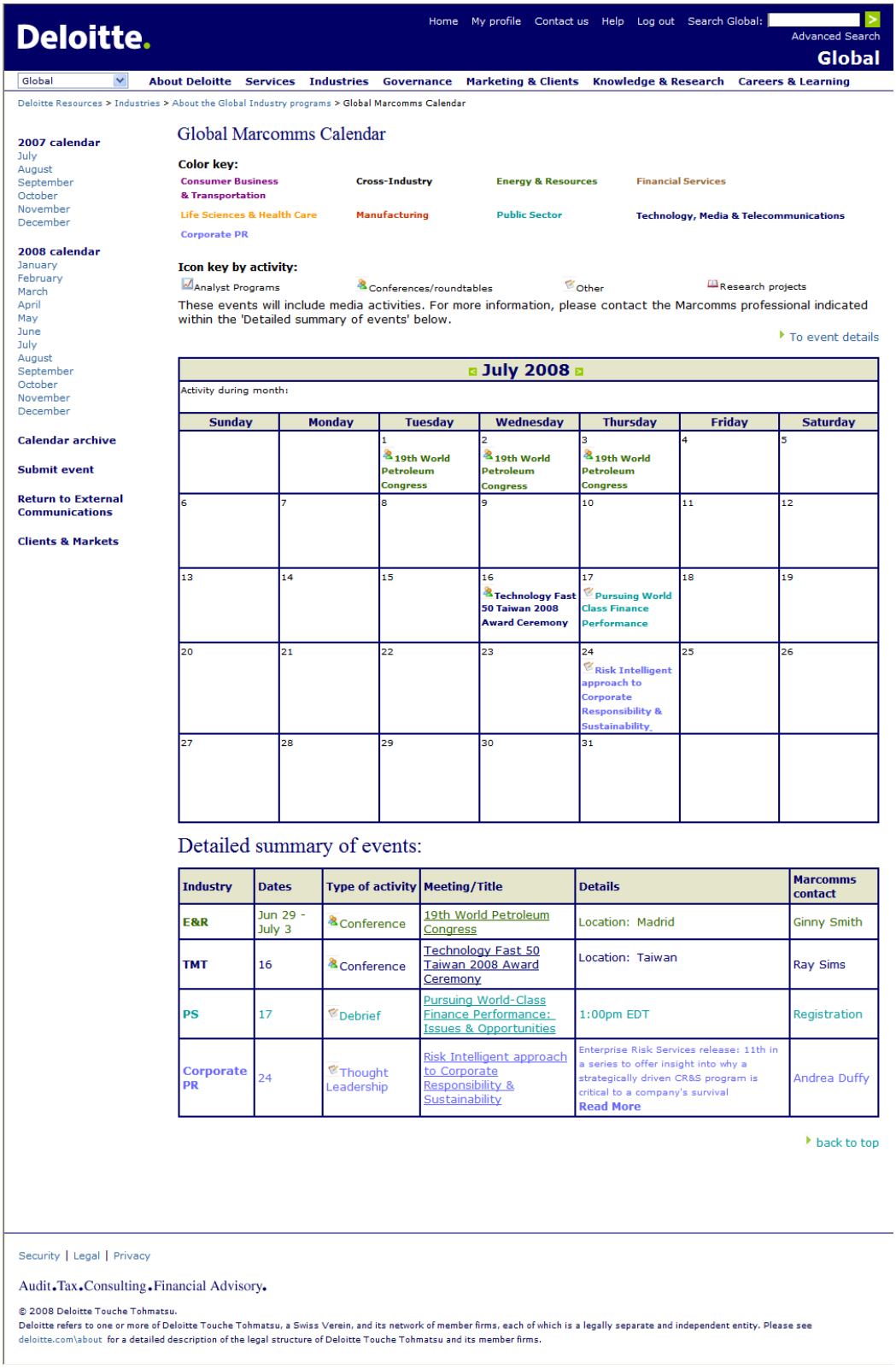
10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Pictured: DR hosts sites for all major Deloitte sponsored events such as the annual World Meeting, which brings together the heads of all Deloitte member firms. This year, the meeting was held in Silicon Valley with a theme of "innovation," so the designers created a site page using innovative navigation and elements. In addition to left-hand navigation, people could use the Silicon Valley map on the meeting's homepage as an interactive tool to locate the information they needed. The site also hosted videos, daily photo galleries, a form for anyone to submit questions to speakers, agendas, speaker presentations, and all news surrounding the event.

Interactive calendars. DR hosts a number of interactive calendars tailored to specific groups and functions.

10 Best Intranets: Deloitte Touche Tohmatsu (DTT)



Deloitte.

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

Global

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

Deloitte Resources > Industries > About the Global Industry programs > Global Marcomms Calendar

2007 calendar
July
August
September
October
November
December

2008 calendar
January
February
March
April
May
June
July
August
September
October
November
December

Calendar archive

Submit event

Return to External Communications

Clients & Markets

Global Marcomms Calendar

Color key:

Consumer Business & Transportation | Cross-Industry | Energy & Resources | Financial Services
Life Sciences & Health Care | Manufacturing | Public Sector | Technology, Media & Telecommunications
Corporate PR

Icon key by activity:

Analyst Programs | Conferences/roundtables | Other | Research projects

These events will include media activities. For more information, please contact the Marcomms professional indicated within the 'Detailed summary of events' below.

To event details

July 2008

Activity during month:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1 19th World Petroleum Congress	2 19th World Petroleum Congress	3 19th World Petroleum Congress	4	5
6	7	8	9	10	11	12
13	14	15	16 Technology Fast 50 Taiwan 2008 Award Ceremony	17 Pursuing World Class Finance Performance	18	19
20	21	22	23	24 Risk Intelligent approach to Corporate Responsibility & Sustainability	25	26
27	28	29	30	31		

Detailed summary of events:

Industry	Dates	Type of activity	Meeting/Title	Details	Marcomms contact
E&R	Jun 29 - July 3	Conference	19th World Petroleum Congress	Location: Madrid	Ginny Smith
TMT	16	Conference	Technology Fast 50 Taiwan 2008 Award Ceremony	Location: Taiwan	Ray Sims
PS	17	Debrief	Pursuing World-Class Finance Performance: Issues & Opportunities	1:00pm EDT	Registration
Corporate PR	24	Thought Leadership	Risk Intelligent approach to Corporate Responsibility & Sustainability	Enterprise Risk Services release: 11th in a series to offer insight into why a strategically driven CR&S program is critical to a company's survival Read More	Andrea Duffy

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Pictured: The global Marketing and Communications calendar is updated monthly and features all critical dates for marketing and communications professionals, color-coded for industry-specific dates and events.

Collaboration Tools

The DTT site doesn't offer formal collaboration tools; instead, users collaborate through the use of blogs, message boards, and polls.

- **Blogs.** The global CEO blog (*Jim's blog*) lets users post and respond to comments to the blog by sending an e-mail to the content editor. The content editor also manages blog subscriptions and sends out an alert when a new blog is posted.

  Another blog, *Bob's blog*, was created by the Global Ethics group to discuss ethical issues through the voice of "Bob," a fictional client service professional. While Bob is not an actual employee, the issues raised in his blog are true to life and elicit many comments from readers. Like *Jim's blog*, *Bob's blog* has a mailbox where readers send comments that are monitored and manually posted to the content page.
- **Message boards.** The Global Clients group created a message board that lets users send e-mails to the content editor to either respond to a thread or create a new topic.
- **Polls.** DTT uses a third-party vendor to host polls on various pages. When users submit a response, they immediately see, in percentage points, other response rankings. "This is a great way for users to feel like they are contributing to the intranet," says Jevtani.
- ***Global Knowledge Management Community Space*.** The *Global Knowledge Management Community Space* provides a clearinghouse of information about knowledge management trends, topics, and best practices. In addition, this homepage can be used to locate other Deloitte knowledge management professionals around the globe—by region or by area of specialty—through a member list and profiles. The homepage includes links to past meetings, with related presentations and recordings, as well as the schedule for future meetings and agendas. The page's *Learning Corner* provides information on upcoming knowledge-management-related conferences and learning opportunities across the globe, with a link to the selected *KM Book of the Month* in digital format.
- **Other communities.** Among the other content and knowledge management communities that are connected through DR sites are the Information and Research Professionals, the Taxonomy Community of Interest, and the Content Managers' Network.

Knowledge Management

The *Knowledge & Research* section in the top navigation bar offers access to key global information and research and knowledge management tools and resources. This section is available to all Deloitte partners and staff, regardless of country or service line designation.

Access to service line or industry knowledge assets is provided via specific portals linked to knowledge repositories managed by dedicated knowledge management teams. In addition, country intranet sites also host country-focused knowledge content in the native language.

Content manager reference materials are available to support all content and knowledge management processes, which are summarized in the *Content Lifecycle Management* guidelines. These guidelines ensure consistency across the various

knowledge management and content management teams, as well as proper confidentiality and risk-mitigation processes.

Data Visualization

Many of the organization's data statistics are confidential and shared only with a select group of people within Deloitte. "Our platform does allow for security groups, so only people with access to certain sites can view the information," says Jevtani. "Every year when member firm revenue results are announced, they are illustrated on a map of the world where users can view population and revenue numbers broken down by region, and in aggregate." This tool is shown below:



Pictured: Data visualization of a specific region's revenue and headcount.

The designers also used dynamic Flash visuals to create interaction for users. Examples include the *World Meeting* page, described above, and the *Global Learning* homepage, which features selected courses in the center of the page. Users can move the slider to scroll through the courses, in a manner similar to iTunes.

LESSONS LEARNED

Following are some lessons learned from key DTT team members.

Tracey Edwards, DTT shared services and chief knowledge officer:

- **Productivity is critical.** "Most Deloitte professionals spend the bulk of their time at client work sites, so they need to utilize the DTT intranet as efficiently as possible. They have to be able to connect to their colleagues around the world quickly and easily, as well as access tools and resources that improve their productivity and add value for their clients. "As a knowledge management platform, the intranet provides a one-stop experience for practitioners to get the information they need to provide excellent client service. Deloitte's Knowledge Exchange is essential to the consulting function's ability to delivery quality client service," she says. "You can put all the bells and whistles you want on an intranet, but it's critical that these resources are easy to use, and help professionals do their jobs more efficiently."

Jan Schaefer, director, DTT Communications:

- **Keep raising the bar and measure the results.** "Our overall communications strategy is to continually improve the quality of what we deliver. So we challenge ourselves to improve the design and content of the intranet. The DTT Communications team does that directly with the sites we own, and we seek to align other communicators by providing guidance and sharing best practices. For example, this year the DTT Communications team delivered a series of regional workshops to member firm content managers, offering practical advice on how to create a compelling intranet. Feedback from participants was very positive. We measure success primary through unique visits, constantly modifying content and design based on user popularity. We also conduct user surveys. For example, a survey of Deloitte member firm staff showed that most preferred to access DTT information online, rather than receiving e-mails. As we prepare to move to a new platform that will allow increased personalization, we hope to evolve into a truly pull communications strategy centered on DR. Soon, we hope to offer the employees of Deloitte member firms an integrated portal with dedicated real estate for member firm, DTT, and regional news. This has the potential to increase readership of DTT news stories dramatically, helping us align global communications with DTT strategy and deliver on our vision to be the Standard of Excellence."

Rachel Flanagan, DR editorial manager:

- **Understand your users' editorial preferences.** "Our homepage metrics increased dramatically after our redesign, based on our new editorial strategy. For example, the average number of visits to our stories has increased by about 150%. We learned, through the metrics, which types of stories were doing well and which were not, plus we devised new ways to get the member firms to pick up our stories and promote our initiatives, such as the CEO's blog."

Karen Frankola, director, internal communications and creative services:

- **Content is at least as important as design.** "The focus of the DTT Communications team over the past year has been more on improving the content of the sites, rather than the design, partly due to lack of a dedicated online designer. We know good design is important, but we think interesting headlines, captivating photos, compelling video, and candid stories built around people are critical. We redesigned our homepage to better showcase the fresh content we have been creating. Every time we build a new site, we try to outdo ourselves, but during the previous year, we had very limited services of a designer. Instead, our small team looked carefully at our metrics, conducted design research, surveyed our users, and focused hard on adding a lot of fresh, compelling content. Now that we've improved our content, we are planning to assess our users and conduct a major redesign before we move to a new platform."
- **A small in-house team can get the job done.** "DTT Communications has only three full-time people to create the homepage and major DTT sites. None of those people are designers. Two team members are under 25, with only a few years' experience. But all three worked extremely hard to make our global intranet compelling and also to promote global content and share best practices with our member firms. They educated themselves and applied limitless energy and enthusiasm to make our intranet relevant to Deloitte people around the world."

RESULTS / ROI

DR, which began as a basic knowledge sharing platform and host for integrated applications, has now shifted to become a center for communications.

The biggest impact the site has made on the organization is that it has encouraged employees to become more involved. The blogs, message boards, and polls have created a more active intranet, moving the dial from a repository to a communication platform.

That focus on communications means that the team has more opportunity to understand, from users, what information is the most valuable to them.

"We often hear from users that there is so much useful information on Deloitte Resources, but it's hard to find," says Jevtani. "Each site owner has taken the feedback into consideration when they update their site. We strive to only post the most useful information on our sites, so that it doesn't just grow as a KM repository."

High-Level Support Means Big Wins

DTT's success results in part from its unique positioning within the organization, and from the organization's restructuring that put Communications under Operations in 2007. "One of the first acts of the Global Managing Partner for Operations was to challenge the Communications team regarding return on investment for its various channels," says Frankola. "The decision was made to discontinue most print communication vehicles. This meant that Deloitte Resources wasn't just the primary internal communications channel for DTT, it was virtually our only channel."

In February 2008, the organization hired a new DTT Communications director—a position that had been vacant since the previous June, when the team was reorganized. Frankola says the new director quickly understood DR's importance to

internal communications, and began working with the director of Knowledge Management to resolve the difficult issue of how to effectively govern the intranet with so many different stakeholders.

In July 2008, the directors of DTT Communications, Knowledge Management, and Brand were officially put in charge of DR, which was previously run by a committee of several dozen people, directed by OIM. "This was a huge win that clearly put the most important business stakeholders as DR's owners," says Frankola.

In addition, she says, "the DTT Communications director created a new position, director of online strategy, to help develop a strategic vision for DR, working in conjunction with the other key stakeholders. Since this position has been filled by the current global Internet director, this move will help connect the global Internet and intranet teams so we can leverage our resources and eliminate duplication of efforts."

Several other staff positions have also been added to the core intranet teams for DTT Communications and Knowledge Management.

All of the changes occurred with the approval of the global managing partner of Operations, which shows very high-level support for DR. In addition, the DTT CEO has said DTT Communications efforts on DR are crucial to communicating DTT's vision and strategy. "So, in the past year, we have been able to dramatically raise the profile of DR among senior leadership," she says.

Adding Value

Several of the site's features have added significant value, including:

- ***Jim's blog*.** One of our most popular initiatives has been our CEO's blog," says Flanagan. "This is the one piece of content that is consistently picked up and promoted by the different member firm editors, so it is truly a global initiative with people around the world reading and commenting on Jim's entries."

  The CEO blog adds value by connecting people of the organization at all levels. Each blog is posted for an average of three weeks (the blog has an irregular schedule; some are up for a week before a new one is posted, while others are up for month). The blog consistently earns approximately 10,000 visits (in a three week period). This is significantly more traffic than any other piece of content. And some of the posts receive more than 50 comments.

- **DR homepage.** "The enhanced Deloitte Resources homepage has added tremendous value to Deloitte's communications by providing original, timely news stories—not only for readers on the global site, but for all member firm sites," says Jill Brower.

  DTT content writers create story "packages" that include original content, photos, and relevant links. Because each story is pre-packaged, editors on other sites can pick up the stories wholesale and feature them on their own sites. "So, even if member firm people are not navigating to the global homepage themselves, they're still reading our content on their own homepages," she says. "This ties back to the role of DTT Communications as setting the standard and providing best practices for other member firms."

  To push the stories out to the member firms, they include a *Deloitte Resources newswire* section in *Green Dot*, a monthly newsletter that goes out to all Communications, Marketing, and Brand professionals. The *newswire* includes a list of headlines and links to the most recently published stories on

the Global DR site to encourage other member firm editors and content managers to republish on their own sites (all of which is done seamlessly on the DR platform). "This allows other member firms to either use the stories wholesale or to localize them to their specific community," says Brower. "We also tag the links in the *Green Dot* so we can see how much traffic is coming from those links."

- ***Deloitte TV Network*:** The *Deloitte TV Network* makes videos created by both DTT and member firms accessible to every Deloitte employee globally. "For example," says Frankola, "in previous years, we posted video highlights of the World Meeting only on our *World Meeting* site, but a few months later, no one visited the site and no one could readily find the videos."

  Deloitte TV also provides a "one-stop shopping" experience for multimedia so the firm can get more use of the content than just playing a video once at a conference. And, in addition to expanding the reach of video assets created for a single purpose, the TV Network also can potentially save the firm valuable time and money by cataloging existing videos.

  "Videos are expensive," says Frankola. "If a member firm is planning its own partner meeting, a communications professional can visit the site and see what kind of videos are available. The firm can show one of the videos already made or even obtain footage from DTT Communications to customize the video for their own meeting."

  Deloitte TV has been so successful that other member firms are now creating their own *Deloitte TV* sites.

Metrics

"Since redesigning the Global Deloitte Resources homepage and putting more attention into the intranet as our primary communications vehicle, we have seen increased metrics across the board," says Brower. She cites these examples as evidence of these gains:

- Homepage visits increased by 136% between June 2007 and June 2008.
- The average number of visits to feature stories has increased by approximately 150%.
- For the *World Meeting* site, they saw a 200% increase in visits to the 2008 homepage versus the 2007 page.

Also, the team went from publishing virtually no original stories on the homepage to now publishing eight to 12 new stories monthly.

HSBC Bank Brazil

Using the intranet

HSBC Holdings plc serves over 128 million customers worldwide through approximately 10,000 offices located in 84 countries and territories. With assets of US$ 2.5 billion (2008), HSBC is the world's largest company according to *Forbes* (2008) and the most valuable brand in the financial industry according to *The Banker* (2008). HSBC Bank Brazil is an HSBC Group subsidiary. With its headquarters in Curitiba (state of Paraná), HSBC Brazil has 26,530 employees at 2,300 locations in 565 cities across the country.

Headquarters: London (global HQ); Curitiba, PR (Brazil HQ)

Number of employees the intranet supports: 30,000 users; 26,530 employees

Sales: HSBC Brazil has profits of R$1.24 billion (approximately US$ 775 million).

Design team

In-house: approximately 10 people. TerraForum supported all the strategy definition and implementation (IA, layout, content, governance definition, and SEO). Midia Digital provided customized CMS templates.

Members

HSBC Brazil: Juliana Marques, internal communications director; Luciano Miranda, intranet manager; Daniel Machado, head of IT; Demerson Comin, manager; Denise Shibata, intranet IA and design coordinator; Fernanda Santos, intranet content coordinator; Edilson Fontenele, IT project manager responsible for the intranet implementation in IT; Luiz Prohmann, IT manager; Maura Kuniyoshi, IT analyst; Luiz Zimmermann, IT analyst; Gustavo Nadaline, IT analyst; Gilmar B. Soares, IT analyst; Clesio Ramos, IT Coordinator; Daniel Machado, head of IT e-channels; Luis Bresolin, IT Analyst; Luiz Suckow, relationship manager technical services.

TerraForum: José Claudio Terra, CEO; Carlos Franco, partner; Paulo Floriano, project manager; Ricardo Schoueri, partner; Marcelo Barbosa, IA specialist; Denise Pithan, taxonomy and usability specialist; Alício del Nero, IA specialist; Grácia Anacleto content management and Web writing specialist; Suzana Ribeiro, content management and Web writing specialist; Alex Sanghikian, Web writing specialist; Giorgio Dal Molin, Web writing specialist; Stella Wilderom, Web writing specialist; Priscilla Fogiato, Web writing specialist; David Kato collaboration specialist; Eric Boldrin, collaboration specialist; Julio Bittencourt, designer; Vivian Pereira designer; Thiago Padula, designer; Lilian Nosralla, designer; Rodrigo Domingues, IT specialist.

Midia Digital: Carlos Eduardo de Souza, HTML developer; Felipe Gomide, IT manager; Gustavo Straube, Java developer; Lucas Rafael de Almeida, IT analyst; Tiane Yumi Yamaguchi, IT analyst.

SUMMARY

The HBSC Brazil intranet supports approximately 26,000 employees in Brazil. Given that they're all local, this might not seem like much of a challenge, but the users are located in 565 cities across Brazil, so communication is key. And the HSBC Brazil intranet is a showpiece for communication.

The homepage is full of features that can help employees keep on top of the news and perform their everyday work tasks. The left-most column is about informing people, with important recent news appearing in the upper left area of the column.

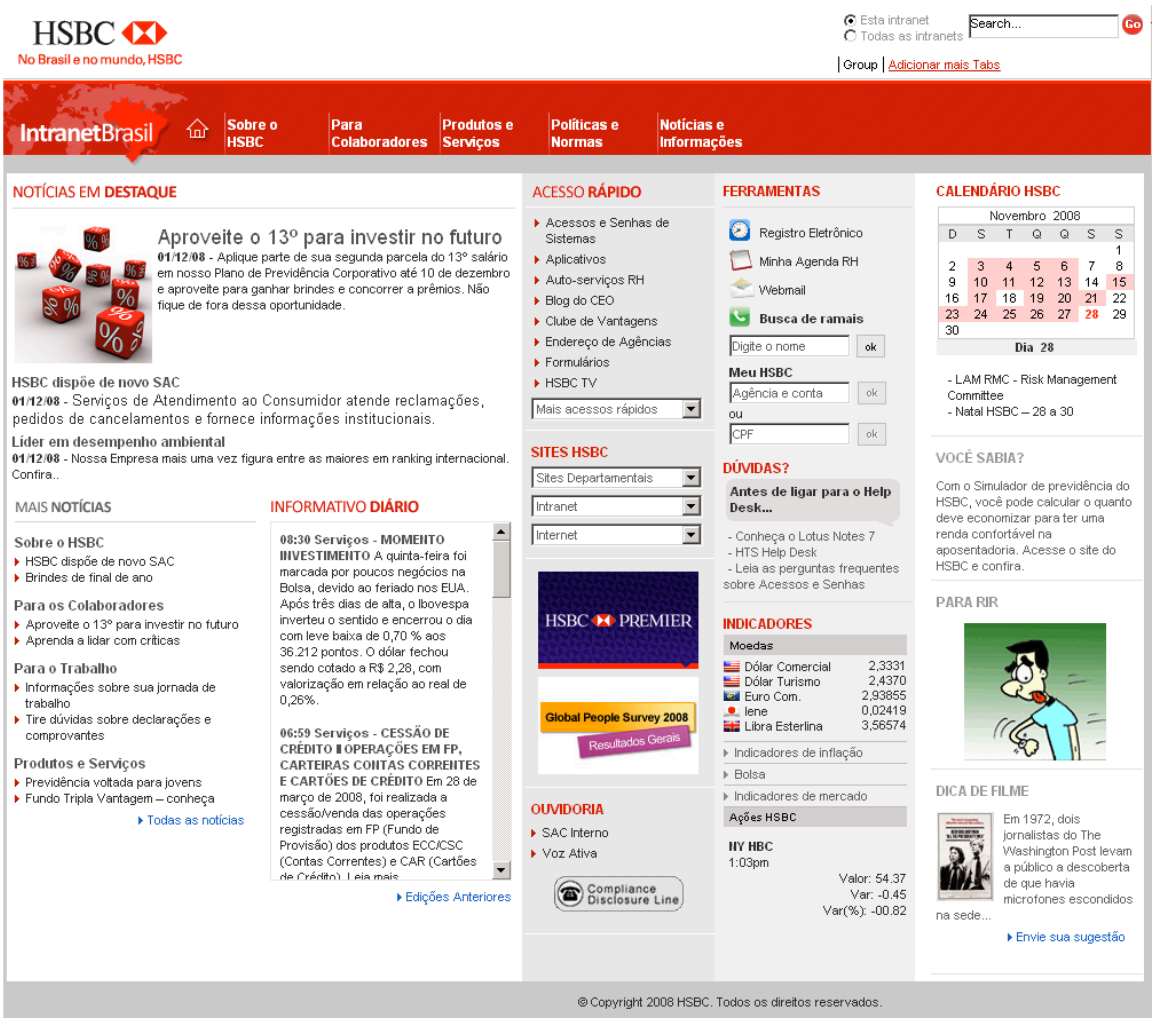
The second column is about important tools at the organization. The *Quick Access* (*Acesso Rápido* in Portuguese) in the middle of the homepage lists popular links. The *Index* (*Indicadores*) section shows the value of various currencies by country.

The third column houses information that is more personal to the individual user. The *Tools* (*Ferramentas*) section lets people tackle various personal tasks, such as view their time-off schedule or calendar and work with Webmail. Users are also offered a poll or a quiz on the homepage (*Eleição PPR - Participe!*). The first line, *Your vote is very important* (Seu voto é muito importante), encourages participation.

The right-most column of the homepage balances with the left-most column, also offering news—but this area's information is less urgent in nature. The corporate calendar appears in the upper right part of the page. There, users can click through

to see events and holidays that are important for the organization. The *Did you know?* (*Você sabia?*) section offers helpful tips about using the intranet, along with tips about products, employee perks, and facts about the organization. For example, the current blurb featured on the homepage tells people to look in the *Noticias e Infromacoes* section for useful online services. Underneath this, for comic relief, a *Peanuts* cartoon gives the thought of the day (in one, Sally talks to Charlie Brown about whether she looks okay to get her picture taken with Santa Claus).

Other information in this section might include: "Did you know that HSBC is the most valuable brand in the world?" or "Did you know that employees have special fees on car insurance?"



Pictured: The homepage of the HSBC Brazil intranet gets users started right away, offering news and links to various tools and calendars.

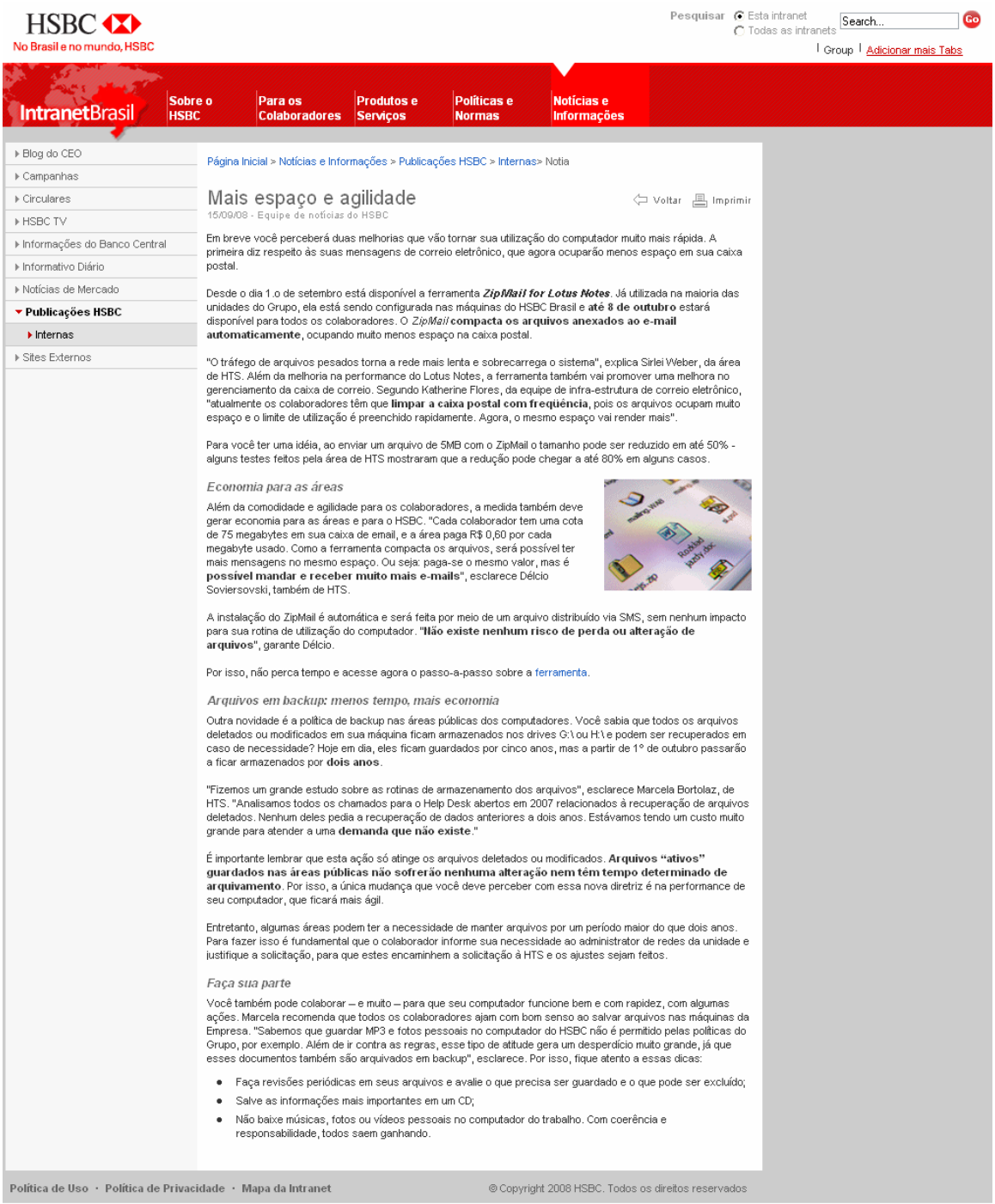
COMMUNICATION

The *News and Information* menu (*Notícias e Informações*) leads to many features that keep employees abreast of recent happenings. This is a great communication area on the HSBC Brazil intranet, offering links to the following features in the left-side navigation:

- The CEO blog
- Campaigns
- Circulars
- News clippings
- HSBC TV
- Information from the Central Bank
- Daily information
- Financial market news
- HSBC publications
- External sites

Each day, at least three new articles are published in the site's news area, covering the day-to-day happenings at HSBC Brazil. To garner new stories, the eight team members who manage this section talk to employees, collecting their opinions, cases, and stories.

Items in the news section on the HSBC Brazil intranet are sorted and categorized using themes similar to those in the main navigation, including *About HSBC* (institutional news), *To Employees* (HR News), *To Work* (administrative news), and *Products and Services* (financial products and market news). Employees can choose from these to view news of interest.



Pictured: A news item, *More Space and Flexibility* (*Mais Espaco e Agilidade*), from the *Internal Publications* section. Users can choose categories and types of news sources.

Additionally, HSBC retains a news clipping services to scout out news articles on the Web that might be of interest and helpful to HSBC employees. Users can search for keywords using the open *Search* (*Pesquisar*) field. They can also sort by one of the offered categories, for example: *HSBC Insurance* (*HSBC Seguros*), *HSBC Investments*, and *Contents of the Day* (*Conteúdo do dia*).



Pictured: A news clipping services finds items from all over the Web that might interest or assist HSBC employees.

On a more personal note, the CEO's blog page has a history of success. In 2005, when CEO blogs were not prevalent, then-president Emilson Alonso created a blog to communicate to his employees more effectively and to invite their feedback. The initiative was a success and has been continued by current CEO Shaun Wallis. Since 2005, more than 200 articles and 8,000 comments have been posted, and the page has been viewed more than 2,000,000 times. Today, this feature has 76,000 views per month—not bad for an intranet that supports about 26,000 users.

As for the design, it's simple and traditional. The latest posting takes up the bulk of the page. A nice picture of the CEO appears at the top along with his name, personalizing his comments. Links to past blogs, and a place for people to comment, appear on the right side of the page.

All the employees are welcome to participate (assuming they accept the terms of use). Like most CEO blogs, all comments on HSBC's CEO blog include the poster's name.

The blog entry itself is short and understandable. Notice that the example entry, which appears below, fits entirely above the fold. Keeping the writing short and concise like this is always a good thing, and it increases the chances that people will actually read it. The call to action in Wallis' post is not hidden in a lot of discussion. Rather, the point he makes is succinct and obvious: he's urging employees to participate in a company-satisfaction survey. A loose translation of his message from Portuguese to English appears below:

> *"Todo ano realizamos uma pesquisa com nossos colaboradores para descobrir o que precisa ser melhorado."*
>
> ***"Every year we conduct a survey with our employees to find out what needs to be improved."***

"Ano passado, a pesquisa foi aplicada em 82 países e o Brazil teve um dos maiores indices de participação (97%) e um razoável indice de engajamento (67%)."

"Last year, the research was applied in 82 countries and Brazil had one of the highest rates of participation (97%) and a reasonable level of engagement (67%)."

"Subsequentemente, todas as áreas do HSBC se reuniram, discutiram os resultados e acordaram um plano de ação."

"Thereafter all areas of HSBC met, discussed the results and agreed on a plan of action."

"Espero que todos se lembrem dos resultados, tanto dos bons quanto não tão bons, e que saibam o que aconteceu desde então."

"I hope that everyone remembers the results, both the good and not so good, and they know what has happened since then."

"Houve muitas ações tanto no HSBC como um todo, quanto nas áreas individualmente - todas com o objetivo de fazer de nossa empresa um lugar melhor pare todos nós."

"HSBC itself and all the areas of the bank are invested in actions directed toward making the company a better place."

"A pesquisa deste ano comeca em 15 de julho e eu espero que todos participem."

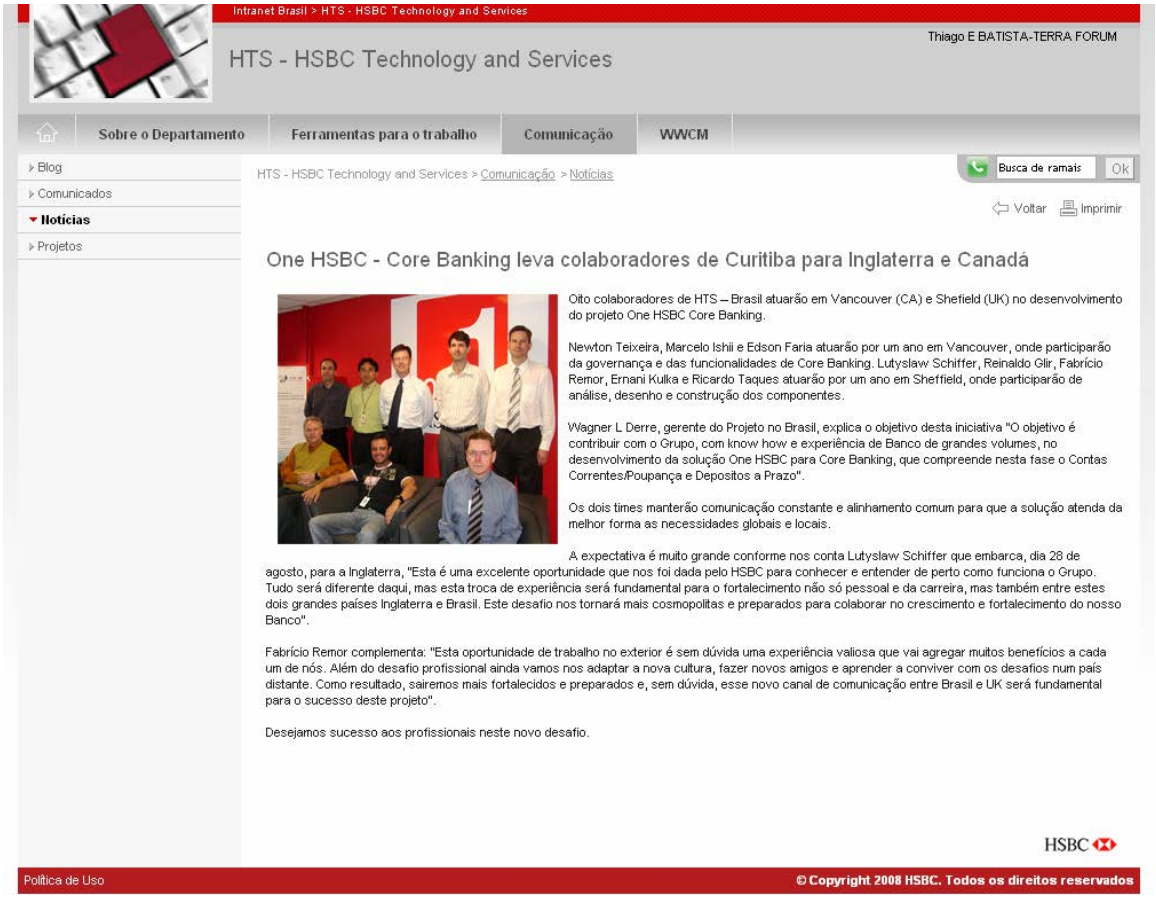
"This year's research begins on July 15 and I hope that everyone will participate."



Pictured: The CEO's blog page shows the latest posting, a nice picture of the CEO, links to past blogs, and a place for people to comment.

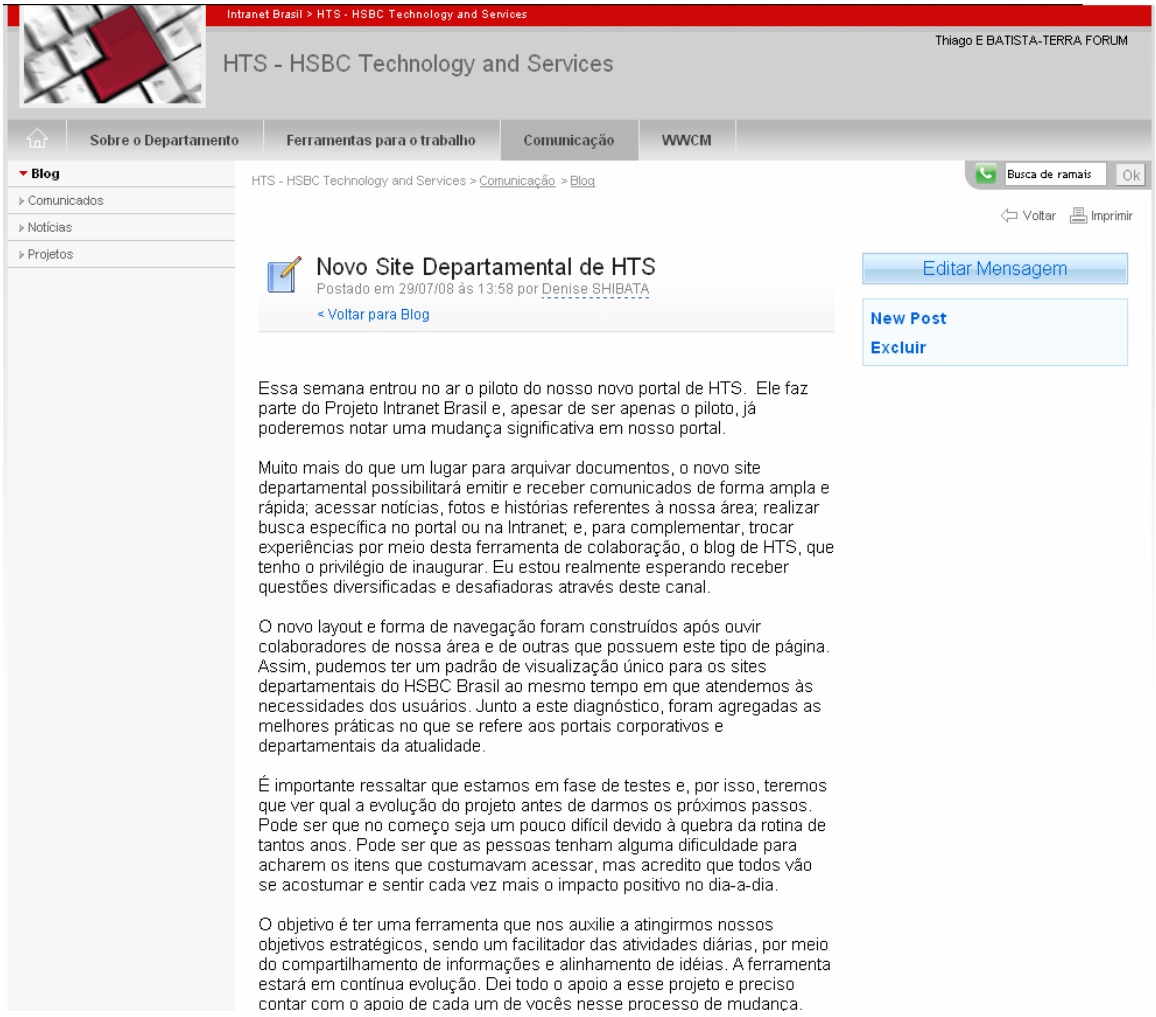
10 Best Intranets: HSBC Bank Brazil

Another way to share information with peers is through the various departmental sites on the HSBC Brazil intranet.



Pictured: The department page for HTS–HSBC Technology and Services makes information about projects, teams, news, and more available together in the same place.

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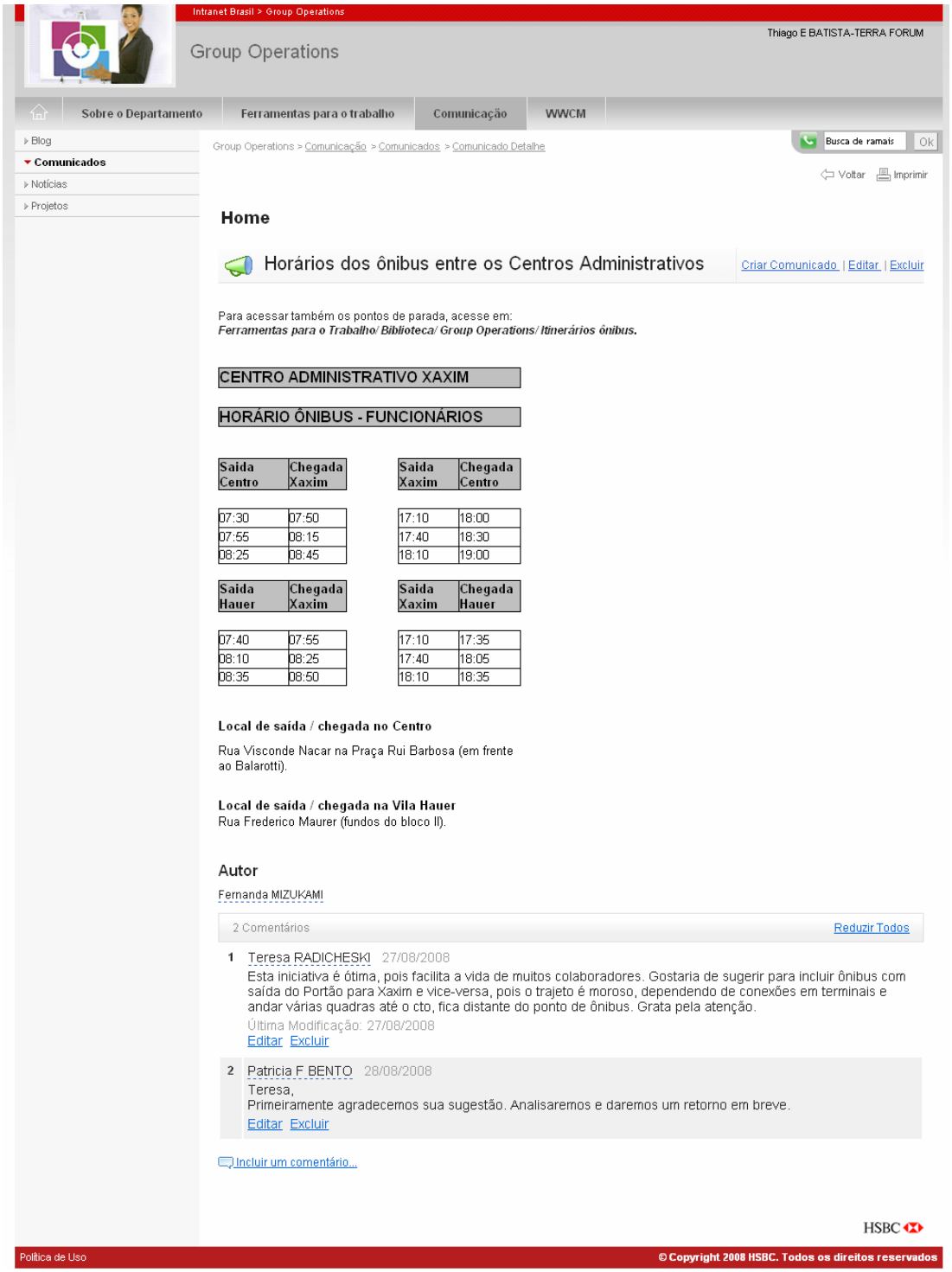
Pictured: In addition to the CEO's blog, departmental sites have blogs published by each department's director.

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Pictured: Discussion forums on the departmental pages let people weigh in on various topics.

Additionally, project members can publish announcements about operational issues and more urgent matters. Such announcements posted on project pages can be commented on and further discussed by their peers.



Pictured: Announcements are posted on departmental sites and users can comment on them. Department sites also feature a document library.

HSBC Brazil also links to the main HSBC TV station. At any given time, employees can choose from more than 100 episodes to watch. The TV station's interface offers tabs to make it easy for users to find the right information. *Playlist* offers a schedule for the week, and users can add their own playlists via a sub-tab. The *Program Guide* lets users look at programs by various categories, and *Search* lets them look for specific keywords.

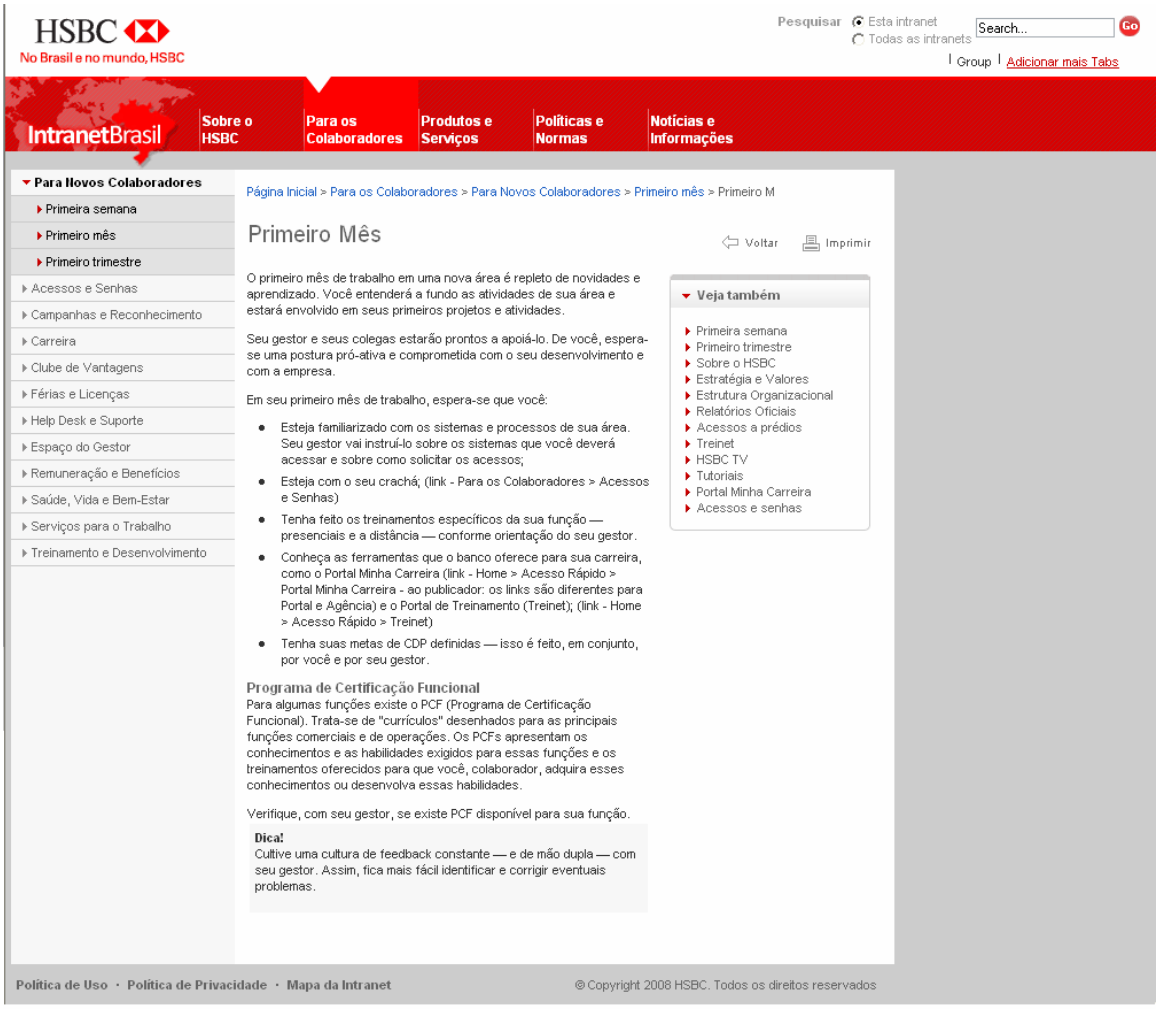


Pictured: The HSBC TV channel offers more than 100 shows for employees to watch at any time. Simple tabs and search help people find the information they want.

The intranet's *For Employees* section (*Para os Colaboradores* in the second global navigation tab), houses important information about working at HSBC. For example, some menu links include *For New People* (*Para Novos Colaboradores*), *Access to Passwords* (*Acessos o senhas*), *Career* (*Carreira*), and *Benefits* (*Clube de Vantagens*).

Helping new employees get started is necessary, but can be time-consuming. Companies must make new employees feel welcome and be productive quickly. On the HSBC intranet, the section for new hires does this, mapping things out for new employees based on their tenure. The secondary left-hand menu includes the following selections: *First week* (*Primeira semana*), *First Month* (*Primeiro mês*), and *First Quarter* (*Primeiro trimestre*). Information and steps for new employees to follow

are located in these sections. Housing this information on the intranet makes it easy for new hires to trust, follow, and feel confident with consulting.

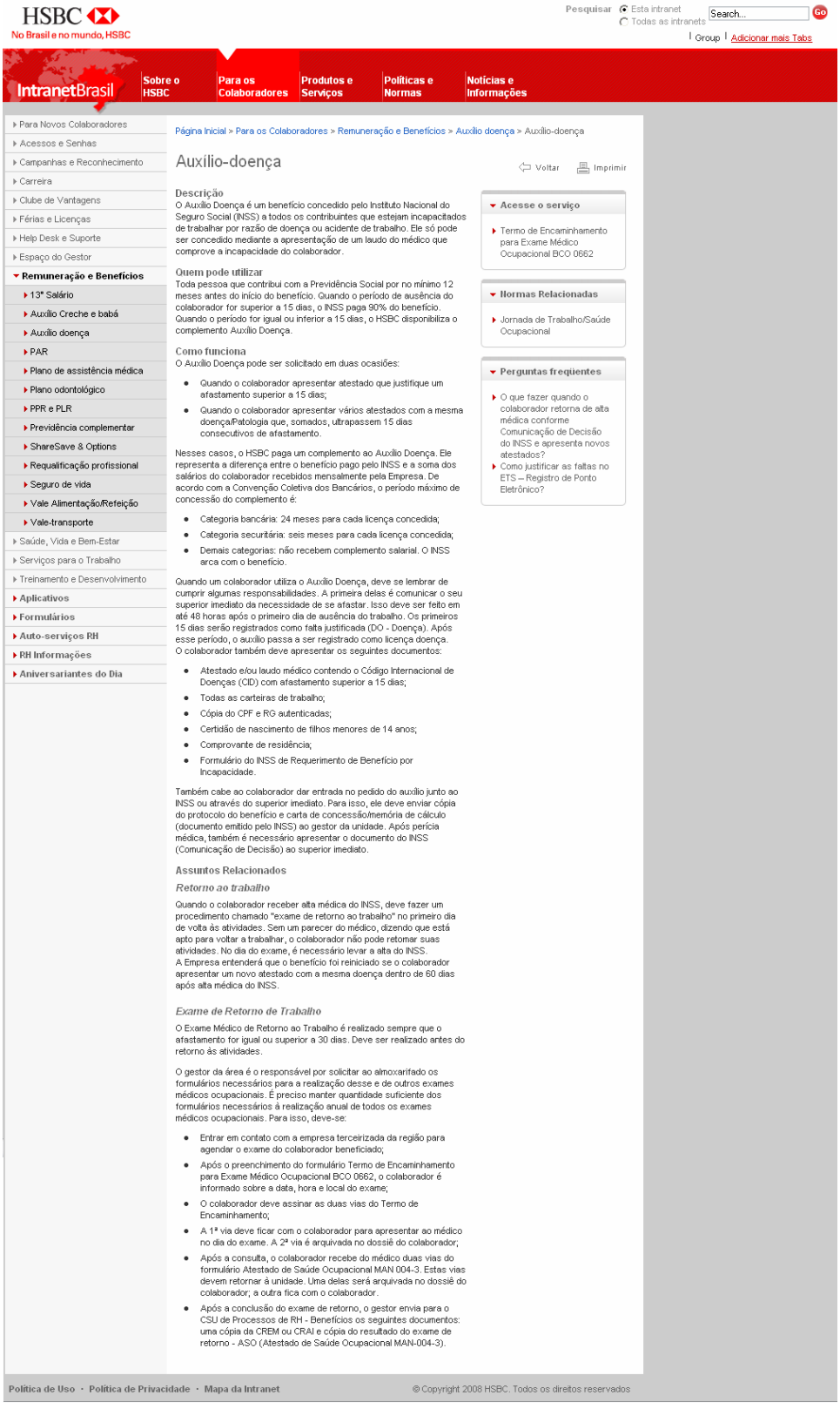


Pictured: The section for new hires helps them through the initial tasks at HSBC, right through their first quarter of working at the company.

The *Service's Quick Guide* is a template used for the compensation and benefits section (*Remuneracao e Beneficios*) that brings together all of the information needed about HR and administrative services available to employees. It's a one-stop-shop for related information such as policies and procedures, contact information, and frequently asked questions. Users can navigate through the titles using the following simple anchors: *Summary*, *Service Description*, *Who can use*, *How to proceed*, and *Contact and support information.*

The cross-navigation area appears on the right side of pages and includes *See Also*, to access related content; a *FAQ*; and *Related Policies and Procedures.*

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Pictured: The *Service's Quick Guide* brings together all of the information needed about HR and administrative services.

Mission Critical Information

Especially in today's financial climate, the information that the HSBC Brazil intranet provides must be the same across branches, and be easy to digest and communicate to customers and potential customers. One of the intranet team's objectives was to bring together all of this information to expedite processes and keep employees well informed with accurate, clear information. This is important because the people who use this information are mostly branch employees who are distributed across many (2,300) locations. The *Products and Services* (*Productos e Serviços*) tab puts together the plethora of offerings that HSBC Brazil employees must understand, support, and sell.

All of the bank's products are available on the intranet. The left-side navigation encapsulates links to the main areas of products and services, such as *Exchanging Monies* (*Câmbio*), *Capitalization* (*Capitalização*), *Credit Cards* (*Cartões de Credito*), and *Loans and Financing* (*Empréstimos e Financiamentos*). Once users choose a category, they can choose a tab that corresponds with their task.

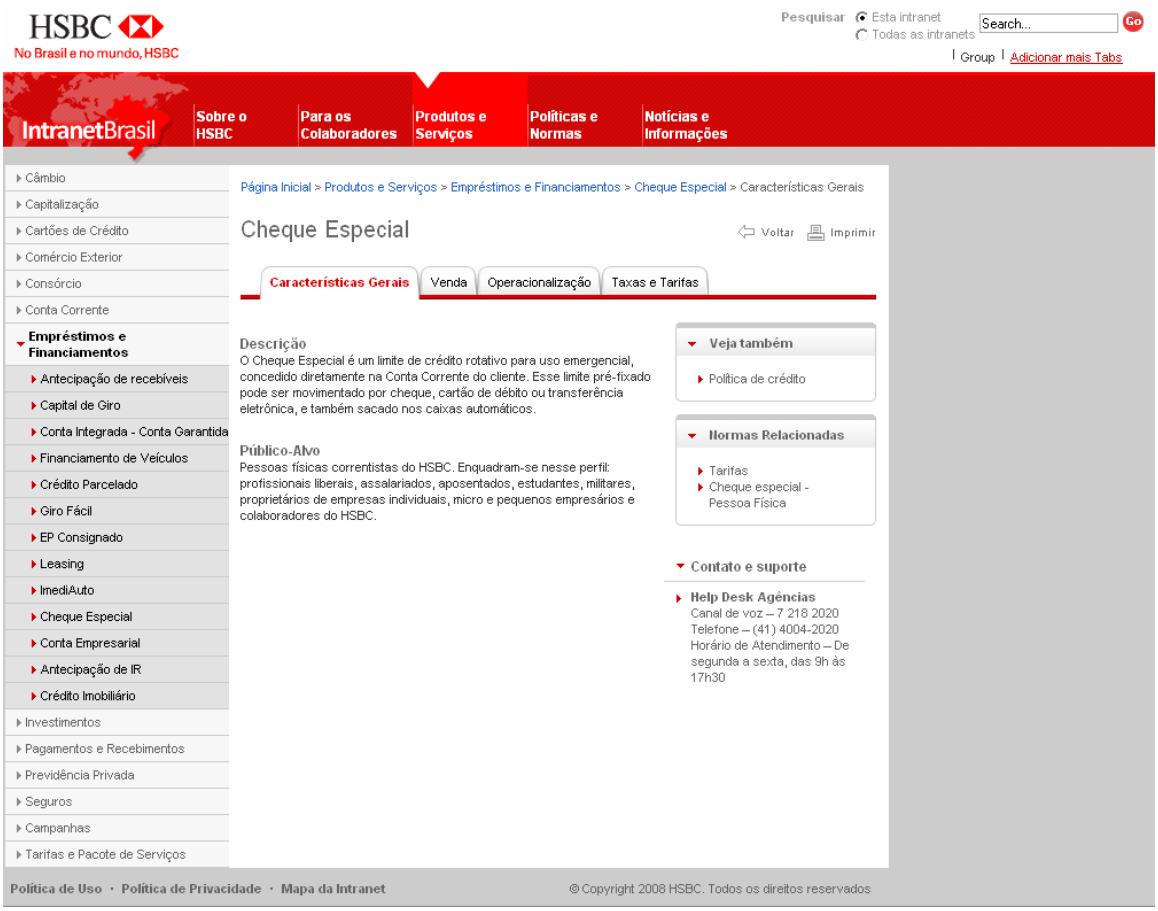
These tab choices include *General Features* (*Características Gerais*), *Selling Information* (*Venda*), *Operationalization* (*Operacionalização*), and *Rates and Fees* (*Taxas e Tarifas*). The tabs reflect the branches' processes in chronological order as they are completed or investigated.

One of the intranet designers' goals for this template was to refer people to related information such as product procedures and available training materials for the product. In this case, the template does just that. On the right side, people are directed to more information that will help them better understand the offering, with *See Also* (*Veja Tambem*) and *Related Content* (*Normas Relacionadas*). Employees can also refer to related forms, related policies and procedures, available training material, contact information, and support for more help.

When tabs are selected, they're brought to the fore and the text color changes from black to red. The design makes it easy to move between the four tabs that summarize all the points about the product.

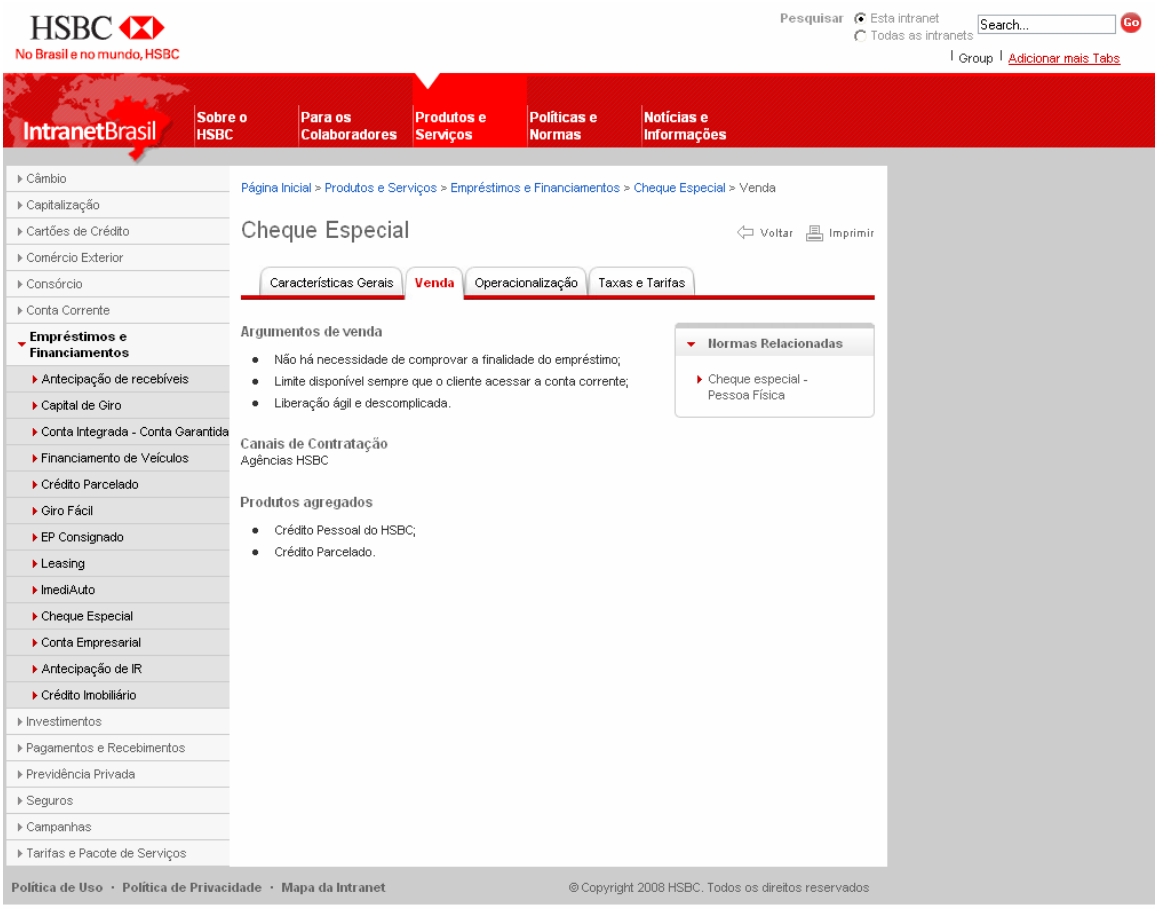
In the example below, the *Cheque Especial* page gives a short description of the offering. To help target sales to the right people, the page also has a *Target Audience* (*Publico-Alvo*) section. ("Cheque Especial" is a pre-approved limit on one's account.)

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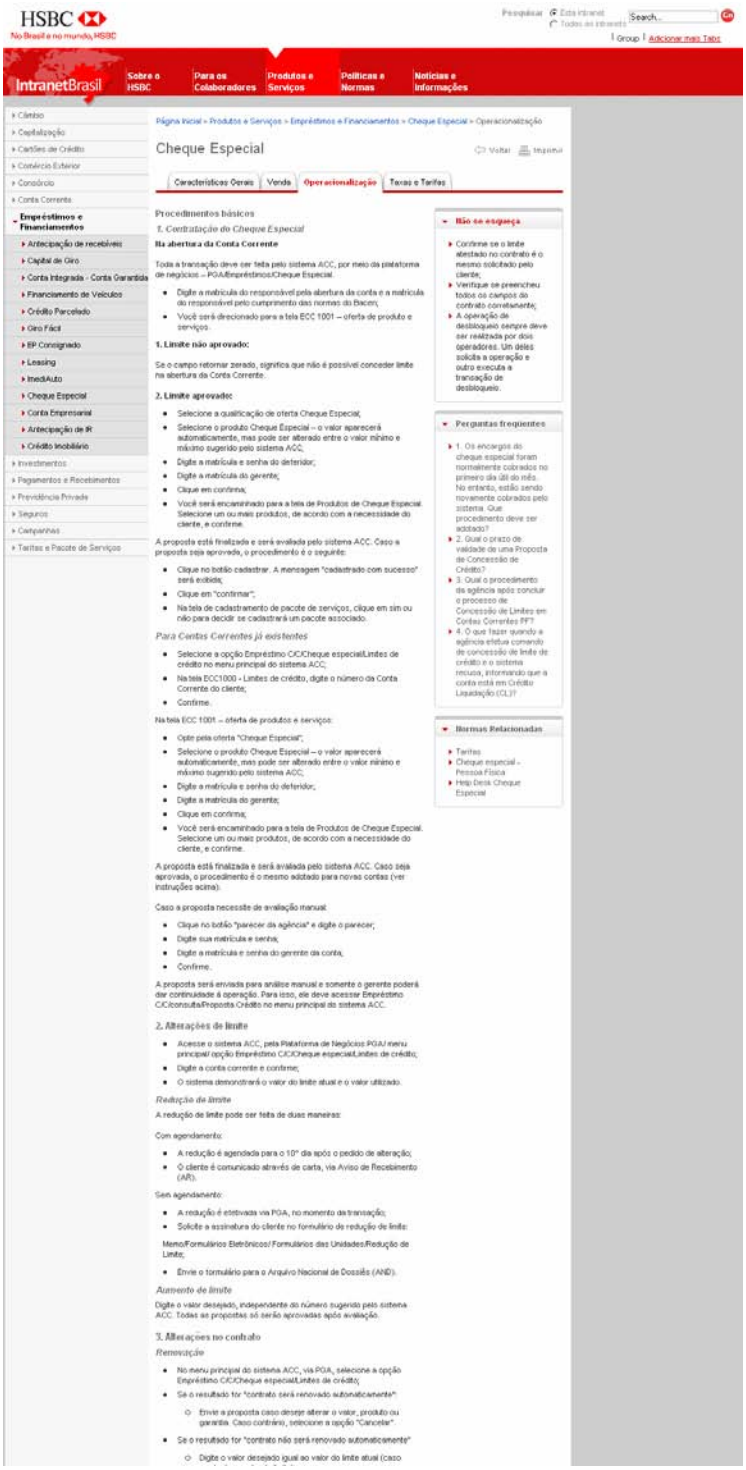
Pictured: The *Cheque Especial* page gives a description of the offering and a *Target Audience* (*Publico-Alvo*) description on the *General Description* tab.

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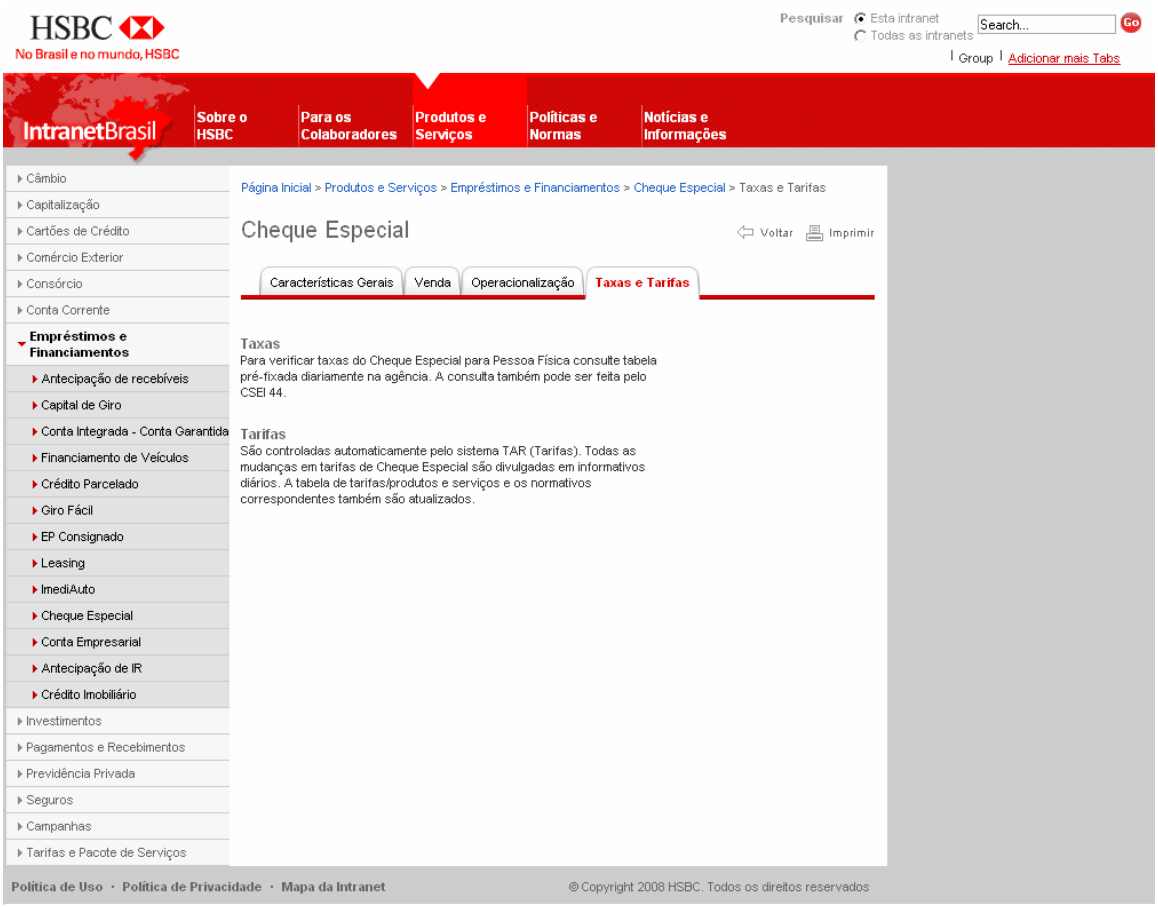
Pictured: The *Selling Information* (*Venda*) tab gives information about how to market and sell a particular product. Headings entitled *Reasons* (*Argumentos de venda*), *Channels* (*Canais de Contratação*), and *Related products* (*Produtos agregados*) summarize important sales points. This screen illustrates general characteristics of the product's *Quick Guide*.

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Pictured: Although long, the *Operationalization (Operacionalização)* page provides users with step-by-step instructions on how to operationalize the selling of the product. The users also have a summary of important things to remember (*não se esqueça*, in the left corner).

10 Best Intranets: HSBC Bank Brazil



Pictured: The *Rates and Fees* (Taxas e Tarifas) section tells employees some of the tax and fee ramifications of the offering. The text is short and simple.

The intranet designers set themselves several goals, one of which was to improve relationships with clients. Intranet sections such as the ones above help employees quickly find, trust, and understand all of the information about the organization's products and services. They can therefore confidently and speedily sell the product—and answer any customer's questions—which inevitably improves relationships.

The intranet also includes a large library of reference materials to help employees find as much up-to-date information on topics as they need. People can find information using the search function or look for topics using the alpha list.

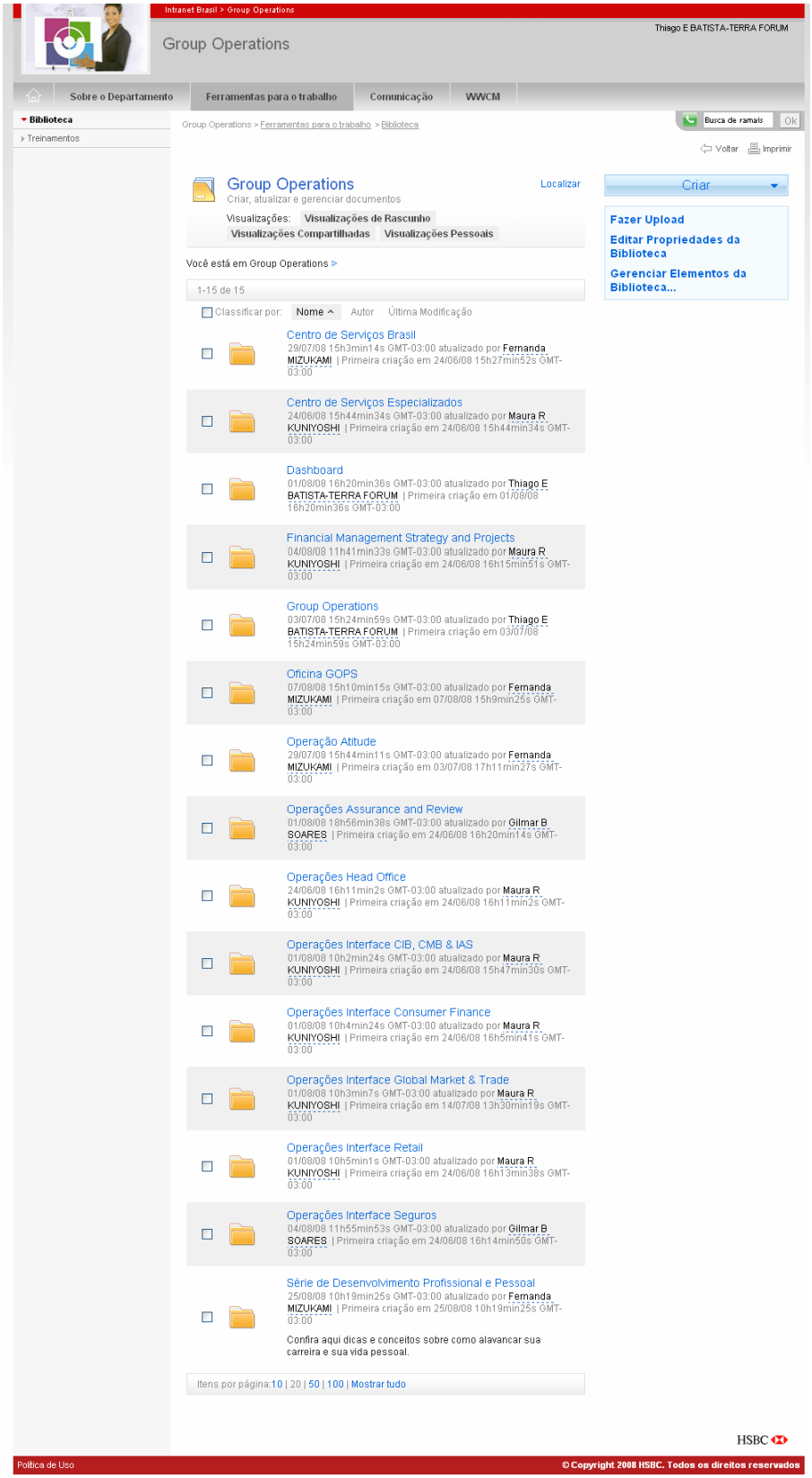
10 Best Intranets: HSBC Bank Brazil



Pictured: This glossary is available within the virtual communities.

Also, for more targeted information, departmental areas of the intranet have their own document libraries.

10 Best Intranets: HSBC Bank Brazil



Pictured: A department area's document library.

10 Best Intranets: HSBC Bank Brazil

The communication vehicles on the HSBC Brazil intranet help employees feel heard, and remind them that they're part of a large but still cozy community at HSBC Brazil and HSBC as a whole. The information about products and services is so tightly written and consolidated that employees can't help but be stars with their customers. The HSBC Brazil intranet does a great service for employees and clients alike.

BACKGROUND

HSBC Brazil's current intranet is a result of a redesign project that began in late 2006. By beginning with a diagnostic phase, the team quickly realized that they could increase user satisfaction by simply implementing changes to the homepage layout. So, that's where they began. Initial changes to the homepage resulted in user satisfaction scores jumping from 84 to 93%.

This improvement was measured through an annual quantitative research study conducted by the company to evaluate the effectiveness of internal communication vehicles. The study included approximately 3,000 respondents.

The first part of the redesign—and the core of the project—took place throughout 2007 and included major changes to the site's layout, content, IA, search, and CMS platform.

Originally, the site was a static HTML design. As part of the redesign project, a custom CMS was built and the site's content was migrated into the new system to create a more dynamic environment.

At the end of 2008, the second phase of enhancements were completed, included collaboration spaces (department sites and virtual communities), a technology migration to IBM Websphere Portal, and a content migration to IBM's Websphere Web Content Manager (WWCM).

"We adopted this approach because we had to show results very quickly, and we realized that the biggest change that will impact directly the company and intranet's results was related to content, information architecture, and governance, instead of technology," says Carlos Franco, TerraForum partner and one of people responsible for this decision.

"So we prefer to use a simpler tool that would give us more flexibility and agility at that time of the project, instead of implementing a more robust tool where we would need better servers, bandwidth, and the team would need to gain the technical skills to implement it," he says.

INTRANET TEAM

The redesign project included a component to address site ownership. During the project's initial phase, project governance was moved from the E-Business group—a combination of intranet and Internet resources—to the Internal Communications department. This governance change was, in fact, the project's first outcome.

"By defining the governance structure, we could articulate the involvement of the necessary resources: from committees to tactical and strategic decisions, IT operational team, the business operational team, and so on," says Juliana Marques, director of Internal Communications and the primary person behind the project. "This happens at every company, but within a bank, if you want the commitment of people, you need to formalize all the roles and activities."

10 Best Intranets: HSBC Bank Brazil



Pictured: The HSBC intranet team (top left to right): Tiago Saturnino, Edilson Fontenele, Luiz Zimmermann, Bianca Zanardi, Paulo Floriano, Thiago Stefani, Clésio Ramos, Everson Reis, Luiz Prohmann; (bottom left to right): Juliana Marques, Tiane Yamaguchi, Luciano Miranda, Suzana Ribeiro, Giorgio dal Molin, Priscilla Fogiato, Fernanda Santos, Gilmar Soares, Maura Kuniyoshi, Denise Shibata, Gustavo Nadaline.

The current team structure includes five people on the business team:

- Intranet strategic manager
- Intranet tactical/operational manager
- Information architecture and design coordinator
- Content coordinator
- Intern

In addition to these staff roles, the intranet also has seven people responsible for managing news on the site (two HSBC employees and five from TerraForum).

The IT team resources for the intranet consist of one staff manager, one project manager, and three IT analysts.

A strategic committee is involved in intranet projects to evaluate the big picture decisions about the site. The intranet team reports on progress toward goals and reports site metrics to this committee. A tactical committee handles the tactical decisions of the portal (such as budget) and comprises heads of the main areas of the company.

Using Agencies

Some companies rely on outside vendors to supplement their own staff; HSBC, like many others, relied on agencies to provide skills that would augment their own staff's expertise. The site's design and content are outsourced to one outside agency, while another agency handles the planning, writing, and publishing of the site's news sections.

The intranet team at HSBC Brazil relied on TerraForum for their expertise and experience planning large-scale portal projects. The agency had a proven methodology for the planning and implementation required for this type of project. TerraForum worked on both phase I and II, providing the business case and conducting user research activities (interviews, card sorting, heuristic evaluations, maturity analysis, governance definition, and so on). During phase II, TerraForum worked with HSBC on all deliverables: IA definition; governance refinement; SEO; layout definition; policies and standards definition; and content strategy, development, and publishing.

Two additional agencies also contributed to the effort. Mídia Digital was responsible for developing the customized CMS templates (phase I), and BRQ, an IT company, was responsible for the technical configuration of Websphere, Quickr, and WWCM, including customization and installation (phase II).

This use of multiple agencies is not uncommon for these types of large-scale portal implementations. Indeed, it's becoming standard practice to engage several vendors to plan and execute project deliverables according to their various areas of expertise.

TIMELINE

HSBC's portal project is an ongoing initiative, with an expected completion date of 2010. The redesign project, covered in detail in this report, took approximately one year to complete and included the following project milestones:

HSBC PORTAL PROJECT MILESTONES	
Date	**Milestone**
November 2006	Beginning of intranet diagnostic and business case development.
May 2007	New homepage layout design.
August 2007	Beginning of phase I implementation, including IA, content planning and development, layout, and search engine optimization (SEO).
December 2007	Go live of phase I.
January 2008	Beginning of phase II, including IA, layout, content and governance revision, planning and implementation of collaboration spaces (virtual communities), and departmental sites.
July 2008	Implementation of collaboration pilot (two departmental sites and two virtual communities).
August 2008	Collaboration rollout (more departmental sites and additional communities).
December 2008	Go live of new platform (Websphere Portal); all content migrated to IBM WWCM.

January 2009	Beginning of Phase III Phase III and Phase IV, will consist of implementing features to support competitive intelligence, innovation, the development of online tools, and the improvement of actual features like people search, remote access, applications, and forms. These phases are also intended to execute more sophisticated concepts, including customization, content personalization, and accessibility.

GOALS AND CONSTRAINTS

The overarching goal of the portal project, called "Portal Intranet Brazil," is to transform the organization's intranet into a comprehensive intranet portal that will closely align with the company's business objectives. As such, the company established the following business goals for the project:

- Improve employees' satisfaction in working at HSBC Brazil
- Reduce costs and increase productivity
- Improve relationships with clients
- Increase sales

To accomplish these broader strategic objectives, the intranet required improvements in several key dimensions, including:

- IA (taxonomy, templates, navigation)
- Governance
- Layout
- SEO
- Content strategy (including developing and publishing)
- Policies and guidelines definition (editorial, design, and Web writing)

According to Luciano Miranda, the intranet manager, the project has already shown measurable success on the following objectives:

- **Be the most useful working tool for HSBC's employees**. The HSBC Brazil intranet is the most accessed intranet in the entire HSBC group: 97% of people access the intranet at least once per day.
- **Provide accessibility from any place and any communication device** (including mobile phones, palm devices, and notebook computers). Today, the top 500 executives have intranet access available from their smartphones.
- **Leverage corporate intelligence and the knowledge sharing.** The intranet currently has more than 1,000 pages with relevant content to help people do their jobs.
- **Improve internal communication.** During the user research after launching the redesign, the intranet was elected the preferred internal communication vehicle and rated first on relevancy, quality, agility, and credibility.

USERS

HSBC intranet users span the following groups:

- **Business unit professionals** use the intranet to assist with management, planning, corporate intelligence, marketing, HR, finance, and other functions.
- **Branch professionals** are responsible for selling, prospect and client services.
- **Back-office professionals** are responsible for products operations.
- **Outsourced professionals** have restricted intranet access.

Other HSBC employees worldwide have access to HSBC Brazil's intranet from their own units in other countries.

USER TASKS

The new HSBC intranet supports a variety of mission-critical user tasks. Among the most significant are the following:

- **Lines of business support.** Users have full access to the most relevant product information, including products' characteristics, audience, and selling points; comparisons with competitors' banks; taxes; financial market; and operational procedures. The primary objectives behind this service were to improve competitive advantage, increase sales, and reduce internal help desk calls.
- **HR services.** Most existing HR services are available via the intranet, including reviewing and requesting vacation time, accessing payment extracts, and reviewing and requesting corporate benefits. Today, all 27,000 employees are strongly encouraged to access these services online. The main goals behind this employee self-service are to reduce internal help desk calls and increase employee productivity.
- **Administrative services.** There are approximately 50 administrative services available on the intranet, including scheduling travel (11,000 users access each month), requesting supplies (5,000 users access each month), and scheduling meeting rooms (6,000 users access each month). Most users have online and self-service access to these services. The main goals behind them are to reduce internal help desk calls and increase employee productivity.
- **Communication.** The intranet has many tools that speed up communication between managers and employees—a crucial issue, given the company's geographic distribution. These communication tools include:
    - Web-based internal TV with a weekly schedule and more than 100 episodes available on demand
    - Corporate announcements
    - Corporate agenda
    - News
    - The CEO's blog
    - News clipping to provide employees access to relevant external news

- **Policies and procedures.** The site provides 4,000 pages of global and 60,000 pages of local policies and procedures.
- **People search.** The intranet's easy-to-use people search application houses all employees' contact information, including phone number, name, location, and so on.
- **Team communication and productivity.** Each company department has a specific website to store and distribute information between peers and among teams.
- **Improvement of processes and knowledge sharing.** The intranet features a community environment created for people to share information and acquire knowledge about specific themes in the company's process. Today, HSBC Brazil has a pilot program of two communities: leaders' career and process quality.

DESIGN PROCESS AND USABILITY ACTIVITIES

The redesign process included a variety of user engagement activities. The team segmented the project into three phases: diagnostic phase, phase I implementation, and phase II implementation. User research, testing, and engagement were conducted throughout all three as follows.

Diagnostic Phase

The diagnostic phase gave the team an opportunity to get perspective on the project and on user's reactions to the existing site. They solicited feedback from site users, business leaders, experts, and user experience specialists. They also looked at other company intranets for the purpose of benchmarking their own site and examining best practices.

The team began the diagnostic phase by conducting a series of focus groups and user interviews that included more than 3,500 employees from all regions of the country. Activities included:

- Usability tests (16 people)
- Quantitative research (1,500 people)
- Focus groups (250 people)
- Interviews (200 top executives)
- Card sorting (more than 200 people)
- Interview sessions (with approximately 1,200 users who were shown the project and offered feedback)

Through these activities, team members could assess the information needs of the users and identify business opportunities for the site.

The design team involved end users by conducting usability test sessions and card sort exercises to refine the IA.

10 Best Intranets: HSBC Bank Brazil



Pictured: The HSBC team conducting a card sort exercise with site users.

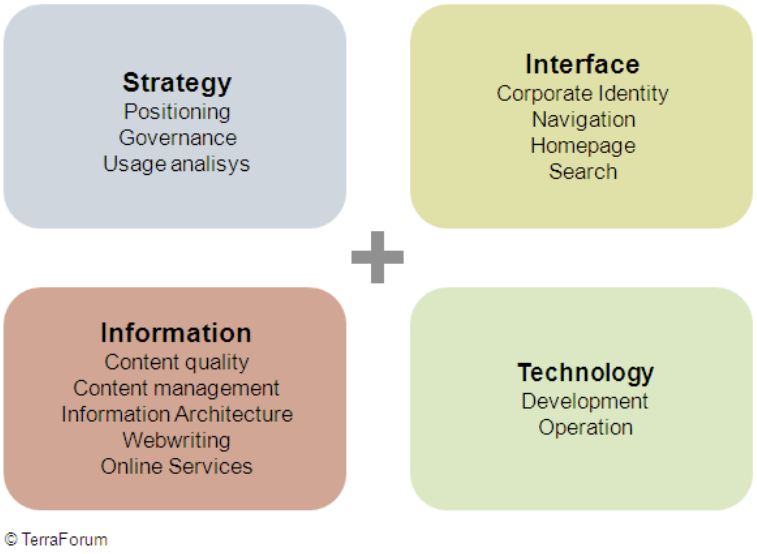
Separate from the user research, the team interviewed 200 top company executives to identify business opportunities where the intranet could add value to the company as a whole. The executive interviews yielded approximately 320 ideas, including the opportunities to:

- Improve collaboration among departments
- Improve communication within departments
- Provide sales and product information to branch employees, helping them increase sales and reduce rework in back office areas
- Put administrative services—such as maintenance requests and vacation scheduling—on the intranet to increase productivity
- Inform employees about what's happening in the company, including changes, results, challenges, and information on market influences

These insights were prioritized and converted into a medium-term project plan. According to Claudio Terra, TerraForum CEO, "HSBC chose a very robust project approach and has a clear vision about the intranet evolution and its potentialities to leverage the organization businesses in the country."

To get some outside perspective, the design team engaged specialists from TerraForum to conduct heuristic evaluations and perform a gap analysis on the existing site.

This process involved a maturity analysis that evaluated four aspects of the site: strategy, information, interface, and technology. The following chart illustrates this maturity analysis breakdown.



Pictured: The maturity analysis conducted by HSBC's agency partner, TerraForum, analyzed the intranet on four aspects: strategy, interface, information, and technology.

In addition to this outside analysis, the design team also conducted a benchmark study, analyzing the HSBC intranet against 20 other Brazilian intranets, including five from the financial industry. The study also benchmarked all HSBC Group intranets and analyzed best practices from intranet research, including intranet reports from Nielsen Norman Group.

Phase I: Planning & Design

What the HSBC team refers to as "Phase I Planning & Design" was a design and architecture phase that included involving users in various rounds of iterative prototyping. A high-level navigation structure was designed and validated through card sorting sessions (involving more than 300 people), while paper prototyping was used to refine the deeper levels of navigation (third and fourth tier) and validate page templates.

The team's design approach was iterative and included multiple test sessions involving users. This approach helped the team refine the design incrementally in response to the test results.

During this phase, the team began the difficult task of rewriting content. The redesign project involved rewriting most of the intranet's content, which included approximately 600 pages (and more than 1,500 "standardized written sheets" a term used in Brazil to describe a document with 1,400 characters) of institutional, HR, and administrative content. The content initiative was a joint collaboration between the content owners (who often resided across the many bank departments) and the intranet team. On the business side, more than 150 people contributed new content utilizing a wiki to write, edit, and refine it. The team then published the content to the intranet via the CMS.

The team chose the wiki approach for two reasons. First, by using a wiki at this phase, they were introducing collaboration tools into the bank environment and getting users accustomed to using them. And, according to Project Manager Paulo Floriano, a wiki was simply the best tool for the job. They needed to create content with the participation of dozens of people—content managers, legal and institutional staff, the help desk department, HR, compliance, and so on—and the wiki facilitated that collaboration.

"Consolidating a wide range of opinions and mental models was not easy," says Suzana Ribeiro, one of the TerraForum editors responsible for the content rewriting. "But we did a good job engaging people in the process."

What also helped was a writing manual, which the team developed to codify the specific guidelines for writing for the HSBC intranet.

The final piece of the phase I architecture was applying SEO to the new content. To aid in this task, the team mined search logs.

Phase II: Implementation

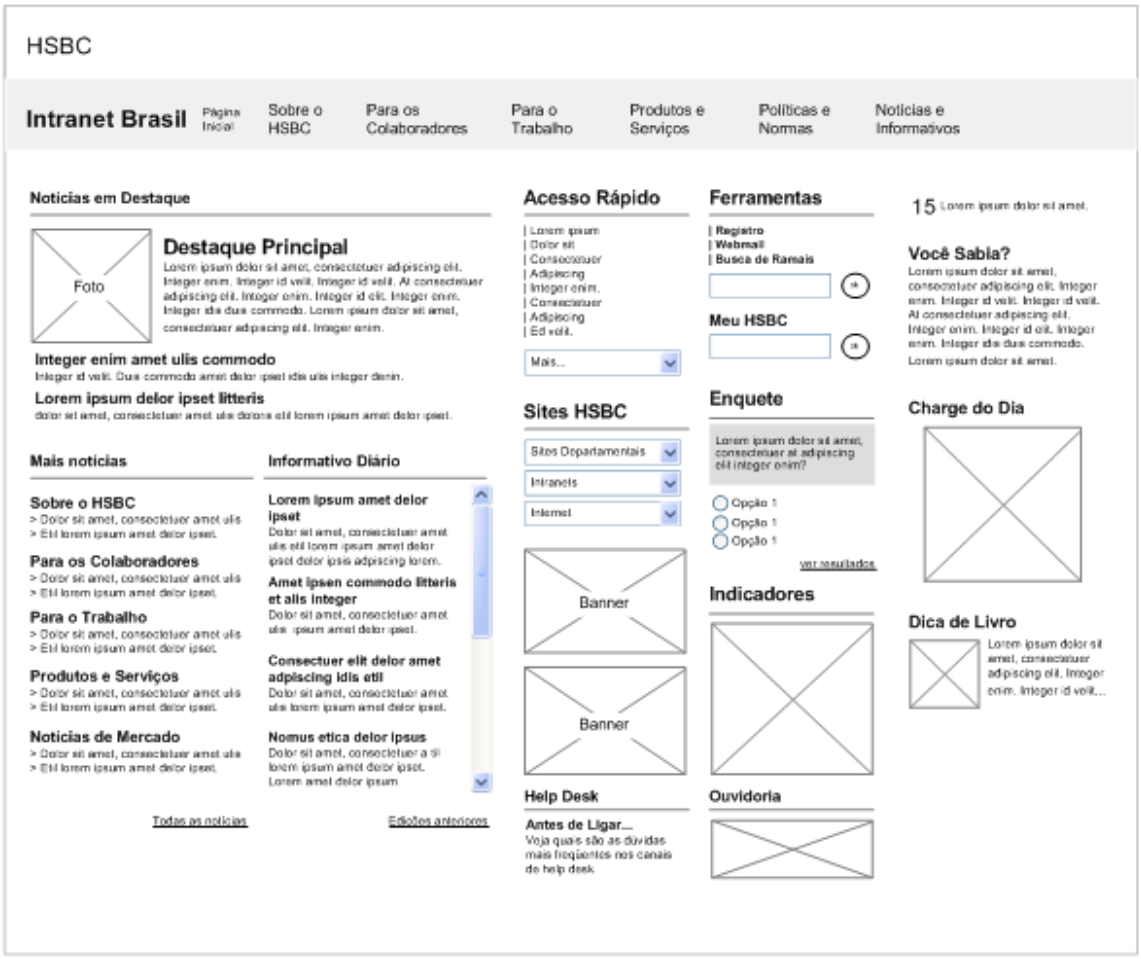
Phase II let the team test the work completed in phase I. While phase I was a chance to define the IA, taxonomy, layout, and content, phase II was where the team tested and refined these items—because, as Floriano notes, this was where they could see, in practice, how every item was working in terms of IA, taxonomy, and layout. The phase II work also included a platform change (migration to IBM WWCM) and implementing collaboration items (departmental sites and communities of practice).

10 Best Intranets: HSBC Bank Brazil



Pictured: A user works with a paper prototype.

10 Best Intranets: HSBC Bank Brazil



Pictured: One of the wireframes developed by the HSBC design team.

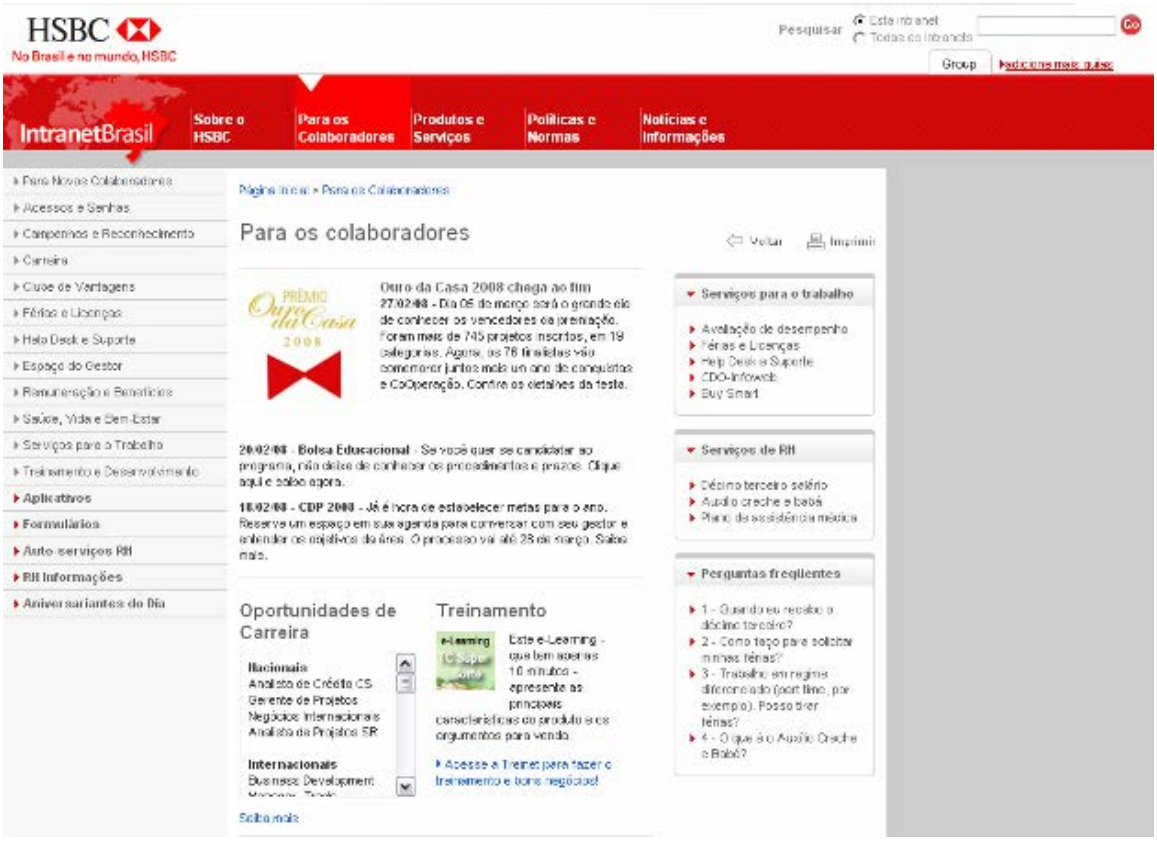
Findings

As often happens during user testing, the HSBC team found discrepancies between how the team viewed some information and how the users themselves viewed it. A good example occurred during a card sort with employees from Losango, a company HSBC Brazil had recently acquired. The team had assumed that Losango users would want their content segregated from the core HSBC information; the card sort proved otherwise. “We thought users wanted a separated area for their content,” says Denise Shibata, IA intranet coordinator. “Surprisingly, the card sorting proved to us that users don’t see themselves as a separate audience. They wanted to see Losango integrated in the intranet’s architecture.”

Another result that the team found interesting was that, in test sessions following the phase I implementation, the team observed that users sometimes found the intranet’s main sections—which had a high volume of content—intimidating to navigate. “We found that, because of the high volume of content that each section has, users sometimes didn’t know how to start to navigate,” says Shibata. “They were a little cautious to start to navigate and didn’t find what they were looking for.”

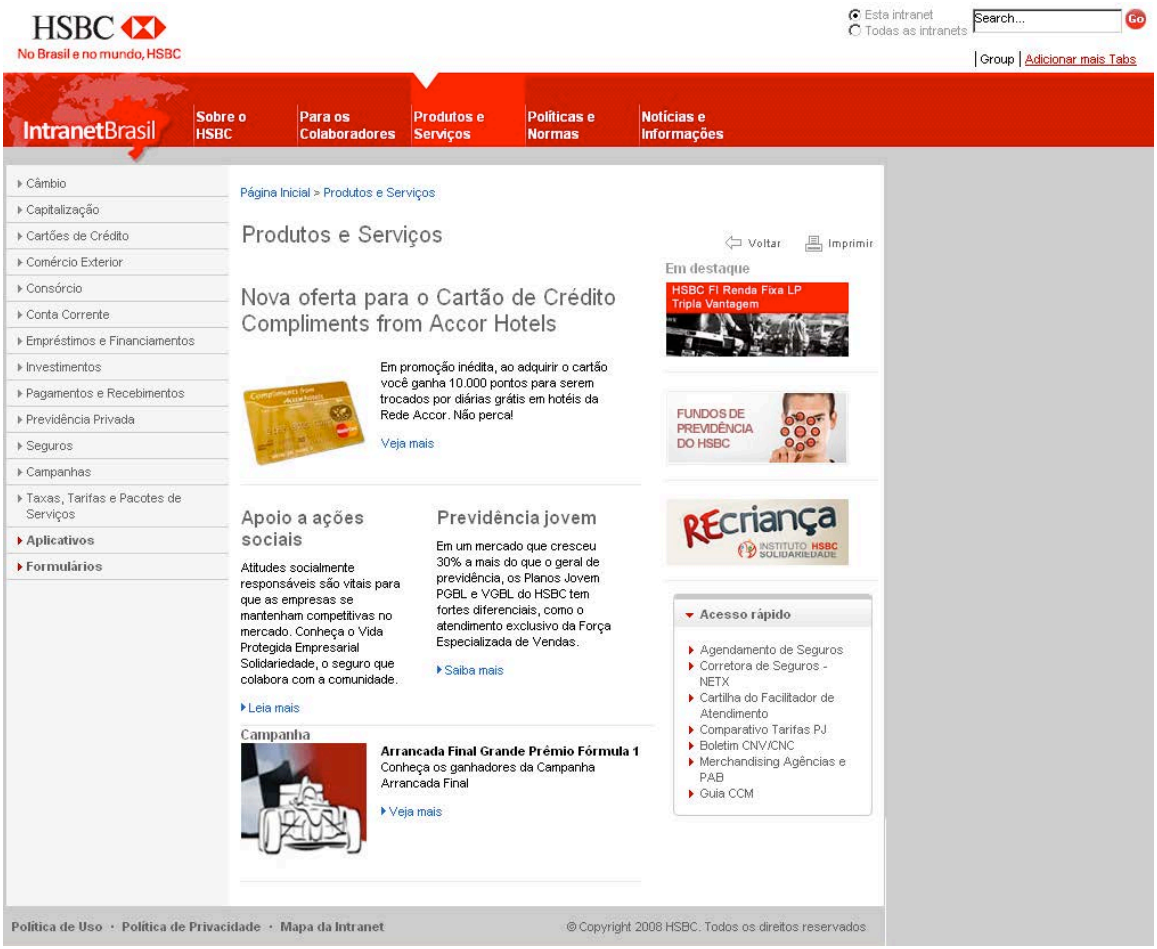
Because of this finding, the team implemented support elements such as navigation by themes, alphabetical indexes, lists of content with frequently asked questions and most accessed pages.

The ultimate solution, they realized, was to create "subhomes." These subhomes serve as landing pages for each of the main sections (*About HSBC*, *To Employees*, *To Work*, and son on) and also serve as a starting point for users.



Pictured: Every section in the top-level navigation menu has a subhome. The team created these pages to facilitate user navigation within each section and to help users deal with the site's considerable volume of content.

10 Best Intranets: HSBC Bank Brazil



Pictured: The *Products and Services* (*Produtos e Servicos*) subhome.



Pictured: A collage of photos taken from the face recording during the usability tests.

URL AND ACCESS

The HSBC intranet portal is available at http://portal.hsbc.com.br and is every user's start page.

TECHNOLOGY

The intranet uses IBM Websphere and its components, including:

- WWCM for content management
- Quickr for collaboration places
- Portal search for searching collaboration places
- Groups and users management

Other software used in the HSBC Brazil portal includes:

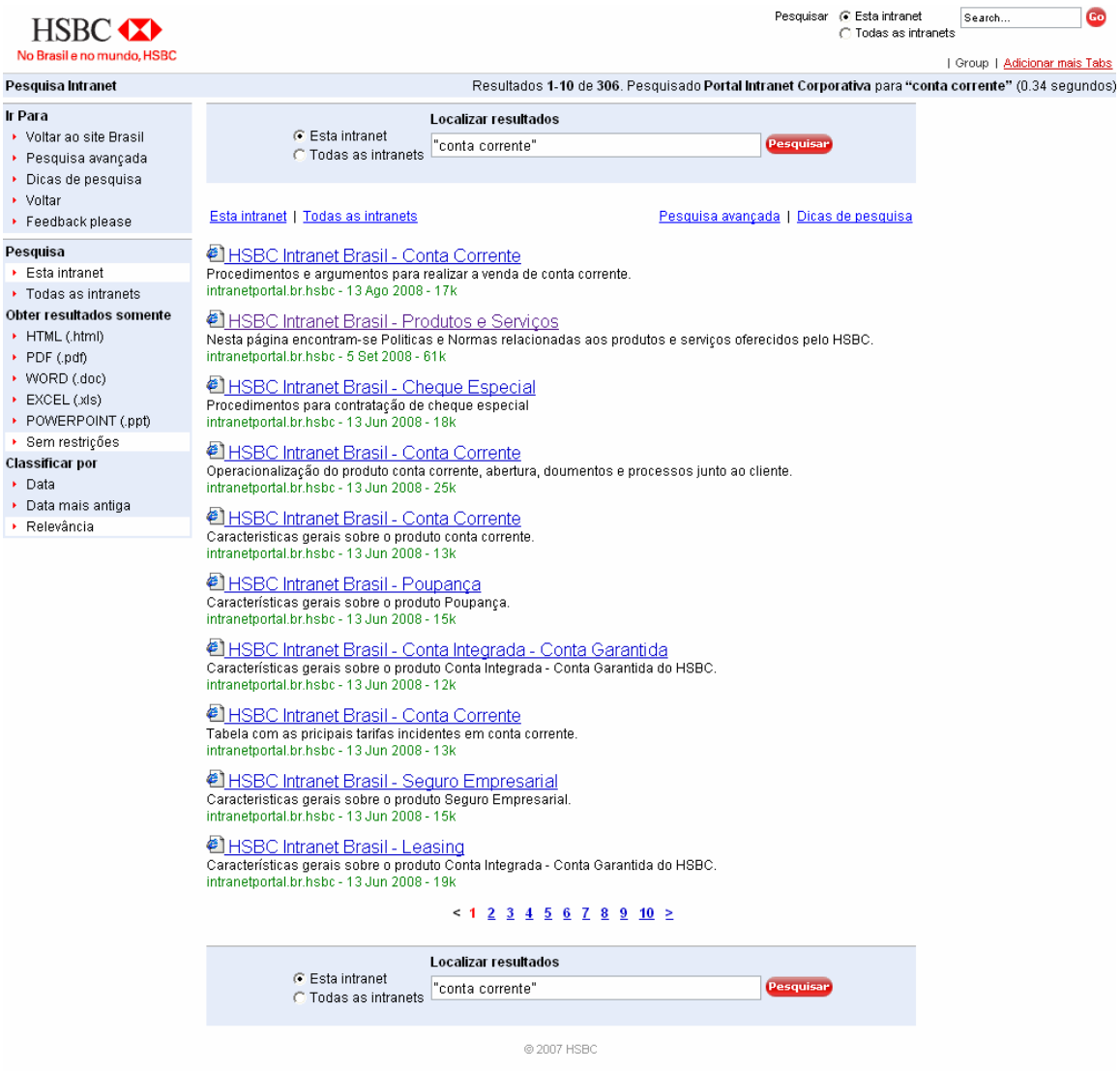
- Proprietary software to manage policies and procedures (it will be integrated in the future to the WWCM)
- Proprietary software for quizzes, polls, and research
- Cisco software for Web-based internal TV
- Proprietary software for the CEO's blog
- Proprietary software to manage external news clipping
- More than 1,500 automated business forms
- More than 150 automated business applications and workflows

- Proprietary (global) software to manage tests and quality assurance
- WebTrends for statistics

SEARCH

Verity K2 is the global HSBC tool for search. "We work with Verity K2, a very powerful search engine," says Floriano. "One of the parts of our work was the search engine optimization. We made several changes and established policies for all the pages and documents of the intranet. We refined the title, description, and keywords of every single HTML page and primary Office documents."

The team is still in the process of gathering hard data about this search work. They are still developing search improvements as they go along. Some of the near future enhancements will include integration of thesauri (Verity K2 has native thesauri, but they need to be translated) and refinement of advanced search.



Pictured: Search results for bank account ("conta corrente"), an HSBC banking product.



Pictured: Results from a people search on the HSBC intranet.

CONTENT MANAGEMENT

In moving to a portal platform, HSBC has also moved from relying on static, document-based content toward more dynamic collaboration-based content. The new site relies less on stored documents (Microsoft Office documents, pdf files, and the like), and more on document repositories within the collaboration spaces (departmental sites and virtual communities). Within these collaboration spaces, the document repositories have native version and history control (using IBM Quickr). All subhomes have a list of the "last updated pages" within each section.

The team used WWCM as the content management tool.

As far as the content itself, some parts of the intranet are decentralized, including forms, applications, policies and procedures, the CEO's blog, and all of the collaboration places. Part of the current project is to completely decentralize all intranet content, but the team admits that this is still a work in progress.

Because decentralizing everything is a huge task involving the entire organization—at least 500 people, between content writers and approvers—they are being very cautious. "To do something more structured and effective, [we are] first decentralizing some areas that have the expertise and can exert the effort required to dedicate to this task," says Fernanda Santos, intranet content coordinator. "By using this approach, we are reducing the risks of deviation of content and writing."

The intranet team is responsible for maintaining the policies and guidelines for content, layout, and IA. They have established a template library for content users

that consists of 21 templates for the intranet and no more than 10 templates in the collaboration environment.

MOBILE

Making the decision to build the site with strict adherence to the W3C standards facilitated mobile intranet access. This gives the site basic customization for portable devices. As a result, the top 300 executives can access the intranet via their smartphones. The intranet team has no specific plans to customize the site further for specific devices, until the beginning of phase III, which begins in January 2009. The phase will also focus on other accessibility issues.

FEATURES

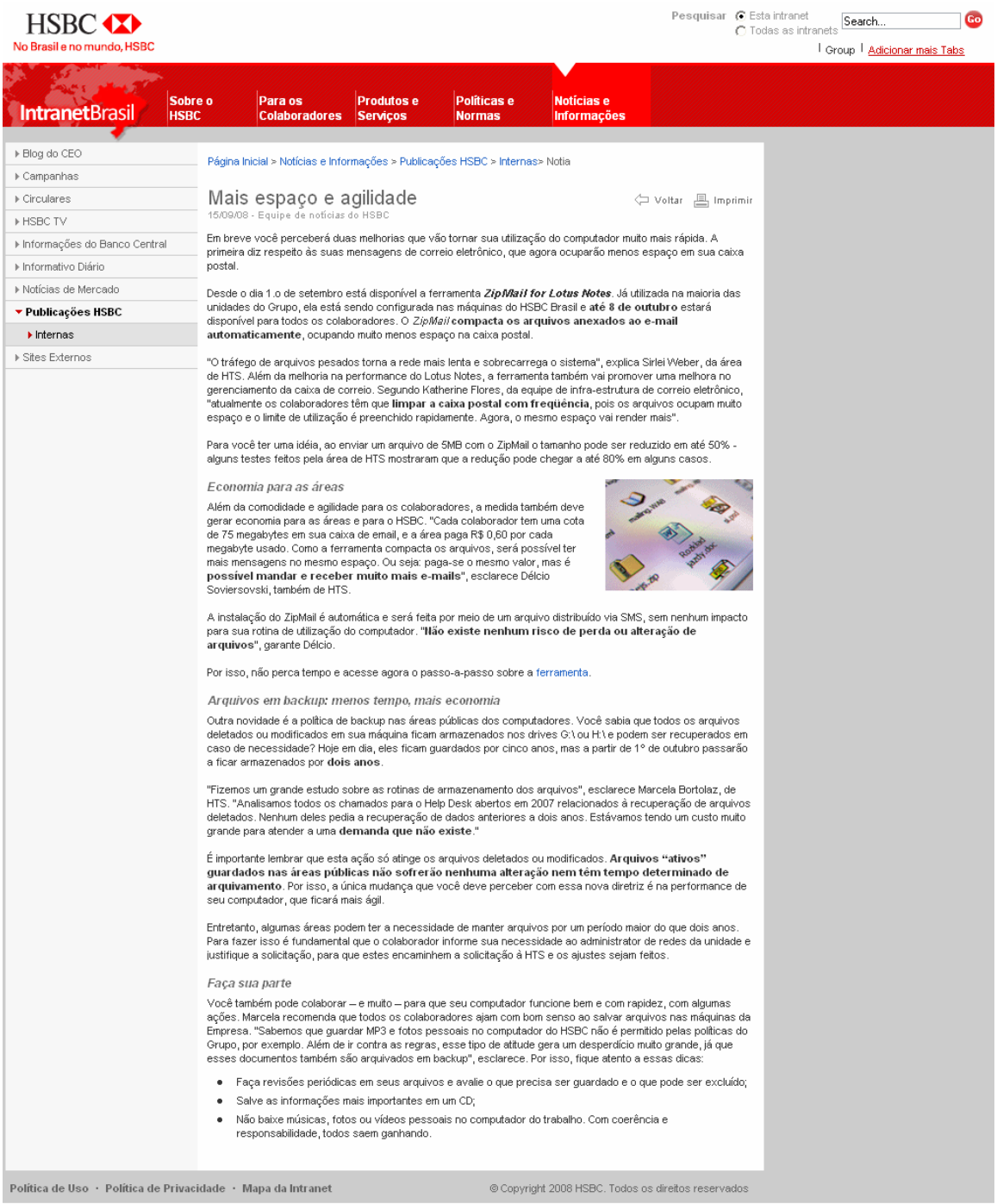
The following are the main features of the HSBC Brazil intranet:

- **The CEO's blog.** In 2005, Emilson Alonso, the bank's president at that time, created a blog to communicate more effectively with his employees and obtain feedback on important company strategy issues. Since that time, more than 200 articles and 8,000 comments have been posted and the blog has been viewed more than 2,000,000 times. Participation is opened to all employees.
- **News**. The site's news is split into topics and themes that follow the same principles as the main intranet section's categorization: *About HSBC* (institutional news), *To Employees* (HR News), *To Work* (administrative news), and *Products and Services* (financial products news).
- **Circulars, forms and reports**
- **HR employee self-service**
- **Administrative self-services.** These logistic- and facilities-related self-services include:
    - more than 1,500 **automated business forms**, and
    - more than 150 **automated business applications and workflows.**
- **Corporate calendar**
- **E-learning**
- **Online career opportunities**
- **Quiz, poll, and research applications**
- **External news clipping.** HSBC hired an external company to research the most important daily news of interest to employees (see the screenshot below). Users can filter by category—such as printed matters, Web, and so on—and search.
- **Web-based internal TV**
- **Currency quotation and exchange rates**
- **Departmental sites.** These specific sites include tools such as blogs, news, calendars, announcements, and private document libraries.
- **Communities of practice.** These specific environments provide tools to enable discussion among peers and departments. Tools include discussion forums, calendars, announcements, and document libraries.
- **Search.** The HSBC Brazil intranet uses Verity K2, the search engine defined by global IT. Verity K2 has advanced searching options, filtering, sorting, and

results categorization. Users can also search from the Brazilian intranet to any other countries' intranet within the HSBC family.

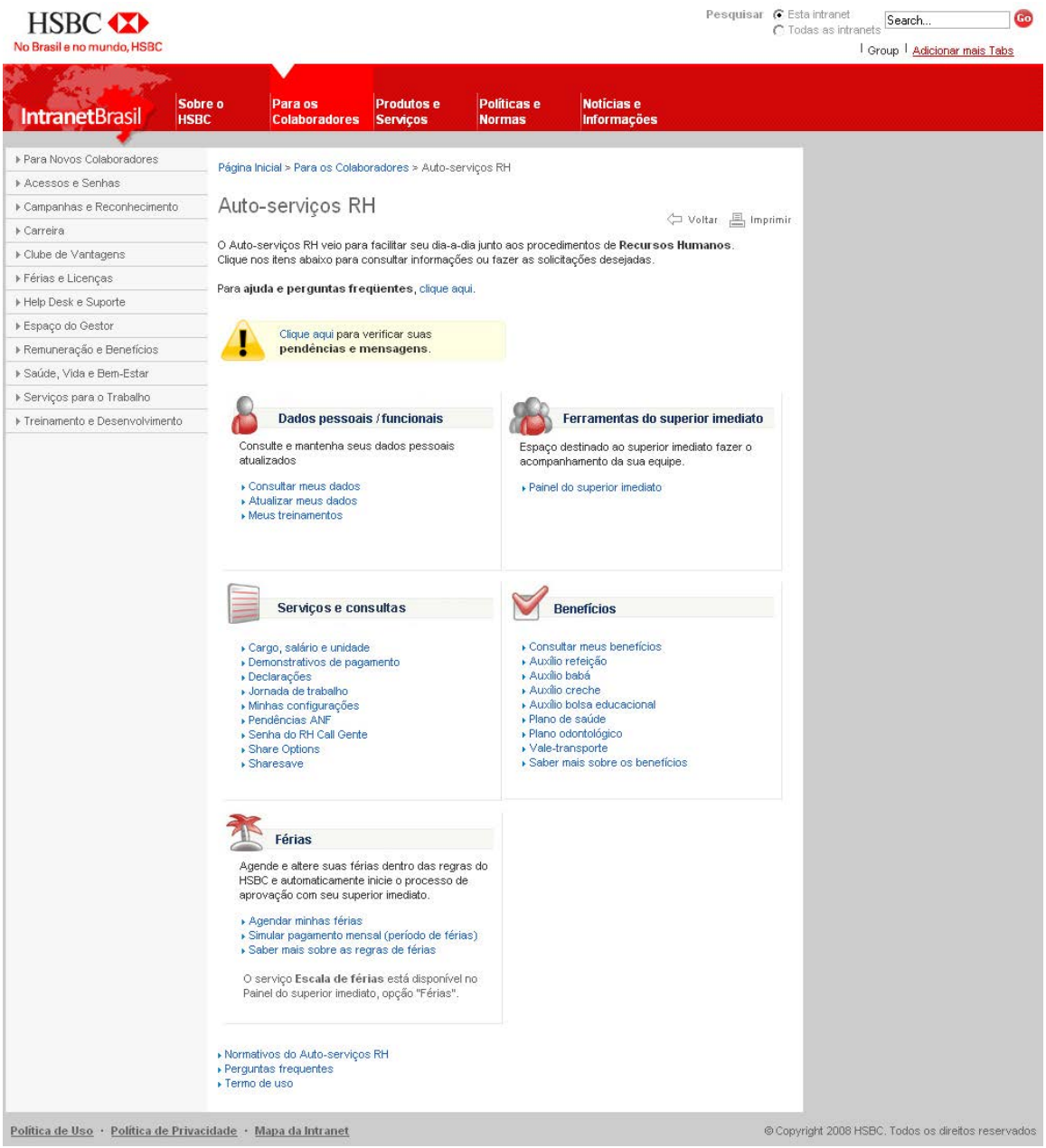
- **Product's quick guide.** This template was created with the objective of bringing together all the information needed for selling and operationalizing HSBC products and services. It also serves as an access point for related information, such as product procedures, available training materials for the product, and so on. To meet its objective, the template makes liberal use of cross-navigation tools.
- **Service's quick guide.** This template was created to bring together all the information needed for employees to utilize HR and administrative services. It also serves as an access point for related information, such as policies and procedures, contact information, and frequently asked questions.
- **People search**: From the homepage, users can search for people by name or phone number. As the screen below shows, the search results include the person's name, ID, phone number and Voice Channel (VoIP), department, and location. The feature is used by 60% of site users at least once a week.

10 Best Intranets: HSBC Bank Brazil



Pictured: A news page.

10 Best Intranets: HSBC Bank Brazil



Pictured: The intranet's main *HR Self-Services* (*Auto-serviços*) page.

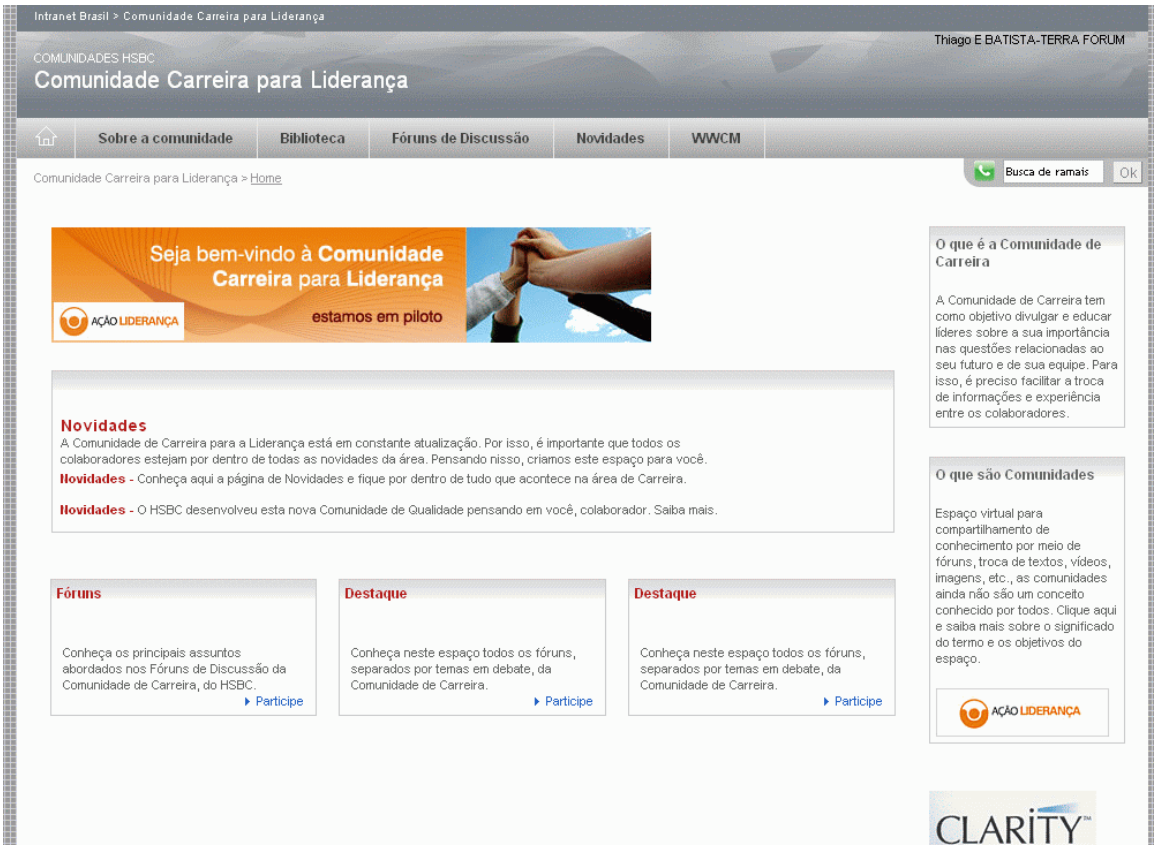
Collaboration Tools

Communities

The communities of practice were created to increase collaboration around topics of strategic interest to the organization. The process of choosing the communities for the project's pilot-phase consisted of a detailed process of prioritizing the functionalities and the architecture by including users in test sessions to refine the communities.

Each community includes the following areas:

- **About the community.** This area contains administrative content, including rules, moderators, results achieved, and a description of the community.
- **Document library**. The library serves as a repository of reference materials, including articles, a glossary, and frequent asked questions.
- **Discussion forums.** This area includes both open and restricted forums to discuss defined topics.
- **News.** Here, users can find informative content aimed at what is and will be happening in the community.

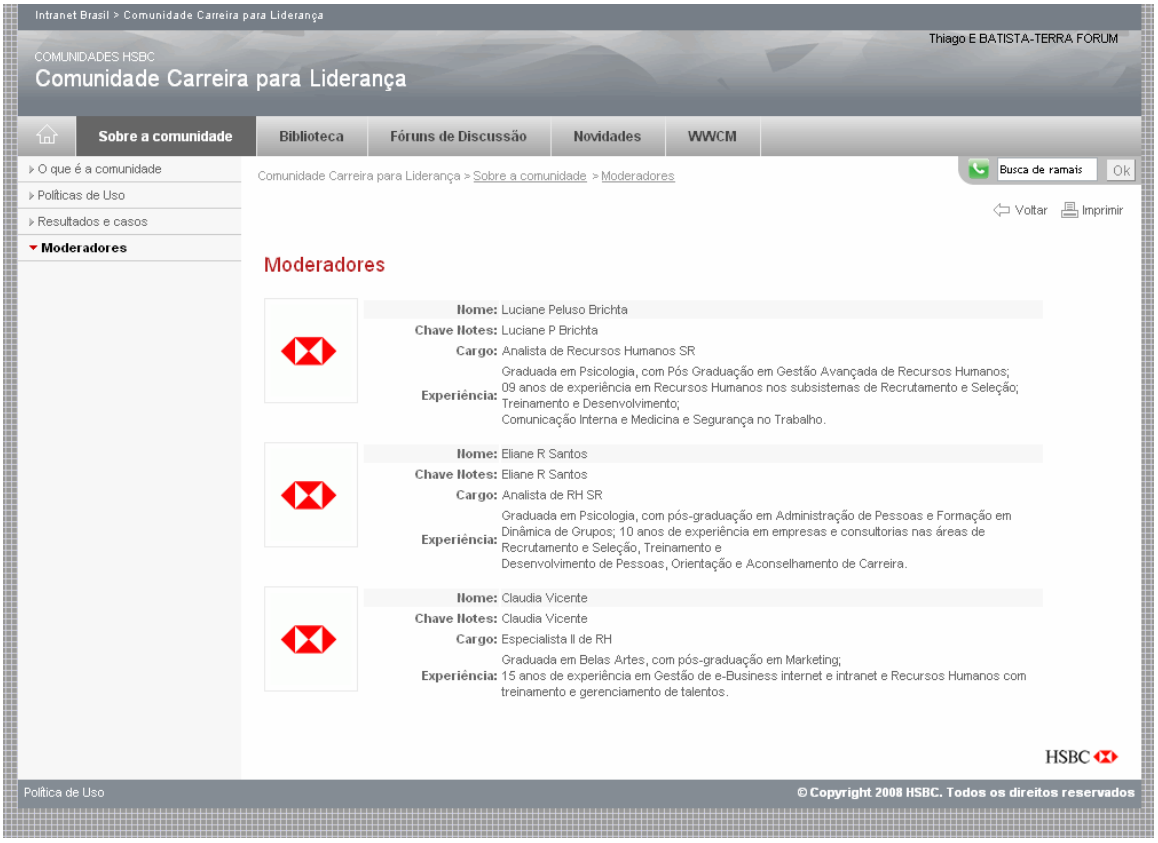


Pictured: A community homepage on the HSBC Brazil intranet.

10 Best Intranets: HSBC Bank Brazil

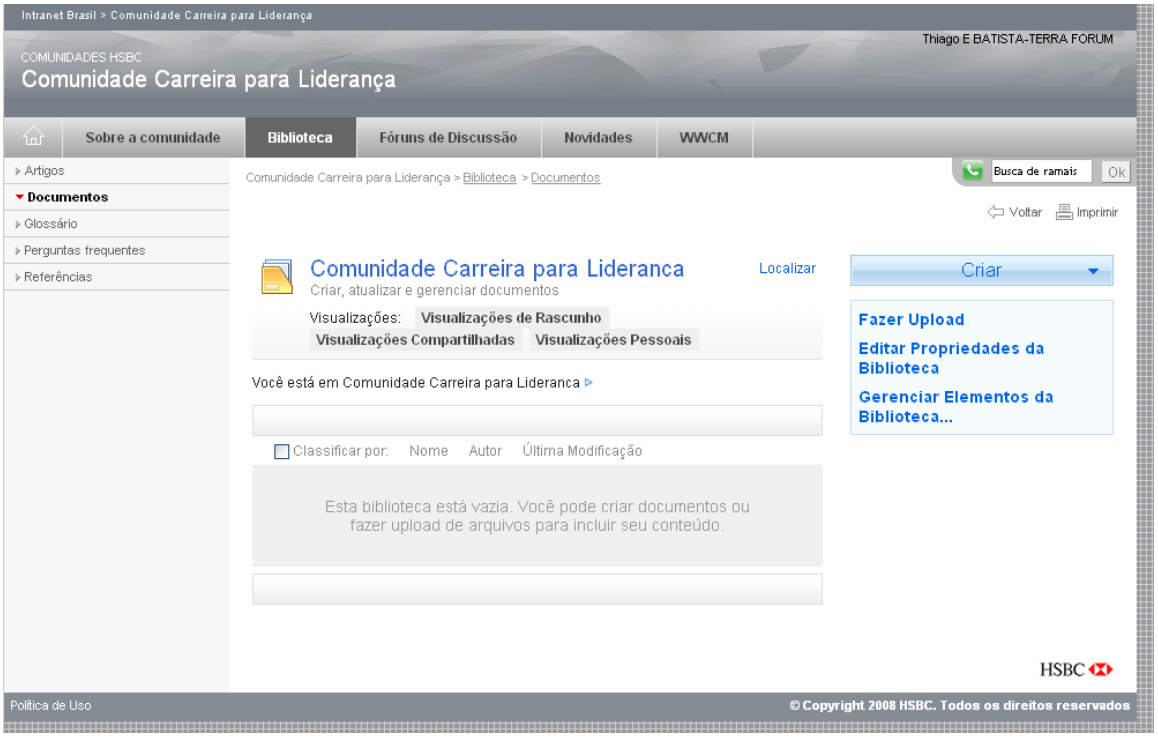


Pictured: The *About the community* (*Descrição da Comunidade*) page.

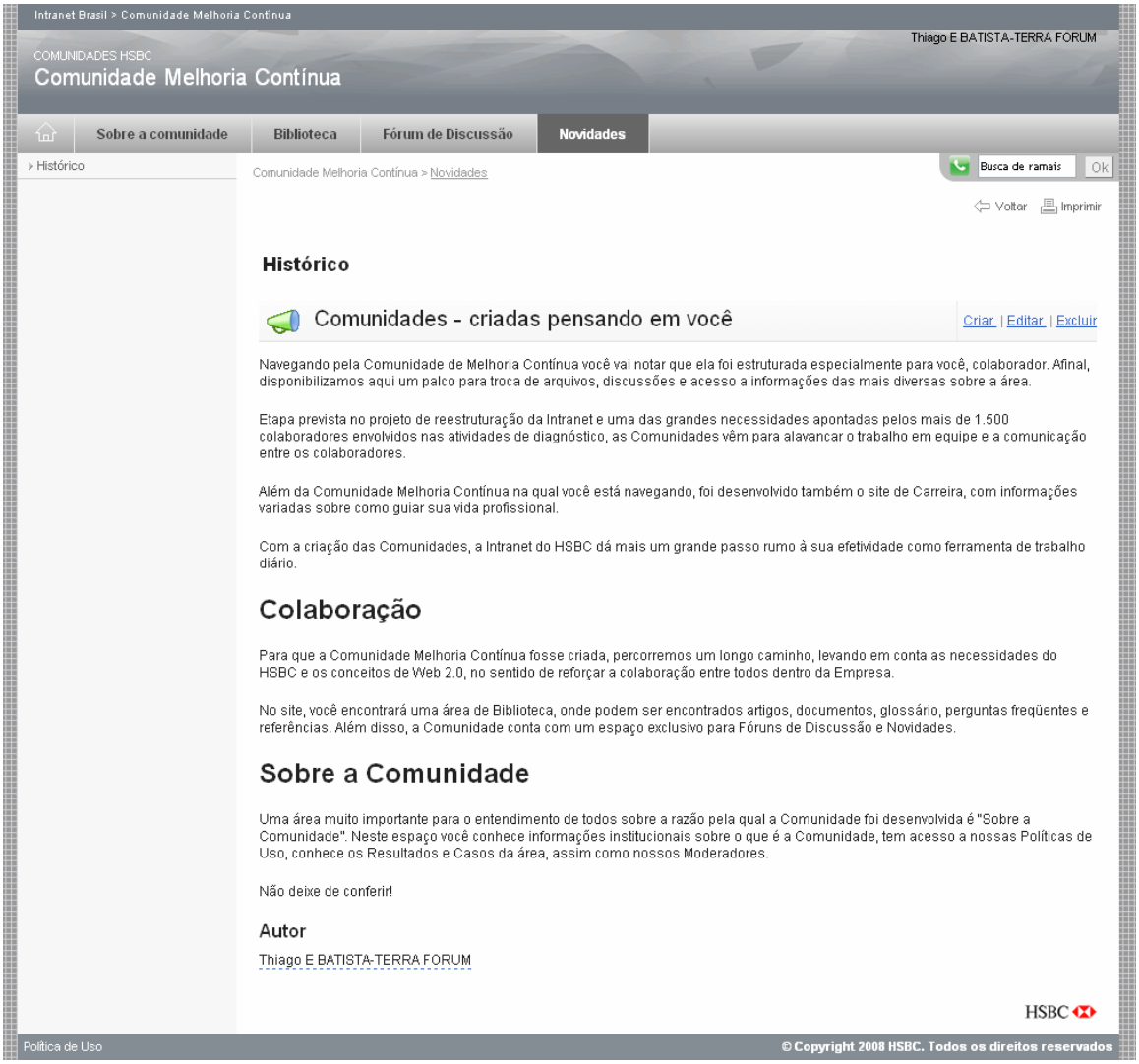


Pictured: The list of moderators for a community site.

10 Best Intranets: HSBC Bank Brazil



Pictured: The site's document library.



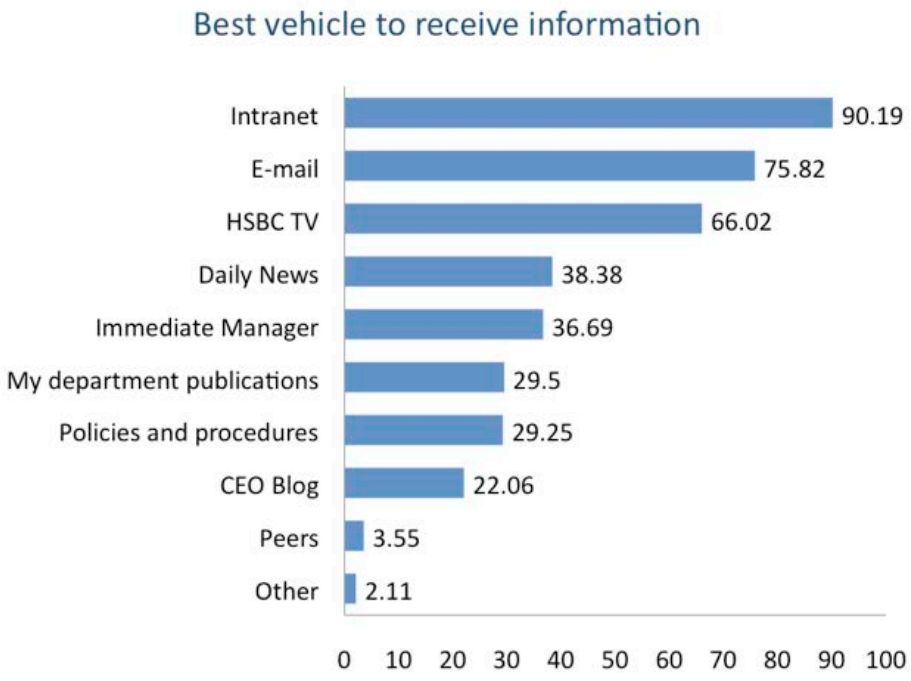
Pictured: The news section for an HSBC community.

RESULTS / ROI

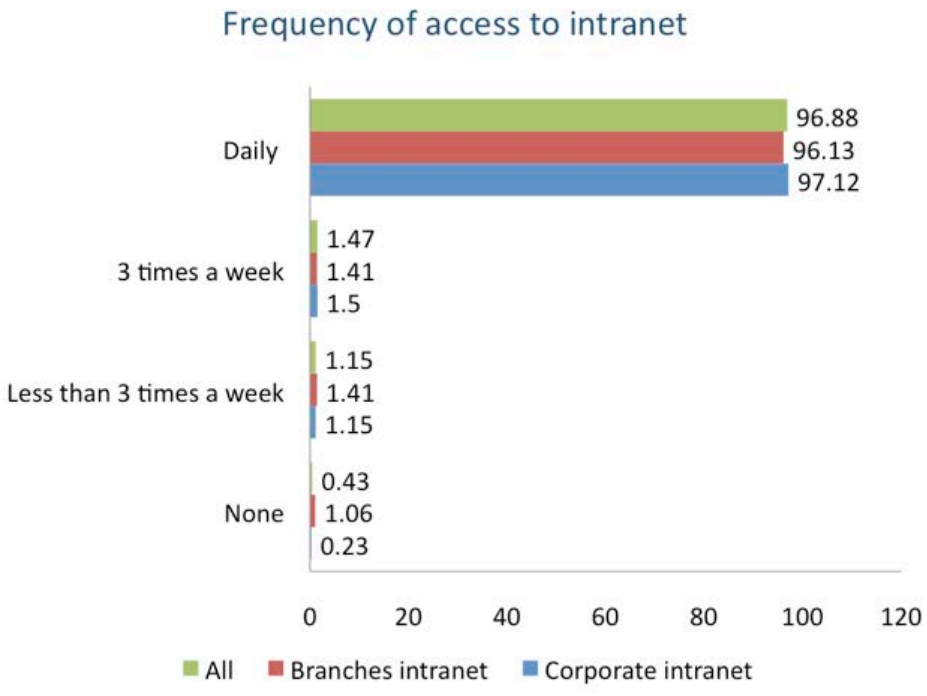
The intranet team can point to a number of important wins from the redesign project, but only a few are hard numbers. Many are important business improvements that reverberate across the organization and have an impact on the daily lives of the employees. Miranda cites the following as examples of these types of results:

- Intranet Brazil is the most accessed of the HSBC Group's intranets.
- The intranet's redesign project was awarded an internal prize, "Ouro da Casa," out of 20 competing projects. This prize is considered the most important project-recognition prize across HSBC Brazil.

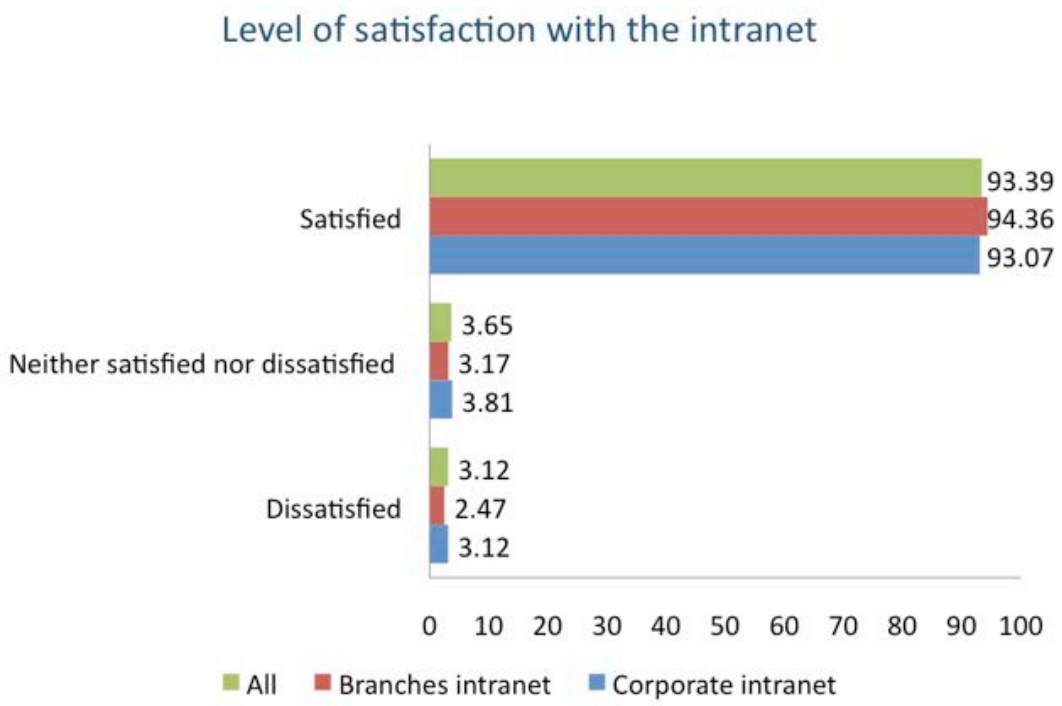
10 Best Intranets: HSBC Bank Brazil



Pictured: Results from a 2008 research study with more than 3,000 people across the organization. Of those surveyed, 90% considered the intranet the best vehicle for getting information about the company.



Pictured: More than 96% of employees surveyed access the intranet daily.



Pictured: The research study showed a 94% increase in user satisfaction for the intranet.

The intranet redesign has enabled users to:

- Easily access relevant information about HSBC's products (increasing the productivity of sales teams)
- Easily access automated HR services (increasing overall productivity of employees)
- Easily access automated administrative services
- Communicate more easily and effectively; all communication vehicles are consolidated on the intranet, including policies, standards, and governance
- Use the virtual communities to share ideas and communicate in a more effective way to solve problems and suggest improvements
- Share information via the departmental sites, which consolidate all the area communication on a single channel and thus improve productivity on users' day-by-day tasks
- Quickly access "what's going on" in the company (through news, corporate calendar, announcements, blogs, and so on)
- Readily access company history, vision, mission, objectives, and financial results

Although user comments are an anecdotal way to gauge success, taking the temperature of the organization can be a great way to see if the intranet is gaining a positive reputation among the users. "When we had implemented the first phase of the project, the CEO posted a topic on his blog communicating that launch," says Marques. "This post had more than 60 comments." Among those comments were the following:

"Congratulations to the implementation team! We believe that the intranet will be a big milestone on the corporate communication. I love the new layout and the new content."

"The new intranet is much attractive and much easier to navigate. Congratulations."

"Definitely the intranet will be an excellent tool to our day-by-day. It will be saving us a lot of time."

"We are better motivated when we know that our systems and tools are being constantly improved."

"Congratulations! The new intranet look and feel is great. I already thought the last one was very good and you accomplished something very difficult by improving something that is already very good."

Kaupthing Bank

Using the intranet

Kaupthing Bank is a Northern European bank offering integrated financial services to companies, institutional investors, and individuals. It is currently among the seven largest banks in the Nordic region in terms of market capitalization. The bank operates in 14 countries and employs more than 3,200 people worldwide (as of June 2008).

Headquarters: Reykjavík, Iceland

Number of employees the intranet supports: 3,207

Locations: The bank operates in the following locations: Iceland, the US, the UK, Isle of Man, Finland, Sweden, Norway, Denmark, Germany, Luxembourg, Belgium, Switzerland, United Arab Emirates (Dubai), Qatar

Annual sales: Kaupthing Bank has EURm 53,089 in assets (as of June 30, 2008)

Design team

Intranet team and Kaupthing's graphic designer.

Members

Global intranet team: Gudný Danivalsdóttir, intranet project manager and Web editor; Sigurjón Ólafsson, global webmaster; Björn Erlingur Flóki Björnsson, Web editor.

In-house support: Thór Snaer Sigurdsson, graphic designer; Kristín Benný Grétarsdóttir, webmaster–Iceland; Daníel Reynisson, team manager–IT; Bjarni Ólason, server admin–IT.

Contractors: The company's Web partners, Eskill Ltd., provided the CMS tool (LiSA) and technical consulting, as well as programmers for the project. Kaupthing also worked with SJÁ (www.sja.is), a usability consultancy, on usability testing and consulting.

Eskill Ltd: Hrefna Arnardóttir, programmer/project manager; Ágúst Valgeirsson, director of consulting.

SJÁ Ltd: Áslaug Fridriksdóttir, executive manager; Hólmfrídur Vilhjálmsdóttir, usability testing and consulting.

SUMMARY

Kaupthing Bank's intranet does a lovely job of balancing information from employees' professional and personal lives. Helpful business information and the opportunity to learn more about colleagues makes the intranet appealing, and demonstrates that the organization values employees as individuals, not just as workers. The designers of this intranet are not just highly talented; they are also empathetic. The intranet encompasses one of Kaupthing Bank's business principles of "fun and flair."

The homepage is chock-full of interesting stories related to work and life outside it. Images make these stories lively. The page also offers personalization and links to tools that people need to help get their jobs done efficiently.

Once logged in, the user is recognized, and various pieces of local information are served up on the homepage. The user's name appears in the upper right, along with a link to *Edit profile.*

A fun video features actor John Cleese expressing the Kaupthing Bank core principles. This banner area at the top of the homepage is generally reserved for videos or other animations to introduce a particular message to employees. Occasionally, the intranet team inserts an analogue clock Flash banner that shows the time in six cities, reminding people that they work for an international organization.

Below the banner, the *News and Announcements* section displays the three latest news items or announcements from headquarters and the local offices. The date is clearly expressed internationally, writing the month in letters. The headline itself is a link to the story, and is both succinct and informative. For example, the headline *Kaupthing Moves Up Top World Banks Ladder* offers clear information, not just a

teaser to grab your attention. Further, the short description exhibits good writing and tells the story's main points: That the bank is now 124th among the world's top banks, having moved up 18 places from its ranking in *The Banker* magazine's previous list. If people didn't have time to click though and read more, they'd get the story's key point from a glance at the homepage: that the bank has improved on its already high ranking.

Press Releases appear just below the news section. If a user works in a location that offers local news, those items display here in the *Local News* section; if not, the space displays shortcuts to interactive features on the intranet.

Farther down the center content area, *The Other Side of Employees* section highlights an interview with a company employee. The summary includes the employee's name, where that person is based, and a close-up photo. This is a great way for employees to get to know one another and see the rich background of people who make up their organization. The featured employee changes weekly; while not every employee can be interviewed, people from many areas of the organization are profiled throughout the year.

Intranet designers also elevate the most-visited intranet areas, displaying the eight most *Popular pages on the intranet.*

The *Photos from around the world* section on the bottom of the homepage is very popular. The *Event Photos* area shows images from work-related events—anything from a meeting to a fun, team-building event. The event's name (such as "Spring Festival") is a link listed below one of the images, and leads to more images.

The *Photos from employees* shows a photo, the name of the employee who submitted it, and the picture's title and location.

In addition to having interesting images, one thing that makes these and other photo features a success is that they change regularly. The team updates these images two or three times per week. Some weeks, however, have fewer events. Because designers wanted to avoid keeping outdated photos up, they added a *Do you know your colleagues?* section to run in lieu of event photos when necessary. This section introduces a few randomly chosen Kaupthing employees at a time, with a total of five to 10 appearing in the section each week.

On the homepage's left side, the global navigation offers links to the user's local network, stock price, and a promotional area for various items, such as photo contest deadlines. Finally, the page lists the names of employees celebrating a birthday, along with the flag of the country they work in and a link to send them a personal message.

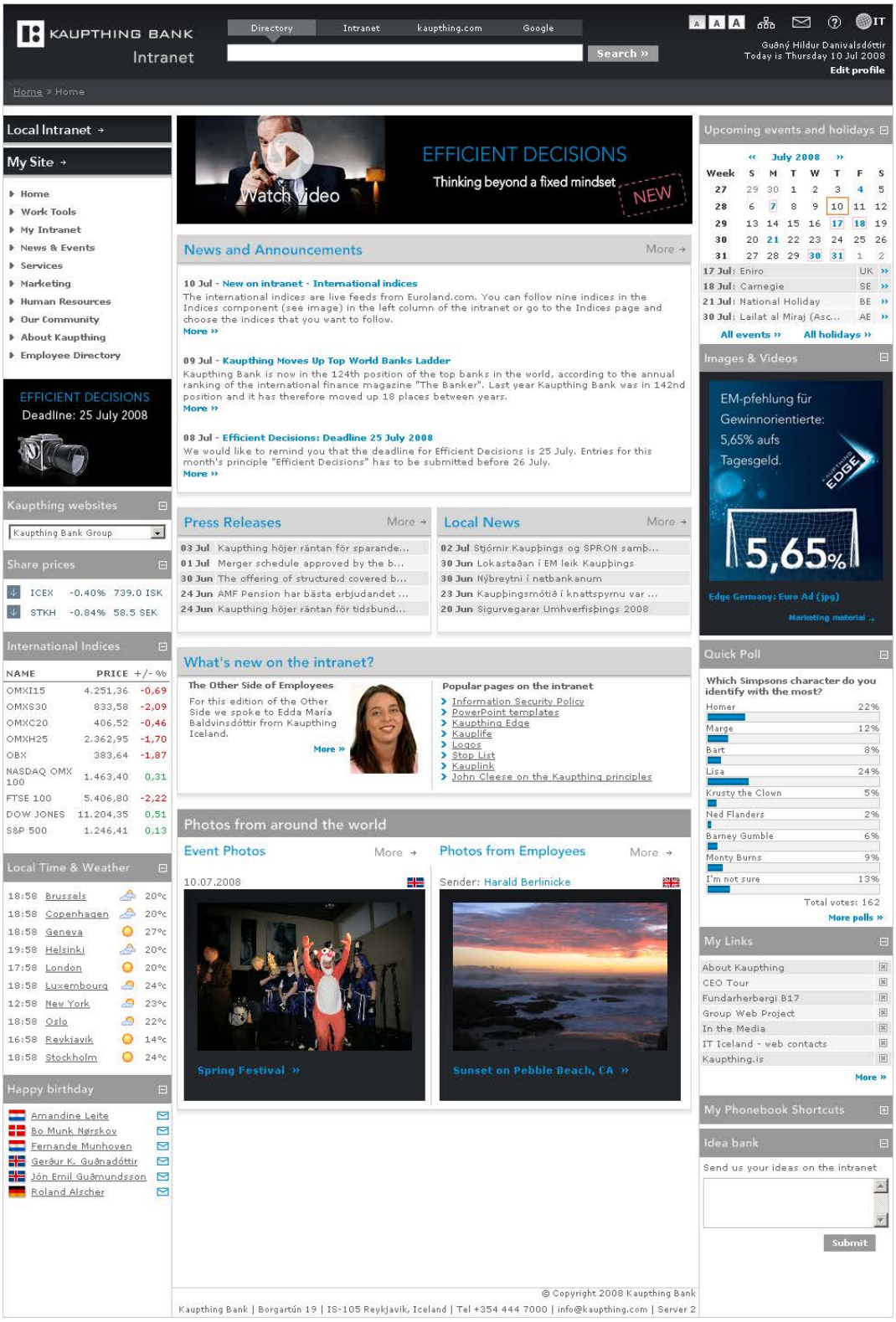
In the homepage's right column, the corporate calendar displays upcoming events and holidays. Below this is a link to the latest marketing material, images, and videos.

Every Monday, the intranet team updates the *Quick Poll.* This little survey gets people involved with various questions, whether controversial or benign. In one example, users were asked whether they use the "snooze" option on their alarm clock in the morning. (Most said yes, by the way.)

Users can add their own links to the *My Links* section. They can also create links to people that they want to call quickly via the *My Phonebook Shortcuts* section.

At the top of the page, users can access various search features. Icons in the upper right let them increase or decrease the text size—a nice accessibility feature. Users can also link to the site map, contact the webmaster, or get help on the intranet.

10 Best Intranets: Kaupthing Bank

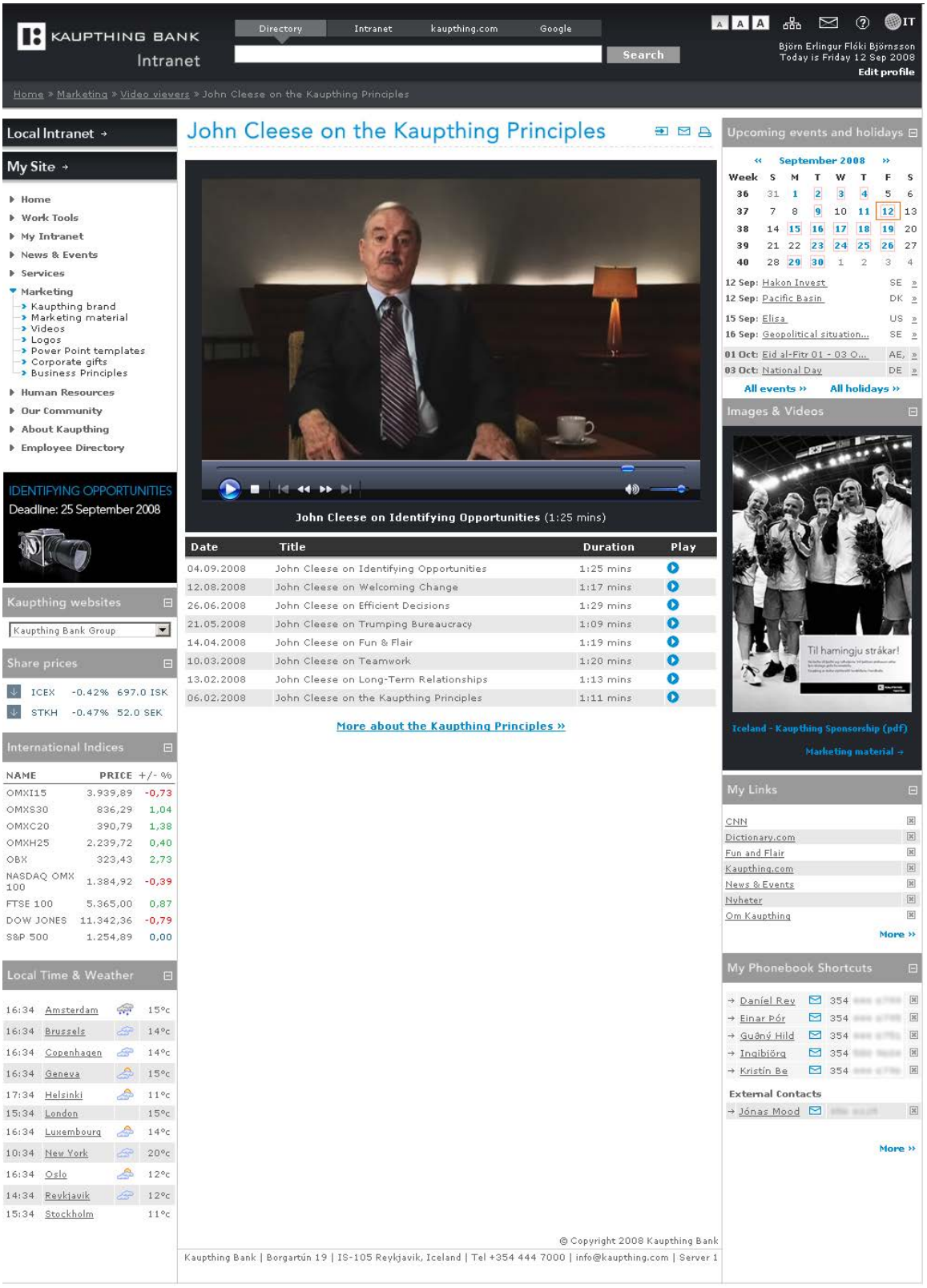


Pictured: The Kaupthing intranet homepage (shown here for an Icelandic user) offers news and links to business tools, plus articles and images that show the personal side of employees.

10 Best Intranets: Kaupthing Bank

The intranet's video viewer houses videos from the bank's marketing and other campaigns. Users can see the date, title, and duration of the videos before they choose to play them. Duration is a key component; users often look for short videos to watch. Also, video is a nice way to communicate with employees, and gives variety to the commonly used text and images.

10 Best Intranets: Kaupthing Bank

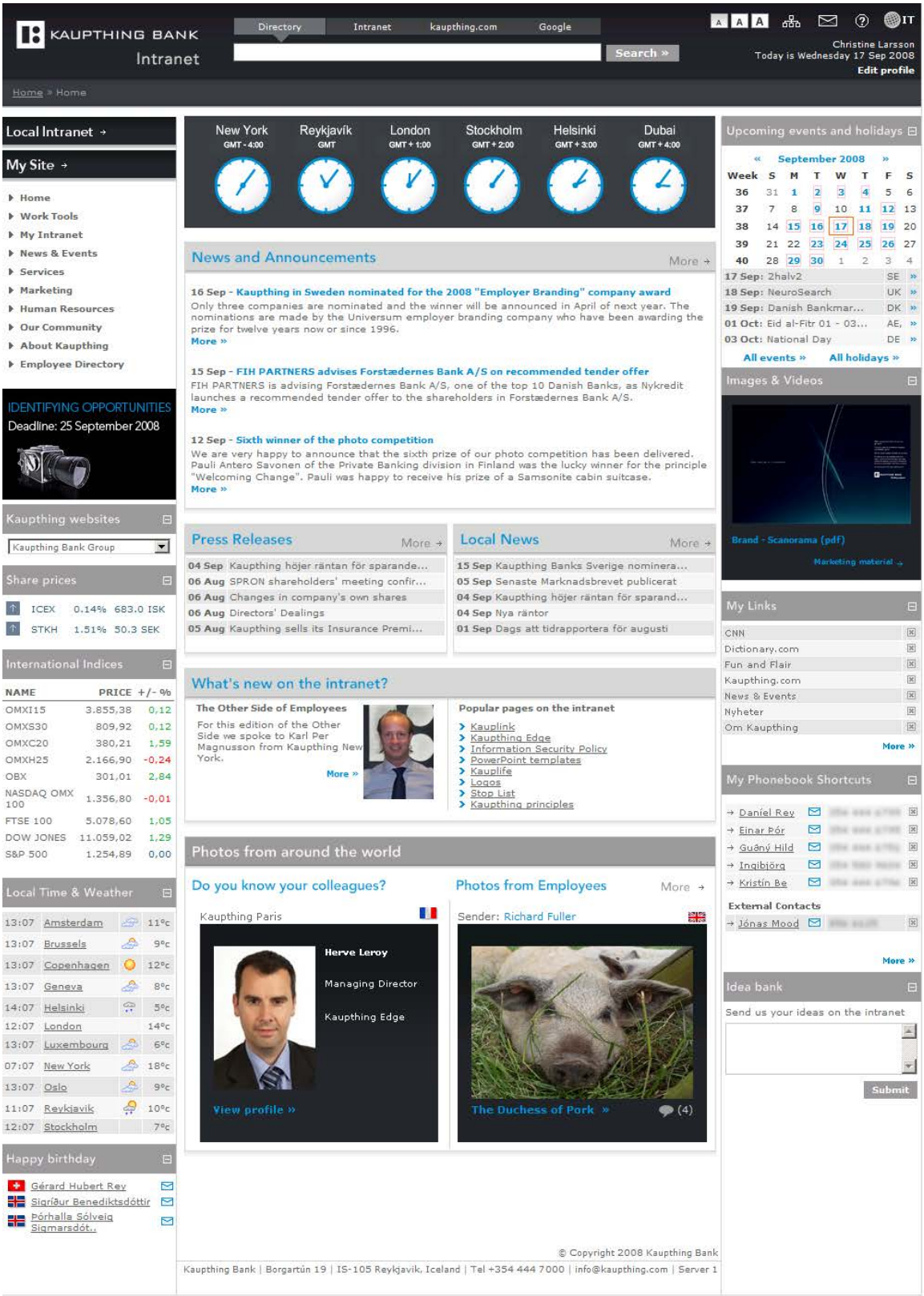


Pictured: On video pages, user can watch the video (pause, forward, and rewind) and also see other video titles and their corresponding durations.

10 Best Intranets: Kaupthing Bank

The homepage can look slightly different depending on the logged-in user's location. For example, the banner might change, and the local new areas might have different content. But overall, the intranets look about the same, creating a feeling of unity across the whole organization.

10 Best Intranets: Kaupthing Bank

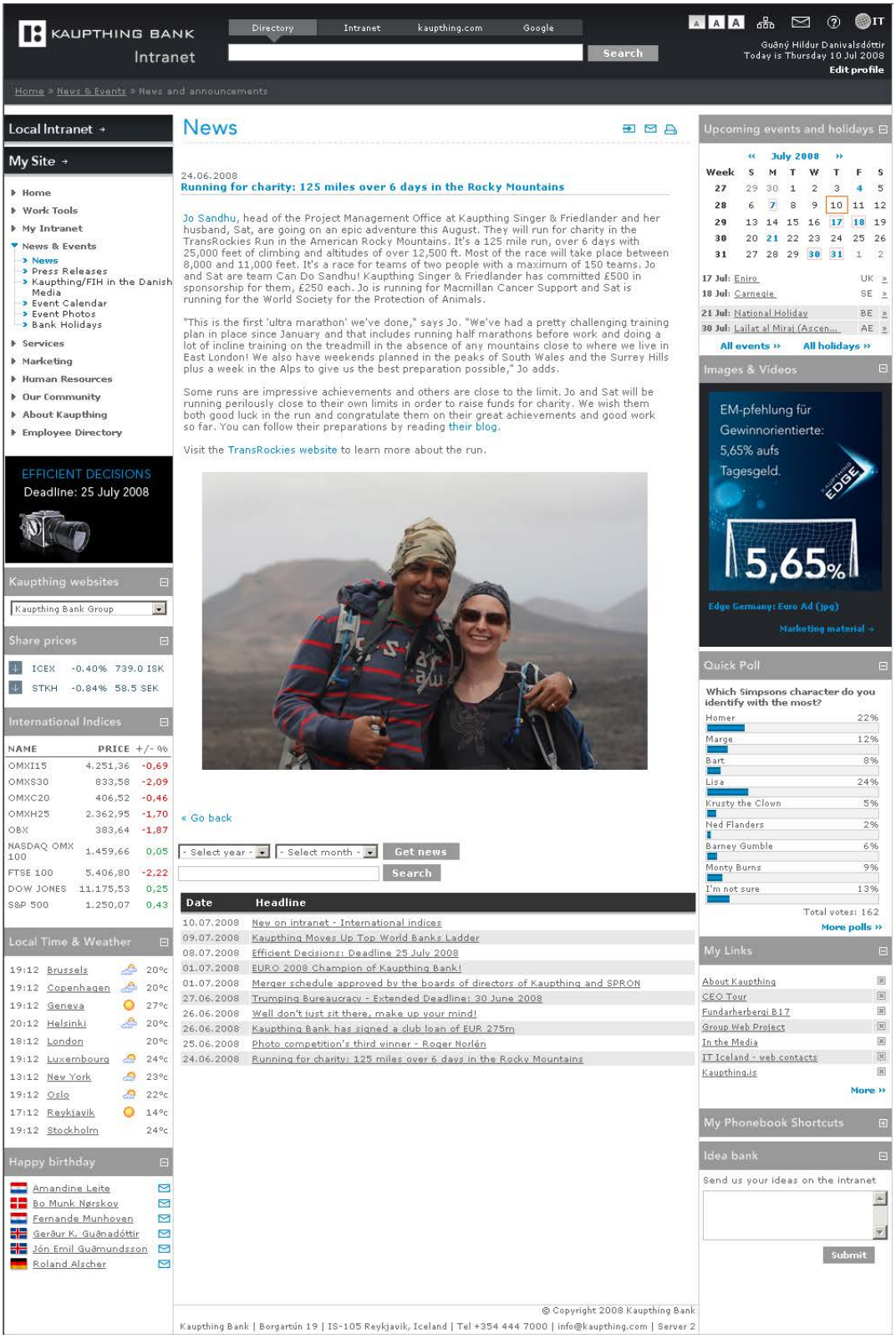


Pictured: A Swedish user's homepage displays a few different items from those displayed for the Icelandic user.

10 Best Intranets: Kaupthing Bank

News writers are prolific at Kaupthing, and the intranet features much exciting news. And many articles are kept relatively short, to keep people's attention. Articles link to related websites and blogs. And good photos that accompany the stories bring them to life and give users another special perspective.

10 Best Intranets: Kaupthing Bank

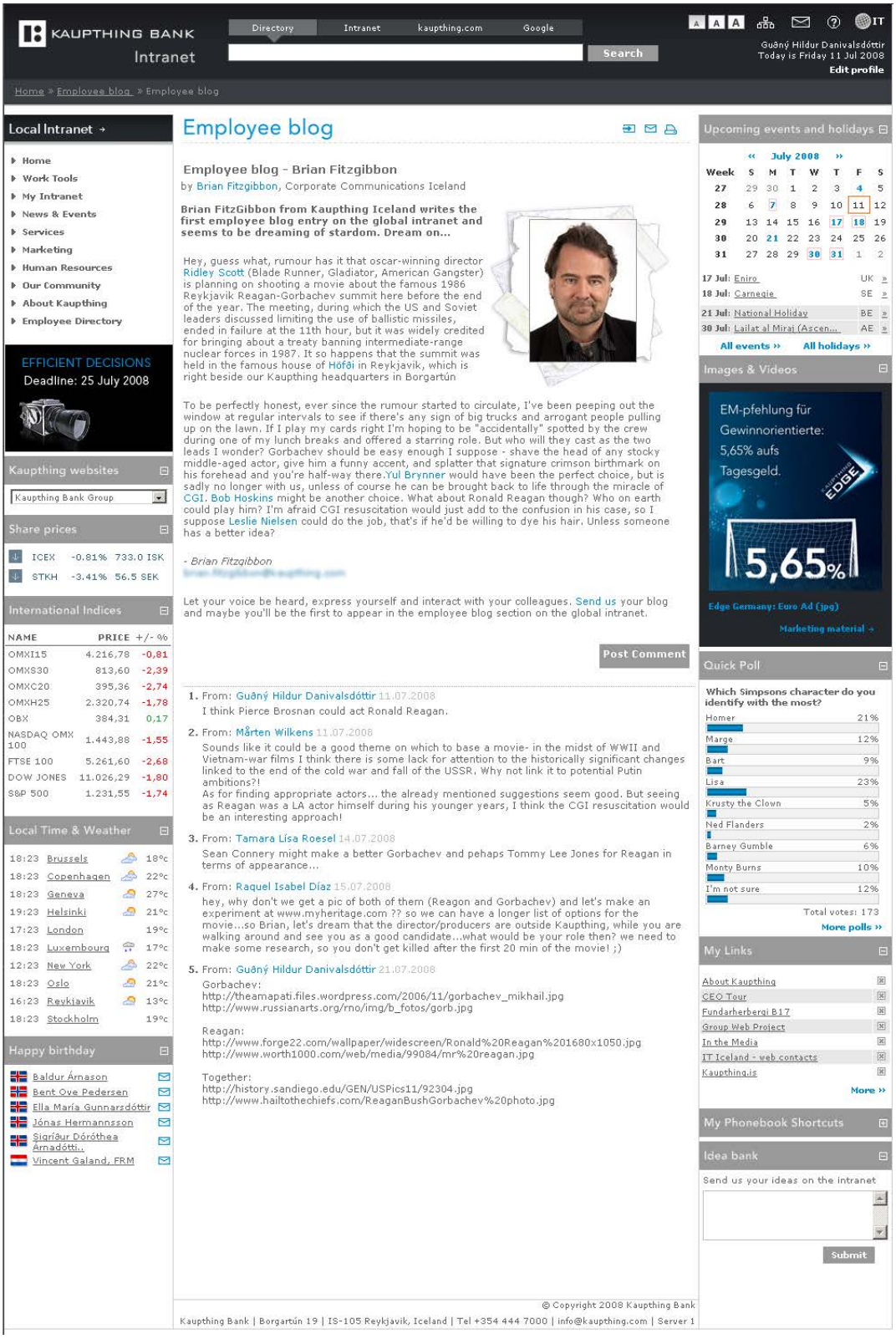


Pictured: A news article describes how a Kaupthing employee and her husband are preparing for a charity event—running 125 miles in the Rocky Mountains in six days.

10 Best Intranets: Kaupthing Bank

Users can also blog on the intranet, so long as the posts aren't slanderous. Employees choose their own topics, and people have blogged about such things as news, business, work-related issues, sports, hobbies, and other personal interests.

10 Best Intranets: Kaupthing Bank

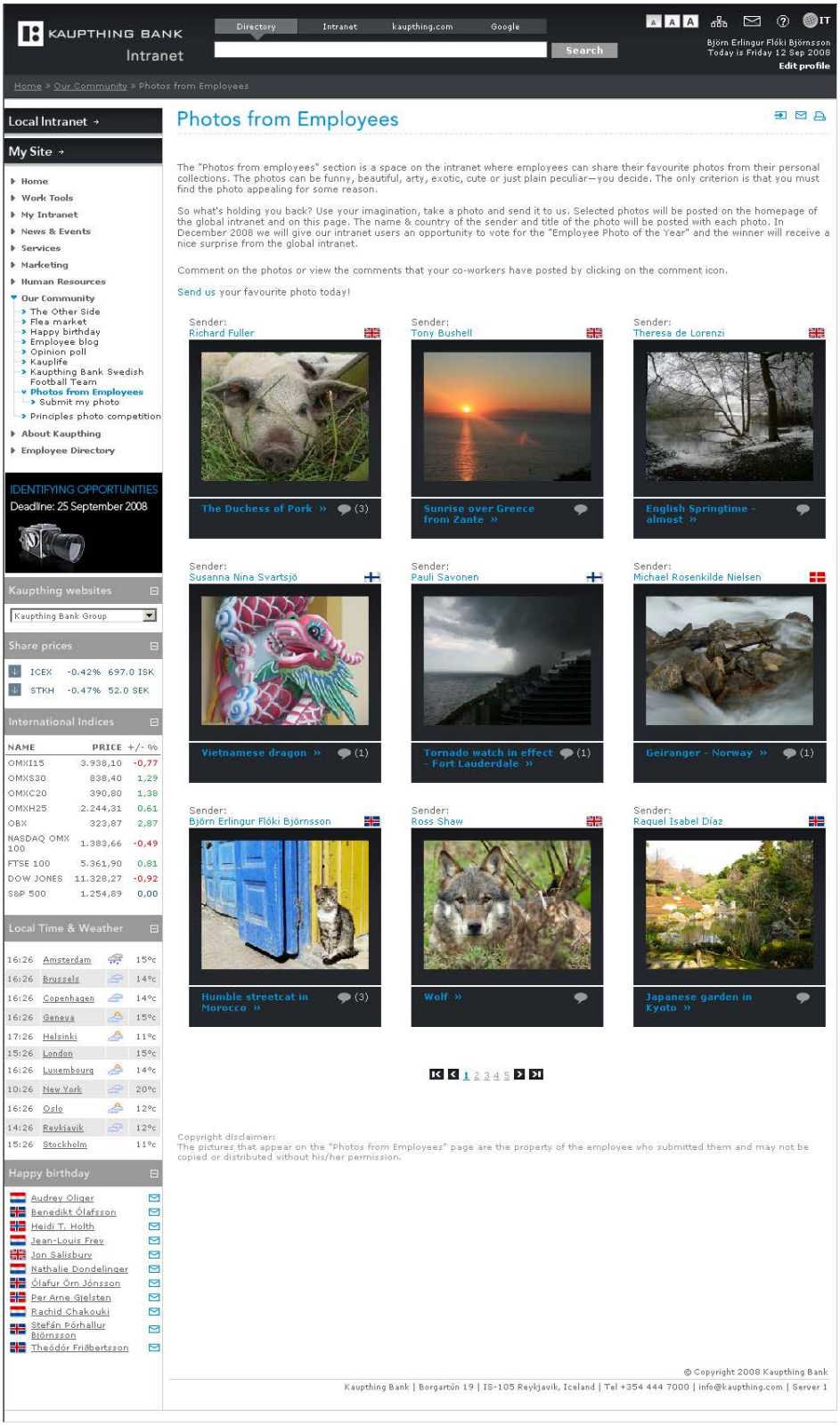


Pictured: Employees can blog about any topic they'd like, whether its work related or not.

10 Best Intranets: Kaupthing Bank

The *Photos from Employees* section is more than a single "photo of the day." Indeed, it offers a whole archive of photos, commemorating the organization's diversity. Users can scan though many photos from days past and, along with each photo, see the photographer's name and the photo's title.

10 Best Intranets: Kaupthing Bank

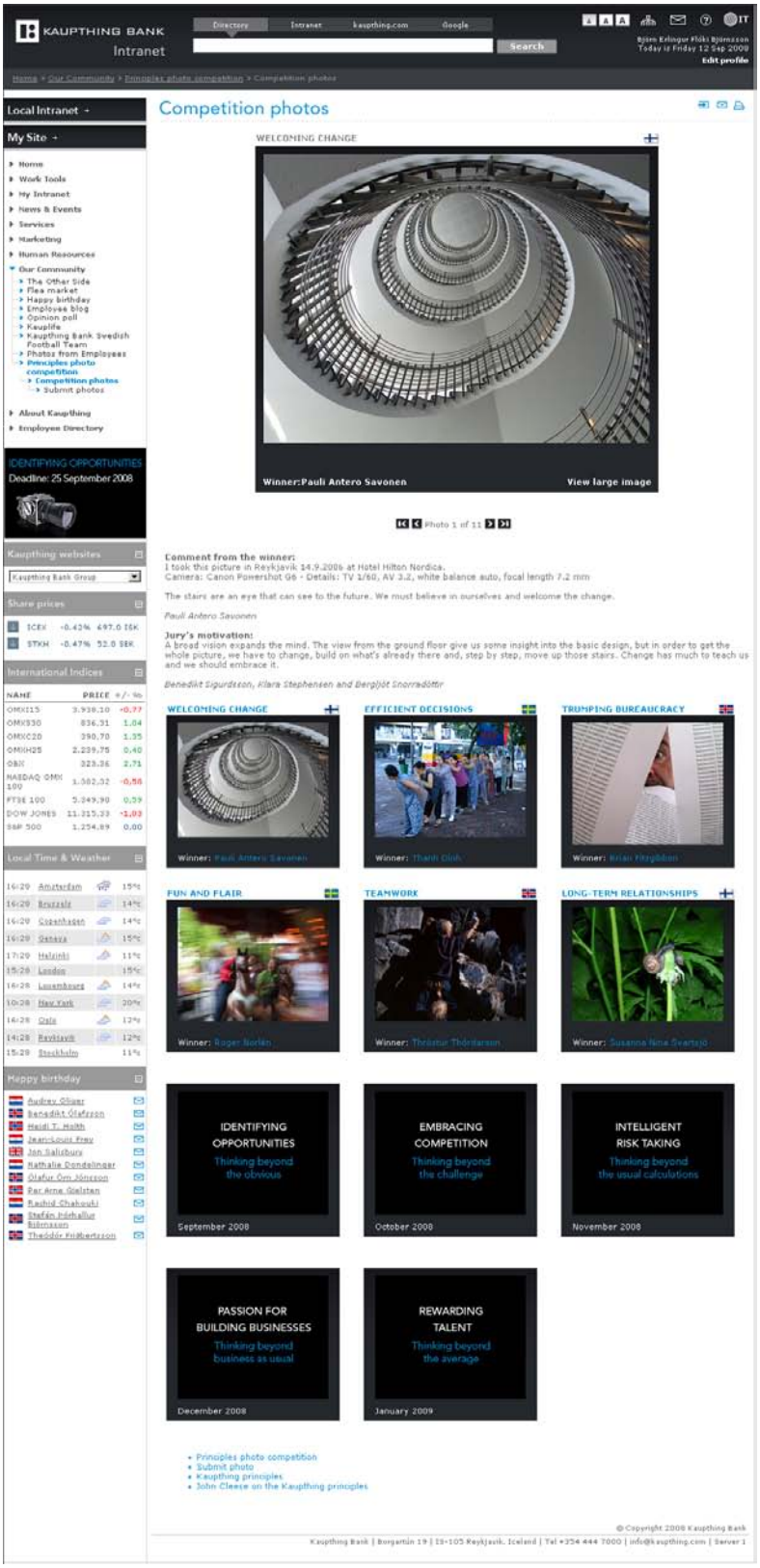


Pictured: The employee photo gallery helps show the diversity of the employees' lives.

10 Best Intranets: Kaupthing Bank

Because Kaupthing employees showed a great interest in photos, the bank started a photo competition around the theme of its corporate principles. Each part of the contest is meant to demonstrate one corporate principle. The winner of each can choose a prize, ranging from an iPod to a portable DVD player. In February 2009, employees will vote for the one picture they feel is the most effective representation of one of the Kaupthing principles. The final winner will get a round-trip airline ticket for two to a European destination of his/her choice. This contest is a great way to get many people involved and thinking about what the bank stands for philosophically.

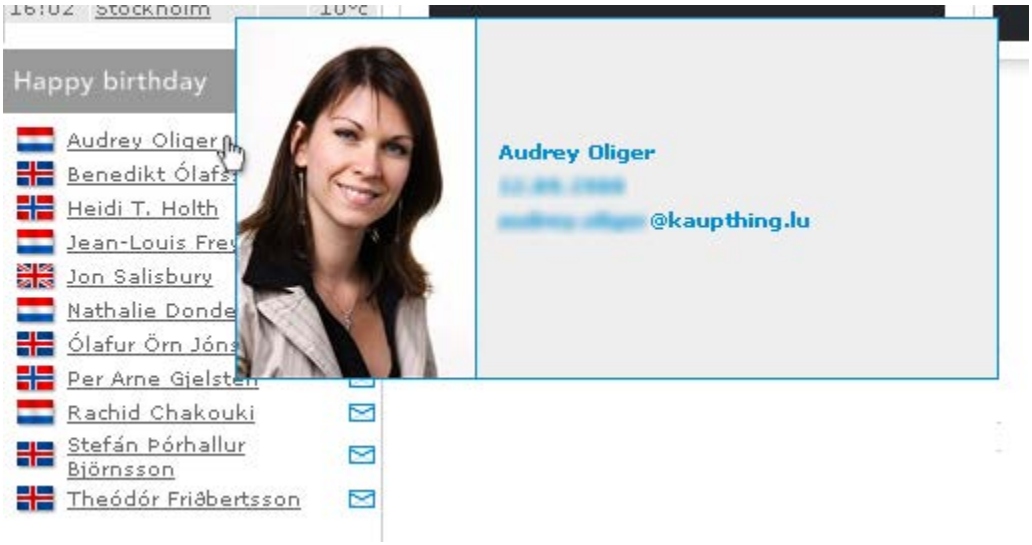
10 Best Intranets: Kaupthing Bank



Pictured: Entries in the photo competition are meant to demonstrate the company principles.

10 Best Intranets: Kaupthing Bank

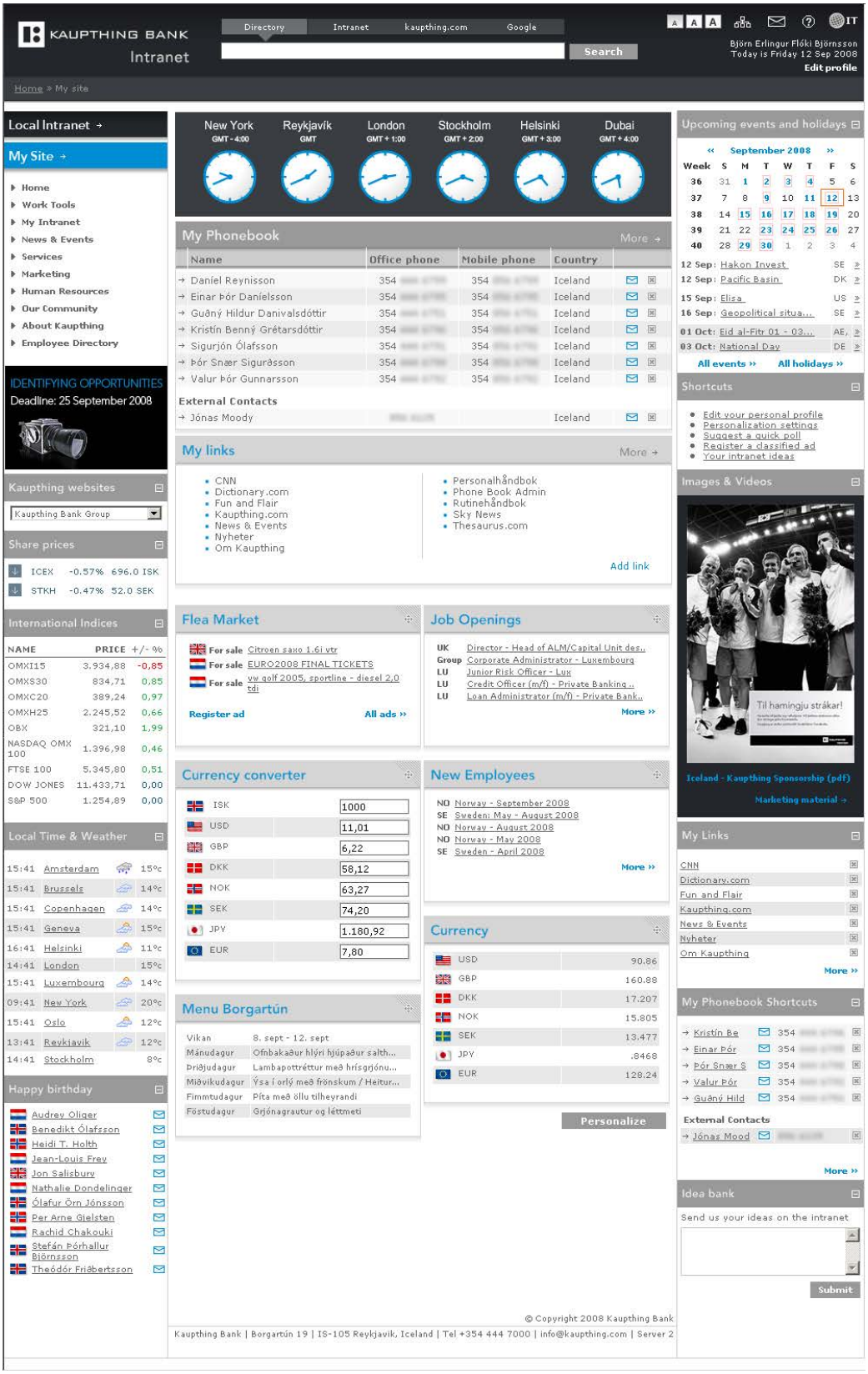
It's certainly nice to be wished happy birthday. On the Kaupthing homepage, users can mouse-over a birthday person's name and see his or her picture, telephone number, and e-mail address. This is a nice way to make people feel special and appreciated.



Pictured: Mousing over the name of someone celebrating a birthday shows that person's name and contact information.

To choose the information and tools that are right for them, users can edit the intranet's *My Site* section, adding or removing components depending on their interest. They can also rearrange the page by dragging items around as they see fit.

10 Best Intranets: Kaupthing Bank

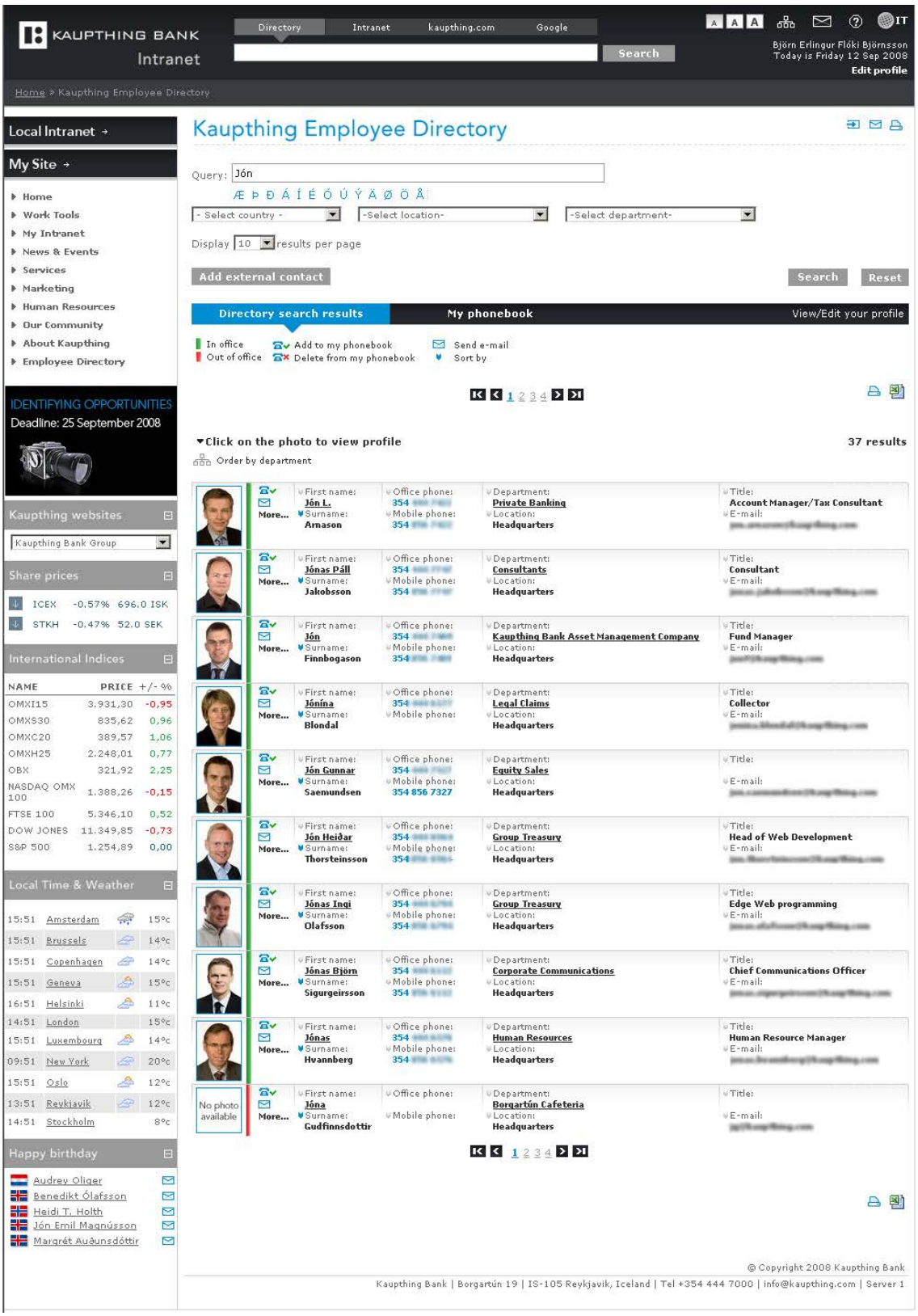


Pictured: Users can customize the *My Site* area as they please.

10 Best Intranets: Kaupthing Bank

The employee search results page is very helpful and modern, displaying the basic information people need without their having to open the profile document. The information is quite legible, even though a lot of it is condensed in a small space. Even a small, but clear picture of the person shows up in the results. Also, for employees in Iceland, the green bar to the right of the photo shows that they're in the office, while a red bar shows that they're out.

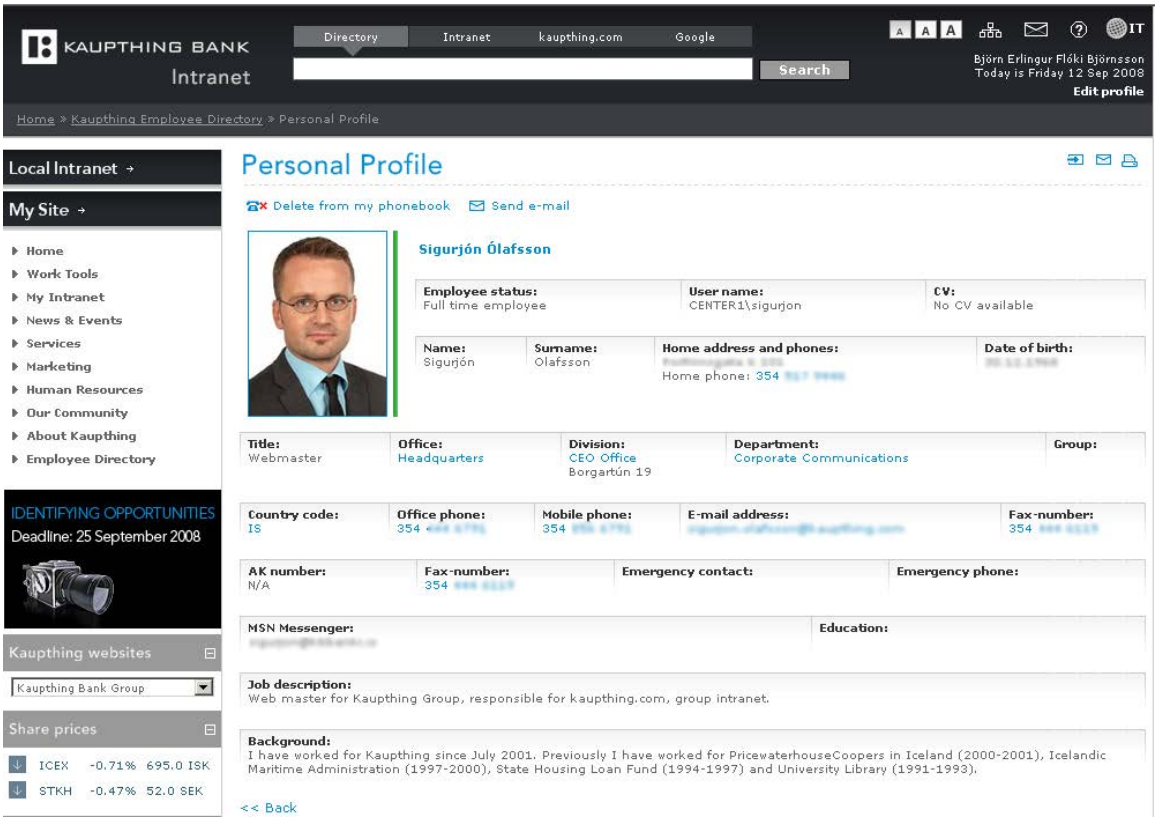
10 Best Intranets: Kaupthing Bank



Pictured: Basic information about people and even a small picture shows up in the search results.

10 Best Intranets: Kaupthing Bank

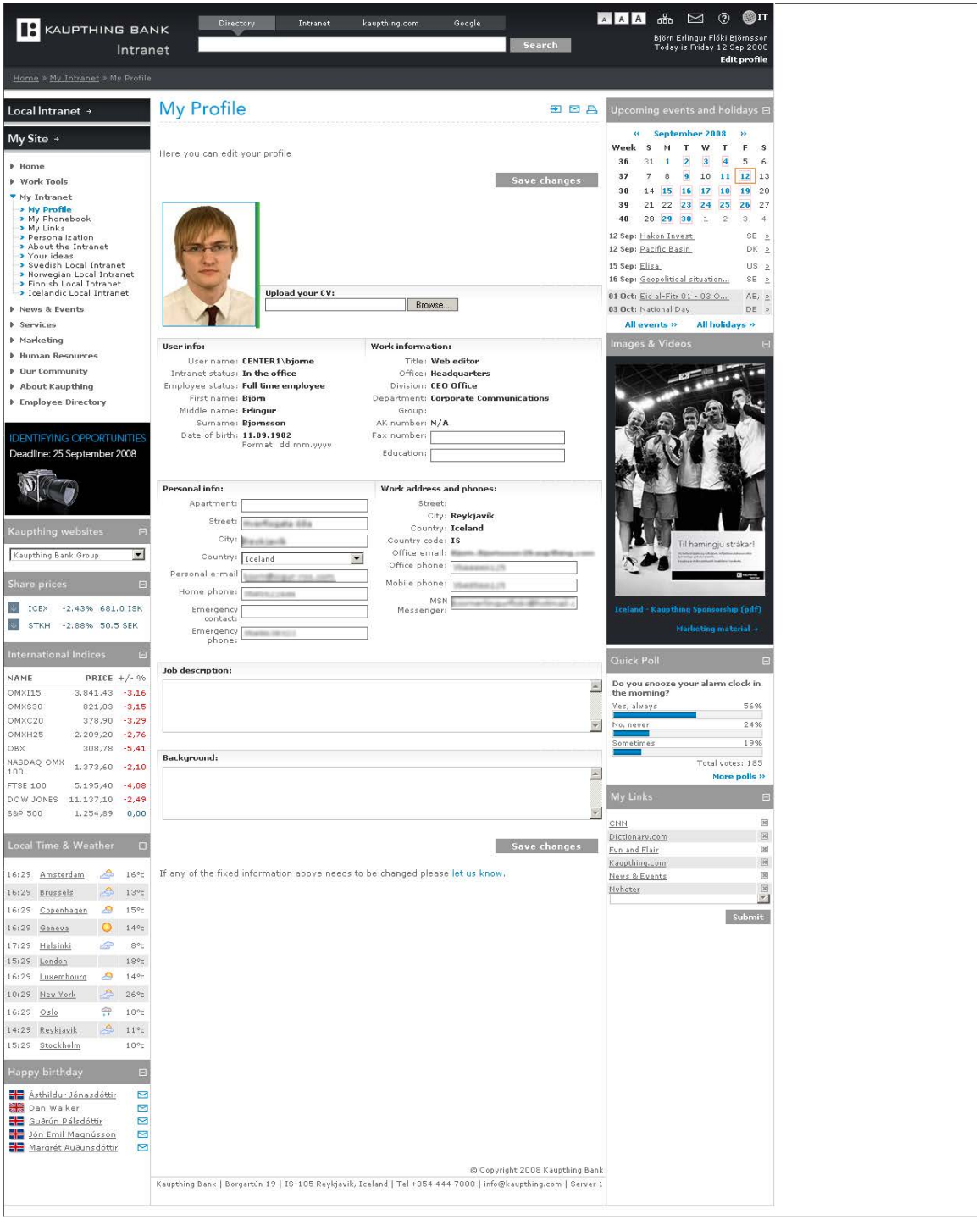
Clicking through to the personal profile gives users all the typical details, a nice photo, and a longer background section provided by the profiled employee. For Icelandic employees, the profile also shows whether the user is in or out of the office.



Pictured: The personal profile page is partially auto-filled and partially filled in by the profiled employee.

Clicking the *Edit profile* link in the upper right opens the logged-in user's profile form. Notice that the top section, *User Info*, is not available for edit by the user. Users can submit changes to this information by clicking the *Let us* know link on the page. In contrast, users can edit the lower sections—*Personal info*, *Job description*, and *background*—on the spot. This lets employees share information about themselves with their co-workers, and is another way in which this intranet takes a more personal approach than just business as usual.

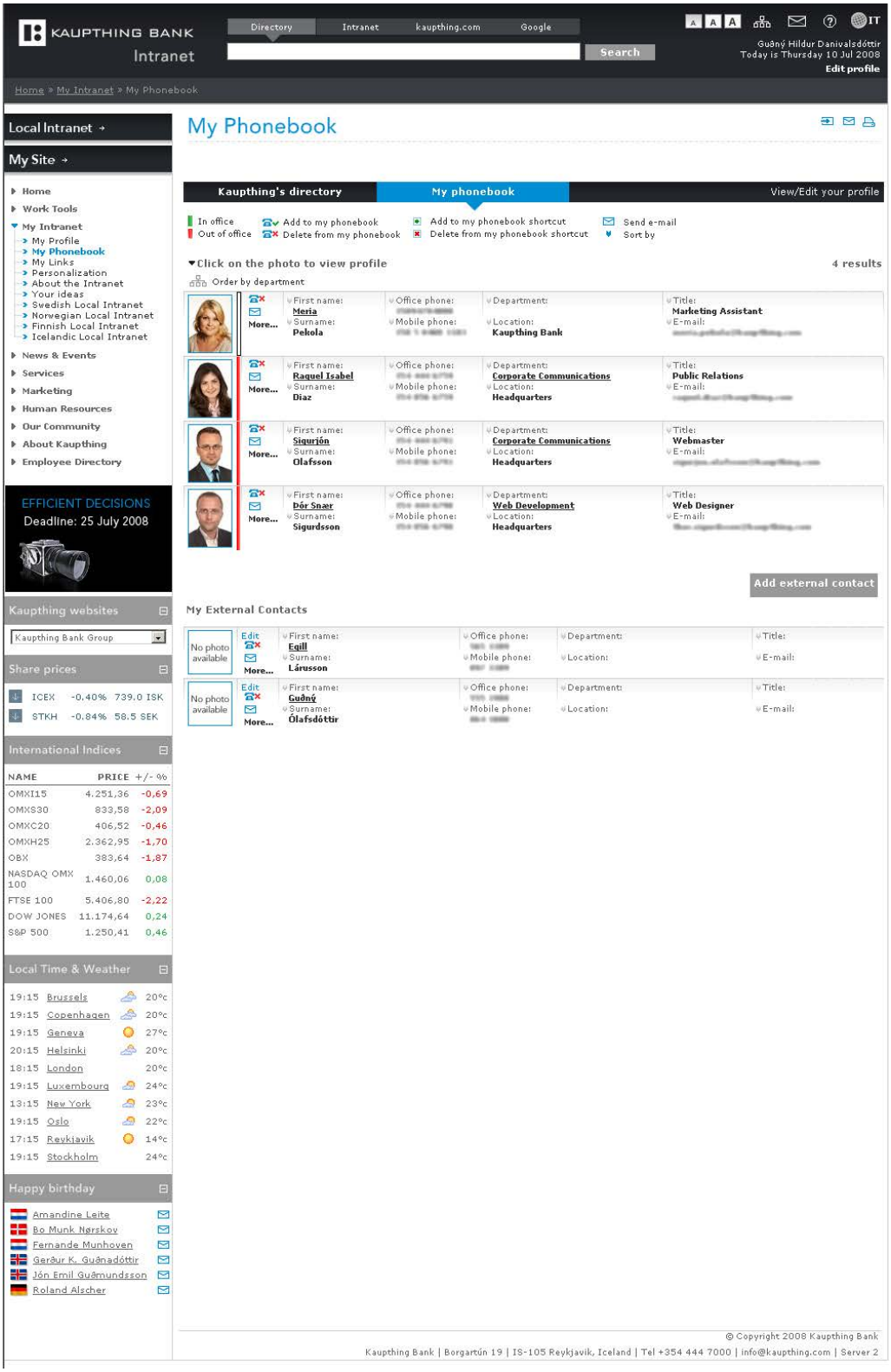
10 Best Intranets: Kaupthing Bank



Pictured: Users can edit the personal information in their profile and send a message to have other information changed as needed.

Under *My Intranet*, the users *My Phonebook* can store information about other employees, as well as people who don't work at Kaupthing Bank. Co-workers appear in the top section, and people who don't work at the bank appear under the *My External Contacts* section. Users can easily add profiles by clicking the *Add to my phonebook* link.

10 Best Intranets: Kaupthing Bank

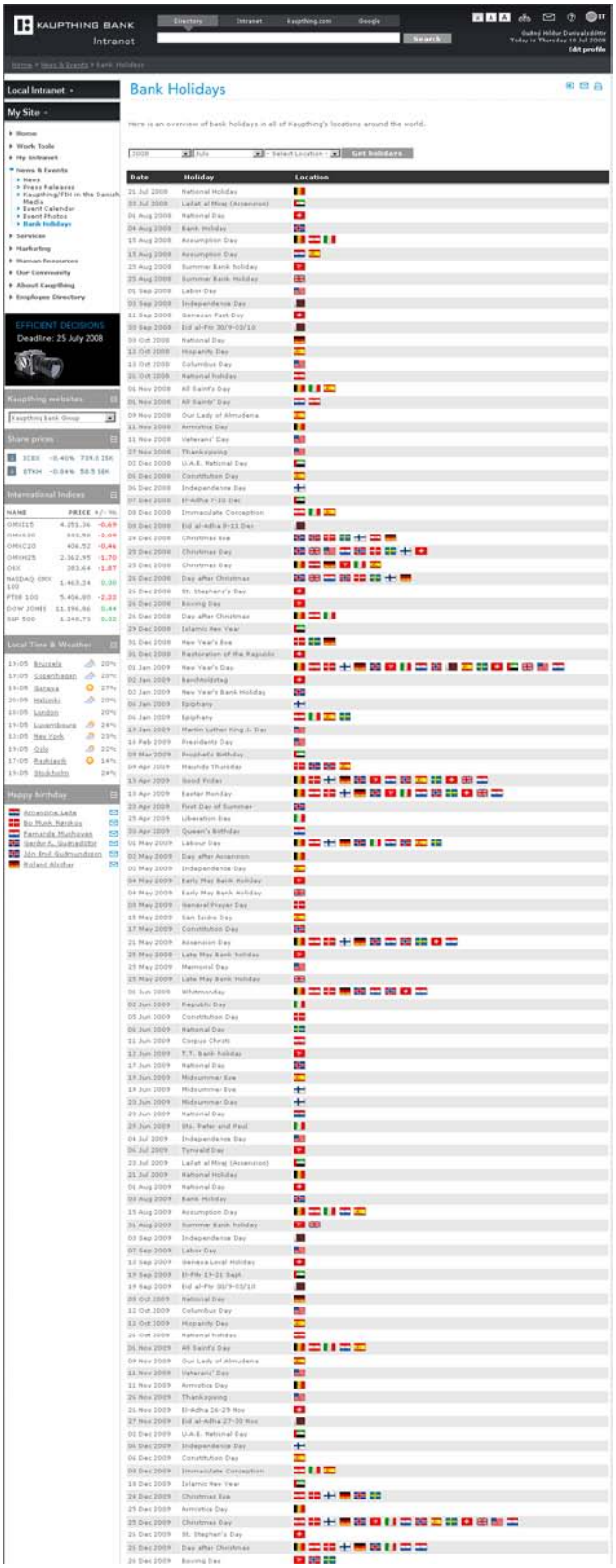


Pictured: Users can store phone directory entries for people both inside and outside the organization.

10 Best Intranets: Kaupthing Bank

Another somewhat personal element on the intranet is the reminder of bank holidays—that is, the days employees have off. The holidays are listed in chronological order. The listing includes the holiday's name and the flag of the countries that celebrate it (and thus close their banks that day). Users can also sort the list by criteria other than date, such as location.

10 Best Intranets: Kaupthing Bank

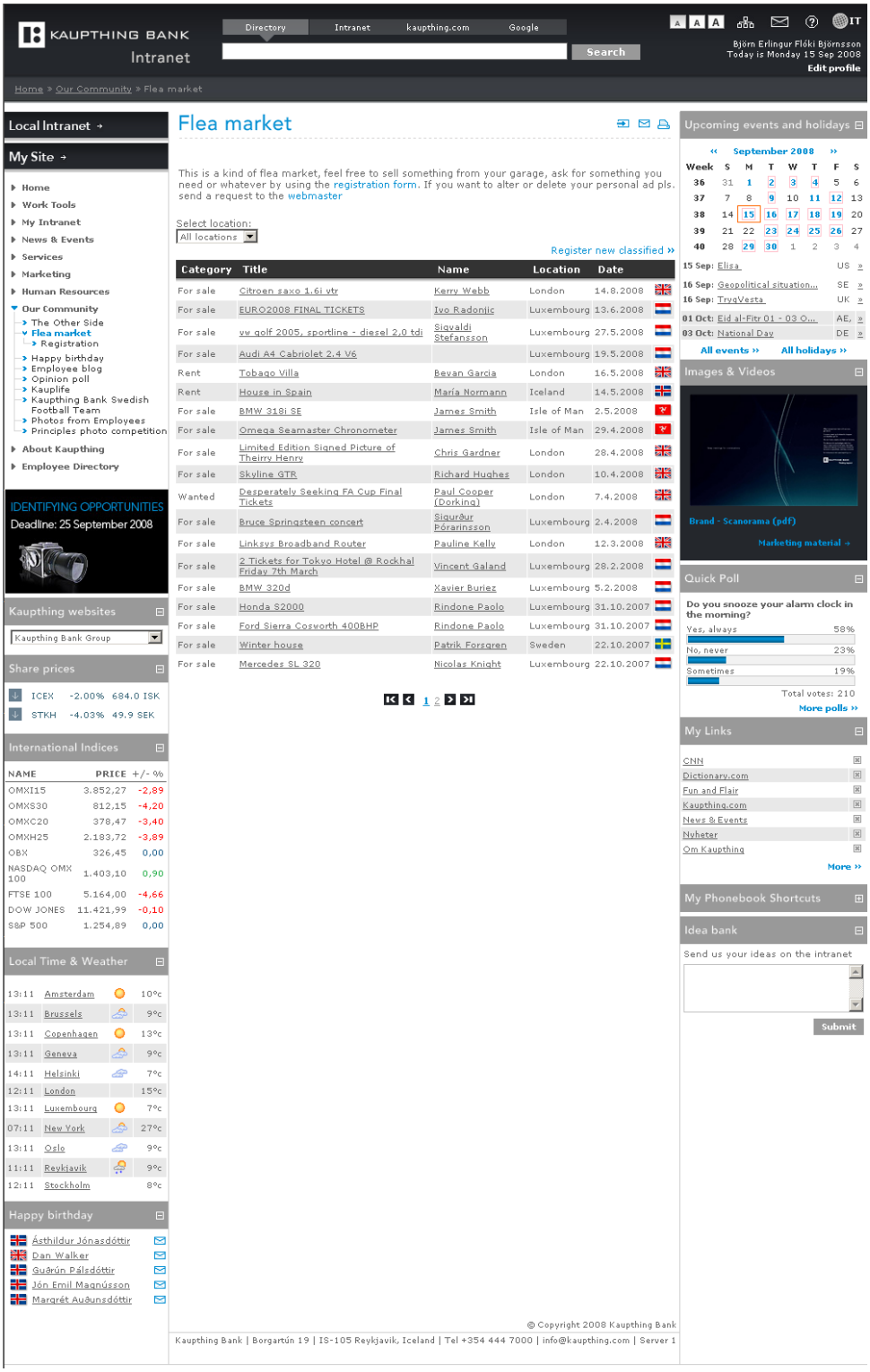


Pictured: Bank holidays are listed with the date and flags of the countries that celebrate them, indicating which employees get the day off.

10 Best Intranets: Kaupthing Bank

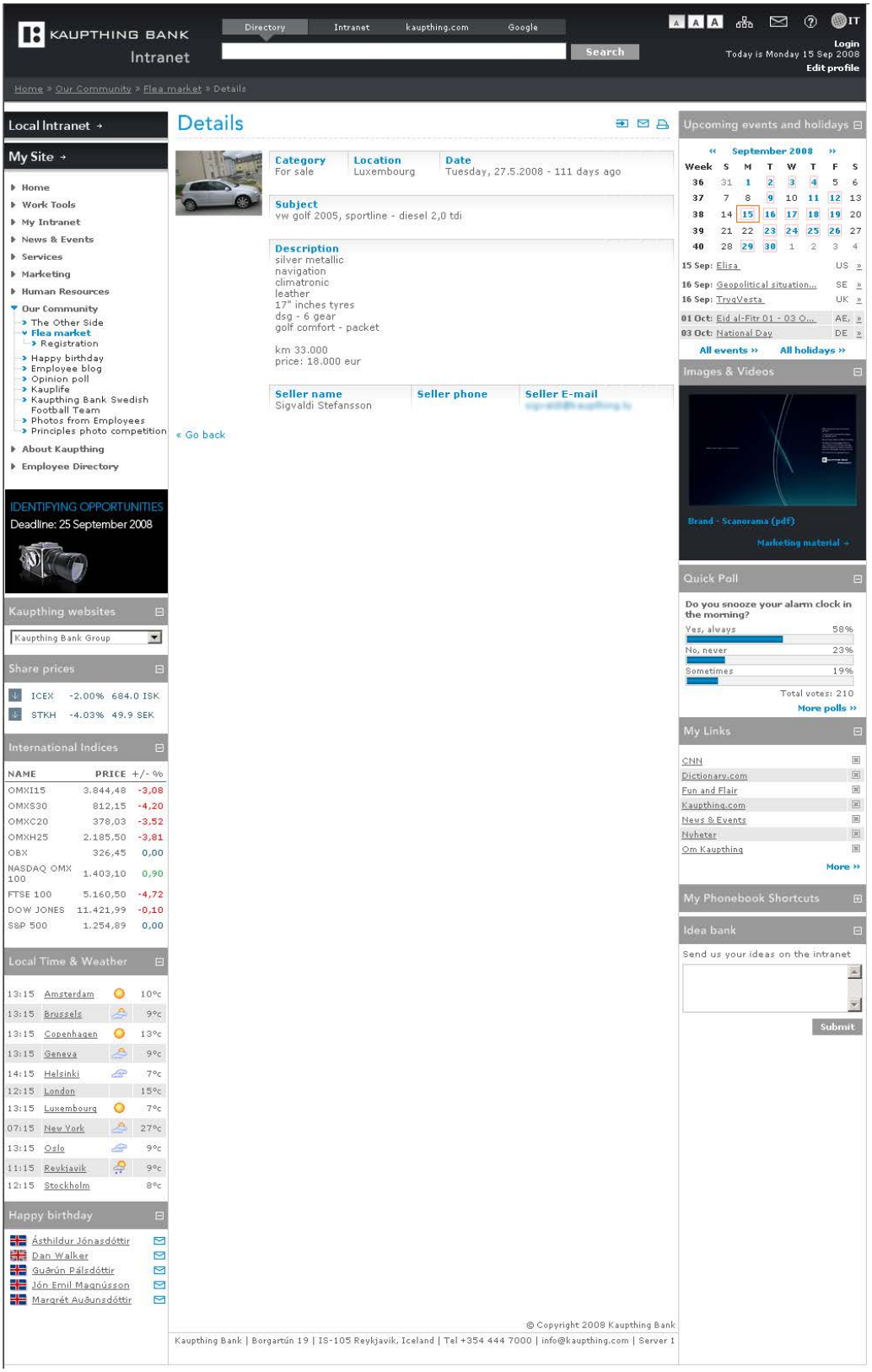
A *Flea Market* page lets users buy and sell items with their colleagues. Users can choose a category for the item, the location, subject, date, and description. An optional photograph can help make a sale.

10 Best Intranets: Kaupthing Bank



Pictured: The intranet sports its own online international *Flea Market* where Kaupthing employees can buy or sell anything they wish. The *Flea Market* page lists all classified ads posted; each is marked with the flag of the country it comes from. Users can browse ads by country or select "all locations" to view all entries.

10 Best Intranets: Kaupthing Bank



Pictured: A *Flea Market* feature lets users buy and sell items with their colleagues.

The Bank's investment in work tools and communication is matched by its commitment to respect and embrace all employees on a more personal level. The intranet designers were able to do this effectively, offering interactive features and good content about people without overdoing it or making it seem forced. This strong emphasis on employees "after hours" shows that the organization gives reverence to the human being inside and outside of the office.

BACKGROUND

Global Intranet 1.0

Kaupthing Bank launched its first global intranet on November 17, 2005. Since its inception, the global intranet has played a key role in the bank's corporate communications. It brings together the entire organization, uniting 14 offices around the globe into a single forum.

That kind of broad initiative was possible because of the project's strong backing from the highest ranks of the company. "From the very beginning, the intranet project enjoyed very strong backing from the CEO, Hreidar Már Sigurdsson," says Sigurjón Ólafsson, Kaupthing webmaster. "Which enabled the intranet team at that time to access all the resources needed to reach the optimistic goal of setting up an intranet in such a tight timeframe [four months]."

The company's leaders backed a global intranet initiative because of the value they placed on the intranet as a communication vehicle. The CEO addressed users on the new intranet in a welcome video, where he said: "The Kaupthing Bank global intranet plays a key role in the bank's corporate communications…. It is my belief that this intranet serves as an effective tool to hone our communication network and further establish the culture of Kaupthing."

In the beginning, the global intranet was only a default page for offices that lacked their own local intranet. Over time, the company has reached its goal of having the global intranet be the default start page for all Kaupthing offices.

An important milestone in the site's development was the addition of a Web editor/project manager in spring 2006. This person was hired to help make the intranet a top priority. "Since then, we have seen a continuous evolution, with frequent updates and new features," says Ólafsson. "We have also sought feedback from users in an intranet survey conducted in November 2006."

Global Intranet 2.0

The intranet project was initiated in 2007 along with a new corporate brand identity that applied to new external websites and new marketing materials for the bank. This project resulted in the site redesign that is discussed here. It launched on January 21, 2008.

Along with the global intranet re-branding, four re-branded local intranets were launched simultaneously in Iceland, Sweden, Finland, and Norway.

The redesigned intranet included the same main sections and main functions, but various new features were added, including:

- ***My Site*.** All personalization is aggregated on this one page.
- **Employee directory.** Users can add external contacts to their phonebook and use a page selector to move to the page number they prefer in the search results.

- **Local news box.** Users who have local intranets (Iceland, Sweden, Finland and Norway) can follow their local intranet news through the global intranet.
- ***Photos from Employees*.** Employees can share favorite photos from their personal collections with other Kaupthing employees around the globe.
- **Personalization.** Users can edit their profiles, choose personalization settings, create their phonebook, and collect links.
- **Interactivity.** Users can suggest a news article, add an event, suggest a poll, register a classified ad, send suggestions to the intranet team, and so on.
- ***Happy Birthday*.** Pop-up and mouse-over name cards on the homepage offer a daily list of employees who are having a birthday.
- **World map.** Users can zoom in and click on links to get information about all of the Kaupthing offices.
- **Live analog clocks.** The clocks give users a simultaneous view of the time in six cities (in all Kaupthing office time zones), displaying the time differences between the cities. Users can move the mouse over the clocks to see the time in digital format.
- **Employee blog.** Blogs offer a venue for employees to express themselves and interact with their colleagues. Employees choose the topics and all comments are attributed to the blog owner.
- ***Do you know your colleagues?*** Every week, five employees are chosen randomly to appear in this section. The idea is to introduce all of Kaupthing's employees around the globe on the intranet.
- **Kaupthing's principles photo competition.** A photo contest for Kaupthing employees includes 11 separate themes based on each of Kaupthing's 11 business principles. The winning photo for each theme is posted on the intranet and the winner can choose a prize.
- **Internal marketing.** In this series of videos made specifically for the bank's employees**,** John Cleese introduces Kaupthing's core principles.

INTRANET TEAM

The intranet team is in Corporate Communications, which is part of the CEO Office. Placement within that department has had a positive impact on the site's development because the team has always been able to rely on top-tier management for support. "It has been very important for the development of the intranet to be part of Corporate Communications, enjoying 100% support from executive management," says Ólafsson.

When the site launched in 2005, Corporate Communications had only one Web employee who was responsible for both the external websites and the global intranet. In 2006, the company hired a Web editor whose main responsibility was the intranet. The Web team currently consists of three full-time employees who share responsibilities among websites, the intranet, and other Web-related projects, such as HTML newsletters. Only one of the three people's time is fully allocated to the intranet.

The three roles that are supported internally are intranet project manager/Web editor, webmaster, and Web editor. The team also has a translator who proofreads all news and copy published on the intranet. The bank's IT department runs the websites and acts as a project manager for the programming, which is nearly all outsourced to an agency, Eskill.

The core team has access to two to three external programmers and a graphic designer in the Marketing department who serve as supplemental resources.



Pictured: (back row, left to right) Daníel Reynisson, team manager–IT; Björn Erlingur Flóki Björnsson, Web editor; Sigurjón Ólafsson, webmaster–Global; Thór Snaer Sigurdsson, graphic designer. (Front row, left to right) Gudný Danivalsdóttir, intranet project manager and Web editor; Kristín Benný Grétarsdóttir, webmaster–Iceland; Hrefna Arnardóttir, programmer/project manager–Eskill.

Working with Agencies

Because the core intranet team is so small, they rely on outside agencies to execute various components of intranet projects, especially in the areas of programming and usability. That was the case for both the initial launch in 2005 and, to a lesser extent, the 2007/2008 redesign project. Expanding the Web team from one person to three between those releases enabled them to take on more of the work in-house.

For the initial site release in 2005, the bank worked with a variety of outside vendors. Initial site planning was done internally (need analysis and wireframes), and two outside consultants were called in—one to consult on technical issues, and one to manage the overall project and interface with Ólafsson. Two freelance graphic designers were contracted to create design proposals for the site.

During the 2007/2008 redesign project, the team worked closely with an agency, Eskill, to do the programming, while another agency, SJÁ conducted the usability

test sessions. For this project, the in-house graphic designer, Thór Snaer, created the new design to align with the new Kaupthing brand identity; the project was also managed internally.

For the Kaupthing team, agencies have become an integral and valuable component of the process. "Working with agencies, which we actually also look on as partners, has been very fruitful in both of the aforementioned intranet projects," says Ólafsson.

"Eskill has not only executed our ideas, but also come up with many technical solutions and ideas, and acted as a consultant throughout the projects. Working closely with Web usability consultants has also made a difference and certainly improved usability."

GOALS AND CONSTRAINTS

Goals

While the primary driver of the redesign was to align the site with the bank's new brand identity, the team also wanted to make some needed improvements to the site's features and functionality. "At the same time, we wanted to improve key features of the intranet, add new features, meet requirements and ideas we had received from users, and generally make the intranet more interesting for Kaupthing employees," says Gudný Danivalsdóttir, intranet project manager and Web editor. Another objective of the redesign was to offer more fun and usable features to draw people to the site. "We increased interactivity, personalization, and usability, and implemented Web 2.0 to some extent on the intranet by encouraging employees participation, contributions, communication, communities, and visibility," she says.

They accomplished these goals with features such as employee blogs, *Photos from Employees*, the business-principle photo competition, and the *Do you know your colleagues?* feature. Currently, the team is working on directory improvements, including Ajax search and additional advanced search options.

Danivalsdóttir says that goals for the company's intranet include:

- Create an engaging homepage with dynamic content to encourage daily use
- Centralize company information and internal announcements
- Enhance channels for corporate communications already in place
- Strengthen the corporate culture by increasing internal marketing and awareness of business principles
- Offer useful information and tools
- Create fun features to draw people to the intranet
- Offer interactivity and opportunities for involvement

Constraints

"The main constraint we faced in the redesign process was adjusting the functions and design to different browser types," says Danivalsdóttir. Most Kaupthing employees still have Internet Explorer 6 as their default browser, but some already have IE7 and most will upgrade to it soon. "Since programmers prefer to work in Firefox and IE7, they had to fix all the design and functions for IE6," she says.

"The difference between Firefox and IE7 is minimal, but the difference between IE7 and IE6 is far greater," says Danivalsdóttir. "The IE6 fixing took much longer than anticipated, causing delays and cost increases."

Creating all the new stylesheets, page components, and new pages and functions for the five intranets was a time-consuming task—one that had to be completed before the launch weekend.

"Another constraint we faced was developing the redesign in the production environment," she says. "Therefore, the final changes, when we eventually launched the new design, had to be done over a weekend."

"The downside of working on the redesign in the production environment in a hidden/locked section in the LiSA CMS is that you can only get a partial view of the new design and can't view the website as a whole in the new look, so there is no overview," says Danivalsdóttir. "You don't see all the intranet pages prior to the launch or until all the stylesheets have been changed."

"The locked section included only the new homepage, section overview pages, sub-pages, new pages and functions, and pages with all the main stylesheets in the new design," she says. "There is some risk involved, since there is always the possibility you'll forget some minor things in the process or that something doesn't work when the website goes live—you only have the weekend to fix it."

Security

Another challenge for the Kaupthing global intranet involves security issues. Enabling employees across all locations to access the site and its information, while still maintaining security and privacy, has been difficult.

"The main constraints we faced during this process had to do with technology—connecting new offices Kaupthing had acquired and giving their employees access to our intranet," says Ólafsson. "For obvious reasons, a bank has very strict rules about giving external access to its IT environment, and this has often been a long and difficult process."

"Our intranet site is authenticated via strong domain authentication to allow website personalization and employee access to update their profile information," says Bjarni Ólason from the bank's IT division. "This also allows us to use the intranet website to host many sub-Web applications with good security. This has been a challenge when new companies that do not have our domain infrastructure are added to the group. We are investigating domain user account provisioning tools to help tackle this issue."

TIMELINE

In February 2007, Kaupthing launched new external websites to align with its new brand identity. Later that year, the bank decided to also migrate the intranets to the new branding. "After some investigation," says Danivalsdóttir, "a decision was made to modify the stylesheets rather than create new websites from scratch." They chose this solution to meet the tight timeframe for the project (just a few months).

On January 21 2008, five intranets were launched simultaneously in the new design (Global, Iceland, Finland, Sweden, and Norway). "During the weekend of 19-20 January, a group of programmers and Web editors changed the stylesheets and fixed details, functions, and errors on all the intranets," says Danivalsdóttir. "When employees arrived to work on Monday morning, 21 January, the new intranets were already up and running."

The timeframe for both intranet projects was short. “We cannot recommend such a tight timeframe because these months were simply crazy and we were very short of internal staff,” says Ólafsson. “There were very long hours for the whole period. But having a fixed deadline can also be a great incentive to achieve goals. We could, of course, have spent one to two years creating the intranet, but that was not an option.”

They did their best to get input from key stakeholders in different Kaupthing offices along the way, but such a compressed project schedule meant that the team could not consult all the offices in detail about the project.

GLOBAL INTRANET V.1 TIMELINE: 2005	
July	Excel wireframe
July–August	Graphic design and needs analysis
August–November	User testing and heuristic evaluation; screen flow
September–November	Programming

GLOBAL INTRANET REDESIGN TIMELINE: 2007/2008	
October–November	Needs analysis, new functions, and graphic design
November–January	Programming and testing
January	User testing, fixes, and changes to stylesheets prior to launch

USERS

The intranet serves approximately 3,200 employees in 13 countries. Their roles reflect the bank's services, including: corporate and retail banking, investment banking, capital markets services, treasury services, asset management, and wealth management for private banking clients.

USER TASKS

“The most important feature on the intranet is, without a doubt, the employee directory,” says Danivalsdóttir, adding that employees use it often to find employees and also to search for lists of employees in divisions, other countries, and so on.

Other important features include news and announcements from the bank, press releases, access to marketing material, the Bank's share price, and holidays and events.

The site’s core features are:

- News and announcements
- News from the local intranets
- Press releases from the Bank
- Event calendar (company meetings, corporate events, tradeshows, and so on)
- Holiday calendar for Kaupthing’s countries of operation
- Weather and local time for Kaupthing's countries of operation

10 Best Intranets: Kaupthing Bank

- Live financial information, including share prices and international indices
- Notifications of new employees and job openings
- Kauplink file archive
- *Happy Birthday* announcement on homepage
- *The Other Side* weekly employee Q&A
- Weekly opinion poll
- *Do you know your colleagues?* introducing five randomly selected employees each week
- Kaupthing's *Principles* campaign (internal marketing), including:
    - John Cleese introducing the 11 Kaupthing principles
    - An employee photo competition
- Information about new products and services
- Latest ad campaigns with archive of brand and marketing materials
- Access to image/brand site (logos, images, fonts, PowerPoint presentations, and so on)
- Searchable company directory with photographs and detailed information
- Search engine that searches the intranet and Kaupthing's public websites, and has an integrated Google search box for general Web search
- Shortcuts to Kaupthing's public websites (in a drop-down list)
- *My Site* personalization, including:
    - *My Links*
    - *My Phonebook* with internal and external contacts
    - Personalized area with drag-and-drop personalization components
- Features standard to every page, including:
    - *Print this page*
    - *E-mail this page*
    - *Add to My Links*
    - *Rate this page*
- Various work tools, such as access to databases, account numbers, computer tips, English language tools, travel information, glossary, and so on
- Extensive information about each Kaupthing office, including location, pictures, videos, maps, telephone, fax, and other contact information
- A list of hotels, airports, restaurants, and transportation services in the area of each office
- Interactivity, including:
    - *Photos from Employees*: employees send in their favorite photos
    - Employee blogs: employees write about what interests them
    - Employees can change their profile on the company directory from the intranet
    - Employees can post classified ads in the *Flea Market* (subject to approval/proofreading)
    - Employees can also send in news stories to publish (subject to approval/proofreading); suggest opinion poll topics; send suggestions for improvements; and rate every page on the intranet
- Employee competitions, such as World Cup 2006, Euro 2008, and intranet surveys

DESIGN PROCESS AND USABILITY ACTIVITIES

The launch of the new Kaupthing Bank brand in early 2007 provided the impetus for the site's redesign. And, unlike the 2005 project, the emphasis this time was on creating a uniform Kaupthing culture across more than 10 countries.

Planning for the project can be tracked back to 2006, just a year after the original site launched. At that time, the intranet team conducted a survey on the intranet, giving employees a list of certain features or items and asking what they'd like to see more of on the site. Among the items on the list were news stories from around the group; practical information, such as share prices, a currency converter, and travel information; information from senior management; and blogs. Employees were also encouraged to contribute general suggestions and list their ideas for an improvement.

"We got a fantastic response and a lot of ideas from users," says Danivalsdóttir. "Hundreds of people showed their interest by sending in their feedback." She says this great response was at least in part due to the fact that respondents were automatically entered in a drawing to win an iPod.

The team used many of the ideas and comments from the survey to improve the site. "We also follow logs closely by using Web metric tools like Google Analytics," she says, adding that they use annual Nielsen Norman Group reports as well. "*Intranet Design Annuals* over the years have also been very useful in improving our intranet."

User Response

Below are some examples of intranet suggestions the team received from users in the November 2006 survey. "It was a pleasant surprise to see that the users had a wealth of inventive ideas on the intranet," says Danivalsdóttir, adding that they "might never have come forth without the survey."

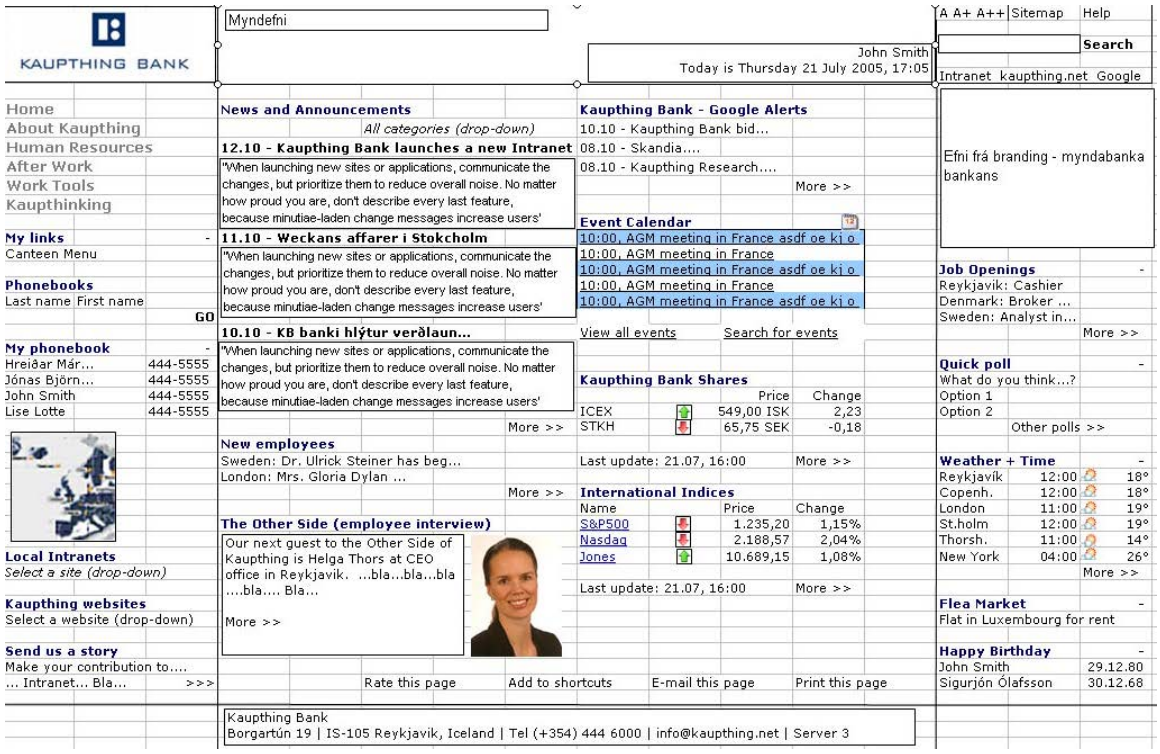
What the users said:

INTRANET SUGGESTIONS FROM A 2006 USER SURVEY
"Online international discussion groups on different topics, we could call it 'Topic of the Day.'
"Simple but efficient market monitor not only with ICEX but UK, NORDIC and US data for all people not linked to Bloomberg directly." *"Latest news from around the world as a pop-up when you log onto the Kaupthing intranet...like access from BBC news without logging on to their web site or any other news site."*
"How about a weekly tip - e.g. telling you where on the intranet you can get information, e.g., where you can get the logo - I only found this out recently and I know my colleagues hadn't found it either."
"Access to the intranet outside work through login/password. Option of printing my phone book in single page w/ minimal layout - picture - name - phone 1 - phone 2 - mobile - etc. An option to get a reminder of people added to your phone book. An option to get a reminder of an event in the events calendar. Either to outlook, mobile or through e-mail. More chances to win free things!"

10 Best Intranets: Kaupthing Bank

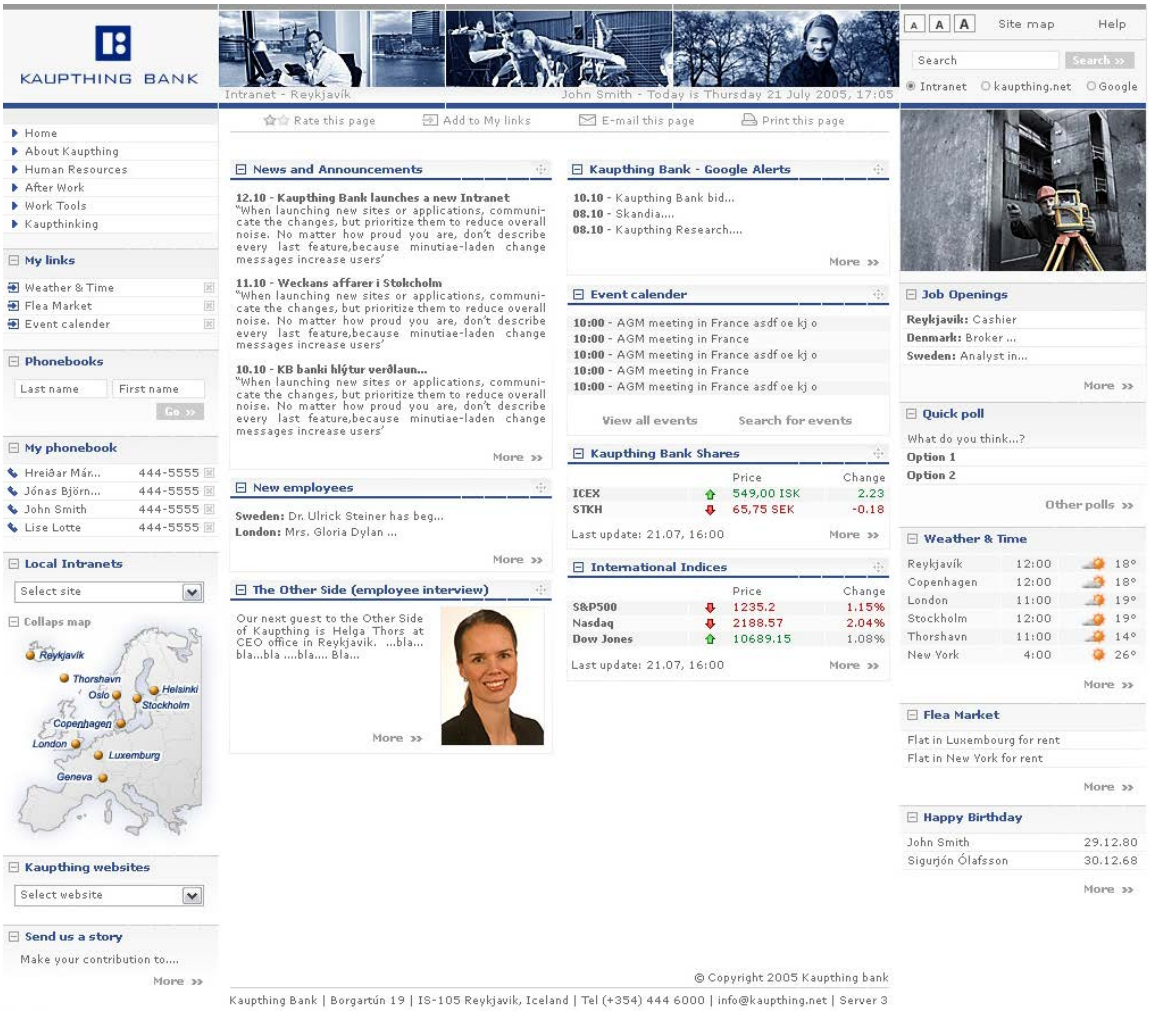
"Practical information such as info about the meeting rooms in all our offices i.e. how many seats, what equipment etc."
"Great site, practical yet fun. We have an SMS capability in the Glasgow office and find it to be very useful indeed, I would imagine that almost every department in the group would find it similarly useful."
"Organizational charts for each unit and business area."
"Hottest tips from the research department announced on a "billboard" so every one can spread Kaupthing's ideas for stock picks!"

The intranet team also analyzed Web metrics to inform their redesign choices. And their agency, SJÁ, conducted user testing of new design prototypes, as well as an expert review on the redesign prior to launch.



Pictured: The Excel wireframe of the original intranet, launched in November 2005. Two graphic designers were selected to make design proposals for the new intranet based on this wireframe.

10 Best Intranets: Kaupthing Bank



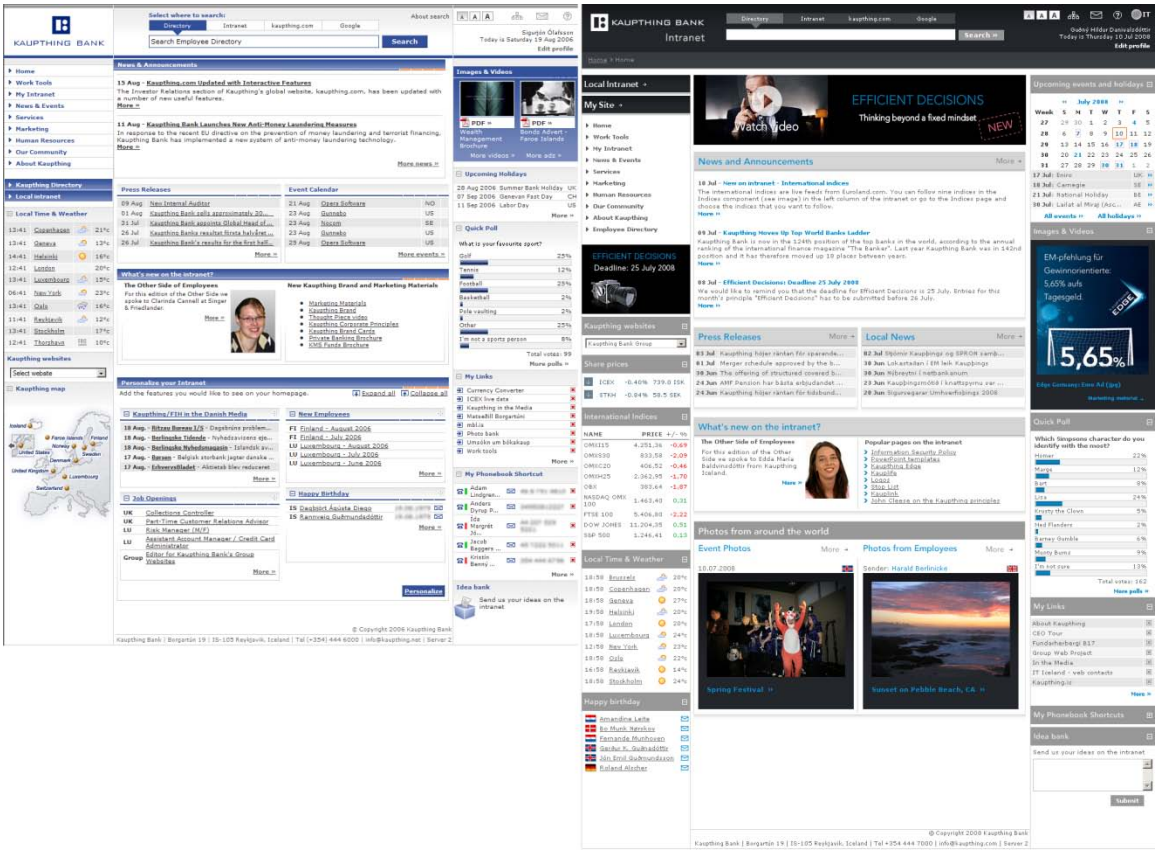
Pictured: The team selected this design proposal to further develop.

10 Best Intranets: Kaupthing Bank



Pictured: The intranet design in its final stages, prior to the 2005 launch. Some features seen here—including the Outlook e-mail, the calendar, and tasks—were not included in the actual launch for security and technical reasons.

10 Best Intranets: Kaupthing Bank



Pictured: A side-by-side view of the global intranet in 2006, prior to the redesign (left), and in 2008 after the redesign (right). Blue was Kaupthing's brand color; now it's black. The frame is the same on the original and the redesigned intranet, but the color usage and set-up is different. New functions and sections were added and older functions were improved.



Time/Date	Impressions	Of this list
2005	128.170	1,68%
2006	1.415.686	18,56%
2007	2.942.854	38,58%
2008	3.140.276	41,17%
Total:	**7.626.986**	**100%**

Pictured: Intranet traffic statistics from 2005 to 2008. This chart shows the number of page impressions in 2005, 2006, 2007, and 2008. There has been a steady rise in the intranet usage since November 2005, when the global intranet was launched. In 2005, there were 128,170 page impressions compared to 3,140,276 in 2008.

URL AND ACCESS

The intranet URL is http://intranet.kaupthing.com

The site is the default start page for all Kaupthing employees worldwide. Users are recognized on the homepage and see their names in the top right-hand corner in the header, where they can update/edit their own profile information. Users can access their local intranet by clicking a prominent *Local intranet* shortcut link in the left column. Users can change their start page during a session, but the global intranet is reset as the start page after restart.

Employees don't generally have remote access to the intranet, but a VPN connection is available upon request.

TECHNOLOGY

The intranet's wireframe was originally built in Microsoft Excel. Based on this wireframe, the graphic designer drafted proposals in Adobe Photoshop CS3. The IT

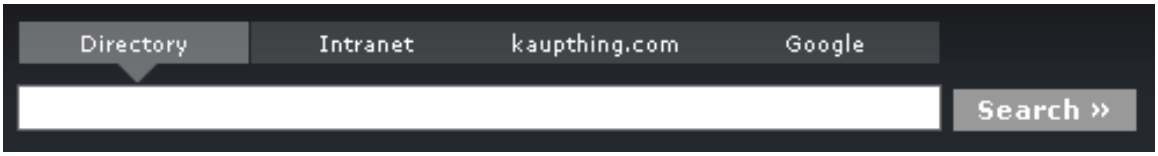
department then developed the project using Visual Studio 2005 and LiSA (www.eskill.is), which uses .NET technology, as the CMS.

"Very few solutions are developed at file level in Visual Studio; our LiSA system is the most commonly used development tool," says Ólafsson. "Certain visual elements of the site, such as animated banners and analogue clocks, are created with Adobe Flash CS3."

The website's hardware is a HP Proliant 64-bit server running MS Windows 2003 64-bit operating system.

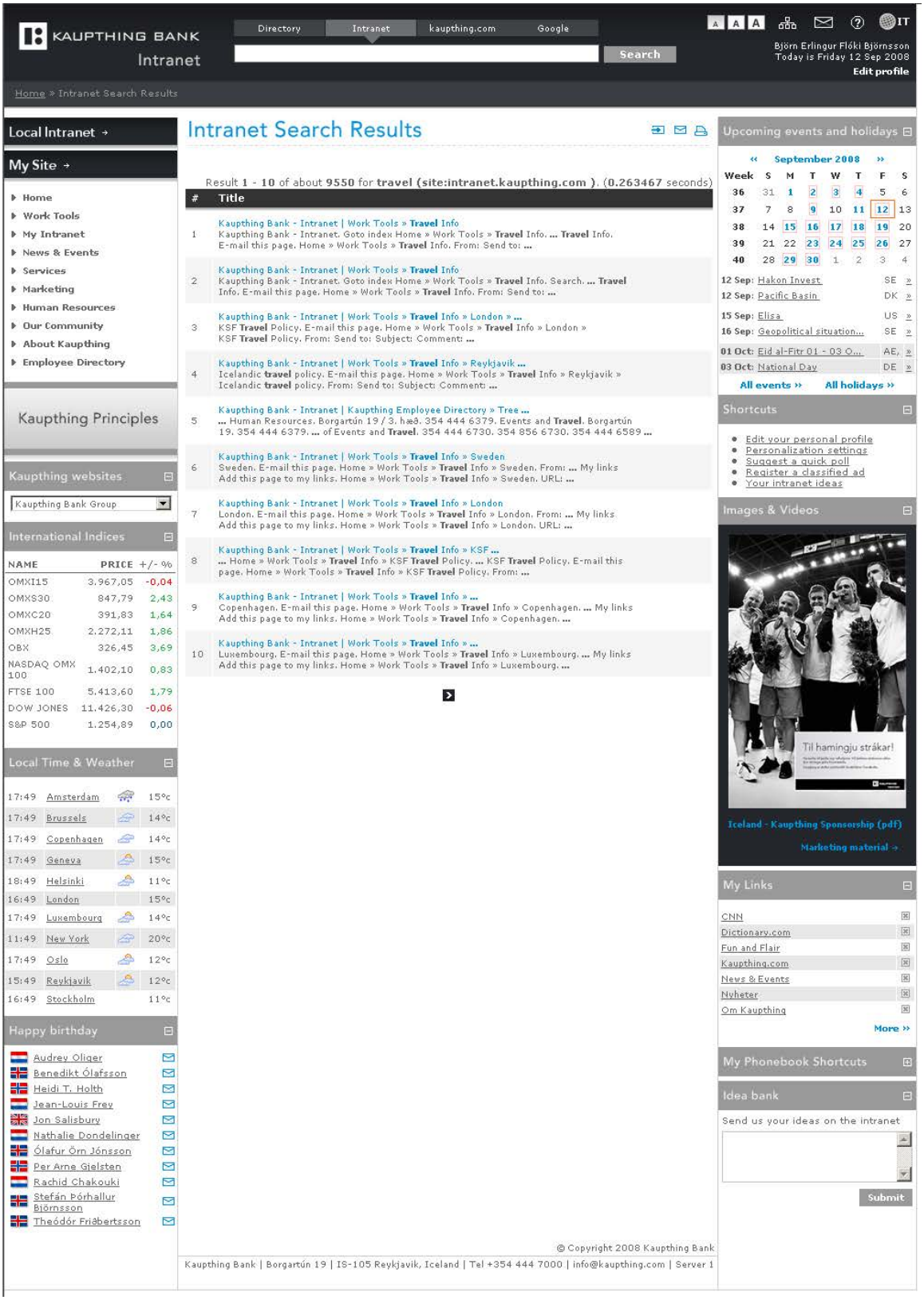
SEARCH

The intranet has a Google search box, but the site uses only its most basic features. Google has been the site search since the launch of the intranet in November 2005. The team chose it because it wanted a "proven" technology. "We have good experience with that tool," says Ólafsson. "Although we know that we have not fully used all its potential yet, the basic Google search has proved sufficient for our current needs. We have not received requests from our users for more search features."



Pictured: The intranet search box, close-up. This search bar appears on top of all pages. Users can search in the intranet directory, intranet pages (via Google's site search engine), kaupthing.com, or Google.com.

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Pictured: An example search results page for the word “travel".

CONTENT MANAGEMENT

CMS Technology

The Kaupthing Bank intranet content is built and maintained through the LiSA CMS system. The LiSA.NET CMS was developed by a Kaupthing technology partner, the Icelandic service provider Eskill Ltd., and is sold to various companies. Although Eskill doesn't custom build the CMS for each company specifically, clients are encouraged to send feedback and requests for improvements to be included in future versions of the software. "These requests have been met enthusiastically by Eskill Ltd.," says Björn Erlingur Flóki Björnsson, Web editor, adding that Eskill has "used many of our ideas for their LiSA development."

LiSA is based on Microsoft server technology. The programming language is C# utilizing the .NET 2.0 framework on IIS for the application. The database is run on SQL Server 2000 and SQL Server 2005, on both 32-bit and 64-bit platforms.

"The software is ideally suited to reuse and transmit information managed by other systems," says Hrafnhildur Sif Sverrisdóttir, from Kaupthing's technology agency, Eskill Ltd. "LiSA offers a significant number of special features and advantages, and is also undergoing continuous development," she says.

Customizing the CMS Functionality

The intranet uses the LiSA CMS framework and takes advantage of LiSA's numerous built-in features. Kaupthing's programmers also take advantage of LiSA's API to write their own user controls, which can be applied to all Web pages and page sections in the CMS.

An example of the extended functionality is the highly flexible customization for each intranet user. Users can easily customize their view using drag-and-drop control and choose their display options from multiple objects. Information like news and calendar events is region-specific, which ensures that employees receive the information they need.

Features such as the *File Archive*, *My Phonebook*, *My Links*, *Flea Market*, and *Job Openings* use built-in LiSA solutions, where data resides either in LiSA or in external systems. "The flexibility of LiSA CMS ensures that such external connections can be easily implemented, for example, by using the LiSA WebService Control," says Sverrisdóttir. "Another LiSA functionality much used by the intranet is the List Object that allows the admin user to create customized databases to hold and receive data."

Data is then displayed, filtered, and sorted using XSLT/XML. Example implementations include the *Flea Market*, *Menus & Recipes*, and various registration forms.

Content Ownership

The global intranet content is owned and managed by the Web team members in Corporate Communications. Content sent in by other staff members is edited and proofread by them prior to publication. "We find that centralizing content management within Corporate Communications ensures consistency in its content, look, and feel," says Danivalsdóttir.

The global intranet editor is responsible for all intranet sections, with the exception of a few dedicated sections managed by editors from particular divisions. CMS access is restricted to an editor's own section content. These sections are accessible only to employees in their respective divisions.

The team has created an environment encouraging employees to submit content to the site for publication using several of the site's features, such as a static *Idea bank* form in the right column. "We try to create an environment in which employees throughout the company feel comfortable sending in material, such as human interest stories and interesting accomplishments," says Danivalsdóttir.

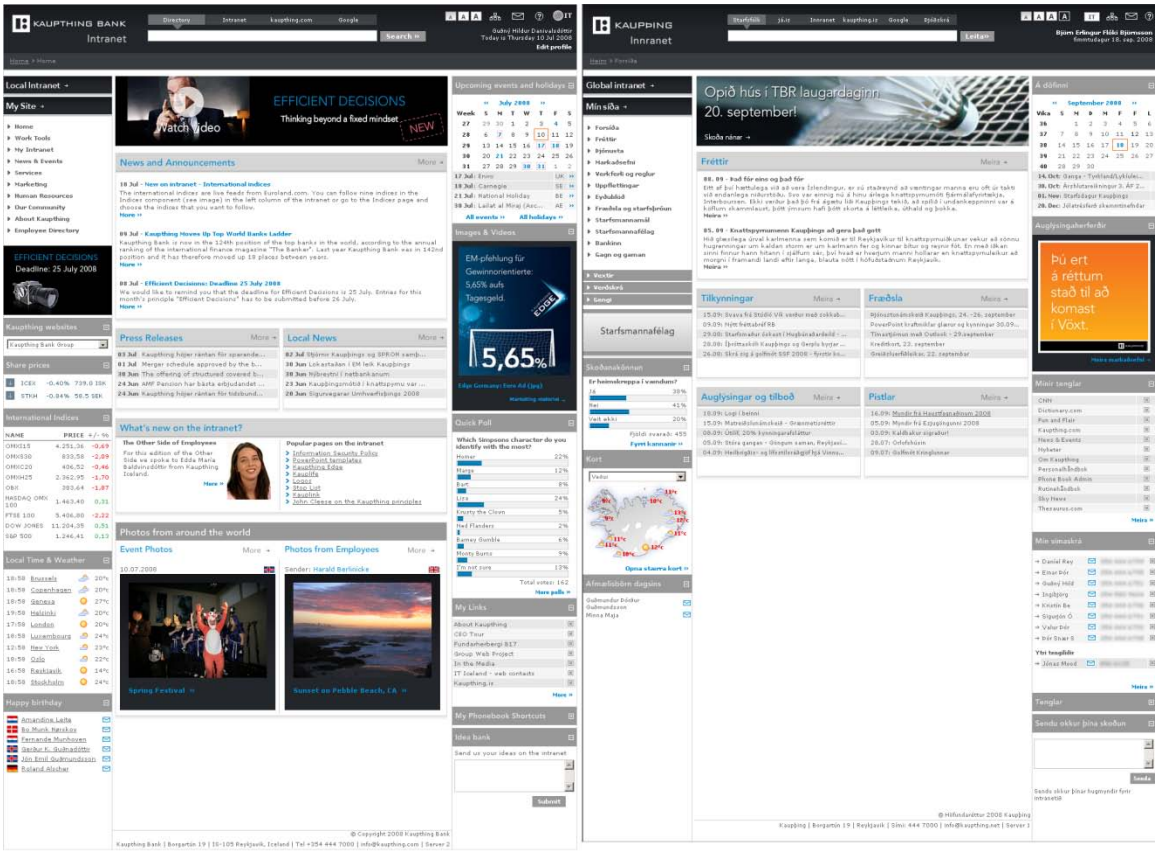
The global intranet is entirely managed by the Web team in Corporate Communications, so template enforcement is not required. Authors on the local intranet sites don't have permission to create or edit templates/stylesheets, which Danivalsdóttir says ensures design consistency and conformity to the brand guidelines on all of the bank's intranets. "Enforcing the design standard has therefore not been met by many challenges," she says. "It has also proved beneficial that the head editors of the local intranets for the most part come from the Marketing division of each office, as they are conscious of the design standards defined by the brand guidelines."

This awareness has played an important role in keeping the look and feel of the intranet sites consistent. As a result, deviations from design standards on the local intranets are rare.

Global Templates

The team established a uniform template for all pages, with the option of excluding the right-column components, depending on the content area required for the page. The templates were designed in accordance with Kaupthing Bank's brand guidelines, in cooperation with Kaupthing Bank's brand manager.

"We have not developed design guidelines specifically for the templates, as all the templates are managed and supervised by the Web team in Corporate Communications with the brand guidelines in mind," says Danivalsdóttir, adding that the design guideline for managing content pages includes color usage, headings, image usage, and so on. Local intranets use the same templates as the global intranet, with minor changes to suit each office's needs (such as expanding the news area) while leaving the overall layout and look and feel unchanged.



Pictured: A comparison between the global intranet (left) template and the template as it is used on the Icelandic intranet (right). Local intranets use the same templates as the global intranet, with minor changes. The homepage designs can vary from country to country. The set-up, emphasis, and functions are tailored to some extent to suit the needs of each office, while the overall layout, color usage, and look and feel remains the same.

Local Intranets

Local intranet sub-sites exist for the bank's offices in Iceland, Sweden, Norway, and Finland. These intranet sub-sites are managed through the same CMS by local staff, with support from the global Web team as needed.

Each local intranet has a lead editor from the local Marketing division that manages all of his or her sub-site's content. HR staff members are also given access to update sections relevant to their own division.

"The authors of the local intranets are, for the most part, autonomous in their content management," says Ólafsson, adding that they have "full access to content-driven features in the CMS, including full page permissions, access to the news manager, image uploading, page security, and page components."

Sub-site authors do not have access to templates, stylesheets, or any other elements that can change the overall site's structure or appearance.

MOBILE

The site is not optimized for remote access via mobile devices. However, the intranet's employee directory, which contains contact information for every employee

in the company, is accessible in BlackBerry handheld devices and all mobile phones/devices that support Microsoft Activesync.

"Currently, there is no requirement for mobile access to the intranet," says Björnsson. "However, we are in the process of integrating into our intranet directory a free SMS sending option to all employees' mobile phones, as well as to any external mobile phones."

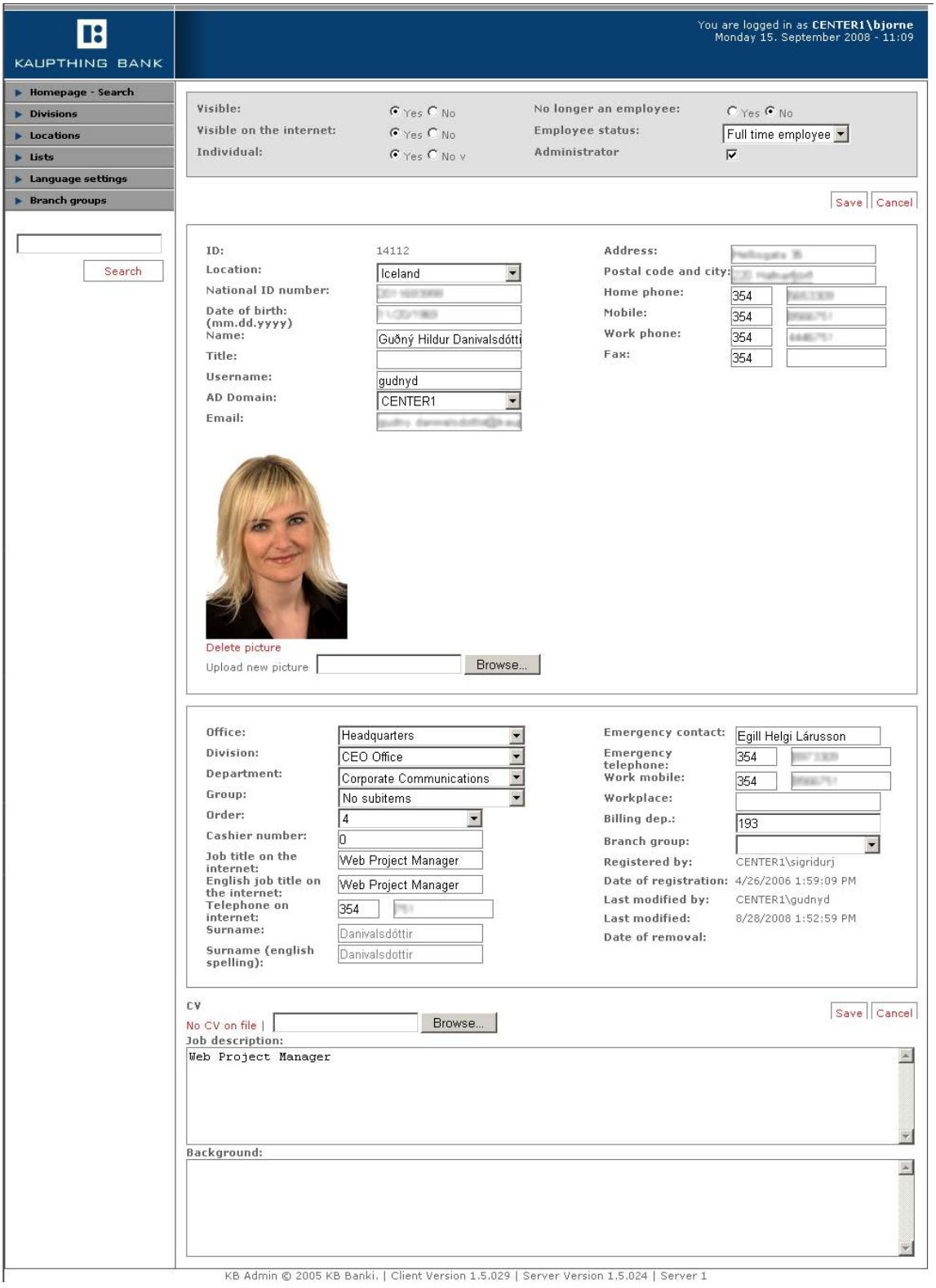
The directory will feature an SMS icon next to the person's name that, when pressed, displays a simple SMS sending form.

FEATURES

Though many of the site's features have been mentioned throughout this report, following are some of the most interesting and popular site components.

Intranet directory. This is the intranet's most popular feature. It lets users run an open search, search for words with special characters, or filter by country, division, department, or job title. Employees are registered in the intranet directory through the Directory admin system, a separate interface built for the intranet directory. Cisco WebDialer is a new intranet function that lets Kaupthing employees make calls from their desk phone by clicking on the hyperlinked telephone numbers (office and mobile) in the intranet directory.

10 Best Intranets: Kaupthing Bank

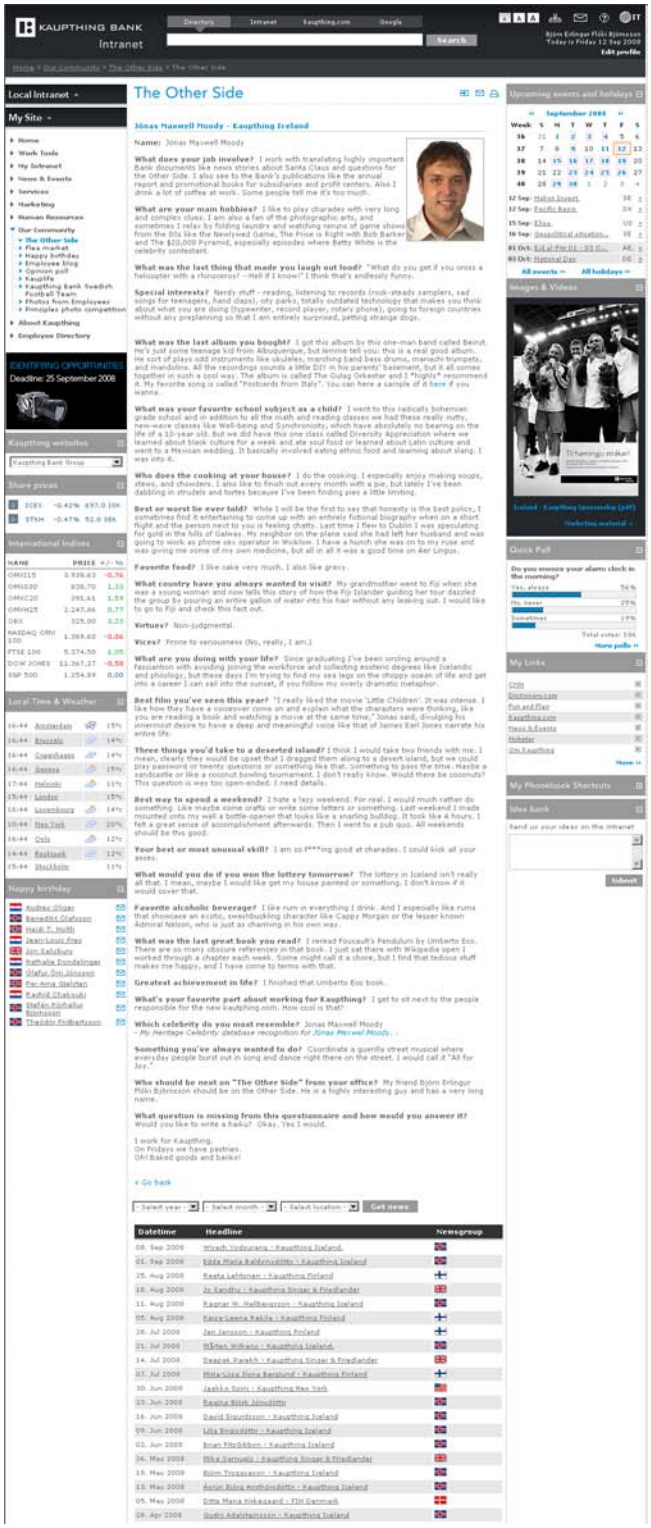


Pictured: The directory administration system. Employees are registered and edited in the intranet directory through this system, which is a separate interface built for the intranet directory.

***My Site* and personalization.** *My Site* offers all personalization on one page. Employees can choose site components they want by adjusting their personalization settings and the setup (drag and drop). Among the components that users can choose from are *My Phonebook*, *My Links*, *Flea Market*, *Job Openings*, *New employees*, currency exchange rates, currency converter, and *Menus & Recipes*.

***The Other Side* (of employees) and an opinion poll.** *The Other Side* is a weekly light-hearted interview with the employees of Kaupthing Bank that has appeared weekly since November 2005. There is also a weekly opinion poll to increase user's participation on the intranet.

10 Best Intranets: Kaupthing Bank



Pictured: *The Other Side* page. *The Other Side* offers a light-hearted, weekly interview with the employees of Kaupthing Bank and has been posted weekly since November 2005.

10 Best Intranets: Kaupthing Bank

***Photos from Employees* and employee blogs.** Last Christmas, all employees received a camera as a gift from Kaupthing Bank. *Photos from Employees* is a section that lets employees share their favorite photos from their personal collections. A thumbnail of the most recent photo is displayed on the homepage in the *Photos from Around the World* area, and all posted images can be viewed on the *Photos from Employees* page.

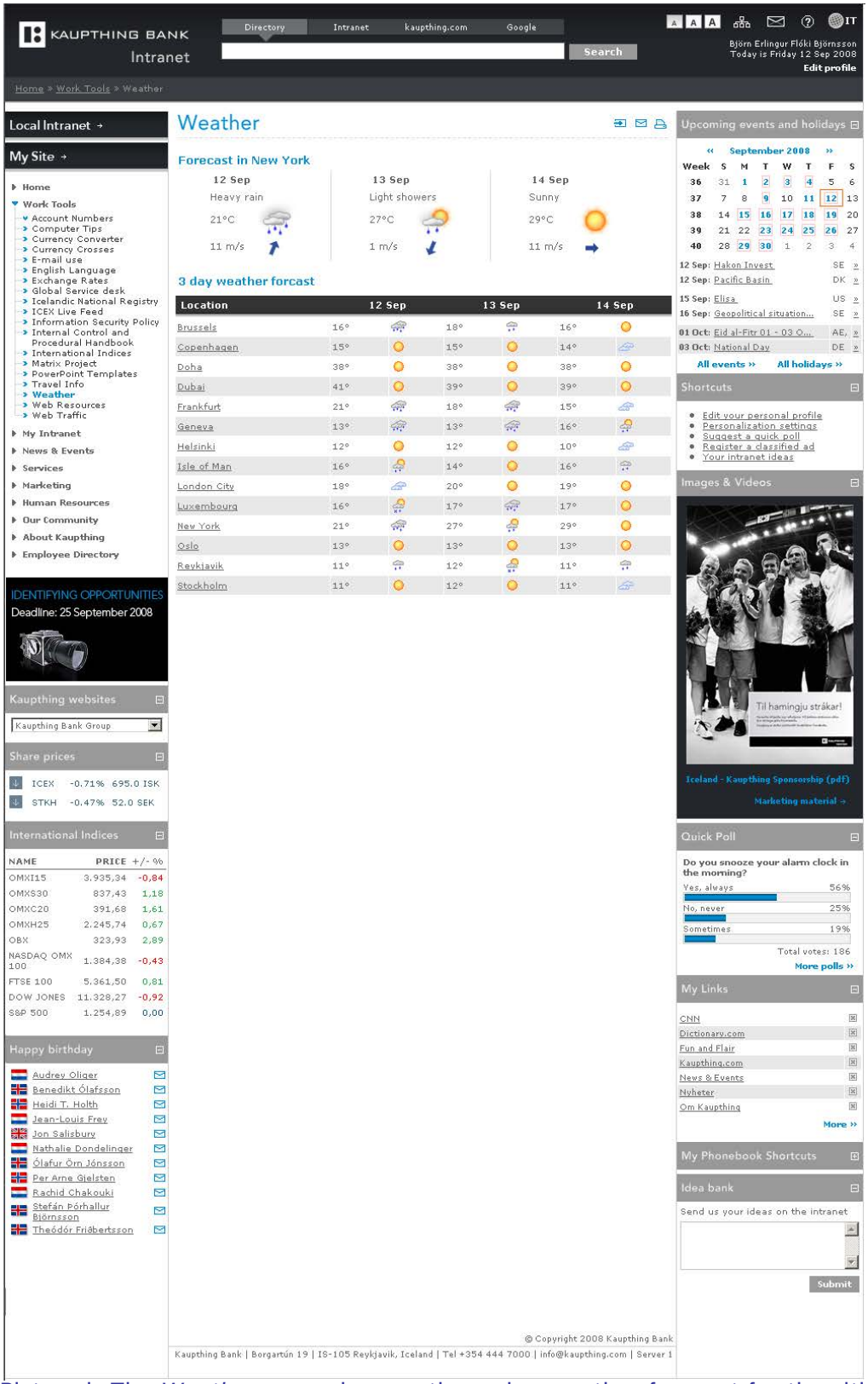


Pictured: Comments on a *Photos from Employees* submission. Users can get to these comments by clicking on the photo's title or the comment icon in the photo thumbnail on the main *Photos from Employees* page. Once clicked, the user sees a pop-up window with a larger image, name of sender, title, flag, a comment archive, and the post comment form.

Event and holiday calendar. In the homepage's right column, users see lists of all Kaupthing events and bank holidays along with a calendar.

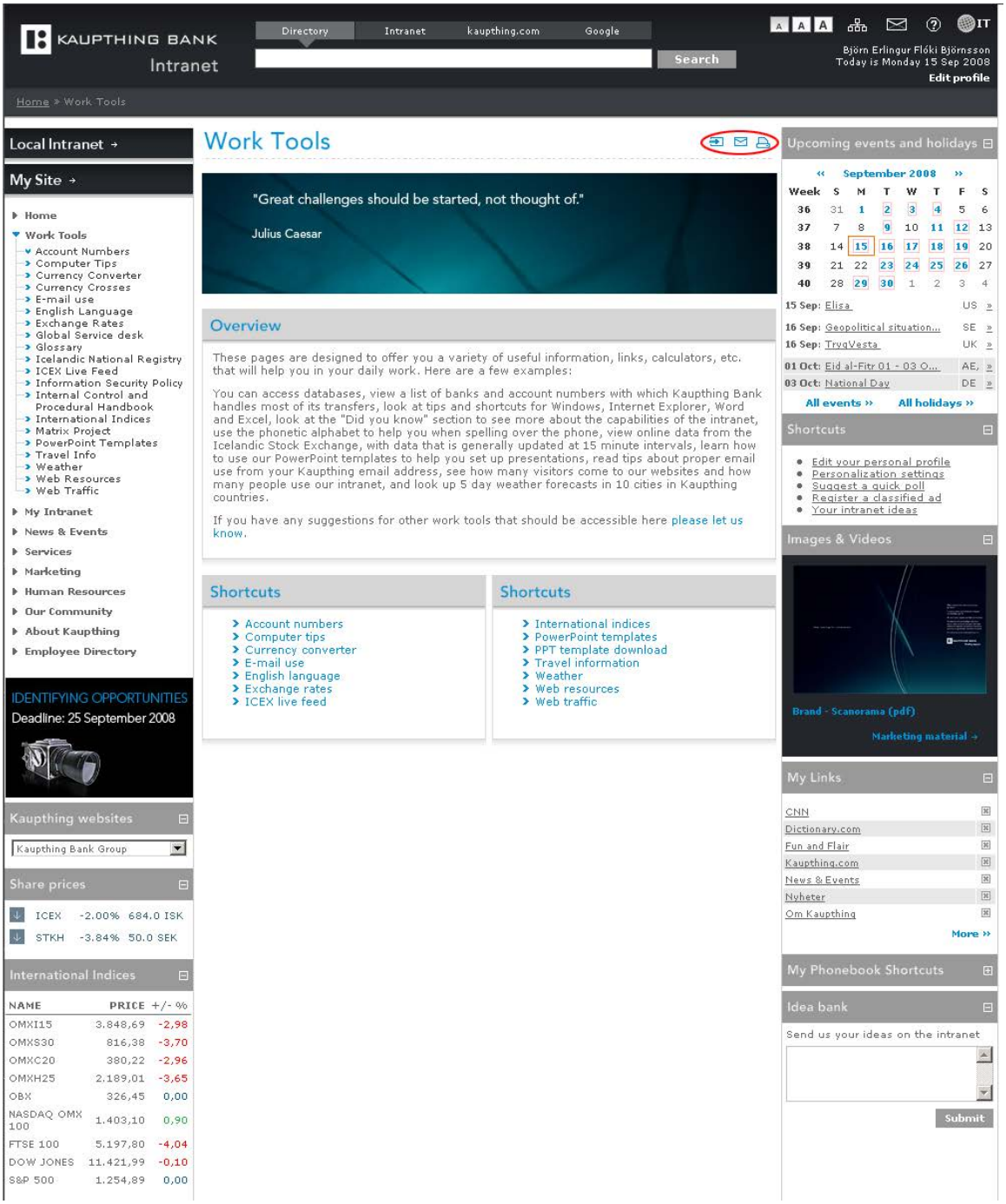
Local time and weather. This page shows a three-day weather forecast and the local time in Kaupthing's cities of operation. The homepage's *Local Time and Weather* component appears in the left column and shows local time, today's weather forecast, and a link to a three-day forecast for all cities.

10 Best Intranets: Kaupthing Bank



Pictured: The *Weather* page shows a three-day weather forecast for the cities in which Kaupthing operates.

Sub-page user options. All sub-pages let users print, e-mail, and rate the page or add it to their links.

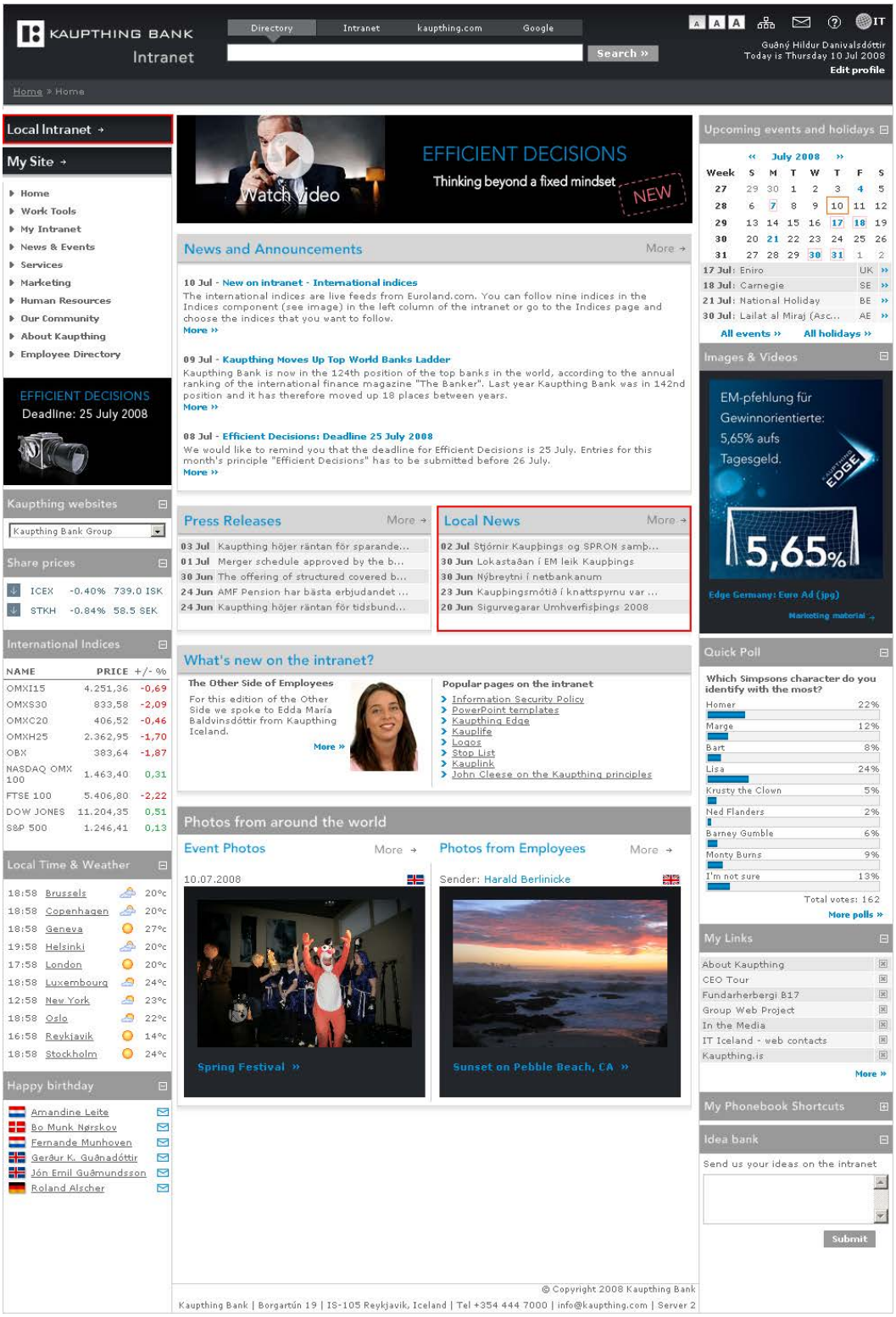


Pictured: The sub-page options are circled in red near the top right. Each sub-page offers users the option to print, e-mail and rate the page or add it to their links.

10 Best Intranets: Kaupthing Bank

Local intranet link and news box. Employees can easily access their local intranet from the global intranet using the *Local intranet* shortcut. They can also follow their local news on the global intranet's homepage in the *Local News* area. The intranet recognizes users and displays personalized information such as local news or, if that is unavailable, interactivity options that list the main interactive shortcut links available on the intranet.

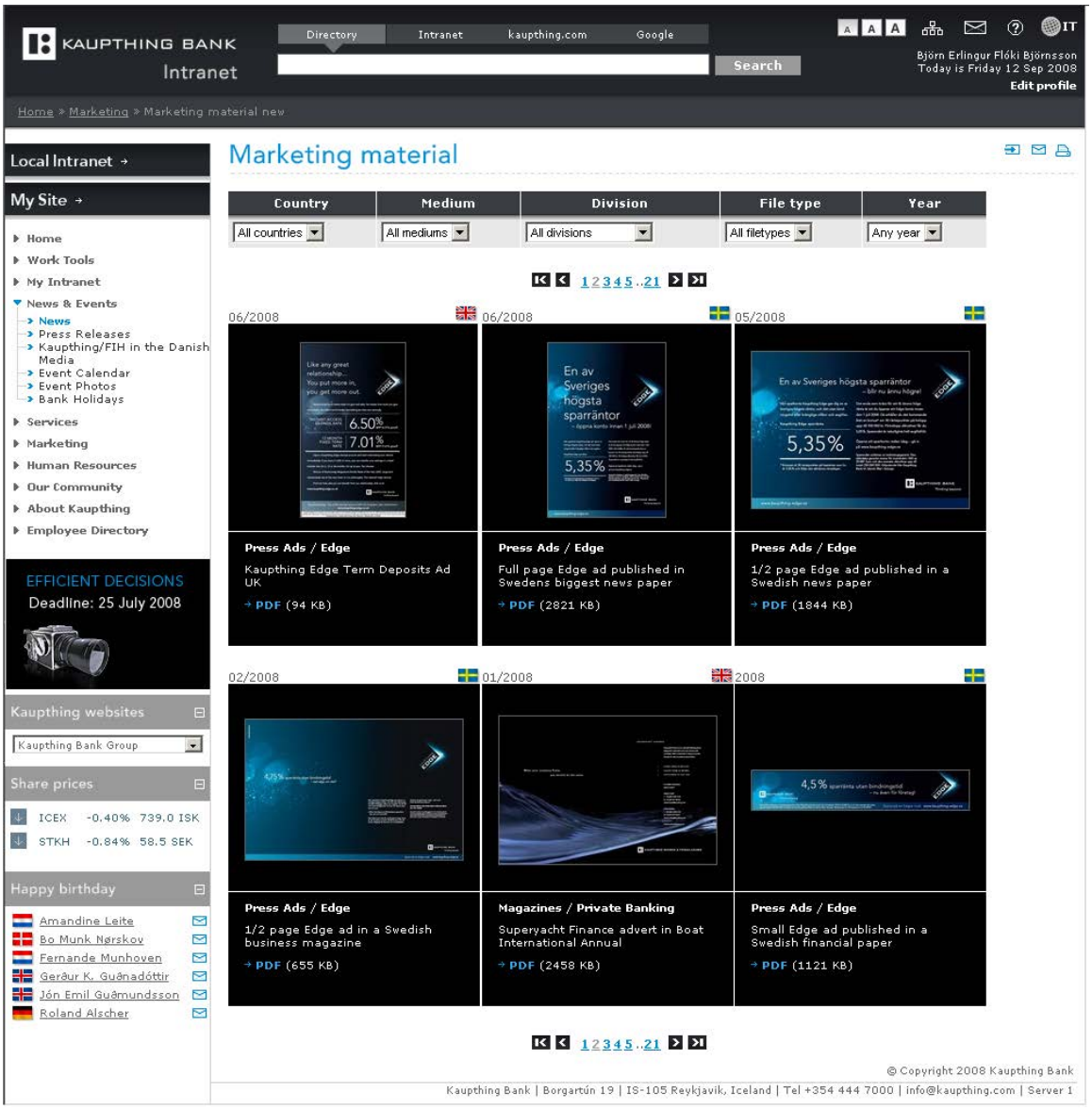
10 Best Intranets: Kaupthing Bank



Pictured: Employees can easily access their local intranet from the global intranet using the *Local intranet* shortcut. They can also access *Local News* on the global homepage. The intranet recognizes users and displays personalized information accordingly.

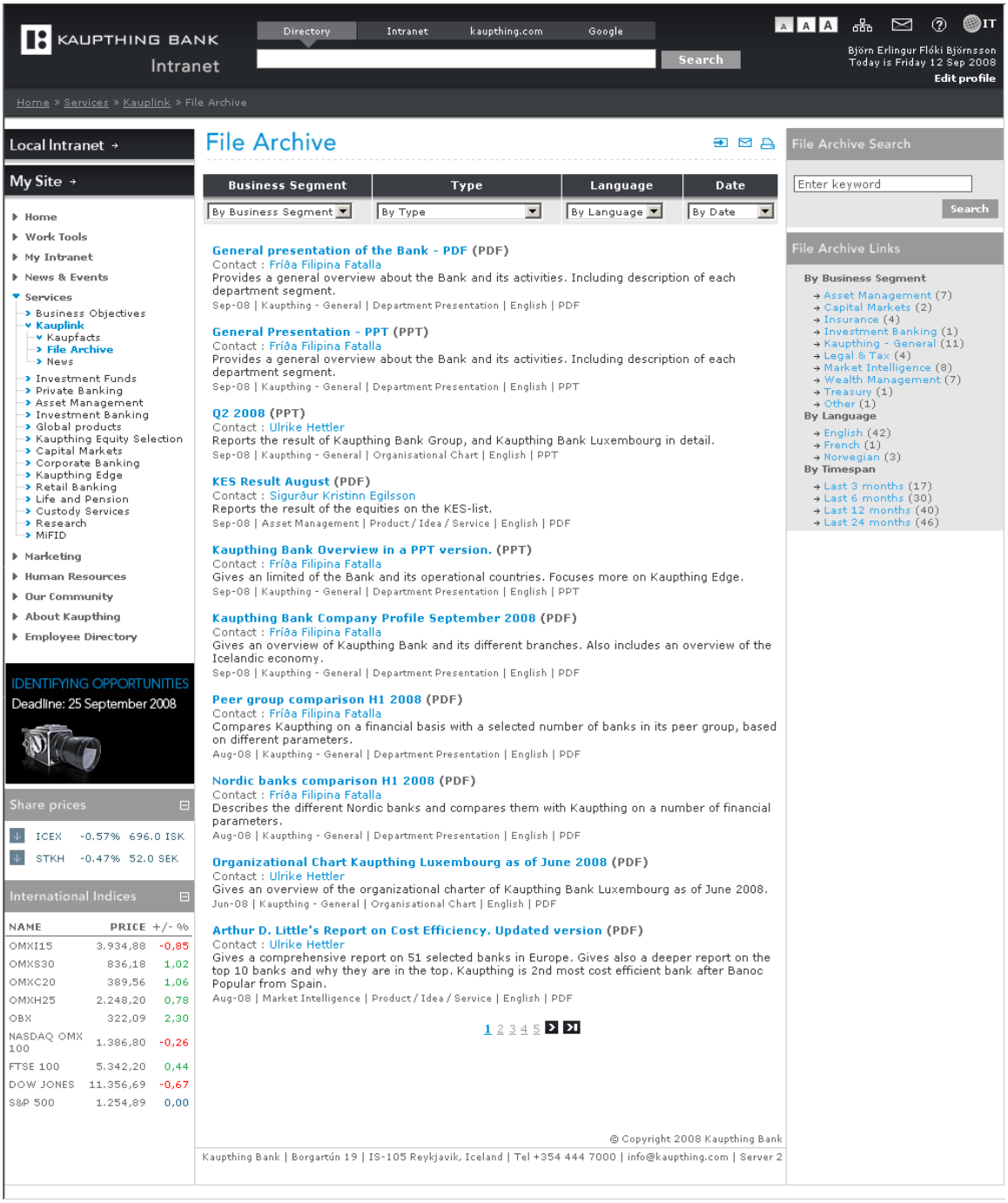
10 Best Intranets: Kaupthing Bank

Marketing material archive. All Kaupthing marketing material is collected in a database in the Brand LiSA/website. The marketing material is displayed in a searchable and filterable database on the Brand website, which offers restricted access for marketing people and advertising agencies. Users can mark each marketing material item to display on the intranet's marketing material archive page or on the Brand website only. So, the marketing material is simply inserted into a single LiSA database, but can be displayed on the Brand site or on the intranet.



Pictured: The *Marketing material* archive page. All the Kaupthing marketing material is collected in a database in the Brand LiSA/website. The marketing material is displayed in a searchable and filterable database on the Brand website, which is a restricted access site for the marketing people and advertising agencies.

10 Best Intranets: Kaupthing Bank



Pictured: A file archive page shows the 1st, 2nd, and 3rd level navigation and a sub-page. This page's filtering options are in the top menu, while the right column offers a *File archive search* and a list of *File archive links.*

LESSONS LEARNED

Sometimes, updating an existing site can create more work than starting from scratch. The team at Kaupthing learned this the hard way.

"If we would have known beforehand of all the constraints we would encounter and how much work and time the redesign would was going to take, then we would have seriously considered creating a new intranet instead of doing the redesign," says Danivalsdóttir. Given that, team members offer some lessons learned:

- **Evaluate your options.** "The cost of creating a new website or redesigning the old website is similar," says Danivalsdóttir. "The benefit of changing the stylesheets is that you don't have to physically move content and links, only edit the old pages, which can save some time."
- **Manage workflow.** "Due to the tight time plan, there were two programmers working on the stylesheets for the Icelandic and the global intranet at the same time," says Hrefna Arnardóttir, an Eskill programmer. "In hindsight, it would have been better to finish the stylesheets for the global intranet before we started on the Icelandic intranet, since there were some overlaps in the stylesheet work."
- **Planning and preparation can pay off.** "The launch of the five revamped intranets during the weekend of 19-20 January went better than expected, thanks to good planning, preparation, and experienced people," says Danivalsdóttir. "There were no big surprises in the launch, only fixes of details, functions, and minor errors on the intranets."
- **Get buy-in from the top.** "It proved to be very important to have backing from the CEO in the initial intranet project," says Danivalsdóttir. "He gave the project full support, both personally and by providing resources. He thought it was very important for the integration of different cultures in many different countries in the group. From the beginning, the CEO and the managing director of Corporate Communications have fully supported the intranet development."

RESULTS / ROI

Building an Umbrella

In February 2008, the global intranet became the default start-up page for all Kaupthing offices. Employees can easily access their local intranet from the global intranet using the *Local intranet* shortcut, and they can also follow local news on the global homepage through the *Local News* component. "The global intranet is the umbrella," says Ólafsson, "and the local intranets act as a forum for local information in regional locations. This gives us the latitude to sharpen the global intranet's focus, but not stifle the flow of regional information at the local level."

Bridging Geographic Divides

Kaupthing Bank has expanded very fast in the past five to six years, with several acquisitions in different countries. "Having one common intranet for the whole group was without a doubt one of the most important factors in creating a unified Kaupthing Bank culture and giving everyone access to the same information," says Ólafsson. "The effort we put in making the employee directory as efficient and user friendly as possible has paid off."

Measureable Improvements

Following the redesign, there's been a steady rise in intranet usage and a palpable increase in users' feedback and participation on the intranet. This includes suggestions for polls, ideas for improvements, photos from employees, photo competition entries, blogs from employees, and more user feedback in general.

"The CEO and executive management have, from the beginning, emphasized the importance of the intranet, so providing the management with data on the intranet's popularity has not been essential to their ongoing support," says Danivalsdóttir. "However, Web metrics data following the redesign showed that the redesign and its added features have indeed increased usage. Page views in the month preceding the launch date were 176,029, whereas page views in the month following the launch were 378,403."

Here are a few examples of things bank employees can do on the new intranet that they couldn't do before:

- Users can add external contacts to their phonebook and use the pager in the search results to slide through results more quickly.
- Cisco WebDialer, a new intranet function, lets Kaupthing employees make calls from their desk phone by clicking on the hyperlinked telephone numbers (office and mobile) in the intranet directory.
- All personalization was moved to one page: *My Site*. Employees can choose which components they want to display and the page setup. The page includes a component with all the interactive links available on the intranet.
- Employees can follow news from their local intranet through the global homepage's *Local news* and easily access their local intranet through the *Local intranet* link.
- Improve structure on overview pages—including introductory text and shortcut boxes—makes it easier for employees to find material in each navigation section.
- Users can share their favorite photos, participate in the Kaupthing's principles photo competition, blog about a topic that interests them, view John Cleese's videos on the business principles, and get to know their colleagues around the globe.

AMP Limited

Using the intranet:
AMP is a leading wealth management company operating in Australia and New Zealand, with selective investment management activities in Asia (through AMP Capital Investors) and a growing banking business in Australia.

Headquarters: Circular Quay, Sydney, NSW, Australia

Number of employees the intranet supports:
More than 3,500 employees

Locations where people use the intranet:
Primarily Australia and New Zealand

Design team:
The core team responsible for the design and build was a collaboration of in-house teams from IT and Public Affairs, along with some limited consultancy expertise.

Members:
Intranet Governance Forum: Vernon Meyer, Intranet and Innovation Manager; Rebecca Makila, Internal Communications Manager; Annalie Killian, IT Director; Aneta Beocanin, IT Manager; Joanne Hawkins, Communications Director; Tim Parks, Senior Manager, Internal Communications; Cara Reil, HR Director; and Justin Maughan, Digital Channel and Strategy Manager

Intranet team members: Vernon Meyer, Intranet and Innovation Manager; Rebecca Makila, Internal Communications Manager (Public Affairs); Ivan Prpic, Online Producer; and Jason Lamble, Analyst

IT team members: Andrew Vaughan, John Norman, Chris Fleming, Rob Hudson, Rebecca Lee, Prakash Chaudary, Maniraj Mahendrarajah, Richard Martin, Nikos Gavriniotis, John Perumalla, Yuval Ararat, and Anuradha Satish

Project services: Glenn Tolan, Project Manager, and Vicky Hughes, Change Manager

Intranet site managers (decentralized publishing model): Kerry Maton, Ben Mabon, Belinda Davidson, Robert Wilkins, Naomi Hishon, Bethany Poore, Dorothy Cheng, Anastasia Vaughan, Jane Ewings, Gordana Tesic, Samantha Petti, Katy Sheppard, James Williams, Kimberly Wills, Mike Izzard, Andrew Gorvin-White, Brenda Bray, Michelle James, Linda Branton, Viki Jones, Lauren Overton, and Kiran Rajpal

Hothouse Information Architects: Piero Colli and Barbara Glover

Morgan Creative: Grant Newton and Mario Rogic

Projekta digital production agency: Rhadi Bryant and Nathan Richman

Gruden Interactive Design & Development Agency: Mark Stanton

Andrew Boddy Design: Andrew Boddy

SUMMARY

Treating Employees as Customers

Employees as customers — that's the approach AMP took when starting its intranet redesign. The designers knew that employees were unhappy with the site, which contained siloed, brochure-like pages based on who owned the content. Employees couldn't find the information they needed and, as a result, were turning back to email to share information.

To remedy this, team members took on a major site redesign with a three-pronged focus: search (which they knew was painful), IA (which was based on the organizational structure, making it difficult for employees to find information and get their work done), and people (with an emphasis on profiles, personalization, customization, and content interaction.)

At redesign time, the stars seemed to align. Although employee complaints triggered the need, a review by the Intranet Benchmarking Forum, inspiration about collaboration from an Innovation & Thought Leadership Festival, and a corporate cultural-change program all informed, inspired, and influenced the end result. This helped designers both get stakeholders involved in the redesign, plan for future

growth, and commit to the investment required to make the intranet a core business tool for the long term.

Team members knew that making employees their customers meant listening to them and involving them at every step along the way. They worked closely with employees throughout the organization, doing thorough task analysis and card-sorting exercises to both identify the content users needed and label and name that content effectively. The user research also let the team rely on user data to build the case for intranet changes, giving them data to back up their design decisions.

The team understood they needed to treat the intranet as a product that would be advertised to employees and stakeholders alike. And they knew they had to "win back" employees to the intranet. The site's audience had lost interest based on poor past experiences. The team needed the new intranet site to reflect the company's goals with retail customers: to be easy to do business with, contemporary, brand-aligned, and customer-driven.

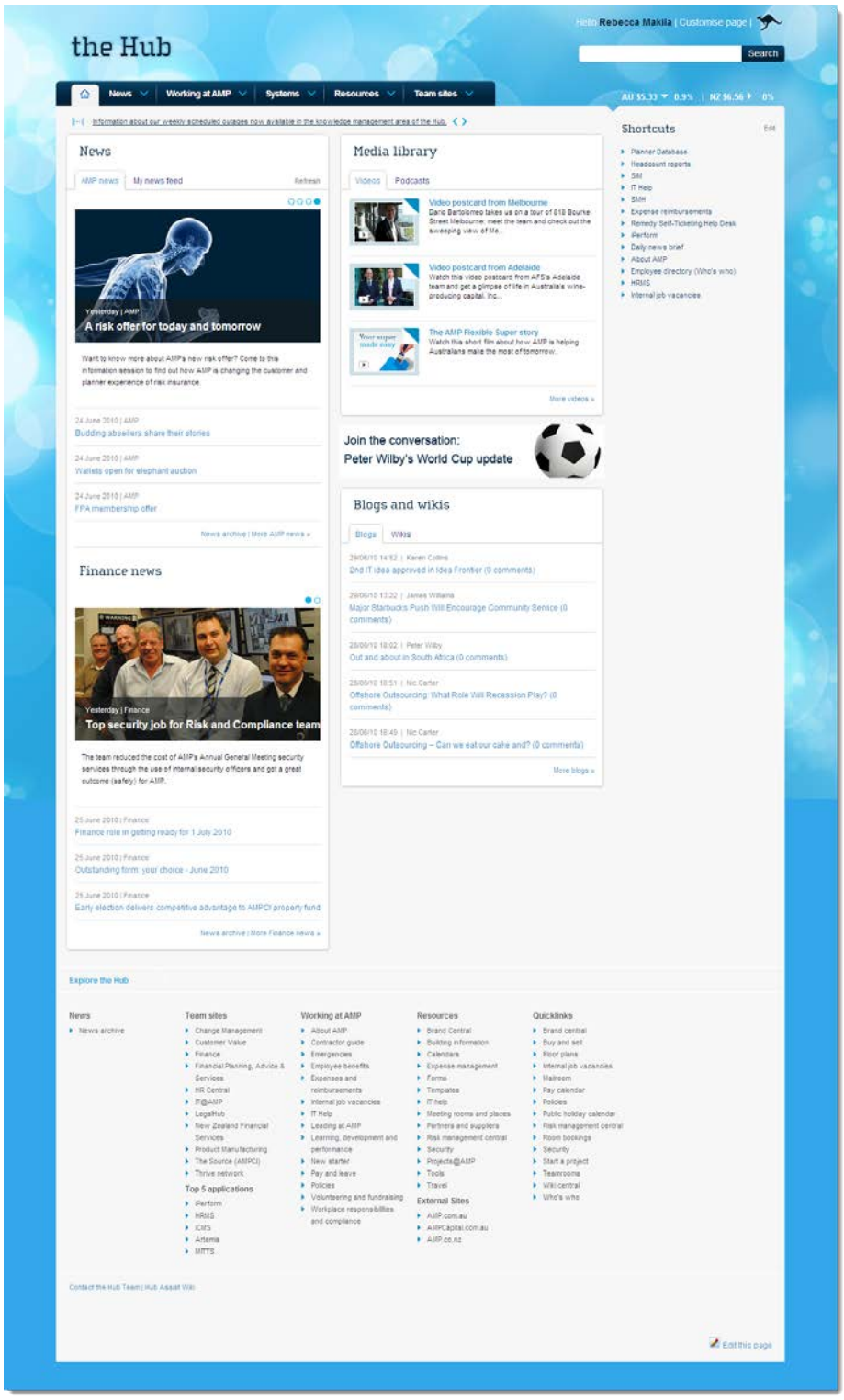
The homepage, as well as the rest of the site, presents location-specific information and links. Mega-menus in the site navigation, as well as footer links, are location-specific, preventing an employee in Australia, for instance, from using a form intended for New Zealand employees. The site provides a single homepage, which is tailored to the user's profile in terms of geographic location and team.

News is the main homepage feature, with company-wide news, employee-selected news feeds, and team news. The site also features, at the top of the page, a one-line area for special announcements relevant to all employees, regardless of location or team. These headlines rotate on a 10-second timer.

Company-wide news includes a rotating area displaying headlines and images for the four most recent news items. News contributors — a group of about 12 people — are encouraged to create engaging headlines and use compelling images to keep the content quality high. Older news items move down to a list of headlines. The team made a conscious decision not to include thumbnail images with older news stories and to focus on the headline itself. Most news is company-wide, as the team is trying to avoid the information silos that made the old intranet difficult to use.

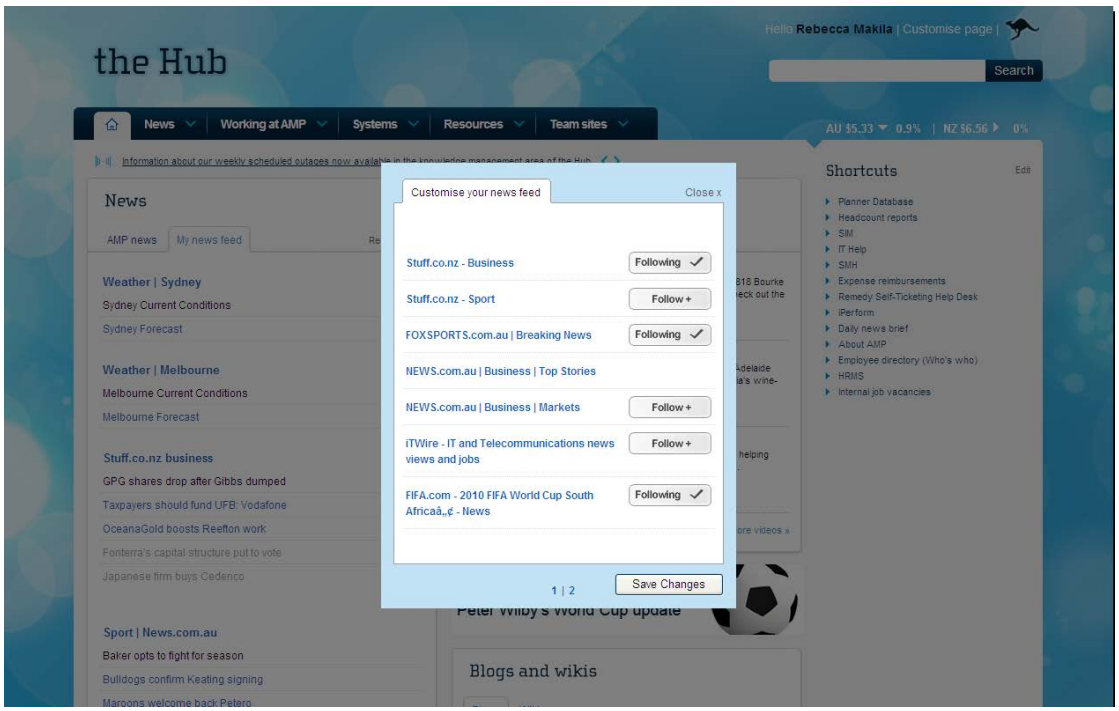
When users click to view more news in any section, additional headlines appear within the homepage.

The homepage includes the *Media Center*, which highlights recent videos and audio podcasts. The new site encourages the use of various media to communicate ideas, and using video was one of the many ways the intranet team introduced the new site to employees. Employees are encouraged to make videos for the site and to keep them under two minutes in length. Videos play in an embedded player, so users can view them directly within the intranet site.



Pictured: The Hub's homepage features company-wide news, team news, and access to personalized news feeds, as well as recent content from the media library, blogs, and wikis.

Users can select their own news feeds from a predetermined list of trusted sites that provide diverse information, including general news, weather, sports, special events, IT news, and market and financial news. To add a feed, a user simply clicks *Follow*.



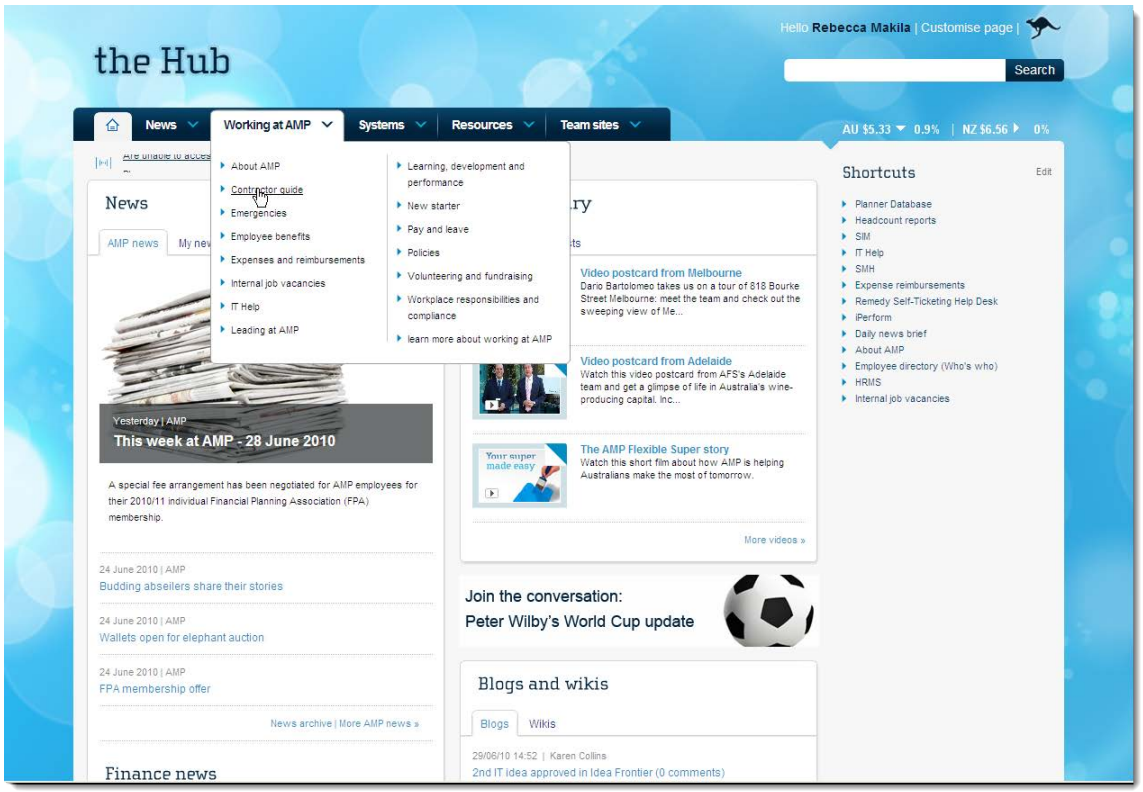
Pictured: Users can add news from a number of trusted sites by clicking the *Follow* button next to the source.

Defining Site Structure Through User Engagement

Card sorting, wireframes, and prototypes helped the team develop the site structure. They built a working site prototype, which ran alongside the previous site for five months, and used it to test and refine the new design.

The change from organization- to task-based architecture was a huge success for the site. The mega-menus reveal the site structure, which clearly organizes information based on extensive user feedback. A *Learn More About...* option at the end of each menu links users to a page listing all available resources, with context to describe usage or tell users how to get more information.

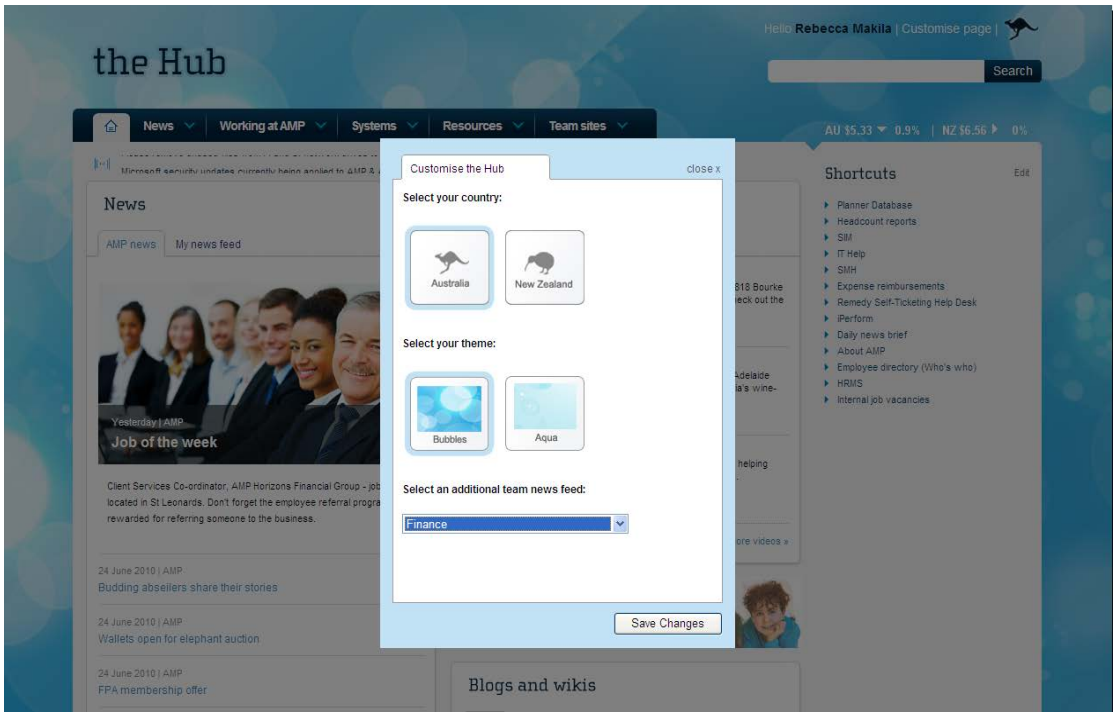
Shortcuts let users edit or add links to systems. The top five systems are listed as the default for all users, but individuals can edit the list. Shortcuts can also be added to any intranet content, external site, or any system. Systems are available via an alphabetical list, or users can bookmark pages via an *Add to Shortcuts* link at the top of each page. Shortcuts can be reorganized dynamically in the user's list via a simple drag-and-drop mechanism, letting users put links in the order they prefer. Shortcuts appear on the right side of every page.



Pictured: A mega-menu, based on extensive user research, exposes the new site structure, which reflects user needs rather than organizational structure. Users can add shortcuts to content, creating a personalized set of navigational links available on the right side of every page.

Team members provided some customization elements, planning to launch a few, watch their uptake, and then decide whether to implement more. Knowing that customization features sometimes fail because users don't want to bother with them (or don't know how they work), the designers integrated customization into the site experience and made it as simple as possible for people to use the features. At launch, users selected three simple identifiers to target content: country, background theme, and a team news feed. These items can be changed at any time.

When any change is made, the site uses modal windows to keep users on the page while presenting options to them. As a result, users don't have to navigate away from content to change a preference.



Pictured: When users first visited the new site, they were asked to select three options: location, theme, and an additional team news feed. These can be changed at any time by clicking *Customise page* in the upper right.

Encouraging Two-Way Communication

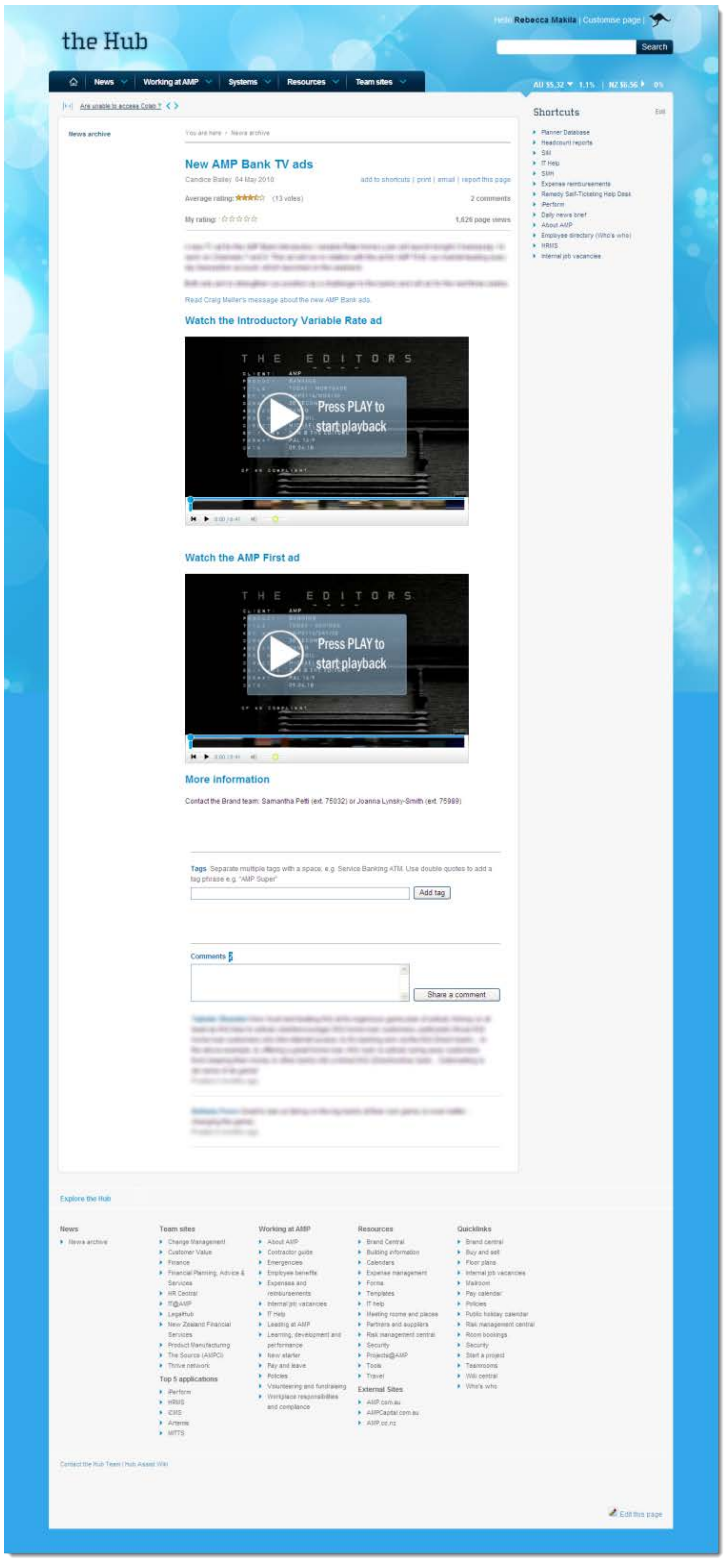
The team wanted the intranet to become a way for the company to engage in two-way communication. As such, they introduced commenting, rating, and tagging.

Content creators can decide if they want users to rate content via an option selected at the time of publishing. When ratings appear, the average rating for the page is shown, together with the number of votes that resulted in that rating. A space for *My Rating* appears below; users simply click on a number of stars to submit the rating for the page. Page view information is shown as well, giving both users and content creators feedback on the page's popularity.

Users can tag the content on any site page via the tag box at the bottom of the page. This helps the search engine by associating user-generated tags with content.

The number of comments on a page is summarized at the top of the page, and any employee can add a comment at the bottom of the page. Previous user comments are listed at the bottom of the page, together with the commenter's name and when it was posted (for example, "Posted 3 days ago").

Throughout the site, the team paid attention to details such as button labels to make every function as clear as possible. For example, pages allowing commenting include a button called *Share A Comment*, rather than *Submit* or *Save*, to indicate that clicking the link will make the comment visible to others.



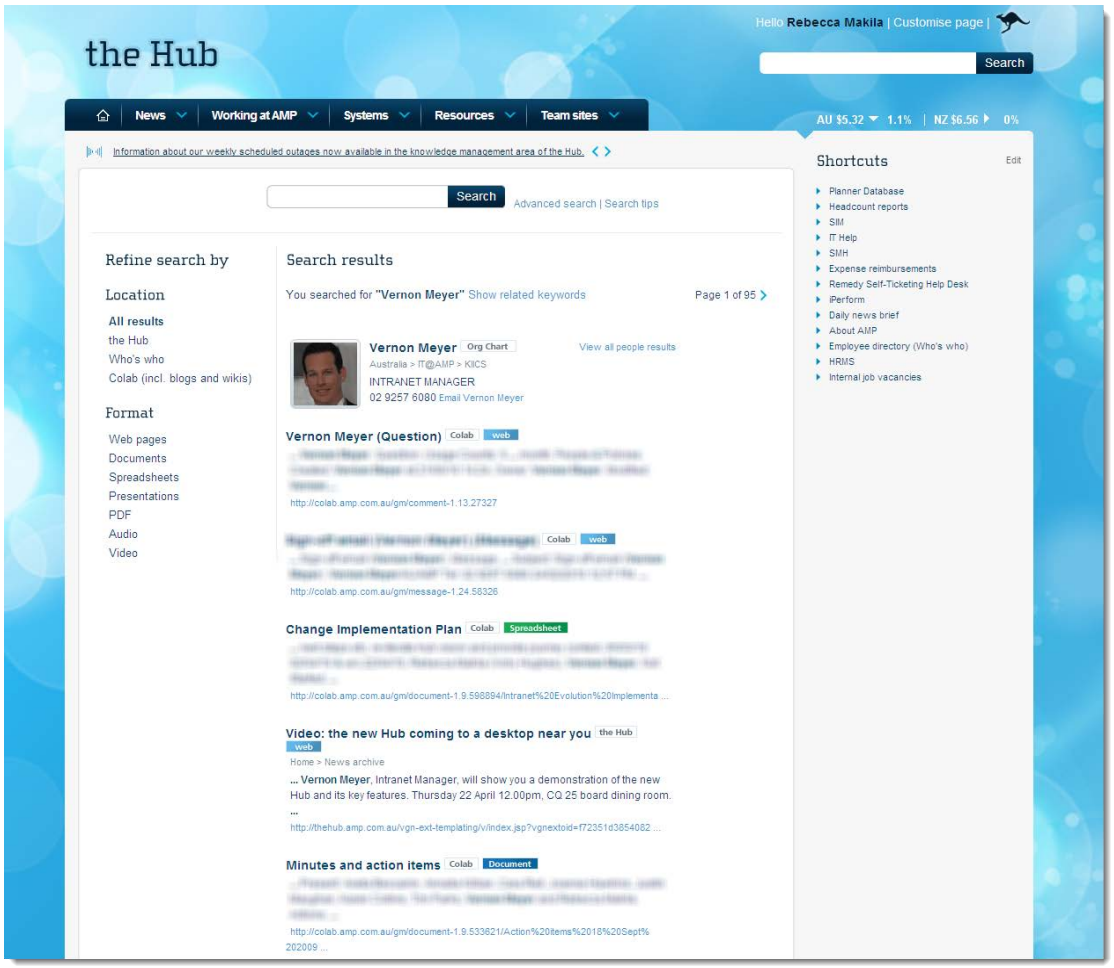
Pictured: Users can interact with the site in several ways, including rating content using a star rating scale, adding tags to help the search engine identify content, and adding comments.

Improving Search

Search was a main area team members needed to improve. They started with a new tool, but also understood the need to improve the content being searched in order to return strong results. They therefore added mandatory metadata fields to the content management system, and let users generate tags for all intranet and knowledge management database content. In addition, team members did keyword matching to expected results. Also, because they knew that employee searches were very popular, they weighted people results so they would appear high in the search results.

User-focused aids — such as predictive text, “did you mean,” the use of tags to execute searches, and filters to refine results — all help employees find the content they need. The biggest win? Users no longer need to visit a particular system to conduct a search. All intranet content is searched from the search box available on each site page.

Users can filter search results, and visual indicators help them scan results. *Colab* content includes anything in the collaboration space, including blogs, wikis, and documents. *The Hub* is any intranet content page, and *Who's Who* is the people directory. The site offers format filters as well, allowing users to see HTML pages, documents, spreadsheets, PDFs, presentation, audio, and video results. Color coding is intended to help users quickly locate formats — using red for PDF, for example, to match Adobe Reader's use of red, or green (as in Microsoft Excel's icon) for spreadsheets.



Pictured: Search results prioritize people matches. Filters for location and format help users narrow results.

User research and early planning clearly paid off in the new site. With a clean and clear design, a strong site structure, and improved search, the site has a lot going for it on the team's quest to win back users.

BACKGROUND

Using Research to Inform Decisions

Research informed the decision to revamp the AMP intranet. Employee feedback and outside-in thinking informed the process of obtaining business investment, while testing informed the decisions made throughout the redesign process.

“Employees told us that they had some major gripes with the intranet,” says Rebecca Makila, Internal Communications. “This included search not working effectively, fragmented team homepages, and difficulty in quickly finding content that was relevant to their jobs.”

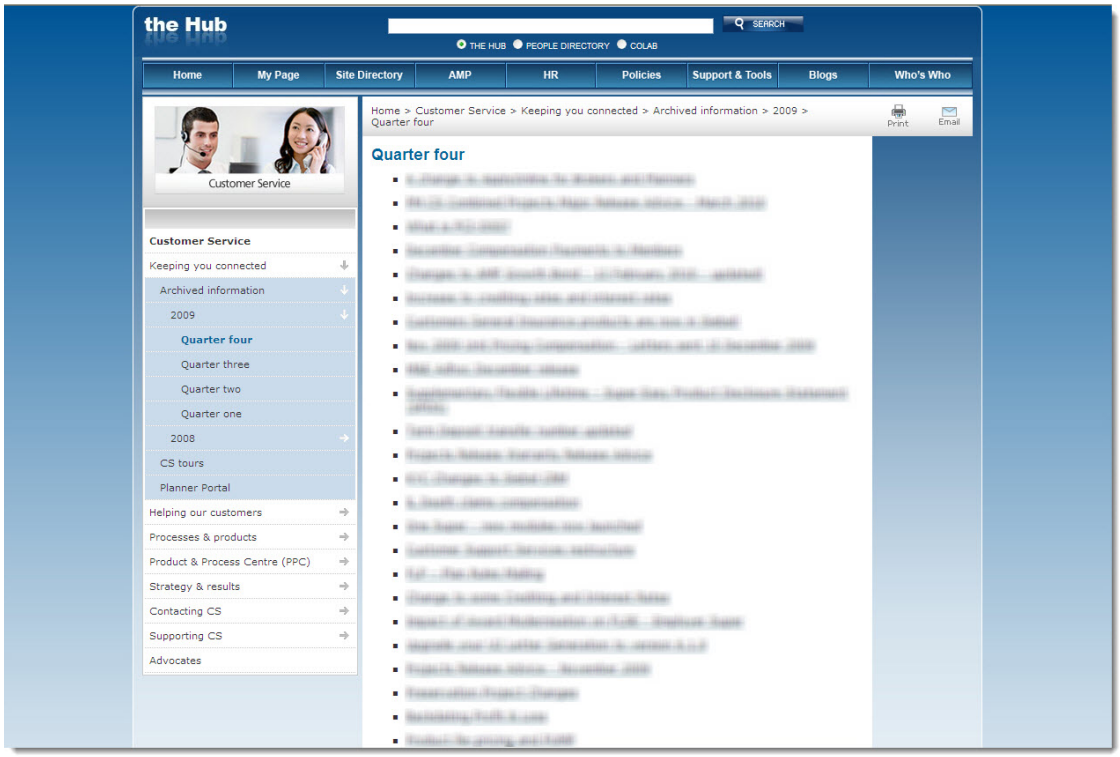
Employees said they struggled to find what they were looking for on the site, which fueled their desire for a reliable search engine. The search shortcoming was not trivial. Without the tools they needed to find the content they were looking for, the

intranet was falling out of favor, and employees were reverting to tried and true (albeit cumbersome) technology: email.

“Managers told us they find it difficult to target content direct to their employees and find it difficult to measure whether it has hit the mark,” says Makila. “In response to this, some teams were moving away from intranet-delivered content back to email.”

The intranet content reflected the structure of the organizational business lines and was duplicated across more than 30 team sites with “brochure-like” information about each of those teams.

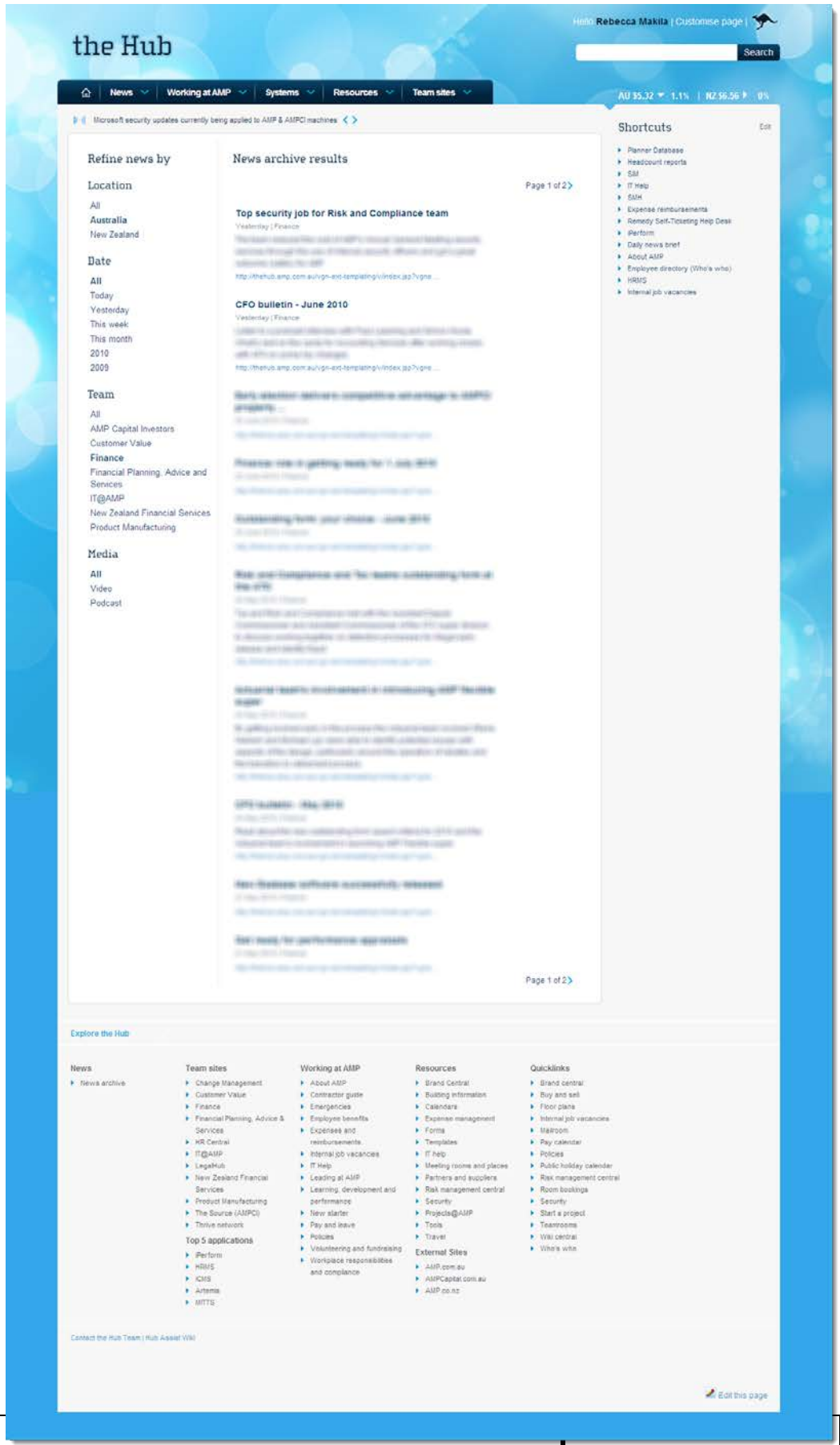
The April 2010 upgrade successfully addressed these issues.



Pictured: The old news archive required employees to know when content was published.



Pictured: The old search was clunky and required employees to know where content was located within the site structure.


the Hub
Hello Rebecca Makita | Customise page |
Search
News
Working at AMP
Systems
Resources
Team sites
AU $5.32 1.1% | NZ $6.56 0%
Microsoft security updates currently being applied to AMP & AMPCI machines
Refine news by
Location
All
Australia
New Zealand
Date
All
Today
Yesterday
This week
This month
2010
2009
Team
All
AMP Capital Investors
Customer Value
Finance
Financial Planning, Advice and Services
IT@AMP
New Zealand Financial Services
Product Manufacturing
Media
All
Video
Podcast
News archive results
Page 1 of 2
Top security job for Risk and Compliance team
Yesterday | Finance
CFO bulletin - June 2010
Yesterday | Finance
Page 1 of 2
Shortcuts
Edit
Planner Database
Headcount reports
SM
IT Help
SAM
Expense reimbursements
Remedy Self-Ticketing Help Desk
iPerform
Daily news brief
About AMP
Employee directory (Who's who)
HRMS
Internal job vacancies
Explore the Hub
News
News archive
Team sites
Change Management
Customer Value
Finance
Financial Planning, Advice & Services
HR Central
IT@AMP
LegalHub
New Zealand Financial Services
Product Manufacturing
The Source (AMPCI)
Thrive network
Top 5 applications
iPerform
HRMS
ICMS
Artemis
MITTS
Working at AMP
About AMP
Contractor guide
Emergencies
Employee benefits
Expenses and reimbursements
Internal job vacancies
IT Help
Leading at AMP
Learning, development and performance
New starter
Pay and leave
Policies
Volunteering and fundraising
Workplace responsibilities and compliance
Resources
Brand Central
Building information
Calendars
Expense management
Forms
Templates
IT help
Meeting rooms and places
Partners and suppliers
Risk management central
Security
Projects@AMP
Tools
Travel
External Sites
AMP.com.au
AMPCapital.com.au
AMP.co.nz
Quicklinks
Brand central
Buy and sell
Floor plans
Internal job vacancies
Mailroom
Pay calendar
Policies
Public holiday calendar
Risk management central
Room bookings
Security
Start a project
Teamrooms
Wiki central
Who's who
Contact the Hub Team | Hub Assist Wiki
Edit this page

Pictured: The team expanded the site's search filters to include country and the ability to find news by team. Search filters on the left-hand side of the page help employees navigate the news archive and get to the content they're looking for faster.

This initial upgrade was the company's first attempt to move away from an intranet architecture based purely on organizational structure.

"We wanted content that was organized around needs rather than [corporate] structure," says Makila. "Central to our upgrade is our focus on engaging employees as 'customers' of the intranet. We set out to win back their loyalty."

"We wanted the intranet to be all the things we promise our retail customers — easy to do business with, contemporary, aligned to the brand and, above all, customer driven," she says.

And as a result, employees are coming back to the intranet and using it regularly.

The team's research approach informed their understanding of what users really do in their day-to-day jobs, which let the designers build a task-based intranet. But they couldn't have achieved the upgrade without building a successful governance model to support the new intranet and gather organization-wide support.

Context for Change

During the same time period as the redesign, the organization was going through a major cultural transition. The objective was to make employees as efficient as possible as well as to connect them to each other and the outside world and thereby continuously improve their service to AMP customers. The intranet was necessary to support this goal.

"Within this context, it was vital that the online experience of the intranet and all associated systems enable this to happen," says Makila. "For example, part of this alignment was ensuring that the intranet helps employees feel connected with each other and the external marketplace."

"We wanted to help employees perform in their role by making it easy to find the content they need," she says. So, in essence, the intranet needed to:

- help employees do their job efficiently and effectively,
- play a role in communicating messages from leaders to employees, and
- offer forums for employees to communicate with each other and with management.

Other factors also converged leading up to the redesign, including:

- **Technology Platform Upgrade.** The company upgraded its technology platform for both the intranet and the external-facing websites from Vignette version 6 to Vignette 7 during 2007 and 2008. But due to the upgrade's magnitude, cost, and complexity, a redesign at that time was not possible.
- **Intranet Benchmarking Forum.** During this time period, the company joined the Intranet Benchmarking Forum and participated in a formal independent assessment to narrow the future redesign's areas of highest priority.
- **Innovation & Thought Leadership Festival.** The organization hosts an Innovation & Thought leadership festival every two years. This exposure to

external influences helped galvanize appreciation for the intranet's role as a working platform and enabler of seamless collaboration. It also unlocked the much-needed investment to fund the redesign.

INTRANET TEAM



Pictured: The AMP intranet team: (left to right) Annalie Killian, Joanne Hawkins, Vernon Meyer, Rebecca Makila, and Aneta Beocanin.

GOVERNANCE

Evolving Governance to Ensure Success

During the initial project stages, it was important to establish clear goals and objectives and guiding principles to facilitate the intranet evolution project. This is where the company's governance forum played an important role.

"The key to our success was improving the governance model for the intranet," says Vernon Meyer, Intranet and Innovation Manager. "We have injected clear strategic thinking and greater investment into the intranet to commit to a roadmap for its longer term development."

In 2008, the intranet was dropping off the company's roadmap and was not perceived as a key business tool.

"This resulted in a greater reliance on email and no investment for improving the intranet," he says.

To strengthen the governance around the intranet, IT and Public Affairs joined forces to clarify the intranet's role (as a business tool) and sell that role to the business.

"We formed a governance forum with representatives from HR, IT, Public Affairs, business lines, and external AMP site managers," says Meyer. "This group could not have been formed without the buy-in from senior leaders within IT and Public Affairs."

The forum meets monthly and played a major role in endorsing the project approach, gaining support from other senior leaders for the project, and acting as an advisor to

the project team. The forum was also responsible for pulling together funding from across the company to invest in the intranet's development.

Meyer says that, through their governance model, they've established mechanisms to ensure that all future systems:

- are consistent with the intranet online experience,
- ensure seamless authentication, and
- integrate task-related content within the intranet homepage.

Ownership

The Intranet business sponsor is the CIO, and the core team responsible for the intranet is in IT. The team reports to Annalie Killian, Director of Innovation, Collaboration, and Communication, which provides and manages the budget through a pro-rata charge-back model.

However, the intranet's actual design and leadership is an effective and collaborative partnership between IT, the Public Affairs team, and site owners. In addition to this, an intranet governance forum, with representatives from across the organization, was established to set the strategic direction and fund the intranet's upgrade.

"The collaboration and partnership between IT, Public Affairs, and site owners for the redesign was largely responsible for the successful design process and resulting outcome," says Meyer.

This ensures all decisions are made responsibly and with employee interests in mind.

"Where possible," he says, "we make decisions not based on ownership but based on our customer needs, research data, and analytics. This helps to overcome the politics of ownership."

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Intranet Core Team	• Provide governance, program management, coaching, support, and evaluation of site managers • Manage the content and features available across the intranet • Develop and innovate user features • Maintain continuous improvement through user research and site statistics • Train and support site managers
Site Managers	Manage their own sites within the intranet, including: • Promotion • Continuous improvement through user research and site statistics • News content creation and homepage news publishing • Monitoring and adjustments based on user statistics • Content and features available on the country or local site level • Support of local site content contributors
Content Owners	• Update and ensure consistency on their own intranet sections or pages

USERS

Employees across the organization use the intranet. AMP has 3,500 employees spread across Sydney and other major Australian capital cities. The organization also has staff in Auckland and Wellington, New Zealand, and smaller offices in China, India, Japan, the UK, New Zealand, and Singapore.

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	• http://thehub.amp.com.au
Default Status	• The intranet is the default homepage for all users
Remote Access	• Provided via VPN

DESIGN PROCESS AND USABILITY WORK

Design Approach

The redesign project was created to place employees and their needs at the heart of the intranet. Using the "employees as customers" approach helped the team focus its efforts on what the employees needed from the intranet. This was very important; as team members began their work, there were many ideas being circulated about what the intranet should offer — and few of the ideas were connected to what employees actually needed.

"Most of all," says Makila, "it was important for the team to use this approach to working with employees in order to be consistent with how we develop (as a business) offers for retail customers. This helped us to clearly communicate the need for improvement and validate the design with the business."

"The benefit of this approach," adds Meyer, "was that we were able to collect data on employee needs and make the correct design decisions throughout the project. We could backup decisions based on this data."

The team drew their design inspiration from a variety of sources. One approach included collecting hundreds of individual page elements from news, social media, design, and corporate websites and experimenting with layouts and designs.

"We did a lot of work around design themes that we considered both contemporary and aligned to the AMP brand," says Meyer.

The resulting design themes — bubbles and aqua — are based on a photographic effect known as Bokeh and were chosen because they resonated with employees during the user testing conducted as part of the redesign.

A third theme, "shuffle," has also been introduced. It is designed to be an event-based, rotating theme and will change over time. For instance, it was used during last summer's FIFA World Cup Games in South Africa.

The themes will be expanded over time to ensure the site offers personalization and freshness for the users.

Methodology

The team emphasized the early planning and scoping stages to avoid any major project issues. Regular team meetings ensured a collaborative approach between all involved, and risks and issues were responsibly identified and mitigated.

Involving the users in the design process was also critical to the team's approach. The team's methodology was determined by the overarching goal of ensuring that employees ("customers") were central to and involved in the design.

Three other factors contributed to the team's strategy:

1. Past intranet experiences
2. Research and best practices (across both intranet and Internet sites)
3. Partnering with organizations who specialized in certain disciplines and could advise the team on the best approach for the project's needs

Although research may have played a part in the project's success, it was the focus on engaging the audience that had the biggest payoff.

"Beyond the design methodology, the communication and influencing process was equally critical to success," says Meyer. "Understanding the various audiences and bringing an online project to life through using a range of highly engaging media worked extremely well."

These included tangibles like large poster boards of the concepts and mock-up designs, face-to-face presentations without technology, 3D physical models and installations, postcards announcing the countdown and instructions for launch day, a working online prototype to test, and entertaining video messages.

The team worked with employees in a series of formal workshops to determine business critical and common tasks and to rebuild the IA, following a methodology that included multiple card-sorting exercises, and wireframe and prototype development.

A prototype of the new intranet was built alongside the existing platform and, over a period of five months, was used to conduct one-on-one user testing across multiple scenarios and to improve the design. Employees from across AMP worked out the menus, layout, and functionality. The new menu is based on their needs and includes simplified crowd-sourced labels.

Uncovering Critical Tasks

Project team members worked with IA consultants (HotHouse) to develop a worksheet to use with groups of employees from across the company. This worksheet helped them uncover the common and business-critical tasks employees carry out in their day-to-day roles.

The information architects ran the initial workshops, and the internal project team led additional workshops across the company throughout 2009.

"The benefit from this approach was that the project team developed a good understanding of what people do in their roles — what the business critical tasks were — and figured out the common tasks across the organization," says Meyer.

Following the task analysis workshops, project team members conducted a number of card-sorting exercises and designed the site maps and wireframes that guided them through the design phase. They also researched best practice for intranets and conducted a review of emerging trends in intranet and Internet design.

Usability Testing

User testing sessions were conducted using a working prototype of the new intranet homepage with multiple individual users and a fresh cross-section of employees.

“The benefit of the prototype,” says Meyer, “was that the project team members strengthened our understanding of employee behavior for the new homepage.”

He says the prototype also helped the internal IT team to reuse the HTML, CSS, and JavaScript and shorten the development time.

User Personas and Supported Tasks

Personas

The team grouped employee needs and created personas to match the intranet features to these needs. The personas that emerged from these exercises included the following roles, along with their primary task needs:

- **Executive assistant:** These are team coordinators who often set up new team employees, look for information for their managers, download templates and forms, and so on.
- **Graduate/new hire:** These users look for information about AMP, employee benefits, how to set up their workspace, and how to find experts throughout the organization.
- **Project manager:** Start projects, access templates, share project news, and so on.
- **Customer call center team member:** Access up-to-date product information and breaking news alerts.
- **Subject matter experts:** Look for other knowledgeable people and write blog posts.
- **Senior leader:** Communicate with employees, consume news, and access leadership development materials.

Tasks

The key user tasks that emerged from this analysis exercise included:

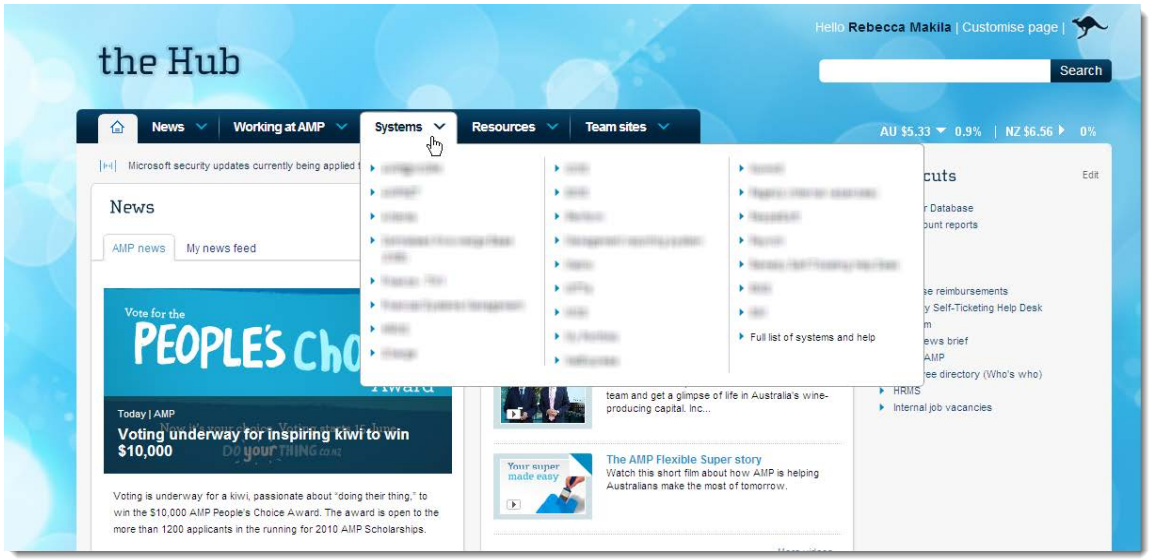
- I want product information (as an employee).
- I am a new hire, and I want to find out about AMP.
- I need to find a policy.
- I want to read past news items related to my team and AMP.
- How do I find out what to do in an evacuation?
- I have a new hire on my team. How do I set the person up?
- I need to access a system (such as submit a leave form, register for online training, submit my AMEX card statement, and so on).
- How do I use iPerform? (AMP’s online learning and performance management system, which includes help information.)
- How do I manage corporate card expenses and reimbursements?
- How do I find updated organizational charts?
- I need to share some important team news with specific groups across AMP.
- I want to find the right page when I am searching.
- I want to know what is required of me as an AMP employee and what benefits I receive.

- I want to find a tool (such as a template, form, or manual).
- I want to find information about a person, including contact details and expertise.
- I want to find specific team information.
- I want to find answers to common questions (such as how to set up system access, or find leave information or policy information on working remotely).
- How can I find IT information (for vendors, applications, or projects)?

These exercises helped the team achieve its project goals.

"It was vital that the online experience of the intranet and all associated systems would place our internal customer experience central to the design," says Makila.

"For example," she says, "part of this alignment was ensuring that the intranet helps employees feel connected with each other and the external marketplace. We wanted to help employees perform in their role by making it easy to find the content they need. Our intranet needs to help employees perform their job functions more effectively."



Pictured: The *Systems* mega-menu displays business critical and commonly accessed systems across the organization. Employees determined these elements as part of a card-sorting exercise. All the key systems, resources, policies, and tools are readily available for employees to access under the mega-menus and in the footer. Systems and resources have landing pages that list all systems and resources used in the organization and provide contextual help for employees, such as login and contact assistance. The menus are also location aware.

Drawing on Outside Expertise

The AMP team relied on outside consultants for the project, but only as much as was needed to get the job done. They kept the consultants' participation to a minimum in order to maximize internal skill-development opportunities and save money.

The following agencies and consultants participated in the AMP project:

- **Hothouse information architects.** The project team worked with HotHouse to develop a user research approach and a worksheet to use with groups of employees from across the company. This worksheet helped uncover the common and business-critical tasks that employees carry out in their day-to-day roles. The AMP team worked with the information architects to run the first few workshops; the internal project team then rolled out additional workshops across the company. This occurred throughout 2009.
- **Morgan Creative.** Morgan Creative developed and hosted the intranet prototype that was used to conduct the user test sessions. The prototype let designers rapidly iterate on any interface changes. It also helped the internal IT team reuse the HTML, CSS, and JavaScript, and shorten the development time. Morgan Creative also developed the mobile prototype.
- **Gruden Design and Development Agency.** The team worked with Gruden to optimize the front-end page load times, specifically relating to image optimization, increased JavaScript compression and the optimal placement of images and JavaScript assets in HTML.
- **Andrew Boddy Design.** Boddy worked closely with the internal design team to supply early design concepts that were brand compliant and used to help company stakeholders visualize the redesign project.
- **Projekta Digital Production Agency.** Projekta assisted with the change communication process and built a 3-D physical model (see photo below) of the intranet for display in the reception area of AMP's Sydney headquarters as part of the launch announcements. They also produced a launch video featuring employees talking about the improvements to the intranet.

TIMELINE

INTRANET TIMELINE	
Milestone Date	**Milestone Description**
2002	• Multiple intranets exist across different geographical locations • Design and editorial guidelines documented
2007-2008	• Large CMS upgrade project (from Vignette 6 to Vignette 7) • Intranet relaunch with new homepage and menu structure
June 2008	• Introduction of formal governance model and strategic roadmap for 2009/10
April 27, 2010	• Hub Evolution project — Phase 1 launch. This was a full intranet redesign, including a comprehensive content audit and restructure to focus the intranet on: o Employee needs o Identity o Location o Usability o Search

CONTENT AND CONTENT CONTRIBUTORS

A System Based on Trust

Content is managed using a decentralized model comprised of site managers within the business who manage team-specific content and news. There are approximately 20 content contributors in this role; all employees can contribute content through blogs, wiki content, comments, tags, or ratings.

The organization relies on an oversight model based on trust rather than moderation.

“There is no formal intranet moderation, as we have clear content policies,” says Meyer. “It is a trust-model.”

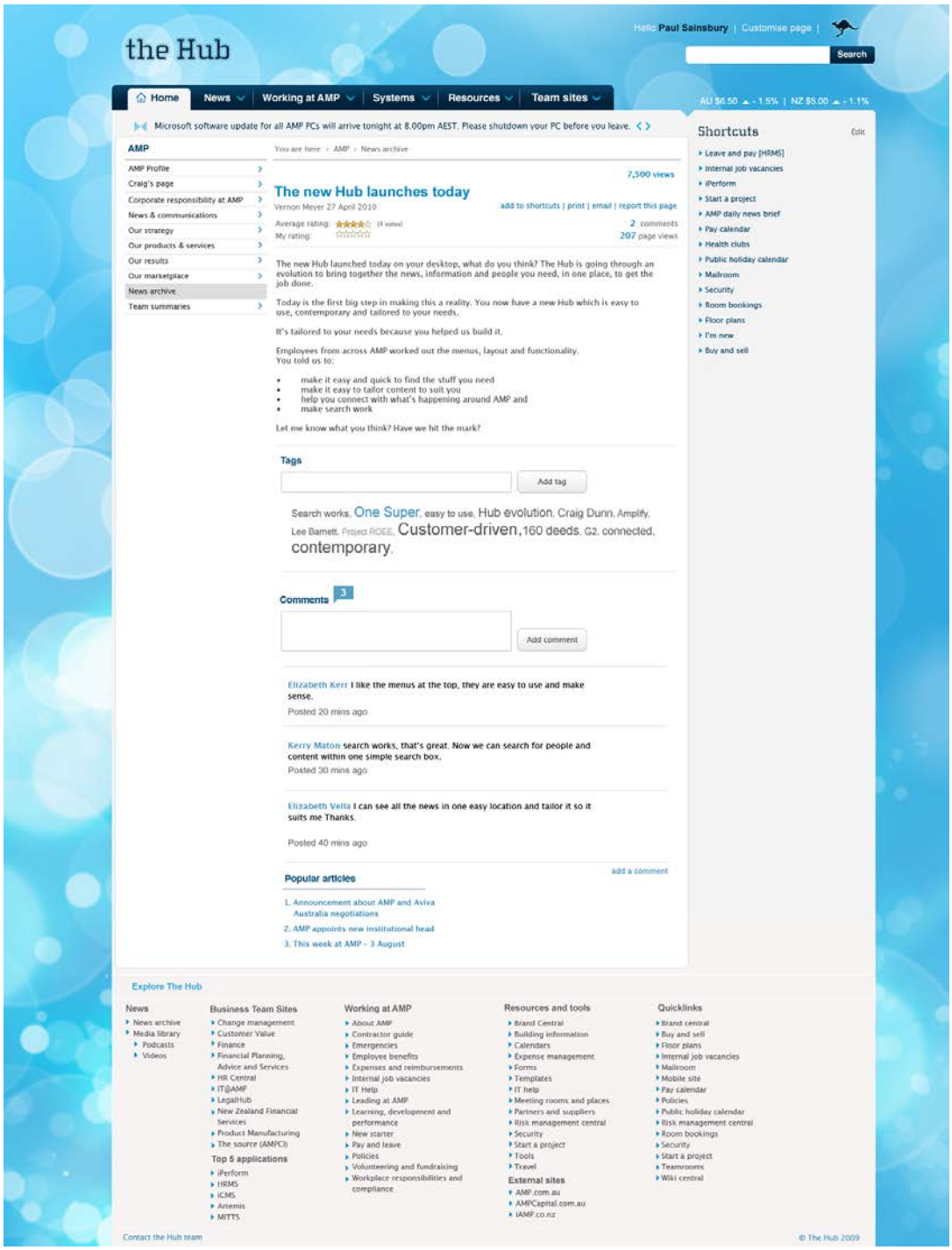
Content publishers from across the business receive training and support from the intranet team.

The Public Affairs and intranet teams informally monitor content to ensure consistency. New site owners sign up for a *Roles and Responsibilities* document to assist with content governance. And all sites are reviewed annually for errors, link errors, and outdated content. New content publishers receive a quick reference guide as part of their training, and they also have access to training videos and an intranet

wiki. These new publishers are also given one-on-one publishing training from the intranet team.

In addition, the team has established the following policies and guidelines that cover intranet content:

- An intranet style guide, which includes guidelines for writing style, formatting, fonts, tables, brand guidelines, and so on
- Landing page style guidelines for team sites
- Four content type templates developed for content publishers



Pictured: A content page example with a tag cloud. The tag cloud contains keyword or phrases that were previously entered. Any employee can tag content. Clicking on a keyword or phrase from the tag cloud displays a listing of all other content pages that share the keyword or phrase. This approach makes it easy for users to find related content across the intranet.

User Feedback as a Guiding Hand

Feedback is as much a governing principal as any other guideline or training mechanism for content publishers. At AMP, employees are the intranet's customers and content publishers receive feedback via the ratings, comments, and traffic their content receives, as well as cross-postings via Yammer and blogs.

"Content contributors are recognized and thanked by the intranet team for high-quality content," says Meyer. "We contact authors to walkthrough any issues with content that is not compliant with our writing guidelines — however, this is very rarely necessary."

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and O/S	• Several IBM pSeries LPARS running the AIX O/S
Bug Tracking/Quality Assurance	• A custom-built bug tracking application and performance tests running on IBM Rational tools
Design Tools	• Photoshop • Paper prototypes
Site Building Tools	• Eclipse, Firefox, and Internet Explorer developer extensions
Content Management Tools	• Vignette Content Management and Vignette Collaboration
Search	• Google Search Appliances

MOBILE

AMP intranet content was optimized for mobile consumption. The mobile site was designed as the company's first step toward serving device-specific intranet content to employees. Because the company has a number of staff members who are often away from their desks, this functionality was key in providing a full intranet experience.

"We provided a mobile version of the site because the mobile experience is pervasive and employees asked for device (including mobile) delivery," says Meyer.

The mobile intranet site uses a style sheet, optimized for a fast and efficient mobile experience. But because the organization is still in the early stages of mobile delivery, limited functionality is enabled for mobile access. For example, any Hub article content can be viewed on a mobile device. Article content is offered specifically because it contains news that is relevant to the organization's mobile audience.

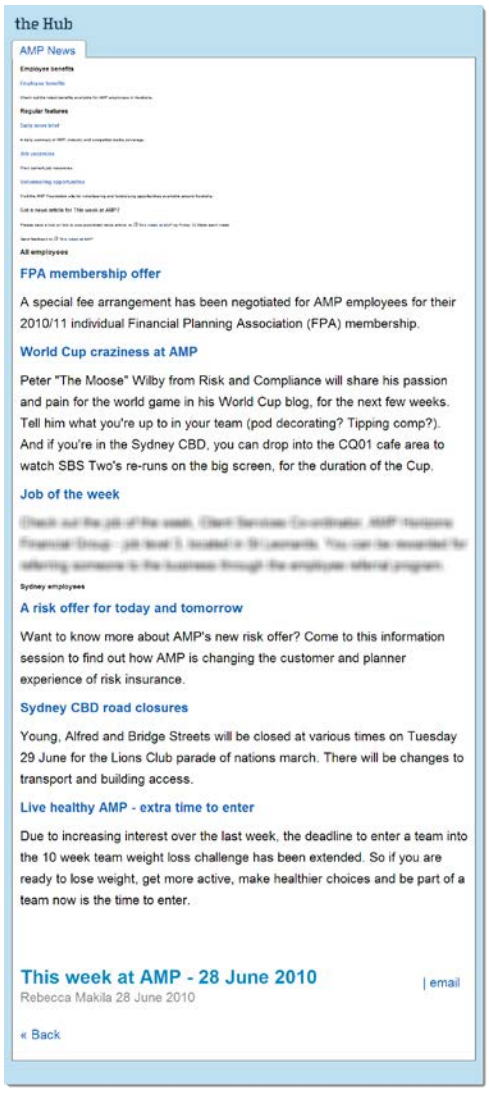
Mobile-Specific Usability

Because mobile devices have unique usability challenges, the team wrote the business requirements and functional specifications to cover all mobile needs and to address platform-specific usability concerns.

For instance, the speed at which mobiles download content was important, as were security settings. The team therefore built a prototype to test the mobile capability for RIM Blackberry mobile devices.

"Presently," says Meyer, "the mobile intranet site is fast as it uses a basic style sheet, is text-based (reusing our intranet code), and does not serve images or JavaScript."

The site has simple navigation options: the logo, which is a link to the homepage, and a *back* link on all article pages.



Pictured: Intranet content is available on AMP mobile devices, which assists staff members who are on the road. The company has a number of staff members who support planner practices and are often away from their desks. The mobile intranet site uses a style sheet optimized for a fast and efficient mobile experience.

SEARCH

Building a Great Search Experience

Effective search is an important component of the overall user experience. The AMP team appreciates that and took great care in designing a great intranet search tool.

“Because search is critical to intranet success, we spent a lot of time defining what our search experience needed to offer,” says Meyer. “We believe that a good quality search solution is the cornerstone of an effective intranet.”

And, prior to the site redesign, this is something that they hadn’t been able to achieve in the AMP intranet for some time.

Choosing a search tool required team members to perform due diligence to ensure they chose a product that met a wide range of criteria.

“It needed to match our requirements,” say Meyer, “but also be fast, scalable, and cost effective. It needed to be supported by a local partner and provided by a vendor that was a good strategic fit with AMP.”

The Google Search Appliance was selected because it met each of those criteria, and because the vendor, Google Australia, assisted as needed to get them up and running.

“Google Australia demonstrated their capability and great technical support by working with us on a successful early prototype,” says Meyer.

Refining Search Results

What every team learns about search is that search is not a set-and-go product. The tool has to “learn” and the team has to refine its functionality over time. To accomplish this task, the AMP team implemented the Google Search Appliance solution in a soft launch before the intranet redesign went live to improve relevancy through the search tool’s self-learning capability. Early (primitive) fine-tuning was done by matching keywords to expected results. Monitoring users helped fine-tune it even further. The team used test cases that measured both search effectiveness (can users find an answer in under 30 seconds?) and search efficiency (was the task completed correctly in the first attempt?). They also took user preferences into account to refine the results.

“Research told us that employee searches were one of the most important search-related tasks, so we weighted people results highly,” he says.

To further improve the search results, the engineers built mandatory metadata fields into the content management system to improve search results and drive the customization of information.

“We have also integrated user-generated tagging on all intranet and knowledge management database content items to improve search and help employees to have a say in key word generation,” says Meyer.

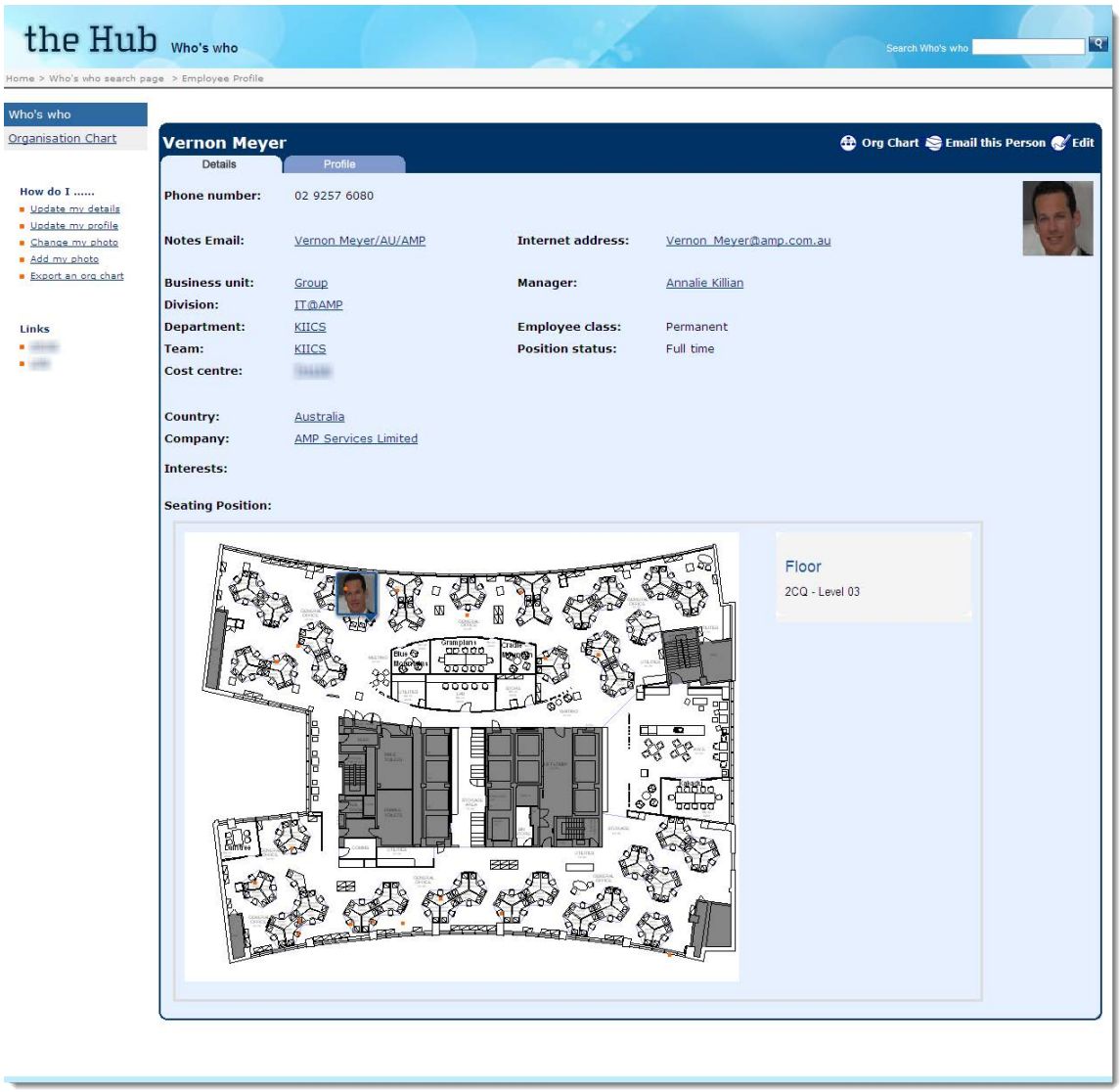
The team built best practice search principles into the search, including:

- Autofocus into the search box on page-load
- Predictive text
- “Did you mean...”

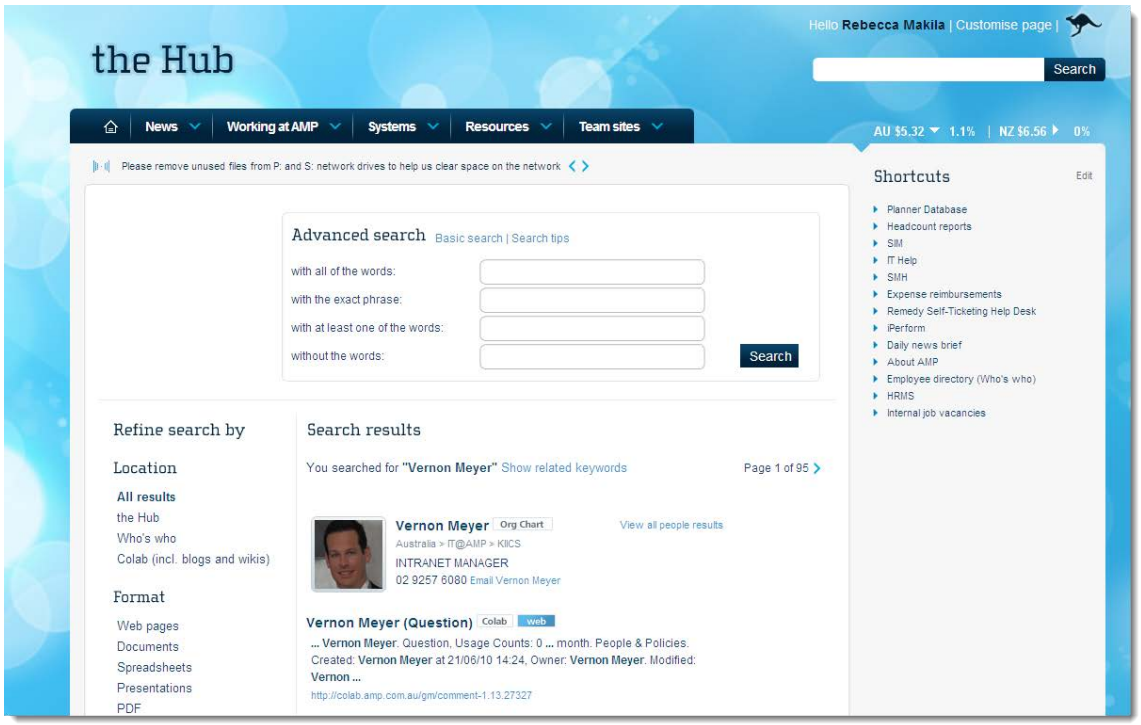
- Tags within intranet pages that users can click to execute a search
- Default filters to further refine search by location, date, format type, and so on.

All of these efforts have paid off. Employees no longer need to visit a particular online system to conduct a search because they can easily perform it within the intranet on any page. The improved search has received the most positive comments of any area since the redesign launched.

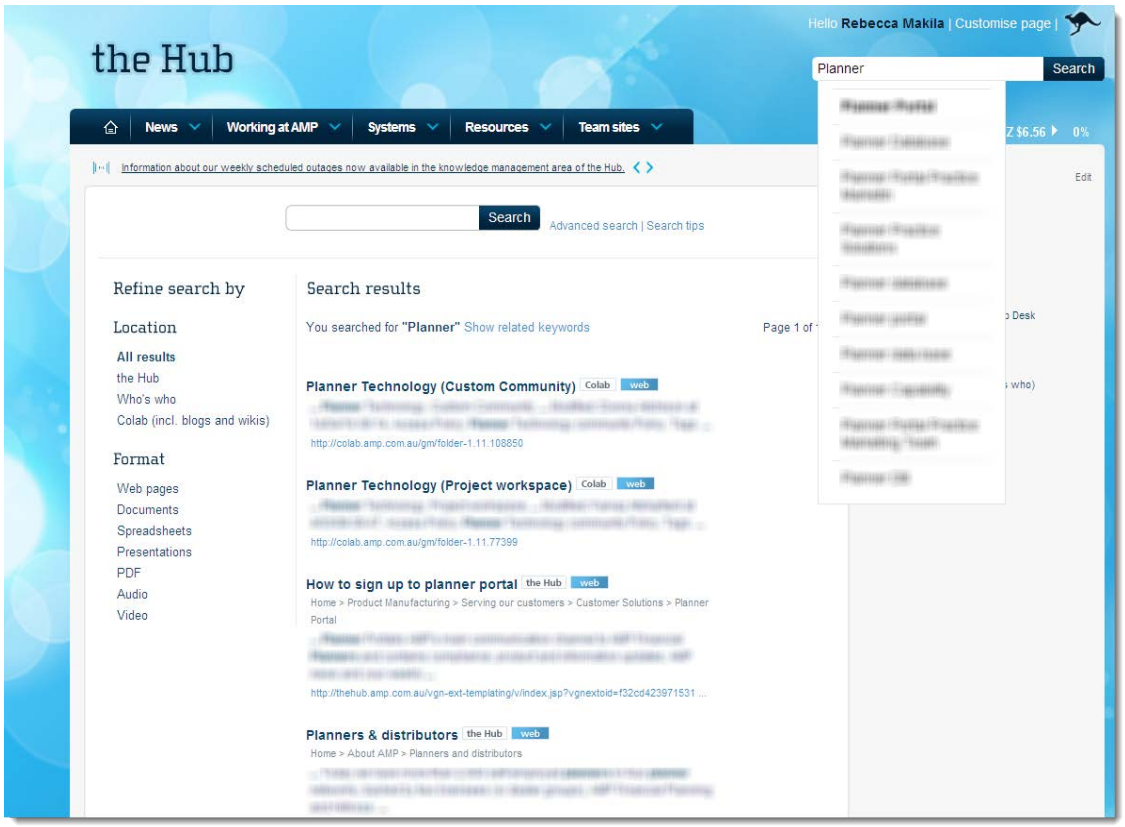
“Employees were pleasantly surprised that it actually worked,” says Meyer. “We picked up on this during our early testing and were attentive in our launch communications to admit to the poor search experience in the past and encourage employees to try the new search solution.”



Pictured: The employee directory includes functionality that lets employees drag and drop their profile picture to any desk location on the floor plan.



Pictured: Employees can conduct an advanced search by applying additional search parameters.



Pictured: The intranet search solution uses auto-complete to save time and minimize spelling errors.

RESULTS AND ROI

Measuring gains resulting from intranet improvements can sometimes be tricky. So teams often choose metrics that show increases in user satisfaction to confirm that a new intranet has hit its mark. That is certainly the case at AMP.

"The project success was measured through employee satisfaction, the number of reported defects, and comprehensive site analytics," says Meyer. "Employees have indicated that they are returning to the intranet as their collaboration and knowledge management platform."

Other indicators of the new intranet's success include:

- Fewer critical intranet issues, such as downtime and errors
- Content is up-to-date and relevant, making it easy to get things done
- Roles and responsibilities for content publishers and site owners are now clear and understood
- Web statistics show increased usage and time spent on the intranet
- The intranet team successfully achieved its project goals and objectives
- The intranet has a respected profile within AMP and remains well positioned for future investment

And perhaps the most marked improvement in the site is how often it's used.

"We had many individual metrics," says Meyer, "but the standout was search usage, which jumped 300 percent. This, along with positive employee feedback, showed that employees were getting the results they needed."

Another key metric for the platform's success is that while usage has gone up, support calls have gone down. "Although almost all redesign changes were improvements on the past intranet," says Meyer, "it was surprising that the number of support calls post-launch were reasonable low."

"It just works, as it should," he says.

Another testament to the team's success is illustrated by how often other intranet teams seek them out for advice.

"The intranet team is now regularly asked to contribute the usability viewpoint on the selection of other enterprise business process vendors," says Meyer.

LESSONS LEARNED

With the success of an intranet project comes some institutional learning — some is simply a result of experience, and some is hard-earned in overcoming obstacles. Members of the AMP team share some lessons learned from their project:

- **Project success starts at the top.** "Form a governance team to assist in getting buy-in from senior management and secure funding early."
- **Iterate often.** "Use prototypes (even if they are on paper). For a redesign such as ours, we focus on three core areas: search, IA, and people (profiles, personalization, customization, and content interaction)."

- **Communicate early and often.** “Effective engagement and communication is as important as design. It’s about people, not technology.”
- **Give employees choices.** “Compliment functionality with design to ensure employees enjoy visiting the site. Adopt the philosophy about allowing employees choice over their experience, such as tailoring their own newsfeed, or selecting location-specific news or the theme that they enjoy the most.”
- **Treat employees as customers and listen to what they need.** "Understanding your ‘customers’ (your employees), working with them, and balancing their needs with the organizational strategy and culture that your intranet needs to enable is the single most important thing for an intranet designer to focus on and champion.”
- **Don’t compromise on the customer experience.** “Surround yourself with the best you can find to help you execute within the constraints of platform, budget, and time. Don't compromise on the customer experience — it’s penny-wise, pound-foolish in the long-term."

Credit Suisse AG

Using the intranet:
Credit Suisse is a leading global financial services company, offering clients financial advice in all aspects of investment banking, private banking, and asset management.

Credit Suisse pursues a client-focused integrated bank strategy, focusing on complex client needs and value-adding businesses, leveraging the global expertise of its three divisions: Private Banking, Investment Banking, and Asset Management.

Headquarters: Zurich, Switzerland

Number of employees the intranet supports:
49,200 from approximately 100 different countries

Company locations: Credit Suisse is active in more than 50 countries

Locations where people use the intranet:
Employees in most of the company's locations use the intranet

Annual net income: $6.7 billion (year ended June 30, 2009)

Design team:
In-house, 10 people formed the core team. Noise AG developed the visual design. Stimmt AG consulted on the IA strategy.

Members:
In-house: Jamal Sadick, Head Corporate Design and Corporate Web; Christian Sebregondi, Head Interactive Media Services; Stefan Büchi, Head Corporate Web; Andreas Zogg, Head Web Identity; Gerhard Schauer and Barbara Müry, Web Strategy Managers; Lukas Müller, Linda Buschke, and Aidan Bonel, Key Account Managers; Isabel Herzog and Mark S. Hirst, Web Identity; Andrea Bargetzi, Intranet Program and Project Manager; and Christopher Schmidt, Peter Landolt, and Oliver Staubli, Project Managers

Noise AG: Patrik Giacobbo, Creative Director

Stimmt AG: Lukas Karrer, Intranet Strategy Consultant

SUMMARY

Content customization was a key element of Credit Suisse's latest tweak to the corporate intranet. The current design is a milestone in a long-term intranet strategy dating back to 2007. The team based its changes on in-depth user and stakeholder research, including field visits, user tests, workshops, and brainstorming sessions.

In their research, team members were surprised to hear employees say that they wanted customization features so they would have more control over the content they saw. Users wanted to see content that was relevant to them and the work they did.

This can often be done via personalization, but content personalization can be tricky in an enterprise with 49,200 employees. So, the team implemented a combination of push and pull content. The team enabled broad personalization by creating 46 communities of users defined through a matrix of the user's division and location (for example: Investment Banking — Asia Pacific). User's default content is delivered based on membership in those communities.

In addition, special communities allow membership across the main communities. Users are assigned to those communities based on 25 particular attributes that they can set in their personal profiles (such as location, grade, preferred language, and skills). These special communities provide a foundation for cross-community targeted content.

So, content is now pushed to users based on their broad identity. But to enable users to get content even more specific to their needs, the homepage lets users customize content as well as its placement on the page. Users can customize content to reflect specific roles and tasks and can add, move, or remove boxes.

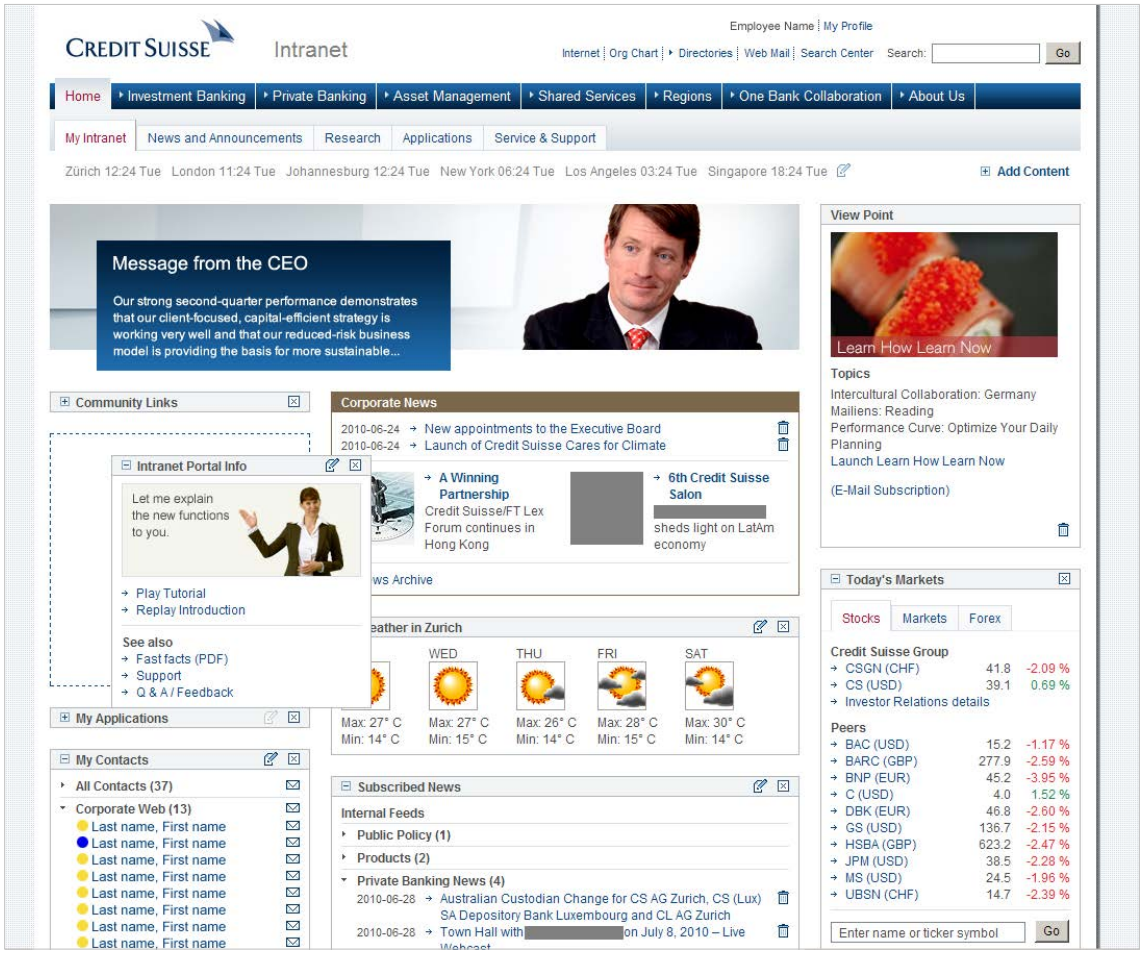
Users can move or edit any content areas except the main news area (featuring a message from the CEO in the screenshot below) and corporate news. News is added by more than 200 employees in the organization in a decentralized publishing model and can be targeted to communities and special communities as well, according to such employee attributes as division, rank, and region.

Users can expand or collapse sections using the plus and minus icons, or remove them completely. They can also edit the content within a module. In addition, users can remove individual items within a content box by clicking on the trashcan icon that appears next to some items.

Customization doesn't stop there, but extends to the additional option to customize the world clocks featured at the top of the page. With many employees doing business internationally and across time zones, the site includes the option to customize the locations and time zones displayed on the site.

The team worked hard on a design to accomodate users customizing and organizing content without overwhelming the page. They created a neutral design that would make any grouping of content as visually pleasing as possible.

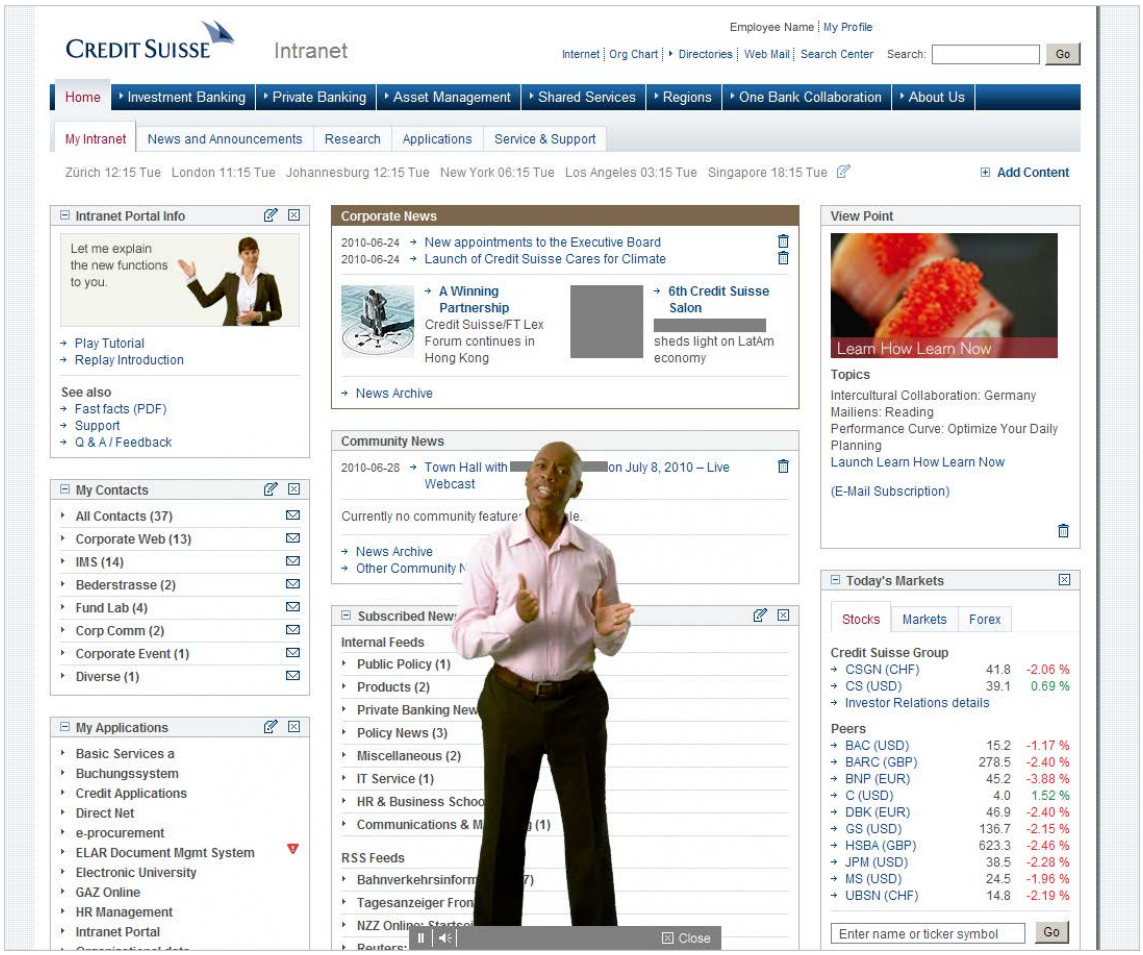
One of the key elements of customization on the site is the drag-and-drop functionality, which lets users move content modules and order content within modules, as appropriate.



Pictured: The Credit Suisse intranet homepage lets users add and remove content, as well as move or reorganize it, with drag-and-drop functionality.

The team implemented drag-and-drop functionality to make it easy for users to customize content, which is one of the key factors in encouraging users to take advantage of customization tools. However, they found in testing that expert users naturally discovered the drag-and-drop function, but novice users did not realize the site's customization potential. In testing, however, novice users were successful and even liked the functionality when it was introduced.

In response to this, the team decided upon launch to provide video avatars to introduce users to the new portal, as well as its new, key customization functionality. The videos encouraged users to actively design their intranet experience. The avatar videos were well received. The team also provided intranet help pages with FAQs, support site access, and further information on the new portal.



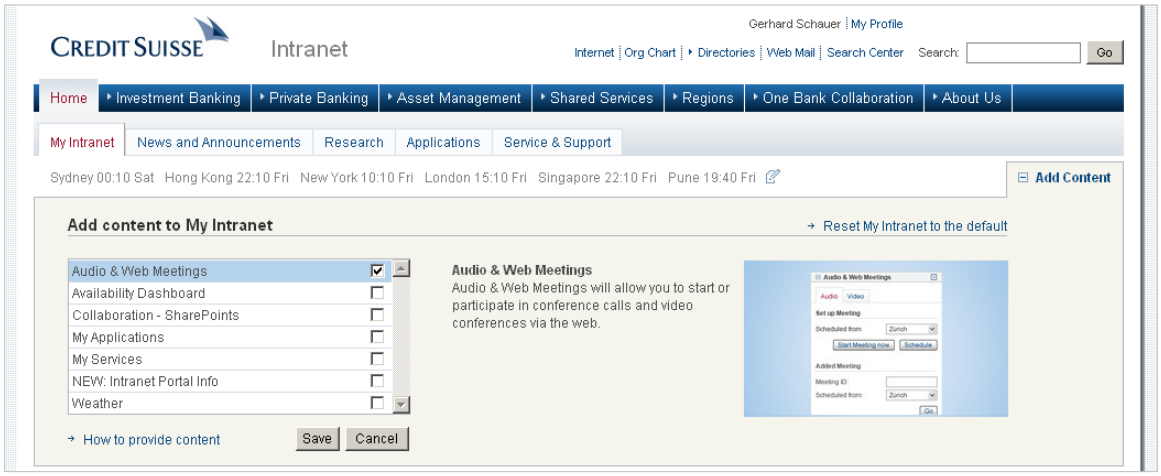
Pictured: Video avatars introduced new site functionality, such as content customization and the drag-and-drop function, when the site launched.

To add content to the page, users go to a content store via the *Add Content* link in the top right corner of the page. This content catalog presents a list of items that can

be added. When a user selects an item, a brief description of the item and a thumbnail sample of content appear.

Some content options let users see personalized information through the site. Users can see *My Enrollments* for training information, *My Contacts*, or *My Tasks*, for example, or can created customizable lists of applications and services.

The content boxes are produced and delivered by many different business units and are offered to defined user groups. Business units have to fund content boxes on their own, inspiring quality content and thoughtful additions.



Pictured: Users select content from the content store, which offers information from many different business units as well as productivity, navigation, and scheduling tools.

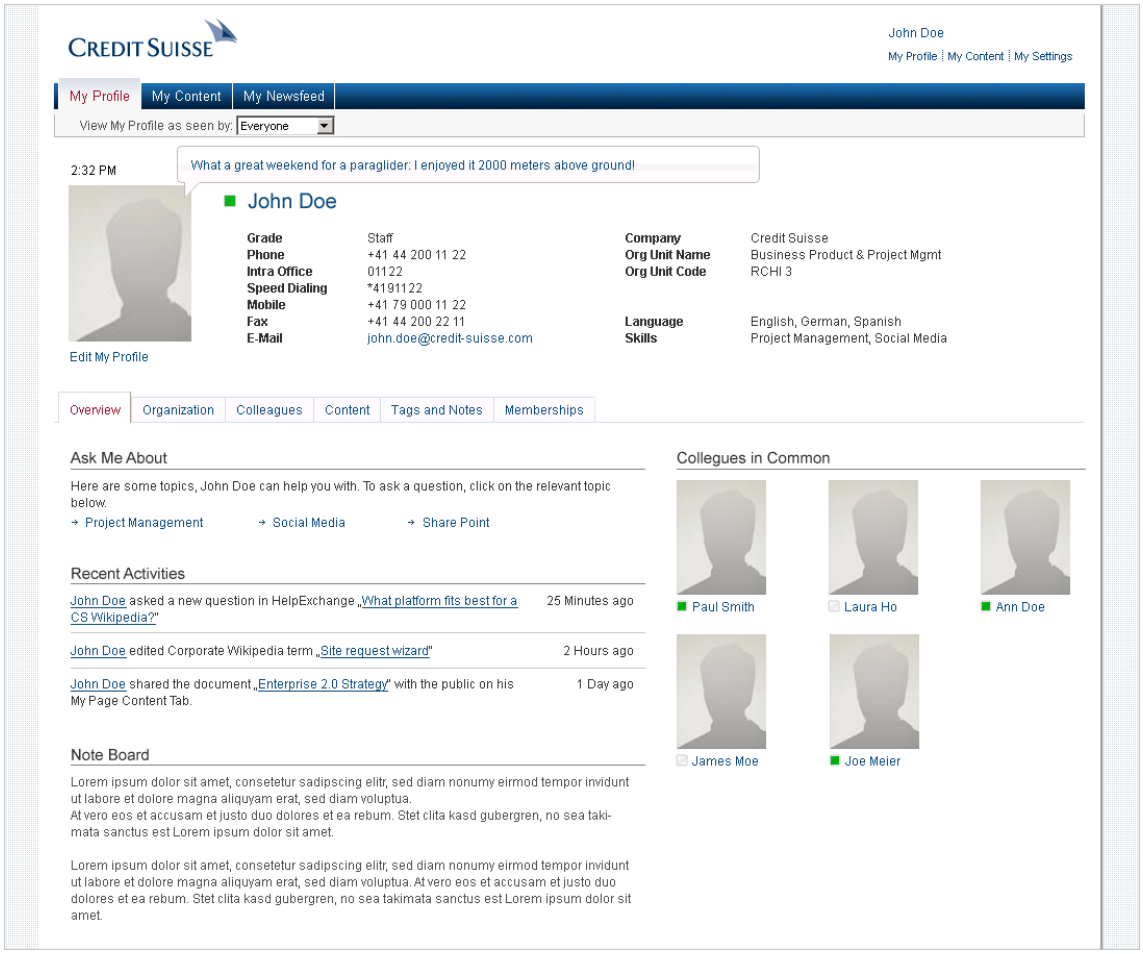
The intranet is intended as a platform for users to share work, skills, interests, and opinions with colleagues, teams, or groups. The redesign aimed to emphasize the employee, rather than content.

The employee directory is the main tool allowing users to share information across the organization, providing a foundation for the new employee-centered approach. Special community memberships, which help to personalize content on the user's homepage, are based on attributes set in the user's profile, or *MyPage*.

MyPage acts as a central location for social media activities and ad-hoc sharing. The page enables knowledge exchange by giving users a way to distribute knowledge in a controlled way. It is intended as a platform for users to share work, skills, interests, and opinions with colleagues, teams, or groups. *MyPage* is in a pilot phase and will be rolled out globally in 2011.

Users can add their own areas of expertise in their profile's *Ask Me About* section. Here, users can add skills that go beyond those learned in on-boarding, education, or training. This information is used within the site for expert searches, and it is the user's responsibility to self-promote correctly.

The user's page also summarizes recent activity on the site, such as posting a question, editing a wiki, or sharing a document. A microblogging feature allows users to update their colleagues. The *Colleagues in Common* area of the page shows users connections between themselves and the person whose profile they're viewing.



Pictured: Employees can use *MyPage* to update and inform colleagues by microblogging or by updating *Ask Me About* expertise information. The page also summarizes the employee's recent intranet activity and, of course, provides contact information.

HelpExchange is a new addition to the site that also encourages collaboration and knowledge sharing. Still in pilot phase (and not yet approved for global roll-out), this site area allows any employee to post any factual question. Any other employee can answer that question, allowing fact-based knowledge exchange across the organization.

The system is self-regulating, meaning that the employees are in charge. *HelpExchange* is run by all employees and regulated by a set of rules intended to improve the quality of answers. For instance, questions can't be subjective, argumentative, or require extended discussion. *HelpExchange* is a question-and-answer board, not a discussion forum. Further, questions cannot include client or business information or breach legal or compliance policies.

Any employee can post a question. The system is self-regulated through the use of reputation points. Reputation is a rough measurement of how much the employee has proven his or her trustworthiness through actions on the site. Reputation is earned through convincing others that you know what you're talking about by contributing questions, answers, or comments.

Employees can also vote for good questions or helpful answers. Each vote earns the author 10 reputation points. Employees vote down off-topic or incorrect answers, subtracting two reputation points. An employee can earn up to 200 reputation points a day, but no more.

Each time a question or answer is voted up, the person who asked the question receives 10 reputation points. Asking or answering a question does not require any reputation points. Reputation points are a measure of how much the *HelpExchange* community trusts a user.

Users earn the right to further participate in the *HelpExchange* when they accumulate reputation points. Users need 15 points to vote an item up, and 15 to flag content as offensive. Leaving comments requires 50 points, and voting down requires 100. At 250, they can vote to close or reopen a question or create a new tag. At 500 points, they can retag questions, and at 2,000, they can edit other people's posts. At 3,000 points, they can vote to close or reopen any questions, and it requires 10,000 points to delete closed questions or access moderation tools.

Once users reach the highest levels, they are essentially moderators. This allows the community to run the *HelpExchange*.

The tool has proven to have great value to IT development teams and shared services teams, who regularly check to see if their expertise is needed in the organization. For example, the Web team will check for opportunities to post guidelines as answers to design-related questions from colleagues.

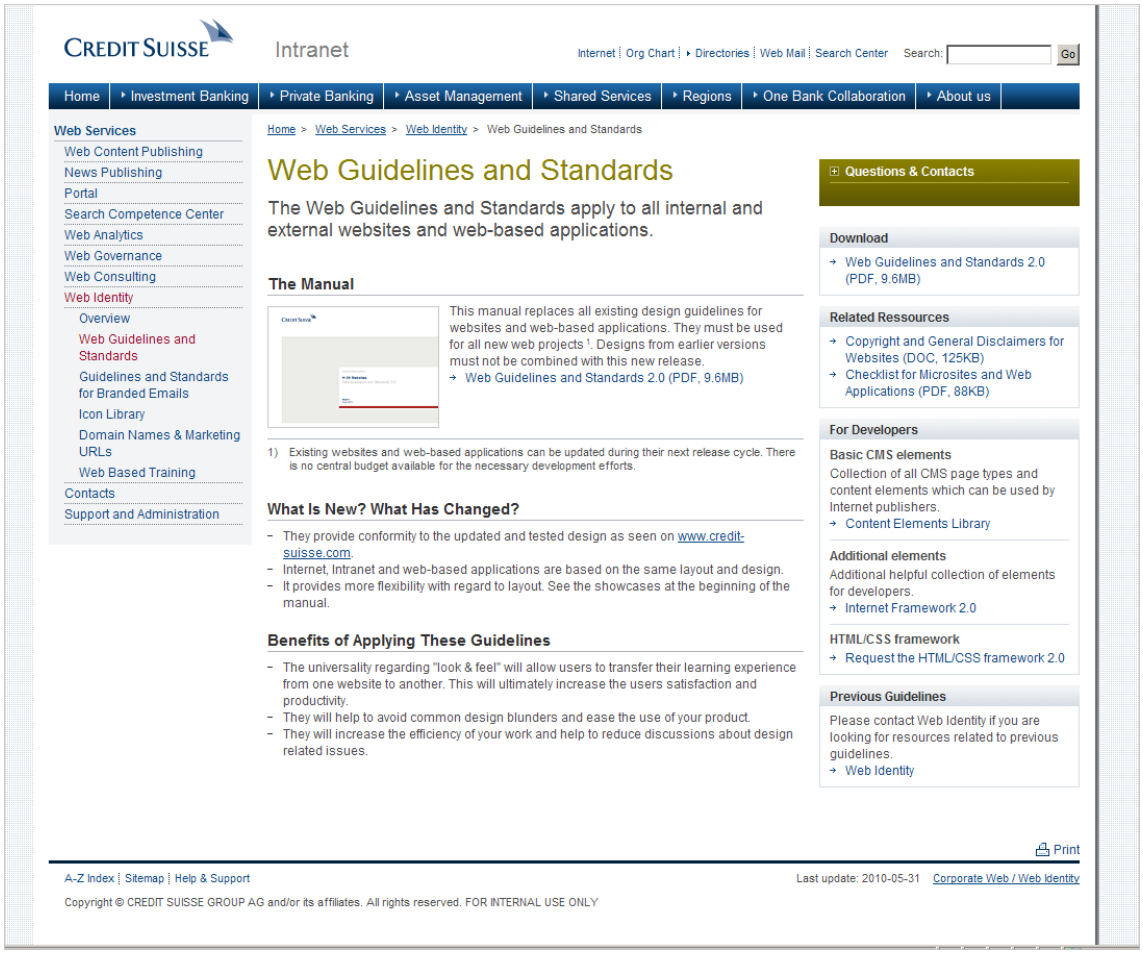
The team considers the initial pilot to be a success, noting that more than 95% of questions have an answer that another user has voted up, meaning they found the answer to be relevant and useful.



Pictured: *HelpExchange* allows users to post questions and answer other users' inquiries. Reputation points help the system self-regulate, providing more access and functions to users who have proven themselves trustworthy by providing reliable content.

Despite the different technical systems employed on the intranet homepage, *MyPage,* and *HelpExchange*, a consistent experience has been established throughout the intranet. This has much to do with the content management and WYSIWYG editing tools, which let decentralized content contributors create pages, and the presence of good support and Web guidelines applied across the various technical systems.

These support tools include Web-based learning tools for content creators, featuring video and voice recordings, a comprehensive guidelines manual, one-page quickguides, and an up-to-date FAQ. The support mechanisms combine to make the user interfaces feel integrated and "one," and ensure the different systems are used in a consistent manner.



Pictured: The site has a clean and consistent design, helped by the site's content management tools and clear information for content publishers.

Personalization, customization, and collaboration all work together on Credit Suisse's intranet to meet user needs and build relationships.

Background

Back in 2007 when the Credit Suisse team members first started assessing the communications and technology challenges the company was facing, they identified many key issues that would drive their approach to intranet development. These issues included:

- Employees had to interact with an increasing range of applications, information and people
- It was difficult to access specific information and applications relevant to employees' work
- There was no enterprise-wide content taxonomy, which hindered the creation of an easy to understand information retrieval and distribution system
- The company had not established a business value-oriented measurement system

- Employees had to visit many different technology platforms, each with its own user interface
- Data silos and system- and organization-centric content hindered knowledge exchange and collaboration across business units
- Employees were regularly by-passing the news portal as the entry point to the intranet
- The proliferation of new tools and opportunities (both internally and on the Web, such as Web 2.0 tools) required the team to focus on the "right" things to meet the business goals, instead of trying to adopt every new tool and technology that was fashionable or available
- With no strategic foundation in place, many systems with similar features and functions had accumulated across the organization without clear business purposes

The first step toward remedying these issues was to create an overarching strategy that could serve as a guiding force in the team's activities.

"To improve the situation, it was decided to mandate our team with the development of a new intranet strategy," says Gerhard Schauer, Web Strategy Manager.

As a first step, a detailed analysis was done, revealing the following strategic key gaps, identified as threats to the strategy:

- 20% of threats are governance related
- 14% of threats are relevancy related
- 10% of threats are info silo related
- 9% of threats are content organization related
- 8% of threats are missing feature related

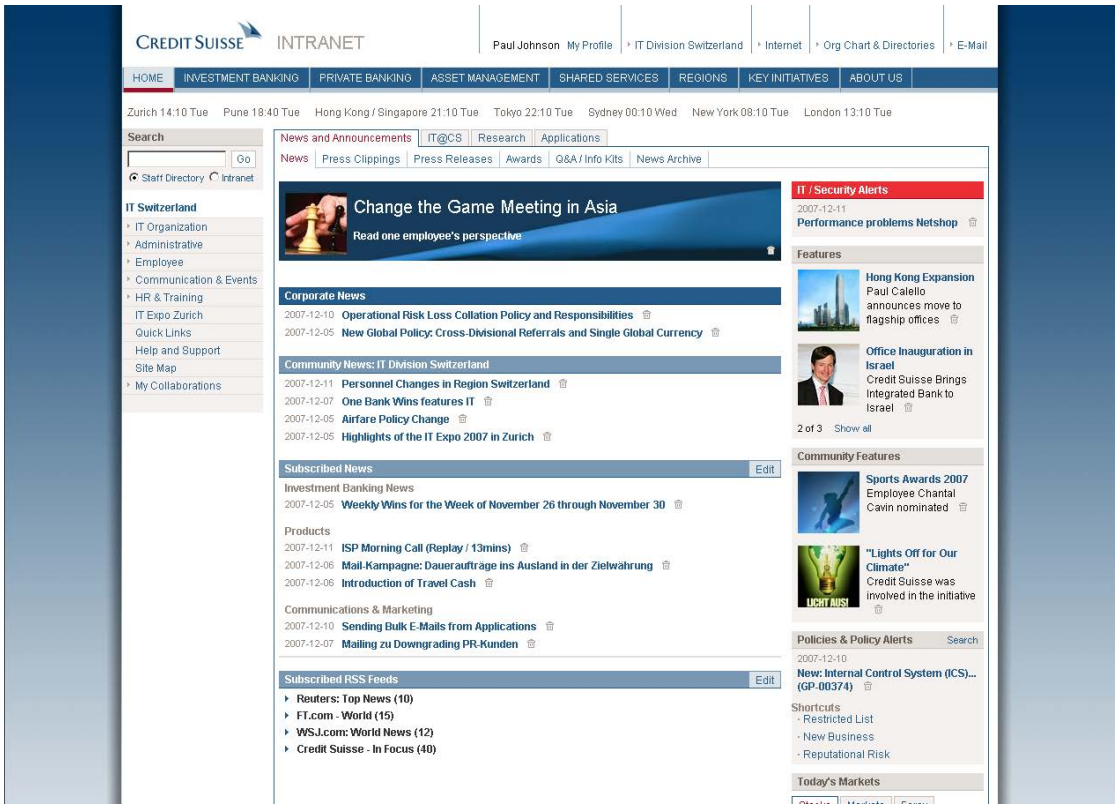
Therefore, they decided that the new intranet strategy should aim toward an integrated user experience with a centrally managed and news-driven communications approach, as well as across work-process-related content and services. Also, the intranet strategy should consider the following available intranet-based services:

- One-to-many messaging, especially the news distribution system
- One-to-one messaging services, such as email, voicemail, and instant messaging
- Directory services, including org charts and service directories
- Collaboration and knowledge-exchange services
- Webcast and video content services
- Support information and application-based information driven by core processes

To ensure a successful strategy development and acceptance of that strategy, the intranet team involved a broad stakeholder community in a comprehensive strategy-development process. The first set of workshops conducted with the group involved more than 50 key stakeholders. During these sessions, they defined the following key elements comprising the new strategy:

- **User needs** must be properly balanced with **business needs**.

- **The balance** between decentralized user control and centralized editorial control should be differentiated across three dimensions:
    - Access
    - Structure
    - Content
- **Governance processes** should define clear rules and controls. They must be transparent to message receivers (users) and message senders (providers).
- **Access**: Users should have considerable control around the content and services configuration of their new intranet.
- **Structure**: A well-defined and governed user guidance must be in place to enable that configuration process.
- **Content and services**: User-generated content is a reality to be considered; generally, work groups acknowledge that essential corporate and personal content and services must reside within an integrated intranet.



Pictured: A screen from the old intranet.

INTRANET TEAM



Pictured: The Credit Suisse intranet core team: (back row, left to right) Gerhard Schauer, Andrea Bargetzi, Oliver Staubli, Christopher Schmidt, and Stefan Büchi; (middle row, left to right) Christian Sebregondi, Peter Landolt, Andreas Zogg, and Isabel Herzog; (front row, left to right) Lukas Müller, Barbara Müry Erni, Mark Stefan Hirst, and Jamal Sadick; (inset, top to bottom) Linda Buschke and Aidan Bonel.

GOVERNANCE

Ownership

The Credit Suisse intranet portal is owned by Corporate Communications. To ensure strategic involvement from across the bank, a cross-divisional Web Governance Board determines the intranet's strategic direction.

"It is in the interest of several stakeholders internally to further advance the intranet and offer a state of the art platform to the end user in terms of content and local content structure," says Stefan Büchi. "Historically, the biggest stakeholder is Corporate Communications."

Channel ownership, solution ownership, and content ownership are split between teams. Content ownership is completely decentralized.

Team members in the roles of key account manager (KAM), Web strategy manager, and Web identity manager are in Corporate Communications. Project managers are part of Interactive Media Services, which rolls up to Corporate Finance. And seven members of the core team belong to the Corporate Communications department.

"With the introduction of the Web Governance Board, other stakeholders are now able to impact the strategy directly," says Büchi. "The goal is to evolve today's Intranet from a targeted communication channel into a company-wide collaboration environment."

"The shared ownership setup improved senior management's awareness," he says. "This had a positive impact on the project, since many different teams were engaged. On the other hand, the broad involvement resulted in a slower process, and more development time and costs. However, the consensus is that these additional costs ensure improved integration into existing IT landscape, as well as a higher quality, scalable, and maintainable infrastructure."

WEB GOVERNANCE MANDATE

The role of the Credit Suisse Web Governance Board is to act as a central body to develop and monitor the strategic direction of Credit Suisse's global Web presence across regions and divisions. The board is chaired by Corporate Communications, whose representative also chairs the Web Governance Board and is responsible to drive decisions.

The board's mandate is to serve the following functions:

- **Determine the future direction** of the Internet and intranet
- Determine and **regulate development** and technology standards
- Determine and **maintain content presentation** standards and overarching IA
- **Sponsor and prioritize** the corporate Internet and intranet project portfolio
- **Review progress** of key Internet and intranet initiatives and manage risks
- **Communicate decisions** to main stakeholders
- **Represent the Web Governance Board** in project steering boards
- **Coordinate and conciliate** between interests of involved parties
- **Identify and leverage synergies** across the corporate Web

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Corporate Design and Corporate Web	• Define comprehensive Web strategy, guidelines, and governance within Credit Suisse globally according to needs of external and internal clients • Define strategic roadmaps • Chair the global "Web Governance Board" and take primary responsibility for stakeholder management
Interactive Media Services	• Convert the strategy into business concepts • Manage the various projects that result from the strategic roadmaps • Act as the Business Sponsor of Web projects • Manage operational maintenance of Web applications
Community Managers	• Define the default content box setup for their own community • Consult the business in the usage of shared content features, such as allowing the news publishing system to reach any possible employee group; allowing the subsite system to represent units, project team sites, and small teams; and allow usage of services and applications directory • Define and publish *Community Links* based on the community's needs • Establish a community feedback system to ensure optimal content delivery
Content Owners	• Ensure that their content boxes, subsites, or team sites are up-to-date and consistent • Delegate some part of the updates or changes to other members of the team/department
Employees	• Customize their intranet according to their information needs • Manage their visibility on the intranet to ensure that they're reachable if their expertise is needed • Contribute and own content, and handle questions and answers about their content

USERS

All 49,200 Credit Suisse employees have access to news, policies, the employee directory, and self-service applications.

"The design of the intranet is primarily focused on our persona 'Daniel,'" says Schauer, "who is a process worker who spends about six percent of his time on the intranet."

"Through the use of the intranet, we expect that job profiles of Relationship Managers and other process workers will shift towards a knowledge worker profile," he says. "In IT and back office (*Shared Services*) area, we see a large majority of knowledge worker job profiles. This is why we have chosen the knowledge worker profile as another target group."

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://csintra.net/
Default Status	The intranet is set as each user's homepage and they cannot change that default setting. User are automatically recognized and logged into the portal via Public Key Infrastructure (PKI). The user's name is displayed in the intranet header area with a link to their personal profile page where users can change portal and content settings. The main content boxes displayed are defined based on the main community a user belongs to.
Remote Access	There are two ways to connect to the intranet via the corporate LAN: • A remote access solution that lets different users with company laptops access the corporate LAN. • myDesk, a Credit Suisse remote access solution designed to provide approved Credit Suisse employees' access to the Credit Suisse network via a non-Credit Suisse PC.

DESIGN PROCESS AND USABILITY WORK

Deciding What to Change

The project described here is one important implementation milestone in a long-term intranet strategy. This new intranet strategy was developed in 2007–2008.

Often, one of the challenges for an intranet redesign is deciding which parts to change. Because no project can address every shortcoming, it is often up the teams

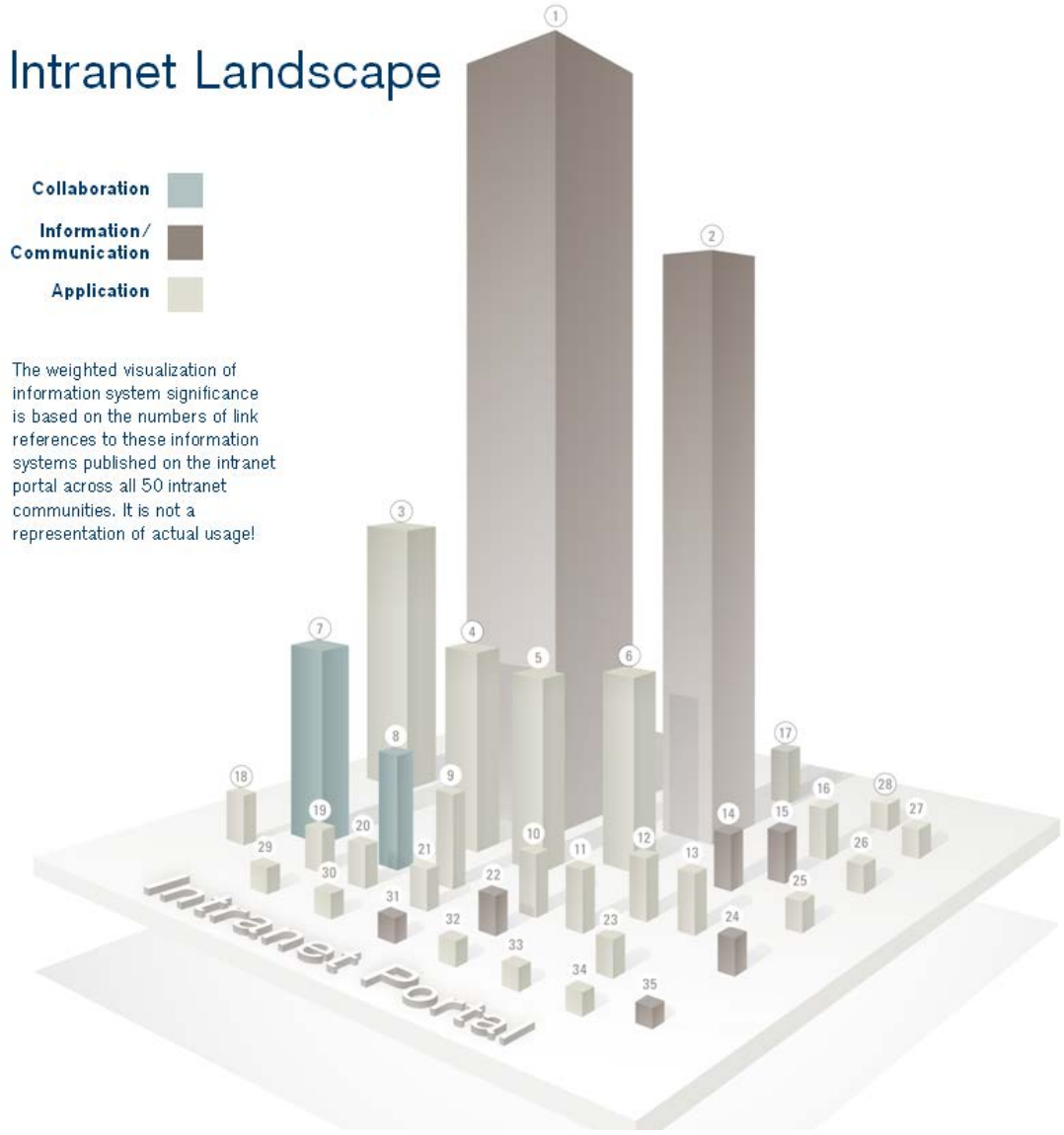
to devise methods to determine which intranet pieces require the most immediate attention and how to "fix" those components.

The Credit Suisse team conducted an in-depth strategy analysis on the existing intranet.

"Once the scope of the strategy development was clear (corporate-wide), we knew that we needed to carefully plan for a broad stakeholder involvement to be successful," says Schauer. "We chose to go for an explicit strategy development approach, which sought to evolve the new intranet strategy in collaboration with about 50 key stakeholders."

The strategic analysis consisted of four activities: "voice of customer" (VoC), "voice of business" (VoB), current intranet analysis, and best-practice analysis. These activities consisted of several steps each:

- **VoC:**
  - 21 half-day user observations
  - Third-party benchmarking survey (conducted in 2006 and 2008)
  - User and publisher behavior analytics of the old portal
  - "Concept Car" workshop to brainstorm solutions for the defined vision and goals
- **VoB:**
  - 21 key stakeholder interviews investigating the perception of current gaps and possible future options
  - Future Intranet Workshop to define vision and mission conducted with more than 40 key stakeholders
  - Workshops to define strategic direction and goals, and discuss options
  - Ongoing input from the organization's internal Web KAMs on various conceptual and strategic questions and decisions
  - Web Governance Board's review and approval of the new strategy and main concepts
- **Trend analysis:** Review of other intranets (bilateral exchanges with other large, multinational intranet teams) and participation in intranet interest groups
- **Current intranet:** Review the old intranet's structure to determine the importance of available intranet systems to the community



Picture: The intranet landscape map evaluated the significance of Web-based, internal information systems made available via the old intranet portal. The map helped the team define the new portal's initial information offering.

TIMELINE

INTRANET TIMELINE	
Milestone Date	**Milestone Description**
1997	First corporate intranet launched
1998	First news portal launched
2000–2001	First redesign
2004–2006	Second redesign
Late 2007	Beginning of strategy phase
July 2008	Roll-out of new intranet search center, providing guided navigation across multiple content areas
March 2009	Beginning of project phase for new portal
March 2010	Pilot roll-out to 2,000 IT employees
September 2010	Final roll-out to all employees

Challenges

The biggest challenge the Credit Suisse team had to tackle was the technical architecture — that is, how to make a modern design work in a highly customized and security-trimmed Internet Explorer (IE6) browser, and how to fit business requirements into an out-of-the-box portal with the inherent limitations this implies.

To accomplish this, the team had to think carefully about the project's goals, which were outlined as follows:

Strategic Goals

- Increase communication reach
- Establish reliable measurement of information system ROI
- Achieve efficient information and news distribution and targeting
- Leverage collective intelligence to improve information retrieval, organization, and lifecycle management
- Facilitate cultural change and move employees from passive consumption to active participation and sharing
- Introduce Web 2.0 principles as a foundation for self-regulated intranet processes

PROJECT-LEVEL GOALS FOR THE INTRANET REDESIGN	
Project Area	**Goals**
Credit Suisse Portal	• Standardize how users can aggregate and access content and applications • Establish one trusted "advertising and distribution" system for content and application promotion • Leverage user profile data for more personalized content and service targeting
Search Center	• Leverage usage, meta information, and user roles to improve search ranking • Allow users to find relevant content by browsing multiple navigation paths • Leverage collective content usage to improve individual access to relevant content
Content Management	• Let users/readers always know who is "talking" to them • Greatly reduce outdated content and broken links • Simplify content management to enable editors of all levels to handle the process
Collaboration	• Enable instant sharing of any information resources within virtual teams • Increase efficiency in virtual meeting organization and decrease need for physical meetings • Improve meeting experience
Social Media	• Ensure experts and peers are easy to find • Let employees become contributors, sharing their knowledge/information with a firm-wide audience • Engage employees in opinion sharing and critical thinking



Pictured: The site's hybrid navigation concept with blue organizational navigation and tabbed topical navigation. This model gives users access to content via topics and search, but also enables organizational ownership of content.

Working with Agencies

Credit Suisse employed agencies both to get an outside view of the project and to get expertise to augment the internal team's capabilities. The agencies worked in close collaboration with the core team, with some of the time spent in collaborative work sessions. This close relationship with the agency teams and the Credit Suisse team meant communication could flow easily between them.

"This way, immediate feedback was possible whenever the designers did have questions, and we were able to challenge their designs regularly," says Andreas Zogg, Head Web Identity.

And, by using a design agency that had worked on the company's public website, the intranet benefited from the agency's institutional knowledge of the company's design priorities.

"We used the same creative design agency for intranet and Internet design to ensure the intranet design solutions are inline with the corporate online design," Zogg says.

The following agencies were involved in the redesign project:

- **Noise AG** was responsible for the visual design work. Although the Credit Suisse corporate design standards were applied to the intranet design, Noise AG also developed many new design elements to meet best practice standards.
- **Stimmt AG** served as intranet strategy consultant during the strategic analysis and discovery phase. They conducted the user observations and "Concept Car" workshop. They also delivered first drafts of the IA, along with wireframe prototypes.

Usability Activities

The intranet team conducted a series of usability-related activities during the redesign. They selected these research methods based on findings from the project's initial analysis phase.

The mix of activities was also somewhat dictated by the project's needs. The project was aimed at changing the site's interactive behavior and design (but not the structure), so the team wanted at least two or three usability lab iterations. This was especially important because users explicitly asked for more customization choices — and particularly wanted to be able to move or remove content they didn't need. This finding was somewhat surprising to the team.

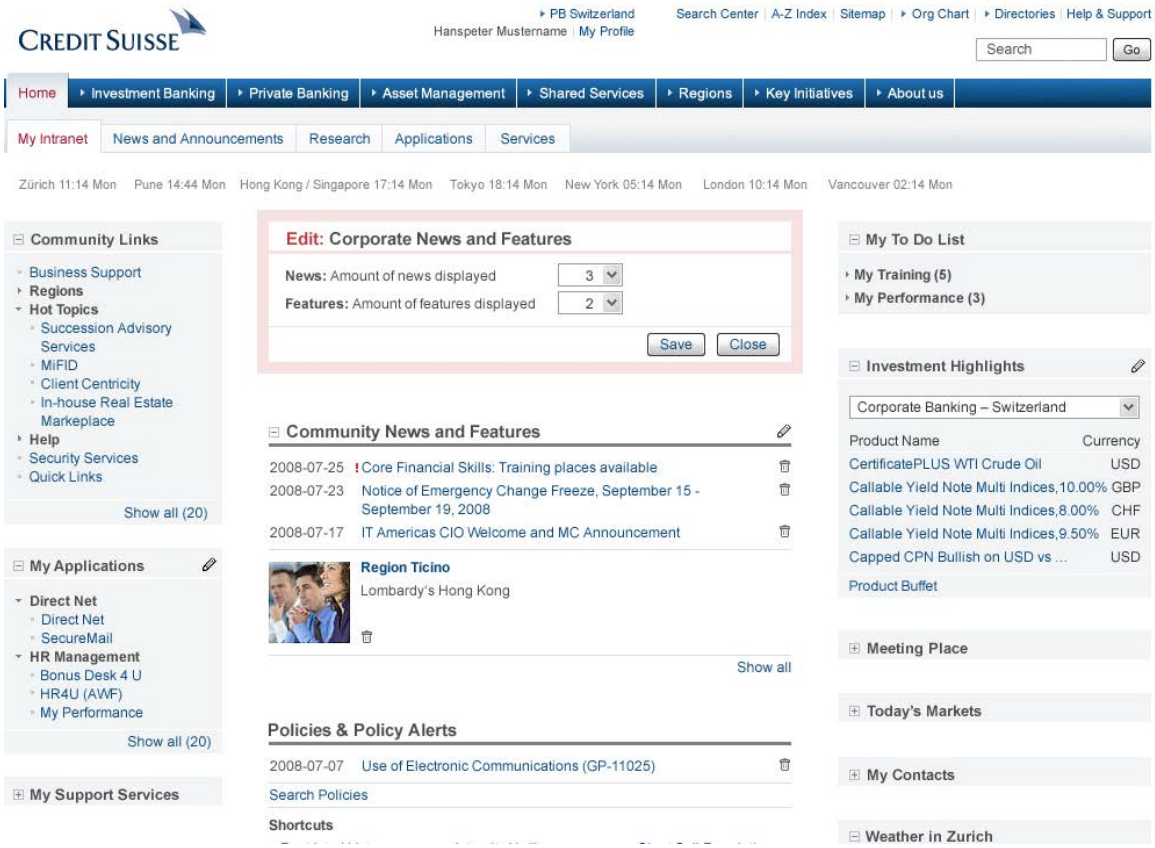
"The opinion within our team was that employees would not want customization features," says Isabel Herzog, Web Identity. "The IA was perceived as okay."

So, in order to properly design for this customization functionality, the team delivered approximately eight design iterations.

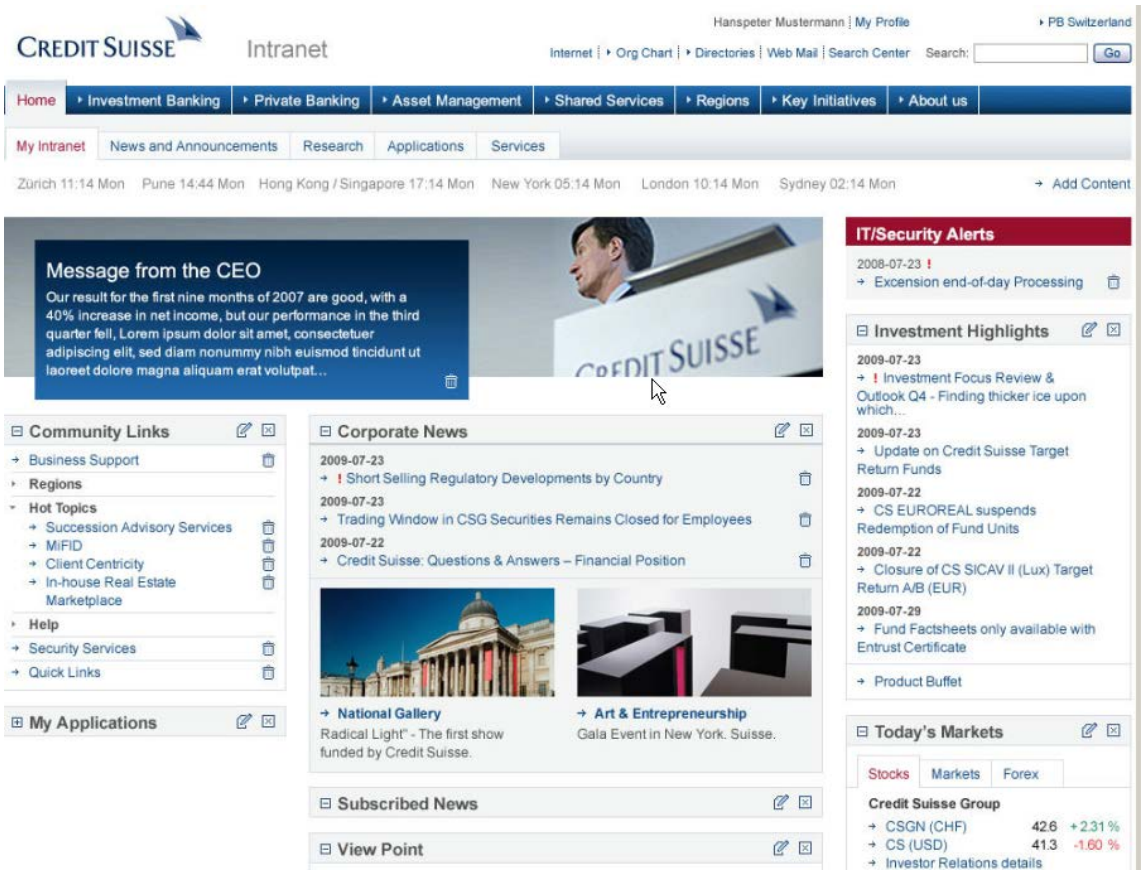
"We did this to come up with a design that supported the customization to its full extent, but still allowed us to set some visual hierarchy," says Isabel Herzog. "We tried out different grids and different organizational and meta information navigation systems."

The design process made clear that the design solution should encourage users to play around with the content boxes.

“Users should have the freedom of arranging their content,” says Herzog. “The design has to support the customization features. A neutral design of the content boxes supports this idea best. This would allow any grouping of content boxes without visual interference.”



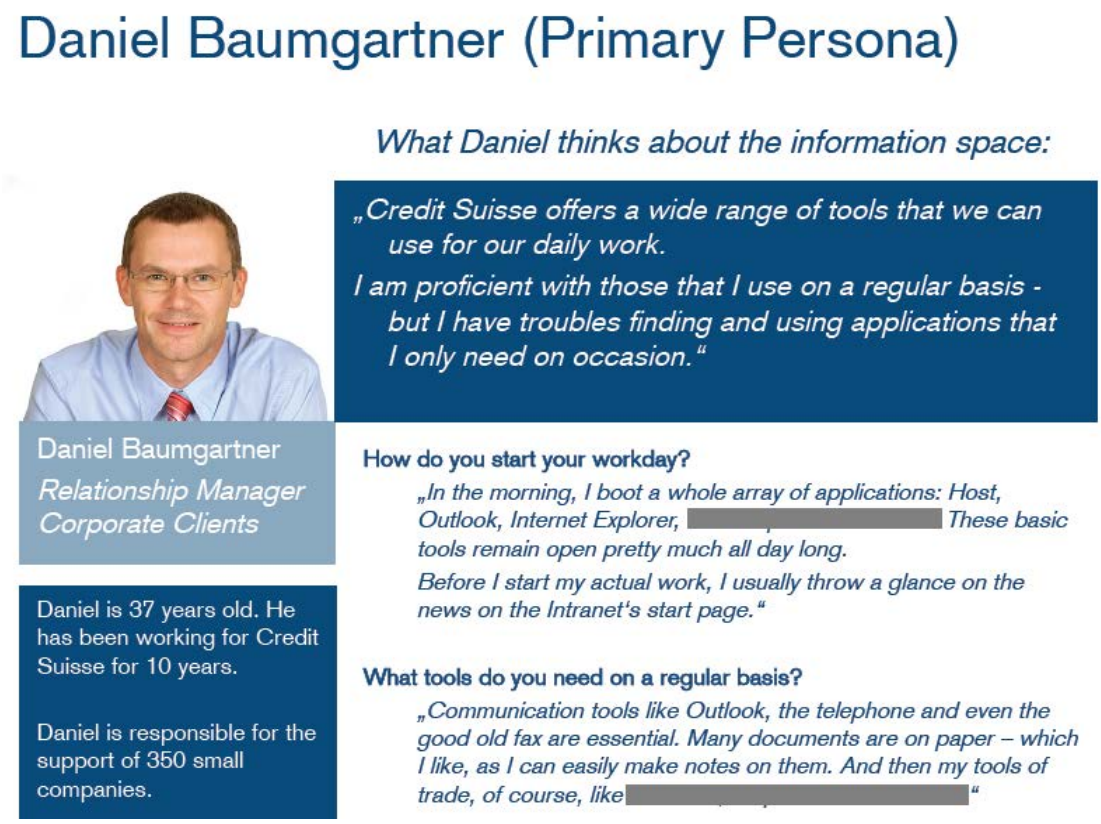
Pictured: This screen shows one of two intermediary steps in the new portal’s design evolution. The design evolved from this to design to the one shown in the screen below.



Pictured: An intermediary step in the design process.

To achieve the required usability level, the team conducted a variety of research methods throughout the project, including:

- **Card sorting:** Card-sorting exercises were conducted to facilitate the high-level clustering of content areas. Card sorting was also used successfully for the services directory.
- **Checking server logs or usage stats:** Log files from the old portal were analyzed so that the team could better understand current usage during the "current situation" analysis at the beginning of the strategy phase.
- **Field studies:** The team conducted a field observation with 21 employees for a half day each. During these sessions, employees were observed in activities related to information retrieval and consumption behavior on the intranet. Personas were developed from the results of these observation sessions.

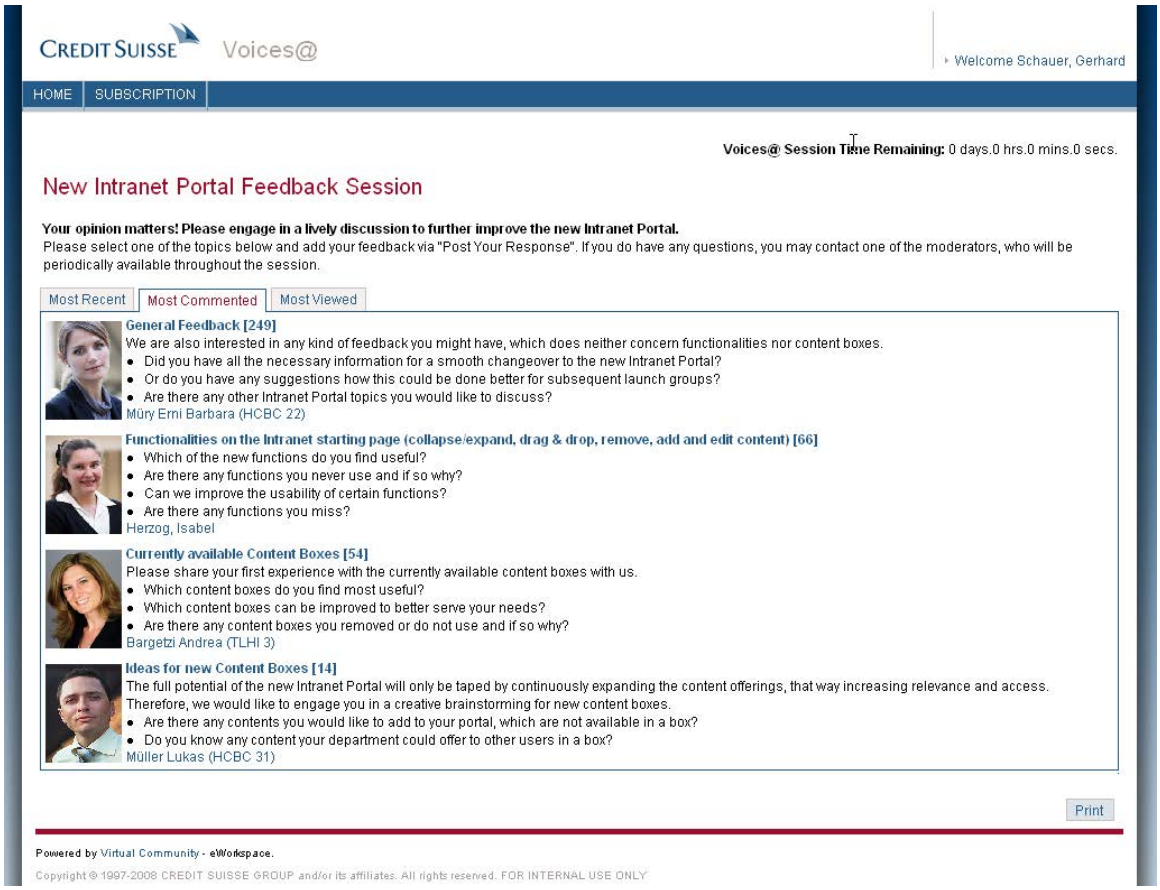


Picture: User-centered development during the strategy phase helped the team focus on real needs. This screen shows the primary persona that was developed to support the project.

- **Expert reviews:** The company's internal Customer Experience Team supported the intranet team in conducting the usability testing sessions and gave them expert reviews for each major design/development step.
- **Meeting with other companies' intranet teams:** The Credit Suisse intranet team leveraged the experience of other large companies implementing similar intranet strategies on the same technical platforms. During these exchanges, the Credit Suisse learned one important thing, according to Schauer: "Don't allow content to be published for free on the portal, as this will lead to an inflation of content, making it impossible for employees to efficiently aggregate content. Ensuring that the right amount of content items are provided in the content store is crucial for the success of this model."
- **Surveys**: On a quarterly basis, the company participates in the *Intranet Satisfaction Survey* in collaboration with the University of Basel. (More information on this survey can be found at http://www.intranetsatisfaction.com.)
- **Usability testing of design prototypes:** Two usability tests were conducted. The first one was based on design mockups and was conducted with five participants. The second usability test was conducted using a semi-functional prototype that had the final design's look and feel. Tests were also conducted in New York, Zurich, and Hong Kong with 28 users. The goal was to understand how users perceived the visual appearance, content relevancy,

content amount and structure, usability and usefulness of customization functions, and overall findability of content.

- **Viewing other companies' intranets:** Credit Suisse team members participate in several different national and international intranet interest and knowledge-exchange groups. Through this participation, they have had the opportunity to see many other intranet portals and speak with the teams behind these projects.



Pictured: One of the open, moderated discussion forums. This particular forum let users collect feedback and get instant answers during a one-week session about the new intranet portal.

Learning from the Results

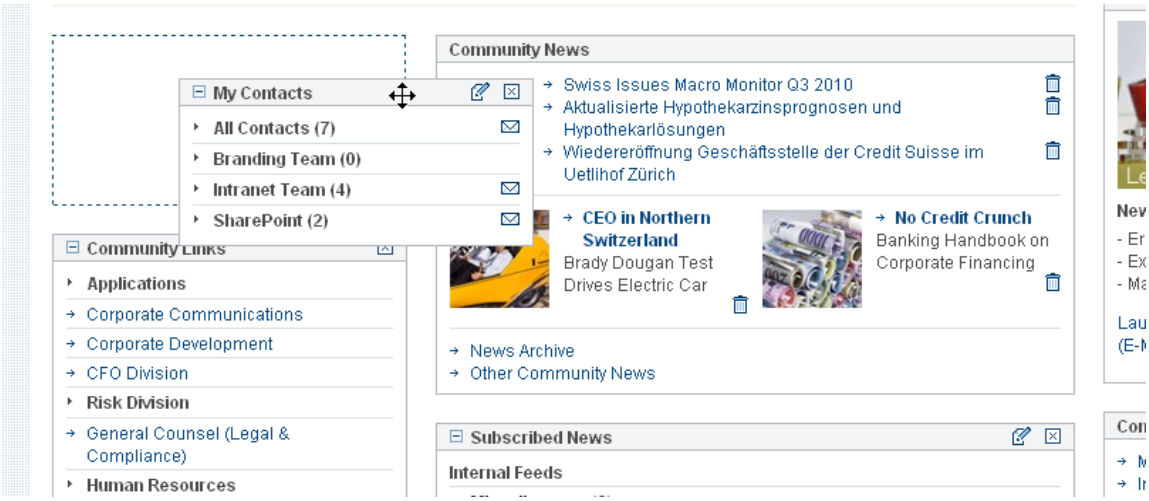
A couple of things became clear through testing. First, there was a fundamental gap between a power user group and a novice user group.

"Power users instantly started arranging the intranet, since they were likely familiar with the drag-and-drop functionality from external sites," says Herzog.

Novice users required "a lot" of time (up to five minutes) to see the customization possibilities, and Herzog says some would not have found them at all without subtle intervention of the tester.

"Once they realized that they are allowed to arrange their intranet on their own, they where all very fascinated about this and started to optimize the layout and content according to their needs," she says.

"The key learning for us was to ensure we would flatten the learning curve for novice users. We then decided to achieve this with two avatars explaining the key customization features to all employees receiving the new portal," said Barbara Müry, Web Strategy Manager.



Pictured: Drag and drop is one of the site's most powerful features, letting users easily and intuitively reorder information on the screen.

From the card-sorting exercises, the team learned that that they wouldn't be able to improve user satisfaction dramatically (for most users) simply through the high-level IA.

"By changing the high-level IA, we would even risk that users would not be able to make informed customization decisions," says Schauer, "as they would have to first learn what the new arranged content areas and content items actually mean. This would be a major risk for the whole redesign."

Instead, the team felt it could accomplish its goals much better by allowing employees to customize the portal based on their likes and dislikes.
And, through user observation sessions, the team saw consistent patterns across the observed process workers, leading them to conclude that they'd only need to accommodate one persona to develop an access strategy for the site.

"Process workers do not need application integration to the intranet," says Schauer, adding that process workers know three information worlds:

1. **The world of processes working, where they're highly professional expert users.** They can manage up to eight open tools in parallel. They know where to find information instantly, as long as it's stored within their core systems. They have issues in working efficiently due to lack of data integration among their core tools. However, data and process integration is outside the scope of the intranet redesign mandate.
2. **The world of making decisions to move processes ahead.** This is where employees require additional information, including information about the market, policies they need to comply with, and where to find expert support.
3. **The world of seldom-used support processes.**

"For worlds two and three, employees are dependent on good information access, retrieval, and memorization support," he says. "They spend six percent of their

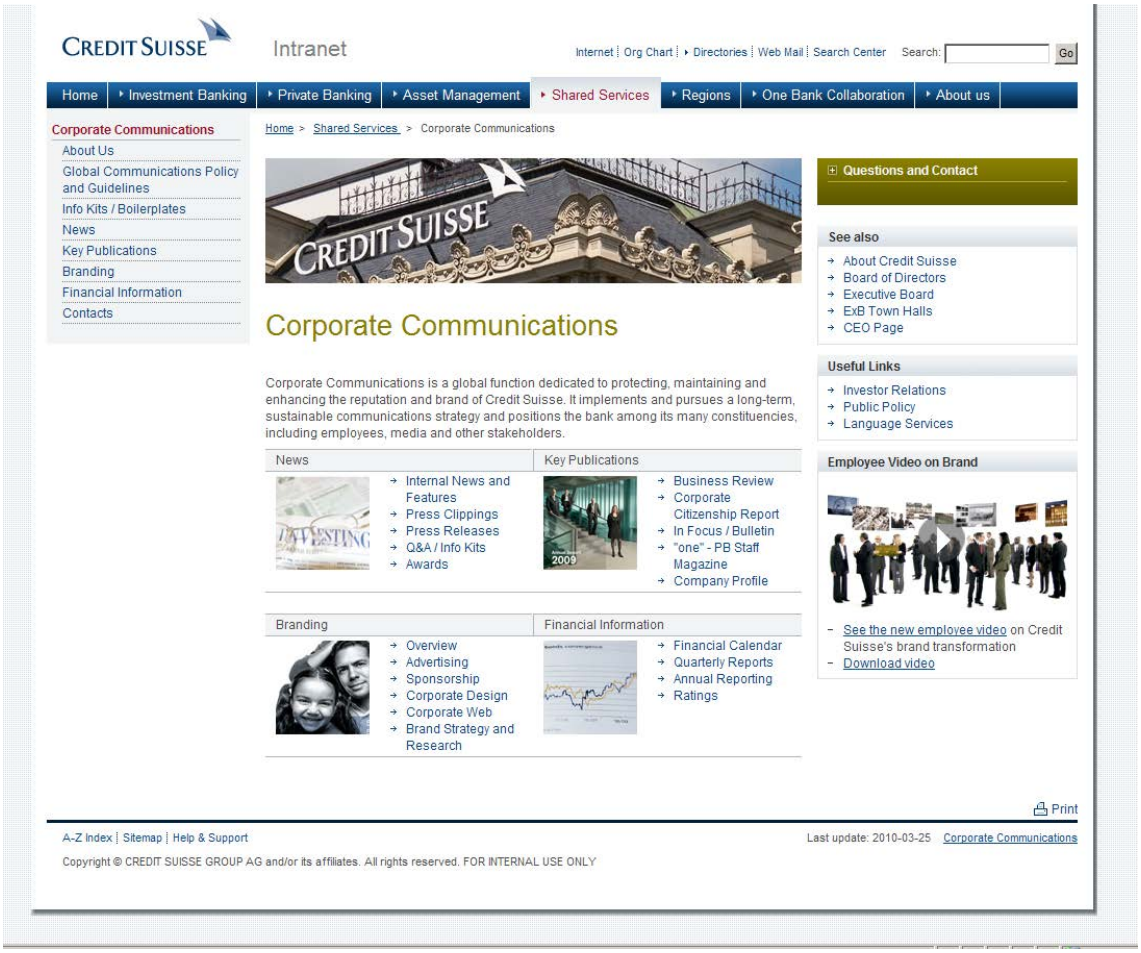
time in worlds two and three — but that six percent of the time is important to be able to work efficiently in their core working processes."

CONTENT AND CONTENT CONTRIBUTORS

Content Management

Three content manage systems govern the intranet content. Andrea Bargetzi, Intranet Program and Project Manager, explains these systems and what they control:

- **Interwoven TeamSite** for official team or department subsites. This system allows high-level control of the corporate design. The WYSIWYG editor controls many design rules. The system is very scalable and robust from a technical viewpoint and allows high-level control of site states (an audit requirement). There are more than 600 active publishers on the Interwoven system.
- **SharePoint** for collaborative project, meeting, or knowledge group team sites. Ease of setup and office integration was the main criteria in choosing SharePoint for this purpose. More than 10,000 users contribute content via SharePoint.
- **News publishing system** (internal, custom application) for the distributing official news to any target group within the bank. This custom system allows any granularity of rule-based targeting according to any attribute in an employee's *MyPage* profile, including division, region, rank, and so on. More than 200 users produce content through the news publishing system.



Pictured: An example of a department-level page, where large business units provide detailed information about business function strategies and processes, along with process-related information.

Decentralized Authoring

Credit Suisse has a completely decentralized content publishing model in place. There are three content systems available for employees to chose from depending on their business needs. The company's three KAMs can setup rights for any employee within the bank. These managers also provide strategic guidance for website publishers during the site setup process. The KAMs consult with publishers on how to set up their sites, conceptually, and how to ensure they can be found. The KAMs also coordinate the accurate organizational and topical placement of new subsites.

No central team reviews the content these users publish.

"The publishing process enforces a "four eye" principle for content published to subsites on Interwoven," says Lukas Müller, KAM. "This process means at least two different employees have to approve content before it can go-live. A staging environment is provided, which allows quality control and approvals before publishing to the live site."

Ensuring compliance is built right into the content publishing systems. The Interwoven and news publishing systems provide templates that ensure design

compliance with the company's corporate design guidelines and standards; the SharePoint system has also been adapted to the corporate design.

Supporting Content Publishers

Training for content contributors is provided through a variety of distributed Web-based learning tools, which help them learn how to properly use the system. These include: video and voice recordings, a comprehensive guidelines manual, single page quickguides, and an up-to-date FAQ. This approach of providing self-service learning tools provides a cost-effective alternative to centralized training. And to further support the site's content publishers, a specific focus of the redesign effort was to improve the WYSIWYG editor's usability.

The system addresses "dead content" and "dead links" through an automated monitoring system that spiders all the intranet pages for broken links, SEO, and accessibility rules, and generates reports about these issues.

"Additionally," says Müller, "the KAMs advise content owners about the ecosystem of the intranet sites, and their relation to the search results."

Each page also shows a content owner, which makes it much easier for users to reach the responsible teams as needed.

TECHNOLOGY

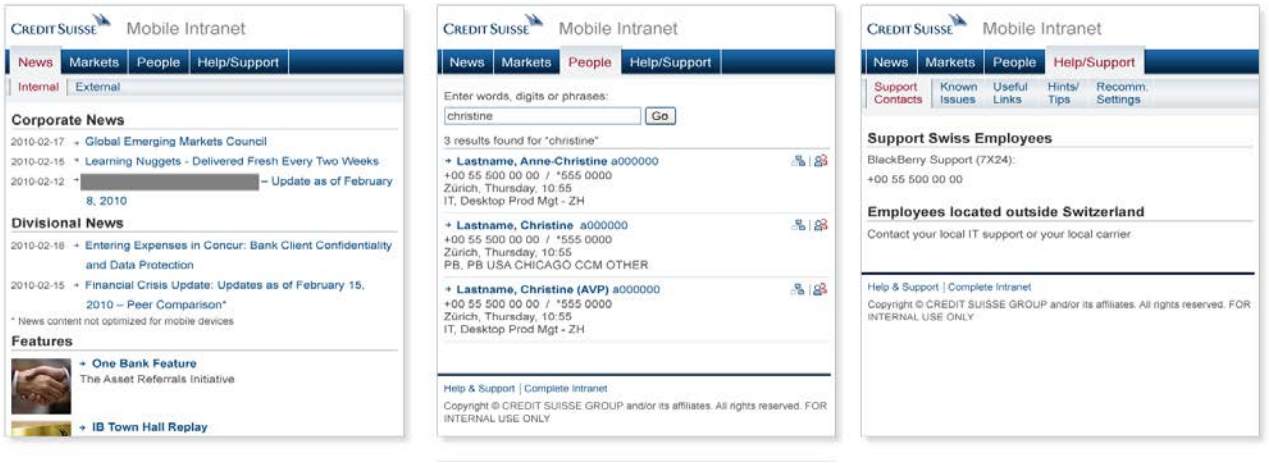
TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and O/S	• BEA WebLogic plus Oracle stack
Bug Tracking/Quality Assurance	• Quality Center
Design Tools	• Adobe PhotoShop for visual design
Content Management Tools	• Interwoven TeamSite • Xopus Editor • SharePoint • In-house custom news publishing system
Search	• Google • Endeca
Other Technology	• BEA portal server for the new portal

MOBILE

Mobile access to the intranet is provided through a version optimized for the Blackberry model used by Credit Suisse employees. Providing access to this group of users was not a nice-to-have feature, it was, says Peter Landolt, "necessary to ensure acceptance by this target group." This group is comprised of middle and senior management throughout the company.

The intranet features available on Blackberry include:

- News (internal and external)
- Support contacts
- Market news (including stocks, Forex, and markets)
- Employee directory with organization chart (which was included because of an explicit request from senior management)



Pictured: Mobile intranet screens on a Blackberry device. These pages are targeted at senior management.

SEARCH

Although search functionality wasn't re-evaluated during this redesign project, there is currently a separate, ongoing project underway to evaluate the best platform for the company's needs.

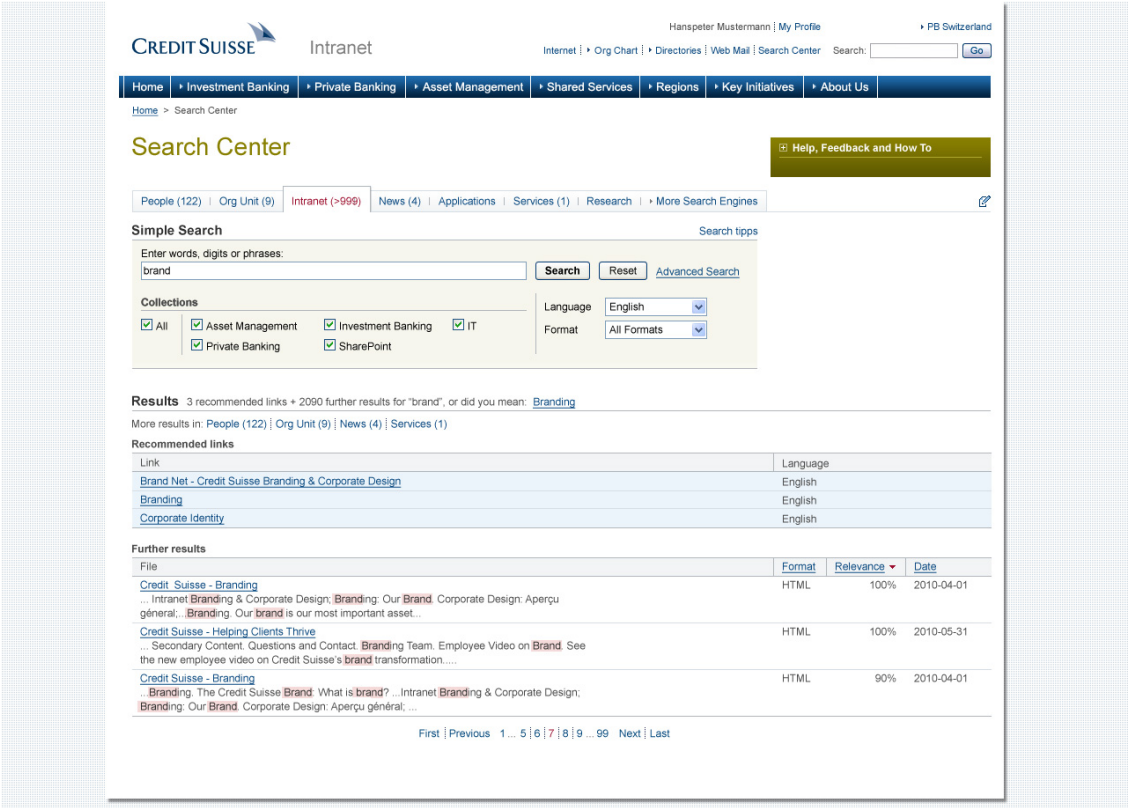
Search works by combining the platform's most important search engines into a single place. Each search area has its own tab and the entire search contains a total of nine tabs (search areas).

After entering a search term, users get search results in their predefined default tab, but a search query is automatically executed for all available tabs. Each tab shows the number of search results found in that specific tab. Users can directly access a specific tab and refine the listed search results by different categories (such as date, unit, and relevance) on most topical search tabs.

The default search results view is customizable by users. They can select which search category areas are most important to them and where to position each area within the center tab navigation.

The first tab is the default tab. All search queries from the quick search box go there by default. The labels are the main search areas in the intranet search. Collections are the sub areas of a specific search area. Recommended links are manually maintained via an administrative tool.

"The main idea," says Schmidt, "is to promote specific topics more prominent in the search results — the same concept as ad words on google.com."



Pictured: The Credit Suisse intranet search combines the most important search engines in one place, letting users go to one central place to search across multiple information stores.

RESULTS AND ROI

Measuring an intranet project's success or impact is often a case of choosing a measurement strategy related to qualitative measures. That was the case for Credit Suisse, which wasn't trying to achieve hard numbers in terms of infrastructure savings or affect the business process directly, but rather was trying to move the needle in terms of user satisfaction.

"Hard ROI numbers are unfortunately not possible to count, as we did not change the business process directly," says Schauer. "We also did not aim to achieve infrastructure savings. The measurement of our goals is only possible through qualitative research."

So, one way of providing some measurement was to gauge user satisfaction with the intranet overall as well as with new features. To do this, the team conducted quarterly surveys.

"The results provide important input regarding short- to mid-term project and program management," says Müry. "On a bi-yearly basis, we conduct an extensive benchmarking survey including our key competitors. This benchmark provides valuable information to optimize our strategic direction. For the time being, we do not have any results available yet."

Users who participated in the beta launch provided feedback via the public discussion boards, without any prompting from the intranet team.

"We believe this is a success," says Müry. "We received twice as much positive general comments than negative comments with respect to the user's satisfaction."

The good will of the users is not the only testament to the success of the redesign efforts. Feedback from members of the company's top management has been very positive.

LESSONS LEARNED

Credit Suisse team members share some lessons learned from the project:

- **Trust users with choices.** "There is no reason to fear that users will move 'must know' content away from the top positions in the layout, even if they are given flexibility to arrange content blocks themselves. They will choose to keep corporate and community in balance." (Bargetzi)
- **Seek broad stakeholder involvement.** "Stakeholder involvement is key to being successful with a portal that should be rolled-out for all employees. Also important is a well-defined escalation path to the senior management with decision makers sitting in the senior management supporting the basic strategic direction." (Büchi)
- **Involve IT in the strategy.** "IT involvement in the strategy has proven very helpful. This way, it was possible to ensure IT enough time to align their strategies, and business was able to get feedback about feasibility of conceptual ideas early in the process, before IT specifications have been written." (Schauer)
- **Estimate resources carefully.** "Ensure enough time and resources are planned for design work. A project plan with four weeks implementation time and four day's design time will not work. Design work takes as much time as development work and must be done before IT specification starts." (Zogg)
- **Use a cocktail of usability methods.** "The combination of different usability methods and the involvement of a couple of outside agencies and various internal units to provide an outside view to the project have proven very efficient in coming up with a well accepted solution." (Herzog)

American International Group, Inc. (AIG)

Using the intranet: American International Group, Inc., (AIG) is a leading international insurance organization serving customers in more than 130 countries. AIG companies serve commercial, institutional, and individual customers providing property-casualty and life insurance and retirement services.

Headquarters: New York, NY

Number of employees the intranet supports: Approximately 35,000

Company locations: 130 countries

Locations where users use the intranet: Americas, Europe, Singapore, Hong Kong, Philippines, Australia, China, New Zealand, Vietnam, Papua New Guinea, and Japan

Annual sales: $17.8 billion (2011)

Design team:
The core team designed the look and feel, IA, and overall user experience and is responsible for ongoing support. A partner agency offers project-specific support.

Team members:
Victor Aviles, Keerthy Raghuveer, Frank Williams, Bryce Lee, Huy Lim, Jechul Wee, Pinkal Gandhi, Brian Kirby, Lawrence Yee, Marie Villanueva, Richie Block, and Sean Ryan

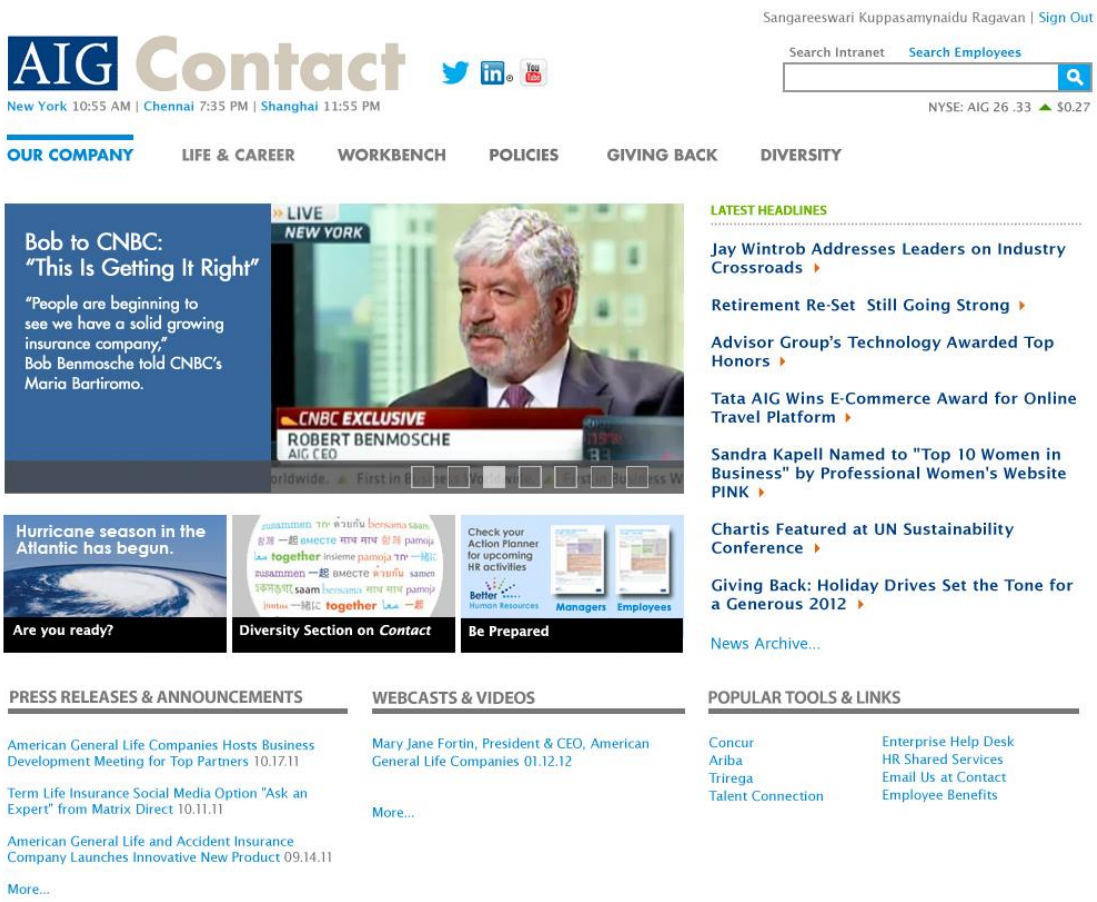
SUMMARY

The American International Group, Inc., (AIG) intranet, named *Contact*, provides a forum for both corporate information and material from various regions. This creates a harmonious, unique gathering among companies under the parent organization.

The homepage immediately brings employees up to speed on current corporate happenings and news through various supporting features, including a list of the most current internal news items—which are pulled in as a feed based on content tagging—and a link to the *News Archive.* Another section displays links for press releases and announcements, while yet another section links to webcasts and videos. The presence of these links on the homepage makes all employees aware of the features and—more importantly—reminds employees to consult them periodically. The organization promotes particular topics in a few ways, the first being the main content area's carousel, which rotates through recent feature stories. The homepage also hosts "feature blocks" below the carousel, which include assistance-related content and advertising for intranet features.

To keep up on what people are saying about AIG and its products on social networking sites, users need to click no further than the icons linking to AIG channels for Twitter, LinkedIn, and YouTube, in the top center of the page. Although users can certainly get easy access to these sites via their bookmarks, the links are a nice reminder, provide speedy access, and demonstrate support for the representation on social sites.

People can quickly see what time it is for many of their colleagues, as the current local time for three prominent AIG offices—New York, Chennai, and Shanghai—displays just below the logo in the upper left. And the current stock price appears in the upper right.



Pictured: The homepage for Contact, AIG's intranet, is like having a corporate newscaster sitting nearby, keeping employees apprised of news, announcements, webcasts and videos, and press releases.

Clicking a news link in the carousel opens the related article, which displays the article along with a way-finding cue: the same image that appeared on the homepage, resized appropriately. This immediately confirms to users that they are on the page they wanted, which boosts confidence. The new articles live in the *Our Company* section's *News & Media* area, which can be easily deciphered in the navigation. The *Our Company* tier-one menu item changes from grey to blue when selected, and a blue bar appears above it. Within the second tier navigation, the *News & Media* link also turns from grey to blue so it's easy to tell which is selected. Users can access the news archive via the *Back to News Archive* link within the article itself.

Because content meta-tagging was implemented for all news items, articles can be pulled into appropriate feeds. In the case of the homepage, news that affects the whole organization appears here, and local news is pulled into the appropriate departmental main page. If an article relates to more than one area, it can be tagged so it will appear in multiples areas.

Sign In

AIG Contact

New York 12:58 AM | Chennai 10:28 AM | Shanghai 12:58 PM

Search Intranet Search Employees

Search

NYSE: AIG 34.49 ▲ $0.69

OUR COMPANY LIFE & CAREER WORKBENCH POLICIES GIVING BACK DIVERSITY

Back to News Archive



Architectural drawing of a proposed workstation in new offices.

Workspace Strategy: Innovative, Environmentally Friendly, Cost Effective

04.16. 2012

The workplace of the future is taking shape at AIG offices around the world. From London to Tokyo, the company is creating more dynamic and interactive workspaces, and reducing operating expenses.

Now, AIG's offices in New York City are following this lead. To that end, the Corporate Real Estate Group brought together a Workspace Strategy Committee representing each area of the organization. Based on its analysis, the committee determined that New York office space can be used more economically and reflect today's working styles.

The group proposed a plan, in line with other company locations that have been renovated, which introduces a more modern workplace, a consistent standard for the ratio of offices to workstations, increased collaborative and meeting spaces, and enhanced wireless technology. As a result, the company expects to create more comfortable and open workspaces on renovated floors, and reduce its environmental impact, while saving money.

"This strategy will enable AIG to consolidate its New York offices into 175 Water Street and 80 Pine Street," explains AIG Chief Administrative Officer Mike Cowan. "We will soon begin to reorganize and renovate space to the new standard. Over the next year, we will transition out of 180 Maiden Lane and 1 New York Plaza—which will result in over $50 million in savings a year. These efforts support our broader drive to cut AIG's operating expenses by over $1 billion."

In the renovated workspaces:

- Workstations will be arranged by windows, so more employees will have access to daylight and views.
- Individual offices will be situated internally and allocated by job grade.
- A better technology infrastructure will include enhanced wireless connectivity and new conferencing systems.
- Floors will offer more meeting areas, to support both formal meetings and spontaneous collaboration.
- Offices will have partially frosted glass walls, which will maximize natural lighting to create a more open and bright environment.
- Pantries will be more inviting, with seating areas.

"These changes," says Jeff Hurd, AIG Senior Vice President, Human Resources and Communications, "will result in a work environment that promotes greater collaboration between employees. What's more, where it makes sense, managers and employees may also want to consider ways to get work done outside of traditional office space by making the most of flexible work arrangements."

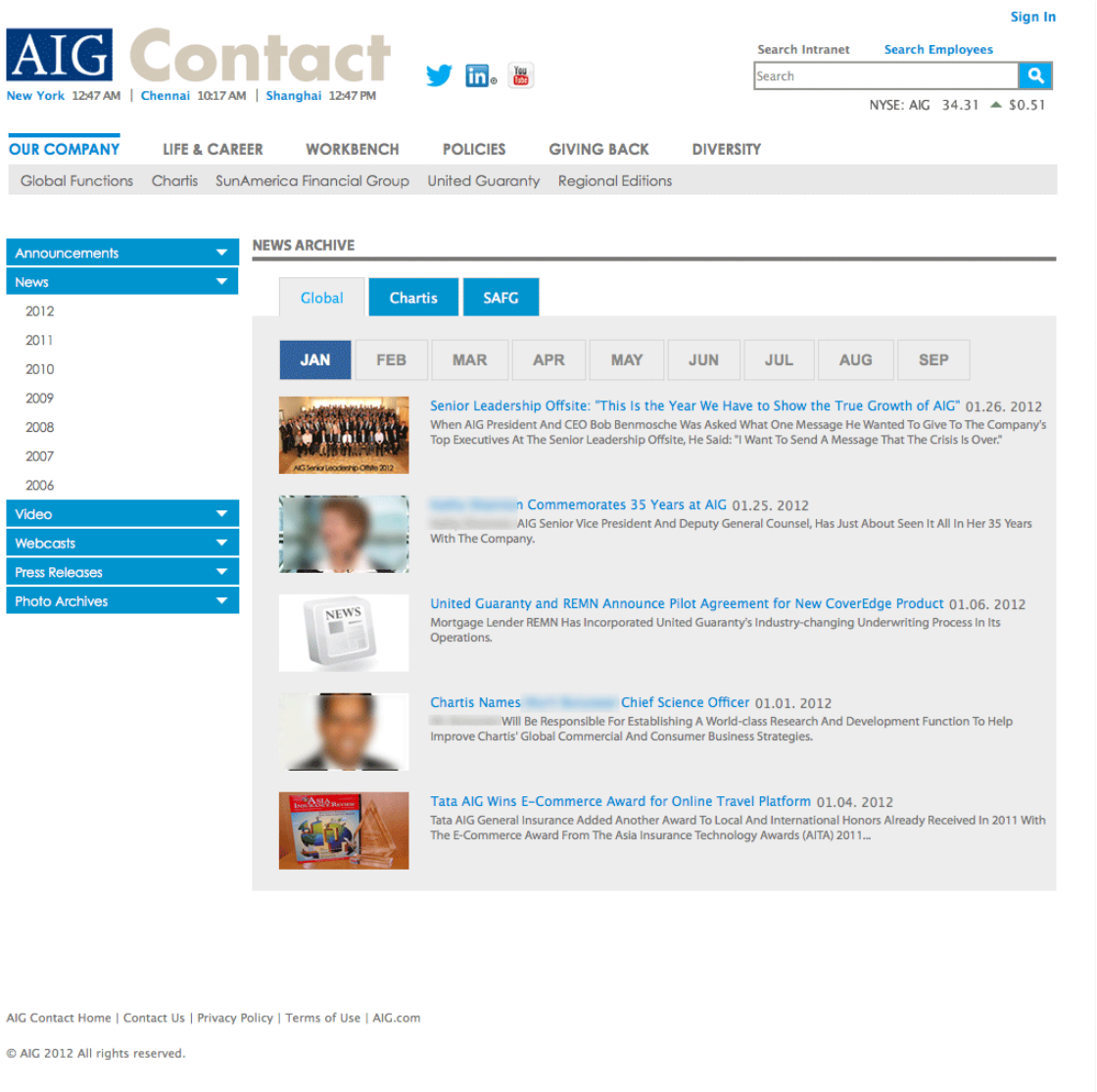
A model of the new workspaces recently received high marks from individuals within New York business units. Over the next several weeks, construction will begin on the first phases of the new workspaces to make these plans a reality in New York.

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Pictured: Clicking a headline in the homepage carousel opens the related news article, which includes the same image that appeared on the homepage.

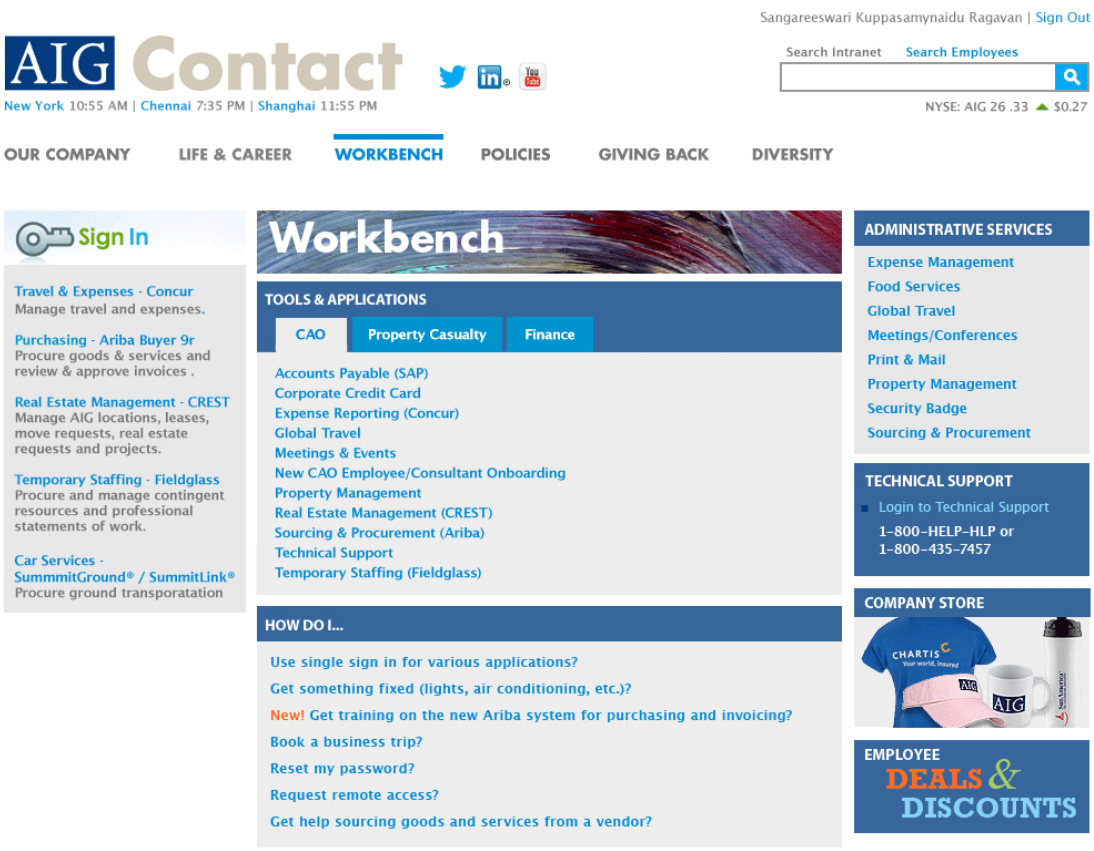
Knowing the importance of referencing past news items, designers provide the news archive and make it easy to stride through it using the filters on the left to select type, year, and month. When news is created, it is assigned a metadata marker, so companies at AIG can filter it in the archive. Clicking one of the tabs at the top in the archive filters the articles; the default selection, *Global*, includes all news from all major AIG companies.



Pictured: Articles in the news archive can be sorted by type, source, year, and month.

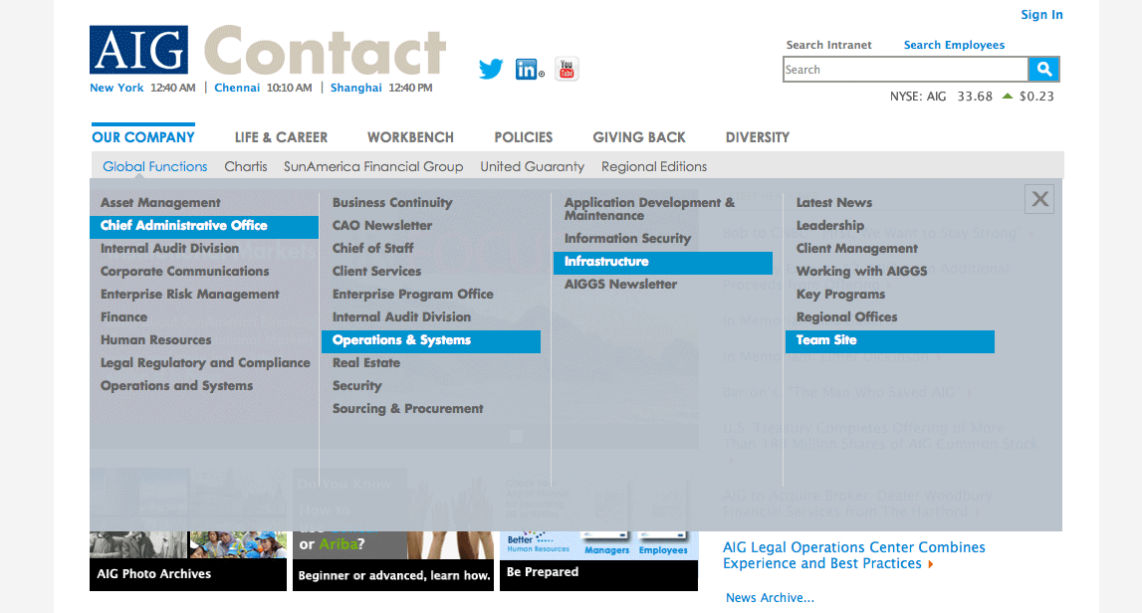
AIG designers are in the process of fully implementing single sign-on because they understand the value of pre-populating content for users and not forcing them to remember multiple passwords. Employees will soon be able to log in to their computers and automatically be authenticated in Contact and most other applications. Currently, logging in to Contact passes the employee's login information through to the applications most people use. These are consolidated in the intranet's *Workbench* section. The *Tools & Applications* area offers links to various items people need, including technical support, meetings and events, office supplies, travel arrangements, expense reports, and temporary staff. The *How Do I...* section presents common questions and answers in plain, helpful language.

Additionally, the phone number for technical support appears in the right rail, so users who need help don't have to click or search any further to start solving their problems. Links to the most popular areas appear at the top of the right rail, making them very easy to get to.



Pictured: The *Workbench* area consolidates tools to help employees complete various work-related tasks.

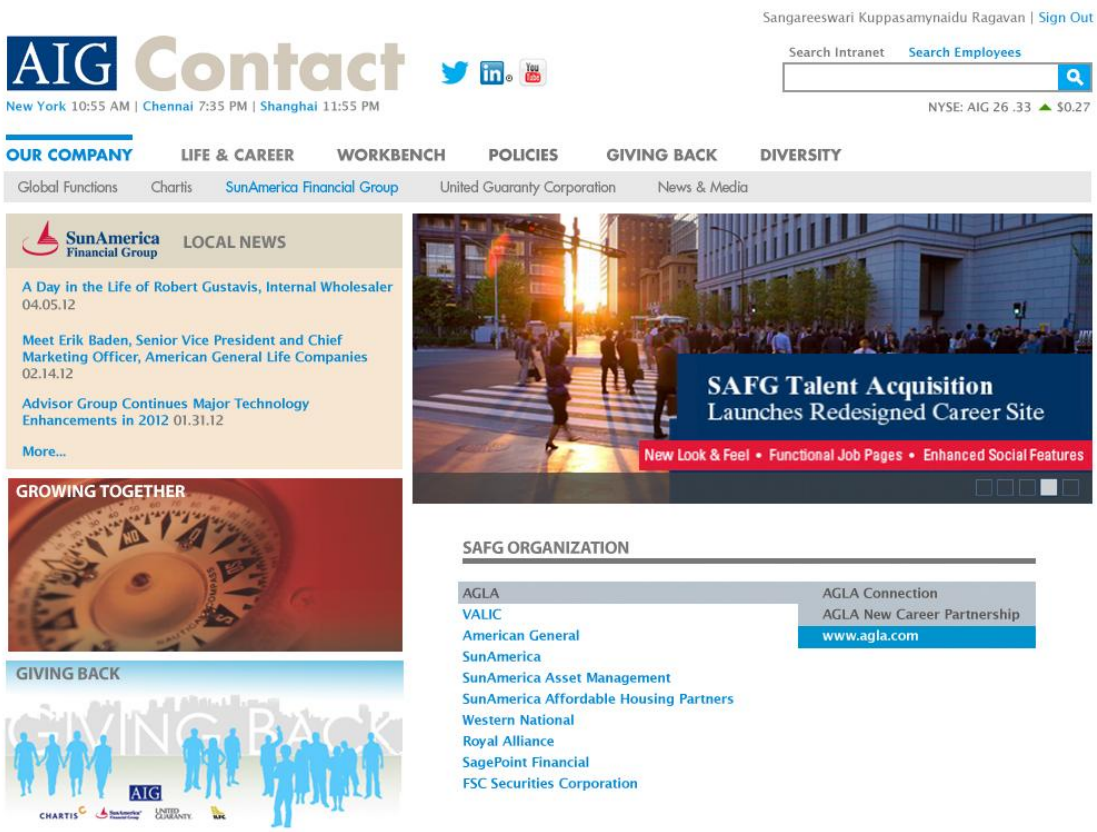
With a global workforce and varied product offerings, the designers wanted to ensure that employees could use the intranet to better understand the organization itself. Previous intranet versions didn't make it easy to learn about AIG's different companies and functions. The new intranet was meant to further unify AIG and its subsidiaries and to establish a better foundation for unifying the brand and culture. One way to ensure that the depth of the organization and its offerings are well represented on the intranet is to include them in an easy-to-navigate IA. On Contact, the mega menu navigation helped designers make the organization's departments and layers more transparent. The list of 30 links is easy to find under the *Our Company* section's *Global Functions* area. An "X" in the upper right of the mega menu lets users close it easily.



Pictured: The mega menu lets users see many different organizations and offices at a glance.

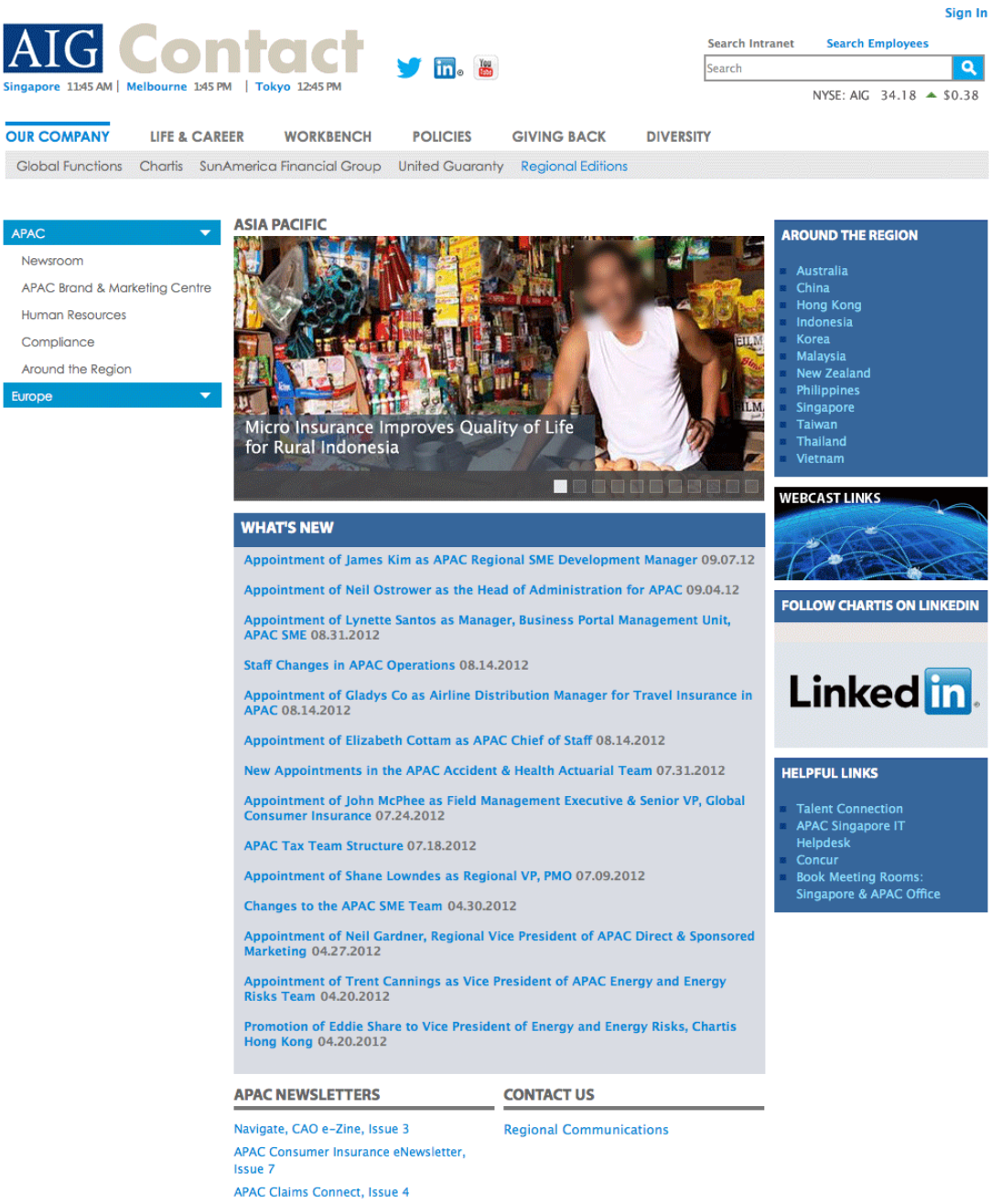
In the second tier navigation, employees can link to the main pages for each of AIG's major companies, including Chartis, SunAmerica Financial Group, and United Guaranty. These links are located in the second tier navigation because they are not considered to be global functions and thus wouldn't be understandable under that category.

Because many employees within these AIG companies will visit these section pages, some of the main homepage's content is ported here, while the rest is focused on the particular company. Also, these pages are meant to partially retain each company's particular identity while still looking like part of AIG. Thus, the page layouts vary, as do many of the colors, but the treatment for section headings remains the same as that of the homepage to keep a similar look throughout.



Pictured: The main section page for SunAmerica Financial Group, one of AIG's major companies.

Contact connects not just divisions and companies, but also regions, which can be found under the *Regional Editions* menu. The main section pages include news items and images in a carousel, plus a list of more news articles. The left side menu has links for news, brand and marketing information, HR, and other information specific to the region. The right rail has links to webcasts, pages related to countries within the region, and other helpful areas.



Pictured: Contact connects not just divisions and companies, but also regions.

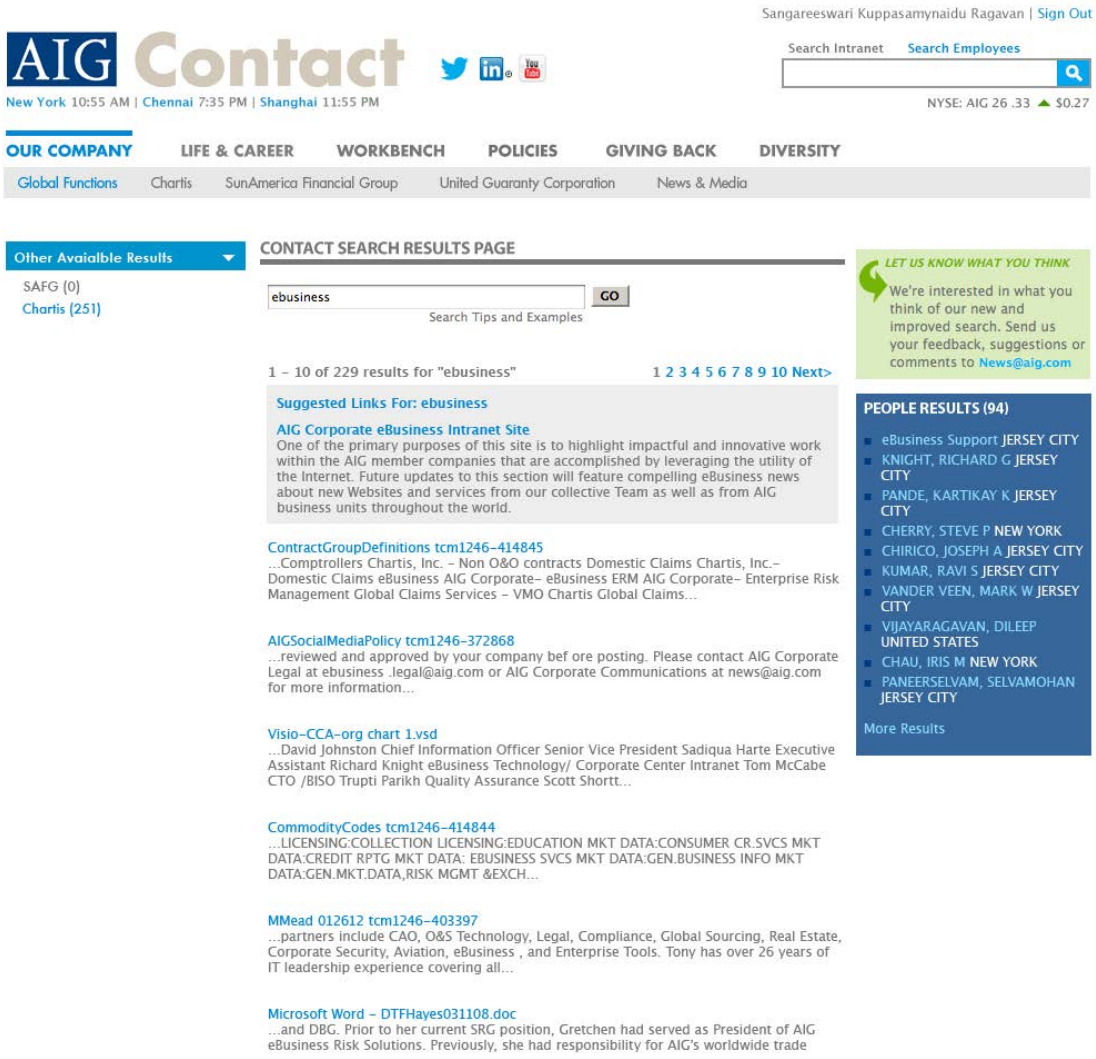
The navigation empowers employees to easily move around the AIG intranet, as does the search feature. Located in the upper right of all pages, employees can enter queries in the open field and can choose to search the intranet or just the employee directory. Search results display all the elements needed, including an editable field with the query repeated in it and a link to tips below the field, which is helpful for those who need it and easily ignored by those who don't. The number of results also displays, with pagination to scroll through.

Suggested Links are distinguished with a grey background from the rest of the organic links, which appear below on the page's white background. Items are added to the suggested links area based on the page's popularity according to metrics. The link to each result is shown in blue with descriptive text in grey below.

Users can click the *Other Available Results* filter in the upper left, which lets them see results for a particular AIG company. The number to the right of the company link indicates how many results will be returned.

The right rail displays a helpful feature: the top people results related to the search. These employees either match the query or are members of a department relevant to the query. This is useful for finding expertise about a topic an employee is interested in.

Overall, the inclusion and organization of a wide range of content and the diligent tagging of news items make the AIG intranet an informative and uniting experience for all employees.



Pictured: Contact's search results have all of the important usability features, including an editable field with the search query and simple links and descriptions. The results for people related to the search topic in the right rail are an added bonus.

BACKGROUND

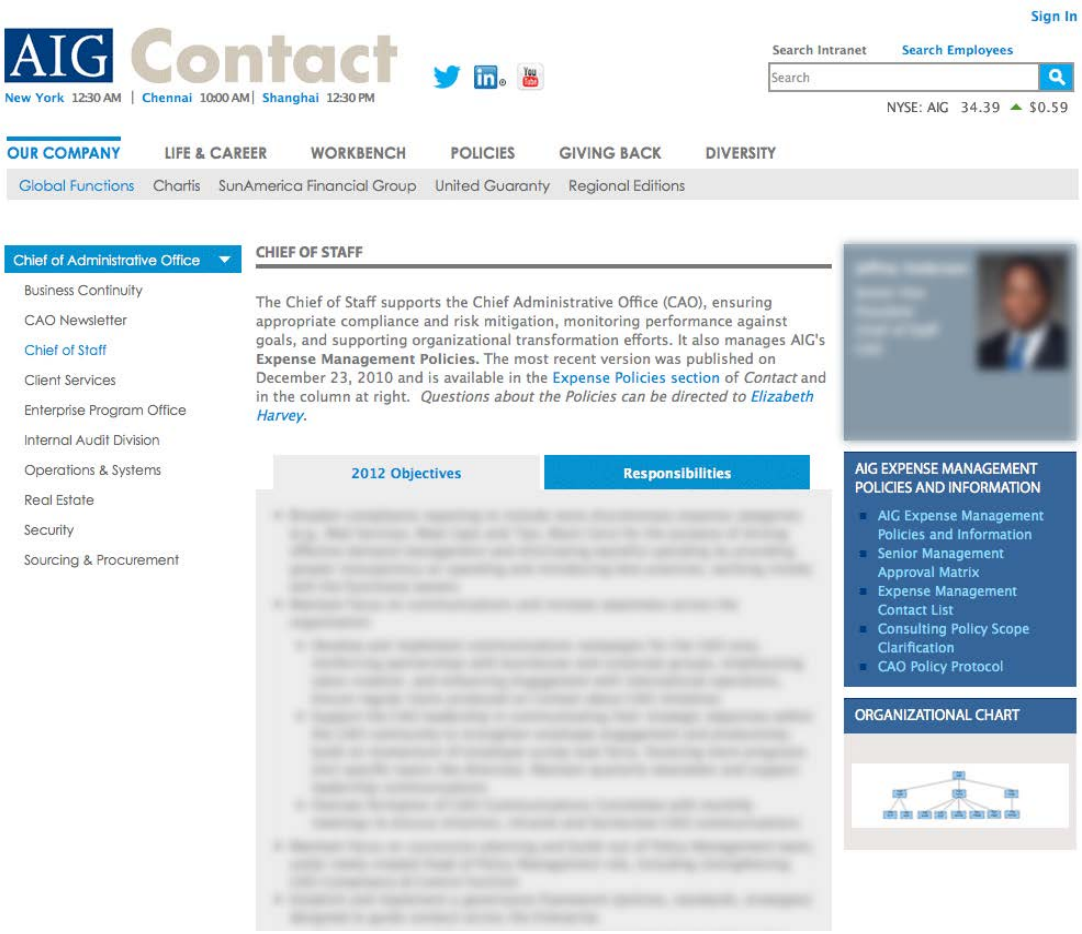
The company's latest intranet design was intended to further unify AIG and its subsidiaries and to provide communications platform supporting better access to key tools. "The goal was to unify the organization by breaking down both technical and cultural silos," says Victor Aviles, Director, Corporate Communications, as well as to "provide intuitive access to important tools and systems, make it easier for employees to access their important accounts (benefits, expenses, purchasing, business applications) and create a footprint for something more than just a site, and more along the lines of a global business and communications platform."

To accomplish these goals, the team gathered a significant amount of anecdotal user feedback through emails, as well as through a formal feedback form and surveys, personal interviews, and usability testing. "Some surveys were not specifically about the intranet per se," says Aviles. "While they were more about the organization as a whole and/or about particular departments and business units, they still provided valuable information. We also benchmarked other intranets and even websites."

Once there was buy-in, the project proceeded smoothly. It was executed within budget and on time.



Pictured: The landing page of *Giving Back*, one of Contact's top-level navigation sections. As this page shows, the primary blue used in the navigation is carried through to the rest of the design and is used for tabs and links, while a complimentary shade of blue is used in headings and backgrounds. Green and orange are used as accent colors in emphasized text.



Pictured: An interior site page showcasing the Chief Administrative Office's Chief of Staff. This design is used as a template for all businesses represented on Contact: a headshot and title appear at top-right beneath the header, with related links and an org chart for that department below them. Each page also includes introductory text so that visitors can quickly understand the department's function, regardless of how they navigated to the page.

INTRANET TEAM



Pictured: The AIG intranet team (front row, left to right): Pinkal Gandhi, Marie Villanueva, Victor Aviles, Keerthy Raghuveer, and Jechul Wee; (second row, left to right): Huy Lim, Bryce Lee, Sean Ryan, Lawrence Yee, and Brian Kirby; (back row, left to right): Richie Block and Frank Williams.

GOVERNANCE

Ownership

Corporate Communications owns the intranet, which has helped the site thrive. "Since Corporate Communications is at the epicenter of the company's news and strategic initiatives," says Aviles, "it is in a good position to prioritize intranet-related projects and to decide on the overall direction of the intranet."

This placement has also, conversely, helped influence the way the Corporate Communications team thinks about and communicates with employees worldwide. "In general, it has provided some common ground where employees can learn about and better interact with each other."

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Corporate Core Team	• Provide governance, program management, coaching, and Tier 2 support • Manage and maintain content and features available on the group intranet level
Producers/Content Managers	• Oversee portions of the site, ranging from a single page to dozens of pages and assets • Provide Tier 1 support for colleagues in their respective areas (by region, business unit, and/or corporate practice area) and vet and publish their content • Work with the core team to publish content on the homepage and provide direction on navigational and functional improvements
Technology	• Maintain the technical footprint and infrastructure and translate business requirements and Tier 3 support

USERS

Intranet users include employees in the US; Europe, the Middle East, and Africa (EMEA), the Asia-Pacific (APAC) and the Americas. This includes full- and part-time employees and consultants. As an insurance organization, the mix of employees includes a wide range of risk and underwriting professionals, as well as finance, administrative communications, and technology professionals.

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	• https://contact.aig.net
Default Status	• The intranet is bookmarked in users' browsers but can be changed.
Remote Access	• All employees are provided with secure, remote connectivity. The site is also accessible from the latest company mobile devices.
Shared Workstations	• A small group of users access the intranet from shared workstations (in mailrooms, for example) and at a resort (a legacy real-estate acquisition).

DESIGN PROCESS AND USABILITY WORK

Design Approach

The AIG team understands that the intranet is never "done" but is instead always evolving. That understanding informs the way they approach design—as an iterative, ever-changing process rather than a destination that can be reached. "Over the years, we've realized that the intranet is a good place to try new things (in a measured way, of course)," says Aviles. "The intranet will never be 'done' per se—meaning, if we do our jobs, the intranet should constantly evolve and reflect the company's character and how it operates. As a team, we've come a long way from the days of suffering from 'analysis paralysis.'

"In a sense, the intranet has been an ongoing series of controlled experiments," he says. "We've gotten better at learning from our experiences and have developed more mature practice areas in usability, search, and content architecture."

The team's approach is as practical as it is iterative. "For us, it is more often a matter of expediency than not," says Frank Williams, VP, Creative & Usability Services. "So sometimes it is easier for us to work off of comps because we were constantly iterating the designs based on the feedback we were receiving.

"We arrived at many of our solutions through a process of discussion, development of visual prototypes, and the iteration of those prototypes in response to many rounds of interaction with business owners, stakeholders, and end users," he says. "Having an accepted visual design really circumvented the need for bare-bones wireframing in a lot of the development because, without the need to remain design agnostic, we could just modify the closest-fit template to show the new functionality."

The AIG team utilized several research methods to inform its winning design. These methods included:

- **Checking server logs or usage stats:** "We try to base our decisions on web analytics, search analytics, content management activity logs, web logs, and helpdesk statistics reports," says Jechul Wee, Information Officer, Corporate Communications. "The historical usage stats are the real time saver. Things like load testing and understanding when the site is most heavily trafficked during the year (enrollment, employee performance cycles, etc.) and even what are the 'peak hours' help us plan ahead."
- **Beta testing of new design:** One of the key features of the new design was the mega menu for navigation. "Users told us that they wanted a better navigational structure, so we introduced the mega menu which became a big hit from day one," says Wee. Introducing the mega menu was done through beta testing sessions.

  "Once we had a working model of the mega menu and left side navigation, we conducted a series of demonstrations with approximately 100 employees of businesses across the US," says Brian Kirby, Manager, Content Strategy. "After explaining the purpose of the new navigation, we provided a staging URL so that attendees could try it out for themselves. This allowed us to validate the structure of the navigation and the links used in their construction, as well as provide an opportunity for feedback."

  These sessions helped the team confirm the new navigation approach. "We were pleased that the vast majority of the participants were both able to understand why the design changes were made and were supportive of the changes."
- **Meeting with other companies' intranet teams:** During the process of vendor discussions, the team was able to meet with intranet teams from a variety of companies and ask some pertinent questions about design, strategy, and technology, and learn from those teams' experiences.
- **Researching usability or design through books, reports, or other resources:** "Certainly, we pay a lot of attention to what key players are talking about and working on through blogs, reports and newsletters, seminars, design annuals, and personal relationships with other professionals in the field," says Bryce Lee, Associate Director of Creative and Usability Services. "When proposing specific solutions or defending their retention (people search, for example), it is useful to be able to point to authoritative support from outside of the company. Wherever possible, we validate our usability decisions by referencing published research from well-known firms like NN/g and Forrester."
- **Card sorting:** Although the team did not conduct formal card sorting, they did sort the extensive list of proposed features and functionality based on perceived user need, usage metrics, specific requests, and other value criteria, which determined inclusion and placement accordingly.

- **Sitting in on support calls or training:** Sitting in on support calls proved to be pivotal to helping team members really understand the challenges of features such as single sign-on from a perspective broader than their own expertise. "When we were working to enable some more advanced functionality on Contact, like single sign-on and establishing a standard password service (user authentication, password resets and retrievals, time outs, etc.), we spent a lot of time with technology teams from across the company, including the help desk," says Wee.

  "We have a good understanding of how technology can be put to practical use and a good enough grasp on systems—at least enough to marry them to business requirements," says Aviles. "But not all of us come from IT backgrounds, so sitting in on support calls with technical teams was very enlightening. It really influenced how we think about and interpret technical terms and specs and translate them into better, more intuitive functionality. For example, the password service is now pretty intuitive, and is similar to what people are used to experiencing at home when they reset a password on any of their other online accounts. That's *not* how it used to be on Contact. So that was definitely a step forward."

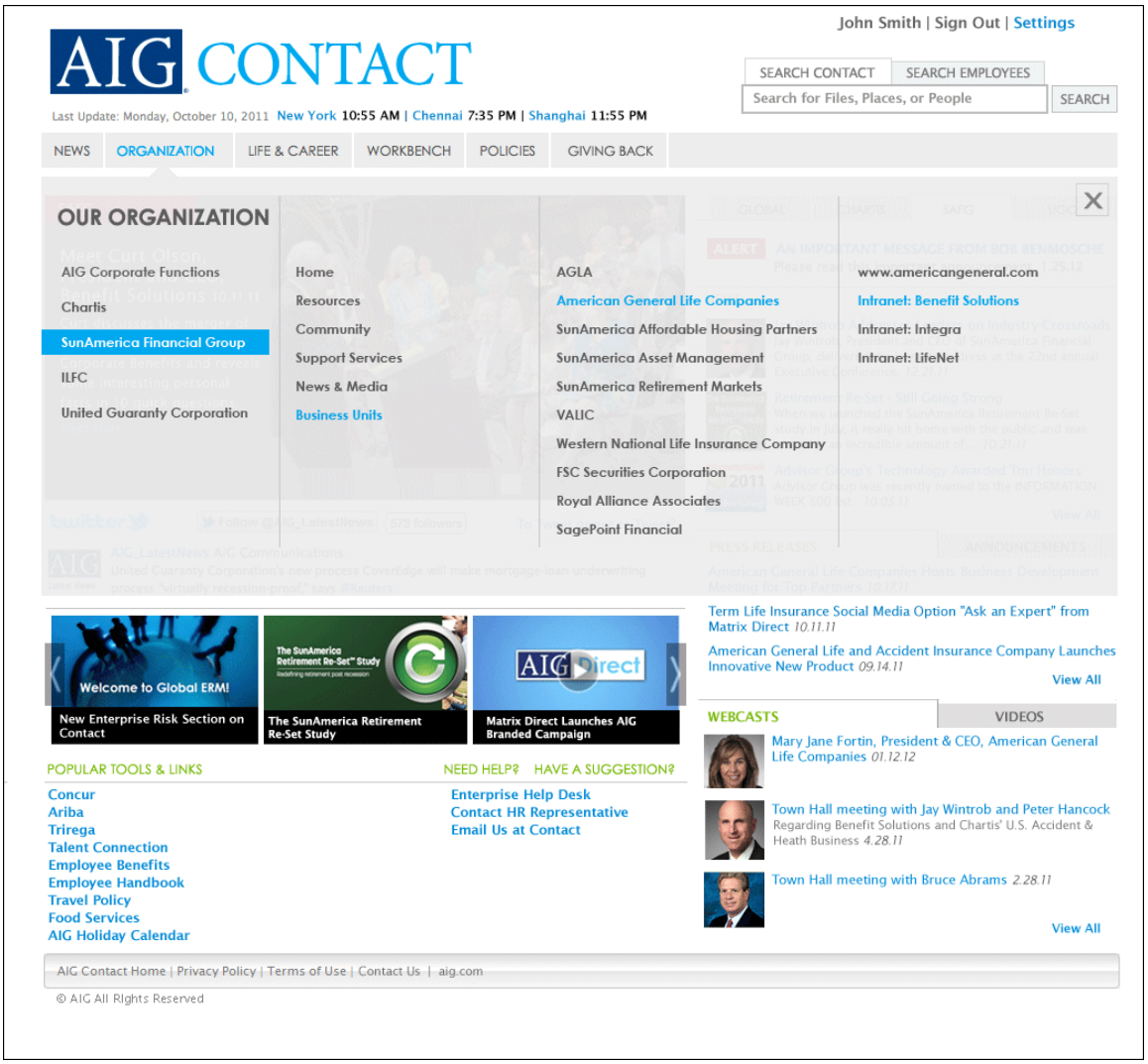
- **Monitoring user feedback:** The team paid close attention to how the site was being received by users. "Before we went live, we had a lot of discussions, sent an array of 'heads up' emails to key teams and to the company as a whole," says Aviles. "We really went out of our way to let people know that the changes were coming. We even provided a sneak preview of the site with explanations of the major changes, benefits, and a bit about our strategic direction. All of that really helped set expectations."

  The team also extended this outreach throughout the site launch period. "On launch day, there were also bright, visible banners on the homepage and on several high-visibility pages that read: *The New Contact—What's Different?*" This outreach yielded a lot of feedback that was both informative and useful for the team to act upon.

  "Thankfully much of it was positive," he says. "But people also let us know if they thought something that was easy to find before was now buried, or if they thought a particular graphic or sidebar treatment or font style made some copy difficult to read, or if they thought some aspect of the navigation was confusing," says Aviles. "We took each comment seriously and are getting ready to release some improvements."



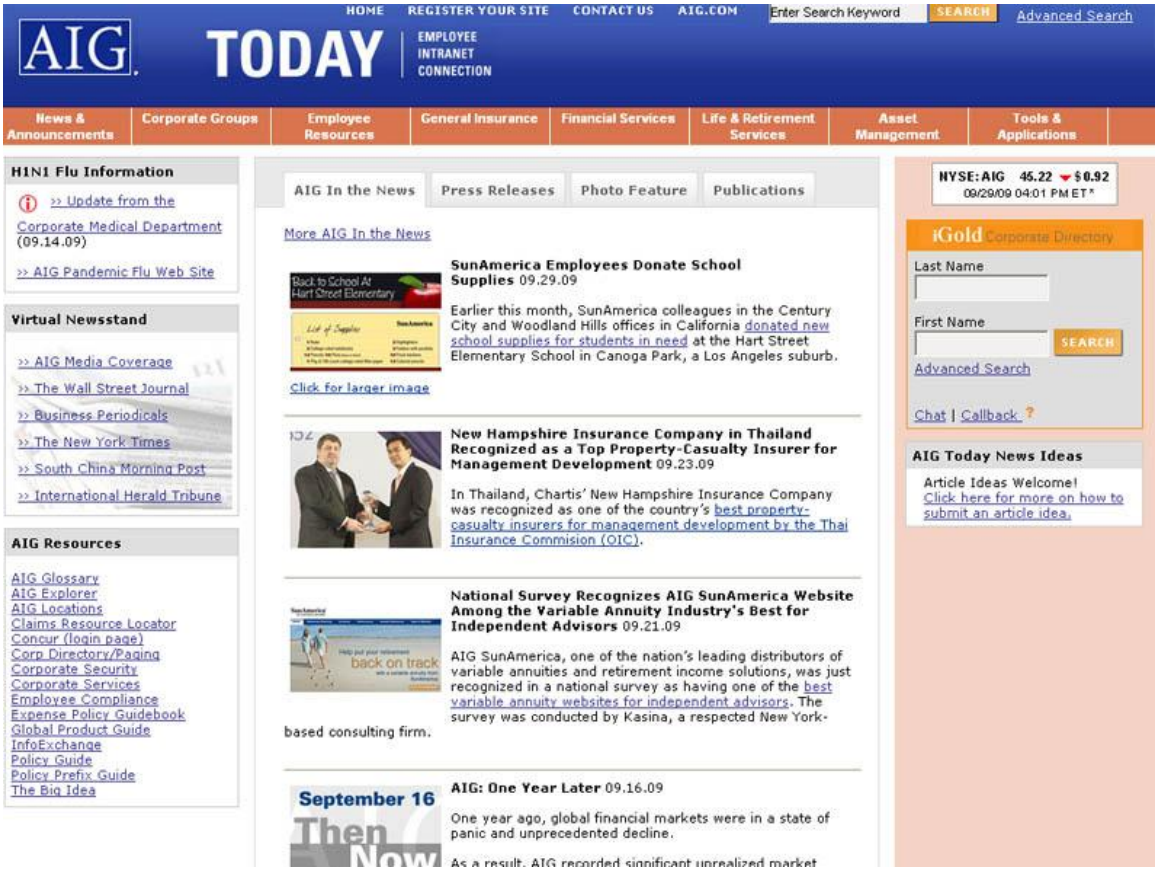
Pictured: A look at the redesigned homepage early in the process. The top tabs had been removed, although tabs were still being used to provide some separation between news items from different business units, as well as to separate press releases from announcements and webcasts from videos. Most images were reduced to free up the space needed to present more information. Links to AIG's social media presence, as well as a login link, were both introduced in this iteration.



Pictured: An early attempt at the mega menu navigation that was one of the key drivers of the site redesign. At this stage, the first column was dedicated to showing AIG's major divisions. However, it was decided that this approach was insufficient to the site goals. There were numerous instances of sub-pages below what can be seen here.

TIMELINE

INTRANET TIMELINE	
Milestone Date	**Milestone Description**
1996	• Launched first AIG corporate intranet
1997	• Issues of *Contact*, the company's longest running employee print publication (established in 1931), are made available online for the first time
2000	• Launched new corporate intranet called "AIG Today"
2007	• Redesigned and repositioned AIG Today as the core corporate intranet
2007–2009	• Consolidated the majority of intranets at the parent company/corporate
2009	• Rebranded the assimilated corporate intranet collection under the name "Contact"
2010–2011	• Unified the company's largest intranets (Contact and the two largest business unit intranets) with a shared navigation, search collection, and sharing of content and news stories
2011	• Introduced single sign-on and a common password service utility • Enabled high-quality video capability on the site • Enabled document collaboration through integrated SharePoint Team Sites
2012	• Repositioned Contact as the enterprise intranet, collapsing the largest business unit intranets into it and applying a common navigation, architecture, look and feel, search index, and domain • Released APAC edition of Contact
Overall redesign timeframe: Five years	



Pictured: The AIG intranet (then called *AIG Today*) as it appeared in 2009, two iterations ago. The site's focus leaned heavily on the company's structure, as all but two of the sections in the primary navigation (within the orange stripe) were dedicated to departmental information. The new design reduces this to a single section with the other navigational links pointing to sections for employee tasks and company policies and initiatives.



Pictured: AIG Contact prior to the start of the company's most recent redesign. At the time, the top tabs were intended to link to the intranet sites of other AIG business units, each of which had its own look and feel. The live site at the time had only three tabs (AIG, Chartis, and SunAmerica); this screenshot shows what would have been the next iteration had tabs for United Guaranty and International Lease Finance Corporation been added. This divergent approach to representing the various intranets was one of the reasons why the most recent redesign effort was focused on unifying AIG's business units into a common look and feel.

CONTENT AND CONTENT CONTRIBUTORS

The AIG team chose Tridion as the CMS because, "it was very well rated at the time (and still is)," says Pinkal Gandhi, Director of Content Management Services. "It complies with AIG's rigorous corporate branding, security, and legal standards; allows employees to access the system no matter where they are located and also permits them to localize content to better fit the needs of their region; establishes design templates that are easy to understand and can be centrally managed; and provides support for a variety of rich Internet applications, such as Flash and Silverlight, but also social networking platforms that AIG is beginning to use more broadly, such as YouTube, LinkedIn, and Twitter."

"Tridion has served us well over the years," he says. "Today, we're actually using both SharePoint and Tridion and are starting to rely more heavily on SharePoint."

Although thousands of employees use SharePoint collaboration spaces on the site, the Corporate Communications team has identified about 60 employees who actively produce online editorial content for both functions and businesses.

"Several functional, business, and regional sections comprise Contact," says Keerthy Raghuveer, Manager, Multimedia Services. "Each has a content owner. Although we try to ensure the integrity and consistency of messages, and tone and style, we try to let subject-matter experts take ownership of their content. Accountability is crucial."

Editorial Workflow

Workflow is critical to keeping high-quality content on the intranet. "We don't just post and leave content," says Raghuveer. "We actively manage it and take pride in looking at content through the eyes of our employee audience."

Here's how it works: content owners submit content for relevant site sections (including the homepage). The team reviews the content, provides edits and recommendations (if any), returns it to the content owner for approval, and then for final sign-off. Lastly (if there are no other changes), they provide an online preview and publish the story/content live.

Working with Templates

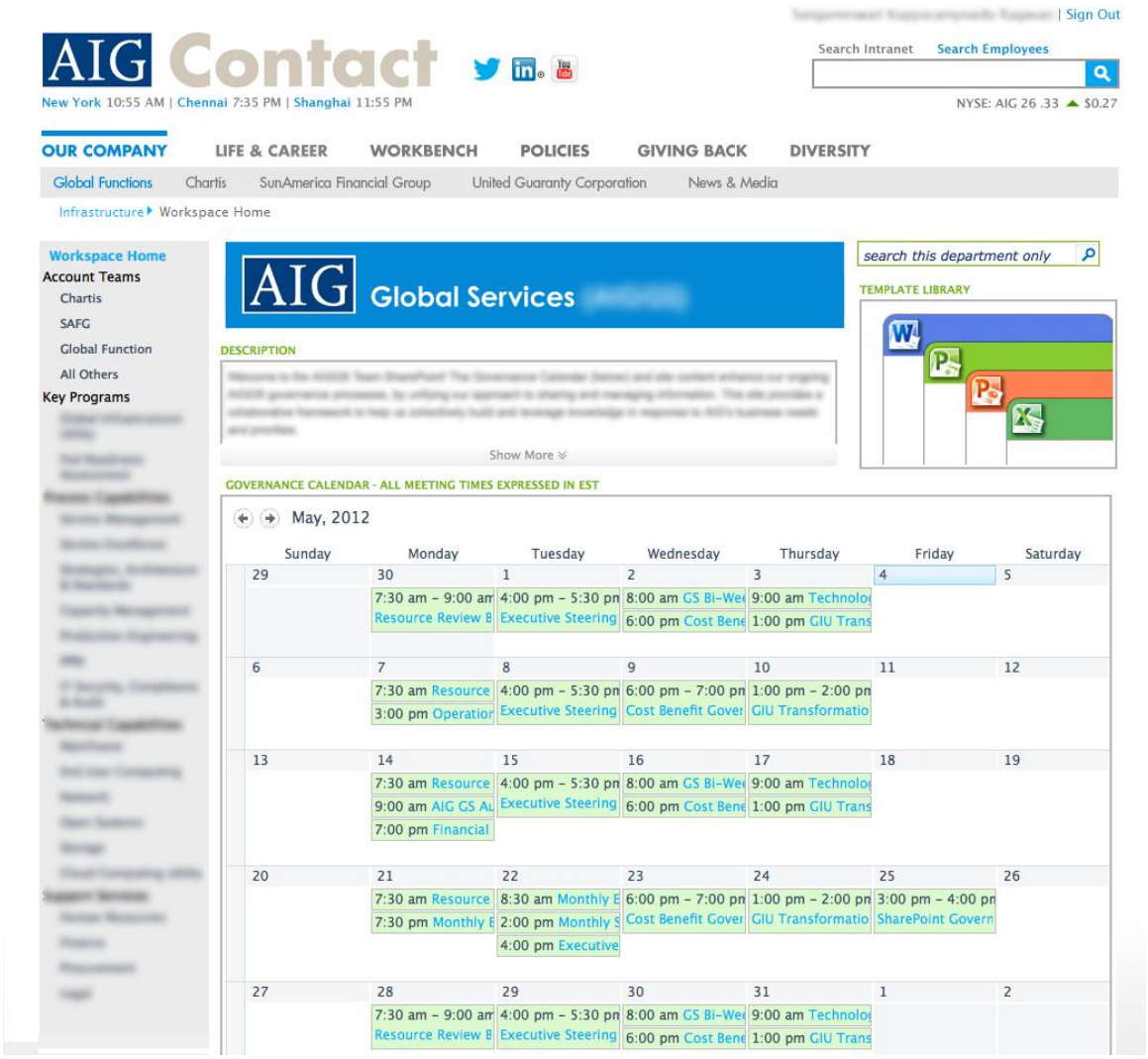
All content owners/contributors are given a standard set of design and page templates/wireframes options, giving the content developers both choice and standard guidelines. "We have also started standardizing employee newsletters," says Williams. "The new templates provide a concise interface that allows content to be housed on Contact, where it can be searched and easily retrieved."

The AIG team takes the carrot rather than stick approach to encouraging compliance with the templates and standards. "We think it is more about *encouraging* than ensuring or enforcing" says Raghuveer, "especially since more and more people are working and collaborating on Contact. While each and every content owner/contributor must comply with our guidelines, they also need a certain level of freedom to effectively 'own' their section of the intranet."

Training Content Contributors

Training is critical to maintaining quality content standards. "Providing adequate training to the contributors is vital from an operational standpoint," says Raghuveer. "Content contributors come from different professional backgrounds and have different levels of technical understanding. So, asking someone to manage an unfamiliar system is unfair and will only create a mess."

Generally speaking, the team assesses the level and type of training required on a case-by-case basis. It can vary from a web meeting to a classroom to a one-on-one training session. The team also provides supporting documentation as users complete the training session. "Additionally, we team up with IT to make it as easy as possible for content contributors to access, edit, and update their content," he says. "A few examples of this partnership with IT include addressing performance issues, automating the archiving and syndication process, and rolling out a script to address desktop issues related to the content management system."



Pictured: Content on SharePoint sites is managed by their departmental owners, who are permitted to add, modify, and remove template web parts as well as the "quick launch" navigation, which replaces Contact's left-side navigation. The look and feel of the header and primary navigation are pulled in from Contact to maintain the established design.

TECHNOLOGY

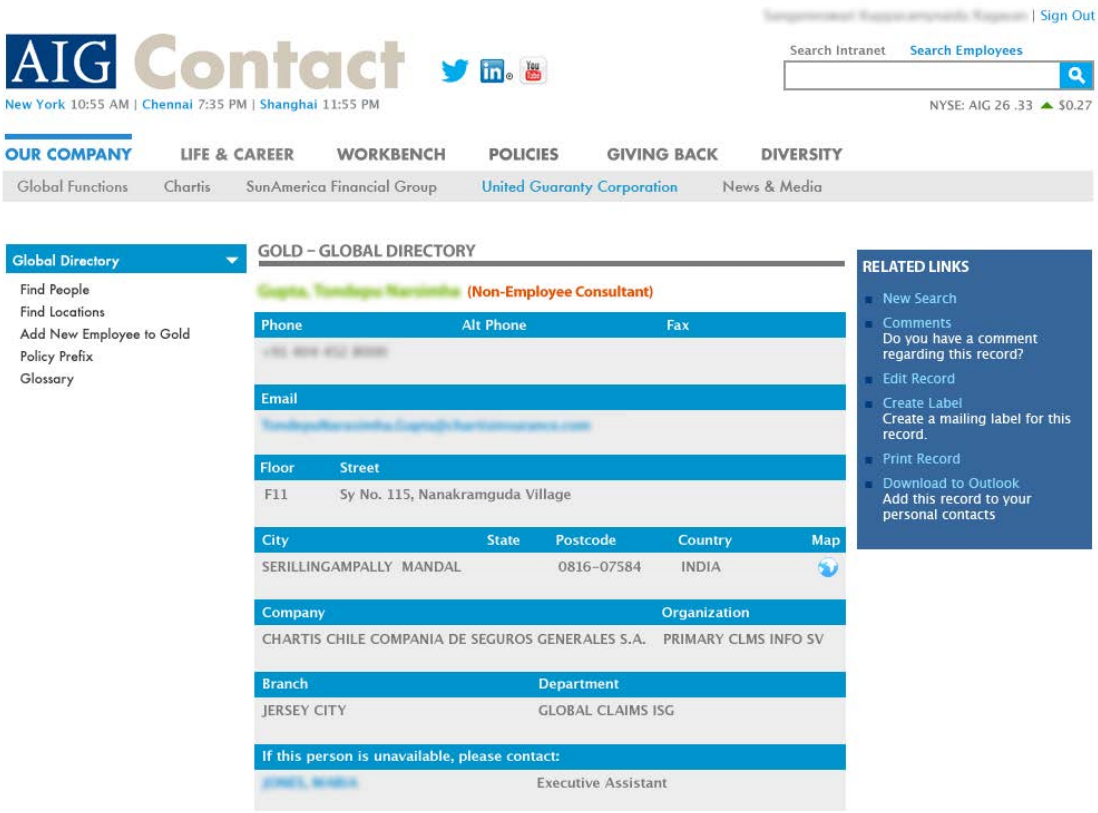
TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and O/S	• Intel-based hardware running windows and Linux O/S
Bug Tracking/Quality Assurance	• Serena Business Manager • HP Quality Center
Design Tools	• Adobe Suite
Site Building Tools	• Tridion • SharePoint • The design team's hands, heads, and eyes
Content Management Tools	• Tridion • SharePoint
Search	• Ultraseek • SharePoint search
Other Functions	• CA SiteMinder • Novell IDM

MOBILE

The site is mobile friendly, meaning everything that works in a desktop browser scales to a mobile screen, but nothing has been optimized specifically for small screen viewing.

SEARCH

AIG's intranet search is powered by the same search engine that is behind the company's public website. AIG, like most companies, makes refining search results an ongoing process. "We tweak search results so that they're aligned with what people are clicking on and searching for," says Wee. "We also sometimes tweak the search engine based on the company's lifecycle, reflecting things like benefits, performance, branding, and other timely information. However, we are gearing up to upgrade to Google Search Appliance, which will allow us to combine people and intranet results, and generally provide the type of search experience to which people are accustomed in their daily personal lives."



Pictured: The employee search on Contact initially presents results in a list, sorted alphabetically by last name. As this screen shows, when clicking a name, the site visitor is presented with a detailed view.

RESULTS AND ROI

Members of the AIG team explain how the new intranet has impacted the business:

- **Cost-saving integration without user disruption.** One "feat" worth noting is the successful integration of content from about 50 intranets (so far). Accomplishing this has meant constantly tweaking the site architecture and navigation, and repositioning and streamlining content almost continually over the past few years—all without disrupting employee's work lives.

  "This integration has set the foundation for more serious cost-savings and cost-avoidance discussions when it comes to the intranet. Based on the annual cost of launching and maintaining a distinct intranet, which we now know, it is possible to quantify some value. Every site we decommission can arguably be viewed as a maintenance cost-save; every section we develop within the fold can be viewed as a cost-avoidance." (Aviles)

- **An intranet by any other name would not be as successful.** "Although it may seem nominal, one of our successes was choosing the right name for the intranet. 'Contact' is the name of AIG's longest running employee publication, which has been in circulation for more than 80 years. *Contact* is an extremely well-respected publication with a rich history (and deep archive), which benefitted us greatly." (Aviles)
- **Region editions.** "We are also proud of our regional 'editions' of Contact, which we have started rolling out recently. This is important because businesses outside the Americas have historically not been as well represented." (Aviles)

  "This is a significant departure from the days of every region fending for itself with very little guidance—and no real connection between regional intranets and the core enterprise intranet. Having all employees log in to the same intranet (albeit a different section of the same intranet) sends a very powerful message. For new employees, one site, one company will be the norm." (Kirby)
- **Increased usage.** The new intranet has seen a marked increase in overall usage. "The *Life and Career* section of Contact, where many employees access their benefits and goals, saw an increase of over 100,000 hits in July of this year compared to the year prior. The new navigation also resulted in increased visits to a number of areas of the site. For example, the team site for the Corporate Center has a 340 percent increase in visits year over year, and Corporate Communications' visits were up 320 percent. Metrics also revealed that the decision to integrate other applications into Contact via single sign-on made their usage more prevalent. The figures for direct access noticeably increased for four of the five applications from June to July of this year. That number has remained higher than the previous usage trends, so we know that this method of access has become the standard for most of the employees who use these applications." (Richie Block, Manager, eMetrics)

Single Sign-on: One Feature with Many Benefits

Providing a reusable single sign-on and password service via the intranet has been a "big deal."

"It means that employees have an intuitive and centrally managed way to log in to some of the company's most widely used applications," says Aviles. "As many employees see it, it means a whole bunch of passwords that they no longer need to worry about. All they need to remember is whatever information they use to log in to work every day. From a technology and business process perspective, it means not reinventing a very expensive wheel."

Single sign-on also means that individual business units don't have to build their own solution to provide easy access to an application or tool that is specific to their business. And this is a cost savings. "We measured the cost of building a stand-alone password service—including tweaking the security environment, interface, password rules, etc.—and quantified it based on the amount of time a typical engagement takes and the number of people involved," says Wee. "And the number was significant. Every application that now benefits from the central service can be considered a significant expense that has been avoided."

Metrics have also revealed that single sign-on has led to increased usage for the applications integrated into the service. "The figures for direct access noticeably increased for four of the five applications from June to July of this year," says Block. "That number has remained higher than the previous usage trends, so we know that this method of access has become the standard for most of the employees who use these applications."

LESSONS LEARNED

Aviles shares two of the team's key lessons learned:

- **More white space and less clutter.** The generous use of white space and a less cluttered approach to landing pages was the biggest lesson (from a UI perspective) for the AIG team. Many aspects of the site benefitted from this design approach, including the following specific design elements and outcomes:
    - **Mega menu:** "Allowed us to simplify navigation across the first four levels of the site, and opened up space on the main landing pages."
    - **Shorter news teasers:** "Allowed us to make the page less text-heavy and better prompt readers to click to read more."
    - **Strict use of spot color:** "Lessened the dependency on heavier formatting elements—like rules, boxes, heavy fonts, icons, and other things that can weigh down content."
    - **Strict design parameters:** "Ensured that banners, photos, and other graphic design elements tightly integrate with the overall look and feel of the site, and can serve as integral parts of the user experience of the site, rather than just randomly placed eye-candy."
- **Don't try to solve everything at once.** "Focus instead on the big issues related to your businesses, and make visible progress on resolving those issues, even if it's gradual. Momentum is key to the success and adoption of an intranet, and visible progress is a key driver for building that momentum. Also, start with a sensible design without too many bells and whistles; establish a baseline upon which you can build and morph over time. Lastly, I'd say keep the business goals of the organization in mind throughout every iteration. That's where the answers lie for design, architecture, and overall intranet strategy."

Luzerner Kantonalbank AG

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 Manger; Roger Baumeler, Requirements Analyst; Peter Mitura, Webmaster; Esther Schwarzentruber, 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.



Pictured: Users can access tools, news, current rates, and more from the homepage.

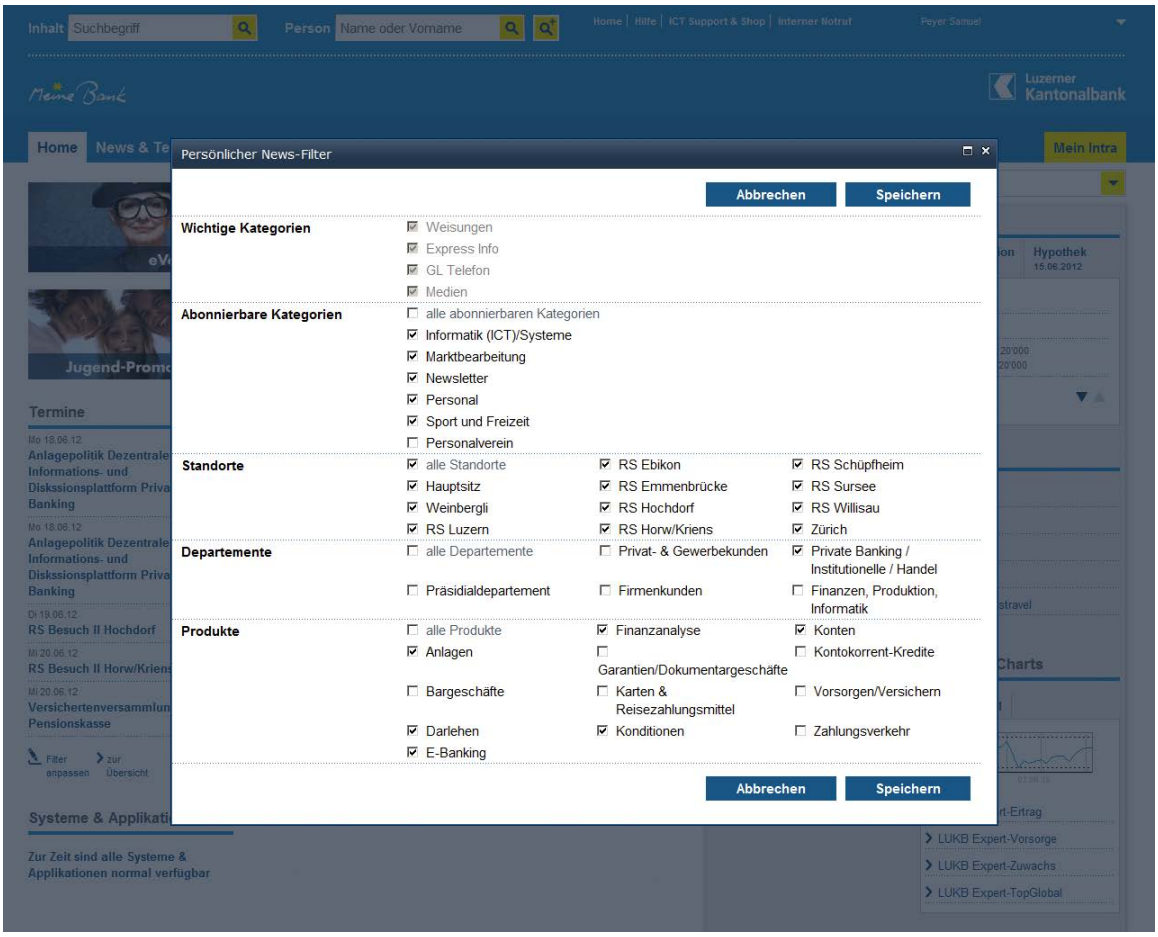
To cater to various user types, designers created customized homepages with helpful content and links targeted for each intranet user group. For example, the homepage for client advisors shows current interest rates, while the homepage for marketing staff displays current news. Employees can choose the most suitable homepage or "startpage" to see what they want and need.



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:

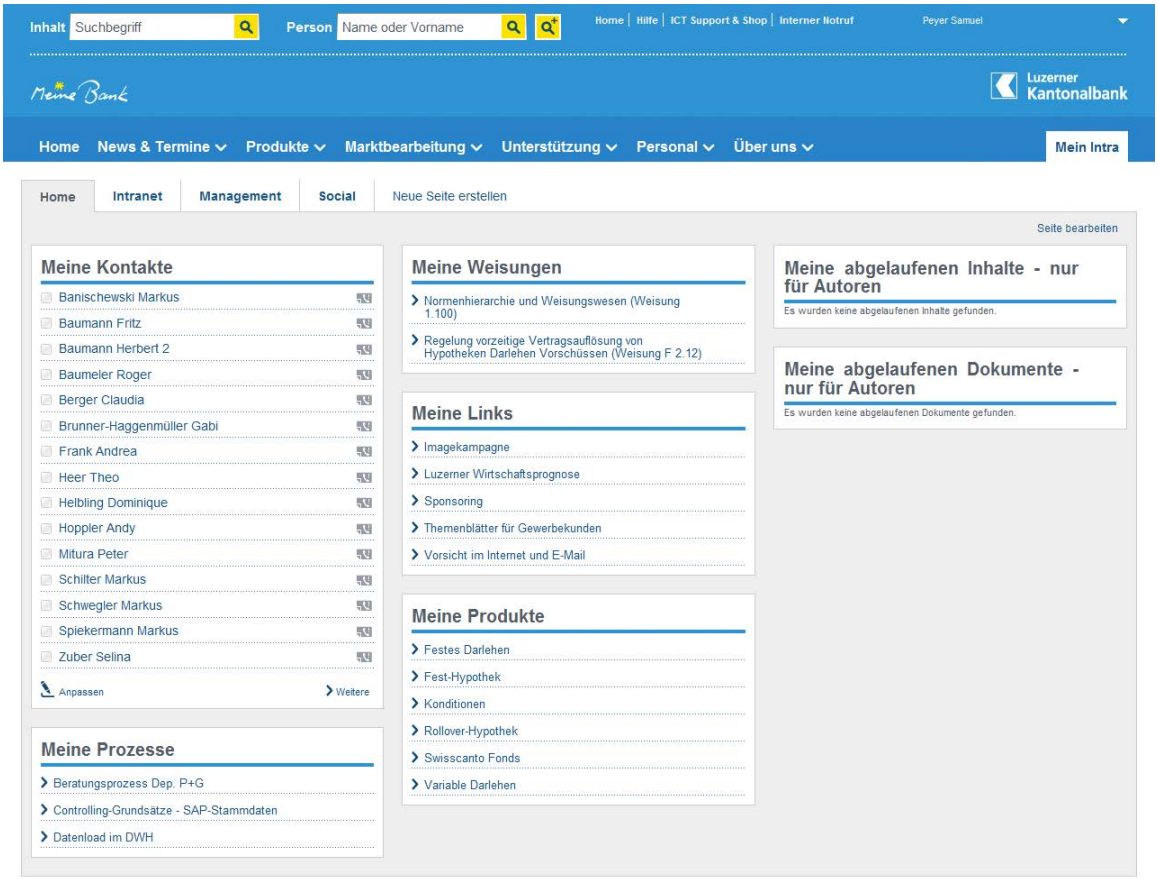
- *Wichtige Kategorien* (*Important Categories*)
- *Abonnierbare Kategorien* (*Subscribable Categories*)
- *Standorte* (*Locations*)
- *Departemente* (*Divisions*)
- *Produkte* (*Products*)



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).

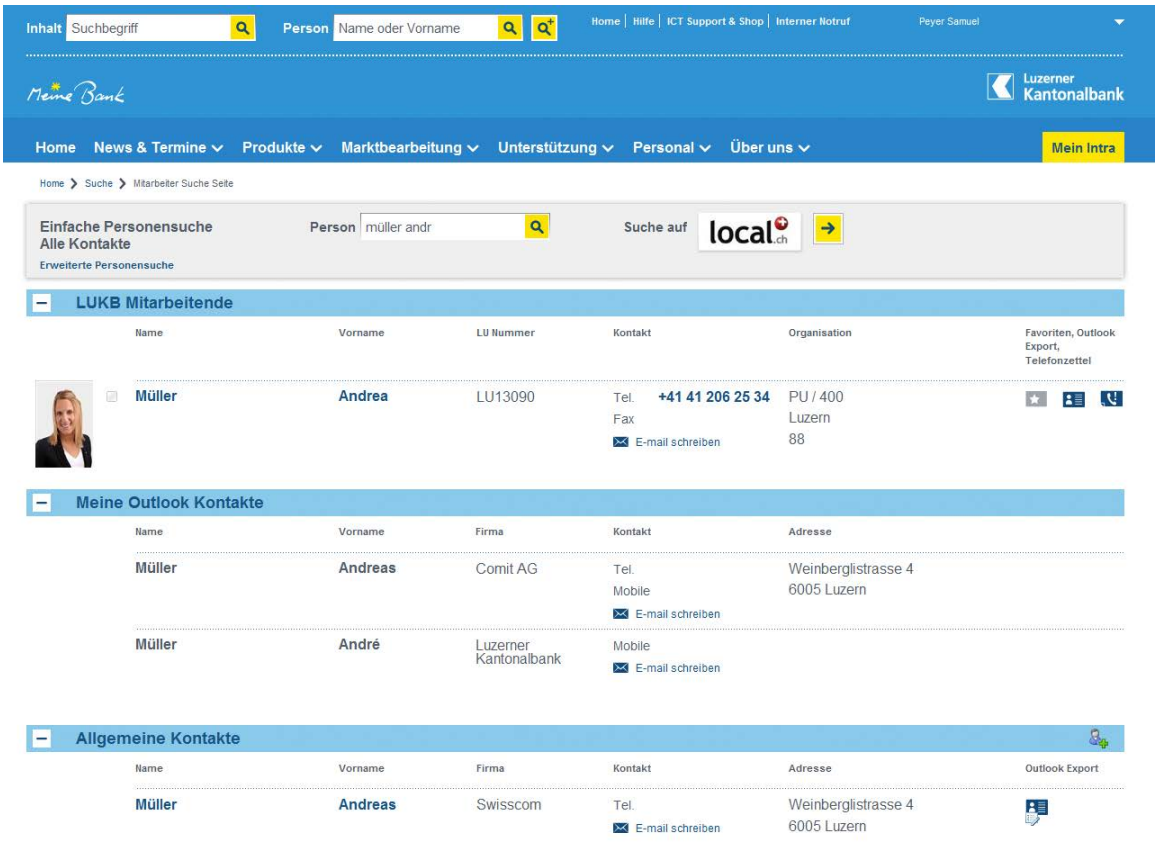
Users can also click the person's name or photo to go directly to the profile page.



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."

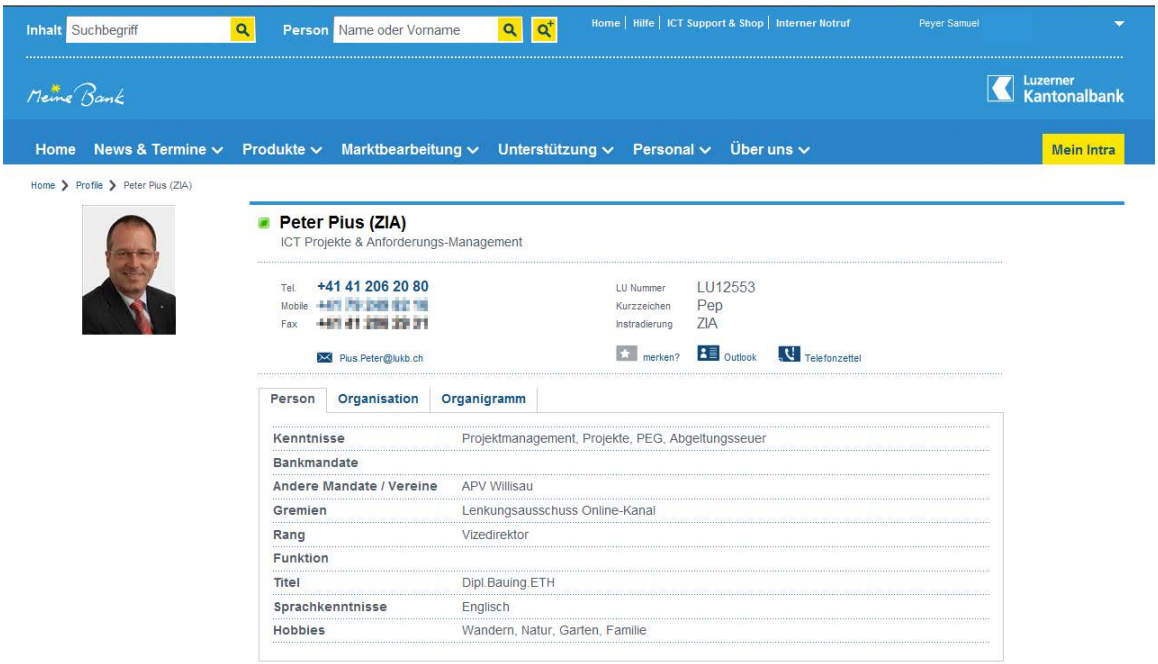
The people search results page has a few more features than the suggestion list, including functionality to let users add the search results to their contacts or export them to Outlook.



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.

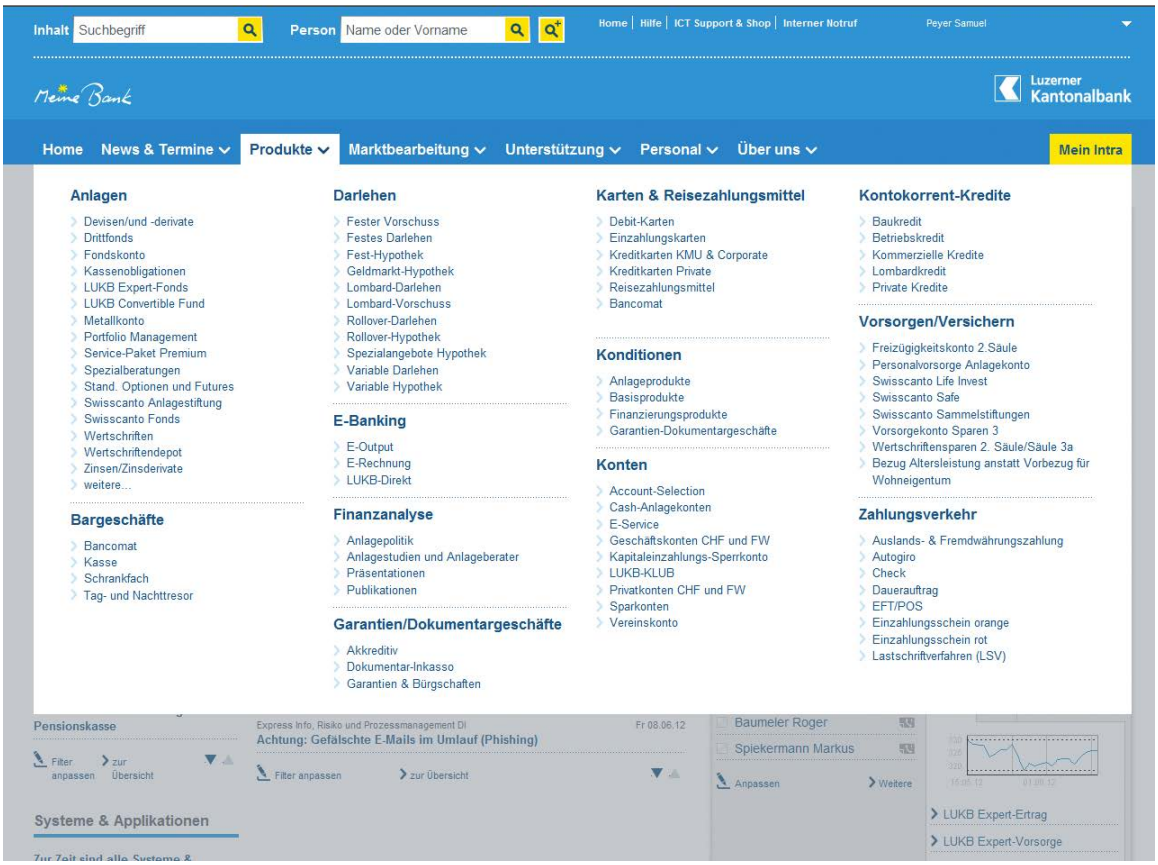


Pictured: On the profile page, important information appears at the top, with less important information following below it in tabs.

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:

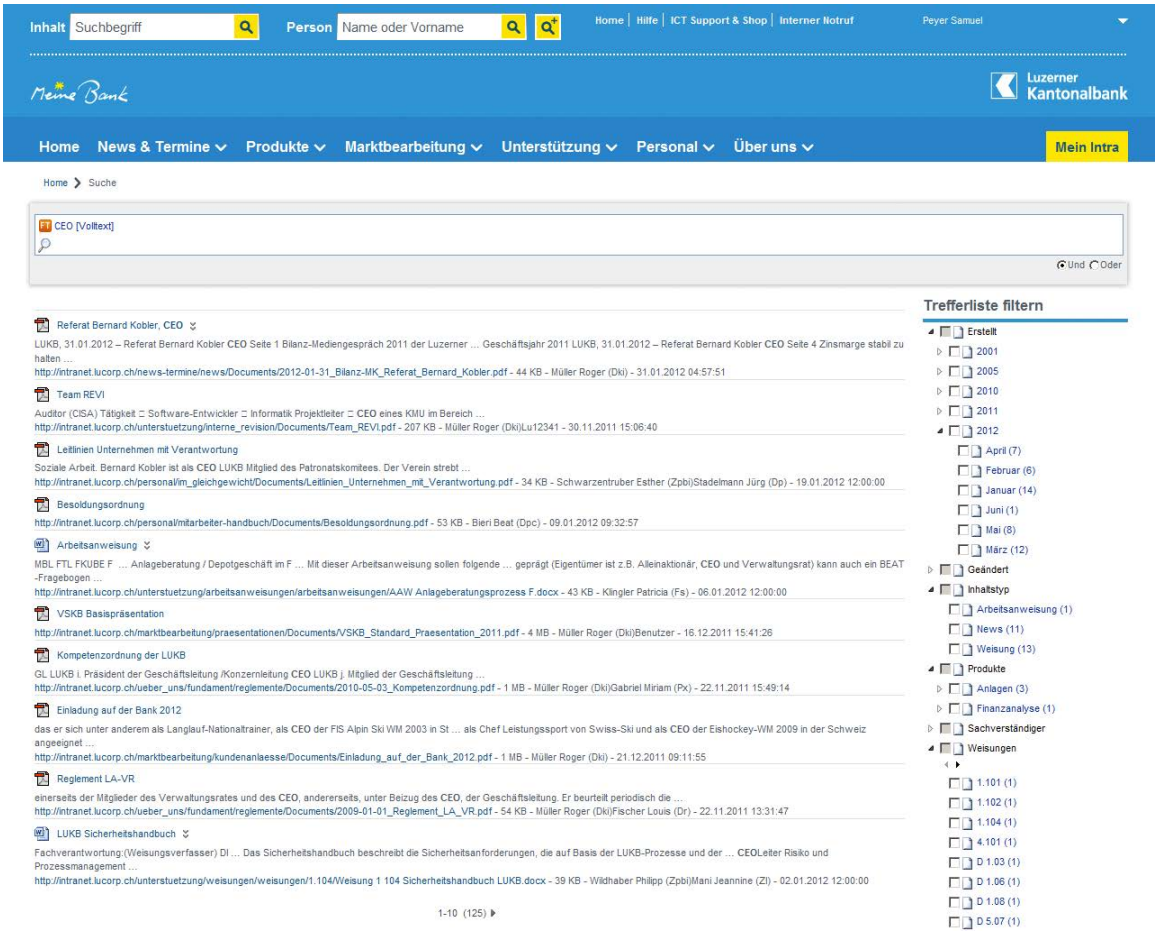
- There is vertical space between the menu's edges and the page on both sides.
- The menu tab's background is the same color as that of the mega menu. This is a cue to users that they are in a particular menu.
- There is no line or other separator between the tab and the page, so they flow into each 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:

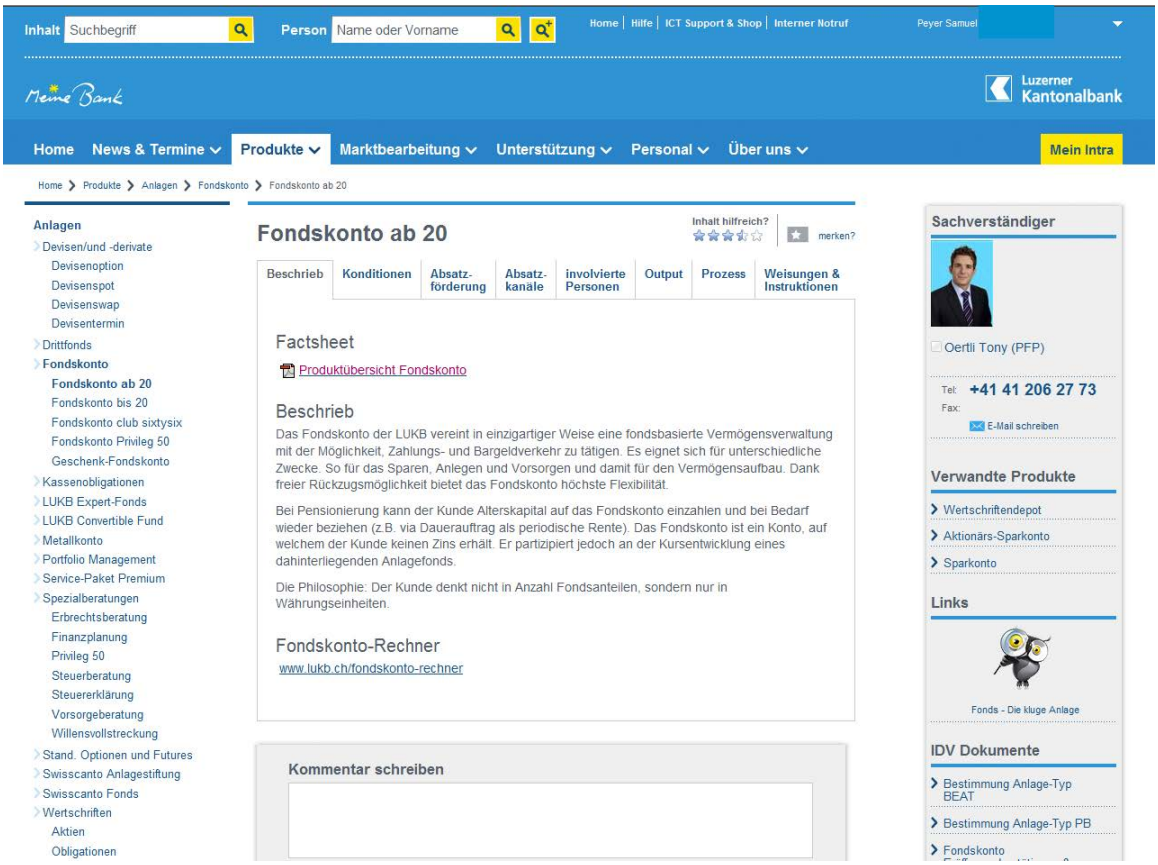
- *Erstellt* (*Creation Date*)
- *Geändert* (*Last Edited*)
- *Inhaltstyp* (*Content Type*)
- *Produkte* (*Products*)
- *Sachverständiger* (*Expert*)
- *Weisungen* (*Instructions*)



Pictured: Users can filter search results by various factors, including creation date, last edited, and content type.

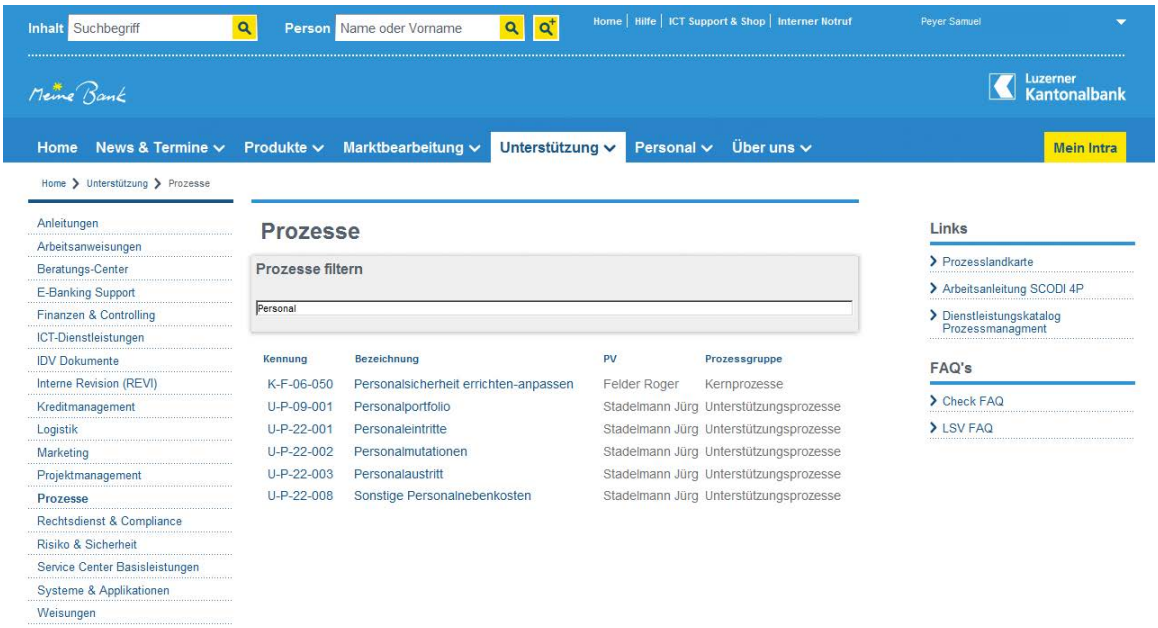
Customer advisors regularly use the financial product pages to find information for clients. It's thus important that they find correct, current, and thorough information in these areas. The intranet again uses metadata to automatically populate the product pages in understandable ways. This eliminates 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.



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

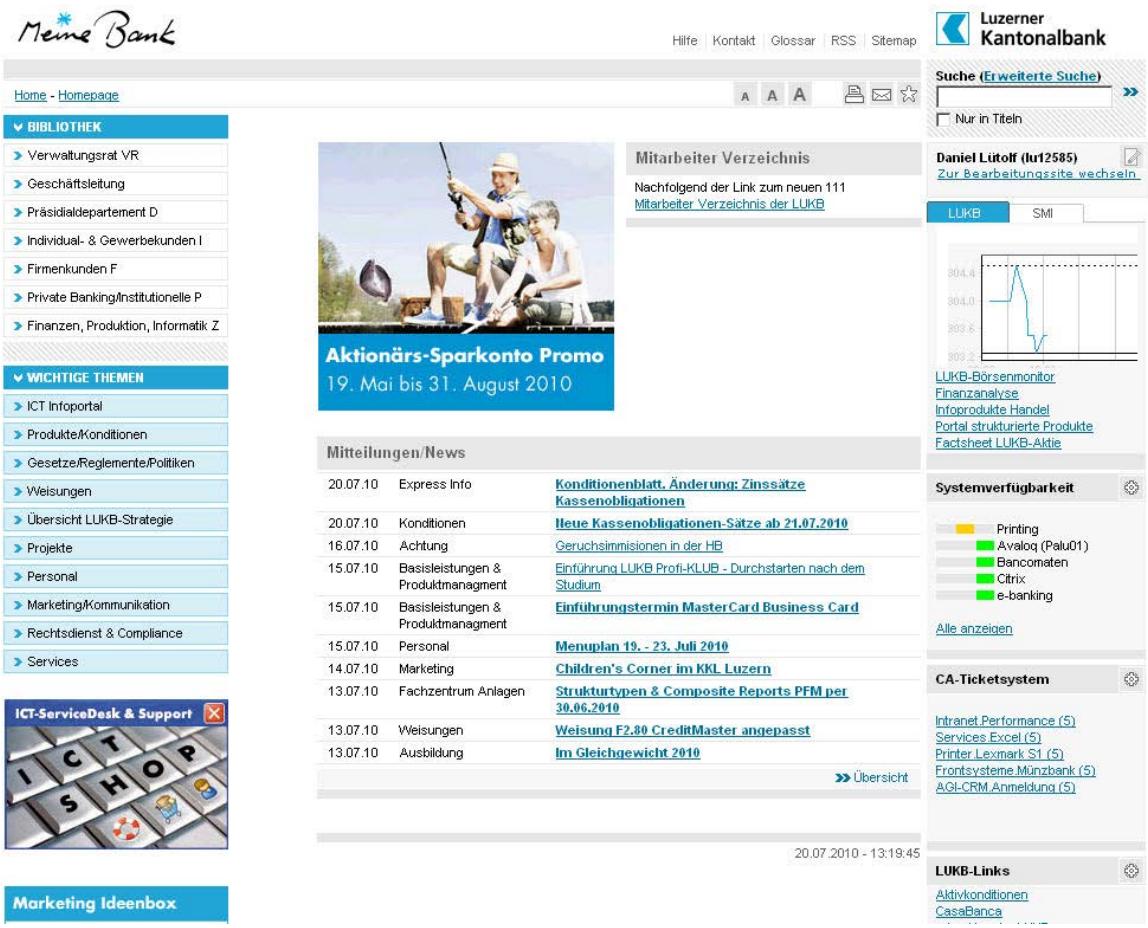
The vision driving the new intranet had many branches, including: improve workflows, use shared knowledge, strengthen employee participation, and create "digital values."

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.



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 Schwarzentruber, 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."

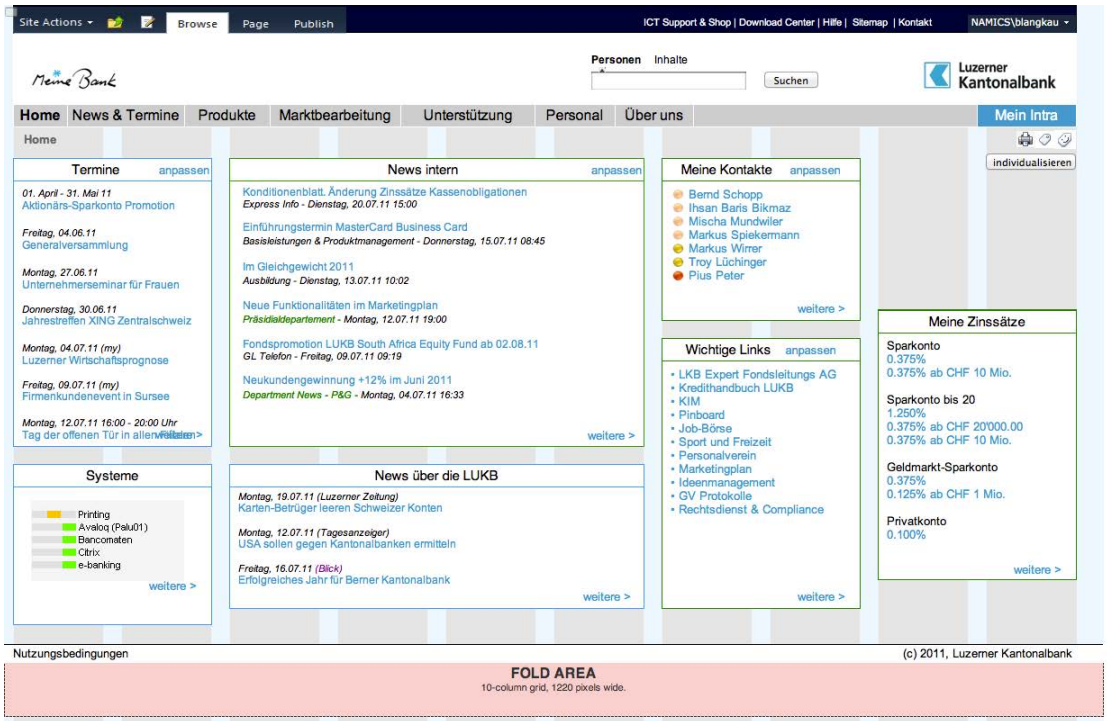
The LUKB team worked closely with Namics to develop the business concept (intranet goals, IA, wireframes, and functional specification) and also outsourced to Namics the screen design, technical specification, front-end engineering, programming, and implementation of the solution (on SharePoint 2010 and MatchPoint 3.0).

Iterative Design and Team Work

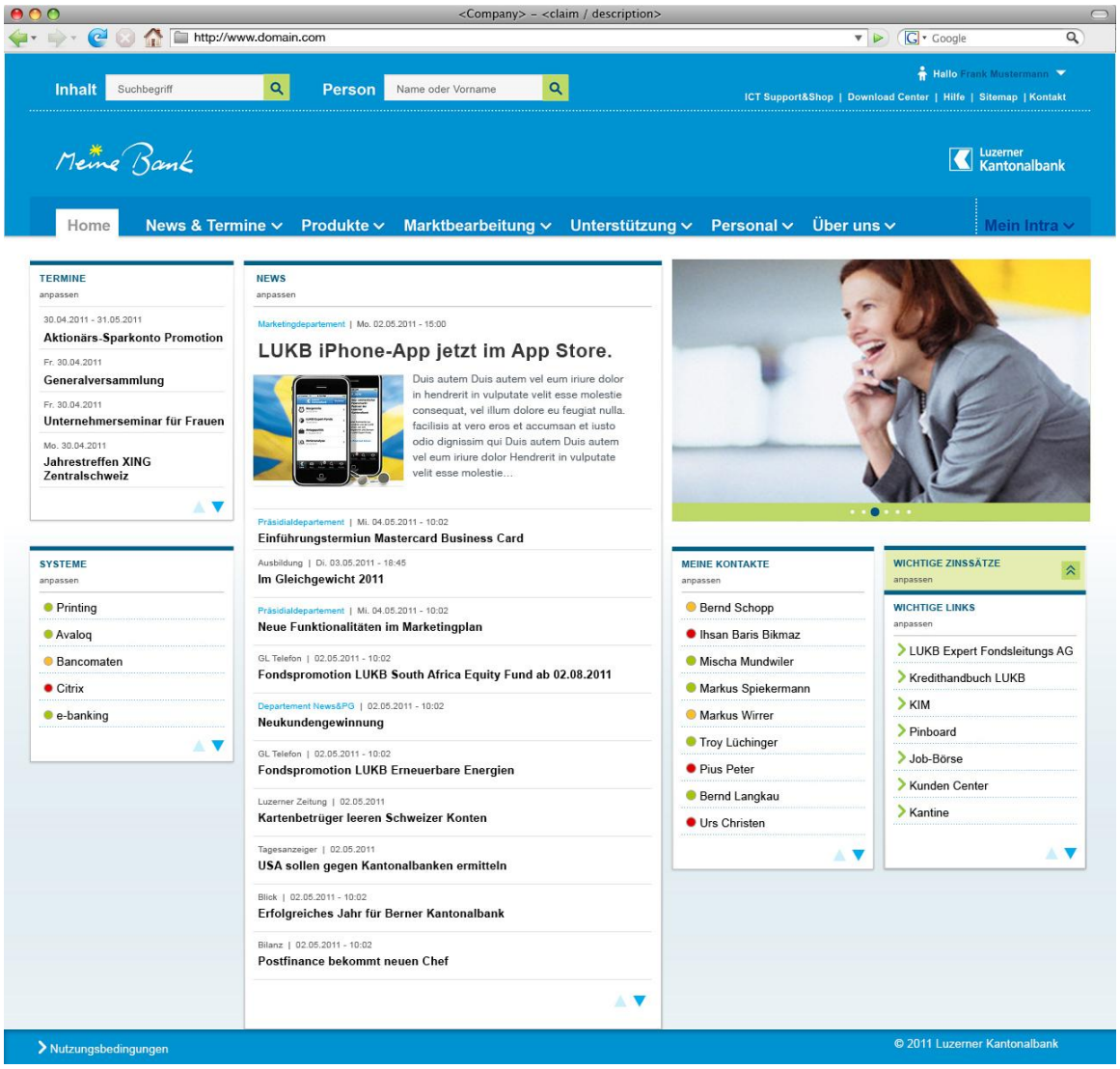
The design prototype was developed as a series of wireframes in Axure. These wireframes were used in workshops, where the team developed the site's functional specification iteratively. This process worked very well for both teams. "The process of us (Namics) presenting different solution variations 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).

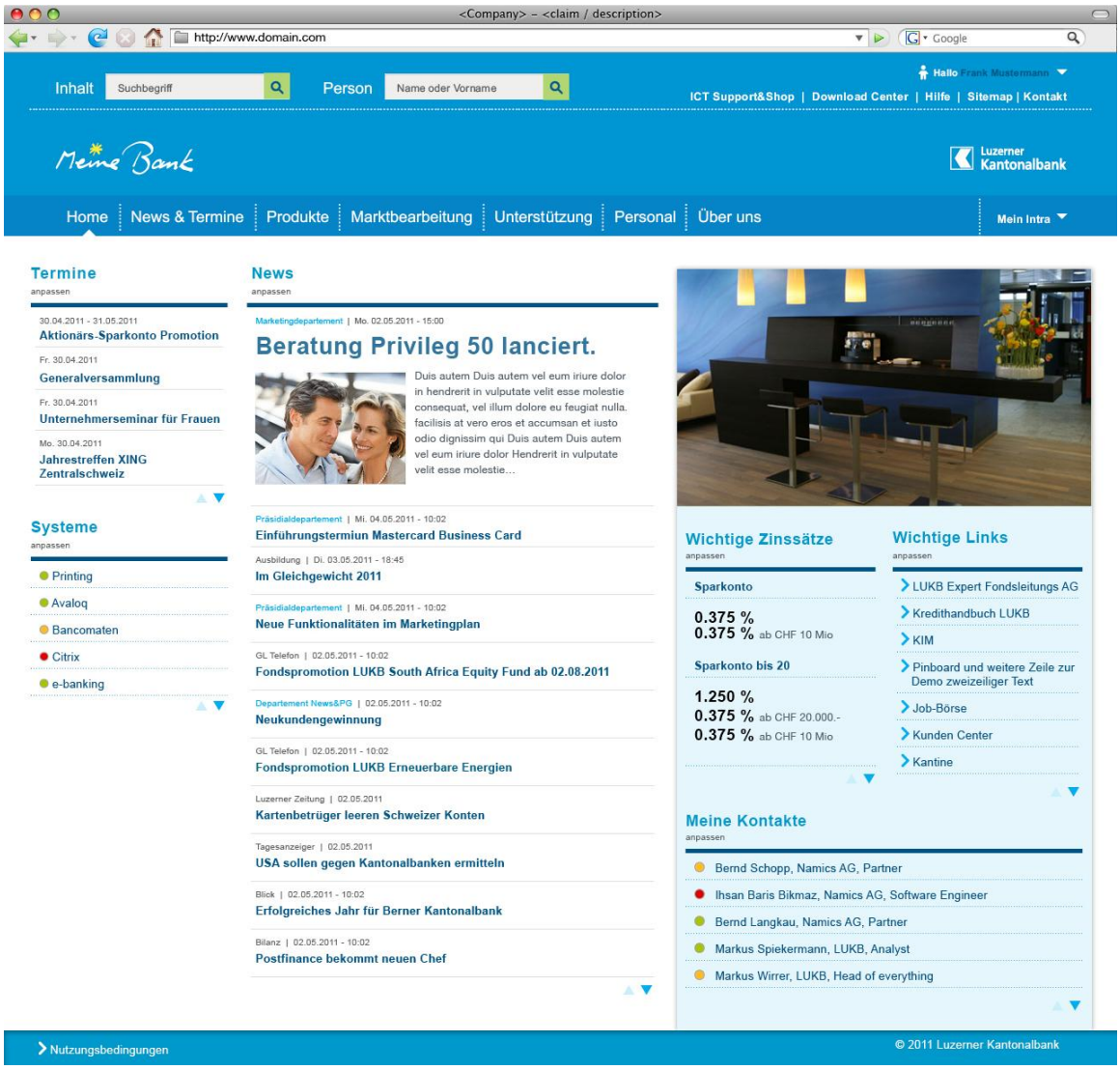
From these wireframes, the Namics team generated a clickable HTML-prototype that it could present and discuss as a basis for the new intranet. The pitch prototype gave the LUKB team a good preview of possible new functionality. The screens below show how the prototypes evolved throughout the workshop process.



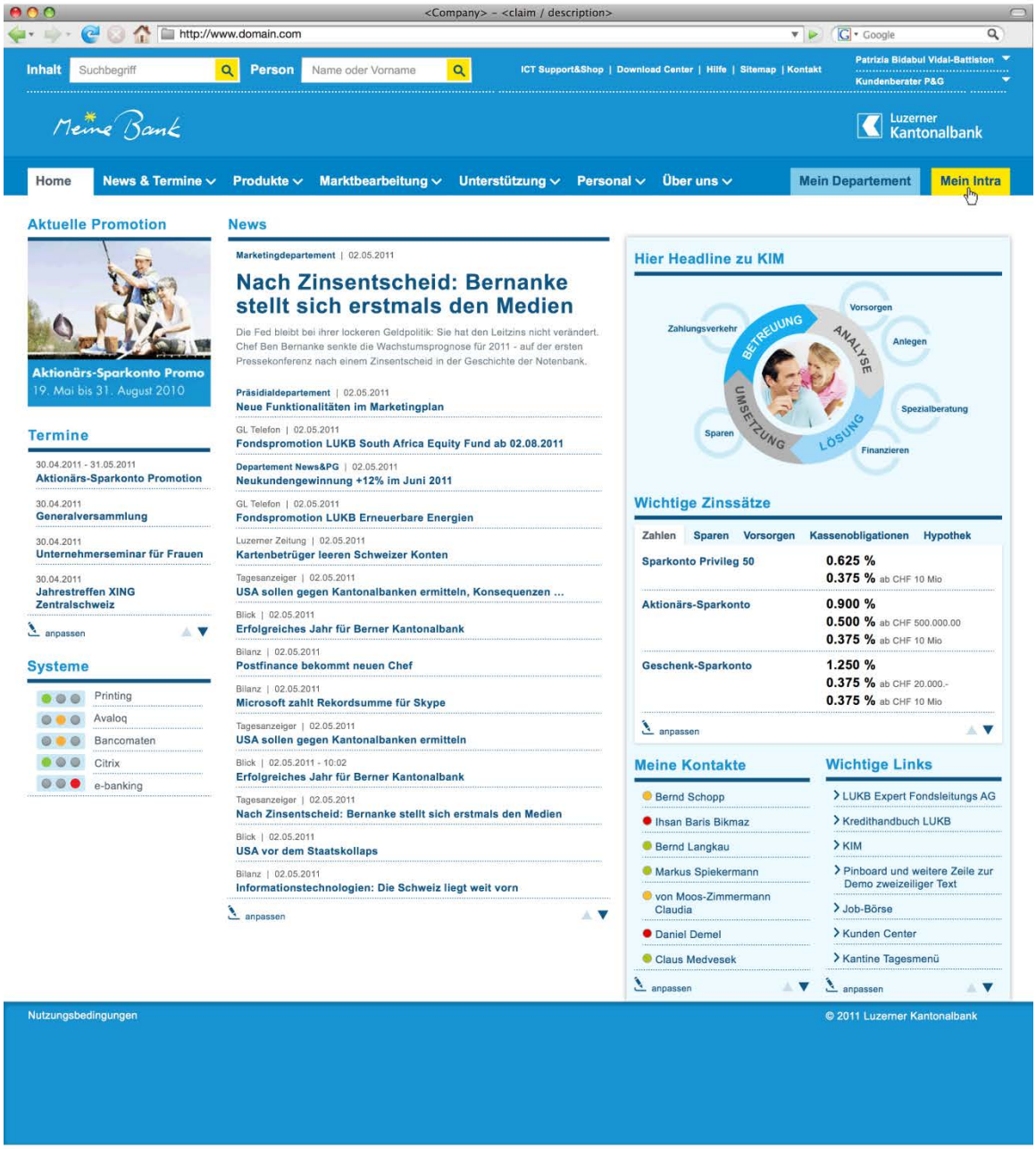
Pictured: After winning the pitch, the Namics team continued to work on the concept in more detail. Over the course of eight workshop sessions, it specified the IA, topic maps, and all other functions and refined the prototype.



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.


<Company> - <claim / description>
http://www.domain.com
Google
Inhalt
Suchbegriff
Person
Name oder Vorname
ICT Support&Shop | Download Center | Hilfe | Sitemap | Kontakt
Patrizia Bidabul Vidal-Battiston
Kundenberater P&G
Meine 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
anpassen
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
Zahlungsverkehr
Vorsorgen
Anlegen
Spezialberatung
Finanzieren
Sparen
BETREUUNG
ANALYSE
LÖSUNG
UMSETZUNG
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
anpassen
Wichtige Links
LUKB Expert Fondsleitungs 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

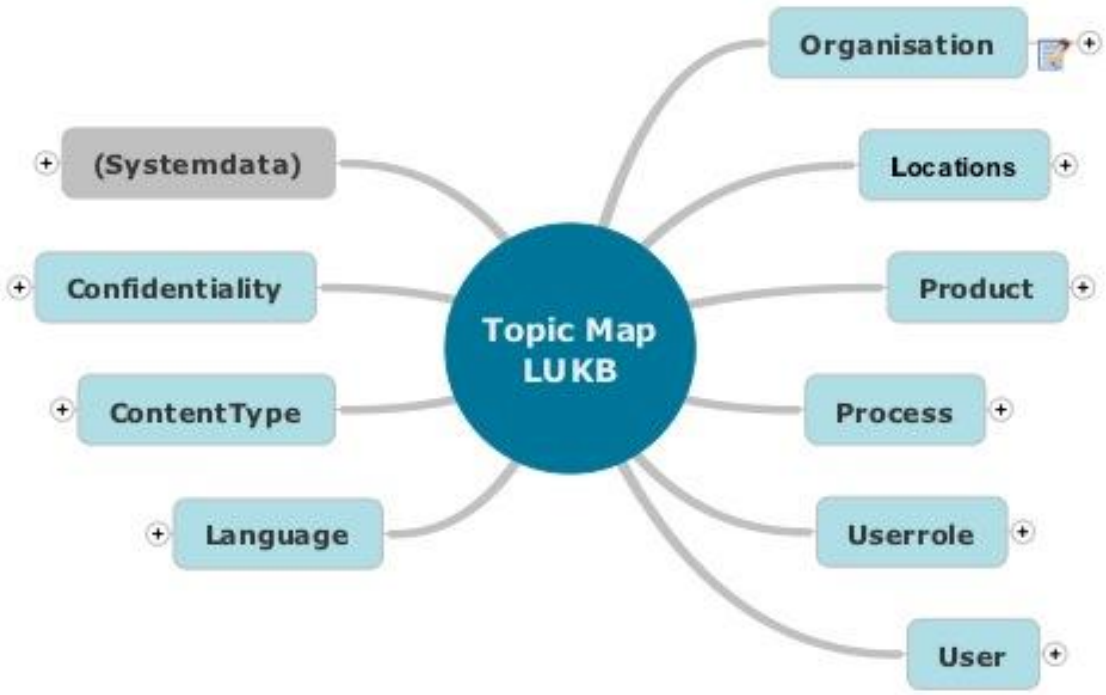
Although SharePoint search powers the intranet, MatchPoint web parts are used for input display, search results, and faceted search. The team chose MatchPoint because it met the specific requirements to combine metadata and full text search.

"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."

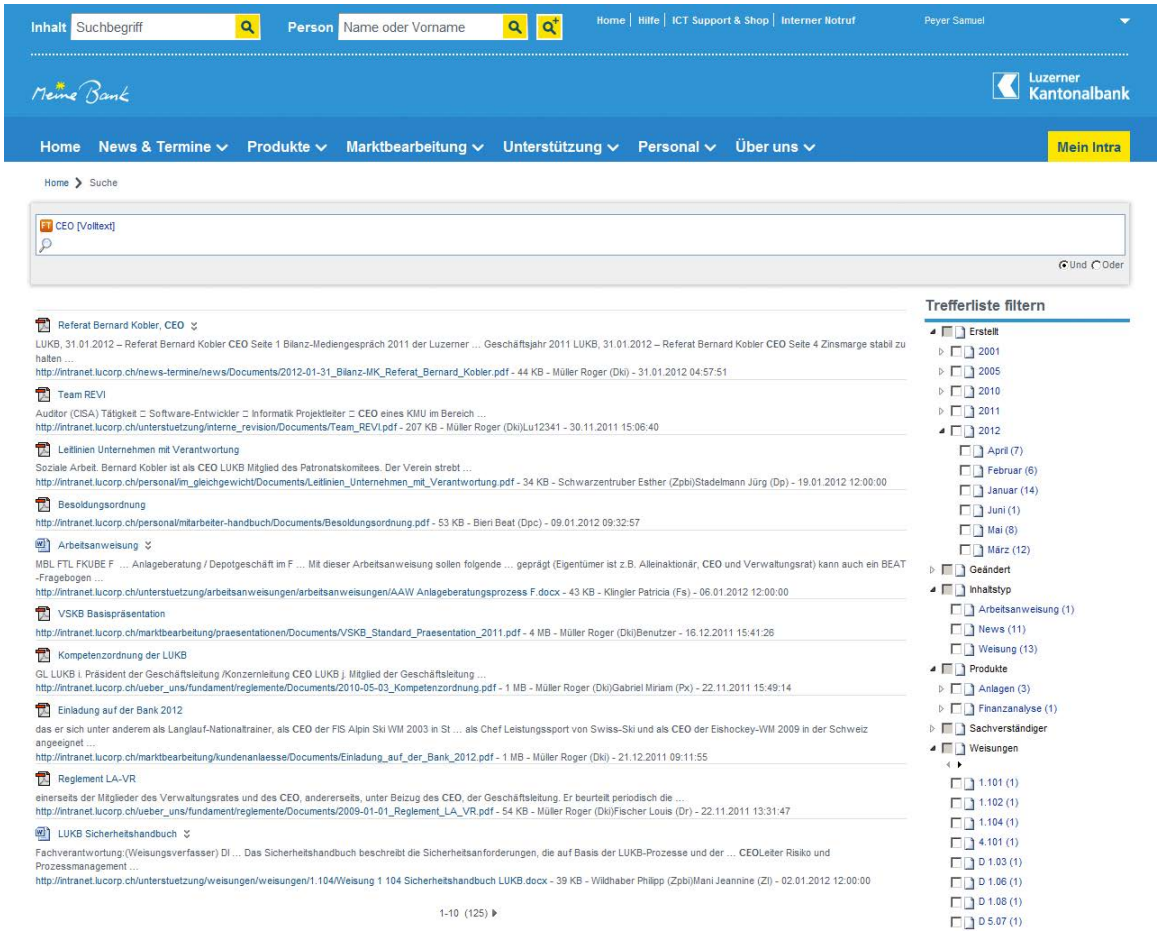
Data from peripheral systems (such as processes, instructions, and interest rates) are imported into the core data model so they can be linked with the intranet content.

"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.



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."

Swiss Mobiliar Insurance & Pensions

Using the intranet: Swiss Mobiliar, founded in Berne in 1826, is the oldest private insurer in Switzerland. The Group's product range extends from property, liability, and vehicle, to life insurance. An all-line insurer, Swiss Mobiliar is the market leader in Switzerland for household contents, business, and pure risk health and life insurance, as well as for the reinsurance of pension funds. Around 1.5 million people currently count on Swiss Mobiliar for their insurance needs.

Headquarters: Berne, Nylon, and Zurich, Switzerland

Number of employees the intranet supports: 4,400

Company locations: Operates in Switzerland and Fürstentum Liechtenstein

Premium volume: Swiss Francs 3.2 billion (2011)

Design team:
The in-house core team did most of the work on the intranet, with support from soultank AG (usability and UX) and Nose Design AG (interface design). The technical implementation was handled mainly by Infocentric Research AG in close cooperation with internal IT.

In-house core team (Marketing/E-Services): Klaus Volken, Project Sponsor and Marketing Director; Martin Doriot, Head of E-Services; Björn Böller, Project Manager, "Re-Launch RedNet," and Intranet Manager; Franziska Buchenhorner, Content Master Intranet; Pia Gueblaoui, Content Publisher; Carole Scheurer, Content Publisher; Fabian Buser, Content Publisher; and Karin Simmen, Interaction Designer

In-house corporate communications: Evelyne Koller, Head of Planning & Services; Kurt Messerli, Head of Media & Consulting; Jürg Thalmann, Editor
In-house IT: Jean-Marc Leutenegger, Head of Stream "Market Management"; Gregor Koller, Technical Project Manager; Adalbert Schwalb, IT Product Manager; Giuseppe Marino, Head of SMM Web; Pascal Graf, Developer; Simon Ma, Developer; Vladimir Vasic, Test Manager; Sandra Wüst, System Specialist; Hans Werner, System Specialist; Christian Schmid, IT Architect; Lars Welti, Telematics Specialist; and Martin Zollet, Telematics Specialist

External—Interface Design and UX: Marcel Uhr, soultank AG; Nele Eckstein and Lydia Passon, NOSE Design AG

External—Technology: Daniel Udatny, Bernfried Howe, and Burkhard Pauli, Infocentric Research; Elio Zampieri, DTI Management AG

SUMMARY

Not every intranet team has a goal to create a "joyful" experience for users. But the team at Swiss Mobiliar recognized the importance of an enjoyable user experience and of keeping usability and user experience in the forefront when approaching its most recent major site redesign.

With a massive increase in content over an eight-year span on top of outdated underlying technology, it was time for a change. The team was looking for a complete overhaul of the web infrastructure, and the addition of personalization was essential for the project.

The site supports 4,400 employees located in Switzerland and Liechtenstein. Employees are dispersed across three different headquarters locations and 80 agencies. Employees are located in all three language regions in Switzerland, and the site supports content in the three corporate languages: German, French, and Italian.

Employees at the agencies use the intranet for their day-to-day jobs, getting product and training information, and even booking hospitality events for local customers through the site.

Headquarters employees use the site differently than agency employees, accessing applications, forms, and databases, as well as social content. The Nyon headquarters is focused on customer service, so users there use the site primarily to meet customers' needs.

With different offices using the site for different reasons, intranet team members needed to know as much as they could about their users. They started with contextual inquiries so they could understand user needs and create requirements, did early wireframe reviews to make sure they were on the right track, and conducted in-person usability testing sessions to fine-tune designs.

Beyond the usability-related processes, however, the team also kept the idea of a good user experience in mind. Team members wanted to give the users a joyful experience; they saw no reason that an intranet couldn't be as enjoyable to use as any other site. They fought to make the user experience a valued part of the project because they wanted every user to not only be able to find information and complete tasks, but also to enjoy using the site. This emphasis on the full experience is shown in the attention paid to small details, such as rounded corners, drop shadows, and icon and button design.

One of the biggest changes to the site was to add personalization and customization. The previous site was cluttered with information intended for different audiences, making it extremely difficult for users to find anything of interest. The information was the same for all users and tended to be headquarters-centric, alienating those employees working at agencies; if users even bothered to read the news, half of it was irrelevant to them.

The new homepage nicely reflects the move to personalization and customization. The team wanted to give users some control over their intranet experience, but without overwhelming them with options. As such, some content, such as mandatory corporate-level information, is pushed to users based on their identity; some is pushed based on role, via default department-level information; and some information, such as *Favorites*, is specific to the individual.

All personalized elements throughout the site follow the same pattern of mandatory, default, or open. Mandatory content cannot be changed. Default content automatically appears for users, but can be edited. And open content is available for employees to add.

During development, content managers worked with management to select which news, applications, and widgets were mandatory and which were default (meaning they could be removed or edited). This resulted in 36 different profiles being administered via the CMS. These profiles are regularly reviewed to make sure they continue to meet users' needs. The HR department also informs the intranet team of any organizational changes, so they can change the profiles as appropriate.

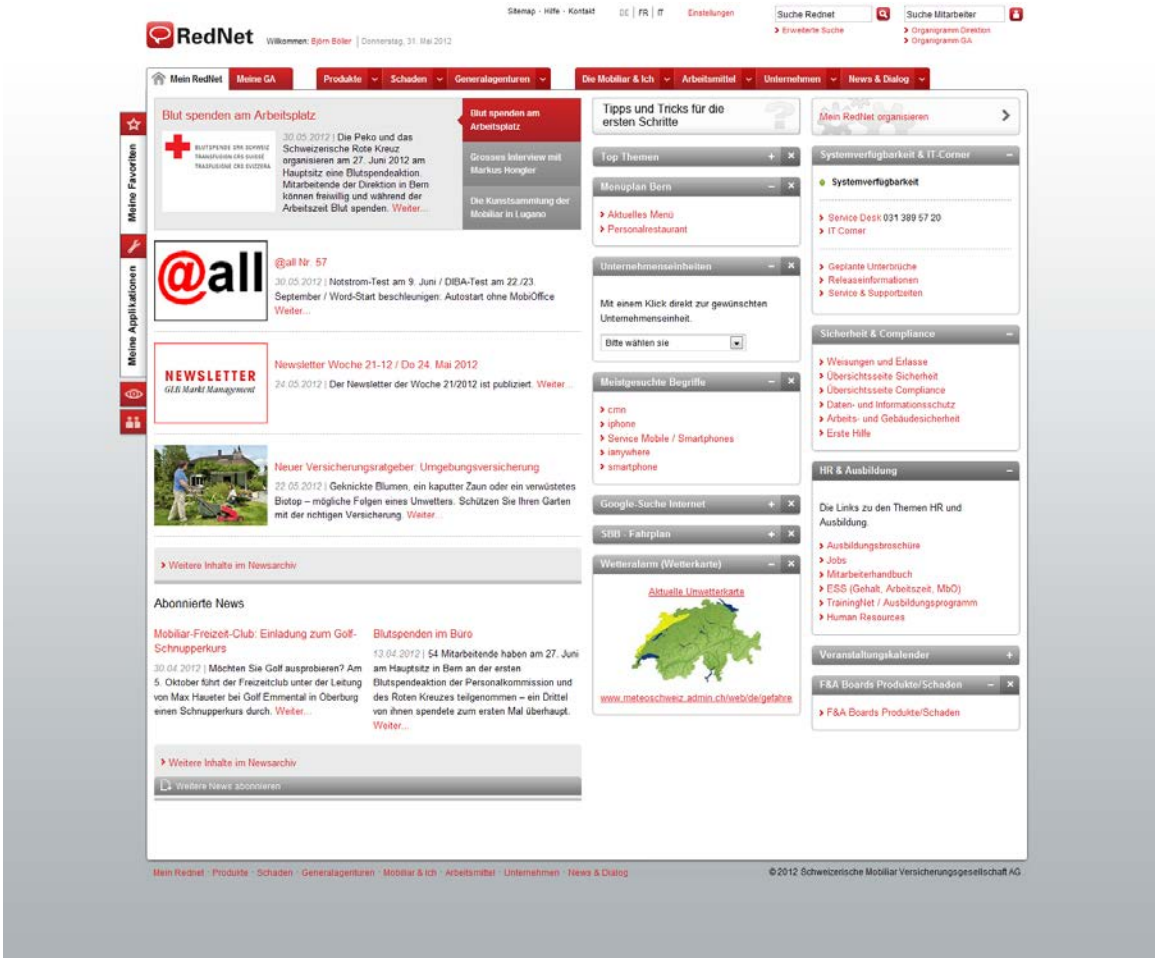
The homepage includes company news, news channels, and subscribed news. Company news, which is mandatory and appears for all employees, is presented in a carousel. The carousel uses text headlines, which lets users see all content at once. Many carousels force users to wait for an animation or click to see the next item. Listing headlines next to the carousel imagery gives users better control, as they can navigate directly to the content they want to view, as well as quickly see all the items on the carousel.

The *News Channel Section* is department-specific. Department content managers can select which news channels are shown to employees by default, and these headlines appear under *Mobiliar News*. Users can customize news subscriptions and the widgets that appear on the right side of the page.

The homepage uses a three-column design, with one wider column and two narrower columns. The team knew that all employees at the company used widescreen

monitors, so they could design for a wider display and accommodate more content without sacrificing legibility. All employee monitors are at least 1280p resolution.

Red is a corporate color and is used throughout the site. It generally has a strong enough color contrast with the background to be legible. The use of the bright color doesn't feel as overwhelming as it might otherwise, because the site doesn't feature a wide array of colors. Most of the content is presented in black, gray, white, or red.

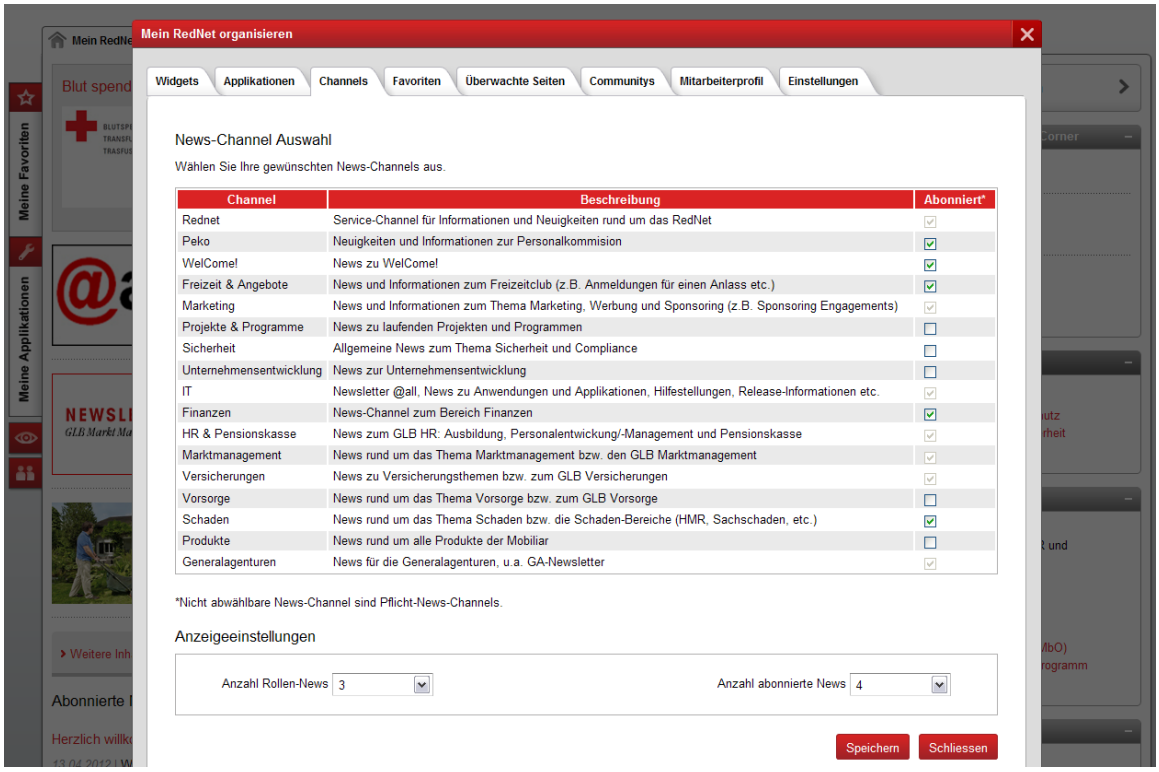


Pictured: The homepage is designed for widescreen monitors, which all employees have. Content is personalized for and customizable by users.

Users can add or edit news subscriptions via the *Mein RedNet organisieren* (*Organize My RedNet*) links, which lead to the *Channels* screen. Some content is mandatory and cannot be removed; this is indicated by a grayed-out box.

This flexibility allows employees to find the news that is most interesting to them. Although content managers select channels for each profile type, users can edit and refine those selections.

The same *Organize My RedNet* window is used for all customization options on the site.

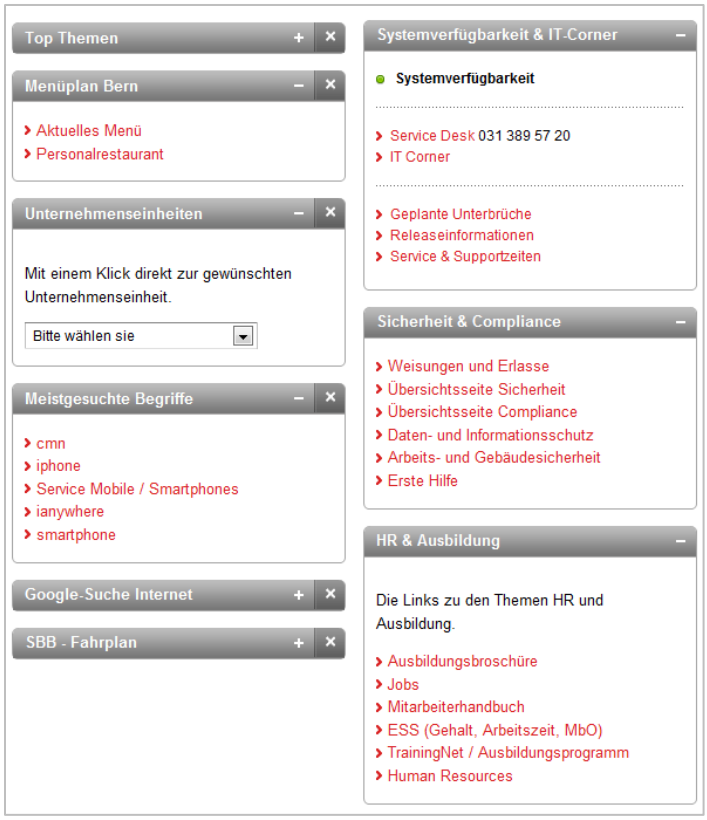


Pictured: Users can select news subscriptions via the *Organize My RedNet* link. Grayed-out options indicate that the content is mandatory for the user.

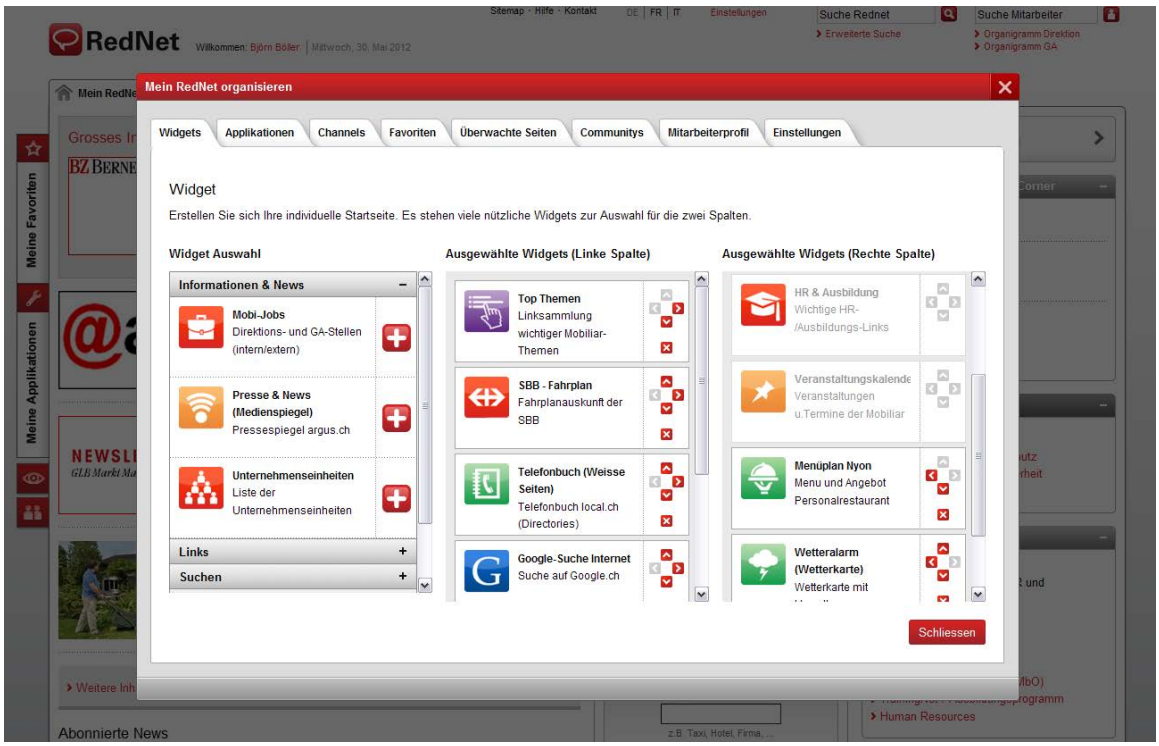
A set of personalized widgets appear on the right side of the page. These widgets contain useful bits of content or information, such as train schedules, saved searches, or lists of links. As with news items, some widgets are mandatory—such as IT system status updates—while others appear by default but can be removed by the user. Users can organize widgets via the same method used to customize news subscriptions.

On-screen widgets can be minimized or maximized by the user. At the user's next launch of the site, those preferences are retained.

One of the main reasons the team included widgets was because the previous site offered a lot of information, much of which was interesting or appropriate for only a small subset of users. Widgets offer an elegant solution for what to do with this content. Groups or teams needing or wanting the content can now access it, but it no longer clutters other employees' pages or interferes with their use of the site.



Pictured: Customizable widgets provide quick access to information on the homepage.



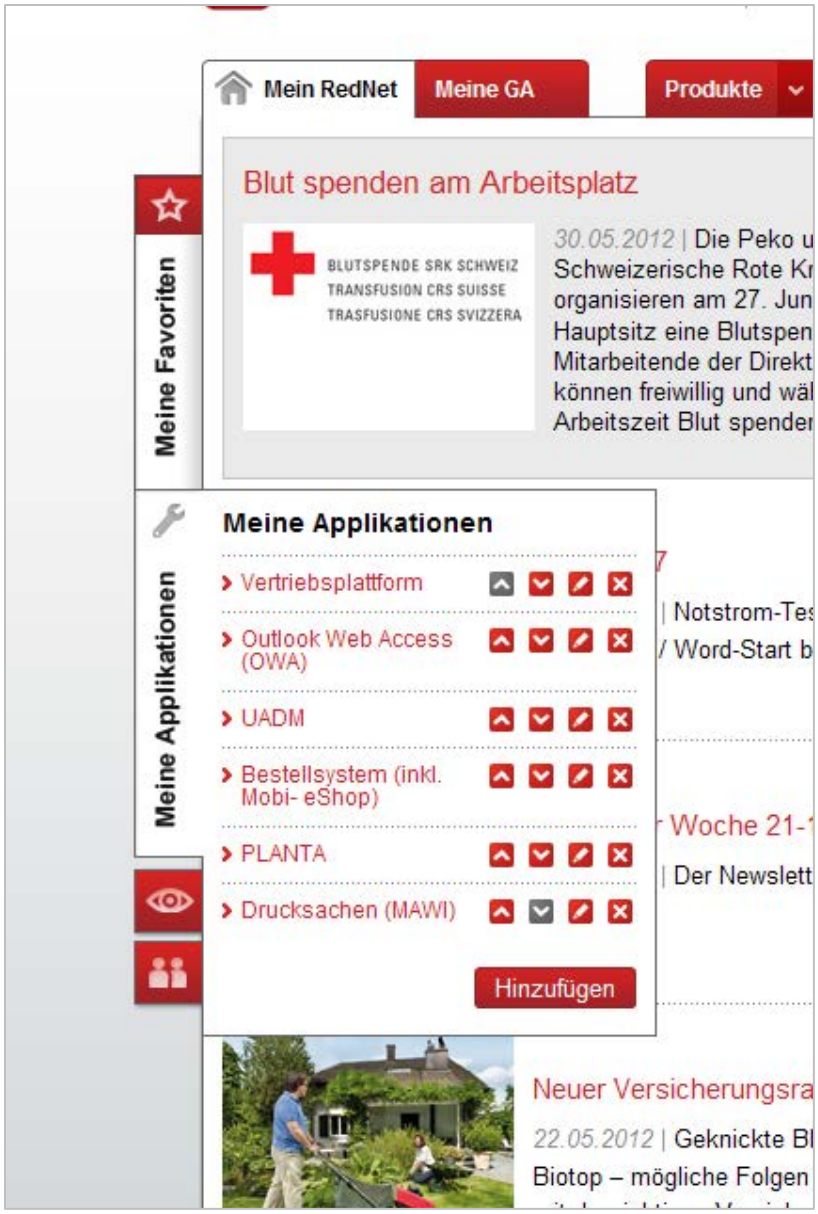
Pictured: Users can select widgets and edit their placement on the page. Arrows let users move an item to another column or move it higher or lower in a list.

The site uses flyouts on the left side of each page. This gives users consistent and quick access to several content areas, including *My Applications*, *My Favorites*, *My Watched Pages*, and *My Communities*.

Users can promote or demote items in the list with up and down arrows, edit the link via an edit icon, or remove a link using the *X*.

In the *Applications* area, employees can add applications to their list, which appear alongside any mandatory application links. Departments can also set applications as default, rather than mandatory, so that they appear automatically but can be removed. Applications can be accessed via this shortcut or via the main site navigation. The site's *Tools* section contains approximately 60 applications.

Favorites can be added via a link in the footer of each page. Users can add a page to their list of watched pages in the same way. "Watching" a page means that the user will receive a notification if any content on the page changes. Community links give users quick access to relevant community pages on the site.

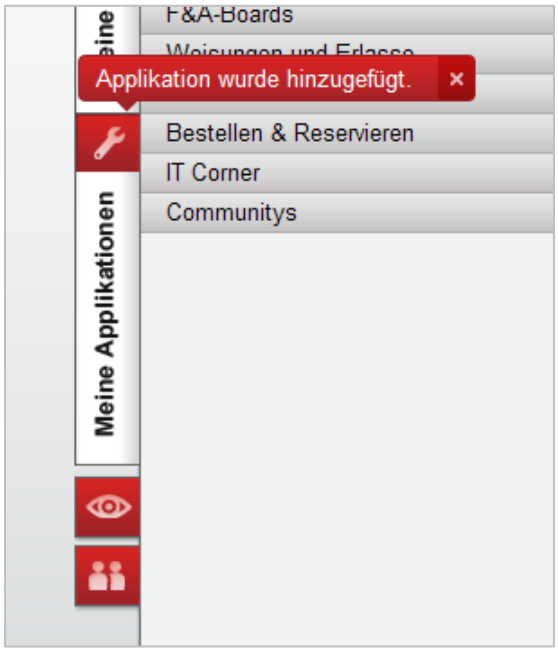


Pictured: Flyout menus on the left side of each page give users quick access to content. The *My Applications* menu is shown above, with a user's customizable list of applications.

One of the site's small details is its use of notifications, which appear like speech bubbles when there is a system or user-generated change to a user's content. For instance, if users add an item as a favorite, a bubble appears above the flyout on the left side saying an article has been added. If users are invited to join a community, a speech bubble appears next to their community menu telling them that their membership has changed. If new widgets are available, a bubble informs them of the change.

Implementing this feature was complex, but the team felt strongly that it was needed to give users feedback about changes. This reassures users that their actions have been taken, as well as alerting them to any changes to their customized

content. Further, notifications of system updates educate new users about the existence and use of the flyout menus and their content.



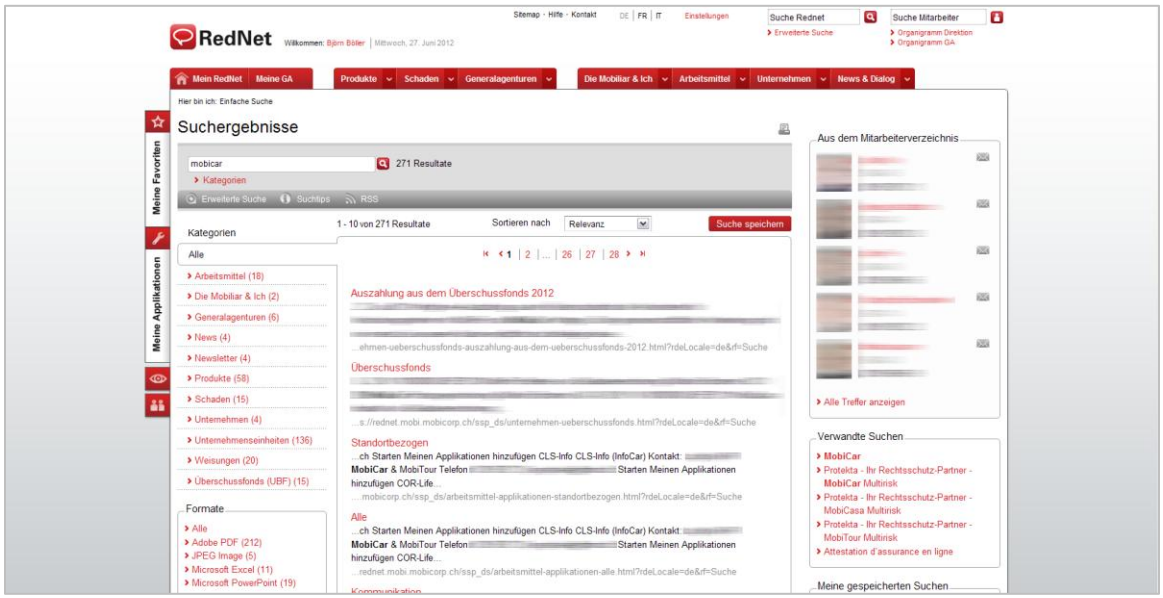


Pictured: The two screens above show how the site notifies users of system changes or responses to user-generated changes (such as adding a favorite). These notifications appear as speech bubbles near the relevant flyout menu.

As is the case on many intranets, users were unhappy with the existing intranet search. The team changed to a faceted search to show all categories on the left side, with subcategories visible when a category is selected. A central taxonomy is based on the navigational structure. Every piece of content added to the site—whether it's a content page, PDF, or news story—must be tagged in the CMS with the appropriate terms. The tags are mandatory: without a tag, content can't be published.

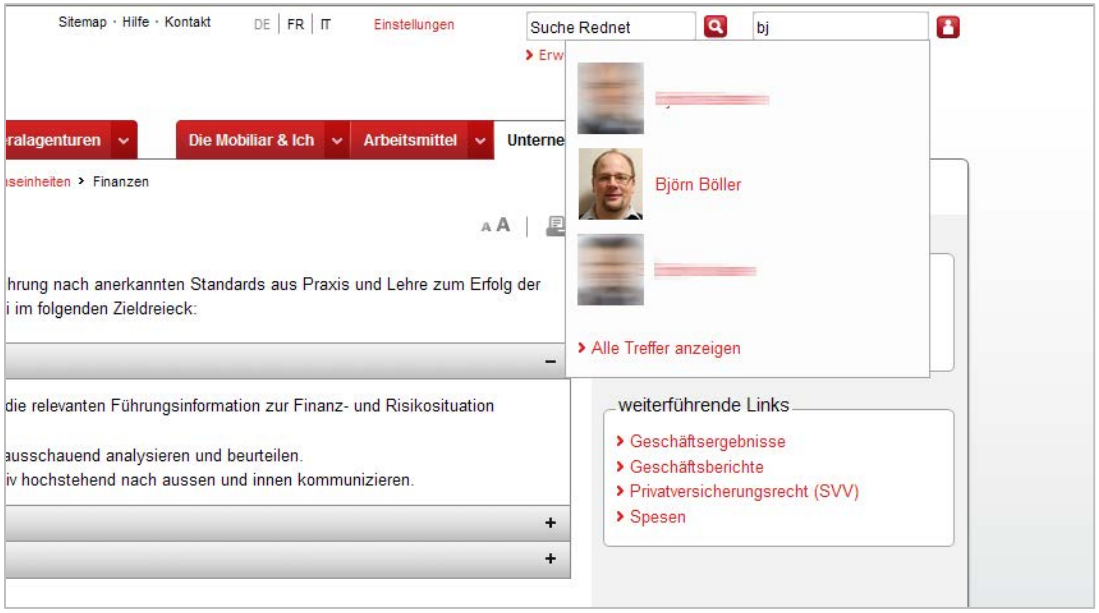
Site results appear in the center of the page. A list of employees who match the search query appear on the right side of the page, followed by related searches and

saved searches. Each search query can be saved and appears under the user's list of favorites.



Pictured: Faceted search helps users get to the result they need more quickly. Employee matches are pulled out and listed on the side of the page.

Employees can find their colleagues via the site search, as shown above, or the employee directory. In the employee search, a type-ahead feature lets users see results and accompanying pictures as they type their queries.



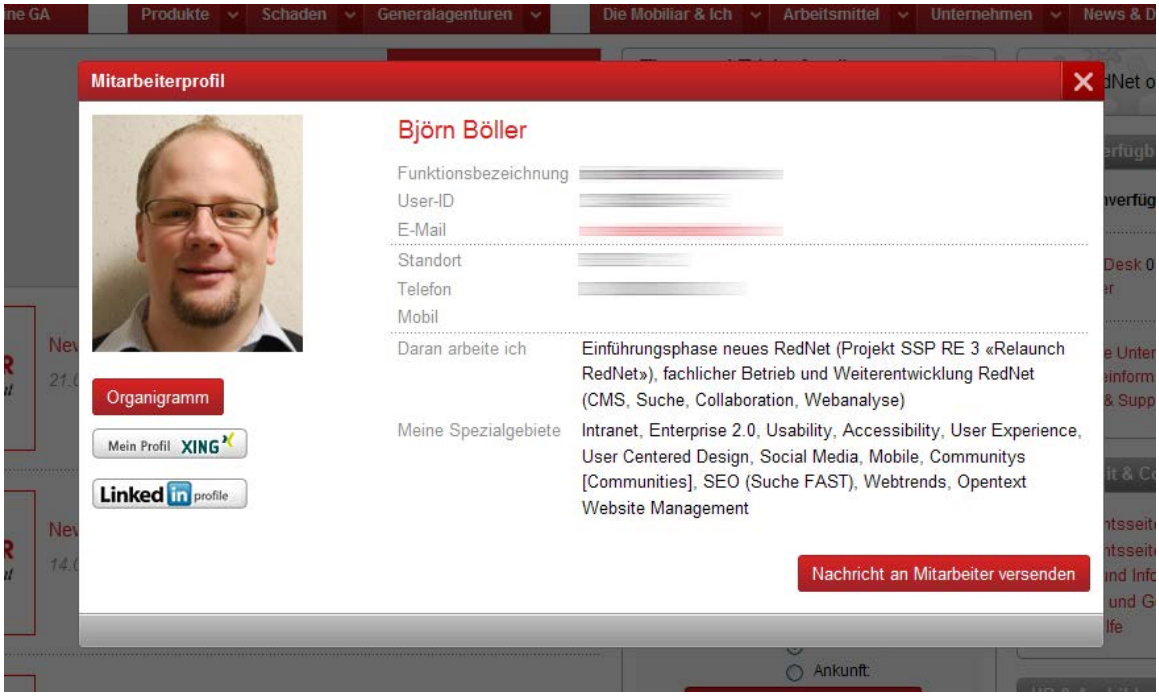
Pictured: The team receives positive feedback about the type-ahead feature in the employee search. Employees also appreciate seeing profile pictures in the results.

Data in the employee directory comes from the central *Active Directory*, but employees can also add their own details, such as projects and skills. The addition of these details allows the search to move beyond a simple employee search and instead function as an expert search. Employees can search for a keyword or skill, rather than an employee name, and receive a list of colleagues with that expertise.

This information is also indexed by the standard site search. If someone searches for a keyword, the search results page includes employee results that match with that term (as shown in the screenshot above). This is the first step in what the team calls "Find An Expert," a way to connect content with people. However, for this to work well, employees need to maintain their user profiles and add skills and interests.

To make it easier for users to add information to their profiles, the site lets them link to an external LinkedIn or Xing profile. To help people find experts, all user information, regardless of source, is searchable by the intranet search and the employee directory search.

Employee profile pages include an image and standard contact information, as well as skills and projects and an organizational chart view.



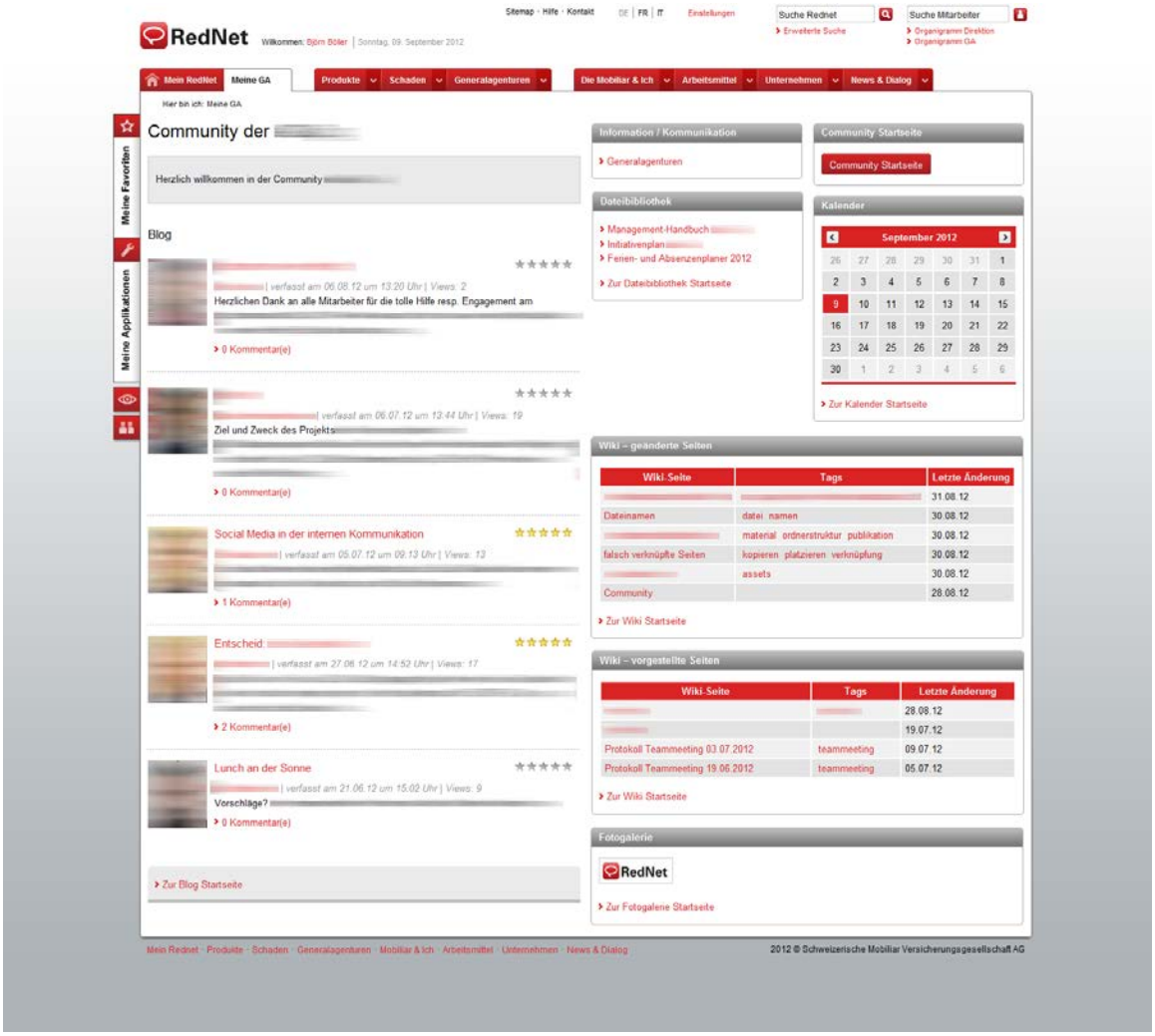
Pictured: Users can edit employee profile information, adding skills and projects; they can also link to their Xing or LinkedIn profiles.

The team wanted to implement collaborative tools not because they're trendy, but because they're useful. They started with minimal features to meet the organization's needs, rather than implementing every type of community feature available.

The team knew that adding community elements to the site would be a cultural change, so they met with top management to ensure they had the support they needed. Each agency decides if it wants a collaborative, community area on the site. If so, an additional tab appears next to *My RedNet* called *Meine GA* (*My GA*), where GA stands for "General Agency." These community areas—which include blogs, wikis,

document upload, photo galleries, and lists of links—are intended to help teams collaborate internally.

All community areas follow the same basic layout. Community managers can ask the team to remove certain features, such as the calendar, if they are not needed.



Pictured: Each agency's management decides if it wants a community or collaborative area on its site. Because collaboration is a cultural change at the organization, it is being rolled out somewhat cautiously.

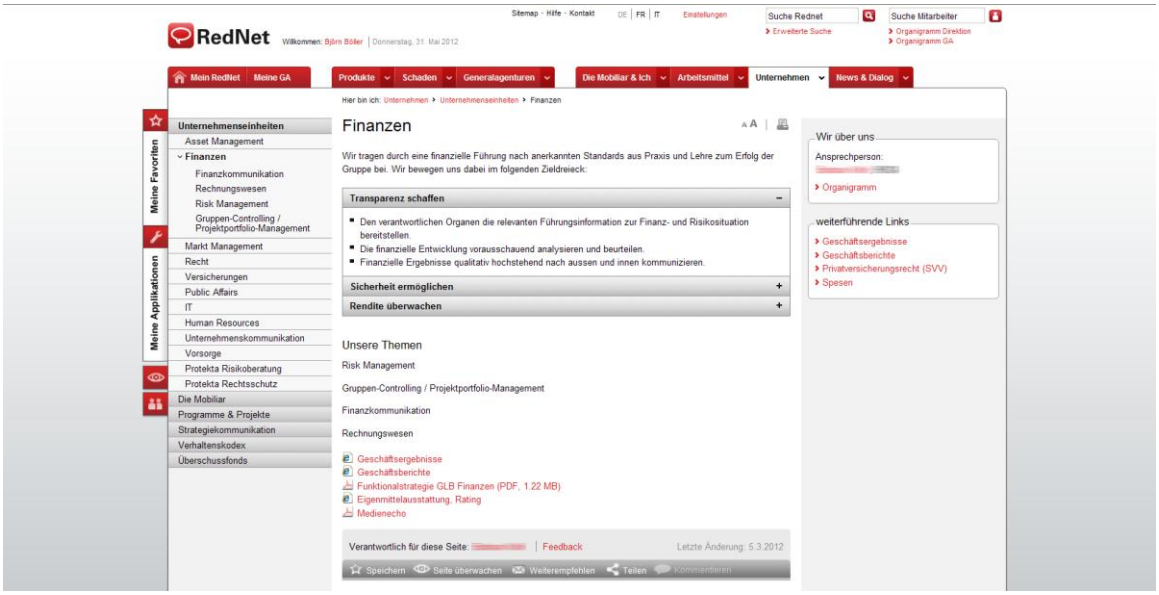
Small touches—such as notifications, expert results in searches, and menus for quick access to personal or changing content—reflect the detailed work the team did to vastly improve the site. The result of all this work is a site that streamlines information for employees.

BACKGROUND

Over time, the use of RedNet shifted from an information platform to a working platform/appliance. "After eight years online and a massive increase in content, the 'old' RedNet was just not designed for future requirements," says Klaus Volken, Project Sponsor and Marketing Director. "We always compared our old RedNet with a

used compact car. You can buy new spare parts, tune the engine, add a new car radio (maybe even with GPS receiver), but you will never get a modern SUV out of it."

There was a high demand for personalization and individualization. The structure (IA) had grown incrementally over time, and the technology was at the end of its lifecycle. Although these were all good reasons to embark on an upgrade, the spark that ignited the project was the obsolescence of the technology. The entire web infrastructure needed to be replaced. The underlying technology—including the CMS and portal software—was at the end of its lifecycle, so there was also pressure from the technical side. "Together with the business needs, the path for 'RedNet 2.0' was paved," says Volken.



Pictured: The top-level navigation consists of a maximum of eight different tabs. *Meine GA* (*My GA*) appears only for employees who belong to an agency that has an agency community. The mega drop-down with all second- and third-level navigation items appears on mouseover.

Further highlights of the new design include the mega drop-down menu, built to address the project's IA needs, and the *Meine GA* (*My GA*) communities, which introduced a social element to the intranet.

- **Mega menu:** Designing the mega menu was challenging. "At the end of the design process, we almost passed through 10 different versions of the drop-down," says Böller. A mega drop-down is an ideal tool for sites with lots of content, but only when the different navigation levels are obvious to users. This clarity is not always easy to achieve. The most obvious challenge is fitting in everything that needs to be in the mega menu without overwhelming users. So, everything had to be accommodated. "The high demands on usability and user experience were a challenge for the technical implementation, but thanks to the effort of several specialists we were able to satisfy the high expectations and Mobiliar's goals could be reached," says Udatny.

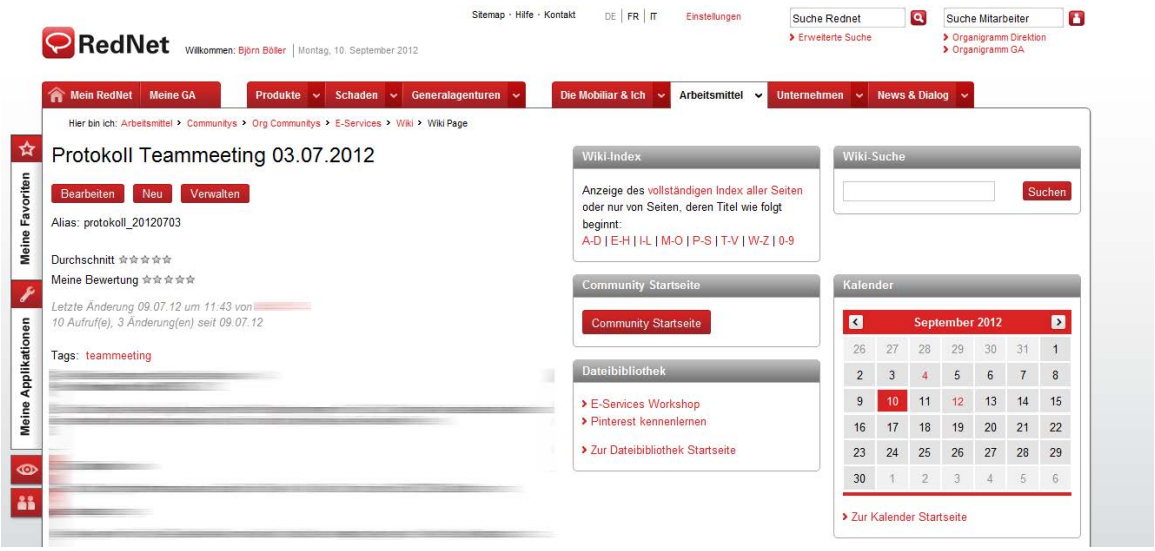


Pictured: The mega drop-down, with all level two and three navigation items, appears on mouseover. The number of columns—which ranges from one to four—can be set in the CMS.

- ***My GA*:** The introduction of the new site's community element, *My GA,* was agreed to only after deliberation. The company wasn't interested in just jumping on the social software bandwagon; it wanted to introduce social elements with a strong business purpose. "We did not implement tons of features, only those our employees really need," says Volken.

  "The challenge with introducing social communities in a company lies not (only) in implementing a new technology, the cultural change has far more impact on the company and its employees," he says. Therefore, it is a management decision, which is why Mobiliar's intranet team discussed pros and cons with the top management.

  Further, the company lets each agency decide whether it wants its own collaboration platform. If so, an additional tab appears next to *Mein RedNet* (*My RedNet*). The *Meine GA* (*My GA*) consists of a blog, wiki, document upload, photo gallery, and link lists. With these functionalities, agencies can collaborate internally but still stay within the intranet environment.



Pictured: All community functions open on the left side, while all other features are on the right. Additional features—such as a wiki index or search—always appear on the top right side, above the other functions. This placement and the order of boxes (functions) is not yet ideal in terms of usability; the team plans to change it in the near future.

Goals

The team laid out four main areas in which to focus its efforts for the relaunch:

- **Usability and UX enhancements (including new IA):** The IA had grown—but without any clear direction or structure—and the look of the site was dated. "The appearance was rather old-fashioned and dusty," says Björn Böller, RedNet Re-launch Project Manager. "Frankly speaking, the look was more of a website from the late '90s.

  "When I introduced UX to Mobiliar, some people argued that I should bear in mind that we are in a work environment and there is no space for 'fancy' stuff," he says. "Being tenacious helped me to deliver the message over and over again: UX is not about fanciness, it supports the user in their everyday tasks. The intranet should also be joyful; it encourages employees to work with it."

- **Restructuring search:** The existing search just wasn't effective. "Our users always complained that they cannot find what they are looking for," says Böller. "When we interviewed our staff, the same thing always came up: 'Why not buy another search engine? Obviously, the current one does not do its job.' This would have been too easy. It was not (only) about technology, content quality—no metadata, etc.—was the real problem. Therefore, our goal was to enhance content quality *and* technology."

- **Introduction of communities (to foster employee collaboration):** "When we started the project, we only knew that we wanted to introduce Web 2.0 to our employees," says Böller. "But we did not have a detailed plan. Before the actual project started, we did surveys and conducted interviews. Therefore, we knew that there was a demand for such functions. But we did not know it exactly, so it was an evolution during the project."
- **Personalization:** "The old RedNet was a one-size-fits all approach and headquarters-oriented," says Franziska Buchenhorner, Content Master Intranet. "People from our agencies saw exactly the same news as employees in our headquarters. About 50 percent of the published news did not reach the right recipient. It wasn't that they were not allowed to read that news, but it was an unnecessary information flood. So, our main focus in the project was on personalization (and 'individualization')."

Challenges

The team faced two main challenges:

- **Content migration:** Content migration is never easy, but technical difficulties can wreck havoc on a smooth migration. "We shifted all content manually from our former CMS into our new one, Opentext Website Management (OTWM)," says Buchenhorner. "We began with content migration while the CMS was not fully developed—some 'content classes' (templates or fragments in OTWM) were not ready by the time we shifted content. So, we had to touch some of the content pages several times, which was very time consuming and sometimes also nerve racking."

  The result was a two-month delay in achieving the full migration; content migration was completed just in the nick of time for re-launch.
- **Personalization:** Understanding the full impact of a personalization approach is critical before forging ahead with the plan; the Swiss Mobiliar team found this out the hard way. "Initially, we started with a far more granular level of personalization," says Böller. "Soon, we realized that it would not be manageable by our team and our users would not understand it. We lost some valuable time by going back one step to make it simpler."

INTRANET TEAM



Pictured: The RedNet intranet team (top photo, left to right): Fabian Buser, Björn Böller, Franziska Buchenhorner, Martin Doriot, and Klaus Volken; (bottom photo, left to right) Carole Scheurer, Pia Gueblaoui, and Karin Simmen.

GOVERNANCE

Ownership

E-Services (a department within marketing) owns the intranet. E-Services consists of 11 people with various skills (including deep CMS knowledge, web publishing, UX and usability, interface design, and copywriting) who reside somewhere between IT and the business side. "Though," says Martin Doriot, Head of E-Services, "we are clearly on the business side. This makes us very flexible, and we act like a small web agency. In contrast to a 'pure' communications department, we can do more in-house which makes us flexible and independent."

Within the department, the RedNet team is responsible for the intranet. Böller is responsible for the overall intranet, whereas Franziska Buchenhorner, Content Master Intranet, is responsible for all content. The team also has four content publishers.

"It is also important to mention that we work together with the IT department very closely, during the project and now during the ongoing operation of RedNet," says Böller, adding that without the IT team's specific skills, such a complex

implementation would not have been possible. The web development team (within Stream Market Management) also plays a crucial role for all technical implementations outside of the CMS. "With their excellent coding skills and their business focus, they help us to quickly react to requirements from our internal customers, such as forms with workflows or web apps," he says.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Intranet Manager (Björn Böller)	• Manages RedNet's overall operation, including all functionality, widgets, and apps • Serves as counterpart to the IT department • Collects and analyzes web statistics • Monitors search • Guides further development, including specifications and concepts • Manages UX and usability • Supports Enterprise 2.0 (communities)
Content Master Intranet (Franziska Buchenhorner)	• Responsible for all content and news on the RedNet • Coordinates news publishing with the Communications department, Channel Managers, and Content Managers • Publishes content and news • Provides training for Content Publishers
Content Publishers	• Publish content and news on the RedNet
Content Managers (Owners)	• Ensure that content in their department, business unit, or section is up-to-date • Order content publishers to update content
Channel Managers	• Own one or more news channels • Coordinate news publishing with Content Master
Communications Department	• Own all company news • Compose all company news • Decide which news appears when and where (in which news section) • Proofread news from other departments
IT Product Manager (Adalbert Schwalb)	• Manages all technical aspects (problems, incidents, and further development) • Serves as counterpart to the Intranet Manager • Supports the business-side
IT Development Team	• Develops web forms and apps for the RedNet

(SMM Web)	• Maintains Mobidoc (document share)

USERS

Two major groups in the organization use the intranet:

- 80 **agencies** located throughout Switzerland in all language regions (Mobiliar has three official corporate languages: German, French, and Italian)
- Three **headquarters** (Bern is the biggest, with approximately 1,200 employees)

RedNet is the main communication channel for the entire company. Information is not shared by email, but rather is shared exclusively through RedNet. The agencies are fairly homogenous in terms of how they use the intranet. "Our 80 agencies use our intranet most intensively, since 'everything' they need for their workday is on the RedNet," says Böller. And when he says "everything," he really means *everything*.

"When we launched our new RedNet in March 2012, we had some technical difficulties. On the first day, our employees were not able to access the site for about three hours. We were positively surprised by how intensely they really use RedNet. Of course, we knew how important RedNet is, but by this incident, we suddenly realized how critical it is for our personnel to find everything in one single spot."

Employees can find all relevant information about key topics, such as products, sponsorship, and trainings. They can even book hospitality events for their local customers, such as local ice hockey teams or soccer teams in the highest Swiss leagues.

For the three headquarters groups, RedNet is the central hub for accessing applications, forms, employee self-service (SAP), news (personalized), communities (wiki, blogs, etc.), and so on. The second largest headquarters is in Nyon. Use there is different from the other headquarters because Nyon users have direct contact with customers. The agencies there depend on the intranet to get important information and access to applications, which ultimately serves the firm's customers.

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	• https://rednet.mobi.mobicorp.ch or shortcut "rednet"
Default Status	• The intranet is each user's default homepage. It can be changed (for one day) but is reset again every evening.
Remote Access	• All users can access the corporate network from a public PC (or from home) via Citrix if their mobile phone is registered as a "Corporate Mobile Phone" using two-way authentication via SMS text message.

DESIGN PROCESS AND USABILITY WORK

Visiting Users in the Workplace

Before the project even began, the team conducted companywide surveys and usage analysis. "This was mainly done to underpin the known problems, which had existed for quite a while," says Böller. "It also gave us more certainty about which direction the journey should go."

The actual project started in January 2010. And, as a first step, the team conducted contextual inquiries. "We visited several agencies and departments and observed employees and how they worked, with or without the intranet," he says. "Our aim was to understand what they needed in order to do their jobs.

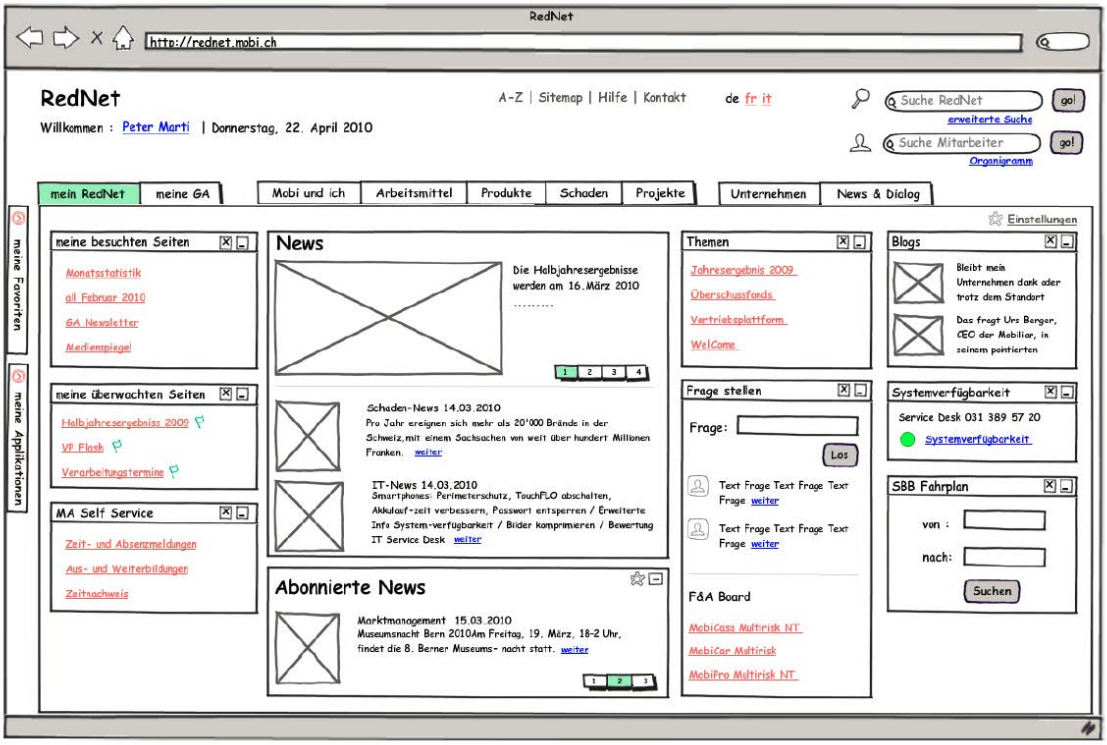
"Some used sticky notes attached to their computer display. Others had a binder on their desk with different papers and important notes," Böller says. "We did not ask them what they needed. They described how it should be and we translated it into requirements. Of course, they did not mention all of the requirements—some we decided to implement solely from our beliefs and our experiences from other intranet projects."

After completing the contextual inquiry phase, the team had a pretty good grasp on the big picture. "With the experience of other intranet projects, Björn and I knew what needed more clarification and what was already clear," says Marcel Uhr, CEO, soultank AG. "Even though every intranet is unique, there are some basic similarities, and some mistakes can be bypassed from the beginning."

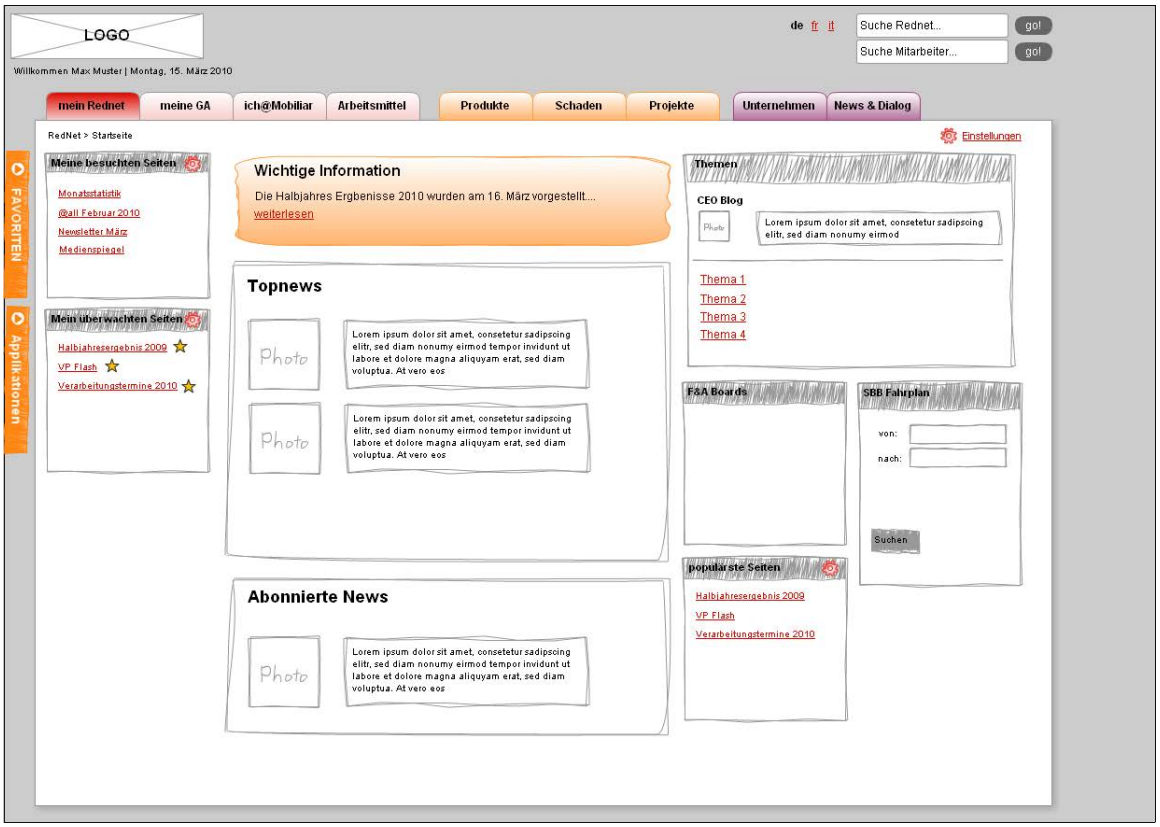
Design and Testing

At the end of each field visit, the team showed some early paper-and-pencil wireframes. "We wanted to involve our staff in the design process as early as possible," says Böller. So, the next step was developing a low-fidelity prototype using Balsamiq Mockups.

The prototypes were rough, but already included some of the proposed functionality.



Pictured: A low-fidelity homepage prototype made with Balsamiq Mockups. The actual prototype is fully clickable.



Pictured: A wireframe of the homepage, used for concept work. Although the team used several different tools, this wireframe was made with Cacoo Diagrams.

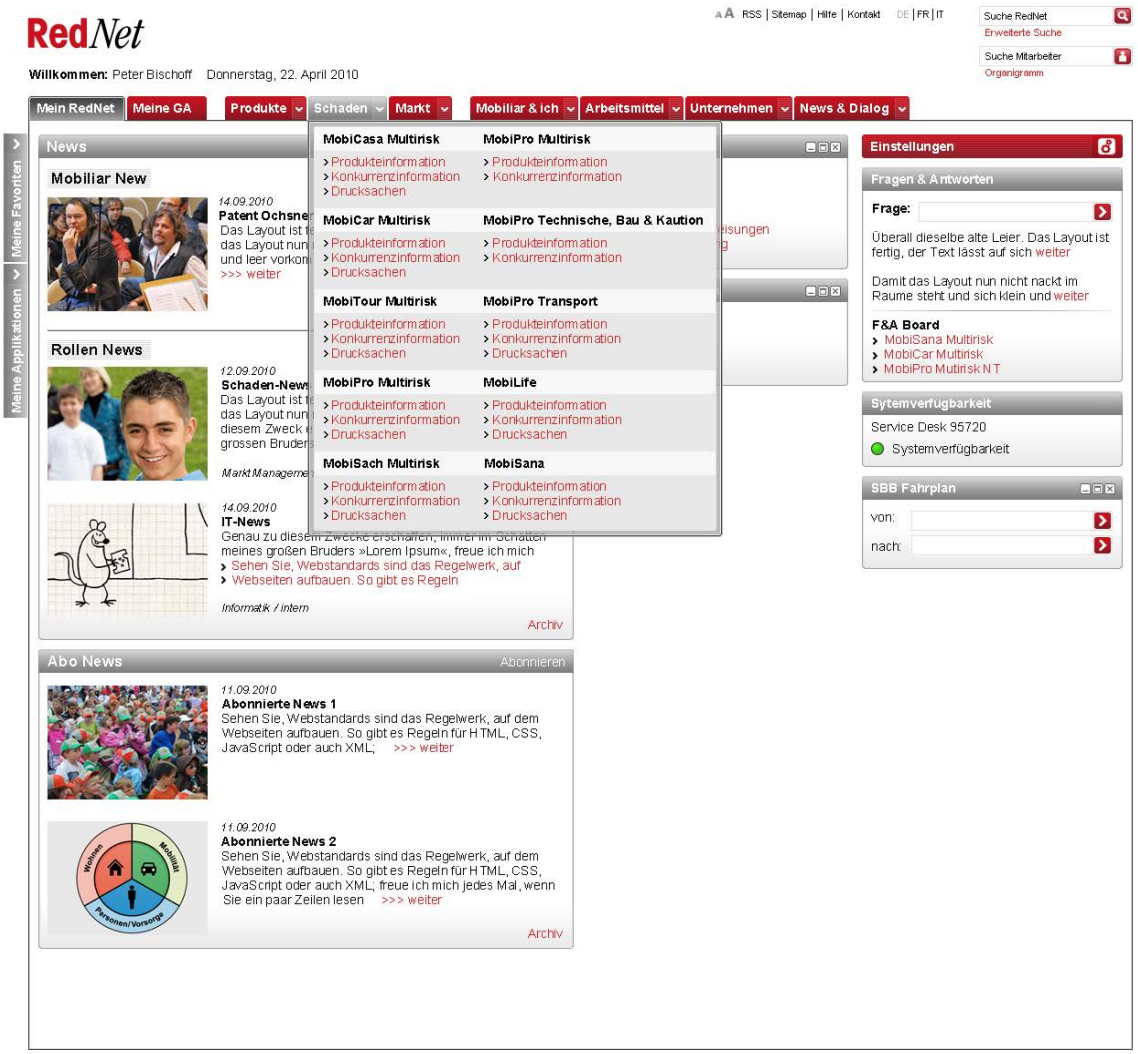
At the time of the wireframe above, the team had yet to start graphical work, so no Photoshop comps had been developed. This changed after completing the first round of user observations. "Our internal interface designer drafted some first mockups, which were adjusted to the existing web style guide from our corporate website," says Böller. "We quickly realized that something was missing."

It turns out that the existing style guide did not cover all of the needed screen elements and was just not quite right for an intranet. "With the introduction of an underlying grid, it was even more impossible to use it," he says. "The problem was that we needed to apply the style guide to a certain extent. The compromise was to use fonts, colors, shades, and proportions from the existing style guide and all the rest could be created anew."

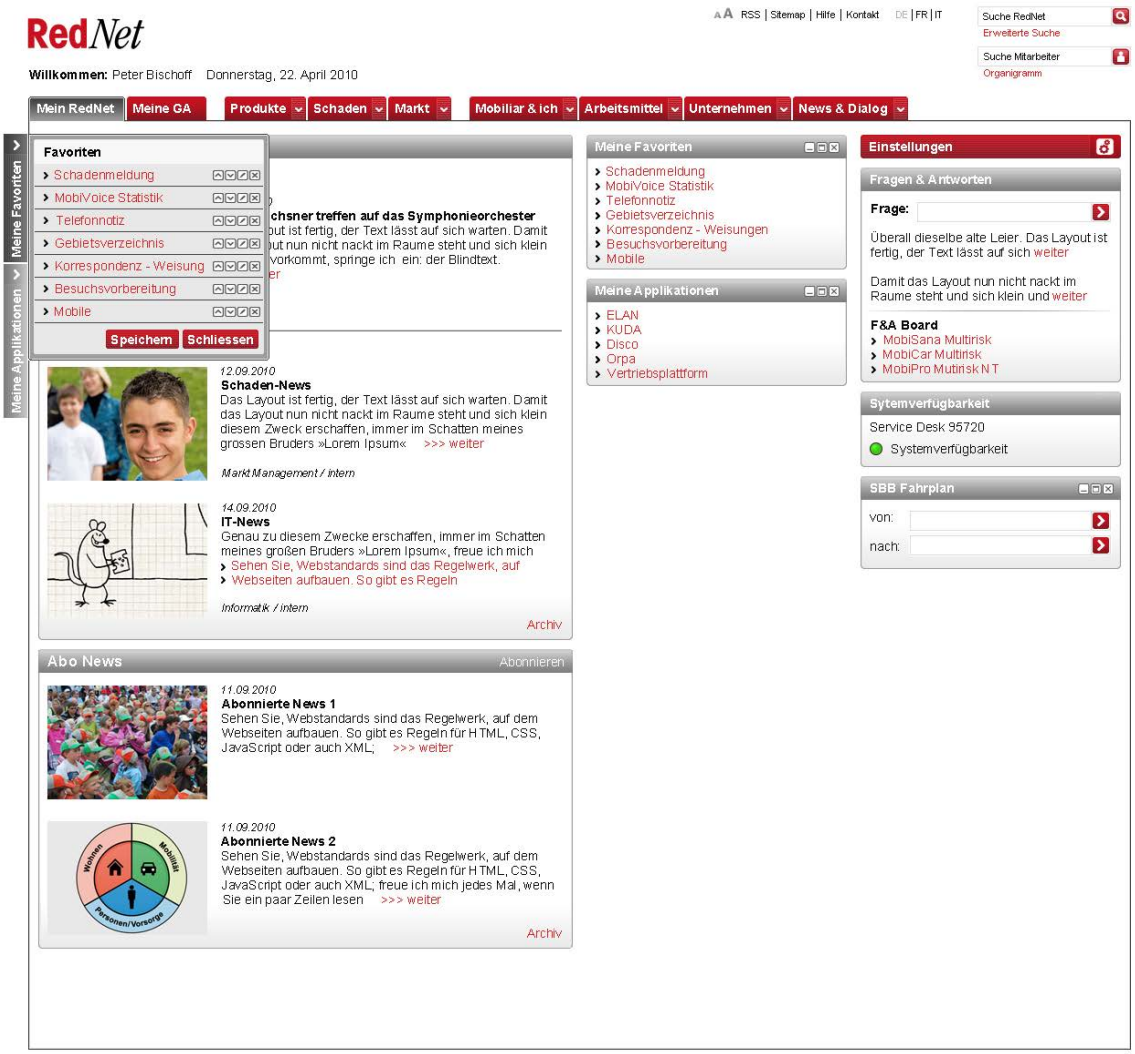
The RedNet team worked with people from NOSE Design to develop the new style guide. "Luckily, they understood what we needed from the first second," says Böller. "It was a challenging job for them, because we had some clear ideas in which direction it should go."

And that direction was all about consistency. "It was all about consistently communicating a strong brand for Mobiliar internally and ensuring maximum flexibility and modularity in terms of layout," says Nele Eckstein, Senior Consultant Interaction Design, NOSE Design AG.

At the same time, soultank AG developed a high-fidelity prototype that soultank and Mobiliar usability tested. All usability tests took place at employees' work locations. The team conducted two iterations of moderated usability tests with about 15 participants each. About two-thirds of the participants were from the agencies, and the rest were from headquarters.

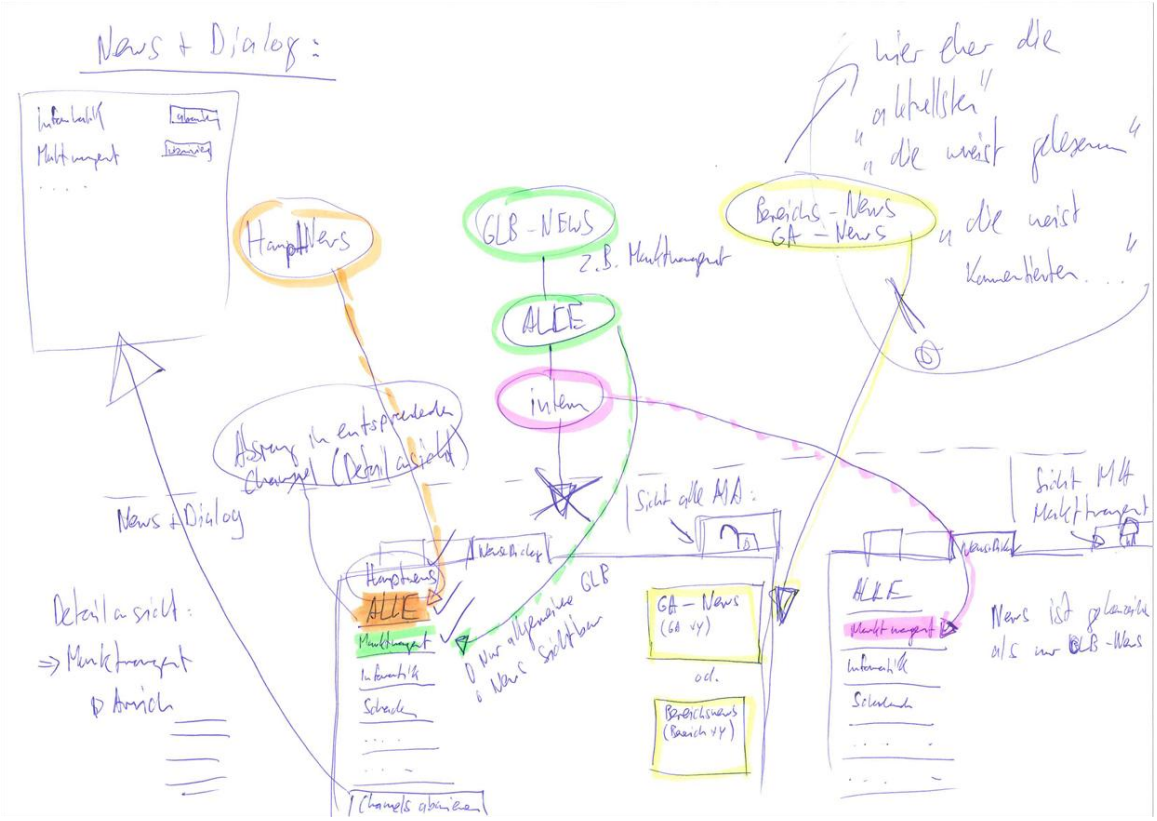


Pictured: A high-fidelity homepage prototype made with Axure. This prototype shows the first version of the mega drop-down.

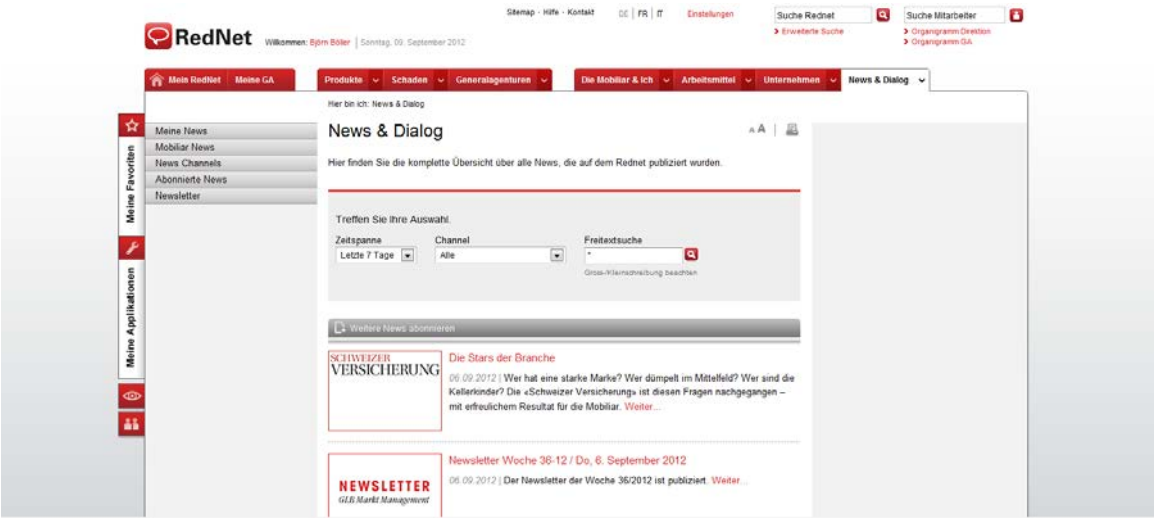


Pictured: Another view of the prototype shows an early version of the flyout for *My Favorites*.

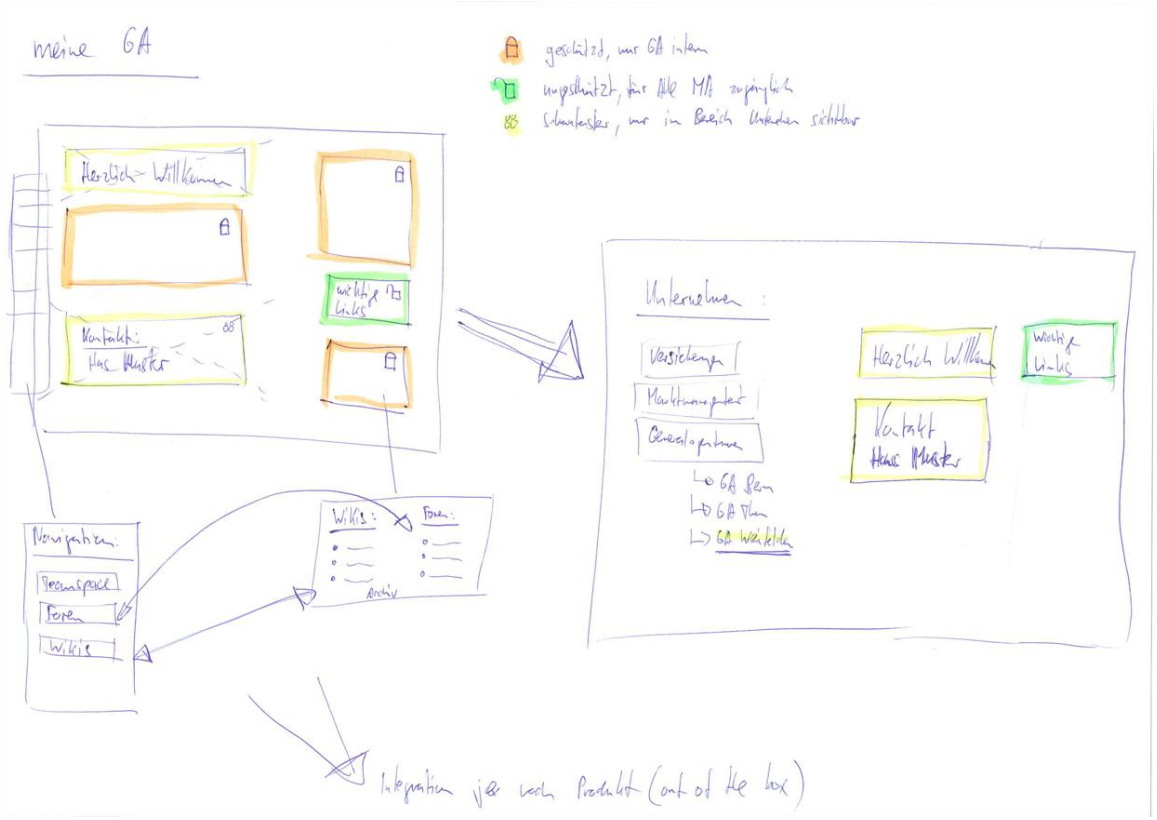
Some technical decisions (about search and communities) were made later in the project. The team was able to react quickly to changes, because it had the necessary usability skills in-house.



Pictured: The team sketched out many of its ideas, and sometimes discussed the sketches with users. This image shows an early sketch of the *News & Dialogue* section.

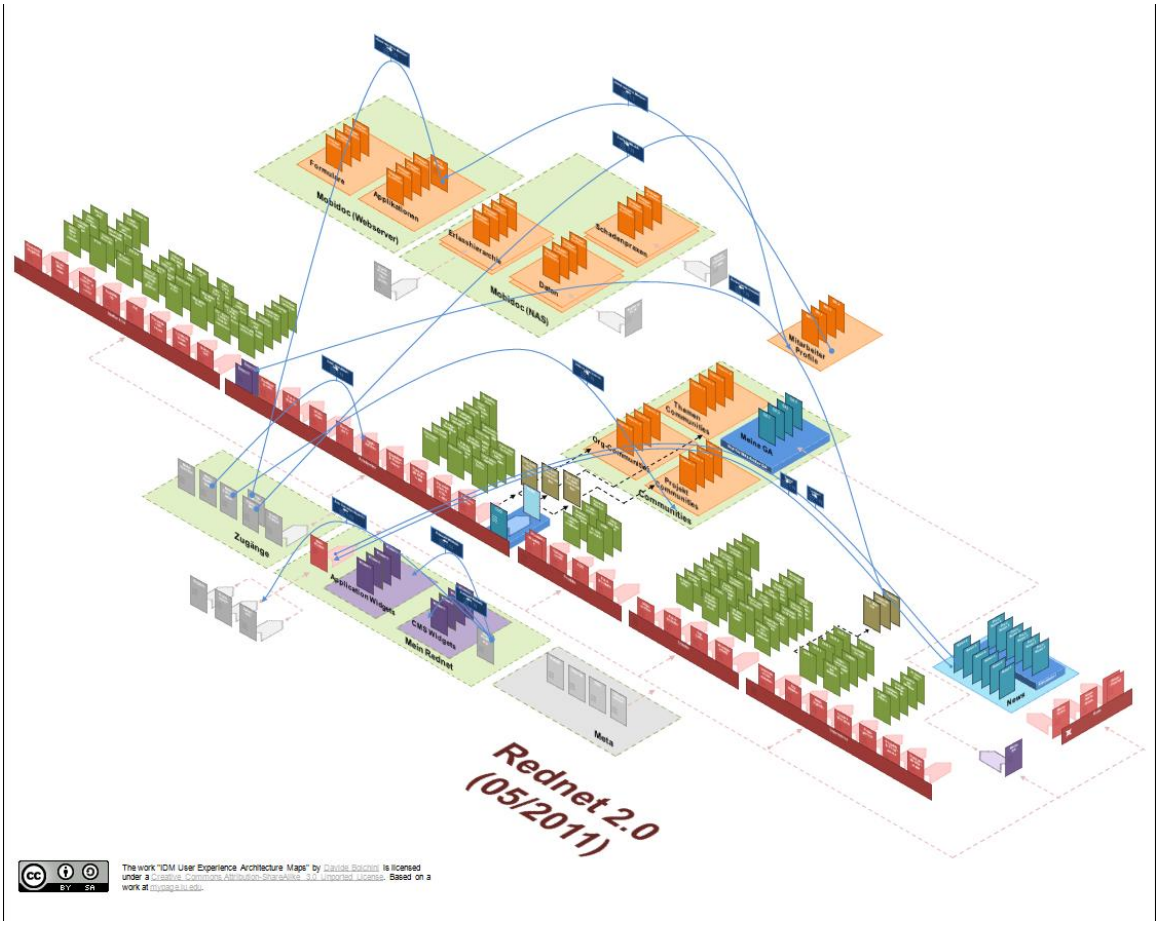


Pictured: *News & Dialogue* contains the complete news archive for the site and has its own full text search.



Pictured: An early sketch of the *Meine GA* (*My GA*) community.

In between these various design activities, the Mobiliar team met with other companies' intranet teams and attended national and international intranet conferences and meetings. This outreach truly informed the design decisions that were being made along the way. "The exchange of ideas, know-how, and opinion was very important for me," says Böller. "Sometimes, I came back from a conference with dozens of things I needed to verify in our re-launch project; just minor things, but they came to my mind when I talked to other intranet specialists."



Pictured: The company's content publishers could scarcely imagine how much content they had—in three different languages and various stages of authorization—let alone how much they would have in the future, so they used IDM architecture maps to visualize the intranet.[1] IDM lets users visualize the architecture of information-rich web applications such as large intranets. These maps can also be used to show content organization and hypertext connections.

Working with Agencies

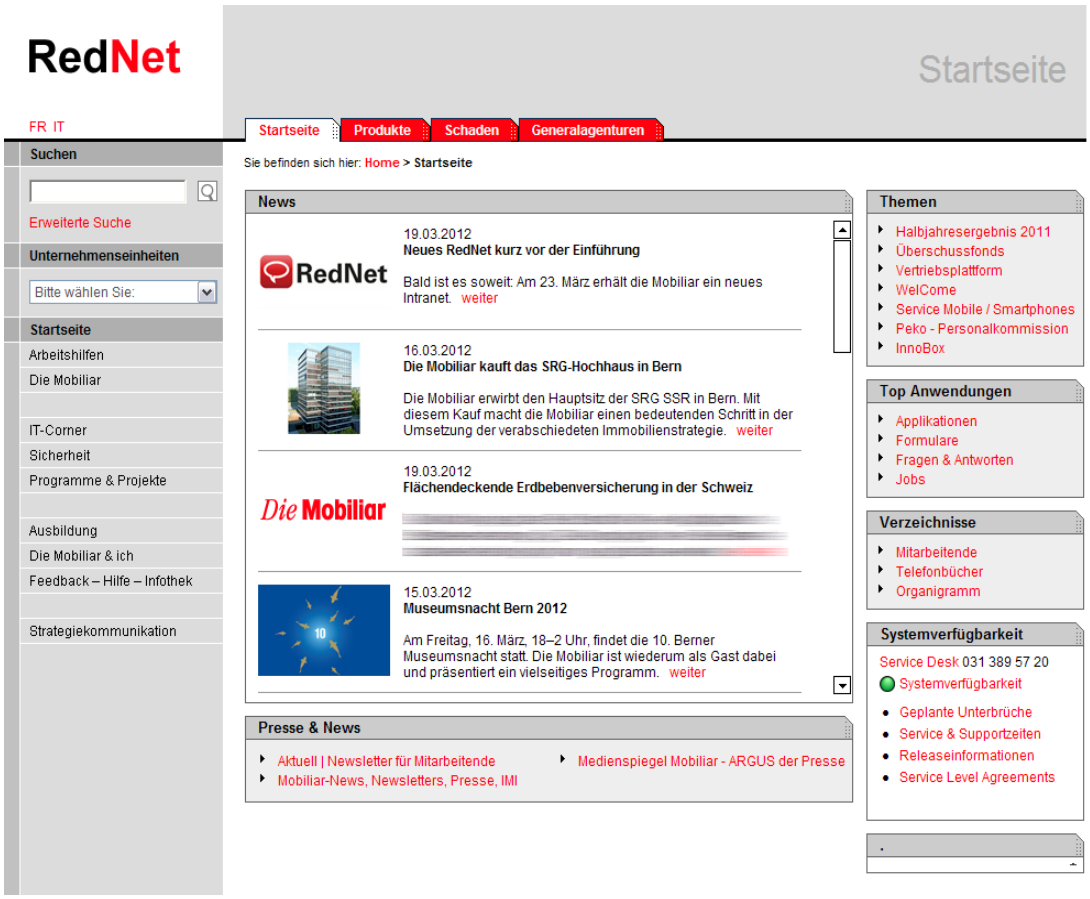
Working with outside firms was pivotal to the successful re-launch of RedNet. The Swiss Mobiliar team worked with four firms to extend the capabilities of its internal expertise:

[1] The work, "IDM User Experience Architecture Maps" by Davide Bolchini, is licensed under a Creative Commons Attribution—ShareAlike 3.0 Unported License. Based on a work at mypage.iu.edu. The maps can be created in PowerPoint using the template downloadable at: http://mypage.iu.edu/~dbolchin/UX_mapping.htm.

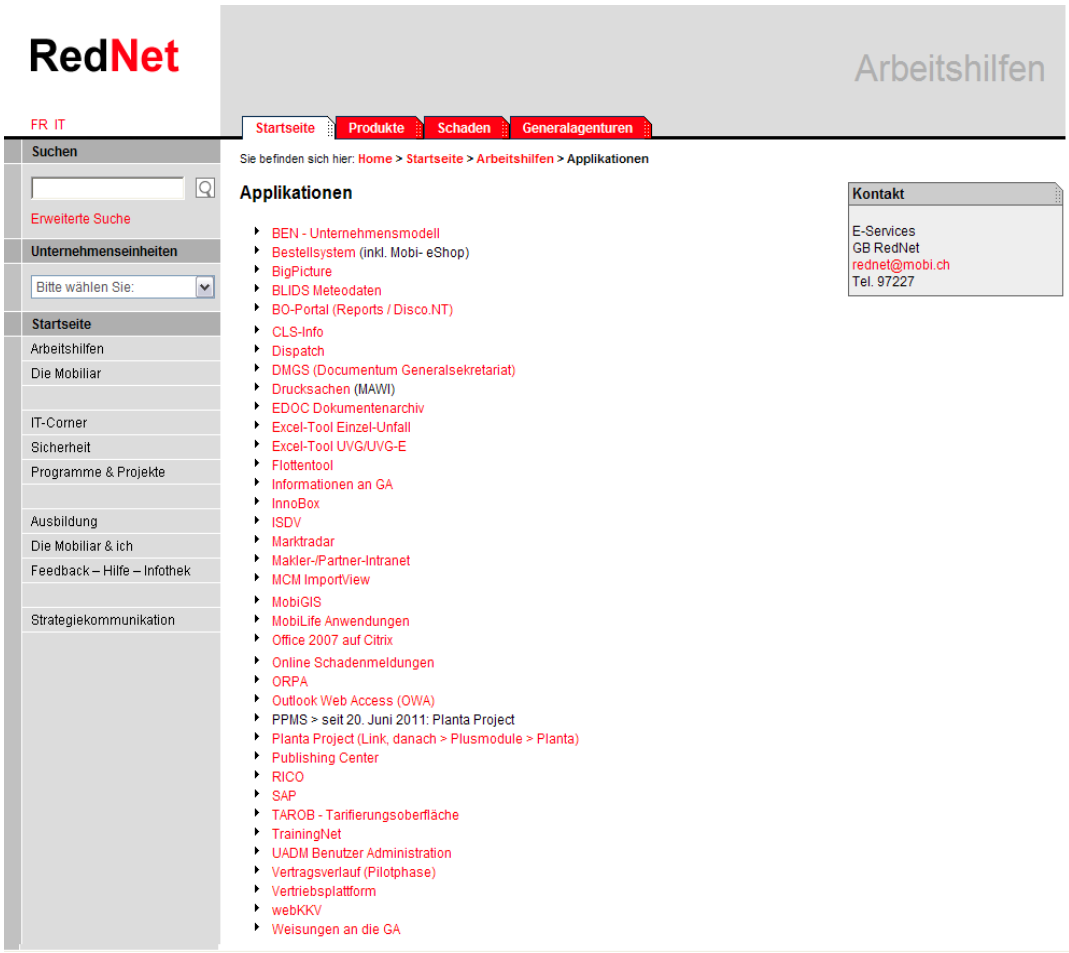
- **soultank AG (usability and user experience):** soultank conducted usability tests, expert reviews, and user surveys, and built prototypes. Uhr (soultank AG) and Böller (Swiss Mobiliar) did most of the fundamental concept work together. The agency has several years' experience with intranets and was involved right from the beginning. "For a project in this dimension, it was just not possible to do all usability/UX work internally," says Böller. "And the exchange of ideas and opinions with Marcel Uhr from soultank was also very important. They also brought in new ideas and valuable expertise. We worked together as a team. We complemented each other perfectly."
- **NOSE Design AG (interface/screen design, layout, style guide):** NOSE Design was brought in to bring some fresh new design ideas into the project. The first mockups were created internally, but later the team outsourced the design work completely. "The result of their work is what all our employees see and experience every day and contributes directly to the UX of the whole intranet" says Böller.
- **Infocentric Research AG (implementation and programming):** Infocentric is an Opentext Website Management specialist that implemented Opentext and programmed all of the features. Because Mobiliar had no expertise with Opentext, it outsourced all the work to Infocentric, whose team worked very closely with Mobiliar's internal IT team.
- **DTI Management AG (FAST Search specialist):** DTI implemented FAST on the Mobiliar's intranet environment and worked closely with its internal team. "DTI was responsible for the implementation of FAST in 2008, and it was very obvious that we should work together further," says Böller. "They are absolute search experts, and we can look back on a successful cooperation."

TIMELINE

REDNET INTRANET HISTORY	
Milestone Date	**Milestone Description**
2004	• In 2004, three different intranets were in use: Providentia (at Nyon), the first RedNet, and MobiLife
Late 2004	• Consolidated all three intranets; RedNet remained as the only company-wide intranet • Introduced new technical platform: Lenya (CMS) and Cocoon (portal)
2008	• Implemented FAST search
2010	• Introduced Webtrends for web analytics
REDNET RE-LAUNCH PROJECT	
January 2010	• Project kick-off
November 2010	• Concept phase concluded; three different prototypes (paper-pencil, low-fidelity, high-fidelity) were evaluated with end users
May 2011	• All technical concepts and specification concluded
June 2011	• Development phase begins
October 2011	• Content migration begins
November 2012	• Pre-launch satisfaction survey conducted with 700 participants
March 2012	• Launch: RedNet 2.0
August 2012	• First major release after launch, with about 20 improvements



Pictured: The homepage of the old RedNet (live until March 22, 2012).



Pictured: A typical unstructured link list in the old RedNet.

CONTENT AND CONTENT CONTRIBUTORS

Choosing a CMS

The project team chose Opentext Website Management as the CMS for the new RedNet after a comprehensive evaluation phase; many stakeholders were involved. "We looked at pure portal technologies, pure CMS, and a mix of both. Business had some favorites, and IT had some favorites; some were not compatible with the IT strategy, some did not fit with the business needs," says Böller.

The team had high standards for personalization, individualization, and publishing capabilities and one mission-critical criterion: everything had to be possible directly from the CMS. "For instance, that we can publish a widget or new news channels out of the CMS by ourselves (in our team) and without touching a second system," he says.

Content Publishing

The RedNet team consists of four people total. Of the four, two publishers (contributors) are 100 percent dedicated, one is 80 percent, and one is 40 percent. Beyond the core team, about seven publishers add content to the site. Because the intranet publishes in three languages, there are publishers who are bilingual in

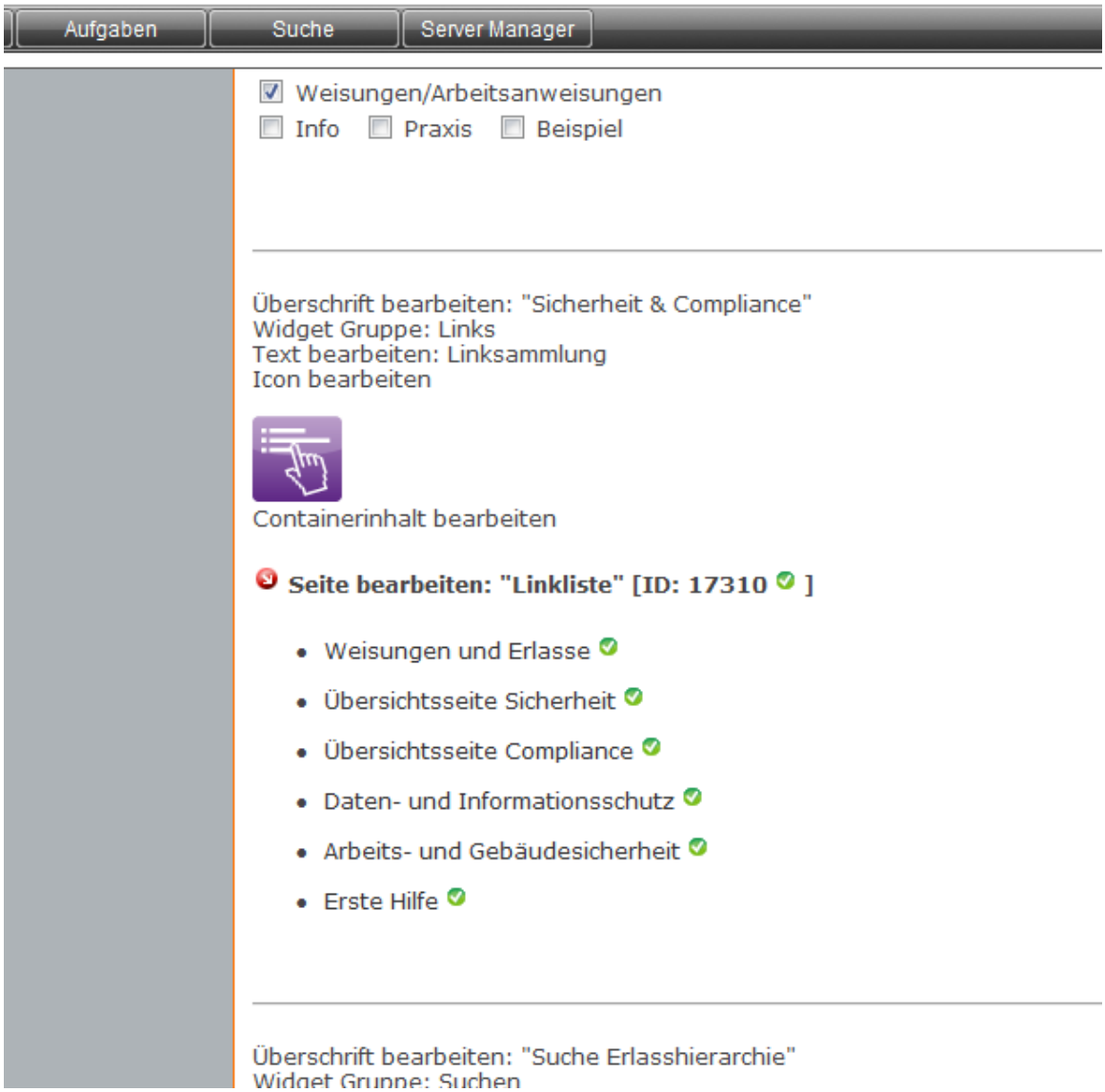
German and French; for Italian, the team is supported by the company's internal translation service. The site's main language is German, but approximately 60–70 percent of the content is in French, and 20–30 percent is in Italian. In addition, all labels, buttons, and navigation items are available in all three languages.

Each business unit has one or more content managers. These people serve as the main point of contact for the whole business unit and coordinate all of its content. Some content managers are also content publishers and can publish content immediately, but most RedNet content (80 percent) is published through the core RedNet team.

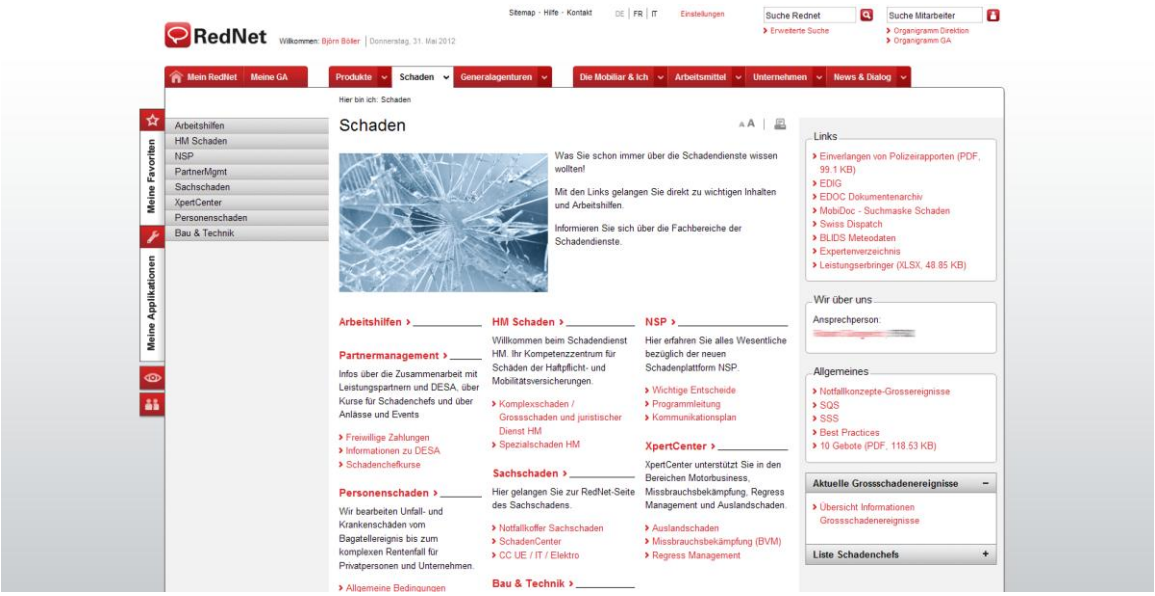
There is no editorial workflow. Corporate communications reviews all companywide news (*Mobiliar News*), and the Content Master reviews all other news.

Guidelines and Standards

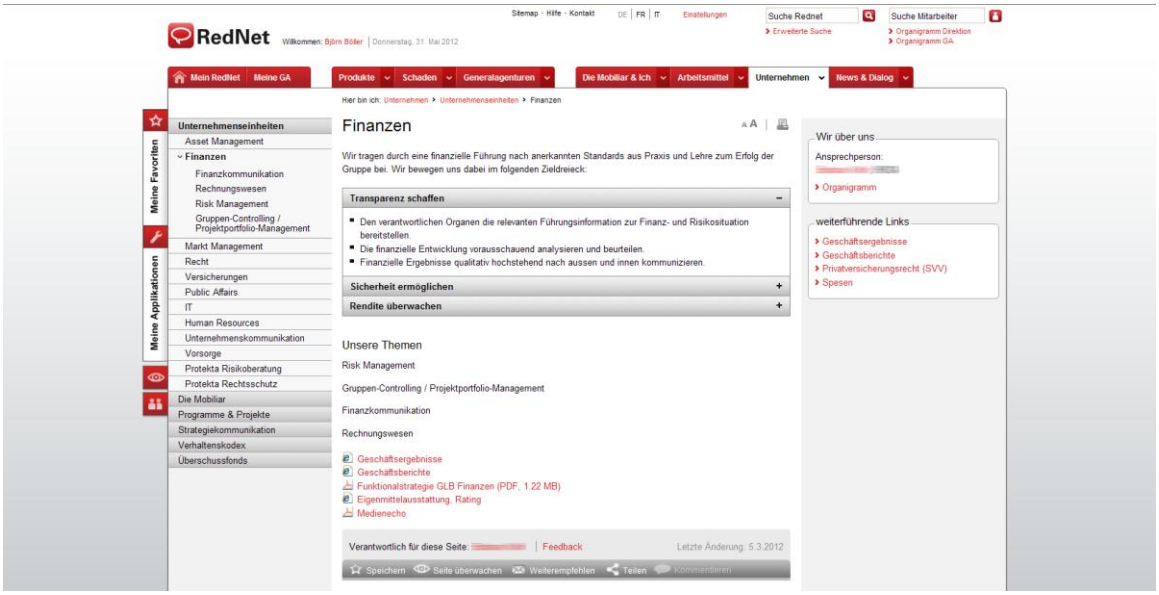
The team has established publishing guidelines covering, for example, what must not be published, and has overall intranet governance in place. "We check content regularly and give our content publishers direct feedback," says Böller. "Also, a feedback button on every page makes it possible for our users to give feedback. This feedback button is very valuable since we get a lot of feedback about outdated or incorrect content."



Pictured: All widgets can be maintained in the CMS, so no IT resources are necessary to add a new widget.



Pictured: A standard first-level content page.



Pictured: A standard second-level content page.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**

Web Server Hardware and O/S	• O/S:
	  ○ Red Hat Enterprise Linux Server 5.4
	  ○ JBoss 5.1.4
	  ○ JDK 64 Bit
	• Hardware:
	  ○ Linux on ESX
	  ○ JBoss 64 Bit

Bug Tracking/Quality Assurance	• HP Quality Center • BMC Remedy
Design Tools	• Balsamiq Mockups • Axure • Adobe Photoshop and Illustrator

Content Management Tools	• Opentext Website Management
	  ○ Delivery Server 10.1 Build 10.1.1.1
	  ○ Management Server 10.1 Build 10.1.2.358

Search	• FAST Enterprise Search 5.3
Other Functions	• Opentext Social Communities (formerly Vignette Collaboration) for communities, commenting, and rating • Ingentis org.manager to generate organizational charts • Webtrends for web analysis

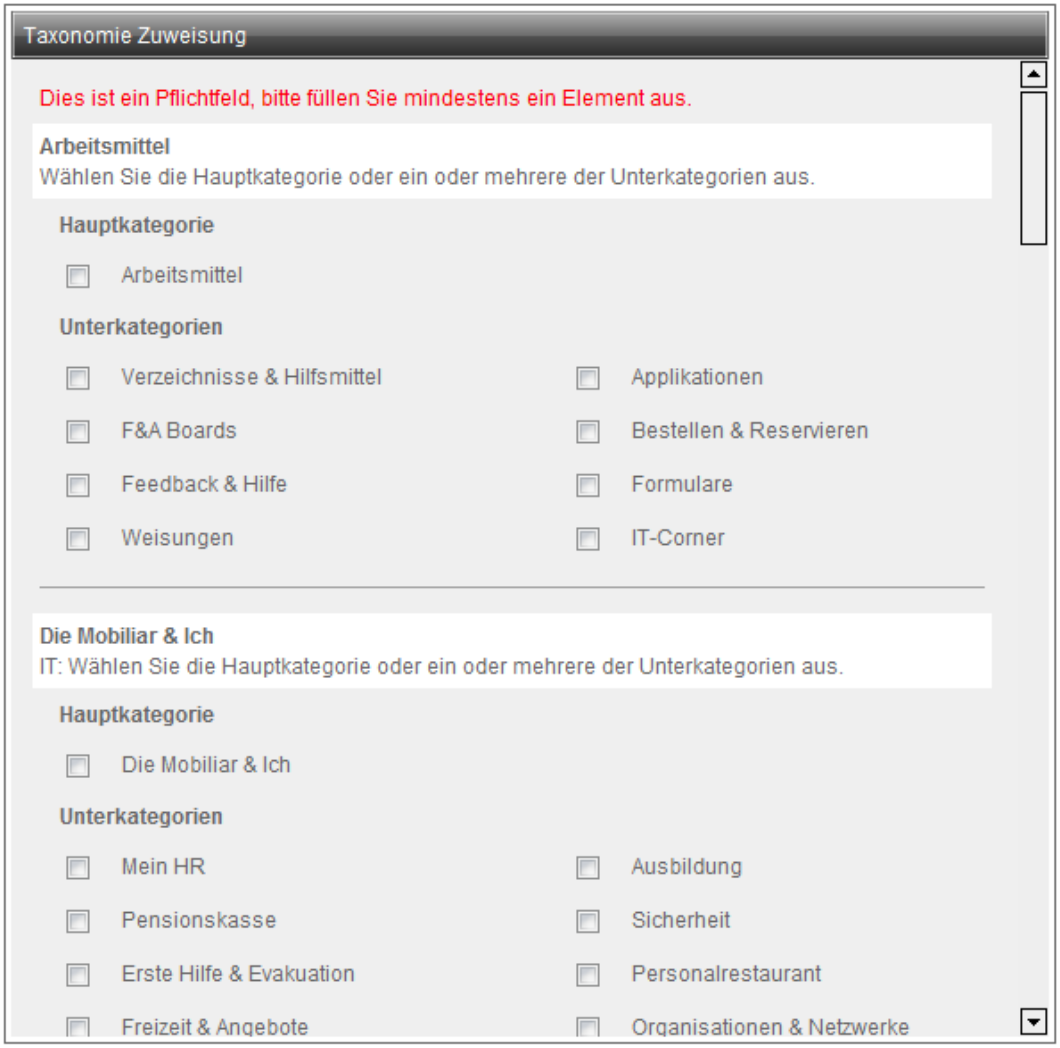
SEARCH

Search is often one of the most important features of an intranet. "We knew from the beginning that search will be one of the most crucial parts in our project," says Böller. "Our users have been dissatisfied with search for many years, and we were totally aware of the fact that we desperately needed to change this state. Together with the search experts from DTI Management, we decided to implement a faceted search."

The new search shows all categories—such as *Produkte* (*Products*)—on the left side. Subcategories appear by clicking on the category. "We introduced a central

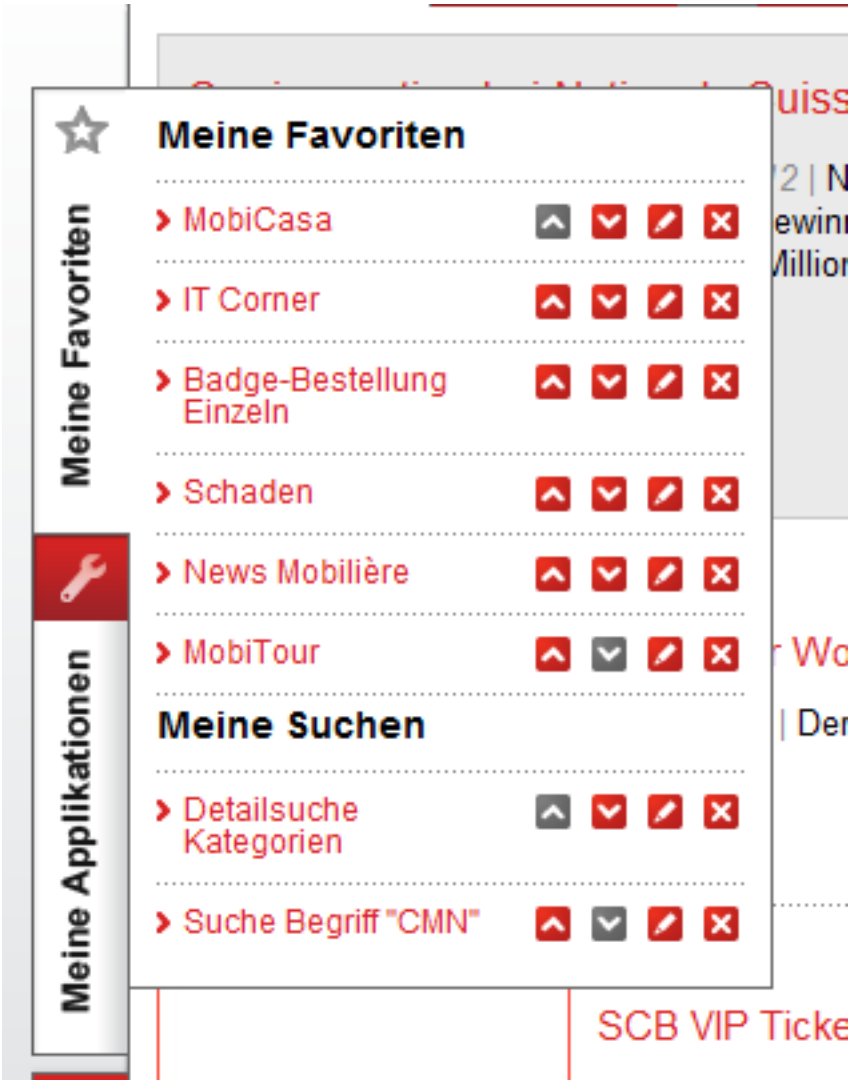
taxonomy based on the navigation structure," he says. "We used the same wording for categories as we used for the main navigation areas. In order to publish a content page, a PDF or a news story, it is necessary to indicate the taxonomy for every single piece of content in the CMS."

Taxonomy is a mandatory attribute in the CMS. A content page must indicate the taxonomy category to be published; otherwise this approach would not work. The meta-information is stored together with the content, and FAST displays it in the correct category. In addition to taxonomy, keywords (free text) can be added to every content page or asset.

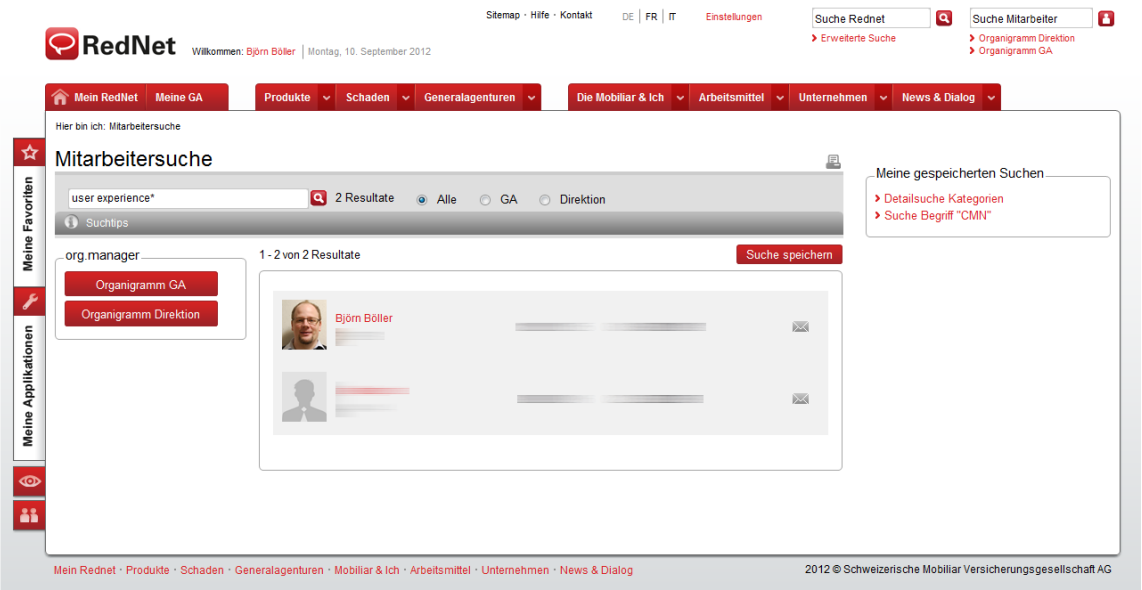


Pictured: A glimpse into the site's backend CMS. This screen shows how the taxonomy is edited and managed.

All search results appear in the middle section of the page. On the top of the right rail, employee results appear as *Aus dem Mitarbeiterverzeichnis* (*Results from employee directory*). Beneath all related searches (*Verwandte Suchen*) are the saved searches (*Gespeicherte Suchen*). Each search request can be saved and appears under *Meine Favoriten* (*My Favorites*).



Pictured: Any content page can be added to the user's personal favorites. Once added, they appear in the *Meine Favoriten* (*My Favorites*) flyout menu.



Pictured: The employee search can find experts directly, whereas the "standard" RedNet search shows content and experts and connects them (in this example, the search term was "user experience").

All profile data is also indexed by the regular RedNet search. This is the first big step toward a "Find an expert" feature that is planned for a future release. "We want to connect content with people," says Böller. "Therefore, it is necessary that our employees maintain their user profiles and add skills and interests. Everywhere where a name of an employee appears, the profile can be opened with a single click on the name."

RESULTS AND ROI

Personalization has been the big win for the RedNet re-launch. "What we know from first interviews and visits to our agencies is that the new personalization features are widely accepted and in use," says Böller. Following are examples of the personalization function's success:

- "Our staff stopped adding favorites in Internet Explorer because they have all they need in a single place. It is all there, were they need it." (Böller)
- "Employees do not have to click through the whole intranet anymore in order to find important news, links to applications, etc. It is all there. It is less time consuming and more usable. The use is self evident and no longer tedious." (Böller)

- "Our organization profits from well-informed employees. We now really know that they get crucial information; we do not make assumptions anymore. Since some information must not be published to certain organization units (for example, because of labor law restrictions), we as E-Services or Internal Communications can govern all publications. The organization also profits from a self-reliant staff. They can best decide what they need in order to achieve their daily duties. At the same time, they get acquainted with the system, which is profitable for the employees as well as the organization." (Martin Doriot, Head of E-Services)
- "We estimate that about 60 percent of our personnel somehow individualized RedNet within the first 90 days after launch." (Böller)

Following are more detailed figures:

PERSONALIZATION STATISTICS			
	Total Widgets Added	**Total Applications Added to *My Applications***	**Total Favorites Added to *My Favorites***
30 days after launch	1,900	7,800	2,400
90 days after launch	2,200	9,900	3,200

Page views have also increased substantially since launch. The site received 4.16 million page views in the first half of 2012, representing an increase of 300,000 page views (+ 8.1 percent) against those recorded in the second half of 2011. "We assume that this big growth stands in direct correlation with the going live of the new RedNet," says Böller. "We are happy about these figures, but we also know that content quality cannot be measured by the increase of page views."

LESSONS LEARNED

Swiss Mobiliar team members share some of the lessons learned from the RedNet re-launch project:

- **The dangers of using *lorem ipsum*:** "HTML, CSS, jQuery, etc., was initially developed by an external agency that was not deeply involved in the project. At a first glance, all coding was properly done, but soon we realized that some essential things had been neglected. It was developed exactly how it was designed in Photoshop, but not for reality. For instance, line breaks were not regarded properly. Our implementation partner, Infocentric Research AG, together with our internal IT, had to fix this while developing. Finally we got proper code, but it cost some money and time. I recommend only hiring absolute professionals in the area of front-end engineering. Especially if you use an older browser version and do not want to live without newer features such as rounded corners or drop shadows." (Böller)
- **Use the re-launch as an opportunity to purge old content:** "Over the years, several thousand documents came together and influenced the search results in our old intranet. Some documents were more than five years old, and we knew that nobody ever used them. We therefore decided to delete

those documents—actually, we copied them to another file share—months before went live with our new RedNet, just to be sure nobody really needed them and not to be blamed after going live. We did that step-by-step and had no argument with any content manager during migration because we had the evidence that nobody used this content anymore. So, we didn't need to migrate any of those documents—and no one ever asked for them." (Buchenhorner)

- **Keep to short decision cycles:** "If the goal of a project is to yield a highly innovative intranet, it is likely that the solution is very individual and tailored to the company's needs. In such projects, short decision cycles are crucial, otherwise is will not be possible to make all decisions within a reasonable amount of time. It is necessary to have all critical expert knowledge on the business side in-house. Without it, it is hardly possible to manage such projects or get the planned results." (Doriot)
- **User-centered design is important:** "Usability and user experience were very important for us from the beginning. Therefore, it was clear that we needed to proceed with the user-centered design approach (ISO 9241-210). The result also gave us the certainty that it was the right decision. Our users were always in the center of our thinking and acting." (Böller)
- **Have vision and courage, and persevere:** "I think for an intranet manager, it is very important to have a clear vision and a strategy. This vision should guide you through the whole project. As I mentioned, user-centered design, usability, etc., is very important, and I would be the last person to say this can be neglected, but it is also very important to have clear vision and, sometimes, courage to make decisions. Letting the users decide solely does not work.

  "Therefore, it is necessary to have broad domain knowledge and the experience (and confidence) to decide what can and what cannot be realized, informed by constant user feedback. At times, intranet projects can be daunting, especially if they take two years from the first brush stroke to the launch. That is why it is so important to have endurance. And, again, with a vision in mind, it will work." (Böller)

XL Group plc

Using the intranet: XL Group plc, through its subsidiaries, is a global insurance and reinsurance company providing property, casualty, and specialty products to industrial, commercial, and professional firms; insurance companies; and other enterprises throughout the world.

Headquarters: Dublin, Ireland

Number of employees the intranet supports: 4,000

Company locations: 60 offices in 21 countries, serving clients in more than 100 countries worldwide

Annual Sales: Net premiums earned $5.7 billion (FY 2011) and total assets of $44.6 billion (FY 2011).

Design team:

In-house: Core team of seven people responsible for project delivery; Business Advisory Group of nine people representing broker/client/prospect facing functions and major intranet audiences; and a strategic steering committee of six people.

HUGE: Core team of four people responsible for project strategy and management; and a design team of seven people representing product design, user experience, and visual design, and including a content strategy specialist.

Members:

XL Core Team: John Flannery, Project Lead; Rich Williams, IT Lead; Satvinder Khurana, Online C&M lead; Marcy DeMassa, Project Manager; Shahar Tamari, IT Architect; Chru Singh, Search Lead; and Sangeeta Patel, Content Lead

HUGE: (Core team) Lilie Chang, Engagement Director; Brock Boddie, Associate Program Director; Chris Michaud, Senior Product Strategist; and Josh Dern, Product Strategy Lead; (Design team) Felipe Memoria, Partner; Leala Abbott, Content Strategist; Leandro Brasil, Product Designer; Sergio Salvador, Experience Lead; Jose Coccorese, Product Designer; Joao Paulo Teixeira da Silva, Art Director; Fabricio Marchezini, Senior Product Designer; and João Mermolia, Product Designer

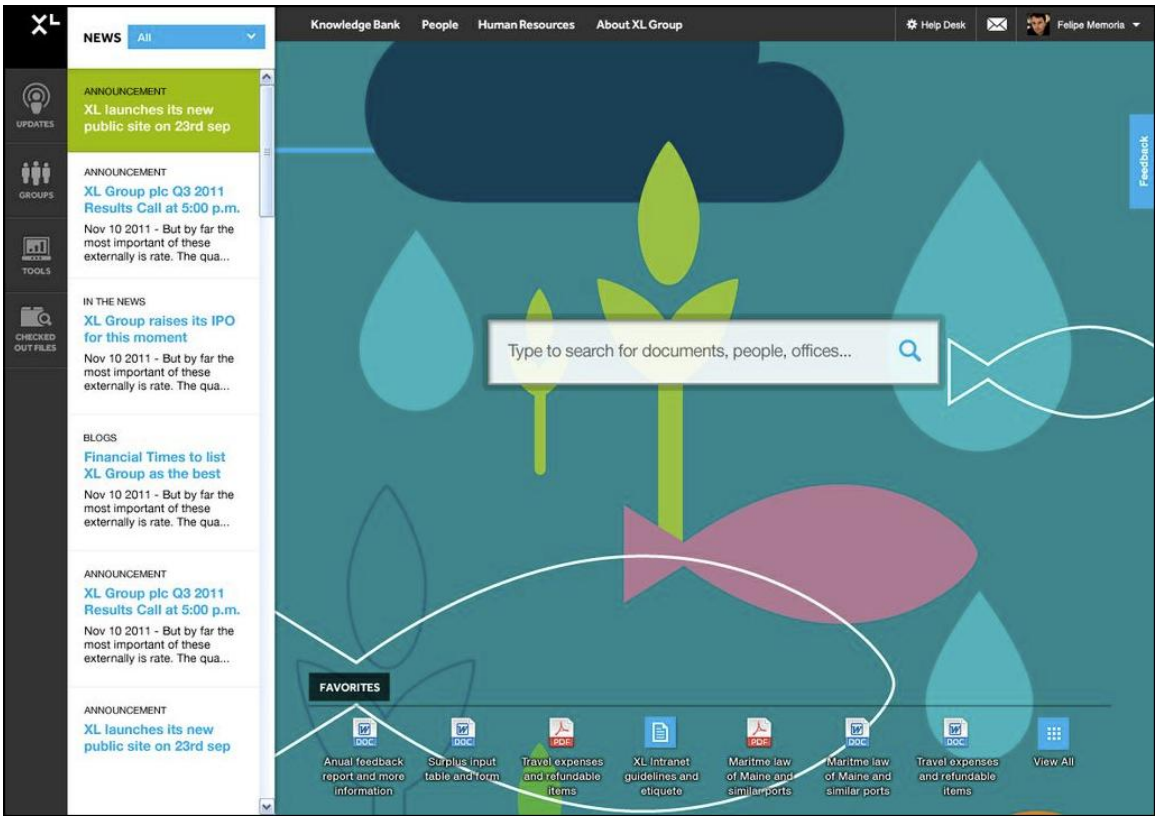
Tallan: Adam Worobec, Reddy Kadasani, Tim Heinlein, Jian He, Max Weber, and CEO Craig Branning

SUMMARY

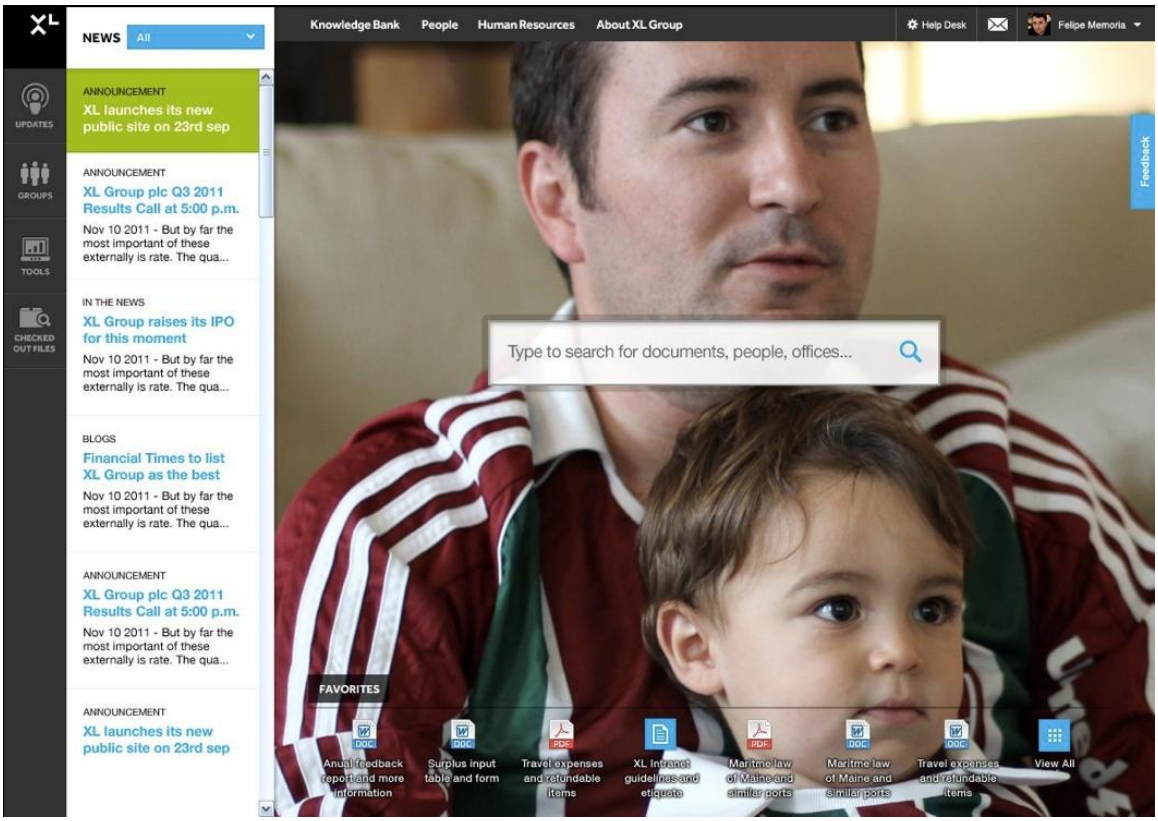
It takes guts, sweat, and barrels of creativity to create XL World, the intranet at XL Group plc. The site's aesthetics and features are perfect for today and tomorrow's users.

On the homepage, you immediately sense that this is something special: There are no boxy-looking sections or crowds of links. Instead, users can choose a picture they like to consume most of the screen real estate in the background. Although rather unconventional now, this style might become more common as Windows 8's Metro Style infiltrates offices. Even now, however, the XL intranet is still intuitive while perpetuating uniqueness.

A powerful search takes center stage on the homepage, with a large open field where users can search for anything their hearts desire. A new Knowledge Bank utilizes a metadata-driven organization of XL Group's vast amount of content and files.



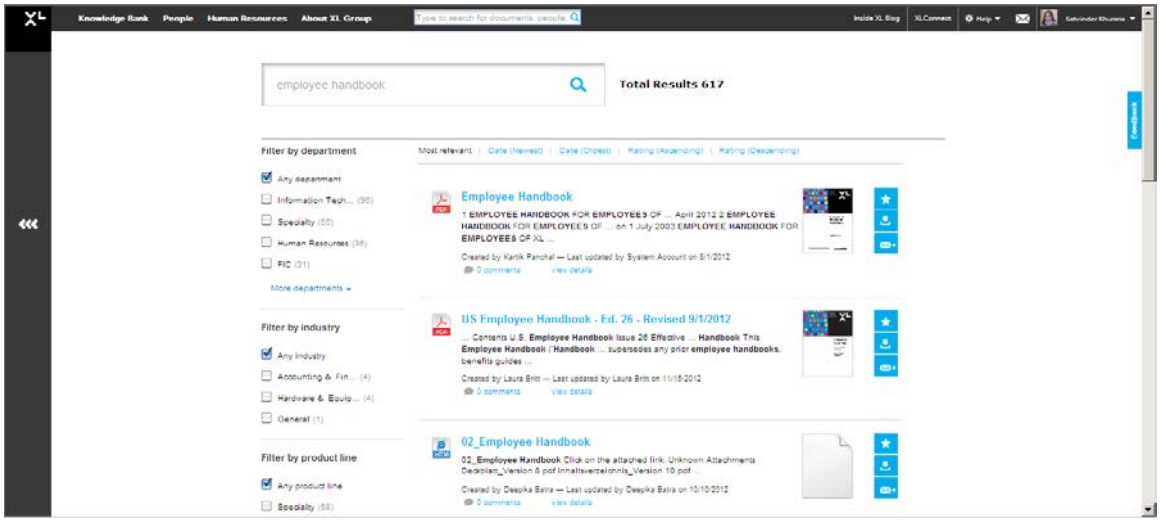
Pictured: Users can replace the default background image on the XL Group intranet homepage.



Pictured: A user customized the XL Group intranet homepage by replacing the default background image with one of his own.

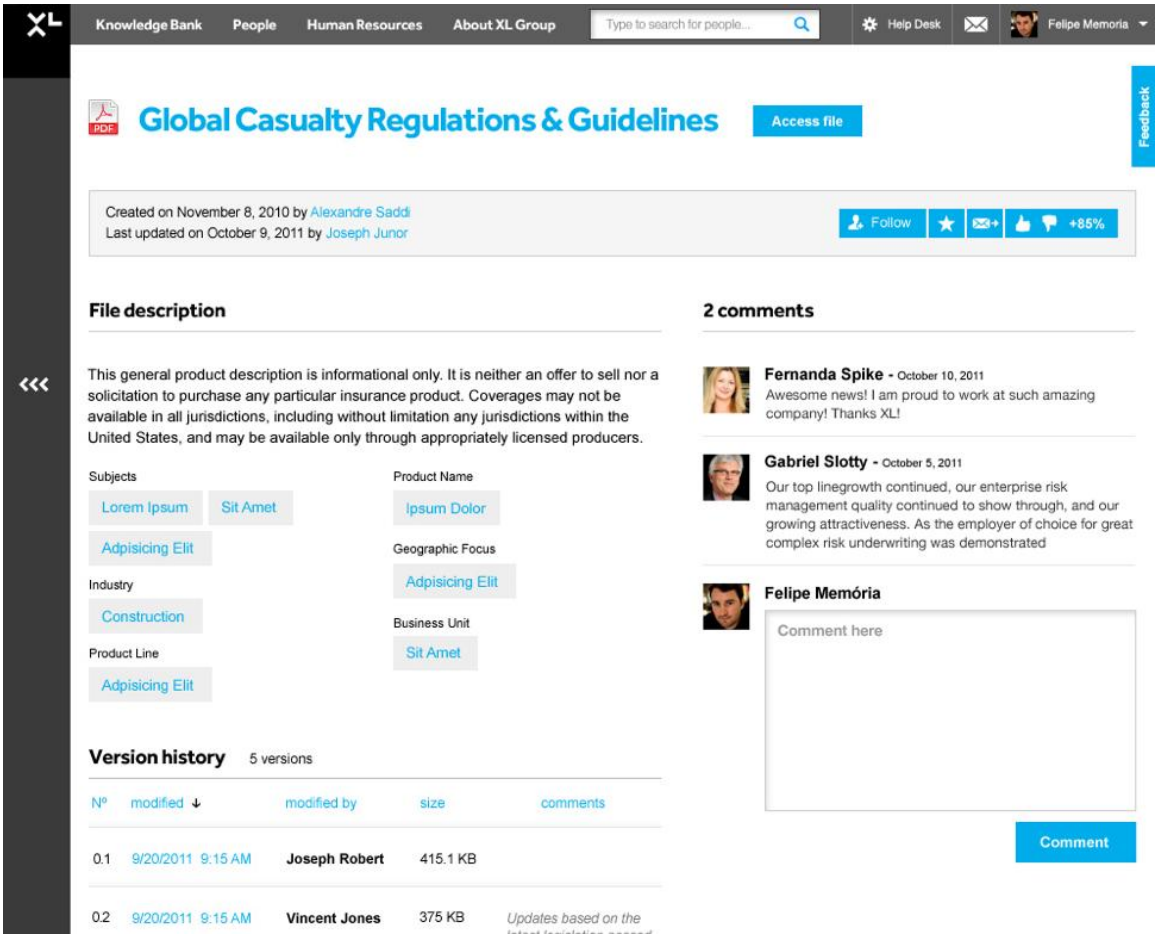
The search results are divided by people results and other content, including documents. Users can sort by most recent and ratings ascending or descending, or keep the default view, which is sorted by most relevant. In addition to sorting results, the filters on the left side (thanks to Microsoft's FAST search) allow users to filter by tags, date, type, and other criteria.

Users can view comments about the documents, see more details, and see a thumbnail preview of the document. All of these features help users make good choices at the results page level, rather than having to waste time and effort clicking through fruitless links.



Pictured: Users can sort and filter search results and see previews of documents.

The *details* link in the search results opens the document details page, which describes the file and shows tags, versions, and comments. Users can also make comments, add to their favorites, email, or rate the document with thumbs up or thumbs down.



Pictured: The document *details* page describes the file and shows tags, versions, and comments. It also lets users make comments.

Clicking a link for a person leads to his or her profile page, which gives employees a good sense of one another. In this case, the user's title and team displays at the top, along with a close-up photo. The ability to *Follow* or favorite the person comes next, followed by contact information and more specific details.

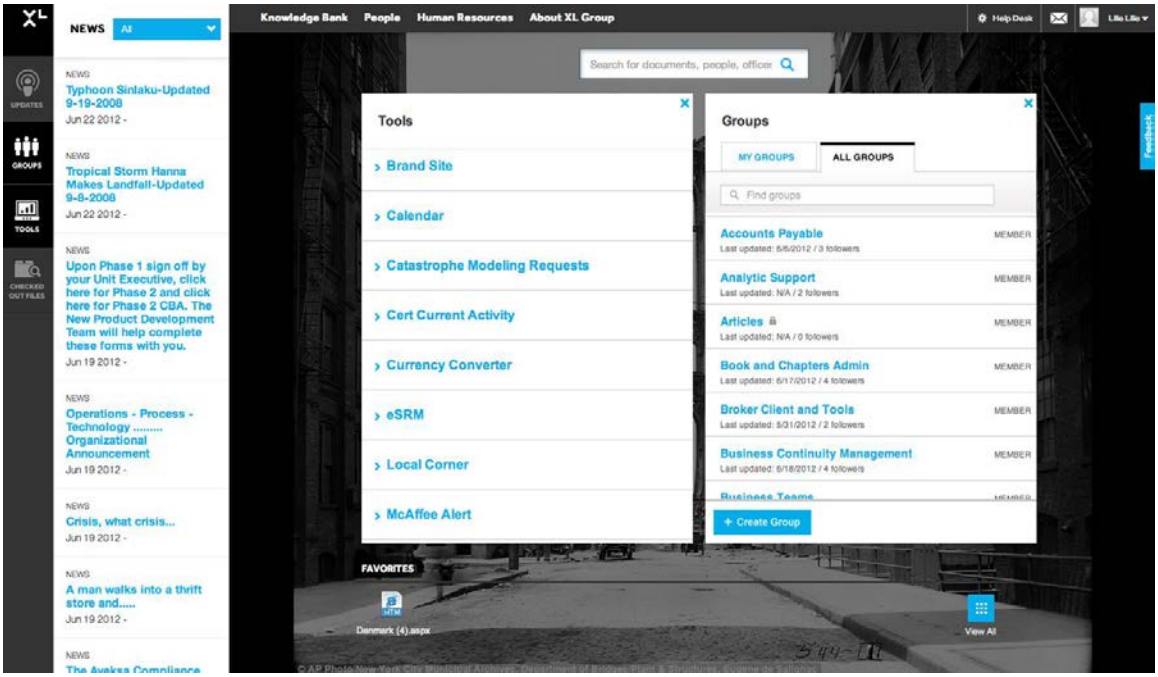


Pictured: A user's profile page offers a photo, information about the person's background and activities, plus multiple ways to connect.

When browsing makes more sense than searching, the homepage offers easy options. The global navigation appears in an expected place: at the top of the page. The icons, or "widgets," on the far left offer users quick access to updates, groups, important tools (such as travel request forms and the corporate calendar), and document management areas. Users can also add links to documents they're working with at the bottom of the homepage for easy access.

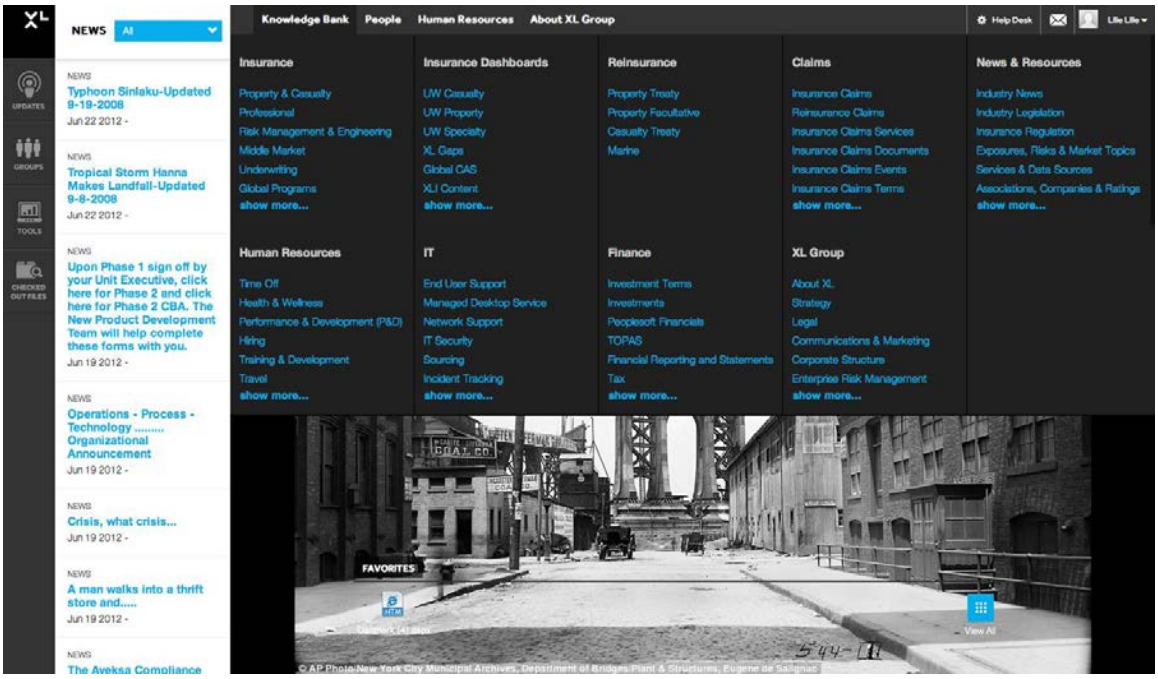
Top news announcements appear in a rail down the left side, and include an obvious title for each dated news item. The blue, bold text obviously represents a link, and it's legible on the white background. Dates are in an international format, with the month spelled out. Users can scan just the top news or scroll this list for more.

Clicking the widgets on the far left opens panels of menus, with large, legible type. Designing these modules outside the traditional flyout or expand-in-place UIs lets the designers use more space for the commands list, where they can make the text larger and add more white space between links. This creates a calmer, less crowded design and makes the targets easier to see and click.

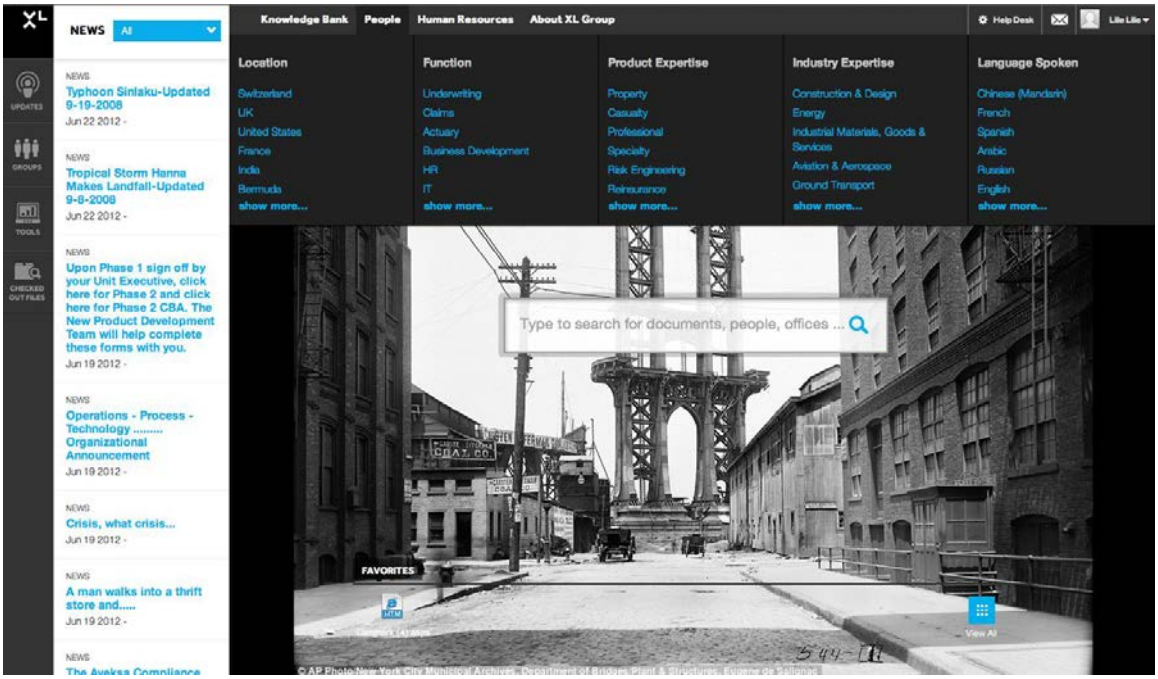


Pictured: Putting icons or widgets on the left, or open panels of menus, in the center of the page, affords more space for larger text and white space, which are scarcities in the traditional flyout and expand-in-place menu UIs.

The global navigation links at the top open mega menus for easy access to all links. Users can scan many links at once in this UI. The designers carefully categorized the sets of links so like items are packaged together under an understandable heading. In this set-up, users can quickly scan, guided by the white, bold headings for each section. If the heading seems promising, they can spend more time scanning the blue links under those headings. To keep the menu manageable, designers show six or fewer menus links under each heading. If there are seven or more, a *show more…* link appears last, and users can click this to see the rest of the items. Some menus contain as many as 10 sections.

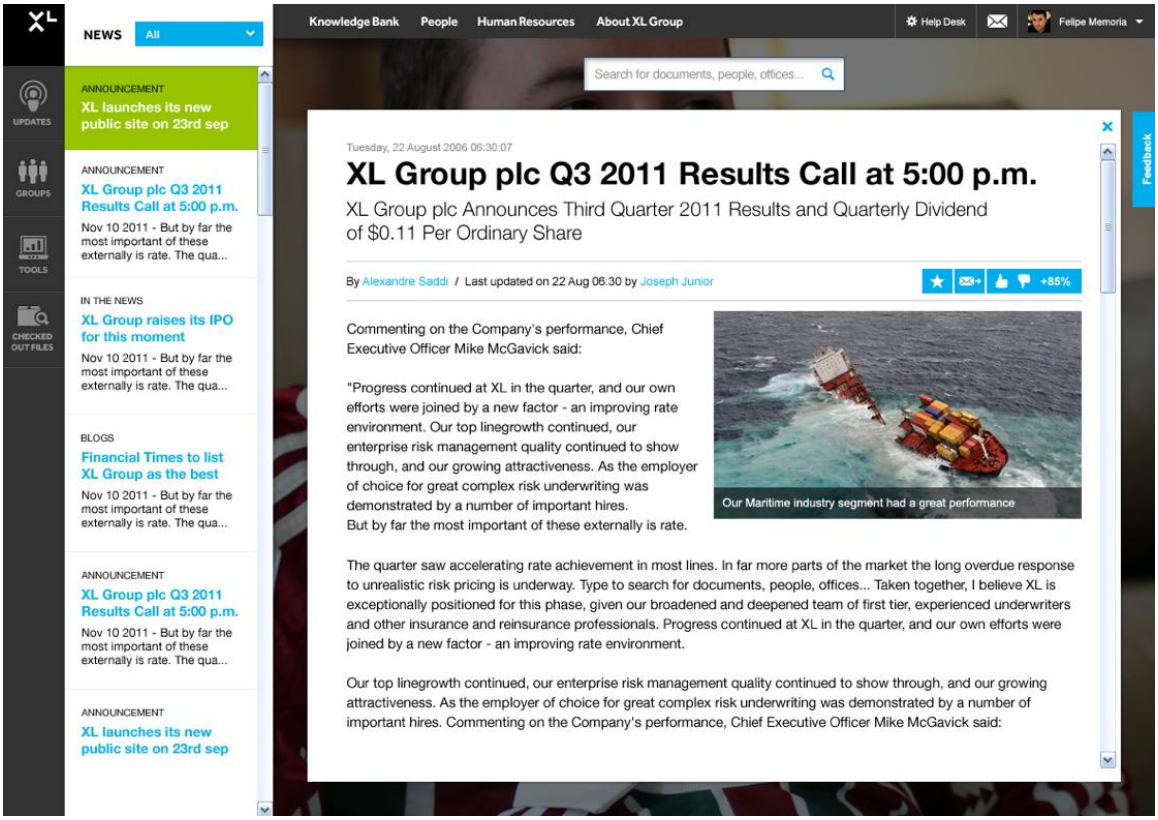


Pictured: The mega menu is divided by category, with discernible headings that users can scan. The menus fit up to 10 sections with six links per section, plus a *show more…* link for additional listings.



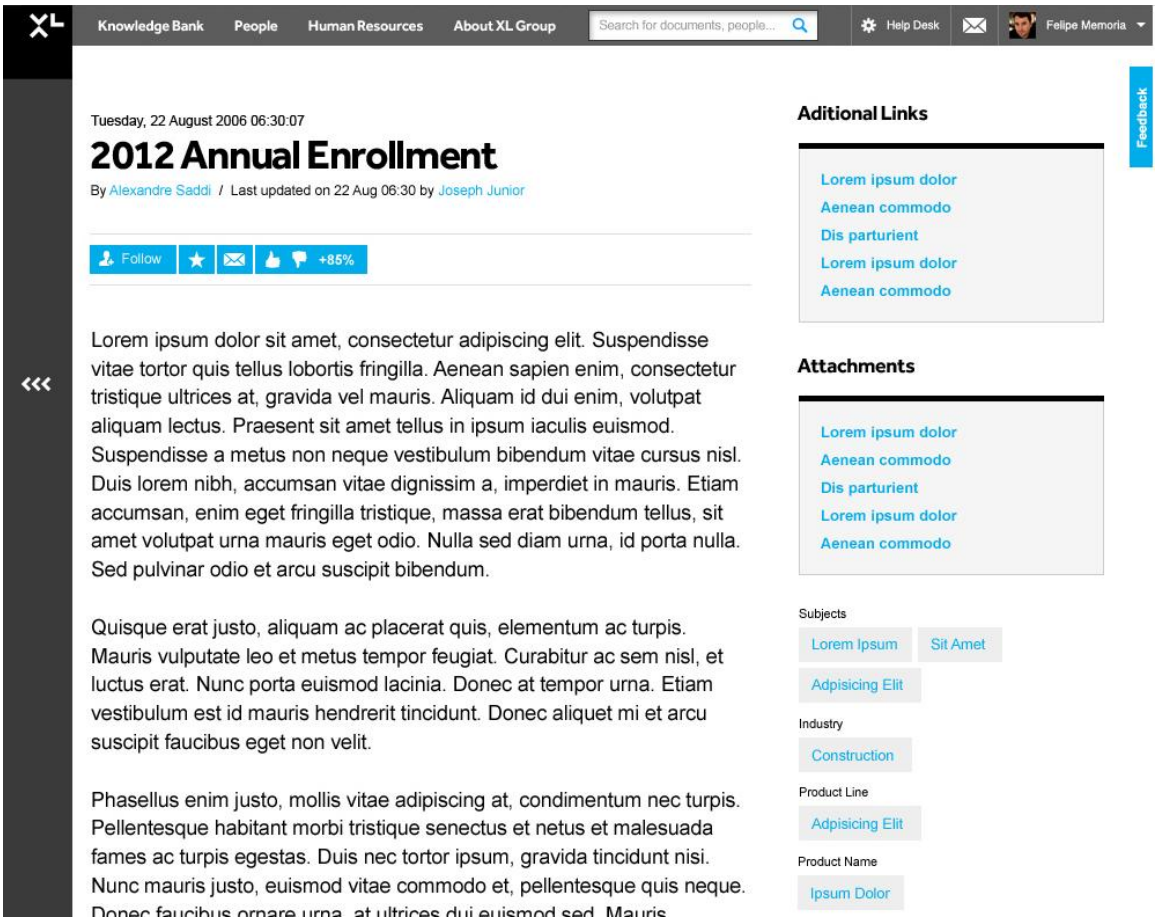
Pictured: Some mega menus display fewer sections.

For clarity and consistency, designers created only two different content page layouts, one for news and one for other content. The news page shows a large title, date, and byline; clear text; and space for a good-sized image at the top. Icons let users add the article to favorites, email it, and give it a thumbs up or down rating.



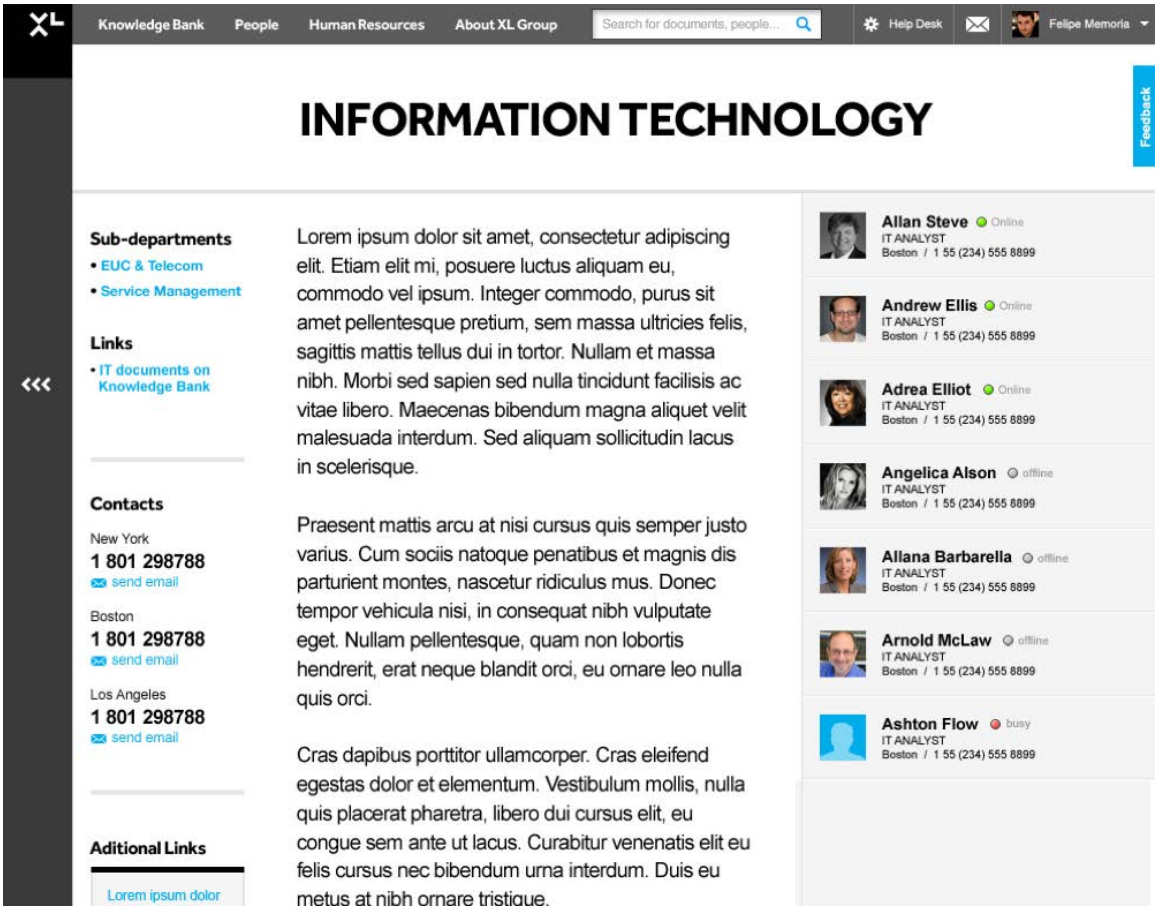
Pictured: The page layout for news articles makes them easy to read, and allows space for an appropriately sized related image.

The content pages also let users add the page to favorites, email it, and rate it thumbs up or thumbs down. The right rail helps users find related information through additional links, attachments, and tags.



Pictured: On content pages, features in the right rail help users find related information through additional links, attachments, and tags.

Department pages offer information about that department in the main content area. The right rail has information about key people, including photographs; the left rail offers contact information and links to sub-departments—everything a coworker would need to know.



Pictured: Department pages offer information about that department in the main content area, information about key people in the right rail, and more useful content in the left rail.

This XL Group intranet is beautiful, but not at all shallow. It's about making people more productive and looking fabulous while doing so.

BACKGROUND

Since 2010, XL has been working to define and implement new business strategies, including establishing a new brand and a new way of thinking about corporate culture. "Leadership took an inclusive approach to re-establish the company vision and strategic direction, and in doing so widely recognized the value of collaboration and innovation," says John Flannery, VP Online Communications & Marketing. That push toward new business strategies naturally led to a greater emphasis on the company's intranet as a means of conveying and supporting the new initiatives.

"Operating across worldwide time zones and cultures, XL sought to actively engage colleagues in striving towards new goals," he says. "As a shared, concrete experience of XL—accessed multiple times a day—the intranet could either undermine or support realizing the 'new XL.'"

Several factors were behind the push toward a boldly re-imagined intranet. Flannery explains:

- **Support employees:** "Part of XL's new strategy is to establish the best talent and technology in the industry, with the new intranet strongly signaling the intent to do so. Technology is what helps XL employees do their jobs and can demonstrate why XL is different."
- **Foster collaboration:** "In aggressively pursuing collaboration and innovation, XL sought systemic support for these processes and behaviors."
- **Replace aging technology:** "The former intranet ran on a technology platform that was being sunset by the vendor and was increasingly unsupportable."
- **Establish a governance structure and workflow:** "After 10 years from inception, the former intranet caused frequent frustration and lost productivity due to poor governance and content management."

Giving Structure to the Vision

The project's main goal was to establish a shared workspace for XL employees that was both fast and efficient, thereby increasing collaboration and adding value back into the workday—or, as Flannery puts it, to "create a portal that's as efficient as the web sites employees use every day."

The portal also needed to:

- Allow employees to more effectively leverage expertise across the company
- Support the shift to a more virtual office
- Reflect the XL culture

It's important to have an overarching set of goals, but it's also important to work through the tactical details that will help that vision come to life. The team outlined the following ideas to support its vision for the new intranet:

Guiding principles:

- Make finding things fast
- Provide a personal experience
- Place a high value on quality content

Features:

- A clear, simplified IA structure, using a controlled vocabulary augmented by tagging
- Faceted search
- Customization
- Employee profiles

Governance:

- Establish clear rules of ownership and governance to ensure up-to-date, high-quality content

With these parameters in mind, the team set out to figure out just how to turn these goals into a successful outcome. In addition to information gained from annual surveys, team members employed multiple research techniques to try to better understand nuances of both their company and colleague's needs. During the research and analysis phase, they used the following methods to uncover those needs:

- **Usage data** of most frequently used areas, documents, etc.
- **Discovery sessions** with Steering, Advisory, and Core teams
- **Phone interviews** (more than 100) with colleagues across the globe and from multiple company functions and levels
- **Focus group sessions** and live observations of intranet usage in global offices
- **Benchmarking** of award-winning intranets, intranet best practices, and leading edge innovations

This research unearthed consistent themes in terms of what people were thinking about their experiences using the intranet. Flannery shares examples of what the team heard from XL Group employees during the interviews and focus groups:

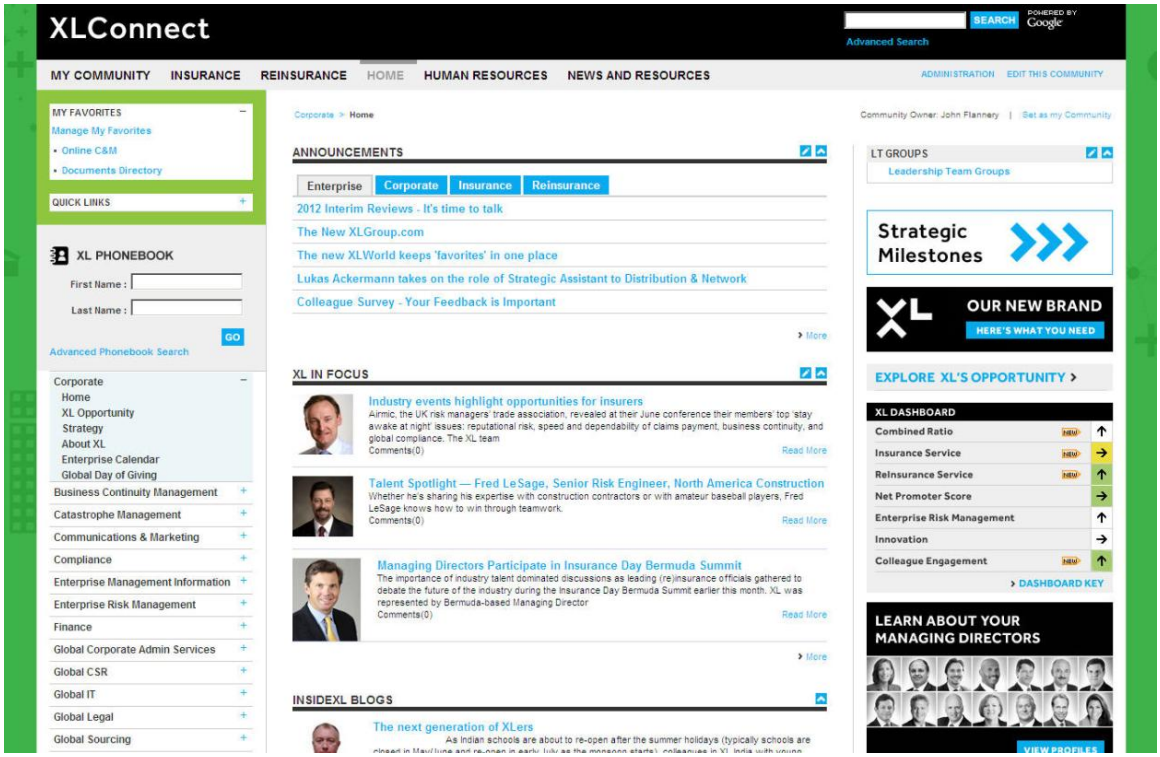
- *"It doesn't feel like an organization trying to get things done."*
- *"People from different groups miss out on info."*
- *"The portal doesn't draw me in; it feels like it's some people trying to tell me stuff vs. people working together."*
- *"The portal displays so much information, users can't find any information. Not an effective tool."*
- *"We need to empower every manager of XL and make them feel more a part of the company."*
- *"Connecting people in the organization is more and more important."*

Facing Down Challenges

The team faced many challenges throughout the project. Flannery explains how these played out:

- **Content strategy/IA:** "Content strategy/IA was a major challenge due to XL's complexity, despite our relative size. The value of taxonomy was little understood outside of the core team, and few business people fully grasped the vision of the new intranet's clear dependence on metadata/tagging. The core team utilized consulting resources to do basic tagging across all content items. The taxonomy and metadata schema will require ongoing work as well as publisher education."

- **Change management:** "Change management was a major consideration. For example, we considered whether or not the new site would be introduced all at once with a big bang approach or incrementally as new features were unveiled. Ultimately, the team decided a big bang approach best suited reinforcing XL's burgeoning culture and could be well managed with sufficient planning and resources."
- **Technology:** "The technology implementation complexity was not fully appreciated and time to execute underestimated."
- **Uneven reception:** "The rollout saw a varying response—from an enthusiastic embrace to dragging of feet. These responses fell in line with demographics, geography/culture, and business areas (active team players vs. those who sat on sidelines). A multi-faceted training and top-down and bottom-up advocacy program helped to accelerate the adoption cycle."

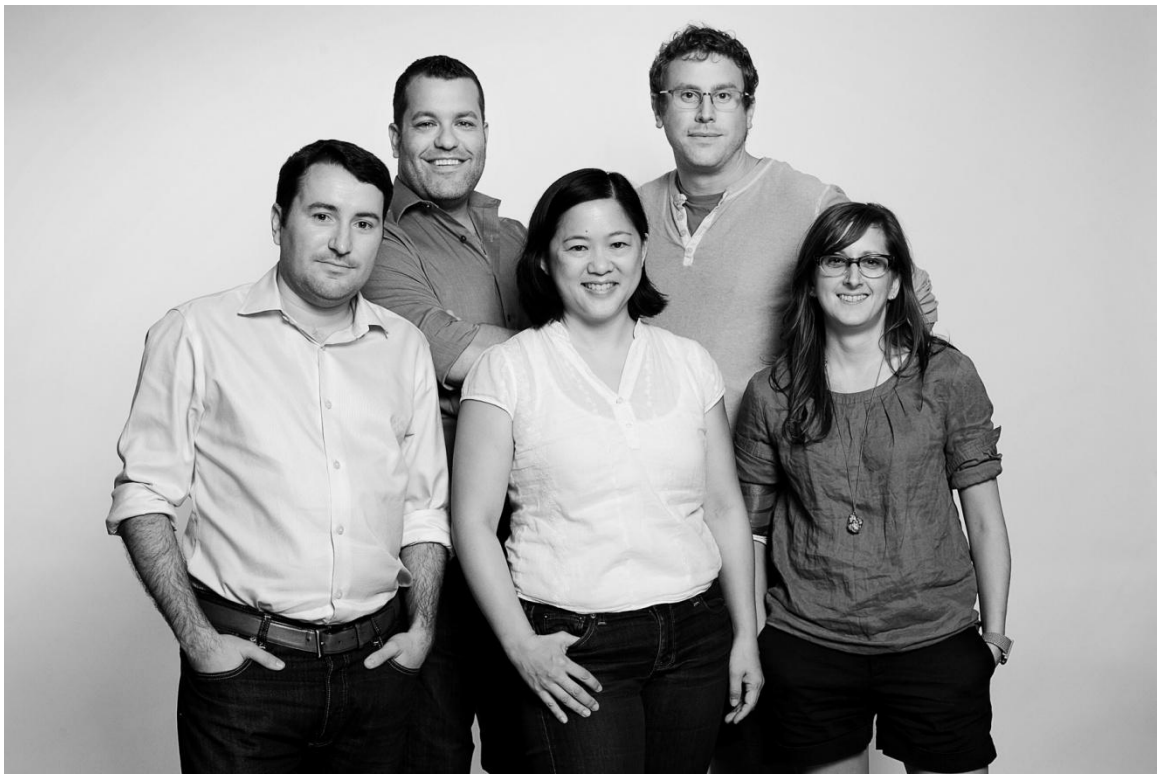


Pictured: The old portal was a source of much frustration for XL employees. Early research indicated that the frustration centered on poor organization and an inability to find content; users felt that the portal displayed so much information, that they couldn't find any information.

INTRANET TEAM



Pictured: The XL Group core intranet team (back row, left to right): Marcy DeMassa, Satvinder Khurana, Shahar Tamari, Tom Paterno, Arvind Popli, William Piedmont, Meera Dharmalingam, Clint San Antonio, and Sangeeta Patel; (front row, left to right): Adam Worobec, Igor Dynkin, Chru Singh, John Flannery, Rich Williams, and Puneet Gupta.



Pictured: The HUGE Brooklyn team (left to right): Chris Michaud, Brock Boddie, Leala Abbott, Lilie Chang, and Felipe Memoria.



Pictured: The HUGE Rio team (left to right): Rafael Gomes, Junior Simões ("Junimba"), José Roberto Coccorese ("Zero"), Sergio Salvador, Fabrício Marchezini, João Paulo Teixeira ("JP"), Leandro Brasil ("Led"), and João Mermolia.

GOVERNANCE

Ownership

Responsibility for the intranet lies with Online Communications and Marketing. The Information Technology group manages the technology platform. Both functions provide complimentary and closely aligned teams, each focused on daily intranet management. People from across the organization are responsible for content publishing.

The intranet's user experience has been greatly influenced by its residence within Online Communications and Marketing. "Online Communications and Marketing is responsible for those aspects of the intranet outside technical execution and management," says Flannery. "As expected, given this ownership, there is a strong emphasis on user experience, design, branding, and communications. However, developing the strong product design and development backgrounds in the group enhances that discipline's approach to satisfying the needs and desires of users and creates a broader mindset within the core teams. Content quality, publisher training, taxonomy/metadata, and search optimization are all areas of ongoing knowledge and skill development within the core teams—and critical with the new intranet."

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Core team	• Site usability, stability, enhancements, audits, reporting, governance, taxonomy/metadata, search optimization, training, service
Group owners	• Maintenance of Group content accuracy and currency
Communications	• Maintenance of the News and About XL sections publishing
HR	• Maintenance of HR content
Employee	• Dashboard image, Profile, updates

Working with Agencies

Given the aggressive timeline, the team sought out the skills of a full-service design and technology firm. They found that in HUGE. Additional consultants were brought in to compliment the team and to address specific needs. The agencies played various roles:

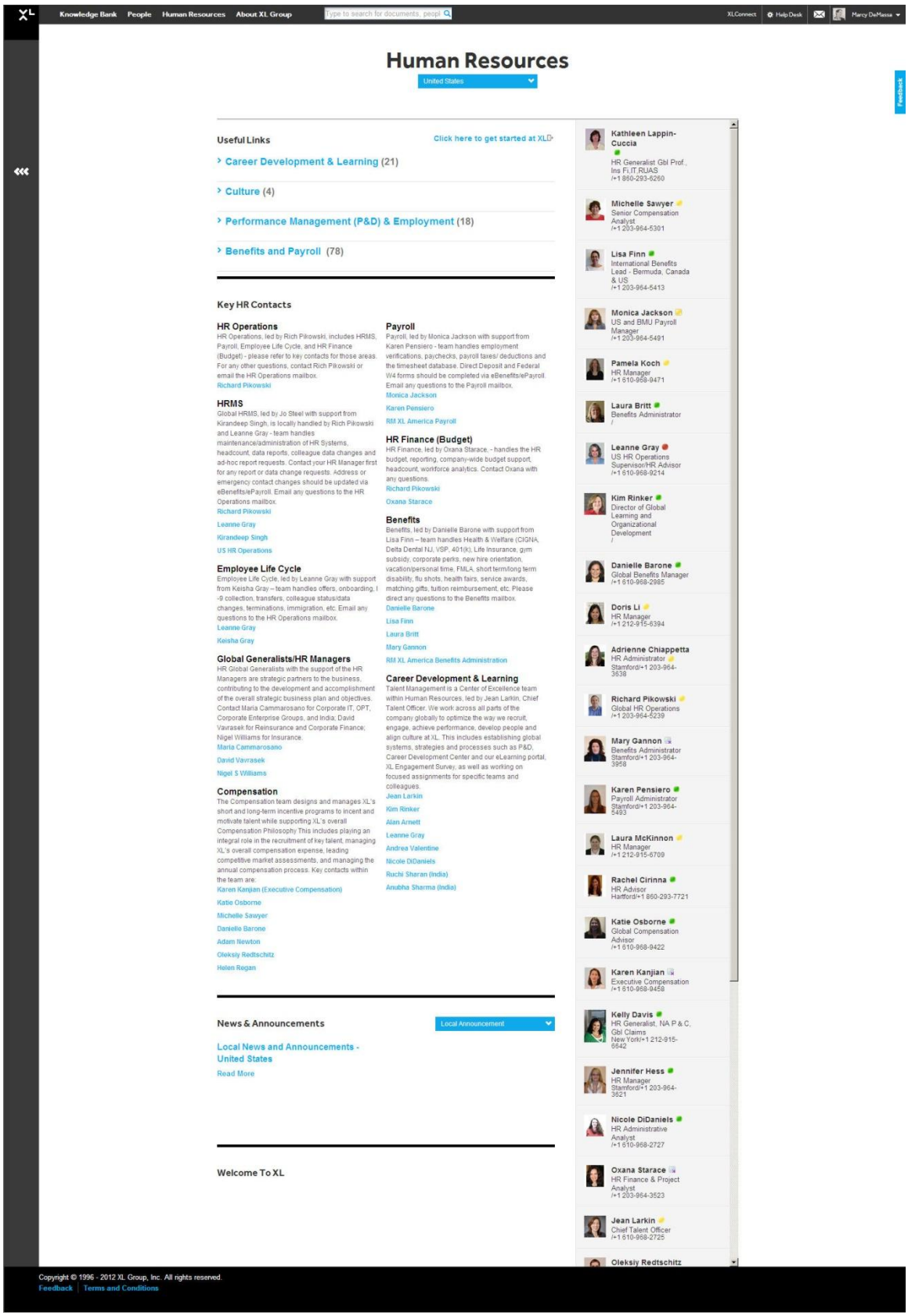
- **HUGE:** research and analysis, vision and strategy, and design, development
- **Tallan**: development (through HUGE)
- **Prescient:** benchmarking and stakeholder education
- **Intranet Benchmarking Forum:** benchmarking and stakeholder education
- **Found Studio:** design consulting
- **Alex Snell:** content strategy consulting; worked with Eloquor to define the taxonomy and metadata schema, as well as the knowledge bank structure
- **Eloquor:** content cleanup/tagging; also helped clean up existing site content and apply metadata to optimize findability
- **Roberts Golden:** defined change management plan and provided additional bandwidth to execute against the plan
- **DapperText:** screen casting (to help with adoption)

USERS

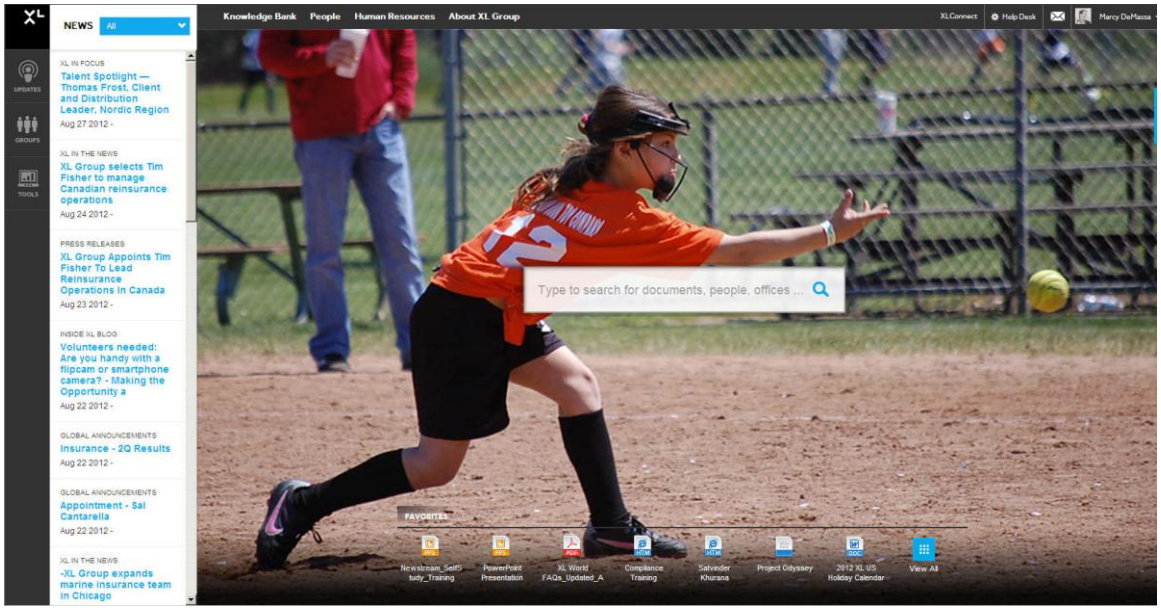
The XL Group intranet's primary focus is supporting underwriting professionals in their decision-making and daily operational work. This group is the priority user group for the intranet because they are the primary drivers of revenue within the organization.

Underwriting functions are conducted through 35 businesses that offer more than 150 products across global jurisdictions. These employees navigate complex local risk factors, legal regulations, and financial considerations.

The intranet also focuses on supporting the productivity and effectiveness of support functions (such as actuarial, Legal, Compliance, IT, and marketing) as their jobs impact underwriting efficiency.


Knowledge Bank
People
Human Resources
About XL Group
Type to search for documents, people
XLConnect
Help Desk
Marcy DeMasse
Human Resources
United States
Feedback
Useful Links
Click here to get started at XL
Career Development & Learning (21)
Culture (4)
Performance Management (P&D) & Employment (18)
Benefits and Payroll (78)
Key HR Contacts
HR Operations
HR Operations, led by Rich Pikowski, includes HRMS, Payroll, Employee Life Cycle, and HR Finance (Budget) - please refer to key contacts for those areas. For any other questions, contact Rich Pikowski or email the HR Operations mailbox.
Richard Pikowski
HRMS
Global HRMS, led by Jo Steel with support from Kirandeep Singh, is locally handled by Rich Pikowski and Leanne Gray - team handles maintenance/administration of HR Systems, headcount, data reports, colleague data changes and ad-hoc report requests. Contact your HR Manager first for any report or data change requests. Address or emergency contact changes should be updated via eBenefits/ePayroll. Email any questions to the HR Operations mailbox.
Richard Pikowski
Leanne Gray
Kirandeep Singh
US HR Operations
Employee Life Cycle
Employee Life Cycle, led by Leanne Gray with support from Keisha Gray – team handles offers, onboarding, I-9 collection, transfers, colleague status/data changes, terminations, immigration, etc. Email any questions to the HR Operations mailbox.
Leanne Gray
Keisha Gray
Global Generalists/HR Managers
HR Global Generalists with the support of the HR Managers are strategic partners to the business, contributing to the development and accomplishment of the overall strategic business plan and objectives. Contact Maria Cammarosano for Corporate IT, OPT, Corporate Enterprise Groups, and India; David Vavrasek for Reinsurance and Corporate Finance; Nigel Williams for Insurance.
Maria Cammarosano
David Vavrasek
Nigel S Williams
Compensation
The Compensation team designs and manages XL's short and long-term incentive programs to incent and motivate talent while supporting XL's overall Compensation Philosophy This includes playing an integral role in the recruitment of key talent, managing XL's overall compensation expense, leading competitive market assessments, and managing the annual compensation process. Key contacts within the team are:
Karen Kanjian (Executive Compensation)
Katie Osborne
Michelle Sawyer
Danielle Barone
Adam Newton
Oleksiy Redtschitz
Helen Regan
Payroll
Payroll, led by Monica Jackson with support from Karen Pensiero - team handles employment verifications, paychecks, payroll taxes/ deductions and the timesheet database. Direct Deposit and Federal W4 forms should be completed via eBenefits/ePayroll. Email any questions to the Payroll mailbox.
Monica Jackson
Karen Pensiero
RM XL America Payroll
HR Finance (Budget)
HR Finance, led by Oxana Starace, - handles the HR budget, reporting, company-wide budget support, headcount, workforce analytics. Contact Oxana with any questions.
Richard Pikowski
Oxana Starace
Benefits
Benefits, led by Danielle Barone with support from Lisa Finn – team handles Health & Welfare (CIGNA, Delta Dental NJ, VSP, 401(k), Life Insurance, gym subsidy, corporate perks, new hire orientation, vacation/personal time, FMLA, short term/long term disability, flu shots, health fairs, service awards, matching gifts, tuition reimbursement, etc. Please direct any questions to the Benefits mailbox.
Danielle Barone
Lisa Finn
Laura Britt
Mary Gannon
RM XL America Benefits Administration
Career Development & Learning
Talent Management is a Center of Excellence team within Human Resources, led by Jean Larkin, Chief Talent Officer. We work across all parts of the company globally to optimize the way we recruit, engage, achieve performance, develop people and align culture at XL. This includes establishing global systems, strategies and processes such as P&D, Career Development Center and our eLearning portal, XL Engagement Survey, as well as working on focused assignments for specific teams and colleagues.
Jean Larkin
Kim Rinker
Alan Arnett
Leanne Gray
Andrea Valentine
Nicole DiDaniels
Ruchi Sharan (India)
Anubha Sharma (India)
News & Announcements
Local Announcement
Local News and Announcements - United States
Read More
Welcome To XL
Kathleen Lappin-Cuccia
HR Generalist Gbl Prof., Ins FI,IT,RUAS
/+1 860-293-6260
Michelle Sawyer
Senior Compensation Analyst
/+1 203-964-5301
Lisa Finn
International Benefits Lead - Bermuda, Canada & US
/+1 203-964-5413
Monica Jackson
US and BMU Payroll Manager
/+1 203-964-5491
Pamela Koch
HR Manager
/+1 610-968-9471
Laura Britt
Benefits Administrator
/
Leanne Gray
US HR Operations Supervisor/HR Advisor
/+1 610-968-9214
Kim Rinker
Director of Global Learning and Organizational Development
/
Danielle Barone
Global Benefits Manager
/+1 610-968-2985
Doris Li
HR Manager
/+1 212-915-6394
Adrienne Chiappetta
HR Administrator
Stamford/+1 203-964-3638
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Mary Gannon
Benefits Administrator
Stamford/+1 203-964-3958
Karen Pensiero
Payroll Administrator
Stamford/+1 203-964-5493
Laura McKinnon
HR Manager
/+1 212-915-6709
Rachel Cirinna
HR Advisor
Hartford/+1 860-293-7721
Katie Osborne
Global Compensation Advisor
/+1 610-968-9422
Karen Kanjian
Executive Compensation
/+1 610-968-9458
Kelly Davis
HR Generalist, NA P & C, Gbl Claims
New York/+1 212-915-6642
Jennifer Hess
HR Manager
Stamford/+1 203-964-3621
Nicole DiDaniels
HR Administrative Analyst
/+1 610-968-2727
Oxana Starace
HR Finance & Project Analyst
/+1 203-964-3523
Jean Larkin
Chief Talent Officer
/+1 610-968-2725
Oleksiy Redtschitz
Copyright © 1996 - 2012 XL Group, Inc. All rights reserved.
Feedback | Terms and Conditions

Pictured: The HR page, which includes a selection for country, contacts, and links to the essential HR functions and documents.



Pictured: This screen shows the favorites that can be added on the bottom of the portal homepage. Favorites provide quick access to the frequently used documents, pages, groups, and so on.

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	• Xlworld.xl
Default Status	• XLWorld is the default homepage for all users and cannot be changed.
Remote Access	• Users can access XLWorld via VPN or when logged into XL-issued iPhone and iPad devices. The company's underwriters, business development, and claims employees often work onsite, visiting brokers, clients, and prospects. Additionally, risk-engineering colleagues work extensively onsite at client organizations, where having access to the latest XL news, collaboration "Group" interactions, and information resources is critical.

DESIGN PROCESS AND USABILITY WORK

Design Approach

During the project's first phase, the team leveraged several types of user research. "Initially, we were able to dive into a detailed statistical analysis of the results from an XLConnect employee satisfaction survey from 2010," says Flannery. "This helped us to understand many of the current 'dissatisfiers,' as well as which features and tools were perceived to be most important. We then conducted additional qualitative research."

The first step in this process was to conduct an initial set of phone interviews that helped inform the project's basic hypotheses. The phone interviews were augmented with one-on-one observations to supplement the team's understanding of *what* (content) they accessed and *how* they used the portal. The team also used the interviews to understand how the new portal could help users have the best experience during the workday.

"We concluded our research phase with in-person focus groups conducted in Exton [Pennsylvania], New York, London, Paris, and Zurich," he says. "Overall, we found that there was a lot of frustration with XLConnect. Universally, we discovered that the portal displayed so much information users couldn't find any information."

The team corroborated all user insights in a heuristic evaluation of XLConnect. It was evident that, although the portal had once had a clear architecture, time marched on and the portal stayed the same. "In a fast-paced industry, it had lost its effectiveness," says Flannery. "A defining trait of XLConnect was that each business line managed its own pages within its own structure within the overall structure, leading to the feeling of disorientation whenever employees ventured outside of their immediate zone, and to a lack of usage patterns." Flannery says they found four major issues:

- **Labeling:** Labels often used different words to describe the same thing, as well as the same word to describe different things.
- **Findability:** Obscure link names and redundant pathways made it difficult for employees to find their way.
- **Structure:** The lack of a cohesive structure made it difficult to navigate.
- **Consistency:** Sections were managed inconsistently.

The team used the findings from the user research to define the following use cases, which informed the new design:

- *"I want to find someone who has done X."*
- *"I need access to the latest versions of forms quickly and easily."*
- *"I want to file my expenses."*
- *"I want to see information about my local office/business line, as well as about corporate."*
- *"I need to publish something quickly."*

Optimizing these types of workflows was critical for creating efficiencies that would have a direct effect on user behavior. "Going into the strategy phase, we came to a

conclusion that was no surprise: *Users will try whatever is fastest*," says Flannery. "So, if getting a document from a colleague is faster using a thumb drive than using a complicated, slow, and unreliable network drive system, they will do it, no questions asked. So, we knew our solution had to be intuitive and fast, making it easy to find and share documents, and to find people as well."

Another key realization the team came to was that the intranet had to be as easy and efficient to use as the websites employees use every day. "We also determined that the new portal had to be a tool for the employees—versus XLConnect, which was perceived to be a tool for the company," he says. "There was a great opportunity to make it a more personal and social experience, thereby increasing the adoption."

With the research in hand, it was time for conceptual sketching. For several days in row, a team of designers produced dozens of low-fidelity creative approaches, both on paper—covering the walls of the meeting rooms—and in digital form. Those early designs were put through their paces. They were iterated, changed, reorganized, and "killed" until only a few survived. And then it was time to wireframe.

The team produced 86 wireframes to support the overall architecture and define the user interactions. "During the interaction design phase, it was confirmed that while we were pushing SharePoint to the limit, it was 'challenging, but feasible,'" says Flannery.

"The final design was presented to XL Group in its visual design form, and shows what we call the 'desktop metaphor.' Users can easily search, personalize their workspace, and change the background and mark people and documents as favorites for fast access."

Since the launch, the team has conducted interviews with employees to gauge early responses and try to create a path forward. The response so far has been positive.

"Overall, employees are pleased with the new portal. They are understanding that they can find content and contacts in a consistent fashion by following certain usage patterns," says Flannery, adding that, in interviews, participants said they used a combination of search and the mega-menu to find content and contacts successfully. This success means that one of the team's primary use cases—finding people—is working.

Another research finding is that the new design has fixed the mechanisms for finding content, and that the content itself (and contact information) is also much clearer.

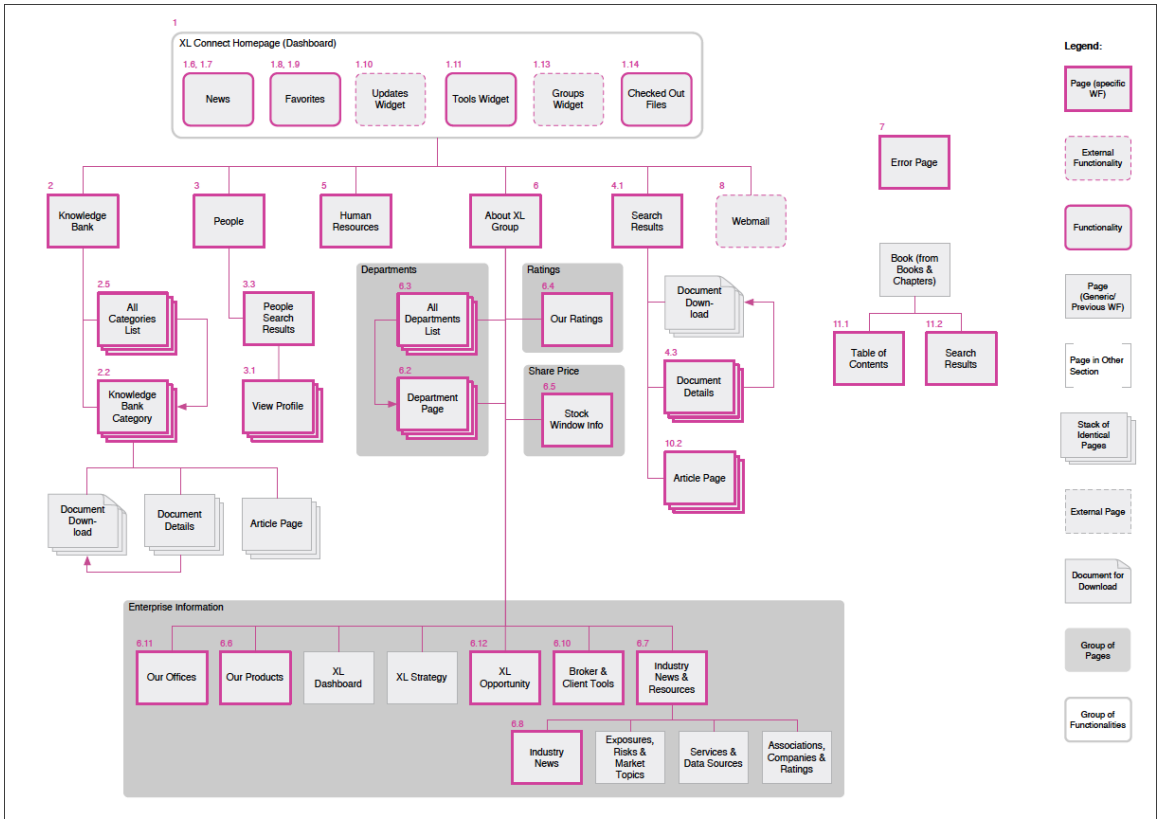
Much of the content still needs to be updated and/or tagged more specifically, which is an ongoing effort. "As more people use search, the relevancy of the results will improve," says Flannery. "Right now, users are struggling a little with the sheer volume of the results but demonstrated that they were able to use the refiners in the left sidebar."

During the post-launch interviews, the team heard many positive initial reactions from users, such as:

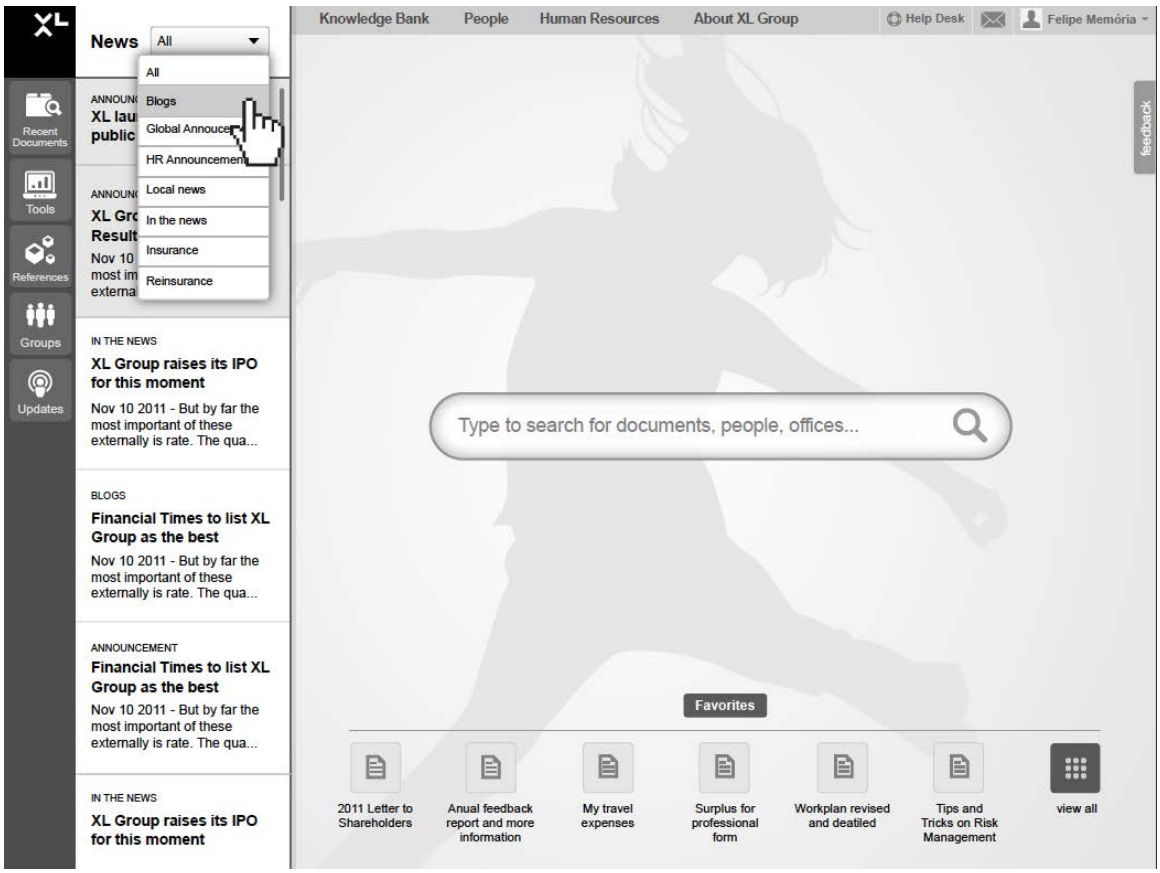
- *"Emotionally, it's just so much better. XLConnect was so stressful."*
- *"Here, you go into one door and get to anything. With XLConnect, you had to go into all these separate doors."*
- *"This works just like Google."*

- *"Pretty cool for an insurance company."*
- *"I use search now. I was not using search on XLConnect because there were all these discrete areas."*

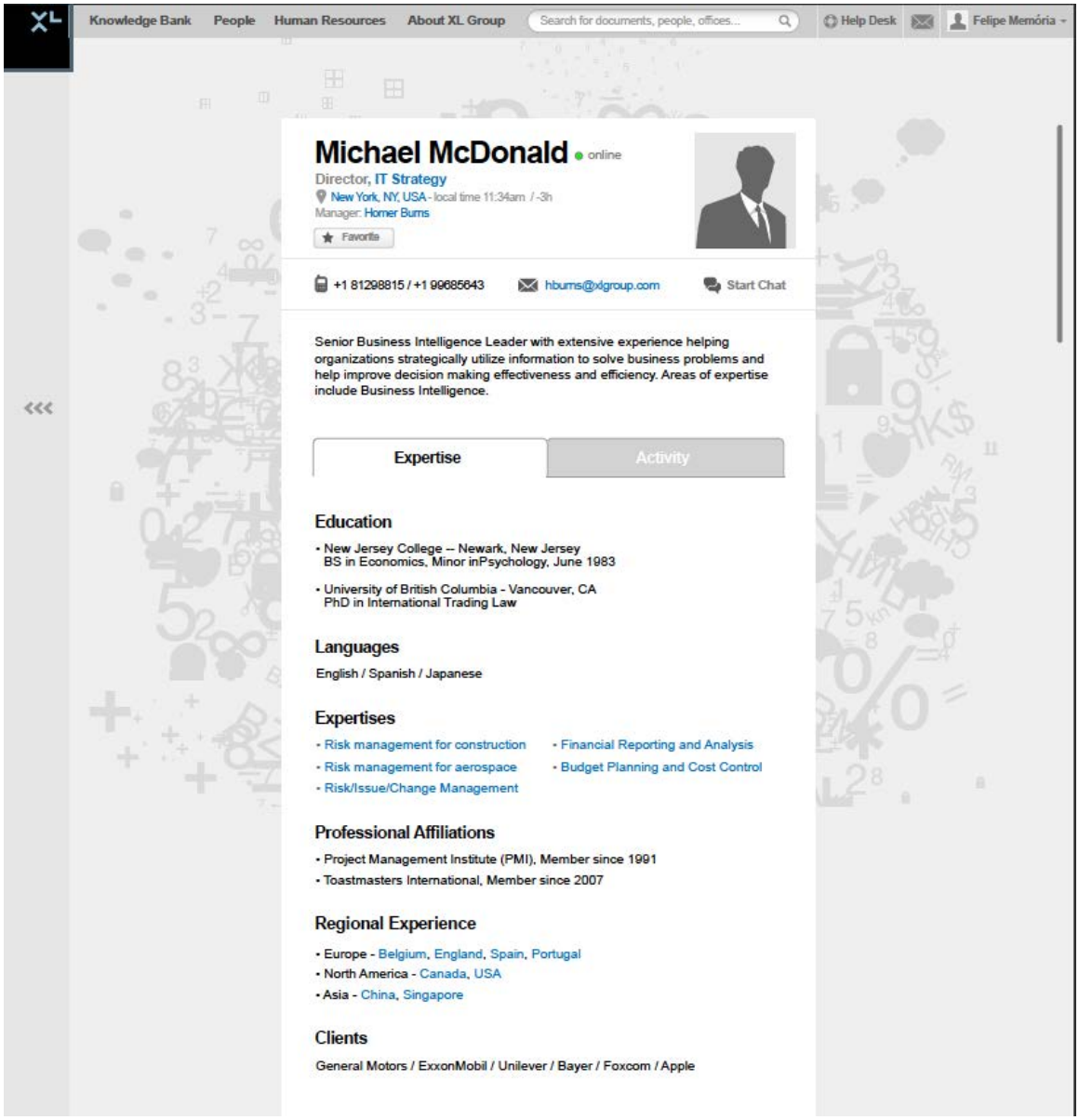
"Generally, for a busy population with no time to participate in training, adoption is happening," says Flannery. "Importantly, we heard, 'I know the best is yet to come. We are still in the early stages.'"



Pictured: The intranet site map.



Pictured: Wireframe of the homepage design, in progress.



Pictured: A wireframe of a profile page.

TIMELINE

INTRANET TIMELINE	
Milestone Date	**Milestone Description**
2002	• Pilot global intranet
2003–2004	• Integrate intranets from acquisitions
2004–2007	• Perform incremental enhancements (during this period, intranet investment and governance floundered)
2008–2010	• Redefined IA, navigation, and design • Improved governance and content-management practices
2010–2011	• Made substantive improvements to internal communications delivery to support strategy • Cosmetic redesign for rebrand • Major content cleanup begins

REDESIGN TIMELINE	
Milestone Date	**Milestone Description**
May 2011	• Begin vendor search
July 2011	• Shortlist HUGE
August 2011	• Leadership decision to fund and contract with HUGE
September 2011	• Initiate both Phase 1 (brand 're-skin') and Phase 2 (holistic redesign)
October–December 2011	• Research and analysis: new vision, design
January 2012	• Design and content architecture defined
February–June 2012	• Content cleanup, tagging, and publisher engagement
February–June 2012	• Technical implementation
July–August 2012	• Testing/validation, ramp-up internal communications
August 8, 2012	• Rollout
August–September 2012	• Former intranet available in 'read-only' mode

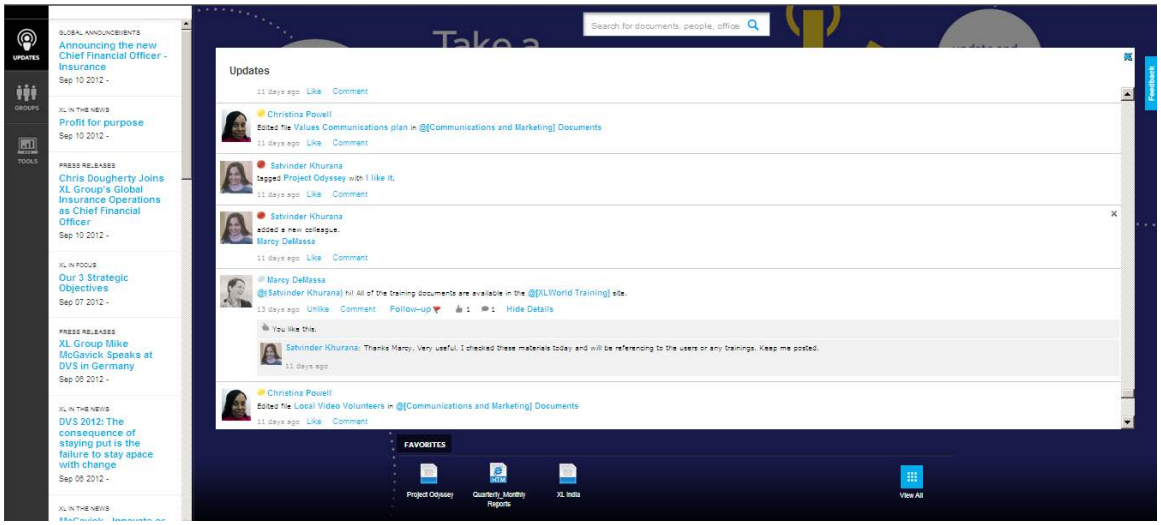
CONTENT AND CONTENT CONTRIBUTORS

The XL team chose to use the SharePoint platform's native content management capabilities. "SharePoint has its own CMS, which is feature rich, and we preferred not to add an additional technology to the platform," says Flannery.

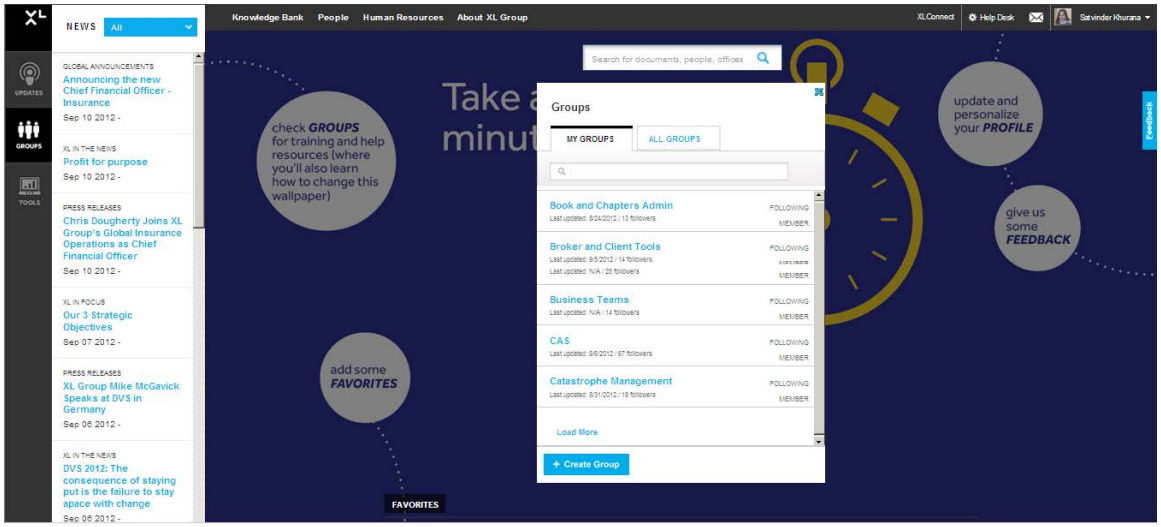
Content is created and published by staff located across the company. "Philosophically, XL sought to empower employees in content publishing towards greater productivity," he says. As a result, content administration varies widely, from loosely governed to more controlled, depending on the content type. All employees can update the public groups and updates section, the central blog (after online training), the dashboard image, and profiles. The *HR*, *AboutXL,* and news areas are more closely controlled through designated publishers. So, review levels vary from no review to tight control through trained resources (for content such as blogs, news, and HR).

The intranet team can accommodate many varied types of publishers because it provides training documents and screen casts, as well as a roster of rotating training sessions online. The team also provides a finite number of templates for content publishers to use, which helps maintain some control. The team is currently creating guidelines for publishing best practices, findability, and usability.

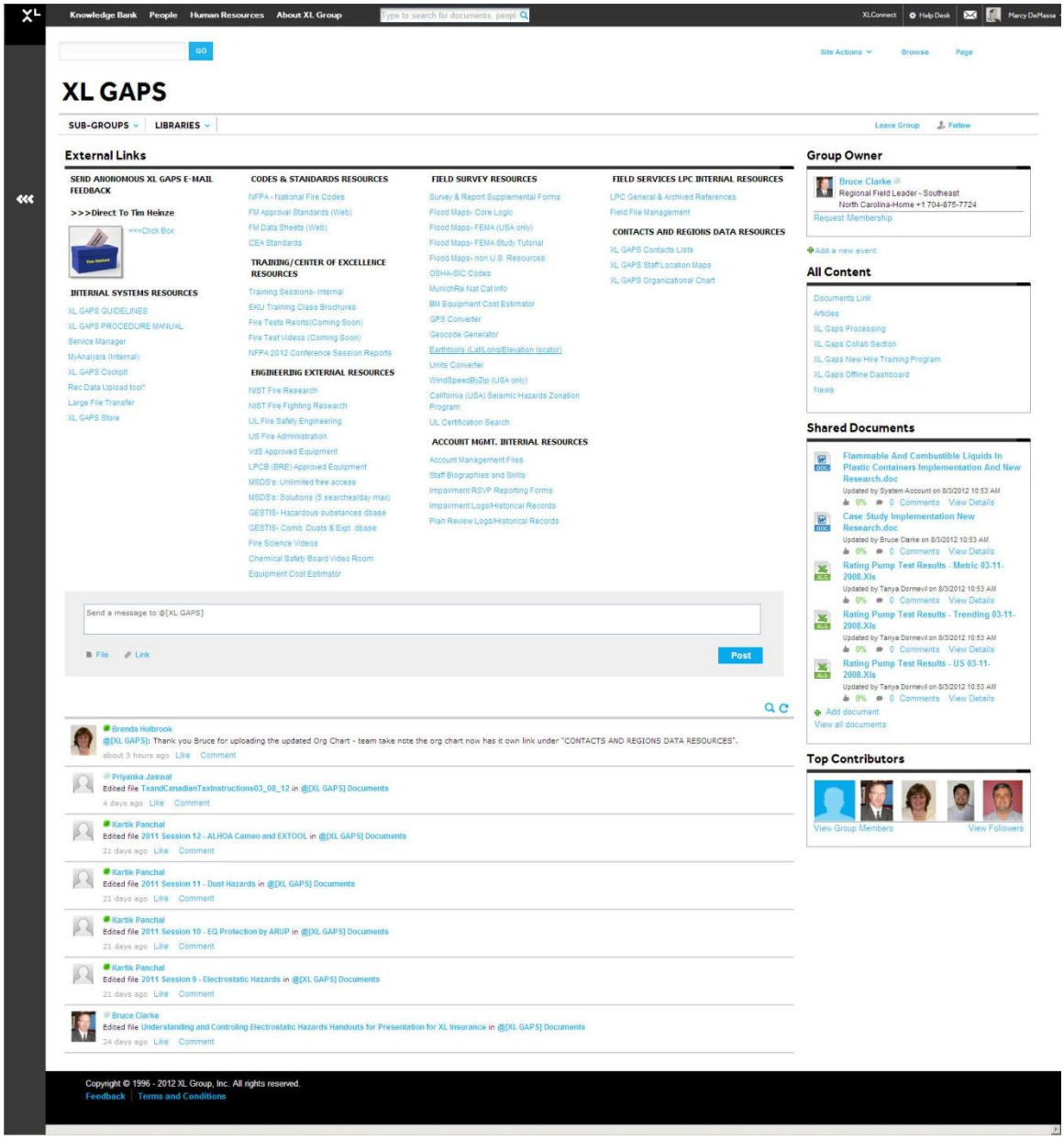
The last line of defense in the continuing effort to keep content fresh and relevant is a rotating audit that the central Online Communications & Marketing team conducts to ensure content is timely, accurate, and relevant.



Pictured: The *Updates* feature lets users update their current status (on projects, for example) and captures activities on the various *Groups* that users belong to.



Pictured: The *Group* widget lists groups that users follow and lets them search group content.



Pictured: A highly customized group site.

CONTENT PERMISSIONS	
Portal Section	**Content Governance Characteristics**
Corporate Portal	• Tightly governed/push content: dashboard, company information, and news
Department Pages/Sites	• Loosely governed, with both static and dynamic content: knowledge management and information sharing
Groups	• Ungoverned/collaborative content
Personal Profile	• Loosely governed, with both static and dynamic content: personal information, and public and private views

TECHNOLOGY

The new XL Group portal was developed using SharePoint 2010. The company's former technology solution was being sunset by the provider, so little effort was made over the past year to provide new features or functionality. "SharePoint has allowed us to implement many new features, especially 'social' features, and functionality," says Flannery.

The other technologies used on the site include:

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and O/S	• DELL Servers running Windows 2008 Server, Brocade Load Balancer, and Cisco Firewall
Bug Tracking/Quality Assurance	• TFS
Content Management Tools	• SharePoint 2010
Search	• FAST
Other Functions	• NewsGator • Vizit

MOBILE

The site is optimized for iPhone and iPad, which are heavily used by the company's key leadership and revenue-generating staff.

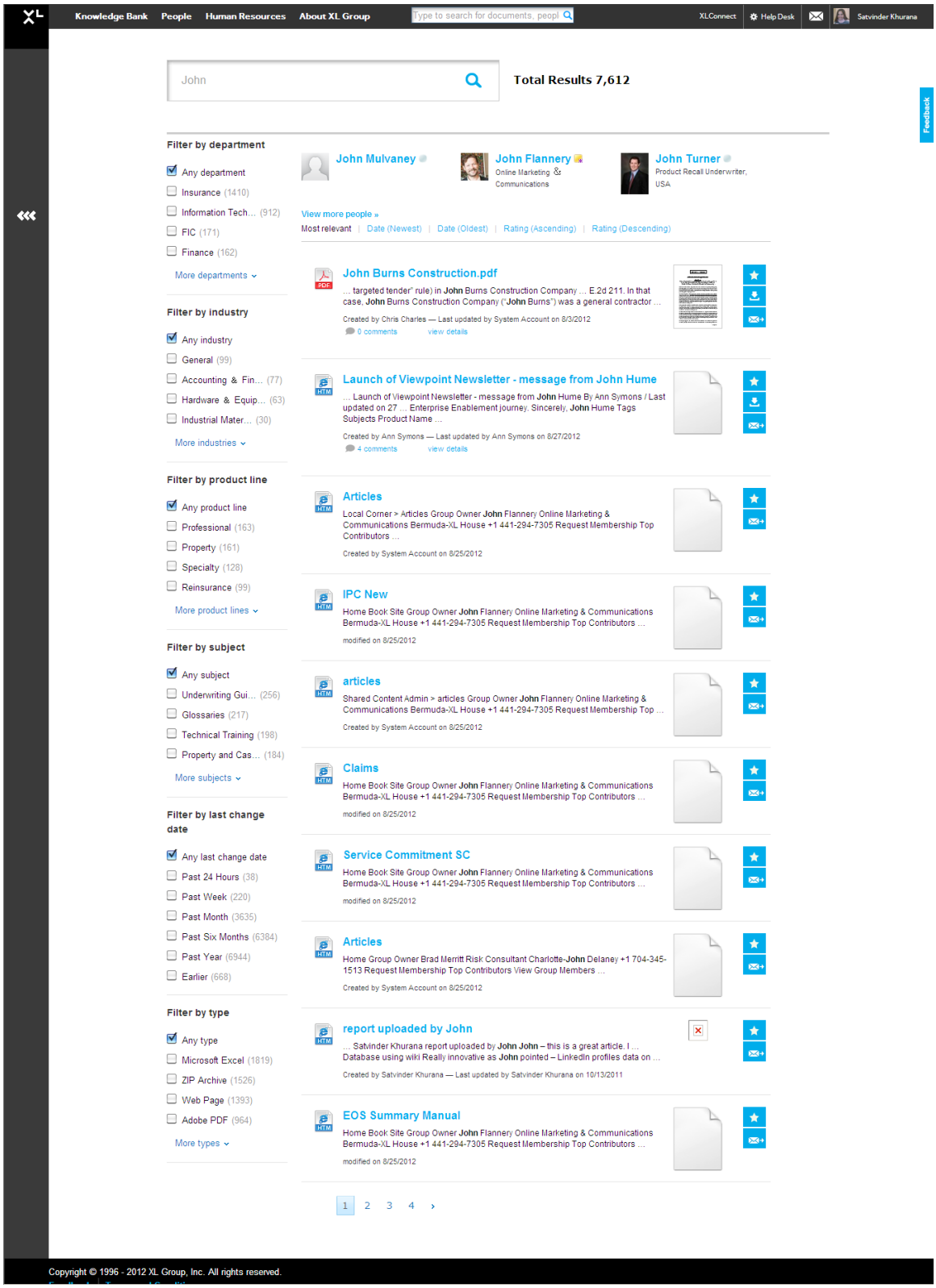
The team selected the mobile features set based on features that optimized the workflow of XL employees who work onsite at client locations. Those features include:

- **Group sites:** for collaborating within departments, teams, and communities of practice/projects
- ***Updates* wall:** for keeping up-to-date with colleagues
- ***XL News*:** for keeping up-to-date with the organization
- **Knowledge bank**
- **People search**
- **Favorites**

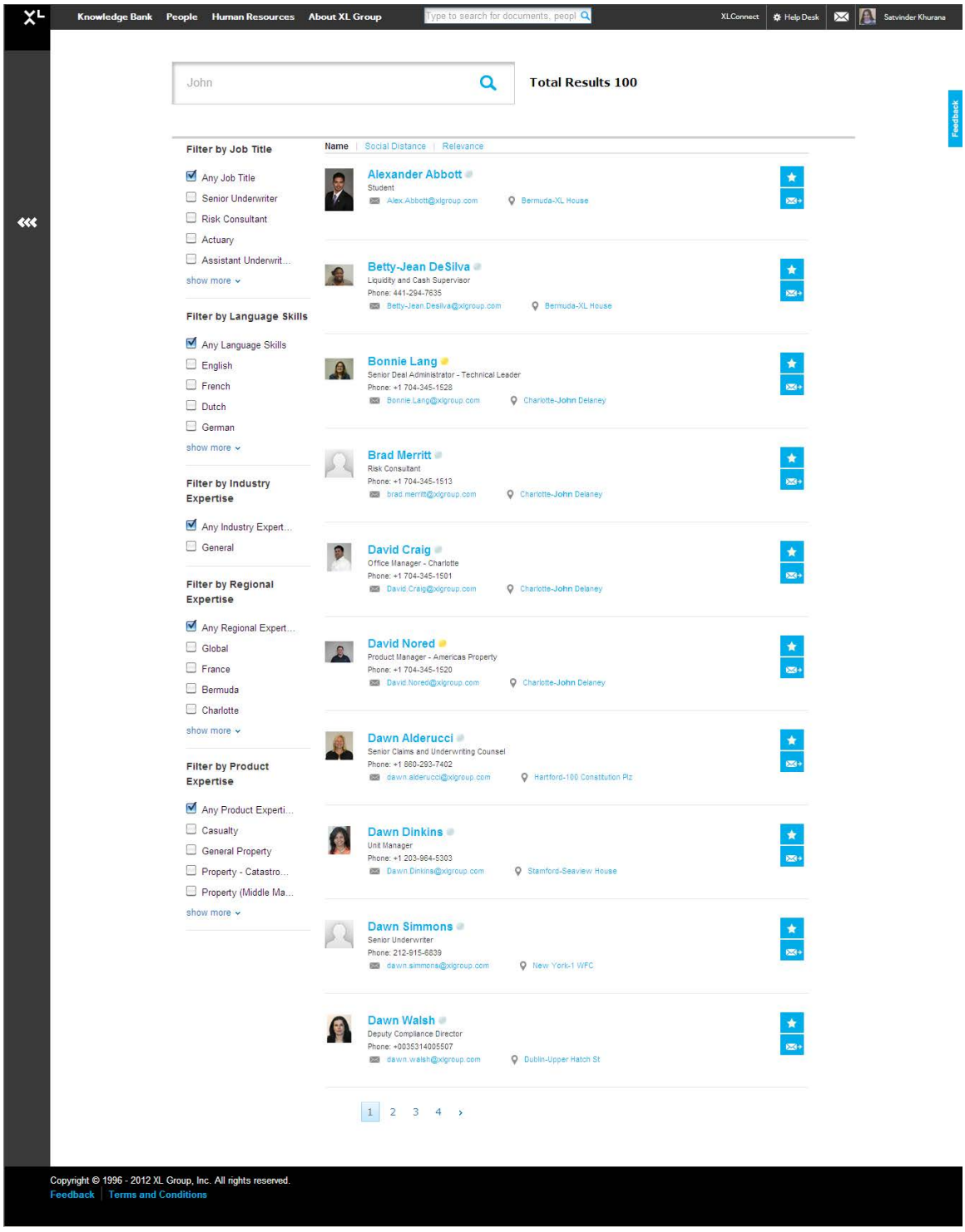
SEARCH

The XL Group intranet team reviewed many of the leading search technologies—including FAST, Autonomy, Endeca, and Google—but the integration with SharePoint led the team to choose FAST.

XL proactively uses tagging, metadata, and taxonomy to refine search results, and well as reacting to user suggestions for best bets.



Pictured: One of the options available to search for people. Entering the person's name results in people with that name being brought to the top.



Pictured: The people search results and filtering options.

RESULTS AND ROI

The team designed the new XL Group portal to improve upon the past portal in terms of:

- How efficiently employees find and use documents
- How efficiently and effectively employees use the portal to search for potential collaborators
- How quickly company news and communications are distributed
- How well the portal encourages collaboration
- How often employees use the portal

Some signs that these efforts have paid off include:

- **Increased participation:** The company has seen an increase in many participation numbers, including the number of: postings on group sites; shared documents; active group site members; new requests for group sites; new requests for access rights to group sites, and blog posts.
- **A flipped information-finding ratio:** There has been in increase in the number of searches and a corresponding decrease in the number of abandoned searches.
- **Increased engagement in news and announcements:** There has been a dramatic increase in the number of page views for news/announcement articles during particular time periods and a corresponding jump in the amount of feedback/comments posted to those viewed items.

XL Group's success with the intranet is perhaps a result of both the redesigned portal's ability to effectively meet people's needs and the company's full-court press in the launch communication efforts. The team realized that with XL's size and globally dispersed workforce, the release of a new intranet necessitated a multi-phased, multi-vehicle communications approach to really get users on board. These efforts included:

- Portal naming contest
- Countdown to launch email campaign
- Live orientation sessions
- Collaborative champions (ambassadors to help users transition)
- Launch videos
- "How we got here" articles
- "What to expect on launch day" article
- Pre-launch email
- Launch day message

If all this seems like a lot of effort, it was. But, by all accounts, the team's communications efforts were highly successful. "We built a sense of anticipation and increased colleague interest in the new XLWorld," says Flannery. "On launch day, more users than ever logged on to our system."

And, in the classic "be careful what you wish for" scenario, this dramatic traffic surge proved to be both good and bad. Although the system was designed for "vastly increased" demand, enthusiastic colleague usage far exceeded even the team's most

liberal estimates. "Our success in developing and communicating about our new system resulted in access problems for colleagues. The team worked feverishly to correct the problems," he says.

"With the system issues we experienced following launch, the team developed a message to inform colleagues about exactly what happened, the steps taken to correct it, and to also reiterate key messages about the search function and how to effectively use it. In an effort to carefully test the system, we rolled this message out in a staggered fashion (across time zones) to mitigate the effect of potential usage spikes."

Other routine post-launch communications are planned, including:

- reminders about the available training resources;
- an article on search best practices (tips on how to use tagging, metadata, ratings, etc.);
- an article on groups best practices; and
- live Q&A webinars, which are open call-ins for colleagues to ask specific technical and non-technical questions (content from these will be captured in the living FAQ document).

LESSONS LEARNED

Flannery shares some of the team's lessons learned:

- **Don't underestimate design at any stage.** Even during a pilot phase, a feature's design can heavily affect how it is received. The XL group learned this the hard way with the Group collaborative sites. "As a key goal—with close executive attention—the Group collaborative sites carried high expectations. Initial deliverables in pilot lacked user experience/design attention. XL leadership balked at the capability initially—until the functionality and features became more intuitive and easy to use. Subsequently, the group sites realized diverse use—from Investment's tracking global macro/micro economic trends to manage portfolios to Marketing's version control around production of brand and advertising materials."
- **Keep communicating.** "The team sought to over-communicate to publishers, the overall enterprise, and leadership. Recognizing this was a dramatic design change from the former intranet, based on a paradigm of departments and documents, the team led frequent webinar sessions, Q&As, and an ongoing, regular email campaign. Coupled with videos, screen casts, and formal training sessions/materials, the team endeavored to well support the enterprise."
- **Choose the design approach that works best for your needs.** "Iterative approaches to redesigns have their place. However, dramatic change does as well and, with adequate justification and organizational alignment, is appropriate. With leadership support and broad organizational involvement, don't shy from moving rapidly through design. Yet take the time to pilot key functionality, work through iterations, and utilize real-life use cases."
- **Content migration needs to be well resourced and defined.** "Given the challenges we faced in publisher engagement within several business areas, we would consider not migrating their content from the former intranet—but

instead start with a clean slate. Rather than move thousands of outdated and inaccurate content items, ask the business to plan to populate the new intranet with only what they need now. For those areas willing and able to clean, archive, and rewrite content—then by all means migrate. It's a demanding process to be successful."

Allianz Australia

Using the intranet: Allianz Australia is one of Australia's largest general insurers, a leading private workers-compensation and life insurer, delivering a wide range of personal, commercial, and corporate insurance products and services. Allianz proudly serves more than 2 million policyholders and more than half of Australia's top-50 *Business Review Weekly* listed companies.

Headquarters: Sydney, Australia

Number of employees the intranet supports: 3,800

Company locations: Australia and New Zealand

Locations where people use the intranet: All Australian states and New Zealand

Design team: In-house, two people formed the core Intranet Team, along with two Lotus Notes developers and the Group Manager, Digital. Subject Matter Experts (SMEs) across each business unit were consulted as needed. Externally, the digital agency First provided the design elements.

In-house: Zoe Salonitides, Intranet Manager; Ida Tamabadlbo, Intranet Specialist; Patrick Brownsberger, Group Manager, Digital Business; Greg Loundar, Analyst Programmer; Mike Brown, Analyst Programmer

First agency: Ben Gerholt, Digital Strategy; Lachlan Pottenger, Creative Director

SUMMARY

Thorough planning of the best navigational elements and a well-defined use of screen real estate, the Allianz Australia intranet, *collabor8*, makes it a breeze for employees to find what they need, get up to speed with their work, and stay informed about the latest happenings at the organization and around the world.

At the top of the homepage, a carousel appears with some of the latest promotions for employees. This feature is about half the height of a typical carousel—or hero image, for that matter. Using less vertical space means this content is given prominence on the page but the designers were able to still free up more screen real estate on the homepage for other features.

The carousel includes an image and clearly written text, along with a call to action: a *Submit here* link that asks employees to send their thoughts and feedback about the latest Company Team Briefing.

The carousel's navigation appears on the right side, with three buttons that are shrunken versions (thumbnails) of the main image in each the carousel frames. The content of these is easy to recall after seeing the image in the main frame. The selected button is indicated with a frame and an arrow on the button's left side. These buttons appear clickable due to their shape, size, and the context in which they're placed.

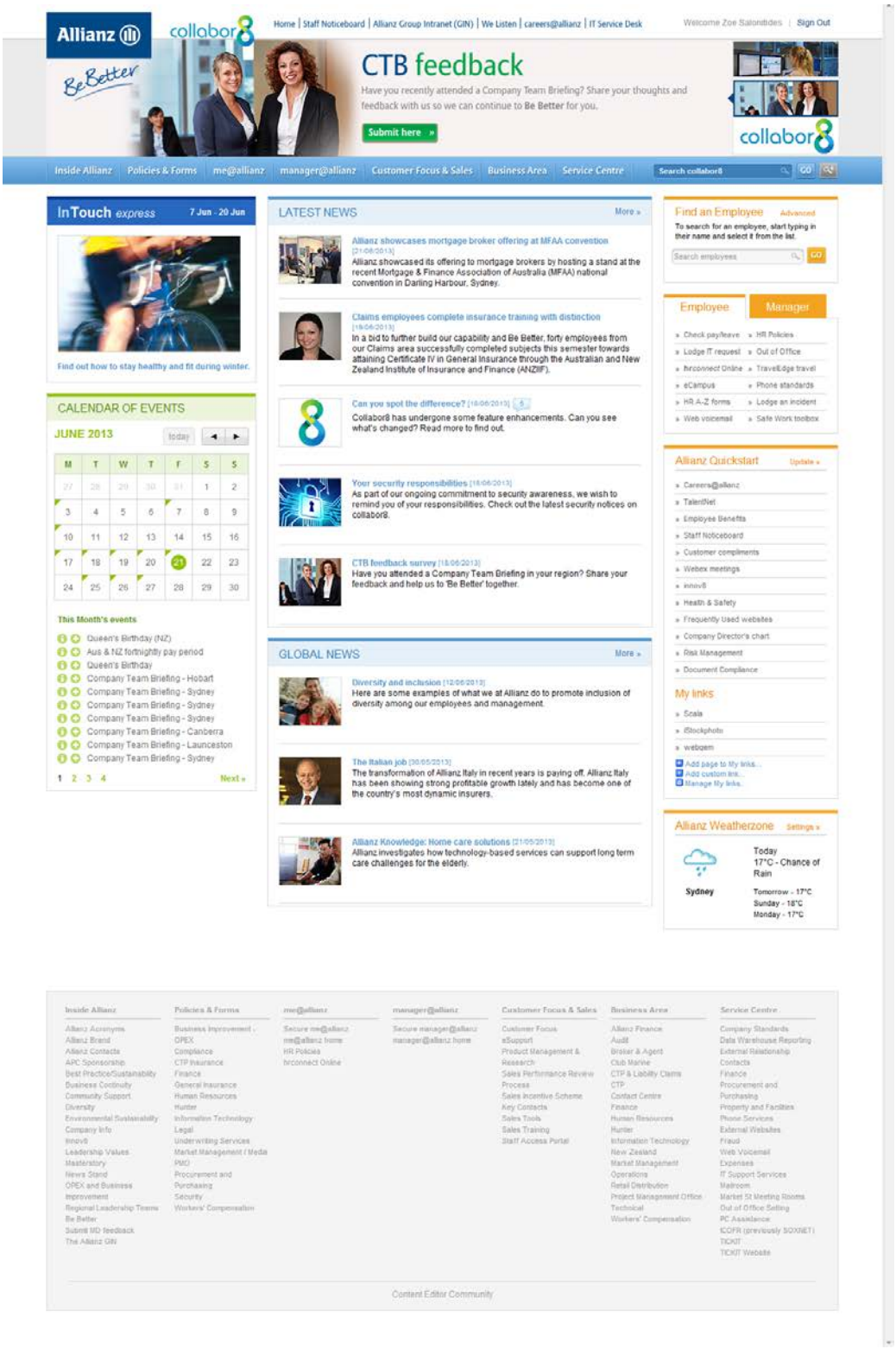
Latest News wins a prime section on the homepage and displays the five most recent internal news items. The title of each item is a link to the full story, which serves a dual purpose. First, it saves space on the page, eliminating the need to add another link (such as *Full Article*) to get to the article. Second, our eyetracking research shows that people scan pages for items of interest.[1] When section headings and links look different than normal text—for example, when they are bolded, a different color, or larger—people scan to these stronger-looking words. They then read the text and

[1] *How People Read on the Web: The Eyetracking Evidence* by Kara Pernice, Kathryn Whitenton, and Jakob Nielsen. Download report: http://www.nngroup.com/reports/how-people-read-web-eyetracking-evidence/

decide if they want to read on. So, when links contain information-bearing words—such as *Allianz showcases mortgage broker offering at MFAA convention,* or *Your security responsibilities,* or *CTB feedback survey*—it makes it easy for people to find them and then decide if they want to read the article.

Following the headline are the date the news was posted, a related image, and a brief article summary. All of these elements make the latest news easy to scan and read.

The *Global News* section occupies almost as much space on the homepage as the *Latest News* does, with three items presented. These items contain information specific to Allianz in news from around the world.



The homepage on Allianz Australia intranet, collabor8, gets users started quickly with internal news, global news about the organization, and links to content employees need.

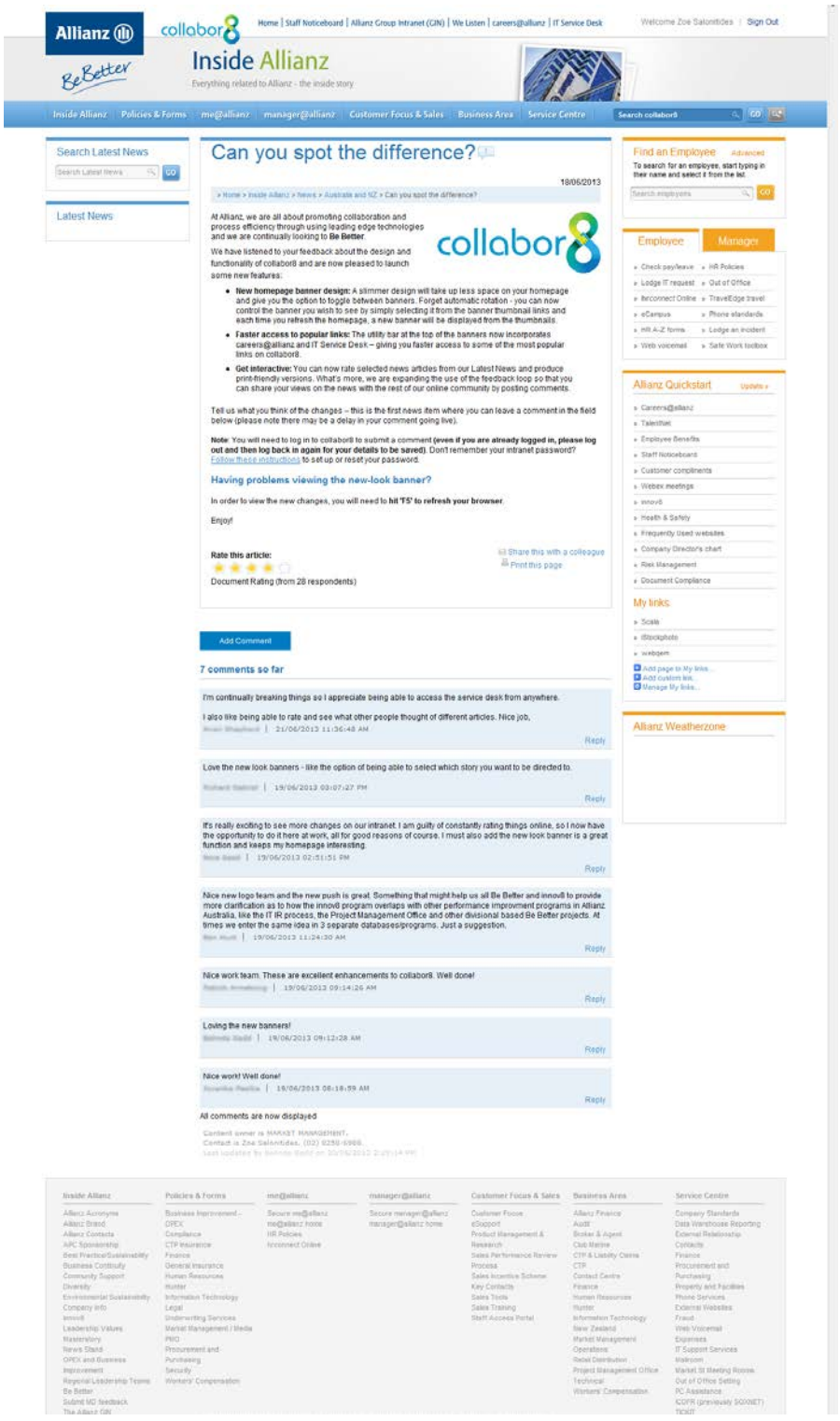
Upon clicking through to a news page, users are greeted with a large article title, which matches the name of the link they clicked to get there. This confirmation, as well as the breadcrumb trail at the top of the page, helps employees feel grounded as they navigate collabor8.

The number of comments that have been made about the article appears in a bubble to the right of the title. This is an immediate indication of how interested people are in the article. It also immediately reminds employees that they, too, can comment. The *Add Comment* button appears at the end of the article, followed by the comments, who made them, and when they were made. The heading, *comments so far,* indicates that people can still comment on the article, subtly suggesting that employees participate. The *All comments are now displayed* notice appears after the last comment, and helps prevent people from trying to find more comments that don't exist.

Other social features are also offered, including *Rate this article* (with five or fewer stars) and a *Share this with a colleague* link. On intranets, it's helpful to specify that news should (or can) be shared only with colleagues, and not with people outside the organization.

The collabor8 designers report that these collaborative features have been "a huge success!"

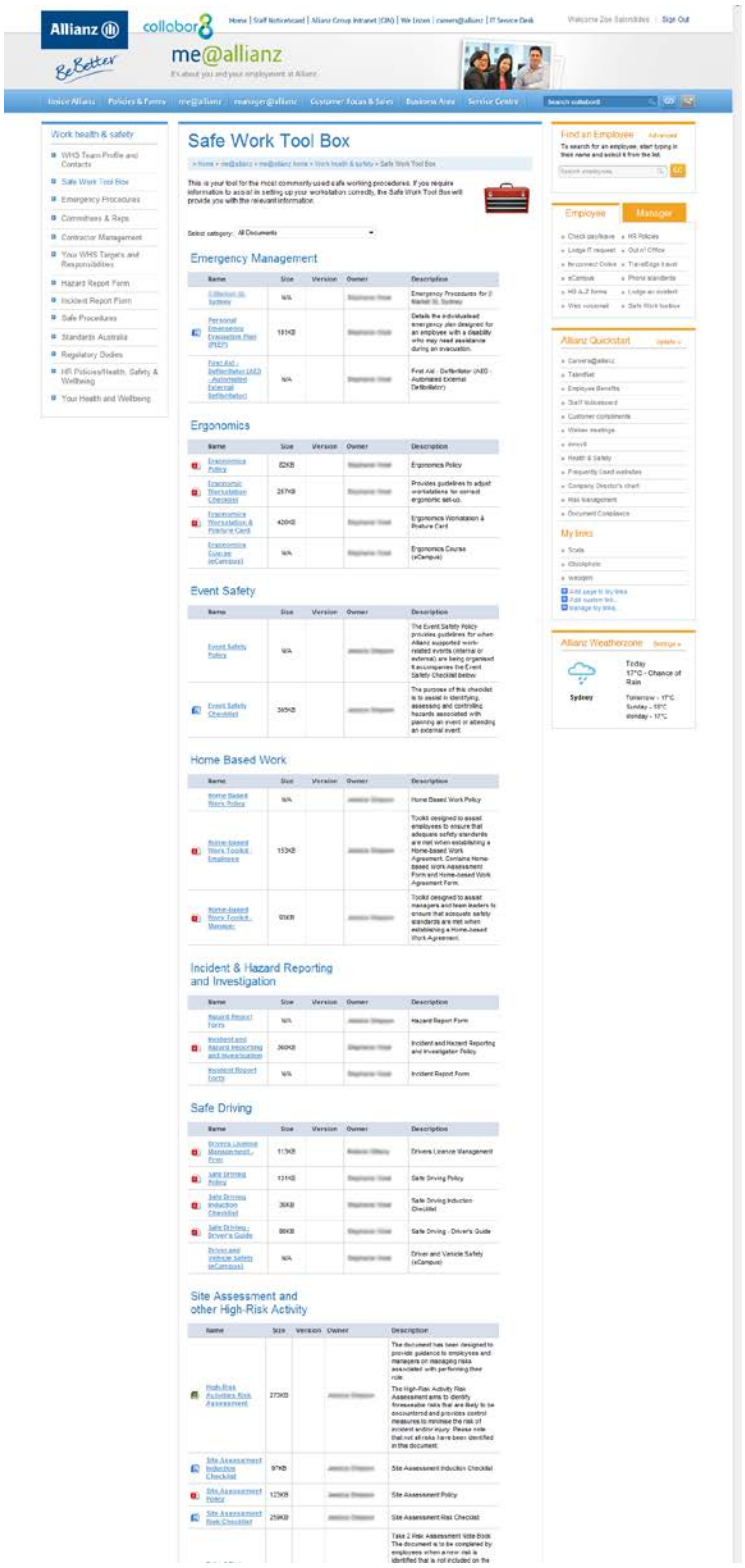
The news articles themselves are nicely formatted. The column of text is narrow, making it easy to read. The articles also use subheadings to help ground readers, bold text to highlight important words, bullets to clearly display key concepts, and in-line links to advertise related resources.



A news page on the Allianz Australia intranet has a clear title, narrow columns, and the text is presented well for the web. Social features help employees engage with each other.

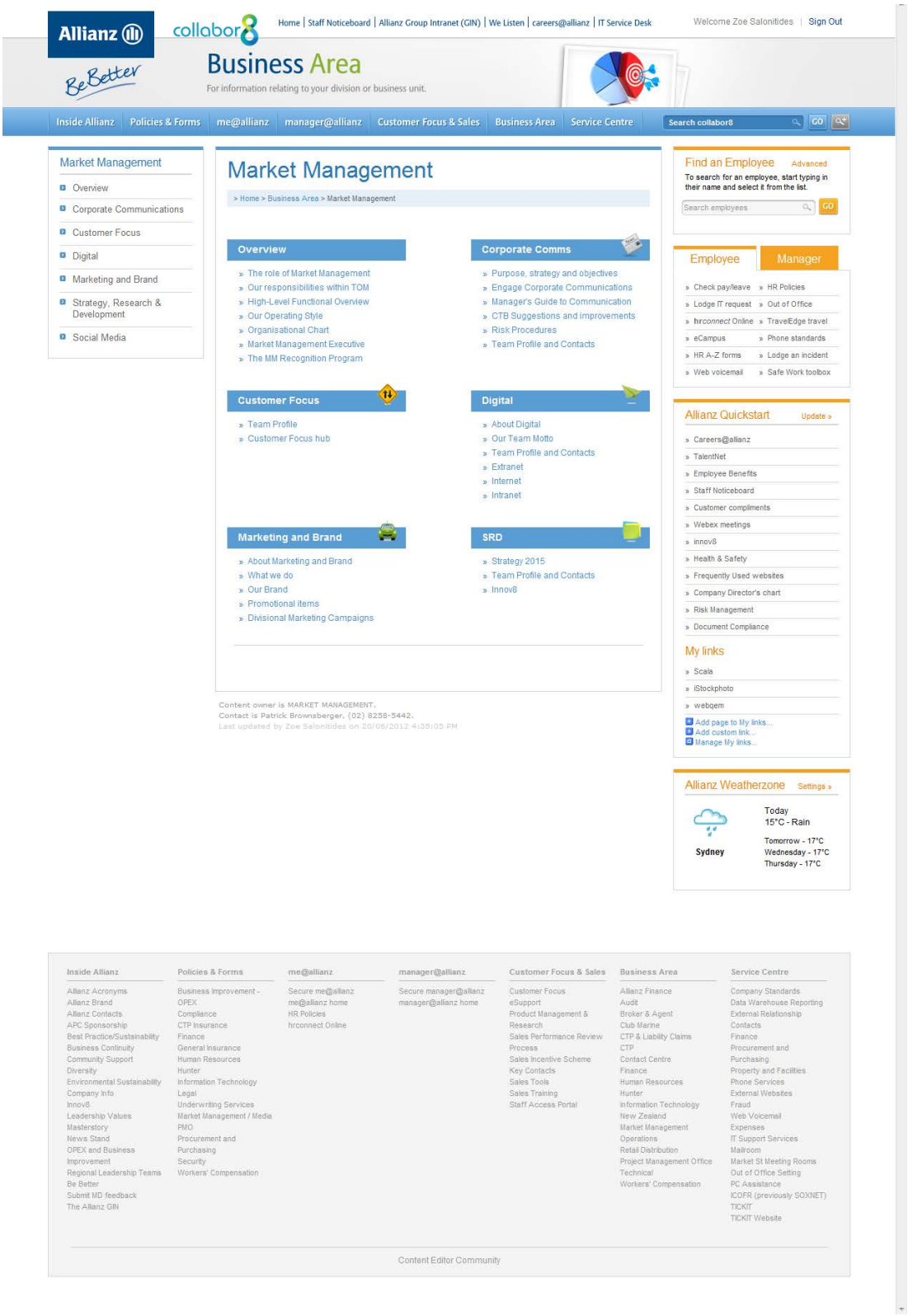
Helping employees find the right information is such an important part of collabor8. Many documents are stored and easy to find on the intranet. Once in a particular document area—which users select in the left-hand menu—they can scan the page for different categories. By default, a drop-down list shows *All Documents* and gives the option for other views.

On the documents page, topic headings are large and blue, and are easy to scan. Documents are accessible via links in the tables. These tables also include the document size, version, owner, and description.



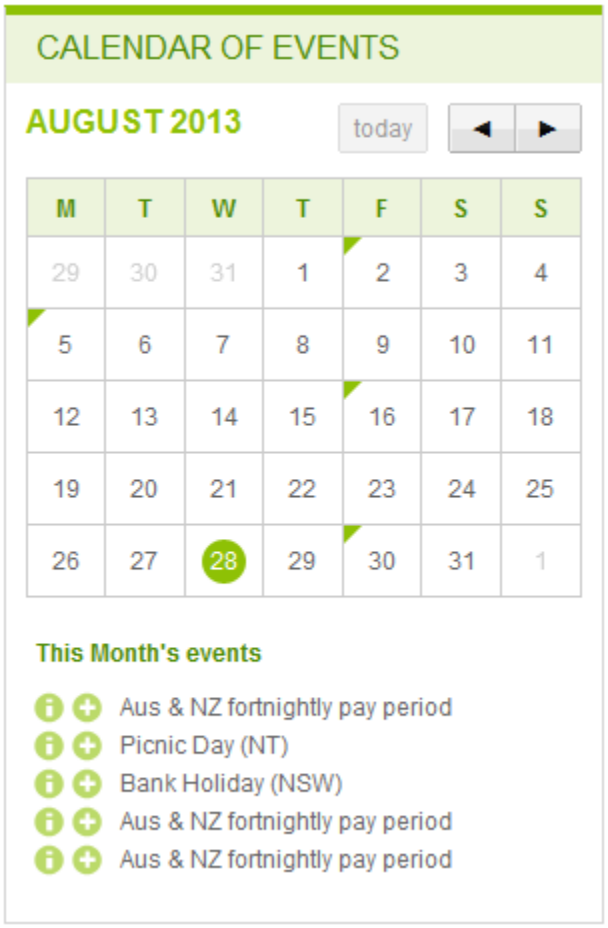
Documents are sorted by categories on the Allianz Australia intranet. This and other document information helps employees find the right resources.

Finding information about departments can be helpful, especially when, like Allianz Group, you are dealing with 170,000 employees in 70 countries. Knowing what various teams do can help collaboration, understanding, productivity, and motivation. All department main pages use the same template, with sectioned categories delineated by blue bars. Using a similar template and formatting helps employees move seamlessly from one department main page to another without having to relearn the layout.



Department pages on the Allianz Australia intranet show employees what different teams are responsible for, which helps increase collaboration.

The calendar of events displays dates and events relevant to many employees, including public holidays, pay days, town halls (meetings), engagement surveys, and advertising campaigns.



The calendar on the Allianz Australia intranet communicates events such as public holidays, pay days, town halls (meetings), engagement surveys, and advertising campaigns.

Getting around on collabor8 is easy, because designers included several very helpful navigation elements:

- Megamenus
- A fat footer
- Two rows of visible, persistent menus across the top
- Site search at the top
- A breadcrumb trail
- A right rail with persistent apps for the employee directory, links to often-used apps and content, and suggested links and bookmarks

An employee search function, which is the most important app on most intranets, holds a prime piece of real estate at the top of the persistent right rail. The search also offers *Advanced* employee search settings.

Just below this, in the right rail, employees can access links to key information. *Employee* and *Manager* tabs in this section separate the type of links based on these two different roles and responsibilities, making it faster for users to accomplish their particular tasks.

Suggested links and user-created links are easy to access in the right rail; users can easily change this list via several buttons: *Update, Add page to my links, Add custom link,* and *Manage my links.*

Both the mega menu and fat footer enable employees to scan several links at once without having to click through a link hierarchy. Headings in these sections are helpful signposts—not make-or-break commands as they can be at higher navigation levels (as in layered or cascading menus).

The megamenu's headings are bold and underlined. People don't always realize that items that are only bolded are links; here, they might think that the headings simply summarize the sections. Thus, it helps to also underline these headings, as the Allianz intranet designers did. Below the headings, the links are in bold only; underlining these sub-links is not necessary as users expect such items to be links in a megamenu. Employees can quickly scan these topics and then decide whether they need any of the links under the topic.

The selected menu item at the top of the hierarchy appears selected in two visible ways: a border appears around the top and sides of the selected tab, and the background is a lighter shade of blue than that of unselected menu items.



The megamenu on the Allianz Australia intranet makes it easy for employees to scan several links at a time, and thus easier to choose the right link.

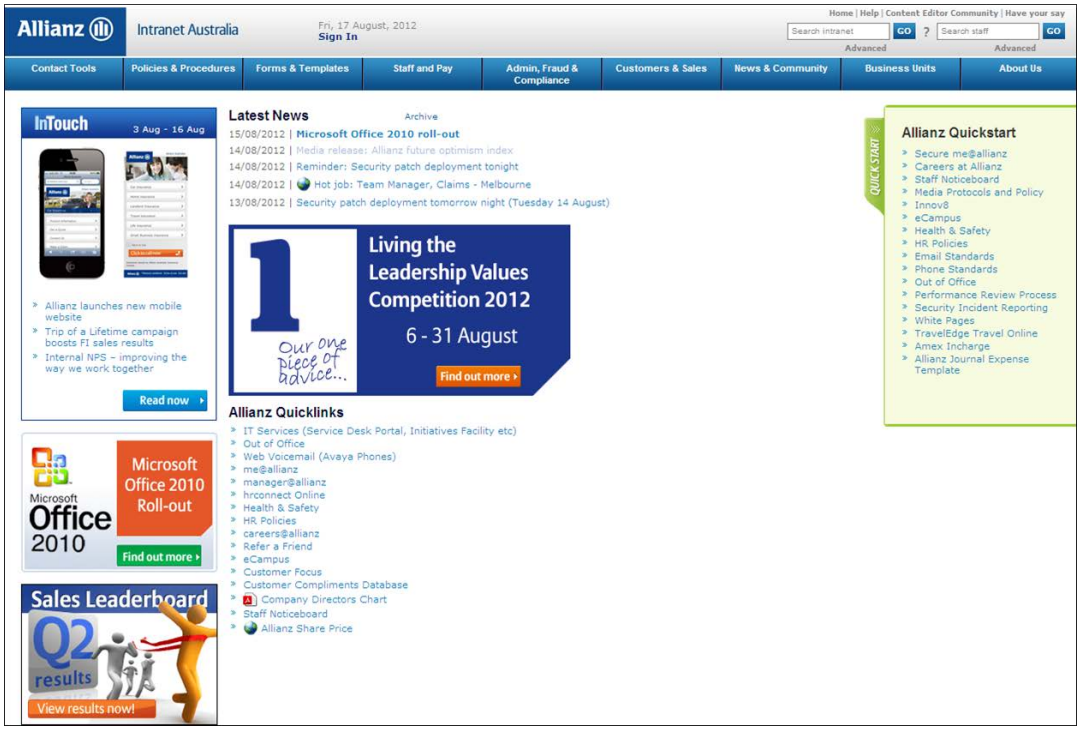
The Intranet Team promoted this redesign in a few ways, one of which was to hold a contest to name the new intranet. From more than 3,000 entries came *collabor8*; the winner received a new iPad. Another promotional activity included creating tutorials and a quick reference guide for the new design. These types of activities started the buzz among employees. A great design helped this buzz, and highly successful collaboration, to continue.

BACKGROUND

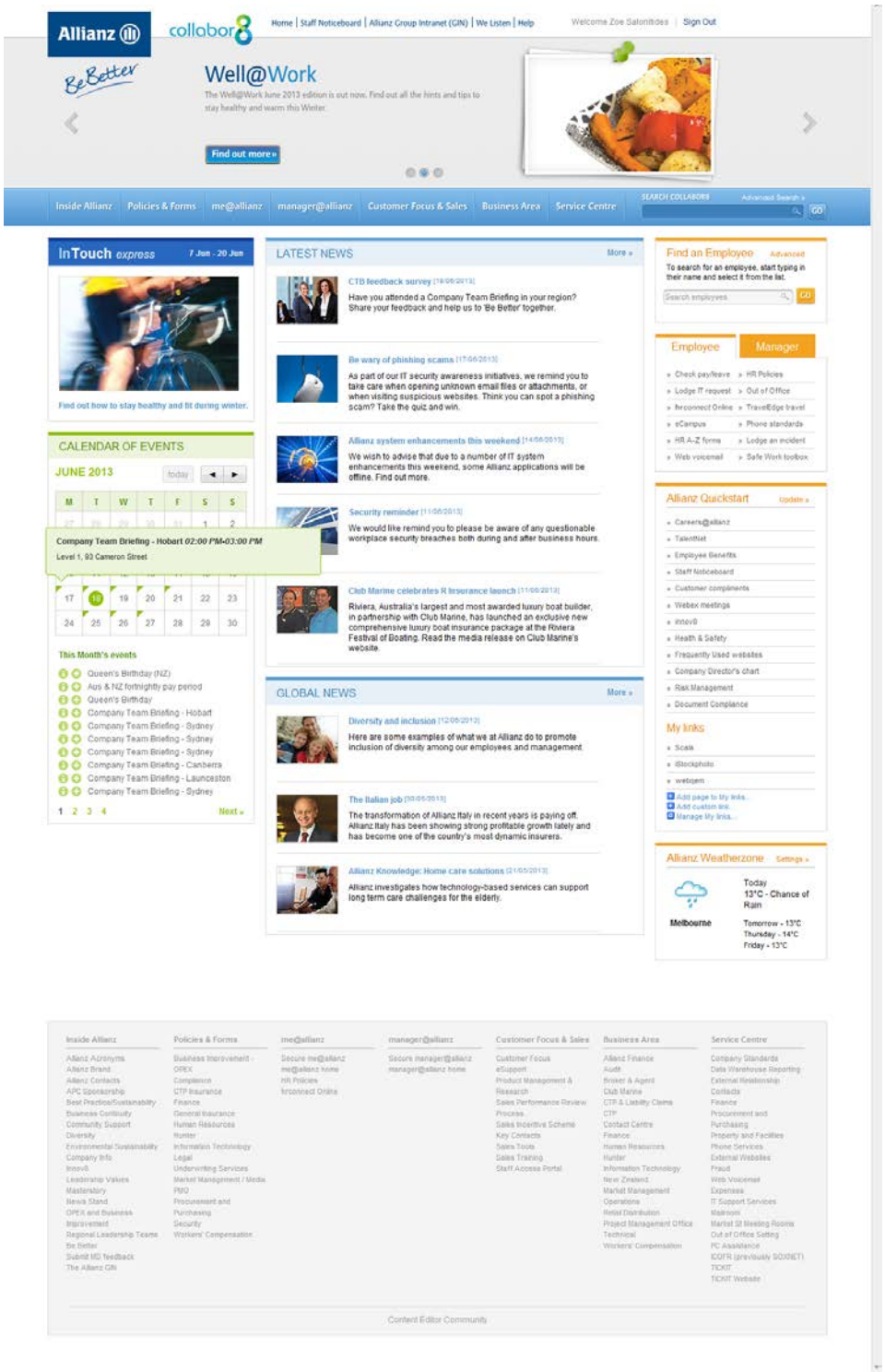
Many changes had taken place in the organization and on the design team since the last redesign in 2004, and it was time to take a fresh look at the company's intranet.

"The goal of the redesign was to enhance the intranet for all employees from a usability and best-practice perspective. The homepage represented an opportunity to ensure all levels of the company were accounted for and would include something of benefit for everyone," says Intranet Manager Zoe Salonitides. "This was the main driver behind additions such as the *Calendar of Events* and *Weatherzone* widgets, which enabled employees to instantly view what is occurring in a monthly snapshot and review each city's weather forecast for the next three days. We believed this level of information would assist employees whose positions are phone-based (such as claims staff and call center operators) as they interact with each other across the country."

The main challenges the team faced were in dealing with unexpected delays and the lag time between when the design was signed off on and when it was ready for development. Although the original launch date was set for May 2012, the team experienced technical glitches that pushed their timeline back three to four months.



Homepage, version 1. The old homepage had the latest news items in the top center, a main center banner, two side banners on the left-hand side, and two "quick links" sections.



Homepage, version 2. This design launched in September 2012 as "phase 1." The top banners (up to five) rotated every five seconds. The blue navigation bar reduced the sections/categories from nine to seven, with megamenus and the latest and global news taking center stage. Other new features included the *Calendar of Events*, *Weatherzone*, and *Employee/Manager* links.

INTRANET TEAM



The Intranet Team (left to right): Patrick Brownsberger, Ida Tamabadlbo, Zoe Salonitides, Mike Brown, and Greg Loundar.

GOVERNANCE

Ownership

The Intranet Team is part of the Market Management division and sits within the Digital Business team. Digital owns the intranet. “Digital’s ownership of the intranet means approvals, change requests, etc. can happen in an effective and efficient manner,” says Salonitides. “As the Digital team is not aligned to a specific business unit (such as HR or IT), we are able to collaborate and co-ordinate across the entire organization.”

“We are also responsible for setting the strategy and future direction of the intranet in line with our company strategy,” says Patrick Brownsberger, Group Manager Digital Business.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Core Team	• Govern the group-level intranet to ensure it complies with the company style guidelines • Monitor, support, and train content editors and owners to keep their areas well maintained and up to date • Provide consultation to business for online communications and knowledge management • Build and/or redesign team sites to meet business requirements and best practices usability
Content Editors/Owners	• Responsible for content management pages in their business area. • Conduct quarterly reviews to ensure information is kept up to date and is still relevant
Subject Matter Experts	• During the design phase, SMEs were required in each business area to confirm that the new design did not negatively impact their area • Test new functionality and prove feedback from the wider business on proposed design elements

USERS

All Allianz employees use the intranet for access to the latest local and global news, corporate directory, and HR policies/forms. Specific groups of workers also use the site for job-related reasons, including the following:

- **Claims managers:** access policies and procedures and quick links to contact information.
- **Call center operators:** fast access to key contacts and the latest campaign news and information. The call center department is the heaviest intranet user and drives high usage to these sections.
- **Management:** accesses finance documents, recruitment information, and the *Calendar of Events*.
- **IT:** accesses test information and security procedures; the intranet is also IT's primary channel for disseminating information to all employees regarding system maintenance and outages.
- **HR:** maintains HR policies and information regarding employee benefits and so on; HR also updates the corporate directory, which feeds into the intranet under *Find an Employee*.

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	• http://allianzintranet
Default Status	• The intranet is set as each user's homepage and their web browser is automatically launched when they log on to their computer. Users cannot change this setting, as it is an important channel for the organization to disseminate urgent information.
Remote Access	• The intranet can be accessed remotely through a Citrix connection, where the user's desktop (including drives/folders) are replicated. It can also be accessed via a smartphone application, Good, which is available through the company's BYOD program.

DESIGN PROCESS AND USABILITY WORK

The Intranet Team conducted research to identify how employees viewed and used the intranet as well as to understand how to structure content to ensure users can get to the information they need quickly. This research included the following:

- **Needs analysis:** During this analysis, the team reviewed the current state of the intranet, which helped it create a roadmap for improvements.
- **Stakeholder interviews and workplace observation**: The team interviewed a cross-section of employees across all divisions, including both employees and managers. New starters were also taken into account.
- **Card-sorting exercises:** The sessions involved a mix of managers and employees, with the main focus on HR content. Each group was given a number of card-sorting exercises that required them to divide information and re-categorize them into groups.
- **Tree testing:** The team conducted a quantitative study of the new site map to ensure that the majority of Allianz employees could easily locate information when required. This was an important exercise, as the navigation categories had been updated and new ones had been introduced. An external survey (by Optimal Workshop) was also used; in it, 20 scenarios were presented to respondents asking them to search for information within the seven navigation sections using a tree map.

These exercises proved fruitful for uncovering unmet needs and improving user interactions. "Using the results from the card-sorting, interviews, and tree-testing exercises, we were able to develop and improve the information architecture ensuring the new navigation was intuitive and that the categories made sense to employees," says Salonitides. "One of the key changes with the recent intranet redesign project was the introduction of megamenus in the navigation. To ensure

that employees understood how to navigate within the megamenu and what information was available to them in these menus, it was important to conduct various user acceptance testing sessions."

The sessions again included various employees from a cross section of divisions, testing the major functionalities within each navigational section, including the homepage. The Intranet Team collated the results and further enhanced the navigation and information in the megamenus.

Since the initial redesign launch in 2012, the Intranet Team has made further navigation enhancements based on employee feedback.

Sometimes, research uncovers information that improves work life through the intranet, and sometimes it can help unearth findings that help make users happy.

One of the most surprising results of the user research was finding out how much employees liked certain widgets on the homepage. "When we asked employees to test the homepage prior to launch, we were surprised with the popularity of the *Calendar of Events* and *Weatherzone* widgets," she says. "Employees found these new features engaging as well as entertaining."

The rotating *Weatherzone* widget allows users to view the weather and forecast for every city in Australia, as well as for Auckland, New Zealand, and to set their preferred city as a default.

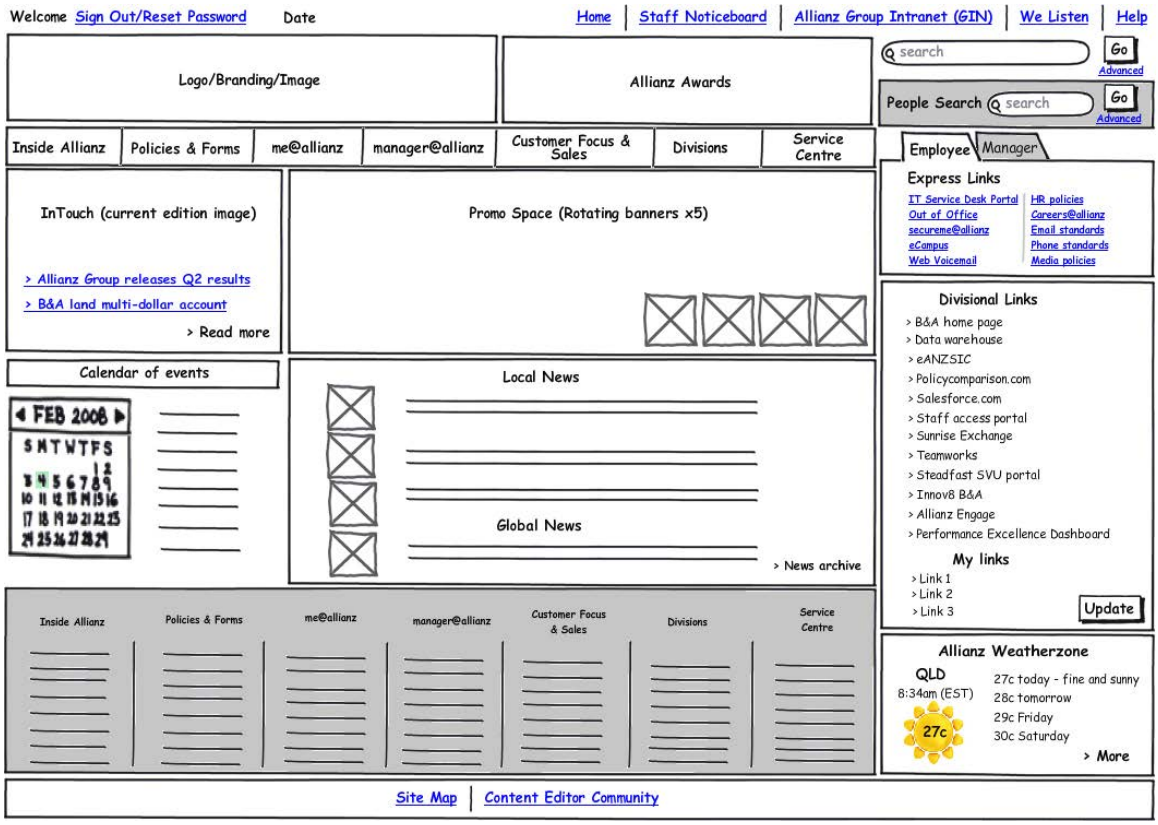


The *Weatherzone* widget has become a huge hit with users as they can now access their local city's weather instantly instead of having to use their smartphones. A three-day forecast is available; cities rotate unless users set the widget to display only a particular city.

The Intranet Team did one thing that can be crucial to intranet success: It kept interacting with users, even after the site had launched. These pulse checks contribute to an ongoing punch list of things to pay attention to after the new site goes live.

"On the day of the intranet redesign launch, we promoted the new intranet with a banner, a news item, as well as a company-wide survey asking for user feedback," says Salonitides. "We also enabled feedback via a comments forum where employees were encouraged to give feedback as well as ask any questions they had regarding the new design. Most of the feedback was positive and assisted us to identify areas

that still required attention. We used the feedback to make further enhancements to the intranet."



The final wireframe that was given to the digital agency First to use in creating the homepage design and coding. The main change from wireframe to go-live was the placement of the promo banners. The wireframe has the banners underneath the navigation bar, whereas First placed them above the bar, which the design team saw as an improvement.

TIMELINE

The overall redesign project took two-and-a-half years to complete.

INTRANET TIMELINE	
Milestone Date	**Milestone Description**
2001	• The first company intranet launched
2005	• Intranet redesign
January 2010	• Initial redesign planning began with card sorting to help determine the navigation menu for HR
July 2011	• Full redesign project began with arrival of new intranet manager and specialist
September 2012	• Launch of new design
April 2013	• Redesign with slimmer navigation and banners and updated templates for content pages

CONTENT AND CONTENT CONTRIBUTORS

The content management system is a pre-existing CMS that is also used for the company's external website. It runs off a Lotus Notes database.

The intranet has approximately 500 content owners. Each division's content owners/editors are responsible for the development and maintenance of the majority of the content. The Intranet Team develops the design for this content. Content owners are responsible for reviewing the CMS pages that are assigned to them. The database sends an automatic email to owners every three months to get them to review their content and to update it if necessary. If they have not acted upon this this request, follow-up emails are sent on a weekly basis to remind them to do so.

The Intranet Specialist has the responsibility of training people in how to use the intranet CMS. Training is often carried out every two to four weeks and gives content owners and editors the knowledge they need to build and edit their own pages. Templates are provided to help authors create specific types of content, and authors receive constant feedback through the page approval process, particularly if content does not meet the intranet user/style guidelines. Ad hoc feedback is also provided to owners on a daily basis. Finally, content owners receive intranet style guidelines—including a user's manual—and online writing tips to help them create content.

All page approvals are directed to the Intranet Team, which continuously checks pages to ensure they adhere to Allianz's standards. Pages are rejected and sent back to content editors if they do not meet the approval checklist.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Design Tools	• Balsamiq
Site Building Tools	• Lotus Notes
Content Management Tools	• Lotus Notes CMS/Domino
Search	• Google Search Appliance

SEARCH

The intranet first used Google Mini as its search engine, because it was deemed superior technology and users were familiar with it. Google Minis have now been superseded by the Google Search Appliances, which are even more refined than the minis. "We are in the process of implementing Document Previews, dynamic categorization searches, and query suggestions," says Salonitides. Meta-tags and best bets were implemented to help refine the search; both help streamline results when searches are conducted for popular categories, initiatives, policies, and so on.

RESULTS AND ROI

Measures of success, while hard to quantify, include the wave of positive feedback the team has received since the launch, and of course the increases in usage.

"Employees still go out of their way to let us know that they prefer the new site as it feels more like a 'website'," says Salonitides. "Our corporate communications team members are using the features of the new intranet more, particularly with their latest and global news elements. Also, the global recognition received from the head office in Munich has cemented collabor8 as the best-designed intranet in the Allianz Group."

Readership for the *Latest News* feature has greatly increased since launch. Salonitides says she thinks this surprising result is due to specific design changes: "By placing news in the center of the page, with thumbnails depicting the type of story, news has even surpassed the popular fortnightly *InTouch* online newsletter," she says.

LESSONS LEARNED

Ida Tamabadlbo, Intranet Specialist, explains that the team's lessons learned from the redesign project are primarily related to how users received specific features:

- **Rotating banners:** "One of the features we rolled out with the new intranet was the rotating banners, which displayed on top of the homepage. While most of the initial feedback was positive, some of it suggested it was 'too distracting on the eye' or that it 'took up too much real estate on their screens.' We took the feedback on board and continued our research, which confirmed that the use of rotating banners was not best practice and that user-led banners were more appropriate for intranets."

- **Slimming down the banners:** "One of our recent enhancements to the homepage included slimming down the banner space as well as reducing the number of banners from five to three. We also removed the rotating feature and instead provide thumbnails with captions for each of the banners. When a user hovers over any one of them, they have the choice to click to find out more."

Tamabadlbo also describes a few lessons learned in relation to "working in a particularly small team along with a tight deadline":

- **Don't underestimate the time needed for development.** "Working with only one full-time IT developer, we underestimated the time required to implement the coding into our systems."
- **Take the time you need for requirements gathering.** "We spent some time going back and forth with IT; we've learned that it's important to spend the additional time to outline our requirements better, which would have saved us more time in the long run."
- **Better to launch late than launch before you are done.** "So many elements can come undone, for example, more development time required. We found that you can't always be wedded to the launch date, and if there were solid reasons to delay launch, we did so with our users in the forefront of our minds."

AMP

Using the intranet: AMP is the leading independent wealth-management company in Australia and New Zealand, serving more than five million retail customers and 400 institutional clients across Asia, Europe, the Middle East, and North America.

Headquarters: Sydney, Australia

Number of employees the intranet supports: 6,000

Company locations: Primarily Australia and New Zealand

Annual sales: Underlying profit of $955 million in 2012

Design team: Octavia Maddox, Lead Designer; David Wall, User Experience Designer

Core intranet team: Emily Staresina, Collaboration & Community Manager; Linda Le, Collaboration Coordinator; Frank Arraizia, Online Community Associate

SUMMARY

When wealth-management company AMP merged with AXA's Australia/NZ business, the company increased in size by two-thirds overnight. The existing intranet simply couldn't support the information needs for a company of 6,000 employees, and collaboration tools worked for only one group or the other, but not both. This meant that the only tool available for employees to use across the organization was email. In addition to addressing these challenges, an intranet that was new to both parts of the company was needed to signify a fresh start and bring people together.

This gave the intranet team its goal: To create a platform, called *the Hub*, for collaboration that could retain and generate knowledge, while also being inexpensive to maintain and easy to use. At the same time, the company was moving toward a more mobile and flexible workforce, making it important that the new site support employees in any location on various devices and also facilitate collaboration.

The team incorporated employees throughout the process. The reason was two-fold: it helped the team understand more about users and their needs, and it engaged employees and helped them be a part of the process. Team members ran co-design cafes, which were advertised on the intranet and open to anyone, to engage employees and gain insights. They ran usability tests. They created a blog about the design process. They hosted webinar walkthroughs of evolving designs. With so much employee involvement, team members could actively work on change management throughout the process rather than at the end.

Previous iterations of the site used separate tools for social networking, intranet content, collaboration spaces, and enterprise search. The new site combines these elements into one, giving employees a single place to go to do their work. The site is built responsively, so users can access content on any device.

The intranet's team members had little previous experience designing responsively, so they learned as the site was developed. This meant that the development approach had to change. They adopted an Agile approach in part because it was hard to gauge how long particular aspects of the project would take; they were in unchartered territory. Team members managed the process through sprints, focused on essential features and working toward their ultimate goals. This development

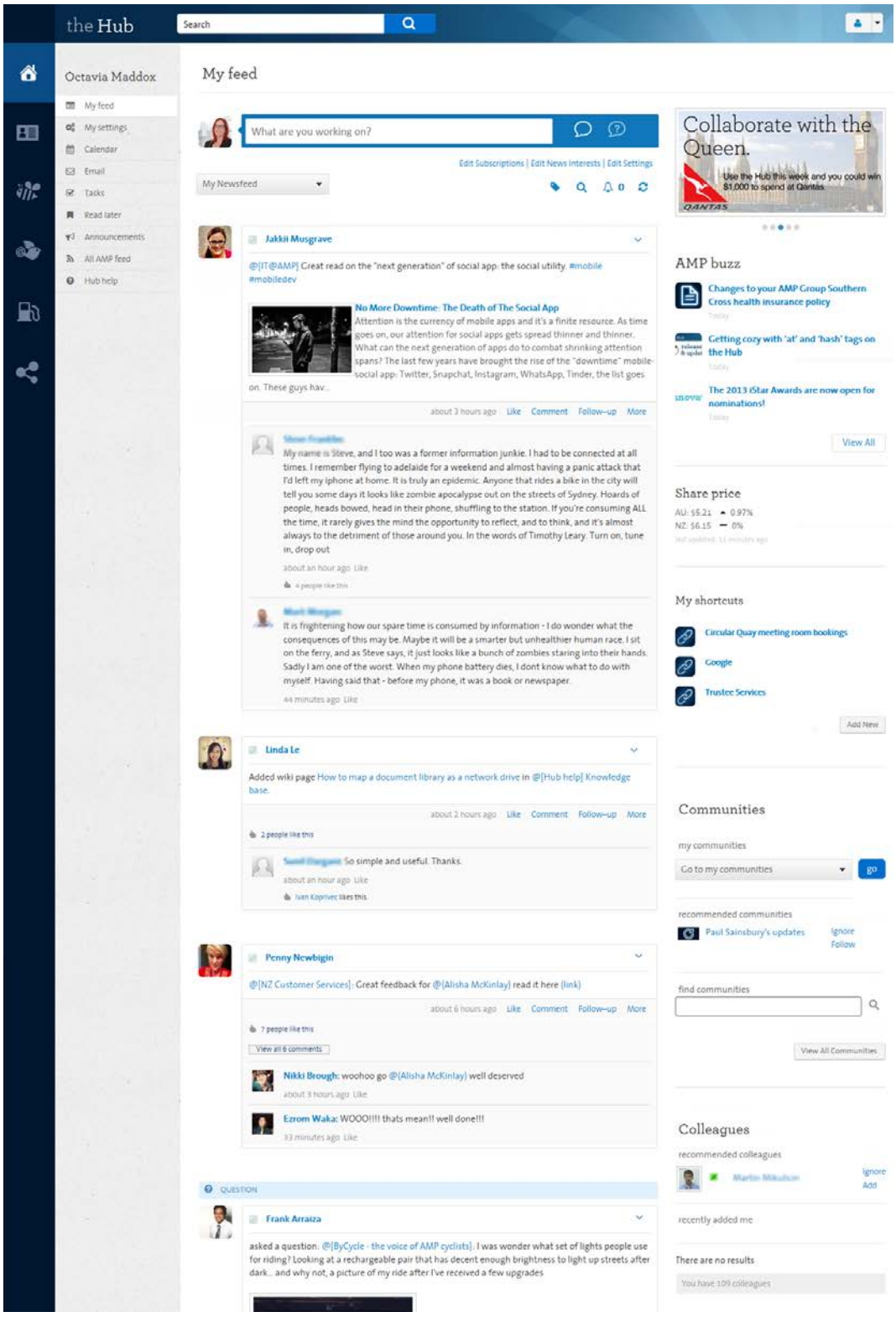
process is ongoing, post launch, as they make continual improvements and additions to the site.

Initial research showed that users were frustrated with irrelevant content, so the team changed the site to present information based on role, location, and employee type.

Some employees also found it hard to think of the social network tool—which was previously separate from the main intranet—as work-related. The team thus decided to make the activity feed central to the site experience and show users that it was another way to communicate and collaborate, rather than being solely a "social" tool. The feed is made more relevant to users via personalization. Users can follow communities or individuals, and corporate can also broadcast information to all users. The display of corporate information in the feed communicates to the organization, of course, but it also shows organizational support for the tool.

Social content and collaboration is fully integrated into the site. Employees don't have to navigate anywhere to see the site's social elements. Social is front and center on each user's homepage via their activity feed. Posts are accompanied by the poster's image and comments are shown. In addition to posting from the homepage, employees can like, comment on, flag (for follow up) any of the updates. Posts are listed in chronological order, with the newest appearing fist.

Top news headlines appear on the right under *AMP buzz*. The stock price is also listed, and users can create their own shortcut links to internal or external content. Scrolling down the page, the user sees recommendations for communities and colleagues to follow.

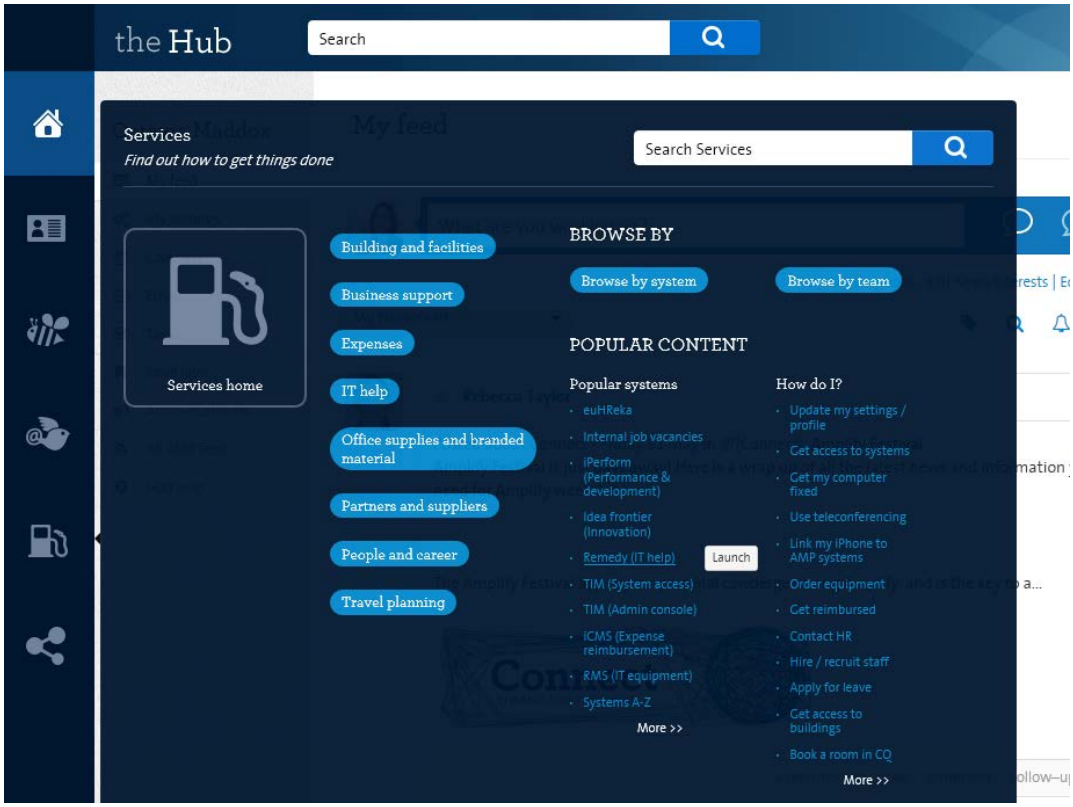


The homepage's main content is the activity stream, with updates and posts from people employees are following or groups to which they belong.

Site navigation appears on the left. Navigation is icon-based, with links to *Home*, *People*, *Buzz* (news information), *Working at AMP*, *Services* (tools for daily work), and *Sites* (collaborative sites).

Megamenus show users the content for each category. The display of these menus was refined based on user research. Initially, the menus showed only commonly accessed content, but user testing revealed that users then assumed this was all the content that was available. As the screenshot below shows, the team then changed the design to include top-level subcategories in the menus (such as *Building and Facilities*) and additional quick links for commonly used pages (under *Popular Content*). Megamenus provide scoped searches specific to that section of the site. The search box appears within the menu, with the scope indicated in the box itself (here, *Search Services*) to differentiate it from the overall site search, available at the top of each page of the site.

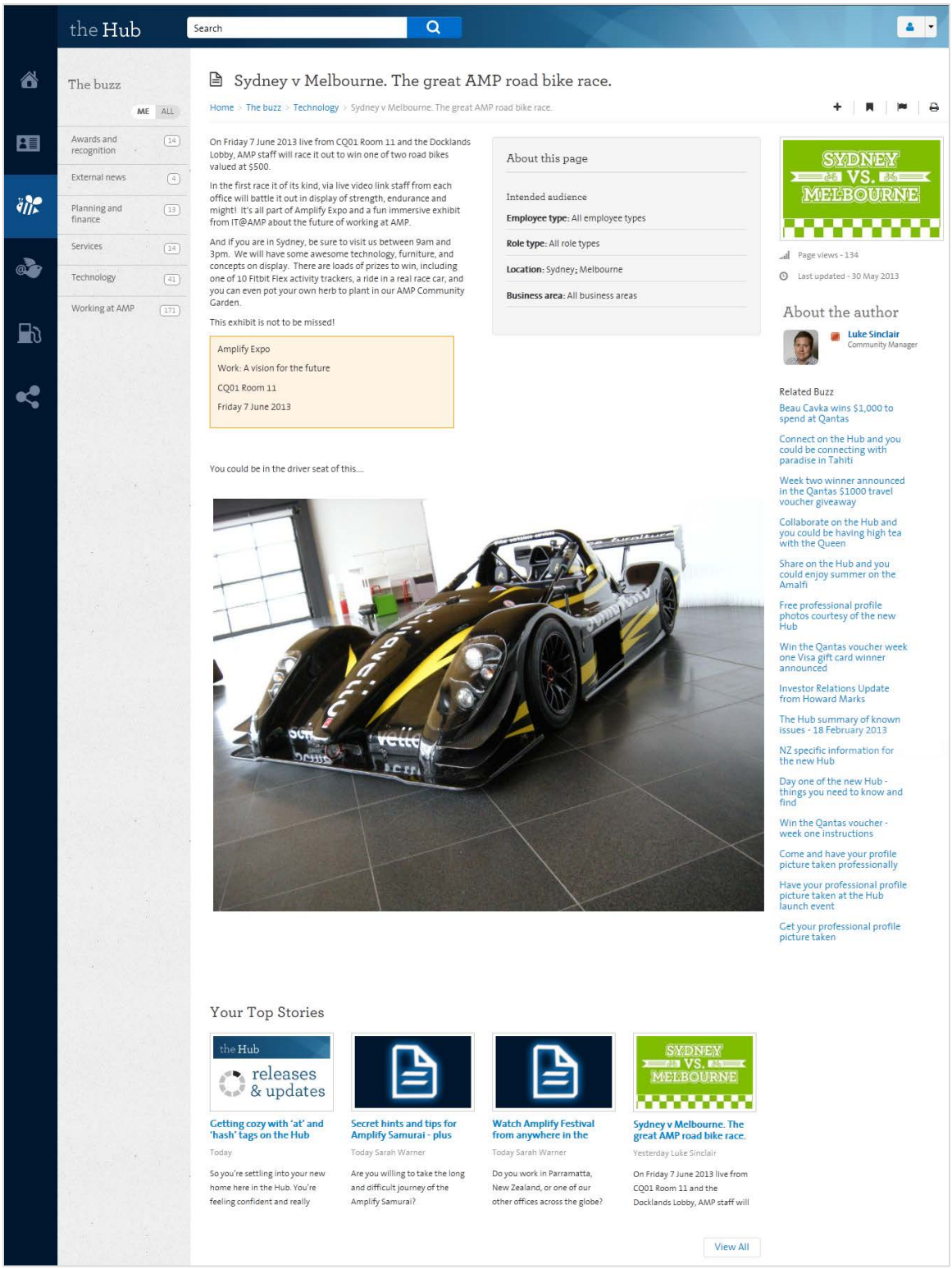
To drive site usage and provide useful information, the team added links to give users quick access to the tools they need to do their daily work, including systems, teams, how-to guides, and known system issues. The menu for *Systems* includes a quick link directly to a tool from the megamenu so users don't have to move through a landing page for the tool first. If a user hovers over a system name, a *Launch* link appears leading directly to the tool. (Landing pages are available, however, for users who aren't sure about which tool to use or who need help using the tool.)



Megamenus show users top-level categories and also provide direct links to popular content. Users can quickly access tools by hovering over the target tool's name, which causes a *Launch* link to appear, allowing them to bypass the tool landing page.

The news section, *The Buzz*, provides targeted news to the individual based on business area, location, role type, or employee type. *Top stories* lists the latest news across all categories, and users can scroll to see stories by category. Users can view all information—rather than just those stories targeted to them—by clicking *All* (rather than *Me*) in the left-hand navigation.

About This Page appears on article pages, showing users the audience, roles, locations, and business areas the news targets. This at-a-glance information is intended to show users why an article is relevant to them. The side of the page includes information about the author, as well as a list of links to other articles by the same author. *Your Top Stories* are listed at the bottom of the page to encourage users to explore additional targeted content.



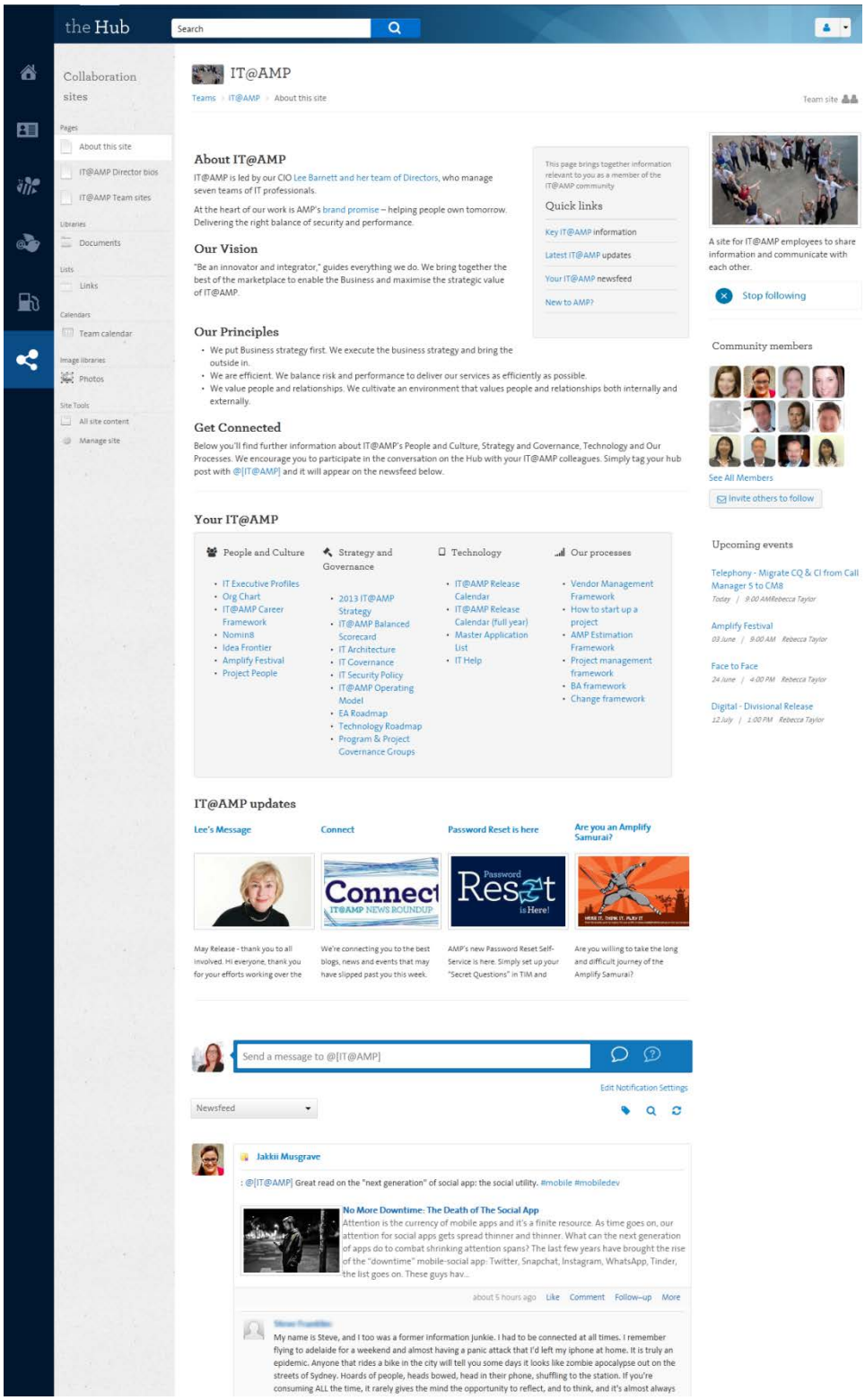
News, or *Buzz*, is targeted to users, but they can elect to see all news stories via the *Me*/*All* toggle in the left-hand navigation.

Collaborative sites are integrated into the site through the *Sites* option in the main navigation. Employees can create collaboration spaces for teams, projects, communities of practice, and communities of interest. A simple request process helps users create new spaces. The process is in place to prevent redundant groups as well as to help define the goal of the area and discuss ideas to drive adoption. Monthly audits ensure that employees are active and engaged with the content. Areas with waning participation receive guidance from the team on ideas for engagement, and unused sites are deleted if no longer needed.

A dedicated community-management team works to ensure the adoption and growth of social communications at AMP. Early efforts at engaging employees have paid off; user adoption bypassed that of the previous networking tool in only six months.

Each user's homepage includes recommended sites — based on position, role, location, or people the user is already following — to make it easier for employees to find useful groups to follow. A consistent navigation and homepage layout is enforced throughout collaboration sites so users can move easily through different collaboration areas without having to learn a new structure each time.

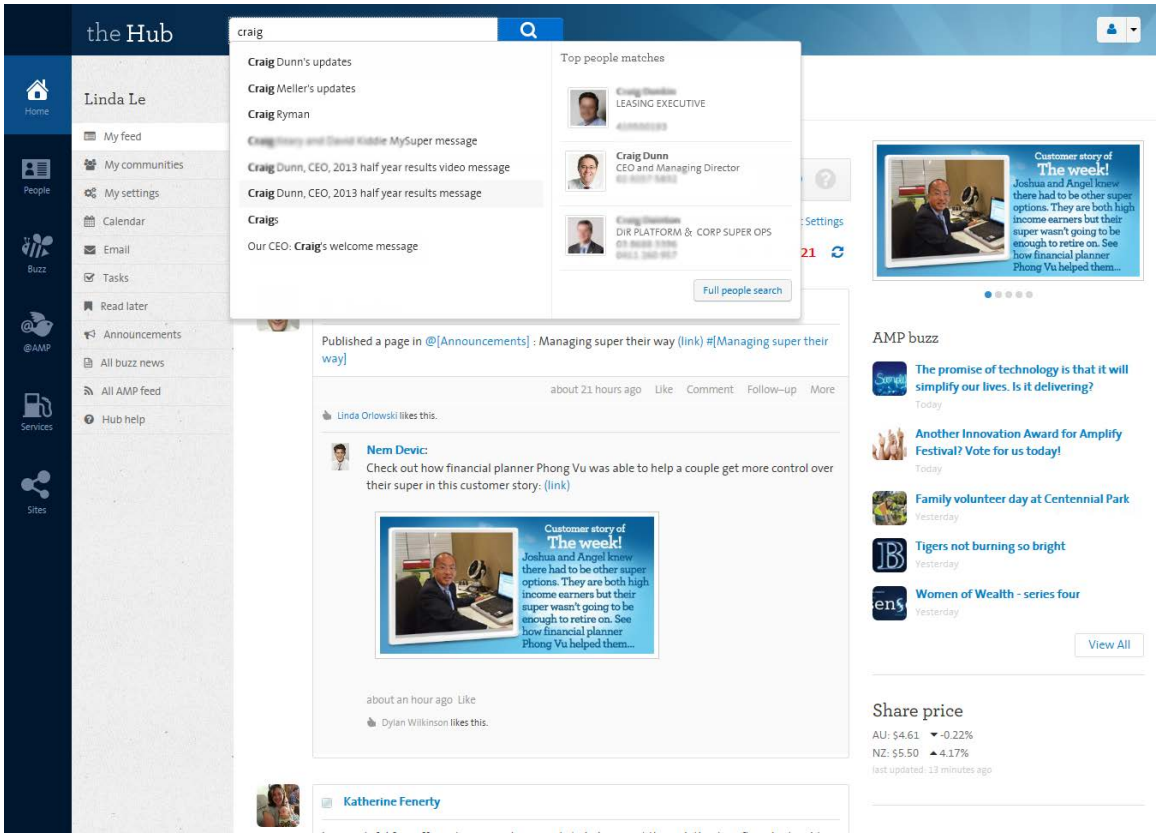
Sites include information about the group and a list of members. Updates are listed, along with the feed specific to that group. Users can add a group to their feed by opting to follow the group on the right-hand side of the page; any new posts to that group will then appear in the user's activity feed.



Collaboration sites can be created based on teams, projects, communities of practice, and communities of interest.

Search was a major enhancement on the site. With a better search tool, the team found that content was surfacing that was out of date or not helpful. A content audit helped reduce outdated information.

Type-ahead functionality helps users quickly move to the results they need. As a user types, results from various site sections are displayed. If a name is searched for, top people matches, together with a phone number, name, image, and title, appear, along with a link to the full People search.



Type-ahead functionality helps users move to results more quickly.

The site is designed responsively. A full mobile strategy is in progress; the general approach is to focus on viewing and navigating content on mobile versus creating and editing content on the desktop. The company also has an iOS app for social content, available through the app store.



The smartphone design uses anchor links to move users down scrolling pages and moves related links and author information to the bottom of the page. Site navigation floats at the top of the mobile screen.

The team thought through the details to make a successful site. From incorporating user feedback to thinking of ways to encourage adoption and engagement, they

worked to create a site that focuses on new and relevant information and easy and active participation.

BACKGROUND

The merger between AMP and AXA three years ago effectively increased the company's size by two-thirds, practically overnight. Along with this transition came a host of information challenges. "People could no longer find the right people, systems, or information they needed," says design lead Octavia Maddox. "There was also a critical business issue where original AXA staff could not access AMP staff collaboration material and vice versa."

There was, in fact, no way for people to collaborate other than via email.

Staff was spread across multiple locations, leaving them unable to physically collaborate and in desperate need of an online location to share knowledge and work together. The intranet was intended to fill this void.

"The business case for the new intranet was to create a platform for collaboration which enabled knowledge retention and generation," says Maddox, adding that it also had to be "relatively cheap to maintain and easy to use."

Trends in workforce mobility also influenced the new intranet's direction. With an increasingly mobile workforce, the intranet had to provide more web self-service and automation to support workers on the move. Strategically, the new Hub would support new ways of working.

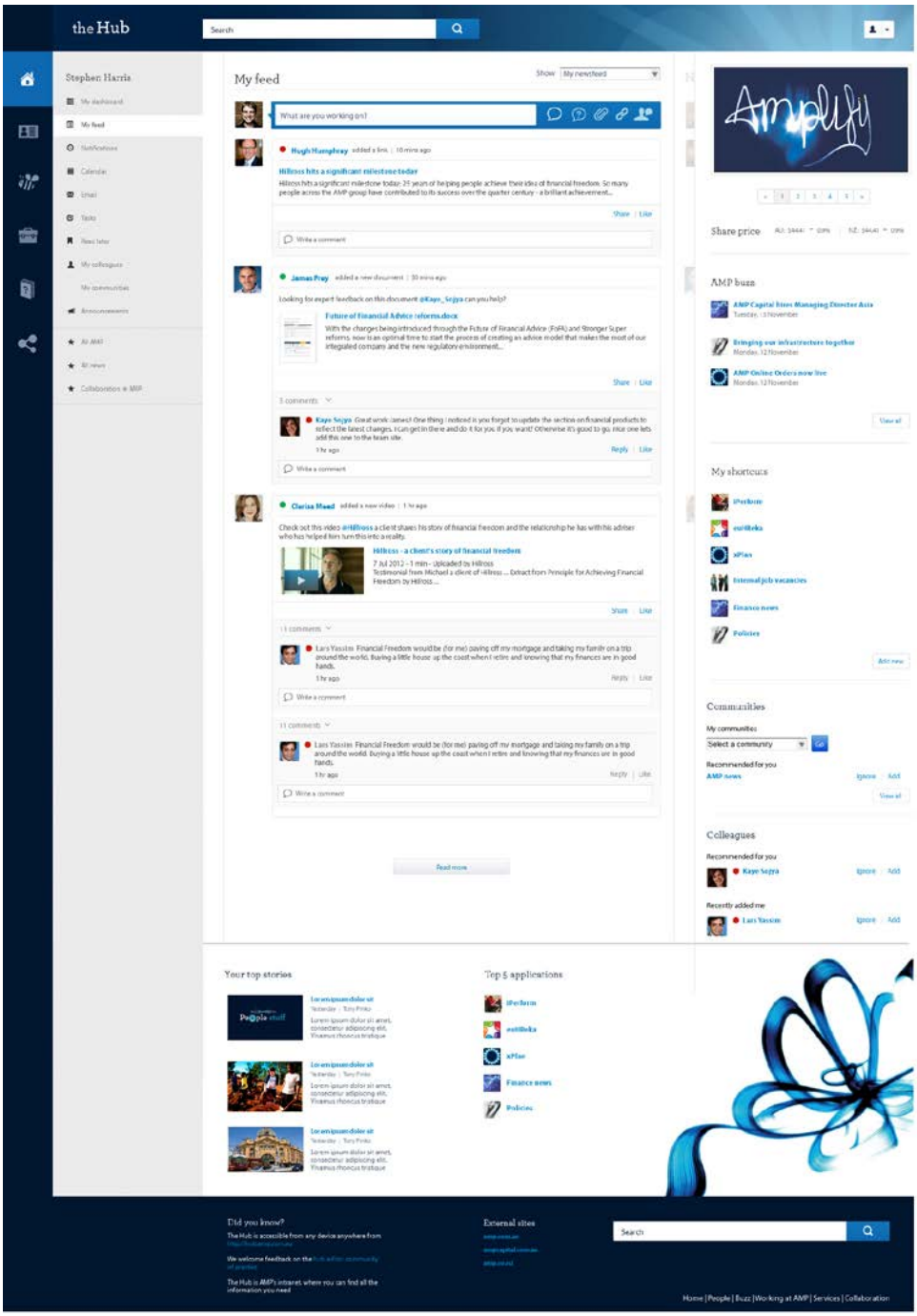
The vision for the new intranet was to build "the" single place for AMP employees to do their work. This would be achieved by merging AMP's social network, traditional published intranet content, collaboration content, and enterprise search into a single unified platform. The new Hub can be accessed anywhere, on any device, using responsive design techniques and a simple factor authentication.

Challenges

With lofty goals come challenges. The AMP team faced many trials along the way, including the following:

- **Unifying a diverse company.** AMP is a diverse and complex company—one part of the business manages shopping centers, while another runs an insurance company. It was a challenge to create business value for all employees on a single platform. To address this, the AMP team worked with pockets of the business in which people were interested in the intranet as a solution, and fanned out to the larger organization from there.
- **Legacy technology.** Tuning the server environment to deliver adequate performance and integration with legacy Active Directory environments was difficult.
- **Browser constraints.** One of the team's unique challenges was that 80% of the company's users were using IE7 as of January 2013 (one month before launch), but by December, 80% were supposed to be using IE9. The Hub didn't run well on IE7, so the team used a workaround: they used a Chrome engine to load pages in IE7.

- **Performance.** The performance challenge was managing the performance of the site itself—that is, managing responsive web design and the complexity of the pages. Ultimately, the team had to make a trade-off: the richer the experience, the slower the delivery.
- **Delivery.** It was challenging to deliver a unified site to a workforce that was highly distributed geographically.
- **Resourcing.** The team had difficulty sourcing quality developers who had the appropriate experience in responsive design and social software.



This is one of the (many) iterations of the homepage design. The original icons evolved through a number of versions as they were tested and redesigned. The team reduced the clutter in the footer based on feedback from usability testing. The actions available on the social feed were reduced when testing revealed that users were confused about the nature of each function.

INTRANET TEAM



The AMP intranet team (front row, left to right): Jenny Thai, Octavia Maddox, Steve Dawson, Linda Le, and Henry Wijaya; (back row, left to right): Doug Wolfson, Darren Walker, David Wall, Frank Arraiza, Wendy Chan, and Pramit Punnilethu.

GOVERNANCE

Ownership

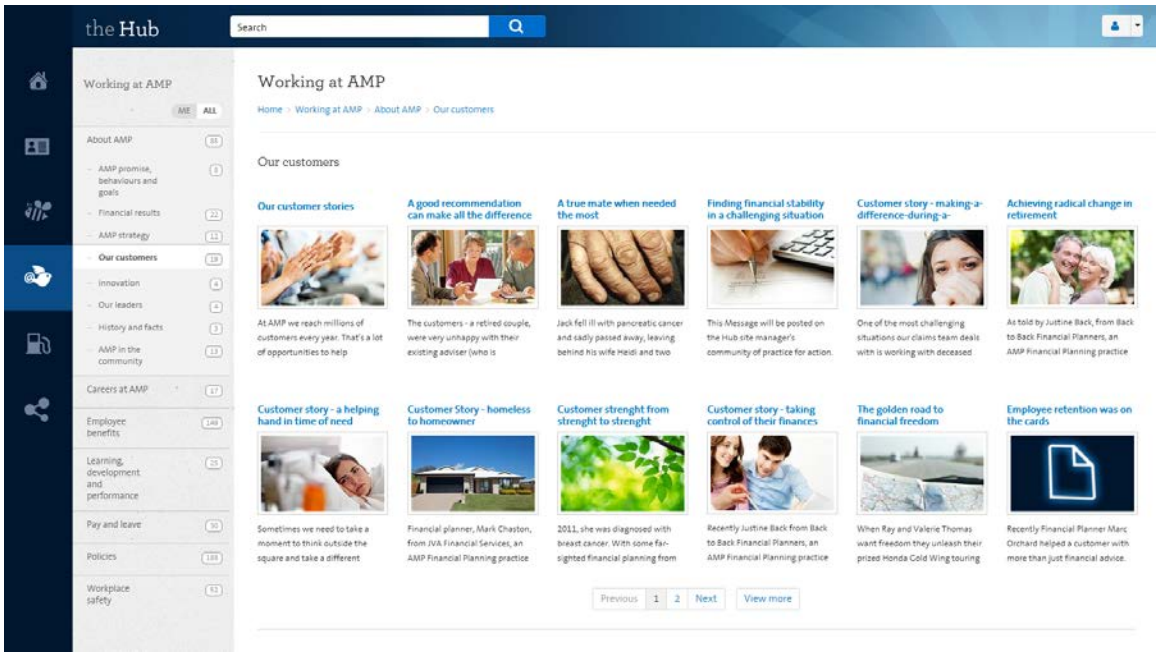
The Hub's business sponsor is the CIO and the platform strategy and support sits with IT@AMP's Collaboration and Community team, which reports to Peter Histon, the Head of Collaboration and Integration. This team is responsible not only for ongoing business support and services, but also for thought leadership in the delivery of technology to meet business strategies.

"As with many good intranets," says Emily Staresina, Collaboration and Community Manager, "IT works in collaboration with the Internal Communications team from a platform communications perspective. Additionally, much of the strategy around enhancements is informed by end user [employee] feedback."

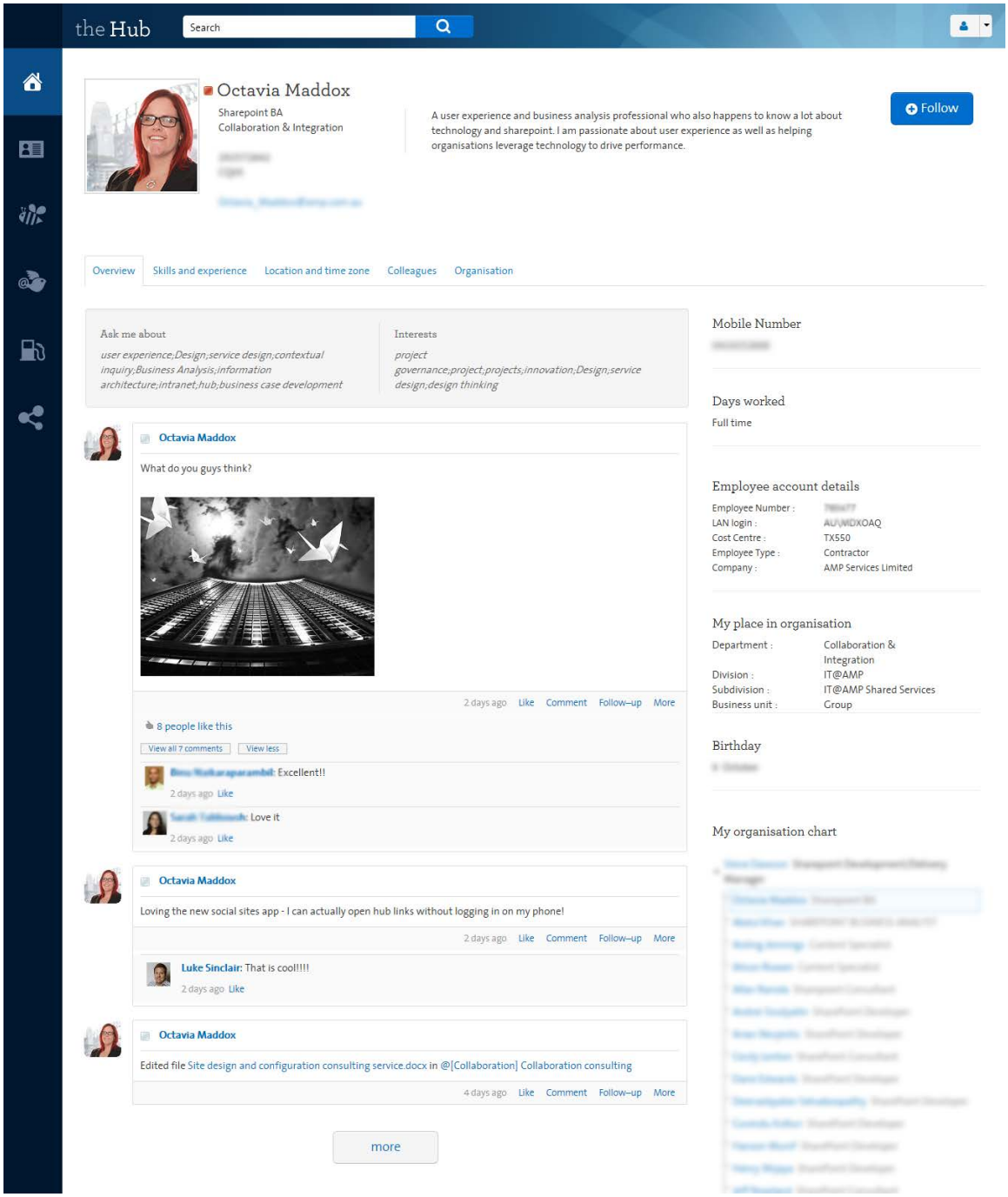
INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Collaboration and Community-Management Team (the business-facing part of the intranet team)	• Define and manage intranet strategy, including the roadmap • Drive engagement; deliver education, support, and governance for collaboration sites and content publishers; grow adoption of the social activity
Collaboration Apps Support Team	• Handle technical maintenance, bug fixes, and enhancement deployments
Public Affairs (Internal Communications)	• Generate corporate ("official") news and targeted content • Work with Collaboration and Community team to set strategic outlook for communications on the Hub
Content Owners	• Update and ensure consistency within their own sections
End Users	• Generate targeted news and communicate via social feed

USERS

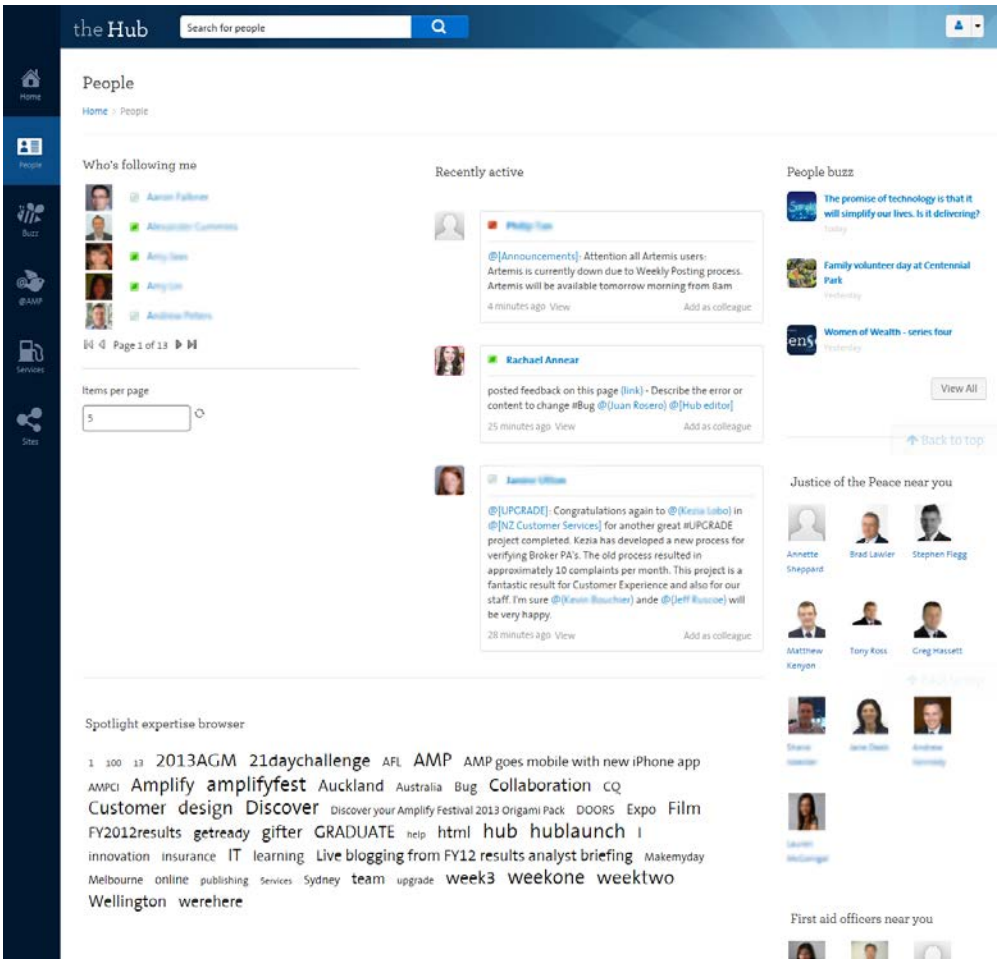
All AMP employees use the intranet. Because anyone who can log on to the network can access the intranet, the user population is diverse in terms of age, time at the organization, English proficiency, confidence using computers, locations, role types, and usage types (ranging from once per week to hourly).



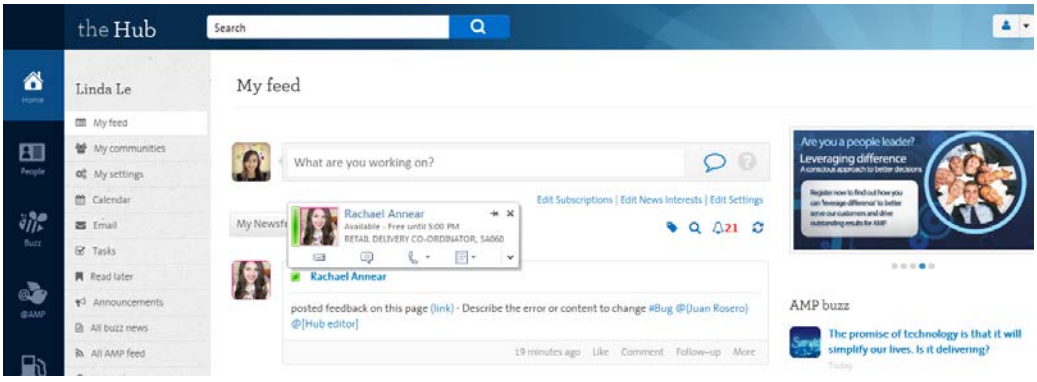
Research throughout the business found low engagement from staff members outside the head office, who were reportedly overwhelmed with irrelevant content. To drive engagement for all employees—not just those in the head office—the navigation visually represents all the content targeted to the user in an engaging way. The idea of using visual navigation was a key finding from the team's co-design cafes held with staff.



AMP's new, content-rich profile offers employees a space to share their skills, experience, and interests with the rest of AMP. The content-rich nature of the profile means that AMP staff can now locate each other using a range of search terms and parameters. Data from the profile also syncs with content on the intranet; this powers the content targeting across the platform and is linked closely to the search and expertise finder.



The *People* webpart section draws its information based on a user's profile settings and assigned roles. It allows users to be grouped if they've been tagged as a certain role, such as a Justice of the Peace or a Fire Warden. This allows quick and easy access to a specific contact group.



Lync presence lets employees view real-time user availability according to their Microsoft Lync status based on their Outlook calendar status. Grey = *Offline*, green = *Available*, yellow = *Away,* and red = *Busy/Meeting*.

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	• http://hub.amp.com.au/
Default Status	• The Hub is set as each employee's default homepage.
Remote Access	• Employees can access the Hub remotely via the above URL and are prompted to enter their LAN ID. Employees can also access the Hub via VPN.
Shared Workstations	• Subsidiary companies share terminals for certain functions on the Hub; a primary terminal has their own company's SOE.

DESIGN PROCESS AND USABILITY WORK

Design Approach

To design and deliver the new Hub, the team took a user-centered approach, which included

- **Contextual inquiries** across the business in various office locations
- **SUS tests** (standard usability scoring surveys) of the old and new Hubs
- **Co-design cafes,** in which design team members divided participants into teams and gave them scenario-based tasks with the goal of engaging the business and gaining insight
- **Usability testing** throughout the design evolution
- **Design evolution transparency** via a blog
- **Solution walkthroughs** via webinar with key stakeholders, execs, and employees as the design evolved to make the transition on launch day easier

All design café sessions were advertised on the Hub so that employees would feel like they were a part of the process and therefore owned the solution.

The team used an Agile approach on the project. "We felt that because a lot of what we were trying to achieve hadn't been done before, developers couldn't tell us how long anything would take to build, so Agile was the only way," says Maddox. "We managed the project through sprints, focusing on must have features and working towards 'dream state' designs."

Contextual inquiry sessions and SUS test research revealed the following key findings:

- **Irrelevant content leads to low engagement.** The new design solution had to include content that's relevant to users (by location, role, and employee type). This approach informed the homepage design.
- **Employees struggle to find information.** This finding led to an ongoing commitment to improve search and sparked the idea for the tiles and megamenu design.
- **Social media is not viewed as work.** The team knew that, in order to increase adoption, the activity feed would need a prominent location on the homepage, but there was a perception that social media wasn't business-valuable. So, team members focused their efforts to ensure that they delivered a time-based feed that is personally relevant to users and incorporates corporate content. They also had to gain executive and management support for this feature by demonstrating usage and communicating efficiency benefits of the platform. One of the ways they did this was to point out the inefficiencies of email communication.
- **System performance.** The perception that the Hub was slow made it essential that the new Hub be fast and reliable, and that the platform could be used to alleviate reliance on other platforms (such as email).
- **Search as an opportunity for engagement.** Search was seen as an opportunity to drive usage, so it was critical to provide fast, reliable, and relevant people search and seek opportunities to integrate existing systems.

TIMELINE

The overall design time frame was nine months:

INTRANET TIMELINE	
Milestone Date	**Milestone Description**
2002	• Multiple intranets across different geographic locations • Design and editorial guidelines documented
2007–2008	• Large CMS upgrade project (from Vignette 6 to Vignette 7) • Intranet relaunch with new homepage and menu structure
2010	• Hub Evolution project—Phase 1 launch; this full intranet redesign included a comprehensive content audit and restructuring to focus the intranet on: o employee needs o identity o location o usability o search
April 2012	• New Hub proof-of-concept starts
February 2013	• Launch of new Hub

CONTENT AND CONTENT CONTRIBUTORS

An Inclusive Model

The Hub model is unique in that it's inclusive—everyone has access to create news articles and participate in communities (the publishing model is public by default). There are no approvals or reviewers. The Hub's publishing model is largely decentralized, with content authors responsible for publishing content related to their area or function. The Internal Communications is responsible for delivering corporate content, but all users can submit news stories. Also, anyone can contribute to collaboration sites.

Authors are forced to use a standard set of templates and styles that ensure consistency across the site. Beyond that, publishing is open to all and authors are given support in a variety of different ways.

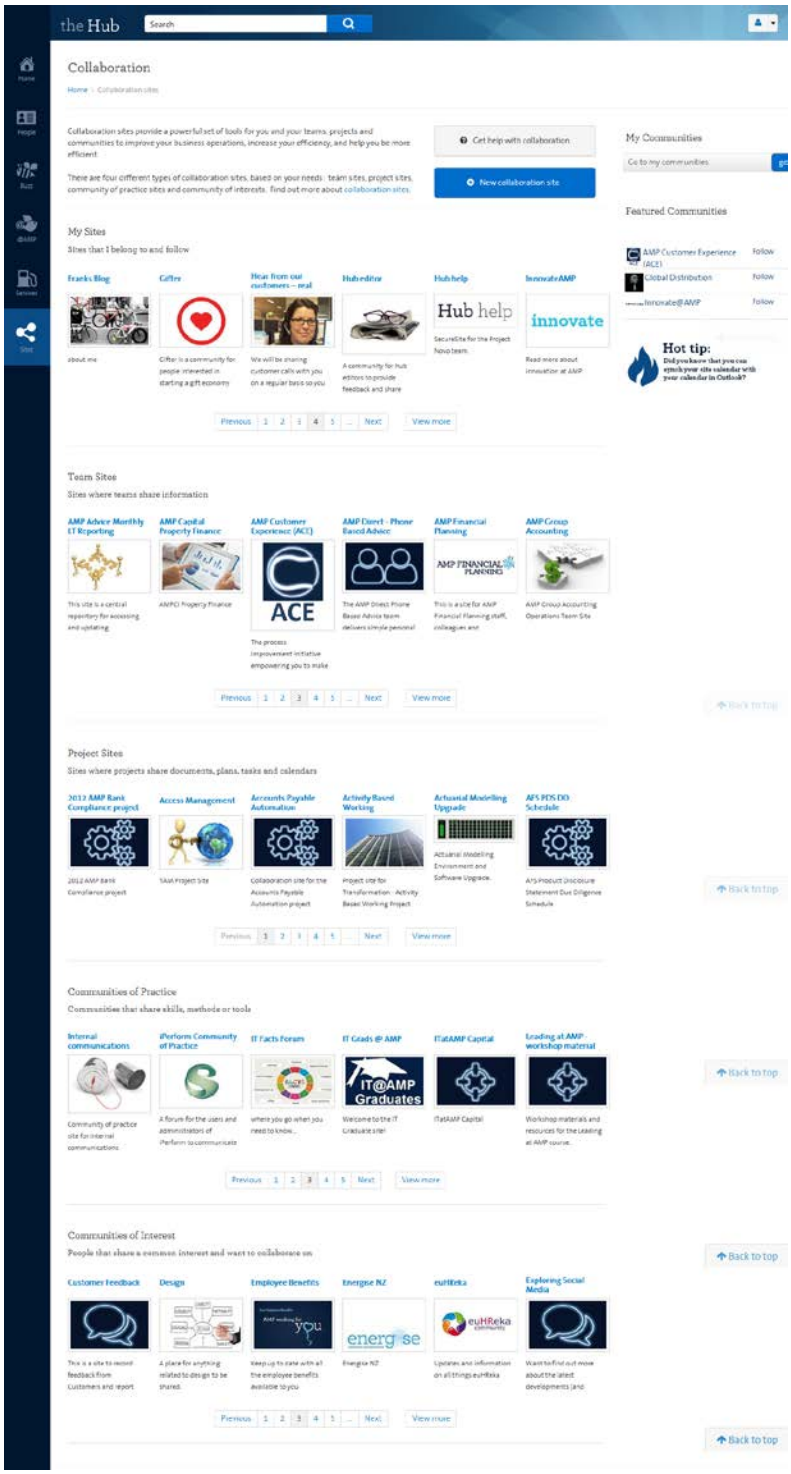
"We provide several levels of support for content authors," says Staresina, including *Hub Help*, a community for all Hub users whether they are content authors, collaboration site users, or owners. "Employees can ask questions on the feed and

often other members of the community or the Collaboration team will assist, usually within hours."

Hub Help also includes dozens of self-help guides, including videos, and a support mailbox that is monitored daily. Team members run weekly webinars focused on specific topics, part of the organization's "Collaboration U" program. They also offer one-on-one and team training, as requested.

"We're also looking at implementing a 'live chat'-type support program and Hub cafes (weekly drop in sessions)," says Staresina. "And tips and tricks are regularly published in the campaign space on the Hub homepage."

The team works hard to support content authors. As part of the site's intranet governance, team members work with content authors to ensure that their content is regularly updated, on brand, and user friendly. "We also work with content authors to help them design new sections of the site and reorder existing sections to make it more usable," she says.



Four types of collaboration sites are available to employees: team sites, project sites, communities of practice, and communities of interest. On the collaboration sites landing page, employees have the option to access the sites they're following (visible in the *My sites* webpart) or browse all public sites, which are organized by type.

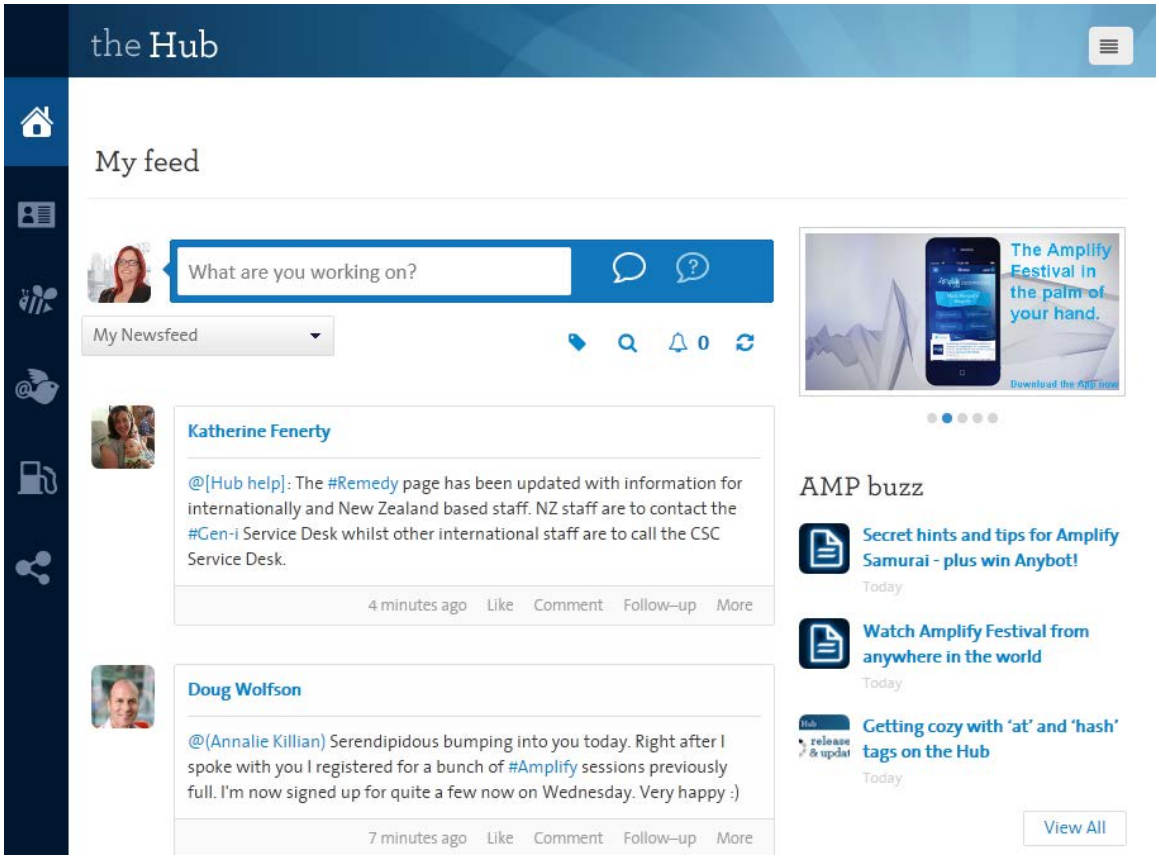
TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and O/S	• Windows server 2008 R2 Standard, 64-bit OS • 4 core processors, 16 GB Ram
Bug Tracking/Quality Assurance	• SharePoint task list • Quality Centre
Design Tools	• Axure: visual design • Balsamiq: page layout and functions • Sticky sorter: card sorting • Dreamweaver: prototype development • Adobe Creative Suite (mainly Photoshop, illustrator, and Dreamweaver) • SharePoint designer, Visual Studio 2010
Site Building Tools	• SharePoint designer, Powershell for SharePoint • TwitterBootstrap: framework for responsive design and base style library
Content Management Tools	• SharePoint 2010
Search	• FAST for SharePoint 2010
Other Functions	• NewsGator Social Sites • K2 workflows for auto provisioning of the communities • NewsGator Activity feed and hash tagging • Auto sync of photos between Outlook and SharePoint • Targeting news to users based on their profile

MOBILE

Although AMP's mobile strategy is still maturing, it was still important to make mobile a priority, even in a limited fashion at rollout. "Our goal in this refresh was to ensure that the Hub was available on any device and anywhere," says Staresina.

The team used responsive web design to optimize the site for iPhones, iPads, and other screens. The emphasis right now is to make sure that all content—including social content—can be consumed on mobile, but to not necessarily enable users to create or edit content from mobile devices.



The Hub intranet as viewed on an iPad.

SEARCH

The AMP team knew from talking to users that effective search would be critical to the Hub's success. And experience told them that search is a journey—not a destination. It takes time to "get it right" and really, there's no such thing as "right" because refining search results is an ever-evolving process.

The team chose FAST search, which integrates with SharePoint to deliver integrated content and managed metadata. Here's how they implemented the tool:

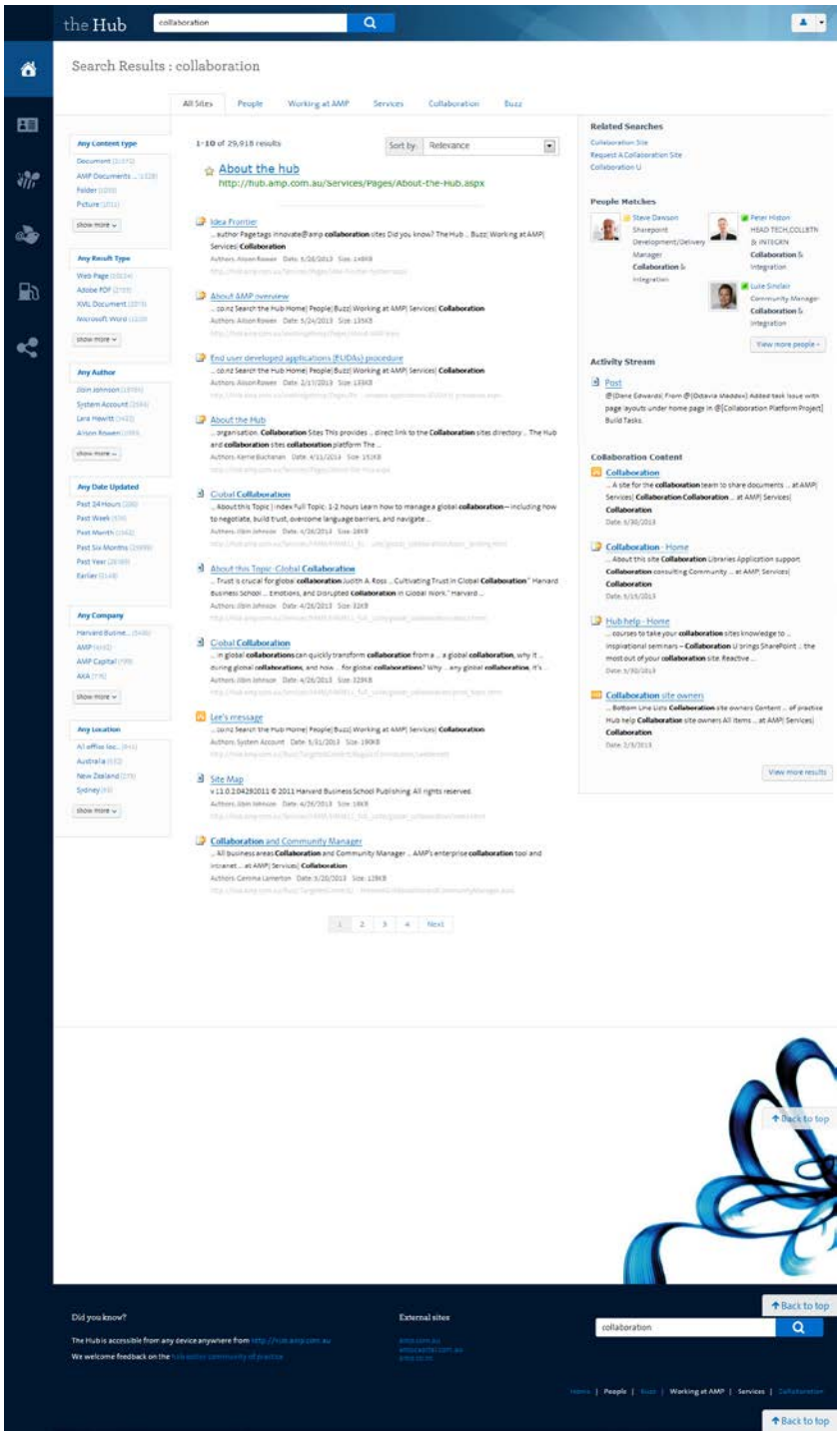
"For search results, we mirrored our search scopes against our IA," says Maddox. "We split out collaboration sites from main Hub results to negate the issues created by an open content model. For example, imagine that someone working is on an HR policy in a collaboration site, and you as an end user are searching for that policy.

You don't want to come across the work product but rather the published and trusted product."

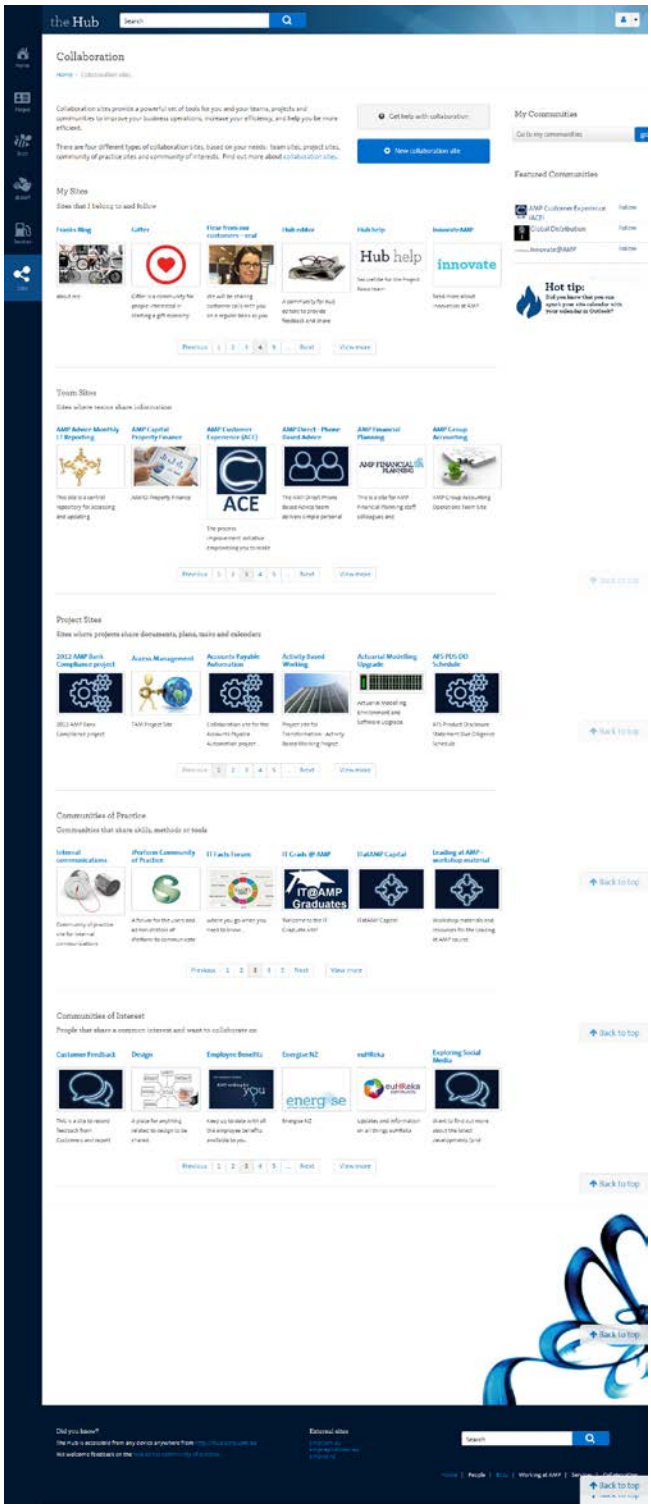
The new search, while solving many problems, also introduced a few. During the user research activities, the team found that employees generally felt like the Hub's content was trusted and comprehensive. However, when the new Hub launched and the search engine was more robust and targeted, outdated and untrusted content started to surface.

"As a result, we made it a key priority to do some post-launch enhancements," says Staresina. These enhancements included:

- A content audit (as part of governance, to reduce old content)
- Type-ahead search
- Role search
- Search scopes
- A best bets form (making it easy for collaboration teams to make a best bet instead of bother the system administrator)



Search mirrors the Hub navigation and enables drilling down into specific content. Collaboration material is kept separate from the primary results to alleviate the risk of people viewing working documents as finals. The site's open-by-default model enables better knowledge reuse by making all collaboration content searchable across the entire organization, unless content resides in a private library.



Because users can filter search result based on Hub sections, search is easy and powerful. People matches will display if the keyword appears in their job description or in their profile's "about me," or "my interests" sections. Users can also see results by document type, author, and/or date range. Search suggestions also help users if there's a typo or similar content to display.

RESULTS AND ROI

The new Hub is still relatively new, and measuring results will take time.

“ROI is something that we’re interested in measuring,” says Staresina, “but it’s still early days. We’re taking this time to observe usage and behaviors to establish a genuine benchmark, especially around social content. In determining success, we’re looking at uptake over time, but we’re also looking at the anecdotal evidence of how this has been successful.”

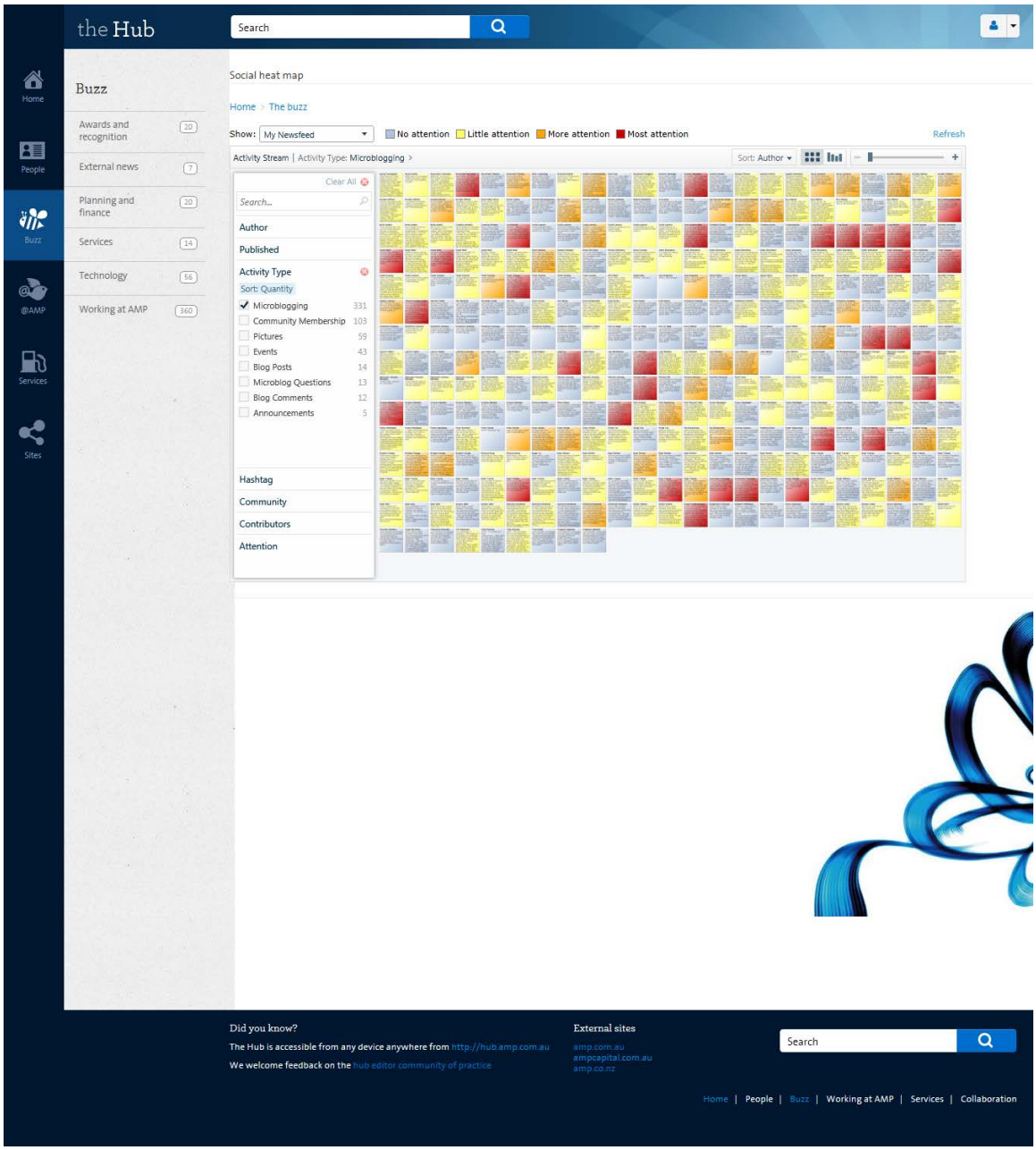
She calls this a “period of calibration.”

“We know it takes time to integrate new ways of working into AMP’s culture and didn’t expect massive adoption on day one,” she says. “In fact, our adoption rate has mirrored the Roger Innovation Curve. The early adopters have taken the new tools and run away with them, while a small percentage hasn’t engaged at all. Our challenge is the middle majority, who need to see other people use it first to be convinced of the business value before they decide to use it. To address this and drive adoption, we are relying on an extensive adoption and awareness plan, as well as a strategic community plan.”

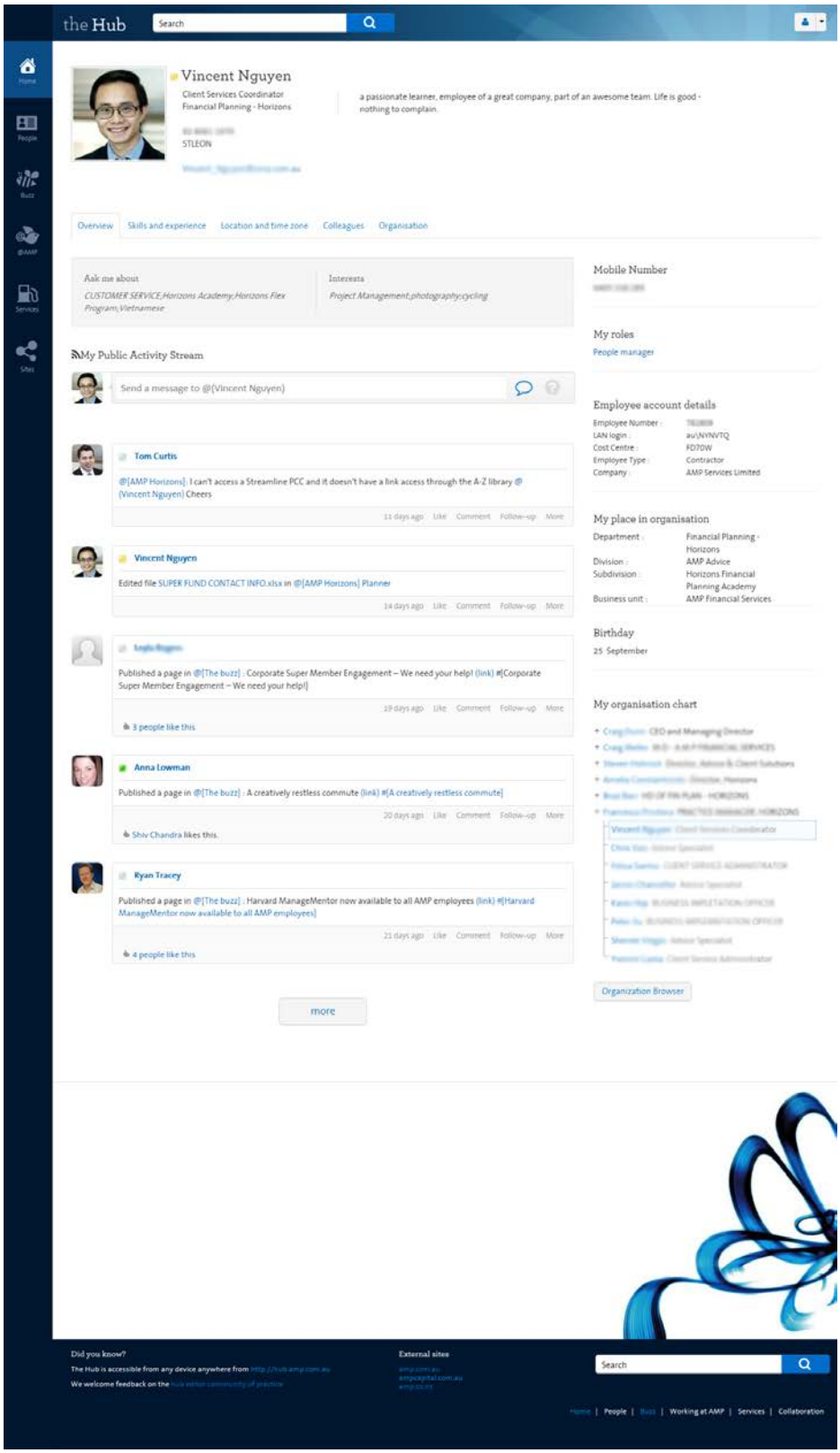
In an effort to increase overall site usage, the team has encouraged the creation of collaboration sites. This strategy has been very successful, resulting in four to five times as many collaboration sites created on the new Hub as on the old site. It also helps that the company’s Project Office has mandated that all projects have a site for project collaboration. With the good, comes the bad (or challenging), however; the proliferation of new sites has made governance a challenge.

Although not a success that can be measured in numbers, the company counts the integration of a subsidiary company’s intranet into the Hub as a win.

And, as people begin using the new intranet, they’re finding opportunities for even more ways to use it. “We have had a surge in consulting requests from the business,” says Maddox, “with in excess of 10 teams wanting to extend the hub for core business functions.”



This is a view of the social heat map, which has been filtered to display only microblogs. This visually powerful tool gives users a quick overview of trending topics. This section can be filtered by most-used hashtags, trending communities, and the most popular uploaded images.



This is a zoomed-in display of the social heat map of one of the hot topic microblogs that has generated a lot of activity.

LESSONS LEARNED

AMP team members share their lessons learned:

- **Content must be fresh.** "A 'like for like' content migration does not work, irrespective of what the research tells you or how recently the content was reviewed. Our research strongly supported the view that the content was good quality, trusted, and the right amount. The new design made content more accessible and findable (surfacing out of date content). Subsequently, we have done a lot of work to update the content to reflect the new Hub." (Maddox)
- **Communication facilitates change.** "A dedicated community-management team is critical to success in social collaboration, and our investment in resourcing this area demonstrates our commitment to success. The approach to change management was focused on the user. Creating greater connection with the user profile, having an honest and open dialogue about expectations—and aligning these—and inviting users to participate in the design itself were core elements of this. Design elements were made visible early. Staff was kept up to date via news items, management briefings, design walkthroughs, internal networks, and a blog about the evolving design. Staff was actively engaged in the design process through design cafes, where they could have a go at designing the Hub themselves. This promoted engagement, empathy, ownership, and the view that the new Hub was owned by staff." (Maddox)
- **An Agile approach accommodates the unknowable.** "Creating an innovative intranet is not easy. You are pushing technology to its limits and many of the things we build no one on the project had heard of before, let alone tried to build. This was almost impossible to estimate in terms and effort and cost. This means a waterfall approach cannot work for innovative solutions. Instead, we ordered features based on priority and set about building each within the constrained time frame. We didn't get everything built, but we went a long way towards the envisioned end product. Wireframes and sketches were a key way of managing and communicating requirements." (Maddox)
- **Create a culture of user-centered design.** "Having user experience designers in a team is not enough. The whole team needs to adopt a user-centered design culture and approach. This was achieved by having a design stream, design lead, persona generation, research around the business involving the team, and being a user champion at any opportunity." (Maddox)
- **Have fun.** "We made sure the team had fun, we worked hard and ensured we had a laugh. Weekend work was a constant, we made it fun by turning them into 'party weekends' with DJ sessions, snacks, and shared lunches." (Maddox)
- **Launch is just another milestone, not the end of the road.** "Have a plan in place to deal with post-launch issues and enhancement requests. We worked in fortnightly sprint cycles, where we'd prioritize issues and enhancements based on platform priorities and user feedback. This Agile process was key—and continues to be key for us—in managing a deluge of work that came post launch." (Staresina)

International Monetary Fund (IMF)

Using the intranet: The International Monetary Fund (IMF) is an organization of 188 member countries working to foster global monetary cooperation, secure financial stability, facilitate international trade, promote high employment and sustainable economic growth, and reduce poverty around the world.

Headquarters: Washington, D.C.

Number of employees the intranet supports: Approximately 5,000

Company locations: IMF has offices in more than 100 countries.

Locations where people use the intranet: US headquarters, as well as offices and travelling staff in 188 member countries.

Design team: The IMF intranet was designed by consulting firm Threespot in close collaboration with the IMF project team, comprising members from the Technology and General Services (TGS) Department and the Communications Department's Internal Communications team.

In-house members: Archana Kumar, former Internal Communications Chief; Camilla Andersen, current Internal Communications Chief; Deb Reilly, Chief of Information and Knowledge Management Division; Hari Maddineni, Chief of SharePoint Intranet Section; Begoña Nuñez Allue, Communications Officer; Hélène Faurès, IT Project Manager; Sonia Dwyer, Enterprise Information Architect; Rajitha Devineni, Business Analyst; Graham Dwyer, Senior Communications Officer; Aissata Sidibe, Communications Assistant; Padraic Hughes, Chief of Media Services Section; Scott Merker, Designer; Vera Rhoads, User Experience Specialist; Shishir Bhandari, Technical Lead; Joshua Sampson, Solutions Architect; Vijay Challa, SharePoint Architect

Threespot: Jamie Colucci, Account Director; Anna Rappoport, Project Manager; Hallie Wilfert, User Experience Lead; James Early, Creative Director; Paul Zolandz, Art Director; Phil Gosier, Partner/Director of Design

SUMMARY

Even well-designed intranets stay that way only when there is a plan in place for use and growth. That's what the International Monetary Fund (IMF) discovered as its intranet grew and expanded over time. The organization found itself in need of a makeover to incorporate new technologies, update a now-dated design, and generally clean up the clutter that can creep onto any intranet site.

A lesson learned from the previous project was that the need for intranet governance is critical to an intranet's success. Sites cannot maintain themselves. Growth can quickly get out of hand. That's why a key part of the IMF's redesign was to create an intranet governance structure to plan for and maintain future growth.

Previously, there was no central ownership of the site or overall strategy for maintenance. Responsibility was shared, with the Communications Department (COM) taking care of the homepage and news, IT controlling the technology, and departments and other groups managing their own sites.

The team created the Intranet Council, consisting of nine members from different departments representing all the departments at the IMF. The Council's work started when the redesign was finished: its job is to sustain the gains made in the redesign by developing and enforcing guidelines and standards, and managing the growth of the site.

The team worked with Threespot (a digital agency) to do initial user research, create wireframes and designs, write functional specifications, and create the governance framework. The project used a variety of user research methods to make sure the

team was headed in the right direction. Team members started with a large-scale survey and moved to contextual inquiries, focus groups, and analysis of search logs and web statistics.

The intranet homepage focuses on news in the center carousel. The clean interface highlights six items, with each item's headline listed at the bottom of the carousel. This gives users a quick way to access content of interest and an easy way to scan content without having to navigate through the carousel or wait for an animation to occur. The first four items highlight internal news stories. The fifth spot is reserved for a promotional item, while the sixth features the *Morning Press* application, which provides links to the top external news stories about IMF.

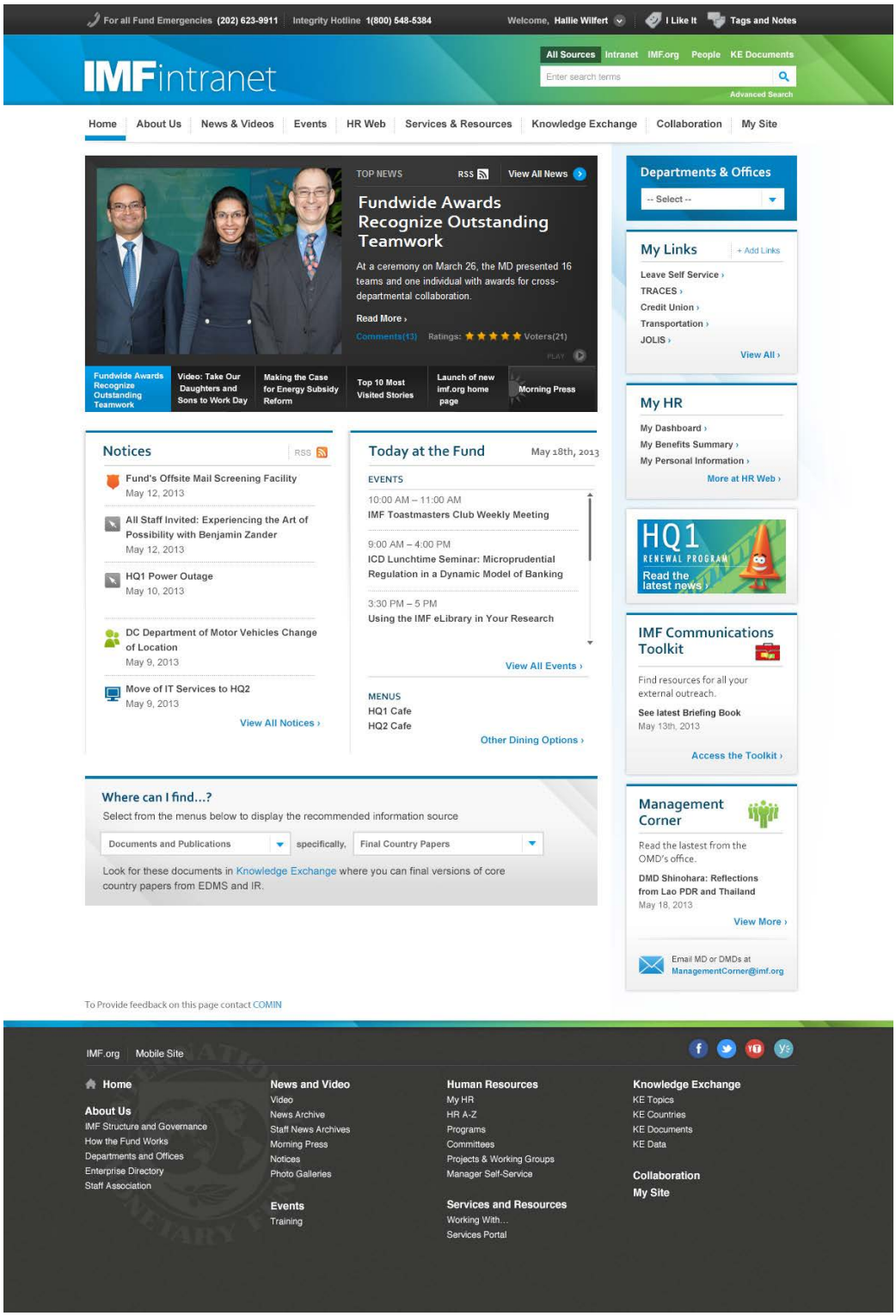
The highlighted panel features a relevant image, headline, and summary with a link to read more. The number of comments and the average rating is displayed, along with the number of people who commented on the article, and the rating they gave it out of 5 stars.

Below the carousel, the newly designed *Notices* area—which was previously a box with a bunch of links—prominently highlights important announcements to staff. The topic and date are listed, with icons that indicate the type of notice: *Security*, *IT*, *Human Resources*, *Management*, *HQ and Facilities*, or *General*. The site also includes the ability to post emergency notices in a prominent space at the top of the homepage; this is a feature the team hopes not to need, but which is reassuring to have.

Events and cafeteria menus are listed under *Today at the IMF*. Early research showed employees valued quick access to cafeteria menus, so they're still featured on the homepage.

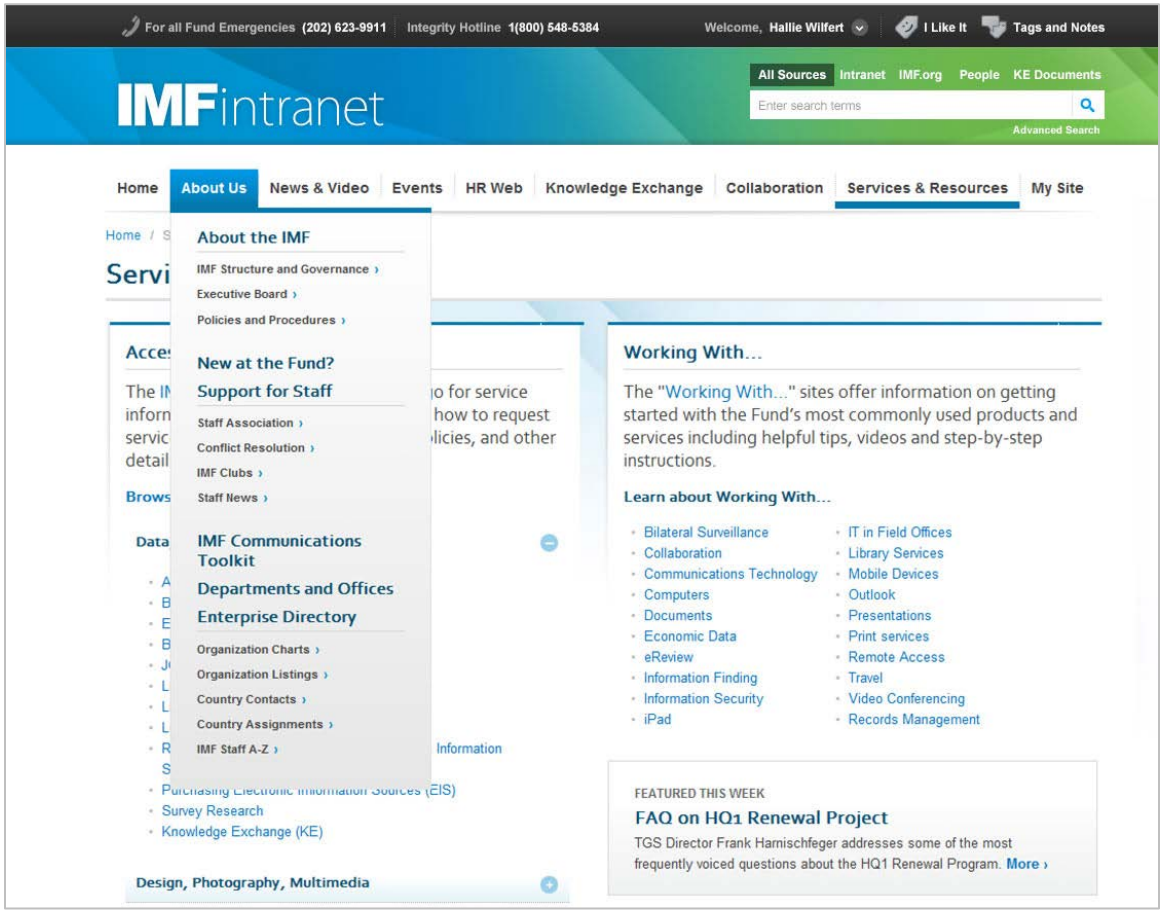
The right side of the page includes a way to quickly access Departments and Offices, a list of personalized links, and links to Human Resources information. *My Links* are selected for users to target major staff groups—such as economist, assistant, or non-US employee—based on extensive user research. Users can customize these links. The *Communications Toolkit*, a set of items to aid in communicating externally, is also available, as is a box dedicated to news and messages from Management.

The *Where can I find?* information directory comes from an old information locator widget that was on the prior site. This was developed to act as a navigation map to direct employees to the best starting points for 30 subcategories of information, which are grouped into six broader categories. This newer version of the tool has been well received by employees, and particularly by new staff, as it helps direct users to the best resources for key information, such as economic and financial data, topic primers, finalized country reports, and guidelines for working with member countries. The tool provides a description of each resource and a quick link directly to that resource (that is, to the intranet page or application).



The intranet homepage focuses on current information: latest news stories, announcements and updates, and events happening at the IMF that day. The page also features tools to move users to information quickly: *My Links*, *My HR*, and the *Information Directory*.

Clear navigation helps employees access content quickly. Megamenus reveal the site structure and categories of content within major areas. The user's current location in the site is clearly indicated with a blue underline.

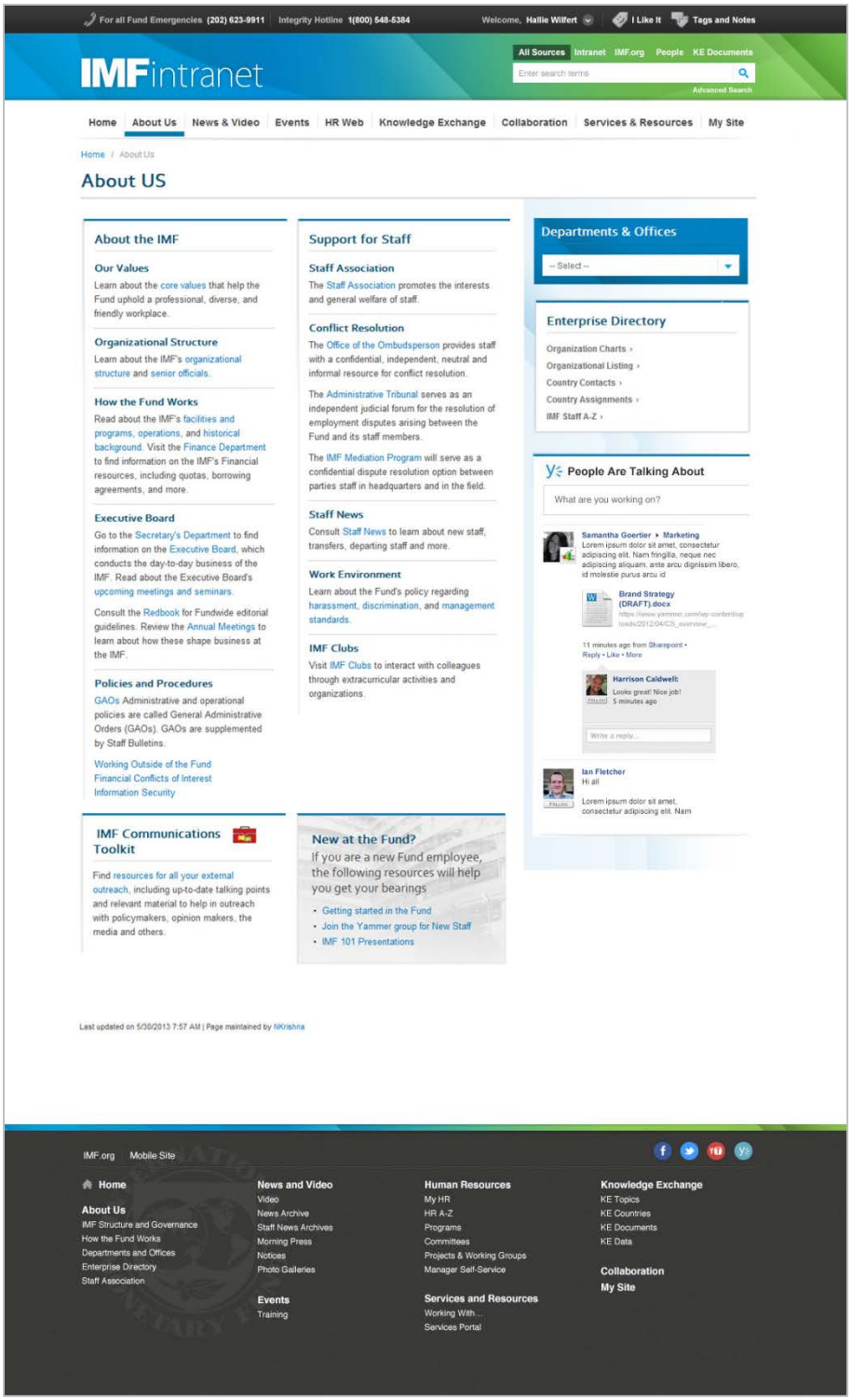


Categories are clear and distinct. The user's current location, *Services & Resources*, is indicated by a thick blue underline.

The *About Us* and *Collaboration* landing pages include a Yammer feed. Yammer is integrated throughout the site as a way to actively engage employees in conversation. Integrating social content in the main site, rather than requiring users to go to a separate tool to communicate with one another, is a great way to encourage participation. The Yammer feeds show current conversations as a way to keep people connected to one another.

There are 208 Yammer groups at IMF, with Yammer web parts that allow both reading and posting integrated into team sites. When new team sites are created, the intranet team encourages the team to create a Yammer group and include a feed on the site. Feeds can be created based on groups, company, an individual, or even a keyword.

Although some employees started using Yammer, its use is not yet widespread within the organization. The intranet team is currently planning to do a campaign around the use of Yammer and other social tools and features to further increase engagement, communication, and collaboration.



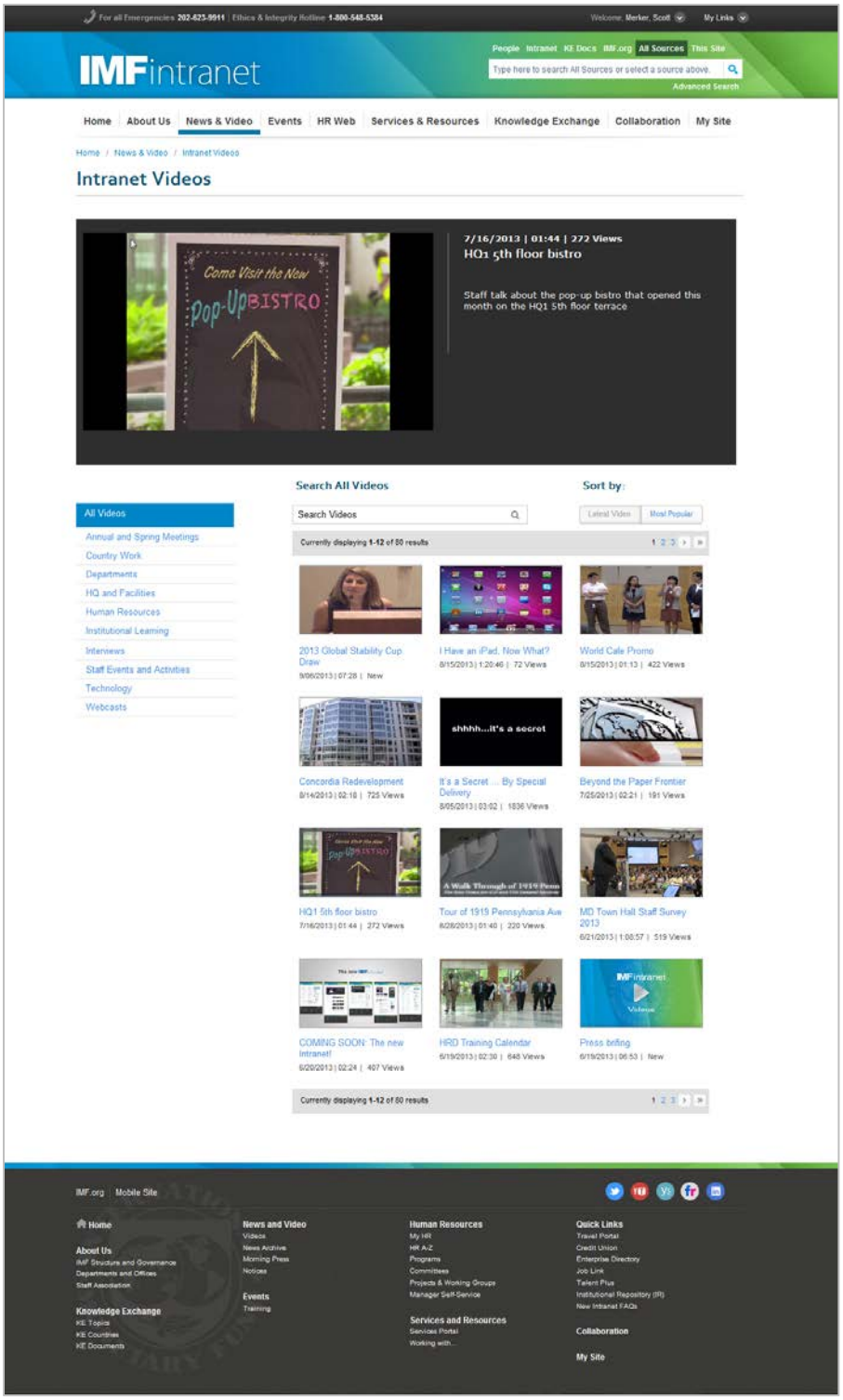
The site integrates Yammer feeds in key areas. Employees can read or post content via the feed.

The site contains a lot of video content, but the previous design lacked a central location for it, which caused many user complaints. The site's videos now have a

central location, with featured videos that are regularly updated. Videos are embedded in pages throughout the site (such as within news articles or on departmental pages), and are all centrally catalogued in this section.

Individual departments can request video content from IMF's Multimedia team, which coordinates with COM to approve, modify, or request video proposals. The upload process is centralized and maintained by COM and the IMF's IT department, Technology and General Services (TGS).

Users can view the featured video or browse videos. Videos are listed chronologically, with the most recent content first. Users can also sort the videos by popularity or browse through video categories, such as *Institutional Learning*, *Human Resources*, and *Interviews*. Each video includes the title, date, a still from the video showing some content, and the video's length. The video will play where the featured video is located, at the top of the page. The page also lists the number of views for each video, helping users know what their colleagues are watching.

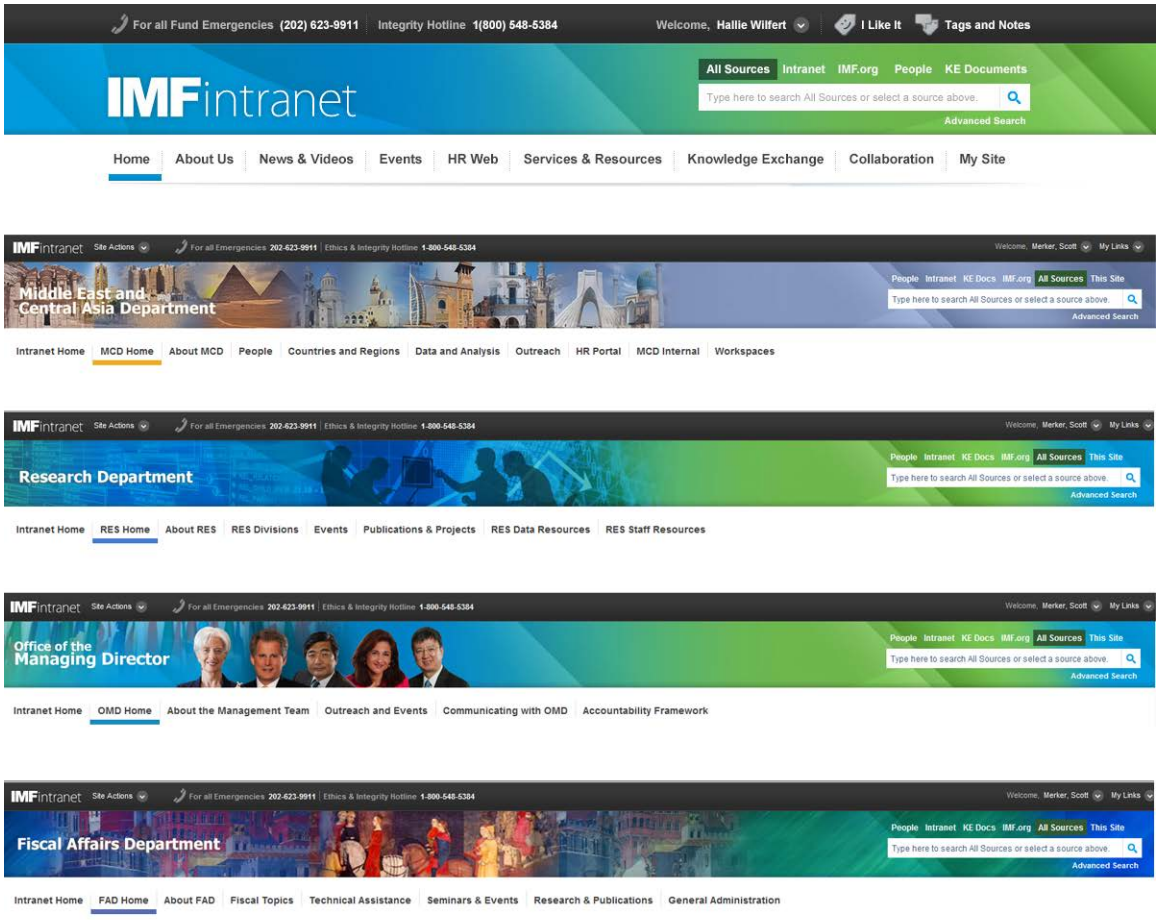


The *News & Video* section of the site includes a video library, where users can search or browse to find content of interest.

Departments have their own sites and content, but the sites are integrated into the main intranet's structure. Each department has its own header, but follows a similar

structure. The first link across the top navigation is to the main intranet *Home*, followed by a link to that department's homepage, such as *MCD Home*. Each site includes an *About* section and then has its own navigational categories, which were created with the help of the enterprise IA team, using card-sorting exercises as a starting point for the navigation structure.

Within department pages and across the entire intranet, the intranet search defaults to *All Sources*, the broadest possible scope; this helps users who might be looking for content that could appear in any intranet area. Users can also narrow their scope to the current site via a *This Site* link above the open search box. Filler text in the search field directs users to change the scope of their search if necessary. Users can also narrow their results on the search results page as needed using content area filters—such as *HR*, *services*, and *news*—as well as department, country, date range, and file type.



Department pages have their own header, but follow the intranet's general structure. Each departmental site has a persistent link to the main intranet homepage, *Intranet Home*, on the left side of the top site navigation.

The team realized that, in creating the new site, change leadership was essential and it worked closely with stakeholders and departments to keep them informed and involved. One big change was for content owners, who were used to having a dedicated space on the previously crowded homepage. Communicating a new plan

for them was essential. At the same time, the team realized that the revamp would mean a significant change in staff members' daily routine, accessing the intranet, so they paid special attention to developing a comprehensive communications plan. For the overall organization, the team posted news stories about objectives and timing, gave several presentations about the new design prior to launch, offered a sneak-peek of the new designs both online and during an information symposium, and had a broad pre-launch campaign in the two weeks leading up to the launch. The campaign included a news article with screenshots of the new pages, a short video highlighting the main changes, an online preview tour of the new site, and posters and desk-to-desk flyers announcing the launch.



An example of the desk flyers used to announce the launch.

The site has been a success. Engagement, measured by participation in commenting and rating, has more than doubled. The team will do a follow-up survey to further evaluate the site's success six months after launch; this will give employees time to adapt to using the new site. Creating an organized and streamlined site, with an Intranet Council to keep it in check, is helping ensure that the intranet remains a powerful tool for employee communication.

BACKGROUND

It had been a while since the IMF intranet had been truly updated. The previous intranet redesign happened seven years ago. At that time, a lot of effort and resources were spent sorting out the IA, applying consistent navigation, and updating the design.

Following that redesign, the intranet continued to evolve to meet the organization's demands. Various IT innovations were added to keep up with content growth and to integrate new technologies and trends, including new web collaboration and knowledge-sharing applications (Knowledge Exchange and eReview); a new search engine that provided more flexibility for search filters and targeted content (FAST); a new *Calendar of Events*; the social network Yammer; and a homepage *News Rotator*.

Despite those incremental improvements, the site really needed a refresh to bring it up to current standards and to address the cluttered homepage that had resulted from years of minor modifications and additions. In other words, it was time for a change.

In December 2011, the IMF gathered the necessary resources and a very capable team to kick off the project.

Goals

The project's overarching goals were threefold:

- Deliver a user-focused design to meet the business needs of IMF staff
- Make the intranet not only a useful tool for staff, but also an engaging place where people would come to get information and share views
- Bring the intranet in line with current intranet best practices and technologies

Specifically, the organization wanted to achieve several tactical improvements with the new intranet:

- A less cluttered and more organized homepage
- Easy access to resources that employees need for their daily work (based on their own preferences)
- A sound IA and clear visual hierarchy
- Uniform branding across the intranet so users would have a consistent browsing experience
- Modern intranet features to provide personalization, increase staff participation, and improve information findability
- A governance structure to ensure that the intranet will continue to grow and be maintained in a controlled and sustainable way with future growth in mind

Challenges

Every project has its challenges, and the IMF's intranet redesign is no different. The organization struggled with basic project challenges related to timeline and technology, but also experienced some organizational challenges as they had to convince content owners and stakeholders that some content house cleaning would

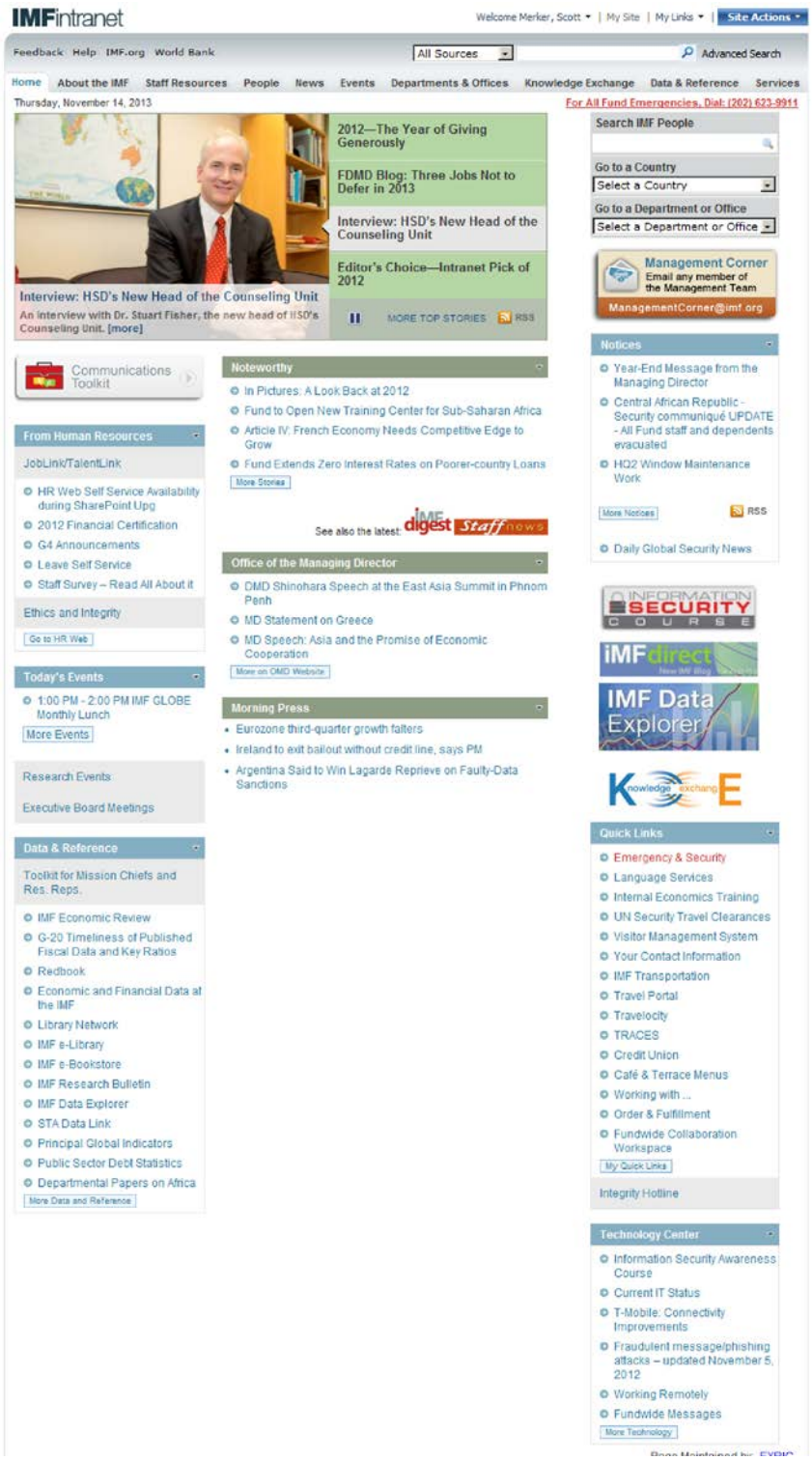
be beneficial for the new site. In the following, IMF team members explain these two types of challenges.

Change management challenges:

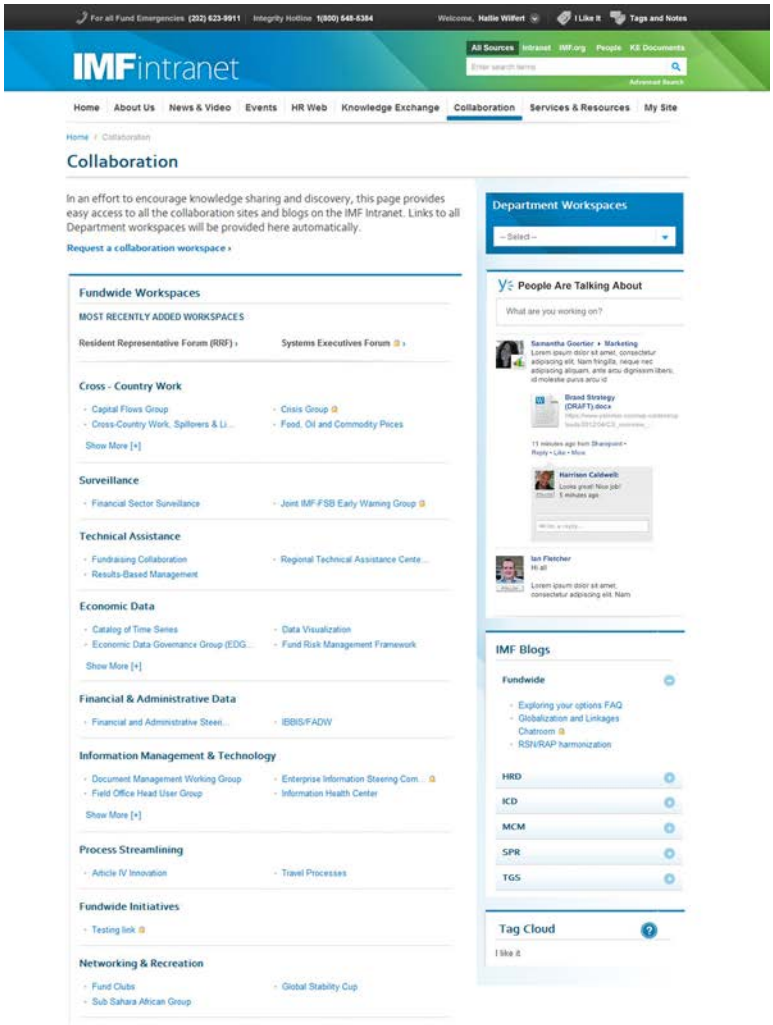
- "Change leadership was a very important aspect of this project. Content owners were really attached to having their dedicated space on the homepage. We had to convince them to share the prime real estate, and offered effective solutions." (Helene Faurès, IT Project Manager)
- "During the design phase, some decisions to make content changes that would benefit the organization as a whole were met with resistance from business stakeholders who were attached to the content they authored, even if it was not being used or needed to be re-positioned. We worked through this with face-to-face meetings, showing hard numbers and end user feedback, until we got the necessary buy-in." (Sonia Dwyer, Enterprise Information Architect)

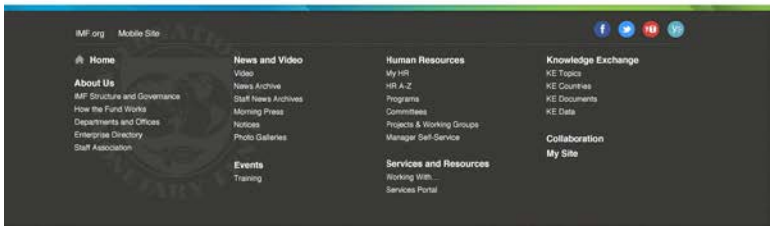
Technology challenges:

- "The implementation phase of the project took longer than anticipated. This was in part due to the fact that some features of the designs, which we were told could be implemented in our SharePoint environment, ended up being difficult or impossible to develop." (Faurès)

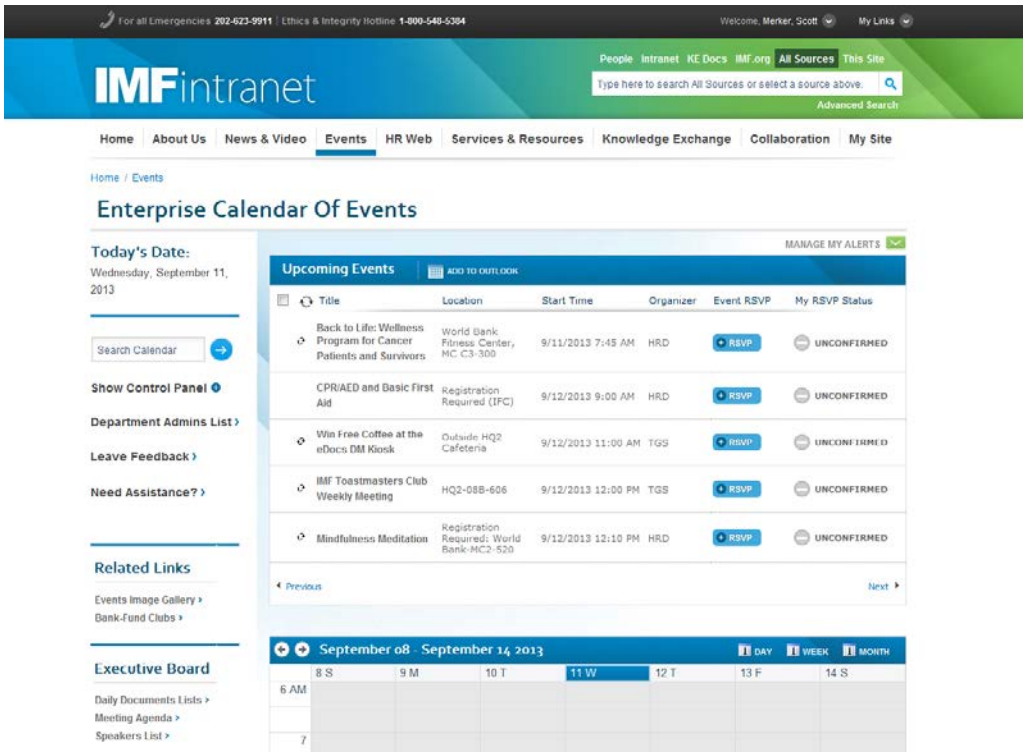


This is the IMF intranet homepage before the redesign. The initially sleek homepage had become cluttered due to competing demands from various content owners, and the IA had become less relevant due to the introduction of new and unanticipated content.





In an effort to encourage knowledge sharing and discovery, the *Collaboration* page provides easy access to all cross-departmental collaboration sites and links to each department's collection of workspaces and blogs on the IMF intranet. Several different social media technologies have been or are being integrated in the intranet, including content ratings and social bookmarks (using tagging). Blogs and SharePoint team collaboration sites are heavily used. The *Collaboration* page also showcases the integration with Yammer (the IMF social network).



The newly redesigned *Calendar of Events* displays what is happening at the IMF.

INTRANET REDESIGN PROJECT TEAM



The intranet team (left to right): Camilla Andersen, Graham Dwyer, Begoña Nuñez Allue, Hari Maddineni, Aissata Sidibe, Hélène Faurès, Jamie Colucci (Threespot), Rajitha Devineni, Joshua Sampson, Deb Reilly, Shishir Bhandari, Phil Gosier (Threespot), Vijay Challa, Scott Merker, Hallie Wilfert (Threespot), and Archana Kumar. Missing from photo: Sonia Dwyer, Padraic Hughes, Vera Rhoads, Anna Rappoport (Threespot), James Early (Threespot), and Paul Zolandz (Threespot).

GOVERNANCE

Ownership

Prior to the redesign, the IMF intranet had no clear owner. Various stakeholders owned (or controlled) different parts of the site, with COM at the forefront controlling the main areas of the homepage as well as the news and notices pages, and the IT department controlling all the technology, software, and applications software, as well as the IA and search engine and interface.

“Other departments or groups requested to have their content posted in various spaces on an as-needed (often as-demanded!) basis,” says Begoña Nuñez Allue, Communications Officer, “which is why the homepage had grown in a rather chaotic way.”

In addition, each individual department managed its own websites within the intranet. “This decentralized approach lacked cohesiveness and communication among the parties,” she says. “In particular, it lacked a group or a body that would

be in charge of the vision and overall strategy of the intranet, which is why defining a governance structure was a key objective of this project. We felt there was no point in going through a redesign if it would all be going down the drain once it was handed back to its multiple owners!"

One of the main organizational objectives of the intranet redesign was to implement a governance structure to maintain the gains of the redesign and to drive sensible, cohesive growth. This has entailed the establishment of an Intranet Council, responsible or issuing intranet standards and for providing strategic direction for the site overall. The council is made up of nine members, each representing different groups or departments.

The Intranet Council was formed to coincide with the launch of the new intranet, so it did not influence the project. "But we hope it [The Council] will help us keep our new intranet tidy and up-to-date and ensure that it continues to meet the evolving needs of our users," says Faurès.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Two Intranet Executive Sponsors	• Provide insight into organizational priorities, offer continued senior-level support, and represent the intranet to other senior executives
Intranet Council	• Define and communicate standards and strategic directions for the intranet
Intranet Manager	• Chair the Intranet Council, ensure compliance with Intranet governance, and act as liaison between the Council and Executive Sponsors
SharePoint Technical Team	• Manage SharePoint integration, development, and support
Applications Owners	• Direct the design, development, and maintenance of web-based intranet applications
Departmental Webmasters	• Design, maintain, and update departmental sites
Content Owners	• Post, update, and retire intranet content

USERS

All IMF staff members use the intranet, and it is set as the default homepage on all IMF computer browsers (although staff members can change this). The intranet is the key communication vehicle for conveying important information to all staff.

Some common uses of the intranet include:

- Read IMF-related news and notices, and learn about events

- Use tools and applications needed to do their work
- Submit requests for various services (facilities, multimedia, events)
- Search and apply for job openings
- View personal information
- Perform almost all HR-related tasks
- Search for information

Certain intranet areas are reserved for specific groups, including closed collaboration sites and some sections of the departmental websites, which are controlled by individual departments and often contain both a public area accessible to all staff and a restricted area accessible to the department only.

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	• http://www-intranet.imf.org/Pages/IntranetHome.aspx
Default Status	• The intranet is set as the default homepage on all staff members' computers, but they can change the default.
Remote Access	• Many IMF staff members work and access the intranet remotely on a regular basis. Remote access is provided through Windows Terminal Server (Citrix) from any computer or through SSL-VPN from IMF computers. • The organization is currently working to give iPad users access to mobile-friendly intranet pages and applications.

DESIGN PROCESS AND USABILITY WORK

Design Approach

There were certain aspects of the intranet design that the team knew had to be addressed—urgently—such as updating the look and feel, and decluttering the homepage. However, in order to gain in-depth knowledge of what other areas had to be targeted and what the project goals should be, the team did a lot of research in the project's early stages.

An early survey, conducted by IMF's partner, Threespot, was aimed at finding out the staff's preferences for the intranet: what they liked about it and what they didn't, what they would like to have on the new site, and so on.

The survey received what Nuñez calls "an incredible response," with more than 36% staff participation. "It allowed us to collect a vast amount of data from employees

related to their use and preferences. It gave us lots of raw data that could be dissected into pieces and analyzed in charts and spreadsheets, but it also gave us a lot of personal opinions and anecdotal evidence, which was helpful to understand how the staff truly felt about the intranet," she says.

The Threespot team also conducted contextual inquiries during which they went to people's offices to see how people actually used the intranet in their daily work. They conducted focus groups with staff from across the IMF, and interviewed key stakeholders and staff in positions at all levels. Lastly, they reviewed the search logs, web statistics, and other available data.

Overall, the new intranet design was developed following a user-centered approach and employing a variety of research methods, including:

- An IMF -wide survey in early 2012 that gathered responses from 1,230 participants
- Search log analysis of the top 100 search terms
- Site usage analysis of the top 100 most-visited pages on the intranet
- Sentiment analysis from comments derived from previous years' surveys conducted by TGS and COM
- Interviews with 20 business stakeholders and intranet users, during which each stakeholder answered eight questions
- An intranet news article issued August 12, 2012
- Usability testing with 10 intranet users
- Presentation of a new design to webmasters
- More than 100 meetings held with cross-functional teams, including the core project team and representatives from different functions, such as the COM team, SharePoint Intranet team, Enterprise Information Architecture team, Graphic Services, and the Web Infrastructure Team

During the planning phases, the project team spent a significant amount of time analyzing the user needs; once the design phase was underway, the project team went back to the users to present the new designs to stakeholders and all IMF staff at a well-attended meeting open to the entire organization.

"Ultimately," says Nuñez, "the research was extremely valuable in guiding both the overall direction of the project and the many individual parts of it."

"On the old homepage, content owners decided what content should be displayed and competed for the real estate," she says. "The intranet redesign delivered a streamlined, uncluttered homepage by drastically shifting the focus toward content that users need to do their daily work (relying on search and usage statistics), and encourages sharing of prime real estate among content owners."

TIMELINE

The overall project timeline was 18 months, from kick-off to launch.

INTRANET TIMELINE	
Milestone Date	**Milestone Description**
1996	• First IMF intranet
December 2011	• Redesign project kick-off
January 2012	• User needs analysis complete
April 2012	• Wireframes complete
July 2012	• Usability testing
July 2012	• Outreach: presentation of designs to all IMF staff, intranet news article, presentation of designs to stakeholders
August 2012	• Designs final
November 2012	• Functional specifications complete
December 2012	• Technical specifications complete
January 2013	• Start of development activities, including: o Develop/implement new designs for 11 pages provided by Threespot. o Apply new branding and styles to the rest of the 200+ pages in the homepage site collection. o SharePoint 2010 upgrade of the homepage site collection (remediation activities of components that were broken after the visual upgrade).
April 2013	• Start of quality assurance (QA) testing
May 2013	• New intranet ready for user acceptance testing
June 2013	• Launch of new design

CONTENT AND CONTENT CONTRIBUTORS

The IMF intranet uses SharePoint's native CMS features. SharePoint was chosen not specifically for its CMS capabilities but for its full range of functionalities, including content management, search, collaboration, and social media functionalities.

The IMF intranet has a distributed content model governed by a newly formed IMF Intranet Council. The enterprise IA team guides the IA, search, and content standards. Individual departments develop and post their own content. The COM team is in charge of producing and coordinating the flow of the daily news on the homepage, and reviews and approves other top-level content on the intranet. The COM team has 10 members and receives content contributions from staff across more than 20 IMF departments and offices. The newly instituted Intranet Council will be working on a more comprehensive content strategy in the near future, with the goal of standardizing publishing workflows for centralized sites across the organization.

All intranet contributors receive extensive training and support, which includes ongoing internal in-person training courses. Extensive training and support materials and videos are available on the intranet, and the design team has published guidelines, tips, and best practices for authoring and sharing on the intranet. These are published on the *Working with SharePoint* site, the *Finding Fund-wide Information* site, and the *Enterprise Search* help site. These guidelines will be consolidated soon into a set of holistic governance documents, again through the organization's new Intranet Council. The guidelines will be made available to staff on the intranet.

Finally, a very active group of departmental webmasters—the SharePoint Users group—has been an excellent channel to exchange ideas, tips, and best practices.

TECHNOLOGY

On the technology front, the organization recently upgraded from SharePoint 2007 to 2010. SharePoint 2010 came with new social features such as tagging, which the organization will rollout and promote in the near future.

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and O/S	• Windows Server 2008 R2; infrastructure is virtual (4 WFE, 2 App on Content Farm, 2 App and 2 WFE is Services Farm, 4 FAST Servers)
Bug Tracking/Quality Assurance	• Excel (Quality Center is the official requirements and bug tracking tool)
Design Tools	• Visual Studio 2010; Adobe design suite
Site Building Tools	• SharePoint 2010
Content Management Tools	• SharePoint 2010, eDocs DM for document management
Search	• FAST for SharePoint 2010
Other Functions	• Mobile application development, Yammer for social collaboration, TagXchange (SOA tool for ratting, tagging, and commenting)

MOBILE

IMF staff members can access an anonymous (no authentication necessary) mobile-friendly intranet site from their Blackberry devices. The mobile site includes intranet news, notices, events, a *Communication Toolkit*, people search, and resources for working remotely. In addition, three departments currently have a mobile-friendly version of their departmental page.

The Blackberry-only approach was not intended to be the mobile endgame. “When we started working on the intranet redesign, our intent was to implement a responsive design using HTML5 and CSS3,” says Faurès. “However, we had to give up due to incompatibilities between Internet Explorer 9 and SharePoint 2010. Therefore, the team is currently at work on a custom intranet site for iPad users, with a target launch date of spring 2014.”

At that time, the team will most likely retire the Blackberry site.

This iPad-friendly version of the intranet will provide more available content as new iPad-friendly intranet sites and applications are launched. The first iPad-friendly application to go live will be eReview, a workflow application used to review and clear documents.

The jump from Blackberry to tablet devices makes sense as interest and usage of tablet devices has increased among the organization’s business clients. The IMF made the decision to support iPad devices a few years ago, and it now supports approximately 1,700 (IMF-provided) iPads and 500 personal iPads, and expects to add 1,000 more in coming months. With so many staff on-the-go and increasing demand, a decision was made recently to give every professional staff member an iPad, doubling the number of iPads in use across the organization. There is also

momentum toward iPhone adoption, and discussions are underway to allow IMF staff a choice between an iPhone and a Blackberry.

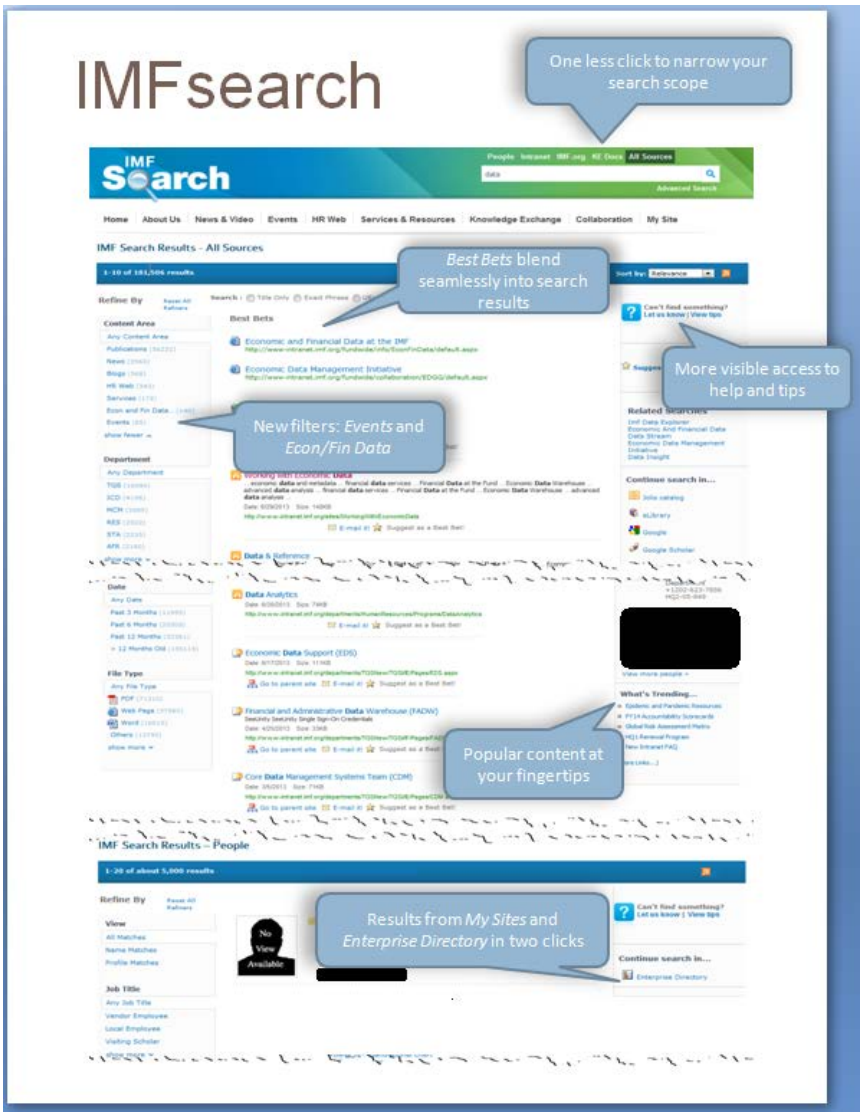
SEARCH

The IMF chose FAST Search for SharePoint 2010 for its intranet because it is rated as a top-tier search engine and is designed for the SharePoint platform. The decision to use FAST was made after reviewing other highly rated enterprise search engines.

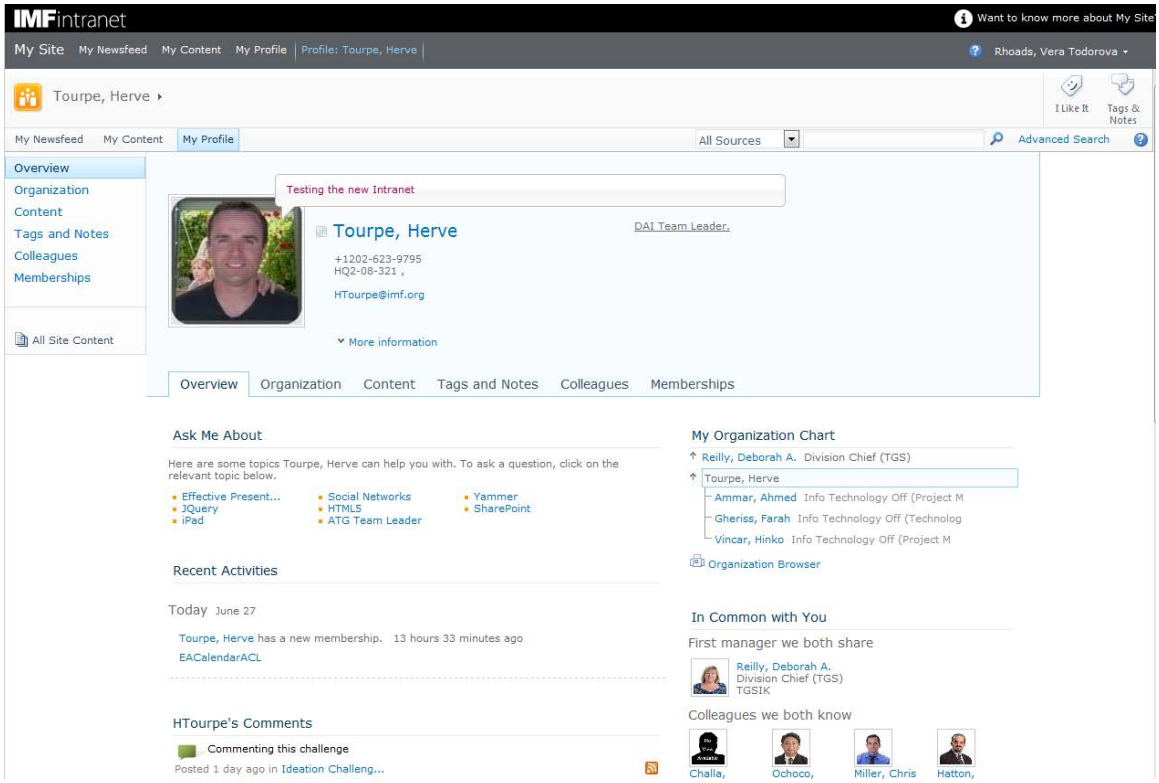
"We know that no enterprise search engine is a 'set-it-and-forget-it' tool," says Sonia Dwyer, Enterprise Information Architect. "They all need to be configured to match the content being searched in the organization."

To address these required configurations, Dwyer explains the customizations the IMF team has made to FAST:

- **Search scopes:** Enterprise search guides users to different content sources through the following defined scopes, which are presented as filters above the search box on all intranet pages:
    - *All Sources* searches across all content sources below
    - *Intranet* searches on intranet content
    - *IMF.org* searches on IMF public site
    - *People* searches on SharePoint My Sites
    - *KE Documents* searches on Knowledge Exchange Documents (a collection of selected country reports, research papers and IMF publications)
- **Content sources and prioritization:** "Content sources are treated and weighed equally by the search engine," says Dwyer, adding that the search engine does not prioritize content sources differently. Role-based, or "user-context," search is planned for the next year.
- **Crawl rules:** "We have in total about 42 different rules for content inclusion and exclusion to make searches more accurate and exclude 'noise' from SharePoint items," Dwyer says. "Crawl rules are updated as needed."
- **Custom metadata / managed properties:** "We have in total about 62 configured SharePoint managed properties for all content sources to improve search results and content retrieval," Dwyer says. "Managed properties are also used for *Advanced Search* to ensure that users are searching IMF metadata fields for very specific searches. Every time a new content source is added, we need to map the crawled properties to managed properties."
- **Relevance tuning:** "FAST Search Server 2010 for SharePoint provides flexibility for tuning relevance in several ways," she says. "Relevance is not absolute and perceived relevance differs greatly among users. As part of the longer term intranet renewal, we are in the process of centralizing and elevating key information on the intranet in parallel with efforts to 'upskill' staff on content management best practices."



An example search results page shows recent enhancements as part of the intranet redesign, including filters, best bets, and search tips.



IMF *My Sites* provide information on expertise/skills and interests as well as great opportunities for social networking connecting people to people. *My Sites* are a personal website that gives each staff member his or her own central location to store, manage, and share work-related information. *My Sites* are fully searchable to exploit the tool's powerful networking potential.

RESULTS AND ROI

Sometimes the easiest way to gauge a redesign's success is to listen to the feedback. The IMF team received some glowing reviews from its users after the initial launch. Here are a few examples:

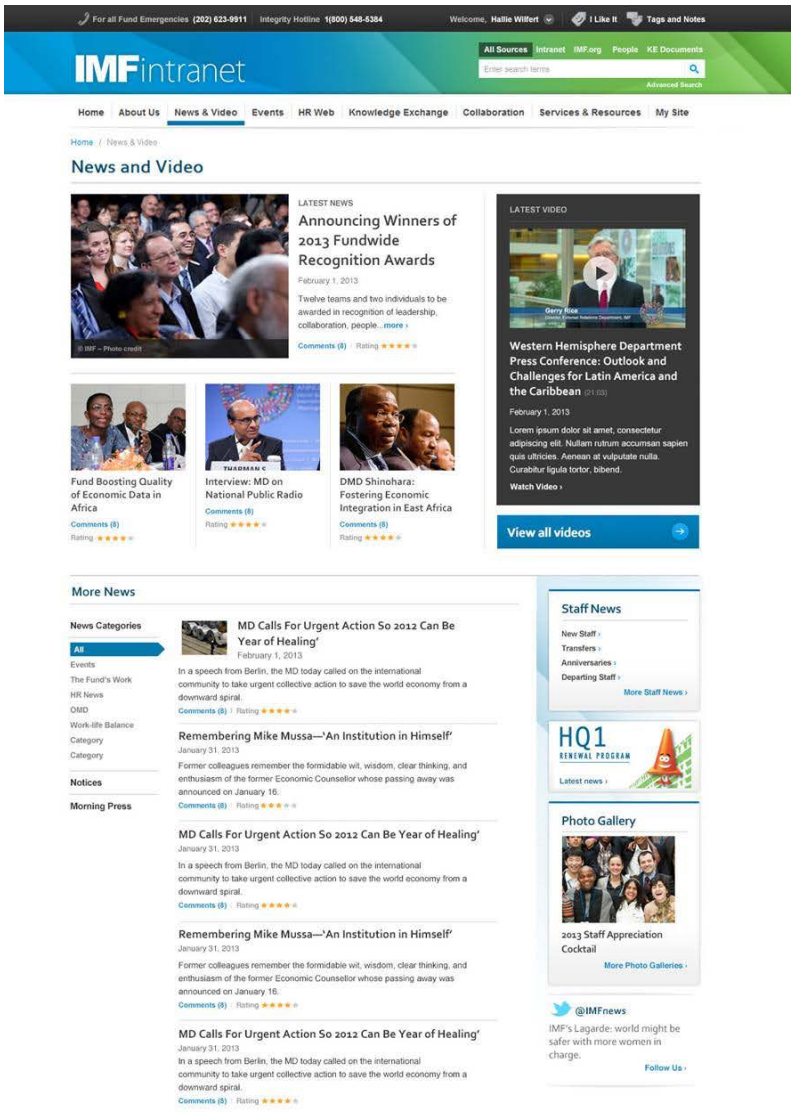
> *"Thank you for the much simplified layout. Easy on the eyes and the mind."*
>
> *"I really like the fact that I can now personalize the quick links on the homepage. I didn't use them before as they were buried at the bottom of the page and cluttered with links that were irrelevant to me. This is a great improvement!"*
>
> *"I like the new format. It is sleek and modern looking and has a lot more information available through the menus. Well done!"*

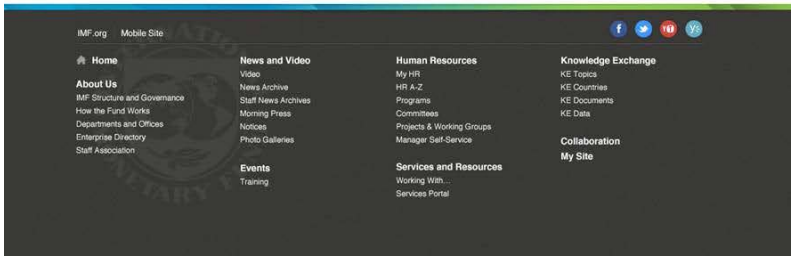
"To be fair," says Nuñez, "We also received complaints from people who couldn't find certain links and features in the beginning, but we actually expected that. We knew it would take people some time to get their bearings in the new intranet. We even went ahead and made some minor tweaks to some links to address some recurring complaints received in the first few days."

Users are not only happy with the new design; they're using the site more often and engaging with its features. New story readership has increased (as measured by unique visitors and page visits) since the launch, but—more importantly—actual engagement has increased significantly. "By engagement, we mean the amount of

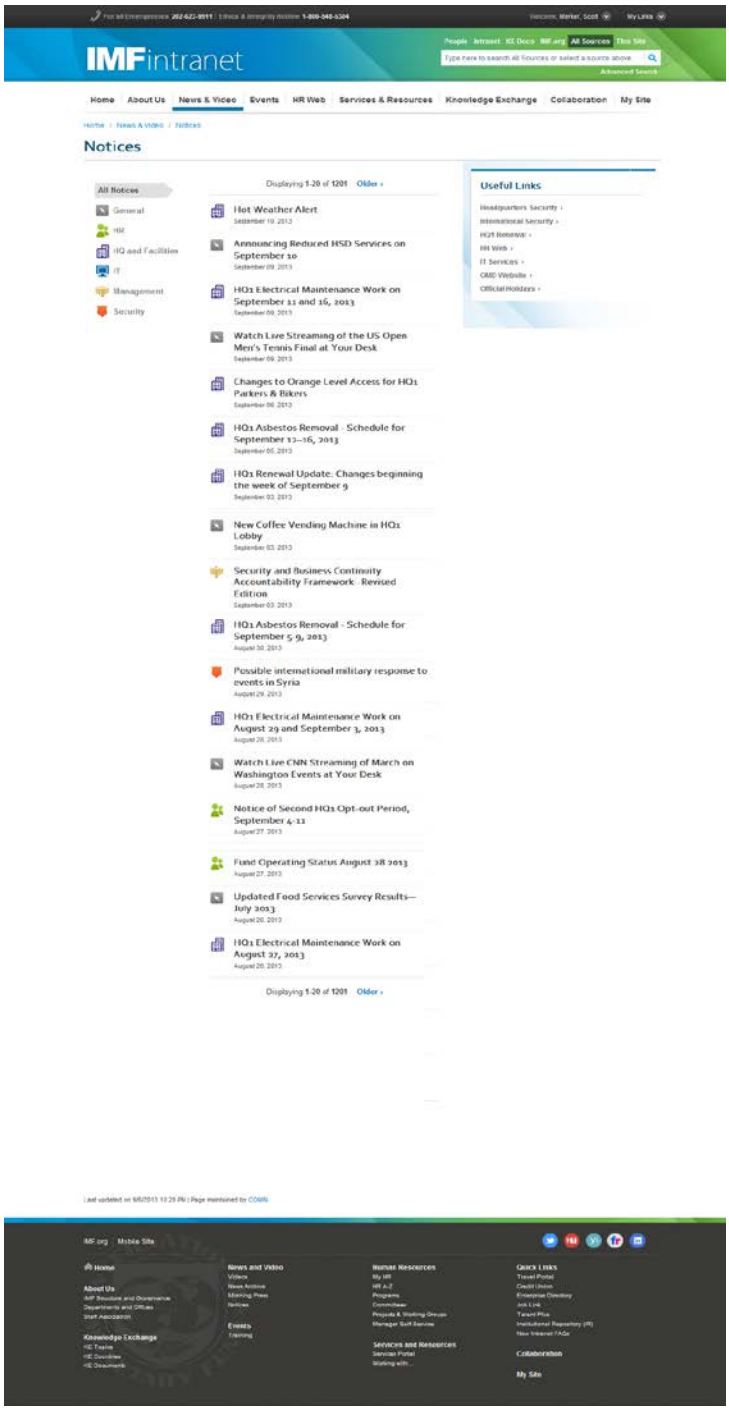
staff participation in the comments and ratings features on our stories," says Nuñez. "Our stories used to receive barely a handful of comments (on average, although it varied by topic). Since the launch, participation in our stories has more than doubled. We think this is partially a result of the improved presentation of news stories in the new, dynamic *News Rotator*, as well as the prominent display of the comments feature in the *News Rotator* and the *News and Video* page."

Engagement with and use of search has also increased with the new design.





The newly created *News and Video* page highlights all the improvements made to the news delivered at the IMF. It features a much-improved interface to showcase videos, with better organization in more detailed and intuitive categories to facilitate users finding the right information at the right time.



The updated *Notices* page is accessible from the *Notices* webpart on the homepage. The old pages were simply a list of notices sorted chronologically. On the page's new version, the team added a filter to sort notices by category and displayed a visual category icon next to each notice, similar to the *Notices* webpart on the homepage. The new page is clean and clearly readable, and it offers a visual cue (icons) to indicate the notice type (*Security*, *IT*, *HR*, *Management*, *HQ & Facilities*, or *General*).

LESSONS LEARNED

The IMF team shares some lessons learned:

- **The designers must understand the constraints of the technology.** "Make sure that whoever designs your new intranet has deep knowledge and expertise of the platform on which the new intranet will be implemented (SharePoint, in our case). There were a few details and features in our designs that could not be technically implemented, and we had to do some adjustments. Ideally, this should not happen." (Faurès)
- **Transition users with care.** "Plan for change management, not just communication, to inform users about the new design. Old habits die hard, and when people are used to finding things a certain way (even if the methods are old-fashioned or clunky), abrupt changes are never accepted easily. Beyond informing users of the new design and providing a cursory view of what would be new, I think we could have taken a more in-depth approach at mapping out how to use the new features and anticipating questions or concerns. We wouldn't redesign the building without providing a map before people arrived on the first day; we should treat our virtual space the same way." (Dwyer)
- **Give the team time to do what they need to do.** "One lesson I learned from this exercise was to always allow more time than you anticipate at each step in the process. Don't try to cut corners by 'tightening' the time dedicated to any activity. We were so eager to complete this project that we often gave ourselves pretty harsh deadlines. A number of people involved in this project had other projects or jobs to deal with, and there were times when meeting those deadlines was a big challenge. The work always got done in the end and it was all worth it, but there were moments of tension and a lot of extra hours!" (Nuñez)
- **Communicate early and often—with stakeholders.** "Make sure that stakeholders are consulted often and thoroughly. This project touched so many different groups and aspects of the intranet that it was hard to keep everyone on board and aware of all the changes that were proposed, designed, tested, and finally implemented. After the launch—despite all our best efforts to communicate with everyone prior to this date—there were still a few people who were surprised at some of the changes to their areas. As a result, some small tweaks had to be made later in the game, even after the new intranet had been launched." (Nuñez)

- **Communicate early and often—with users.** "My advice would be to invest in a strong communications campaign to keep users of the intranet informed. Nothing goes down worse with staff than changes to their daily routine (the intranet being a big part of it) catching them by surprise. In that respect, we feel our project was quite successful. Along the way, we kept staff in the loop by posting news stories about the objectives and timing of the revamp, doing presentations of the new design months before it was launched, sharing the look of the future intranet online and at an information symposium, and launching a big pre-launch campaign two weeks prior to going live (including a news story, posters and desk-to-desk flyers, a video highlighting the main changes and features, and an preview tool that allowed people to explore the new intranet prior to using it). There was virtually no way you could work at the Fund and not know that the intranet was going to be upgraded!" (Nuñez)
- **Court stakeholders with care.** "Management's support is crucial. IMF senior staff, including the CIO and deputy director of COM, were strong advocates for the program and actively participated in the communication campaign." (Faurès)
- **Test with users.** "Make sure to do usability testing to validate your assumptions. In our case, users were confused with the search control and the new *Where can I find?* tool. We changed the labeling accordingly. We also got feedback that some content that we removed from the homepage was actually very important, and we had to put it back." (Faurès)

  "Despite all the analysis, testing, and pre-launch communication you will do, be ready to answer questions such as: 'Where did my content go?' We got a lot of them, and had to quickly prepare a Q&A to address all those questions after the launch." (Faurès)
- **Stand behind your work.** "Be prepared to stand by the new design, realizing that any change is difficult for people to accept. Avoid the temptation to drift back to the old design or way of doing things just because some people make a fuss about having to re-adapt. Be armed with valid reasons for each change when put under pressure by 'squeaky wheels.'" (Dwyer)
- **Establish ongoing governance.** "No matter how good your new intranet is on day one, you will immediately be under a lot of pressure from various content owners to modify the design and user experience in order to accommodate their needs. In that context, the gains from an intranet redesign can vanish very quickly, which is why the IMF felt that it was very important to establish a governance structure. The Intranet Council must vet any change to the main pages of the intranet. In addition, departmental webmasters are required to follow the intranet standards to ensure a unified look-and-feel, a consistent user experience across the intranet, and optimal information findability." (Faurès)

UniCredit S.p.A.

Using the intranet: UniCredit is a leading European commercial bank with an international network spanning 50 markets, with over 8,700 branches and more than 149,000 employees and commercial operations in over 17 countries. UniCredit benefits from a strong European identity, extensive international presence, and a broad customer base. Its strategic position in Western and Eastern Europe gives the group one of the region's biggest market shares.

Number of employees the intranet supports: Approximately 130,000 employees

Headquarters: Milan, Italy

Locations where users use the intranet: Western Europe: Italy, Germany and Austria; Central and Eastern Europe: Poland, Azerbaijan, Bosnia Herzegovina, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Romania, Russia, Serbia, Slovakia, Slovenia, Turkey and Ukraine.

Key financial data: Revenues: €24.0 billion; Cost/income ratio: 61.7%; Gross operating profit: €9.2 billion

Project management and design team: The Group intranet project was led by the UniCredit Group Internal Communications unit, and more specifically, its Digital Internal Communications team in close collaboration with the consultancy of Assist S.p.A.

In-house: Letizia Chlapoutakis, Digital Internal Communications expert; Fabio Delton, Head of Digital Internal Communications; Luca di Bari, Digital Internal Communications expert; Elisabeth Fazekas, Digital Internal Communications expert; Svetlana Krastanova, Digital Internal Communications expert; Patrizio Regis, Head of Group Internal Communications; Linda Russo, Digital Internal Communications expert. Also, members of the Group Internal Communications Unit and its teams (Business Internal Communications, Corporate Internal Communications, Country Chairman Italy Internal Communications)

UniCredit Business Integrated Solutions: Simone Malvassori, Project Manager and Application Analyst; Paolo Marchini, Head of Intranet & Tools; Marcella Mariani, Head of UBIS Identity & Communications; Pierluigi Rossi, Head of Intranet & Physical Channels; Tomasz Wenelski, Head of Competence Center, and the Lodz branch; Cristiano Secci, External Consultant from Avanade

Assist: Francesca Gabrielli, Digital Experience Managing Director; Luca Petroni, User Experience Director; Joachim Hiorth, Sr. Project Manager; Alberto Cremonesi, User Experience Manager; Alberto Angeli, Sr. Visual Designer; Clara Corradi, User Experience Analyst; Cinzia Cappi, User Experience Analyst

SUMMARY

UniCredit S.p.A.[1] is a leading European commercial bank with a world-class intranet, called OneGate Group Intranet. Before discussing the merits of UniCredit's intranet, it is worth briefly describing the intranet team's extraordinary efforts to integrate UX processes, involve teams from around the organization and the globe, and get buy in for the intranet design effort. For three years, more than 40 stakeholders from different departments and business entities worked directly with the core intranet team on the new design. They participated in multiple international workshops and research activities — needs assessment, exploration of how employees work, card sorts with stakeholders (different from end users) to explore IA ideas, UX research planning, UX research, and design reviews.

The core team deemed all these efforts valuable because of the wide variety of needs the new intranet needed to accommodate given the company's logistics: more than 130,000 employees, an international network spanning 50 markets, and more than 7,900 bank branches. Thus country, language, market, branch, management, and individual employee jobs all influence the intranet's user requirements.

1 S.p.A.: A public limited company (legally abbreviated to PLC in the U.S.) where shares are freely sold and traded to the public. In Italian "public limited company" translates to "società per azioni," abbreviated to S.p.A."

An unusual quality in the UniCredit intranet team's process is that 10% – 15% of the new intranet effort's budget was spent on UX-related research and iterative design. By the end of the project more than 3,500 employees had been involved in some type of user feedback or testing, with the design team listening diligently to employees, ensuring that many teams felt included and contributed to the design and testing.

This effort and commitment to their vision paid off and resulted in higher employee productivity and engagement. The following are some improvements measured via analytics after one year with the OneGate Group Intranet design compared with the former intranet:

- Percentage of daily visitors increased by 50%
- Bounce rate decreased by 53%
- Page views increased by 95%

In addition to analytics evidence, consider data from quantitative behavioral usability tests, where researchers observed employees in real time as they worked with the intranet:

- Time needed for employees to find and retrieve content is much faster, a 67% decrease thanks to the new design's advanced search capabilities.
- On the backend, content platforms are easier to manage, with the average time needed to publish content decreased by 65%.
- Employees expressed a 41% increase in overall satisfaction with the intranet.

Turning attention toward the design details that make the intranet exceptional. It begins on the homepage, which acts as a hub for all of the organization's digital channels that deal with corporate information. To make communication manageable with such a wide array of information, the content is addressed to the individual employees based on their roles, including:

- Business
- Division
- Country
- Language
- Other factors

As a necessary escape hatch out of the role-based lens, search and direct links enable employees to access information on sections of the intranet outside their targeted role. A further personalization option allows employees to use the intranet in any of the seven languages available: English, Italian, Polish, German, Russian, Czech, and Slovak. The language is easily changed via the menu in the far upper right of the page. These types of choices make it possible for employees to feel comfortable and productive as they use the intranet.

The homepage is divided into two columns: prioritized items in the left and operational features in the right. The *Top Stories* items appear at the top of the left column. These are visible highlights of news and important information from any internal sections. Each item is accompanied by an abstract and an image. The news

and multimedia highlights appear below this, in two bands. These blocks include a more exhaustive list of stories from the *News and Events* section.

In the right column, the topmost spot is dedicated to a chart that displays the stock price in real time. Aside from news, search, and weather, the stock price status tool was one of the very first content sections we saw many years ago on pioneering intranets. But for a long time they stopped appearing on homepages, usually due to demotivating factors related to dropping stock prices, and arguments about homepage real estate. We welcome the resurrection of these tools as economies and stock prices bounce back.

This stock chart feature is not just for the employees who are stockholders. Knowing how the business is doing in a financial context is informative and motivating for all employees. For UniCredit in particular, this is important given the industry they deal in. And while employees can find the stock price easily via other sources, it's a simple nicety for them to be able to scan it right when they log in to the intranet.

Below the stock price chart are links to tools users need to do their everyday work. *Default Tools* include a set that all users see, but the individual employee selects the tools in the *My Tools* section. Employees may access and edit tools via the *Go to My Tools* link in the tools section, or via the *Tools & Utilities* global navigation tab.

Further down the homepage are a few of the latest posts from the organization's social channel, OneNet.

The *Extras* section at the bottom of the right column offers additional elements — internet banking, canteen menu, and podcasts — that employees may choose to show on their homepage. The *Add widget to Extras* link in the upper right of that section displays more choices for the employee to pick from.



Image 1. UniCredit Intranet: Homepage. UniCredit's OneGate Group Intranet homepage offers personalized and prioritized news and other updates, plus customizable sections. *123_UniCredit_Group_Intranet_01_Home_live.png*

Content on the page changes depending on the logged in user's role. Consider an example for employees working in UBIS, a subsidiary of UniCredit. In this scenario, these are some changes that occur in the UI:

- More links are offered in the header, the topmost bar on the page.
- *Business Integrated Solutions* appears in the banner to help differentiate the site.
- "Micro Apps" icons (e.g., phonebook, help, and calculator) appear in the upper right, just below the search feature.

- Top stories and news in the left column include targeted content that is visible only by UBIS employees.
- Tools in the right column are targeted to UBIS employees.



Image 2. UniCredit Intranet: Homepage Role-Based Personalization. Content on the intranet changes depending on the logged in user's role. This page reflects what an employee of UniCredit Business Integrated Solutions would see. Differences between this and the previous figure include more links offered in the header, presence of *Business Integrated* Solutions in the banner, and "Micro Apps" icons below the search feature targeted news and tools. *124_UniCredit_Group_Intranet_02_Home_UBIS_live.png*

The *Target by Choice* option allows employees to choose the type of additional target content they would like to see. They access this command from the drop-down menu by clicking on the user's name on the top bar. A light box focuses the user's attention on the pop-up, which gives the options CIB (Corporate Investment Banking), CEE (Central and East Europe), or *No thanks* should the user decide to bail on the action.

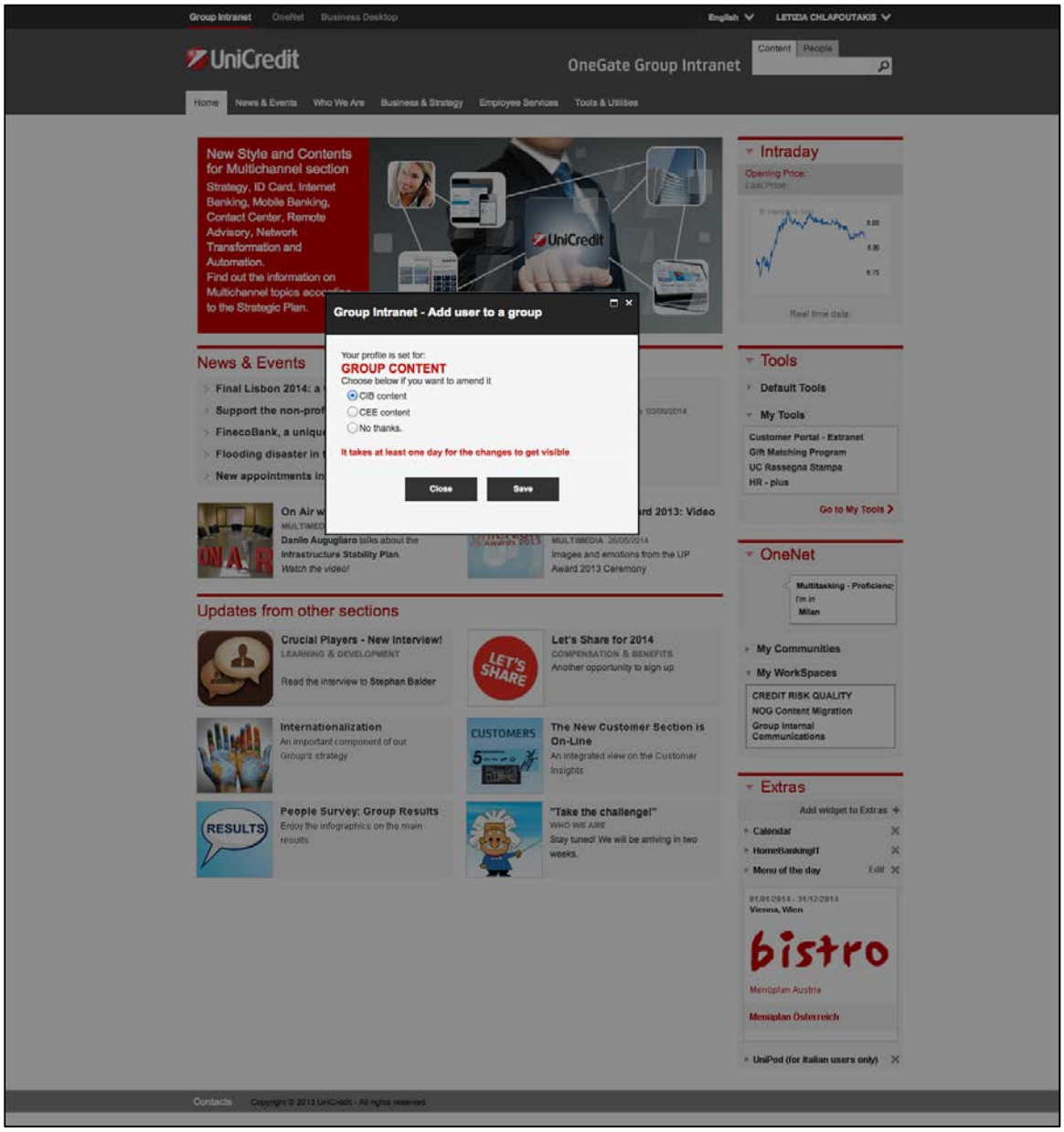


Image 3. UniCredit Intranet: Content Options. UniCredit intranet users may target which additional content they would like to see. The additional targets currently available are Corporate Investment Banking and Central and East Europe. *125_UniCredit_Group_Intranet_03_targetbychoice_live.png*

Tools are easily edited from the homepage. Employees select the *Tools & Utilities* tab in the global navigation, then *Tools & Applications* option from the secondary

navigation, and finally *My Tools* from right under it. The text explains how the customization works for adding tools, changing the order of tools, and designating which six tools will appear in the section on the homepage.

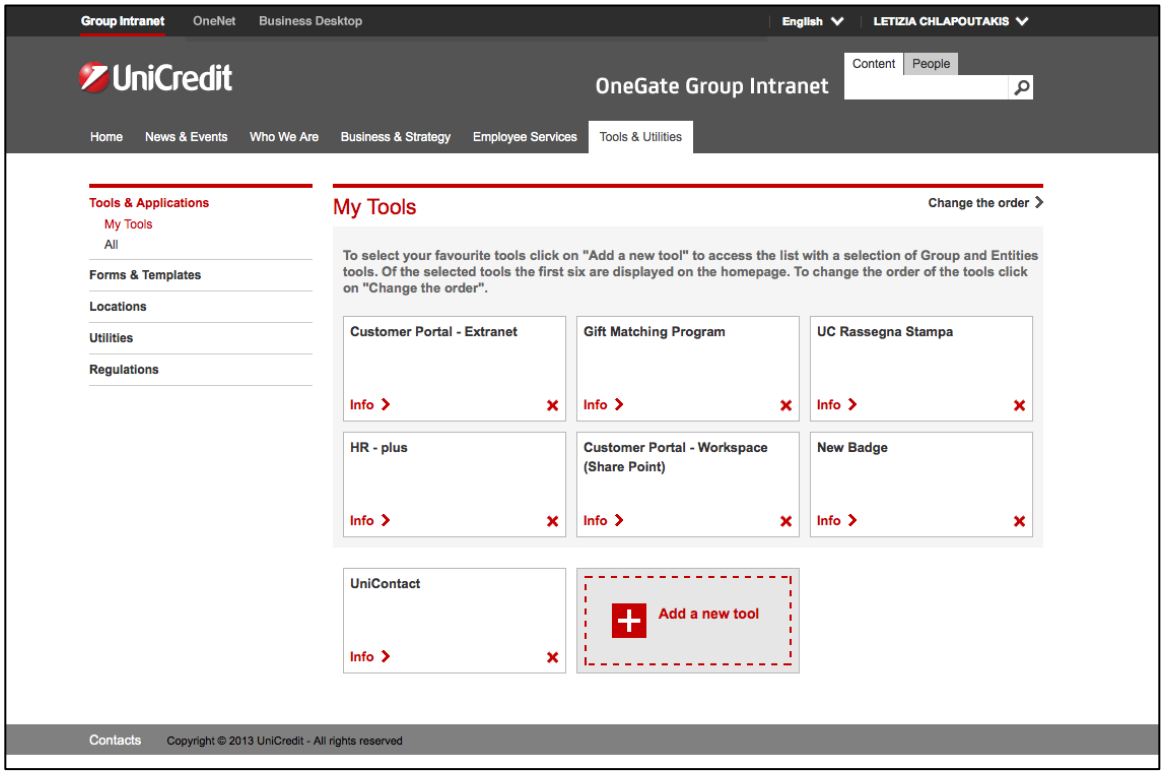


Image 4. UniCredit Intranet: Tools. Employees may edit their set of tools, and choose which will appear as part of the set on the UniCredit intranet homepage. 126_*UniCredit_Group_Intranet_04_My_Tools_live.png*

The Group Internal Communications teams played a guiding role in driving the new intranet design, so it is no surprise there is an expansive, well-populated *News & Events* section. This design assists employees in scanning through the content quickly, and discovering related information.

The local navigation on the left side helps users view information by type of content, such as *News, Events, Press, Newspapers & Magazines,* and *Multimedia.*

The news story itself leads with an understandable heading that appears at the very top of the content area. The large text appears stronger than the body text, but it's not overly large. The darker grey color and bold font help identify the title.

The source is acknowledged below the title, along with the publish date. Sub-headings and links are called out in the UniCredt brand red, which is visible and legible for this use (small amounts of text).

The text column is narrow and peppered with relevant images, making it easy to read online.

Links in the *Related News* section on the right are automatically generated based on the author's topic (keyword) selections.

The *Video* and *Photo* sections below the article offer content the editors choose manually.

The *TOPICS* section at the bottom of the page lists related keywords, which aid the site's advanced search capabilities.

At the end of the page, social features such as emailing, sharing, and star rating help employees curate content for one another, find interesting or needed content, and make better selections about which content to spend time consuming.



Image 5. UniCredit Intranet: Content Page. Content pages on the UniCredit intranet make information easy to scan, and suggest additional highly related content. *127_UniCredit_Group_Intranet_05_News_live.png*

Traversing the vast amounts of content on the intranet is possible via menus or via the search in the upper right of pages. The open white field pops out on the dark grey background. The search magnifying glass icon is well-placed and easy to spot. The tabs make it possible to search for content or employees.

The navigation is based on research, usability testing, content mapping, and the daily needs of employees. The local navigation on the left side of pages gives a sense of the comprehensive information available on the intranet. The fairly deep IA is accessible because of the following visual elements:

- The text at the highest level stands out from lower-level items due to its heavier, bold weight and darker gray color.
- The selected sections are red, as opposed to dark grey.
- The hierarchy is identified with deep visual indents delineating children and siblings.
- The navigation sections expand in place.

Various groups, teams, and departments have their own pages or sections on the intranet. Details such as the *Value Proposition* describe core principles for the department, while sections like *What we stand for, What we do,* and *How we drive change* help employees learn from one another and use resources at the organization effectively.

The intranet's IA is based on user needs, not organizational structure, and user testing, card sorting, and expert reviews helped to establish the architecture.

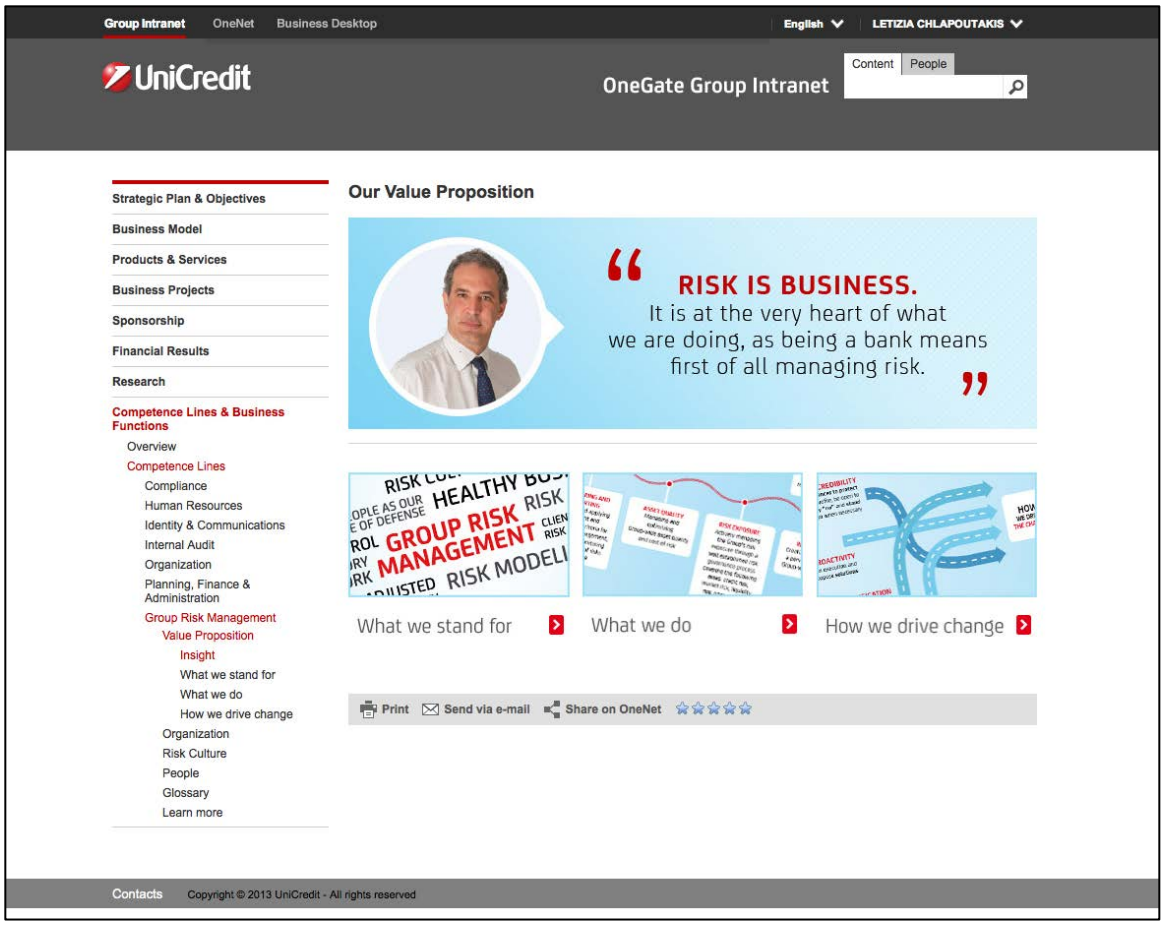


Image 6. UniCredit Intranet: Local Navigation. Local navigation on UniCredit's intranet is easy to follow because of visual cues such as bolding, color, and indenting. Team pages include links to information about their mission and tasks, among other things. *128_UniCredit_Group_Intranet_06_Group Risk Management-Competence Line_live.png*

UniCredit's large and intricate structure made it impossible to integrate all internal websites into a single intranet, yet. But the new design is flexible and scalable, and allows for country-by-country adoption. New business entities progressively join the platform, integrating their local content so it's searchable and accessible via OneGate's menus. Until such migrations occur, the intranet team created the "NewsBreaker" feature, for those local portals that are not yet fully integrated in the Group intranet. *Visit OneGate Group Intranet* appears in the upper right of these pages. This functions as an advertisement for the intranet, and links to it.



Image 7. UniCredit Intranet: NewsBreaker Feature. The link, *Visit OneGate Group Intranet*, appears in the upper right of pages of local portals that are not yet fully integrated into the Group intranet. This link functions as an advertisement and goes to the main intranet.
129_UniCredit_Group_Intranet_07_NewsBreaker_live.png

The intranet design not only makes it easy to locate content, but makes it easy to locate people and expertise too. With abundant capabilities at UniCredit, finding the right person can make all the difference to a project. Employees may refine their search results by filter terms like *Unit, Company,* and *Country.* The results section displays the following information:

- Name of the employee
- Photo
- Email address
- Company
- Unit
- Office location
- Phone number and mobile phone
- A link to the organization chart in the context of the employee

The *View More* link opens a profile document for the person with information about projects and affinities. Below the photo of the employee is a link to his personal page on the internal social networking platform, OneNet. This is true for employees who have already received an invitation to the UniCredit platform for e-collaboration and social networking. OneNet will gradually be made available to all UniCredit Group colleagues.

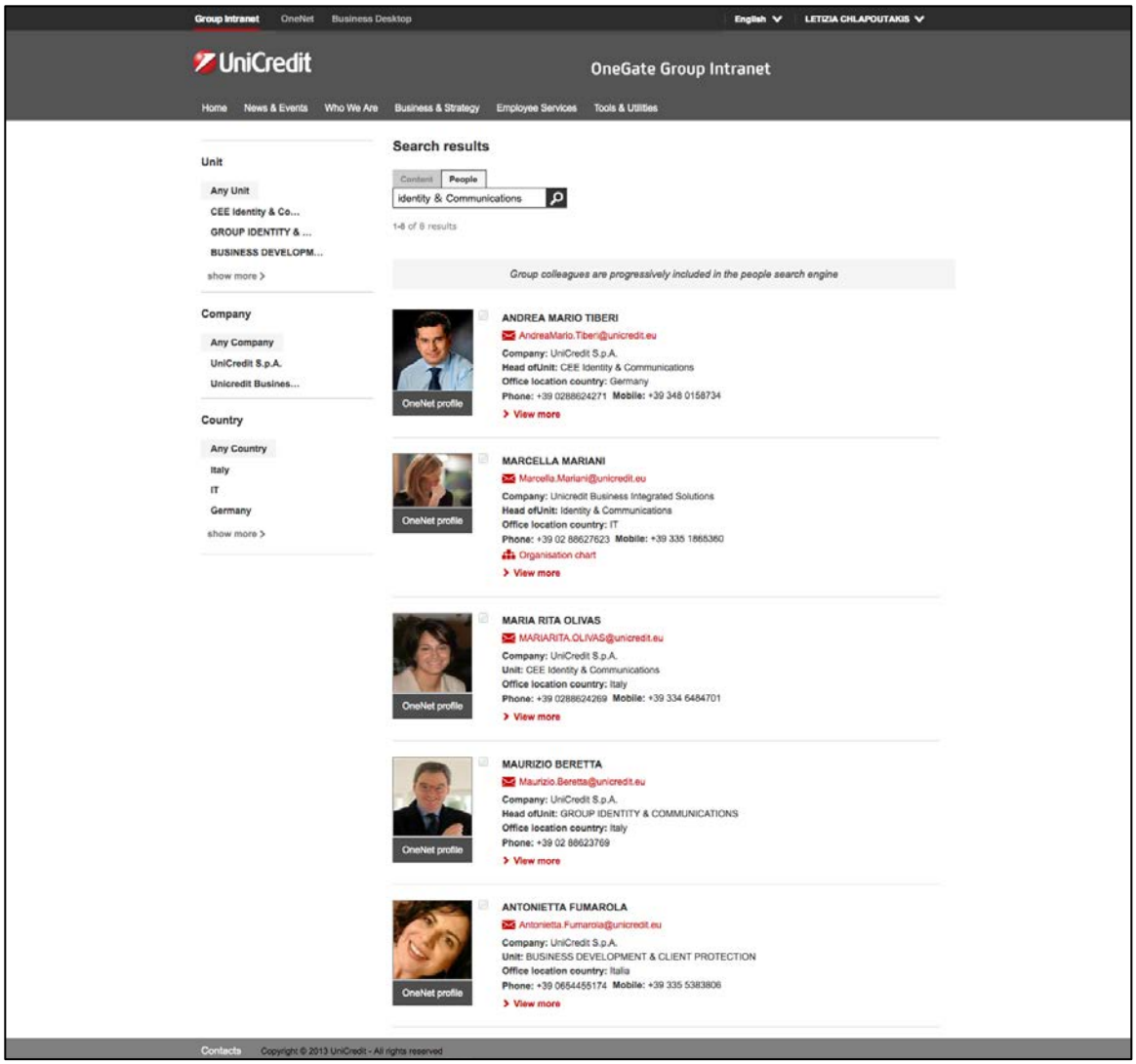


Image 8. UniCredit Intranet: Employee Search. Employee search results offer so much information about people that opening their full profile pages may not even be necessary. *130_UniCredit_Group_Intranet_08_People Results_live.png*

The UniCredit team's aggressive goals to create a single, digital platform and provide a seamless user experience were achieved tenfold. The flexible framework, current information, enhanced editorial formats, and role-based content targeting are all thorny challenges that most intranet design teams wouldn't even attempt. But this team did, and employees are happier and more productive as a result.

BACKGROUND

Beginning in 2005, a series of international integrations radically changed UniCredit. Out of this change emerged a strong need to establish a new corporate culture.

Until then, colleagues had one or more local intranet sites where they could access information on their local bank's strategy but the organization wanted colleagues to be able to see the bigger picture in their day-to-day work.

“For example,” says Patrizio Regis, Head of Group Internal Communications, “when colleagues are offering financial advice to a customer, they could be helped in tasks if they understand how those tasks fit into the bank’s strategic plans.”

“It was thought that a common intranet platform for all colleagues of the banking group could be an important catalyst for a new corporate culture,” he says, “reflecting the structure of the whole banking group and not a conglomeration of different banks. This is why we, as Group Internal Communications, deemed it important to propose and support the project.”

The organization wanted bank employees to rely on a single unique destination so they could get to both Group-wide and local information. The objective being that employees could see they were all part of the same strategy, of the same banking group. The organization also wanted to create something really useful for its employees, something based on their real needs.

Goals

The team began its design initiative by outlining the following goals for the project:

- Provide all employees with access to Group information
- Make the OneGate Group Intranet the main source of corporate information by providing information when it happens, using enhanced editorial formats and modern storytelling techniques, and acknowledging that the company’s internal site is in direct competition with the internet and other external sources competing for user attention
- Design a channel that can help to make it possible for editors to communicate in an effective and synchronized manner
- Create a single digital internal platform to provide a seamless user experience
- Define a scalable concept framework that will meet the needs of the countries that will join; local platforms should integrate their content into this single platform
- Design a homepage as a hub that unified all internal digital channels
- Provide users with interesting content, avoiding information overload through the use of content targeting, based on an individual’s profile data
- Provide a user experience with cutting-edge features by making the interaction as intuitive as on the web
- Rationalize and create synergies in the ecosystem of the internal digital channels and editorial strategies by providing a strong governance framework

After the first cycle of user tests and meetings with other stakeholders, the macro requirements were translated into eight declarations that would comprise the pillars of the OneGate Group Intranet concept:

- **Homepage as entry point:** provide direct and seamless access to content that is central to the day-to-day tasks of users.
- **Information architecture:** Create a common IA that is useful for all employees, across all entities.

- **Targeting:** Provide users with relevant information and avoid information overload.
- **Enhanced editorial formats:** Apply enhanced editorial formats and modern storytelling techniques.
- **Multilingual:** Provide content in the main local languages of the banking group (the seven as of this writing are English, German, Italian, Polish, Russian, Czech, and Slovak).
- **Social features:** Provide close connection and integration with OneNet, the company's social network and eCollaboration platform. Creating these connections allows colleagues to easily interact with content (via rating, comments, and sharing) and to quickly browse user profiles and collaborative areas.
- **Personalization:** Enable users to add content and functionality that are of particular interest or use.
- **Search function:** Provide a powerful search function that encompasses both content and people.

The team knew that the stakes were high to create a great intranet that was engaging, not just informational. “A modern intranet has to compete with the internet in all aspects,” says Fabio Delton, Head of Digital Internal Communications. “It is no longer good enough to merely provide information.”

“It is for this reason,” he says “that we made a significant effort to provide user experience similar to that of the internet by creating an environment with intuitive interaction, innovative editorial formats, and cutting-edge features such as complete freedom and high level of personalization.”

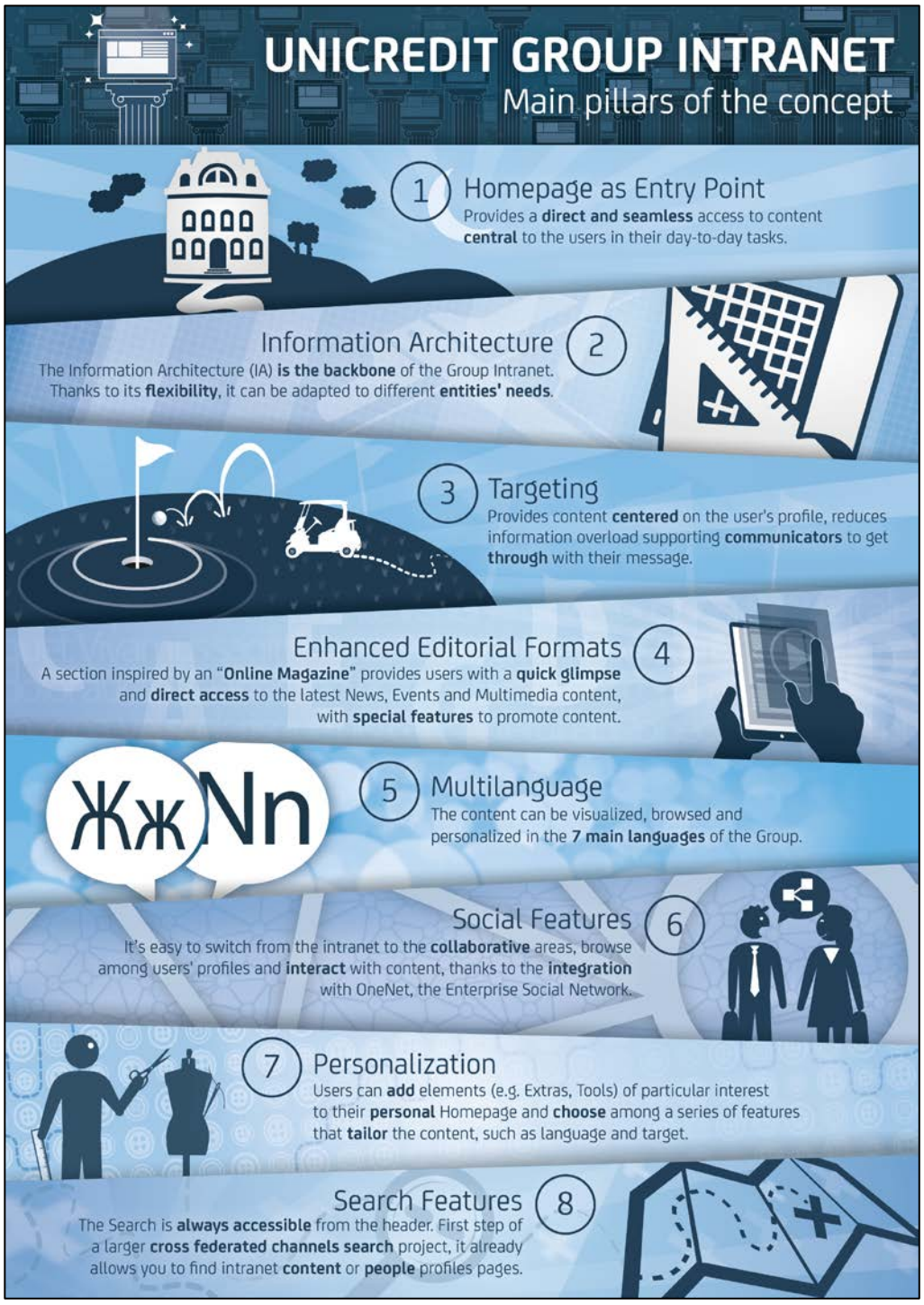


Image 9. UniCredit Intranet: Defining a Baseline for Success. Through a series of workshops with over 40 departmental stakeholders, the baseline for the project was defined. The result was an outline of eight intranet pillars for development, as shown in the infographic above.
131_UniCredit_Group_Intranet_09_Pillars_infographic.png

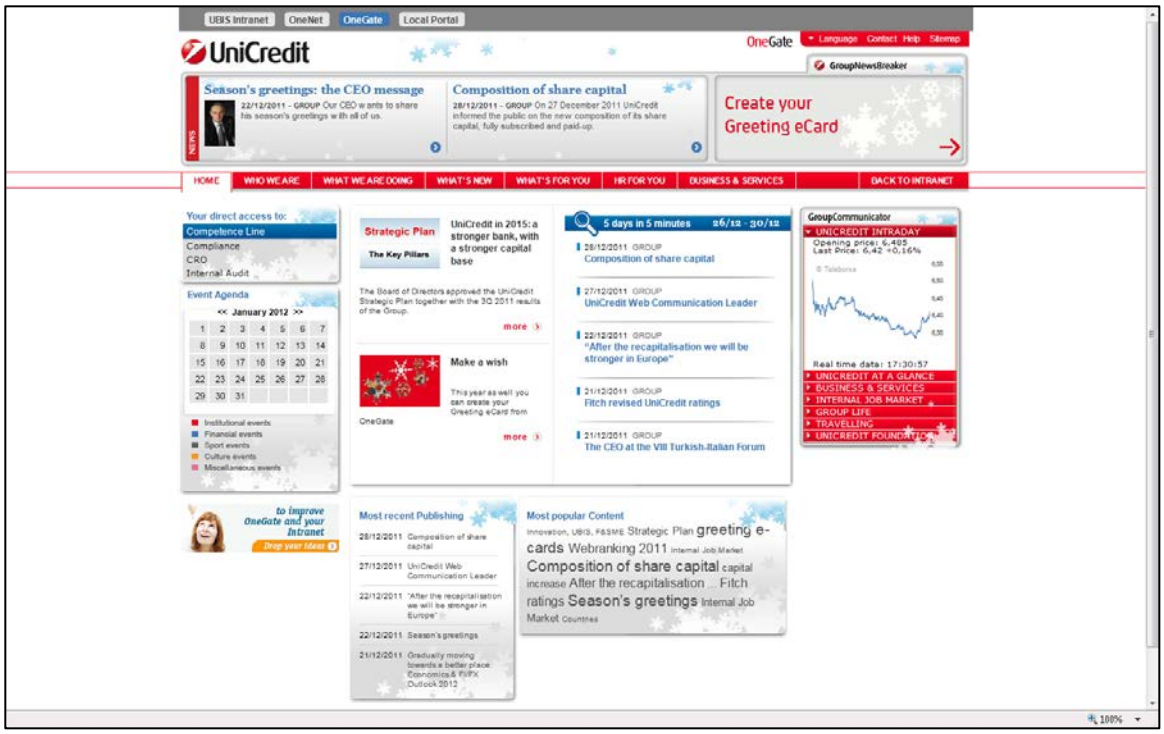


Image 10. UniCredit Intranet: Prior to the Redesign: The old UniCredit intranet. *132_UniCredit_Group_Intranet_10_OneGate_version1.png*

INTRANET TEAM



OneGate Group Intranet Core Project Team (members from the Digital Internal Communications team and from Assist, standing, left to right): Alberto Angeli (Assist); Francesca Gabrielli (Assist), Luca di Bari (Digital Internal Communications) and Joachim Hiorth (Assist); (sitting, left to right) Letizia Chlapoutakis (Digital Internal Communications), Clara Corradi (Assist), Patrizio Regis (Head of Group Internal Communications), and Fabio Delton (Head of Digital Internal Communications). The wall in the background features photos of team members who are part of the larger project team.

GOVERNANCE

Ownership

The team in charge of the intranet is part of Group Internal Communications. Besides being responsible for governance of this specific intranet, the Group Internal Communications is also accountable for defining and coordinating the Group internal communications strategy and global editorial planning. This ensures consistency of the organization's main messages across the banking group's many internal channels. Placing ownership of the project with Group Internal Communications was important to meet project goals.

Group Internal Communications puts together an editorial plan that is shared with the local and Group editorial teams on a regular basis.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Digital Internal Communications (team within the Group Internal Communications unit)	• Define the framework of the different internal digital channels and services they offer • Control the company's main communication channels (Group Intranet and OneNet — the internal social network) • Set guidelines and ensure adherence • Ensure coherence in the design and UX of every single communication channel • Analyze the needs of users and editors and lead the development of new features for the intranet • Support and advocate the choices of editors for special publishing solutions (architectural and interactive) • Provide regular training for editors
Editors	• Publish in one or more sections of the intranet
Target Owners	• Publish content targeted to their communities (consists of the communication teams of some communities within the group that have specific communication needs; e.g., a legal entity, a business division, or a cross-country entity)
Editorial teams within the Group Internal Communications unit (Business Internal Communications, Corporate Internal Communications and Country Chairman Italy Internal Communications)	• Editors-in-Chief within Corporate Internal Communications oversee the editorial workflow and manage the editorial plan. • Provide communication and editorial consultancy for all the content owners of the intranet that may need to publish content. (Each person in this role acts as account manager and/or focal point for the content owners.) • Perform editorial work, as needed, and coordinate strategic projects and support internal customers with communication activities.
Editorial teams of local entities	• Responsible for the communication strategy and content within the target (Target Owners) • Can publish content addressed to their population (company, country, or division)
Content owners	• Responsible for updating their sections and ensuring consistency. (They are not necessarily part of a communications team, but they are experts in specific areas.)

External User Experience Experts	• Contribute to the design of interactive solutions that meet a specific need and work in cooperation with Digital Internal Communications to: o Support functional analysis (for example by providing wireframes to let the technical team develop) o Support Digital Internal Communications in designing and submitting user tests
External rich format editor experts	• Cooperate (on demand) with the editorial teams to realize special formats that are outside of what the standard CMS templates can offer
Technical Experts	• Team(s) of analysts, developers and other IT specialists that manage technological issues relating to the Group Intranet, and also: o Analyze change requests related to the evolution, enhancement and improvement of the channels. o Provide technical support for non-standard requests or requests that cannot be managed through an editorial solution but need implementation.
Translators	• Proof read and translate the content that has to be published

Figure 1. UniCredit Intranet Team Responsibilities

USERS

The OneGate Group Intranet is designed to be the main source of strategic information from the Group and its local entities and a resource for all employees. For obvious reasons, when providing information to approximately 130,000 employees from 50 different markets, located in many different countries, the design team had to ensure that employees had quick access to information relevant to their profile. “To avoid the classical scenario of information overload, which both communicators and users considered a problem, we set up a targeting mechanism based on the user's company code,” says Letizia Chlapoutakis, Digital Internal Communications.

Recognized users of the system can see Group content as well as content from their company or entity. In cases where users are not included automatically in their target of interest, they can set the target autonomously. They call this feature “target by choice.”

The targeting mechanism is in place to help users but not to hide information from them. Therefore, 98% of the information is accessible to colleagues by direct link or through the search engine.

So far it has not yet been possible to recognize all users due to technical limitations or legal constraints so for these anonymous users the team has created a mirror site where they can access content from the whole Group.

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	• intranet.unicredit.eu
Default Status	• For now the Group Intranet (GI) is the homepage for those companies, entities, and divisions that have completely migrated to the new solution. In the future it will be the homepage for all employees of the banking group. • The GI has two main versions: o intranet.unicredit.eu for recognized users o omni.intranet.unicredit.eu for anonymous users depending on some infrastructural and network aspects of their access point • Although users are recognized based on their user ID, they can also localize or generalize their content viewing. For example, if their company/entity/division provides targeted content, it will be shown in highlighted positions. But they can also set a "target by choice," meaning they can choose to see content from geographic areas other than their own, such as Central and Eastern European countries. Furthermore, users can set and personalize their tools and small apps such as the canteen menu. Employees can also set (and change) their own languages.
Remote access	• Users can access the Group Intranet — as well as some other Group web tools — when they are not on the corporate LAN, via the extranet. This is a standard feature for those users who work from home or while travelling.

Figure 2. UniCredit URL and Access Information

DESIGN PROCESS AND USABILITY WORK

Design Approach

The team decided to take a user-centred design approach for the project from the very start. This approach, while commonplace in many organizations, was considered a very bold choice at UniCredit, as this type of methodology was not very well known within the organization. Some people even considered it to be and inefficient approach due to the amount of time and money required for user testing and prototyping before starting to code. The design team felt the way to convince the organization that this investment in time and effort would pay great dividends was through data. This was a wise move as facts and figures were a good selling point.

“As soon as we shared data and facts from previous projects, showing that not only the final product is of higher quality, but that you actually save time and money by using UCD — as the need for rework diminishes drastically — we had both Communications and IT fully committed,” says Delton.

Involving Users

At the official project kick off in April 2010, more than 40 colleagues from different countries, companies and departments were brought together with external experts to form the core project team. This team began its work by identifying six project streams that would cover the main themes they needed to address:

- **Concept and design:** Create the user experience and interaction design solutions for the intranet.
- **Information architecture:** Determine the content selection, organization, and structure of the intranet.
- **IT and development:** Conduct technical analysis and implement the intranet solution.
- **Governance:** Define principles and rules for the effective management of the channel by internal stakeholders.
- **Communication:** Communicate with top management and stakeholders, and promote the Group intranet to colleagues.
- **CMS:** Collect requirements, design, and test a WYSIWYG content management system.

The project began with a three-day, full-immersion workshop in Turin. “It was very tough,” says Delton, “but at the end of the three days we had a list of macro requirements and the consensus of the whole project team.”

On the basis of these requirements, they started a cycle of international user tests, the first occurring only a few months after the kick-off. During these focus groups and one-on-one sessions, held in Europe, they presented a low-fidelity prototype to the participants to test reactions to the concept. The qualitative results were then validated with an online survey.

“It was all extremely inspiring and the findings from these tests have been the basis for further developments,” he says.

From there the team worked in earnest to include users at nearly every point in the design process and employed a wide range of UCD techniques.

“I think we applied almost every existing UCD technique!” says Chlapoutakis. “We started by defining the personas, which was then followed by workshops, focus groups, card sorting, testing on low- and high-fidelity prototypes, and testing in a live environment. By the end of the project, more than 3,500 colleagues had been involved in some kind of user testing.” And whenever possible, the team always tried to follow qualitative testing with quantitative methods, such as online surveys and card sorting.

They tested with end users and also with editors, who are an important user group for the organization. The team wanted to see if they could not only improve the user experience for the editors but also reduce publishing time. Their efforts paid off as the average time needed to publish news was reduced by 65% compared to the previous CMS.

Post Launch: The Work Continues

Once the site was launched, the team gathered their primary data from web analytics but also continue to conduct user test sessions once a year. “It is less about checking what is working than an attempt to stay ahead of user expectations,” says Luca di Bari, Digital Internal Communications. “When we started testing in 2010, for example, drag and drop was too difficult for our users. Now they expect it and get confused if they can’t drag and drop an item!”

Maintaining good relationships with other multinationals has also paid off for the team. “It is a great source of inspiration even if the peculiarity of each large scale multinational sets it apart with its own story,” says Delton. The team has been able to hold online meetings with other companies and share their experiences redesigning, managing, and governing online channels.

Working with Agencies

The new intranet is the result of close cooperation between the internal working group comprised of forty staff from Communications, IT, HR, UniCredit Business Integrated Solutions and its partners (Microsoft, Avanade), a team of user experience experts and interaction designers from Assist, members of the UX Alliance, D+S 360°, and the Nielsen Norman Group (which provided consulting services). “It really does take a village,” says Delton.

The agency, Assist, supported the team throughout the entire project. In fact their relationship dates back to 2003, when they were the ones that first introduced the UniCredit team to UCD methodologies.

Assist supported the team in user research and user-centred design methods throughout the various steps of the project, but has also assisted with preparing documentation and presenting it to stakeholders.

”Throughout most of the project, the Assist team worked shoulder to shoulder with us. This has been a continuous process of transfer and sharing of knowledge, meaning that we could not have possibly managed certain activities alone, such as definition and testing of the IA, we now do mostly by ourselves,” says Delton. “We consider their team’s experience an indispensable element in the success of our project and the cooperation is still on-going.”

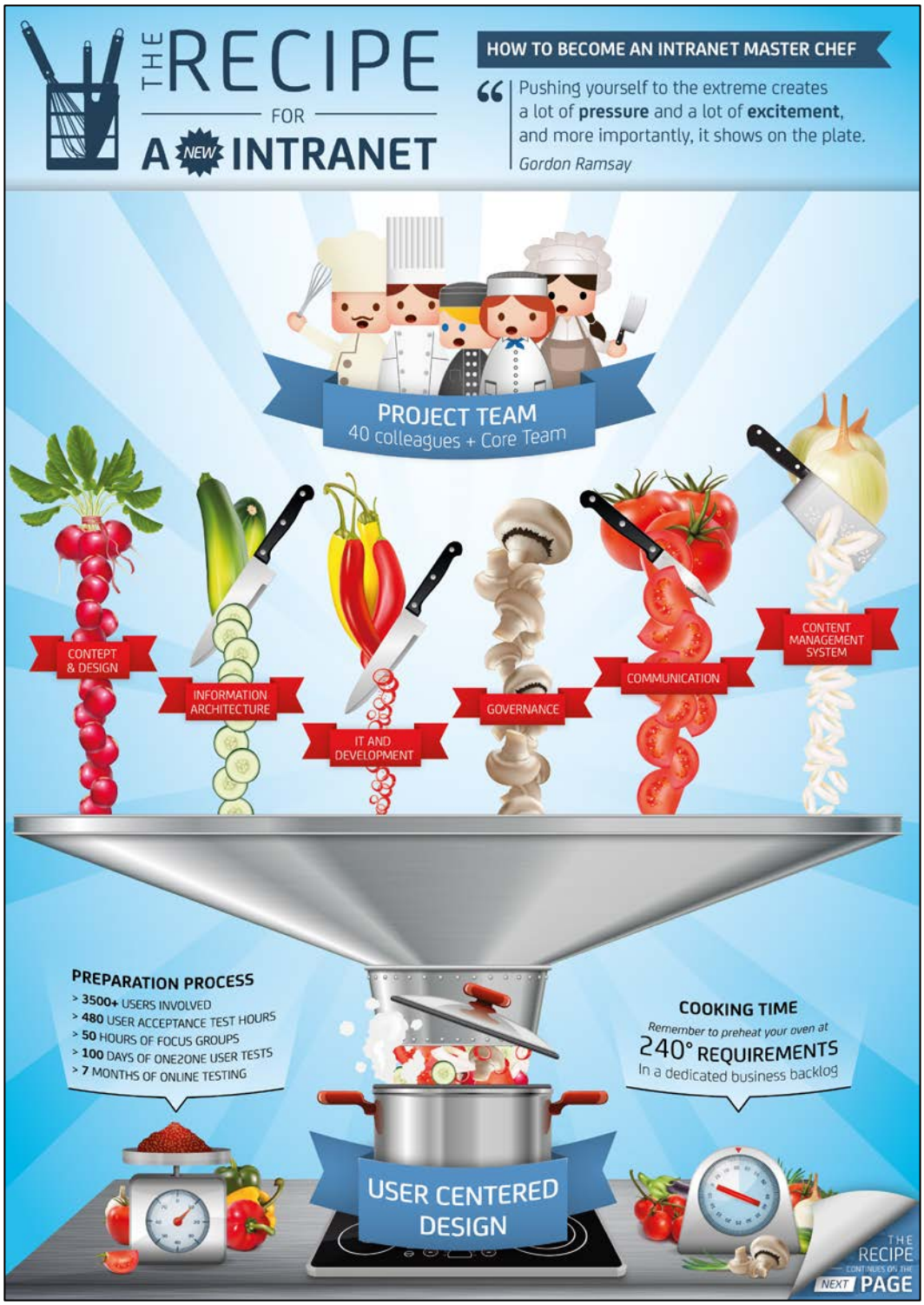


Image 11. UniCredit Intranet: The Recipe for Succcess. This two-page infographic (this image and the one below) illustrate what the UniCredit team considers the perfect recipe for creating a good (tasteful) intranet. *133_UniCredit_Group_Intranet_11a_Recipe_infographic_page_1.png* and *133_UniCredit_Group_Intranet_11b_Recipe_infographic_page_2.png*


THE RECIPE CONTINUES FROM THE PREVIOUS PAGE
INTERNATIONAL FOCUS GROUPS
CONTENT MAPPING
ONE 2 ONE INTERVIEWS
TESTING ON LIVE INTRANET
REMOTE TESTING
PROTOTYPES
SURVEYS
LABEL TESTING
WORKSHOPS
LOOK & FEEL TESTING
CARD SORTING
SECRET INGREDIENT*
EXPERT REVIEW
*Never forget a dash of good content
WORLDWIDE TÆSTERS
3500+ colleagues
THE GROUP INTRANET
-MENU-
MAIN COURSE
GROUP INTRANET
Homepage as Entry Point, Search Features, Targeting, Flexible IA, Enhanced Editorial Formats, Multilanguage, Social Features, Personalization
SIDES
Content from local entities - UniCredit Business Integrated Solutions, Central and Eastern Europe, Corporate Investment Banking, UniCredit Czech Republic and Slovakia, UniCredit Italy
DESSERTS
Apps & widgets - Home banking, Phonebook, Podcasting, International Holiday Calendar, Canteen Menu, Financial Dictionary

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2000	• **USI Portal:** The first intranet in the former UniCredit Group, USI (UniCredit Servizi Informativi), the in-house company dedicated to Information and Communication Technology.
2001	• The first release of the enterprise portal for Italian entities, scaling up the USI Portal.
2003	• **Transfer of the governance** of the channel from USI to the newly established Holding Internal Communications team. • The first redesign of the portal applying user-centered design methods.
2006	• **Group portal, version 1:** The first Group international communication platform created following the merger with HVB Group. Content was available in three languages: English, German, and Italian.
2007	• **Group portal, version 2:** The version after the merger with Capitalia group. This version was available to approximately 20,000 more colleagues. • Further developments in this period allowed the intranet to provide content in two additional languages: Polish and Russian.
2010	• New Group intranet project kick-off
2010–2011	• Intranet concept definition and initial user tests • International workshops with the project team
January 2012	• **UBIS intranet:** The first release of the intranet for the new company, UniCredit Business Integrated Solutions.
Summer 2013	• Content migration from old to new OneGate Group Intranet.
August 2013	• The launch of OneGate Group Intranet with additional languages and targets.
2014	• UniCredit Bank in the Czech Republic and Slovakia is added to intranet. • UniCredit Group intranet adds Czech and Slovak to its list of languages, bringing the total to seven.

Mid 2015	• More content will be added to Group intranet to serve Italian colleagues, and the current Italian portal will be switched off.
2015–2016	• Group intranet will be launched for other companies and entities to replace their intranets.

Figure 3. UniCredit Project Milestones

CONTENT AND CONTENT CONTRIBUTORS

The CMS is a customized version of SharePoint 2010 and although the team considered other solutions, it became clear that the best solution was to start with the integrated CMS and tailor it to their needs, rather than to invest in a different solution with which they had no experience.

Approximately 100 people contribute content for the site. Not all of them are full-time editors but many are content owners. Content governance is decentralized with many content providers drawn from both the Group level and the local target providers. Content providers that provide content for local entities are called "Target Owners." They have their own specific communication needs and are free to follow their own strategy as long as the overall coordination and sharing are assured through regular editorial planning meetings with the other target owners.

Instead of imposing strict top-down rules, the organization has provided a very clear governance framework that was built in collaboration with a working group composed of colleagues from all the main legal entities of the Group. The account managers of all Group internal communication teams provide support and guidance.

"We provide regular training to all editors in classrooms or via video conference," says Chlapoutakis. "But, most important, we advise on which editorial template would be the most appropriate, the best publication period, and how to promote the content both within and outside of the intranet."

In addition to providing support mechanisms for the authors, they also take a "train the trainer" approach. Some local editors are appointed as trainers, usually based on their proficiency in digital publishing and the amount of content they are responsible for. They receive a complete introduction to the Group intranet and an education on digital strategy, not just limited training that would help them edit in the CMS. The training is provided on a regular basis, several times a year, or when new features are released. The training can also be given on demand when new entities join the Group Intranet.

After the course ends, attendees can access a rich array of guidelines and manuals that is intended as both a support mechanism and as training material for the newly trained editors to help as they train their colleagues. The following list shows the range of manuals and guidelines available to support editors in their work:

- **The Group Intranet Concept Book:** A document that illustrates and explains the concept behind the intranet and the reasons why things are as they are.

- **Digital Internal Channels Framework:** A guide to the relations between the three main informative environments (Group Intranet, OneNet, the Business Desktop) and other minor channels.
- **Information architecture:** A set of guidelines that describe the principals of navigation, structure, organisation of content, and how these principals were defined.
- **Graphics guidelines**: A set of guidelines that define the colour palette, typography, and other graphical elements that are required to build a seamless user experience in the internal digital channels.
- **Web writing:** Describes the fundamental principles for writing effective web copy in English for UniCredit's websites and intranets.
- **Editorial formats:** A set of instructions that guide editors through the publication process for the intranet, starting from what kind of content has to be published and how the editors want to present it.
- **Editorial workflows:** A general introduction to the actors, flows, SLAs and Editorial Plan that govern the Group Intranet.
- **Training manuals:** A detailed introduction for editors about CMS functionality, features, content types, and how to publish and manage content on the Group Intranet.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and OS	• Microsoft Web Server IIS, Windows Server 2008 R2, virtualized hardware
Bug Tracking/Quality Assurance	• SharePoint Team Foundation Server (TFS)
Design Tools	• Adobe Illustrator, Adobe Photoshop, Axure, Balsamiq, and PowerPoint
Site Building Tools	• SharePoint Developer and Dreamweaver
Content Management Tools	• SharePoint
Search	• SharePoint 2010
Other Functions	• SAP, Active Directory, Site Catalyst for web analysis

Figure 4. UniCredit Intranet Technology

SEARCH

The site takes advantage of the native search capabilities of SharePoint 2010, though it has been highly customized, as Chlapoutakis explains:

> "We have customized the product a great deal and are using, for example 'language' and 'topics' (keywords), 'format' (for video, presentations, news, etc.), and most important, 'target/audiences' to make sure the content gets in front of the various populations for whom the content is targeted."

The target/audiences refiner is very important because one of the core milestones for the intranet project was to ensure that all users could access "extra target" content by search or by link.

The team is also currently working on a cross-site search project, designed to:

- Optimize the current Group intranet search engine
- Expand scope of the search engine beyond the Group Intranet to The Enterprise Social Network and Business Operative Intranet — collectively the three main digital channels
- Provide a set of guidelines for future inclusion of other digital channels

RESULTS AND ROI

A primary project goal was to provide a scalable framework for those companies and entities within the organization that wanted to join. The organization followed the adage, "if you build it they will come" and it has paid off. When UniCredit's operations in the Czech Republic and Slovakia merged into a single bank with headquarters in Prague last year, the new intranet offered an easy way to provide its 3,500 employees with an internal channel that was ready to go. UniCredit's Corporate Investment Banking division with 9,000 employees has already made the transition and so has UniCredit Central and Eastern Europe division with a staff of 30,000.

Other key parts of the bank are in the process of conducting feasibility studies and considering the new intranet, including UniCredit's Italian operations with over 50,000 employees and Bank Austria with 10,000 employees.

"We are enthusiastic about having developed a model that fits many possible organizational evolutions as they arise, and is ready to welcome new organizations on board," says Regis, "And we also have usage data that confirms the positive trend in terms of noticeable increased access to group wide communication."

Considering that one of the pillars of the intranet is to provide users with Group content (of interest) side by side with content produced at local level for local communities, every time a new company or community of the Group adopts the new intranet model it is an advantage for communication from both a global and a local perspective. This is a win because users find all the messages addressed to them, directly, without searching or switching from one environment to another.

The user tests consumed a substantial part of the budget for the new intranet project. Over three years, about 10–15% was spent yearly on research and refining the user experience. So while this success did not come for free it was worth every penny. "This figure normally tends to be around 5%," says Delton, "but the investment was worth it. Our content structure has proved highly sustainable. Colleagues are able to find what they are looking for, join and stay on the intranet more, and are more satisfied in general."

Another demonstrable success for the team: the site was chosen as the winner of the European Excellence Award for Best Intranet in 2013.

Some additional statistics illustrate the success of the site since launch:

- **Daily visitors** went up 50%.
- **Bounce rate** dropped 53%.
- **Page views** (2012/2013) up 95% — meaning the average number of page views of a single page, as well as total page views collected by the intranet, rose by 95%.
- **Average content-retrieval time** decreased 67% (thanks to advanced search). For example, the task, "please find page X or the news article X," was performed in two waves of testing: first with the old platform, then with the new platform. Using the old platform (without a search engine) the average time to retrieve the content was 67% higher than in the new one.
- Average **publishing time** decreased 65%. This was measured by testing how long it took to publish the same kind of content in terms of complexity (images, multimedia, links, number of different languages, etc.). Editors working on the new platform take an average of 65% less time to complete this type of task than on the old intranet.
- **Overall satisfaction** rose from 38% to 79%.

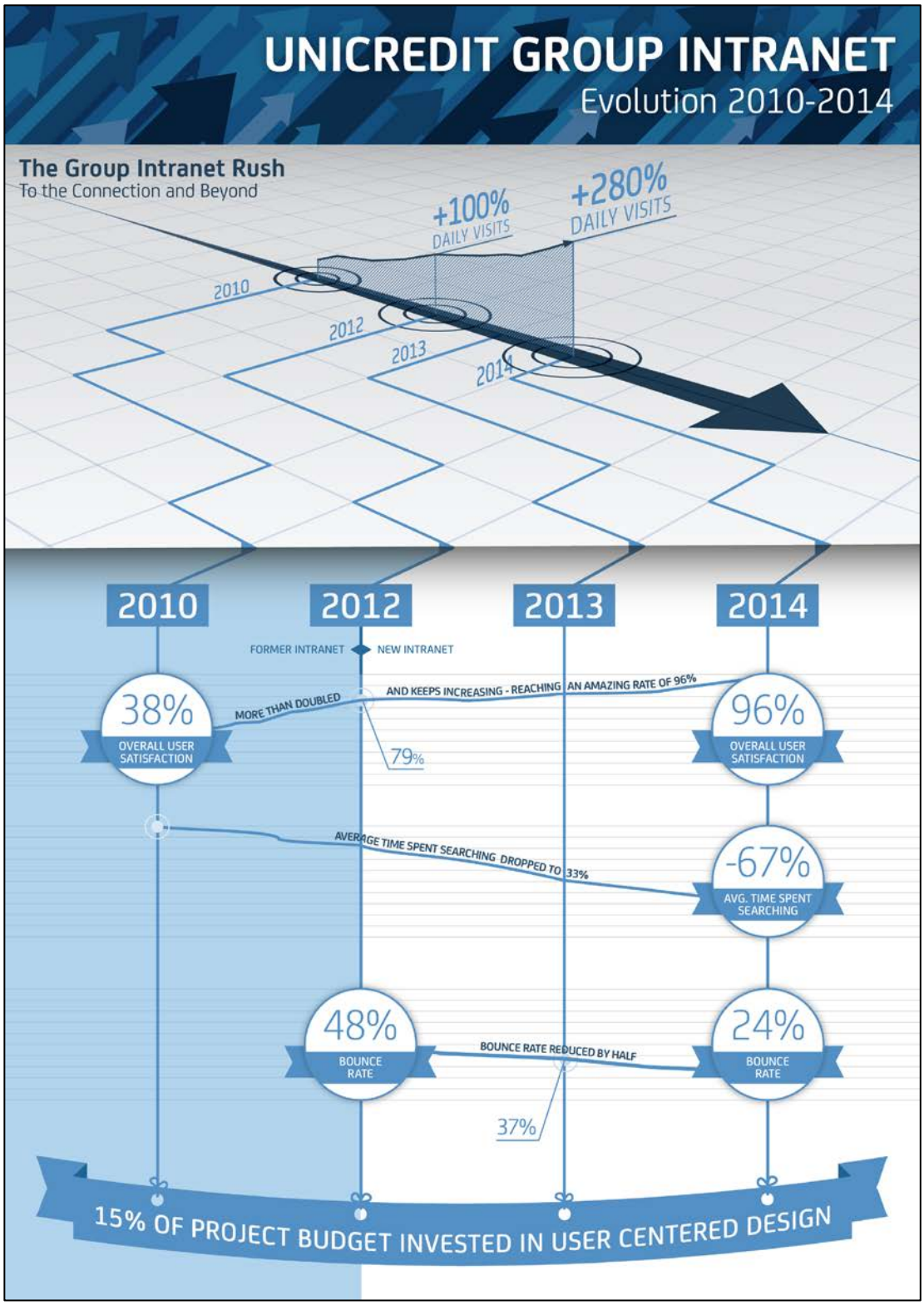


Image 12. UniCredit Intranet: Evolution. This infographic illustrates key figures relating to how the UniCredit Group intranet has evolved over time. *134_UniCredit_Group_Intranet_12_Evolution_infographic.png*

LESSONS LEARNED

UniCredit team members share some of their lessons learned:

- **Plan carefully but be flexible.** "From the very start we worked with the demands of users and internal stakeholders to create a well-defined framework, which we called the 'intranet concept.' The concept was applied in a rigorous manner in order to meet project goals and to ensure its success. Despite our efforts to ascertain requirements and commit stakeholders in the project phase we realized that, in a context as heterogeneous as ours, the requirements would never stop changing and that new ones would always emerge. Although having a set of guidelines is crucial, you always have to be ready to analyze the specific needs of your end users and stakeholders and, if necessary, leave the guidelines open for customization." –Delton
- **Invite contributions from across the organization but understand not everyone can contribute in the same way.** "An intranet collates a huge amount of content and services from different departments, which all have their own projects with specific constraints, thus they cannot always give support when it's requested. However, by organizing the project in streams — and within those streams — small work groups of people from different departments can be kept up to date and, if there is not full support from them, they can at least provide guidance. This has helped us a great deal in reaching our goals." –Delton
- **Agile works best.** "Do it Agile. Don't invest too much time in writing functional specifications with excessive levels of detail. At the end of the day, the developers only look at your wireframes. So be sure that the wireframes are clear and sit down with the developer and discuss them and, if necessary, re-sketch them." –Joachim Hiorth, Sr. Project Manager, Assist
- **Design is not a democratic process.** "User testing is fundamental, but you shouldn't use the results as you would for votes in a poll. Just because the majority of the users prefer one solution to another, doesn't necessary mean that it's a good design. Intranet users tend to be extremely conservative and wary of change. Design is not a democratic process." –Francesca Gabrielli, Digital Experience Managing Director, Assist
- **Use a variety of research methods:** "By combining various methods of collecting feedback and requirements such as workshops, one-on-one interviews, online surveys, expert reviews, and so forth, and doing this with different user types like end users, stakeholders, experts, managers and the like, it gives you a very good indication what to develop and how." –di Bari
- **Determine how you will apply the results from user tests.** "It is important to have a procedure in place concerning how to use the findings of user tests. In our case, we compared the requirements gained from the test results against corporate needs and communication needs. After that we assigned each requirement a priority based on its global usefulness and developed it (or not) depending on the complexity and effort required." –Chlapoutakis

- **User tests can be great for furthering internal marketing efforts.** **"**We did not realize how powerful a user test could be for internal marketing. Colleagues were eager to participate and, after the test, they would sometimes write us an email thankful for 'having been listened to'. User tests are a great instrument for consensus building on all levels." –Delton
- **Use technology to your advantage.** "After the first cycles of international user tests, we realized that we could get the same information by using video calls. Specifically, we used Microsoft Lync which made it possible to test users while they were sitting at their workstation in their usual work environment." –Hiorth
- **Content is king.** "You can provide the world's best user experience with cutting-edge features and a ground-breaking design. But this is an intranet, not a design contest, and at the end of the day it really comes down to the quality of the content and how you provide it." –Regis
- **Think big, start small, and measure it.** "When we began working on creating a new service company of the banking group, UniCredit Business Integrated Solutions (UBIS), one of the first problems we encountered was how to manage integration not only of different countries — as many as eleven by then — but, most important, of service. We asked ourselves how we could reach people who had different needs, operated in different locations and came from different companies. We wanted a single channel that would not only function for communication but be a place where one could find tools as well — over 150 employee applications — and we decided the intranet network is this channel." –Marcella Mariani

  "In 2011 the decision was taken to create a new company, UniCredit Business Integrated Solutions (UBIS), and they urgently needed an Intranet. Although unpredicted during the initial planning stage, it soon became clear this was a great opportunity to test the Group Intranet's concept on a smaller scale, as UBIS has 14,000 employees in 11 countries and communicates in three languages. It was the typical situation in which we could think big, start small, and measure the impact to build on that backbone." –Delton

In the interest of full disclosure we would like to communicate that the UniCredit intranet team is a consulting client of the Nielsen Norman Group. While we are honored to have them submit and win the Intranet Design Annual, this design was given no special treatment in scoring. Due to the nature of this contest, it is impossible to do blind reviews, however the scoring grids used to select the finalists are followed strictly, to help ensure fairness.

Cadwalader, Wickersham & Taft LLP

OVERVIEW

COMPANY

Established in New York City in 1792, Cadwalader, Wickersham & Taft LLP is one of the oldest continuously operating law firms in the US.

Headquarters: New York, NY

Company locations: New York, London, Charlotte, Washington DC, Houston, Beijing, Hong Kong, and Brussels

Locations where the intranet is used: All company locations.

Annual sales: N/A

THE INTRANET

Users: Approximately 950

Mobile approach: N/A

Technology platform: SharePoint 2013, Handshake, Neudesic-Pulse, Recommind Decisiv Enterprise Search, 9 Dots

TEAM

Intranet project leadership: Tom Baldwin, Chief Information Officer; Mitchell Wallsh, Director of Special Projects; Jeannine Zito, Senior Manager of Reporting, Projects & Initiatives; Robert Robertson, Director of Strategic Business Development; John Kruse, Director of Knowledge Management; Brian Lacy, Associate Director of Business Application Services; Mark Fellin, Marketing Content and Communications Manager

Intranet development: Erez Parag, Web Development Manager; Eyal Guy, Web Developer; Joseph Sims, Senior SharePoint Developer; Justin Tullo, Knowledge Management Analyst; Devendra Nayee, SharePoint Developer; Roxana Martinez, Senior Business Analyst

Dashboard development: Albert Chan, Senior Manager of Application Services; Delroy Miller, Senior Financial Systems Engineer

Business sponsors: The intranet project was developed in concert with a strategic initiative focusing on knowledge management, and was supported by the internal team of lawyers and professionals dedicated to the initiative (known as the "Knowledge Management Initiative Team"). The team's proposals were endorsed and supported by Cadwalader's Management Committee.

Door3 (design agency): Michael Montecuollo, Director of User Experience & Design; Rick Cornett, Senior User Experience Designer

INTRANET TEAM



Team members shown here (left to right): Sergey Ivanushkin, Justin Tullo, Mark Fellin, Tom Baldwin, Roxana Martinez, John Sullivan, Jeannine Zito, Al Chan, Eyal Guy, Delroy Miller, Devendra Nayee, John Kruse, Bob Robertson, and Brian Lacy.

HIGHLIGHTS ABOUT THIS WINNER

Cadwalader's new intranet, Connect, was inspired by the Knowledge Management Initiative Team, which sought to implement an updated system to improve information sharing and finding. This, combined with a need to enhance the existing intranet to foster collaboration and a sense of community, led to the latest intranet to support Cadwalader, a law firm consisting of 950 users in New York, London, Charlotte, Washington DC, Houston, Beijing, Hong Kong, and Brussels.

The team implemented a series of changes and new site features to enhance knowledge sharing and communication within the organization.

- **Enhanced Search:** The new site consolidates data sources to produce a single point of entry to knowledge resources. This helps the Firm provide more efficient access to available data, which assists it in more efficiently delivering services to clients.
- **Dashboards:** The site includes partner-focused data dashboards. These dashboards pull daily data from the Firm's financial systems to give partners fast and reliable access to information, such as work in progress and accounts receivable data.

- **Facilitating Connections:** An enhanced Firm directory supports connections between colleagues by providing more detailed attorney biographies. Supervising attorneys can aid junior attorneys in building their personal brand by suggesting skills to add to their profiles. Simple features — such as lists of new hires and anniversaries — introduce employees to one another and deepen relationships. Robust features as well as small details all work to create a greater sense of community throughout the Firm's offices.
- **Single Platform:** Regional sites have been consolidated into a single global intranet, supporting users from Houston to Brussels, from London to Beijing. The site supports various languages, including Chinese characters, to allow content to be posted in languages other than English when appropriate.
- **Modern Design:** A cohesive design supports the Firm's branding and helps create a sense of community. The site uses a flat user interface with a clean look and feel, along with just five templates: home, category listing, detail page, content, and search results. This supports a consistent experience across the site.

  The team decided to integrate tools rather than link to them. The Firm directory, search, and dashboards were all integrated into the site to create a seamless and cohesive experience. The Firm's goals moving forward are to have all web-based applications adhere to the design guidelines and be accessible through Connect whenever possible.
- **New Technology and New Processes:** Due to the use of new technologies and a tight time frame, the team employed a lean development process. The team created a minimum viable product (MVP), inclusive of all key components, and was able to work iteratively and make changes based on real data from real users on a real interface.

BACKGROUND

Through the work of the Knowledge Management Initiative Team, a dedicated team made up of Cadwalader lawyers and other professionals focused on issues surrounding knowledge management, the Firm identified the need to design and implement a knowledge management system to improve information efficiencies in connection with the Firm's client business development, internal communication, and, ultimately, delivery of legal services. It was contemplated that the system would include the ability to search information and expertise across separate databases and management information systems in a seamless manner. At the same time, the Firm was also having conversations around ways to enhance its existing intranet by updating it with a new, state-of-the-art intranet platform that would contribute to the Firm's efforts to foster collaboration and develop an enhanced sense of a "Cadwalader Community."

Ultimately these goals were addressed through the creation of a new intranet (Connect) that featured a sleek design, along with new and enhanced features to provide users with powerful tools to manage their business, strengthen internal and external relationships, provide more efficient access to data, and assist in more efficiently delivering services to the Firm's clients.

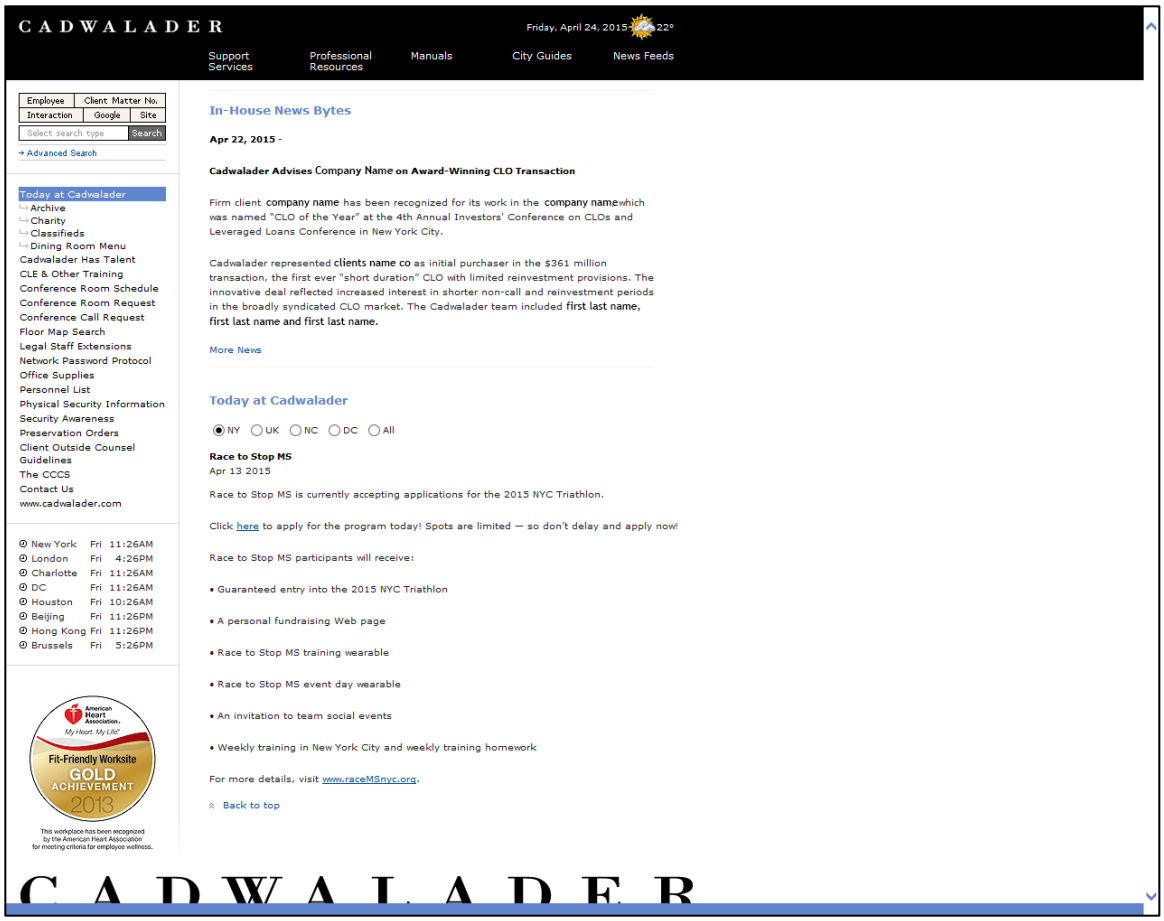


Image 1. Cadwalader, Wickersham & Taft Intranet: Old Intranet Homepage. Prior to the redesign project, this PHP site had been the Cadwalader intranet since approximately 2004. *08_Cadwalader_01_home_version1.png*

Objectives

- **Facilitate a single point of entry to the Firm's knowledge resources** by creating a seamless and cohesive intranet experience for the Firm's end users. This approach will drive increased usage of systems within the Firm and help effectively share knowledge of the Firm's work and expertise.
- **Enable enterprise search** via the Recommind search platform, allowing for faster and better access to institutional knowledge and sources of expertise.
- **Increase awareness of the experience of the Firm's lawyers** by implementing Neudesic's Firm Directory experience management system.
- **Consolidate development platforms** by implementing SharePoint 2013 as the Firm's new standard web development platform. This will also allow implementation of mobile access in the future.

- **Provide users with one global platform**, consolidating independent regional intranets and content from various research tools.
- **Support the Firm's branding and foster a sense of a unified community** by developing a new visual design focused on a simplified flat UI theme and a strategic use of color, design, and layout, and by using that design standard consistently across web assets in the future.

Challenges

The intranet project team made a strategic decision to deliver a minimum viable product within a short time frame so they could iteratively enhance the system based on user feedback. This approach meant that team members had to be more disciplined in development cycles to mitigate scope creep, but it enabled them to launch the product faster and iterate more quickly.

The intranet project was executed during a time when the Firm's IT department was implementing processes and software development methods that were new to the organization, and the web development team was getting up to speed with the new SharePoint 2013 ecosystem at the same time. Therefore, the intranet project team simultaneously learned the new processes and new technology in order to deliver the new intranet in a timely and efficient manner.

DESIGN REVIEW

Homepage

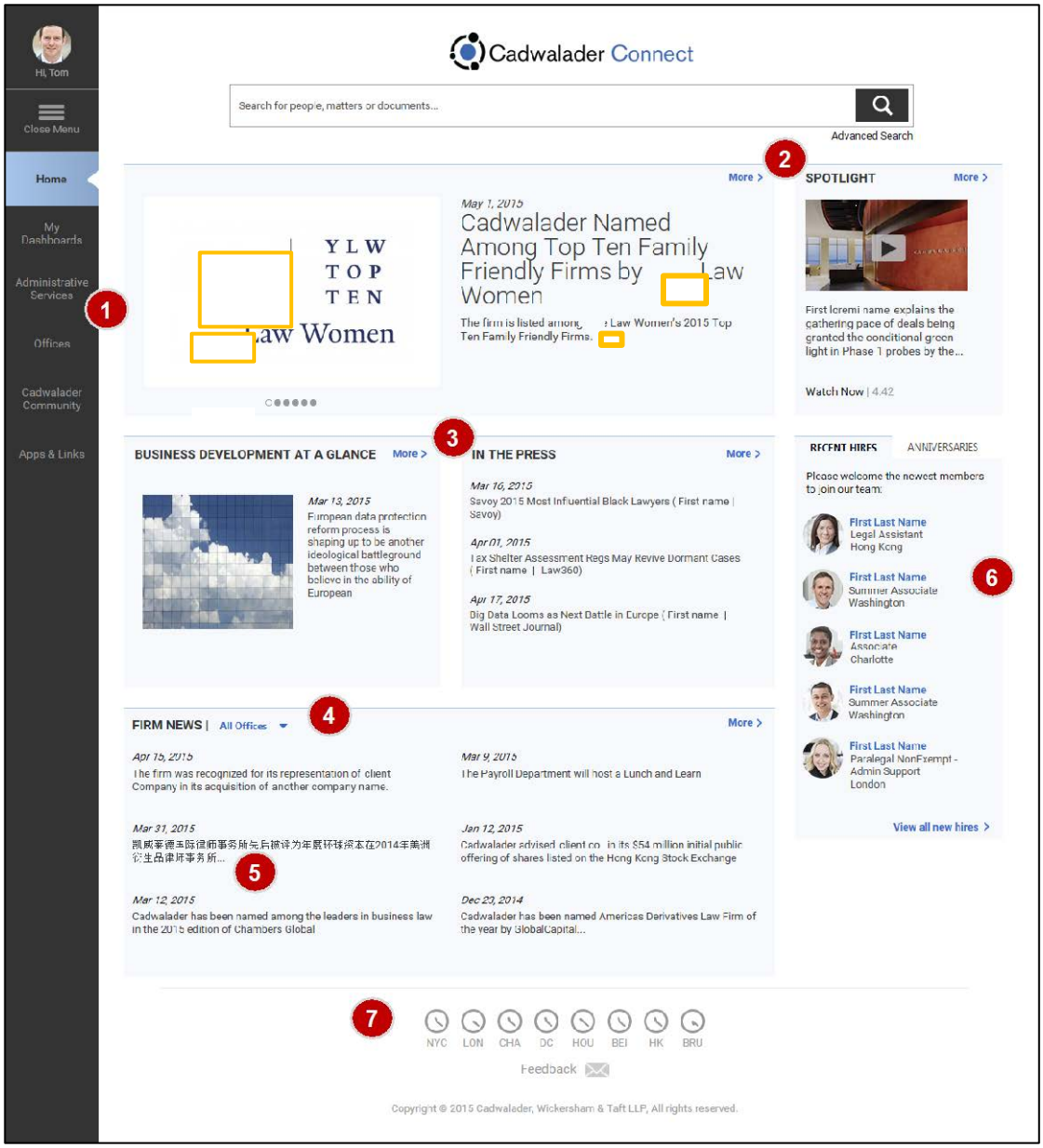


Image 2. Cadwalader, Wickersham & Taft Intranet: Homepage.
09_Cadwalader_02_home_live.png

Homepage Highlights

1. **Navigation:** Each page on the site features the global navigation on the left side of the page. This provides quick access to dashboards; services (such as *Administrative Operations*, *Knowledge Management*, and *Talent Development*); office information; community information (such as alumni, diversity, and pro bono programs); and business tools (including firm manuals, outside counsel guidelines, most commonly used items, and access to applications). A blue highlight and white divot indicate the currently selected page. The addition of *Offices* to the main site navigation is notable. The Firm grew globally after the previous iteration of the site was created. This placement of office information on the top-level navigation makes the global status more apparent, as well as making other locations feel represented on the site.
2. **News:** The homepage features a news carousel at the top of the page, with six featured stories. Each story includes an image, the date it was published, a headline, and a brief summary. Users can also view additional news via the link to *More* in the top right corner of the section.

   Another piece of content is featured in the *Spotlight* section. This area of the site can contain multimedia content, such as a video. Videos are indicated by a "play" arrow on a still from the video as well as a *Watch Now* call to action, which is accompanied by the length of the video. These all clearly indicate that the content is in a video format.

   Each item on the homepage goes through an approval workflow. An administrator reviews and approves the content, and then Business Development and Marketing and Communications vet it before it is posted to the site.
3. **Business Development and *In the Press*:** The *Business Development at a Glance* section keeps users informed of the latest news about the Firm's wins, pitches, and business development activities. This section promotes cross marketing by informing attorneys about client relationships and matters firm-wide.

   In the Press features mentions of Cadwalader and its attorneys in the media, with the date the item was mentioned, the names of attorneys mentioned in the story, and the source.
4. ***Firm News*:** *Firm News* defaults to showing content from all offices across the Firm. Users can also easily and clearly select which specific office they are interested in via the *Offices* menu next to the section heading. As with the news in the carousel, items are clearly dated, with the name of the month abbreviated or spelled out. This is particularly helpful for international staff members, who might be confused if numerals rather than words are used in dates (for example, "2/5" is read as "February 5" in the US and "May 2" in Europe). Each news item also includes a brief summary.
5. **Support for Multiple Languages:** The site supports multiple languages, including Chinese characters, making it inclusive for users around the world.

6. **Recent Hires:** One of the goals of the site was to help make connections across the Firm. The site supports this goal in many ways, including listing recent hires and employees with anniversaries on the homepage of the site, together with a photograph. Such seemingly simple features can go a long way to building a sense of community and inclusiveness in an organization. Even seeing an image and associating a name with a face can facilitate a connection.
7. **World Clocks:** The bottom of each page on the site features a set of world clocks, with the current time displayed for each of the Firm's eight main offices. This also helps with inclusion on the site, as every office sees itself represented, even in a very simple way, on the site. This also serves the practical purpose of giving users a quick way to translate time zones.

Search

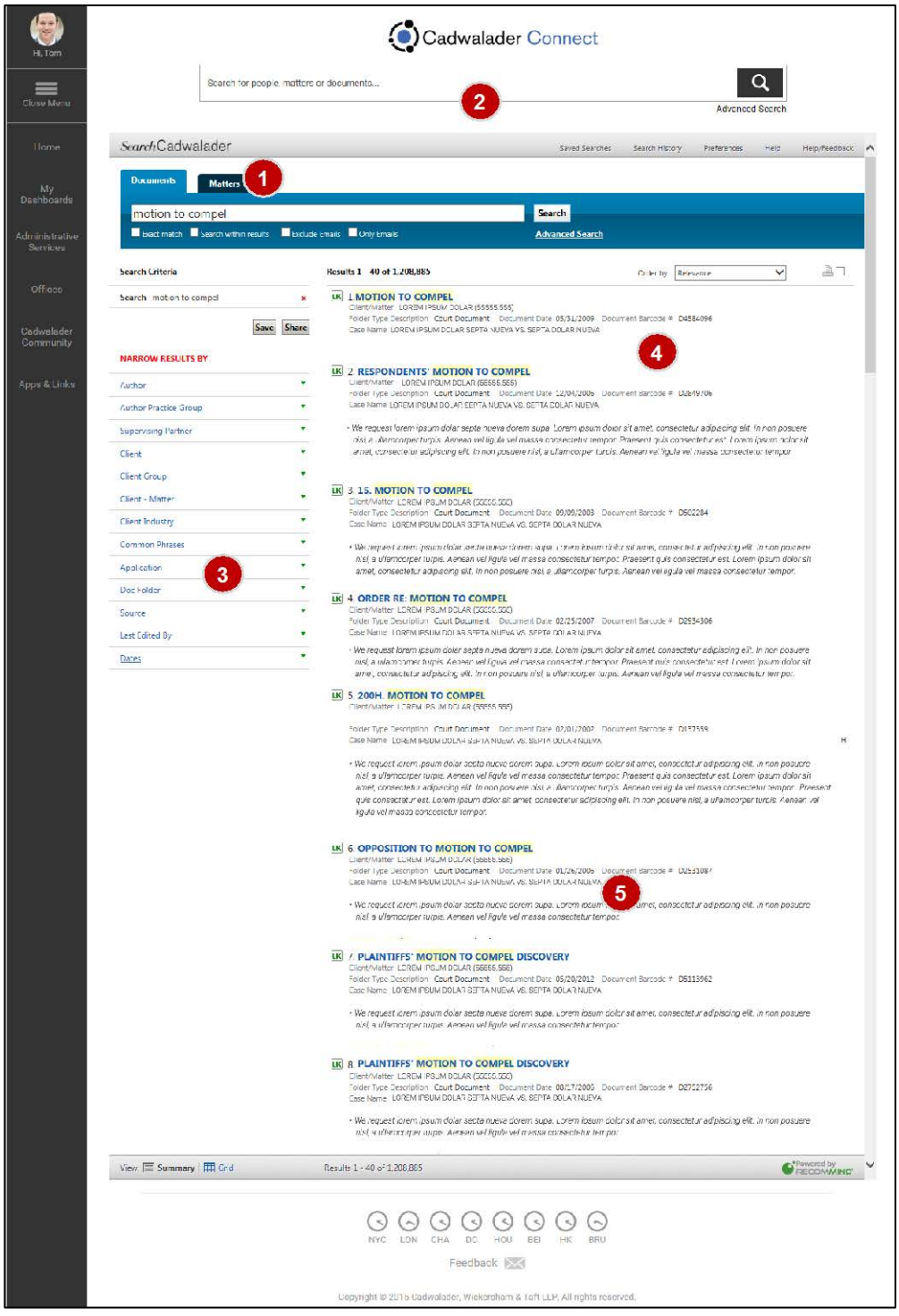


Image 3. Cadwalader, Wickersham & Taft Intranet: Search Results.
10_Cadwalader_03_MatterResults_live.png

Search Highlights

1. **Enterprise Search:** The new site offers users enterprise search for the first time. The Firm needed a way to search work product, available client matter information, and expertise across database and management information systems. It selected the Recommind search platform, which is tuned to the needs of the legal market, as well as Microsoft FAST to crawl content on SharePoint. This feature has received rave reviews from users, who love the ability to search internal records across knowledge sources in a single intranet interface.
2. **Simple Search Interface:** The search bar is literally front and center in the design. The large search box allows enough space for complex queries. Filler text indicates the types of searches the tool supports (people, matters, and documents). The size and prominence of the search box is no accident; it was designed to draw attention to the newly enhanced tool. The employee search was already popular in the previous design, which influenced the prominent placement in the new design, but the true impetus was to put search up front, demonstrating that it had far greater capabilities than in the past.
3. **Filters:** Users have a wide variety of facets from which to select, including author, author practice group, supervising partner, client, client group, client matter, client industry, common phrases, application, document folder, source, last edited by, and dates.
4. **Confidentiality:** A key concern in a law firm setting is the confidentiality of information. The team needed to ensure along the way that the appropriate data protections and confidentiality rules were in place. This was necessary to restrict the delivery of results to those users without authorization.
5. **Results Details:** Results include not just the name and a brief description, but also some details about the result. For instance, matter results return the client/matter number and name, the folder type (such as court document), the document date and barcode, and the case name. This gives users additional information to determine directly from the results page if they have found the right piece of information.

Firm Directory Results

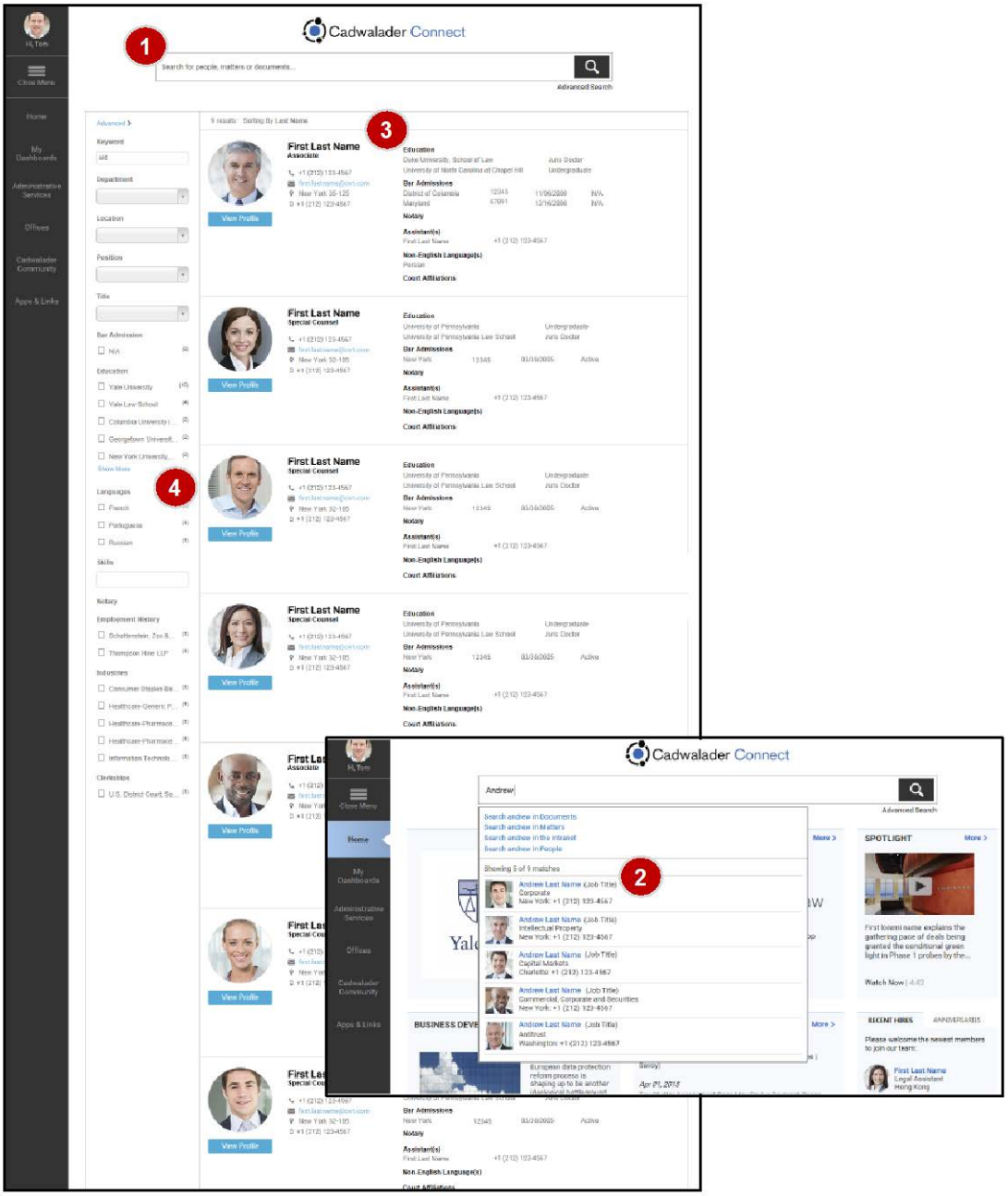


Image 4. Cadwalader, Wickersham & Taft Intranet: Firm Directory Search Results. *11a_Cadwalader_04a_PeopleResults_live.png* and *11b_Cadwalader_04b_Search_live.png*

Firm Directory Results

1. **Simple Search:** The site makes it easy to quickly find the employee of interest. Users can search for employees directly in the main site search box. This is shown clearly via the filler text in the box: *Search for people, matters or documents*.
2. **Type Ahead, Quick People Search:** Results appear as users type. The results that appear contain the employee's image, name, job title, division, office location, and contact phone number. This allows users to get the information they need without having to click into the full profile.
3. **Profile Details:** If users navigate to the full results page, robust profile information appears. The employee's photo, name, title, contact information, education, bar admissions, notary status, assistant information, non-English languages, and court affiliations are all clearly visible without even having to enter the employee's full profile. The page design is simple and clean, making it very easy to scan results and find the desired person.
4. **Filters:** Filters on the side of the page allow further refinement of the results. They allow keyword searches as well as filtering by department, location, position, title, bar admission, education, languages, skills employment history, industries, and clerkships. Each filter is listed with the number of matching results, helping users determine which filters to use to effectively get the results they need. For filters with many different categories, such as education, the most common categories are listed first, with a link to *Show More*. This lets users quickly scan the column of filters to see what options are available.

Firm Directory Profiles

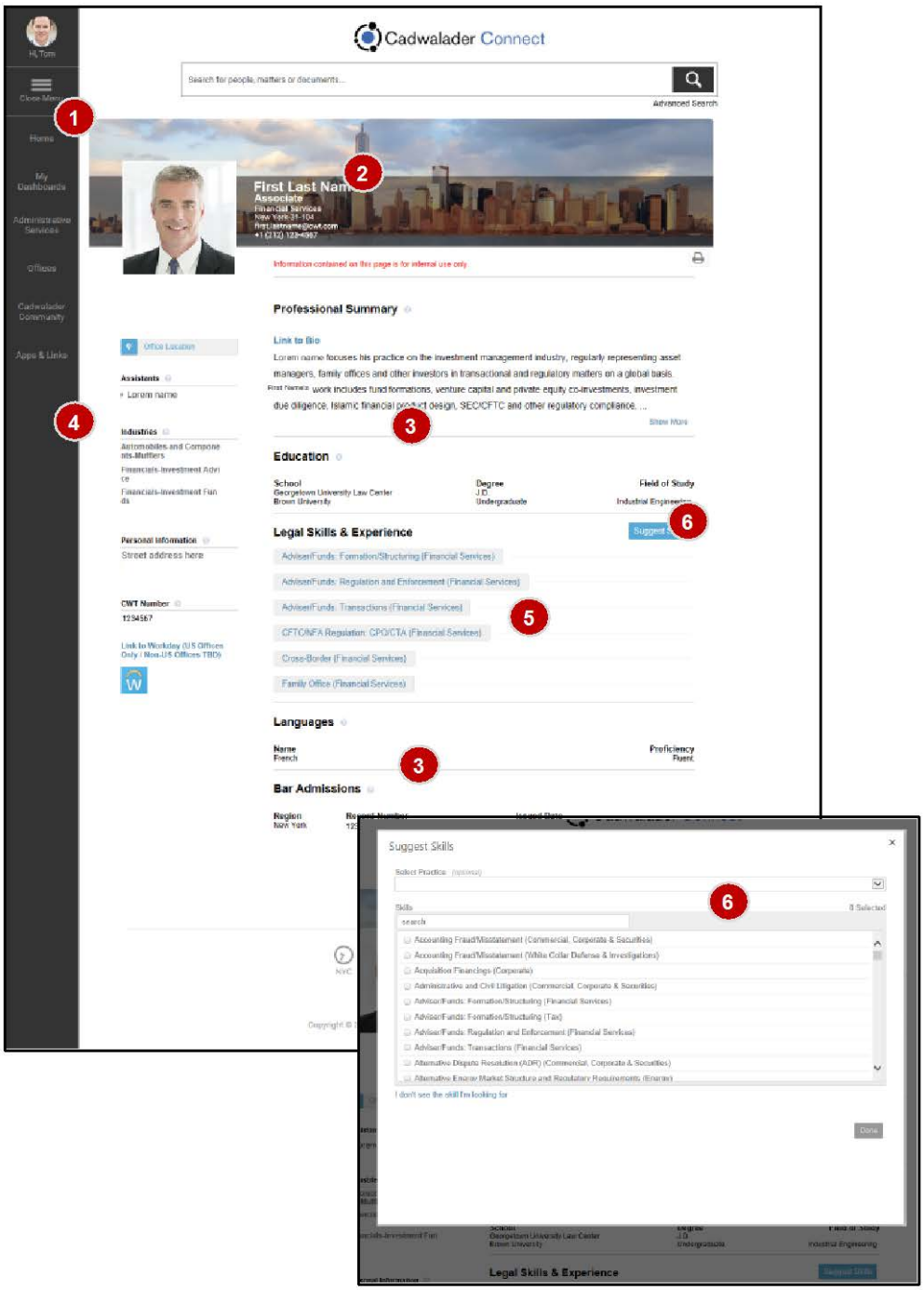


Image 5. Cadwalader, Wickersham & Taft Intranet: Firm Directory and Skills Suggestions. *12a_Cadwalader_05a_EmployeeProfile_live.png* and *12b_Cadwalader_05b_SuggestedSkills.png*

Firm Directory Profiles Highlights

1. **Focused on Law:** The Firm directory is built on Neudesic's Experience Management System, which collects and displays the Firm attorneys' experience and legal skills.
2. **Contact Information:** Each profile shows the employee's picture along with his or her basic contact information at the top of the page. An iconic image shows the office location of the employee as well.
3. **Background Details:** The body of the page includes a brief professional summary, followed by education information. The bottom of the page provides information on languages spoken, as well as the proficiency level in those languages, and bar admissions.
4. **Additional Details:** The side of the page provides the details about assistants and industries the attorney works in, as well as an option to include personal information. Industry information is clickable and leads to a list of employees who work in that area.
5. **Skills:** Attorneys enter their own skills and experience in the directory and are encouraged to contribute to their profiles, following a set of professional guidelines. Business Development created the taxonomy of skills, working closely with each practice group to ensure the choices covered the appropriate breadth and specificity of knowledge in each group. This helps ease use of this tool, because attorneys immediately see the right subset of skills for their area.
6. **Suggest Skills:** Supervising attorneys can suggest skills for junior attorneys' profiles, which also helps make profiles more robust and complete. Any suggestions are reviewed by both the attorney and the practice group leader before being added to the profile.

Partner Dashboards

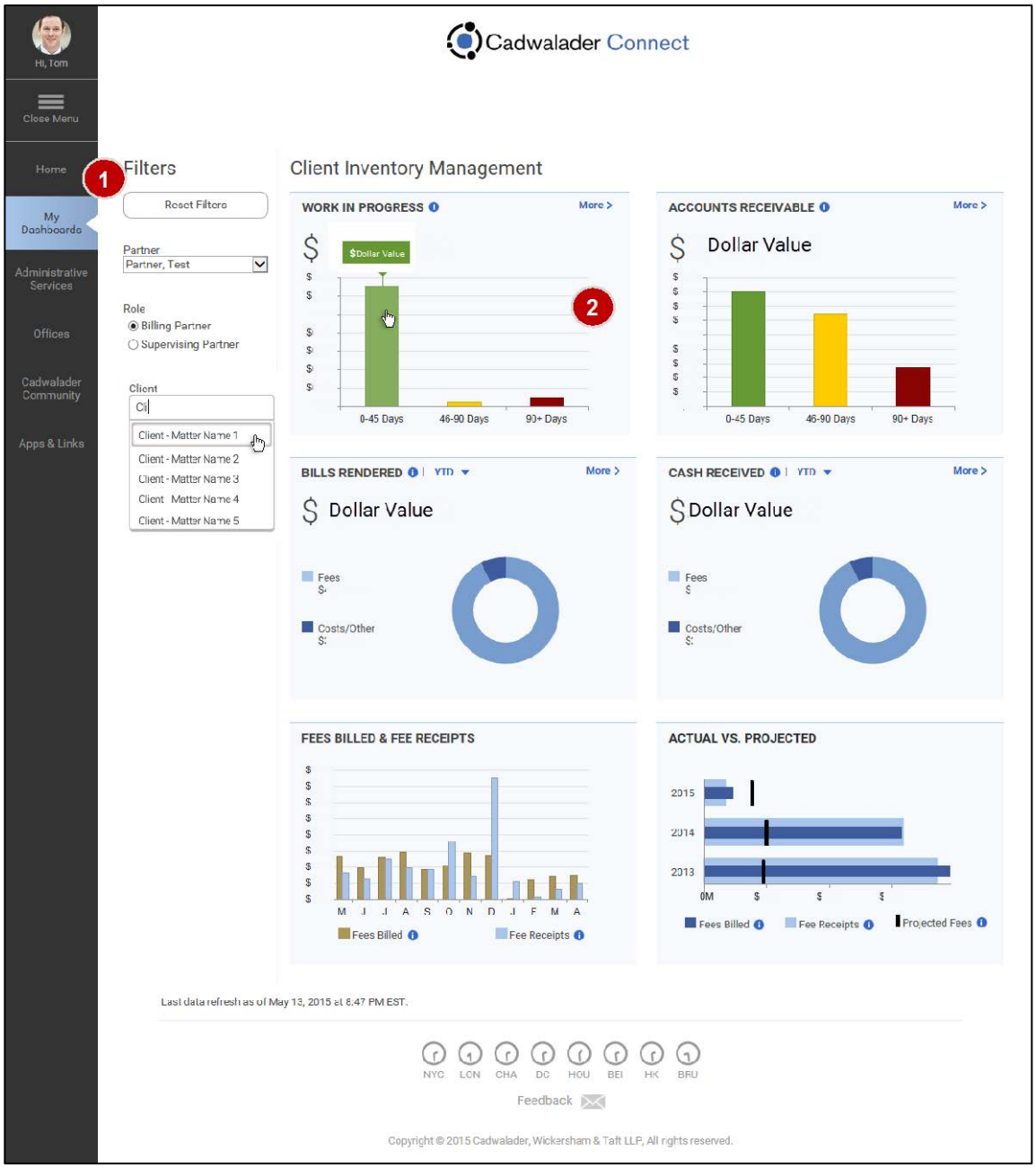


Image 6. Cadwalader, Wickersham & Taft Intranet: Partner Dashboards. *13_Cadwalader_06_DashboardInventory_live.png*

Partner Dashboards Highlights

1. **New Feature:** Partner dashboards are a new site feature meant to give partners ready access to current information about client accounts and activity on ongoing matters. The information is updated nightly and pulled from the Firm's financial platform.

This is a great example of understanding the needs of a particular organization when designing an intranet. Although many intranets are quite similar in providing HR information or employee profiles, where intranets can really excel is in supporting their particular employees and the work that they do.

In this case, it is essential that partners are aware of client billing, receipts, and progress.

2. **Visualizing Results and Progress:** Team members crafted eight personas as part of the partner dashboard project, through interviewing stakeholders and mapping the organizational structure of the Firm. They used this data to determine which summary level information was most important. From there, they sketched and diagrammed data charts and determined which users had permissions to see which sets, and which filters would be available to each role to manipulate the data.
3. **Filters:** Tools on the side of the page allow viewers to view by partner, role, client, or matter name.

Content Pages

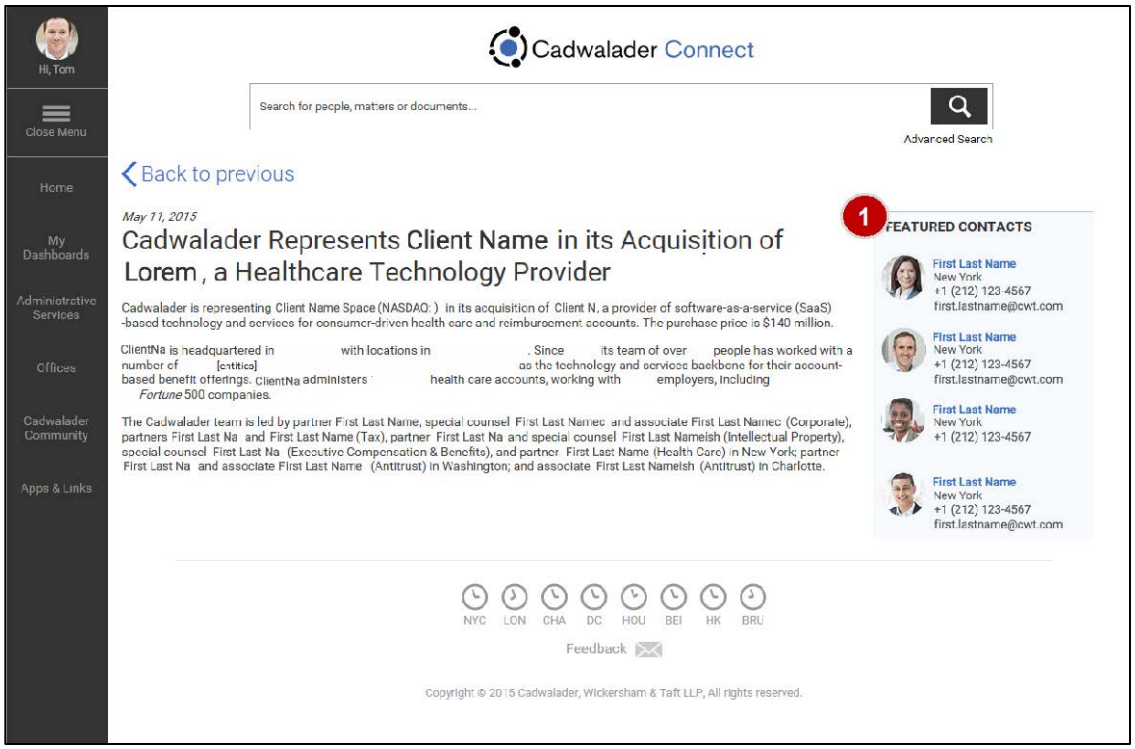


Image 7. Cadwalader, Wickersham & Taft Intranet: Content Page.
14_Cadwalader_07_Article_live.png

Content Page Highlights

1. **Supporting Connections:** Even content pages work to connect employees to one another. For any news item on the site, anyone featured in the article is also listed on the side of the page. This further facilitates connections throughout the organization, as seeing more details about a featured person are just a click away. By presenting the contact information on the same page as the story, rather than simply linking the name in the story's text to the profile, the reader can connect a face to a name.

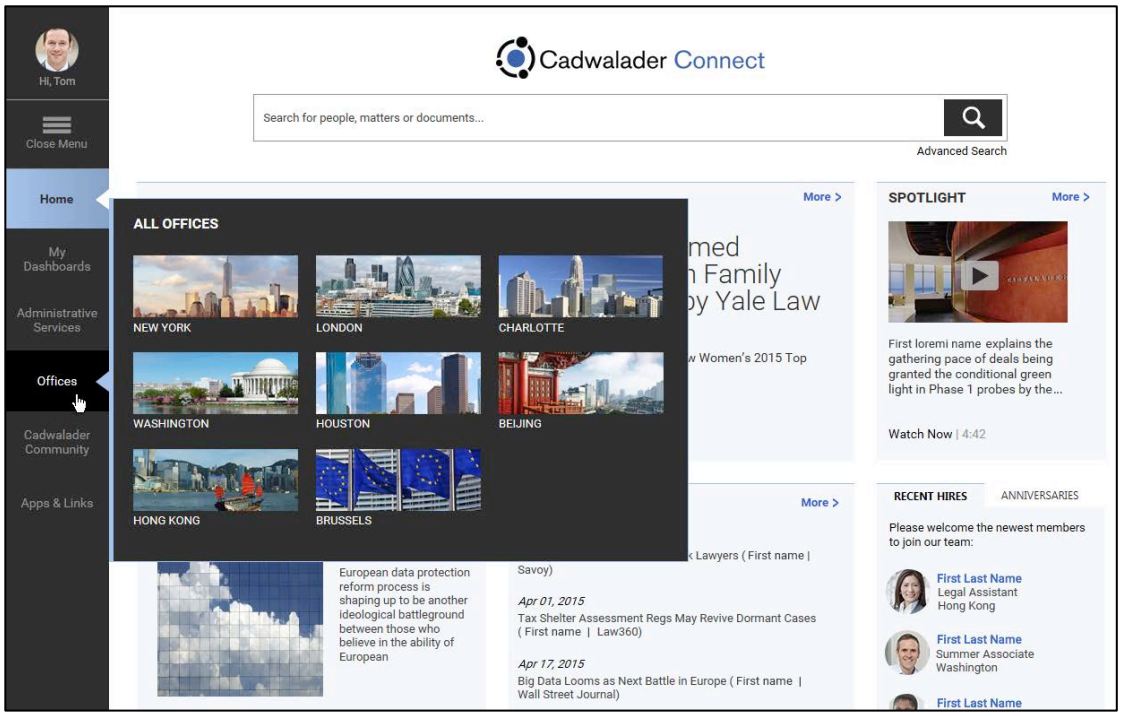


Image 8. Cadwalader, Wickersham & Taft Intranet: Megamenu. An example of the megamenu navigation on the Cadwalader intranet, where office images appear on hover. *15_Cadwalader_08_Navigation_live.png*

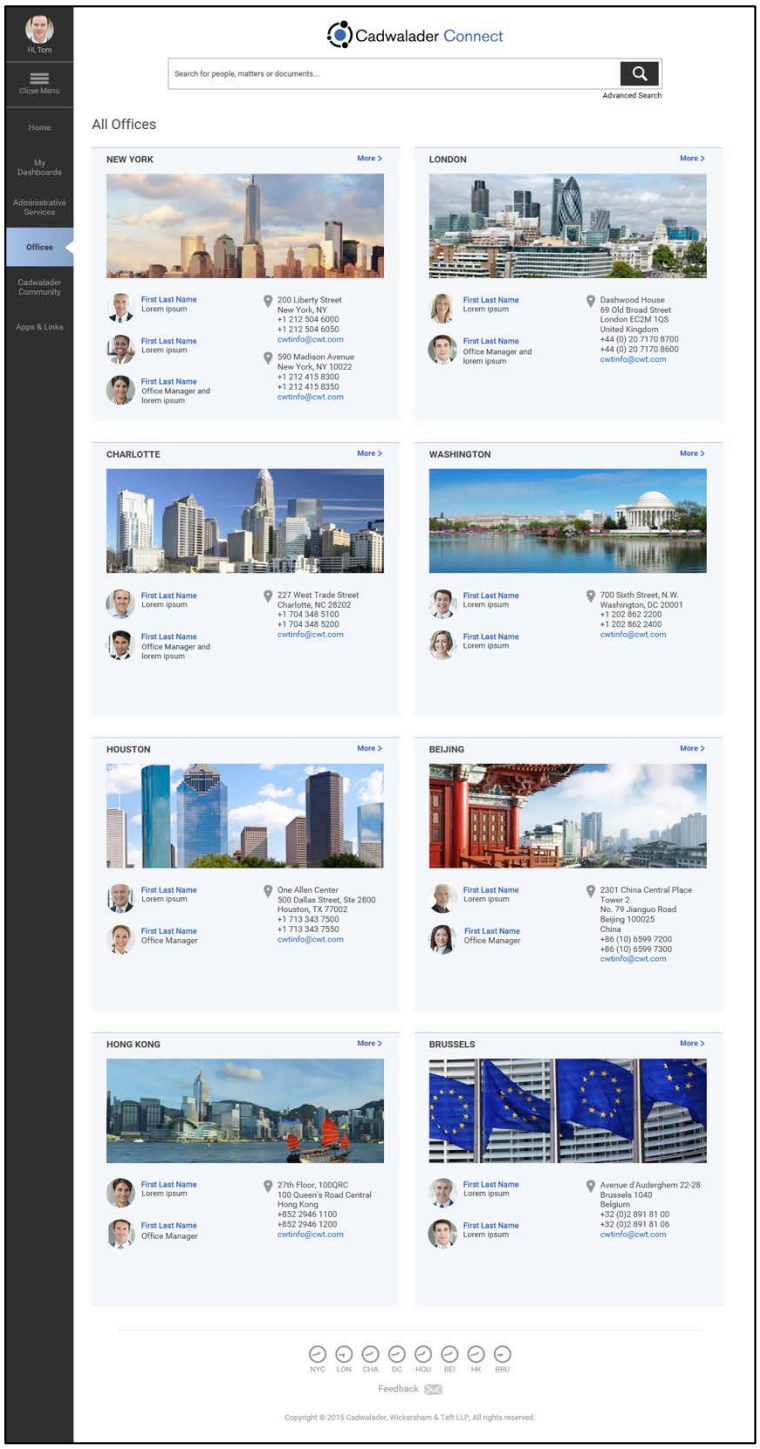


Image 9. Cadwalader, Wickersham & Taft Intranet: Office Landing Page. Landing page for all Cadwalader offices, with quick links to key office contacts, address information, and navigation.
16_Cadwalader_09_OfficeLanding_live.png

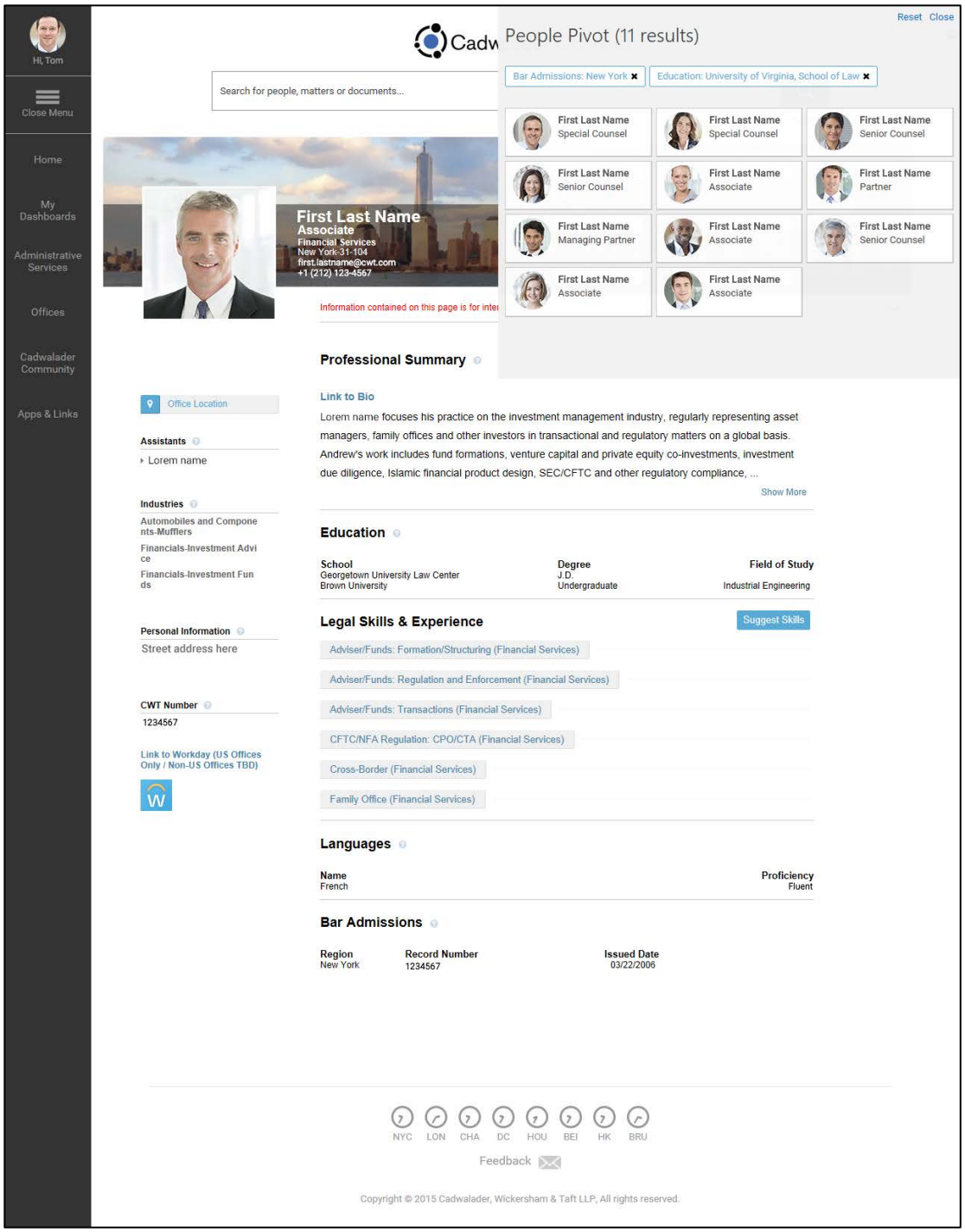


Image 10. Cadwalader, Wickersham & Taft Intranet: People Pivot.
Visual filtering capability within the Firm directory.
17_Cadwalader_10_Firm_Directory_People Pivot.png

DESIGN PROCESS AND USABILITY WORK

The work of the intranet project team focused on three major efforts, with the focus of each being to improve the user experience:

- **Overhaul design:** Redesign, refurbish, and update the entire intranet.
- **Improve search:** Develop an enterprise search function that would make the Firm's knowledgebase more easily accessible to all users from a single entry point.
- **Develop partner dashboards:** Create, design, and integrate the partner dashboards, which were to be a major new feature for the Firm's partners.

Research Approach

With these goals in mind, the team began working with Door3 to accomplish a series of activities that would help them achieve these objectives. These activities included:

- **Field studies:** Door3 interviewed stakeholders to obtain high-level feedback and direction. During these sessions, stakeholders discussed their intranet experiences and the team gathered feedback on how to improve it.
- **Usage stats and server logs:** The Door3 design team leveraged the Cadwalader IT team's knowledge of site traffic patterns and popularity of content and pages in order to help them make informed decisions about pages and content to update, delete, or create on the new intranet.
- **Expert reviews:** The Door3 design team reviewed the existing intranet to identify both its strengths and challenges, specifically focusing on the user experience.
- **Other companies' intranets:** The internal design team met with Cadwalader stakeholders and reviewed a range of existing intranet designs available via books, reports, and the 2014 NN/g Intranet Design Annual. The team discussed usability, design, and architecture and obtained Door3's views on what worked well (and did not work well).
- **Content requirements and design:** Cadwalader provided business requirements to the Door3 design team, which then reviewed and identified content that should be carried over to the new intranet. Door3 sketched low-fidelity diagrams to illustrate and document the content that should be retained, deleted, or created.
- **User persona workshop:** The internal team reviewed the eight personas created during the partner dashboard design phase (see below) to make sure they were still accurate and to see if there were any other personas that needed to be taken into account for the intranet redesign. Then the team reviewed the various technologies to be employed with the development team.

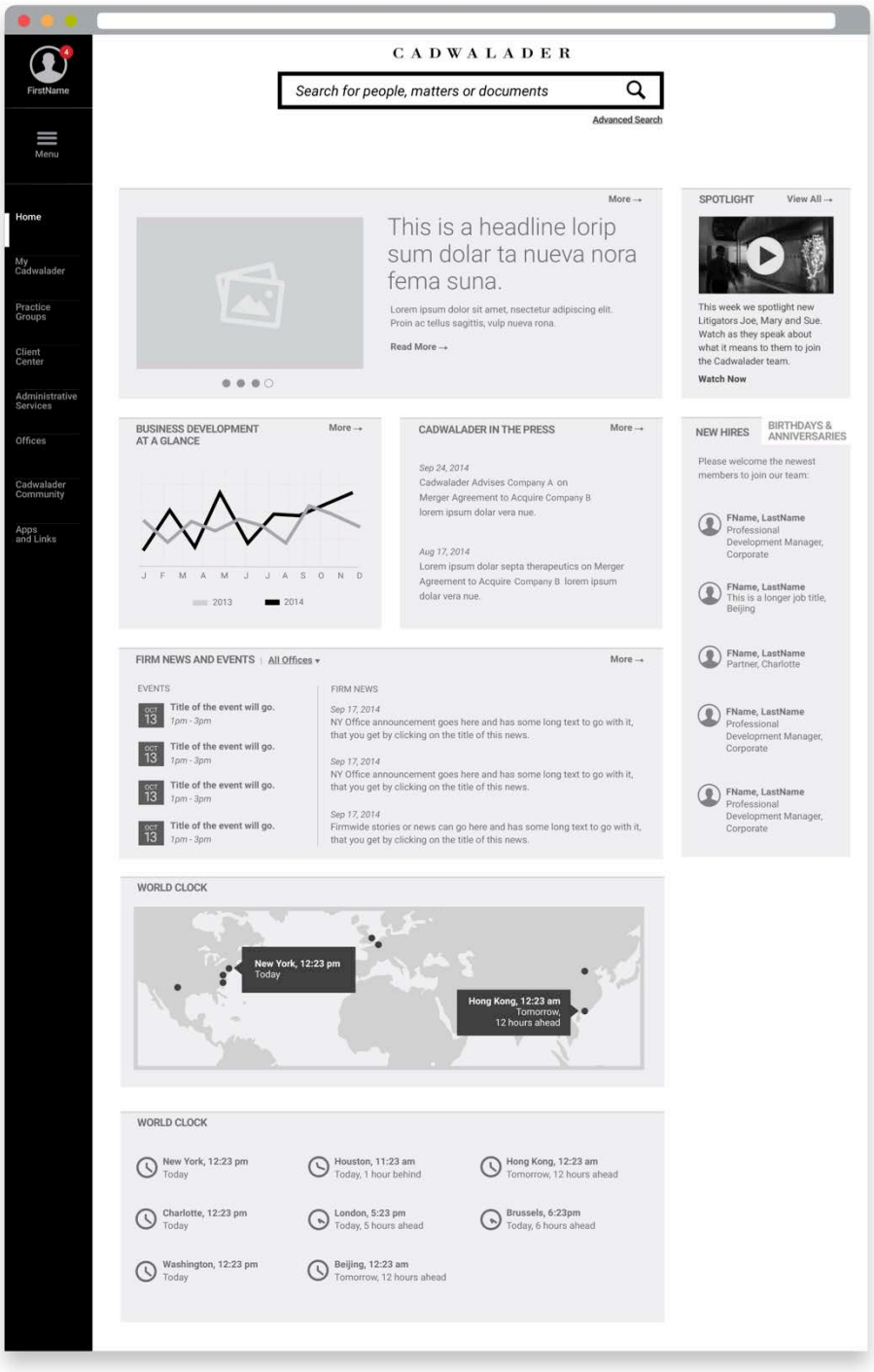


Image 11. Cadwalader, Wickersham & Taft Intranet: Homepage Wireframe. High-fidelity wireframe of the new intranet homepage. *18_Cadwalader_11_IntranetWireframe.png*

Designing Search

The intranet project team worked with the Firm's Knowledge Management Initiative Team to develop the enterprise search capability. Together, the two teams accomplished the following:

- **Scoped out the desired functionality**, including the internal data sources to be included, the ways in which those sources would be accessed and indexed, and how results would be presented.
- **Ensured that appropriate data protection and confidentiality** would be maintained for data sources indexed and made available through enterprise search. This ensured the appropriate level of protection for data subject to client or third-party confidentiality restrictions as well as for the Firm's internal confidential data.
- **Investigated, tested, and compared various search engine technologies** in order to determine the best functionality and fit for the intended purpose.
- **Implemented the enterprise search** based upon the Recommind search engine.

Designing the Partner Dashboards

For the development of the partner dashboards, the Dashboard Project Team set aside two weeks of discovery workshops to accomplish the following design activities:

- **User persona workshop:** The partner dashboards were to be permission-based, with different levels of role-based viewing. The Dashboard Project Team mapped the entire organizational structure, departments, and practice groups and identified eight distinct personas representing all of the user types.
- **Stakeholder interviews:** The Dashboard Project Team interviewed stakeholders to better understand and identify what summary-level data would be most important for users to review and use.
- **Iterative design sketches:** The Dashboard Project Team collaboratively sketched and diagrammed during a series of workshops. This process helped team members figure out how the data was going to be visualized as charts, where users could see what sets of data and filters would be available within each role so they could manipulate that data.
- **Wireframes:** After the research was complete, Door3 created low-fidelity wireframes to help begin to give structure to the partner dashboard design and worked through several wireframe iterations.
- **Visual design:** Once the wireframes had reached a high level of fidelity, Door3 moved into the visual design phase by adding color coding to the data and finalizing the overall look and feel of the design.

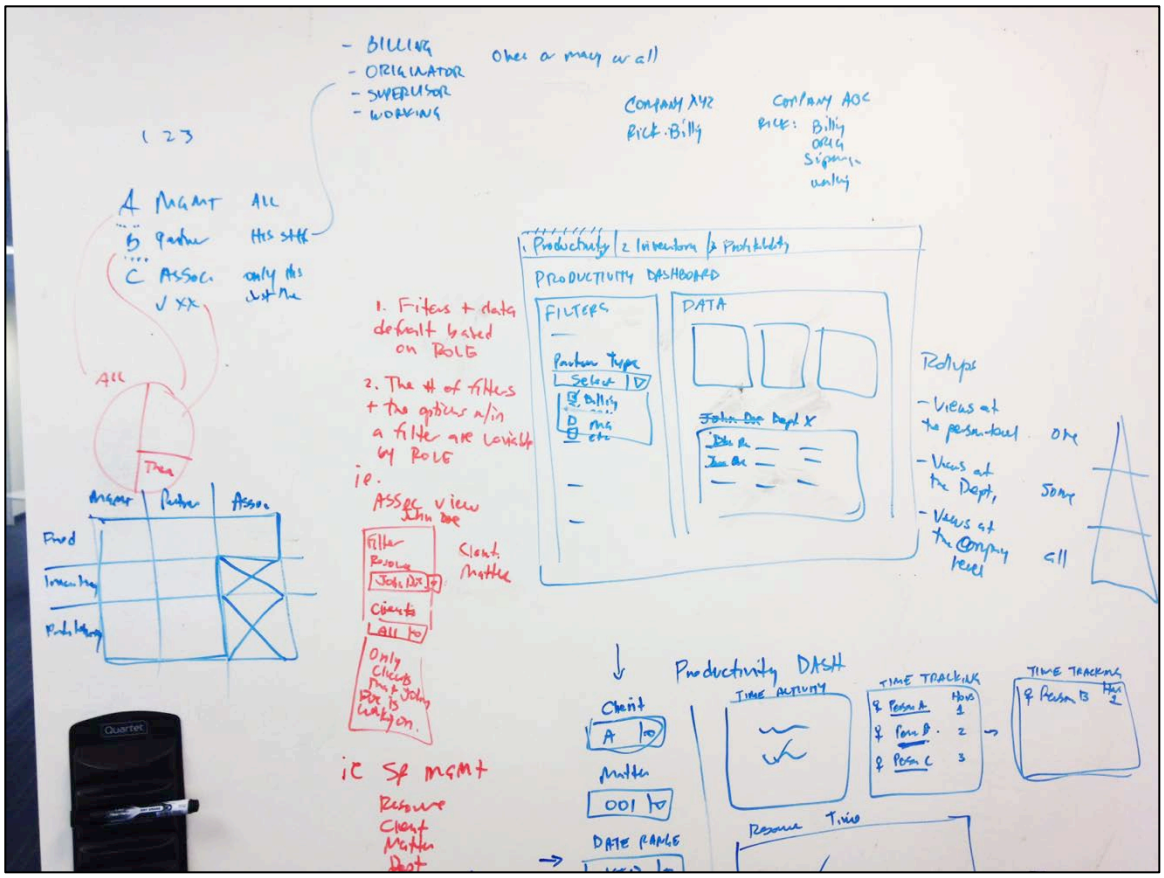


Image 12. Cadwalader, Wickersham & Taft Intranet: Whiteboard Session. This helped the team figure out the structure of the partner dashboards, which are a key part of the intranet.
19_Cadwalader_12_BIDashboardSketch.png

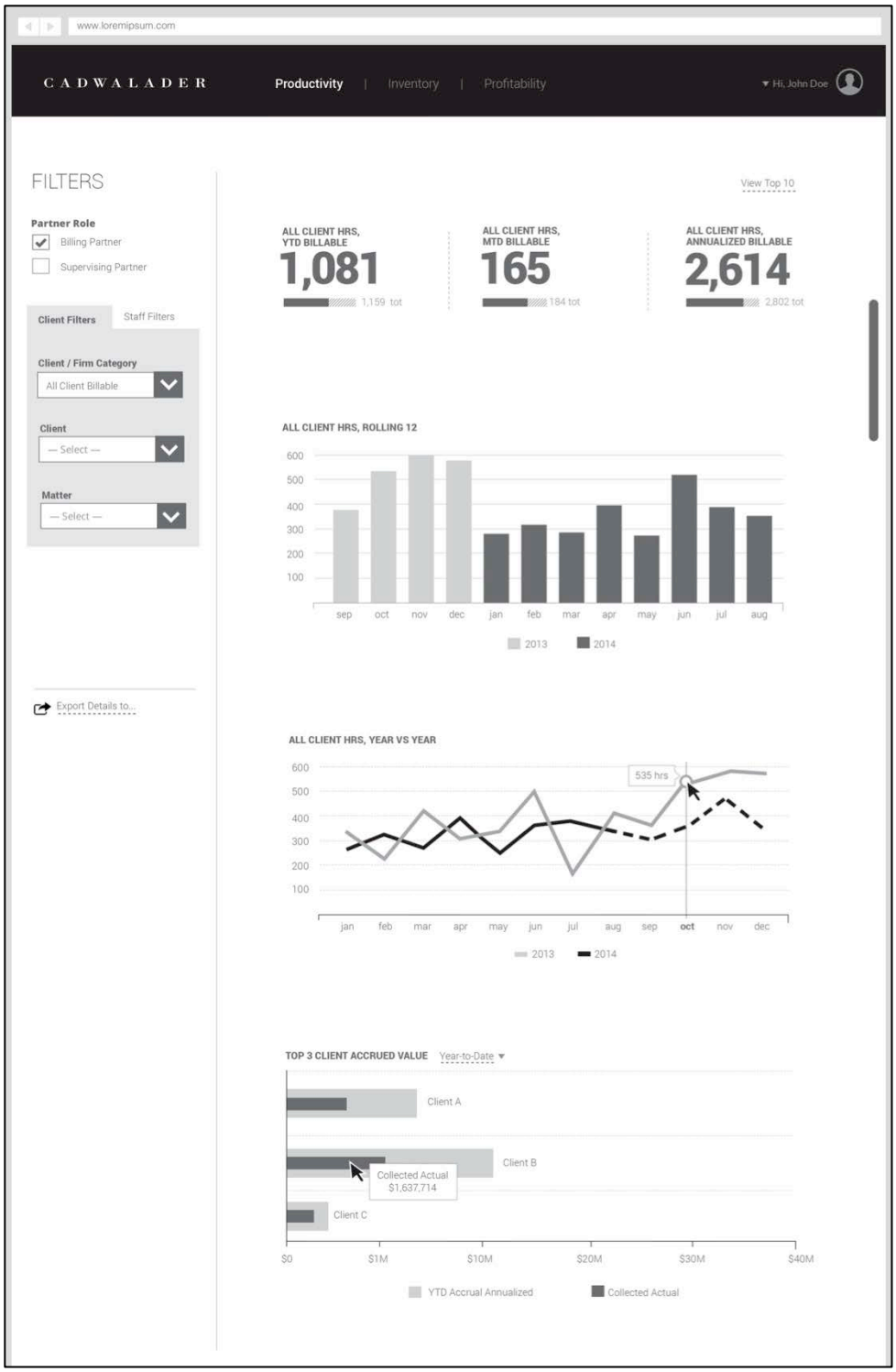


Image 13. Cadwalader, Wickersham & Taft Intranet: Early Wireframe.
This early wireframe of the partner dashboard shows work value data.
20_Cadwalader_13_BIWireframe.png

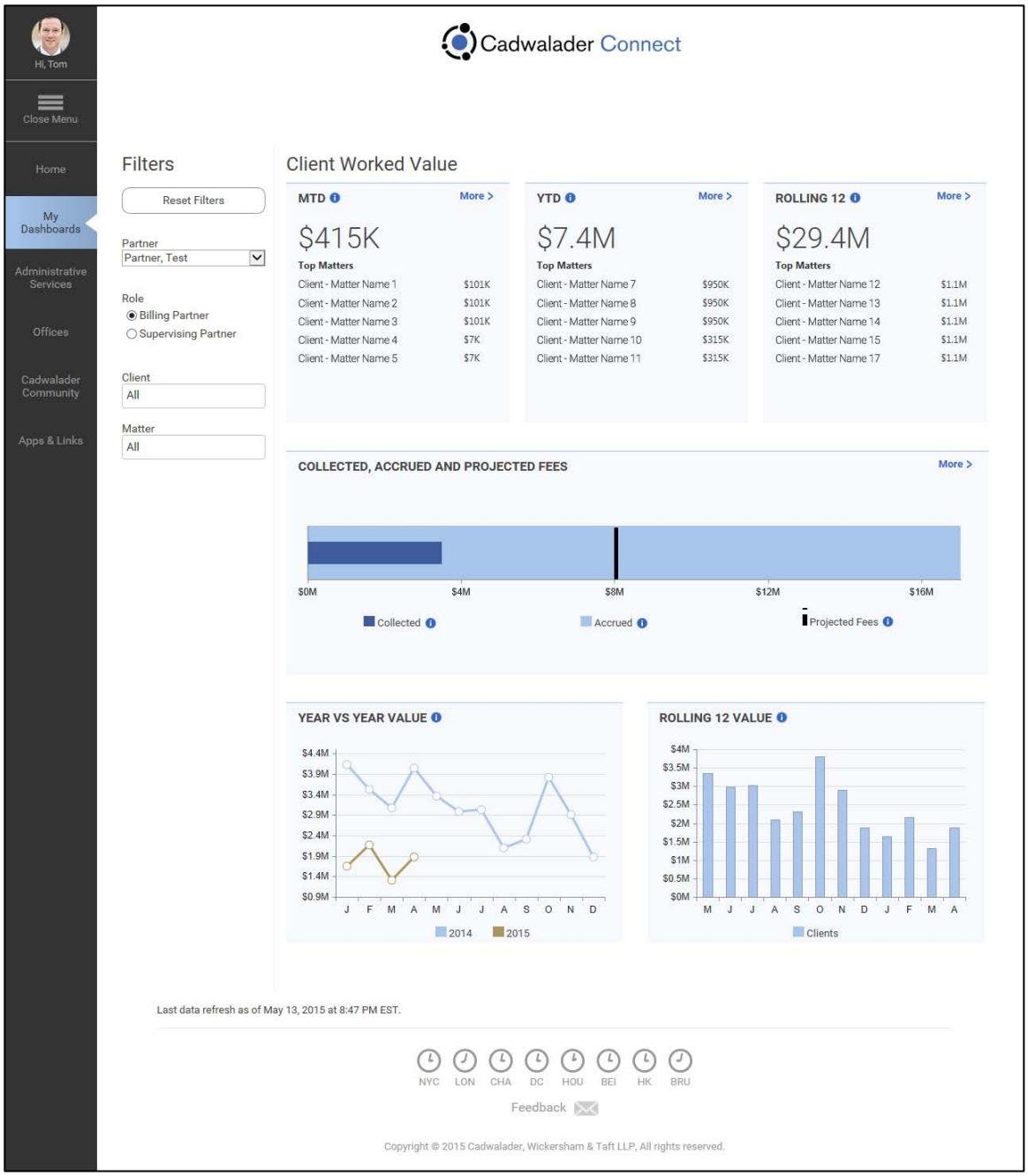


Image 14. Cadwalader, Wickersham & Taft Intranet: Partner Dashboard. The partner dashboard lets Cadwalader partners view up-to-date information on clients and matters.
21_Cadwalader_14_DashboardValue_live.png

Designing the Information Architecture

IA was an important consideration for the design team, and thus one of the goals of the project was to restructure the IA with a focus on connectivity and interactivity. The need to develop and integrate Recommind as the enterprise search engine as

well as the new partner dashboard functionality created some unique challenges; however, the team rose to the occasion. Some of the problems solved with the IA include:

- **Cross-reference documents and people:** One of the primary knowledge management objectives that the design set out to accomplish was to give Cadwalader employees immediate access to the available documents, matters, and resources, cross-referenced if needed, within the Firm's systems. In order to improve findability, a decision was made to prioritize and emphasize the search bar in the most prominent way possible. From there, users could quickly search, in a number of combinations, for people, matters, or documents. An advanced search feature was also developed and the existing people finder capabilities were also greatly expanded, allowing users to quickly find colleagues and then click into their profiles to view an expanded description of their background skills and experience.
- **Protect confidentiality:** At the same time, bearing in mind the sensitivity of information included in the various systems, it was vitally important to ensure that appropriate confidentiality restrictions would be enforced. Out of necessity, this required the ability to restrict the delivery of search results to some users when they are not authorized to view all of the information that is otherwise responsive to their searches.
- **Simplify architecture:** The design team was also able to structure the entire intranet on just five templates (home, category landing, detail page, content, and search results/search drop-down). By reducing the number of page templates, the site provides a consistent experience regardless of the page on which users land. Megamenus were utilized so that users are able to get a sense of the depth of content sections quickly and easily. The menus open on hover, and the team relabeled all sections so that they are clear and consistent with how the various Firm departments and practices speak about and understand the structure of the Firm. The Firm had also continued to expand globally since the previous intranet was developed, opening additional offices overseas, so the new intranet needed to reflect these new offices and also provide a sense of the global community. From within the megamenu, users can visually see a reflection of these offices, their resources, and their people.

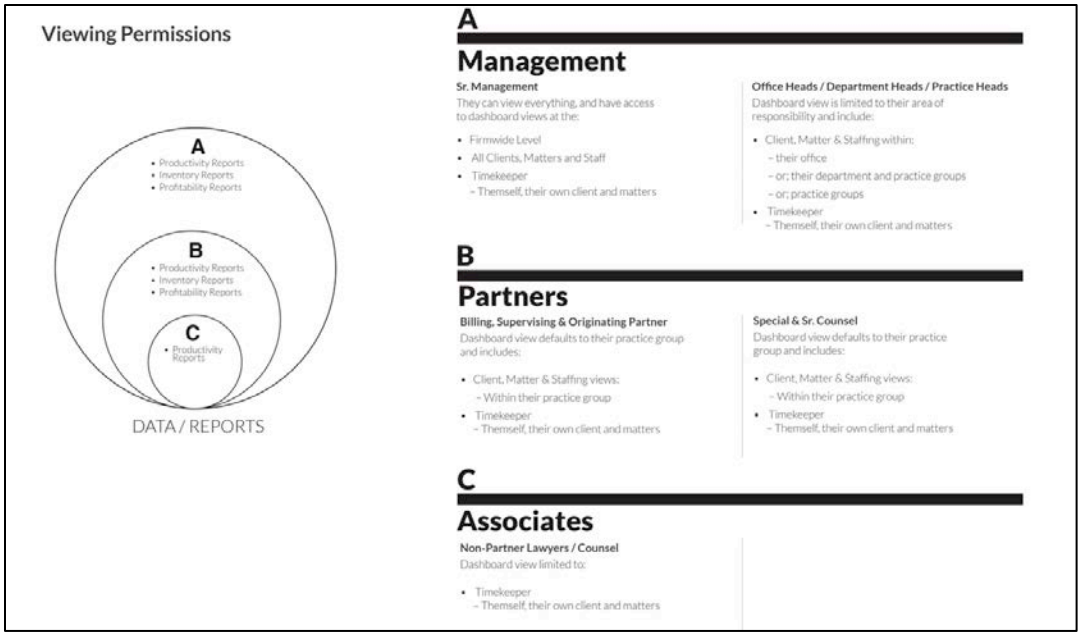


Image 15. Cadwalader, Wickersham & Taft Intranet: Permissions Diagram. This diagram was used to illustrate role-based viewing permissions across the Firm. *22_Cadwalader_15_PermissionsDiagram.png*

IA Design Process

The IA design process, like other aspects of the intranet design project, consisted of iterative user-based methods aimed at achieving the best possible design to meet the project goals. These included:

- **Collaborative sketch sessions:** Based on the discovery research, the project team compiled enough information to collaboratively sketch out potential intranet architectures. With various Cadwalader stakeholders present, Door3 was able to take into account the outside applications that needed to be folded into the process, including partner dashboards, existing content, and any new content that needed to be created.
- **Sitemap:** With a loose architecture sketched out, Door3 created a more formal sitemap that expressed the intranet's new organization. This was presented and iterated against until agreement was reached on a final structure.
- **Wireframes:** With the architecture in place, Door3 drew five primary templates that could accommodate content across the site. The agency then began the process of developing high-fidelity wireframes for the identified pages, iterating to the point of the highest fidelity wireframe.
- **Visual design:** Once the wireframes reached a high level of fidelity, the team moved into visual design stage to create the overall look and feel of the site.

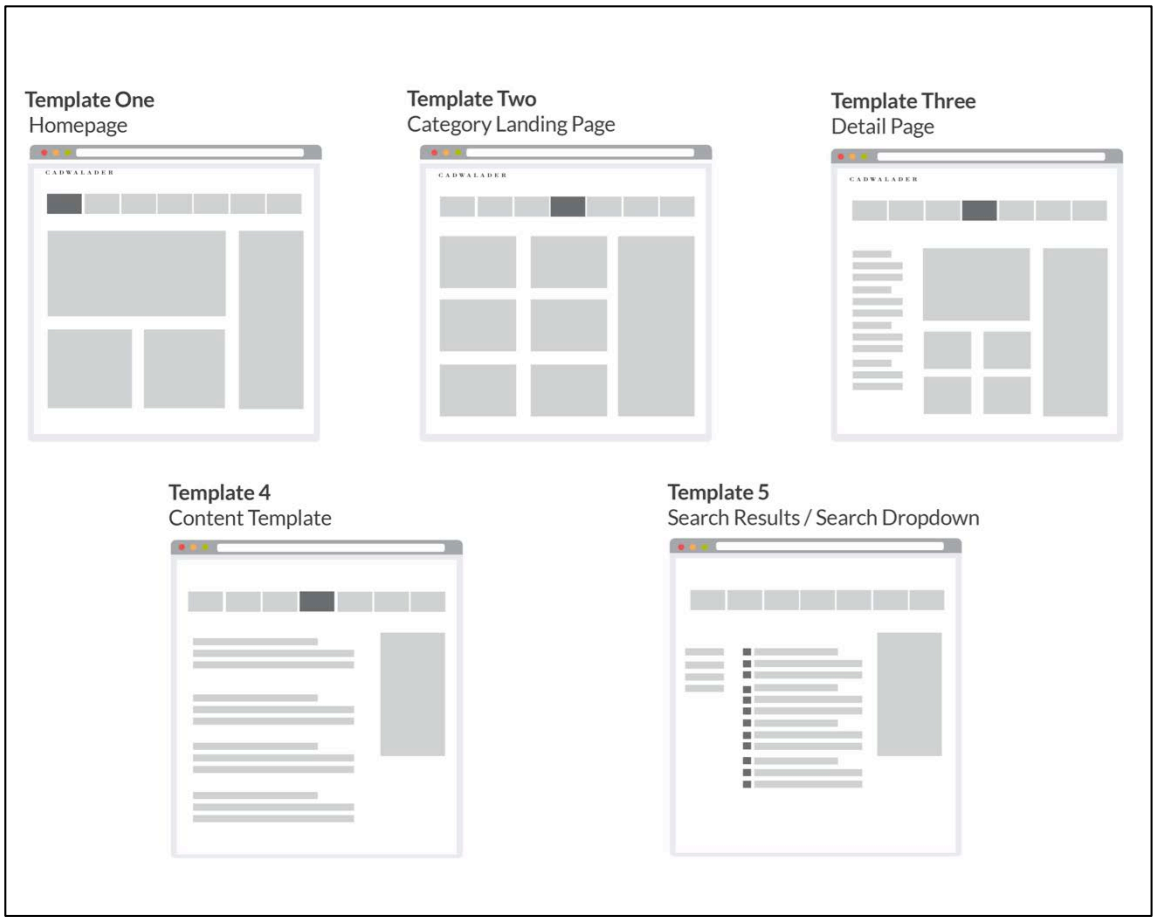


Image 16. Cadwalader, Wickersham & Taft Intranet: Primary Page Templates. The layout of the low-fi wireframes that defined the intranet's five primary page templates. *23_Cadwalader_16_PageTemplates.png*

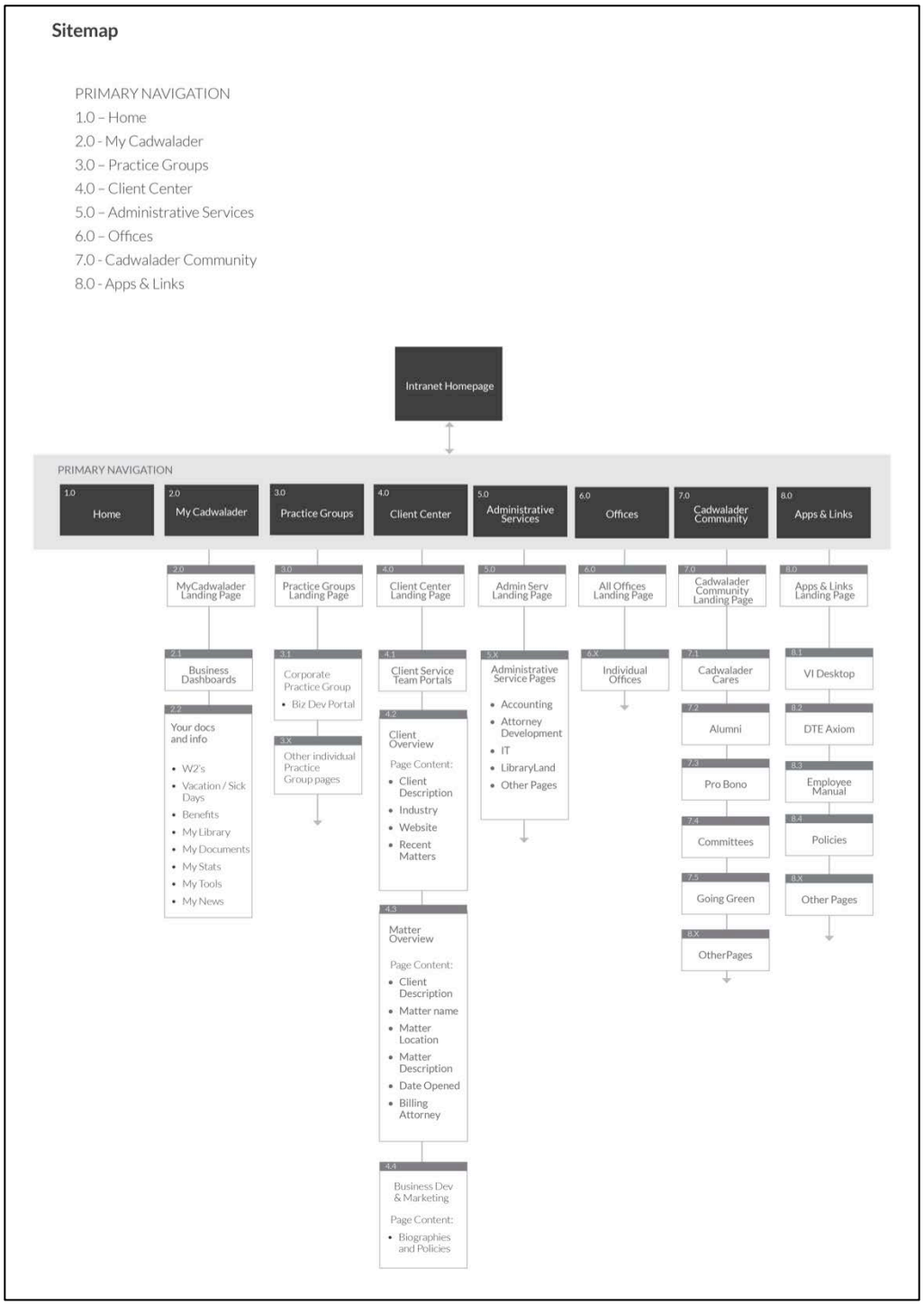


Image 17. Cadwalader, Wickersham & Taft Intranet: Sitemap. A proposed work-in-progress sitemap showing the potential high-level architecture of the new intranet. *24_Cadwalader_17_IntranetSitemap.png*

Adoption and Buy-In

The project team wanted a way to ensure that the Firm's users were focused on what was new about Connect. In order to accomplish that, team members implemented a self-guided walkthrough using a jQuery plug-in tool that let them take control of how people interact with Connect. They also launched an internal marketing campaign that included internal communications, signage, open houses, group meetings, and one-on-one training sessions.

On an ongoing basis, the Firm uses this tool to highlight new functionality as it is rolled out and maximize awareness of new features.

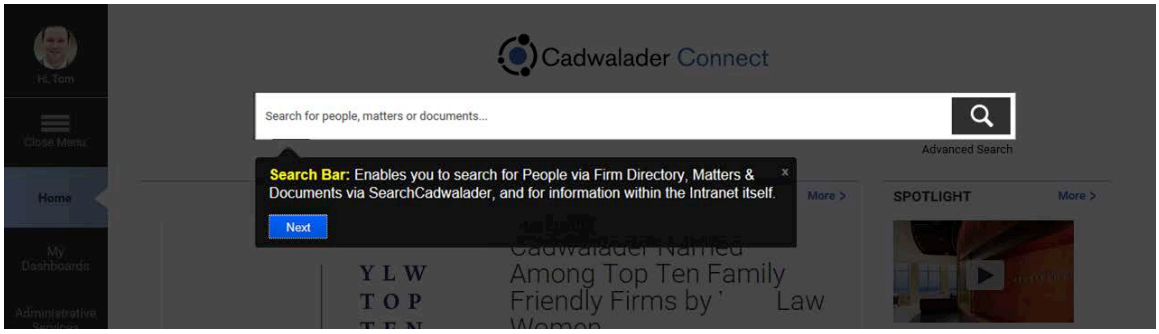


Image 18. Cadwalader, Wickersham & Taft Intranet: Self-Guided Walkthrough: This image and the one below illustrate how the team uses a jQuery tool to provide interactive walkthroughs, which are used to highlight new features of Connect. *25_Cadwalader_18_JoyRideSearch.png*

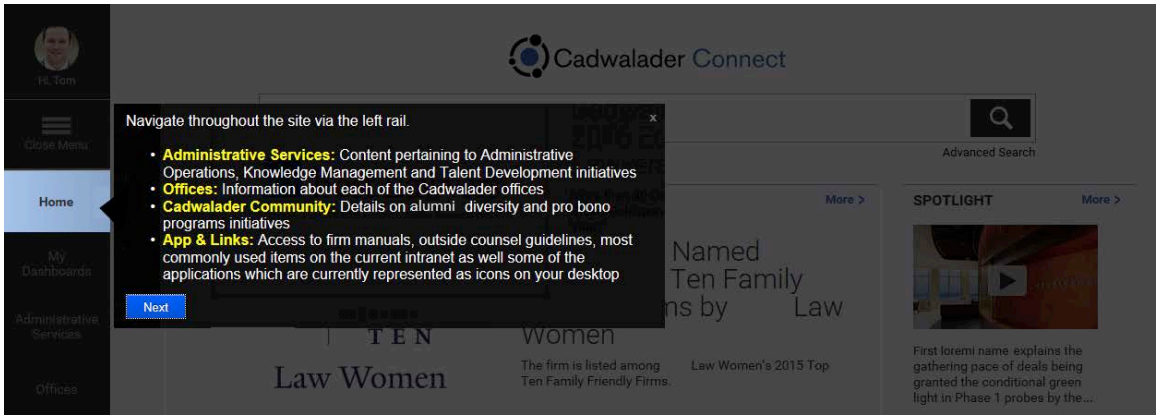


Image 19. Cadwalader, Wickersham & Taft Intranet: Self-Guided Walkthrough. The Cadwalader intranet provides self-guided feature walkthroughs to highlight new features on Connect. *26_Cadwalader_19_JoyRideNavigation.png*

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
door3 A user experience design and research consultancy	• Designed the user interface, dashboard, and IA • Conducted workshops, interviews, sketching and wireframing exercises, and card sorting exercises
DBI Strategies A professional services firm	• Provided resources for business analysis and requirements documentation, and QA testing

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	• http://connect.cwt.com/
Default Status	• Connect is the default homepage for all users, and they are able to change the default homepage if desired.
Remote Access	• Users are able to access Connect once they are connected to the network; this can be accomplished through Citrix or VPN.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
July 2013	• Knowledge Management Initiative Team makes initial proposal
August 2014	• Partner dashboard discovery sessions commence with Door3
October 2014	• SharePoint 2013 discovery sessions commence with Door3
May 2015	• Partner reporting dashboards released to the Firm's partners
July 2015	• New intranet, Connect, released Firm-wide
Overall redesign time frame: Connect was branded, designed, developed, and deployed with new content in less than 12 months.	

CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Ownership	• Content ownership is decentralized, so each site within Connect has a designator owner who is responsible for the maintenance of that particular site. • The Firm created an Intranet Advisory Council to assist in the launch phase of the project to discuss priorities, user feedback, and content ideas. This group initially met every week prior to launch, and will continue to meet regularly to help drive the strategy and direction of Connect.
Workflow	• For homepage content, the Intranet Project Team implemented an approval workflow system for the administrator to review and approve content. Content on the homepage is vetted by the Business Development, Marketing and Communications Department before it is posted.
Training	• Members of the Intranet Project Team train each content owner one-on-one. The Firm also built a wiki that walks content owners through the process of managing their own content.
Maintaining Quality	• There is a feedback link at the bottom of each page on Connect. As feedback is entered, the Intranet Project Team reviews and evaluates the feedback for future inclusion on the intranet.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• VMWare (Virtual Machines), Windows 2012 Servers
Bug Tracking/Quality Assurance	• SharePoint Issues List
Design Tools	• InDesign, UXPin, Balsamiq
Site Building Tools	• SharePoint 2013
Content Management Tools	• SharePoint 2013
Search	• Microsoft FAST, Recommind Decisiv Search
Other Functions	• Neudesic Firm Directory • Handshake — SharePoint integration • 9 Dots — Financial Systems Cube

RESULTS AND ROI

The Firm leverages comprehensive metrics around intranet usage to drive further training, communication, and development efforts. The team has monitored the most frequently accessed areas of Connect and now drives the most high-value content, such as internally produced videos, to those high-traffic areas to ensure maximum exposure.

The Firm also proactively analyzes the hard metrics in order to identify underutilized offices/practices and provide service and training.

LESSONS LEARNED

Design team members share some lessons learned from the intranet redesign:

- **Focus on users through iterative design.** "We focused on an MVP [minimum viable product], which allowed us to get a product out quickly and organically drive future development based on user feedback, rather than spending years gathering input on requirements. Going into the project with this mindset allowed us to have a flexible foundation, which allowed us to more quickly respond to user feedback and changes in business demands. It also helped to ensure that the Intranet Project Team focused on improvements and additions that were responsive to the needs of actual users as prioritized by the entire user population rather than those that are anticipated by the Intranet Project Team or only pilot users."
- **Hire experts, as needed.** "Working with a third-party design firm was instrumental. This is a skillset most organizations do not have in-house, and user expectations have advanced to the point where elegant and effective design is critical to adoption."
- **Don't take training for granted.** "We provided a dedicated team to help train users on Connect and reinforced that team with regional support to help train and socialize Connect within our various offices."
- **Involve stakeholders from across the organization.** "Incorporating stakeholders from outside of IT is critical. Seeking input from business units from across the Firm helped us to meet our goal of collaboration and ensured we were building a sustainable system to meet business needs for various audiences across the globe."

The Co-operators Group Limited

OVERVIEW

COMPANY

The Co-operators Group Limited is a Canadian-owned co-operative with more than $40 billion in assets under administration. Through its group of companies, it offers home, auto, life, group, travel, commercial, and farm insurance, as well as investment products. The Co-operators is well known for its community involvement and its commitment to sustainability. The Co-operators is listed among the 50 Best Employers in Canada by Aon Hewitt; Corporate Knights' Best 50 Corporate Citizens in Canada; and the Top 50 Socially Responsible Corporations in Canada by Sustainalytics and Maclean's magazine.

Headquarters: Guelph, Ontario, Canada

Company locations: The Co-operators has 688 locations across Canada, including corporate offices, agencies, contact centers, and support offices.

Locations where the intranet is used: Every employee and financial advisor at The Co-operators uses the intranet regardless of location or role.

Direct written premium: $3.4 billion

THE INTRANET

Users: The intranet, called *Source*, supports nearly 7,000 employees and advisors across the group of companies. This includes employees in various companies and in corporate, call center, and field roles. Users access the intranet for daily news updates, collaboration, corporate information, HR information, and tools to perform specific work tasks within the organization.

Mobile approach: Users can access Source on a corporate cell phone; however, the site was primarily designed for desktop/laptop. A mobile approach is in scope for future development phases.

Technology platform: Microsoft SharePoint 2013

TEAM

Project VP sponsors: Paul Mlodzik, VP, Marketing and Communications (Business Project Sponsor); Mike Kavaner, VP, Solution Delivery (IT Project Sponsor)

Project directors: Barb Stephens, Senior Director, Corporate Communications; Timothy Somerville, Director, Web Marketing (former employee)

Project operating group: Tim Gapakov, Project Manager; Andrea Crane, Business Communications Lead; Shannon Hilker, Web Marketing Project Lead

Cross company business communications: Michelle Missere, Communication Plan Lead; Nathalie Joyal, Translation Lead; Line Donald, Translation Lead; Nick Jones, Content Writer; Julia Toth, Communications Support; Vanessa Iacocca, Web Publisher; Karen Vuong, Web Publisher; Cheryl Cotterhill, Sovereign Business and Technical Lead; Jayne Russell, CGL Business Lead; Shannon Patton, CLIC and CUMIS Business Lead; Lindsey Seip, HB Business Lead; Kimberly Hutchison, HB Business Lead; Glenys Rodwell, Federated Business Lead; Amy Kristensen, TIC Business Lead; Nancy Rooney, CGIC Business Lead; Dana Arous, Field Lead; Tamara Mukandi, Field Lead; Yvonne Grant, Web Marketing Specialist (former employee); Stephanie Harris, HR Business Support; Luisa Lago, Promotion Campaign Support; MaryLou Schaefer, Promotion Campaign Support; Heather McCann, Promotion Campaign Support

Development: Carrie Norman, Business Analyst; Lisa Gauthier, Senior Business Systems Analyst; Milan Taran, Business Systems Analyst; Anthony Runstedler, Developer; Adriana Banica, Developer; Nashid Forbes, Developer; Jamal Zaghit, Developer; Tanveer Hassan, Solutions Architect; Xiaobo Liu, Technical Web Support

INTRANET TEAM



Team members shown here (left to right, top to bottom): Tim Gapakov, Nashid Forbes, Nick Jones, Carrie Ann Norman, (name unavailable), Brian Richardson, Adriana Banica, Anthony Runstedler, Jamal Zaghit, Barb Stephens, Hayley Iacocca, Andrea Crane, Shannon Hilker, Michelle Missere, Milan Taran, Vanessa Iacocca, Lisa Gauthier, Karen Vuong, Line Donald, and Marc Séguin.

HIGHLIGHTS ABOUT THIS WINNER

The *Source* intranet connects people and work processes across The Co-operators Group of companies. It does a wonderful job promoting communication, collaboration, and community.

- **Employee Inclusion, Recognition, and Opinion:** Features such as the weekly *Five minutes with…* feature, polls, achievements, and the ability to submit news, help the nearly 7,000 users across Canada feel valued, offer their feedback, and find multiple avenues to get to know one another.
- **Multi-Language:** Because there are both English and French speakers at the organization, Source makes it possible for them to work in either language and even to switch between the two languages easily.
- **Performance and Mission:** Source houses broad company performance figures on a dashboard, corporate strategy and mission information, background about leaders, and much more.

- **Executive Blogs:** Senior leaders take turns writing about topics that are important to the organization. They regularly share their knowledge and opinions and ask employees to do the same.
- **Help:** *SourceBook* provides thorough, wide-ranging guidance about how employees can make the most of Source.
- **Consistency:** The menus and pages are presented in consistent and expected ways. Employees find common elements on article pages and blog pages, on appointments and role changes. The consistent look and feel helps employees acclimate quickly on pages and move effortlessly around the UI.

BACKGROUND

Multiple CMSs, standalone portals, and piecemeal builds had rendered The Co-operators intranet a cluttered "patchwork quilt," rather than an integrated space that met the organization's communication and business needs. The content was not searchable or consistently designed; the technology was outdated and difficult to use; and the content structure encouraged siloed activity rather than collaboration. Users were increasingly asking for enhanced functionality. A rebuild was necessary to develop an intranet that would function as an enterprise-wide collaborative workspace.

The redesign's goal was to provide a common user experience that would connect people and work processes across The Co-operators Group of companies by promoting user-centric communication, collaboration, and community. The company's business goal — to be the leader in client engagement — resulted in one of the project's greatest challenges: to create a single intranet that met the needs of each company and the overall enterprise, as well as the continuously evolving corporate culture.

Based on a 2010 employee survey, The Co-operators team knew that the company's existing intranet ("The Source") was a critical resource for 64% of users, with 84% of users visiting the site more than twice per day to stay informed and perform their jobs.

Although it was a much-needed resource, the intranet was not user friendly. Of the 450 survey respondents, only 52% said they successfully found what they were looking for on The Source.

In 2012, the intranet team received approval to rebuild the intranet, in phases, to create a better user experience; however, it was given limited funds, resources, and time (17 months) with which to achieve its sizeable mission. The team's limited experience with SharePoint 2013 meant that the intranet project also presented a steep technology learning curve.

In 2013, the team created a governance structure and developed the mission, vision, and guiding principles that would support the rebuild project. Once the project scope was defined and business requirements were developed, the project kick-off communication was shared with all employees. Company representative groups were the first to test, validate, and socialize the designs; usability testing was then conducted with employees so the design team could compare the old IA and design against the new. Once testing was complete, a promotional campaign led up to the official launch on May 27, 2014.

DESIGN REVIEW

Homepage (English)

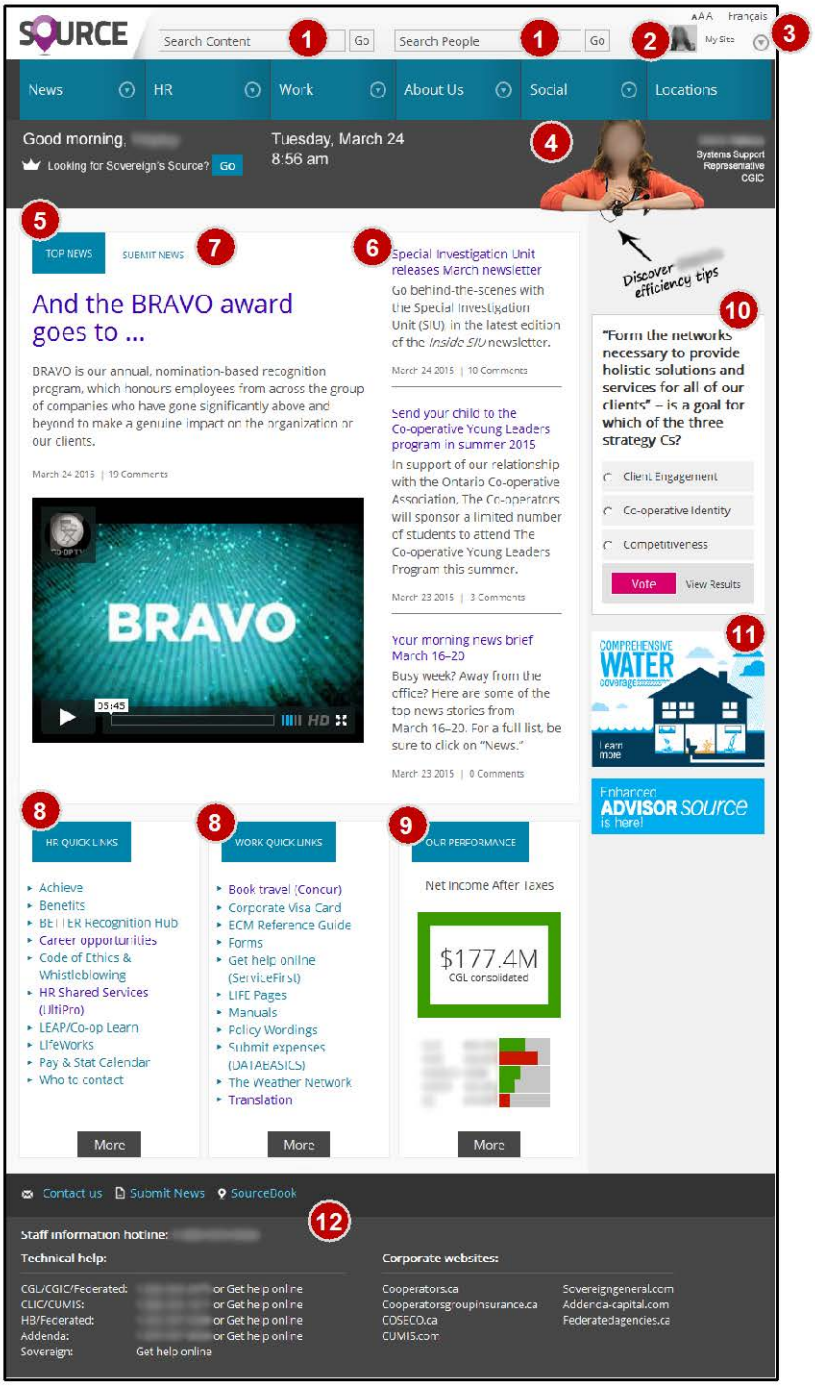


Image 20. The Co-operators Intranet: Homepage (in English).
27_TheCooperators_01_EnglishHomepage_live.png

Homepage (English) Highlights

This homepage packs an impressive amount of powerful and empowering content:

1. **Searches:** Both the site search and the employee search appear at the top of the page, making it very easy for users to access all Source content and information about coworkers.
2. ***My Site*:** The *My Site* link in the upper right gives people access to their personal profile page, which other employees see. Because users have a wide variety of roles — the executive leadership team, corporate staff, insurance and financial advisors in the field, and their support staff — these profile documents are educational for users.
3. **Language Selection:** The *Francais* link offers quick access to the French translation of the intranet. In the French version, that link changes to *English* so employees can easily switch back.
4. **Employee Showcase:** Each week, a different employee is interviewed and profiled on the homepage just below the menu. This *Five minutes with…* feature is an excellent way to help employees get to know one another. Readers can also comment on the profile, which helps employees feel valued and that their work and opinions matter.
5. ***Top News*:** A news item is showcased with a large headline in the first content section on the homepage. This helps people who don't have a lot of time to quickly identify the most important piece of news. The article's publish date is in international format. The number of comments on the article indicates the amount of interest in the topic. A video or image below it provides more information and, as with all news items, users can provide comments.
6. **Other News:** Three additional news items appear in the column to the right of the main item. By scanning the headlines and brief summaries, employees can quickly get a sense of the top corporate news.
7. ***Submit News*:** To generate varied, inclusive, and interesting topics, employees are encouraged to submit corporate news. The *Submit News* link is a visible advertisement for this positive effort.
8. **Popular Links:** Below the news is a list of the most visited intranet sections related to HR and work.
9. **Company Performance:** The *Our Performance* section provides important figures, including for sales and performance. This keeps all employees aware of targets and how well the business is meeting them. Communicating this information serves many purposes, not the least of which is to remind employees about business goals and accomplishments, help make all employees feel proud, and motivate them to collectively work to meet or exceed company goals.
10. **Poll:** A poll, which is updated three times per week, asks employees questions about various corporate and current event topics. This encourages employees to offer opinions, be part of something greater, and see what their colleagues think. It can also help the organization's managers and communicators gauge employee awareness and knowledge about particular topics.

11. **Promotions:** In the right rail under the poll, ad space is reserved for internal promotions. Here, teams can advertise a program or initiative, or help users quickly complete a task with a call to action.
12. **Fat Footer:** Contact information for help, feedback about the intranet, and various other hotlines are readily available in the page footer. This footer area is clearly delineated visually with a dark background juxtaposed against the light page.

Homepage (French)

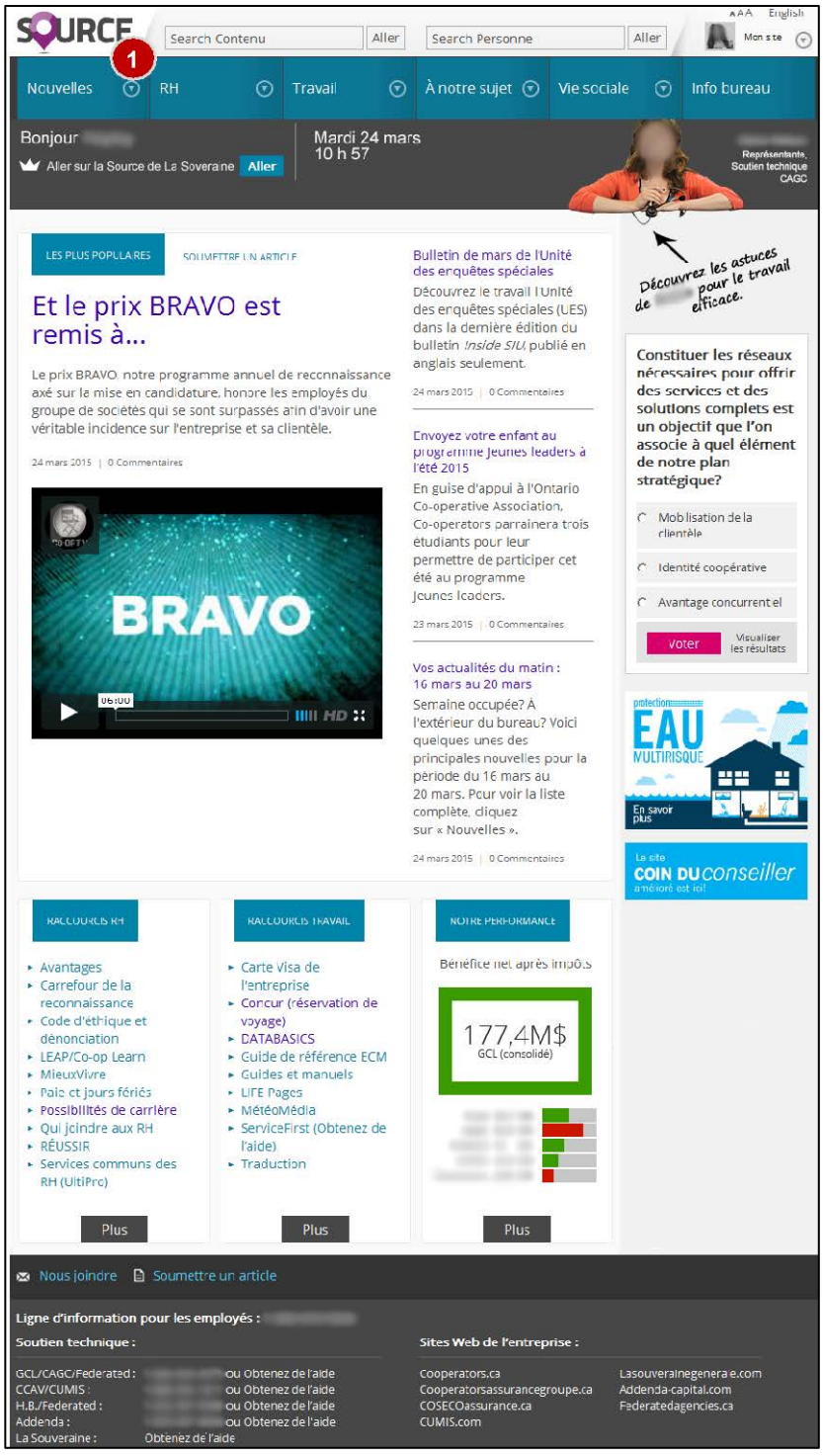


Image 21. The Co-operators Intranet: Homepage (in French).
28_TheCooperators_02_FrenchHomepage_live.png

Homepage (French) Highlights

Because Canada has two official languages, all news articles, polls, profiles, and ads are posted simultaneously in English and French. This helps to ensure that all employees have access to the same information, at the same time, in the language of their choice.

1. **Equal:** Besides the translation, the content, page layout, and look and feel are the same as the English version of the homepage.

My Site

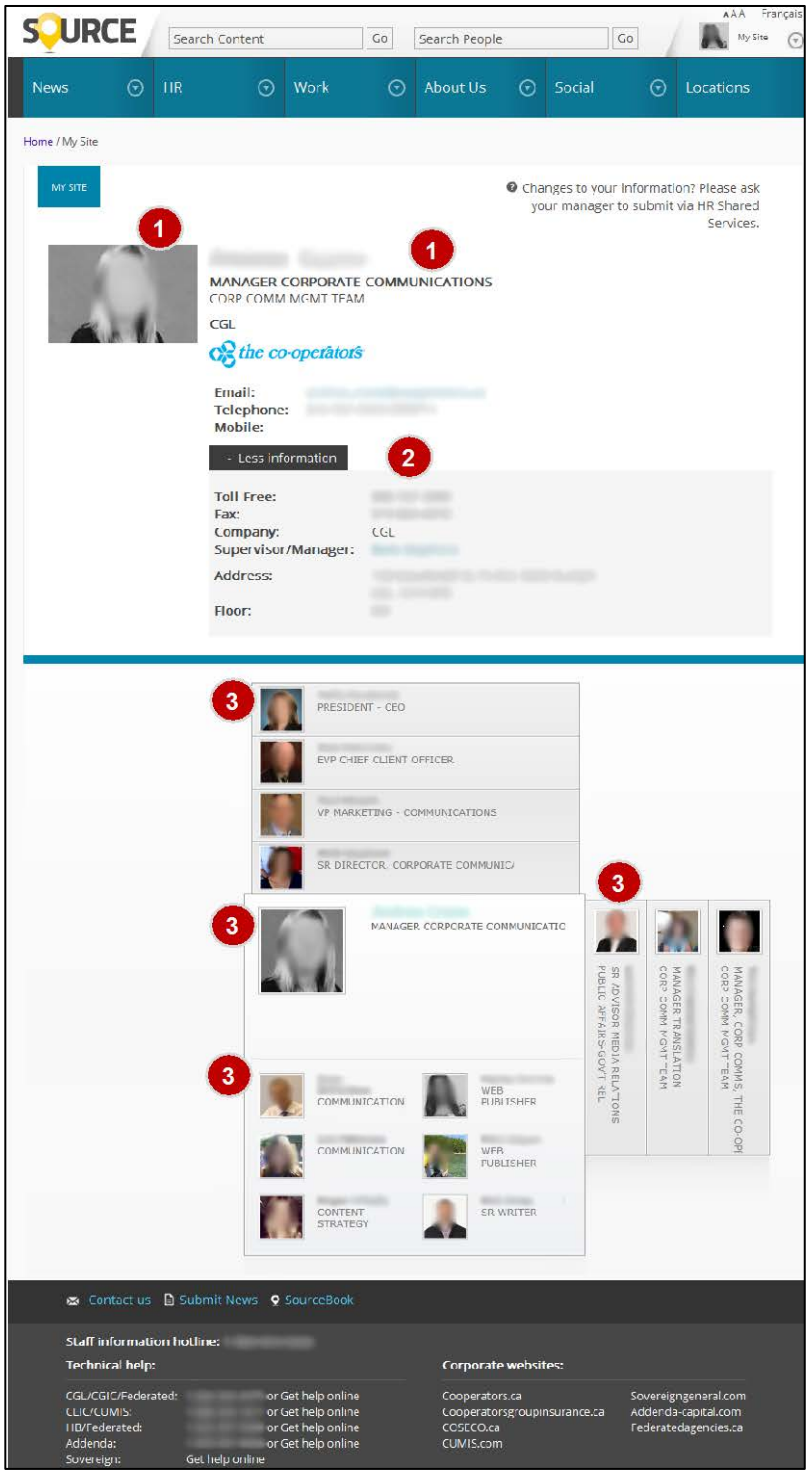


Image 22. The Co-operators Intranet: *My Site*.
29_TheCooperators_03_MySite_live.png

My Site Highlights

1. **Photo and Job Information:** The person's photo, job title, and the company he or she works in appears at the top of the profile.
2. **Contact information:** Phone numbers, email, office location, and more help colleagues to get in touch.
3. **Organizational Chart:** A refreshing variation on the traditional-looking organizational chart, this version shows the people the employee reports to and higher (appearing above the employee's profile box), the people with parallel jobs (horizontal to the box), and the people who report to her (below the box). The organizational chart is dynamic, and it expands and contracts as users navigate their way through the hierarchy.

News

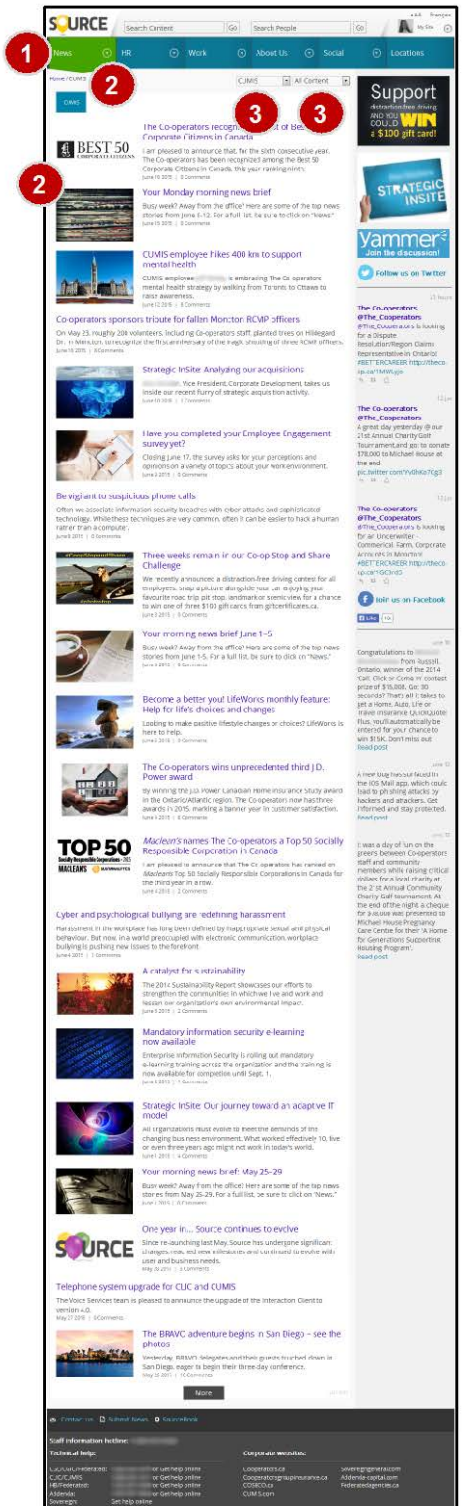


Image 23. The Co-operators Intranet: *News*.
30_TheCooperators_04_News_live.png

News Highlights

Beyond the homepage news, Source offers a rich *News* section.

1. **News Menu:** The *News* section is the first link in the global navigation. It's straightforward to determine which menu item is selected, as the background turns green and changes shape, while the unselected menu items remain blue and rectangular.
2. **News Page:** The page displays a chronological list of news articles targeted to users according to the company they work for (as indicated in the breadcrumb at the top of the page).
3. **Select Different Targets:** Although the default list shows targeted news, employees can select a different company from the drop-down menu. They can also select a specific content category, such as: *Industry, Business, HR, Field, People, Technology,* or *Strategic InSite* (the company's executive blog series).

News Article

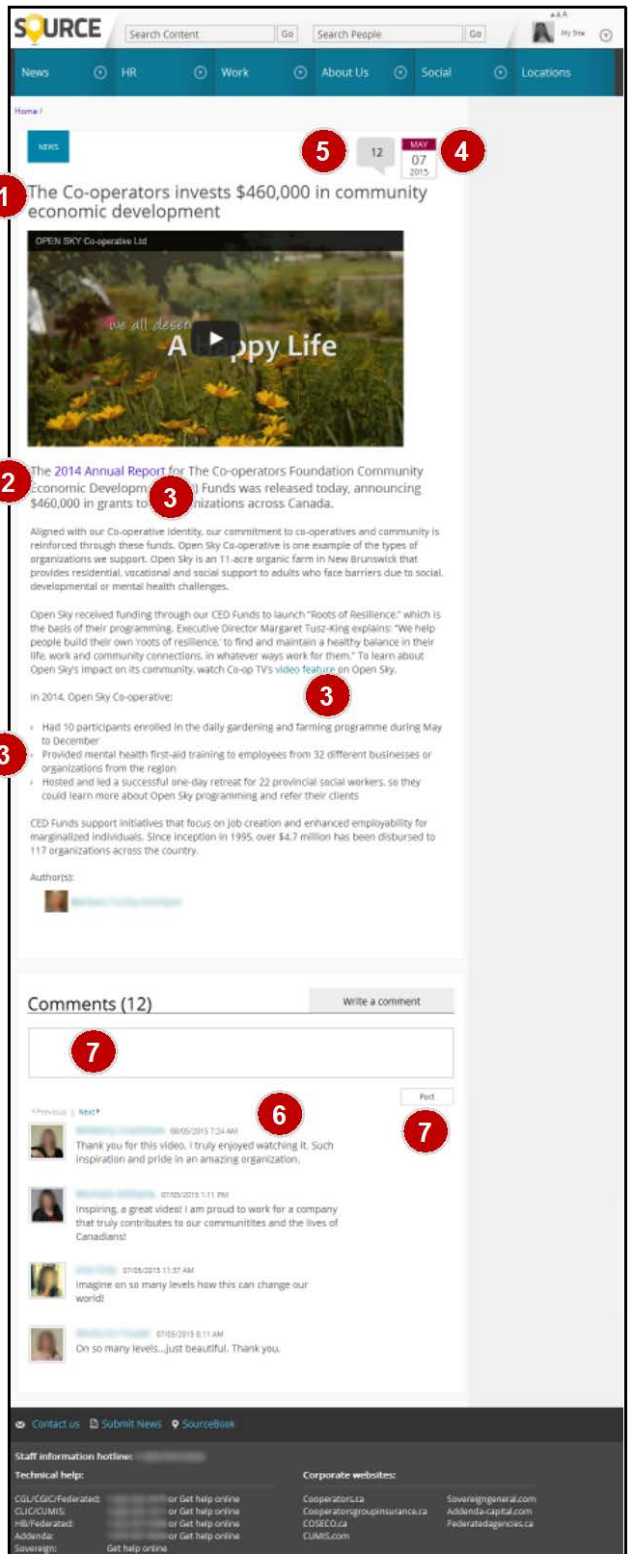
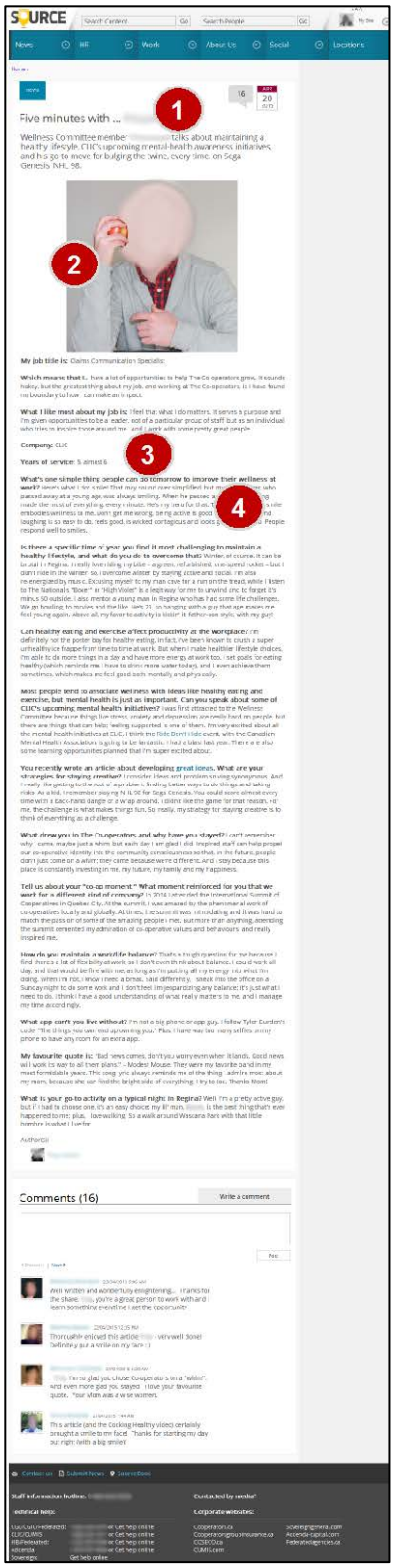


Image 24.
The Co-operators Intranet: News Article
31_TheCooperators_05_NewsArticle_live.png

News Article Highlights

1. **Clear Headline:** Large text at the top of the page is easily identifiable as the news headline.
2. **Legible Text:** Dark text on a light background, written in a narrow column, increases legibility.
3. **Bullets and Links:** The human eye scans to elements, such as bullets and links, when they appear in different colors. These help call out interesting points in the article, helping employees to scan more efficiently.
4. **Date:** The article's publish date appears in a familiar calendar icon at the top.
5. **Number of Comments:** A ubiquitous comment icon with a number inside indicates how many comments have been made on the article.
6. **Comments Made:** Comments appear in an expected place, below the *Comments* field at the end of the article.
7. **Make a Comment:** An open text field and the *Post* button beckon people to participate and share their thoughts.



Showcase Employees Highlights

1. ***Five minutes with…*** **:** This is a fast, simple, and creative way to showcase a different employee each week. The name of this feature indicates to readers that it will take just a few minutes to read.
2. **Picture:** A photo of the person is either taken in the work context or related to his or her response to one of the article's questions.
3. **Questions:** The article is formatted as a simple question-and-answer piece to help keep the editing to a minimum. The questions are in bold text.
4. **Answers:** Answers are written from respondents' perspectives and demonstrate how their work role fits within the organization's business objectives, while also revealing aspects of their personality.

Image 25. The Co-operators Intranet: *Five Minutes With…*: A Feature That Profiles Employees.
32_TheCooperators_06_FiveMinutesWith_live.png

Recognize Employees: Change in Role

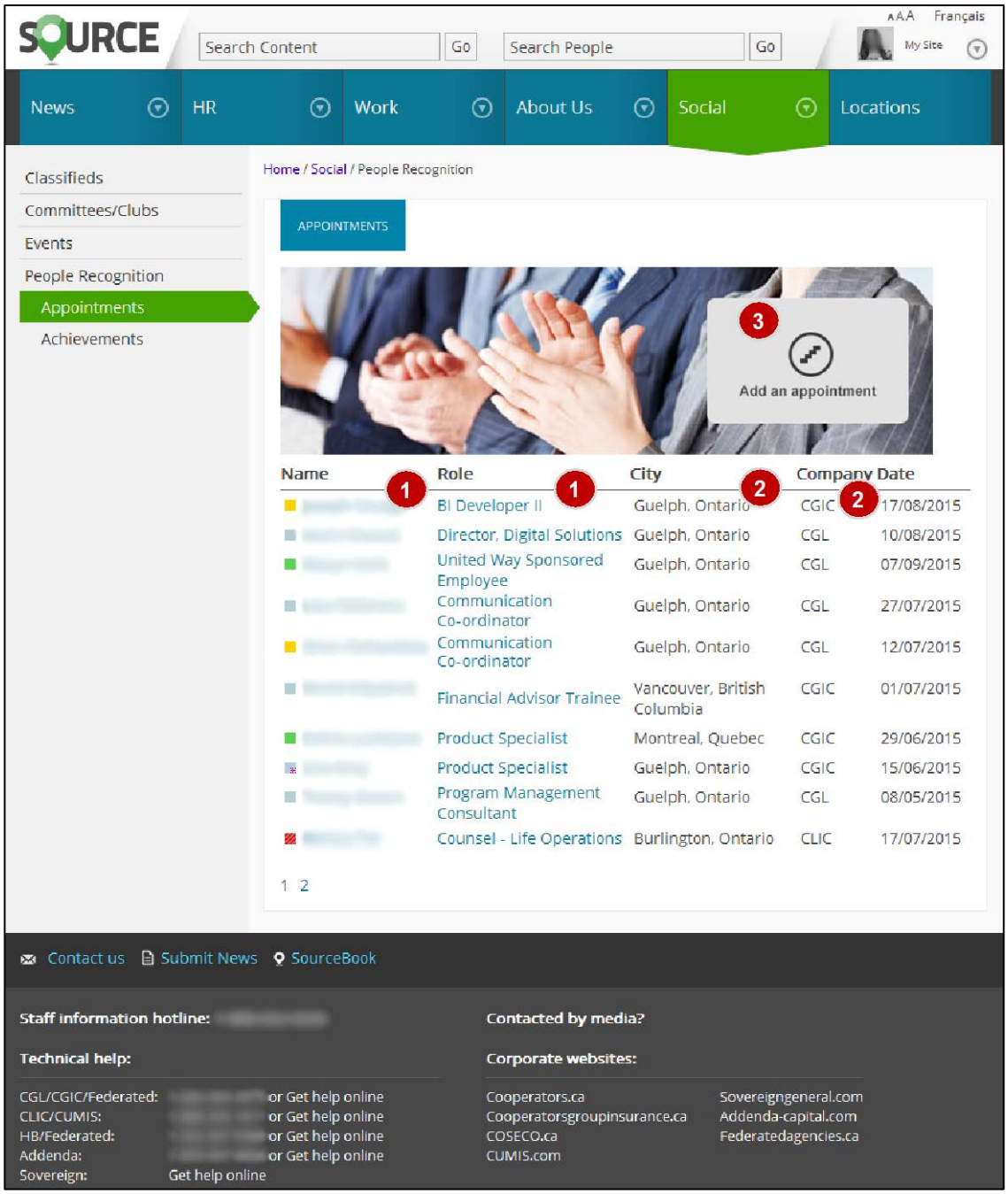


Image 26. The Co-operators Intranet: *Appointments* Listing. This listing appears in the *People Recognition* tab of the *Social* section. *33_TheCooperators_07_SocialAppointments_live.png*

Recognize Employees: Change in Role Highlights

1. **Name and Role:** When employees are appointed to a new role, it is recognized on Source, which lists the person's name and the new role. This helps people feel acknowledged and also communicates the change to other employees.
2. **Where and When:** The city, company, and date of the role and appointment are listed.
3. **Add:** The *Add an appointment* link allows users to post new appointments, eliminating the need for web publishers.

Recognize Employees: Education

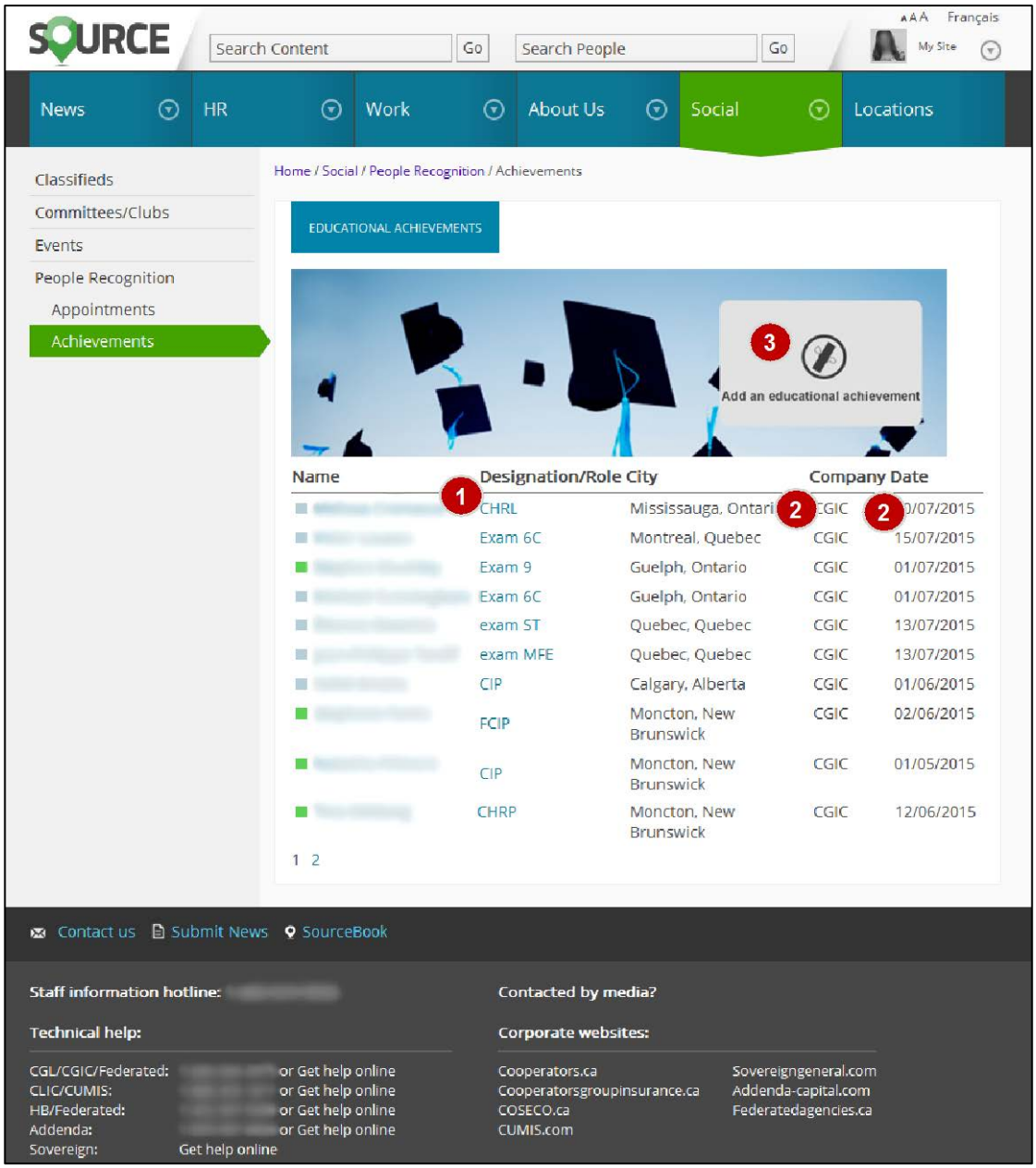


Image 27. The Co-operators Intranet: Achievements Listing in the *People Recognition* Tab of the *Social* Section.
34_TheCooperators_08_SocialAchievements_live.png

Recognize Employees: Education Highlights

1. **Name and Education/Role:** When employees have completed specific education or training, or achieved a new designation, it is recognized on Source. The person's name and achievement are listed. In addition to the personal enrichment, it's nice to be recognized for reaching new goals and levels. It also can help employees find colleagues with particular knowledge and skills.
2. **Where and When:** The city, company, and date of the achievement are listed.
3. **Add:** The *Add an educational achievement* link allows people to post new achievements directly, eliminating the need for web publishers.

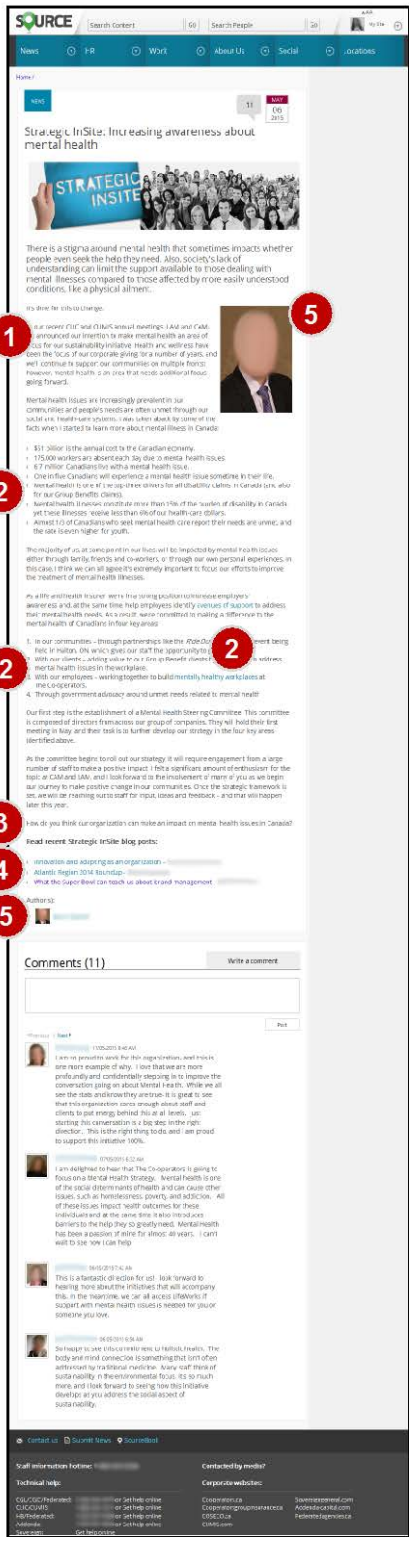


Image 28. The Co-operators Intranet: Executive Blog Article
35_TheCooperators_09_StrategicInSiteBlog_live.png

Executive Blog Series Highlights

Senior leaders take turns writing blogs on various topics related to their expertise. This demonstrates to employees the leader's desire to share and collaborate with them. The *Comments* field lets employees and executives engage in discussions.

1. **Content:** Executives share various efforts and/or positions, along with their related activities and plans.
2. **Formatting:** Bullets, numbers, links, and narrow columns make content easier to scan.
3. **Call to Action:** A question at the end of the article directs employees to give their opinions. This increases participation; some employees would not naturally comment on an executive's post.
4. **Related:** Links to recent blogs appear at the end.
5. **Author:** The author's name and photo appear on the right.

Social Events

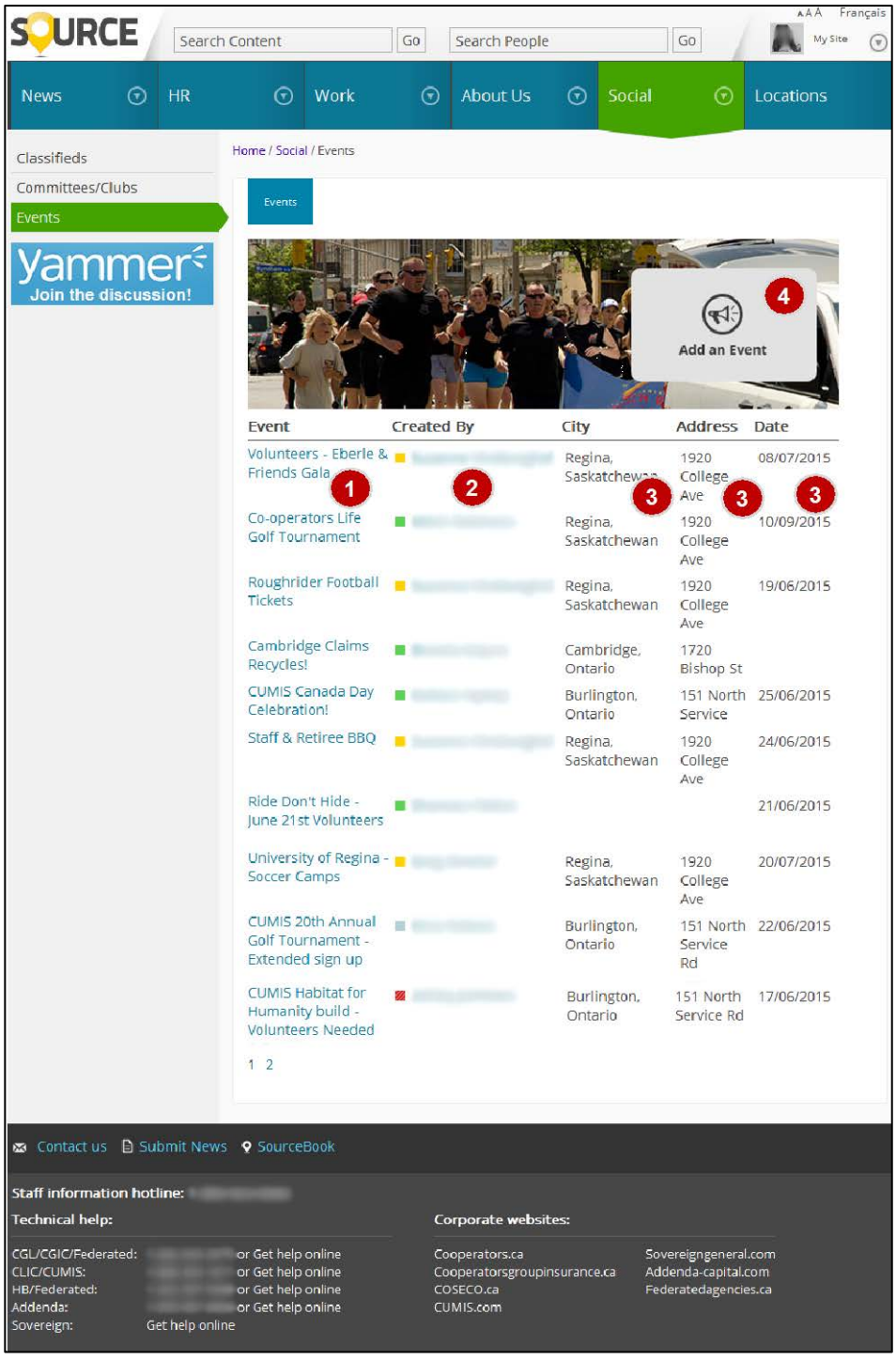


Image 29. The Co-operators Intranet: *Events* Listings Page in the *Social* Section. *36_TheCooperators_10_SocialEvents_live.png*

Social Events Highlights

Employees can engage with one another beyond the typical work meetings through the social activities (such as sports teams) and volunteer opportunities listed in the *Events* section.

1. **Name:** The name of the event is a link to more information.
2. **Owner:** The person who created the event is listed, in case further contact is needed.
3. **Where and When:** The address and date are listed.
4. **Add:** Anyone can add an event via the *Add an Event* link.

About Us

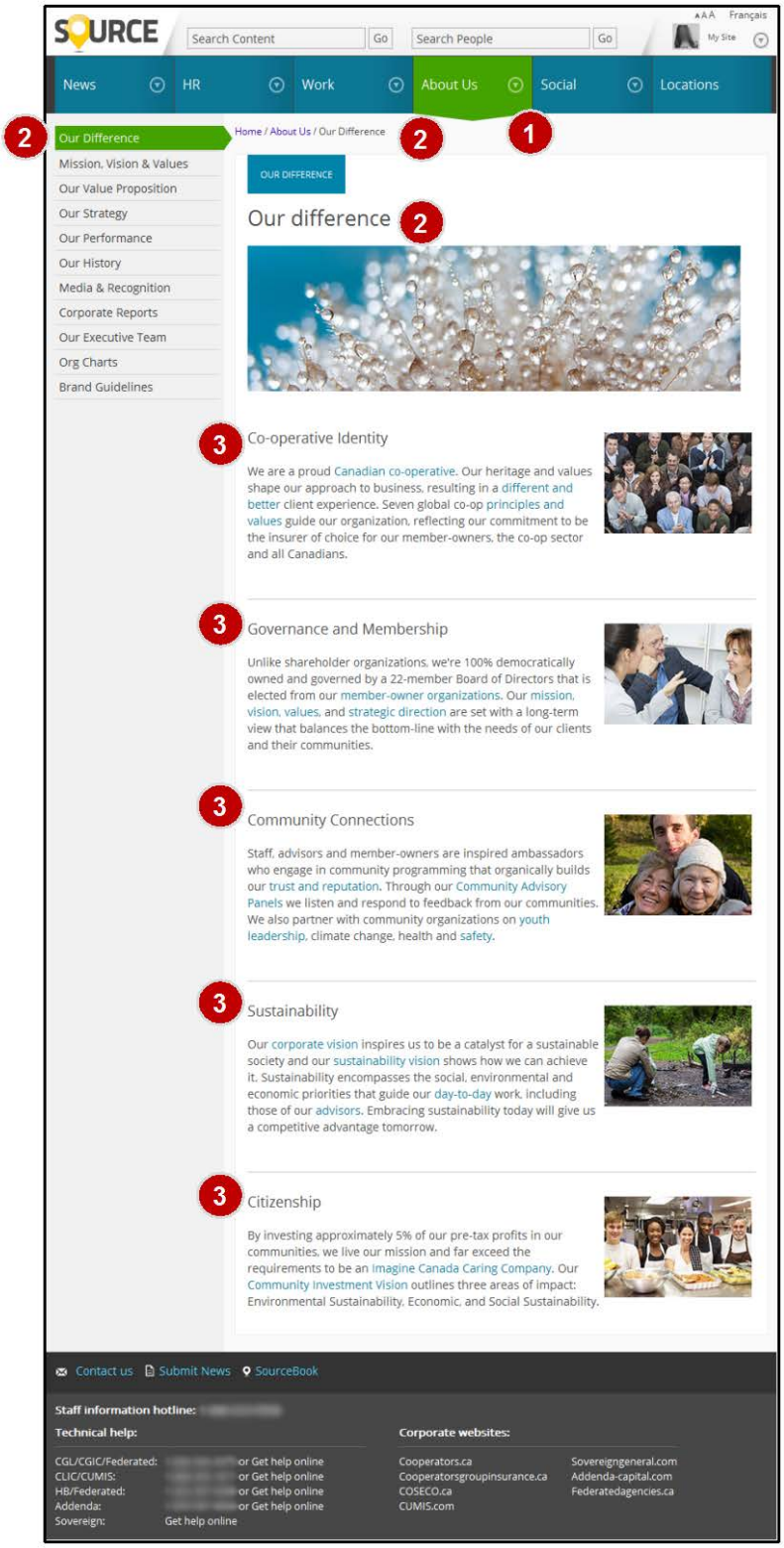


Image 30.
The Co-operators Intranet:
***About Us* Page.**
37_TheCooperators_11_AboutUs_live.png

About Us Highlights

About Us keeps employees aware of the corporate mission, strategy, community initiatives, financial information, and more.

1. **Menu:** A clear, simple label, *About Us,* in the global navigation makes the information easy to locate.
2. **Topics:** Important topics such as strategy, history, and performance are listed as links in the left-side navigation. The selected topic appears several times: as a green item in the left-side navigation, in the breadcrumb, and on the page title. All of these wayfinding cues add to employee confidence as they use Source.
3. **Sections:** Content is chunked into small, digestible sections. The title, lines, and white space between sections make them easy to scan to.

History

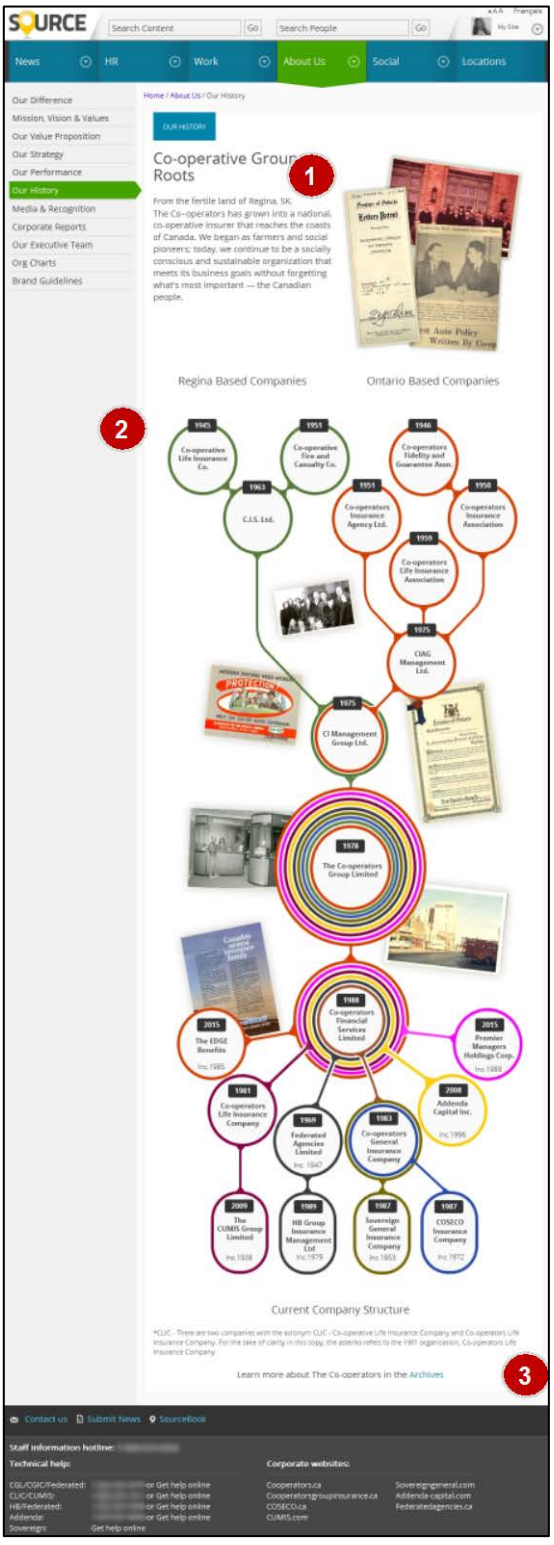


Image 31. The Co-operators Intranet: *Our History* Timeline.
38_TheCooperators_12_OurHistory_live.png

History Highlights

Historical information about the organization can be eye opening and inspiring to employees.

1. **Summary:** The background is summarized at the top of the page.
2. **Diagram:** A diagram shows the dates, historical events, and a timeline of how the company structure evolved.
3. **Archives:** To learn more, employees can click the *Archives* link.

History Pop-Up



Image 32. The Co-operators Intranet: Information Bubble on the History Page. *39_TheCooperators_13_OurHistoryBubble_live.png*

History Pop-Up Highlights

1. **More Information:** Pausing the cursor over an element in the diagram opens a pop-up with related information.

Performance

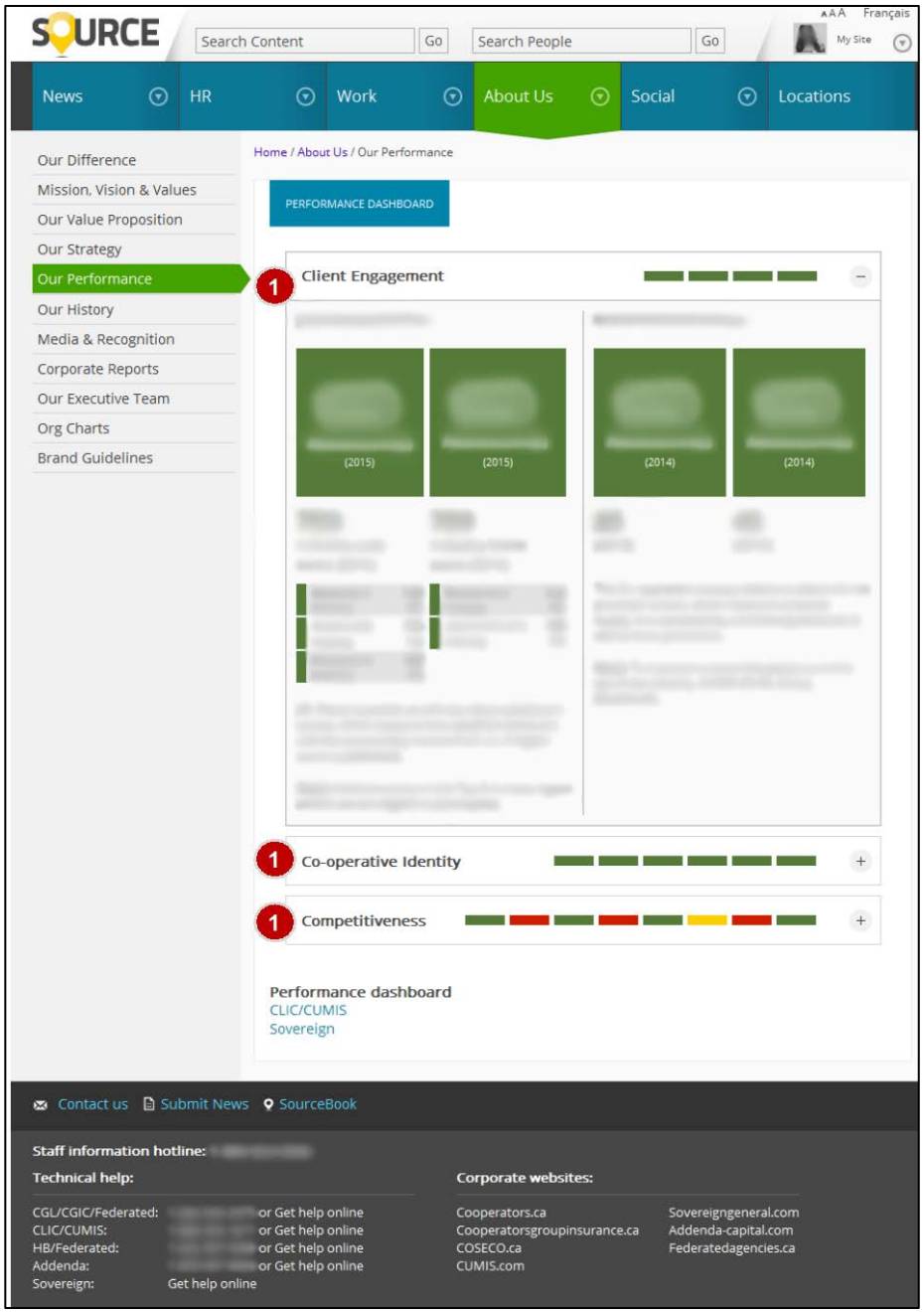


Image 33. The Co-operators Intranet: Performance Dashboard.
40_TheCooperators_14_PerformanceDashboard_live.png

Performance Highlights

1. **Performance:** This dashboard summarizes performance information about client engagement, identity, and competitiveness.

Locations

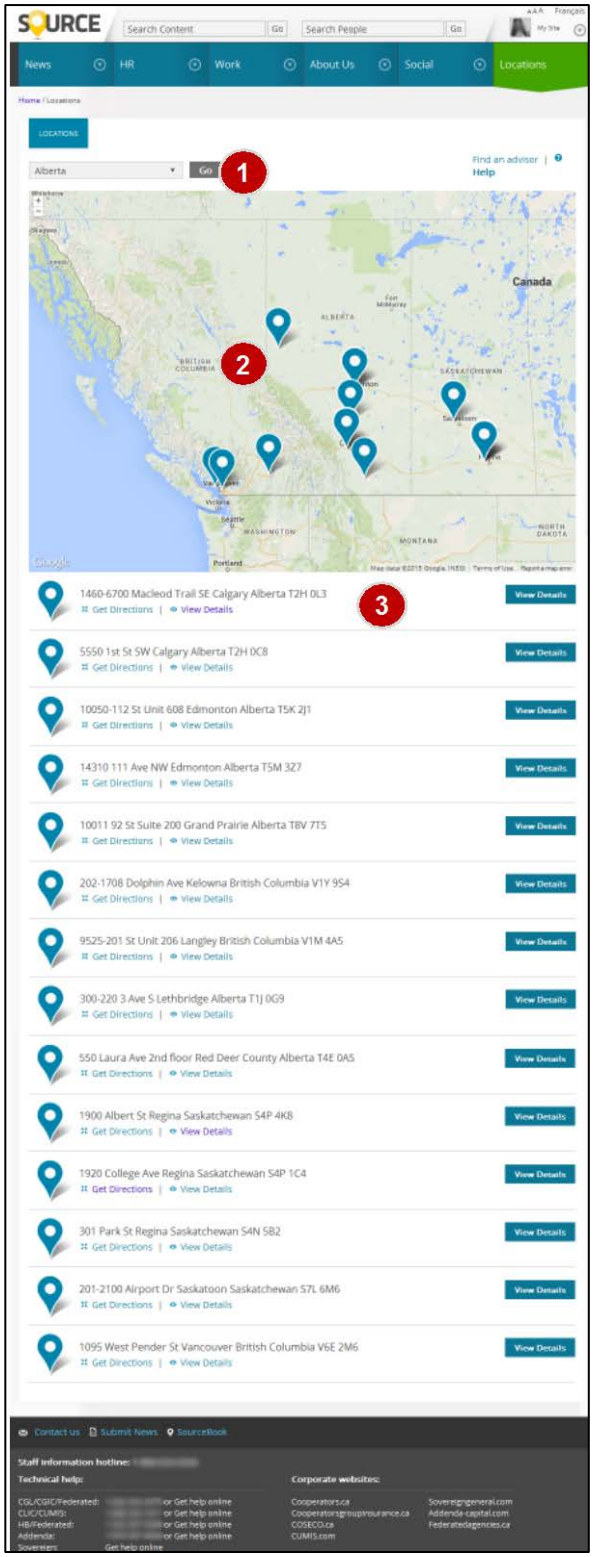


Image 34.
The Co-operators Intranet: Example *Locations* Page.
41_TheCooperators_15_Locations_live.png

Locations Highlights

Office location information is summarized and readily findable on Source. With several companies operating under The Co-operators Group Ltd., the intranet supports every employee regardless of his or her company, role, or geographic location. So, the ability to find locations can be very informative.

1. **Cities:** A drop-down by city makes it easy to see locations.
2. **Map:** Pinpoints on the map display offices and their vicinity.
3. **Summary:** Address and links to directions and details make getting all the information you need a snap.

Help

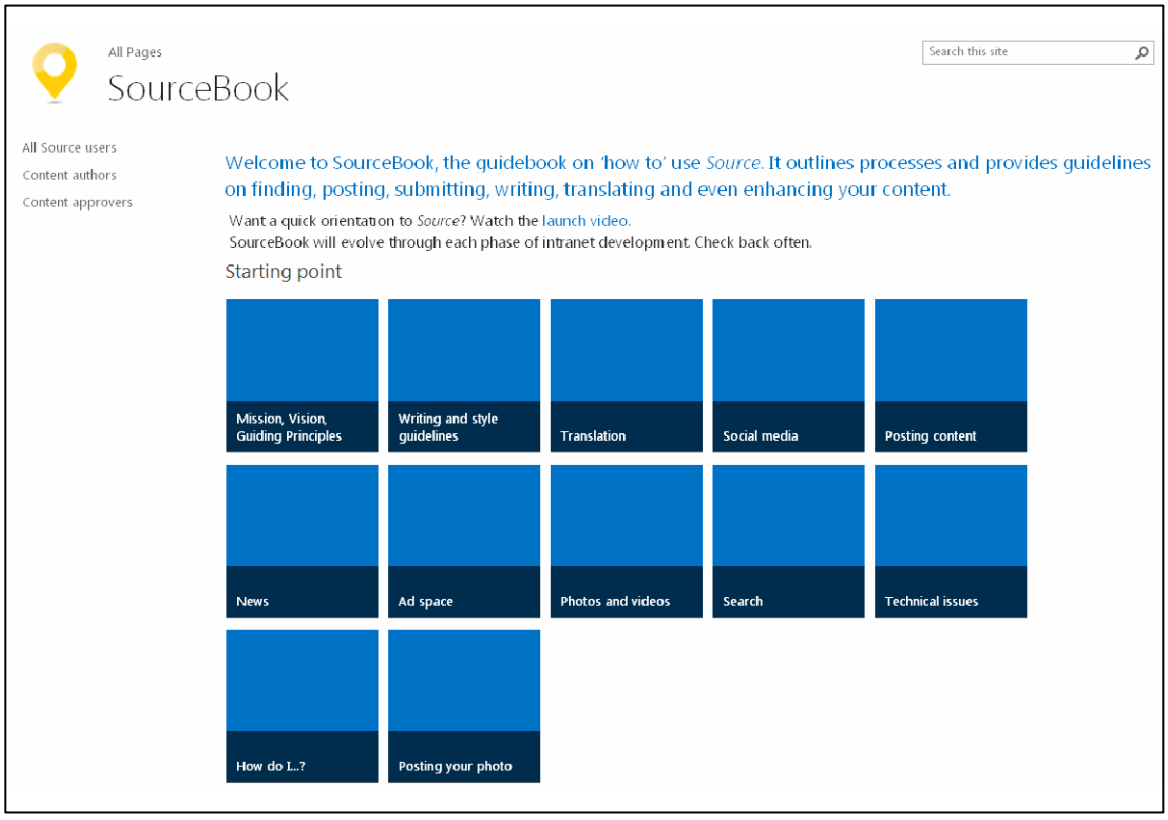


Image 35. The Co-operators Intranet: *SourceBook*. This provides various types of help guidelines. *42_TheCooperators_16_SourceBook_live.png*

Help Highlights

The simple intranet design doesn't warrant help per se. Still, *SourceBook* provides guidelines, video, and written steps about how to use various intranet sections.

Megamenu Navigation

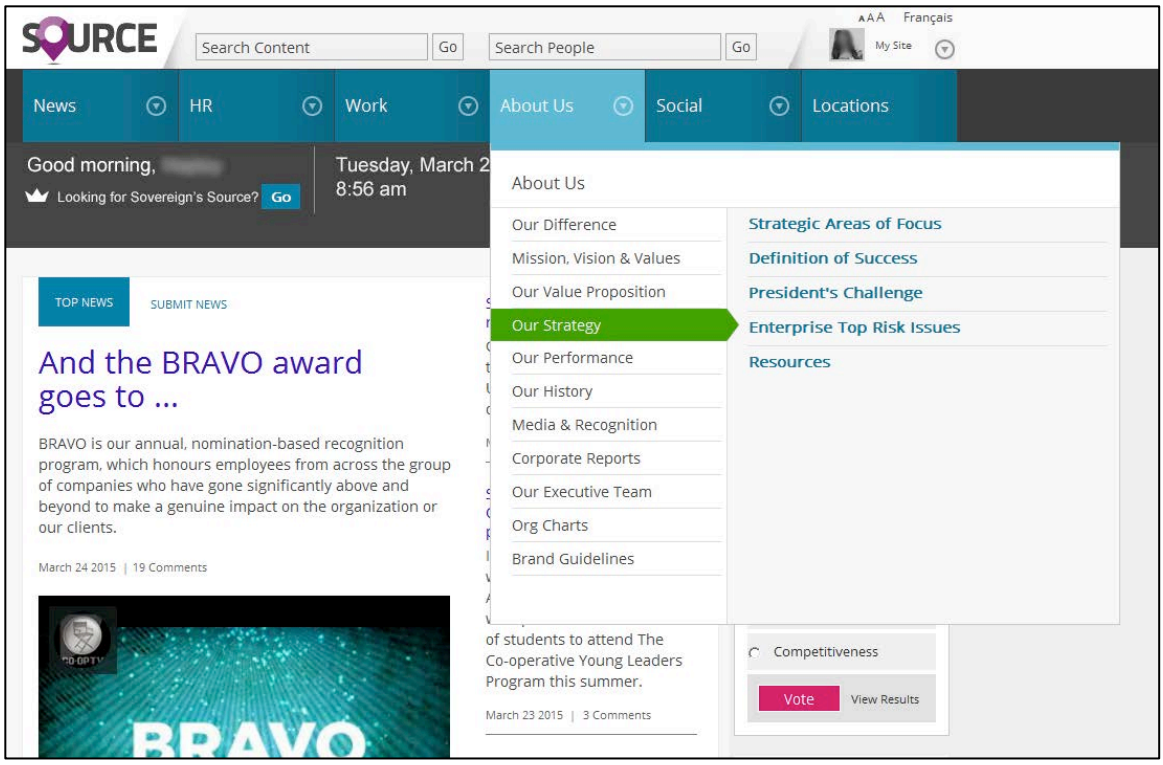


Image 36. The Co-operators Intranet: Megamenu Navigation. The megamenu navigation is simplified, with just six high-level categories. The clear tags and titles provide an intuitive, decluttered user experience. *43_TheCooperators_17_MegaMenuNavigation_live.png*

Content Search Results

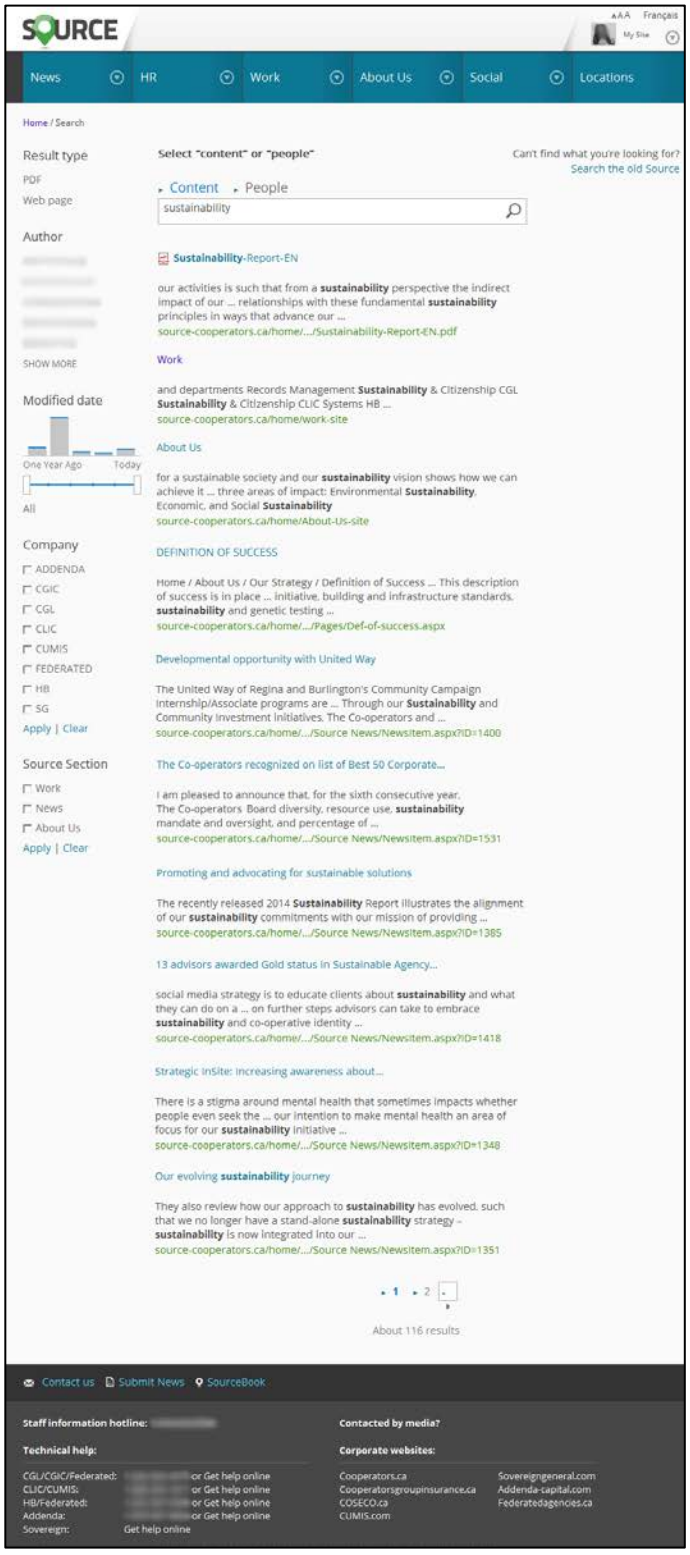


Image 37.
The Co-operators Intranet:
Content Search Function.
Using the content search function, employees can look up articles, resources, or pages using keywords and wildcards to quickly find the information they need to do their jobs.
44_TheCooperators_18_ContentSearchUnfiltered_live.png

DESIGN PROCESS AND USABILITY WORK

The design team engaged employees throughout the planning process by posting nine quick polls and conducting 14 usability tests (nine eyetracking tests and five navigation-structure tests). The quick polls — which generated responses from 900 employees on average — confirmed which content was considered high-value and which features were important. More than 2,000 employees participated in usability tests, which measured the new intranet's ease of navigation and content organization.

The legacy intranet had standalone portals for different business areas, which contributed to the fragmentation of business processes and data, as well as creating clutter and preventing employees from finding the information they needed. To develop an enterprise-wide intranet that fostered collaboration, the rebuild project strongly emphasized IA from the start; revising content flows to optimize critical information pathways was one of its main objectives. This process included several components, including:

- **Outside research:** Team members referred to the Nielsen Norman Group's 2013 Intranet Design Annual and used Prescient Digital Media's resources to learn design best practices before they began to review the content.
- **Content audit:** Business requirements were determined and a draft of the IA structure was developed based on a content audit.
- **Testing:** Usability testing was then conducted to determine if the proposed site structure would be successful in improving user efficiency. The team used an online tree testing software called *Treejack* to evaluate content findability within the new structure compared to the existing structure. The test results from more than 350 participants demonstrated that the overall success rate for completing tasks using the new navigation was 92% and required an average of 2.7 minutes, compared to an overall success rate of only 52% and 4.2 minutes on the existing site structure. These results demonstrated that the new site infrastructure would not only improve organization and eliminate clutter, but it would help employees more effectively find what they need to complete their work.

The design team made some important changes to the intranet based on findings from the usability tests, for example:

- **News:** When testing the news section, team members found that employees consistently visited the announcement filter for people and HR news. The filter had become a catchall. As a result, team members refocused the news filters to help users narrow their news preferences. They shared these results with employees via intranet updates, which helped generate awareness and validated that the new navigation was intuitive.
- **Information finding:** During the testing, team members asked employees to find important information, such as the company's *Code of Ethics* and Health and *Safety Information*. They found that 79% of respondents could not find the *Code of Ethics*, so they added it as a quick link on the homepage. Approximately 60% of employees could

not find the *Health and Safety information*, which was mapped under *Life/Work balance*, so they moved it to the *Resources and Tools* section, which provided a higher success rate.

- **Company-specific news:** Only 65% of users were able to successfully navigate to news specific to their company, so the team added a section to the launch day animated video describing how to navigate the news.

Involving users in early testing and sneak peaks gave the team valuable insights into how people were using the new site structure and what was and wasn't working. For example, six months prior to launch, the rebuild team, along with company representatives, met with people from 16 major business areas to share a sneak peek of the site and demonstrate its functionality and high-level navigation structure.

"From these sessions, we received valuable feedback and changed some of our content mapping decisions," says Barb Stephens, Senior Director, Corporate Communications. "For example, we added quick links on the homepage of the intranet to key tools and resources, such as change forms, product manuals, and other high-traffic pages."

Getting Buy-In

Given how long it had been since the site had been changed, the team expected some challenges with buy-in from users when the site was rebuilt on SharePoint.

"Although The Source legacy intranet was inefficient and outdated, the majority of our employees have been with the company for nine-plus years and had memorized where to find content, so we anticipated that some users would have a difficult time with the change," says Stephens. "To help with the learning curve, the first news story on the new intranet featured a short video outlining the different features of the site and tips on how to best navigate. The article also introduced the *SourceBook* resource and provided contact information for assistance."

Checking in With Users After Launch

In September 2014, after the new site was launched, team members conducted focus groups to help determine the project's success and next steps. They wanted to know what was working and what wasn't. Employees in a variety of different roles from each of the companies were selected to participate; questions included:

- How much time do you spend on Source each day, and is that time increasing or decreasing?
- Why do you visit Source and what types of activities are you performing once you get there?
- How do you find specific areas or content on Source (search vs. megamenu vs. landing pages, etc.)?
- What additional capabilities would you like to see on Source?
- How can we help you better understand Source to make it easier to use?

In February 2015, Lunch and Learn webinars were offered to all employees so the team could share additional tips and tricks to help users get their work done more

quickly and easily. The webinars included video demonstrations on how to use the people and content search functionality, how to perform top tasks (such as find specific manuals and forms), and how to post in the *Social* section. They team also gave participants the opportunity to ask questions and provide feedback.

Those tools, resources, and presentations all helped educate users on how to use the new intranet and how it will help them perform their roles. "Education helped users embrace the new intranet," says Stephens. "In addition to providing support to employees, the education sessions provided valuable feedback and opportunities for improvement. Now, an introduction to *Source* is included in the onboarding program for all new employees."

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Palmer Anderson Web design and app development	• Collaborated with the intranet project working group to bring the intranet vision to life and develop an end-to-end solution
iMason Software consulting firm	• Developed the *Locations* page

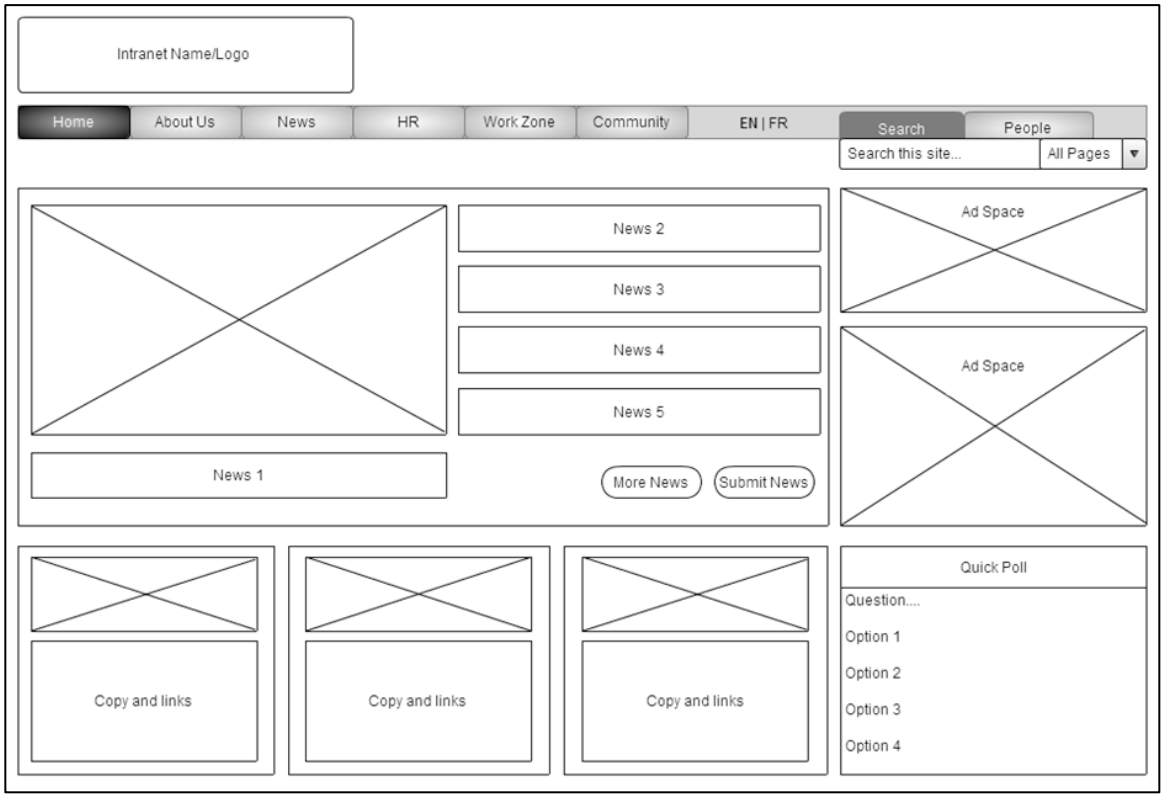


Image 38. The Co-operators Intranet: Wireframe. This wireframe shows the proposed homepage layout created in July 2013 during the design phase of the rebuild. *45_TheCooperators_19_HomepageWireFrame_version1.png*

GOVERNANCE

The Co-operators Content Strategy and Publications team has oversight of the intranet. They lead the strategy, development, implementation, and management of intranet content. The Web Development team provides support in maintaining the intranet by resolving production issues and implementing enhancements.

To ensure adherence to the governance structure, SharePoint permission groups were created to specify different intranet access levels according to the individual's role. Following are examples of three of the permission groups:

- **Source Visitors:** This group has access to see and read content published and approved on the intranet. All employees are included in this group.
- **Source Members:** This group has access to contribute to and edit intranet content, but they cannot publish or approve any of their changes to make them live to all users. Select members of the Translation team are included in this group, as they occasionally need to make changes to French content, but the Content Strategy and Publications team must approve those changes before they going live.
- **Source Owners:** This group has full control of the intranet and are able to edit, remove, and approve content. This exclusive group includes members of the Content Strategy and Publications team and the Web Development team.

"Maintaining ownership within a single team ensures all accountabilities are clear," says Stephens. "With set processes in place, any requested changes are considered for strategic fit and prioritized, which ensures the site maintains its clean, organized structure."

SourceBook was created as a reference document for users. It is a guidebook on how to use Source and is updated as the intranet evolves. This resource clearly outlines the processes and provides guidelines on finding, posting, submitting, writing, and translating content; it also helps employees understand the governance.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Content Strategy and Publications Team	• Lead the strategy, content, and alignment of the Source intranet • Co-ordinate development of Source, including content and technology • Post bilingual content on the intranet based on publishing standards • Provide training and support related to using the intranet efficiently to employees across the organization • Execute user acceptance testing
Web Development Team	• Analyze business requirements, deliver clear and concise documentation and functional specifications, and work to deliver solutions • Implement enhancements and new developments on Source, troubleshoot issues, and execute system integration testing to increase quality across the organization
Content Owners	• Own the content on their pages and maintain it over time

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	• http://source-cooperators.ca
Default Status	• Source is set as users' homepage, which automatically launches when they log on to their computers. This setting cannot be changed.
Remote Access	• Users with a corporate laptop or cellphone can access the intranet wirelessly on VPN; employees traveling for work, such as advisors, district management teams, and executives, often use this option.
Shared Workstations and Kiosks	• The organization does not have shared workstations or kiosks; however, employees can access the intranet on another employee's workstation using their unique ID if they are configured to the organization's network.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
Late 1990s	• Introduced the first corporate intranet, *Co-op Online*, to electronically publish manuals, forms, and training materials
December 2002	• Redesigned and relaunched the corporate intranet as *The Source*, with a new look, easier navigation, drop-down menus, and improved organization
2004	• Updated The Source with new portal technology that let individual companies build their own pages
May 2012–October 2012	• Conducted surveys and research to prepare a business case
December 2012	• Received a mandate with the approval of the business case
December 2012–March 2013	• Set governance, defined the project scope,

	and gathered requirements
March 2013	• Held kick-off meeting for intranet rebuild project
May–August 2013	• Gathered additional user research through surveys
September 2013–May 2014	• Developed the site and conducted quality assurance testing and training
May 27, 2014	• Relaunched the intranet as *Source* on SharePoint 2013
August 2014	• Implemented enhancements to improve search functionality
January 2015	• Redesigned the news landing page to provide a comprehensive view of recent articles
June 2015	• Introduced two new *People Recognition* tabs in the *Social* section to recognize educational achievements and appointments within the organization
Overall redesign time frame: 17 months (December 2012–May 2014)	



Image 39. The Co-operators Intranet: First Corporate Intranet. Co-op Online was introduced to electronically publish manuals, forms, and training materials. *46_TheCooperators_20_CoopOnlineHomepage_version1.png*

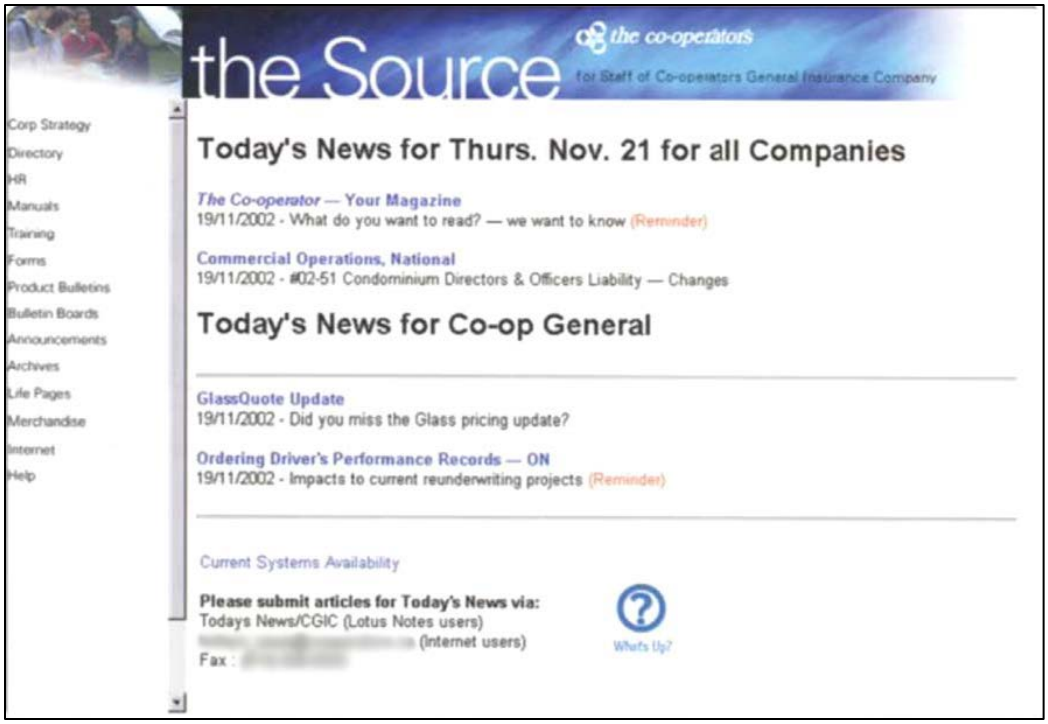


Image 40. The Co-operators Intranet: Corporate Intranet Redesigned and Relaunched in 2002. The Source featured a new look, easier navigation, drop-down menus, and improved organization.
47_TheCooperators_21_TheSourceHomepage_version1.png



Image 41. The Co-operators Intranet: 2004 Version of The Source. This version of the corporate intranet was updated with new portal technology that allowed individual companies to build their own pages.
48_TheCooperators_22_Homepage_version1.png

CONTENT AND CONTENT CONTRIBUTORS

CONTENT MANAGEMENT	
Contributors	Any employee can submit content for posting on Source news. This ensures that subject matter experts are submitting content related to their business area and that all company functions and locations are represented. Corporate Communications team members also actively contribute content for Source. Communication Consultants are assigned to lead the strategic communications plans for internal programs and initiatives and prepare news articles and quick polls for Source as part of their role.
Contribution	The news submission form is accessible on the homepage and in the site footer. In the form, employees input the headline, lead paragraph, article copy, publish date, and other notes; the form is then sent to the Content Strategy and Publications team, which reviews the article, edits it (if necessary), decides on placement, and then publishes it.
Training	Prior to launch, employees who frequently submit news content received training on SharePoint news. The webinar provided a sneak peek at the new intranet, explained the homepage's *Top News* section and the criteria for selecting featured articles, and outlined changes to the news submission process.
Management	The Content Strategy and Publications team receives all requests for new content or revisions; it always follows a team workflow process: • The content is initially reviewed for any issues that must be resolved with the contributor (for example, if information is missing or the requested publish date does not align with the time required for translation). Once any issues are resolved, a primary copy edit is completed. • The content is then submitted to the translation team, which might require up to three days to produce a copy of the article in French. • Another member of the team conducts a final review prior to posting.
Maintaining Quality	Having the governance of Source under one team allows the organization to effectively manage all content and ensure that consistently high-quality content is published.

Culling Content	To reduce the amount of intranet content, team members began the process by conducting a content inventory of its existing site. By cataloging all pages within The Source legacy intranet in an Excel workbook, they were able to get an overview of all content and the respective owners. Once the inventory was complete, they conducted a content audit to determine which content was still of value. Consulting with subject matter experts in each business area, they determined which content would be moved to the new Source and where it would fit within the new site structure. This is an ongoing initiative, as the team works toward reducing and eliminating other platforms and freeing up server space.

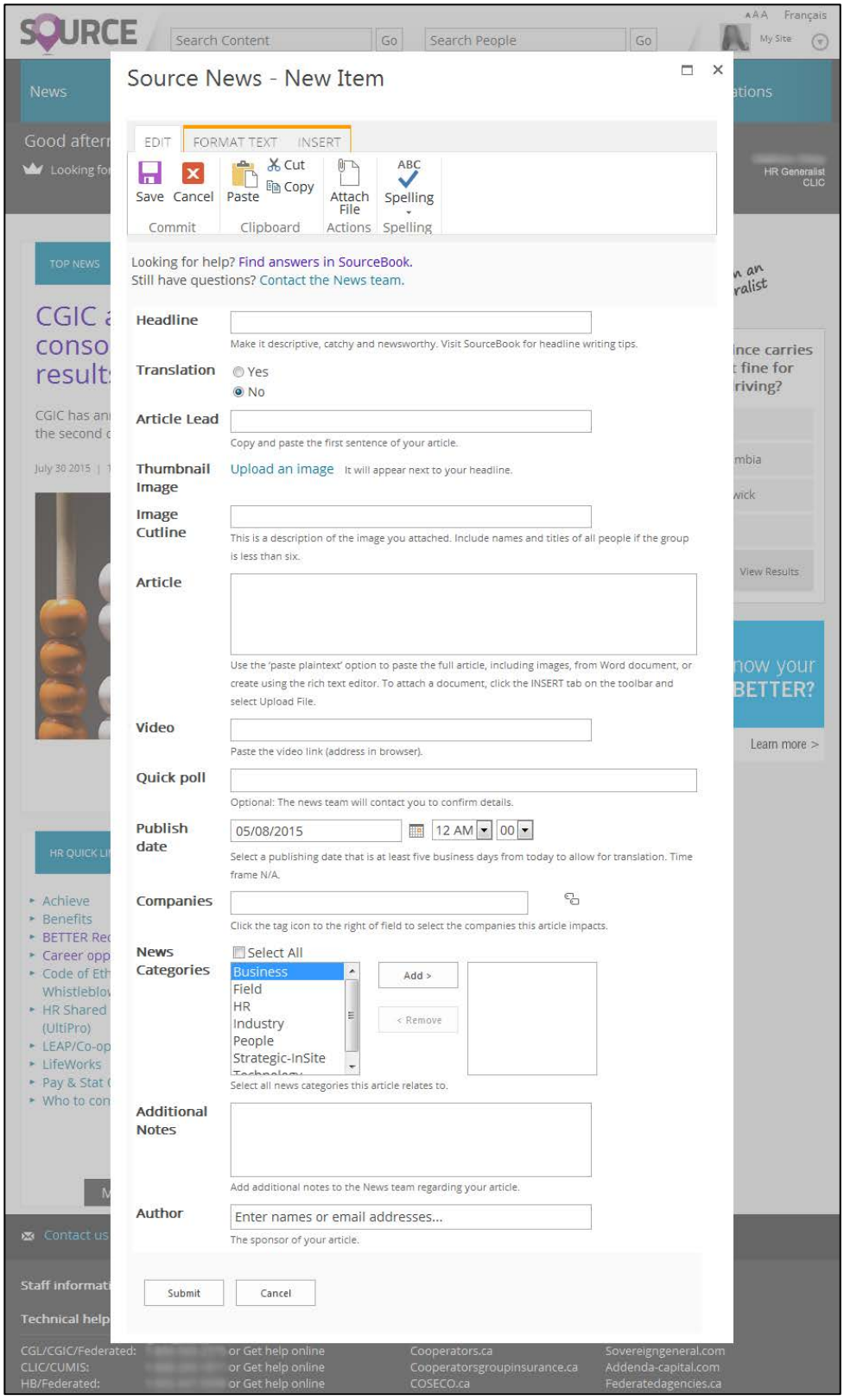

SOURCE
Search Content
Go
Search People
Go
Français
My Site
News
Source News - New Item
EDIT
FORMAT TEXT
INSERT
Save
Cancel
Paste
Cut
Copy
Attach File
ABC
Spelling
Commit
Clipboard
Actions
Spelling
Looking for help? Find answers in SourceBook.
Still have questions? Contact the News team.
Headline
Make it descriptive, catchy and newsworthy. Visit SourceBook for headline writing tips.
Translation
Yes
No
Article Lead
Copy and paste the first sentence of your article.
Thumbnail Image
Upload an image
It will appear next to your headline.
Image Cutline
This is a description of the image you attached. Include names and titles of all people if the group is less than six.
Article
Use the 'paste plaintext' option to paste the full article, including images, from Word document, or create using the rich text editor. To attach a document, click the INSERT tab on the toolbar and select Upload File.
Video
Paste the video link (address in browser).
Quick poll
Optional: The news team will contact you to confirm details.
Publish date
05/08/2015
12 AM
00
Select a publishing date that is at least five business days from today to allow for translation. Time frame N/A.
Companies
Click the tag icon to the right of field to select the companies this article impacts.
News Categories
Select All
Business
Field
HR
Industry
People
Strategic-InSite
Add >
< Remove
Select all news categories this article relates to.
Additional Notes
Add additional notes to the News team regarding your article.
Author
Enter names or email addresses...
The sponsor of your article.
Submit
Cancel

Image 42. The Co-operators Intranet: News Submission Form. Any employee can submit news using the submission form, accessible on the homepage and in the site footer. Employees input a headline, lead paragraph, article copy, publish date, and other notes; the form is then sent to the Corporate Publications team.
49_TheCooperators_23_NewsSubmissionForm_live.png

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Application Platform	• Microsoft SharePoint 2013
Web Server Hardware	• Microsoft IIS
Bug Tracking	• Microsoft Team Foundation Server
Programming Language	• .NET

The following criteria were considered when evaluating different technologies to try to determine what intranet platform would best suit the organization's needs:

- Cost savings in technology and resources
- Personalization
- Consistent user experience
- Increased online functionality
- Enhanced collaboration
- Unified technology

Achieving these outcomes with the new intranet reduced expenses and also promoted employee engagement, efficiency, and productivity, which ultimately led to increased competitiveness and superior client service.

Choosing SharePoint made sense as it combines various functions that would normally require separate applications into a single platform. These functions include web content management, document management, enterprise search, and an application store. "SharePoint also integrates well with all of the other workplace software used at The Co-operators," says Stephens. "This platform created a single user experience, connecting people and work processes across The Co-operators Group of companies, which was the purpose of The Source rebuild project."

RESULTS AND ROI

One objective of the intranet rebuild was to create a consistent user experience by moving to a standard CMS platform for all content across the group of companies. Although this goal will take several years to fully achieve, over time it will reduce the higher licensing fees, maintenance costs, resource requirements, and training efforts associated with using multiple CMSs. As the number of platforms phase out, the organization will see a return on investment.

Intranet traffic is measured on a monthly basis to determine both successes and opportunities for improvement. Since launch, users are consistently viewing news articles and comments continue to increase. The *Work* section receives the highest usage, which demonstrates that employees are using the intranet for task-focused activities to complete their work.

On the day Source launched, the rebuild team received 173 emails and phone calls for assistance using the new platform. Through education and support, the number of inquiries decreased significantly. The team still receives occasional questions on where to find certain content, but the majority of the emails now are suggestions for enhancements to improve the intranet. This change in activity demonstrates that users understand how Source benefits them and will continue to evolve to meet their needs.

LESSONS LEARNED

The Source team learned several key lessons throughout the rebuild process:

- **Never underestimate the demands of change management.** "While we had a comprehensive change management and communication plan in place, we still underestimated the amount of change management that would be required after launch. It was a challenge to prepare people for something they couldn't see or actively use in advance. Although we provided communication and education using a variety of mediums, people did not fully grasp the change until the new intranet was live."
- **Get feedback and provide training on site content, especially on key or complicated site areas.** "A big learning was not getting enough feedback about the news section. Because we are an organization made up of several companies, we needed to design a news area that publishes all news in one place — yet, we have a huge volume of news, so readers need to quickly find what's relevant."
- **Test layout and design with users.** Although team members tested category groupings and made changes accordingly, they did not test the news section's layout and design. "Users were confused about the way it functioned and how to organize the content. They worried they were missing important news." This shortcoming was highlighted five months after launch, when the team conducted focus groups and posted a Source survey asking for employee feedback on the news layout. "We gave employees a choice, and approximately 80% of respondents preferred a chronological view rather than the 'pin-box' style view, so we changed it shortly after the survey was posted."

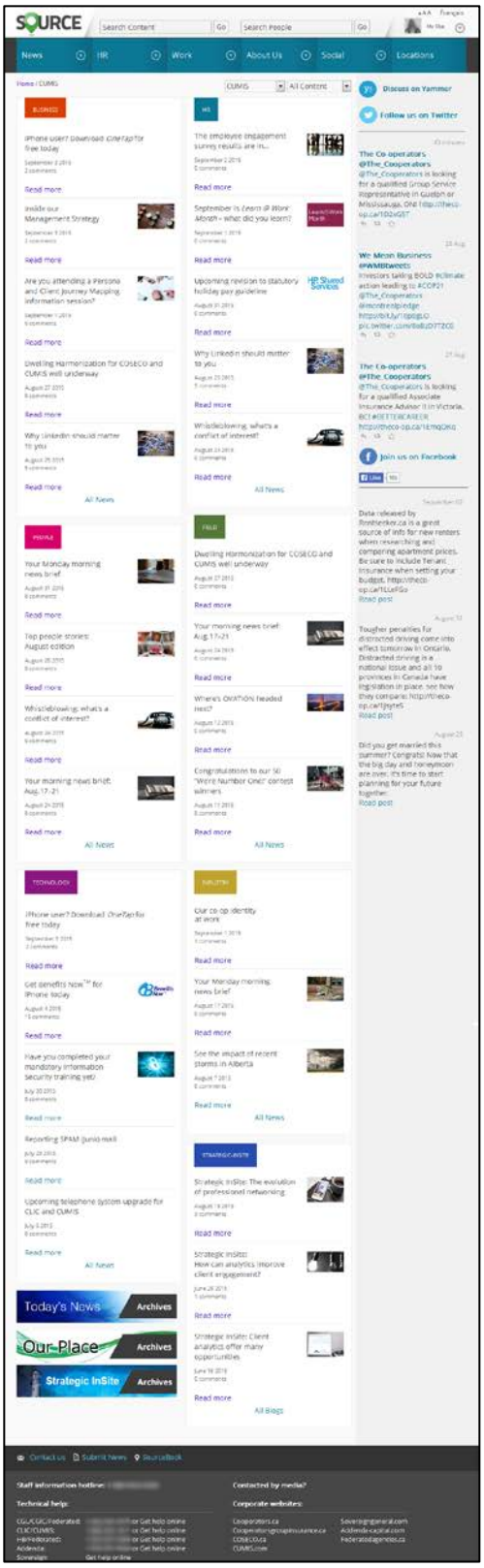


Image 43.
The Co-operators Intranet: News Page, Version 1. When Source relaunched in May 2014, the *News* landing page had a pin-box style view. However, focus groups and employee surveys showed that users had a hard time following news with this pin-box style view, so the team changed it to a chronological view (see Image 30).
50_TheCooperators_24_News_version1.png

Bank of America, NA

OVERVIEW

COMPANY

Bank of America is one of the world's leading financial institutions, serving individual consumers, small- and middle-market businesses, and large corporations with a full range of banking, investing, asset management, and other financial and risk management products and services.

Headquarters: Charlotte, North Carolina, US

Company locations: The company serves clients through operations in all 50 US states, the District of Columbia, the US Virgin Islands, Puerto Rico, and more than 35 countries.

Locations where people use the intranet: The intranet is available worldwide to all Bank of America employees.

Annual revenue: N/A; for information, see www.investor.bankofamerica.com

THE INTRANET

Users: Approximately 200,000

Mobile approach: The site was built explicitly for responsive mobile design; mobile usage will grow significantly in future releases.

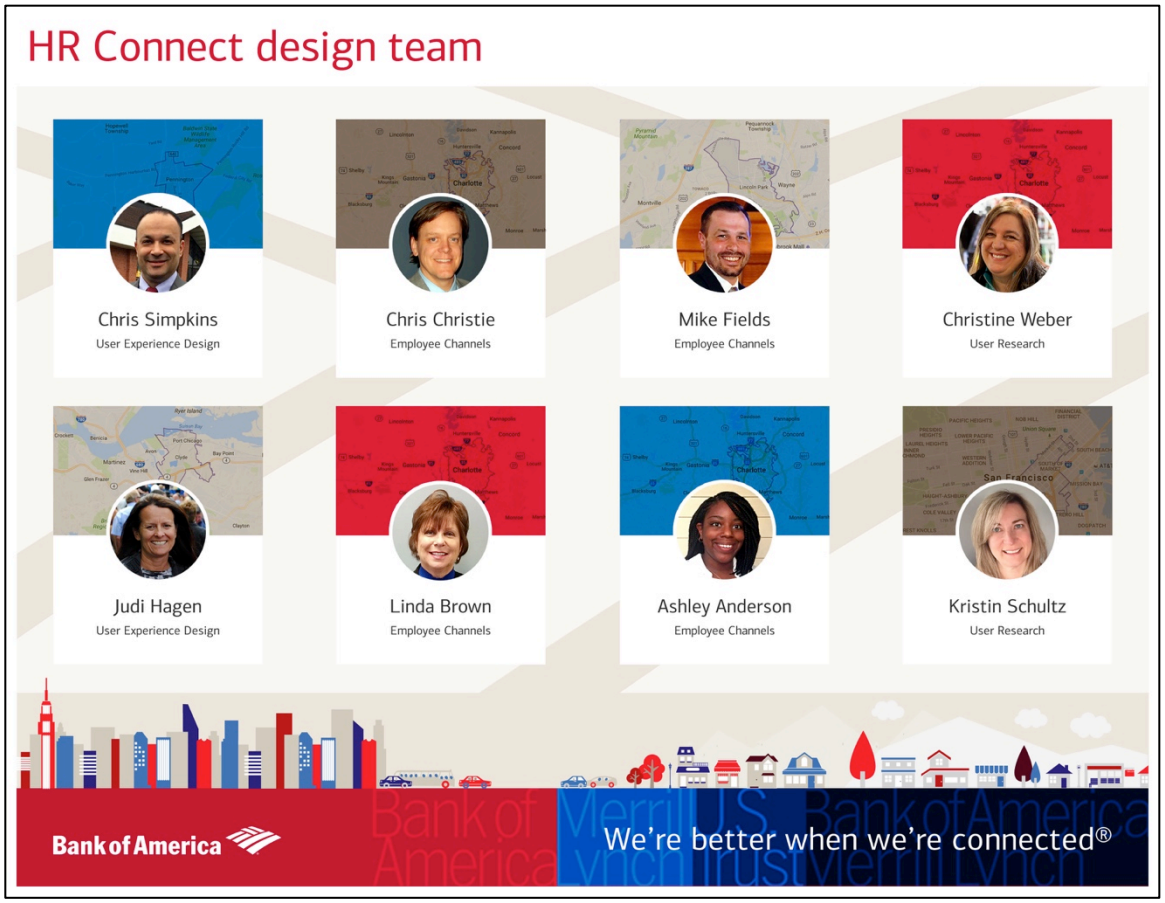
Technology platform: Open Text Web Experience Management

TEAM

Design team: An in-house UX team of approximately eight people designed the front-end, including the UX, user research, and branding.

Members: Chris Simpkins, UX Design; Judi Hagen, UX Design; Chris Christie, Employee Channels; Mike Fields, Employee Channels; Linda Brown, Employee Channels; Ashley Anderson, Employee Channels; Christine Weber, User Research; Kristin Schultz, User Research

INTRANET TEAM



Team members shown here (top row, left to right): Chris Simpkins, Chris Christie, Mike Fields, and Christine Weber; (bottom row, left to right): Judi Hagen, Linda Brown, Ashley Anderson, Kristin Schultz.

HIGHLIGHTS ABOUT THIS WINNER

HR Connect grew out of the need for an integrated HR portal that gives employees quick access to information and content, as well as offers a pathway to all needed HR tools and transactions. Prior to HR Connect, Bank of America's intranet, Flagscape, offered HR information to the company's 200,000 users in 35 countries throughout Europe, the Middle East and Africa, Asia Pacific, and the Americas. However, in some cases, HR information was difficult to find and was not personalized, making it hard for particular employees in specific locations to find relevant HR content.

The eight-person in-house team led the initiative to streamline information and delivery, adopt personalization, and create a responsive design that would quickly and easily deliver relevant information to employees. The resulting site has made huge strides in improving employees' online HR experience by providing the following:

- **A single point of entry and simplified sign-on.** Information that was previously scattered throughout the site is now consolidated. The content is organized in a task-focused navigational structure with easy access to relevant information. A simplified sign-on also controls security access points; once users are signed in, they have easy access to other bank sites and resources.
- **Personalization.** Employees are connected directly to the right information, resources, and tools, which are targeted by region, country, and line of business for each person. Further, US employees see a detailed summary of their benefits information, pay, retirement and savings, insurance, and more in a single dashboard view. The project roadmap includes plans to expand this feature internationally, tackling the challenge of streamlining dependencies on multiple decentralized data sources across countries and regions.
- **Impersonation.** Impersonation allows the site's support team to temporarily assume the identity of specific users to test functionality and troubleshoot, while still protecting confidentiality. In addition, a super-impersonation tool allows a few authorized support personnel see confidential data on the site from the viewpoint of different users.
- **Task-based navigational structure.** The team started with a content inventory and assessment, followed by card sorting with 85 employees and 85 managers. This resulted in five main categories that influenced the final IA. After reviewing best practices and conducting tree tests, the team finalized the megamenu, which presents clearly named and organized options to users.
- **Colleague involvement.** The team incorporated users, stakeholders, and subject matter experts (SMEs) at each step of the project, starting with a seven-month requirements and design phase. The iterative process included showing visuals and reviewing requirements along the way, so SMEs could picture what the UI would look like. This helped requirements discussions move more quickly. Continual design critiques, preview sessions, and demo days kept employees and stakeholders informed and involved throughout.
- **Consistent experience.** The templated design gives people a predictable experience across the site. The design allows enough flexibility for content teams to alter the layout and visual design, while still maintaining overall consistency. The streamlined system also allows for easier content maintenance and governance.

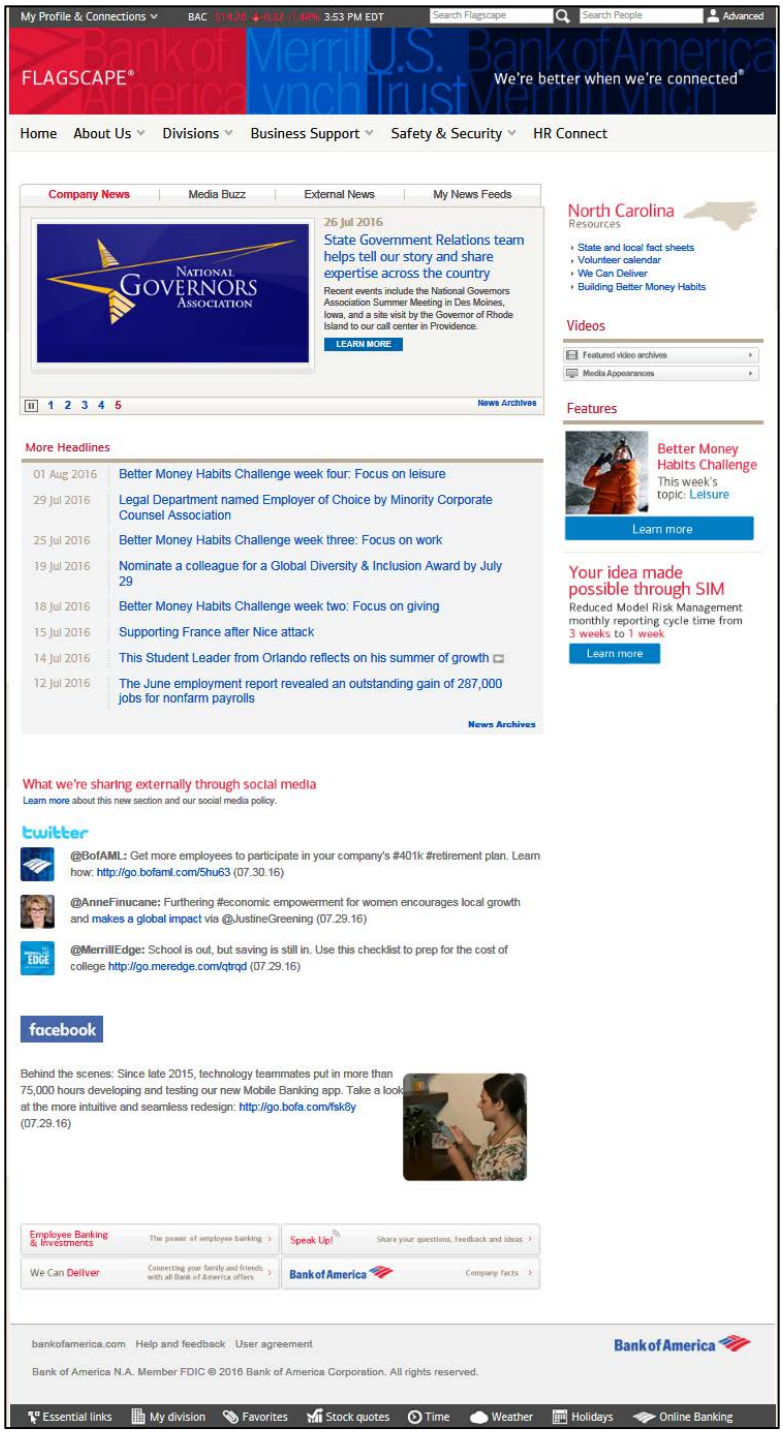
BACKGROUND

HR Connect is housed within the Flagscape enterprise intranet. Prior to implementing HR Connect, users did not have a connected end-to-end online experience. The site lacked a single point of entry to HR tools and information. Additionally, this information was often difficult to find and not personalized for the employee. The objective with HR Connect was to deliver an integrated HR portal that would give employees quick access to information and content and a pathway to all relevant HR tools and transactions.

The tool was designed to make employees' work easier and help them take advantage of all the benefits available to them at the bank. It also fits into the company's strategic plan by delivering a unified experience across the global HR online ecosystem, and simplifies and improves the employee's online experience.

With more than 100 stakeholders and core team reviews, it took approximately seven months to complete the requirements/design phase of HR Connect. The primary question and challenge of the redesign was**:** *How can we make the lives of employees easier by aggregating all HR content into a single location, so it is readily accessible, relevant, and easy to understand and navigate?*

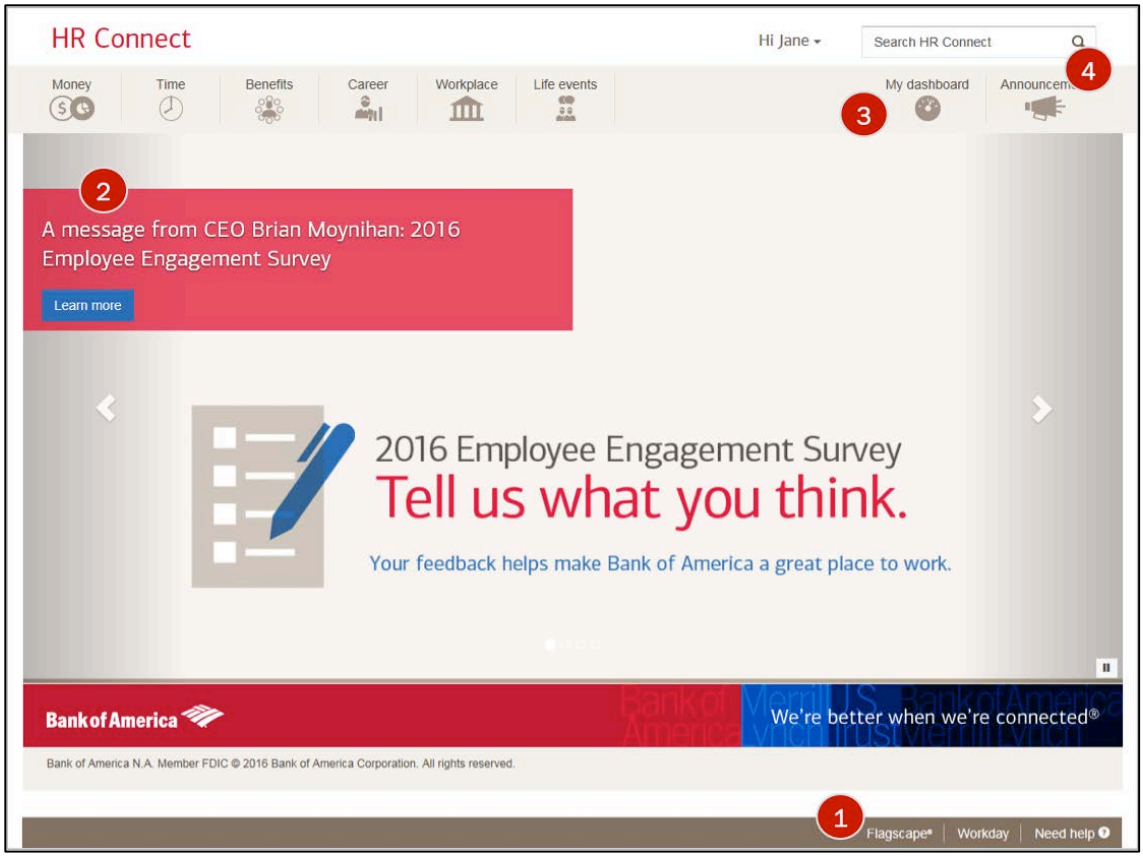
The design team used an iterative approach to determine requirements and create the design. It enlisted SMEs to help them visualize what the UI could look like. "We found that having visuals to go along with the requirements discussion helped us move through this phase with our stakeholders faster than typical requirements gathering," says User Experience Design Specialist Christopher Simpkins. "There were approximately 100 SMEs with whom we had to gain buy-in, and they represented all areas of our HR and technology landscape."



Bank of America Flagscape Homepage. Flagscape is the company's corporate intranet. The link to HR Connect can be accessed from the global navigation (far right tab) or from the *Essential links* in the toolbar at the bottom of the browser window. *BankofAmerica_01_Flagscape_home_live.png*

DESIGN REVIEW

Homepage

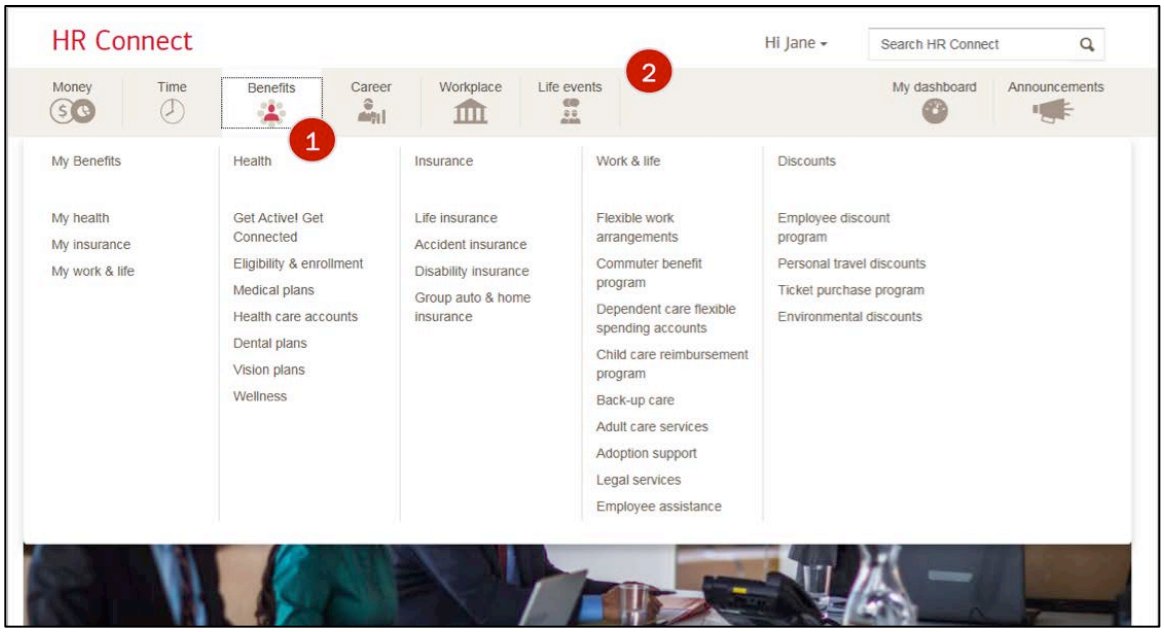


Bank of America HR Connect Homepage.
BankofAmerica_02_home_live.png

Homepage Highlights

1. **Easy access.** Employees access HR Connect via a link on Flagscape, the company's main intranet. They can return to Flagscape via a link at the bottom of the HR Connect site, where they can also access the transactional HR site, *Workday*, and support information (via *Need help?*).
2. **Timely information.** The homepage communicates important or time-sensitive information, with a carousel that features up to five messages at a time. Employees can navigate through the carousel via forward and back buttons, and pause it as needed.
3. **Dashboard access.** Early user testing showed that people liked having their personal dashboard as the homepage, but the homepage also had to include HR and general company information. Additionally, only US employees currently have access to the dashboard. Thus, the dashboard link was placed prominently in the design, in the upper right corner, making it easy to find.
4. **Search.** The search, which is specific to HR Connect, appears in the top right corner of each page of the site. The text field includes the filler text *Search HR Connect* to indicate the tool's scope. The magnifying glass icon makes it easy to submit the query.

Megamenu

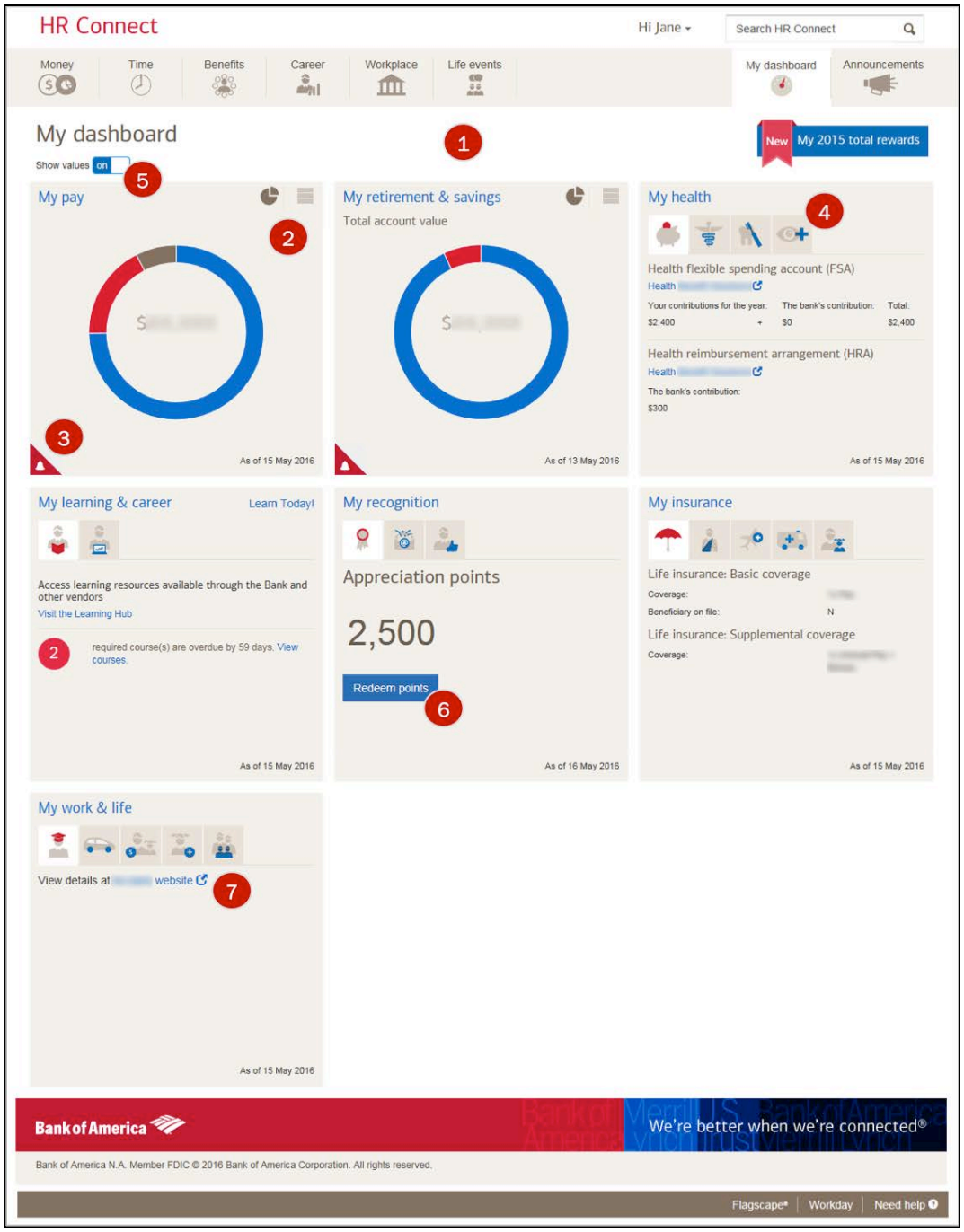


Bank of America HR Connect Megamenu. On this HR Connect homepage view, the *Benefits* megamenu is expanded to show the targeted content for this particular user.
BankofAmerica_03_home_benefits_menu_live.png

Megamenu Highlights

1. **Megamenu design.** The site's megamenu design gives people an overview of each navigation section and provides quick access to content. The menu indicates which section is currently selected using a white background and red highlight**.** Secondary categories appear at the top of each column of links, with clear differentiation between the categories. All content can be accessed via the megamenu.
2. **Categories.** Card-sorting exercises led to the site structure, which includes the categories *Money*, *Time*, *Benefits*, *Career*, *Workplace*, and *Life Events*, with additional access to *My dashboard* and *Announcements*. The megamenu was limited to only six primary categories to avoid clutter. Each category name is accompanied by an icon, part of which turns red when the category is selected. Also, category names are user-focused: all services and benefits are named according to their purpose, rather than their brand. For example, *Life Insurance* is listed as just that, rather than as the name of the insurance provider. This not only helps people easily find the right information, but also avoids navigation changes if the providers change.

Personal Dashboard

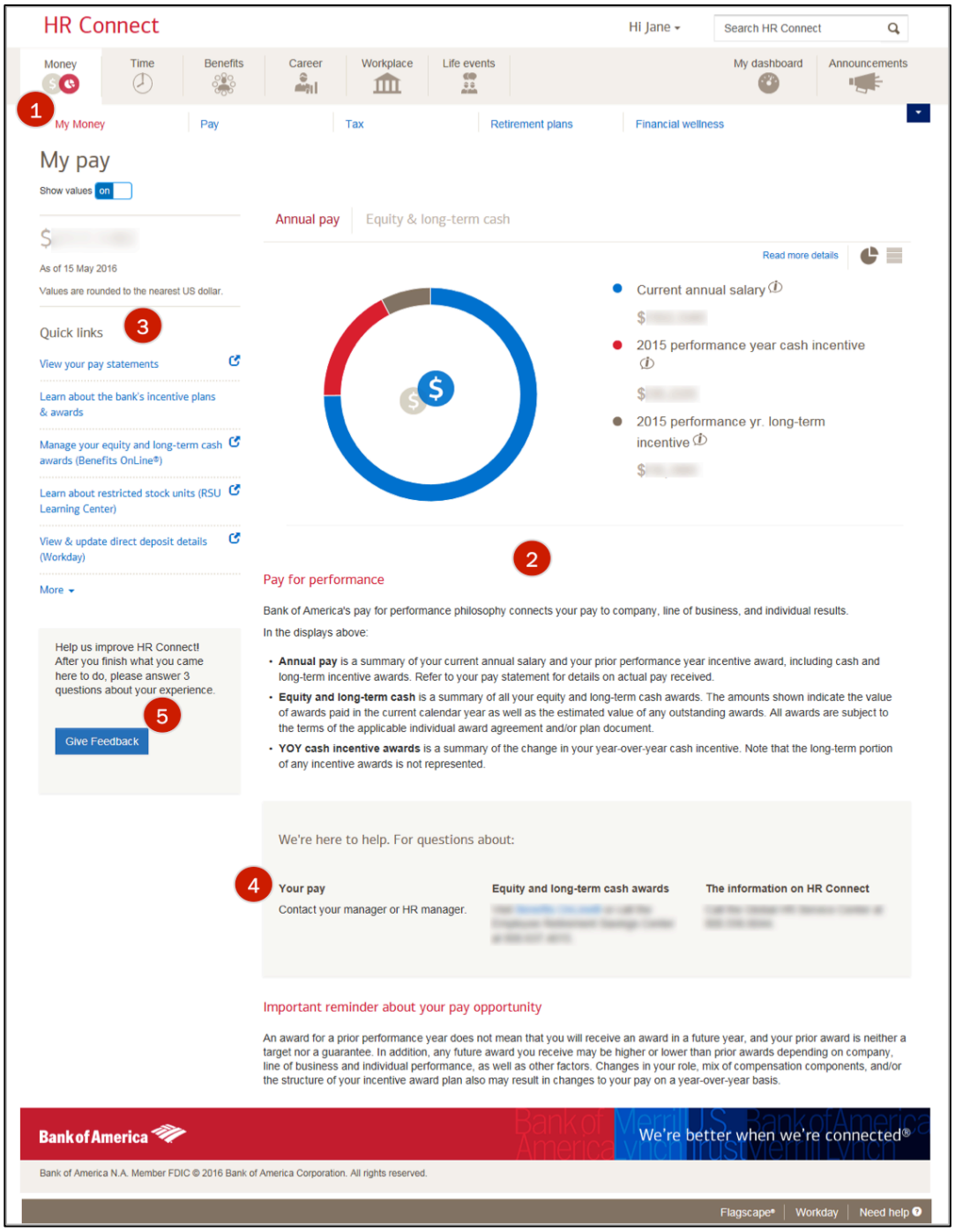


Bank of America HR Connect *My Dashboard* Page. A personalized summary of an employee's information. *BankofAmerica_04_dashboard_valuesOn_live.png*

Personal Dashboard Highlights

1. **Snapshot of information.** All US employees can access a personal dashboard. This view of benefits information summarizes details about pay, retirement and savings, health, learning and career, recognition, insurance, and work and life.
2. **View.** Employees can choose to see information in a chart or table view as appropriate, such as when looking at *My pay* or *My retirement & savings*.
3. **Alerts.** When users need to take action within a section, a bell icon appears in the lower left corner on a red background. Clicking it leads to targeted messaging about what they need to know or do.
4. **Subsections.** If a section has more than one information category, it uses a tabbed design labeled with icons. For instance, the *Health* section is split into flexible spending (a piggy bank), medical (the Rod of Asclepius symbol, commonly used to represent medicine and health care), dental (a tooth and a toothbrush), and vision (an eye and a plus sign). This design lets users dig into the section of interest, without having to leave the page and without cluttering the design with too much information displaying by default. Icons were used because text labels would have stretched the tab design vertically, horizontally, or both. Rollover text identifies the icon tabs to ensure their meanings are clear.
5. **Show values.** To protect each user's privacy, the page loads with values (that is, an individual's details) turned off. The user must flip the toggle to *On* to see personal information. This was done in part to accommodate the subset of employees who work in an open environment or lack a dedicated workstation.
6. **Appreciation points.** The dashboard includes a recognition section, where people can view their appreciation points and other items. Appreciation points are awarded to employees at certain levels who perform above and beyond expectations. Employees can use this area to track their appreciation points, as well as to redeem the points for merchandise or gift cards, available via an online catalog.
7. **Outside information.** Any information that cannot be pulled into the dashboard view is instead offered via a link directly to the appropriate website.

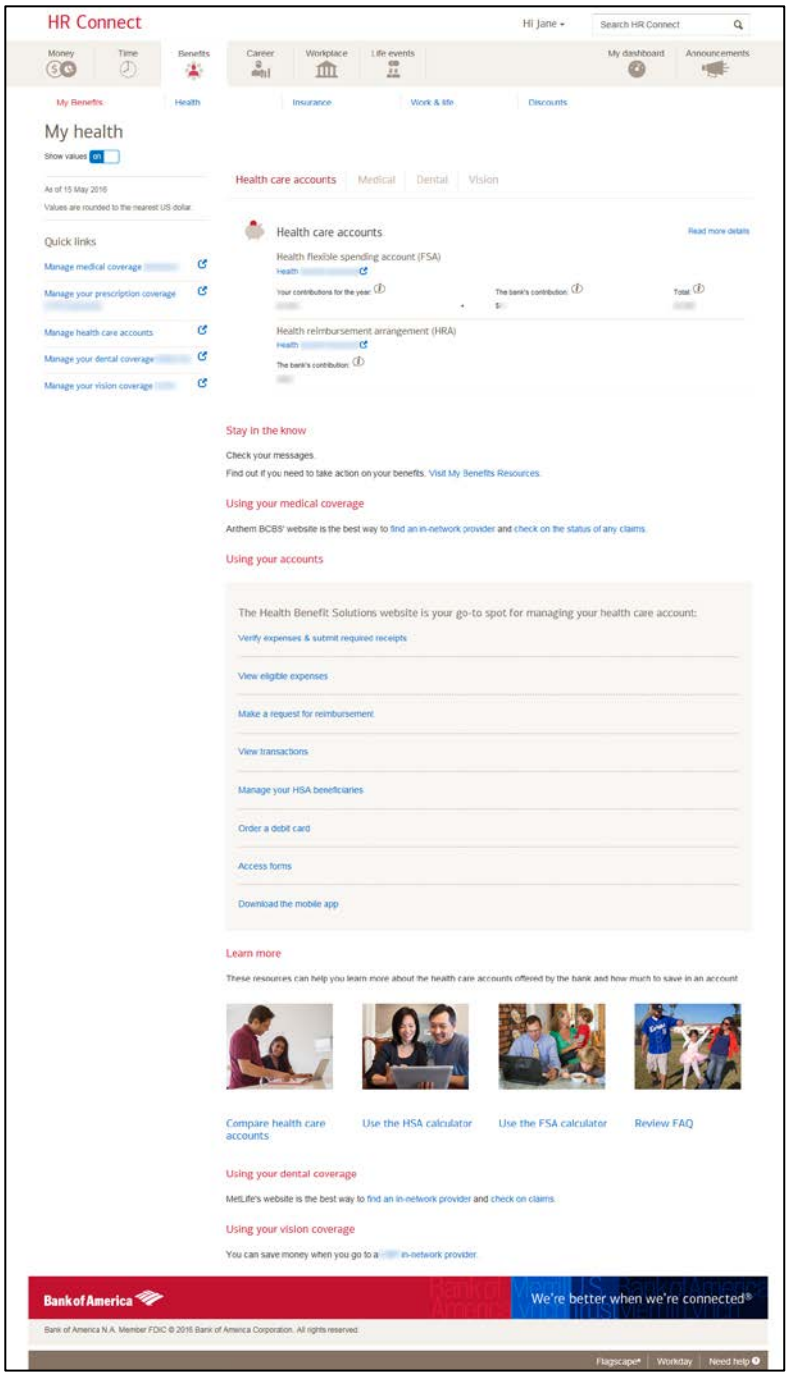
My Pay



Bank of America HR Connect *My Pay*. A detail page of the *My Pay* widget on the HR Connect dashboard.
BankofAmerica_05_MyPay_ValuesOn_live.png

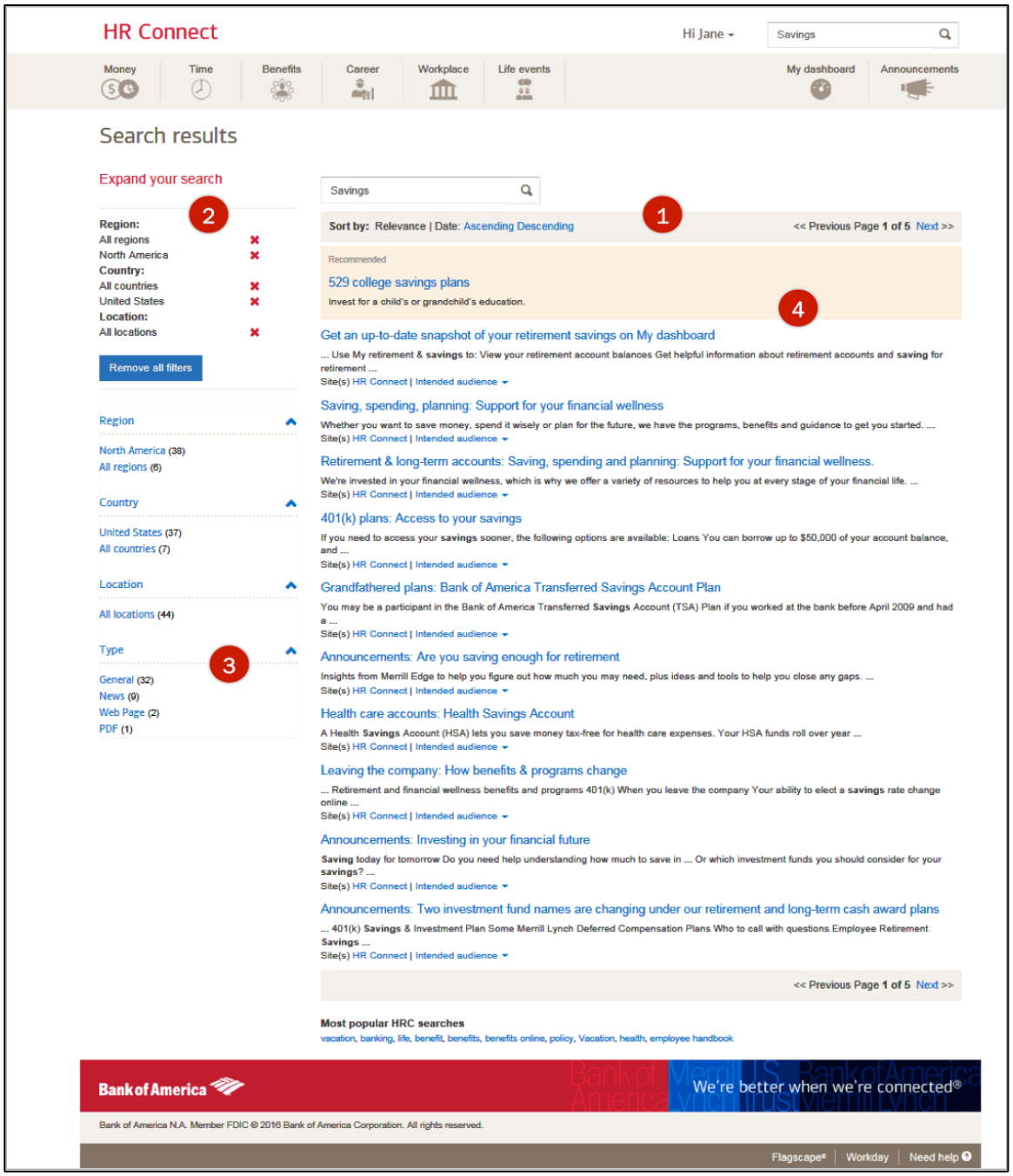
My Pay Highlights

1. **Easy access.** Employees can find information about their pay and benefits by clicking through the dashboard or navigating to the appropriate site section. For instance, pay information is summarized in the dashboard and is also available through the site's *Money* section. Site sections include second-level navigation options that are visible to users. Within *Money*, for example, visitors can navigate to *My Money* (the currently selected section above, highlighted in red), *Pay*, *Tax*, *Retirement plans,* and *Financial wellness*.
2. **Clear summaries.** Pages include clearly summarized information. *Annual pay*, for example, shows the current annual salary, the previous year's performance cash incentive, and the previous year's long-term incentive. Each item is explained briefly in clear text immediately below the graph; thus, rather than wading through wordy documents, users get quick and concise information.
3. **Quick links.** Quick links on the side of the page offer logical next steps in context. For example, links from *Annual pay* lead to *View your pay statements*, *Learn about the bank's incentive plans & awards*, and other related information.
4. **Contact information.** Each page includes contact information for related questions. The *Annual pay* page, for example, includes information about whom to contact in relation to pay, equity, and long-term cash awards, as well as a general contact for information on HR Connect.
5. **Feedback.** The HR Connect team is continually looking for feedback to improve the site. The side of the page includes a link to *Give Feedback* to the HR Connect team. The brief explanatory text nicely highlights that the feedback form has only three questions about the user's site experience.



Bank of America HR Connect *My Health*. On this *My Health* widget from the HR Connect dashboard, the *Show values* toggle is set to on, showing the personalized summary of the employee's information. *BankofAmerica_06_MyHealth_ValuesOn_live.png*

Search

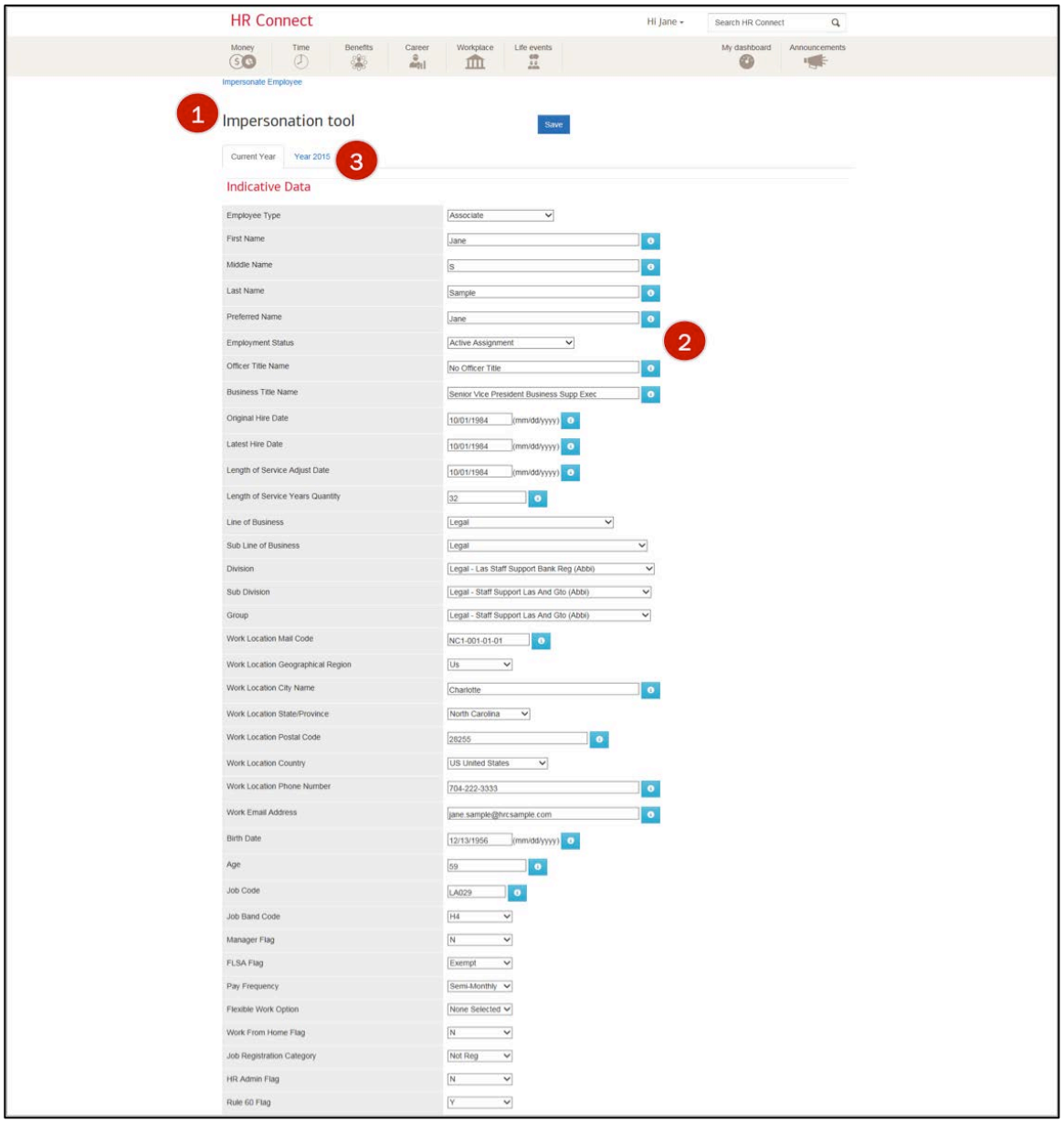


Bank of America HR Connect Search Results. This page shows the search results returned when a user searched for the word "savings." *BankofAmerica_07_search_results_live.png*

Search Highlights

1. **Google search.** HR Connect uses Google Search Appliance because the main Flagscape intranet already used it, so the HR content that was moved to HR Connect was already optimized for that search tool.
2. **Automatic filters for personalization.** The side of the page displays selected filters for *Region*, *Country*, and *Location*. These filters are selected and applied to the user's results to deliver the right policy and benefit information to the right users. For instance, a UK user who searches for maternity benefits will see UK-specific benefits information. Users can also remove these filters, such as when an employee who supports colleagues in other countries needs to find information for them. The site offers a simple one-click way to remove all filters, or lets users pick and choose which filters to remove.
3. **Additional filters.** Employees can also further narrow their options by selecting from the list of additional criteria for *Region*, *Country*, *Location*, or *Type* that appears to the left of the results.
4. **Recommended results.** Recommended results are used to help direct users to the best possible result for the query. Each month, the team manually searches the site's 500 most popular queries and reviews the results' value. If the results found are not high quality, the team adds a recommended result and works to improve the general search quality.

Impersonation



Bank of America HR Connect Impersonation Tool.
BankofAmerica_08_Impersonation_Tool_live.png

Impersonation Highlights

1. **Impersonation.** Given the complexity of giving each user an individualized experience on HR Connect, the team needed a way to let support personnel troubleshoot and test different site views. The Impersonation tool allows just that. The impersonation mode — which is accessed via a specific URL, given only to users with permissions — allows testing without having to find a user that meets a particular condition.
2. **Criteria.** The impersonation tool lets support personnel set up any combination of criteria, from employee type to hire date to pay frequency. Additional options (not shown in the screenshot above) include information such as whether the user contributes to a 401(k), works from home, receives childcare reimbursement, or makes commuter benefit contributions.
3. **Years.** Support personnel can make changes for the current year or the previous year, via tabs at the top of the page.

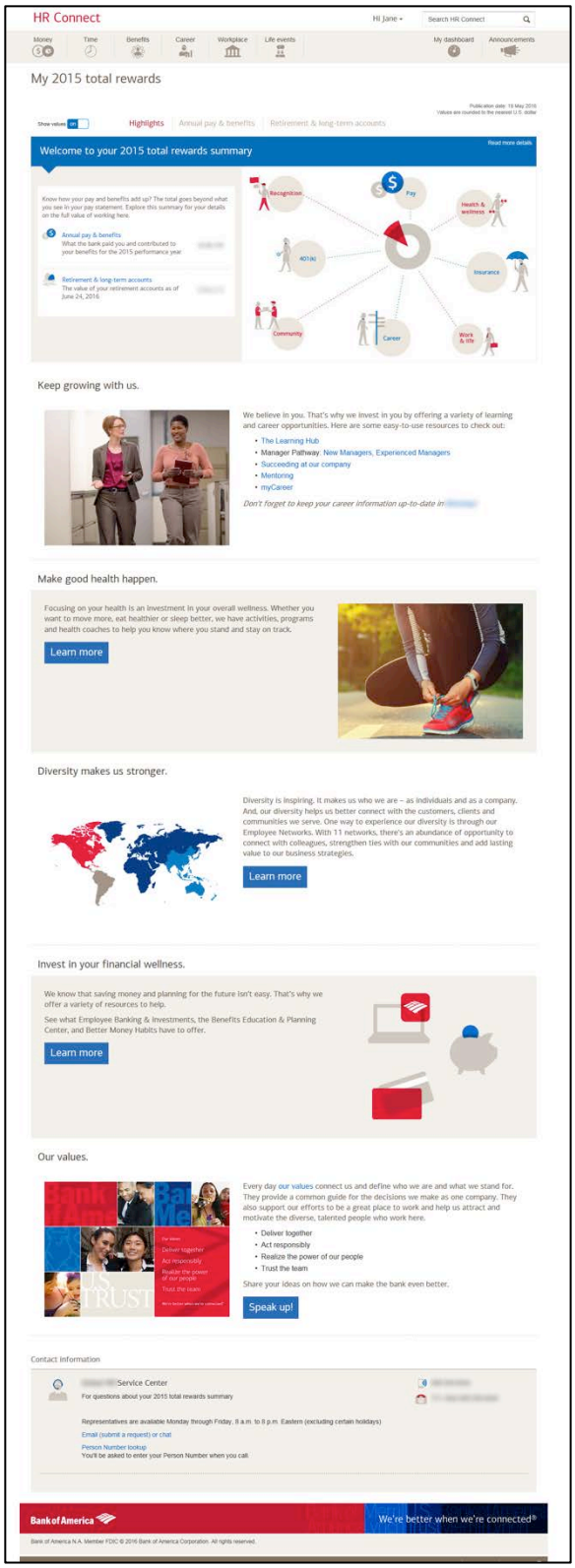
DESIGN PROCESS AND USABILITY WORK

Research

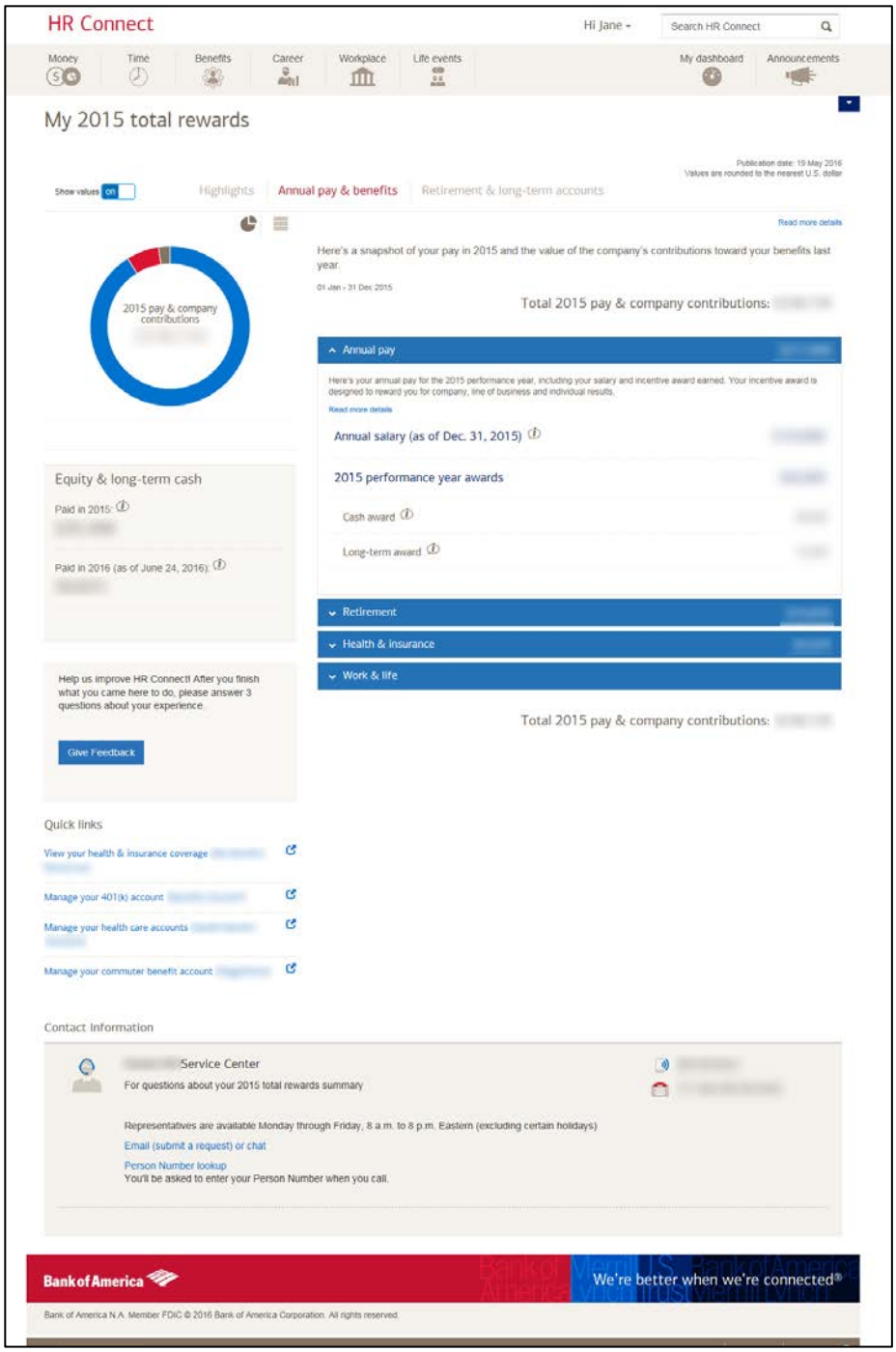
The Employee Experience Research team was involved in all project phases. During the concept phase, it conducted approximately 30 interviews with US and international new hires to understand how HR Connect's personal dashboard concept influenced job desirability. Areas that showed increased job desirability included work/life balance, tuition reimbursement, and mentoring and volunteering. These findings suggested content that should be highlighted.

During the predefine stage, the team developed personas through a series of interviews and used them to help the broader project team understand the end users and their goals. Team members also conducted prototype testing on the HR Connect landing page and dashboard. Card sorts and tree testing helped inform the IA (see below for more information on that process).

One challenge of designing this HR portal was balancing user desires with HR's intent to ensure that required messaging and navigation remain prominent. For example, in early usability testing, users preferred the personalized dashboard as the homepage over a prototype that focused on total rewards positioning. The solution was to redesign the HR Connect homepage to place the dashboard in a prominent location that was easy to access. The total rewards positioning was placed on the dashboard, and the landing page became a place to highlight other valuable content.



Bank of America HR Connect Rewards Summary. The landing page for the total rewards summary, which shows users their total annual pay and benefits and account balances for bank-sponsored retirement accounts. The sections below illustrate what the company calls the benefits "beyond the numbers," which are key benefits and programs that the bank offers employees that are not easily quantified. This page shows five personalized benefits and programs that all users participate in, which is representative of each user's snapshot of benefits and programs. *BankofAmerica_09_TRS_highlights_live.png*



Bank of America HR Connect *Annual pay* Tab. This tab shows a detailed breakdown of an employee's total annual pay, retirement, health and insurance, and work and life benefits. The tab includes the company and employee contributions for the prior year. The left rail has an intercept survey that the company uses to gather feedback.
BankofAmerica_10_TRS_annualpay_live.png

Design

The team used the results of the employee experience research as input for the design approach. The design approach also included design critiques with HR SMEs, preview sessions with the core project team, demo days, and working sessions with the company's agency partners.

The design critiques were used to evaluate ideas, identify future directions, and make changes and updates, and were included as part of the requirements sessions with the SMEs. The goal was to finalize the approach in a visual format. After each design critique, the User Experience Design team held preview sessions with the core team to show the progress of visuals. Biweekly demo days with the core team and SMEs were used to show the final refined prototype and gain agreement before starting visual design of the prototype and branded comps. When ready, the branded comps were shown to the SMEs and core team for approval; thereafter, presentation-layer coding began.

After the requirements and early design phases, the team also held iterative work sessions with its agency partners to help integrate all of the various deliverables across work streams for the content build. After these work sessions, the team was able to make key decisions about the IA, navigation, and page templates. These sessions yielded the following goals.

Information Architecture

- Create a site focused on core activities that users perform (that is, a task-based approach) and include
    - Dynamic quick links that link to the next set of user tasks
    - Focus on sample tasks, such as: "I want to (view, learn, understand, change, update) …."
- Support core activities, with links to secondary activities
- Make the site contextually meaningful by integrating content; for example, primary content should focus on core tasks and display meaningful personalized data about the user

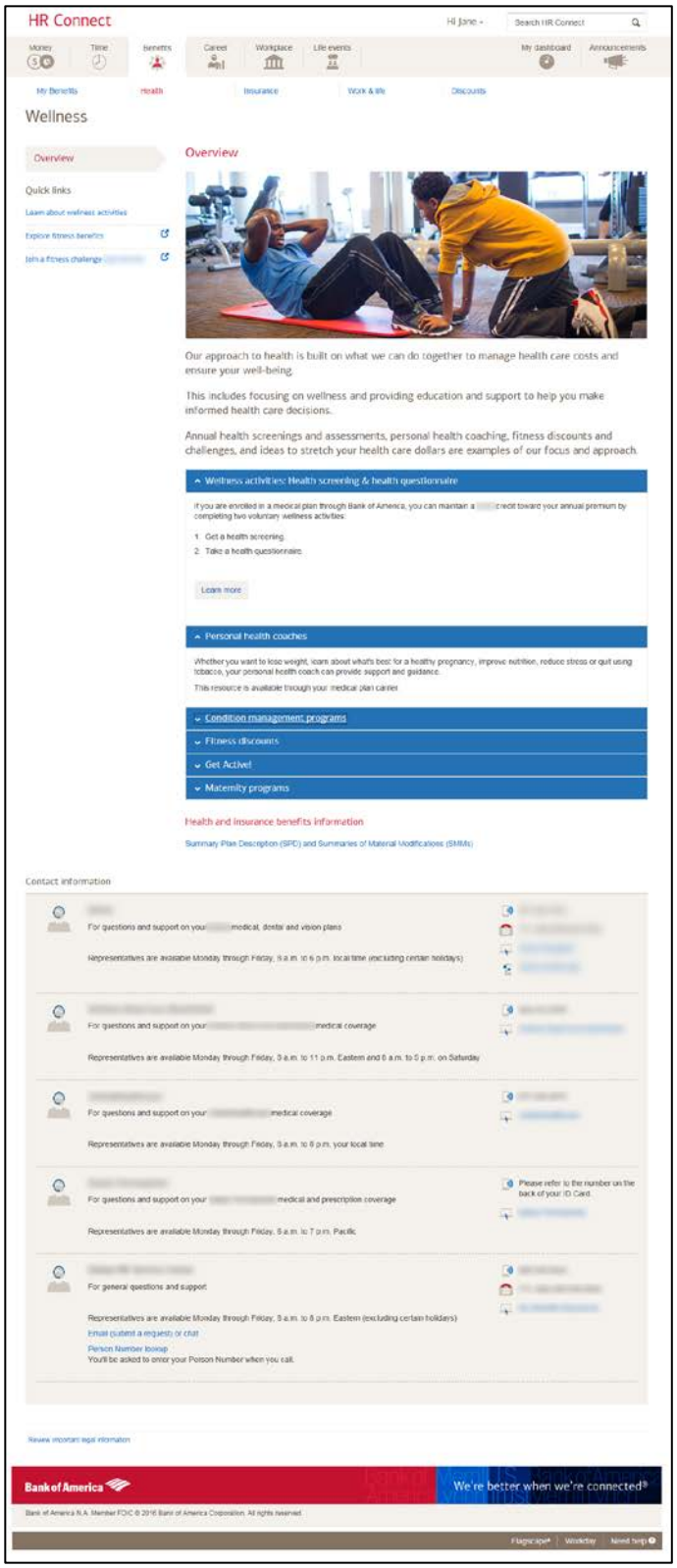
Navigation (three-level megamenu)

- Design menus that allow users easy access to the site and
    - Provide consistent navigation that exposes content for quick access
    - Keep parts of the megamenu exposed when users are inside a section
    - Allow for in-page menu access when users are inside a page
- Take advantage of cross-reference and in-page links
- Ensure that top-level navigation contains primary content categories that reflect how users think about taking action
- Use a megamenu to show all of content that can be accessed within a section

- Ensure that subcategories persist within a primary section to help users remember what they can do next

Page Templates

- Create personalized content pages
- Use the dashboard for easily accessible personalized content
- Provide a standard set of content templates for all content views and use them across the site for a seamless feel
- Give the content team maximum flexibility on layout and display
- Keep in mind both ease of use and system maintenance
- Accommodate cross-referenced information
- Standardize the ways in which users will access lower-level content



Bank of America HR Connect Sample Wellness Content. Sample content page for *Wellness*, which is located in the *Benefits* section under *Health*. Secondary navigation is on the left for most sections; beneath it are *Quick links* that provide at-a-glance access to key websites and resources. *BankofAmerica_11_Wellness_live.png*

Research to Inform the IA

During the predefine phase, the Employee Experience Research team designed and facilitated a content inventory assessment on the current HR intranet. The team suggested ongoing usability research to ensure content effectiveness, making it usable and useful.

Team members also conducted two card sorts with 85 employees and 85 managers. Card sorts were suggested when the core business proposed four navigation labels for the homepage menu. In using card sorts, the team's goal was to understand how employees and managers would organize and label the broad homepage categories. The open card-sort activities proved beneficial, and participants provided useful label suggestions, defining the five categories that influenced the current IA.

Once the card sorts were complete, the team reviewed NN/g's best practices on megamenus and then conducted a series of tree tests on various megamenu iterations to ensure users could find what they need.

The card sorts and tree tests were created using an online remote tool, and users accessed the activity via an email with a link to the studies. The content to be sorted was derived from the top task analysis data, intranet page views, and search terms, as well as from a subset of the content inventory. Surveys and data mining were used to understand and validate the top tasks for employees and managers.

The research team also established usability measurements that it tracked over time. For example, team members created baseline measurements such as time on task (for 50 tasks), tree tests (to measure find ability), and surveys (to measure general satisfaction). They also implemented "true intent surveys" on key pages of the HR portal to understand, in real time, the tasks or goals users were trying to accomplish.

Adoption and Buy-In

One of the biggest challenges of an intranet project is getting buy-in from the organization and enticing people to use the new site. The Bank of America team used a multifaceted approach to ensure an effective rollout and continuing engagement.

The organization has a well-defined governance structure that regularly updates HR leadership. HR designees representing each line of business review upcoming changes, obtain input on the best way to communicate to the lines of business and unique employee populations, and share information with line-of-business leaders. "We use a variety of methods when communicating information about our HR portal," says Kristin Schultz, User Researcher Specialist, "including news articles, demonstration sessions and replays, manager and employee emails, quick reference guides, brief videos, and resources for managers to use in team meetings and huddles.

"For HR Connect go live, we also had a communication sustainment plan to reinforce the use of the content, dashboard, and other features," she says. "Even with all of these methods, we always have to balance the amount of change impacting our employees."

Working with Outside Agencies

The internal team worked with two outside agencies to understand best practices for the site map and IA, UX design, style guidelines, and the naming analysis and linguistic review, as well as for developing generic and variable content.

GOVERNANCE

The Bank of America intranet team is comprised of three key groups from across the organization: Enterprise Communications, Global HR, and Global Technology & Operations. Enterprise Communications owns the enterprise intranet Flagscape. Global HR provides subject matter expertise and strategic direction, specifically to HR Connect, which is a part of Flagscape. The Global Technology & Operations team is responsible for site design, development, maintenance, operational infrastructure, and technology enhancements for both Flagscape and HR Connect. These groups have a strong partnership aimed at designing, developing, implementing, and maintaining HR Connect in way that ensures an optimal employee experience.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
HR Connect Business Team	Provides strategic vision for future enhancements and key priorities Ensures integration with core HR functions and service providers Defines business requirements, provides input to design staff, conducts user acceptance testing, and validates content and data Coordinates content and link updates with Communications and Channels departments and performs content validation Researches production issues and answers employee questions as needed Monitors production support incidents and file loads Performs data analysis as required to support business requirements Compiles monthly usage metrics and analyzes user behavior
Employee Experience Research Team	Gathers employee feedback through various methods (tree tests, card sorts, surveys, interviews, focus groups), compiles results, and recommends opportunities for improvement Provides guidance to integrated team on employee experience considerations
Design (UX) Team	Maintains end-to-end UX, design, and branding for the platform
Development Team	Oversees content input and management within the CMS Ensures search engine optimization for site content
Project Management Team	Manages end-to-end project deliverables, milestones, budget, risks, and issues during the project
Global HR Communications Team	Develops overall content for web pages, personalized data displays, news articles, announcements, and notifications as part of ongoing editorial management process Maintains a schedule of news articles, announcements, and articles for site-related content

	Proofreads content additions and changes Ensures consistency of tone and voice in content
Technology/Production Support Team	Develops, tests, and deploys system changes Manages incidents and resolves as needed Monitors system stability Ensures integration with various data sources to provide accurate personalized information for the dashboard and summary Designs and develops portal platform administration screens, site structure, and backend systems as needed

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://hrconnect.bankofamerica.com/portal/site/hrc15010092/
Default Status	Flagscape, the enterprise intranet, is the main homepage for all Bank of America employees. Employees can access HR Connect from the global navigation on Flagscape via the HR Connect tab or through the toolbar link at the bottom of the browser window under *Essential links*.
Remote Access	Employees can access HR Connect from home, including with mobile devices, through VPN. Access from home, separate from VPN, is scheduled to be available in the near future.
Shared Workstations or Kiosks	In the company's financial centers, employees can access HR Connect from shared workstations, which require them to log in using their personal credentials.

TIMELINE

PROJECT MILESTONES	
Item	**Status**
August 2014–February 2015	**Employee experience research:** personas, content audit, card sorts, tree tests
August 2014–February 2015	Business requirements
October 2014–April 2015	**UX design:** wireframes, branded mock-ups, system design
April–August 2015	Content development, review, approval
March–September 2015	System development
September–November 2015	System integration, user acceptance testing
September–December 2015	Online content validation and proofing
January 2016	Launched HR Connect (version 1)
June 2016	Added total rewards feature for US employees (version 2)
Overall redesign timeframe: One year and 10 months	

CONTENT AND CONTENT CONTRIBUTORS

Content Management Process

Business owners and their corporate communications partners identify content changes; the communications partners then develop the new or changed content and submit it to the HR Connect team, which reviews it for consistency and tone. Once approved, the change is staged in a preproduction environment where it awaits final approval by the communications partners and business owners.

HR Connect is employee-focused and content is written in a conversational style and tone. The site is easy to understand, and it makes resources and contact information readily available. If managers need specific content to support their employees, the team will write it, targeting it as needed.

Culling Content

Team members culled, organized, and moved content from the company's former HR pages on Flagscape to HR Connect. In the process, they thoroughly inventoried all Flagscape content, analyzing the information and determining the purpose of every page. They then identified the best way to consolidate or repurpose content and remedy any gaps. This process led the team to create and map the IA.

Once the IA was in place, team members created a template for the content copy decks to ensure everything was in a standard format. Communications created a first draft in the template, which was shared with the line-of-business Communications manager. From there, it was shared with business SMEs. Once all feedback had been

consolidated, the copy deck moved back to the Communications team for additional clean up and consistency checks. Prior to launch, the HR Connect business team held demonstrations with the business executives, so they could see their content in a test environment online.

Content Inventory: A Critical Step

As part of the initial content migration from the company's Flagscape HR pages to HR Connect, team members endeavored to take detailed process information (how-to content) and make it available at the transaction point (such as in Workday) rather than on HR Connect. If that was not possible, they placed process content in standalone discovery documents that could be linked to from HR Connect. These documents can be updated easily as processes change, without disrupting intranet page content. It also keeps the site's pages visually cleaner and easier to read.

The team's thorough content inventory was critical to determining where the cross-reference points needed to be. Another key factor was developing the IA strategy before writing content. This helped ensure consistency of direction and employee experience, as well as easy-to-understand section labels; it also enabled content development to drive the supporting subsections as needed.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Oracle 11g • Solaris • Apache 2.2.31 — 64 Bit
Bug Tracking / Quality Assurance	• Quality Center
Design Tools	• Axure RP PRO • Adobe Creative Suite
Site Building Tools	• Java, JavaScript, Bootstrap, High Charts, Open Text APIs, jQuery • Open Text Portal, Open Text Dynamic Portlet Module • Maven for build • Subversion for source control
Content Management Tools	• Open Text Web Experience Management • ePhox Web Editor
Search	• Google Search Appliance

Technology Evaluation

Deciding which platform to use on the backend required some winnowing based on constraints, followed by a comparison of the technology and capabilities of OpenText Portal vs. Oracle WebCenter Portal. Due to the existing application RFP process, application proof of concepts and existing technologies, all other portal technologies were out of scope. The assessment approach was used to analyze the tools' various technical components and functional feature executions. The team used several approaches for gathering information in this assessment, including

- A technical questionnaire
- Proof of concept comparison
- Technical components comparison
- Functional execution comparison
- Third-party technology documentation

ROI

The company's objective with HR Connect was to deliver an integrated HR portal that would give employees quick access to information and content, along with a pathway to all their needed HR tools and transactions. Since implementing HR Connect, the team has collected employee feedback through online surveys and interviews. The

majority of employee feedback regarding the site's look and feel has been positive. Employees say the online HR experience has made huge strides forward and the new gateway to HR tools and applications is comprehensive, yet easy to navigate and use.

"We have been delighted with the employee response," says Schultz. "It is increasing employee satisfaction and engagement, and creating a greater return on investment in employees for the organization at large."

The following employee comments have been received through online surveys:

> "Awesome layout. Very pleased with the new site and ease of use."
>
> "I love it! The new site is awesome. Definitely an improved experience. It is nice to have everything centrally located. Great work. Thank you!"
>
> "Very user friendly & intuitive. Love it."
>
> "I really like the new site, especially the dashboard. Great improvement. Thank you."
>
> "Nice, new, and easy to navigate layout... all in one place!"

The team collects usage metrics on a monthly and quarterly basis, including visitor metrics, top page visits, and top searches. Following is a summary of second quarter 2016 visitor metrics regarding usage.

Visitor Metrics	Q2 2016 Total
Unique visitors	~200k
Employees who visited once	~35k
Employees who visited more than once	~165k
Average number of visits per day on weekdays	~30k

LESSONS LEARNED

LESSONS LEARNED		
Process Area	**Challenge**	**Solution**
Documentation	The Development team had an excessive number of documents to refer to during the design/development stage, including business requirements, use cases, wireframes, data elements, HTML/CSS, branded comps, and a traceability matrix.	Minimize the number of links in business requirements and aim to create a single document when documenting requirements; in this case, the Bank of America team eventually placed a panel on every page of the Axure prototype, with links to all the documents needed to design/code that particular page
Documentation	With so much variable and customized content, better-defined use cases were needed for every flavor of web page and messaging to accommodate multiple roles and views within the site.	Include more time and resources during requirements gathering to document use cases prior to business requirements sign-off and handoff to technology team
Process	The team needed a two-week code lockdown between user acceptance testing (UAT) and deployment, meaning that no changes should occur in the UAT environment during that time.	Account for the two weeks of code freeze between UAT sign-off and deployment day in the timeline
Process	Activities dependent on each other should not be performed in parallel. For example, the design processes for the Data and Development teams should not be concurrent.	Minimize overlap of activities while developing the project timeline and ensure that risks are called out if overlap is required
Content Validation	Too much time was spent validating links across multiple environments during testing.	Rather than spend time pointing links to development (DEV) and system integration test (SIT) environments, point them only to production and testing at the right time
User and Employee Experience Research	Timeline and key activities must be purposefully planned to allow time for UX	Have more UX sessions as part of future HR Connect releases to gather feedback and address

	activities.	issues prior to development
Information Architecture	The IA strategy must be developed prior to writing content.	To help ensure consistency of direction and employee experience, create easy-to-understand section labels and finalize IA prior to writing content

BEST PRACTICES

- **Deliverables.** The Data team created a dashboard view to help make design and development clearer and more efficient.
- **Testing activities.** During testing, SME testers were brought in for a three-day in-person testing cycle. It was a key part of the testing success. The take-away from this success is that teams should clearly define the scope and goals of on-site testing; confirm system access for each tester prior to arriving on-site.
- **Design meeting.** A weekly meeting was dedicated to working through design questions, as well as to engaging the entire team to increase awareness and encourage input. This approach was so helpful the team continued using a weekly design meeting for future releases and also for business-as-usual changes.

Santander Group

OVERVIEW

COMPANY

Banco Santander's commercial model aims to satisfy the needs of all types of customers, including individuals with different income levels, companies of any size and various activity sectors, private companies, and public institutions.

Headquarters: Madrid, Spain

Company locations: The Santander Group has a balanced geographic distribution and high market shares in each of its 10 key markets: Spain, Germany, Poland, Portugal, the UK, Brazil, Mexico, Chile, Argentina, and the US.

Locations where people use the intranet: Currently, all users have access to the same group of portals, according to their roles in different countries. In this phase of the new intranet's release, the company accomplished a redesign that serves its first user group at the company's headquarters in Madrid, Spain.

Annual revenue: In 2015, Santander achieved profit of €5,966 million, with a market capitalization of €65.792 million (euros)

THE INTRANET

Users: The Santander intranet is divided by countries. Each country has an intranet based on the Santander intranet model. There are currently 200,000 people using this intranet architecture. The first users of the new intranet are located at the company's headquarters. These people need to access a lot of information, including processes, applications, and the ability to communicate with colleagues from other countries. They also need to share information and documents with other business areas, and they need a modern, innovative, and dynamic intranet that opens up possibilities for other types of communication in future releases.

Mobile approach: Responsive web design

Technology platform: Liferay v6.2, SharePoint 2013, and HTML/CSS/JavaScript

TEAM

Design team: The intranet team is large and spans many roles and tasks. Its members include many other colleagues not listed here.

Leadership: Ana Olabarria, Channels Director; Antonio Alberto Lopez, Portals Manager; Bosco de Dompablo, Portal Project Manager; Lola Ruiz, Security Team Leader; Javier Lopez, Collaboration Manager; Ernesto Rubio, Collaboration Team Leader

Design: David Gil, Usability Manager; Patricio Becher, UX Project Manager; Sergio Cabrera, Creative Director

Development: Santiago Muñoz, Portals Centro Excelencia Director; Miguel Ángel Sanz, Portals Manager; Jose Manuel Organero, Team Leader; Ruben Laso, Developer; Juan Saiz, Design Leader; Eva Pardo, Analyst; Alejandro Barco, Team Leader

Architecture: Angel Redondo, Security Director; Eduardo Calderon, Security Architecture Manager; Jaime Perez, Security Architect; David Fariñas, Software Architect; Julian Nieto, Software Architect; Piedad Garcia, Functional Architecture Manager; Jorge Llano, Functional Architect; Jesus Flores, Technical Architecture; Oscar Zapater, Technical Architecture

Deployment: Santos Montoro, Corporate Area Director; Antonio Martinez, Portals Manager; Eduardo Martin, Collaboration Manager; Luis Ángel Pérez, Portal Leader; Tomas Iglesias, Security Leader; Felipe Rivilla, Content Catalogue Leader; Oscar Sanchez, Service Manager; David Resco, Portal Leader; Jorge Pantoja, Portals

Operations: Nuria Paton, Multichannel Director; Ricardo Barrientos, Multichannel Leader; Ruben Plaza, Contribution Team Leader; María José Luceño, Content Contribution; Marta Gonzalez Leon, Content Contribution

Communication: Alberto Baltanas, Internal Communication Director; Elena Mercader, Internal Communication; Jose Manuel Valverde, Internal Communication; Virginia Garcia, Internal Technical Communication

Technology & Operations: Patricio Barrena, Portals Manager; Daniel Ardines, Portal Project Manager; Daniel Magdalena, Community Manager; Maria José Álvarez, Portal Project Manager; Isabel Jimeno, CIO

INTRANET TEAM



Team members shown here (left to right): Alberto Baltanás, Felipe Rivilla, Eduardo Martín, Oscar Sánchez, Jorge Pantoja, Luis Ángel Pérez, David Resco, Eva Pardo, Antonio Martínez, Rubén Laso, Maipi García, Lola Ruiz, Jorge Llano, Miguel Ángel Sanz, Julián Nieto, Santiago Muñoz, David Fariñas, Ana Olabarría, Ernesto Rubio, Virginia García, Jaime Perez, Patricio Barrena, Bosco de Dompablo, Ángel Redondo, Antonio López, Eduardo Calderón, Alejandro Barco, Daniel Ardines, Elena Mercader, José Manuel Organero, David Luis Gil-Esteban, Juan Saiz, and Sergio Cabrera.

HIGHLIGHTS ABOUT THIS WINNER

A company-wide digital transformation process combined with employee requests for a modern, innovative intranet gave the Santander intranet team a perfect opportunity to greatly improve on an already helpful intranet. With previously evolved communication, collaboration, and personalized tools, the team analyzed employees' habits to further strengthen these areas and, indeed, it worked. The team created an up-to-date, on-brand look that's engaging, and innovatively designed menus slide from nowhere and seem to generate additional screen real estate.

The intranet also seeks to unify 200,000 employees from multiple companies, job roles, and countries. To help meet this goal, the new design fosters use of social media and other communication approaches. Plus, the new design encompasses a scalable design model that can extend to the other companies of the Santander Group. This is a big step in the right direction for establishing a common framework for all employees.

- **Versatile page layouts.** The flexible templates let contributors present content to employees in the best possible layout, rather than having to stick to limited page templates.

- **Secure.** To say that security for a financial intranet is vital is an understatement. With this in mind, the team started its design by outlining a high-security model. Also, team members worked through the many challenges that come with implementing single sign-on, which helps eliminate the security breach of writing down passwords, which users often do when asked to remember multiple passwords.
- **Productivity applications for work.** The intranet includes more than 100 banking applications, which people can easily find and add to their bookmarks. Depending on the need and application, users can open any one of these applications may be opened as either an integrated intranet element or in a new window.
- **Menu panels.** Social channels and the user's portals are personalized by role and are available in expandable panels, which can be opened via icons. These panels are available in one click on every page of the site, but are tucked away by default to economize on valuable screen real estate.
- **Personalized.** The user's role dictates everything from their menus to their search results. This is especially helpful when dealing with such a large amount of content created for employees in such a wide variety of offices, countries, and jobs.
- **Multi-language.** The intranet is available in Spanish and multiple other languages depending on the country in which the employee is based.
- **Microsite for corporate culture.** A corporate culture campaign is thoroughly described and supported on a microsite, helping to instill the same corporate values and norms in all 200,000 employees.

BACKGROUND

The need to define a new intranet model arose as part of the digital transformation process the Santander Group is currently undergoing, as well as from the employees' request for a modern, dynamic, and innovative intranet. This employee demand was revealed in an ideas competition that Santander Bank conducted with its employees. The need for a better intranet rose to the top of the list of ideas requested as part of this competition. Previous to this redesign effort, the Santander Group intranet had evolved organically over time.

Goals

The organization outlined four goals for this major redesign project:

- **Focus on people.** Offer an attractive, logical, and efficient UX with an innovative approach that focuses more on people than processes, and develop an attractive design suited to the company's increasingly technology-minded users.
- **Improve efficiency.** Improve the efficiency of business processes by analyzing user habits, and customize the experience based on roles, enabling people to do their work quickly and safely.
- **Facilitate connections.** Foster social media within the organization by bringing together people from different companies and countries across the Group to expedite employees' day-to-day tasks.
- **Plan for the future.** Create a scalable model, which is easy to implement and adopt, in order to extend its implementation to the Group's other companies, with the ultimate goal of establishing a common model for all employees.

Challenges

To meet these project goals, team members knew they would encounter many challenges, including the need to provide

- A bidirectional communication channel for employees, so that the Bank and its employees can maintain active dialogue
- Access to tools with minimal clicks, to avoid unnecessary actions that may distract user attention
- Quick and easy access to the information employees need to carry out their work (both local and corporate)
- Access to the business processes required to perform work tasks and provide customer service
- Access to individual/personal employee information and HR processes that are specific to each employee, while maintaining the privacy of more sensitive content
- Access to training platforms
- Access to the Group's services for employees, such as hairdressers, medical centers, supermarket purchases, and childcare

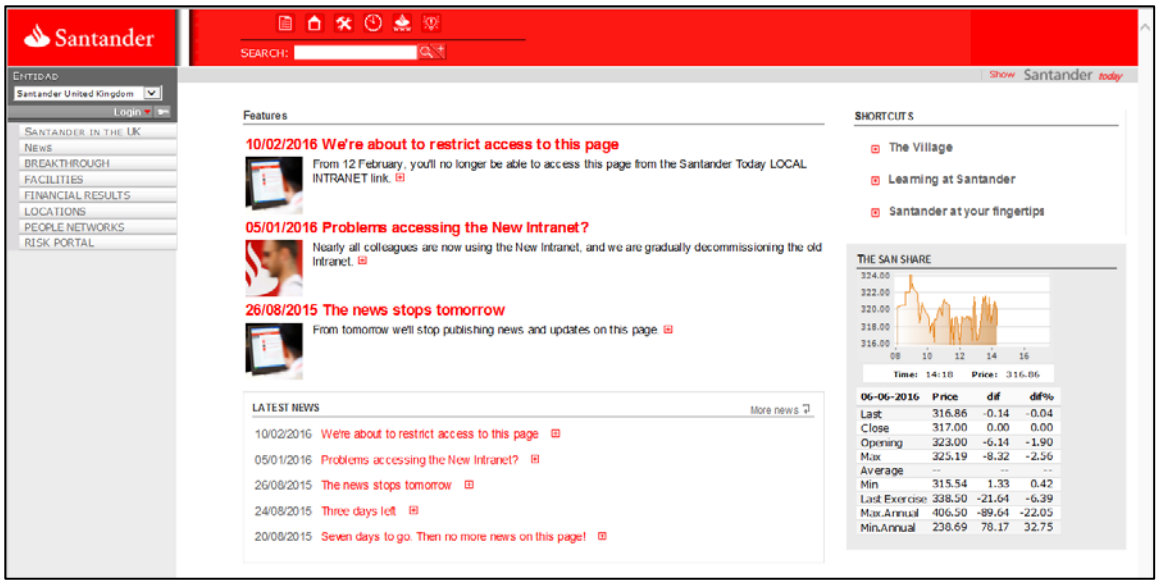


Image 12. Santander Group Intranet Old Homepage. The old homepage design had many shortcomings. For example, portals worked only with a few page templates, so portal managers had very little design flexibility. In each template, portal managers were unable to place components where desired. In addition, portal access (through the carousel on the top right) wasn't usable, so the task of reaching hidden portals was slow and not intuitive. *Santander_01_Screenshots-of-the-site-before-you-made-changes_1_Version.png*

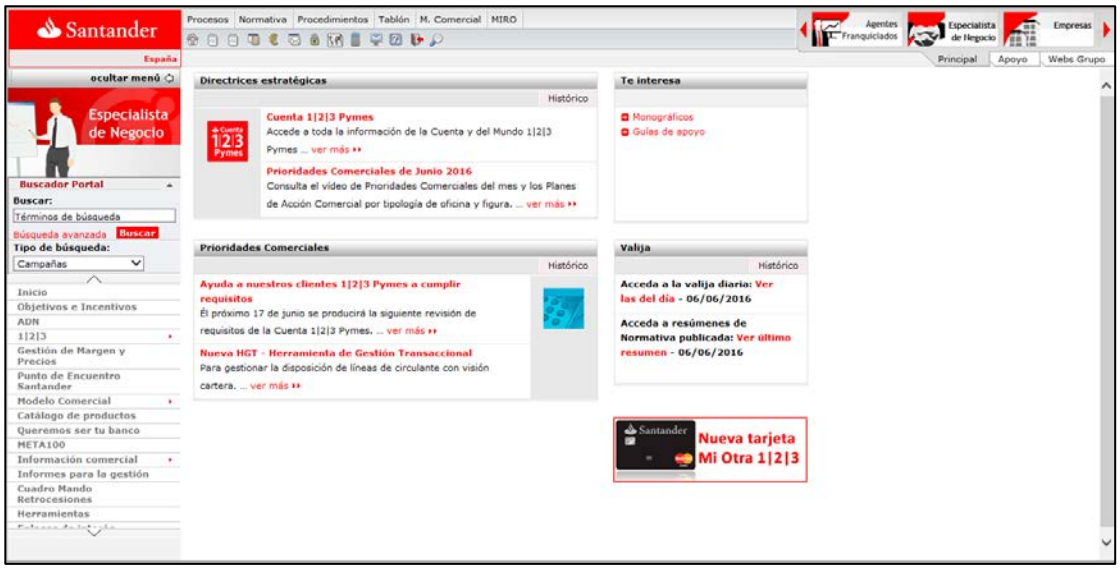


Image 13. Santander Group Intranet Old Homepage. Another view of the intranet prior to the recent redesign. *Santander_02_Screenshots-of-the-site-before-you-made-changes_2_Version.png*

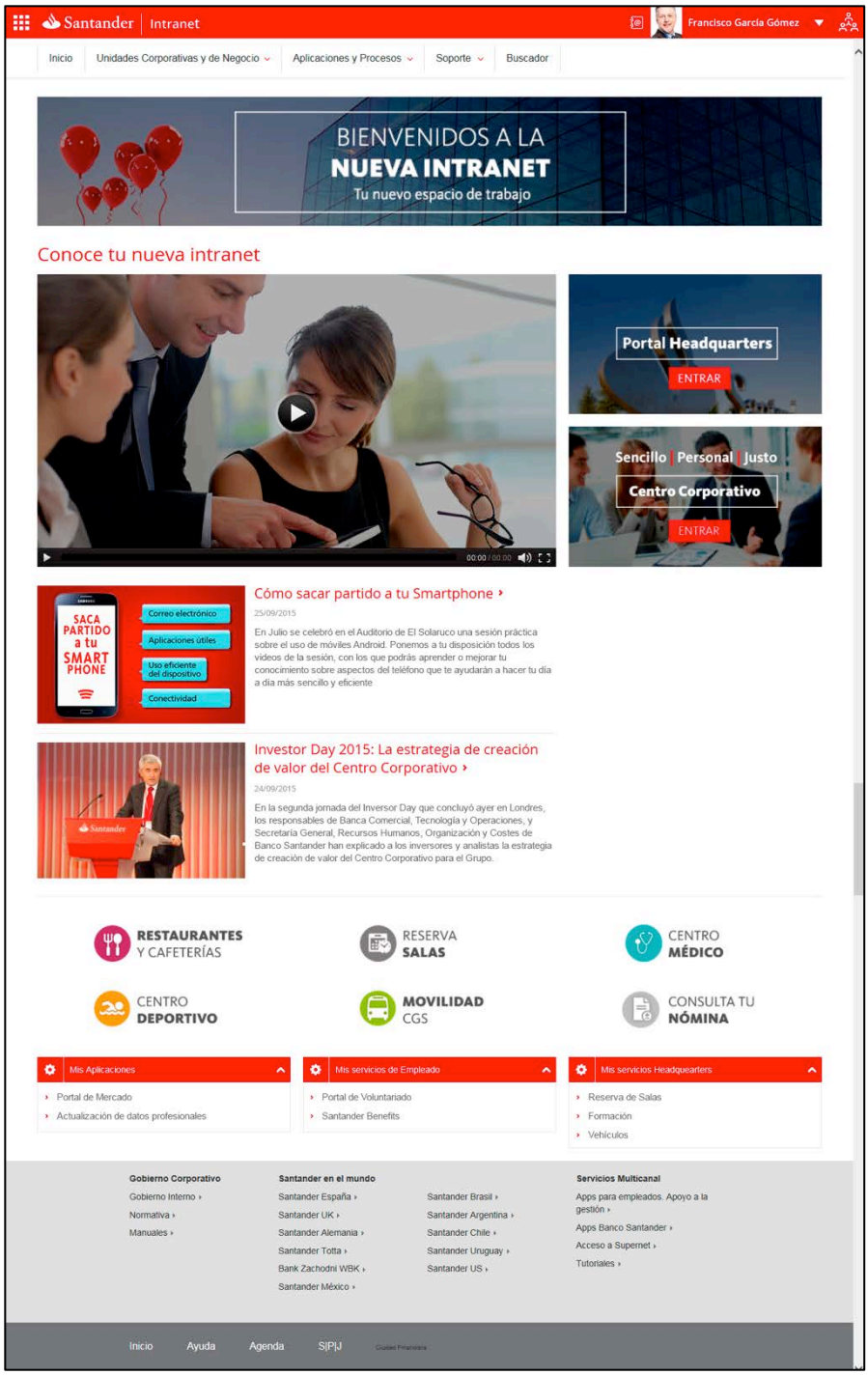


Image 14. Santander Group Intranet Homepage. An older version of the newly redesigned Santander intranet homepage with a large, attractive video story in the upper left. *Santander_03_Homepage_Live.png*

DESIGN REVIEW

Homepage



Image 15. Santander Group Intranet New Homepage. This shows the new intranet homepage with a new three-column layout and no large hero or carousel. The new homepage utilizes dynamic backend pages. *Santander_04-Current-Home_Live.png*

Homepage Highlights

1. **Welcome banner.** The welcome banner at the top of the homepage lets employees know the intranet has a new design. It communicates that employees can access work tools and get updates on the latest company happenings. This banner has been updated a few times since the intranet launched.
2. **News.** The Marketing & Communication department writes the news articles and chooses which ones will appear on the homepage. The news items are about everything from local items, such as *Recuerda que durante tus vacaciones puedes ceder tu plaza de parking* (Remember you can share your parking space while you are on vacation), to general items for everyone at the organization, such as *¿Te vas de vacaciones? Sigue estos consejos* (Are you going on vacation? Follow this advice) and *Vuelve la colección Banco Santander* (The Santander Bank art collection is back).
3. **Common links.** Based on user research, the team determined which links employees use most often; it then added these links to the bottom of the homepage so users don't have to hunt. Memorable, easy-to-recognize icons and brief labels indicate links to the following sections: *Restaurantes y Cafeterías* (Restaurants and Cafes), *Reserva de Salas* (Meeting room reservation services), *Centro Médico* (Medical Center), *Centro Deportivo* (Sports Center), *Cesión de Plaza* (Parking space sharing), and *Movilidad y Parking* (Mobility and Parking).
4. **Social icon.** Visitors can quickly access the "social canvas," which includes social channels, by clicking the three-people icon in the upper right corner. The content on the homepage and other pages is prioritized by default, but social elements are a click away on any intranet page. Users can also click the icon to close the social canvas.
5. **Portals icon.** In the upper left corner, a small nine-squared icon appears that opens a menu of various portals available to the logged-in user.
6. **Footer.** Items in the footer help employees access handy links related to the public-facing websites, corporate governance, the help center, press releases, Santander brand templates, and other resources. The three headings in the footer arrange the links by three topics: Corporate Governance, International Santander Bank internet sites, and Multichannel Services.

Social Canvas, Activity Stream



Image 16. Santander Group Intranet Social Canvas. The social canvas can be opened at any time to expose social channels accessible to the logged-in user. *Santander_05_Activity-stream_Live.png*

Social Canvas, Activity Stream Highlights

The intranet offers a panel with links to the organization's social channels. The social canvas opens and closes by clicking the three-people icon in the top right of all pages. The icon and panel is a helpful, creative solution to making all social channels available from all intranet pages. Three vertical icons within the panel lead to the most common social channels:

1. **Activity**: A social network wall (similar to Facebook).
2. **My contacts:** The logged-in user's contact list.
3. **Social links:** Wikis, communities, Yammer, and so on.

Social Canvas, Connections



Image 17. Santander Group Intranet Social Contacts. A list of the user's social contacts; each contact can be quickly called, video called, chatted with, or emailed. *Santander_06_Connection_Live.png*

Social Canvas, Connections Highlights

1. **Social connections.** Names and photos of social connections are listed in alphabetical order. Hovering over a contact displays several options for communicating with that person, making it very easy for employees to contact each other and collaborate.
2. **Search.** An open search field expedites finding a connection.

Communications, Options

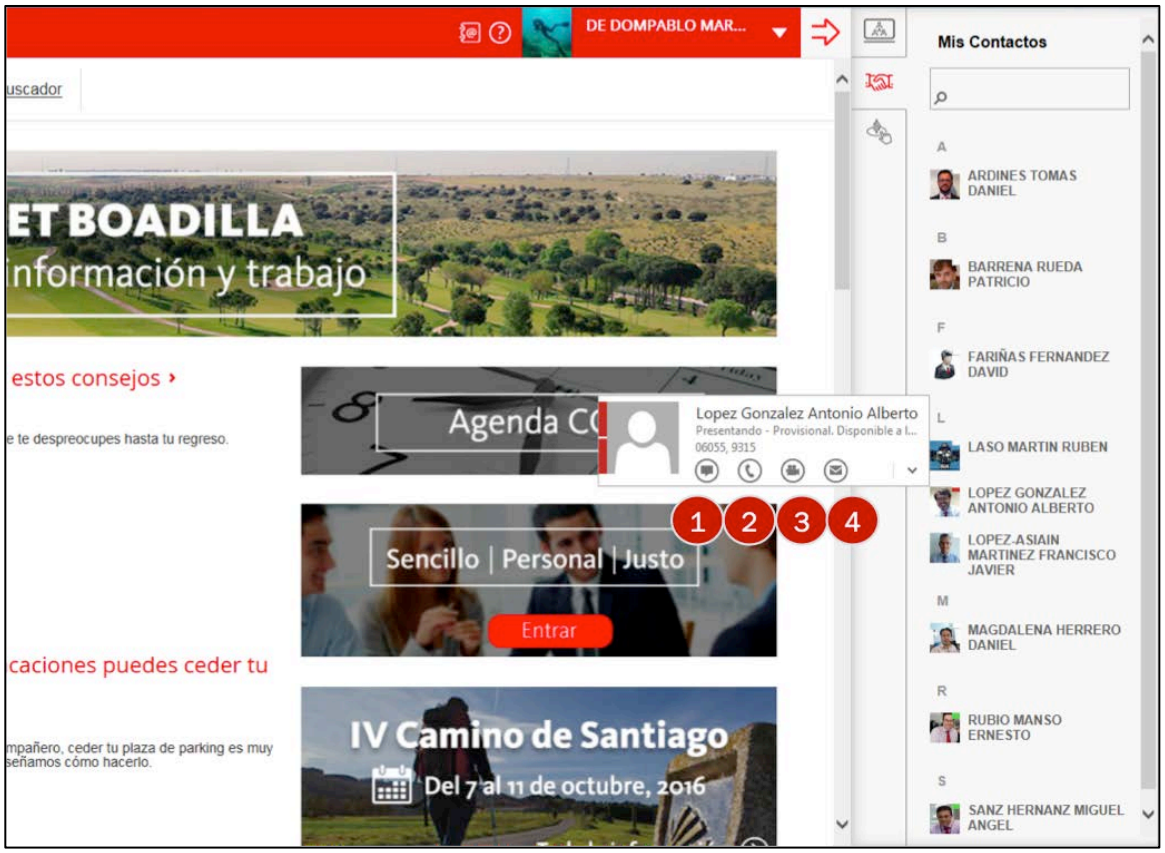


Image 18. Santander Intranet Social Canvas. The social canvas may be opened at any time to expose the social channels to which the logged-in user has access. *Santander_07-Communication-options_Live.png*

Communications, Options Highlights

The intranet makes it easy for employees to communicate with each other online, in any way that suits them. Hovering over a connection lets users click to do any one of the following:

1. Chat
2. Call
3. Videoconference
4. Email

Communications, Chat

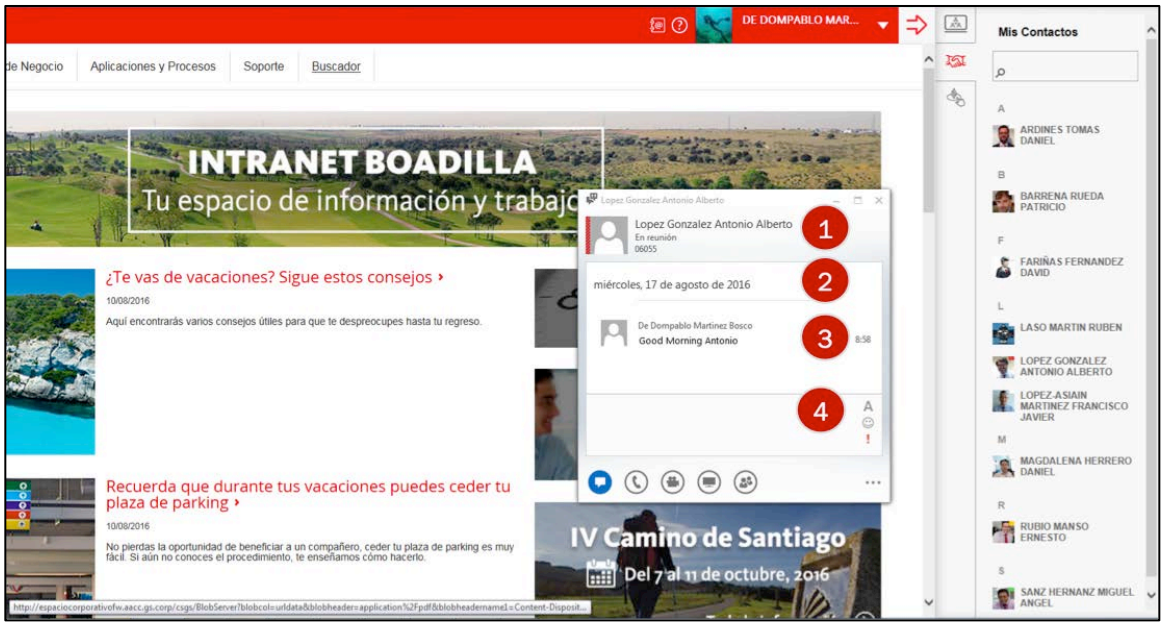


Image 19. Santander Group Intranet Chat Window. The chat window displays the people on the chat and the date and time. *Santander_08-Communication-chat_Live.png*

Communications, Chat Highlights

1. **Parties:** The names of the people chatting are listed at the top.
2. **Day and date:** The day of the week and date of the chat appears near the top.
3. **Time:** The time of the chat is also visible.
4. **Field:** An open field accommodates a few lines of text and icons.

Communications, Call

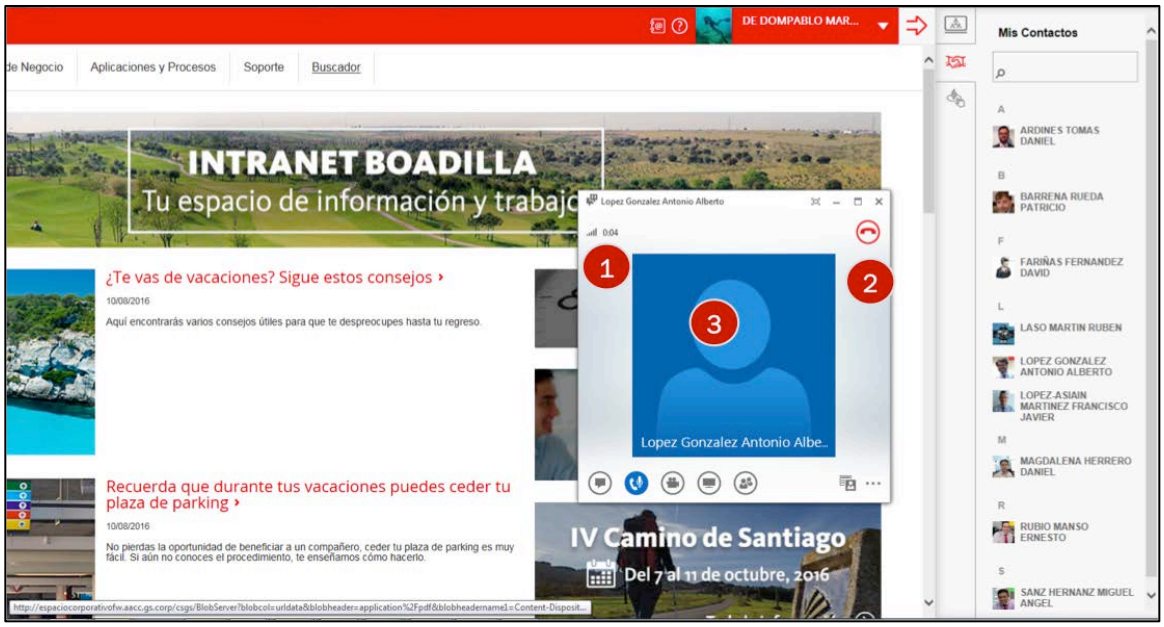


Image 20. Santander Group Intranet Call Window. The call window displays the people on the call, the hang up button, and the date and time. *Santander_09-Communication-call_Live.png*

Communications, Call Highlights

5. **Sound meter:** This shows people that sound is working.
6. **Hang up:** Clicking the red phone icon will end the call.
7. **Icon:** A voice call with no video shows an icon in the center.

Communications, Videoconference

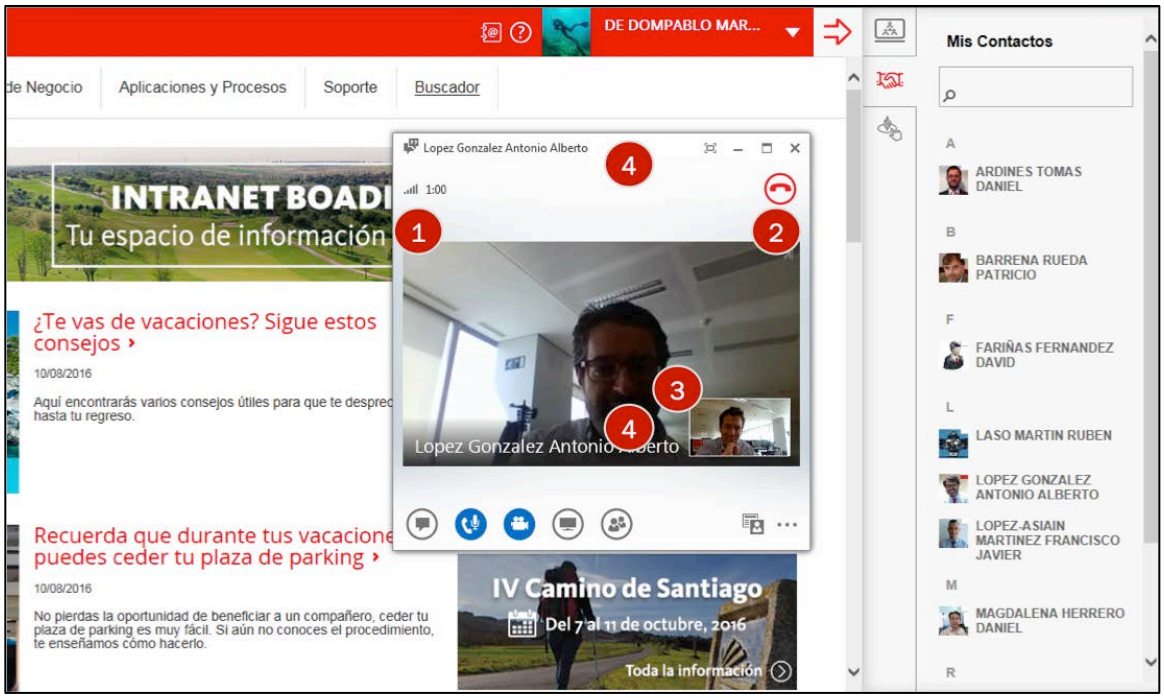


Image 21. Santander Group Intranet Video Call Window. The video call window displays the people on the call, their video, the hang up button, and the date and time. *Santander_10-Communication-Videoconference_Live.png*

Communications, Videoconference Highlights

1. **Sound meter:** This shows people that sound is working.
2. **Hang up:** Clicking the red phone icon will end the call.
3. **Video and inset:** The video of people on the call shows in the center.
4. **Names:** The names of people on the call display on the screen and as the window title.

Communications, Email

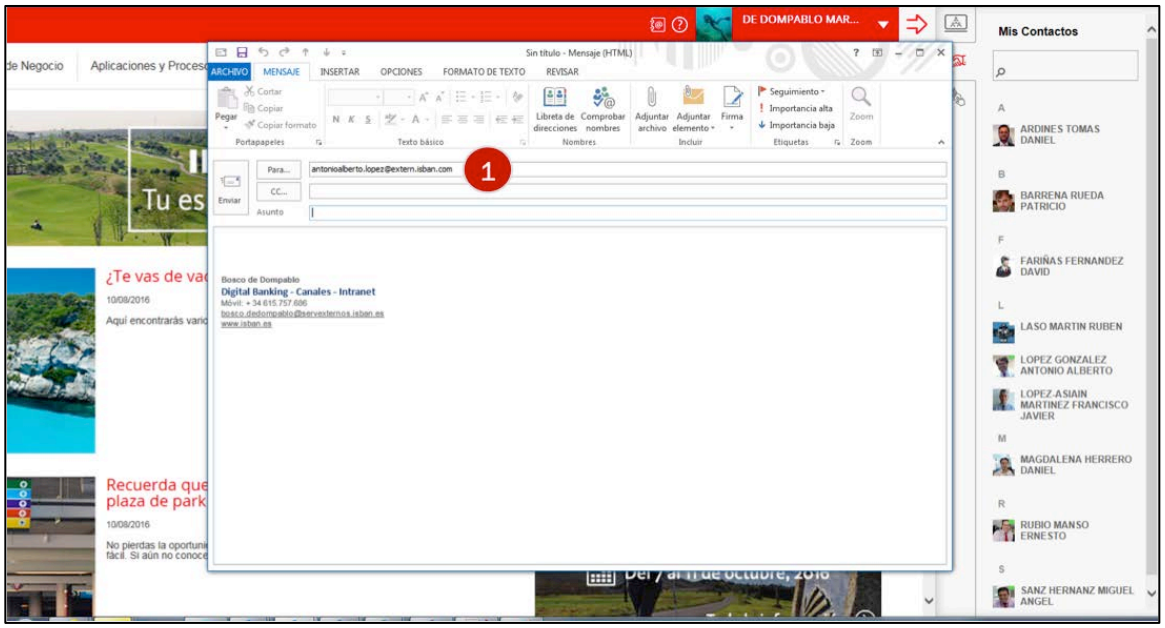


Image 22. Santander Group Intranet Email Message Window. The *to* field is automatically populated when a user clicks on the email icon and launches a message window. *Santander_11-Communication-Email_Live.png*

Communications, Email Highlights

1. **Automatic:** Clicking the email icon launches email; the message is automatically addressed to the contact person.

Personalization

These screens show the different portals and social channels accessible to two different roles. The logged-in user's face displays in the upper right in each.

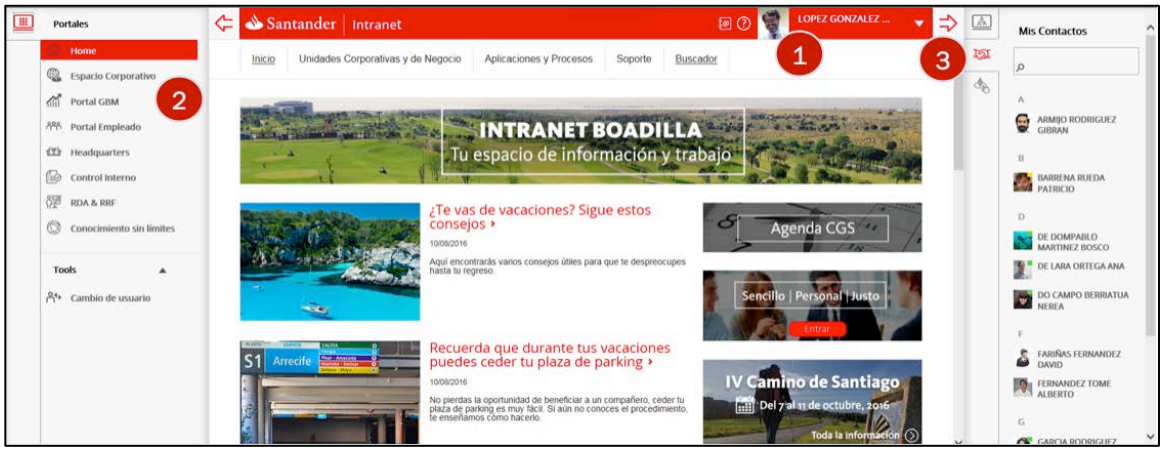


Image 23. Santander Group Intranet Role-Based Personalization. In this view, the user has access to portals and social tabs for **Role1**. *Santander_12-Role-1_Live.png*

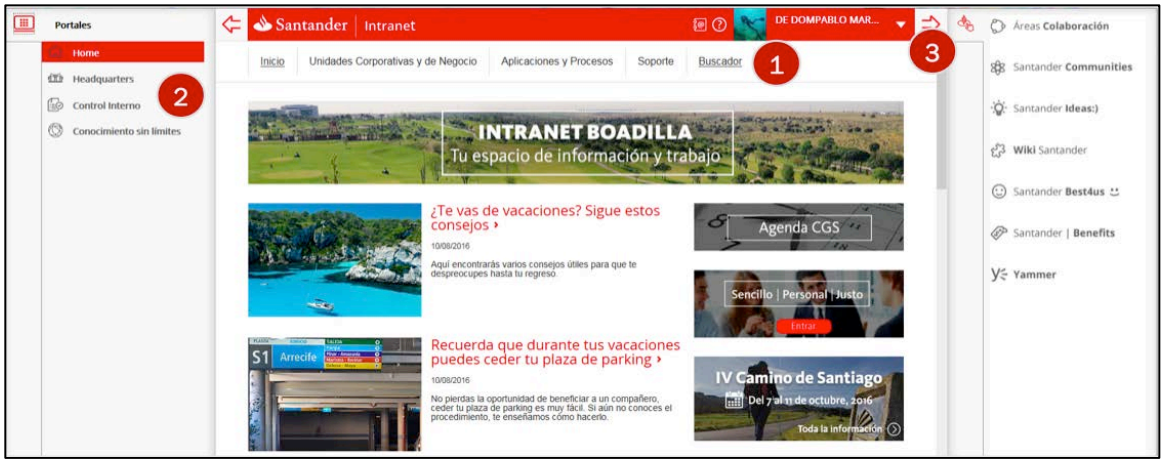


Image 24. Santander Group Intranet Role-Based Personalization. In this view, the user has access to portals and social tabs for **Role2**. *Santander_13-Role-2_Live.png*



Image 25. Santander Group Intranet — Logging Out. The user's picture and menu to the right gives him access to his profile and a link to log out. *Santander_14_Employee-profile-page_Live.png*

Personalization Highlights

Roles are based on various user attributes; the most common ones are related to job and location. The team ensures that careful consideration is given to roles so employees can access the information and applications they need, because security is of highest importance at this and any financial institution. The Corporate Organization Team determines each employee's role, which dictates access to the user's default portal, tools, menus, and information.

1. **Image and login.** An image of the logged-in employee appears at the top of pages, along with a drop-down icon with links to his or her profile and logout.
2. **Varied access to portals.** Role1 (top screen) has access to eight portals (on the left), while Role2 (bottom screen) has access to only four portals.
3. **Varied access to social channels.** Role1 (top screen) has full access to the three social tabs (on the right), while Role2 has access to only one social tab.
4. **Access to profile and logout.** The user's picture and menu to the right gives users access to their profile and a link to log out. Logging out of the intranet is a security feature that is sometimes as important as logging in.

Employee Profile

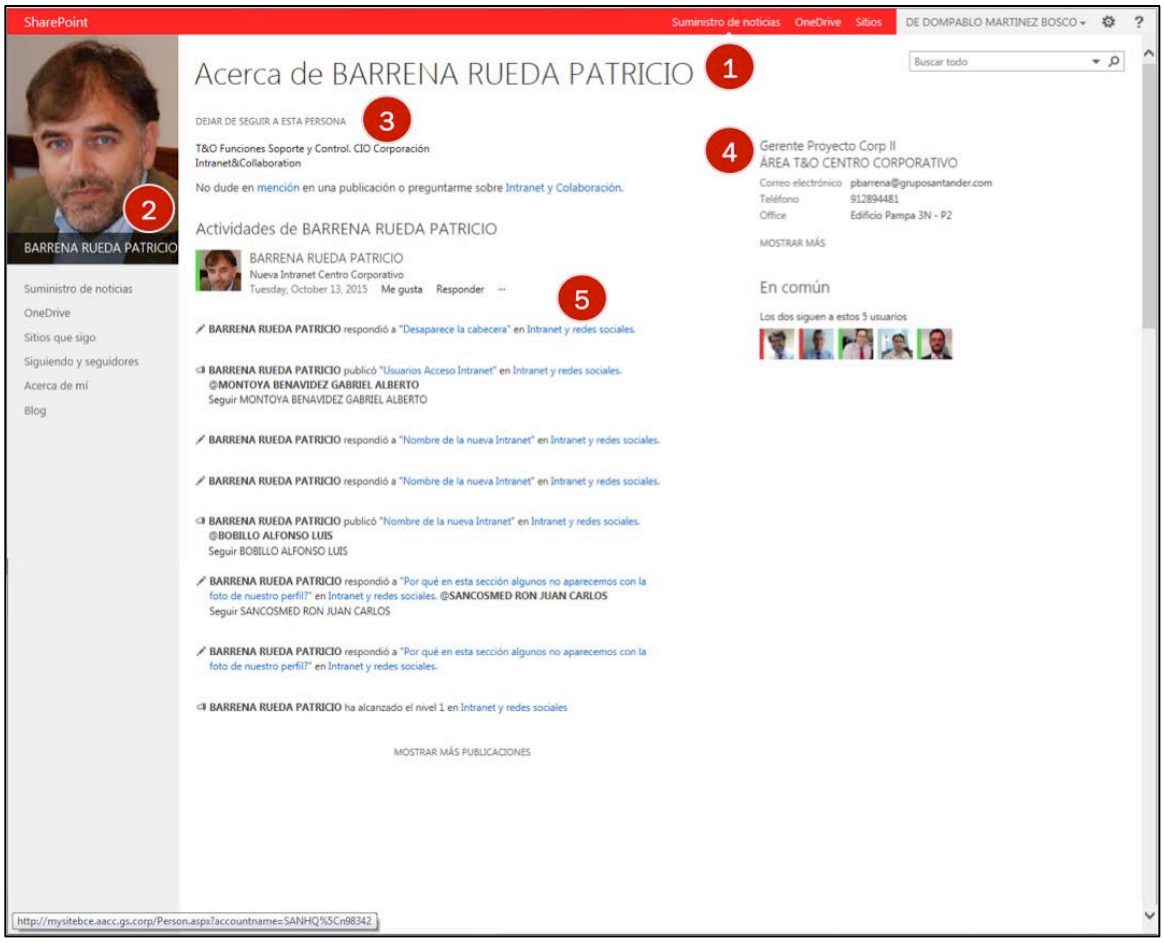


Image 26. Santander Group Intranet Employee Profile Page. The employee profile page includes a photo, job, contact information, and activity stream. *Santander_15_Employee-profile-page-detail_Live.png*

Employee Profile Highlights

1. **Name:** Appears in large letters at the top.
2. **Photo and name**: A clear photo can help employees identify each other, realize which colleagues they haven't yet met, and see what people look like.
3. **Job and area:** Appears below the name.
4. **Contact information:** Phone, email, and office location is visible in the upper right.
5. **Social activity:** Posts and responses make it easy to see what the person is interested in.

Megamenu



Image 27. Santander Group Intranet Megamenu. A simple, uncluttered megamenu. *Santander_16_Top-level-navigation_Live.png*

Megamenu Highlights

1. **Uncluttered menu:** Top-level commands include those for home, corporate and business units, applications and processes, support, and search.
2. **Megamenu background:** The gray background juxtaposed against the page makes the menu easy to see.
3. **Text:** Dark text color provides good contrast against the light gray, making it easy to read.

General Support Services

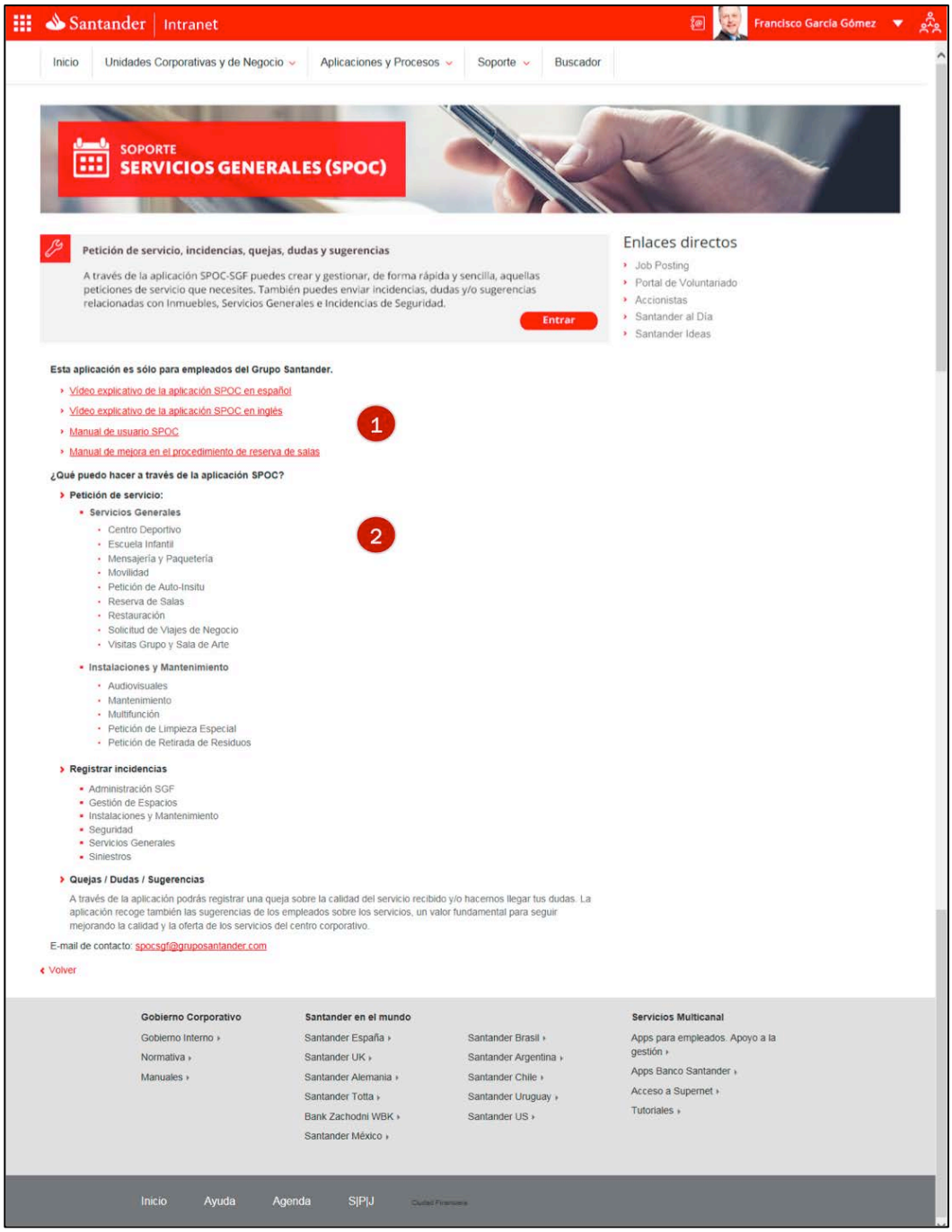


Image 28. Santander Group Intranet Support Page. The support page offers links, videos, and documentation. *Santander_17_Content-level-page-with-interesting-or-helpful-information_Live.png*

General Support Services Highlights

1. **Videos and documentation.** Instructional videos and documentation manuals appear at the top of the page. These features let employees delve deep into a problem and teach themselves how to proceed. It's helpful to let people learn on their own, rather than call support every time they have an issue.
2. **Links to assistance.** Many administrative items, such as moving and IT help, are consolidated on this page. Employees don't need to gather helpful support information from multiple sources, as this page does the work for them.

Corporate Culture Campaign

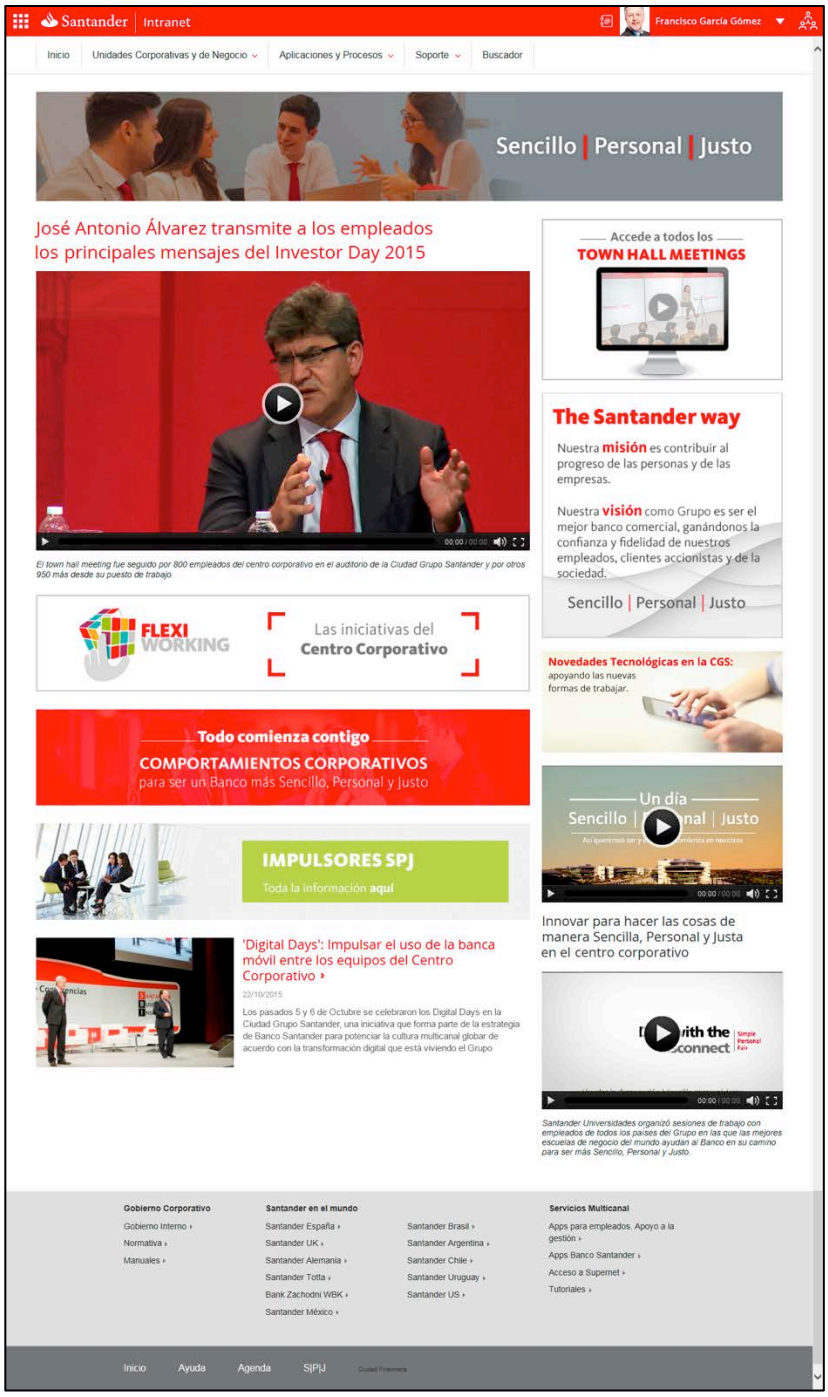
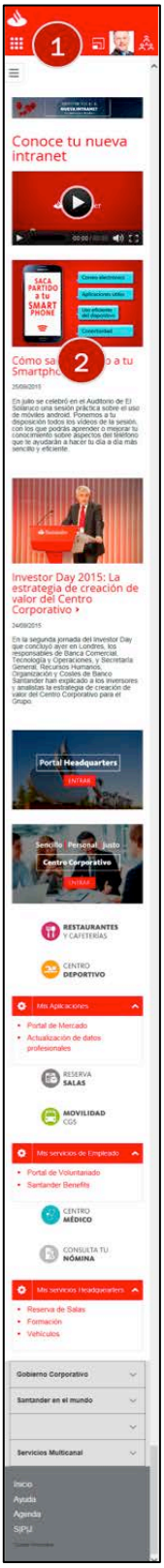


Image 29. Santander Group Intranet Corporate Culture Campaign. The corporate culture campaign unifies the company's many employees. *Santander_18_Page-about-a-particular-team-or-department_Live.png*

Corporate Culture Campaign Highlights

“Simple, Personal, and Fair” is Santander’s corporate culture campaign, and it’s far more than just a slogan. Rather, it represents how the Santander employees think and operate. More importantly, it defines what Santander customers expect of them, and how Santander interacts with customers, shareholders, and society. This type of campaign and supporting site are invaluable to communicate these norms to all employees, and to remind them what the organization as a whole believes is important, and how it wants to be perceived by the public. This corporate culture microsite includes news, videos, initiatives, and lines of action to sustain the campaign.



Responsive Design-Phone

Image 30. Santander Group Intranet Responsive Design — Phone. The intranet is responsive, and it flows to display well on a phone. Santander_19_Mobile-view-of-the-intranet_smartphone_Live.png

Responsive Design-Phone Highlights

1. **Menu collapses:** To accommodate the small mobile screen, the horizontal menu collapses to a hamburger menu.
2. **Content flows:** In this responsive design, the content sections are rearranged to flow well on a small phone screen.



Responsive Design-Tablet

Image 31. Santander Group Intranet Responsive Design — Tablet. The responsive design flows to display well on a tablet. *Santander_20_Mobile-view-of-the-intranet_tablet_Live.png*

Responsive Design-Tablet Highlights

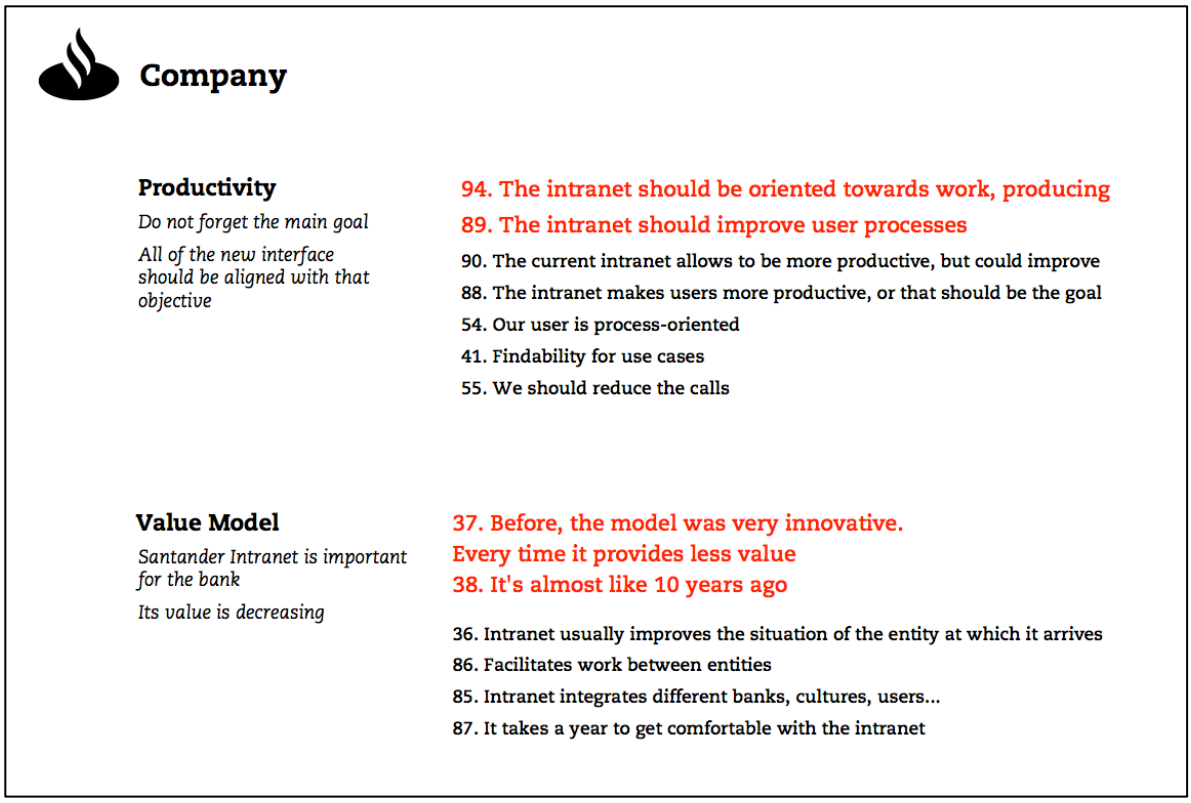
1. **Menu wraps:** To accommodate the tablet screen, the horizontal menu wraps lines.
2. **Content narrows:** In this responsive design, the content sections decrease in width and sometimes move to flow well on the small phone screen.

DESIGN PROCESS AND USABILITY WORK

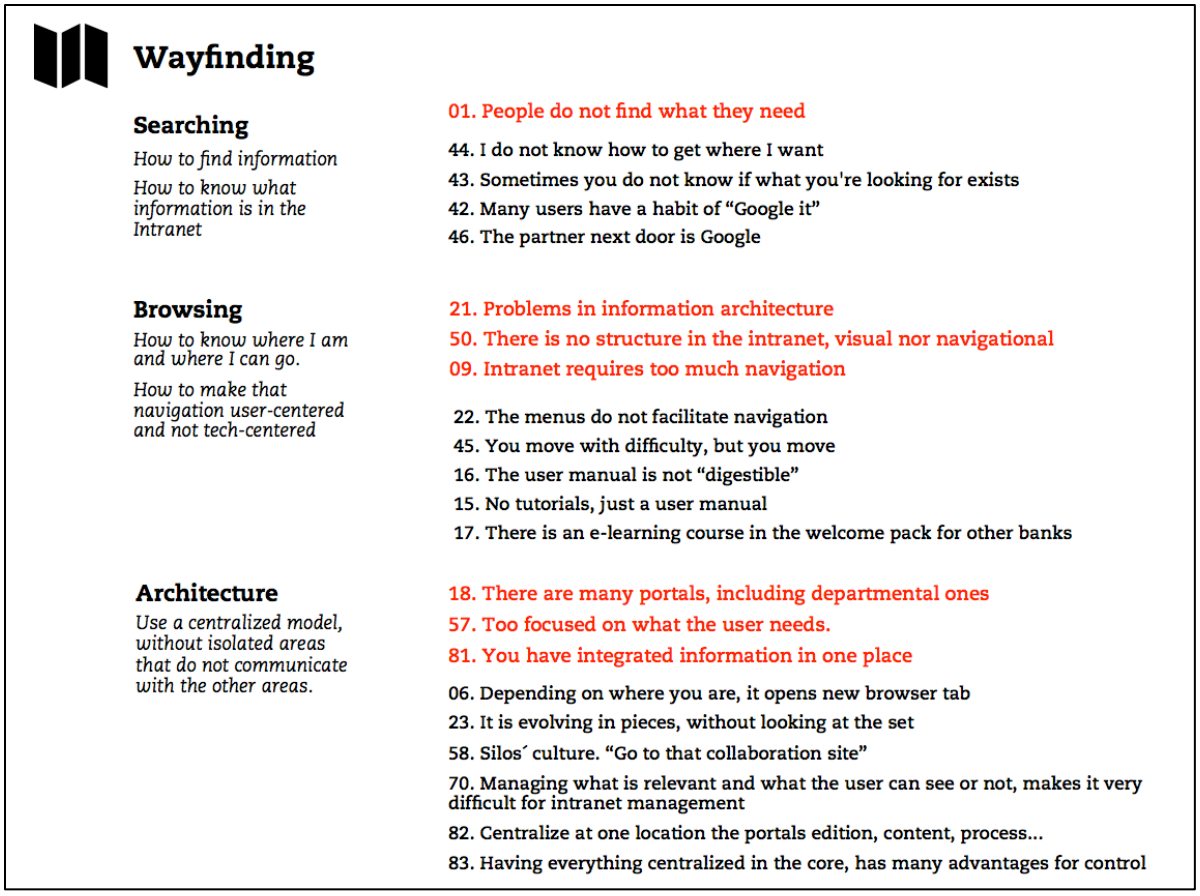
Employees at Santander Group were clamoring for a change, and the technology team felt it needed to surprise them with a new and innovative intranet design. The team also felt that it needed help from experts (other companies, in other sectors) to bring additional perspectives and skills to the project. The internal team therefore partnered with a design agency to help it conduct workshops and mine the organization for storytelling opportunities that would lend themselves to the new intranet tools and features. Given the complexity of Santander Group, having a partner throughout the process helped ensure the project's success.

Following is an overview of the design process activities they used to arrive at the new design:

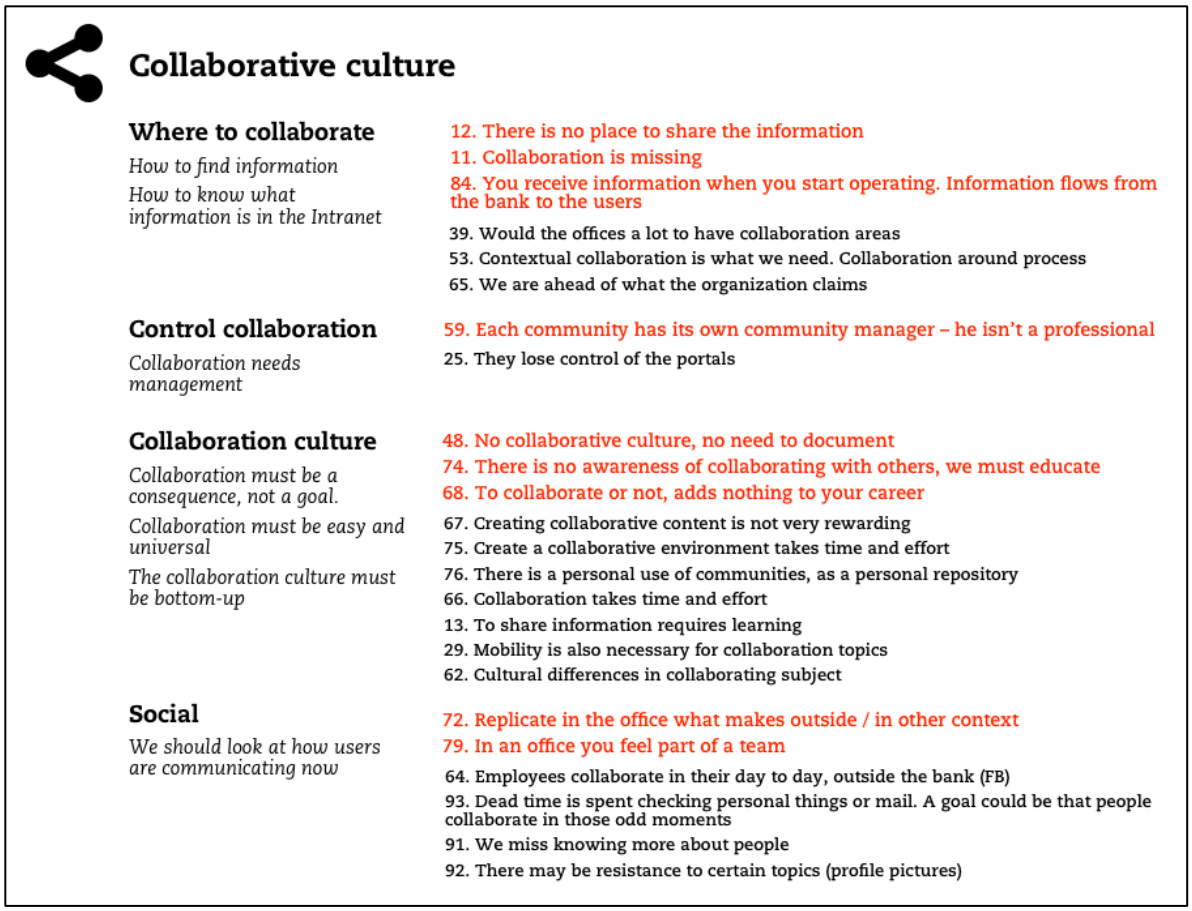
- **Workshops.** Team members conducted workshops with users and arrived at a set of use cases. These use cases helped them get a better picture of how users interacted with the existing intranet and what that would mean for the new model. Through this workshop process, the team arrived at the concept of a model comprised of an intranet and multiple portals.
- **Requirements.** The first task in the workshops was to determine a list of requirements. By the time they were done, the list included nearly 100 requirements.
- **Categorization.** The next step was to categorize the requirements into four overarching areas:
    - **Company:** Facts about strategy and intranet objectives.
    - **Wayfinding:** Facts about content organization, navigation, and the intranet model.
    - **Collaborative culture**: Facts about how to share information and build a real community.
    - **User profiles:** Facts about users, their needs, and their context.



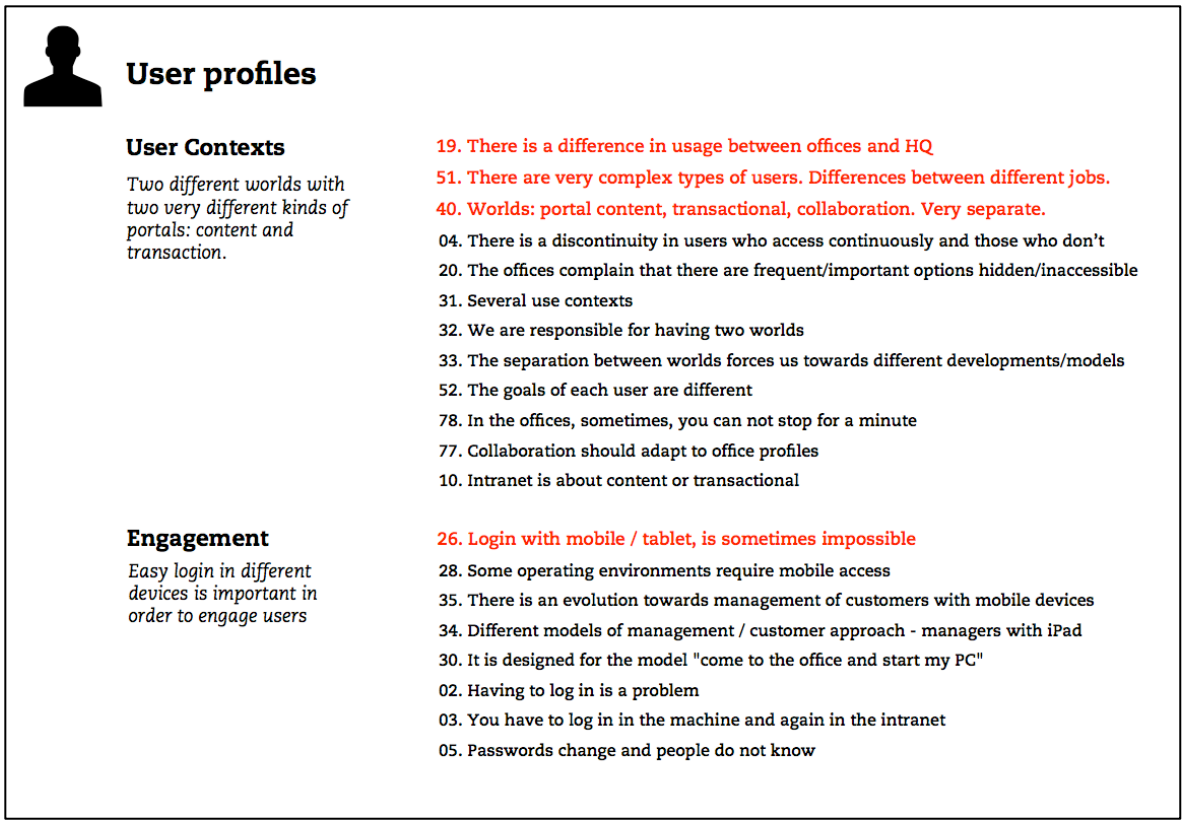
This shows the classification of company requirements the team arrived at through design research activities.



This shows the classification of wayfinding requirements the team arrived at through design research activities.



This shows the classification of collaborative culture requirements the team arrived at through design research activities.



This shows the classification of user profile requirements the team arrived at through design research activities.

- **Use cases.** The project team also worked on use cases during the workshops. These uses cases had to be drawn from the list of requirements generated at the initial sessions. The objective was to illustrate users' needs.
- **Technology definition.** With the initial research in hand, the team worked with software and functional architects to transform the research into technology requirements, exploiting each of the defined use cases through this process.



This diagram shows a project phase in which the team took time to reflect on how the new model would help employees in their daily work. This sketch represents the team's thinking process.

- **Usage data.** The design team analyzed the usage data it had from the existing intranet portals, which included various aspects of use: times of access, most-used applications, and the navigation flow.
- **Prototype.** The team built a navigable responsive design prototype with all the proposed features and demonstrated it to different groups on PCs, iPads, and Android devices. This exercise was a key point for the project's success.

The design research was a success on two fronts. First, the design team established the user as the central focus of its efforts by applying an efficient working methodology and coming together as a multidisciplinary team. In addition, the data gathered through these various exercises helped the team create the basis for the new intranet model, which let users access several portals and applications, with the intranet as the nexus point.

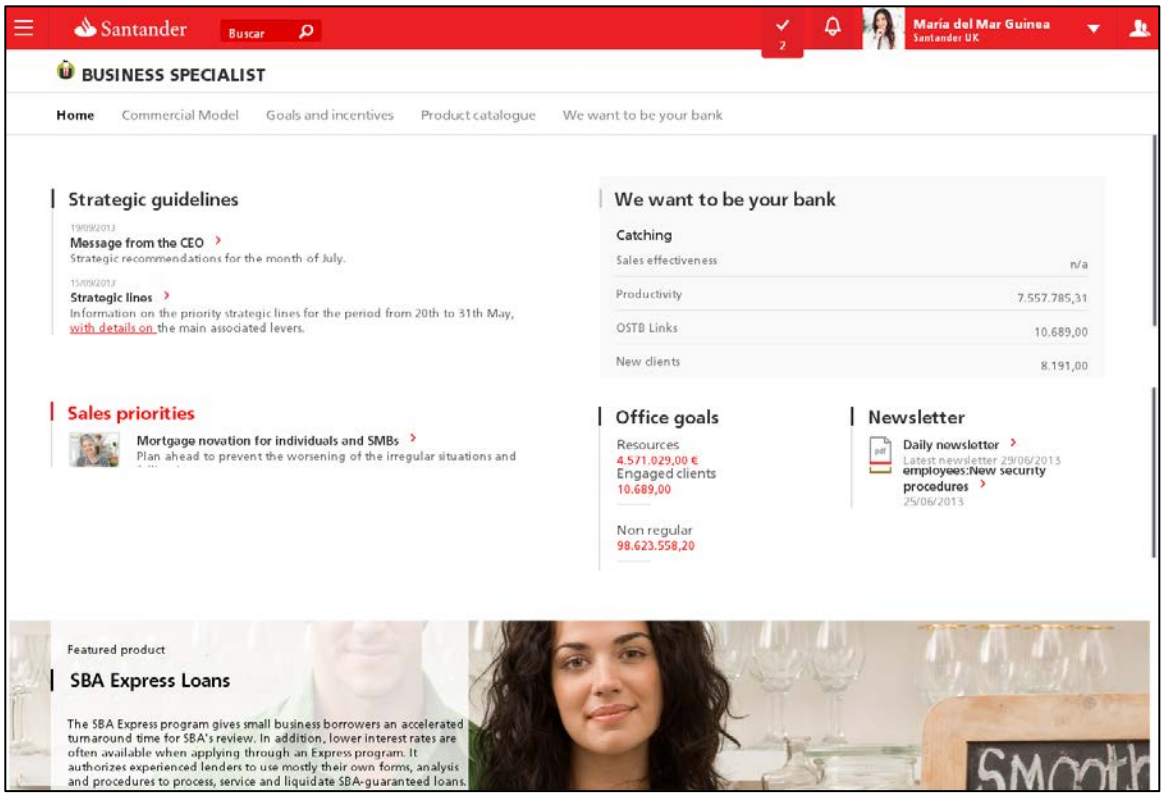


Image 32. Santander Group Intranet Responsive Design Prototype. The design team built a navigable responsive design prototype with all the proposed features, and demonstrated it to different groups on PCs, iPads, and Android devices. This image shows a version of that prototype for the Santander intranet design-in-progress. *Santander_21_Prototype.png*

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Sprint Final UX design and research consultancy	• Supported the final tweaks in the styles and marked the final styles in the portal modules' CSS
DesignIT Global strategic design firm	• Provided support for the conceptual part of the new model and previously and contributed to a previous project's implementation.

GOVERNANCE

The main sponsor of the Santander intranet is the Corporate Communication team, along with Corporate HR team and the Corporate Organization team. These teams manage all types of client- and employee-focused communications for different channels, including the intranet, internet, Twitter, and the press.

Together, these teams defined the new architecture of the company's portals, helped retire old portals and obsolete content, and redefined the intranet UX. This collaborative relationship has provided a positive impact for the intranet as a whole, with the various owners collaborating, bringing in new ideas, and being patient with the inevitable delays in a project of this size and scope.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Corporate Communication Team	Maintains intranet ownership and manages • All content and information that appears on the intranet • The technology evolution of the intranet and portal • Communication
Corporate Human Resources Team	• Provides new employee-related content, documents, and information
Corporate Marketing Team	• Provides design validation
Corporate Technology & Operations Team	• Oversees change management • Coordinates the needs of previous teams • Manages budget for implementation, deployment, and contribution teams
Service Level Team	• Oversees intranet maintenance • Provides incident reports

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	• http://santanderaldia.intranet.gs.corp/ • **Mobile:** http://ssccboa.aacc.gs.corp/Estatico/Comunes/Mobile/html/login.html
Default Status	• Default portal: Home portal
Remote Access	• Remote users can access the intranet through the corporate VPN

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2005	• First company intranet
June 2013	• Launch redesign of intranet model
June–September 2013	• Workshops, storytelling, concepts, and conceptual redesign
October 2013–April 2014	• Work with architectures (software, functional, technical, security) and UX teams to determine which technologies will be used in each functionality
May 2014	• Approbation by management
June 2014	• Budget management and presentation of the project in all areas
June–September 2014	• Requirements with corporate teams
June–October 2014	• Write technical and requirements documentation
October 2014	• Begin the software implementation (frameworks and portal)
February 2015	• Certification by test teams
March–May 2015	• Deployment in intermediate environments, preproduction environment tests, and pro-staging environment
June 2015	• Deployment in pro-delivery environment
July 2015	• Pilot with users
August–September 2015	• Modify styles in CSS after pilot testing
October 2015	• New pilot with changes • Change and communication management
November 2015	• Launch new version of intranet
November 2015–December 2015	• Handover process to maintenance team
November 2015–present	• Review analytics
Overall redesign timeframe: 2 years	

CONTENT AND CONTENT CONTRIBUTORS

Content Workflow

The workflow for content differs based on the three broad content categories:

- **Intranet content.** This content is created by different business areas, such as the Risks, Government, Audit, and Credit departments; the Corporate Communication team also has a committee that decides which content should be posted and where it will be placed on the pages. Once the committee approves the content, the Content Contribution team makes the updates in the content management tools, FatWire, and Liferay. Prior to publishing, members of the Corporate Communication team review the pages and the content.

  The intranet content workflow consists of three user profiles:

  - **Editor:** Edits the content and widgets.
  - **Expert reviewer:** Reviews the content, the structure and format of the widgets, and the page distribution.
  - **Publisher:** Publishes content, widgets, and portal pages.
- **Portal content.** The Content Contribution team manages portal content. It is responsible for most of the corporate content in the portals and for content contribution across most Santander Group entities.
- **Collaborative content.** All employees can use the collaboration tool and participate in collaboration spaces by generating ideas, posting documents, and so on. There aren't any committees or workflow for this type of content — it is open to all employees.



Image 33. Santander Group Intranet Portal Manager Tool. The portal manager lets people easily move portlets from one location to another. Here, for example, the person is moving portlets from column 12 to column 8. *Santander_22-Content-management_1_Live.png*

TECHNOLOGY

Choosing a Platform

An intranet is a combination of many critical pieces — intranet structure, portals, metrics, single sign-on, and so on. To choose the technologies Santander would use to support these pieces, the team conducted a detailed study, examining user requirements, the company's technology environment, available platforms, time, cost, licenses, and the critical issue of making all this technology work together. The goal was to find a solution that delivered on the following key points:

- **Design:** Align with the latest design trends and be based on responsive design to accommodate the next wave of mobile devices.
- **Collaboration:** Provide space for collaboration and sharing among employees and enable communication among all parties.
- **Participation:** Allow people to evaluate content, fostering communication among employees and allowing the team to better understand employee preferences and needs so it can adapt content accordingly.
- **Easy access:** Enable use of single sign-on via user workstations, facilitating access to the intranet and other portals, applications, and so on, while avoiding the use of multiple passwords.

- **Personalization:** Provide personalized content according to user profile and information selected directly by the employee.
- **Mobility:** Make the intranet available for all types of devices on different operating systems and a range of browsers.
- **Analytics:** Offer a platform that provides information based on how and when employees use the intranet, portals, applications, and so on.

This evaluation process led to the following technology choices:

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Windows 2008/Linux Red Hat v6.2
Bug Tracking / Quality Assurance	• HP ALM — Mercury Quality Center/Sonar
Design Tools	• Photoshop 2015, Sketch
Site Building Tools	• Liferay v6.2
Content Management Tools	• FatWire (Oracle Web center)
Search	• IDOL 7.5
Other Functions	• Microsoft ADSF + SharePoint 2013

ROI

Monitoring Use and Making Adjustments

One of the requirements for the new intranet was that it provide Santander Group with information about usage habits. With this in mind, the team developed the new intranet software with Google Analytics tags. All navigation on the intranet and the portal is registered in the Google Analytics account, giving the team access to reports on: length of visits, the content people are interested in, routes of entry and exit, locations where people are visiting from, and so on.

To extract the most effective data from the Google Analytics tool, the Communication and Technology and Operations teams were trained in its use. The tool allows the organization to effectively monitor which intranet features users are interested in and act on that interest.

The new intranet's quality has encouraged people to use it daily; this increased use is helping the team analyze how to make the intranet even better. "Together with Google Analytics, we know the 'taste' of the user," says González.

The Corporate Communication team modifies page structure, intranet content, publishing times, and other aspects of the new intranet to jibe with how people are actually using the site. Google Analytics has proven a powerful ally in helping the team evolve the intranet in line with the interests and habits of its users.

The team also monitors users satisfaction through engagement surveys; the new intranet scored very high on the most recent survey.



Image 34. Santander Group Intranet Google Analytics Report. This and the screen below show the types of data available through the Google Analytics tool that the team uses to track site usage and make adjustments in response. The Santander team created two Google Analytics roles: one to track intranet metrics and another to track portal metrics. This screen shows the intranet data. *Santander_23_Analytics_Intranet.png*

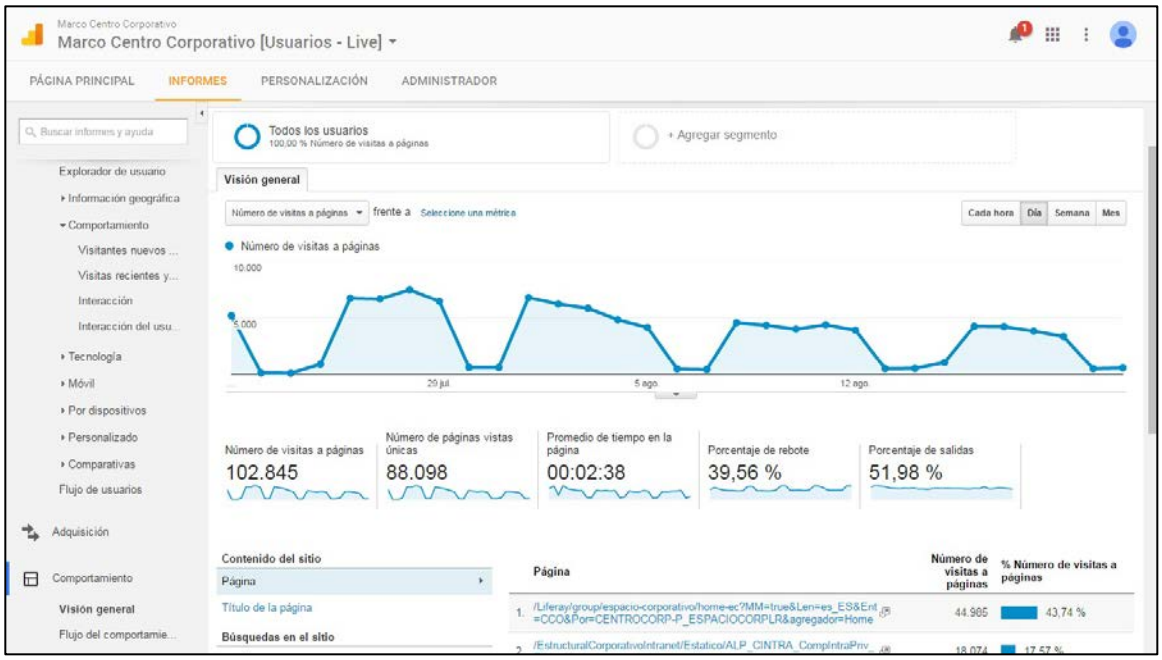


Image 35. Santander Group Intranet Google Analytics Report. This and the screen above show the types of data available through the Google Analytics tool that the team uses to track site usage and make adjustments in response. The Santander team created two Google Analytics roles: one to track intranet metrics and another to track portal metrics. This screen shows the portal data. *Santander_24_Analytics_Portal.png*

LESSONS LEARNED AND BEST PRACTICES

When taking on a big project involving so many different systems, a team must be ready to roll with the punches, knowing that it might make some mistakes but that, in doing so, it will also learn best practices that will inform future decisions.

The Santander team was ready to handle whatever came its way, and in doing so it learned a few things. Portals Project Manager Bosco de Dompablo summarizes those lessons:

- **Don't take things for granted.** "We forgot to consider a secondary cookie the old intranet needed to access some legacy applications. We didn't include this cookie in the new intranet, assuming users wouldn't need to access the old applications, and we were wrong! They did need it. That little mistake made us involve the software architecture and development teams again, late in the project, and of course we had to redo our planning. So I wouldn't take things for granted again."
- **A unified team creates institutional knowledge.** "This project involved more than 100 people, different business areas, and different companies. What we tried to do is encourage them to work toward a common goal, a joint success, and it worked. The whole team worked hard and we built a community of knowledge and fellowship that will be available for upcoming projects."

- **Communication is key.** “Fluent communication with stakeholders can save the project, avoiding deviations between the client’s idea and the final product.”
- **Transparency is an effective tool.** “We lived by the motto that any problem shall be transparent to the team. We had to be willing to say: ‘Team, we have a problem here. What do we do? Who do we involve? There’s a meeting in two hours, with software architecture, technical architecture, the security team, and system managers so we can solve the problem and not hide behind the fact that there was a problem to be solved.’”
- **Believe in and encourage the team.** “Every congratulations email or prize won should be communicated to each member of the team, and they all should be congratulated for it.”

Travelers Insurance

OVERVIEW

COMPANY

The Travelers Companies, Inc., is a leading provider of property casualty insurance for auto, home, and business. A component of the Dow Jones Industrial Average, Travelers has approximately 30,000 employees and generated revenues of approximately $28 billion in 2016.

Headquarters: New York, New York

Company locations: In addition to its main offices (in New York; Hartford, Connecticut; and St. Paul, Minnesota) Travelers has three customer service centers and 121 field offices. These operations are located primarily in the US and Canada, but also across the UK, Ireland, and Brazil.

Locations where people use the intranet: The intranet serves more than 30,000 employees in offices throughout the US, Canada, the UK, Ireland, and Brazil.

Annual revenue: Travelers generated revenues of approximately $28 billion in 2016.

THE INTRANET

Users: Travelers has a highly connected workforce. Virtually all employees — from desk-based employees to customer service representatives to mobile workers such as claim professionals — use a company-provided desktop, laptop, or mobile device as part of their daily routine.

Mobile approach: Responsive web design

Technology platform: DCM Opentext CMS and .NET application

TEAM

Executive Sponsors: Lisa Caputo, EVP, Marketing, Communications and Customer Experience; Madelyn Lankton, EVP and Chief Information Officer, Enterprise Operations and eBusiness

Leadership: Patrick Linehan, VP, Corporate Communications; Jason Galvin, VP, eBusiness

Redesign Lead: Jenn Renwick, Employee Communications; Jay Chin, eBusiness

Redesign Team: Ken Luurtsema, Scrum Master/TDL; Brian Bellino, UI; Amarjeet Kaur, .NET Developer; James Hartman, UX; Tom Nunes, UI; Michael Gammon, Search and CMS; Rebecca Finley, CMS; Jason Natelle, Project Support

Redesign Support: Gagen MacDonald; Accenture; Fjord

CONTENT TEAM

Enterprise Internal Communications: Andrew Turner and Annette Gunn

INTRANET TEAM



Team members shown here (top row, left to right): Patrick Linehan, Jason Galvin, Jenn Renwick, Jay Chin, and Ken Luurtsema; (2nd row, left to right): Tom Nunes, Rebecca Finley, Michael Gammon, Brian Bellino, and Amarjeet Kaur; (3rd row, left to right): Annette Gunn, Jason Natelle, Andrew Turner, James Hartman, and Amy Dietz; (4th row, left to right): Manishkumar Nire, Chandra Sekhar Reddy Sirigi, Ashoka Mahadevaiah, and Manavarthi Poorna Sasikanth.

HIGHLIGHTS ABOUT THIS WINNER

An intranet doesn't have to be overly fancy to be amazing. Sometimes the steady, discerning designs are the best fit and the most helpful for the organization. The Travelers intranet, named *inside*, gets the job done exquisitely, without a lot of fanfare.

- **Personalization and customization.** Rather than barraging employees with vast, unorganized content, the Travelers intranet feeds only the most relevant information to individuals based on business and location. Also, users can customize various content areas to meet their wishes. The homepage, news, and global navigation are some of the areas the intranet personalizes to the employee and it also allows him or her to customize further.
- **Tools.** *inside* brings users' tools and bookmarks to the foreground, so everything they need is at the top of the homepage or just a click away in the *My Links* menu.
- **News.** Many rich news articles enhance employees' knowledge about day-to-day and important corporate developments at the company. Keeping all employees apprised this way is important for engagement and alignment.
- **Mobile.** Travelers employees access the intranet on their company-managed mobile devices. The large population of mobile workers, such as claim professionals, especially appreciate the mobile capabilities. The site was built with a responsive design, and nearly all the features available on desktop are also available on mobile.
- **Searchable, editable employee profiles.** Finding the right person to collaborate with is half the battle at many organizations, but at Travelers, employees can add expertise and topics of interest to their employee profiles. Because this information is included in the intranet search, employees can find colleagues by searching for skills and interests in addition to contact information. Experts and people interested in the queried topic appear in results.
- **Department sections.** Finding the right individual for the job is critical. Likewise, knowing which department specializes in something you need assistance with — and how to make contact — is also imperative. Department sections, owned by the respective departments, include information that educates employees about the many kinds of work done at Travelers, and which teams can assist them in doing their work. This department information helps people collaborate effectively using the resources Travelers has to offer.

BACKGROUND

For more than a decade, the Travelers intranet, *inside*, was corporate-centric and failed to meet employees' varied needs. Poorly organized content and ineffective search made finding information inefficient and frustrating. To edit pages, content owners had to submit IT requests that could take up to six months to process. Site metrics were inconsistent and unreliable. But *inside*'s largest drawback was that it was one-size-fits-all — a single, enterprise-driven experience for a diverse

workforce. As one Travelers employee put it, “There’s so much information that’s not specific to you, it’s hard to wade through it and find what you need to know.”

The Enterprise Internal Communications team set out to create a user-centric intranet that more effectively helped employees find information relevant to their work, accomplish daily tasks, and achieve business goals. Very simply, it needed to change *inside* from an information repository to an intranet that enabled more effective and efficient access to and sharing of information. To do that, it focused on and delivered six key capabilities:

- **Mobile:** offer access on mobile devices, using responsive web design for easy access and viewing.
- **Search:** improve search functionality so employees can find information, people, tools, and expertise easily and intuitively.
- **Personalization:** create a personalized entry-point to the intranet based on business unit, role, location, and so on.
- **Customization:** offer customization, so that employees can choose the content most valuable to them.
- **Navigation:** provide more intuitive and concise navigation and organization.
- **Metrics:** gather accurate metrics to track views, search results, habits, and more.

After an 18-month journey to secure buy-in and budget, two agile development teams constructed the new *inside* in 10 months.

The improved intranet is currently available to US-based employees. International, multilingual versions of the site rolled out for Canadian employees in October 2017 and will be available for European employees in 2018.



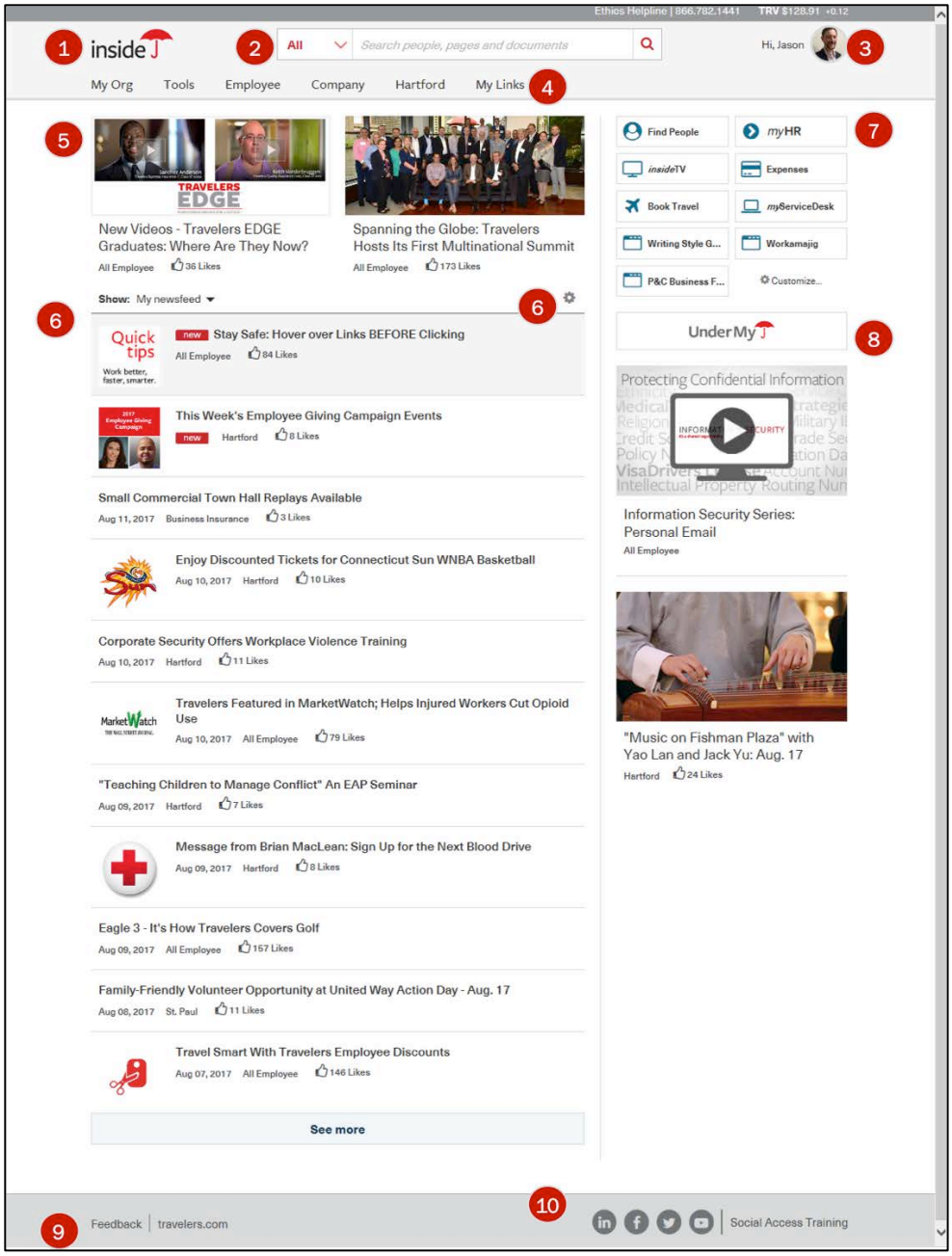
Pictured: Travelers Insurance Intranet Legacy Homepage. This is the *inside* intranet's legacy homepage and what all US employees saw prior to the new US site launch in February 2017.
121_Travelers_01_HomePage_Version1.png



Pictured: Travelers Insurance Intranet Legacy Content Page. The legacy intranet did not lend itself well to customizable news pages. Content owners were limited by the template and often unable to format pages to meet their needs. *122_Travelers_02_ContentPage_Version1.png*

DESIGN REVIEW

Homepage



Pictured: Travelers Insurance Intranet Homepage. The news, links, and menu are personalized to the logged-in employee on the Travelers intranet. 123_*Travelers_03_HomePage_Live.png*

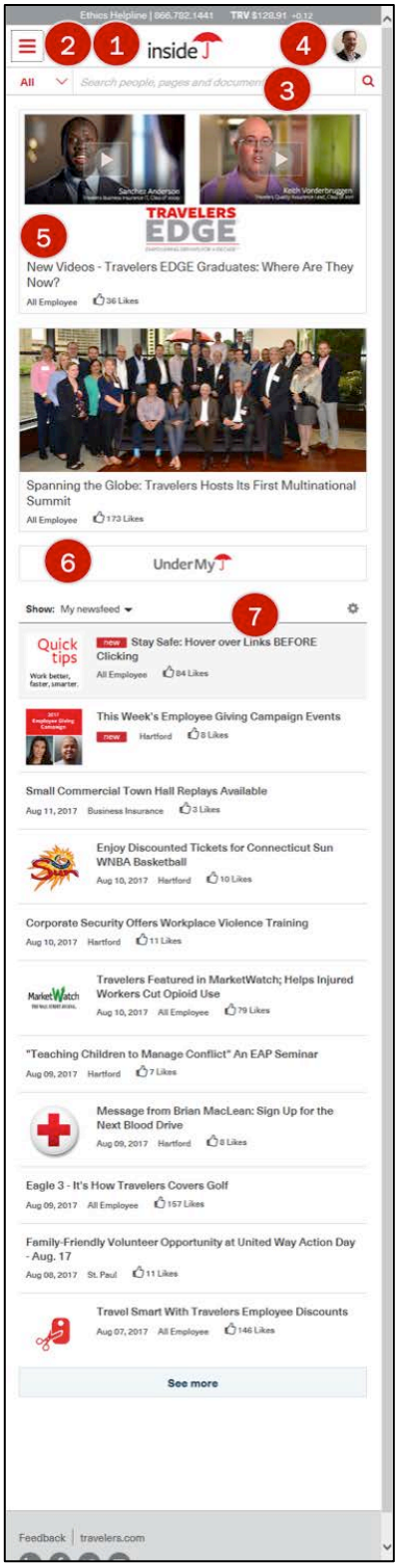
Homepage Highlights

The intranet's previous version was cluttered and information was hard to find; the homepage was one culprit. The new *inside* homepage design is clean and offers invaluable nuggets of information in neat compartments that are easy to scan.

1. **Logo.** The logo in the upper left of the homepage and all pages on the intranet confirm the intranet's name and is accompanied by the familiar red umbrella from the Travelers logo — and, with a click, it allows employees to go home.
2. **Search.** The search field in the center of the header is available on all pages of *inside*. Users can search different areas by choosing them in the drop-down list. Zeroing in on the places that search crawls not only makes search run faster, it makes results easier to deal with. The default choice for searching is *All,* which is best as some users are unsure about where to search and others may not notice the drop-down list. Users can filter results by type (pages, news, PDF, Excel, Word, and PowerPoint) and date (past 7 days, past 30 days, and past 6 months). The results that include people can be filtered by location, division, and department.
3. **Login.** A photo of the logged-in user appears in the upper right, along with "Hi [*name*]," to welcome the employee.
4. **Global navigation.** A subtle gray background and a thin, darker gray horizontal line separates the header, which includes the global navigation links, from the rest of the page. This is a nice effect that makes the header and navigation look important, but still easily falls into the background when the user begins scanning the page content. The user's location — here, *Hartford* — appears as the second-to-last link. This location-based navigation helps users find information related to their own, rather than all, locations. The *My Links* menu leads to the list of links related to the logged in user. Offering this personalized menu and the ability for users to further customize and add their own links is a great way to catapult employees to higher productivity levels.
5. **Featured news.** The featured news, including videos and other content, are awarded the top space in the homepage content area. The space on the left is designated for all-employee news, while the space on the right has news related to the employee's designated business unit. If the business unit does not have news content, an all-employee story populates. This gives business unit content owners flexibility as to when they publish content and ensures only the most pressing stories are featured at the top of the page. These news items include a headline, a related image, the number of likes, and the intended audience.
6. **Personalized and customized news.** Below the featured news are news stories and promotional content based on the user's role and location. Users can also choose to subscribe to up to 15 news sources using the gear icon in the upper right of the newsfeed area. These subscriptions help people stay up-to-date on information they need and want, and they can be customized immediately. Articles in the

newsfeed also include a headline, an image (sometimes), the number of likes, and the intended audience. Each item is dated in an international format, spelling out the month and using all four digits for the year. A red "new" icon appears by recently published stories, flagging the freshest content. The *See more* bar at the bottom of the section leads to more news stories compiled by search in chronological order with brief synopses.

7. **Quick links.** At the top of the homepage's right rail is a section with links to tools, which keeps the user's most frequently used tools and applications handy.
8. ***UnderMyUmbrella*.** The *UnderMyUmbrella* button leads to an employee-only app that hosts the CEO's blog**.**
9. **Feedback.** Because it is always interested in employee feedback, the intranet team included a *Feedback* link at the bottom of every page.
10. **Social.** Icons for the Travelers' social channels appear in the bottom right of the page. All employees can access these channels after taking social media access training. A handy link, *Social Access Training,* helps interested users get there.



Home, Mobile

Pictured: Travelers Insurance Intranet. When accessed on a mobile phone, the site flows and section sizes adjust to create a pleasant experience.
124_Travelers_04_MobileHomePage_Live.png

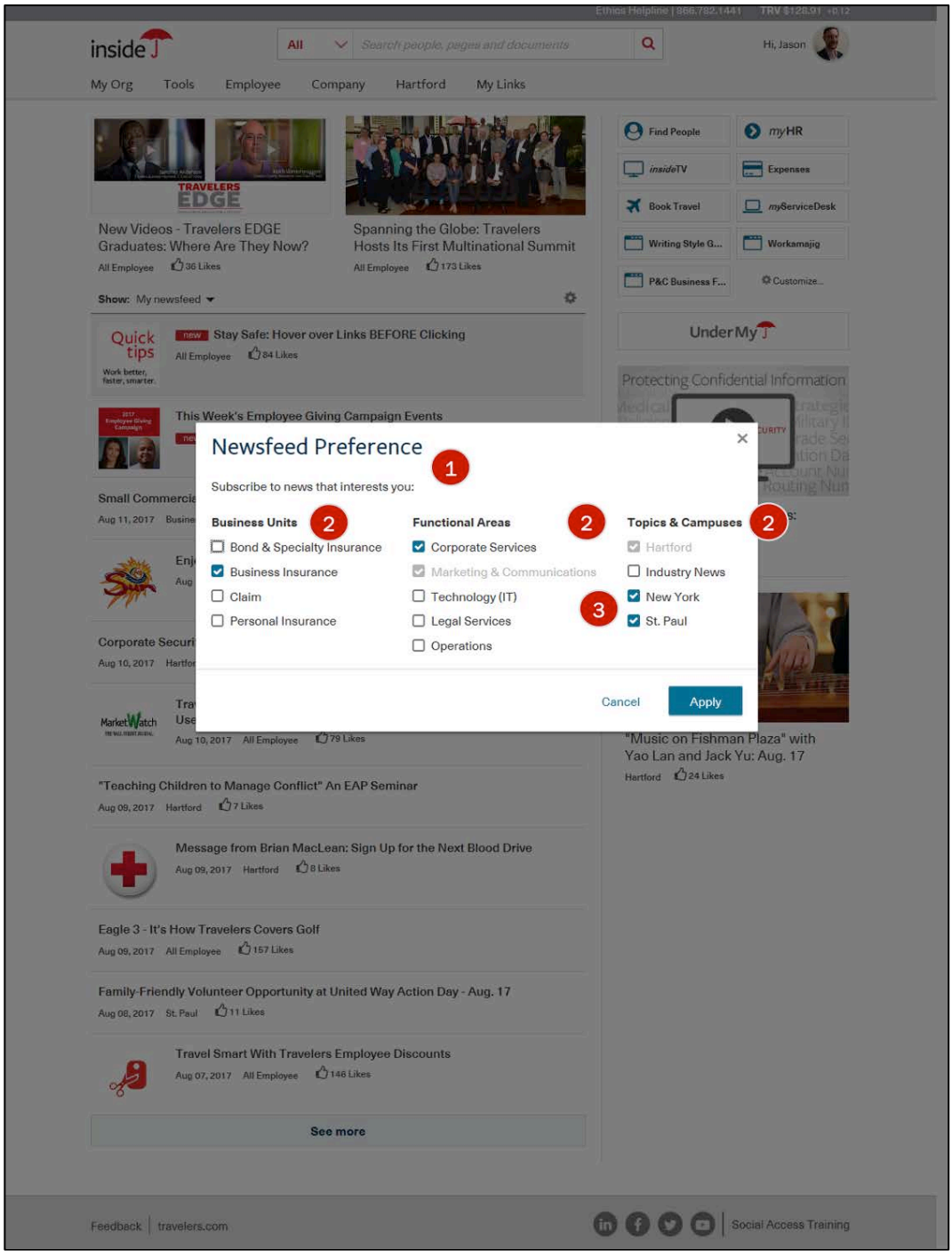
Home, Mobile Highlights

Mobile access is important for many Travelers employees. But for a select set of employees, such as claim professionals, who work primarily on the road, the responsive mobile site was an especially big prize. All users can access the intranet using their company-managed mobile device. *inside*'s homepage is the default page when users open the AirWatch browser.

The responsive design reprioritizes content and adjusts the layout so that it flows well on mobile. In a few cases, content that appears on desktop doesn't appear on mobile. For example, the desktop homepage's frequently used tools section links mostly to third-party applications that are not mobile enabled, so it doesn't appear when accessing *inside* on a mobile phone.

1. **Logo.** As on the desktop, on mobile, the *inside* logo confirms the site that users are on. In the mobile layout, however, the logo is centered to make room for the menu icon.
2. **Global navigation icon.** The global navigation menu is collapsed in a hamburger icon in the upper left to save screen real estate for content.
3. **Search.** The wide search field and accompanying scoping drop-down list are dealt a prominent space on mobile.
4. **User image.** To confirm that users are logged in, a small image of the user appears in the upper right.
5. **Focal videos and news.** The same featured news items, including videos, cover most of the homepage above the fold.
6. ***UnderMyUmbrella*.** The *UnderMyUmbrella* button leads to an employee-only app that hosts the CEO's blog**.**
7. **Newsfeed.** As on desktop, news is personalized to and customized by the user. It appears in a single column, making it easy for users to swipe and sample the list of items.

News Customization



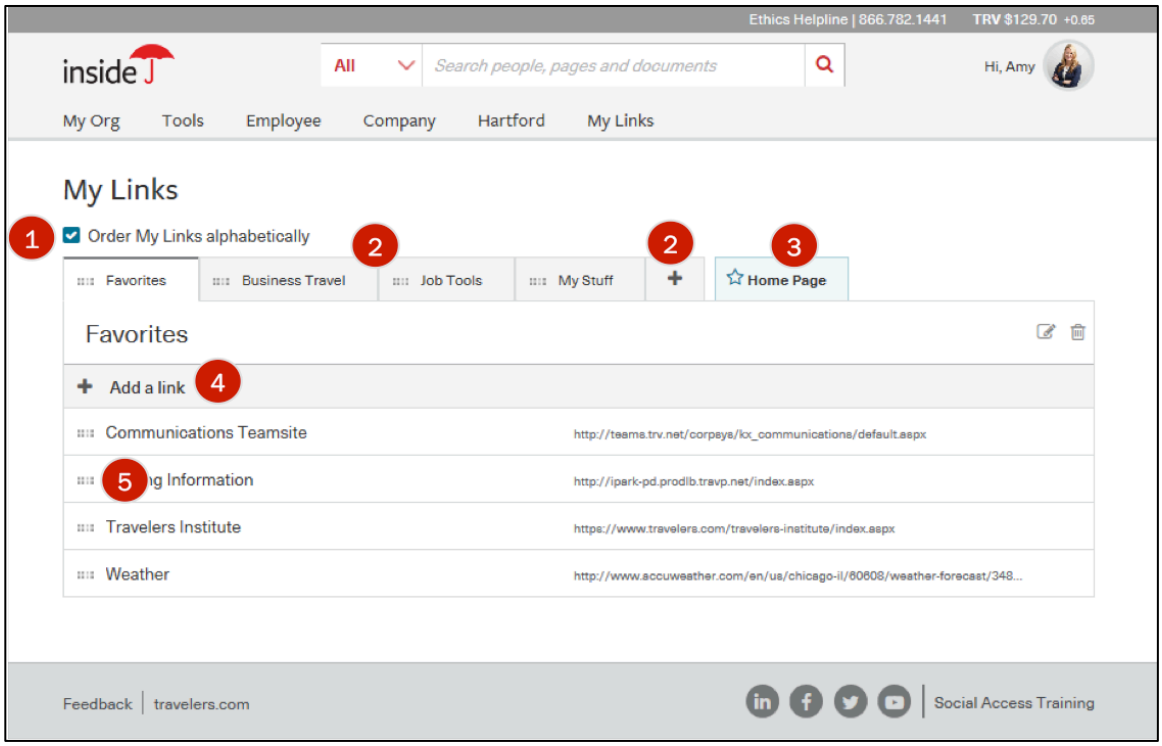
Pictured: Travelers Insurance Intranet News Customization. Employees can subscribe to and unsubscribe from news topics as easily as clicking checkboxes. *125_Travelers_05_NewsfeedCustomization_Live.png*

News Customization Highlights

Clicking on the gear icon just above the newsfeed lets employees easily access settings for customizing their news.

1. **Title and instruction.** The title of the modal dialog communicates that users can change their news preferences here. The note below the title — *Subscribe to news that interests you* — suggests to users what they should do.
2. **Headings and columns.** When presenting several items to choose from, the chunking principle is always a great way to help users assess their options. The column headings help users evaluate the lists of items.
3. **Checkboxes.** Changing the color of selected checkboxes to the branded blue is a nice added touch. The standard checkmark icon is also present.
4. **Gray items.** Grayed-out news items indicate topics that the user has been automatically subscribed to based on his/her role. This is a good way to prevent people from accidentally unsubscribing from information feeds they need.

Editing My Links



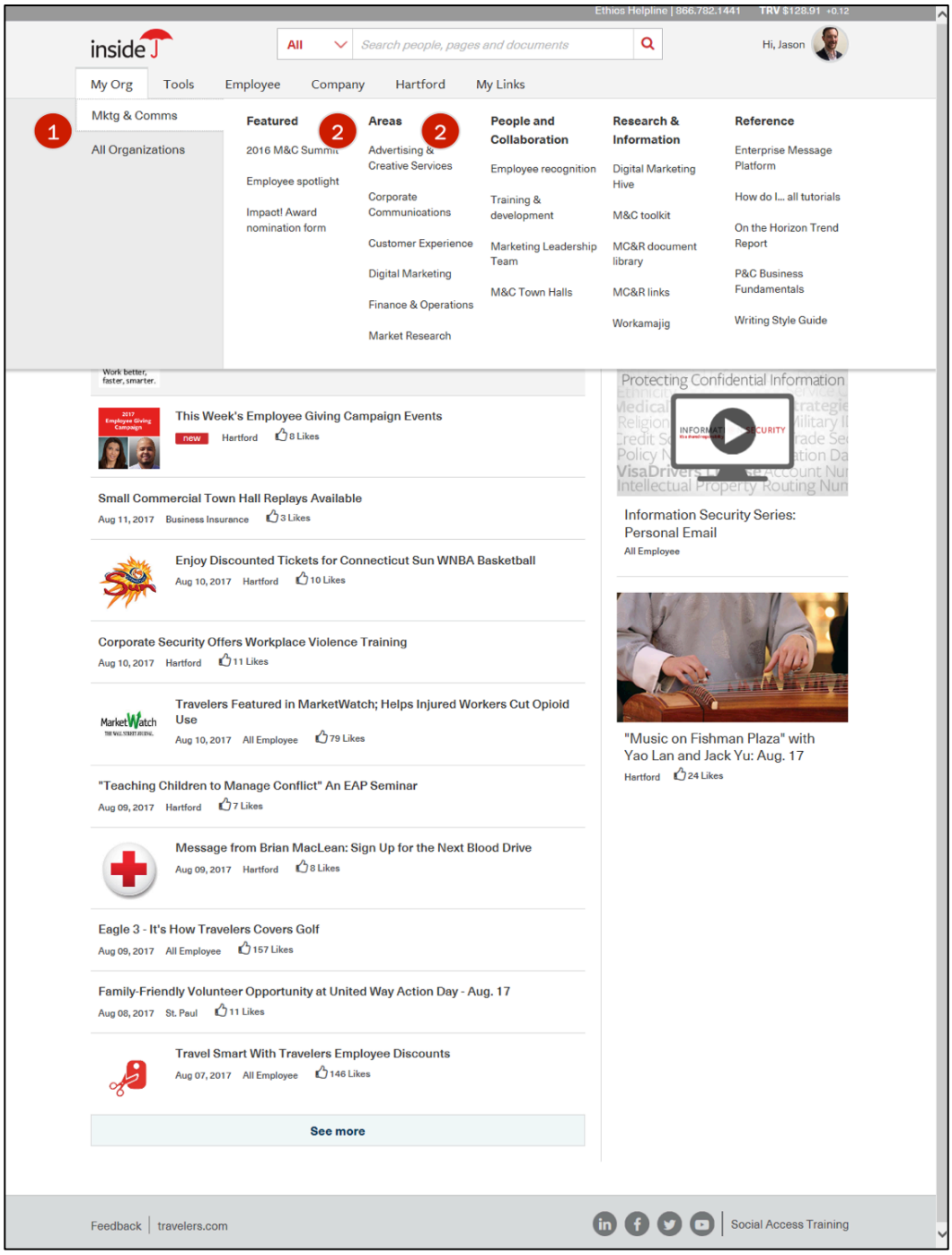
Pictured: Travelers Insurance Intranet Editing My Links. Employees can add and organize their links on the intranet, making it fast and easy to find the pages and apps they need. *126_Travelers_06_MyLinks_Live.png*

Editing My Links Highlights

With *My Links*, the user's bookmarks are available from any intranet page. Employees can edit the links that will appear and the subcategories in which they will appear in the global navigation's *My Links* menu. In the new design, editing links is a straightforward process, and the new intranet offers more robust categorization capabilities than the previous design.

1. **Order.** The *Order my links alphabetically* checkbox is a nice feature that helps keep links organized and easy to find. When selected, the links are automatically sorted by name from a to z.
2. **Categories.** Instead of simply allowing users to create links in the global navigation, designers took things to another level by letting users create categories for their links. The first five tabs are categories users can create in global navigation under the *My Links* menu. To create a new category — and up to five total — users simply click the plus-sign icon.
3. **Homepage links.** In this same interface, via the last tab, labeled *Home Page,* users can add, edit, and remove up to five links that appear in the upper right of the homepage. This gives users quick access to the apps and pages they need for their work.
4. **Add.** Employees add links by clicking the plus-sign icon labeled *Add a link.*
5. **Drag-and-drop.** Users can easily move a bookmark to a new rank within the list or to a new category, including the homepage, using a drag-and-drop feature.

Megamenu



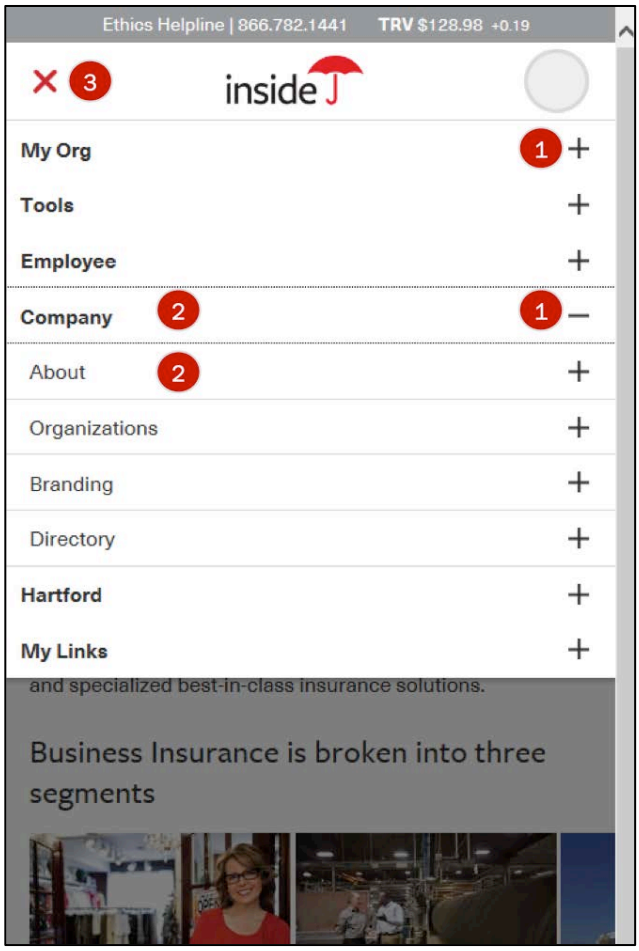
Pictured: Travelers Insurance Intranet Megamenu. Megamenu links are displayed based on the user's role. *127_Travelers_07_Navigation_Live.png*

Megamenu Highlights

The megamenu displays many links at once, well organized in columns and sections. The menus are personalized based on business unit, suggesting the most pertinent intranet areas for each user.

1. **Sections.** Within the global navigation, some items have a second navigation tier in the tabs on the left. The navigation is dictated by the user's role and impacts which links show in the menus. For example, under the main *My Organization* menu, this logged in user sees the *Marketing and Communications* menu because that's the team on which he works. He also sees the *All Organizations* menu, as is true for all users. This approach lets employees see information about all Travelers organizations, but with their own organization most visible and accessible.
2. **Columns with headings.** To make it easy to scan the megamenu's many links, the links are organized into five columns. Each column has a bold, descriptive heading.

Mobile Menu



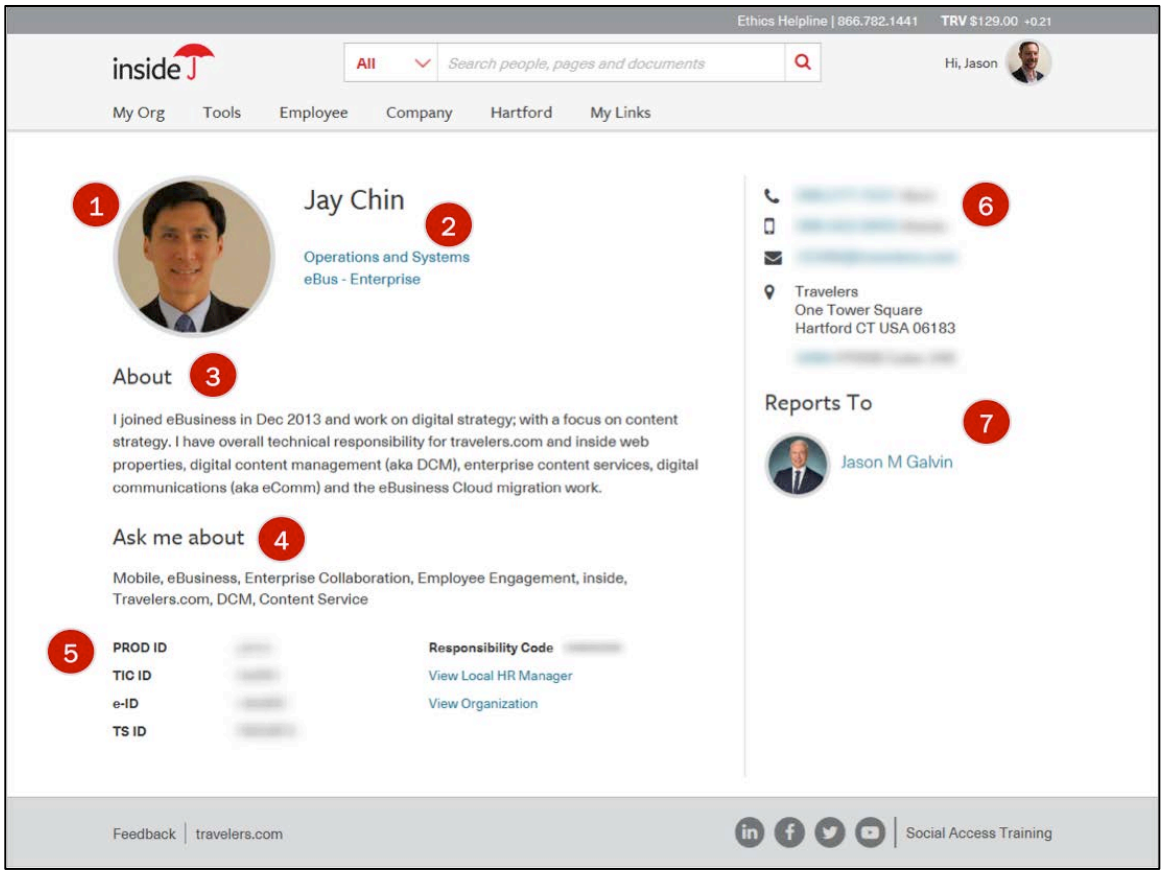
Pictured: Travelers Insurance Intranet Mobile Menu. The global navigation links are mimicked on mobile, but arranged in an accordion list that is easier to interact with on mobile. *128_Travelers_08_MobileMenu_Live.png*

Mobile Menu Highlights

The same top-level navigation topics on desktop appear on mobile, but the mobile menu flows vertically instead of horizontally.

1. **Expand and collapse.** The menu sections are collapsed by default, saving space but still describing the types of links available. Users can click the icons to open and close them. The plus-sign icon indicates a menu can be expanded, while a minus-sign icon indicates the menu is already expanded and can be collapsed. This is a simple but helpful use of icons: both are standard visual indicators that represent the action that will occur (vs. the menu's current state) when the user clicks them.
2. **Sublinks.** Tier-two menu items appear as normal text, while tier-one items are in bold. This difference helps users sense the menu's hierarchy. Tier-two items are also slightly indented, which further indicates their subordination to the outdented items. As with the desktop megamenu's column headers, users can have up to five second-level items in each menu on mobile.
3. **Close.** The global navigation is collapsed by default on mobile to make space for content. Once opened, users must be able to close it to see the content behind it. Clicking a red "x" icon achieves that.

Employee Profile



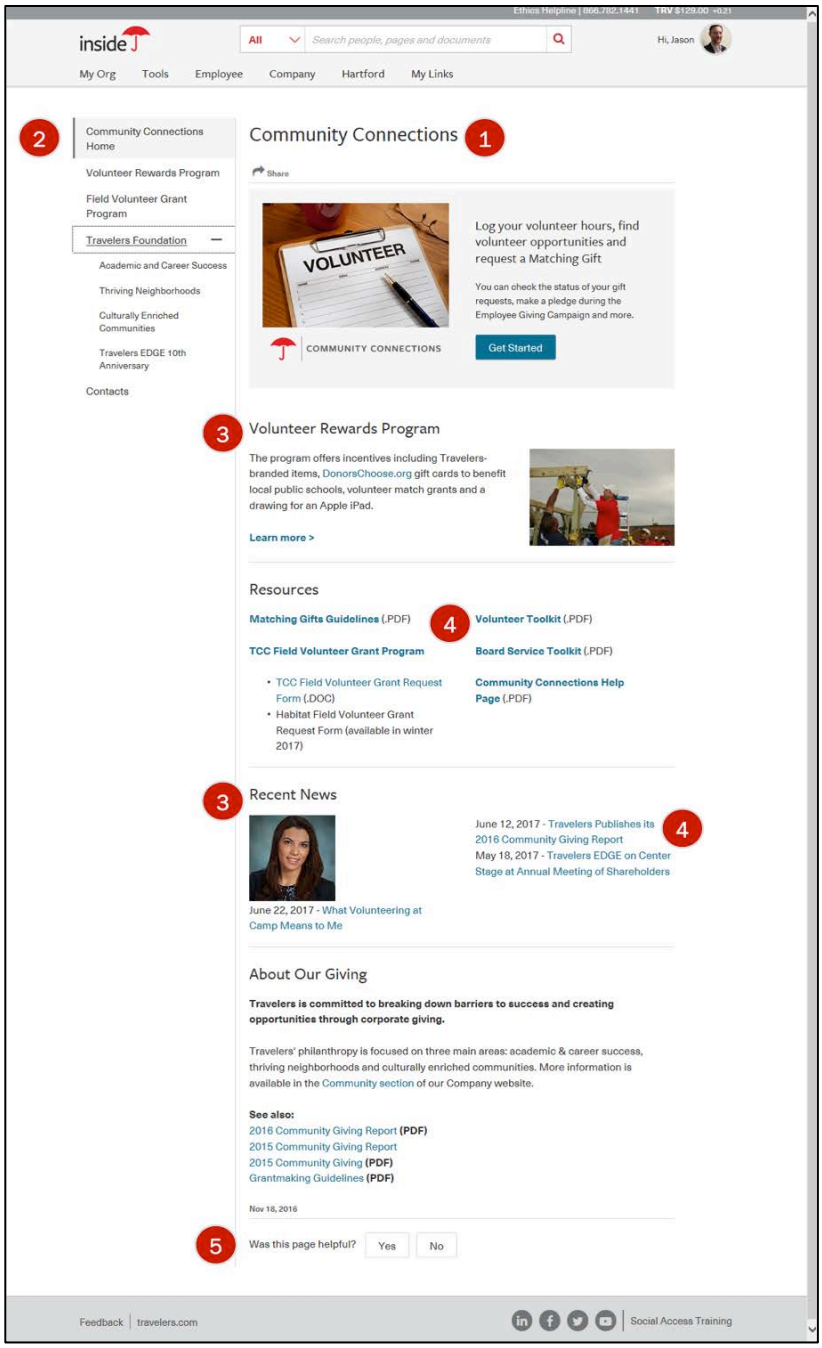
Pictured: Travelers Insurance Intranet Employee Profile. Employees add information about themselves, such as topics they are proficient in, making it easy for all employees to search for people with particular skills on the Travelers intranet. *129_Travelers_09_Profile_Live.png*

Employee Profile Highlights

Employee profiles are the mainstay of many intranets because they help employees find, contact, and learn about one another. Apps, forms, and news are important, but Travelers intranet designers are well aware that it is the people resources make the organization run.

1. **Photo.** A clear, professional photo helps colleagues put a face to a name. Employees can choose their own profile picture to ensure they are comfortable with the photo put out for all of Travelers to see.
2. **Name and organization(s).** The person's name appears in large print, and the organizations where he or she works appear just below that.
3. ***About*.** Because so many people have a public LinkedIn profile and other social pages on the web, it only makes sense that employees write their own professional statement on their organization's intranet. Users provide this content for the *About* section toward the top of their profile.
4. ***Ask me about*.** Like the *About* section above it, employees write their own *Ask me about* sections. This section is a great icebreaker, as employees can choose topics they feel well versed in — or at least very interested in discussing. The label for this area is also a call to action, summoning employees to communicate with one another. Also, because the employee profile pages — including the user-edited content — are searchable via the site search, employees can easily find each other based on the affinities that people include in their profile document.
5. **Details.** Technical IDs and other detailed information appear under the *Ask me about* section. While important, most employees don't need to see this information about their colleagues, so it appears at the bottom of the page, where it is out of the way but still findable.
6. **Contact.** Users can easily find the contact information in the right column, including the person's landline, mobile phone number, email address, and office location.
7. **Manager.** A photo and the name of the person's manager appear under the *Reports To* heading. Clicking the name opens the manager's employee profile.

Department Page



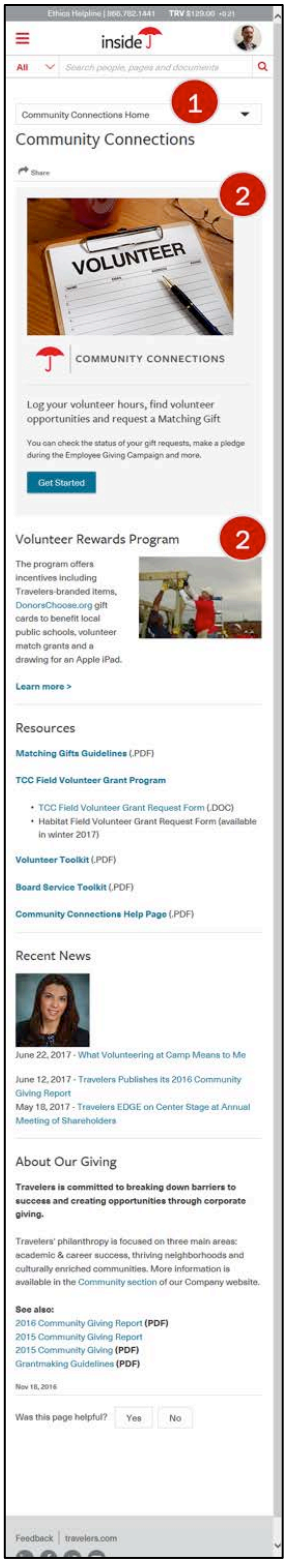
Pictured: Travelers Insurance Intranet Department Page. Through the intranet's many department sections, employees can learn about what various teams do and what services they offer.
130_Travelers_10_DepartmentPage_Live.png

Department Page Highlights

Each department has an intranet section that educates or reminds colleagues about what that department does and the services or information it offers. These sections help employees truly get a sense of their coworkers' roles and how Travelers ticks.

Departments are responsible for the content on their subsite, which means each department can express whatever they feel is most important to convey to Travelers employees.

1. **Title.** The large, dark gray text stands out at the top of the page, indicating the department's name.
2. **Context menu.** The links in the left-side navigation lead to pages within that department's section. The department's main (or *home*) page is first in the list.
3. **Content.** Page content is arranged in sections, each with a subtitle that users can scan to. Pages have plenty of information, but remain uncluttered. The high-priority items have a prominent section at the top of the page and include a large image.
4. **Links.** The links appear as blue text, which makes them stand out against the white page background and contrasts with the standard black text. Links that open files, such as PDFs or Word documents, show the file-type abbreviation after the link. This nicety sets the users' expectations, so when they click the link they are not surprised when a different document opens instead of an HTML page.
5. **Feedback.** At the bottom of each static page is a question: *Was this helpful?* Content and site owners use people's responses to help determine when content should be edited or removed.



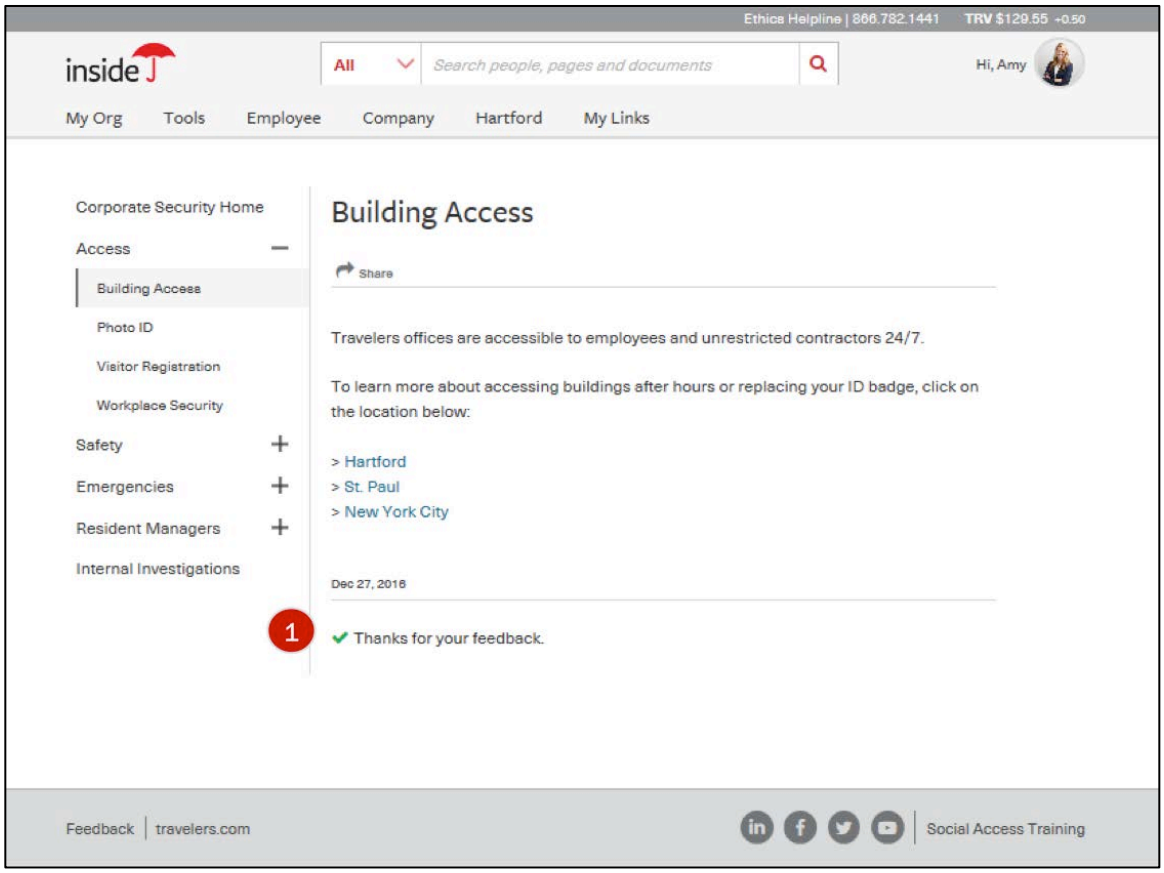
Department Page, Mobile

Pictured: Travelers Insurance Intranet Department Page, Mobile. Content on department pages is formatted in a single-column layout when viewed on a mobile phone. *131_Travelers_11_DepartmentPageMobile_Live.png*

Department Page, Mobile Highlights

1. **Context menu.** The left-side context menu is collapsed in a drop-down list at the top of the page.
2. **Layout.** The content flows in a single-column layout that's easy to digest when reading on a small screen. Text is legible because of the typeface, size, and high contrast between the text and the page background.

Was This Helpful? (“Yes” Response)

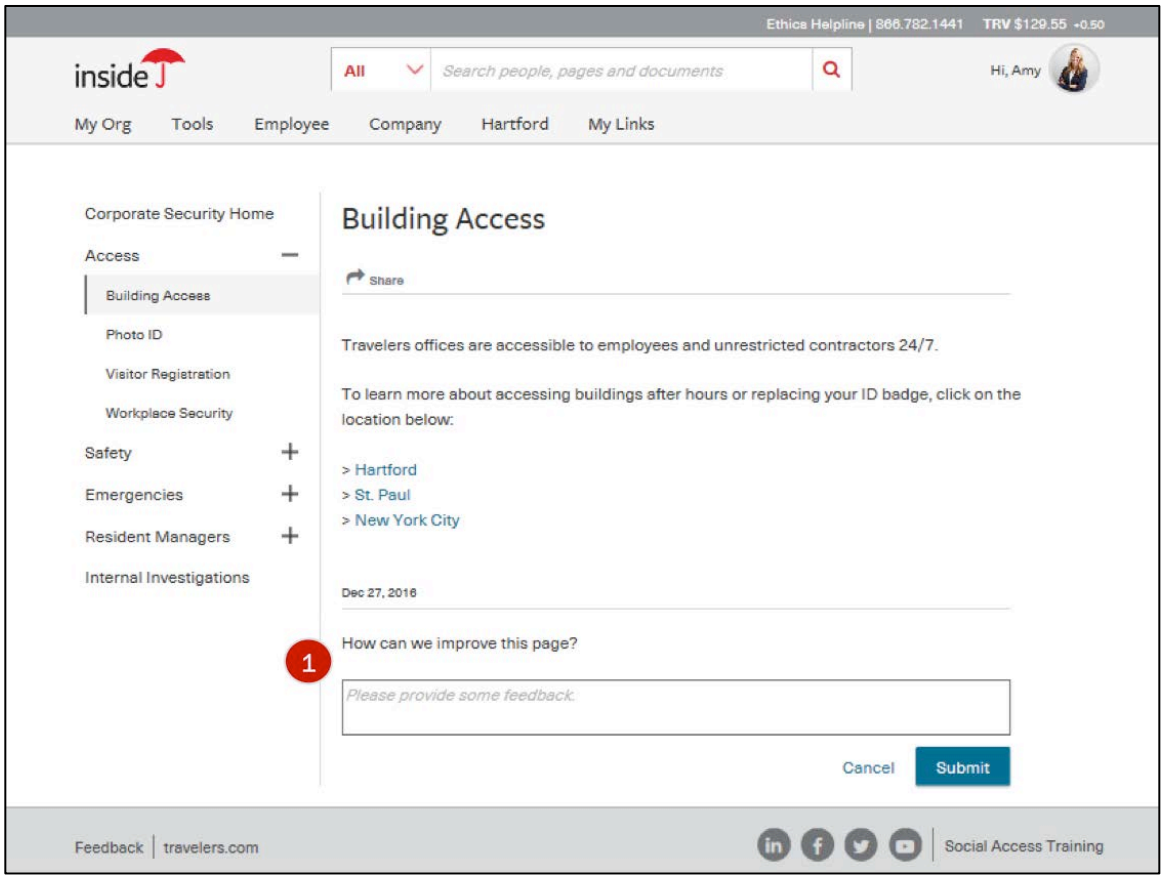


Pictured: Travelers Insurance Intranet Was This Helpful? (“Yes” Response). This confirmation shows that the “Yes” response to the *Was this helpful?* question was sent. *132_Travelers_12_WasThisHelpfulYes_Live.png*

Was This Helpful (“Yes” Response) Highlights

1. **Feedback.** After a user clicks the *Yes* button following the *Was this helpful?* question, the area where the question had appeared is replaced with a green checkmark and the confirmation message: *Thanks for your feedback.* Content owners receive an email when a user clicks “yes.”

Was This Helpful ("No" Response)

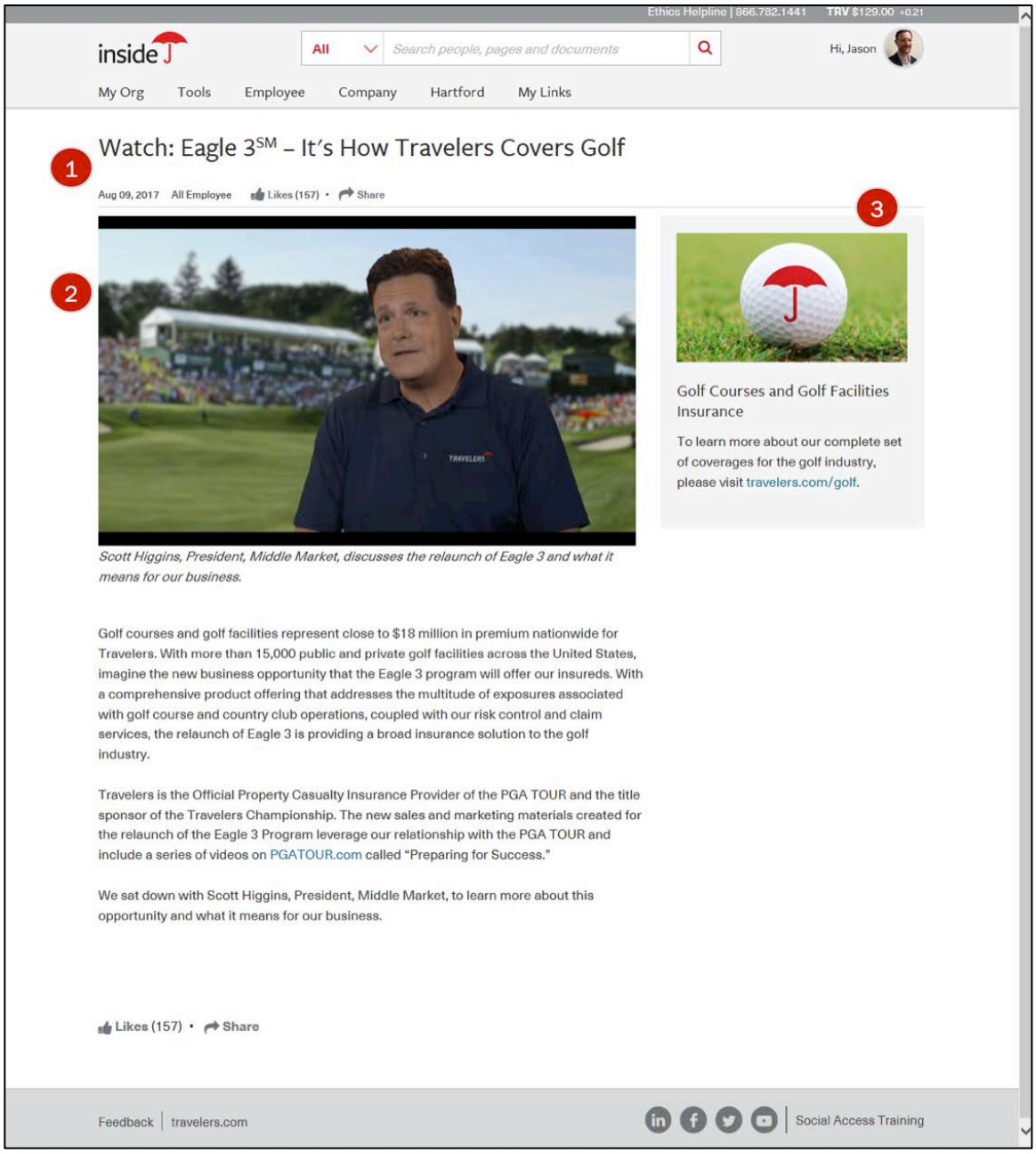


Pictured: Travelers Insurance Intranet Was This Helpful ("No" Response). A response of "No" to the *Was this helpful?* question asks users to suggest how the page could be improved.
133_Travelers_13_WasThisHelpfulNo_Live.png

Was This Helpful ("No" Response) Highlights

1. **Feedback.** If a user clicks the *No* button following the *Was this helpful?* question, the area where the question had appeared is replaced with another question, *How can we improve this page?*, followed by a field to write comments. Content owners receive an email, including the name of the person commenting, so they can follow-up directly with that employee.

Article



Pictured: Travelers Insurance Intranet News Article. News items are abundant on the Travelers intranet, keeping employees up-to-date. *134_Travelers_14_ContentPage1_Live.png*

Article Highlights

To keep employees apprised of company news and events, news pages offer text, video, images, and related links.

1. **Information.** The article's title, date (in an international formal), number of likes, and the share feature all appear near the top of the page.
2. **Image.** A large, engaging image that is closely related to the news item appears at the top of the story.
3. **Right rail.** The right rail can display images, video, calls to action, and other engaging features.

DESIGN PROCESS AND USABILITY WORK

At the start of business case design, the Travelers team enlisted Gagen MacDonald's support to help them understand best practices and trends in intranet design and strategy. Intranets are not an easy thing to research, so they felt it was important to have a partner with insight into what's working at other large, complex organizations.

Reaching Out to Users

Team members conducted focus groups and 1:1 interviews with employees to document Travelers employees' unique intranet needs and preferences. Through this process, they spoke with a diverse mix of employees — across varied businesses, roles, and tenures — to get a holistic view of the existing site's limitations and how a new platform could help them be more productive, efficient, and engaged. From the feedback the team received, it developed four employee personas that served as a strategic document to guide requirements writing and design. It also shadowed employees as they used the site to validate these findings.

Throughout design and development, the team took a highly collaborative approach to ensure that the site meets employee and business needs. With that collaboration goal in mind, it convened a cross-functional team of IT partners, communicators, and other business stakeholders to review where they were and get feedback on the team's mood boards, wireframes, and initial site designs. This informal testing approach ensured that the team was on the right track, while not burdening employees with excessive testing and surveying.

The one design piece that the designers tested with all employees was the proposed global navigation. Using the legacy intranet homepage, they invited employees to complete a card-sort exercise using the key terms that had to be accessible on the intranet. They used these results to inform the global navigation's design.

Information Architecture

Search and an improved IA were the project's top priorities. Information on the old site was poorly organized and made finding information frustrating and time consuming. Often, content was housed under the organization that owned it; for example, facilities requests could be accessed by clicking on "Real Estate," which wasn't intuitive for most employees.

To address this shortcoming, the team began with a thorough content-evaluation exercise, working with more than 30 content owners to determine what among the 14,000 pieces of content would be kept and what deleted during migration to the new site. The designers knew that the sheer volume of outdated or irrelevant pages was contributing to the information-finding problem; conducting this exercise let them reduce content by more than 50%. They then organized the content marked as "keep" into logical buckets of information to model the new intranet's folder and URL structure.

For the global navigation, the team created a stronger, task-based structure that more closely resembled the way users would phrase requests. It then conducted a card sort, followed by two rounds of usability testing to ensure it was exactly right.

Adoption and Buy-in

The Travelers team had to secure adoption and buy-in from two critical audiences: all employees and the business communicators.

Based on what it had learned in creating employee personas, team members knew that Travelers employees already used and accessed *inside* as part of their regular business routines, but the designers wanted employees to understand the new site's added benefits and features. They also wanted users to understand that the significant improvements were designed with them in mind, and that they could provide feedback to continue shaping the site. Coordinated communication and change-management efforts, in partnership with Gagen MacDonald, were critical to this effort.

The Enterprise Internal Communications team drafted and issued launch communications centered on four key features of the new site: personalization, improved search, mobile access, and customization. These communications were not only pushed out through the all-employee news source, but reinforced by business/functional messaging as well. Over the first two months following launch, the team also wrote and posted six feature articles about enhancements, maintaining a regular drumbeat of reminders about site capabilities.

In addition to launch communications, the team implemented tour functionality on the home and profile pages to highlight new and improved features. The tours appeared when users first logged in, and they were given the choice to: take the tour, receive a reminder at a later time, or never see it again. As of this writing, more than 15,000 users have completed the full homepage tour and 5,312 have completed the employee profile tour. Also, when new site features are added, the team adds tours to highlight what's new.

Although all employees were a critical audience, business communicators were even more critical stakeholders. Personalization was a priority feature of the new site, but without content to populate it, the site would fall flat and remain corporate-centric. Team members thus began building this relationship during the earliest days of scoping and requirements writing and all throughout design. In addition to conducting intake with communicators about their needs, the team also established an Intranet Communications Council (ICC), made up of all business and functional communicators. The ICC served as an advisory committee throughout the build, meeting monthly to review progress, make key decisions, and discuss what was required of it. This committee continues to meet to this day on enhancements, metrics, and content strategy.

Some communicators were initially intimidated by the homepage's dedicated space for the function they supported — and the expectation that they fill that space. However, usage has increased every month since launch, with business units and functions posting an increasing amount of personalized content for users through their dedicated news sources. The Claim Communications team has even used the site to relocate a twice-weekly email newsletter and to expand its content to be more locally relevant.

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Gagen MacDonald	• Partnered with the Enterprise Internal Communications team to closely collaborate throughout scoping, design, build, and launch. Activities included: • Created user personas to inform site design • Developed detailed stakeholder analysis • Provided trends, insights, and best practices in intranet design and strategy • Designed business case presentation for socialization with key audiences • Designed IA and site taxonomy • Drove content evaluation, migration, and CMS training efforts • Created site guidelines and training materials • Drafted launch communication and change-management plan and materials • Informed site metrics report and designed user survey
Accenture	• Served as second Agile development team (offshore) on US site launch to speed delivery time • Augments onshore development team staff
Fjord (Design & Innovation from Accenture Interactive)	• Created user journeys and story mapping • Conducted card sort to help guide IA design • Developed mood boards and site wireframes

GOVERNANCE

Ownership

Enterprise Internal Communications, which sits within the Marketing & Communications organization, is the intranet's primary owner. The intranet is supported by eBusiness, which sits within the Technology function. Enterprise Internal Communications oversees site strategy and content, and was the initiator of the new intranet project. eBusiness is responsible for all of the site's technology aspects and leads their development.

The two teams have coordinated closely throughout *inside*'s history, from the legacy site through the build phase and the new version. In the Agile model, Jennifer Renwick, Senior Director, Internal Communications, serves as product owner, working daily with the development teams to set priorities and ensure execution.

Together, these teams have collaborated successfully to ensure the site is meeting employee needs and expectations.

Decentralized Governance

On the previous version of *inside*, businesses had to issue requests to publish their content. In some cases, simple changes to pages could take up to six months to be completed; requests for new functionality or something complex took even longer. The intranet now puts control back in the users' hands through a decentralized governance model.

Today, nine business unit and function communication teams lead their own *content* strategies, creating and personalizing homepage news and information. This approach more effectively anticipates user needs, gives users relevant information, and removes inefficiencies and unproductive competition. It has also resulted in a reduction of one-off email communications. The new intranet design lets authors control their navigation in the global mega-nav and in the left rail navigation within subsites. Authors can also publish and link to videos without IT intervention. These changes have decreased the time and resources IT needs to manage simple changes.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Redesign Lead	• Spearhead redesign efforts, including business case creation and socialization, requirements writing, design, and execution • Coordinate with leaders and key business stakeholders to ensure buy-in and alignment • Act as product owner on the Agile development team
Corporate Content Team	• Manage content strategy and editorial calendar for all employees enterprise-wide • Work with business/functional teams to ensure a regular cadence of engaging content • Support content migration, training, and new content owners
Business / Functional Content Teams	• Create news and content personalized to their business unit/function • Drive promotion and adoption within business unit/function • Participate on ICC to influence the site's overall design and direction
Content Owners	• Keep static, non-news pages updated
Technical Development and Support	• Lead development of new intranet • Drive ongoing creation of new features and functionality as determined by product owner • Provide thought leadership and counsel on UX and interface

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	http://inside.here.travp.net/
Default Status	*inside* is set as each user's homepage on Internet Explorer and Chrome. Users cannot change the setting.
Remote Access	Users can access the site via company-managed devices, including laptops and mobile devices. Mobile devices require AirWatch to access the site.
Shared Workstations	Some employees in call centers share workstations across multiple shifts.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
Unknown	• Intranet history prior to 2008 is unknown due to a complex history of mergers
2008	• First iteration of what is now legacy *inside*
2011	• Minor visual redesigns of homepage
September 2014	• Planning for new intranet begins with Gagen MacDonald
2015	• Minor visual redesigns of homepage
December 2015	• Business approval and funding achieved
April 2016	• Development begins
February 2017	• *inside* US launches
March–September 2017	• Release monthly US site enhancements
October 2017	• *inside* Canada launches
2018	• *inside* Europe launches
Overall redesign timeframe: 2.5 years	

CONTENT AND CONTENT CONTRIBUTORS

Content Managers

Three people in the core content team (Enterprise Internal Communications) manage content related to all employees and the US site.

Approximately 15 business communicators manage personalized news content for their users, and more than 80 additional people create, review, or approve content.

Culling Content

A primary problem with the former site was its outdated and irrelevant content. It bogged down search results, created a messy IA, and was the underlying cause of most of the UX frustrations. When the company set out to redesign the intranet, it made a goal to delete at least 50% of the site's content.

When the intranet team audited the legacy site, it found more than 14,000 unique pieces of content — pages, documents, and images — that had no metrics on date created or last updated. The team therefore had to ask each individual content owner to mark his or her content as "keep" or "remove," and gave clear guidelines on each category's attributes. The team also reminded the owners that they not only had to migrate every page to the new system, but they also had to maintain all content annually in keeping with the new governance process. So, on their own — and without much further persuading — content owners tagged 52% of the legacy site content for deletion.

Maintaining Content Quality

The team knew it had to strike a careful balance between a decentralized governance model that let businesses do as they choose and maintaining site quality. To accomplish this delicate balance, it opened a dialogue with communicators and content owners, provided ongoing training, and created guidelines and standards to ensure that the site maintains its integrity. Following are two examples of how that plays out:

- **Static content.** For owners maintaining somewhat static, reference-style content, the team strongly suggested revising pages during the migration to ensure that they were current, relevant, and well designed. To help guide their thinking, the team gave these owners general best practices for web communications and examples of strong pages. The team also implemented the *Was this helpful?* button at the bottom of pages to flag content that users weren't happy with and ensure quality control. Further, the team "expires" these static pages annually — notifying content owners that the pages must be either updated and republished, or deleted.

- **News content.** Business communicators who publish news can draft, design, and publish all of their own content to their "news source" tag, calling on the Enterprise Internal Communications team for support or counsel as needed. They can publish as little or as frequently as they'd like or as their business unit requires. Rather than mandate specific timing to publish new site content, the intranet team encourages embedded communications to reallocate content going out through other channels, such as email, to the site. Also, on the new intranet, all pages include author names to drive further accountability for content.

With the exception of news pages, which are archived for reference purposes, the intranet team is now in the process of deleting all of the old content from the legacy site.

Training

Since November 2016, the team has offered monthly training for all communicators and content owners, who can participate in as many sessions as they'd like to refresh their skills. They can also access a library of training materials whenever they choose. The Enterprise Internal Communications team is available to answer questions, provide support, and coordinate with the eBusiness team to troubleshoot issues.

TECHNOLOGY

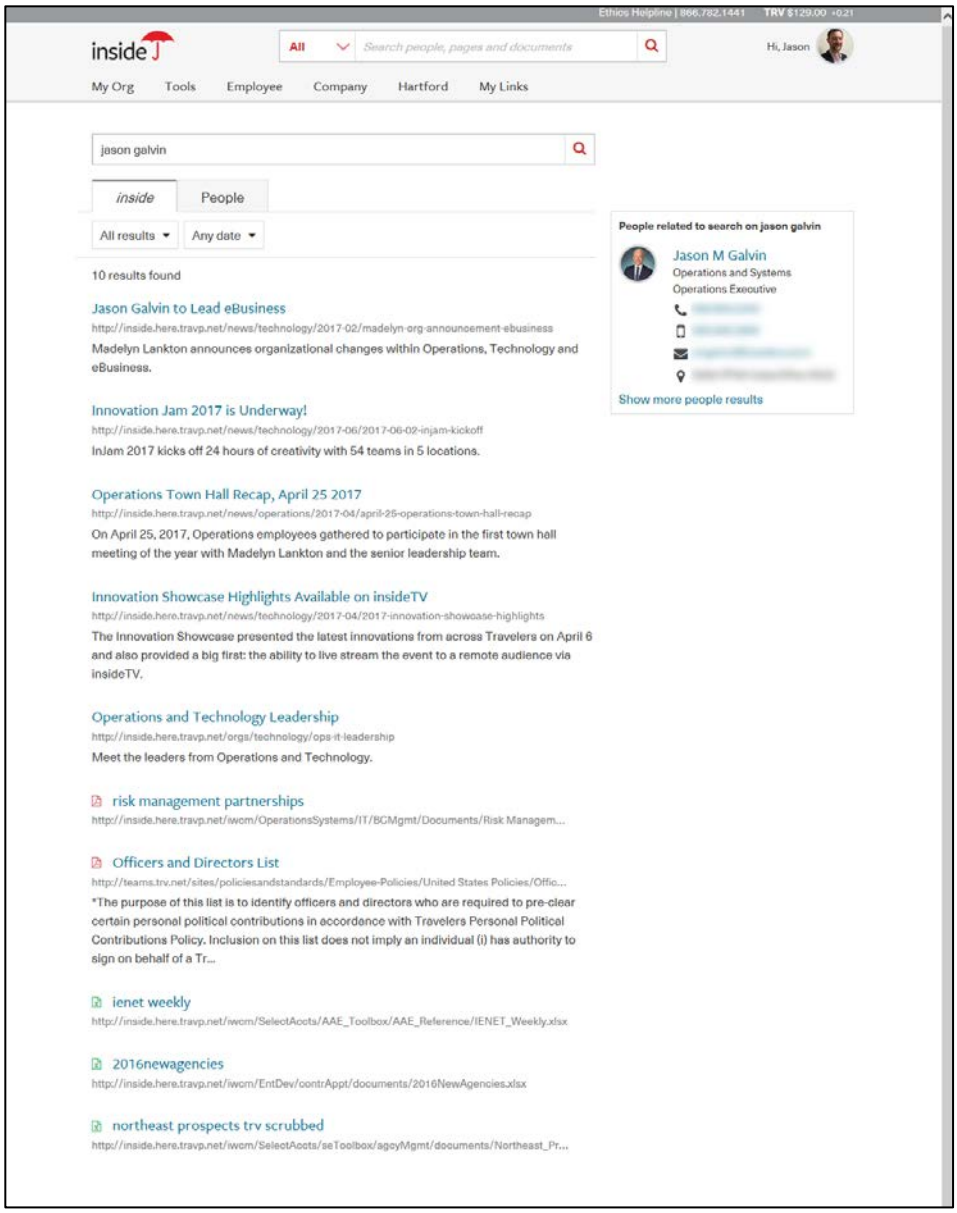
TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Microsoft IIS
Bug Tracking / Quality Assurance	• HP Quality Center
Design Tools	• Axure and Axshare
Site Building Tools	• *inside* is primarily an ASP.net MVC app
Content Management Tools	• Opentext CMS
Search	• HP IDOL
Analytics	• IBM Digital Analytics
Other Functions	• Multiple microservices were built to integrate *inside* with other enterprise assets; typically, they were built with node.js or .NET

Search

Global search on *inside* leverages HP IDOL technology to search all intranet content, the company's people directory, and *My Site*, which houses the customized information employees add to their profiles.

With the new design, employees can search both the intranet and people from a single global search function. When performing a search, users see two types of results: content on *inside* and people related to that search. They can then filter their results by a variety of options. *inside* results can be filtered by type (Pages, News, PDF, Excel, Word, and PowerPoint) and by date (past 7 days, past 30 days, and past 6 months). People results can be filtered by location, division, and department. The team's goal was to offer filters that met users' needs without overcomplicating the options.

Team members regularly work to improve the relevancy of search results. They launched the site with a list of promoted terms that will return at the top of results, and they add to that list frequently. The list also includes injected promotional results from myHR, a separate site for benefits, compensation, and other HR-related items. Team members regularly analyze search performance, including the top search terms, and adjust search tuning, promotions, and metadata accordingly.



Pictured: Travelers Insurance Intranet Search. On the new intranet, employees can search both the intranet and people from a single global search function. When performing a search, users see two types of results: content on *inside* and people related to that search. Users can then filter *inside* results by type or date, and people by location, division, or department. *135_Travelers_15_GlobalSearch_Live.png*

Mobile

The legacy version of *inside* did not have a mobile presence. Employees can now access the directory and other intranet content from their mobile device via AirWatch Browser. Although the initial solution was a fully responsive homepage, the team is now narrowing the mobile version to include only search, navigation, and quick links, as these are the items employees most need while on the go. The team is also

working with the company's mobile team to make accessing the mobile version more intuitive through a Travelers-styled icon.

Mobile is still a work in progress, but has already delivered solid wins. For example, the company's Claim business unit has a priority initiative to enable a growing mobile workforce and was recently able to shelve a multimillion-dollar project and use the new *inside* intranet platform instead. This team is also making an effort to move key knowledge documents off of SharePoint and onto the intranet, as it is more mobile friendly.

ROI

Nearly every action a user takes on the new intranet is tracked and reported in a monthly rollup to the intranet team. However, because the intranet's legacy version lacked metrics for the two-years before migration, the team has not been able to measure comparative usage. Instead, it tracks the new site's performance month-over-month. It also tracks qualitative successes that are big wins for the company's employees, such as eliminating the need for a twice-weekly email newsletter to all Claim employees.

Given the new intranet's accurate metrics, the team can confidently adjust the site on a regular basis. A simple example of this is the use of search metrics. Looking at search terms and the links users select on the results page, the team can tweak the search algorithms and navigation to reduce the steps for users.

The team has also received positive feedback from leaders and the businesses, all of whom are using the intranet more frequently to drive their communication efforts.

LESSONS LEARNED

Renwick explains some of the lessons learned through this redesign project:

- **Sometimes you have to go at the organization's pace.** "In 2014, when we first started this project, we knew we wouldn't be able to gain organizational buy-in and budget for some time. But we also knew we could get a lot of meaningful work done in the meantime. During the one-year plus that it took to socialize the intranet redesign with the right stakeholders, we researched and documented stakeholder needs, hosted employee focus groups, created user personas, wrote detailed business requirements, created draft wireframes and IA, and established a governance model. This enabled faster alignment with development teams and agency partners — and, ultimately, a more efficient build process."
- **Intake and research are essential, but won't tell you everything.** "We were diligent about talking to employees of all types to understand what they liked and didn't about the legacy site, but there were still some surprises. For example, we removed the *My Stocks* customization feature and showed just the Travelers stock price. Our interviews hadn't revealed anything telling about this feature, and we figured employees were accessing that information through one of the many other mechanisms like Google, their smart phones, etc. Almost immediately at launch, we heard from a lot of disappointed employees. While we didn't bring that feature back, there was a similar case where we did.

"We heard *My Links* (bookmarks) on *inside* were by far one of the most popular and valuable features of the legacy site, so we not only kept it through the transition, but also made it more accessible and dynamic. We added it to the global navigation (as opposed to just the homepage) and gave employees the ability to organize their links into categories. We were feeling great about the new enhancements, but found that employees were frustrated by the additional click required to open up their navigation menu. Thanks to Agile, we were able to quickly add 'pin to homepage' functionality to *My Links* within a few months of launch."

- **Always put the business at the center, and don't be afraid to give up some real estate and control.** "Corporate had been the only source of content on *inside* since its inception, with 100% of homepage real estate owned by the Corporate Communications team. This same communication team led the redesign, but knew that lessening its footprint was in the best interest of the user. We worked to find a balance where corporate could get out the messages it needed to, while allowing businesses/functions equal space and stature."
- **Search reigns supreme.** "The world was our oyster when we started this project, but we were never distracted from what we knew employees needed most: to find what they were looking for quickly, easily, and intuitively. To make that happen, search had to work — and work well. Throughout all phases of design and build, we were incessant about ensuring the effectiveness of search, sometimes setting aside the cooler, more modern enhancements to make it a priority. Today, I'm proud to say search is very effective."
- **Never stop improving or asking for feedback.** "We knew we wouldn't get everything right at initial release, and encouraged employees strongly to provide their feedback, likes/dislikes, and suggestions. During the first three months, every communication ended with a prompt for employees to share their ideas for improvements, with a link to a general inbox we managed. In three months, our project team responded to — and in many cases, acted upon — more than 1,100 email suggestions from intranet users.

  "We are also on a monthly release cycle to ensure we're continuing to improve and make enhancements to the site. Since initial release in February 2017, enhancements, new features, and technical updates have been implemented at least monthly — a model that more closely mimics what employees experience in the outside world. Future enhancements include adding commenting, profile badges, and advanced user experience testing, among others."

Anthem, Inc. (2019)

OVERVIEW

COMPANY

Anthem is working to transform health care with trusted and caring solutions. The company's health plan companies deliver quality products and services that give their members access to the care they need. With over 73 million people served by its affiliated companies, including nearly 40 million within its family of health plans, Anthem is one of the nation's leading health benefits companies.

Headquarters: Indianapolis, IN, US

Company locations: All across the US

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

Annual revenue: Approximately $90 billion USD in 2017

THE INTRANET

Users: All Anthem associates and the majority of the company's contractors use the company's intranet, Pulse, on a daily basis. Anthem's intranet is designed to provide users with an experience that aids both in daily tasks and personal needs through its advanced SSO HR portal. The intranet is used for both internal and external customer service needs and was designed as a one-stop-shop.

Mobile approach: Responsive web design

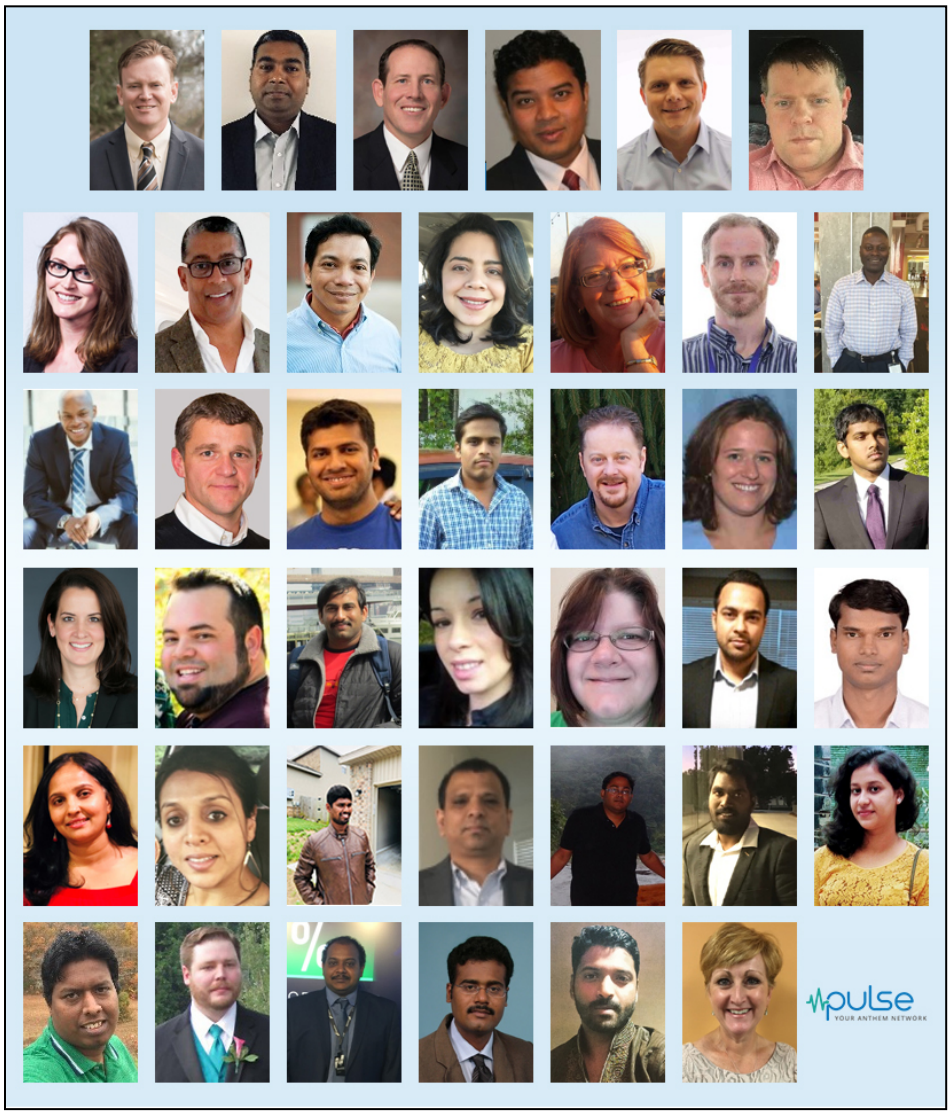
Technology platform: Oracle WebCenter Suite 12c

TEAM

Leadership: Peter Lobred, Staff VP Enterprise Communications; Ramesh Aki, Director II Technology; Mike Berry, VP HR Service and Solutions; Sanjeeva Kodimala, Director I Technology; Christian Jansen, Director Corporate Communications; Brendan McGarret, Manager II Technology.

Design and development: Amanda Aszman, Corp. Comm. Specialist Sr.; Andre McMillan, Software Architect; Anthony Francisco, Developer Advisor; Arlen Vargas, UX/UI Designer Lead; Barbara Howrey, Systems Analyst Sr.; Brian King, Developer Advisor; Calvin Grier, Security Analyst Sr.; Cole Smith, Systems Analyst; Daniel Smith, Scrum Master; Devi Shailender, UX Designer; Dinesh Bandari, Developer Sr.; Doug Glaze, Developer Advisor; Emily Gosselin, Initiative Project Leader; Harsha Kakumanu, Developer I; Jenn Minder, Staff VP, Communications; Joe Moro, Developer Advisor; Kamalakar Peta, Developer; Leslie Williams, QA Lead; Mary Katherine Lane, Systems Analyst Sr. Advisor; Prashant Baliyan, Content Developer; Raja Raja Chozhan Velayutham, Developer; Rajani Saini, Systems Analyst; Rajvi Jariwala, Developer Advisor; Raviknth Kolagatla, Front-End Developer; Shiva Ram Krishna Pandla, QA Analyst; Sourav Mohapatra, QA Analyst; Srikanth Narala, Front-End Developer; Subhashree Mishra, QA Analyst; Suresh Loganathan, Developer Lead; Tim Schluttenhofer, Scrum Master; Veera Vantipalli, Developer; Vengadessane Sittanandam, Performance Analyst; Vikas Reddy Yelguru, Developer; Whitney Kelso, Administrative Assistant II.

INTRANET TEAM



Team members shown here (top row, left to right): Peter Lobred, Ramesh Aki, Mike Berry, Sanjeeva Kodimala, Christian Jansen, Brendan McGarret; (second row, left to right): Amanda Aszman, Andre McMillan, Anthony Francisco, Arlen Vargas, Barbara Howrey, Brian King, Calvin Grier; (third row, left to right): Cole Smith, Daniel Smith, Devi Shailender, Dinesh Bandari, Doug Glaze, Emily Gosselin, Harsha Kakumanu; (fourth row, left to right): Jennifer Minder, Joe Moro, Kamalakar Peta, Leslie Williams, Mary Katherine Lane, Prashant Baliyan, Raja Raja Chozhan Velayutham; (fifth row, left to right): Rajani Saini, Rajvi Jariwala, Raviknth Kolagatla, Shiva Ram Krishna Pandla, Sourav Mohapatra, Srikanth Narala, Subhashree Mishra; (bottom row, left to right): Suresh Loganathan, Tim Schluttenhofer, Veera Vantipalli, Vengadessane Sittanandam, Vikas Reddy Yelguru, Whitney Kelso.

HIGHLIGHTS ABOUT THIS WINNER

The team behind Anthem's Pulse intranet described its three goals for the intranet's design as: 1) connect, 2) inform, and 3) continually improve the UX. Without question, the team achieved all three goals with flying colors. The intranet gives an inordinate yet manageable amount of information about HR, the company, and individuals. In addition, its collaboration features make it commonplace for individuals to work together. Finally, the UI iteration history and the team's future plans promise that the design will continue to evolve and make the UX even better.

- **HR:** It's not surprising that a health insurance company would have a good HR section on its own intranet, but Anthem's is still unexpectedly impressive. Pulse's comprehensive *Human Resource* section makes it possible for users to discover and find valuable tools, benefits, and content that can improve their work and personal lives. Personalized benefits information and self-service options put employees in control and give them clear options to improve their well being. Performance-improvement and other educational content demonstrate that the organization is highly invested in its employees.
- **Personalized and customizable:** Applications, news, and a helpful dashboard are among the areas tailored to each employee. This declutters the intranet and pushes only the right content to the individual.
- **Brand and logo:** Not every intranet has a name, and many lack their own logo. Pulse, however, has both. Together, they help make the intranet both an easily recognized and referenced tool and a force in its own right.
- **Comforting color palette:** Light blue, royal blue, and grey make a pleasant palette for pages, while punches of orange make buttons and other elements visible. By subtly working in Anthem's traditional healthy brand color palette and adding a dash of flare, Pulse stands out without calling undue attention to the design.
- **Dashboard to apps, favorites, and more:** The dashboard feature includes icons that link to key apps—some of which are personalized to the user, such as the corporate calendar—and to the user's customized apps list and favorites. This always-available dashboard appears near the site's global navigation.
- **Communities:** Communities let any employee create a space to communicate information about a topic or project. Communities include an overview, key resources, events, and blogs. Pulse communities are separated into three categories: *State Communities* include associates located in a specific state; *Communities of Interest* let any associate create a customized community; and *Business Communities* directly relate to the Anthem business.
- **Robust people search:** On any page, the *People Finder* lets users easily search for colleges using either simple or elaborate queries, and then see thorough results within moments.

- **Rich employee profile:** The employee profile houses a large amount of information about each employee. This helps employees get to know one another and work together. The profile area also lets users create and manage their lists of important applications and bookmarks.
- **Reporting issues:** Pulse includes a section that lets employees know that it's okay—and even encouraged—to report issues they notice on anything related to ethics, finance, fraud, or security. A tool consolidates possible issues and links to descriptions to help identify issues and methods to report them. This shows that Anthem wants employees to speak up, and that their voices matter.

BACKGROUND

In 2016, Anthem embarked on a project to create a new, customized intranet that would not only inform and educate users through communication technologies, but also aid in their day-to-day tasks. As a company in the health care industry, it has numerous customers who rely on accurate information on a minute-to-minute basis. Anthem therefore required a best-in-class system that would empower its internal associates to serve customers with great care, accuracy, and commitment. Prior to Pulse, Anthem used an intranet called WorkNet, which had become outdated and cumbersome. Anthem needed a new solution that would serve its current needs as well as provide a foundation for its needs for many years to come.

As with any project, the new Anthem intranet came with its own set of obstacles, but none that proved too difficult for the team to overcome. A dedicated and diversified team of Anthem associates from several enterprise areas set out on a multifaceted mission to create a best-in-class intranet experience for each and every user.

Starting small was the name of the game when the idea for the new intranet—Pulse—first came to be. The Anthem team knew it had to aim high, but it also knew that taking on too much would surely mean delays and unavoidable mishaps so it kept even the team size intentionally small. This small but mighty group soon adopted the adage: *No idea is a bad idea*.

Anthem has many different business areas with needs that deserve attention and consideration, so the Pulse team was comprised of diverse individuals representing each of the functional areas. One of the team's first tasks was to brainstorm project objectives, which it did through a series of sessions. Because the intranet had not been updated for more than 10 years, identifying needed changes was rather easy. The question was: *Which changes were of the highest priority?* And, as a follow-on: *Which approach would be best to implement those changes?* The team clearly had enormous opportunity and potential for success, but to achieve it, a strategic and methodical approach was needed. The team could not rely solely on the input of its members—especially within such a large organization—so a Pulse Ambassador Committee was formed made up of volunteer associates from across the company to aid in specific tasks, including surveys, focus groups, and early adoption testing. As the project progressed, the Ambassador Committee, along with the Pulse Steering Committee, proved invaluable in validating appropriate solutions and processes.

The Anthem team used an Agile approach throughout the entire Pulse creation process, and continues to use it today as the site evolves. Agile lets the team pivot quickly without being too disruptive. During primary development, regular backlog

grooming sessions and daily Scrum calls helped keep the team on task, connected, and engaged. And, in an effort to continue to listen to Pulse users post launch an internal suggestion box was set up. Feedback received through this mailbox has helped the team identify what users like, don't like, and find most relevant. The team has also been able to keep a running list of suggested features that may be added to the site as it evolves. The team has found that being open to suggestions from the user base is extremely important and valuable.



Pcitured: Anthem Previous Intranet Homepage. The homepage of WorkNet, Anthem's previous intranet.

DESIGN REVIEW

Homepage



Pictured: Anthem's New Pulse Intranet Homepage. News, access to tools, and a lovely color palette make the new Anthem intranet homepage supportive and pleasant.

Homepage, Highlights

The Anthem intranet homepage offers personalized news and a customizable apps list so users can easily see what's important and access what they need each day.

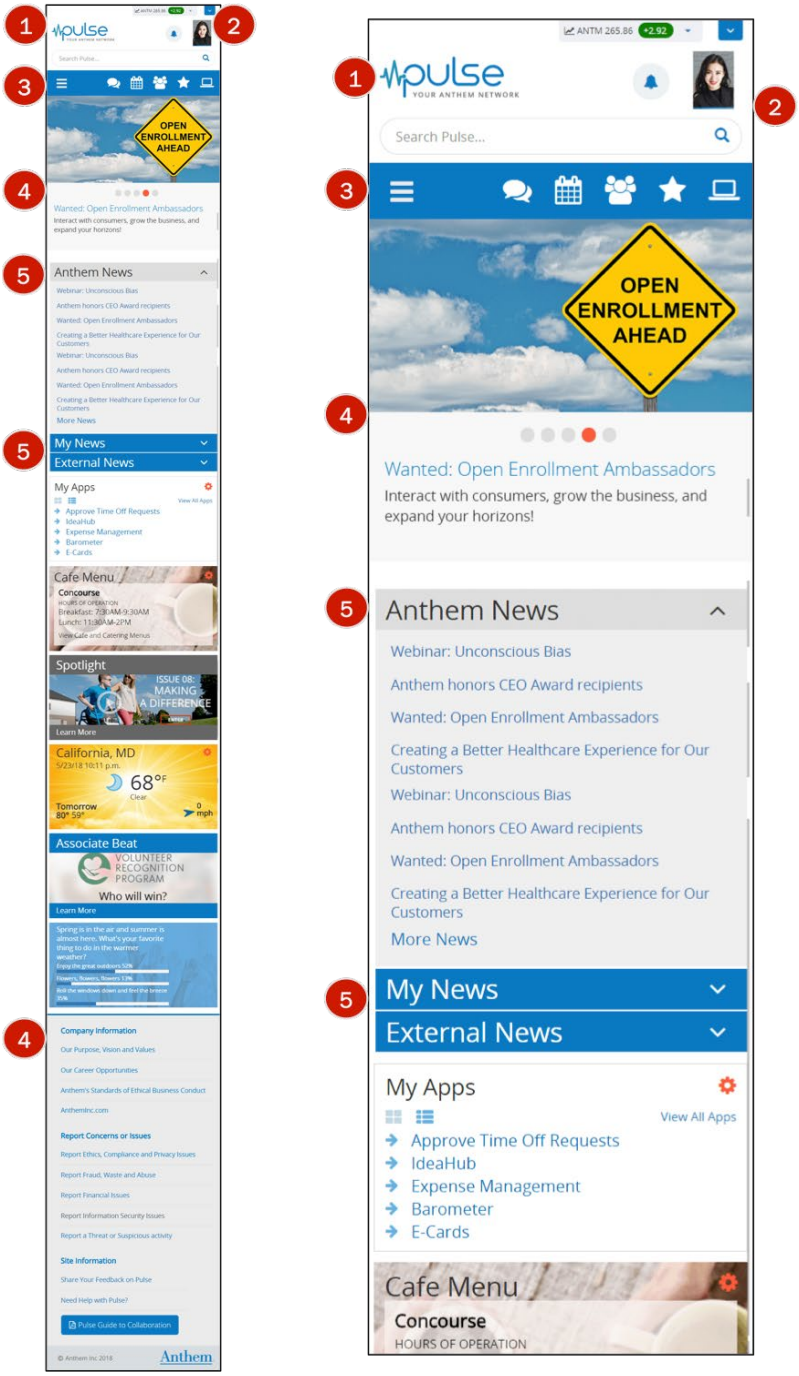
You can't help but notice the intranet's color palette—light blue, royal blue, grey, and black—along with judiciously used punches of color (such as green for an elevated stock price). The palette creates a calm vibe and supports the content without taking attention away from it.

To ensure that everyone can find the intranet easily, all Anthem associates have Pulse set as the homepage in their web browser, and a shortcut icon to Pulse is on their computer's desktop.

1. **Logo:** The name of the intranet, *Pulse*, is embedded in the intranet's logo, along with the tagline: *Your Anthem Network*. This immediately tells users where they are and what the tool is for.
2. **Utility navigation:** The far upper right houses a few tools, including stock price, *Site Tips*, site search, an alerts icon, and the logged-in user's photo. These are items employees might need at any time and appear on each Pulse page. Also, search and login appear in the upper right of pages, where users expect to see them.
3. **Global navigation:** A narrow global navigation structure puts forth just four top-level navigation links: *Collaborate*, *Human Resources*, *Our Company*, and *Tools & Resources*. Because the labels are distinct, it is easy for users to scan the links and make a selection. Further, the blue text pops on the white background, making it easy to see. Breadcrumbs in the upper left of pages help users see where in the IA they are.
4. **Dashboard icons:** Each user has a personalized, customizable dashboard with apps, favorites, and more. Icons appear to the right of the global navigation menu; because these icons lead to commonly used and highly important Pulse sections, they are always available.
5. **Carousel:** The five most important articles rotate in the carousel at the top of the homepage. The title, a short summary, and an image help engage employees.
6. **News:** A tabbed news section below the carousel separates the news into three different categories: 1) *Anthem News* focuses on the enterprise, including HR, tools and resources, and general company news. 2) *My News* is personalized news related to user's community, groups, and so on. 3) *External News* focuses on public media mentions of Anthem. The labels for each news type are clear and their tabs are visible, with the selected one changing from grey to blue. This is a highly successful interface element. Including both the news carousel and a tabbed news section on the homepage make the news highly visible. In fact, these UI elements increased Anthem's internal news engagement by 256%.
7. **Applications:** The homepage's *My Apps* section appears below the carousal. Here, without clicking or hovering, users can immediately see their list of apps. The small icons in the upper left of the apps section let users show the apps as a list or as large icons. The orange gear icon lets them edit their apps list. Finally, the *View All Apps* link leads to a list of all applications available to them. This area makes it a breeze for employees to find and access their common tools.
8. **Cafeteria menu:** It is not surprising that the cafeteria menu is an important feature for intranet users. After all, don't most of us want to know where our next meal is coming from, and what that meal will be? The *Café Menu* section lists the hours of operation and a link to the menu for the café and catering. A happy belly helps make a happy employee.

9. **Promoted content and polls:** Sections for current initiatives and polls appear in the same row below the news. Users look here to see interesting and sometimes fun elements, and to see their colleagues' answers to the current poll.
10. **Weather:** Health-conscious health-insurance employees can get a glimpse of the weather outside just by looking at the Pulse homepage. Anyone who wants to go out for a dose of vitamin D or an adrenalin-pumping bicycle ride can see the weather outside in the weather section. The background image illustrates current conditions, such as showing clouds or a sun.
11. **Fat footer:** The footer at the bottom of the page is delineated by a blue line and a background grey that is slighter darker than that of the homepage. The text for the three columns headings is darker than the rest of the links, making it easy for employees to scan the main topics. The footer includes company information, methods for reporting concerns, help contacts for the intranet and its collaboration tool, and a link to share feedback. The footer appears on every page since these are important links, but not ones that people need to see in the global navigation or above the fold.

Home, Mobile



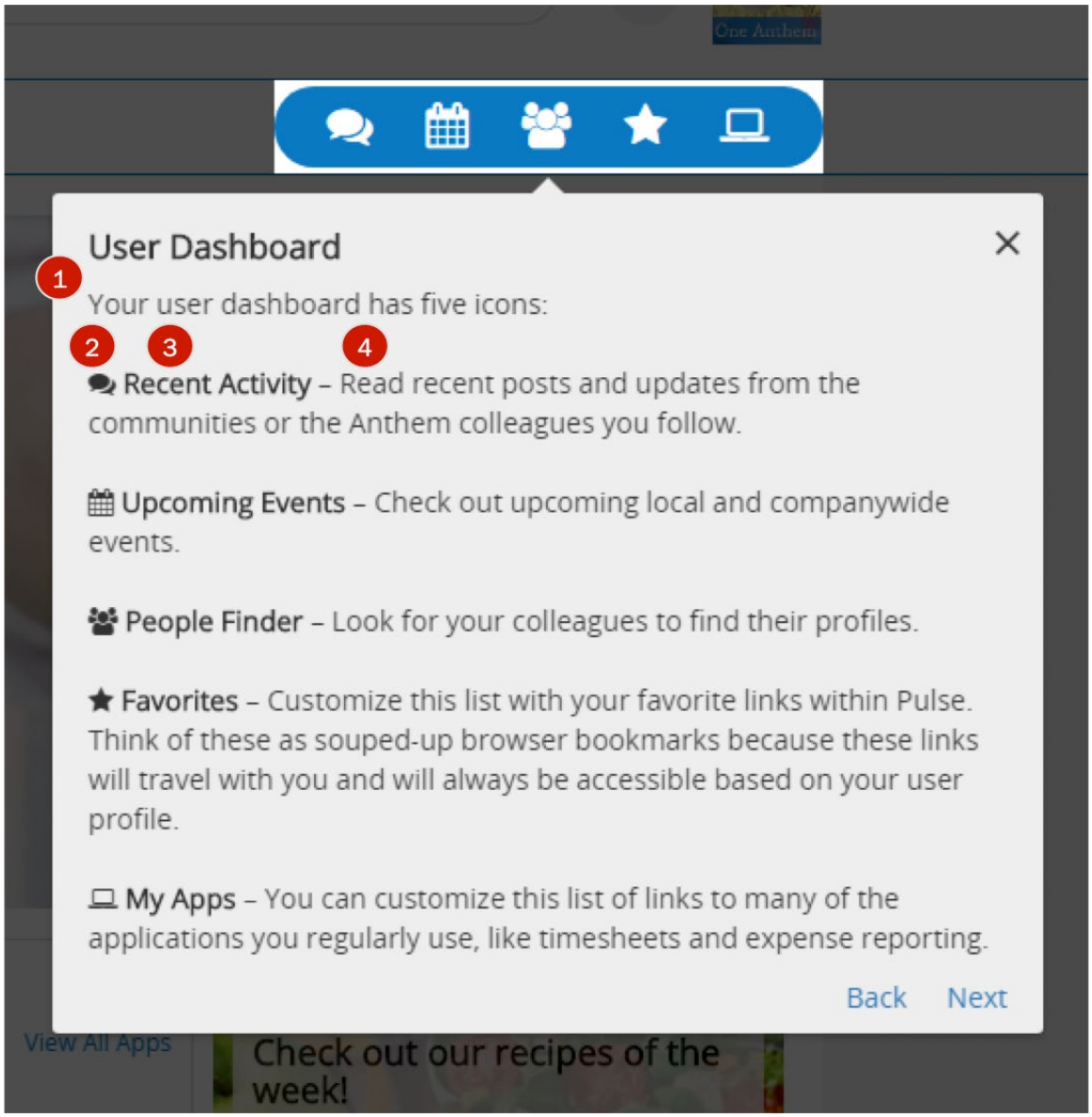
Pictured: Anthem Intranet Mobile Homepage. When viewed on mobile devices, homepage sections and the entire page layout changes orientation from horizontal to vertical.

Home, Mobile Highlights

Research revealed that few people would access the intranet from shared workstations and mobile devices, so the team took a desktop-first approach to designing Pulse, while also making it responsive. In doing this, the team focused on designing for Anthem-issued mobile devices and conducted research to identify the tasks employees would use most on mobile. Two of the top features that users mentioned were the people finder and organization charts.

1. **Logo:** The logo and tagline appears in the same place on mobile as it does on desktop.
2. **Utility navigation:** The stock price, alerts icon, and user's login image appear in the same area on mobile as they do on desktop (the upper right). The help feature is collapsed into a small blue button. The search field drops down a row and spans the screen's width, making it easier for users to tap, type, and see the query.
3. **Global navigation and dashboard icons:** The global navigation collapses into a hamburger menu on mobile, and the dashboard icon appears on the same row.
4. **Column drop and vertical layout:** The rest of the items on the homepage are prioritized vertically, utilizing the "column drop" responsive layout method on mobile. The carousel and some other sections change their orientation to a vertical layout on mobile to accommodate the smaller screen size. The footer links also change to a vertical layout.
5. **Accordion:** The news tabs that appear on desktop change to an accordion menu that users can expand and collapse to reveal the different news categories.

Dashboard Icons Wizard



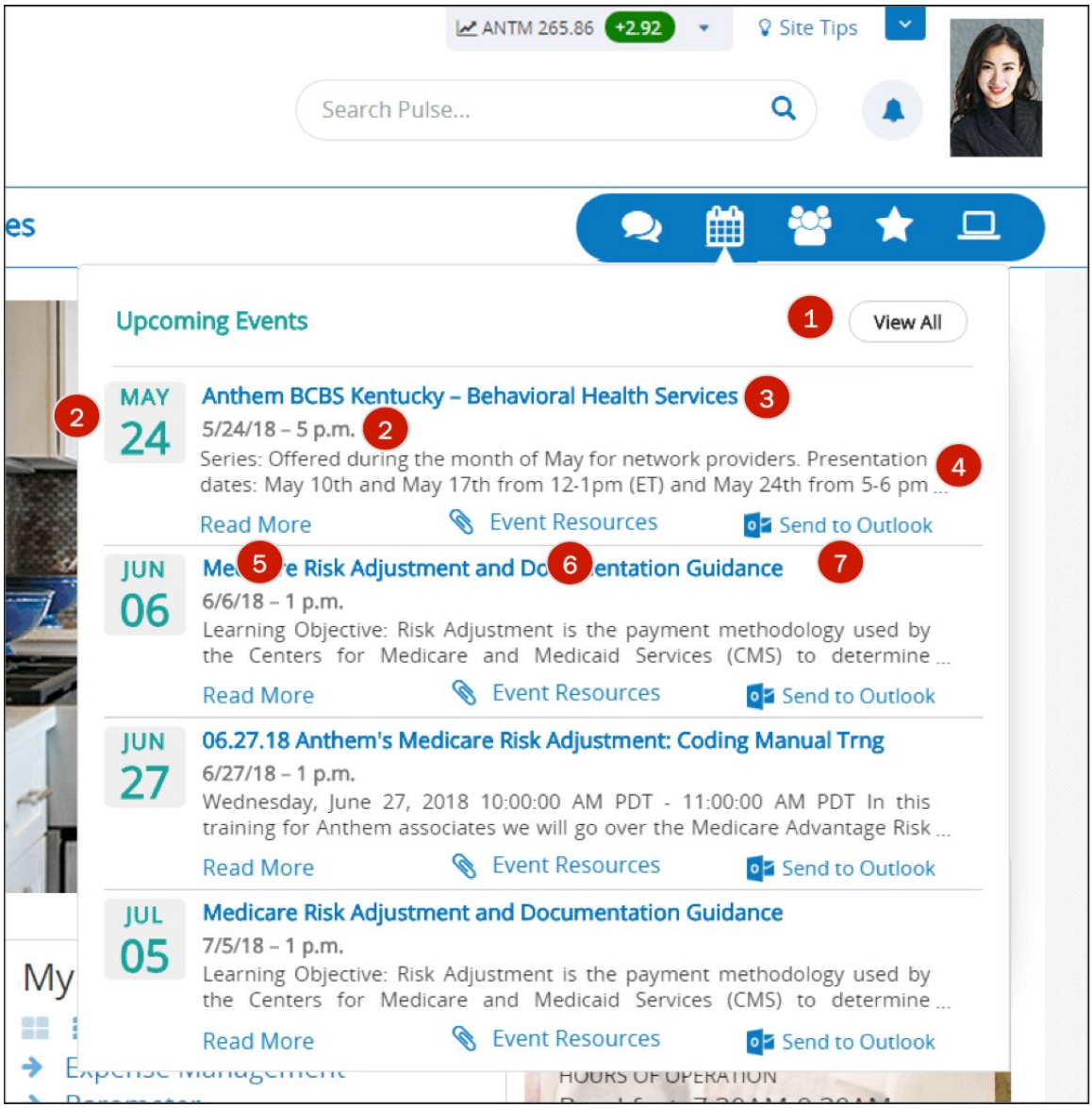
Pictured: Anthem Intranet Dashboard Icons Wizard. Clicking on the site tips wizard icon on most Pulse pages gives users helpful tutorial content, which is particularly useful for an expanding company that regularly adds new associates.

Dashboard Icons Wizard, Highlights

To ensure that employees understand the dashboard icons, the site tips wizard icon on most Pulse pages offers a helpful tutorial of content.

1. **Title:** The title and the short description below it indicates that the icons are related to the user's dashboard.
2. **Icon:** Each icon in the dashboard (icon toolbar) is repeated in the lightbox list, making it easy for users to match the icon to its description.
3. **Section name:** The name of each dashboard section appears next.
4. **Description:** A short description of each dashboard section follows its respective name, letting users know more specifically what they can do in their dashboard.

Dashboard, Events



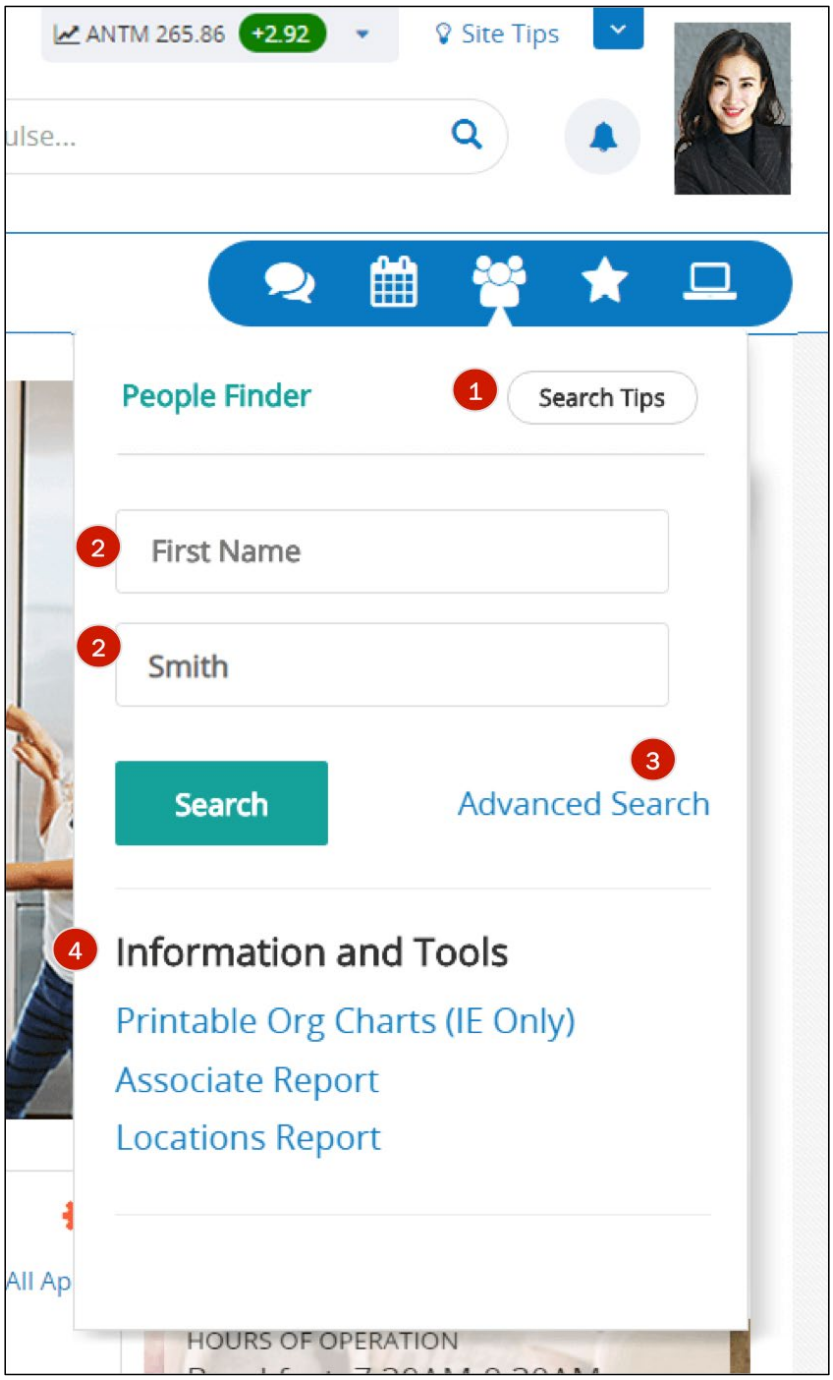
Pictured: Anthem Intranet Events Dashboard. Each users' events are listed in their dashboard calendar.

Dashboard Events, Highlights

Clicking the dashboard calendar icon opens a list of four *Upcoming Events*. All calendar entries are personalized to the user and most entries are created by a department, such as HR.

1. **View all events:** To see all of their events, users can click the *View All* button.
2. **Date and time:** Each event has a large calendar icon on the left, denoting the date. The date is again listed, along with the event time, below the title.
3. **Title:** The event's name appears in large blue letters.
4. **Description:** A short description lets employees know what the event is about.
5. **More information:** Users can click the *Read More* link to find additional details about the event.
6. **Event-related materials:** If the event has materials for attendees, users can access them via the *Event Resources* link.
7. **Add to calendar:** If users are interested in an event, they can add it to their Outlook calendar (the preferred personal calendar tool at Anthem). Clicking *Send to Outlook* creates an event entry in Outlook.

Dashboard, *People Finder*



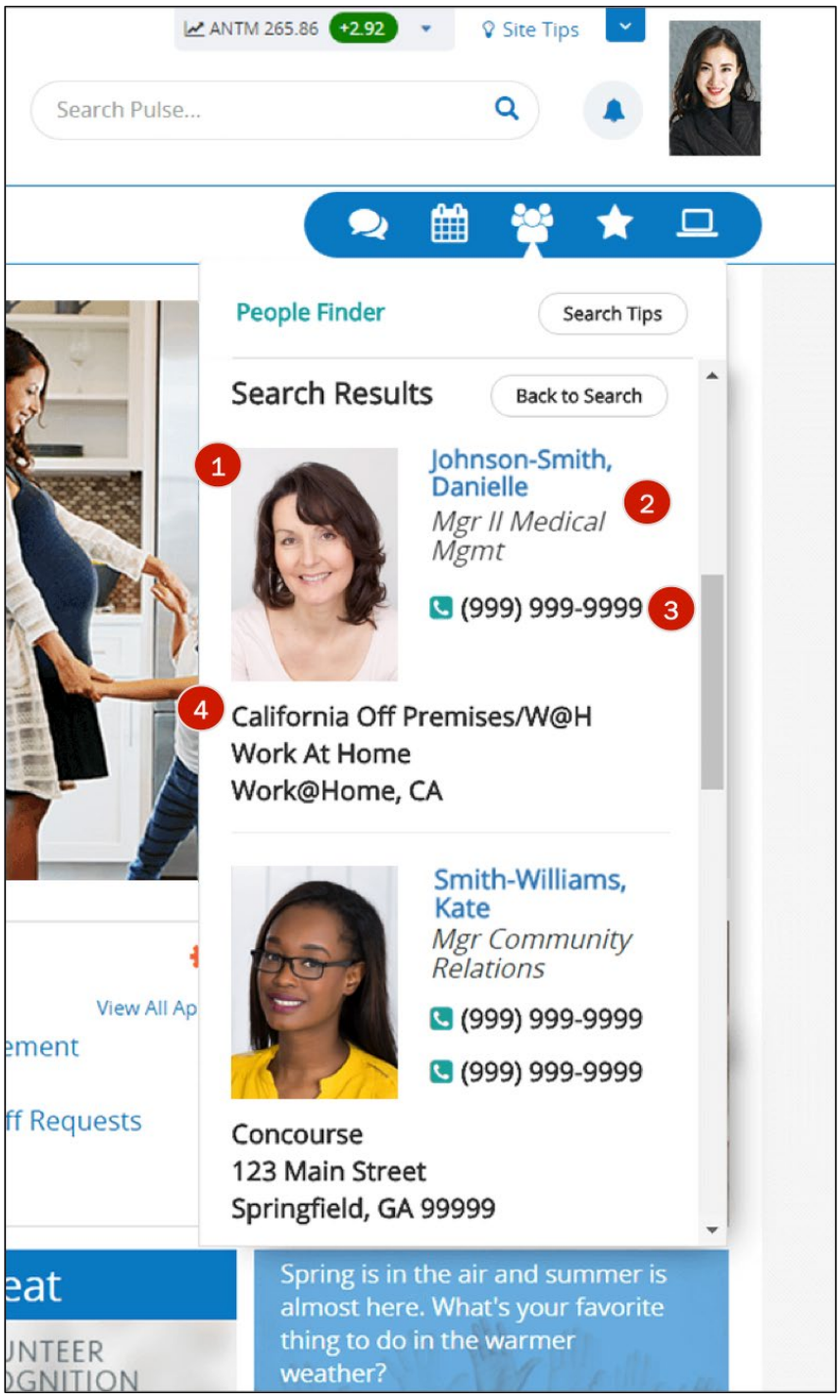
Pictured: Anthem Intranet *People Finder* Dashboard. The *People Finder* is a killer app that allows users to search for colleagues.

Dashboard *People Finder,* Highlights

Anthem employs more than 70,000 people, and they all have opportunities to be a resource for their colleagues—assuming their colleagues can find them. The *People Finder* makes this possible.

1. **Tips:** Users looking for help don't have to look far. The *Search Tips* button appears in the upper right of the *People Finder*.
2. **Search fields:** Users can search for colleagues by first name, last name, or both. This is a flexible option for people who don't know a coworker's full name. Users can also do a special character search by typing * at the beginning or end of a name if they are not sure of exact spelling.
3. **Advanced:** Users can search by criteria beyond the person's name when they access the *Advanced Search* features. Putting these less-common ways to search under a link makes the default search simple and approachable. Further, the label, *Advanced Search*, is easily understood, so people seeking more flexibility and power can easily find it.
4. **More resources:** Anthem has various resources—including org charts and locations—related to people. Links to a few of these appear at the bottom of the *People Finder*.

Dashboard, People Results



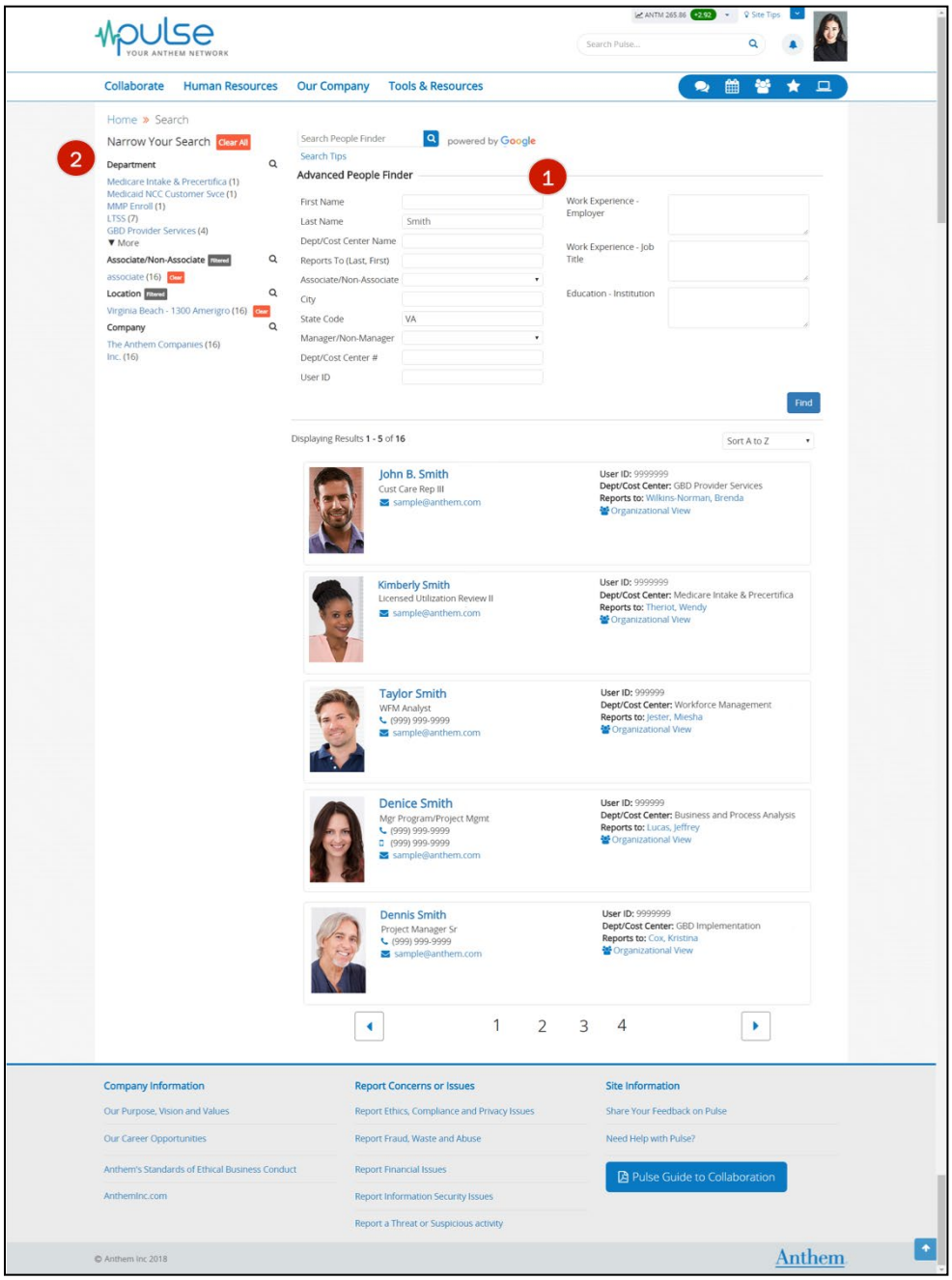
Pictured: Anthem Intranet People Search. This shows a search for people results in a scrollable list of rich results.

Dashboard People Results, Highlights

With just a few keystrokes and without having to leave the page, users can find the coworkers they are looking for. The immediacy of the search results' detailed information helps employees to proceed speedily.

1. **Photo:** The employee's photo appears first, giving the search results a human angle.
2. **Name and title:** The employee's name appears is blue text, which both makes it visible and indicates that it's a clickable link (which leads to the employee's profile page). Just below the name is the employee's job title, which clues colleagues in on the person's role at Anthem.
3. **Phone:** The employee's phone number appears next, making it easy for people to call each other right from the search results.
4. **Location:** The employee's office location appears below the photo, including for those who work from home.

Dashboard, Advanced People Search



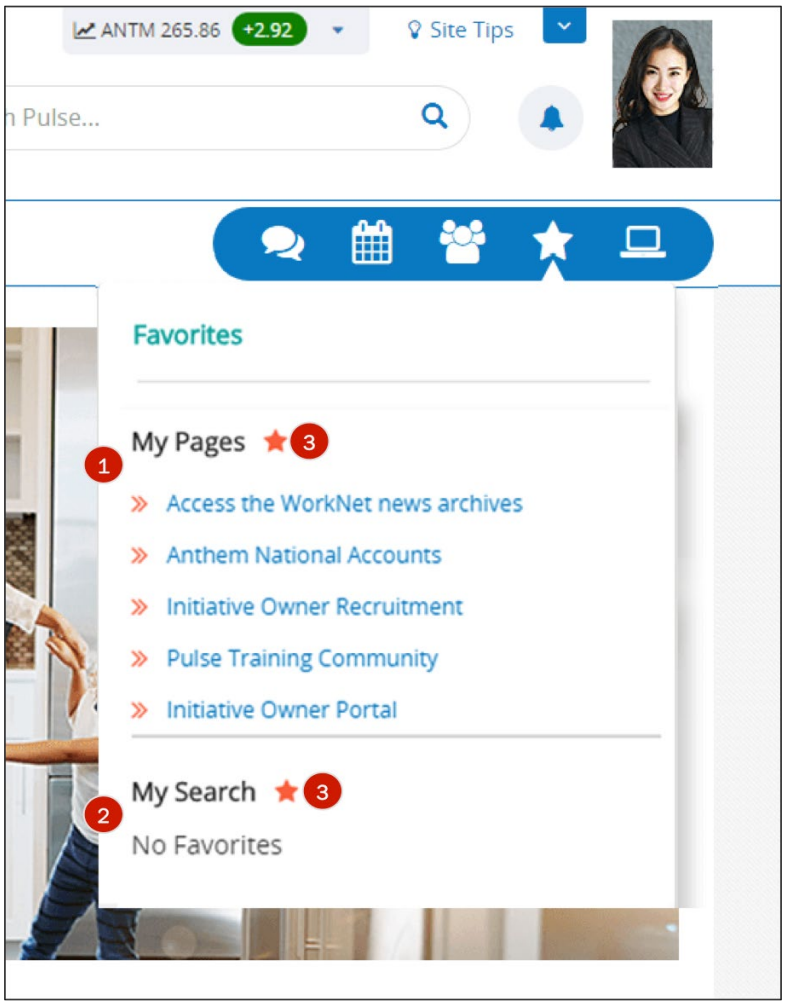
Pictured: Anthem Intranet Advanced People Search. Employees can search by detailed criteria using the *Advanced People Finder* function.

Dashboard Advanced People Search, Highlights

Employees can search for one another using a variety of fields and filters.

1. **Fields:** Users can search using any of the numerous fields related to pertinent employee information, including manager, city, and education.
2. **Filters:** Users can select from the suggested filters on the left to refine the results. To start fresh with filters, users simply click the orange *Clear All* button above the list of filters.

Dashboard, Favorites



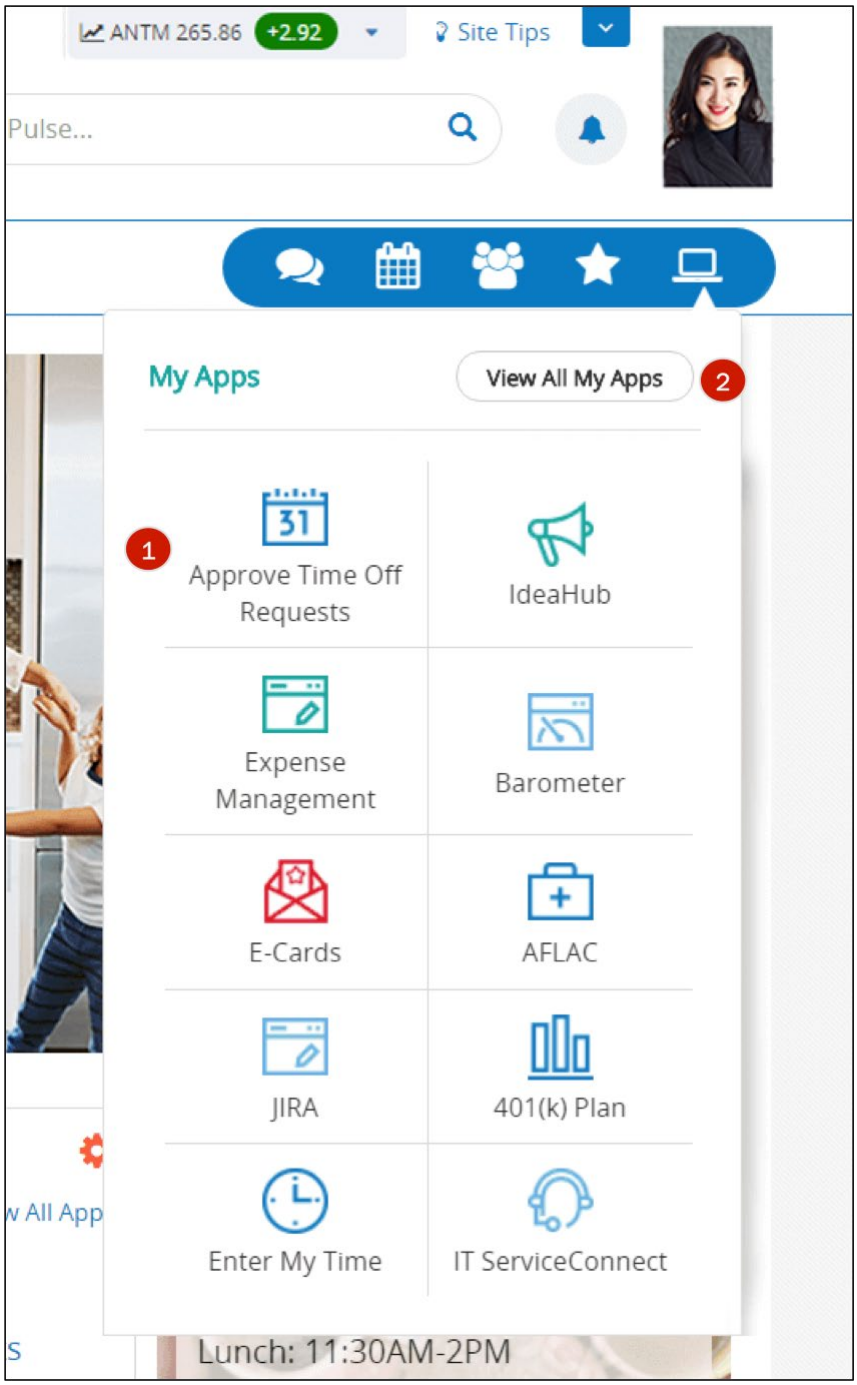
Pictured: Anthem Intranet Favorites Dashboard. Users can add bookmarks to any pages or search results pages on the site.

Dashboard Favorites, Highlights

Users can manage their favorites by clicking the orange star that appears on almost every page. They can quickly access the list of bookmarks via the favorites icon (a white star) in the dashboard. There is power to having the user's favorites accessible from any computer rather than tied to browser bookmarks.

1. **Links to pages:** The *My Pages* title at the top is informative and reminds the user of the type of favorites that appear. The links are in blue text, indicating that they are clickable.
2. **Links to saved searches:** The *My Search* section offers links to pages of search results that the user has saved. If users have not created any search query bookmarks, the status message *No Favorites* appears instead.
3. **Manage:** Users can add, remove, or reorder their favorites by clicking either of the orange star icons in the menu.

Dashboard, Applications



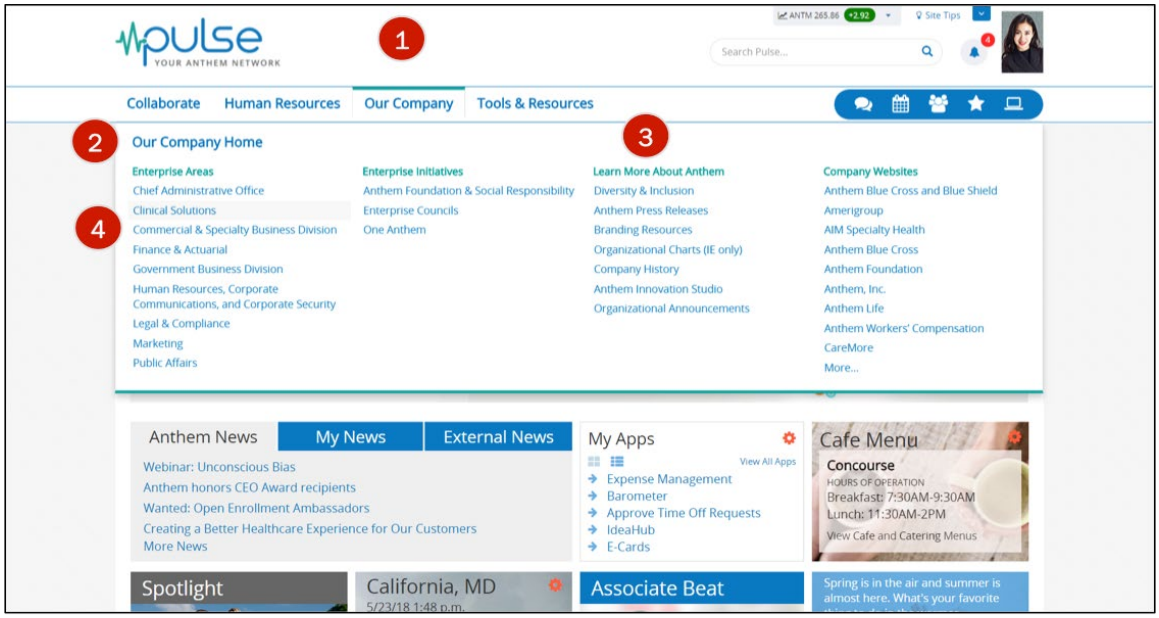
Pictured: Anthem Intranet Applications Dashboard. The dashboard's application icon opens a list of the logged-in user's applications.

Dashboard Applications, Highlights

Users can create a list of preferred applications that appears both in a section on the homepage and in a menu of links and icons that opens when users click the apps dashboard icon (a computer).

1. **Applications:** The name and a related icon for each application appear in the apps menu, giving users quick access to apps.
2. **Viewing options:** The *View All My Apps* button opens a page of all apps that the user is interested in; users can also add and remove apps on this page. The intranet supports approximately 130 applications. The most-used applications—including the HR dashboard, user profiles, and *People Finder*—are integrated into Pulse. Other applications are linked third-party apps that are still supported with the intranet's single-sign on.

Global Navigation





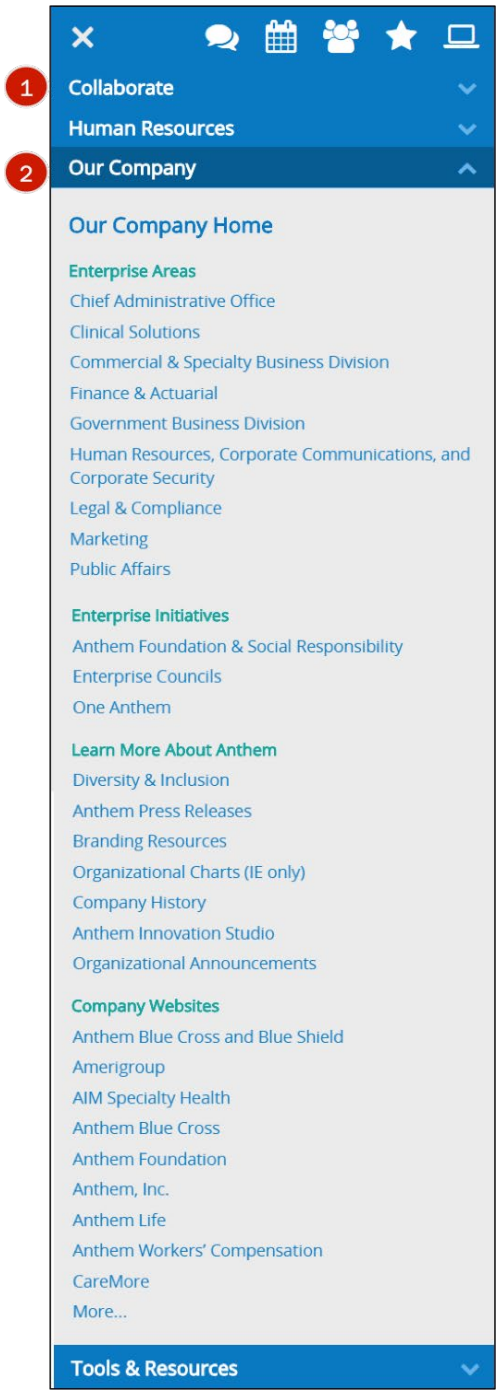
Pictured: Anthem Intranet Global Navigation. The megamenu makes it easy for users to scan all the options in each top-level category.

Global Navigation, Highlights

The megamenu uses subtle visual indicators to convey the hierarchy of choices.

1. **Current selection:** The currently selected top-level global navigation link looks selected because of the thick teal line above it and the subtle grey bars flanking the text label. The nonselected items have none of these traits, which clearly distinguishes the selected one.
2. **Link to section page:** When team members evaluated Pulse's content and IA (to inform the global navigation design), they determined that a section page for each intranet area would be helpful. The *Our Company Home* link repeats the intranet section's name, *Our Company,* signaling that the page describes that section. Another signal of that link's importance is its size and color: it is the same color as the text in the top-level global navigation menu, with just a slightly smaller font.
3. **Subheadings:** Subheadings make megamenus easy to deal with, as users can scan them to find the right section before they read the links. The label over each column of links describes the links in that column. The subheading's position and different text color (teal) and bolding indicates the subhead's place in the hierarchy, just below the section page link and above the page links.
4. **Links:** The blue links are legible and obviously clickable.
5. **Hover on links:** When users hover the cursor over a link, a subtle grey background appears.

Global Navigation, Mobile



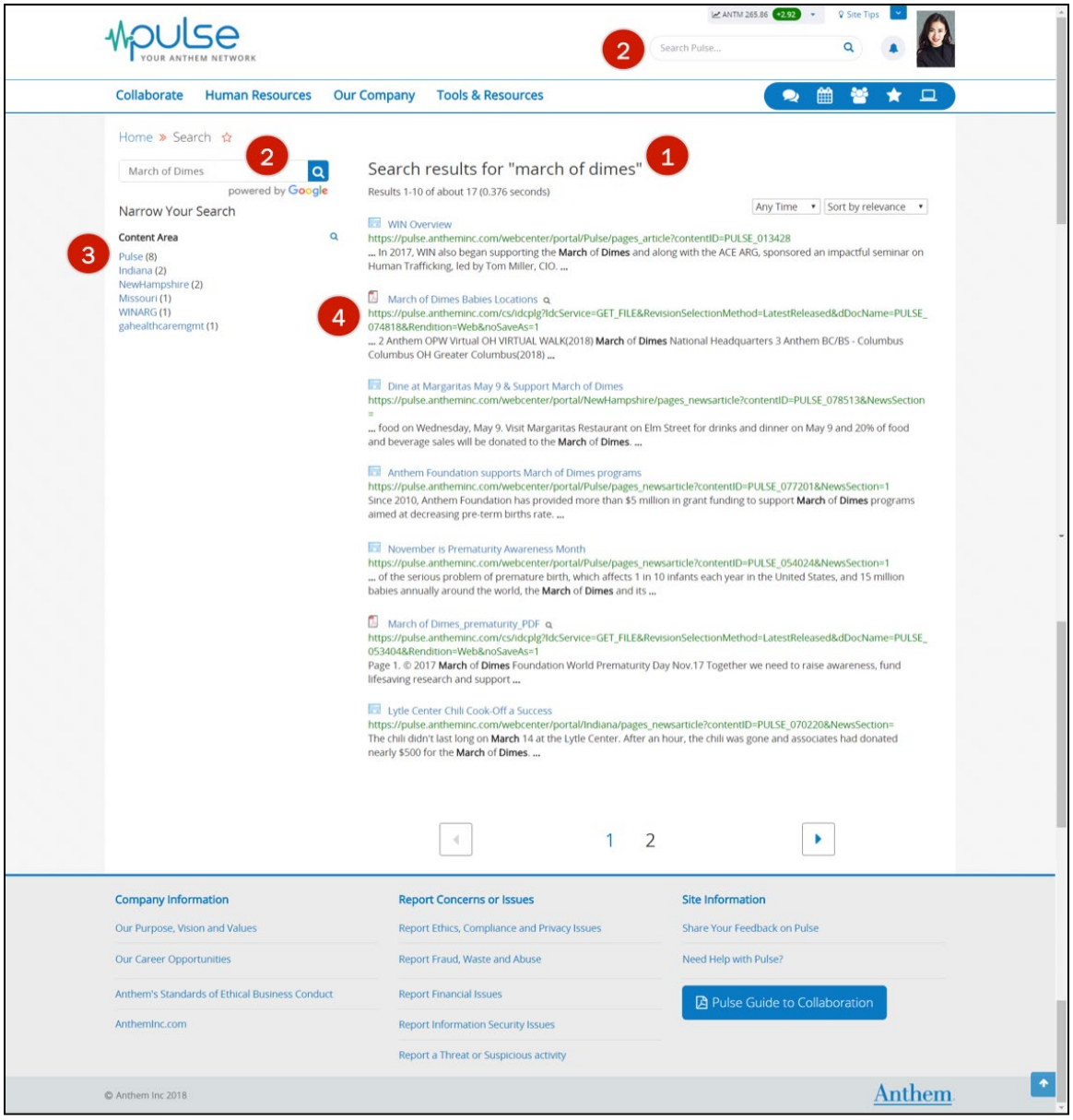
Pictured: Anthem Intranet Mobile Global Navigation. The global navigation appears in a mobile-friendly way on phones.

Global Navigation, Mobile Highlights

Megamenus typically don't display in a usable way on mobile phones, so the Pulse designers opted for an accordion menu.

1. **Collapsed menu:** The menus that are not selected appear collapsed; they have a consistent look, including bold white text, a dark blue background, and a carat icon pointing down (signaling that, if clicked, it will expand the menu).
2. **Expanded menu:** The selected menu is expanded. The top-level label has a darker blue background than the deselected menus. The carat points up (signaling that, if clicked, it will collapse the menu). The menu items are stacked vertically and have subheadings for easy scanning.

Search



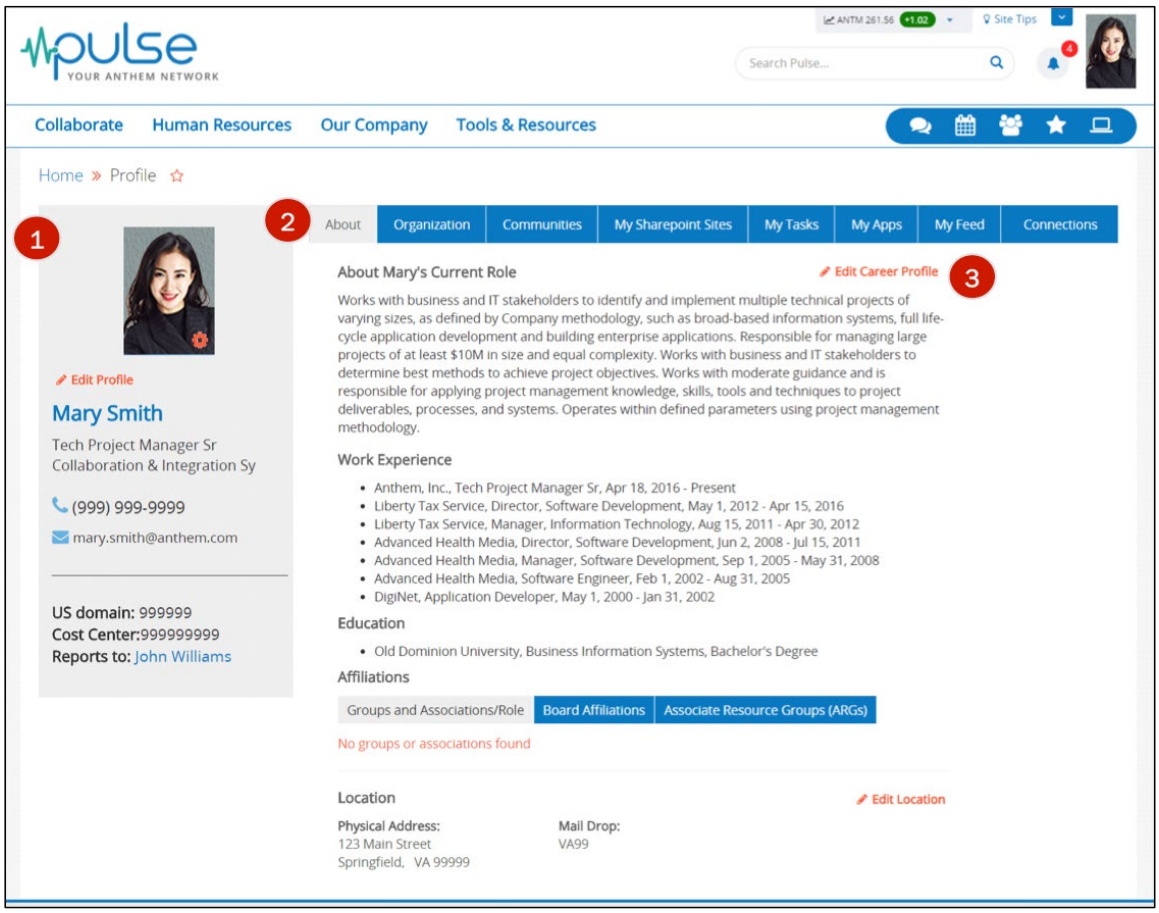
Pictured: Anthem Intranet Search. A slightly tweaked out-of-box solution powers the Pulse site search.

Search, Highlights

The SERP includes the user's query, the search results, and options for filtering the results.

1. **Query:** Repeating the query helps users search again if needed.
2. **Fields:** Users can search again from either of two search fields on the SERP.
3. **Filters:** Clicking links in the set of filters on the left refines the results.
4. **Results:** The results include a large amount of pertinent information to help users decide if they have the results they need and which results might be most helpful. Each result includes: an icon showing its medium, the title, the URL, and a short selection of content from the page or file.

Employee Profile



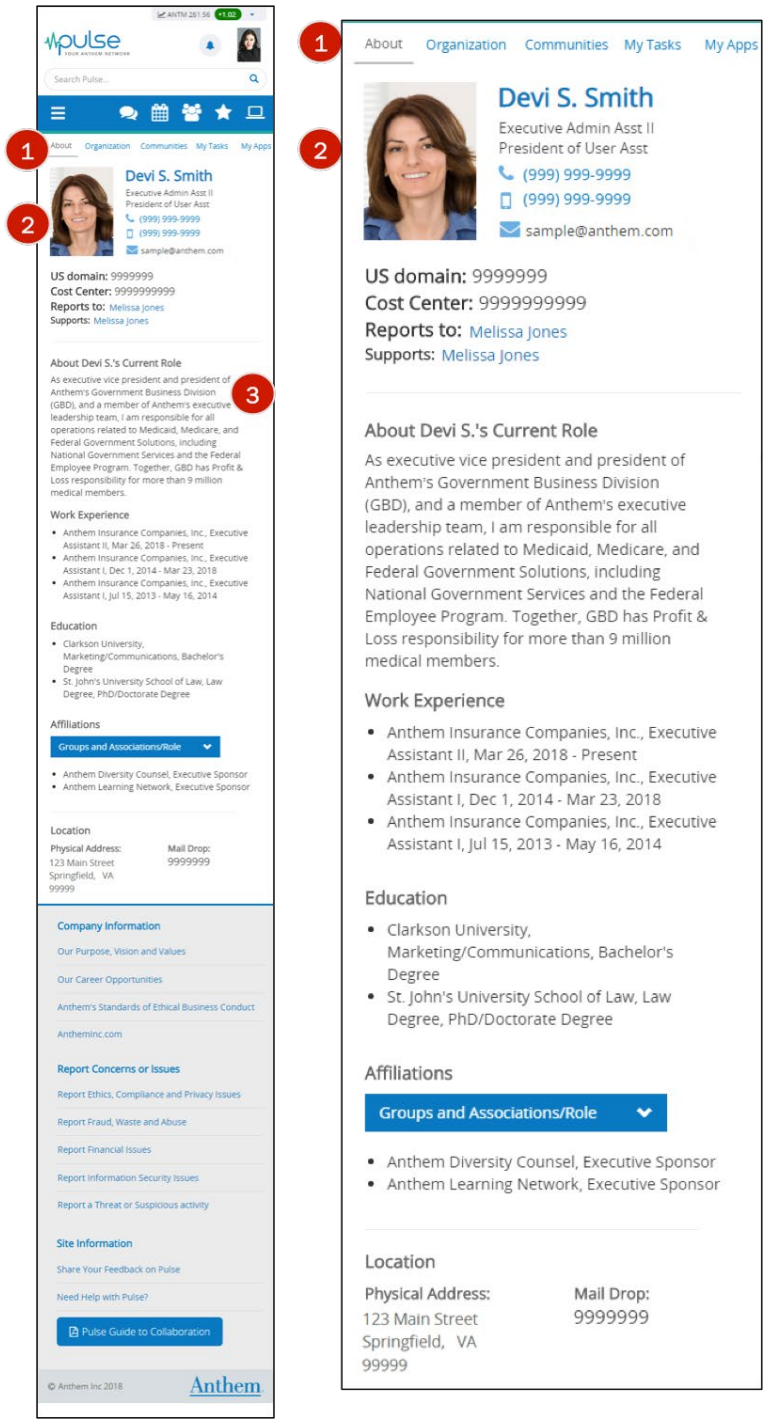
Pictured: Anthem Intranet Employee Profile. Employee profile documents on Pulse include basic contact information and much more.

Employee Profile Highlights

A huge amount of information—some from HR systems and some that the users provide—is housed in the employee profile documents.

1. **Key information:** A grey section on the left includes the employee's photo, name, job, contact information, cost center, and manger. In many cases, the information in the grey box is all a user needs to move forward.
2. **Tabbed sections:** The eight tabs across the top lead to employee-related content, including the person's communities, tasks, and apps.
3. **Edit:** Users are encouraged to write various profile sections, and they can edit these sections at any time by clicking the red *edit* links.

Employee Profile, Mobile



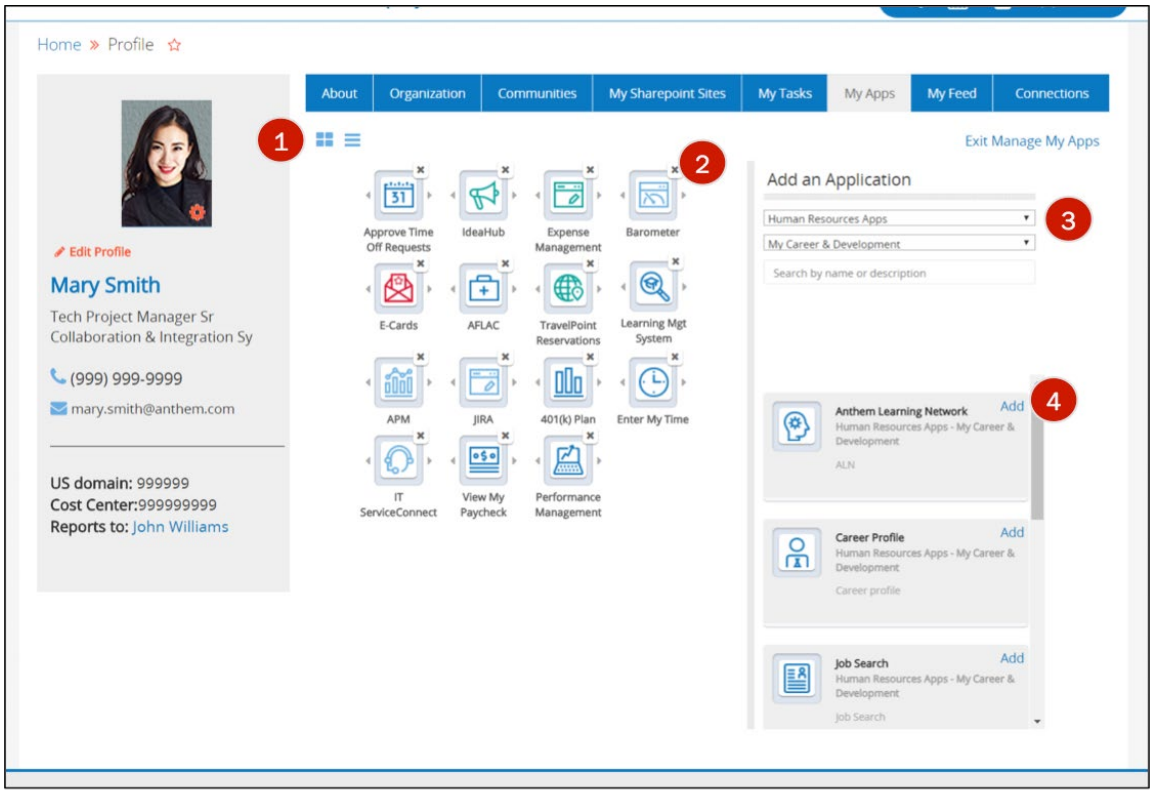
Pictured: Anthem Intranet Mobile Employee Profile. When using a mobile device, employees can access all the information in employee profile documents.

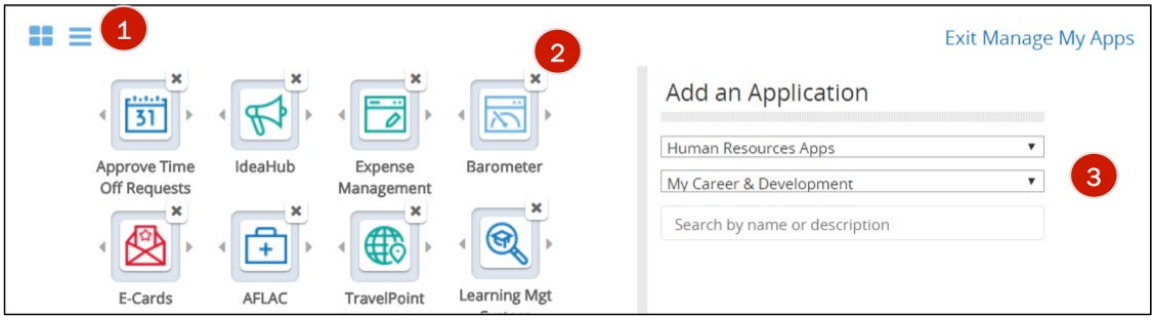
Employee Profile, Mobile Highlights

The same thorough information that appears in the employee profile document on desktop also appears on mobile, but is formatted for mobile consumption.

1. **Navigation links:** The tabs are present, but their look is simplified to . On mobile they appear more like horizontal navigation links.
2. **Key information:** The designers omitted the gray background here to increase both page load times and the contrast between the text and background (making the text easier to read).
3. **Narrow column:** The text column width is greatly reduced, making text easier to read.

Employee Profile, *My Apps*



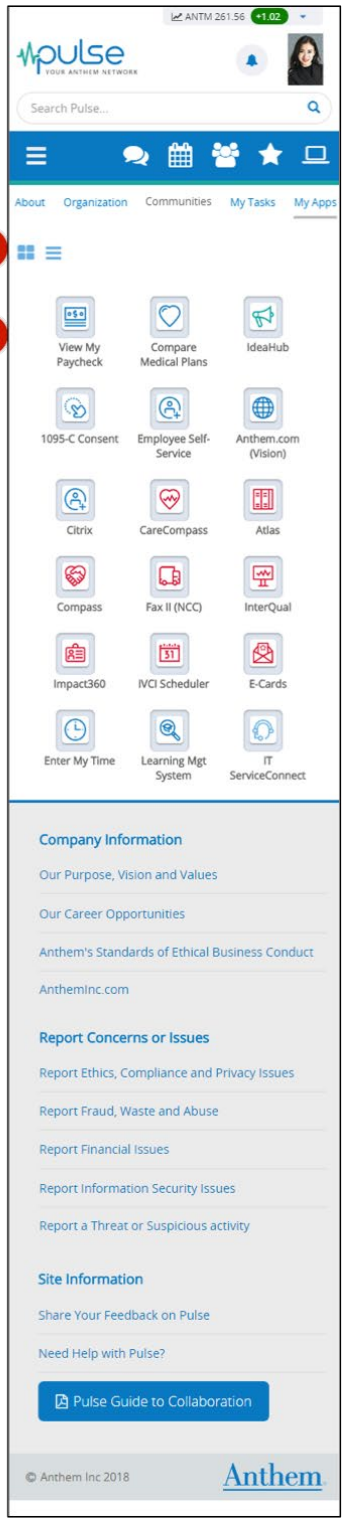


Pictured: Anthem Intranet Employee Profile *My Apps*. Users manage their applications list in the *My Apps* section of their profile document.

Employee Profile *My Apps, Highlights*

The Pulse team's single sign-on lets the intranet offer users seamless access to many apps; they can organize the ones they use most in the *My Apps* section of their profile page.

1. **Views:** Icons offer a way to view the set of applications as either a list or as icons.
2. **Delete:** Users can delete any application by clicking the x icon on the app icon. To prevent accidental deleting, a confirmation asks if they meant to delete the application.
3. **Find applications:** To find applications, users can select from drop-down lists to see applications related to topics, or search in the open search field.
4. **Add:** When users locate an application they want in their set, they simply click the blue *Add* link. This adds the application to the set on the left.



Employee Profile *My Apps*, Mobile

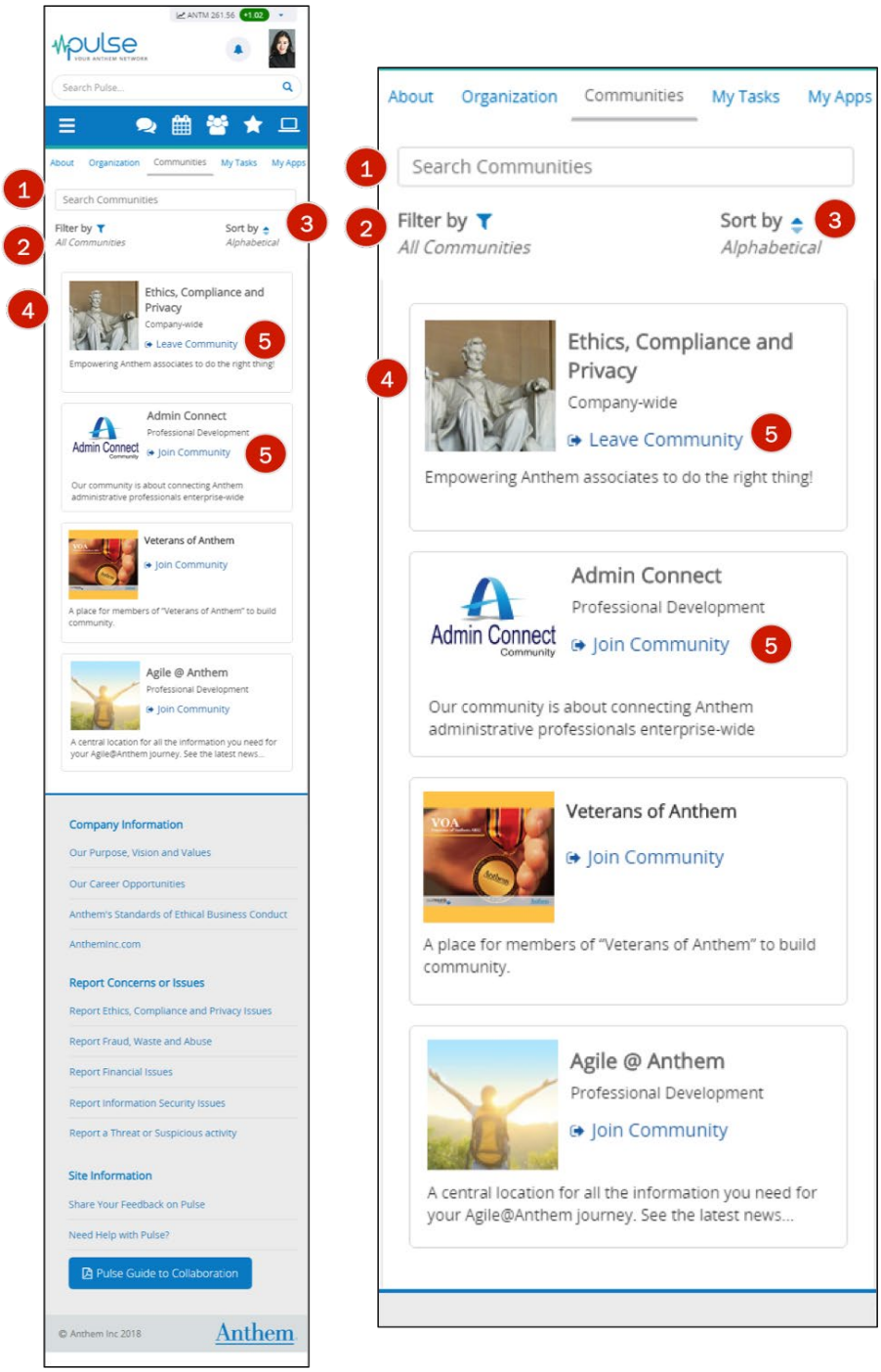
Pictured: Anthem Intranet *My Apps* Mobile.
Users can view their apps list on mobile.

Employee Profile *My Apps*, Mobile Highlights

Although users cannot yet edit apps on mobile, they can access their list of apps.

1. **Views:** Users can view their applications set in a list or as icons.
2. **Application icons:** Each icon has a text label, making it easy to identify, and the icons are a large enough to make them easy to tab.

Employee Profile *Communities*, Mobile



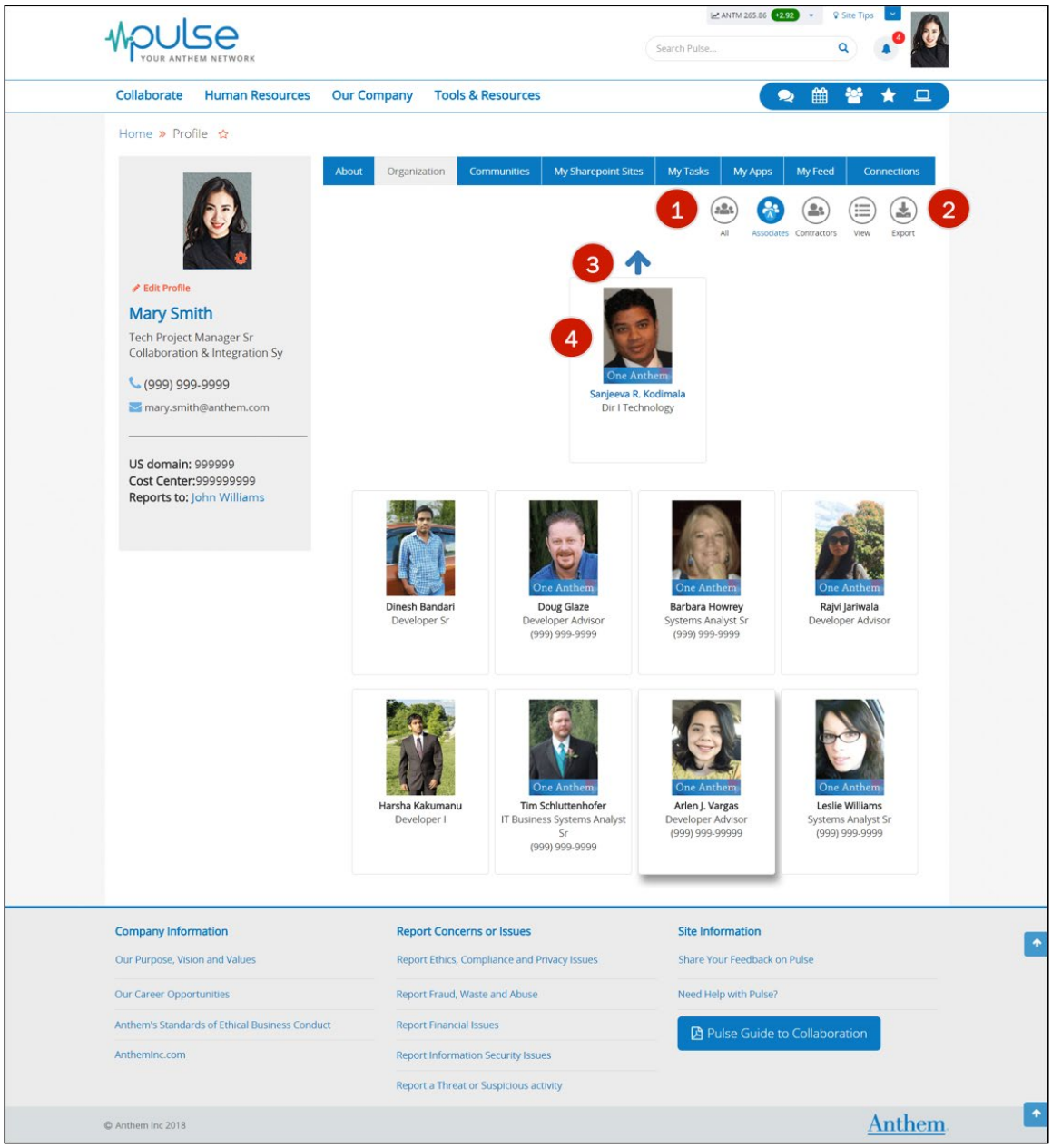
Pictured: Anthem Intranet Employee Profile *Communities*, Mobile View.
Communities can help employees collaborate and engage with one another.

Employee Profile *Communities*, Mobile Highlights

Communities offer employees a way to collaborate online, about any project, topic, or initiative they want. Community owners work to keep the content current and relevant, which can be a challenge.

1. **Search:** If users know the topic or the name of a community, they can search for it using the special communities search feature.
2. **Filter:** A drop-down of filters lets users refine the list of communities using certain keywords.
3. **Sort:** Users can sort the list.
4. **Information:** Each community card displays the name of the community, its category (such as *Company-wide* or *Professional Development*), and a one-sentence description. An image adds a touch of flair and sometimes more information as well.
5. **Join or leave:** A blue link in each community's card urges users to either join or leave the community. If they are not yet a member, the link label is: *Join Community*; if they are already a member, the link label is: *Leave Community.* These links make it easy for users to keep their list of communities current.

Employee Profile Organization Chart



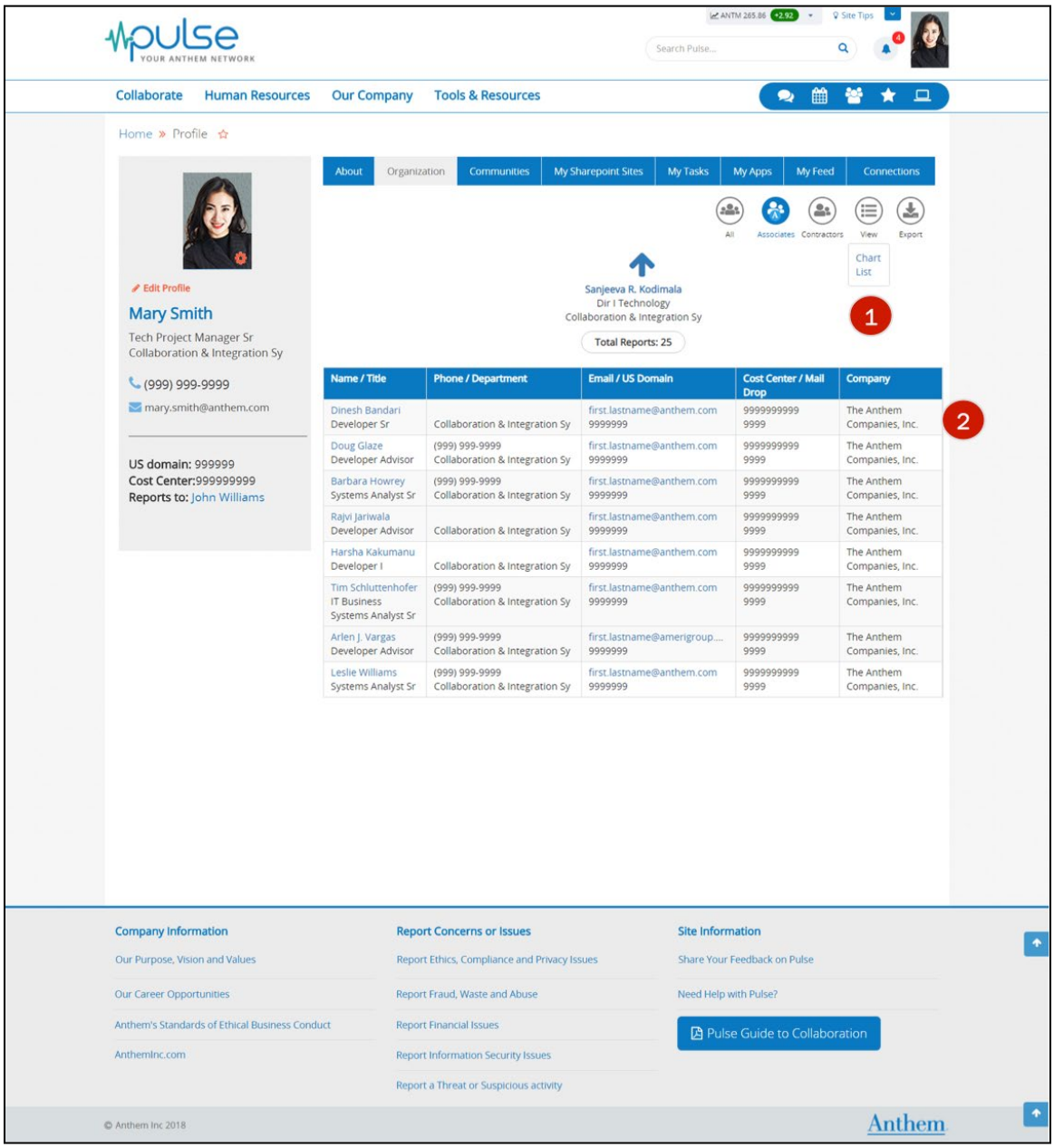
Pictured: Anthem Intranet Employee Profile Organization Chart.
Organization charts are a key feature on Pulse.

Employee Profile Organization Chart, Highlights

Larger organizations such as Anthem, which has more than 70,000 employees and contractors, often benefit from having a usable org chart feature on the intranet. Pulse's org chart functionality gives employees the lay of the land of the organization and its structure.

1. **Views:** The icons in the upper right of the org chart let users see *All* people who work at Anthem, only *Associates* (people who work for Anthem), and *Contractors.* A *View* icon lets users see the org chart as a list or in the more traditional hierarchical format complete with photos, names, and job titles. People who are more visual and want to see a small set of employees benefit from this level, while users who want to see more at once can benefit from the list view.
2. **Export:** Users can export the org chart so they can store or print it. This can help in many situations, including when planning projects, working with a new team, or looking at a reorg. Some people like to print their own section of the org chart in a team-building exercise.
3. **Up and down levels:** Clicking the blue up arrow icon at the top of the visible section of the org chart displays the chart's next highest level, while the down arrow at the bottom of the chart displays the next level down.
4. **Employee cards:** Users can click on any employee to see his or her profile document.

Employee Profile Organization Chart, List View

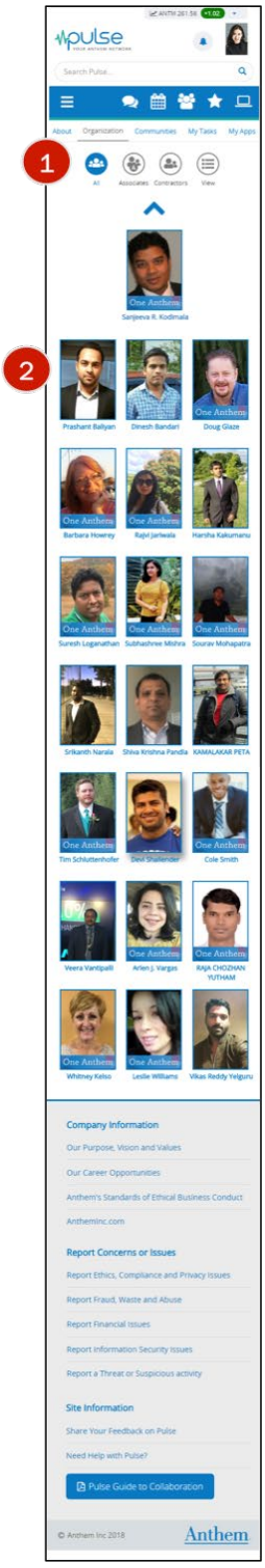


Pictured: Anthem Intranet Employee Profile Organization Chart, List View. The org chart can be displayed as a list on Pulse.

Employee Profile Organization Chart, List View, Highlights

The list view organizes the org chart into a table; while it shows more information about each employee, photos are omitted.

1. **Views:** The *Chart List* icon enables users to see the org chart in the more traditional hierarchical format.
2. **Employee rows:** Users can click on an employee name to see his or her profile document. Much of the pertinent information, however, is already displayed in the org chart table.



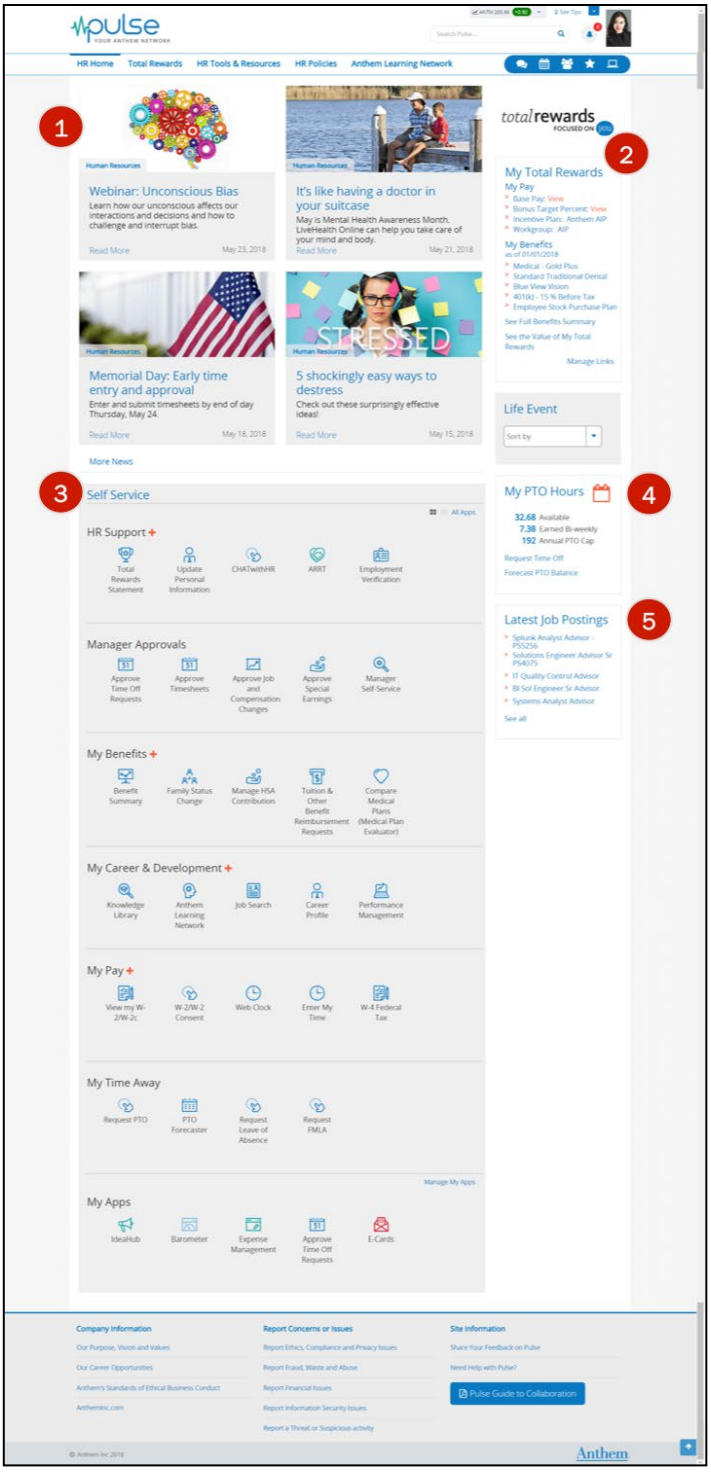
Employee Profile Organization Chart, Mobile

Pictured: Anthem Intranet Mobile Org Chart. It's easy to use the org chart features on mobile, too.

Employee Profile Organization Chart, Mobile Highlights

The representation of the org chart features on mobile is similar to that on desktop, but everything is shrunk to fit the small screen and the export feature is omitted.

1. **View icons:** The icons on mobile are like those on desktop, but their position shifts left so that they appear in the top center. The icons are large enough to see and tap on mobile.
2. **Employee cards:** Due to space constraints, the org chart cards display a little less information about each employee on mobile, but users can click on an employee card to see the profile.



Human Resources

Pictured: Anthem Intranet Human Resources. Employees can have all of their HR needs fulfilled on Pulse's vigorous HR section.

Human Resources, Highlights

Pulse's HR section provides a highly comprehensive set of information, tools, and self-serve tasks. Most importantly, it consolidates HR resources in one place—a place that is one of the most visited on the intranet.

Announcements (such as a special deadline for timesheets) and webinars on topics related to employee welfare (such as unconscious bias) increase employee awareness of the many services and options available to them. HR features also help employees take control of their benefits and use them to their best advantage, which contributes to keeping employees happy. The HR section's design makes accessing HR information easy, which takes stress off the HR department employees.

1. **Promoted content and news:** At the top of the HR homepage, four large sections showcase promoted HR initiatives and news. Information featured here includes topics such as how to tend to one's mental health using online tools and how to eliminate stress. This section demonstrates that the organization cares and wants to cultivate employees and help keep them healthy. Employees who want to read more HR-related news can click the *More News* link at the bottom of this section.
2. **Benefits and pay:** The *My Total Rewards* section in the right rail is no area to be ignored. It includes links to the user's personal pay and benefits information. To remind users about all of their benefits and the benefits' value, this information is consolidated and accessible via the *See Full Benefits Summary* and the *See the Value of My Total Rewards* links at the bottom of this section. *Manage Links,* at the very end, allows users to customize the set of links that appear in *My Total Rewards*.
3. **HR dashboard:** Much of the HR page real estate is reserved for the grey *Self Service* section below the HR news. Each section houses links and icons related to important HR activities and tools—offering pretty much anything an employee might need from HR. Among the topics are personal information, timesheets, family status change, training, performance management, job search, time-off request, and management-related tools. Each section has a subtitle indicating what it's about, which makes the page easy to scan. The consistent visual layout—spacing and a grey line between each row, and five or four icons per row—make the page easy for users to scan and use.
4. **Time off:** In addition to its inclusion in the dashboard, paid time-off information appears in the right rail. The *PTO* section helps users manage their time off, helping them plan so that they can recharge both their brain and body. It displays how much paid time off employees have accumulated, how much they earn every two weeks, and the caps placed on the amount they can earn per year. The *Request Time Off* and *PTO Balance* links help users take action related to time off.
5. **Job listings:** The *Latest Job Postings* section shows Anthem's five most recent jobs openings and a link to *See all.* Employees are often the best recruiters for jobs, so this is a smart section to show in the HR area. Also, good employees who want a new challenge can throw their hats in the ring.

Tools



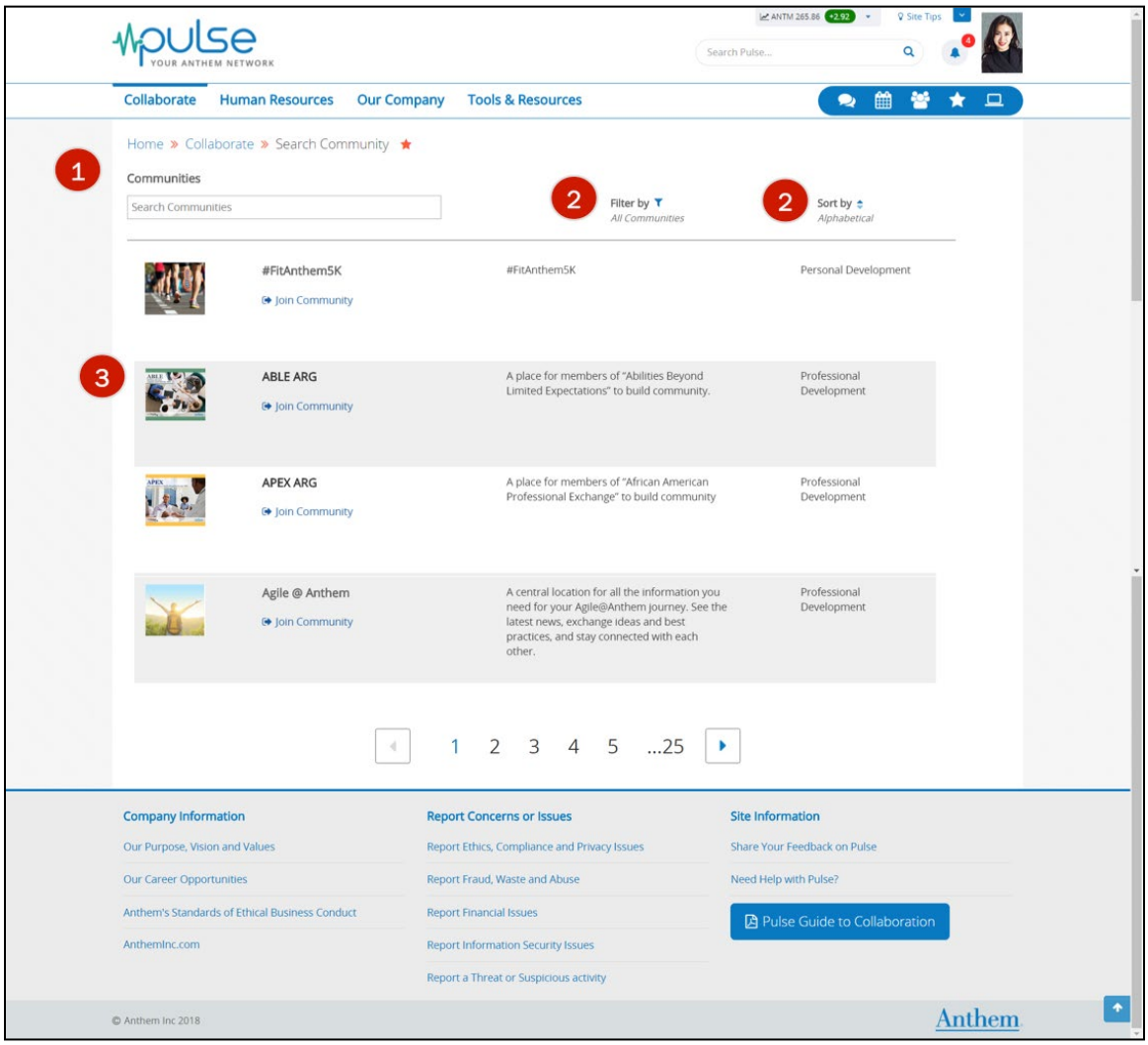
Pictured: Anthem Intranet Tools. *Tools & Resources* for Anthem's wide variety of job roles are consolidated in one section of the Pulse intranet.

Tools, Highlights

HR isn't the only department that provides resources for Anthem employees. IT, purchasing, security, facilities, PR, and legal are a few of the groups that often work with or counsel Anthem's many employees. Pulse's *Tools & Resources* section helps increase employee awareness about what they need to do. It also consolidates many of the tools that employees with diverse jobs need—from brand standard guides for communications professionals to medical policies for nurse case managers—so there is no need for users to hunt around to complete common tasks.

1. **Breadcrumb:** The breadcrumb at the top displays where users are in the IA and also acts as the page title. This, combined with the selected global navigation menu (which has a thin blue bar above it to distinguish it from unselected menus), acts as an anchor to tell users where they are in the UI.
2. **Promoted content:** Two news items or internet initiative promotions appear at the top of the *Tools & Resources* page. The *More Tools & Resources News* link below leads to additional news items.
3. **Popular tools:** Links to the most popular tools are consolidated in the *Top Tools* section in the right rail.
4. **Policies:** The most important Anthem policies, which all employees should be aware of, are listed in the *Our Policies* section.
5. **Issues:** Employees are encouraged to report issues that need attention—from ethics to fraud to finance. Links to some areas to report potential issues appear in the *Report an Issue or Contact* section in the right rail. This section lets employees know that it's okay for them to report something they feel is not right. Having links on Pulse takes away the stigma of reporting an issue, legitimizes the process, and provides further information about how to identify issues and what to do.
6. **Tabbed section:** The familiar blue in-page tab UI, seen on several Pulse pages, presents various tool and resource categories. The links—*Information Technology, Human Resources, Purchasing & Expenses, Facilities & Security, Brand/Comms/PR,* and *Legal/Ethics & Compliance*—cover the gamut of topics for which employees need tools and resources.
7. **Links:** Each tabbed section offers a comprehensive set of links related to the main topic. While lists may be long, hunting in a list is far faster and easier than hunting across a large organization.

Community Search



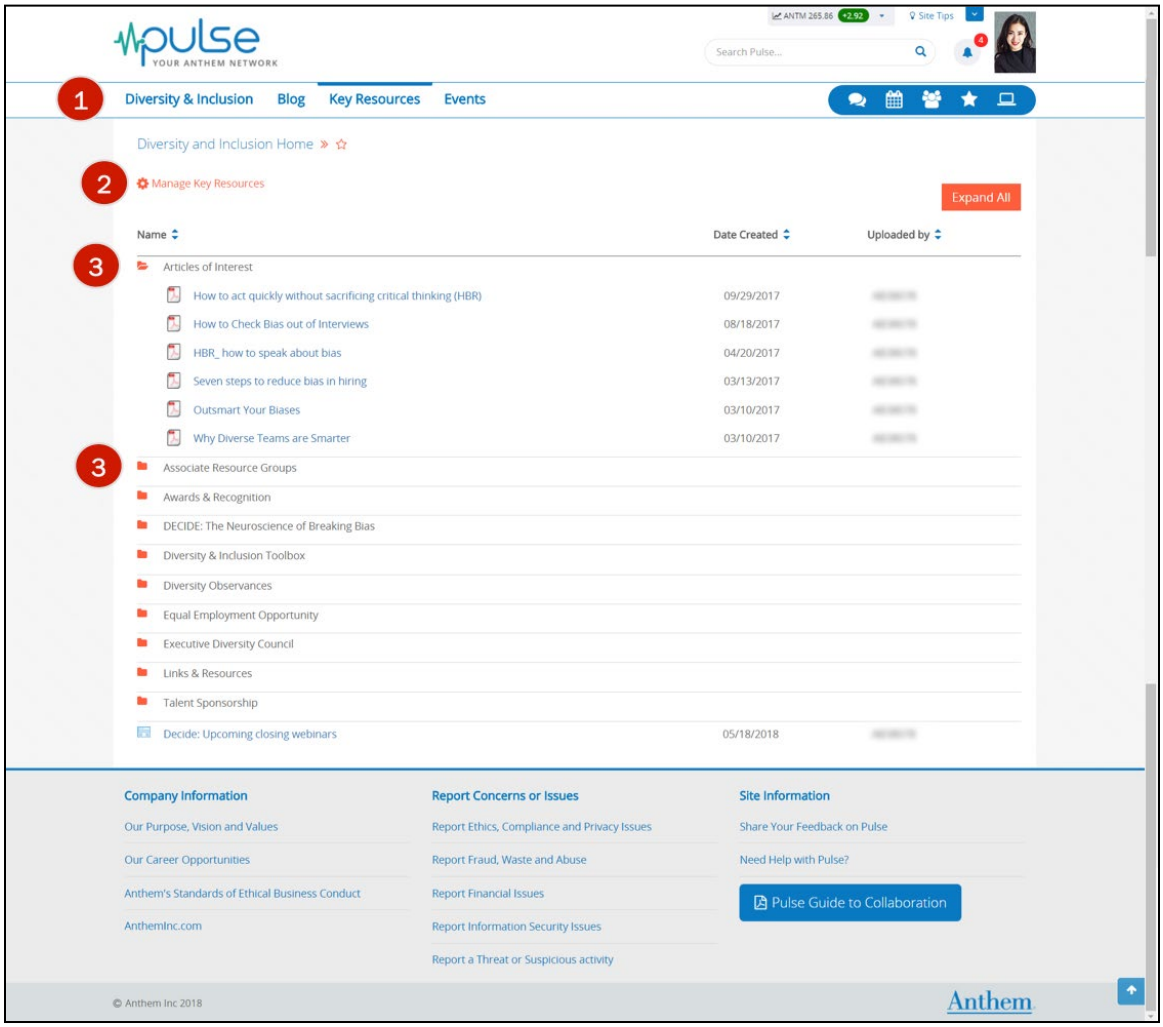
Pictured: Anthem Intranet Community Search. Users can search for any topic to see if a related community exists.

Community Search, Highlights

The community search feature makes it possible for people to find communities they need or are interested in. It's also a helpful safeguard against duplicate communities, as potential new community owners can search to ensure there is not already a community like the one they plan to create.

1. **Page name:** Users can find the community search feature in the intranet's *Collaborate* section. The *Communities* page name helps remind users that they are searching specifically for communities and nothing else.
2. **Filter and sort:** The filter and sort features in the upper right come in handy when the search returns many community results related to the user's query.
3. **Result:** Each result displays the community name, the option to *join the community* right from the SERP, information about the community, and the category it falls under. This information can help users determine whether a community is right for them.

Community, Resources



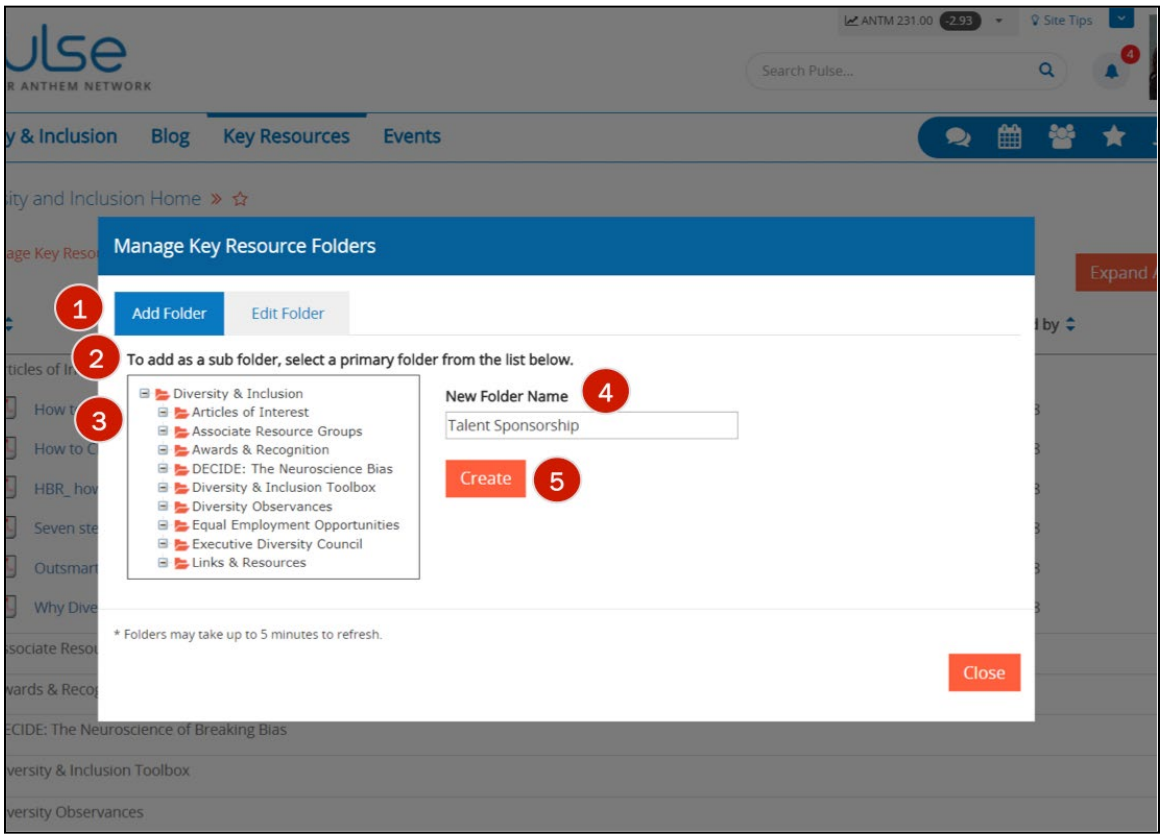
Pictured: Anthem Intranet Community Resources. Communities each have a section in which owners can post resources for members.

Community Resources, Highlights

Pulse lets employees set up communities for projects and initiatives. Each community has a section where owners can post resources so that members can easily locate them. These resource sections are popular; in fact, many of the 22,000 pieces of content on Pulse are these key resources.

1. **Navigation:** The navigation menu in each community includes the main page (usually the community name), a *Blog, Key Resources,* and *Events*.
2. **Manage resources:** On the *Key Resources* page, community managers can add, remove, and categorize the resources in folders. Managers can access these features via the orange *Manage Key Resources* link at the top of the page.
3. **Folders:** Resources appear in folders, which can be expanded (to show the list of items in them) or collapsed (to hide them).

Manage Community Resources



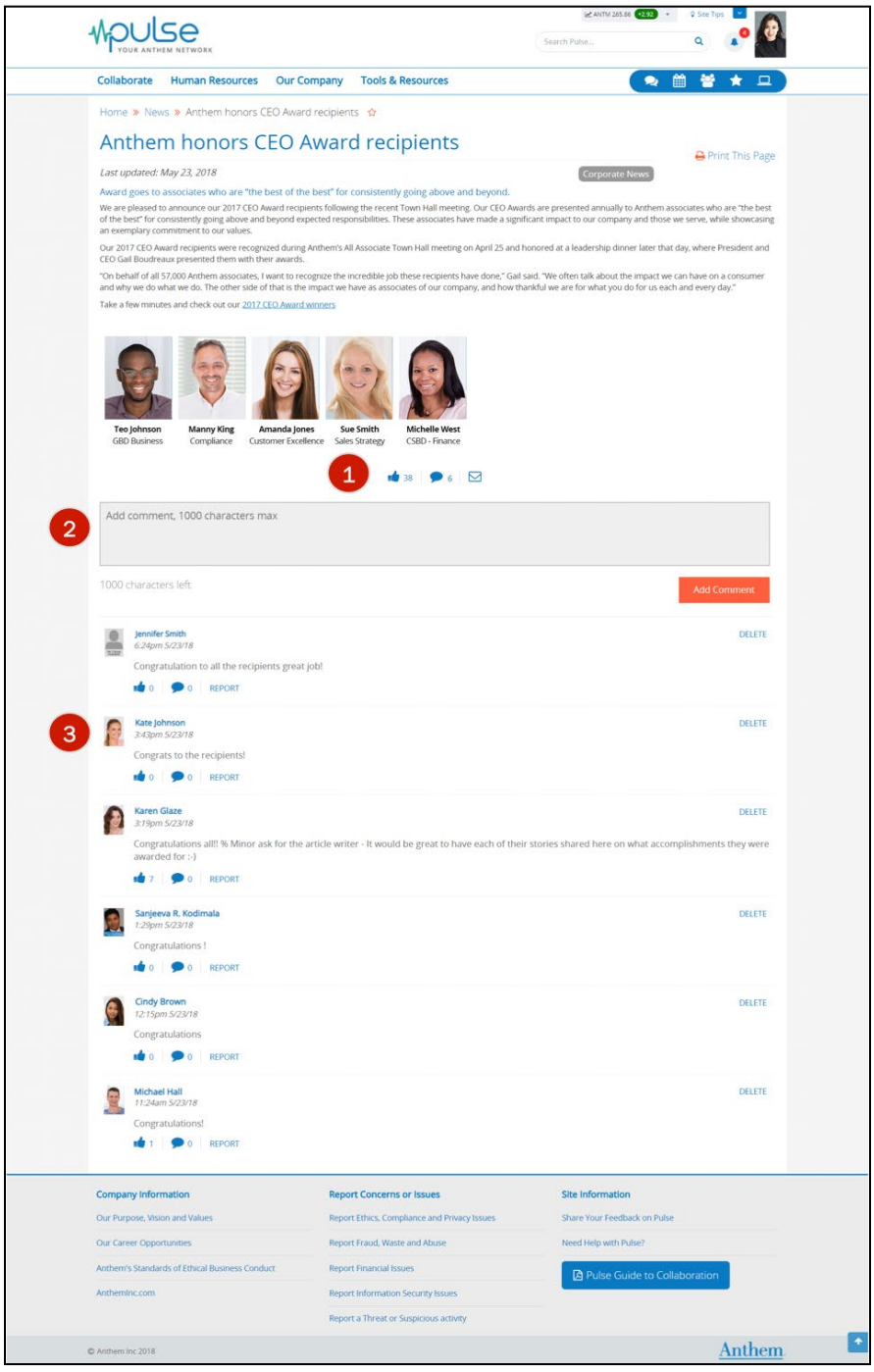
Pictured: Anthem Intranet Community Resources. Simple commands in the lightbox allow community owners to manage key resources on the Anthem intranet.

Manage Community Resources, Highlights

Community owners can edit folders in a simple UI.

1. **Tabs:** Familiar blue tabs offer to *Add Folder* or *Edit Folder.*
2. **Instructions:** A sentence communicates how to add folders and position them as desired.
3. **Folder display:** All the current folders show in a list, making it easy for users to see the types of resources already created.
4. **Field:** The *New Folder Name* label makes it easy for users to know what to type.
5. **Create:** The orange *Create* button is visible and obvious.

Comment



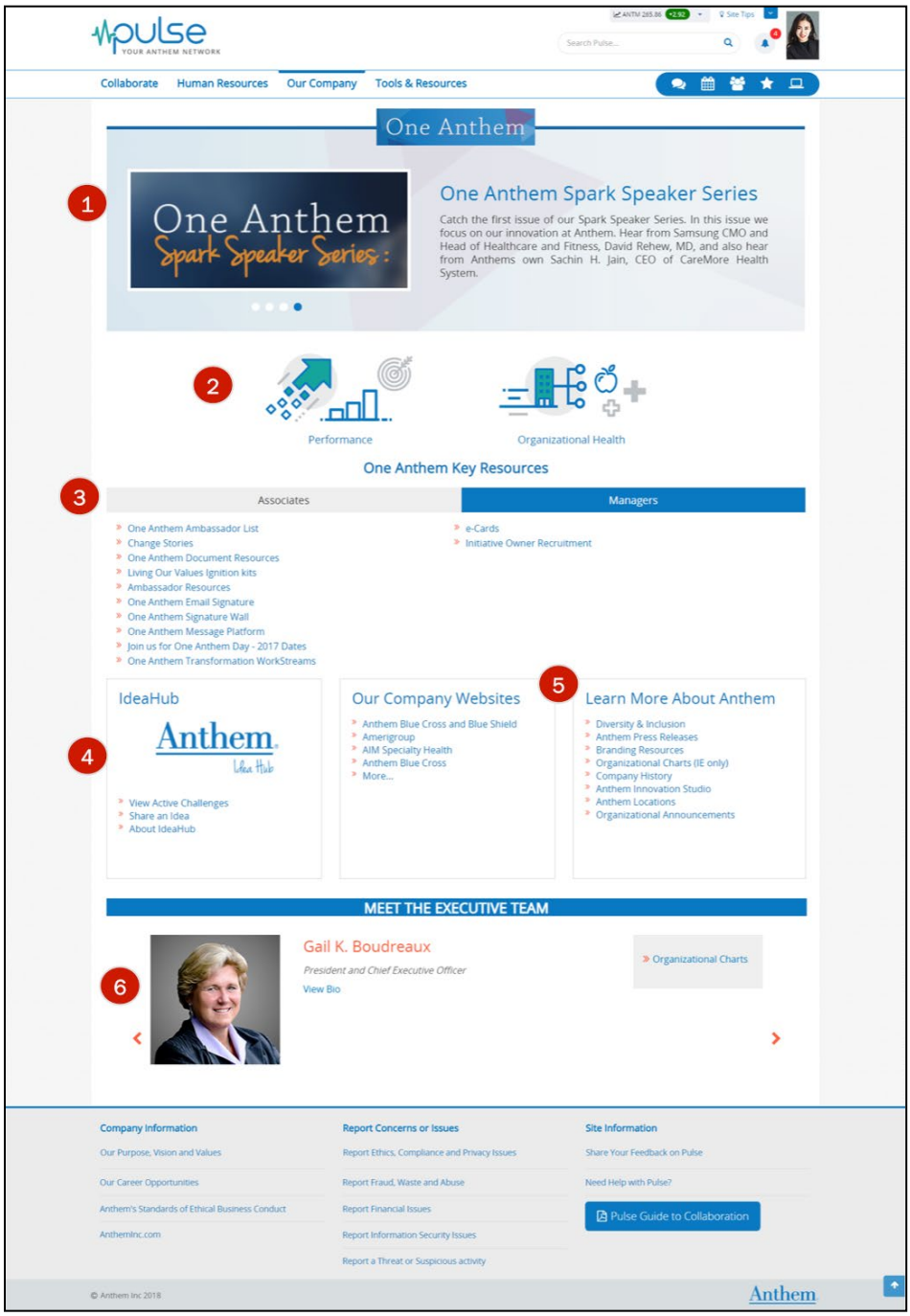
Pictured: Anthem Intranet Comment Function. Employees can like and comment on news.

Comment, Highlights

Communities are not the only collaboration option. Employees can like and comment on news items via a simple commenting UI.

1. **Comments and likes:** The current number of comments and likes is indicated just below the article.
2. **Field:** A comment field below the article invites employees to engage with the content.
3. **Comments:** Seeing other people and their comments can be interesting for employees to read. Comments also inspire people to join in and comment themselves.

Company Page



Pictured: Anthem Intranet Company Page. The company page houses key information about the organization.

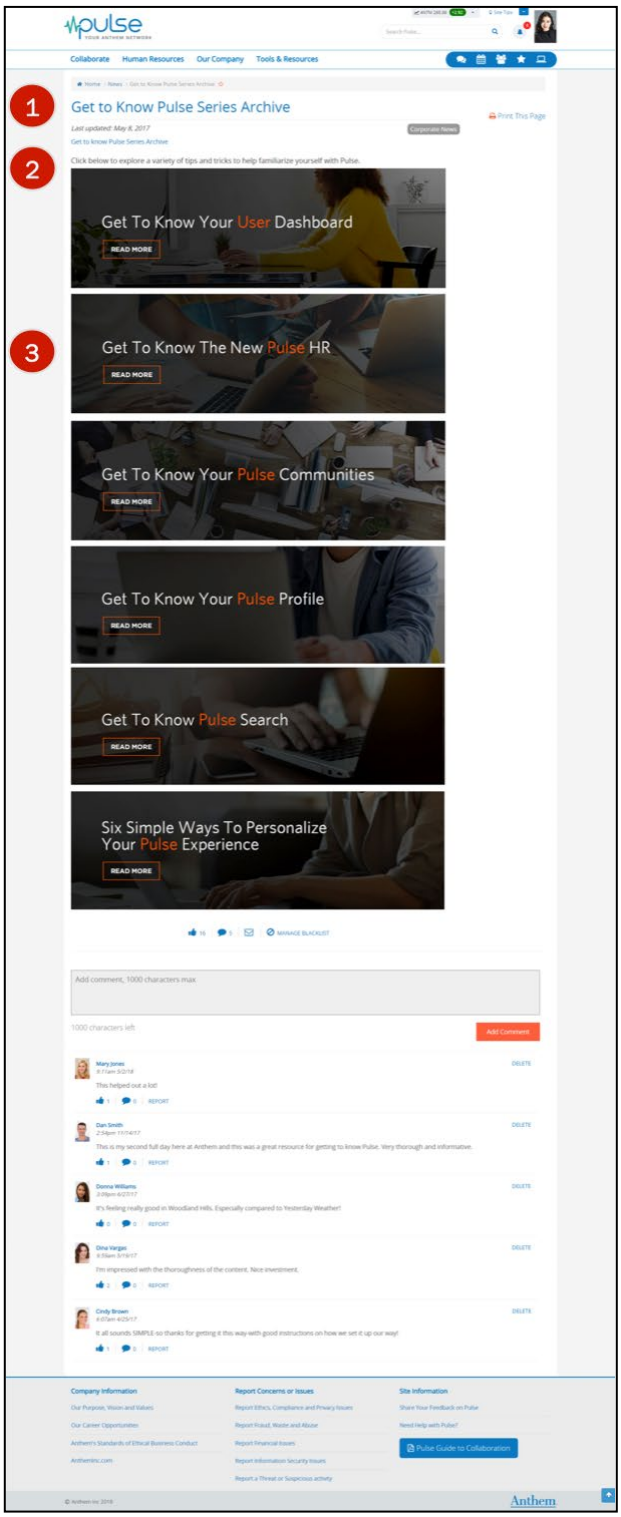
Company Page, Highlights

One might assume that employees should just know about the organization at which they work, but many don't know as much as they could or should. Intranets are a

great way for employees to learn more and be reminded about how their organization works and how well it is doing. Anthem is forthcoming in providing company information to employees. The Pulse *One Anthem* page offers myriad information about the company that employees can easily peruse.

1. **Promoted content and initiatives:** The top of the *One Anthem* page promotes a business initiate—such as a speaker series with experts in various business topics.
2. **Company performance and health:** Executives share information about how the company is doing in terms of *Performance* and *Organizational Health.* This type of information helps employees set their priorities and better understand business decisions that are being made. Sharing this type of information with employees helps them feel informed, respected, and valued.
3. **Tabbed section:** The familiar blue in-page tabs in the *One Anthem Key* Resources section show links to sections for *Associates* (employees) or *Managers* and lists cool initiatives and need-to-know processes. The *e-Cards* feature allows employees to send each other thank you and congratulatory cards.
4. **Ideas:** The *IdeaHub* card offers links to a program that inspires employees to suggest new ideas. This is a great way to let employees stretch their creativity, and for managers to find out about poor processes and possible solutions.
5. **More Anthem information:** The next two cards on the page share links to company websites and more information about the company, including its history and locations.
6. **Executives:** The *Meet the Executive Team* section at the bottom of the page displays the president and CEO's name and photo, as well as a link to her bio. Orange arrows let employees scroll through to other executives, while the *Organizational Charts* button leads to the full org charts. This area is a great way for employees to get acquainted with the people who captain the ship that is Anthem.

Help and Promoting Intranet Features



Pictured: Anthem Intranet Help. The *Get to Know* Pulse series offers tips and tricks for optimal Anthem intranet use.

Help and Promoting Intranet Features, Highlights

Sometimes the best way to make users aware that features exist is to tell them. The *Get to Know Pulse* series does just that. These articles give tips and help related to the Anthem intranet's many features.

1. **Archive:** All the articles about Pulse are consolidated in the intranet's *Get to Know Pulse Series Archive* section.
2. **Instruction:** One simple sentence encapsulates why these articles are helpful and what the user should do.
3. **Titles:** The titles in each large card indicate the feature that the module describes.

DESIGN PROCESS AND USABILITY WORK

Let UX Lead the Charge

Iterative wireframe sessions and feedback from several focus groups conducted at the start of the redesign project informed decisions about Pulse's feature roadmap. The wireframe design brought together key stakeholders from the site's different areas and helped speed up specification gathering. This process worked well, reducing weeks' worth of business analysis into an average of two sessions, in which the team identified and approved features that would meet the needs of each area. To maximize session productivity, the team's UX lead took loosely documented requirements and designed wireframes to represent the interface structure of each feature using Balsamiq Mockups. This approach helped stakeholders provide feedback during each iterative review and revise session. These mockups ultimately morphed into polished schematics that were applied to the site design. Almost every element of Pulse went through this process; this let the design be driven by those who specialize in UX rather than by committee, and resulted in a clean look and easy-to-use features.

The biggest insight that emerged from the research activities was that the design must be intuitive for people to use. Industry best practice research showed this as a common thread among successful intranets. The team also worked hard to ensure that the site was not over-engineered. It took the most important tasks, prioritized them, and then prioritized them again throughout the design process. This is a practice that the team still uses today, as the site continues to be refined.

Getting Buy-In

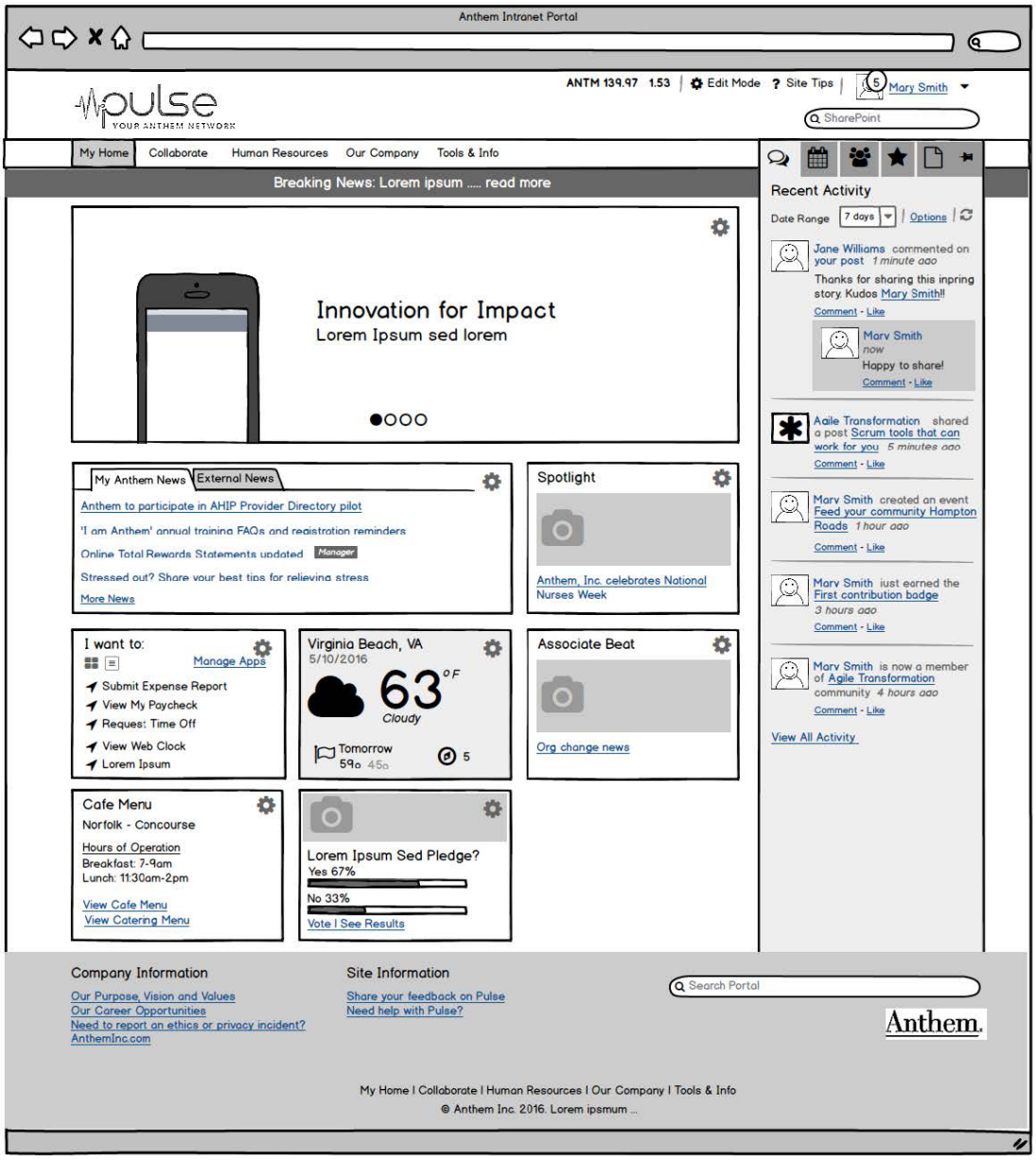
Change management was a focus throughout the Pulse creation process. To ensure the project would be a success, the Pulse team formed a Change Management Workstream early on that met regularly. Key milestones and touch points were identified up front, and these helped guide the project and keep it on track. Because people had been using the old platform for so long, the team knew there might be adoption—or even acceptance—issues. To combat this, the team kept the site intuitive and simple, and also developed a series of communications that were delivered to users pre- and post-launch.

Because associates were eager to experience Pulse and the team didn't want to operate in a complete vacuum, it offered a series of interactive Pulse Sneak Peeks leading up to launch. Associates were able to experience Pulse in a virtual setting with limited functionality over the course of three in-depth interactive sessions. After launch, the team ran an eight-week *Get to Know Pulse* series that focused on different Pulse areas and offered helpful tips along the way.

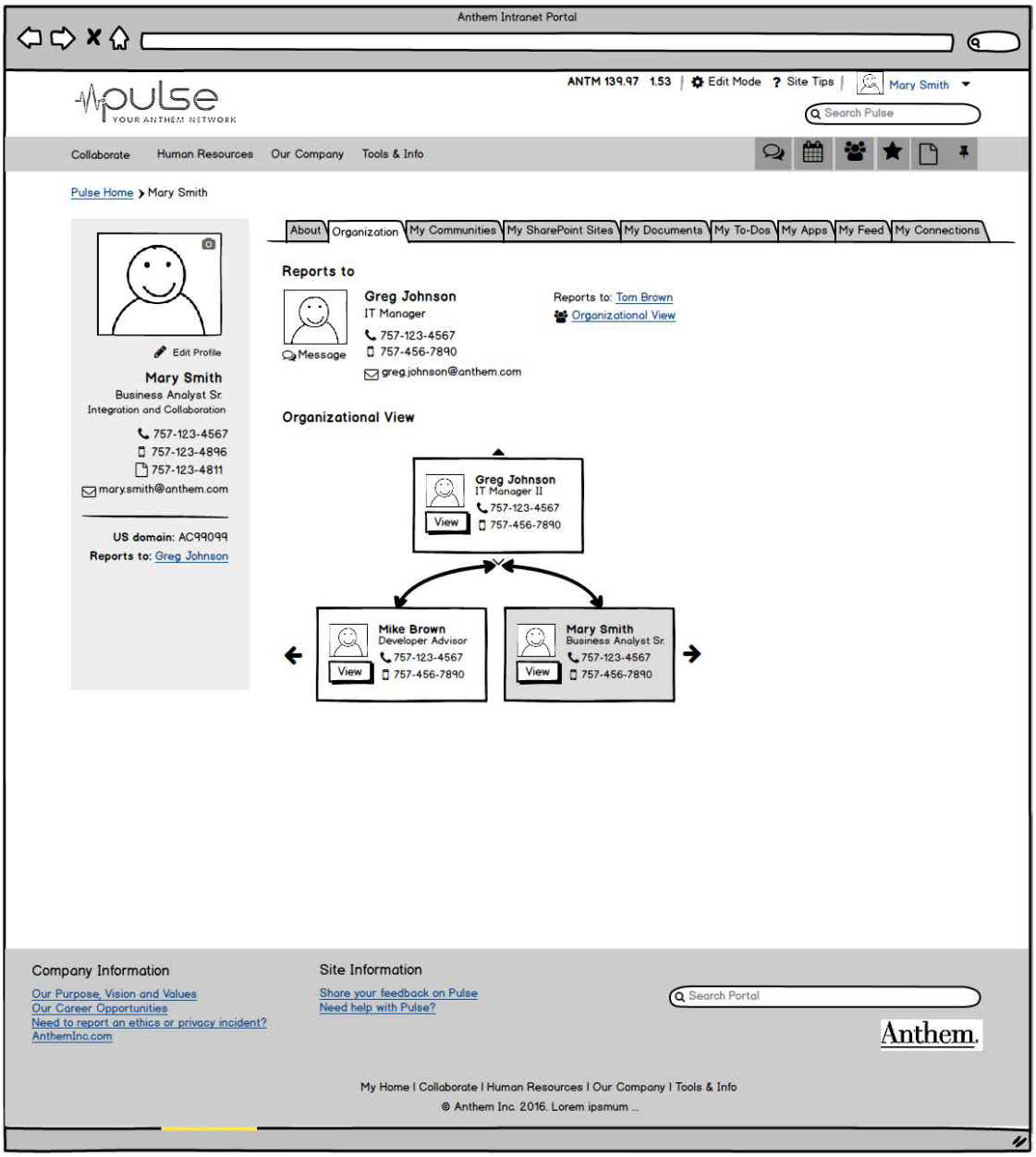
The team also called on the Pulse Ambassadors to help out on launch day. These employees served as Pulse experts who could help answer associates' questions. And, of course, the ambassadors were given early access to Pulse to help prepare them for their duties.

The team also created a comprehensive Site Wizard to help associates through the adoption process. Because Pulse has so many potential users, the team wanted to try to avoid having too many people contact the help desk or email the Pulse inbox with their questions, as those channels would likely become overwhelmed. The Site Wizard proved to be a helpful tool and is still active today.

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Buck Consulting An HR benefits consulting firm	• Landing page design and HR benefits access
FishBowl Solutions IT development and implementation team	• Oracle WebCenter customization and unique personalization that aligned with the overall vision for Pulse
Pulse Point Group Change management consulting firm	• Change management • User surveying • IT project management



Pictured: Anthem Intranet Homepage Wireframe. This homepage wireframe, created using Balsamiq, was part of the team's design workflow. Wireframes such as this helped the team discover the best solutions faster.



Pictured: Anthem Intranet Profile Page Wireframe. This is the Balsamiq wireframe created to help design the user profile page organization tab.

GOVERNANCE

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Development Team	A small cross-functional team of developers, testers, and other specialists working collaboratively to deliver a vertical slice of functionality.
Product Owner (PO)	The content authority for the Team Backlog and the only team member empowered to accept Stories as done. Also: • Defines Stories and prioritizes the backlog
Scrum Master	• Helps the team remove impediments, facilitates team events, and fosters an environment for high-performing teams
System Team	A special Agile team that provides assistance in building and using the Agile development environment, including continuous integration, test automation, and continuous deployment. This team: • Assists with the integration of assets from Agile teams • Performs end-to-end solution testing as needed • Assists with deployment and release
System Architect/Engineer	An individual or small cross-discipline team that truly applies systems thinking and also: • Defines the system's overall architecture • Helps define nonfunctional requirements • Determines the major elements and subsystems • Helps define the interfaces and collaborations among them
Release Train Engineer (RTE)	Servant leader and chief Scrum Master for the train. In this role, the RTE: • Facilitates optimizing the flow of value through the program using various mechanisms, such as the Program Kanban, Inspect & Adapt workshop, and PI Planning

Lean User Experience Team	• Embraces a mindset, a culture, and a process of Lean-Agile methods • Implements functionality in minimum viable increments and determines success by measuring results against an outcome hypothesis

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://pulse.antheminc.com
Default Status	By default, all Anthem associates have Pulse set as their homepage and cannot change this setting. A shortcut to Pulse is placed on each associate's desktop.
Remote Access	Associates can access Pulse from anywhere using two-step verification for security (log-in credentials and a one-time passcode sent via a preferred method, such as to a phone). Some Pulse content is not viewable outside of the Anthem network to ensure proper site security. However, applications such as HR transactions and expense reporting are externally available through Pulse.
Shared Workstations	Some corporate offices provide shared computer facilities to be used during breaks. Although not widely used, Pulse is accessible via these workstations.

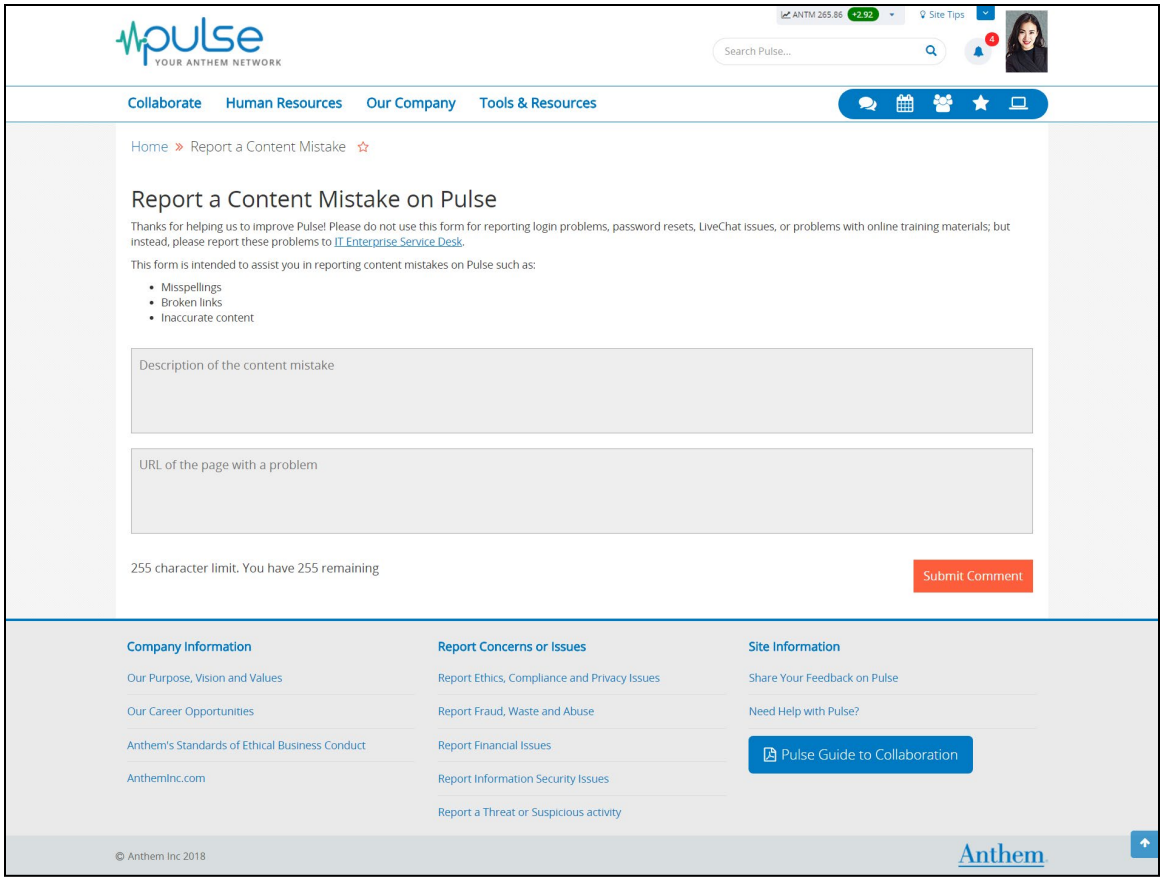
TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
November 2005	• Launch of WorkNet
September 2014	• Collaboration (commenting and liking) added to WorkNet's news articles; homepage refresh
May 2016—April 2017	• Redesign of Pulse (v.1): branding overhaul, IA, new features
April 2017	• Launch of new design
April 2018	• Redesign of main header, footer, and primary navigation, including reducing header height by half, consolidated profile photo section, and introduction of sticky navigation • Mobile responsiveness and accessibility improvements to main page template
July 2018	• Enhanced photo upload tool, including cropping and resizing, and an upgraded UX • Configurable widgets
September 2018	• Launch of Pulse (v.2)
Overall redesign timeframe: 1 year	

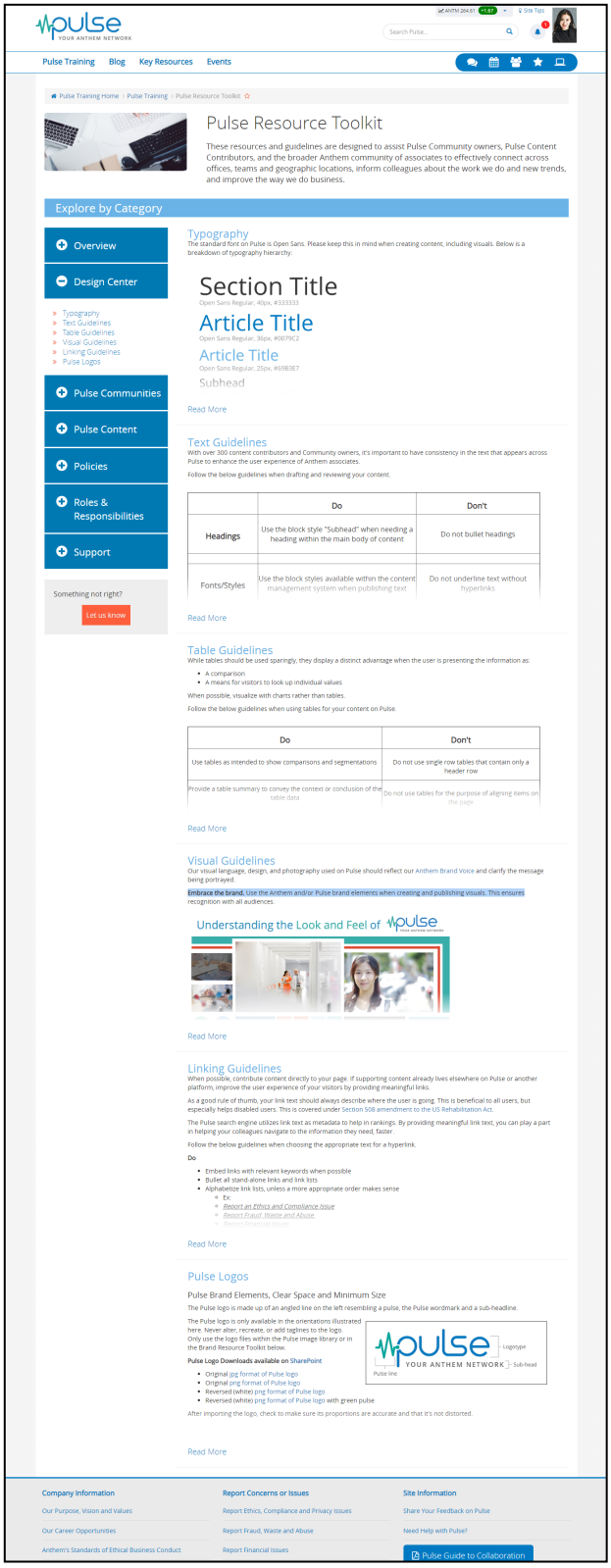
CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Contributors	Pulse currently has 364 contributors. The Corporate Communication team member who oversees each business area selects contributors for the *Our Company*, *HR*, and *Tools & Resources* sections. Few, if any, Pulse contributors work full-time on the intranet; people contribute to their intranet areas on top of their standard job requirements. Also, any employee interested in having a community can request one and contribute to its content.
Encouraging Contribution	Each area or community can have one or more people contribute content. Contributors are motivated from the top. Each section on Pulse has accountability for its own content within the intranet's distributed contribution model. Almost all intranet areas are also engaged with and encouraged by the site's partnership with Corporate Communications.
Training	Anyone who wants to be a contributor must attend training. The training lasts two hours and is held through a conference call and Skype for Business screen share. The Pulse Trainer shows attendees how to contribute various types of content, and the intranet's *Pulse Training Community* section provides a library of PDFs for all contributor tasks. Once people have completed the training, they are granted contributor access to Pulse.
Maintaining Quality	The Pulse Admin audits content on a regular basis. If content is outdated or poorly displayed, the admin contacts the contributor and works with that person to improve the area.

Culling Content	When the team moved from the more than 10-year-old WorkNet to the new Pulse, it essentially started from scratch. Outside of core business documents, which are meticulously maintained and heavily regulated, only minimal content was migrated. The vast majority of content was recreated in the new system. The team engaged with contributors in the site's major areas, and Corporate Communications partners rewrote and updated much of the content. The switch also reduced the number of contributors significantly. The old content was all archived per a document-retention policy and could be retrieved if needed for audit. This start-from-scratch approach was somewhat dictated by the fact that the legacy system was so old that the team did not have an automated system for identifying and updating old content. Recreating the content was a lot of work, but it was worth it for quality purposes—and ultimately satisfying to start with a clean slate.



Pictured: Anthem Intranet Site Feedback Form. Users can report feedback directly through the site. A button for this feedback form can be found on nearly every page.



Pictured: Anthem Intranet Resource Toolkit. The *Pulse Resource Toolkit* lists resources and guidelines to assist Pulse community owners, Pulse content contributors, and the broader Anthem community of associates to effectively connect across offices and improve the way business is done.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Web Tier: IBM HTTP Server • App Tier: Oracle WebLogic Server 12c • Operating System: Redhat Enterprise Linux Server release 6.8 (Santiago) • Hardware: AMD 64 • Database: Oracle 12c RAC Enterprise DB
Bug Tracking/Quality Assurance	• Bug Tracking & QA: JIRA Atlassian • Monitoring: Splunk, CA APM, Wily • Documentation: Confluence Atlassian
Design Tools	• Architecture Design: Microsoft Visio 2013 • UX Design: Adobe Photoshop, Balsamiq, InVision
Site Building Tools	• Eclipse, Oracle JDeveloper 12c, Web Storm, Microsoft VS Code, Atom IDE
Content Management Tools	• Oracle WebCenter Content 12c
Search	• Google Search Appliance (GSA)
Other Functions	• App Tier Caching: Oracle Coherence Caching 12c • Web Tire Caching: Apache Module Caching

Technology Migration

The Anthem team's technology migration progressed as follows:

- Migrated legacy application from unsupported technology (Oracle Content Server 10g) to the next-generation intranet platform (Oracle Content Server 12c) by launching automated content migration and enhancement.
- Upgraded and migrated legacy application from Windows platform to Linux for better security and performance.
- Introduced architecture transformation foundational framework to replace the third-party licensed products with more reusable components in an Agile System Development Life Cycle (SDLC).
- Replaced Google Search Appliance (GSA) with Elastic Search as an enterprise search solution as GSA was scheduled to reach the end of its life support at the end of 2018.

MOBILE

When designing Pulse, the team took a design approach that emphasized the optimization of the desktop experience first, and then mobile. The majority of users access the site via their desktop daily; while the team knew that mobile would be nice to have, it was important to have a solid desktop version first. The team entertained the idea of a mobile app for a few months, but stepped away from that idea. Instead, it set out to make the desktop version best-in-class and marry it with a responsive web design. While focusing on the responsive design, the team also sought to identify which aspects of the site would be utilized most in the context of a responsive mobile experience. It ultimately determined these aspects to be the people finder and org charts.

Target Platforms and Devices

The Anthem design team wanted Pulse to work across all devices and be specifically optimized for company-issued devices. It therefore adopted the following mobile screen sizes as the target platforms: iPad Pro and iPhone 8 and later.

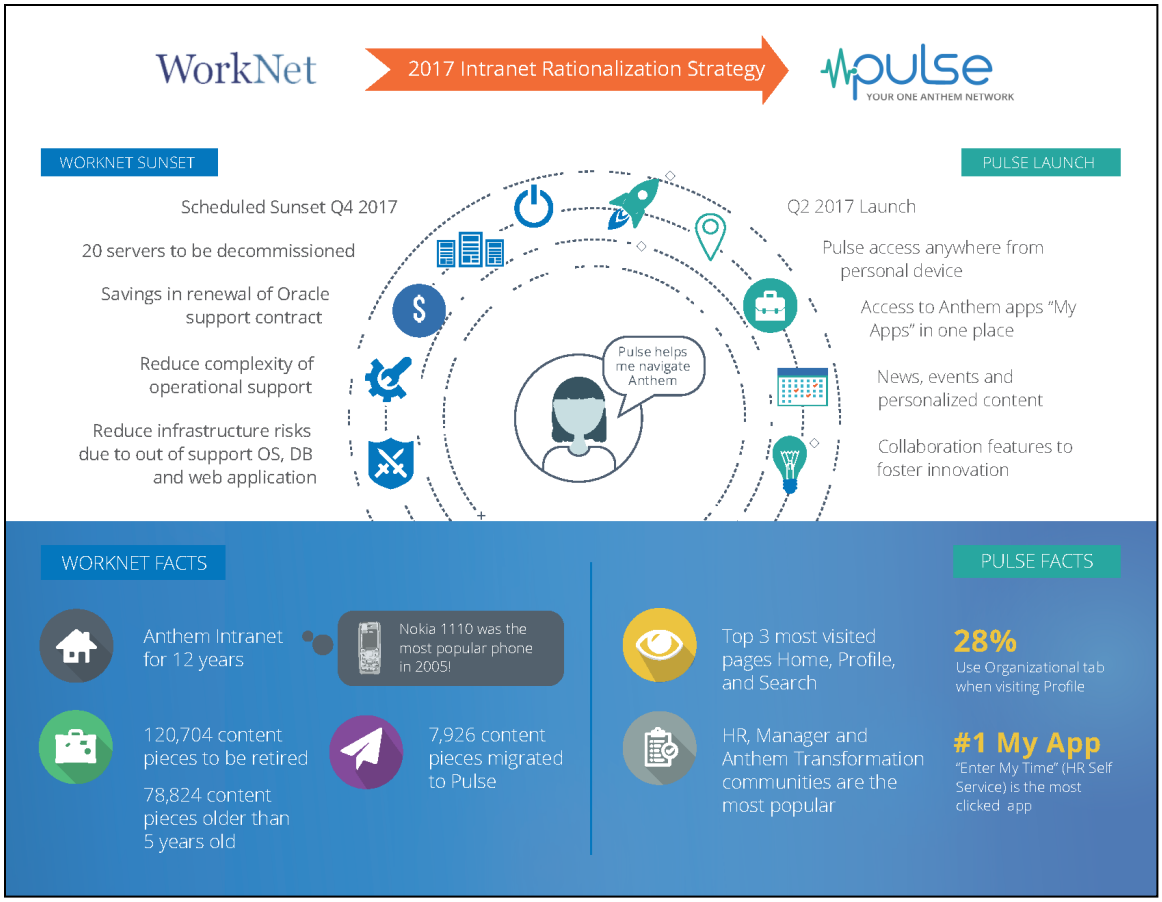
The team also conducted testing on Android for those associates accessing the intranet through personal devices.

ROI

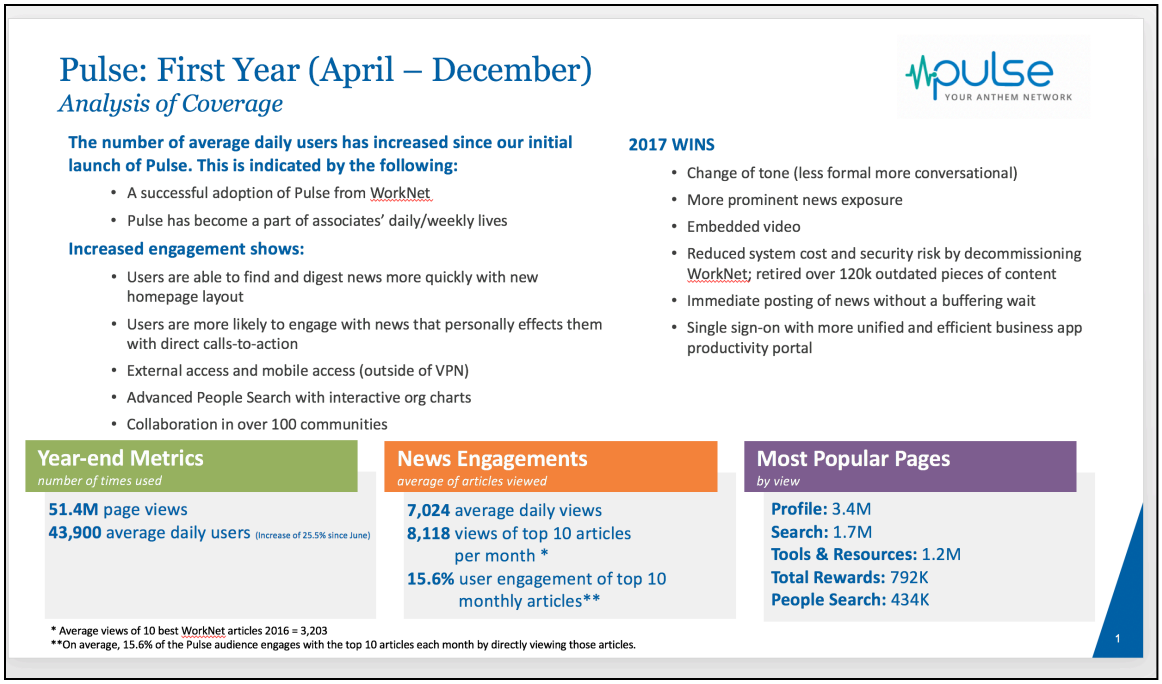
Aside from the obvious benefit of Pulse providing Anthem with a much-needed intranet lift, significant ROI was also realized shortly after launch. From an IT perspective, the new intranet allowed for the decommissioning of 20 stressed servers and reduced significant cost and complexity of Oracle operational support, including reduced infrastructure risk and outdated OS and DB web applications.

The launch of Pulse also allowed for single sign-on capability and previously unavailable external access to more than 130 specific Anthem apps, which users can now manage and access simply and securely. Pulse also proved to be an immediate win in terms of associate engagement, which rose by more than 250% for Pulse content. Also, the Pulse team was able to expire more than 120,000 pieces of outdated WorkNet content.

Overall, the team has been extremely happy with the performance and new abilities that Pulse provides.



Pictured: Anthem Intranet Worknet vs. Pulse. This infographic illustrates some of the key differences between Anthem's previous intranet, WorkNet, and its current Pulse platform.



Pictured: Anthem Intranet First Year Stats. This graphic shows the 2017 year-end key metrics for the new Pulse intranet.

LESSONS LEARNED

The Anthem team learned many lessons during the Pulse project, and it shares two key lessons here:

- **Launch slow, but fail quickly.** "If you have the time, use it. Launch slow, but fail quickly. Don't feel rushed to move on to the next thing. Respect your timeline, but also demand perfection, if not close to it. If something isn't right, fix it. Always act with your end users in mind and don't be clouded by your own curse of knowledge. Just because you know how something works and realize what value it adds doesn't mean the end user will. Additionally, make sure that your team is made up of diverse individuals who really care about the product and realize the impact it can have. Give everyone a voice. From end users to project testers to those on your development and design teams, everyone has great value to add. Simply allow them to add that value with their voice, perspective, and opinion."
- **Pay close attention to change management efforts.** "Change management is especially important if an organization has a lot of diverse users. Ease your audience and users into the adoption and do not just drop the new system on them. The Pulse team found that seeing is believing, so don't be afraid to give glimpses into the current state and vision for the final product. Lastly, once live, don't leave users on their own. Continue to support them and make sure that they feel a sense of ownership and ask them for their input. Make sure they know you value their input, but the team can't do everything."

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.

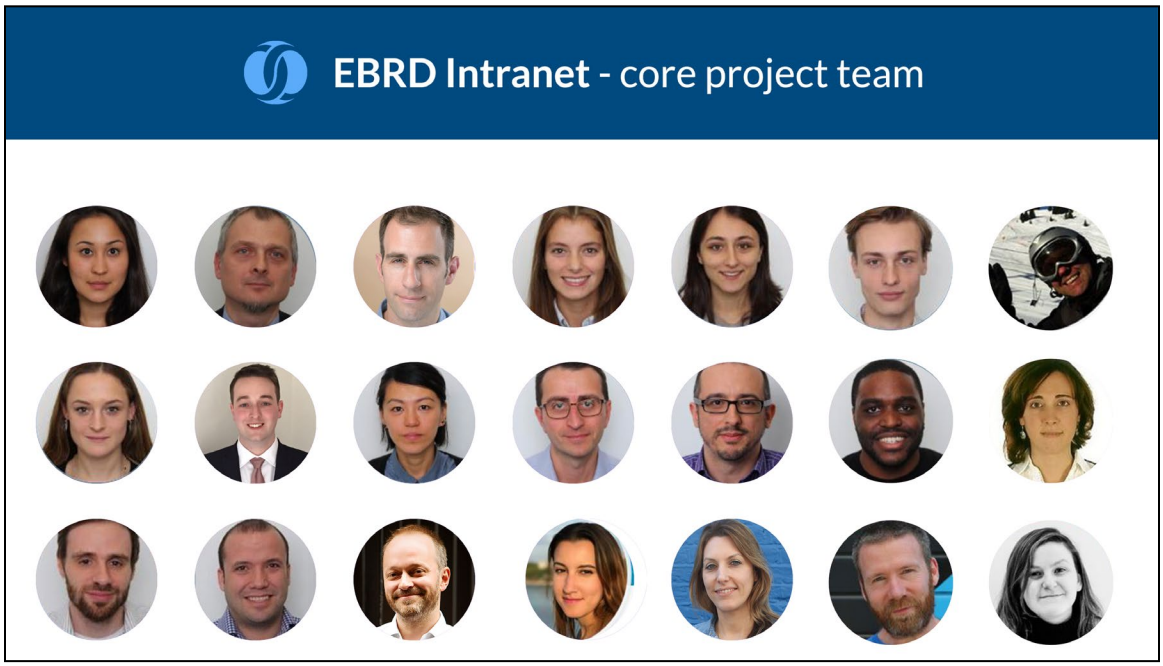
UX and design/creative services (Manifesto Digital): Richard Williams, Principal Design Consultant; Adi Harari, UX Consultant; Mark Ellis, Creative Director; Yasmin El-Amery, Designer.

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 Guttierez, 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.

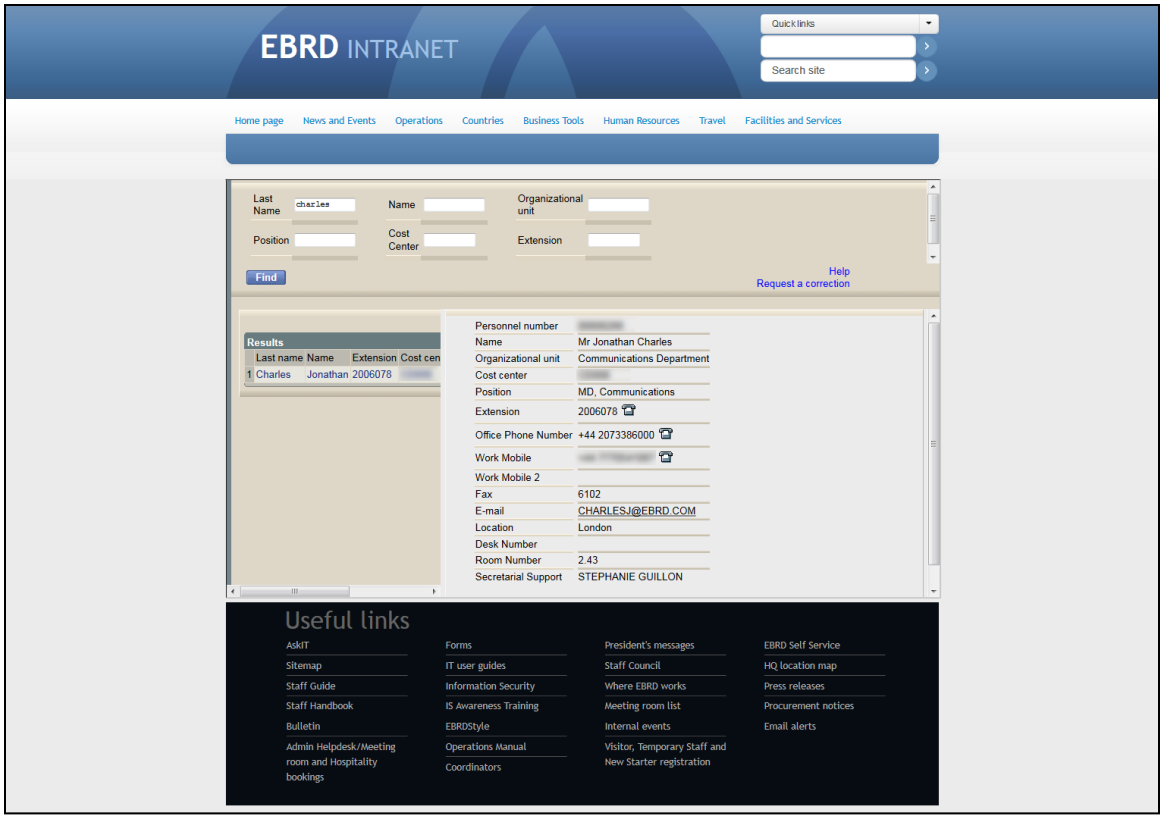
  Team members took a proactive approach to quelling these justifiable fears: From the start of the project, they engaged in discussions with an array of stakeholders, including members from IT, risk management, and communications. Contingency planning was deemed an effective way to settle many things. 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.

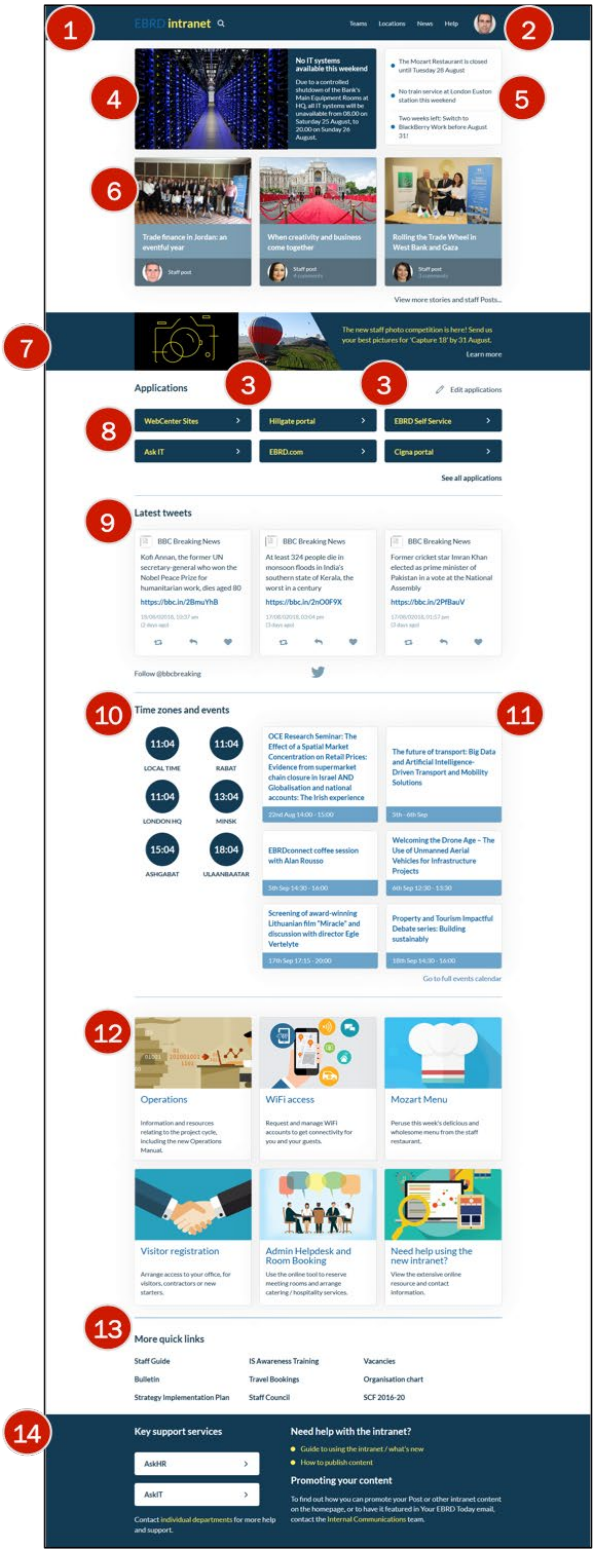
- **Testing personalization:** Time and resource constraints meant that the CMS couldn't be configured to simulate, during testing, how the new intranet would look to a particular user. However, the team decided very early on that the new intranet would have this type of role-based personalization. It 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.



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.

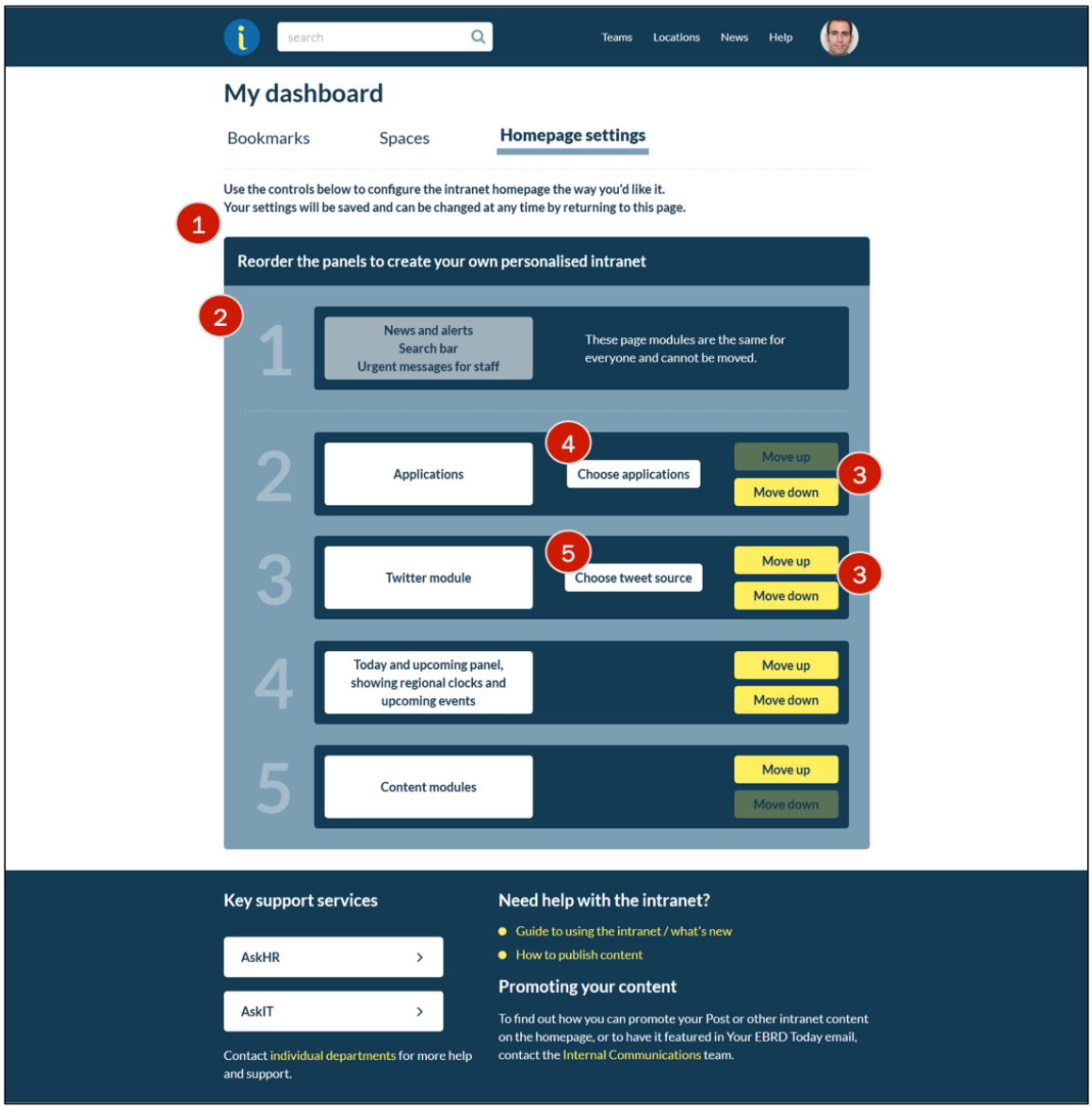
1. **Logo and global navigation:** A thick dark blue bar at the top delineates the intranet logo, search icon, and global navigation menu. The heavy visual treatment anchors these always-present, vital items. User research helped the team select the top-level navigation options: *Teams*, *Locations* (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



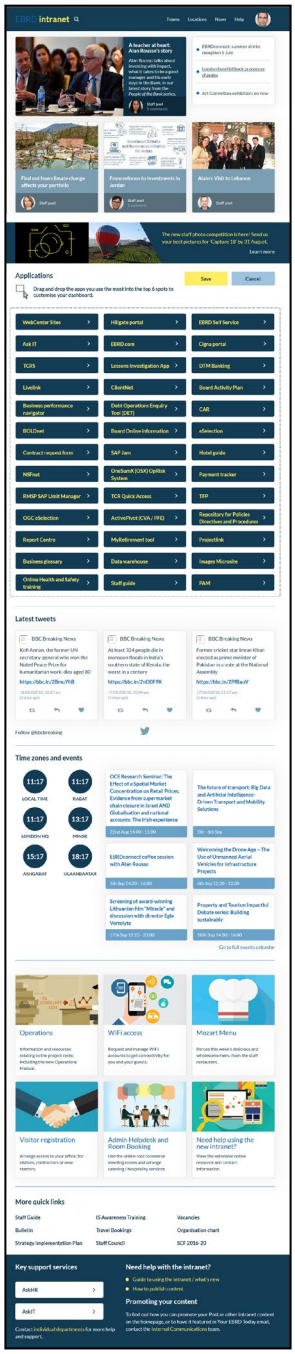
Pictured: EBRD Intranet Edit Homepage. Users can move sections of the homepage to suit their needs.

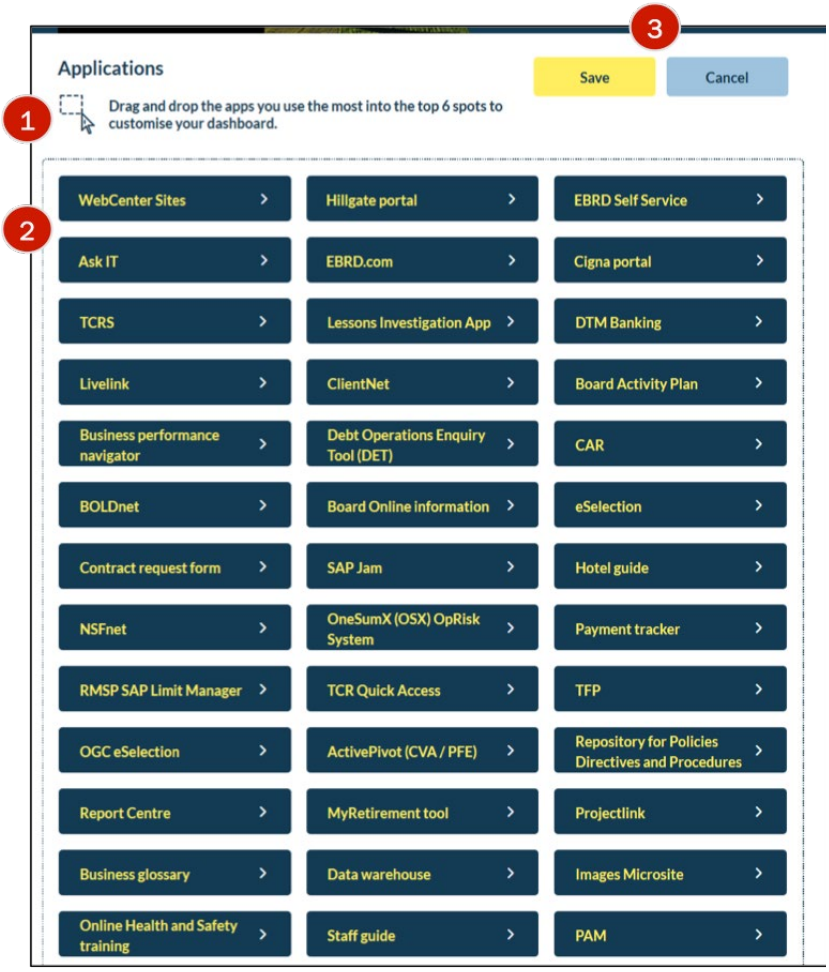
Homepage Edits, Highlights

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





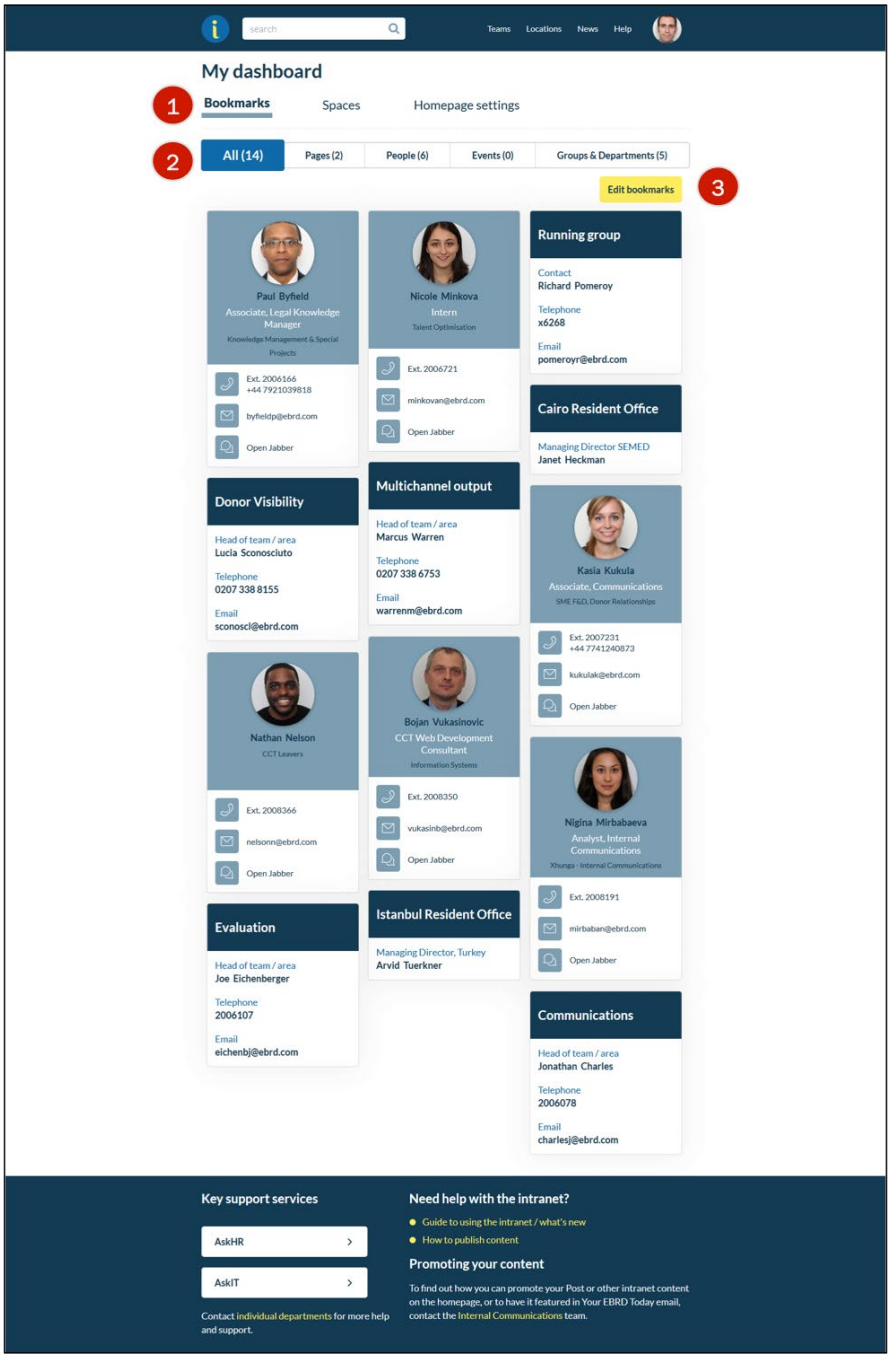
Pictured: EBRD Intranet Edit Homepage Apps.
Users can drag their top six chosen apps into position.

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



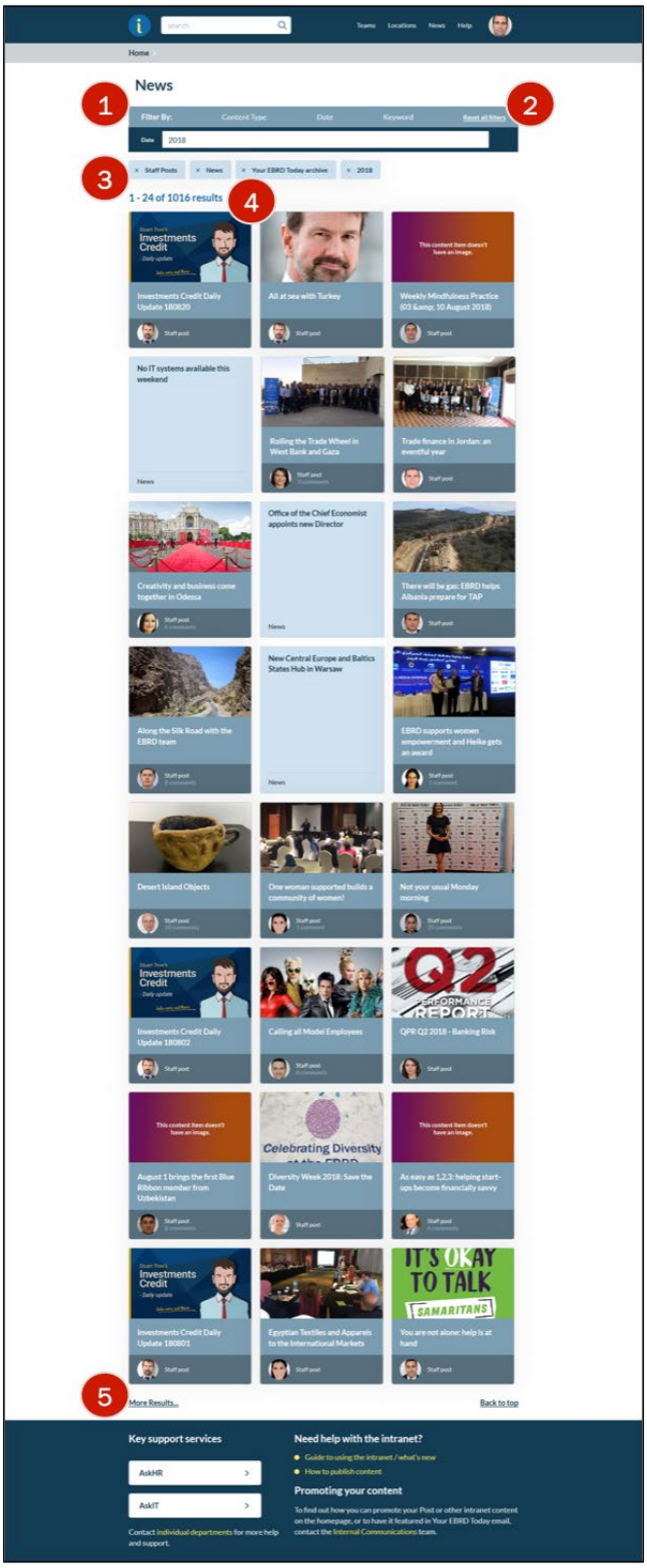
Pictured: EBRD Intranet *Bookmarks*. Users can access and edit their bookmarks on the *Bookmarks* tab of *My Dashboard*.

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

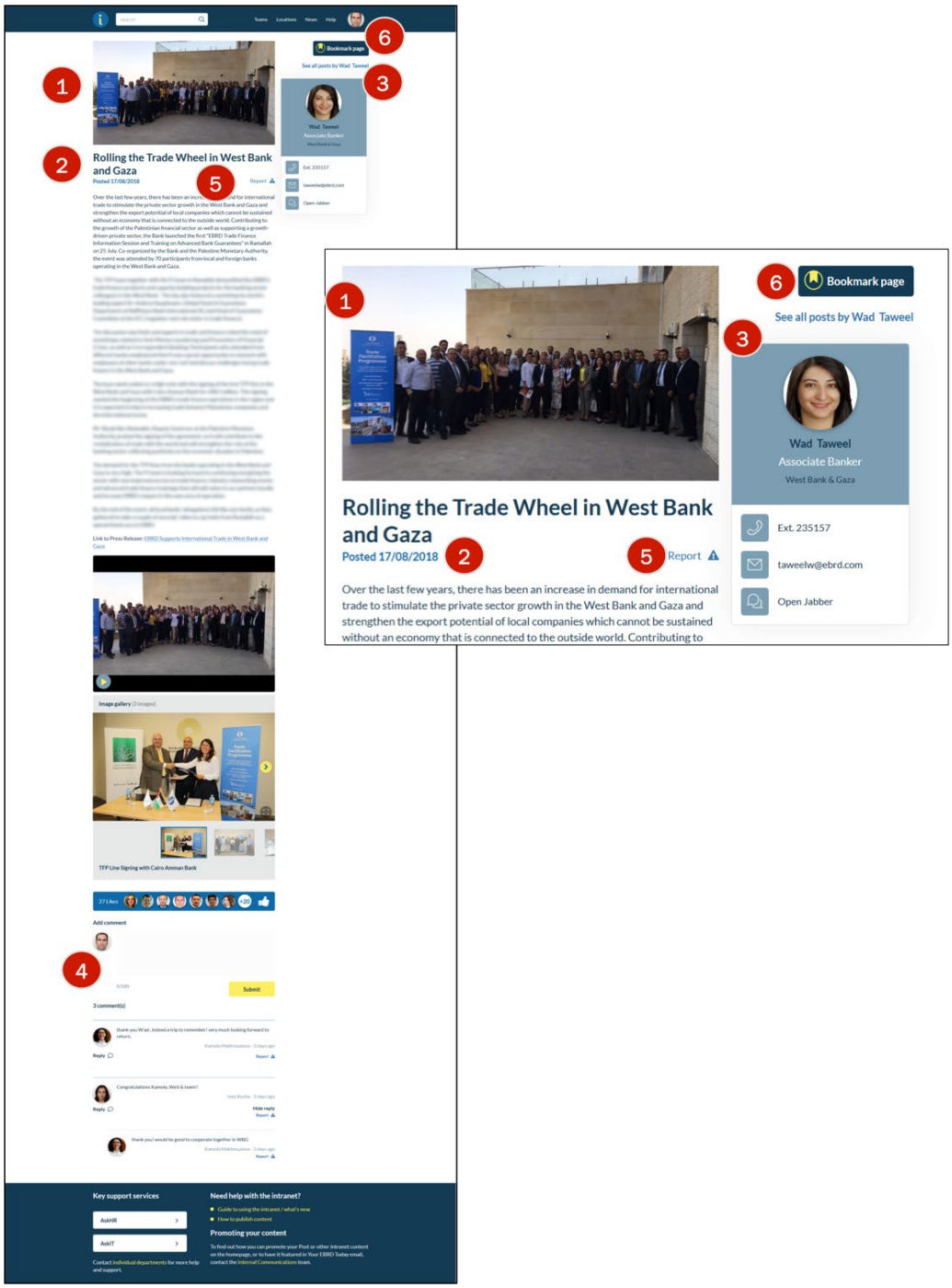
Pictured: EBRD Intranet *News*. All news is consolidated on the *News* page.

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)

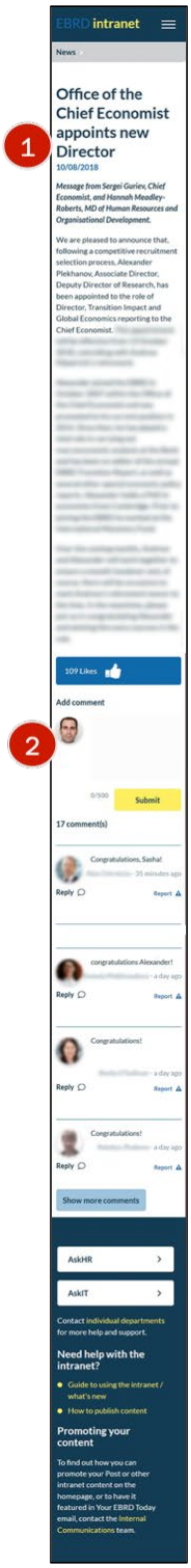


Pictured: EBRD Intranet Employee Article (Post). Posts are articles written by any employee who is not part of the Corporate Communications Department.

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

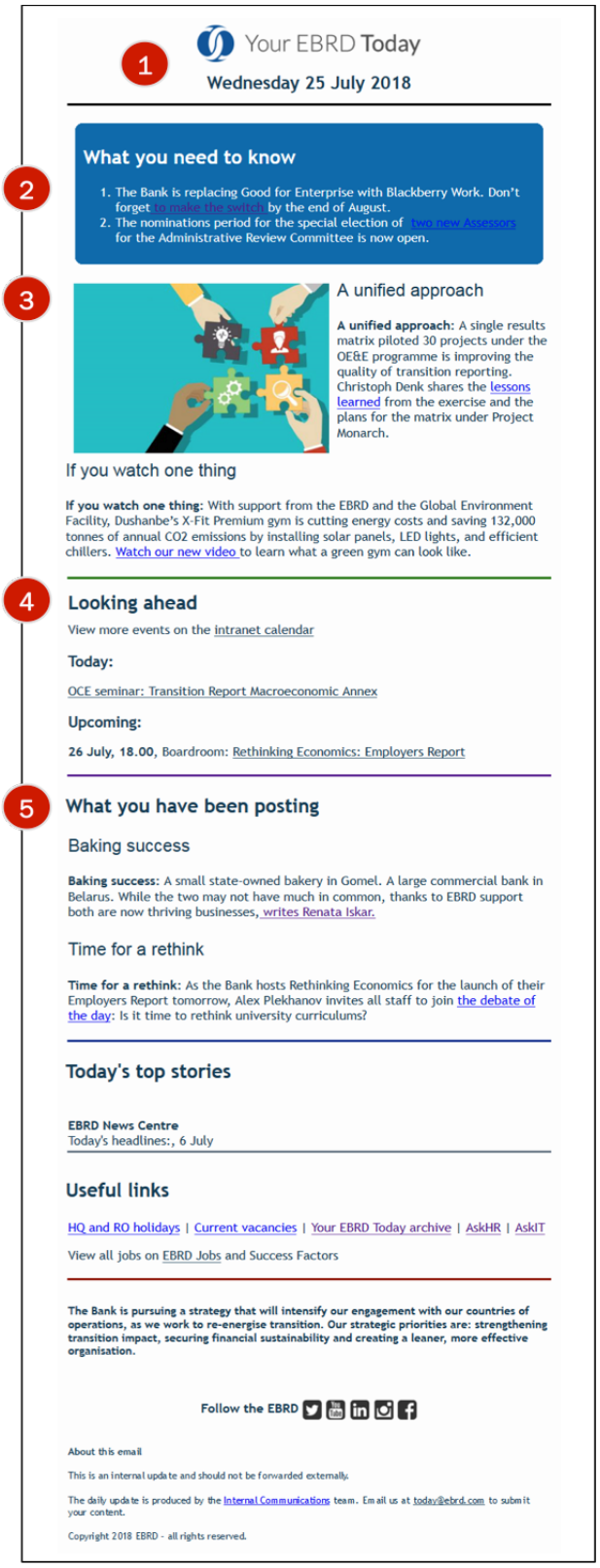
Pictured: EBRD Intranet Mobile Articles View. Articles are streamlined for mobile access.

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 at 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.



Email Newsletter

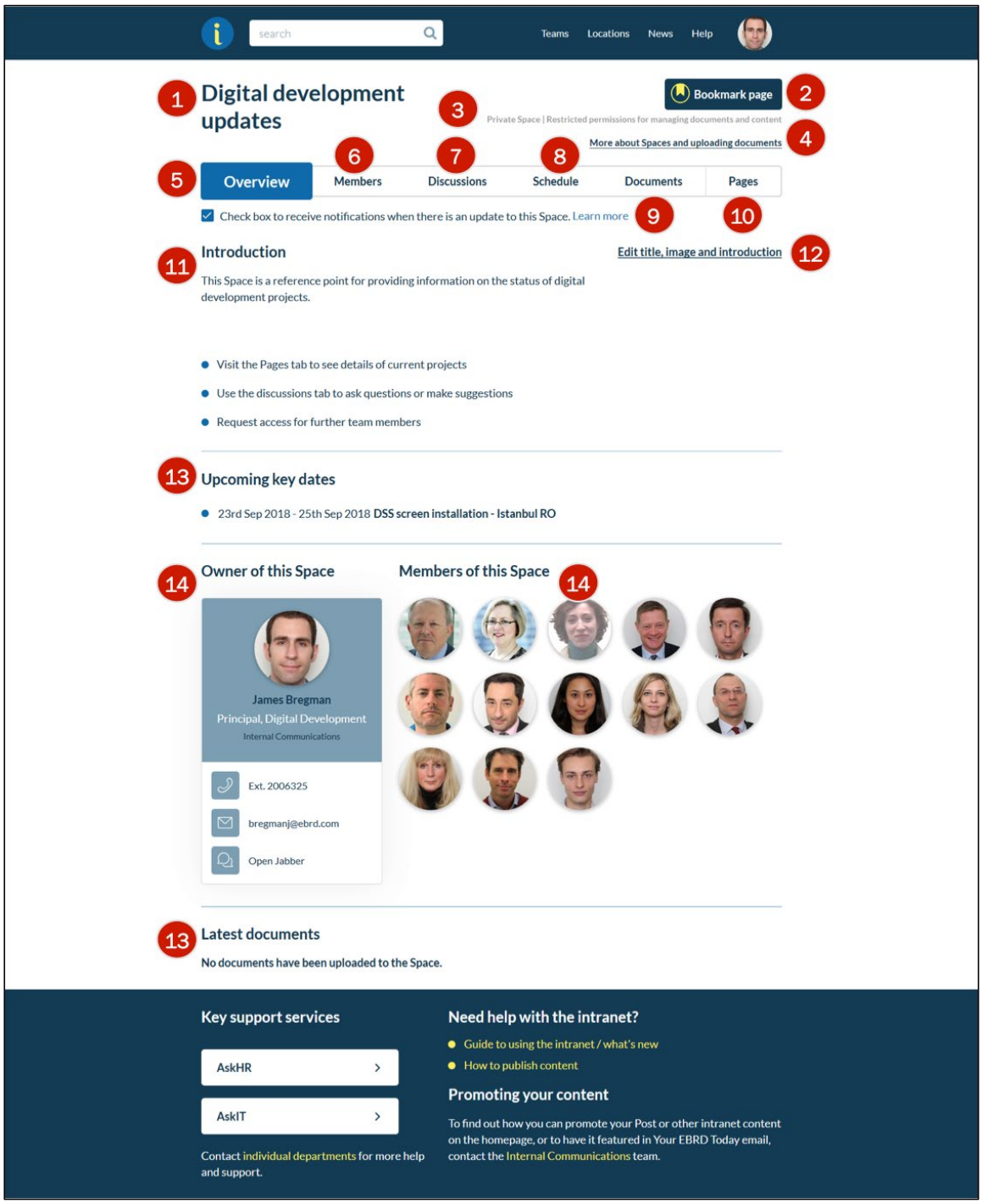
Pictured: EBRD Intranet Email Newsletter. The *Your ERB Today* email newsletter is sent to all employees once a day to brief them on the day's news topics and announcements.

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



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.

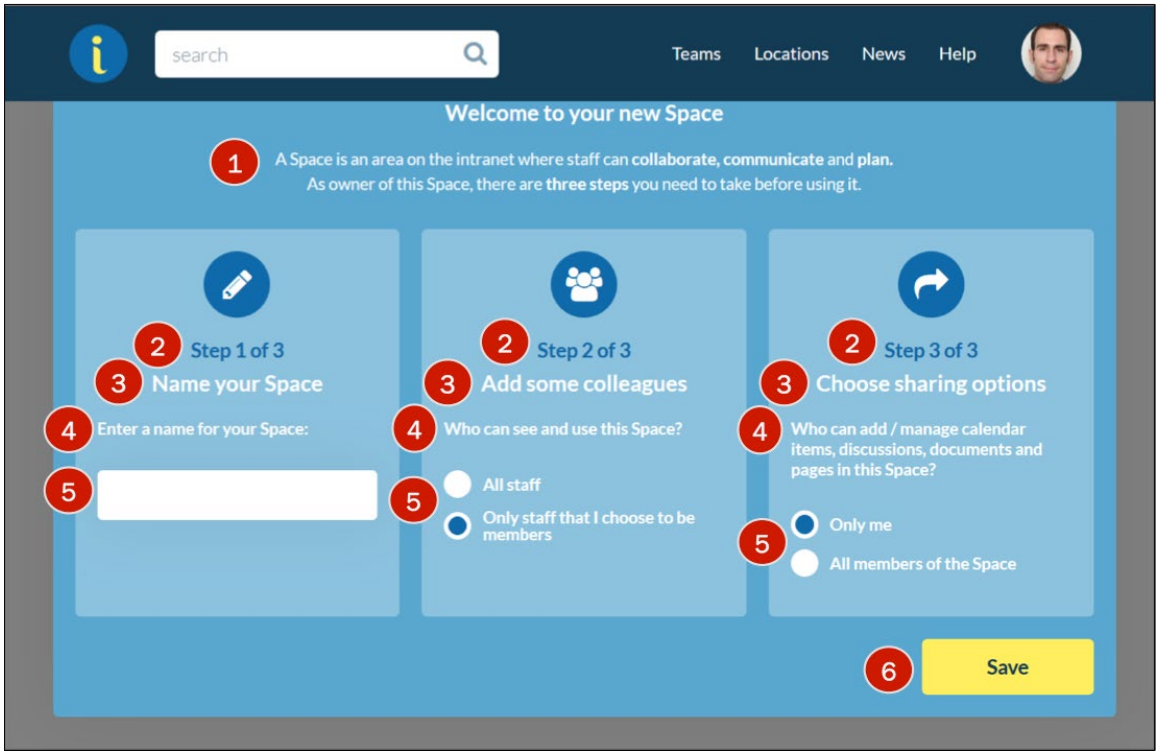
Another great benefit of the individual *Spaces* is that they are easy to find; they are included in site search and saved on their members' profile pages.

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 tile, 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



Pictured: EBRD Intranet Space Creation. Employees can create a new space quickly and easily.

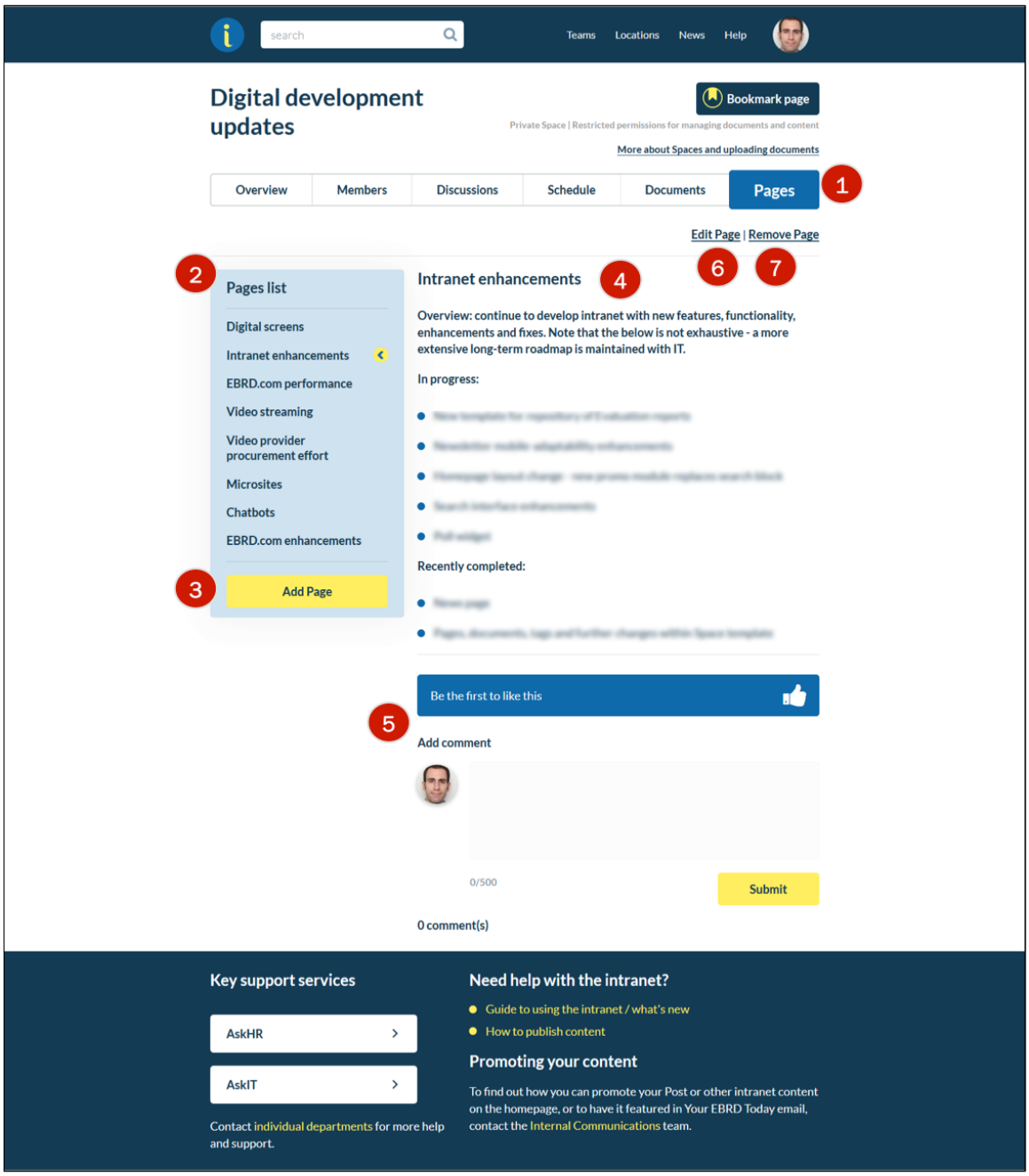
Space Creation, Highlights

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)



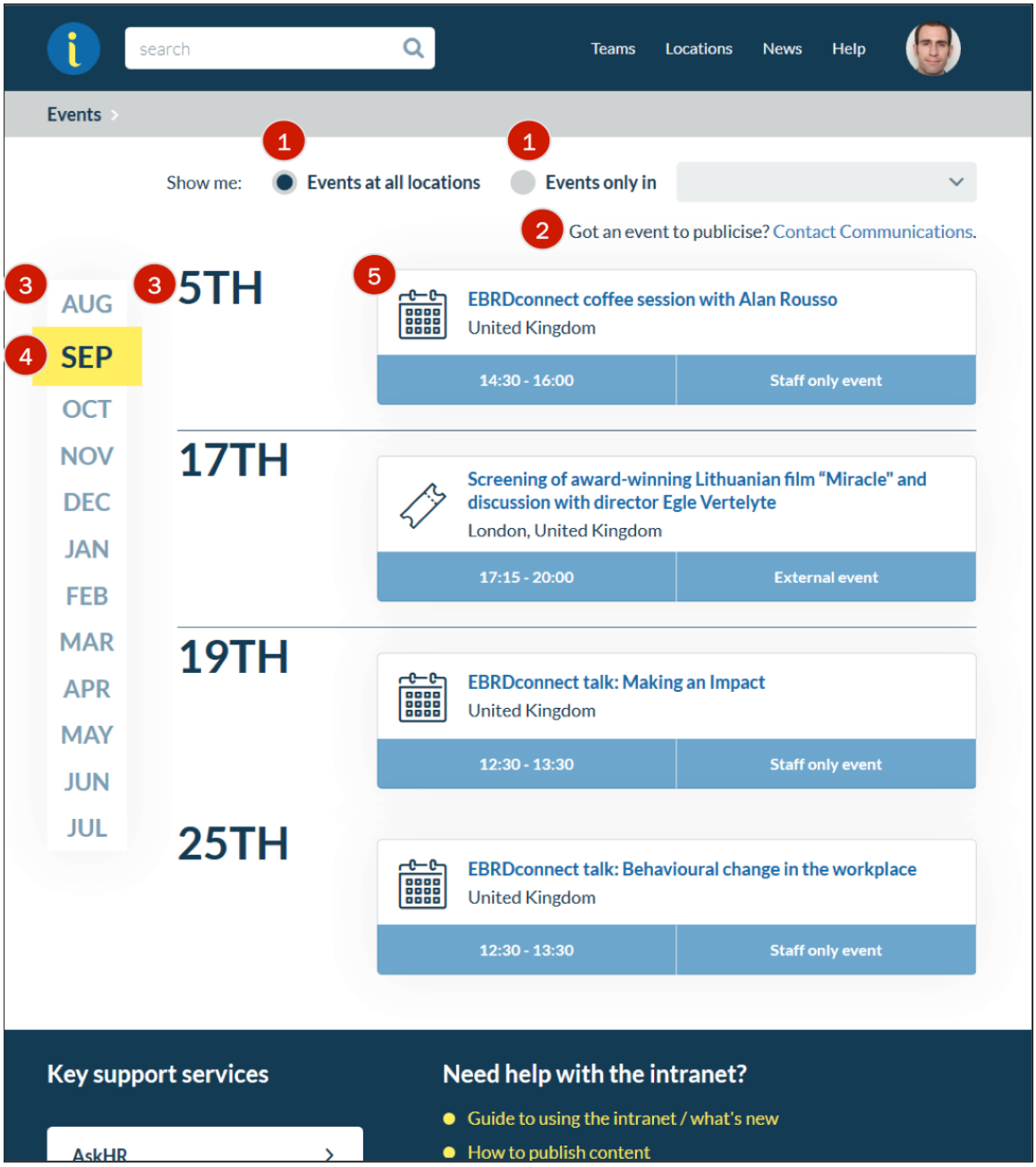
Pictured: EBRD Intranet Space Pages (Wiki). Users can create webpages in the space related to the project.

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



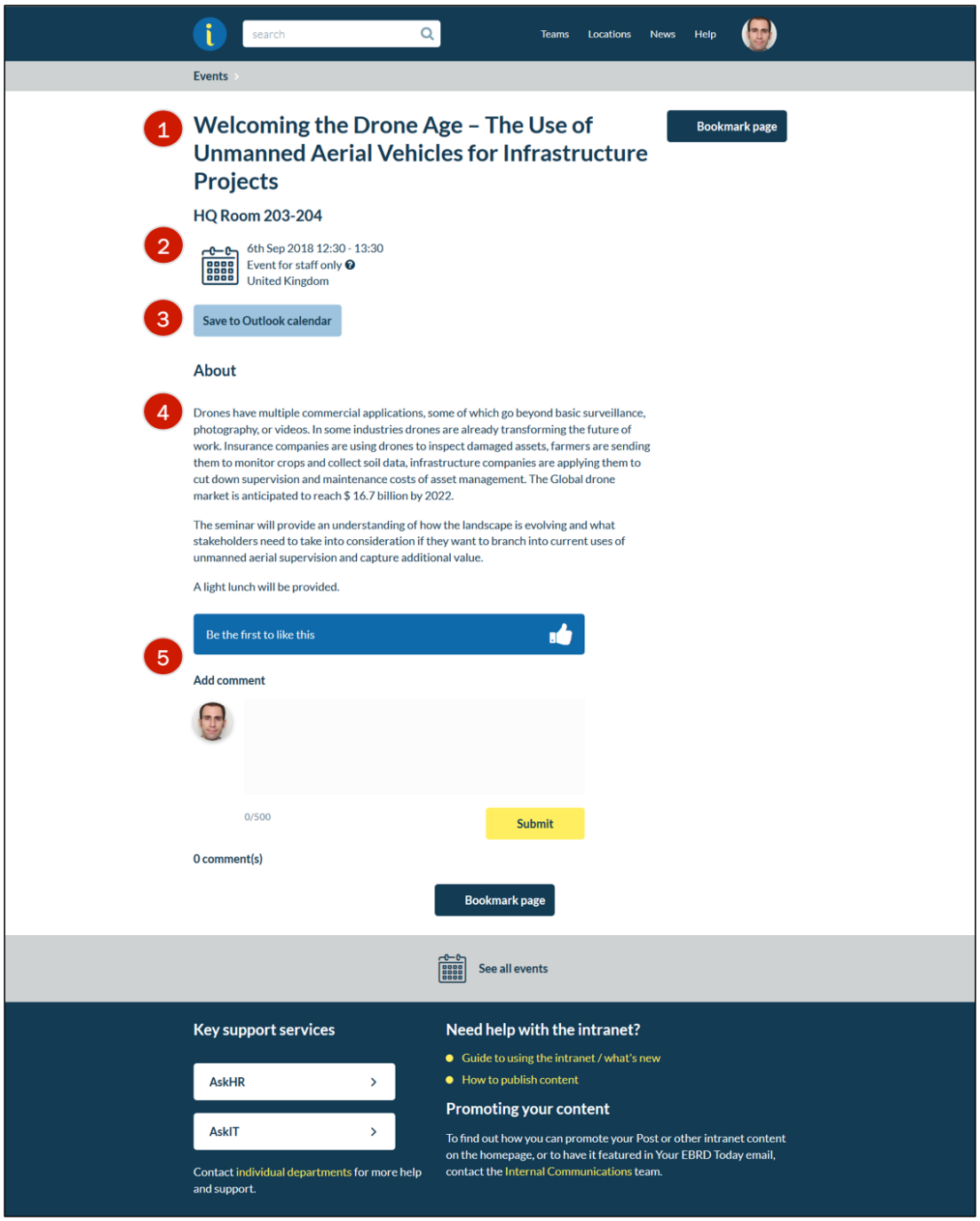
Pictured: EBRD Intranet Calendar. Most employees access the EBRD corporate calendar regularly.

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



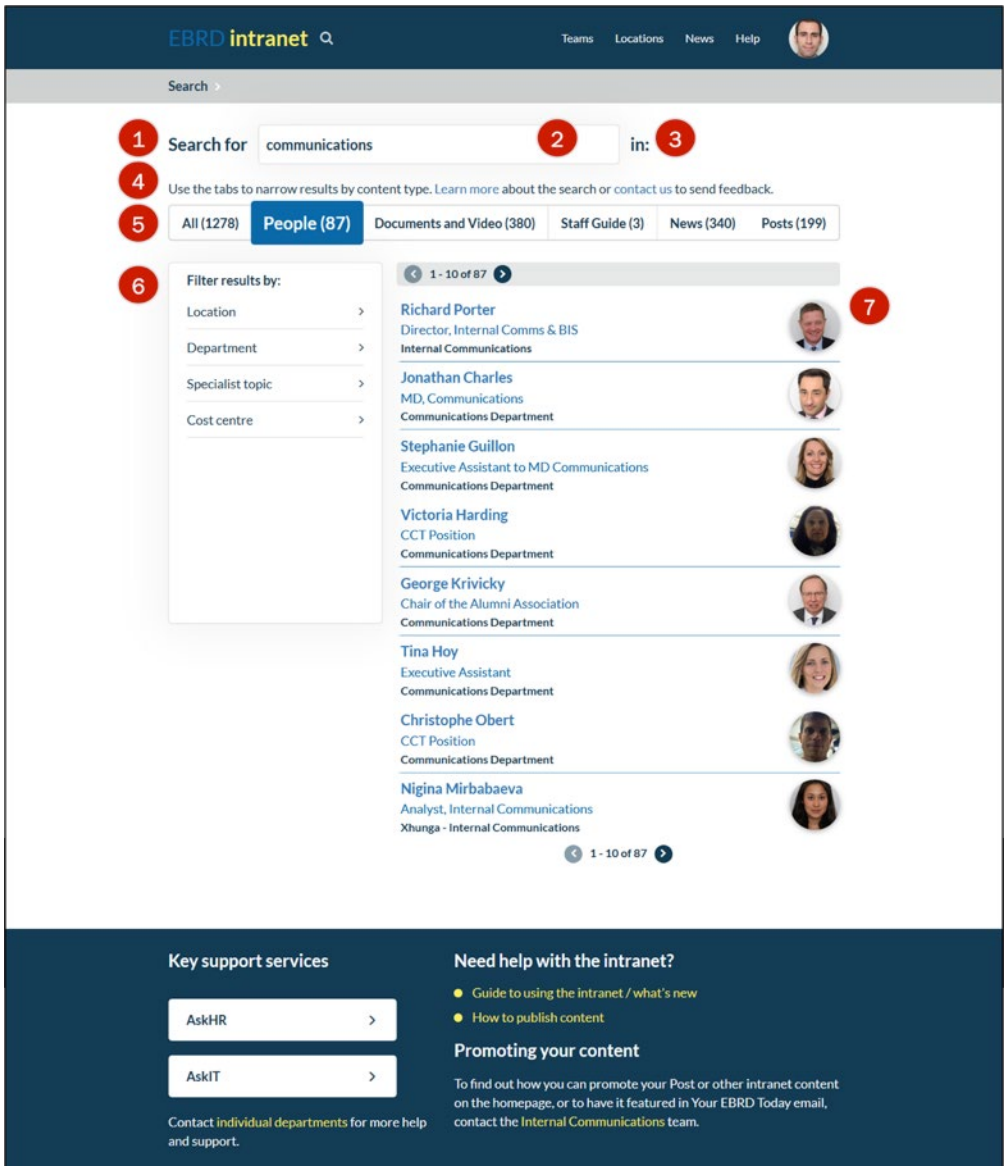
Pictured: EBRD Intranet Events. Each event has its own detail page that summarizes the event information and its time and location.

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)



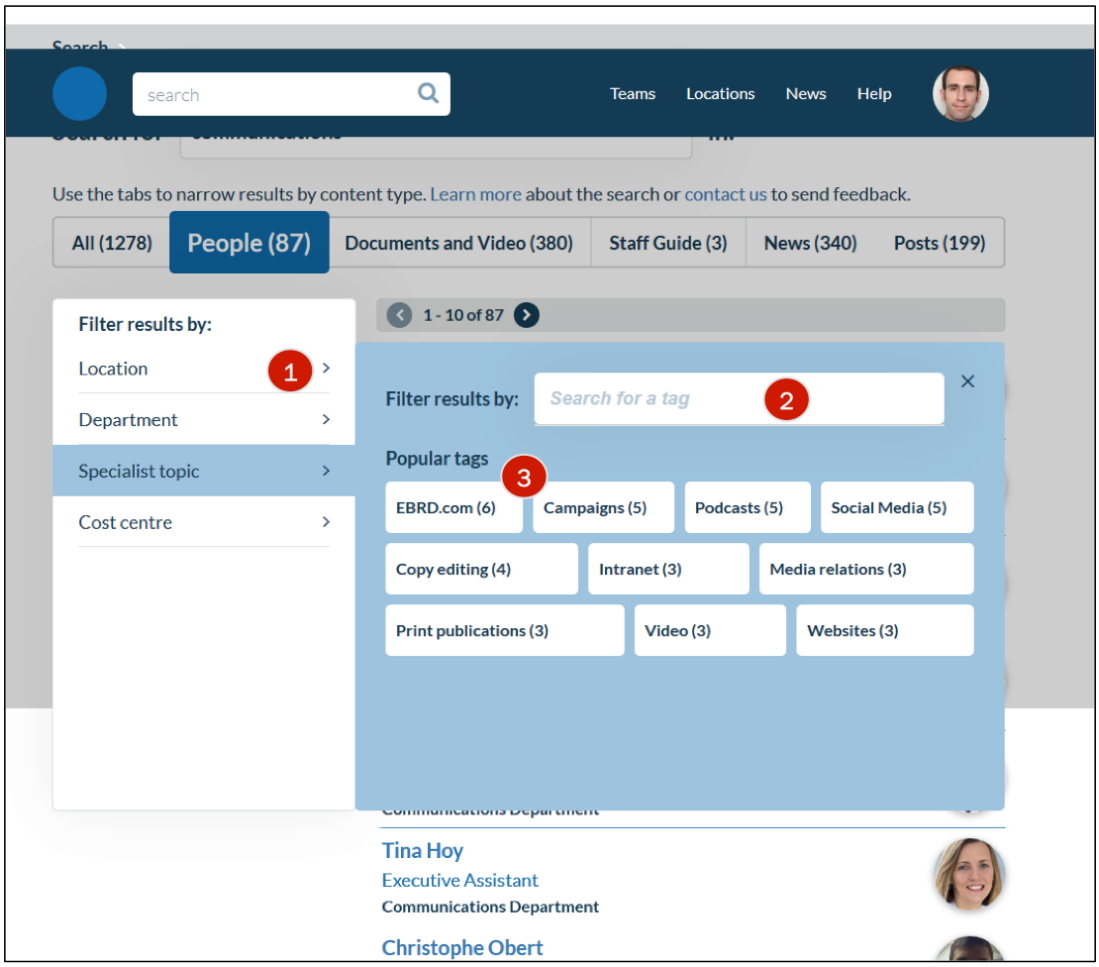
Pictured: EBRD Intranet Search Results. Search results appear as users type. Users can filter the results by various criteria.

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

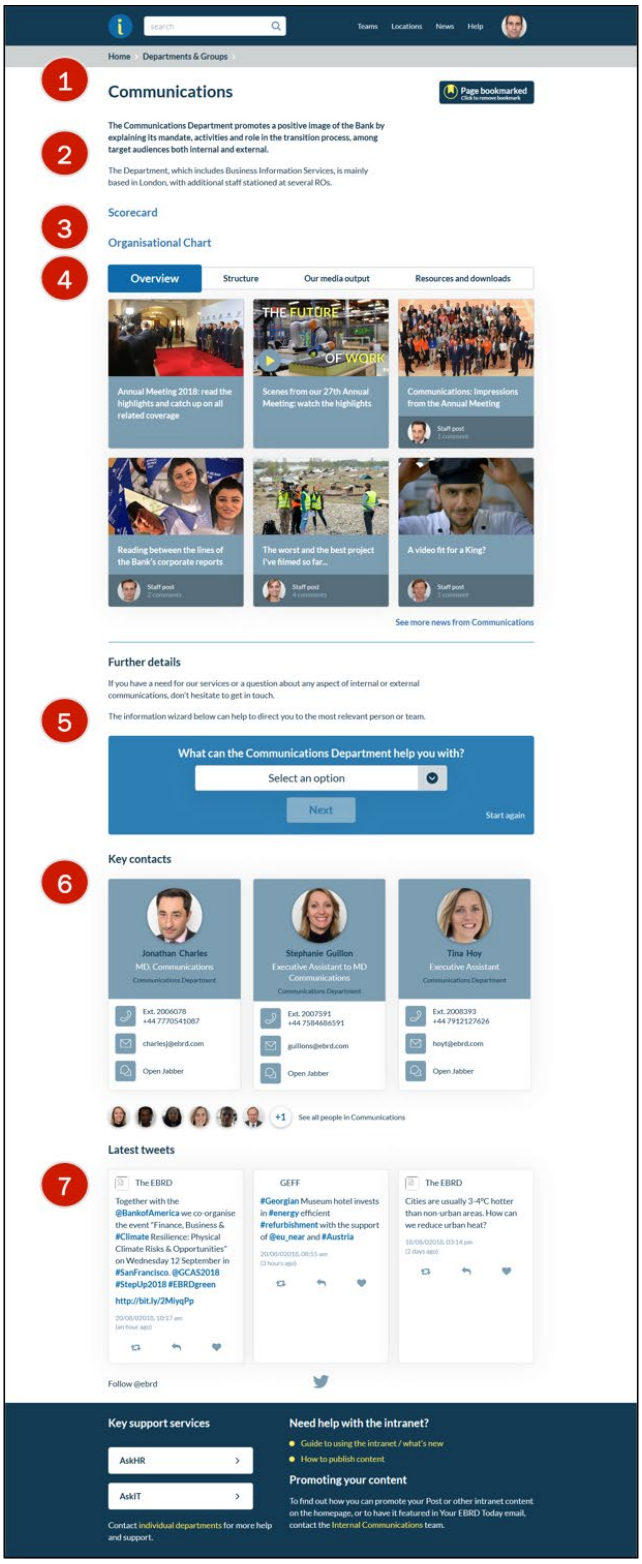


Pictured: EBRD Intranet SERP Filters. The suggested tags make using filters error-proof.

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.



Department

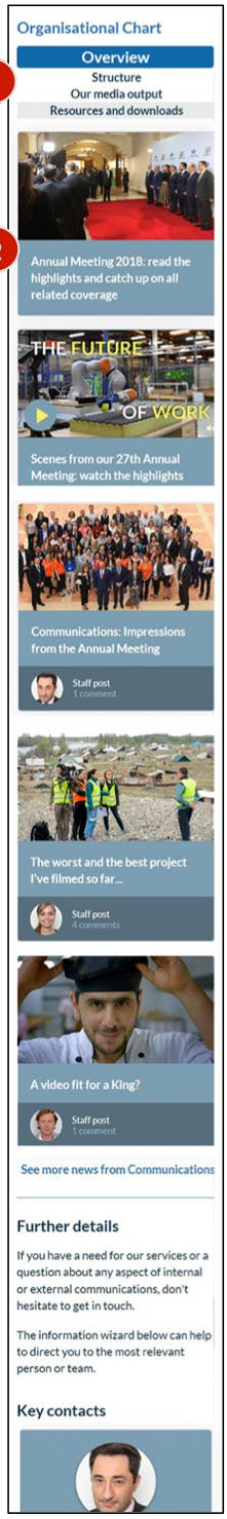
Pictured: EBRD Intranet Department Pages. All teams and groups are represented on the EBRD intranet. These sites use the *Team* template, sometimes with minor tweaks.

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



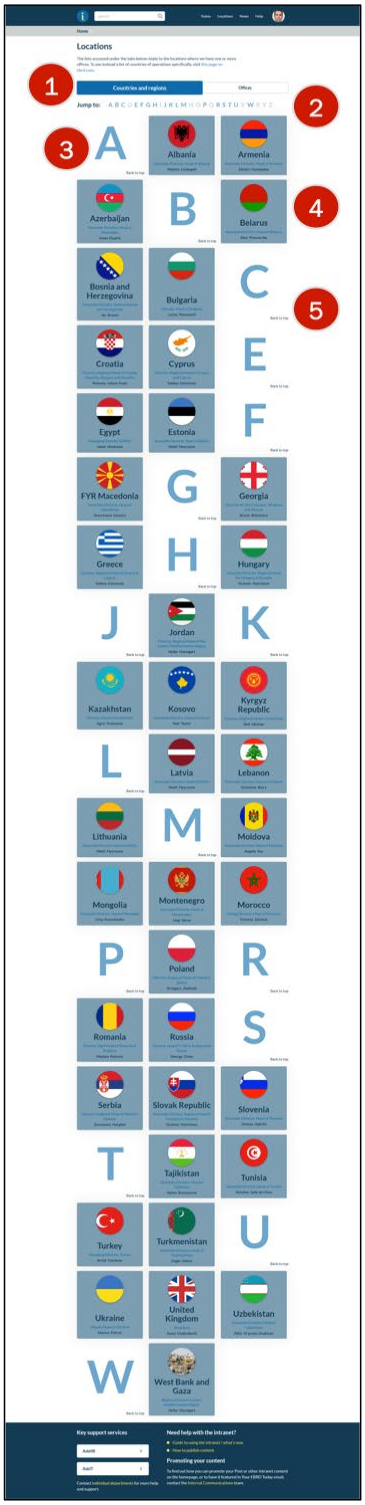
Pictured: EBRD Intranet Department Page, Mobile View. The same information on desktop appears on mobile, reformatted to fit the smaller screen.

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





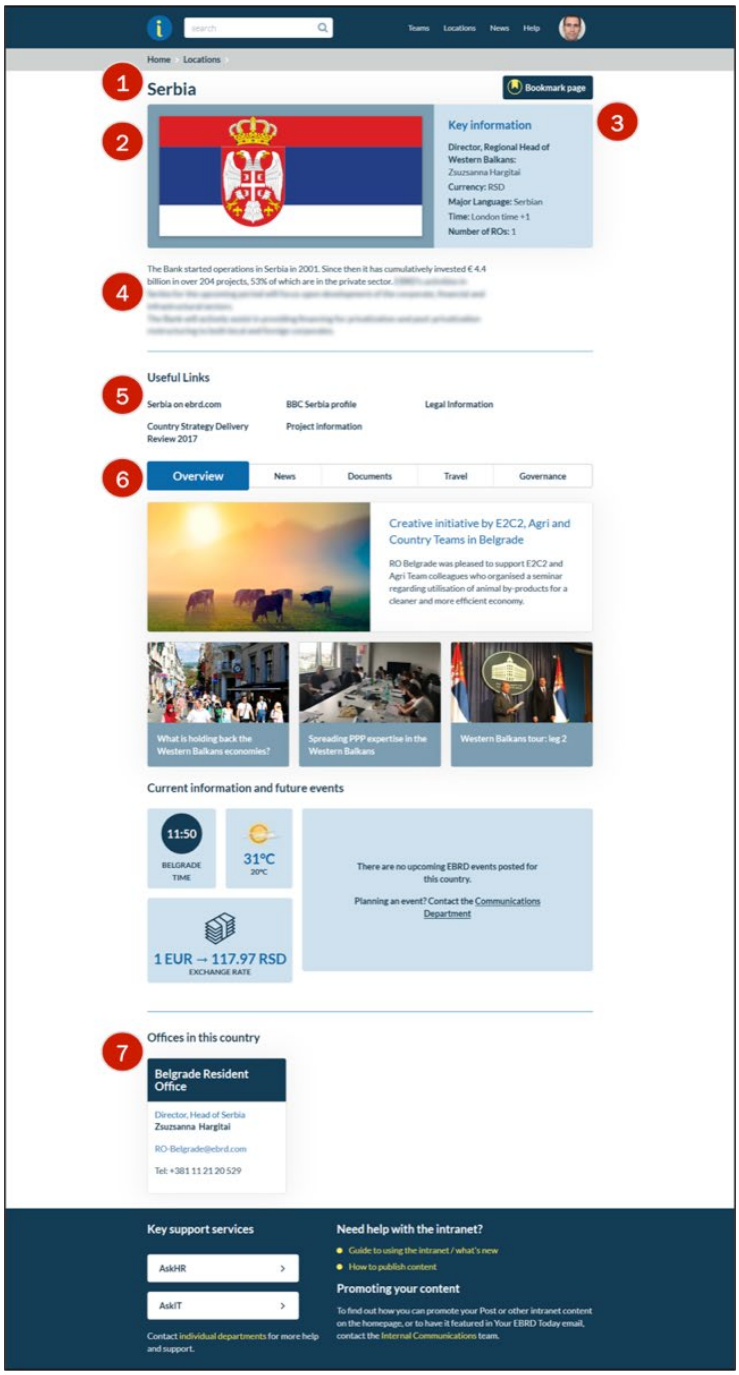
Pictured: EBRD Intranet Country List. The dozens of countries in which EBRD staff work are listed on the *Locations* page.

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



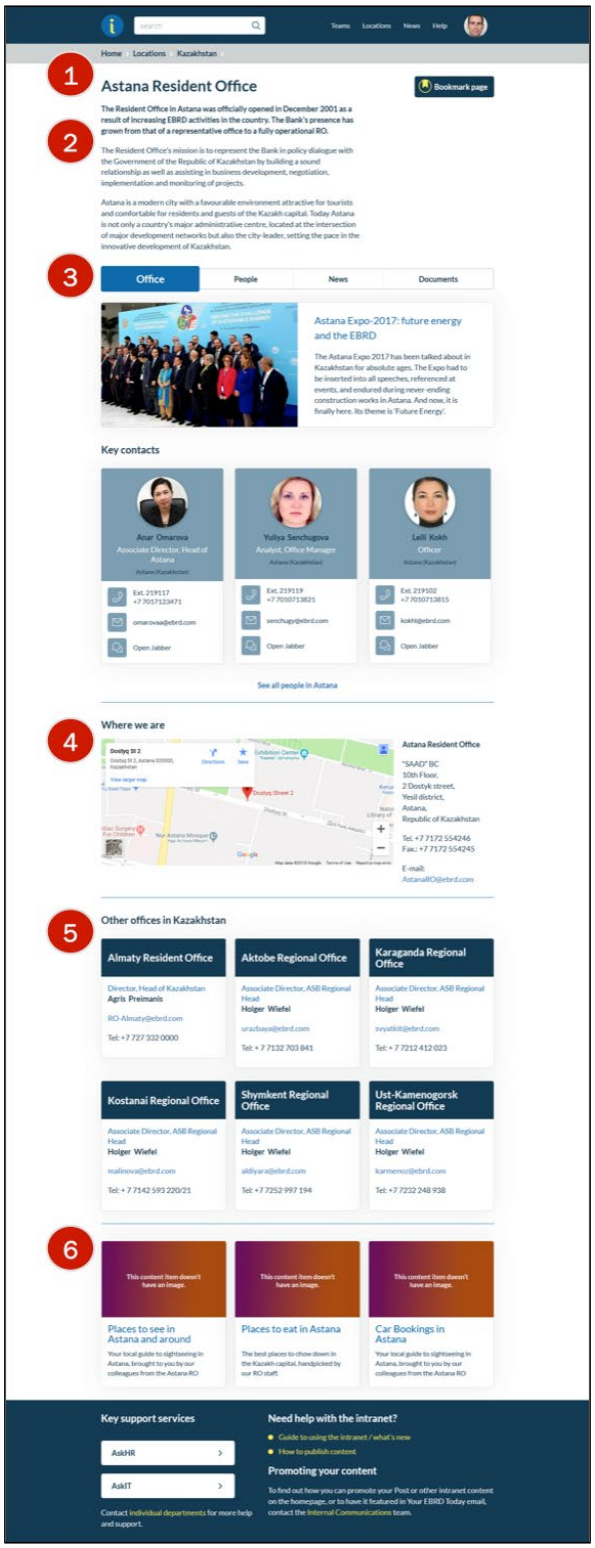
Pictured: EBRD Intranet Country Pages. Country pages include key information and are helpful for coworkers visiting that location.

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 mangers, 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

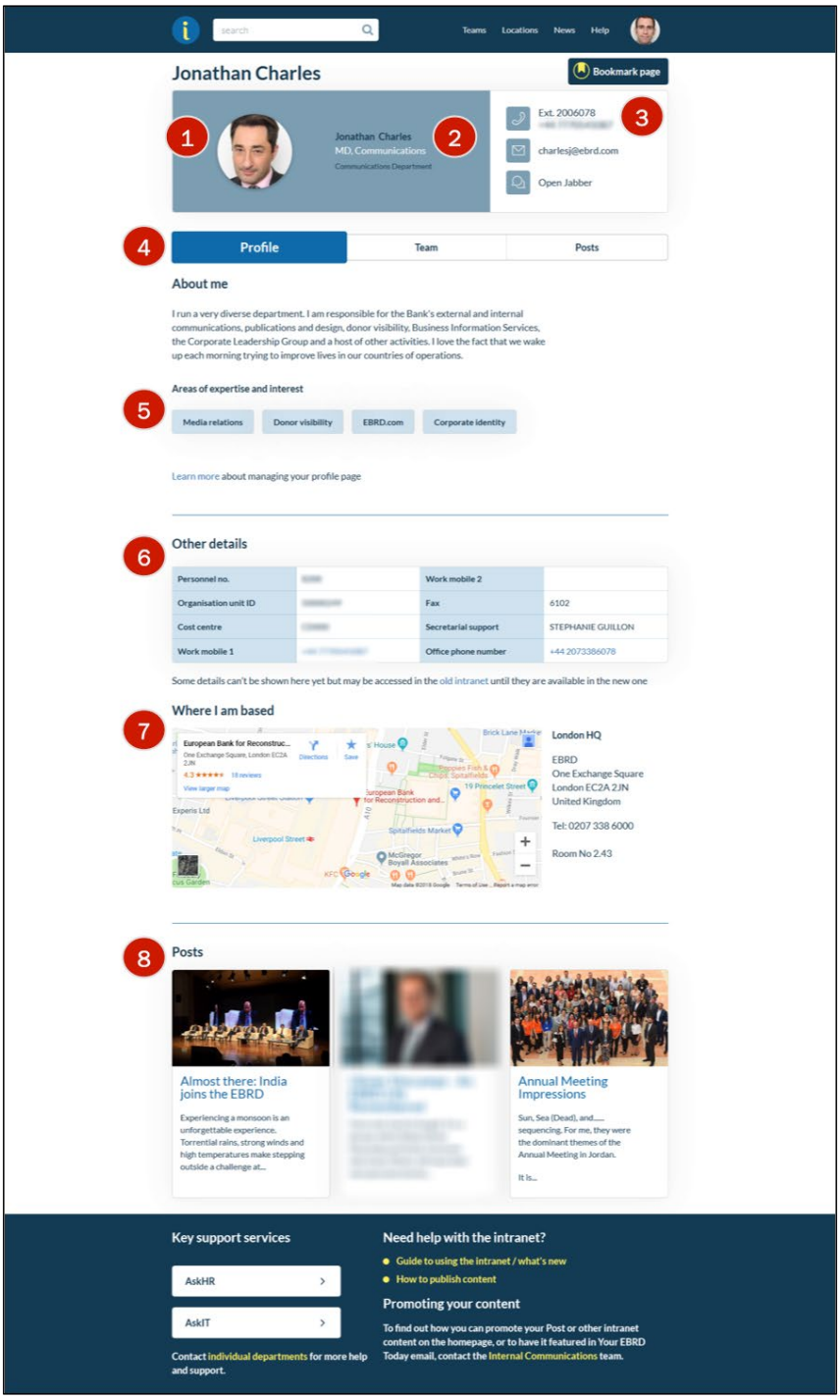
Pictured: EBRD Intranet Office Pages. Office pages are similar to country pages and provide pertinent information about various offices.

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



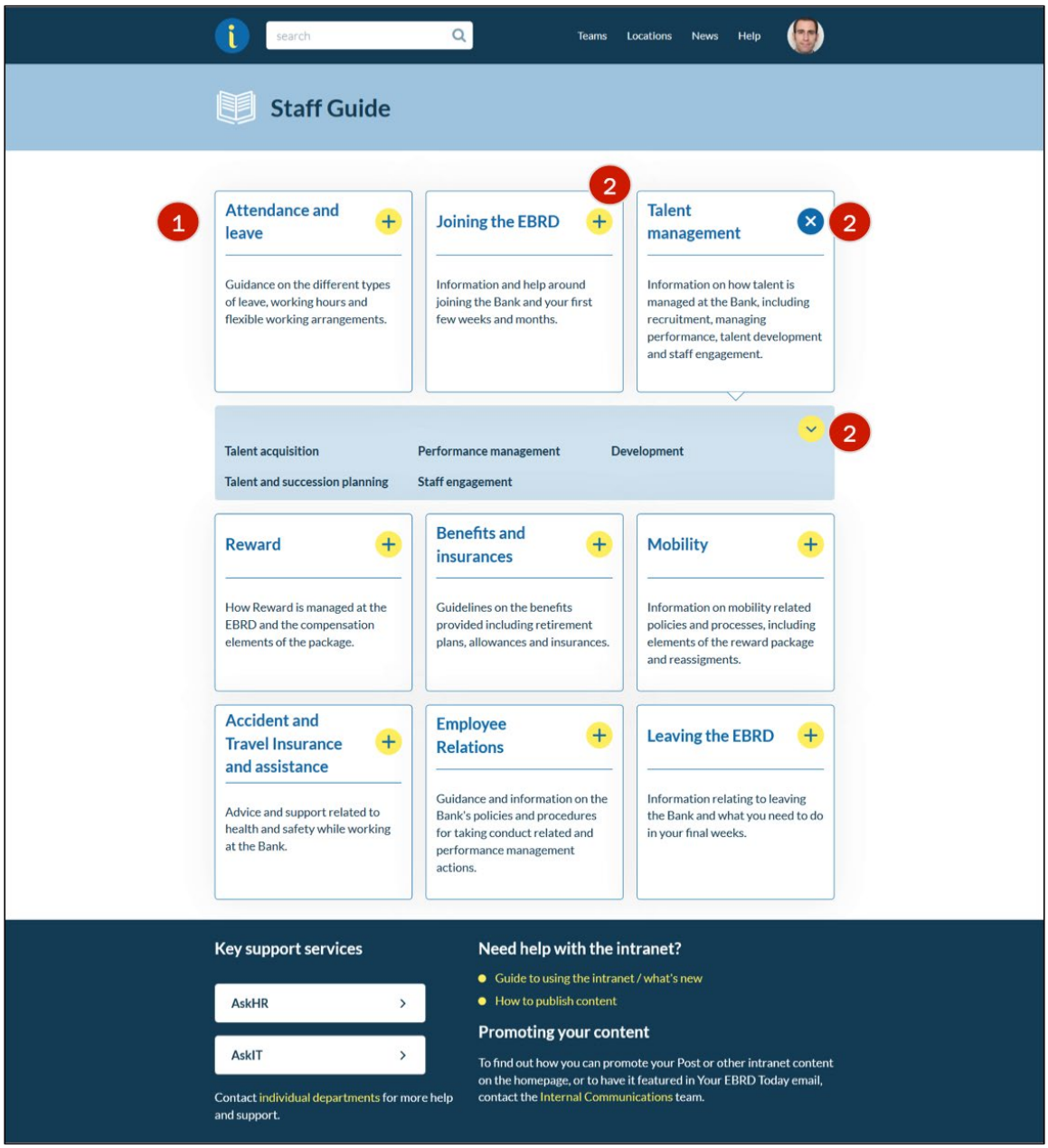
Pictured: EBRD Intranet Profile Page. Employee profile pages help employees learn about one another.

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 hierarchal 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.

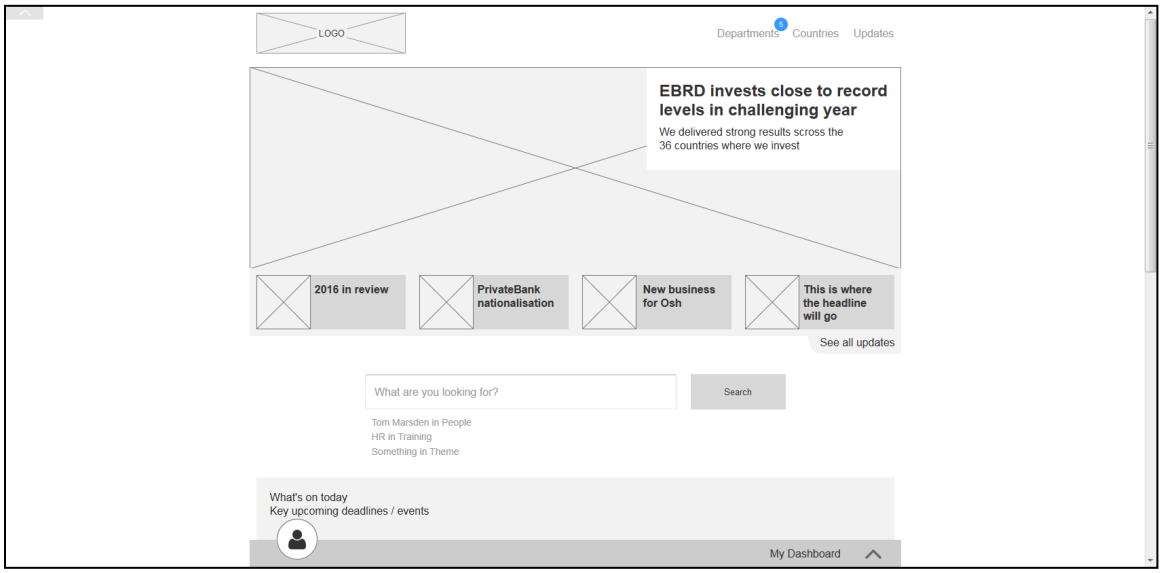
Navigation Menu Approach

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.

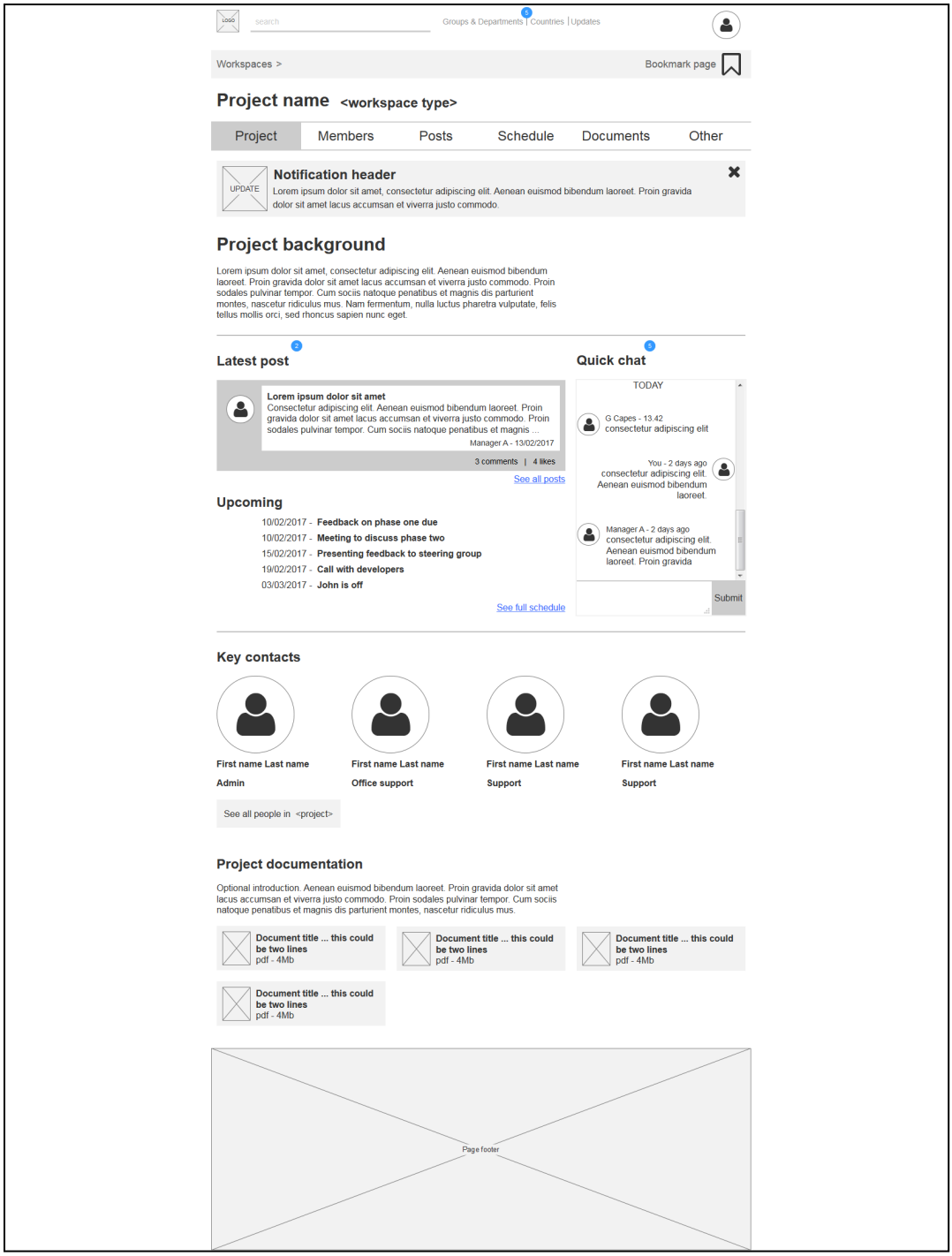
Although many companies use megamenus effectively, the EBRD team felt that having too many links in a global nav would deter staff from getting familiar with the new intranet and using its search facility. It also felt that a megamenu approach would lead users to become too dependent on idiosyncratic 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

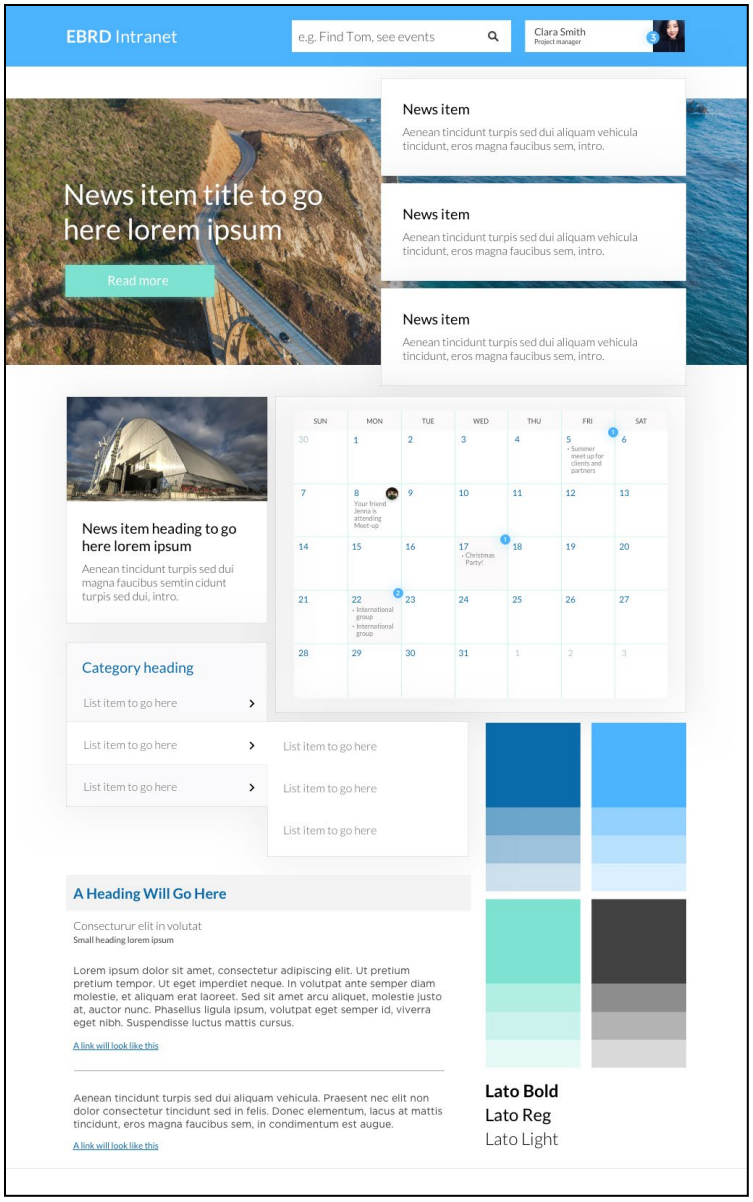
into its new structure and simplified approach. So, the new design's ultra-simple navigation was another purposeful step away from the old approach.



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 *Staff Guide*—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 *How useful was this information?* 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.

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, Javascipt, 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."

Bank Spółdzielczy we Wschowie (2019)

OVERVIEW

COMPANY

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

Headquarters: Wschowa, Poland

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

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

Annual revenue: N/A

THE INTRANET

Users: 250

Mobile approach: None

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

TEAM

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

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

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

INTRANET TEAM



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

HIGHLIGHTS ABOUT THIS WINNER

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

- **Designed and developed for the bank's true processes:** The team researched the bank's already-implemented processes and then systematically created elements to digitally support those processes. By defining the concepts of 1) the service, 2) the customer, 3) the user, and 4) the service owner, the team was able to design an intranet that provided the business with the best possible services.
- **Designed internally:** While external consultants and third-party software tools can improve projects, this team decided to keep all the design and development in-house. Most of the applications described in this case study are proprietary, created at the bank based on the employees' needs. One of the greatest benefits the organization and intranet team have realized from the choice to design and develop internally is complete control. During tool creation and through subsequent updates, the team proved it has the knowledge, resources, and flexibility to achieve its far-reaching goals.
- **Communication:** With alerts shown on global navigation menus, news, and updated app content, the intranet is a reliable medium for communicating with employees at all 22 bank branches.
- **Countless applications:** The intranet supports sundry applications that employees use for their jobs. These applications cover everything from core banking tools to document circulation and everything in between.

- **Reuse of information:** Rather than reinventing the wheel in service of ever-evolving bank procedures and creating applications that employees need to support them, the intranet team learned from the body of existing information and apps. In doing so, it was able to reuse and combine features and information, and did so whenever possible. For example, it reused an end-user software app that allows versioning of business-relevant files and publishes those files in one place so employees can use them as a template. In another example, the team used the List of Procedures application (which gathers all procedures used in each department) to show only procedures pertinent to the logged-in user, based on his or her department. This application not only makes it easier to train new employees so they understand what to do (such as in the event of an emergency) but—from an operations perspective—it also provides the intranet team with the knowledge it needs to combine procedures. The team can also use the application to create an overall system report to share with bank leadership.
- **Integration with important tools:** Users can use the intranet to perform tasks in other tools, such as creating tasks in Microsoft Outlook, getting reminders about upcoming tasks, giving updates to managers about their employees' tasks, and making hands-free telephone calls. HelpDesk support staff can run a chat session in the intranet using Cisco Jabber in the background. The team selected the most impactful apps to integrate, so employees can do common tasks all in one place and not have to switch between tools.
- **Imaginative niceties:** Creative features—such as the ability to search within a document without opening it, search within a table's column, and batch print multiple documents—make the intranet flexible and help employees remain in control.
- **Consistent visual design and branding:** Like the bank's public-facing website, the intranet uses the Oxygen regular and Oxygen light typefaces, and a combination of dark red, green, and grey on a white or light-grey background.

BACKGROUND

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

The core idea driving the intranet project was to streamline business processes, which would then translate into specific financial gains for the organization. The team charged with bringing this vision to life determined on day one that the best way to accomplish this goal would be to develop a custom solution and to hand-code it themselves, using open source tools. This decision had many upsides. It would give team members the ability to create a visual design without compromise. They could also decide where and how to arrange design elements for optimal use. And they could develop a solution whose code they would own forever. But all of that

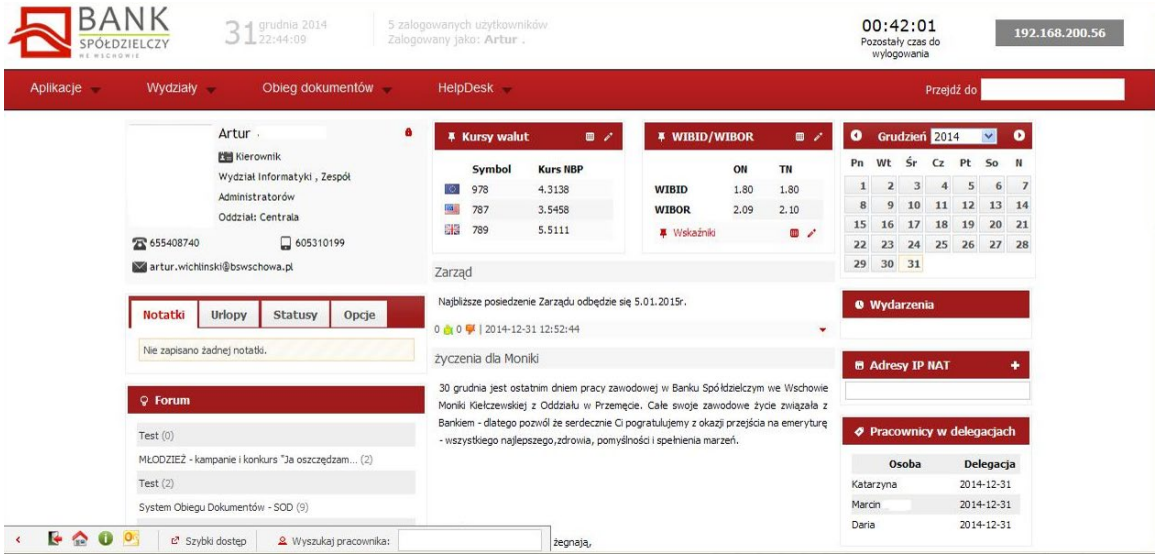
specificity and customization would come at a price and require a high level of human resources to make it happen. And yet, for this team's money (and time), the approach's good far outweighed the bad, so it forged ahead.

Challenges

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

- **Communication is not always easy:** Communication between business and IT has always been difficult, but to make this project work, employees at headquarters and in the IT department had to find effective ways to work together and bridge the communication gap that existed between them.
- **Custom isn't easy:** When the intranet project began, there were no tools in the bank that would support the types of internal communication services the organization needed. Given this blank slate environment, the team felt that the best way forward was through a custom solution, but the resources and budget needed to undertake such a project are incomparable compared to simply adopting an off-the-shelf platform. Regardless, the team committed to creating the new company intranet without any support from external suppliers. It also committed to providing applications and solutions at the highest level of quality, despite the fact that neither the team nor the bank were large organizations with resources to spare.
- **It takes grit and determination:** The IT team behind this custom platform was small—just three developers and eight engineers—but their level of determination was mighty. They didn't let their size hold them back from delivering a great product.
- **Support must come from above:** Bank Spoldzielczy we Wschowie is 70 years old, and its leaders possess the wisdom of elder statesmen. It is not, however, an institution stuck in the past. In fact, the bank's culture is grounded in a foundation of innovation, and the IT team leveraged that wisdom and took advantage of its forward-facing momentum.

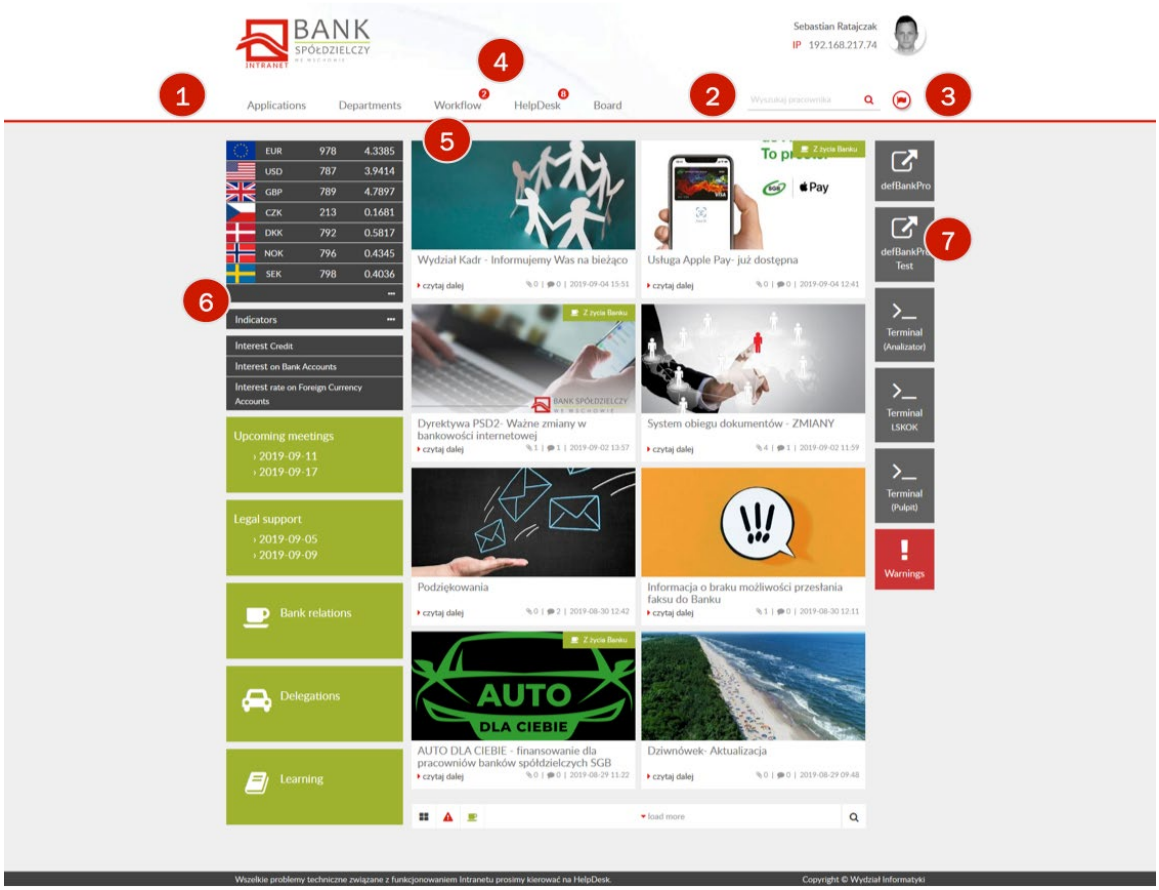
The team's willingness to take on these challenges paid off. The new intranet is not only the bank's primary internal communication platform, it is also a collection of web applications that allows employees to find all the information they need—all in one place—in a manner that is organization-specific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



Pictured: Bank Spółdzielczy we Wschowie's Previous Intranet. The previous version of the intranet homepage.

DESIGN REVIEW

Homepage

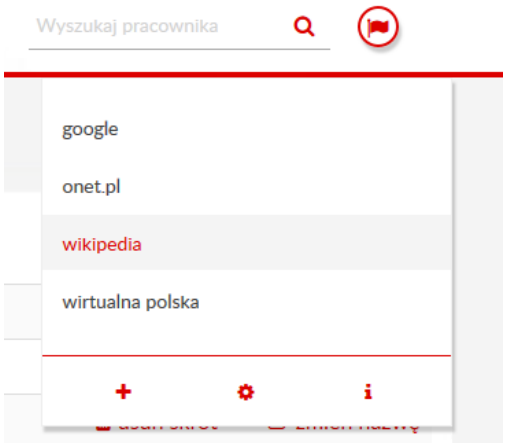


Pictured: Bank Spółdzielczy we Wschowie Intranet Homepage. The new homepage makes it possible for users to access the numerous applications they need for their work.

Homepage Highlights

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

1. **Global navigation:** The global navigation menu spans the top of the homepage and all other intranet pages. Although light grey text is not always the most legible, in this case it works because of the clear type, bolding, size, and the light page background color. The red line below the navigation helps it to further stand out as a static area on all pages. Creating the top-level structure in an IA, and then building the global navigation, is one of the most difficult intranet design tasks. The team pulled through in this case with top-level terms—*applications, departments, workflow, helpdesk,* and *board*—that are different enough from one another that users can make informed choices about which one to click.
2. **Search:** The site's search field is always present to the right of the global navigation menu, and is neither collapsed nor hidden. This allows employees who know a term they are looking for to easily search rather than browse.
3. **Quick access:** A flag icon, to the right of the search field, appears on all intranet pages. With this, employees can find shortcuts to websites that are useful for their work. The image below shows what it looks like when the flag icon is clicked:



4. **Updates:** Numbered red dots show how many documents the user has yet to read in that section. Blue dots indicate documents that the user is already working on. If the user had both unread and in-progress documents both red and blue dots appear (see below). This design choice helps employees keep track of when and where there is new information they may need.

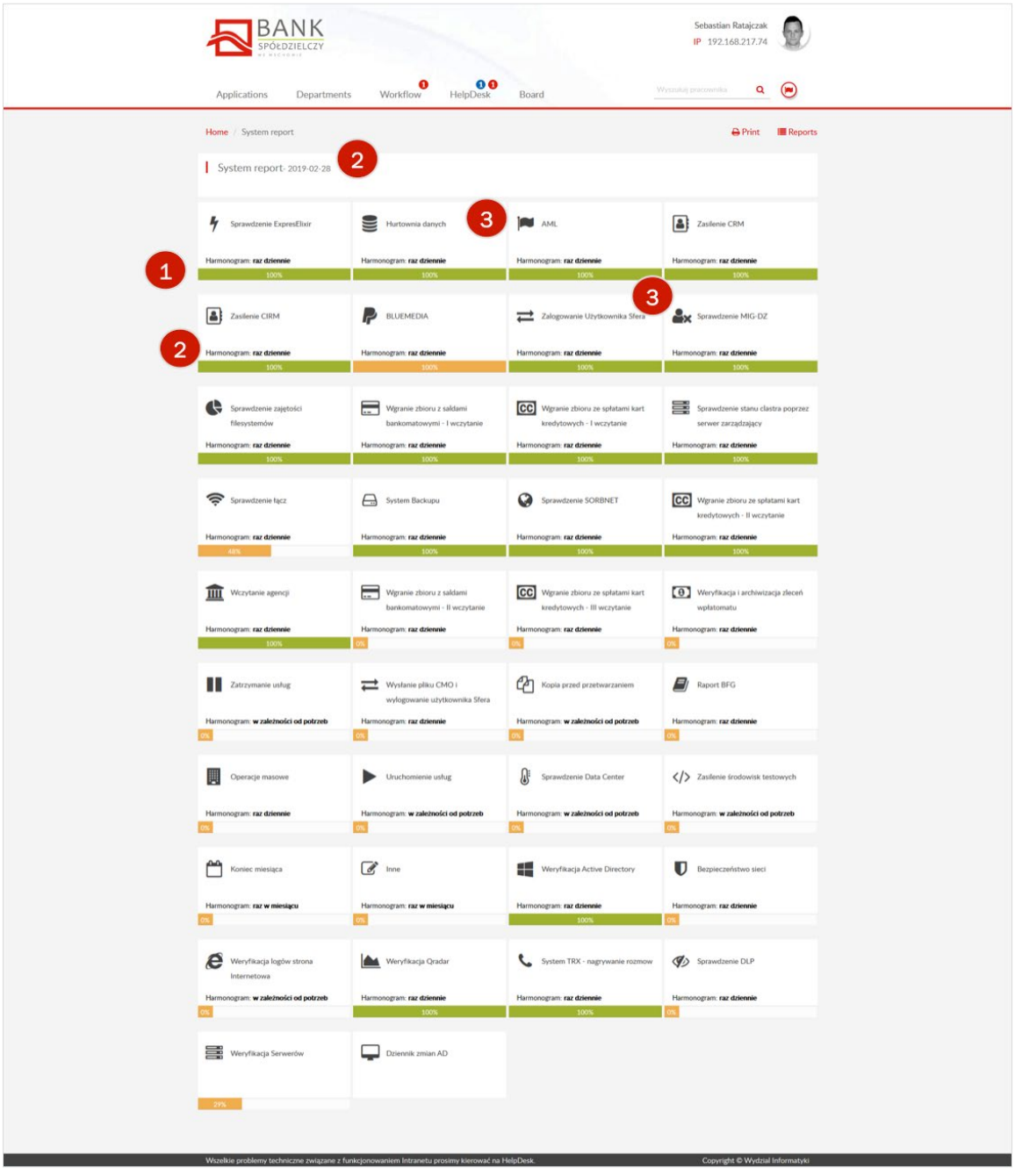


5. **News:** Top news stories appear in the homepage's main content section. Each story appears in a card with an image and title, icons that indicate the

number of photos available with the story, and the number of comments received next to the date and time.

6. **Left rail:** Various current information appears down the left rail of the page, including currency exchange rates and meeting dates. Toward the bottom, cards link to important apps.
7. **Tools list:** A set of icons arranged vertically down the right side of the homepage provides logged-in users links to their most commonly used applications. These links are provided automatically based on the user's role.

Integration with Applications



Pictured: Bank Spółdzielczy we Wschowie Intranet Applications Integration. Application usage is tracked in an application designed for this purpose.

Integration with Applications Highlights

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

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

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

1. **Applications reporting:** The *system report* app displays a card for each application, with a horizontal barometer chart and a percentage indicating how well the app is performing.
2. **Time period:** In this daily report, each graph shows all the events that occurred within the previous 24 hours. The date is indicated at the top of the page. The label *harmonogram: raz dziennie* (literally translated as *schedule: once a day*) communicates this.
3. **Core applications:** The application name and an associated icon appear at the top of each card. *Hurtownia danych* (*data warehouse*) and *zalogowanie uzytkownika sfera* (*user login sphere*) are just some of the core banking applications included in this report and the bank's digital workplace. Each of these apps was created in-house and is accessible from the intranet's *Applications* menu. Other applications linked to from the intranet include the following:
    - Credit risk assessment: for client evaluation
    - Data warehouse reports
    - Reports platform: employees enter data without using Excel sheets for reporting to headquarters, and Head Office employees receive ready-made statements from the intranet
    - Internal controls with full reporting for the controlling unit
    - Monitoring and reporting of settlements between banks
    - Bank risk department
    - OPERISK: registers and analyzes risk
    - ATM monitoring: informs service staff about how to credit the device with cash and how to settle it

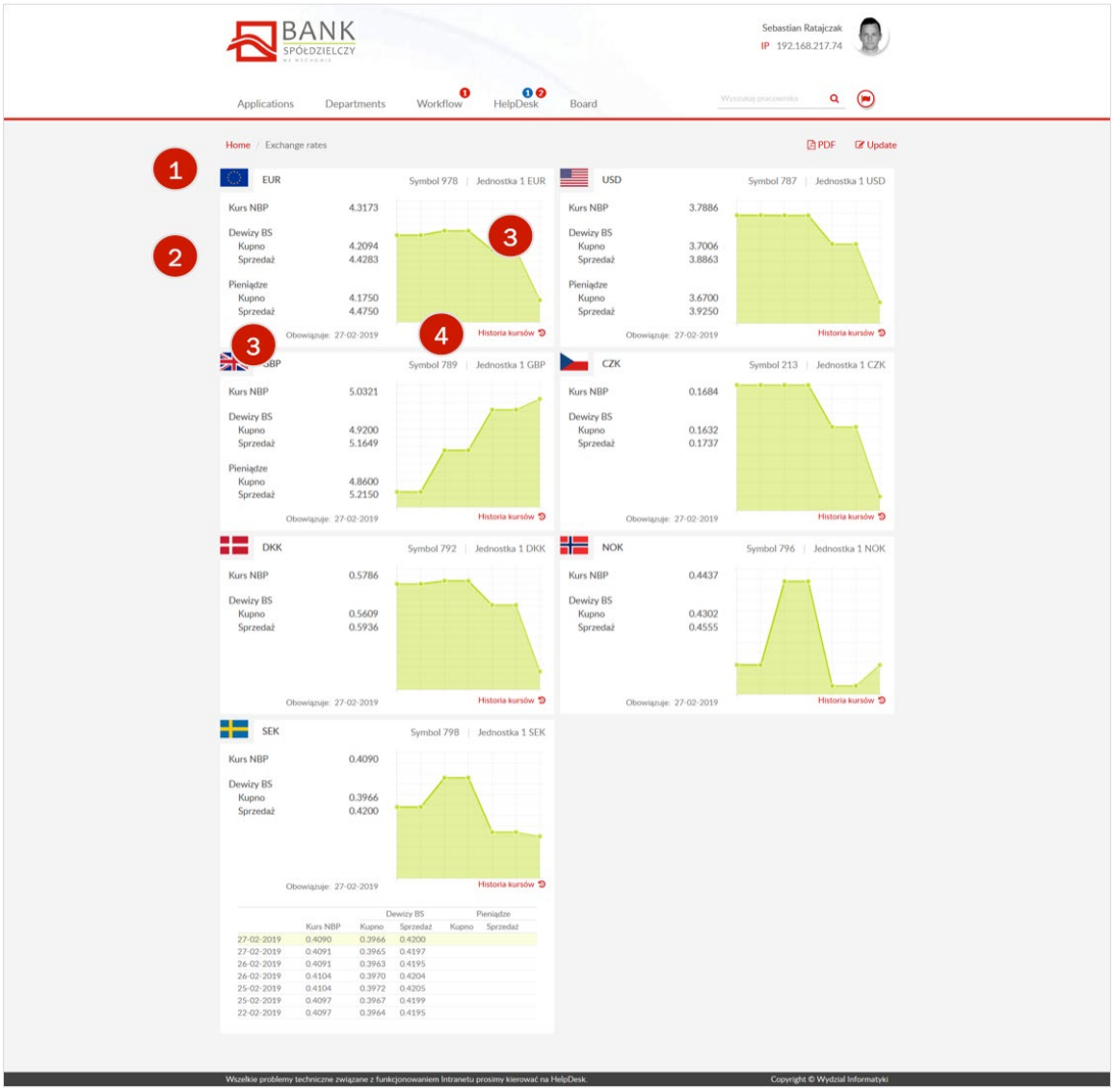
    Additional support applications include:

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

- Data protection and data security: a set of applications to help improve the work of bank security officers
- Register of contracts: lists contracts concluded by particular departments of the bank's Head Office with external entities
- Ordering system for internal orders
- HelpDesk
- Employee database
- Intern and apprentice database
- Employee benefits
- Training
- Incident register: lets employees register security policy violations
- Register of consents for making an image available on the intranet
- Early warning system for security threats
- Customers' requests for sharing personal data
- Personal data disclosure
- Office of the Management Board: handles general matters related to the Management Board
- Collection of links needed to administer the bank's data center
- Electronic version changes system: a set of tools that supports the work of the IT system administrator and system owner in strict alignment with GDPR and Polish Financial Supervision Authority requirements
- Data quality book: manages the quality of data in bank applications
- List of procedures: gathers all procedures used in each department
- List of all paper documents
- Collection of all applications used in the bank, including next releases of patches and new versions; IT can run the entire process of testing changes and introducing them into the production environment

- End-user software: publishes versions of business-relevant files in one place so that employees can use them as a template
- Human resources
- Business trip plans
- Car booking
- Vacation requests: Active Directory allows for automatic time blocking
- Training: manages internal, external, and e-learning training

Exchange Rates



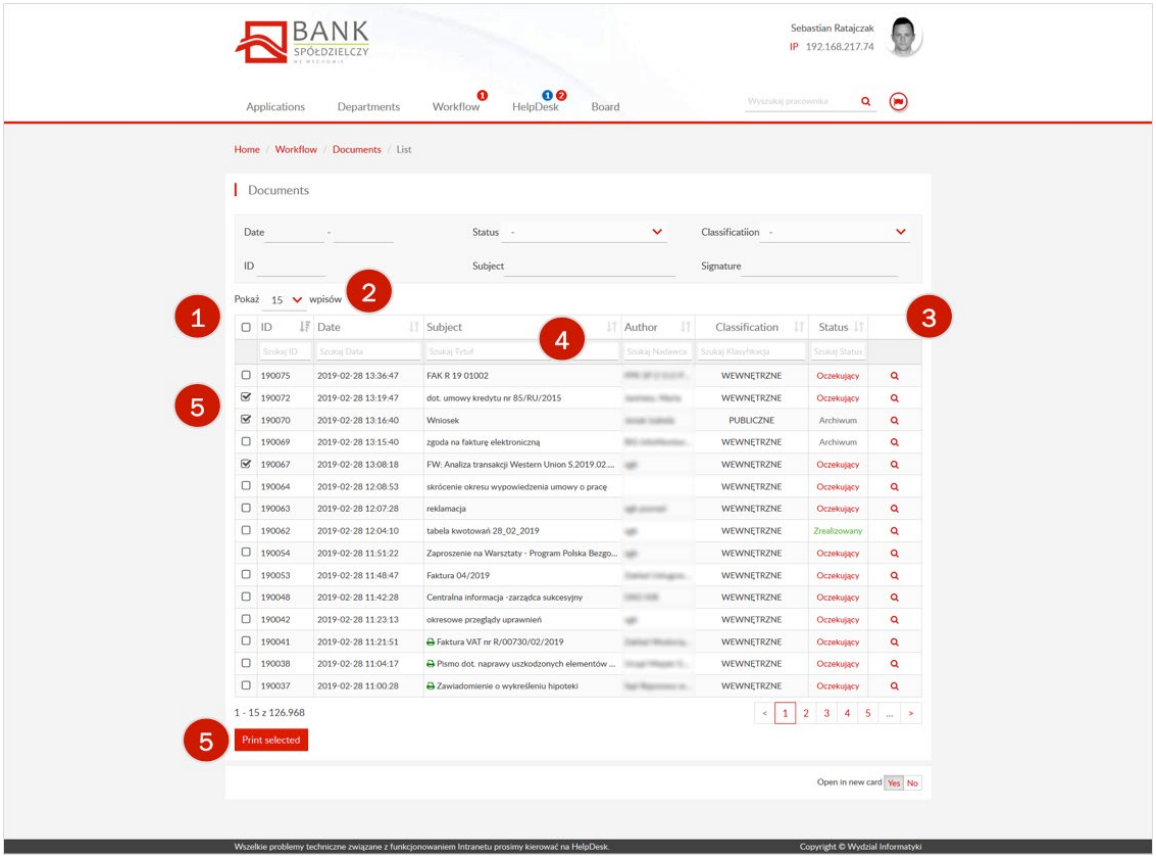
Pictured: Bank Spółdzielczy we Wschowie Intranet Exchange Rates.
This shows exchange rate charts for currencies with which the bank often deals.

Exchange Rates Highlights

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

1. **Identifiers:** Each currency is identified by the abbreviation for its name, as well as the related country or region's flag. Both the text and the icon help employees to quickly recognize and recall the currency.
2. **Prices:** The latest purchase and sale prices appear in a table to the left of the chart.
3. **Day:** The prices are for the current day, which is listed below the table.
4. **History:** A history link below the chart leads to options to view different time periods.

Information (Document) Workflow



Pictured: Bank Spółdzielczy we Wschowie Intranet Information (Document) Workflow. The team embedded helpful workflow functionality for many kinds of documents and forms.

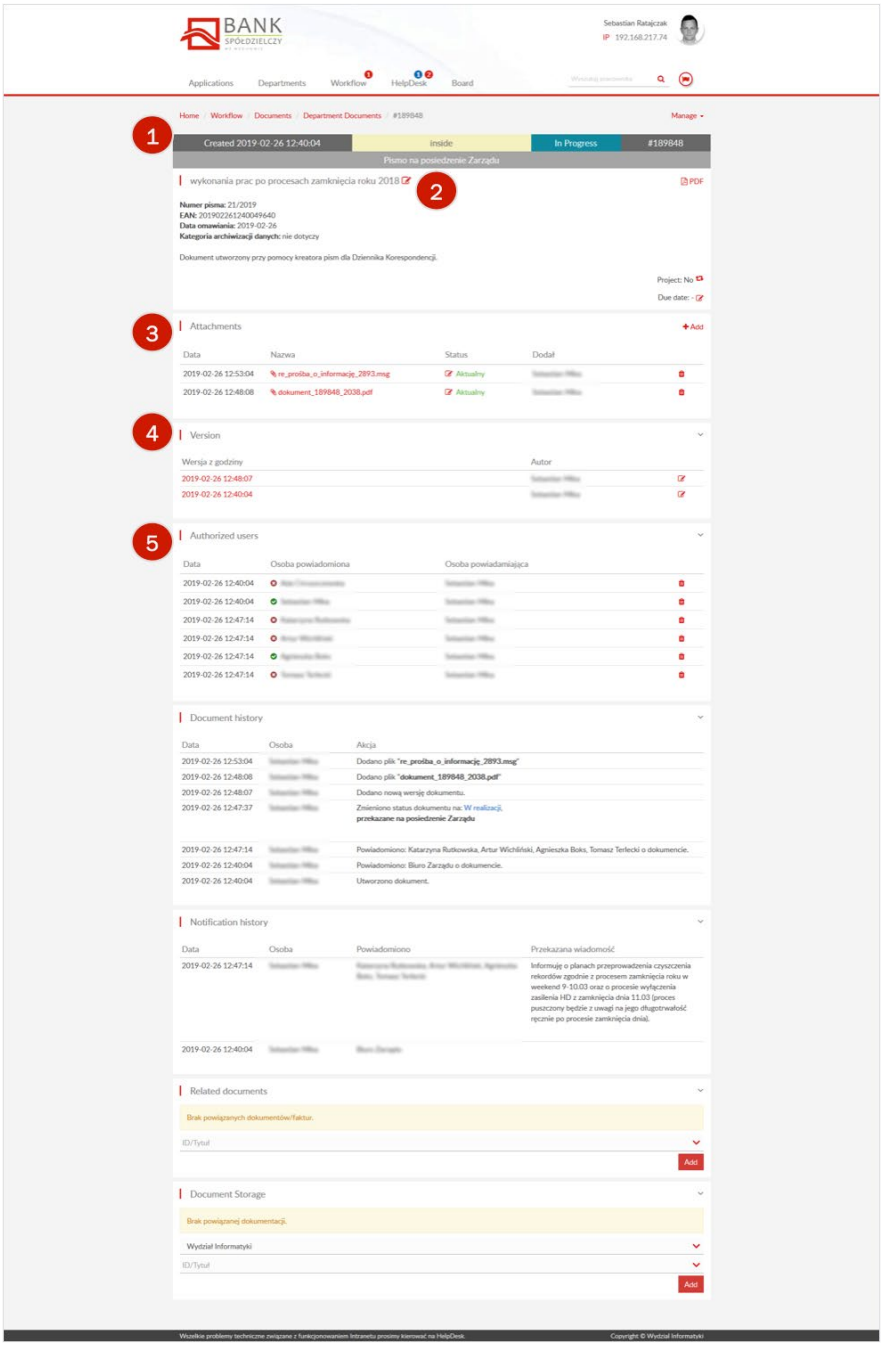
Information (Document) Workflow Highlights

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

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

1. **Filter:** Users can filter the list of all documents based on metadata, including the document's date, ID, author, and more.
2. **Show number of entries:** A simple drop-down at the top of the table allows users to choose how many items they want to show. This gives employees control and flexibility.
3. **Identifying information:** The top row of table cells includes categories of information that help employees identify the document they want. These elements include: document ID, date, subject, author, classification, and status.
4. **Sorting and searching:** An interesting context-driven search enables users to search by topic. Each search field below the main topic area cell allows users to search for items only in that column. This behavior is communicated in the UI based on the search field's position, close to the title, as well as the prompt text within each search field, which reads, for example, *Search ID* in the *ID* column. Employees can also sort the table by any of the columns simply by using the arrow icon on the right side of each cell.
5. **Print:** Employees can check the checkbox to the left of each item then click the *Print selected* button at the bottom of the page to print.

Document Within Workflow



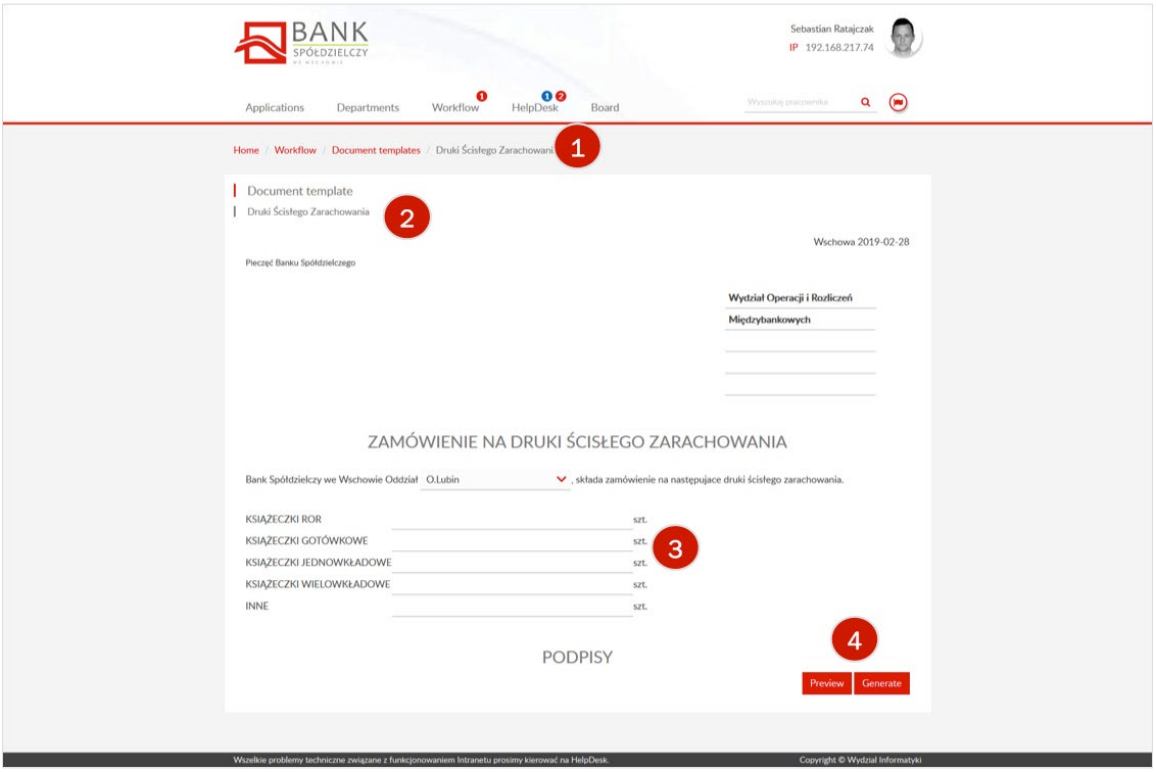
Pictured: Bank Spółdzielczy we Wschowie Intranet Document within Workflow. Opening a document in the workflow application displays all the information related to the document, including authors, edits, and attachments.

Document Within Workflow Highlights

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

1. **Summary and status:** Colored bars at the top of each document provide the most rudimentary information: when the document was created, to whom it's available, its status, and the document number. A grey bar below the summary tells users what type of document it is. In the example shown here, it is: *pismo na posiedzenie zarzadu* (translated literally, *letter to the board meeting*).
2. **Basics:** Basic information about the document appears in the first section. The name, such as *wykonania prac procesach zamkniecia roku 2018* (translated literally, *performance of work in the closing processes of 2018*), appears at the top. Next comes other information, such as date of discussion, barcode (EAN), and archive category.
3. **Attachments:** Related attachments appear in the *Attachments* section and can be opened from here.
4. **Versions:** Users can track the history in the *Version* section, which shows the date and time of the most recent edits and the author of those edits.
5. **Other Details:** Other sections in the document include more information about its authors and history.

Document Template



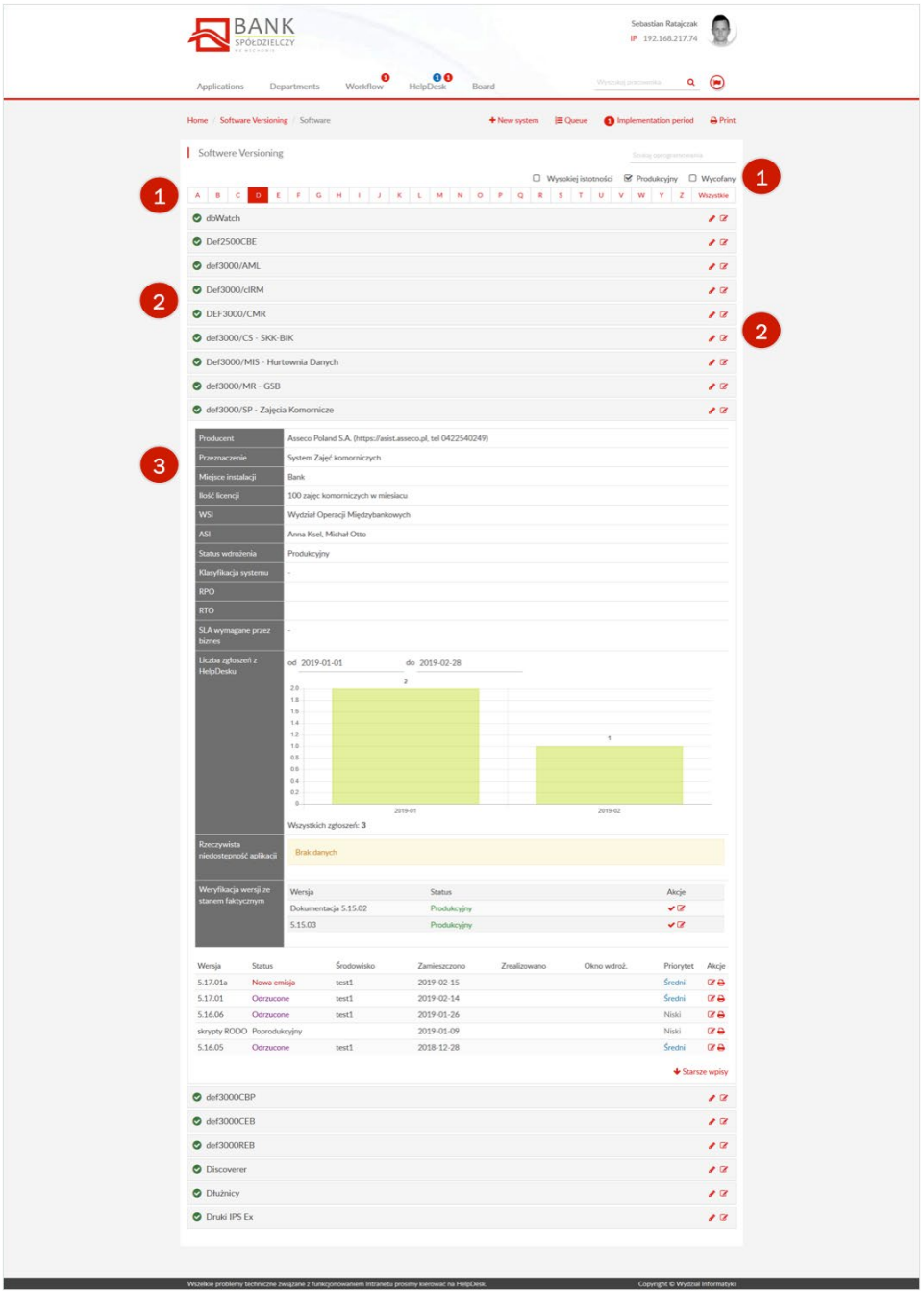
Pictured: Bank Spółdzielczy we Wschowie Intranet Document Template. The template for creating a document uses progressive disclosure, hiding sections so that it appears short and simple until sections are needed.

Document Template Highlights

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

1. **Templates:** Templates are found in the *Document templates* section of the *Workflow* application, as seen in the breadcrumb.
2. **Type:** The name of the document type, such as *druki scislego zarachowania* (translated literally, *strict accounting prints)*
3. **Fields:** Simple fields allow users to fill in the document template and create a thorough document.
4. **Finish:** Buttons allow employees to preview the document before creating it, and then allow them to create it.

Software Versioning Tracking



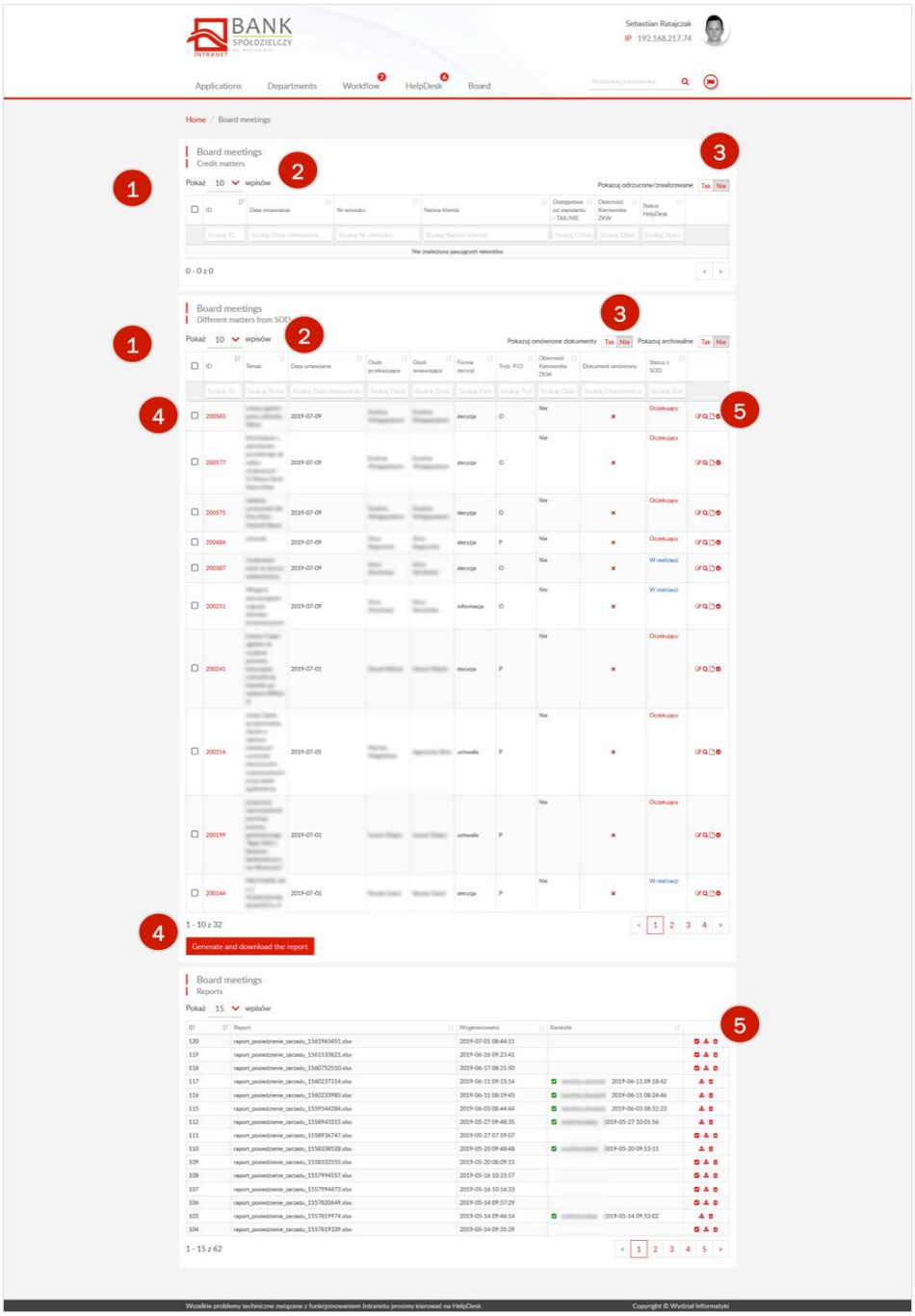
Pictured: Bank Spółdzielczy we Wschowie Intranet. The intranet's many applications are tracked, communicated about, and kept up to date via a software versioning application.

Software Version Tracking Highlights

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

1. **Filters:** Given the volume of bank applications, the team made the list of them easier to scan by providing an alphabetical listing filter at the top, as well as checkboxes to show only documents that are highly relevant (*wysokiej istotnosci*), in production (*produkcyjny*), and no longer in use (*wycofany*).
2. **App list:** Each application is named in the list, with its details collapsed. Hiding the details by default makes working with this long list possible. The icons on the far right of each row allow users to edit the app's name or the full description.
3. **Details:** Expanding an application's details reveals a great amount of information about that software and its use at the bank, including the manufacturer (*producent*), where it is installed (*miejsce instalacji*), number of licenses (*llosc licencji*), and the number of related HelpDesk requests (*liczba zgloszen z HelpDesku*).

Board Meeting Notes



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

Board Meeting Notes Highlights

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

1. **Summary tables:** The summary tables of topics discussed at the board meetings let users examine topics related to credit (first table) and topics related to everything else (second table).
2. **Change how many entries are displayed:** Users can choose how many entries they want to display from a drop-down list control at the top of each table.
3. **Display approved or denied:** Using the *Tak* (yes) / *Nie* (no) toggle above and to the right of each table, users can choose to display the approved or rejected items discussed by the Board of Directors.
4. **Create and download:** Employees can download reports that include only the topics in which they are interested by using the checkboxes in the leftmost table column. Clicking the *Generate and download the report* button below the table creates and downloads the report.
5. **Multiple actions:** The rightmost column of each table includes icons that represent actions that employees can take on each item in the table. These include edit, search within the document, open, approve, download, and delete. Only those users who have rights to execute these actions see the related icons.

DESIGN PROCESS

Keep Users at the Center of the Process

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

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

Quality Communication Feeds Product Quality

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

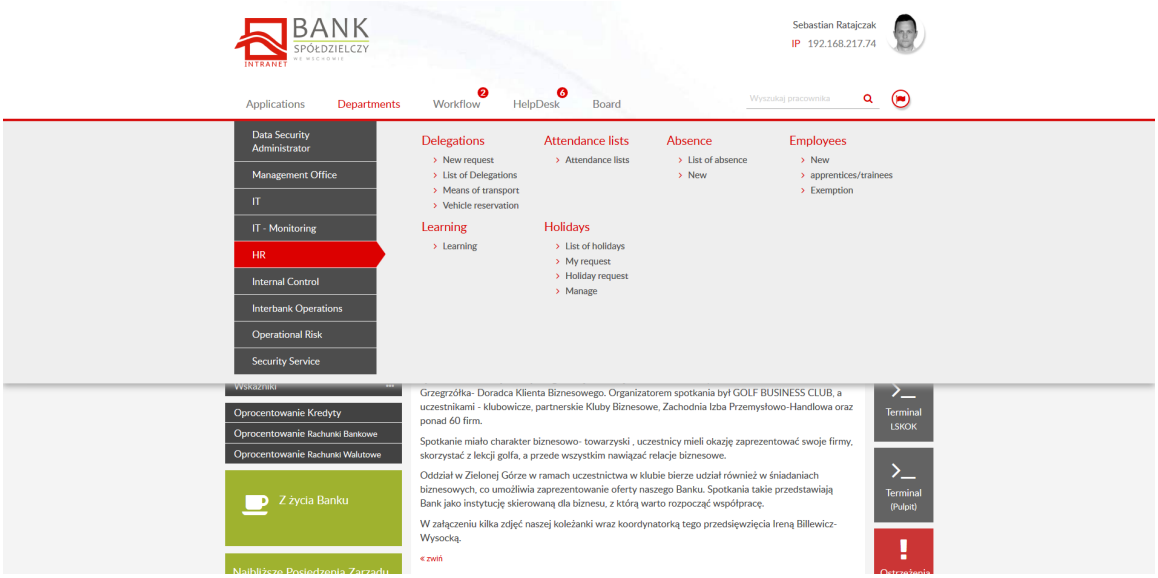
Adoption/Buy-In

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

Once users engaged with the platform, they began to appreciate how the new system helps improve their work lives. Achieving even these incremental gains,

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

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



Pictured: Bank Spółdzielczy we Wschowie Intranet Main Navigation. This shows the intranet's main navigation menu with links organized by category.

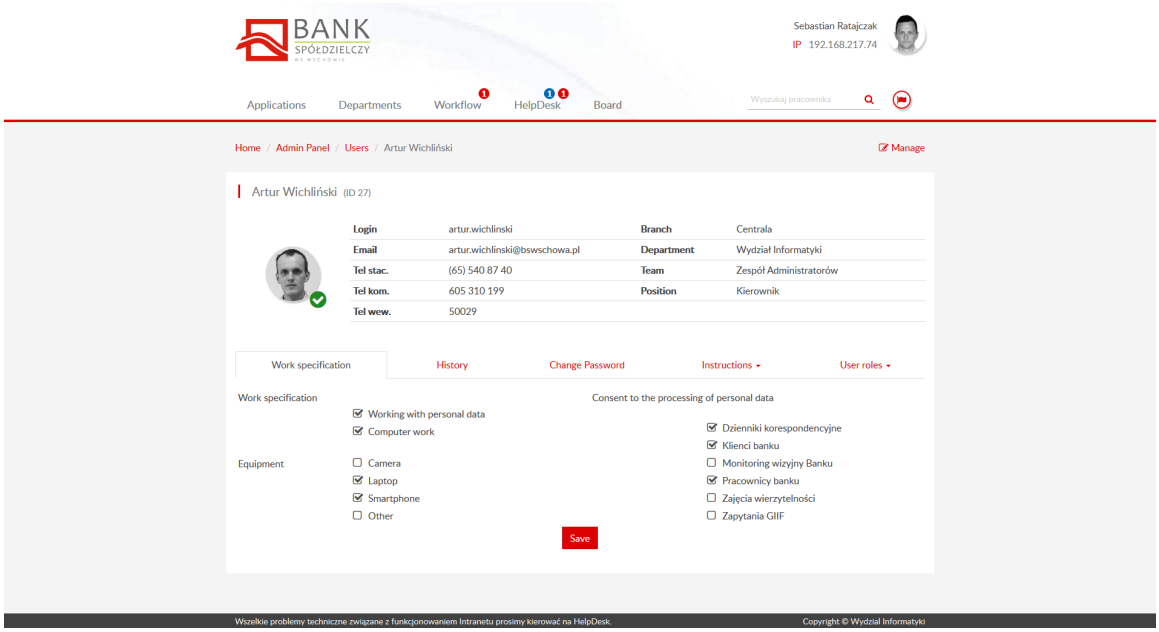
GOVERNANCE

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

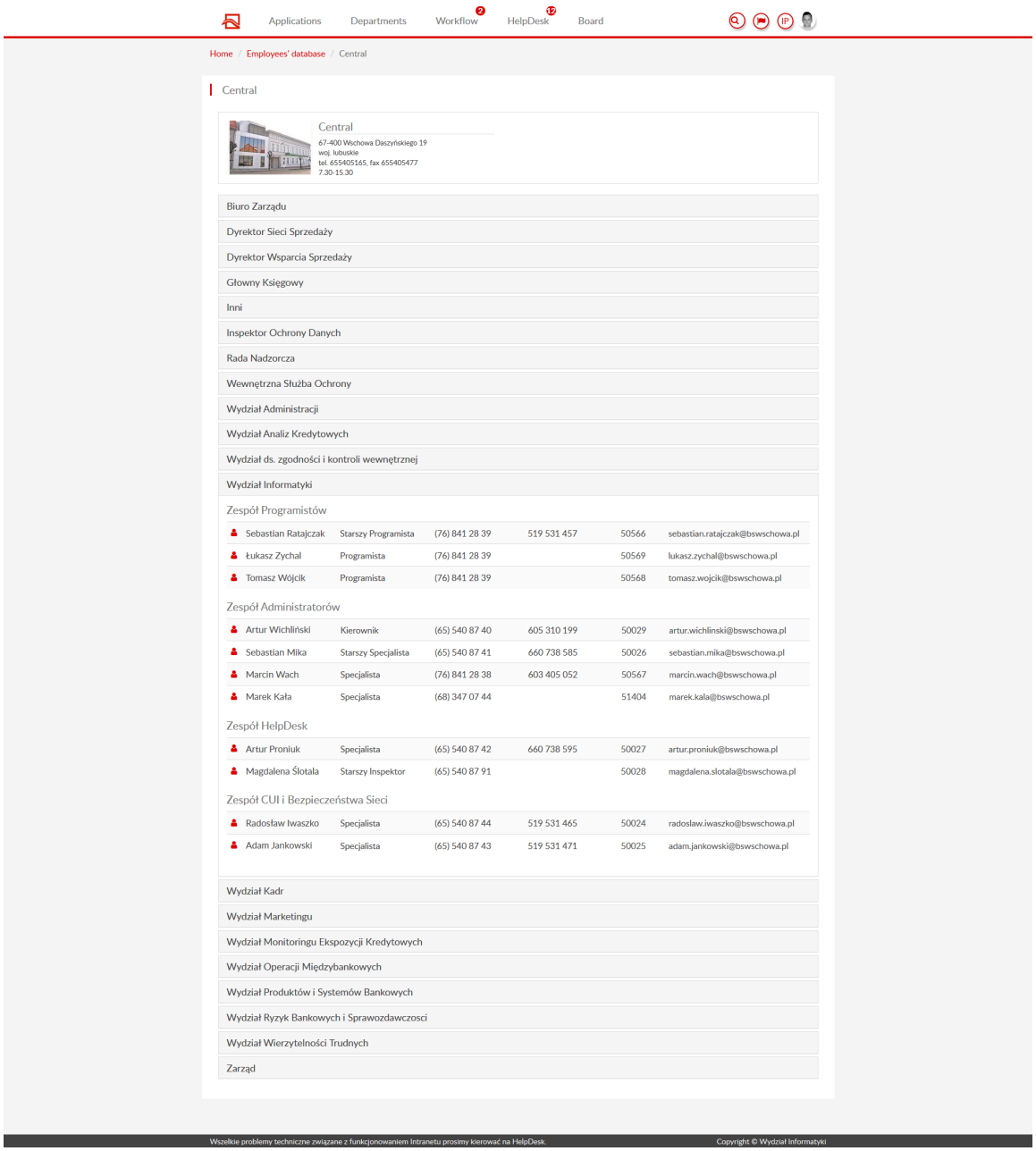
Every three months, the bank's management is informed about any new functionality that will appear on the platform. The bank's central office participates in platform development by contributing in monthly meetings. Application ownership is sometimes a problem, but the IT team looks for compromises that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

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

User	• Work with applications • Create and publish intranet content • Track which published content has been read



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



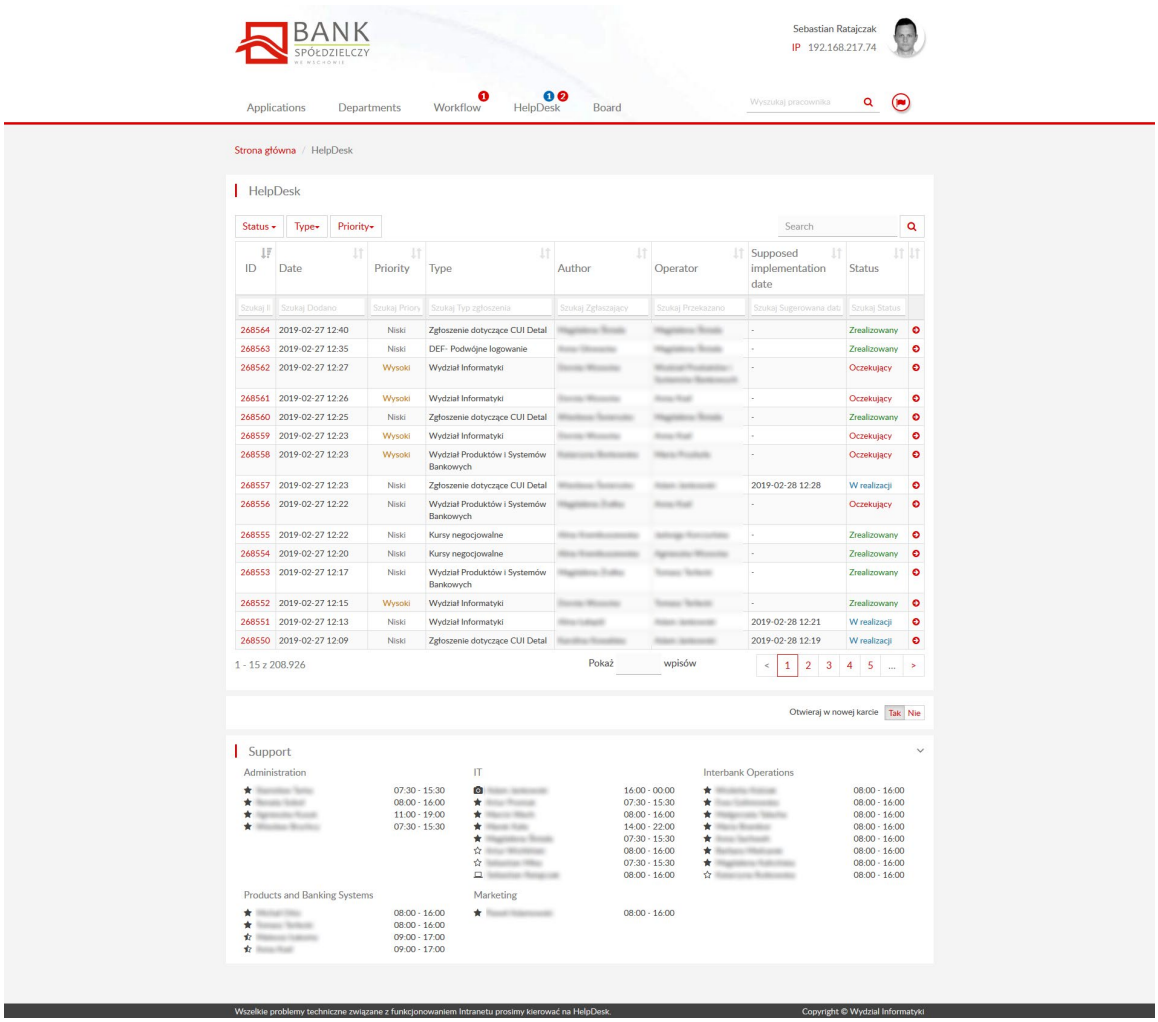
Pictured: Bank Spółdzielczy we Wschowie Intranet Employee Database. The employee database application contains contact information for all employees.

URL AND ACCESS

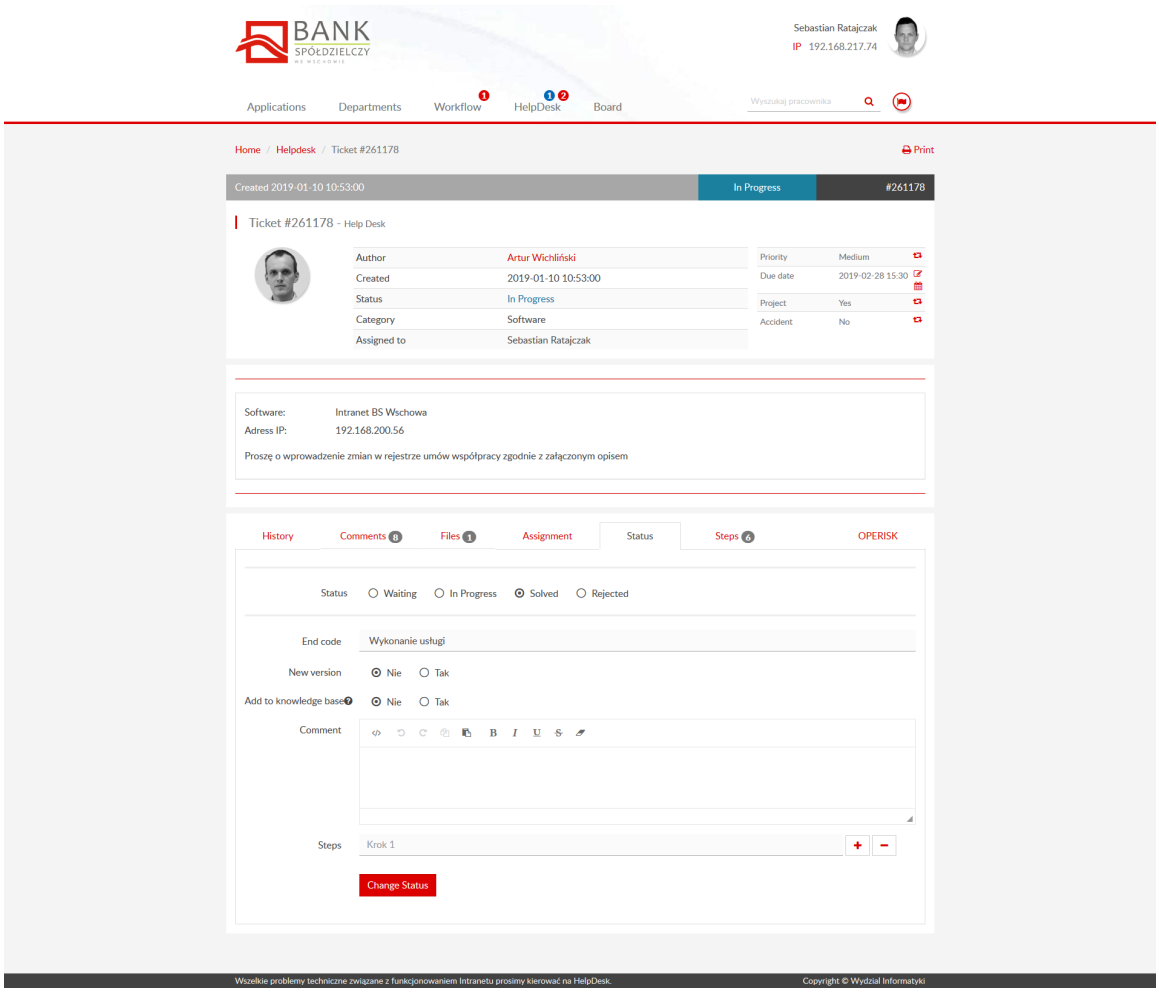
ACCESS INFORMATION	
Item	**Status**
URL	www.intranet.bswschowa.pl
Default Status	The intranet is set as the homepage in every user's browser; users cannot change this setting as it is controlled by Active Directory.
Remote Access	Users cannot access the intranet remotely. Administrators have remote access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

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
May 2005	• Idea for the creation of a new intranet
December 2005	• The first version of the intranet (for IT only)
2007	• Add new team members to project following staff departures • Begin HelpDesk development
2008	• Implement interior online shop • Create Document Circulation System • Add new developers to team
2008–2013	• Construct 60% of the applications that appear on (current) intranet
October 2013	• **Successfully measured first platform:** Awarded "Highest Quality Intranet" by Business Forum in Dziennik Gazeta Prawna
2014	• Add new developer team members following staff departures • Expand HelpDesk functionality • Launch intranet as a communication platform for bank employees
June 2014	• Award: "Support Leader 2014 Transformation" for Small Support Centers
2014–2015	• Adapt intranet platform to Financial Supervisory Commission requirements
June 2015	• Award: "Leader in Information Technology of Financial Institutions 2014" by Gazeta Bankowa, Back Office Systems category • Construct the Electronic Version Change System
March 2016	• Award: finalist for Computerworld's "Best Cloud Solution" for development of HelpDesk and integration with Orange (VoIP telephony)
2016	• Begin new intranet platform project
2016–2017	• Redesign portal front end
April 2017	• Launch current intranet
June 2019	• Award: Step Two Australia's Silver Award for "Building a Custom Digital Ecosystem"
Overall redesign timeframe: 2 years	



Pictured: Bank Spółdzielczy we Wschowie Intranet HelpDesk. This shows the dashboard view of the bank's HelpDesk ticket system.



Pictured: Bank Spółdzielczy we Wschowie Intranet HelpDesk Ticket View. The ticket view shows all information about the ticket and how the user manages the ticket process.

CONTENT AND CONTENT CONTRIBUTORS

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

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

TECHNOLOGY

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

Technology Approach

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

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

Spółdzielczy we Wschowie maintains its position as one of the largest cooperative banks in Poland.

SEARCH

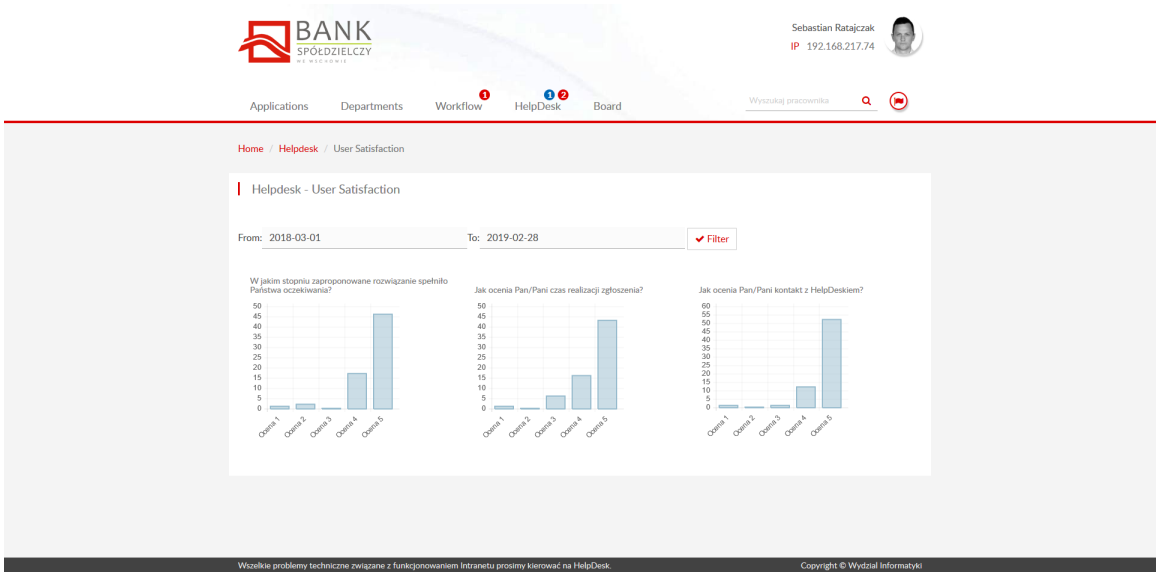
The bank's intranet doesn't have one main search. Currently, applications that store content have autonomous search engines and the team tries to match that level of detail depending on the business need. Search engines in applications are designed and made by the internal team, which doesn't use solutions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

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

ROI

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

- **Cost savings:** Using open source software and doing the work in-house translated into specific and measurable financial benefits for the organization. This approach meant it was not forced to buy commercial software, which is certainly not inexpensive at the enterprise level. This cost savings is also multiplied because, with a custom solution, there is no need to install additional software on individual workstations.
- **Data quality improvements:** These improvements are due to standardization, which has led to a decrease in the number of errors made by employees performing routine tasks that were once manual (and prone to error) and are now executed through the platform.
- **Benefits of a portal environment:** The portal environment provides employees with a digital workstation that gives them access to all necessary applications in one place and helps then perform their duties.
- **Intangible gains:** Some benefits are difficult to estimate, as is the case with the institutional knowledge gained through the development of a custom solution, which will pay off for years to come.



Pictured: Bank Spółdzielczy we Wschowie Intranet HelpDesk Satisfaction Report. This report from a HelpDesk user satisfaction survey illustrates how well the tool is serving employees' needs and shows a steady and rapid increase in satisfaction levels.

LESSONS LEARNED

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

- **Teamwork is what counts.** "We have learned that we are not alone, that teamwork is what counts. And we have learned to delegate tasks. We have gained knowledge on how to work on projects as well as how to test and document all changes. For the bank, the platform is primarily a tool that facilitates personnel management, business processes, and serves as an internal communication channel. Together this contributes to an essential aspect of the company culture: cooperation. It is one of the essential elements that has contributed to building a competitive advantage."
- **Pay meticulous attention to the requirements.** "While building the intranet, we were guided by good Information Technology Infrastructure Library (ITIL) best practices and our solutions were designed according to these. The intranet is a project we have been working on for several years and throughout that time we prepared a description of all the processes that we needed to implement, and then we systematically translated them into a digital form. At the beginning, we defined the idea behind the project and what it would provide, always keeping a focus on the customer, the user, and the owner of the service. Creating an accurate specification description of these elements has resulted in the most important outcome: providing the business with interesting and useful services."

- **Don’t be afraid of change.** “There is only one conclusion from the entire transformation process: one should not be afraid of change. Openness to what surrounds us is what allows us to create things that simplify our functioning in the work environment. Even when building small units you can achieve a lot and thus contribute to the better financial results of your company.”
- **Take the time to do it right—the first time.** “Many times we launched bad projects. The reason for this was because we were rushing, at the insistence of users. The users and business owner must define all aspects of the tool or project. They must define the parameters and those requirements can’t be changed during development. If you break this rule, then you’ll end up having to start over again when it fails and that’s discouraging.”

Barclays (2020)

OVERVIEW

COMPANY

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

Headquarters: Canary Wharf, London, UK

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

Barclays also has branches in 50 countries.

Locations where people use the intranet: All locations

Annual revenue: $28.2B in 2018

THE INTRANET

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

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

Mobile approach: iOS and Android apps

Technology platform: Custom built in-house

PROJECT TEAM

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

CURRENT TEAM

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

UX design: Lisa Adams, Suraj Naik

UI design: Anthony Clark, Kautuk Gajbi

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

Systems architects: Michael Lewis, Deron Blair, Sachin Pandey

Testing: Leena Shejekan, Suchitra Bajpai, Suraj Yadav

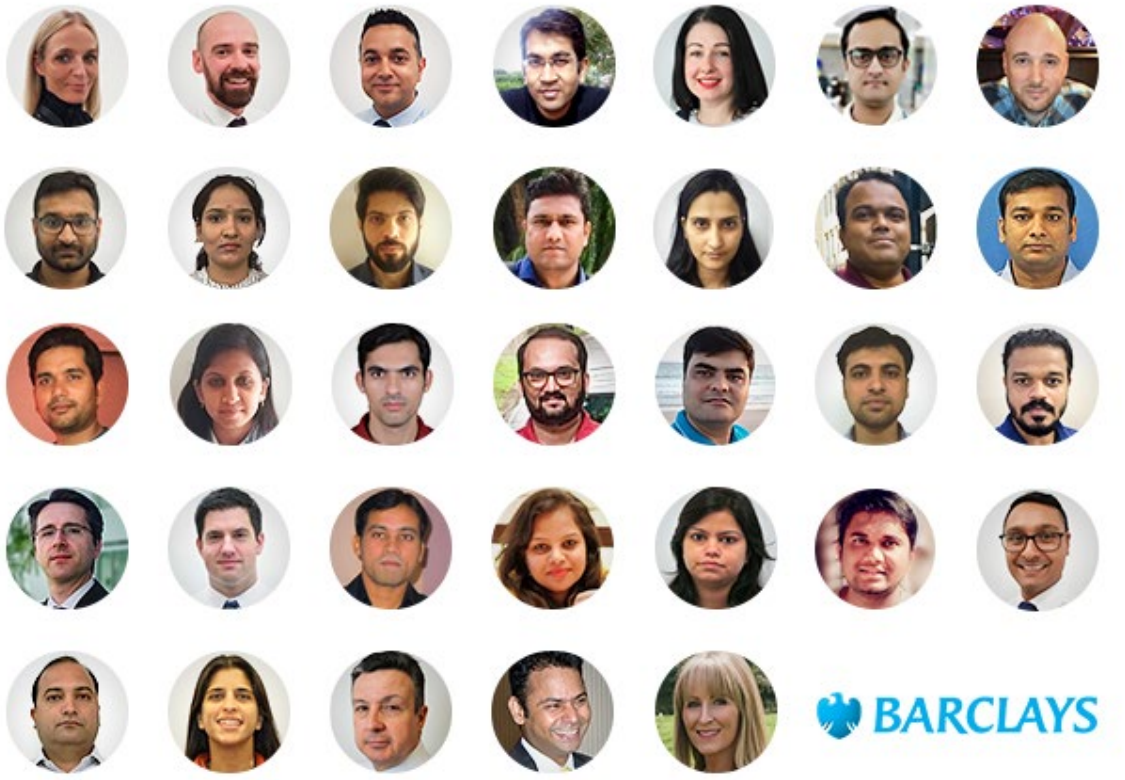
Business analysts: Rajendra Singh, Sourabh Patankar

Project management: Rachana Bhatia, Martin Peplow

Scrum master: Nitin Dubey

Executive assistant: Jenna Bristow

INTRANET TEAM



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

HIGHLIGHTS ABOUT THIS WINNER

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

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

- **Easy access to tools and site links:** Users can quickly access apps and sites on the homepage of both the desktop site and mobile app. These links are added based on the user's business unit or the selected topics.
- **Pleasant, usable visual design:** The visual design of each page communicates a carefully considered hierarchy. Text size, color, whitespace, and section dividers make pages easy to scan. The most important information is displayed at the top of the page. Clickable items appear clickable, with strong signifiers such as bolded text or—gasp—underlined links. Barclays Now gracefully walks a line between minimalism and clarity. The mobile app visual design follows suit, with small amounts of information and minimalist design on each screen.
- **Targeted news:** News is curated so that employees see what's relevant to them, based on their role, location, and their own customizations.
- **To Do:** Each user's to-do list is easy to access and manage; this makes it more likely that users will see action items and stay current on procedures.
- **Collaboration tools:** Employees from around the world can participate in communities with colleagues who are like-minded—about work- or social-related topics—to communicate, help one another, and feel more connected. Finding communities is easy using recommendations and search features. Users can also collaborate via one-on-one instant messages and group chat. These tools on Barclays Now are especially helpful for employees who work in bank branches and do not have access to email.
- **Growing the intranet:** The DCE team included information on the intranet that describes its process and how stakeholders can work with the team to improve the intranet, add features and information, and drive traffic to their content. The simplicity of the information combined with the welcoming language and understandable steps surely coax interested colleagues to participate.
- **Simple global navigation:** The site's IA informs an understandable global navigation, with descriptive terms, obvious hierarchy, and intuitive visual selections.
- **Responsive design and a mobile app:** User research greatly informed the mobile app's design in terms of which content to include and how to present features. Creating the responsive website, in addition to the mobile app, was only partially motivated by the need to support mobile use; it was also driven by the needs of desktop users, who often have multiple side-by-side windows open simultaneously and thus also need the content to flow based on screen size.

BACKGROUND

In 2016, Barclays' management team developed a four-point strategy for the organization. One of these strategy goals was to address "the rapid digitization of banking," as Barclays was shifting from being a traditional bank to a more digitized

organization at that time. The banking industry as a whole was also developing more of an online presence as customers were increasingly doing their banking online. So, the DCE team was tasked with delivering an intranet and mobile app that were fit for the modern workforce and would better serve the needs of the bank's employees.

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

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

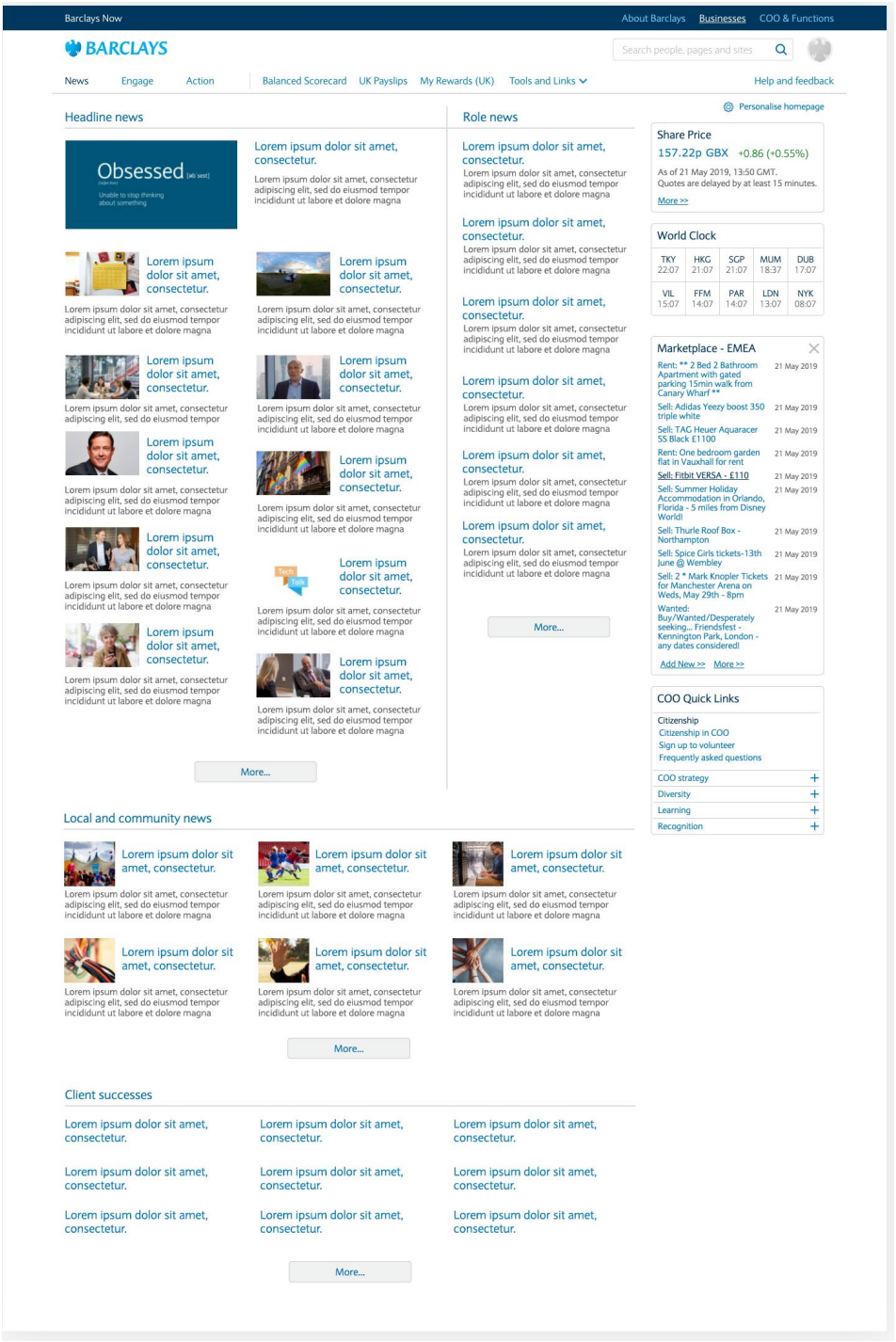
Challenges

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

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

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

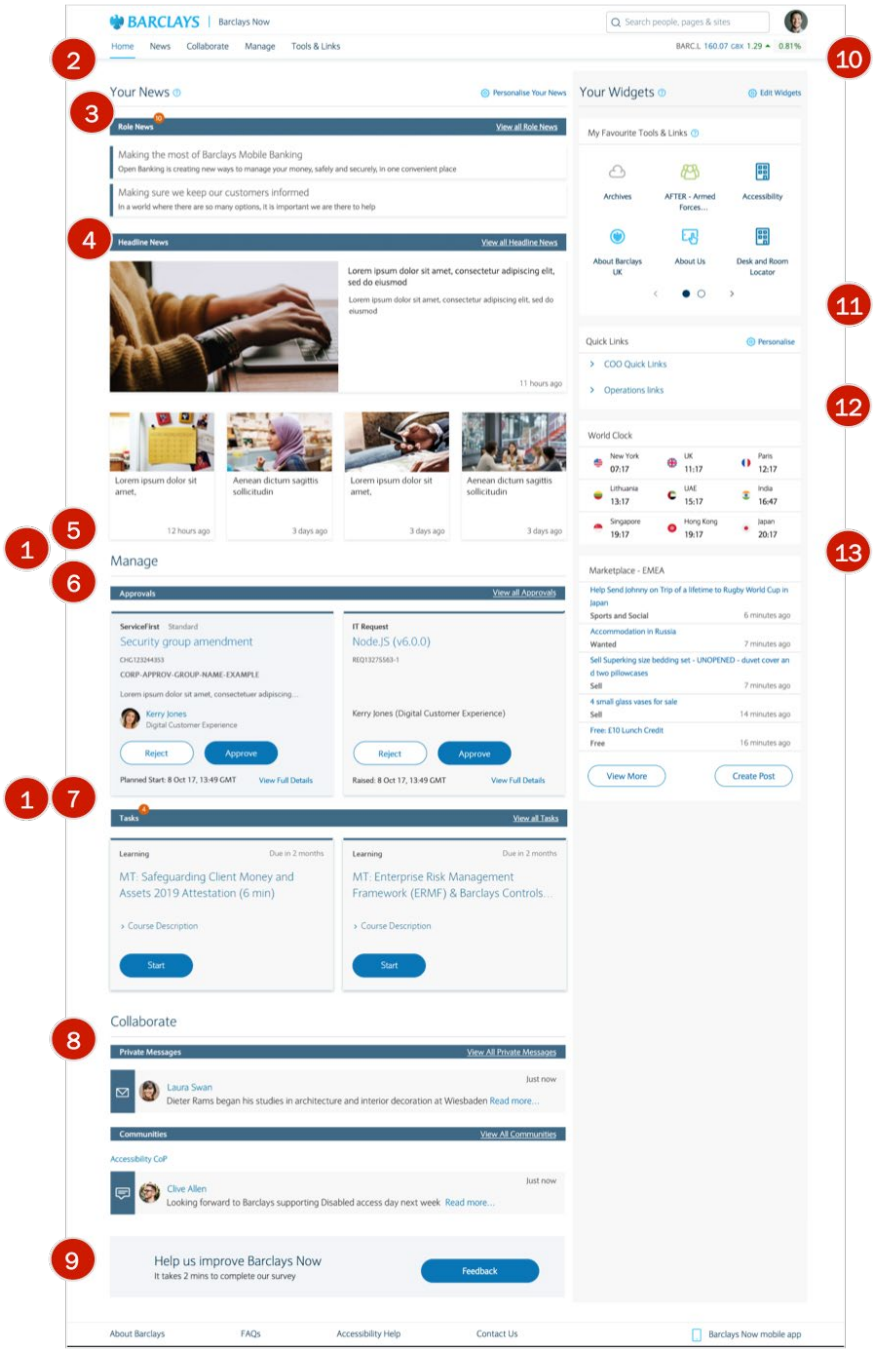
- **Time-poor test participants:** Usability testing was challenging as colleagues are busy and were not incentivized to participate. Some agreed to participate and accepted an appointment time, only to cancel at the last minute. Although happy and motivated to participate, many had higher priority things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



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

DESIGN REVIEW

Homepage



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

Homepage Highlights

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

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

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

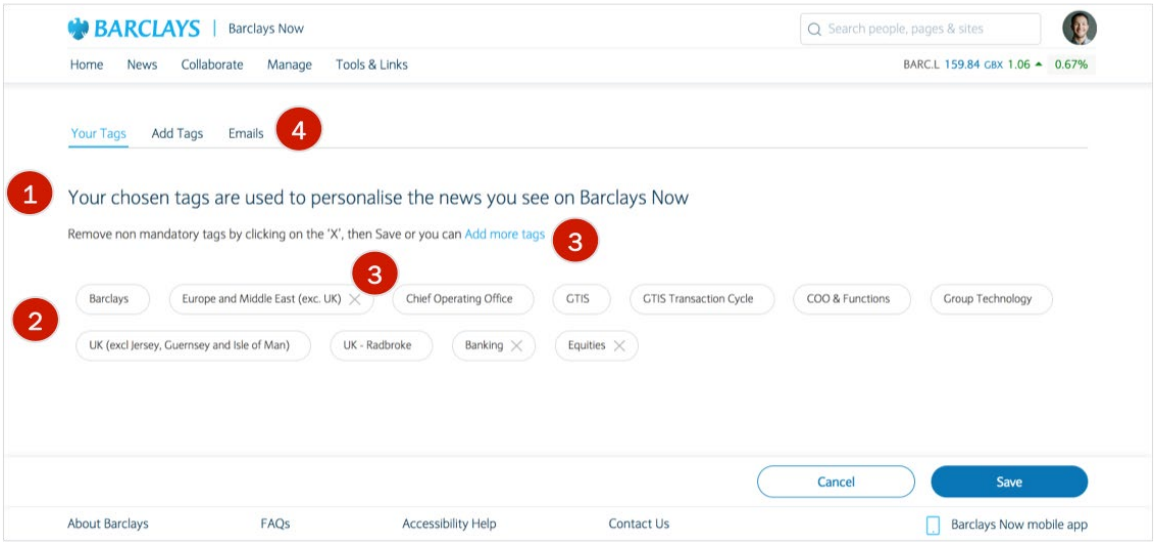
One of the DCE team's goals was to increase employee productivity. Making it possible to speedily access all of these key resources from the homepage is certainly one way to help meet that goal.

1. **Page hierarchy:** The use of varying text sizes, teal section dividers, and white space make it easy for employees to scan and decipher content sections.
2. **News:** The Corporate Communications team keeps a steady flow of news coming, so employees are well informed about happenings at the organization and in the industry. The news is a mix of selections based on the logged-in user's role, location, and user-selected topics. The large *Your News* section heading in the upper left of the homepage specifies that the news is targeted to the logged-in user.
3. **Targeted news:** The *Role News* section appears for users who have news that is specifically written for their role. An orange circle with a number in the section header communicates when new, unread items are posted and how many there are. This also matches the orange dot indicator in the *Role News* global navigation link under *News*. The *View all Role News* link leads to a larger list of items and reiterates the fact that the news is role-based.
4. **Headlines:** The *Headline News* section contains a selection of items curated from the vast body of news specifically for the logged-in user based on his or her role and location. Legible headlines and related images make the news easy to scan.
5. **Manage:** The *Manage* section toward the bottom of the page includes elements related to approvals and tasks.

1. **Approvals:** The *Approvals* cards display elements the user needs to tend to. The most necessary information, such as the topic, what it relates to, and the contact person, are visible. Large buttons on the homepage for *Reject* and *Approve* enable employees to act immediately. If they need more information before proceeding, the *View Full Details* link is just the ticket.
2. **Tasks:** The *Tasks* section includes information about mandatory training, usually related to legal, risk, and compliance issues. Given the gravity of the training, it's highly important that the right bank employees are aware of the training and take it, and that the bank tracks the training. The cards make all of this possible, with the course name, due date, link to a description, and a clear blue *Start* button.

3. **Social:** The *Collaborate* section shows both private Barclays-internal social messages, as well as notifications from communities to which the user is subscribed.
4. **Feedback:** The *Help us improve Barclays Now* section at the bottom of the page links to a survey about *Barclays Now.* Several elements make this a good survey advertisement:
    - The visible position of the call for participation
    - The plea for help (albeit not a desperate-sounding one) that implies that all employees can be of assistance
    - The expectation that it will take only two minutes
    - The button to take action and begin the questionnaire
5. **Tools and selected links:** The *Your Widgets* in the right rail includes items that the user selected to see on the homepage. Users can edit this list via the *Edit Widgets* link (with gear icon) in the upper right of the section. This area makes it easy for employees to find and use tools they need without having to go through the navigation or search. The first section, *My Favourite Tools & Links,* links to microsites that users have selected as their favorites. These apps, which were developed by various business areas or third parties, include items such as pay slips, phonebook, and travel expenses.
6. **Business area links:** The links in the *Quick Links* section are automatically added based on the logged-in user's business unit, though users can also customize this list though the *Personalise* link (with gear icon). This area gives employees easy access to documents and other deep links on various sites.
7. **World clock:** Barclays employees work in 50 countries, and their work patterns are diverse. A *World Clock* section on the homepage helps employees know the current time at a colleague or customer location. The city name, country flag, and time are listed clearly in a small, easy-to-consult table.
8. **Classifieds:** The *Marketplace* section displays items for sale and other posts from coworkers. This section offers a much-loved place for people to buy and sell goods from a trusted source. The *View More* button leads to a larger list of items in the marketplace, while the *Create Post* button enables users to add a listing right from the homepage.

Personalizing News



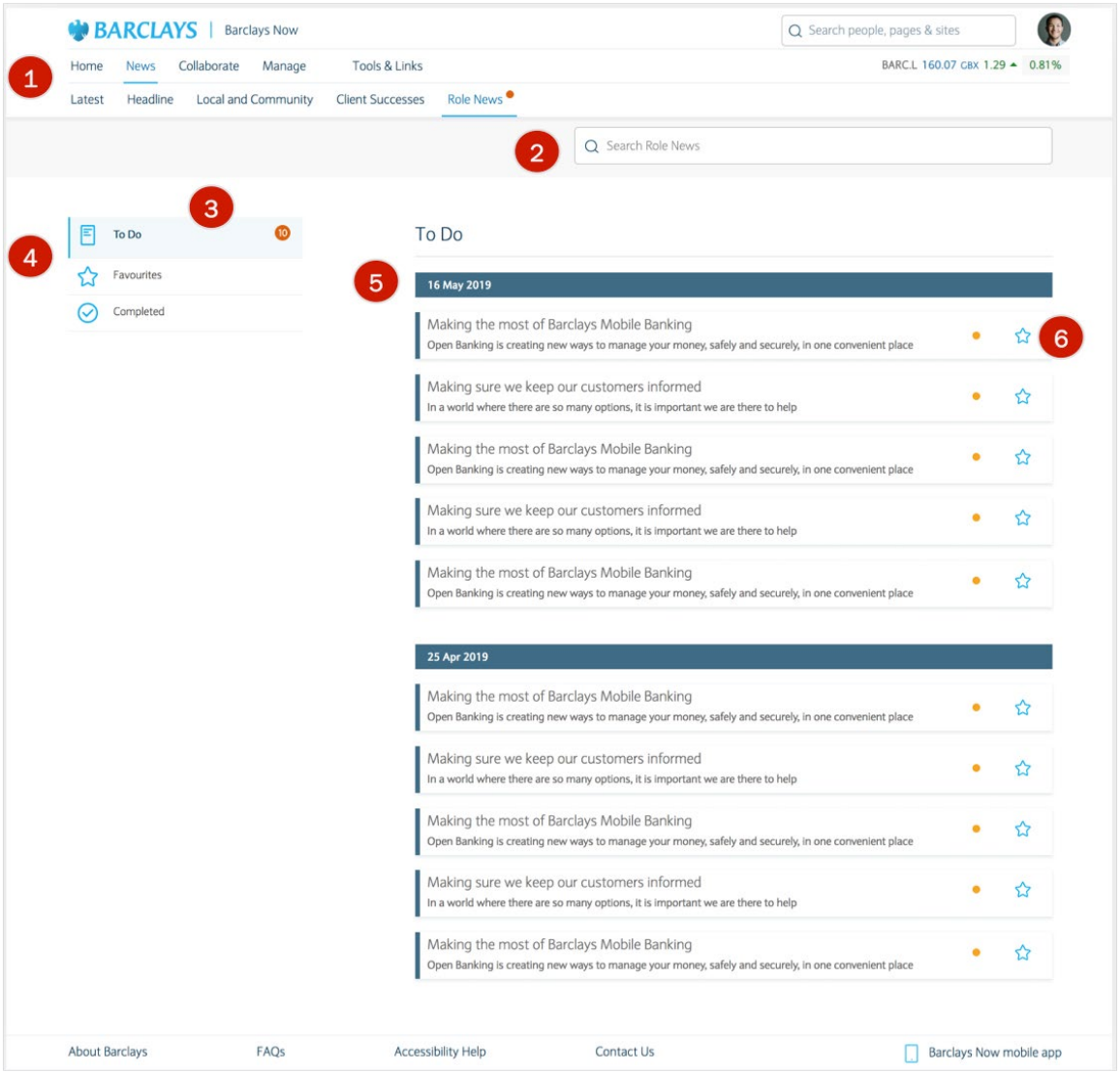
Pictured: Barclays Intranet Personalizing News. Users can choose topics for the email newsletters they receive, as well as for the news on the homepage.

Personalizing News Highlights

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

1. **Summary:** The text at the top of the page—*Your chosen tags are used to personalize the news you see on Barclays Now*—informs users about what the tags do. Designers don't take for granted that users can guess this, which is a sign of a vigilant design team.
2. **List:** The set of assigned tags appears in a horizontal list.
3. **Add or remove:** Users can click the *x* to the right of the tag button to remove the tag. The blue *Add more tags* link makes it easy for people to add more news topics that they are interested in.
4. **Email tags:** Barclays employees receive news via email newsletters. They can choose newsletter topics that they are interested in through the *Emails* link.

Role News and To-Do Items



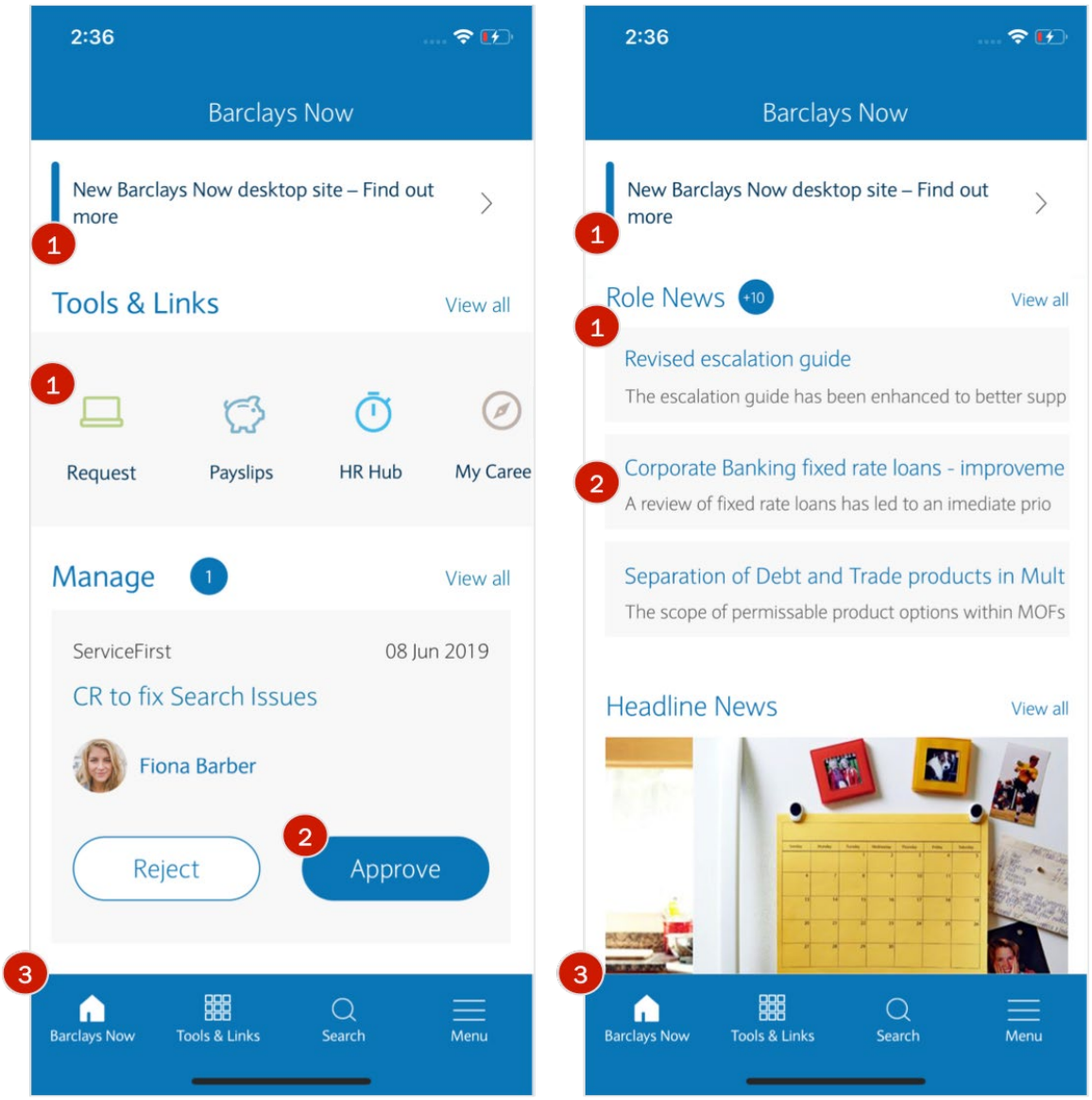
Pictured: Barclays Intranet News and Tasks. The news and tasks employees need to read are consolidated in one area and can be sorted by whether or not the user has yet attended to them.

Role News and To-Do Items Highlights

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

1. **Menu section:** Horizontal navigation makes it easy for users to know where they are on Barclays Now. The top-level menu item, *News,* appears selected because of the color change and blue underline. The secondary menu uses the same visual treatment to indicate which item is selected. An orange dot appears to the right of the *Role News* menu link, matching the orange dot used to indicate unread items on the list in the page. This consistency can help employees recognize when they have new items to attend to.
2. **Search:** A scoped search feature makes it possible to look for only targeted news. The search field's placement within the page (not in the header, like the global site search) and the prompt, *Search Role News,* both attempt to convey to users that they can search (or are searching) within only the *Role News* section.
3. **Select by status:** Employees can view items according to their status using the links on the left. The selected area is clearly marked with the light grey background and a blue vertical bar to the left of the label. For additional clarity, the page title matches the left-side label and appears in large blue text. The number of unread items appears to the right of the *To Do* link in an orange circle, matching the orange dot used to indicate unread items on the list in the page.
4. **Status:** Users can track their status and mark items as finished by reading the news item. Read items move from the *To Do* view (link on the left) to the *Completed* view.
5. **Date:** Items are organized by date, with the most recent toward the top of the page. Dates display at the top of their sections and are written in international format, starting with the day, followed by the month name written out and the year as a four-digit number. This eliminates possible confusion about the day, month, or year.
6. **Bookmark:** Items that users want longer-term access to can be bookmarked by clicking the star icon to the right of the item. This moves the item to the *Favourites* section, where people can find the items easily.

Mobile



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

Mobile Highlights

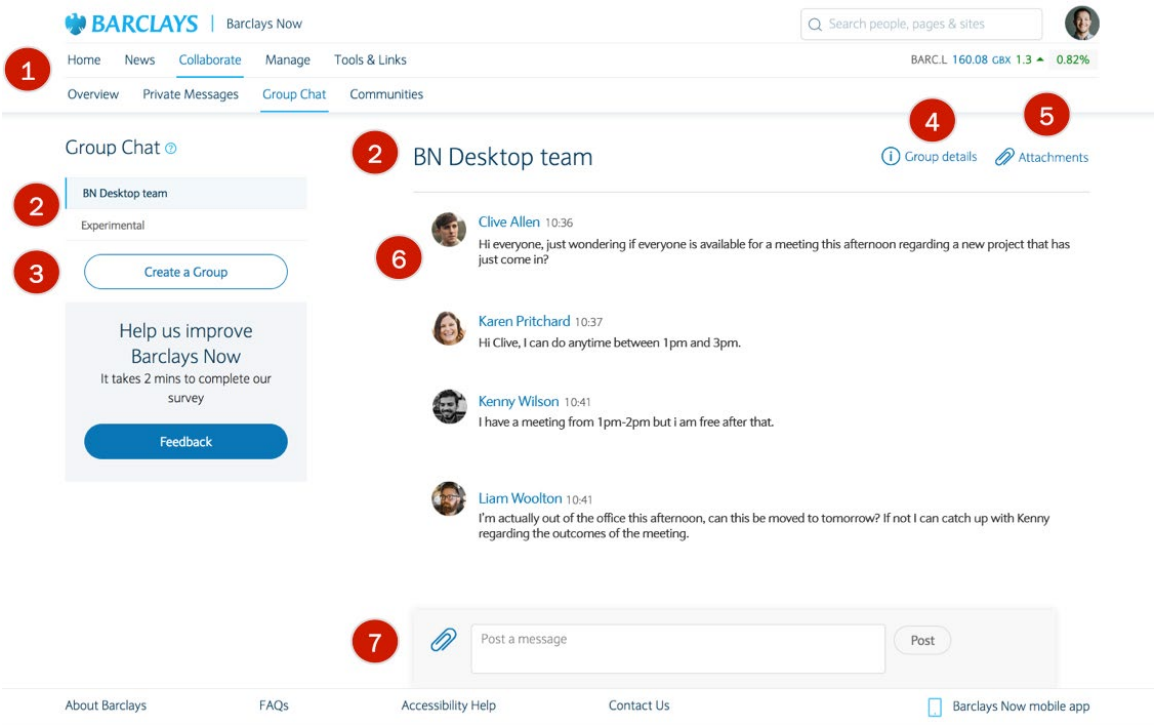
Many of Barclays' 80,000 employees work in multiple locations or travel for their jobs, which means accessing Barclays Now on a mobile device is not only convenient, it's necessary for good productivity.

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

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

1. **Flow:** The most important news items appear at the top of the screen, with logic and weighting based on a combination of recency and importance. The article then displays to audiences based on their role and location.
2. **Large buttons and links with adequate padding:** Links and buttons are all large enough to read and tap. The size and space between the adjacent tappable elements make the intranet easy to navigate on mobile, as well as on laptops with touchscreens.
3. **Navigation:** As with many mobile apps, Barclays' designers placed the navigation at the bottom of the screen. With this placement, desired content appears toward the top, while keeping the needed items—such as the search icon and link to home—within a thumb's reach.

Group Chat



Pictured: Barclays Intranet Group Chat. Employees can initiate and participate in group chats with their colleagues.

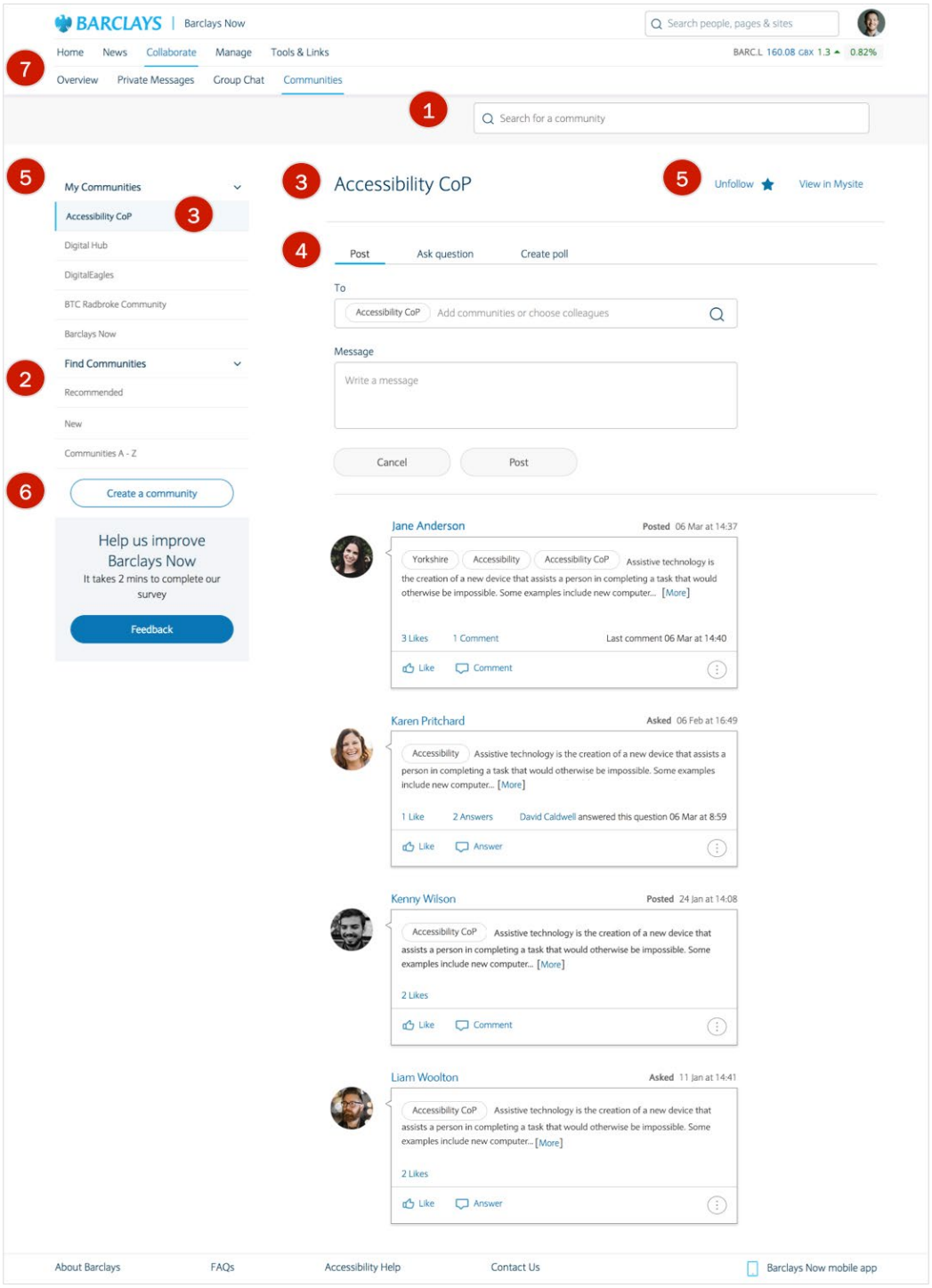
Group Chat Highlights

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

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

1. **Menu section and page title:** The top-level menu item, *Collaborate,* appears selected and displays related features, including *Private Messages* and *Communities*. The large page title, *Group Chat,* in the upper left confirms to users where they are.
2. **Chat rooms:** Each chat room to which the user is a member appears in a list on the left. The selected one has a grey background and blue vertical line; the name appears at the top of the content area.
3. **New group:** The large *Create a Group* button on the left is a great way to advertise that anyone can initiate a chat.
4. **Details about the group:** The *Group details* link in the upper right links to a page that describes the group's purpose and lists its members.
5. **Attachments:** The *Attachments* link in the upper right leads to a page that lists each attachment that has been added in the group chat. Thus, rather than having to scroll through all the messages, employees can easily locate files and other collateral that was shared in the chat.
6. **Chats:** Each chat item includes the name of the person who wrote it, his or her photo, the time of day, and the text of the chat itself. Clicking on the colleague's name opens a mini-profile pop-up to avoid taking the user off track. All of these features help employees stay connected with one another.
1. **Post:** The field at the bottom of the chats list—which is organized with the oldest chat at the top and most recent chat just above the field to post—suggests users *Post a message.* This short sentence is a good way to publicize the feature. The field size indicates that a few sentences would be just the right amount of text for a chat. Users can also add an attachment if they have more information to share in a file. The paper-clip icon is standard to indicate attachments, and is reinforced with the label in the upper right of the page.

Communities



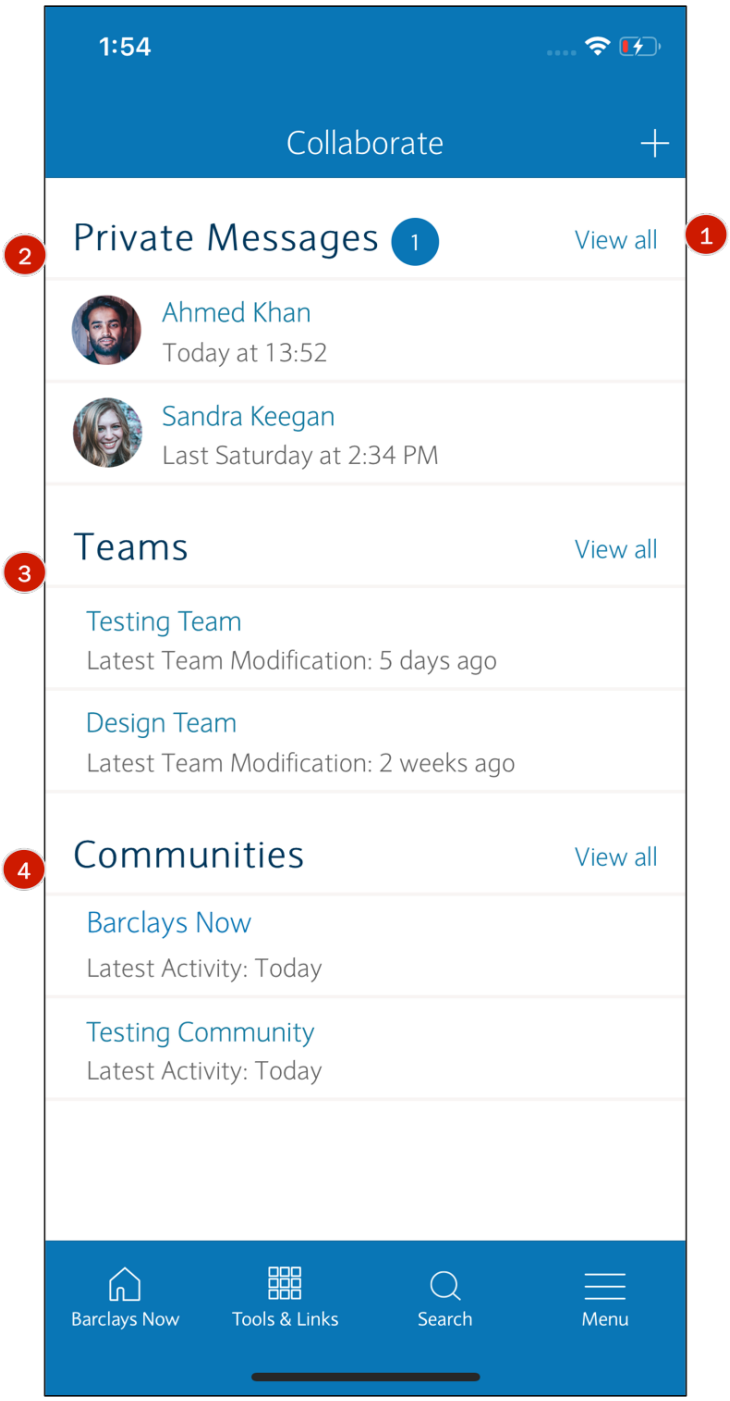
Pictured: Barclays Intranet Communities. Employees can access the communities to which they belong or can browse or search to find new communities to join.

Communities Highlights

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

1. **Search:** Users with a topic in mind can search the body of communities.
2. **Browse:** The *Find Communities* section of the left-side navigation enables users to browse the communities in various ways, including *Recommended, New,* and *Communities A-Z.* These are helpful and provide different options to help users see what they might be interested in.
3. **Current:** The currently selected community is easy to decipher with the link's grey background in the left-side navigation. The community's title also appears in large letters at the top of the page.
4. **Interact:** The top, horizontal links allow users to *Post, Ask question,* or *Create poll.* When writing a message, users can post in the *To* field not only in the current community, but also in additional communities. This makes it easy for people to share knowledge with other groups that might be interested in a post. Users can like and comment on posts, and the number of likes and posts is listed at the bottom of each post.
5. **Subscribed:** The list of communities the user follows appears in the *My Communities* section of the left-side navigation. To unsubscribe, users open the community and click the *Unfollow* link in the upper right.
6. **Create:** If they can't find a community they want, users can set up a new community via the *Create a community* button.
7. **Menu section:** The top-level menu item, *Collaborate,* appears selected because of the color change and blue underline. The secondary menu uses the same visual treatment to indicate which item is selected.

Mobile App Collaboration Tools



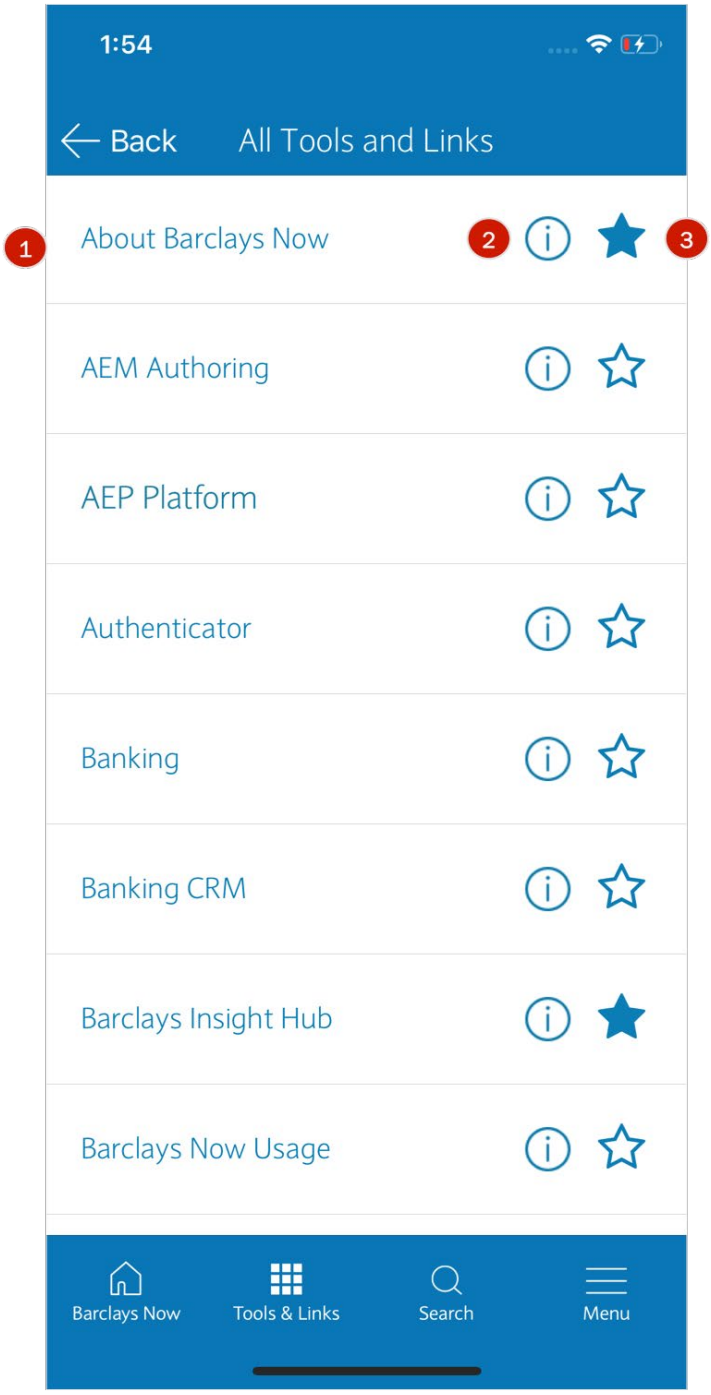
Pictured: Barclays Intranet Mobile Collaboration Tools. The two most recent items from each collaboration tool appear on the main *Collaboration* page. The *View all* link allows users to see the rest of each type of collaboration event.

Mobile App Collaboration Tools Highlights

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

1. **Sparse design to updates:** Rather than jamming the screen full of information, the team opted to provide minimal, yet important, information about the latest updates to each collaboration area. The *View all* link that leads to more details is just a tap away.
2. **Private messages:** Employees can see the most recent private messages at the top of the *Collaborate* main page in the mobile app. The message shows the sender's name and photo, and the message date and time. Users can also click the *View All* link to see the rest of their messages. A blue notification bubble with the number of new chats appears at the top.
3. **Project teams:** The two most recent project team messages show the team name and when that last update was made.
4. **Communities:** The name of the community and the day of the latest activity are displayed.

Mobile App Tools



Pictured: Barclays Intranet Mobile Tools. All mobile-optimized apps are easy to access and favorite in the mobile app.

Mobile Apps Tools Highlights

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

1. **Link:** Links to apps are listed in alphabetical order. This gives users access not only to their favorite apps, but also to all mobile-optimized apps. This makes more work possible on mobile.
2. **Information:** Tapping the *i* icon displays a description of the tool and its purpose.
3. **Favorite:** Once users know an app is valuable to them, they can make it even easier to access: Tapping the star icon adds the link to the tool to the user's list of favorites, and displays the link on the app's home screen.

Intranet Team Service



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

Intranet Team Service Highlights

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

1. **Description:** Two short paragraphs explain that employees will work with the digital team to get their content on the intranet. The *Work with us* subheading is welcoming and encouraging.
2. **Case study:** A mini-case study includes a quote about why one team wanted to put its content on the intranet. This is a good way to further encourage people who might want to put their content on Barclays Now.
3. **Benefits:** A modest visual describes three key benefits of including content on the intranet: it works well on mobile, it is always improving, and it is accessibility and security compliant. Outlining the benefits so succinctly can help encourage employees to contribute content.
4. **Preview:** The *How we work* section previews the team's process for design projects. An image describes the general phases—*learn, create,* and *measure*—so possible internal clients get an idea about how a project might go. This kind of preview can help a project run more smoothly, as it sets the stage even before the teams begin to work together.
5. **Initiation:** A set of six numbered steps offers details about the project initiation process; once again, the team had the forethought to communicate well, which starts projects off right.
6. **Contact:** People ready to initiate a project or discuss it can click the *Find out more* button to get in touch with the team. Employees can also give any ideas for improving the intranet via the *Feedback* button.

DESIGN PROCESS AND USABILITY WORK

A User-Centered Approach

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

- **Personas:** The team interviewed colleagues representing a mix of geographies, business units, and lengths of experience at Barclays. This led to five personas.
    - **The differentiating factors were:** what the job involves (typical everyday tasks); which tasks could be made mobile; how Barclays Now could be a game changer; *About me* (applicable business units, length of service, work environment, tech usage, tech savvy); highest and lowest priority tools; and biggest challenges.
    - **The needs that emerged were:** keeping track of all the different systems; having simple processes, clear navigation, and easy-to-find tools; making approvals mobile (so that managers and PAs can sign off requests); having mobile collaboration tools; bringing all systems under one umbrella; having customization options; receiving timely notifications for tasks; needing only one password.
- **Task identification:** The persona research helped to create a picture of the types of tasks colleagues do and their needs, goals, roadblocks, and challenges.
- **Design concepts:** With a solid understanding of the user types and their work environment and tasks, team members started to create design concepts and conducted iterative usability tests so that they could learn from colleagues before refining and re-testing.
- **Guerrilla testing:** The team also carried out guerrilla testing in the staff restaurant, which helped it recruit a higher number of test participants. There were dropouts from the planned sessions, not due to reluctance, but rather because the participants had had last-minute things come up that were higher priority. Given this reality, guerrilla testing was key to finding enough colleagues who were available to participate. Team members set up a table in the restaurant and put up signs to help lure colleagues over to chat so they could be recruited. This simple approach worked well. The team was able to get more participants in this way than with the planned sessions—in one day, the team typically recruited around 20 participants over three hours compared to six planned meetings in a day.

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

Post-Launch: The Focus on Users Continues

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

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

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

Designing the Homepage and News

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

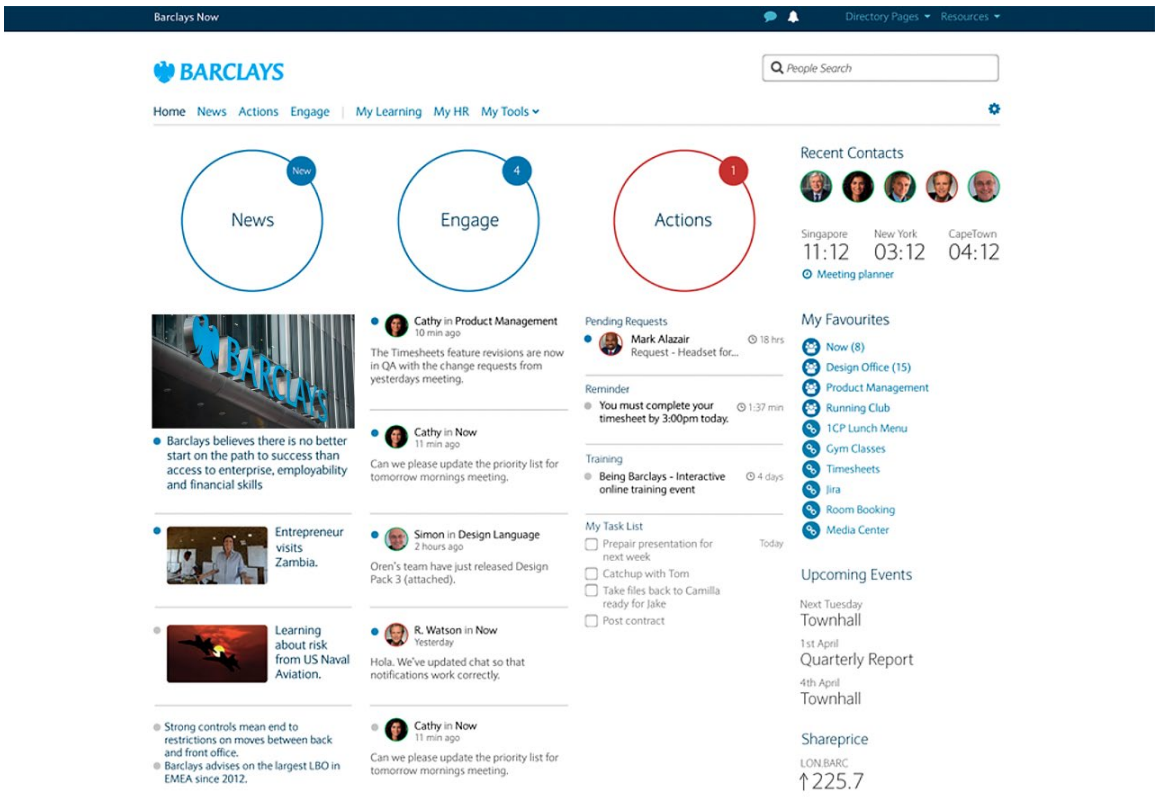
Now, when users open a browser, the Barclays Now homepage loads. Because the Barclays workforce has such diverse roles and works from so many locations, this homepage had to be personalized and customizable. The new homepage is thus more like a dashboard, personalized to each colleague by role and location.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

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

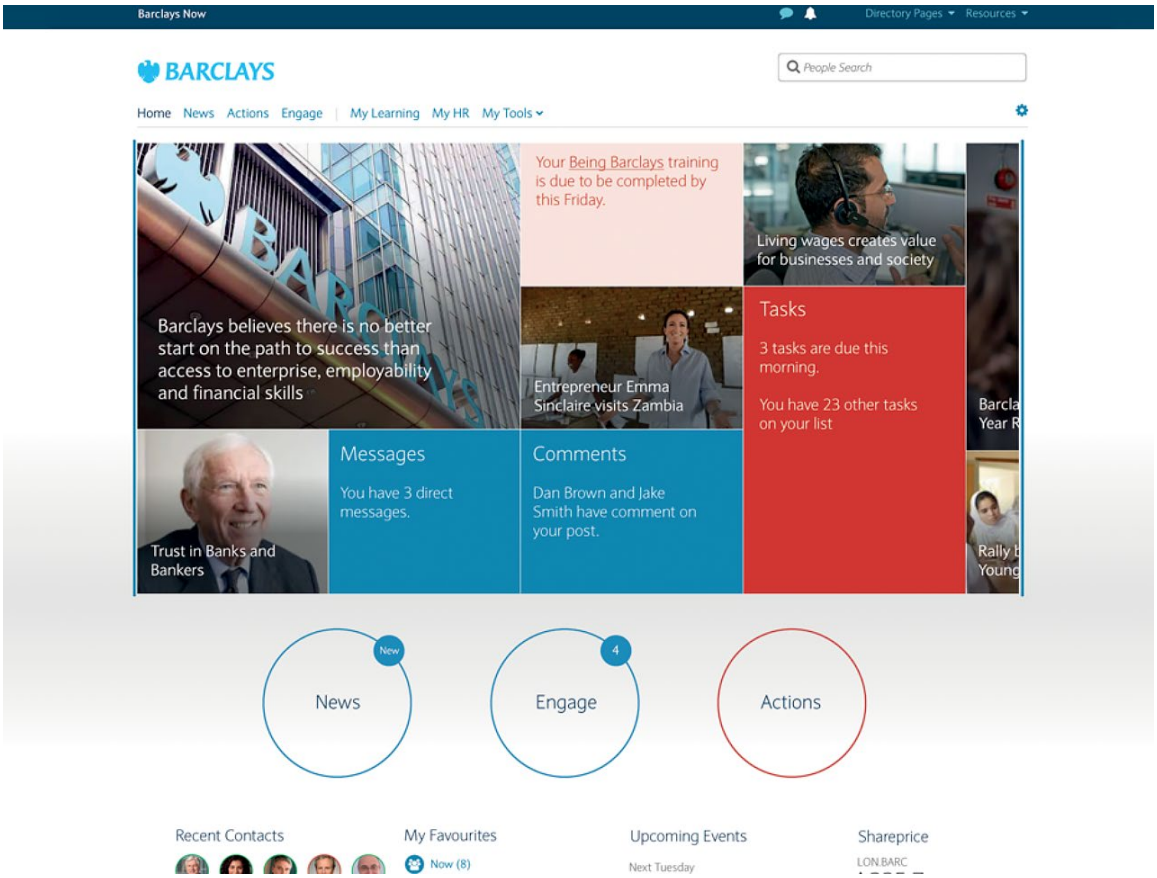
News has five sublevels: *Latest*, *Headline*, *Local and Community*, *Client Successes*, and *Role News*. These sections existed previously; the main change was in the IA. On the old site, all of these sections were homepage content with links that led to landing pages. Now, only the highest priority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

In early design concepts for the smart homepage, the team gave different amounts of real estate to the various pillars. The current solution solves this by displaying content depending on the user's selections and activity—such as whether they have

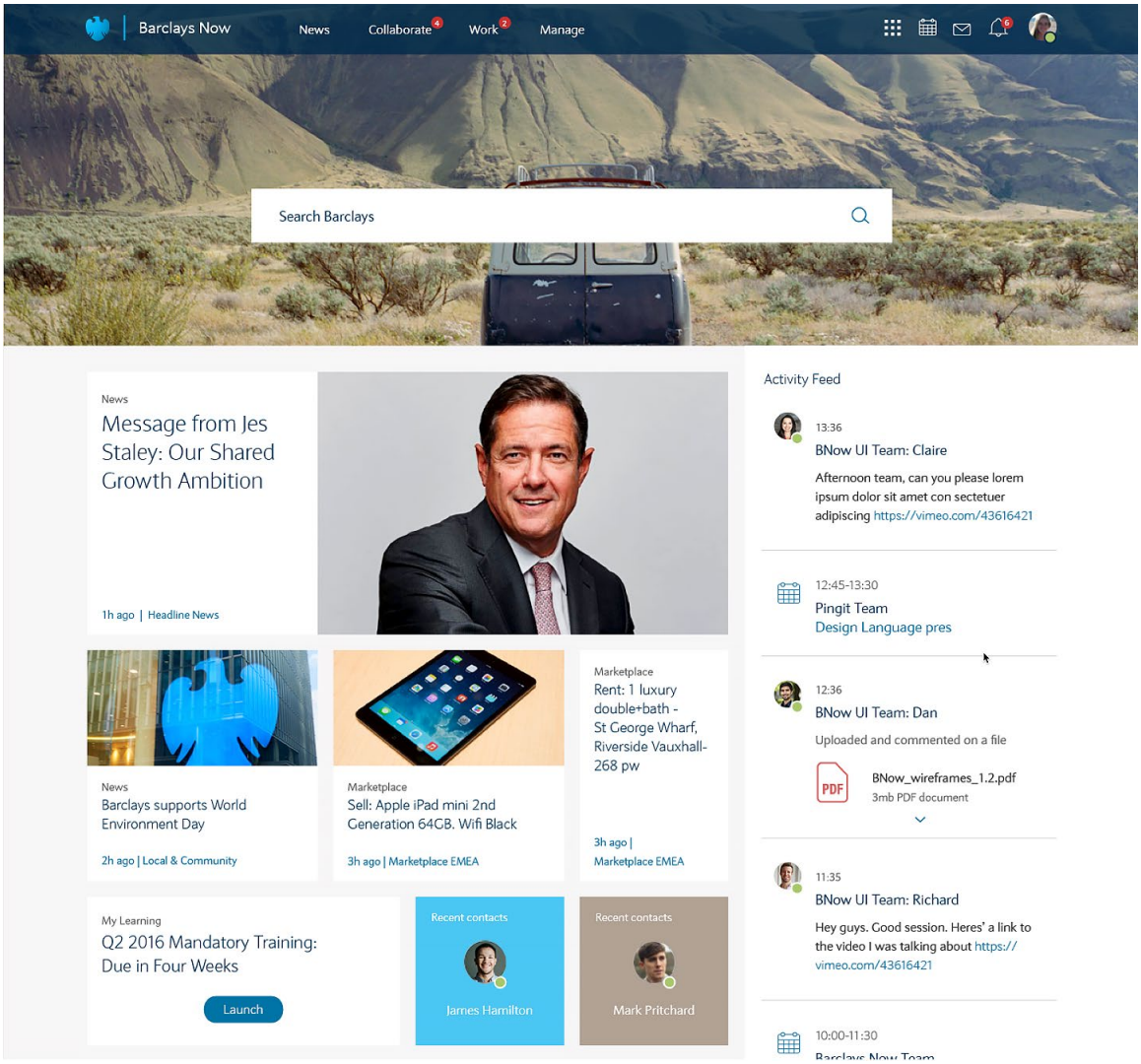
new messages or tasks pending, which widgets they have chosen, and personalized news and links. The screens below show how the team worked through various design approaches over time.



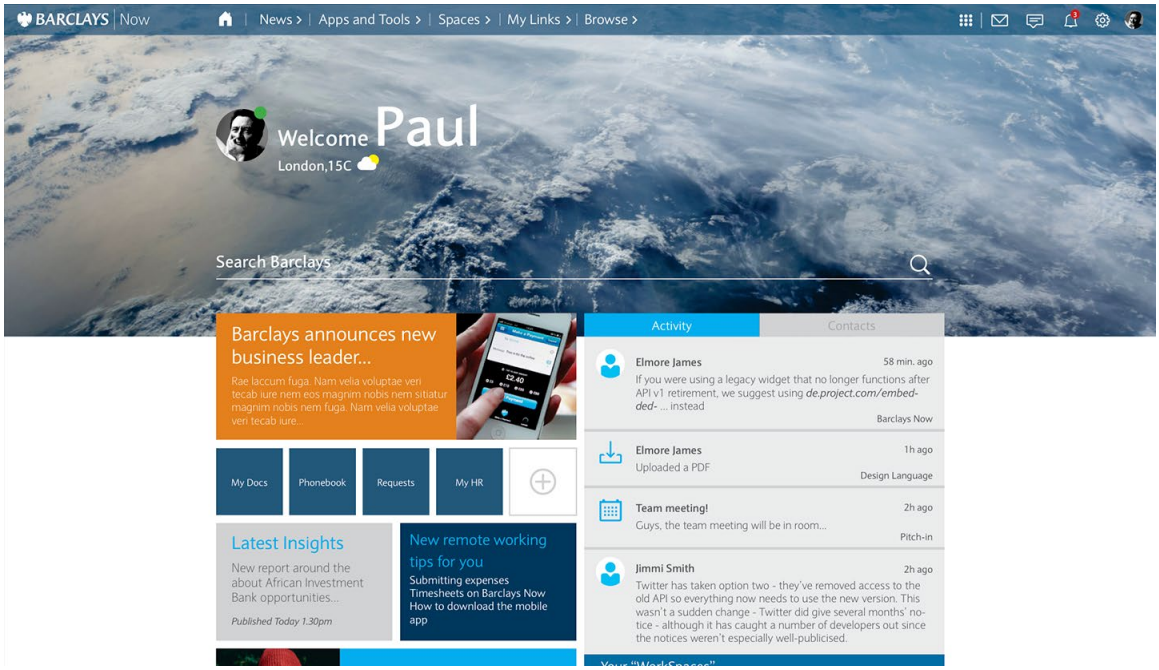
Pictured: Barclays Intranet Design Process. The homepage design concept with four columns: *News*, *Engage* (which later became, *Collaborate*), *Actions* (which later became *Manage*), and *Widgets*. This concept was designed before the decision was made to make the site responsive and after the mobile app launched. It borrowed the circles from the previous mobile site design to provide a feeling of consistency and continuity between the two sites.



Pictured: Barclays Intranet Design Process. Design concept with modular display for some of the smart homepage features. The *News*, *Engage*, and *Actions* pillars sit below, together with a widgets sidebar.



Pictured: Barclays Intranet Design Process. In this design, search is more prominent than the navigation links, as most colleagues navigated Barclays Now by searching. The *Activity Feed* in the right sidebar is another prominent feature. The social feed was intended to give the page a vibrant, active feel with real-time updates, as the previous design of news articles felt static.



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

Designing Collaboration Tools

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

- **Private messages** offer one-to-one or one-to-many instant messages.
- **Group chat** is an invitation-only feature that provides private chat rooms for project teams or other closed groups. Anyone can create a group chat, invite members, and share files and useful links.
- **Communities**—which anyone can join—unite communities of practice and other groups of colleagues from across the business who have shared interests.

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

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

1 = causes hesitation or criticism

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

3 = a task blocker

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

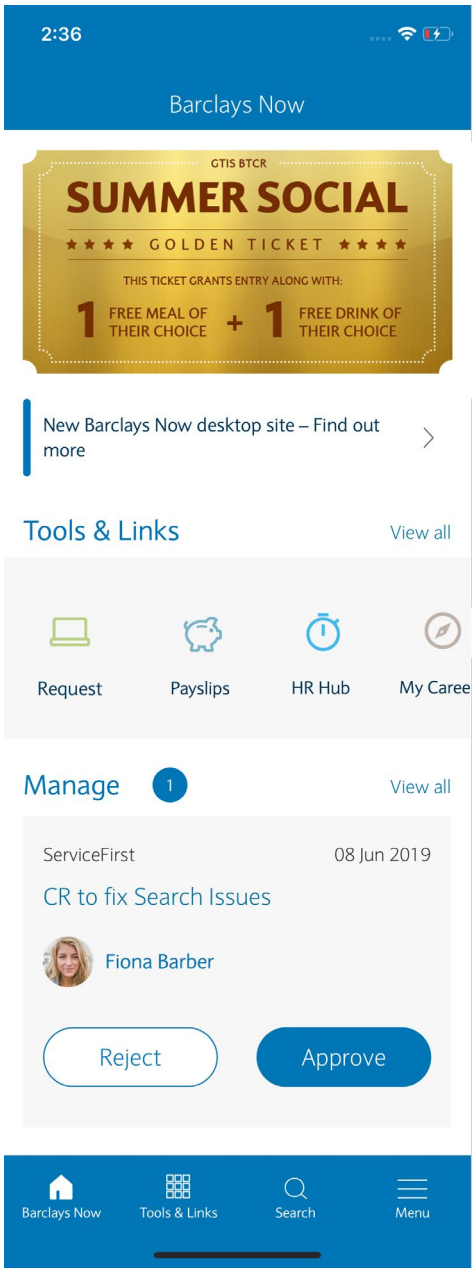
- "Teams" was a misleading name because users thought they were pre-existing chat rooms based on the organizational structure (i.e., that their own team would already be set up by default). Users understood what chat groups were, so the team changed the name.
- The team also made it quicker to create a team. Doing so requires only two fields: Group name and Group purpose. Prior to this change, users were asked to add team members and useful links.

Getting Buy-in Through Promotion

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

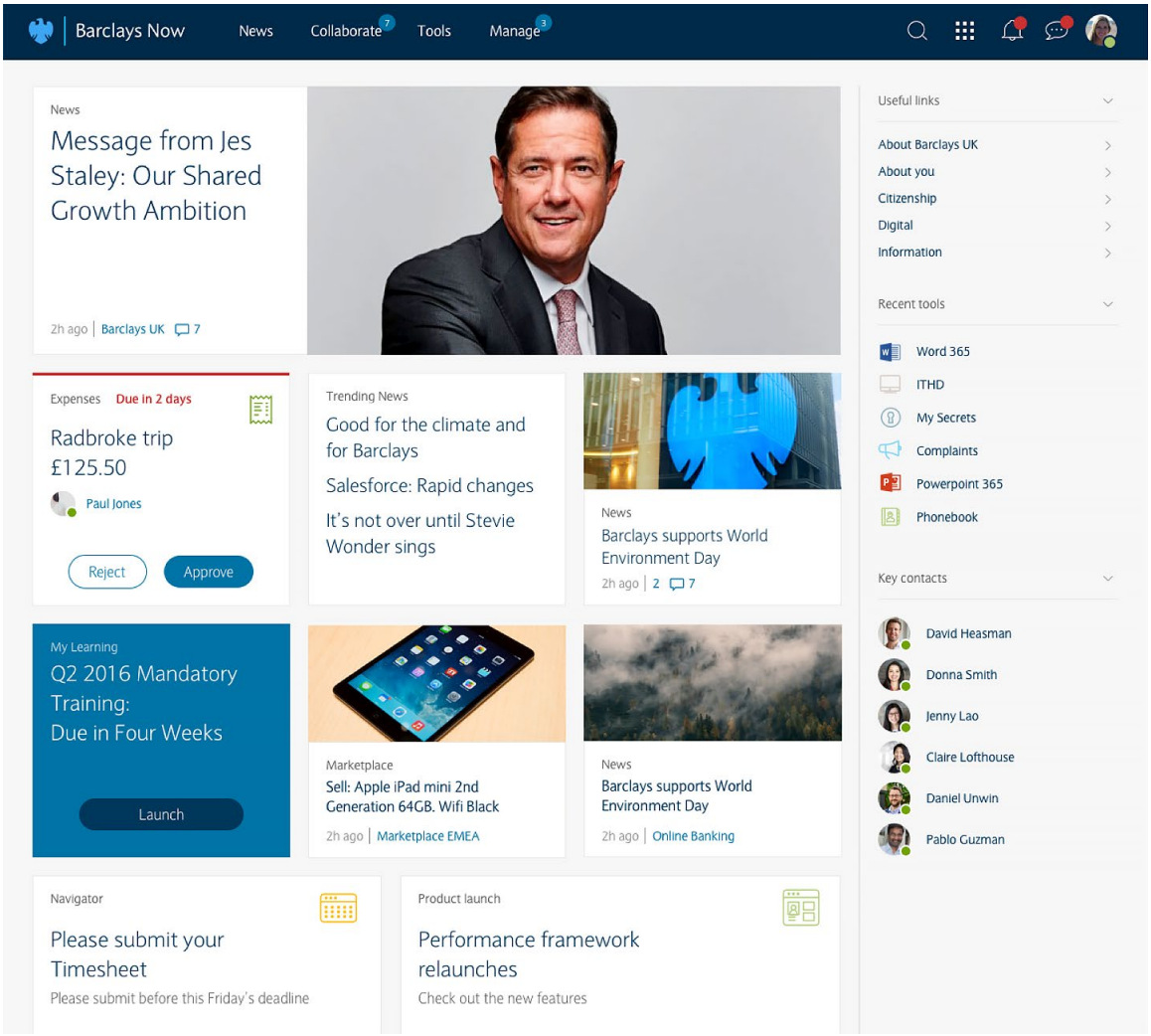
- **Barclays Now news articles:** Each group was emailed before the new intranet was rolled out to them. The emails contained a link to a teaser video showing some of the new benefits to come. After rollout, the groups saw a dynamic homepage banner with a link to a more detailed video.
- **Direct email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

- **Tech excite days and tech bars:** During tech excite days, which are like tech fairs, colleagues and suppliers have stands where they can promote their products. They are held in London; Pune, India; and New York. The Barclays Now stand showed the new homepage on a TV screen and members of the intranet team provided information about the redesign and app. They also gathered feedback.



Pictured: Barclays Intranet Golden Ticket Campaign. The Golden Ticket was a campaign for a summer party. The ticket displayed exclusively to colleagues invited to the event, which was held in the Radbroke campus in July 2019. Presenting the ticket allowed colleagues entry to the party, where they could claim food and drinks. The campaign prompted more colleagues to download the mobile app so they could get their tickets.

Designing for the Future



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

GOVERNANCE

Ownership

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

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

URL AND ACCESS

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

TIMELINE

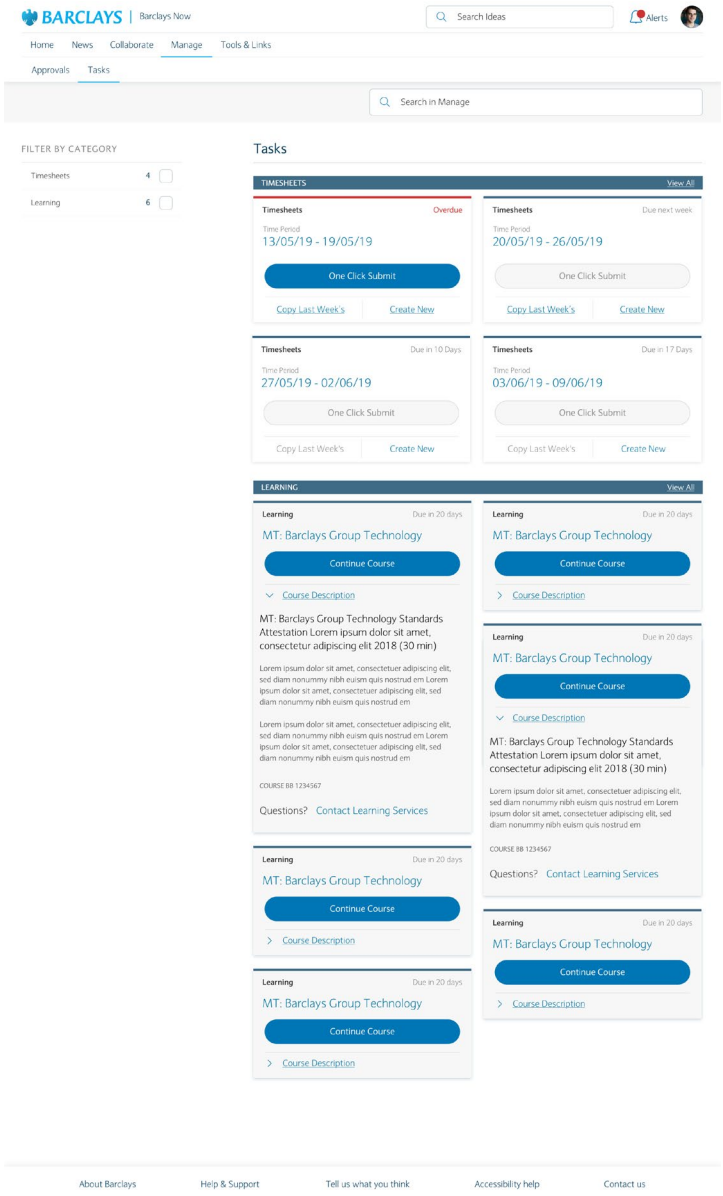
PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2014	• First consolidation from multiple intranets to one intranet
2015	• Launch of Barclays Now mobile application
2018	• Redesign and launch of mobile application on iOS and Android
2018–2019	• Redesign and launch of new desktop site

CONTENT AND CONTENT CONTRIBUTORS

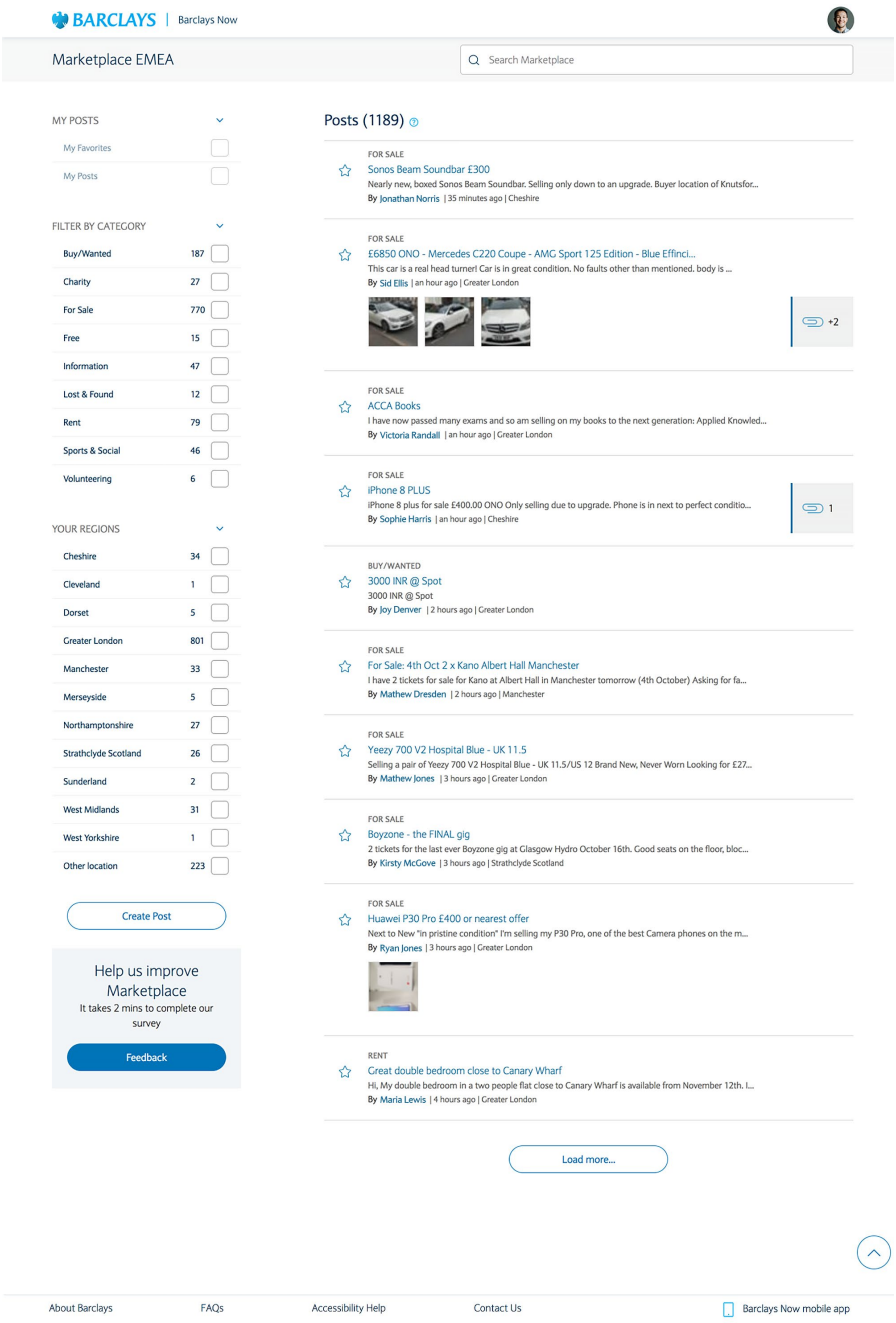
DCE does not have a content team; team members aggregate content from across the organization rather than create it themselves. The only content they create is the *Work with Us* page, the *About Barclays Now* campaign page, and FAQs. These are on a different platform than Barclays Now, so they can make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

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

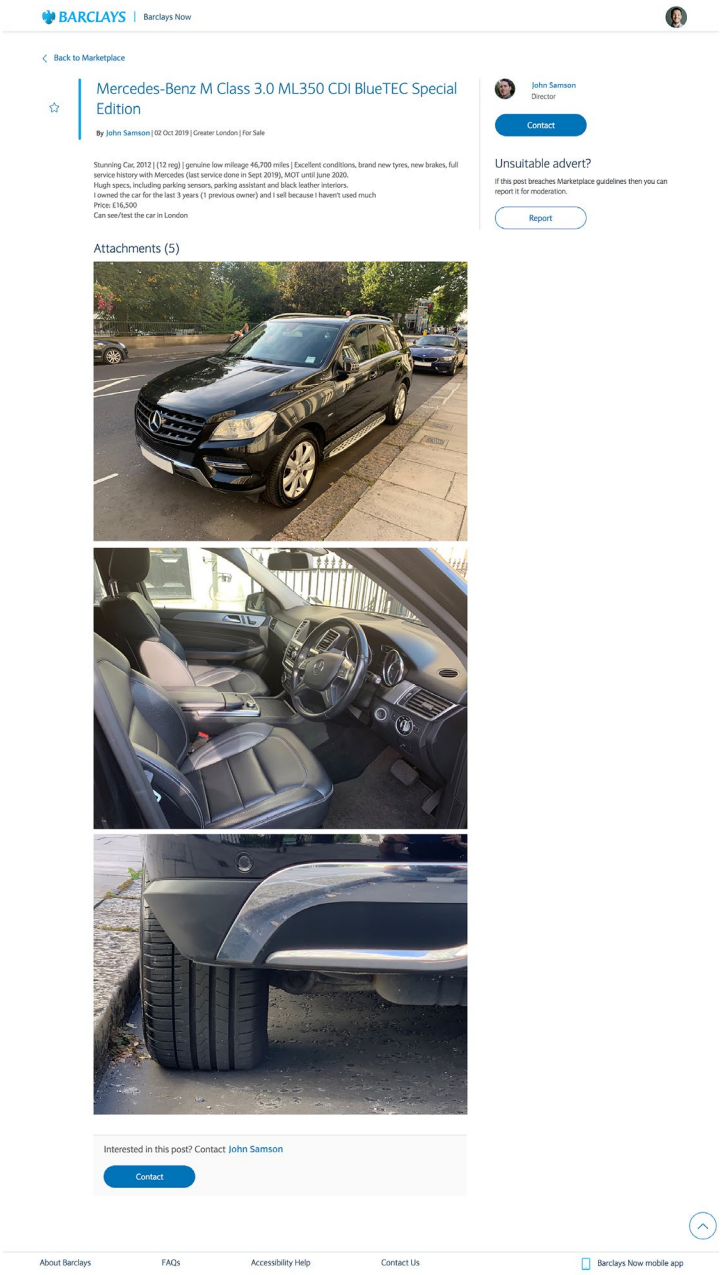
- **Tools & Links:** The business owners and the DCE team periodically review the *Tools & Links* section to ensure that these resources are up to date and relevant.



Pictured: Barclays Intranet Timesheets. Timesheets data comes from a third-party tool that has been integrated into Barclays Now. Many colleagues are required to submit a weekly timesheet so that projects can be cross-charged. The most common user task is to submit an exact replica of the previous week's timesheet, which can now be done in one click. Secondary tasks include the ability to copy a previous week's timesheet and edit it or create a new timesheet from scratch. This tool supports all of these task scenarios.



Pictured: Barclays Intranet Marketplace Listing. The *Marketplace* is a social feature where colleagues can post notices and advertise items for sale, accommodations for rent, charity events, and so on. Because *Marketplace* is social, it is not one of the core pillars in the global navigation. Instead, it's accessed via an optional homepage widget. *Marketplace* was available on the previous intranet but has been redesigned to let users add images on the listing page, mark posts as favorites, and filter by region.



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

TECHNOLOGY

DCE team members looked at different intranet products and had discussions with platform vendors; however, no out-of-the-box solution met their needs. For example, SharePoint couldn't do mobile. They also needed something

compliant with the company's security requirements and capable of integrating with all internal systems. So, after some consideration, they realized that anything they bought would need so much customization that it would make more sense to build their own platform, the way they wanted it. They could then be confident it was compliant with the company's security policy.

Building an Intranet In-House

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

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

MOBILE

Supporting a Multiscreen Workforce

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

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

And, in a twist that shows the team's commitment to mobile, the desktop site was redesigned after the mobile site was designed. Originally, the desktop site was not going to be responsive because the mobile app already existed. So, responsive design was not a requirement for the site. Research showed, however, that colleagues with one desktop or laptop screen open often used multiple minimized windows instead of tabs. If they wanted to see two screens/documents at the same time, they'd resize the windows and put them next to each other on the desktop screen. This behavior works only with responsive design, which led the team to choose it for the desktop.

SEARCH

Filtering and Refining Search Results

Search results are split into the following buckets:

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

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

Improving Search

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

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

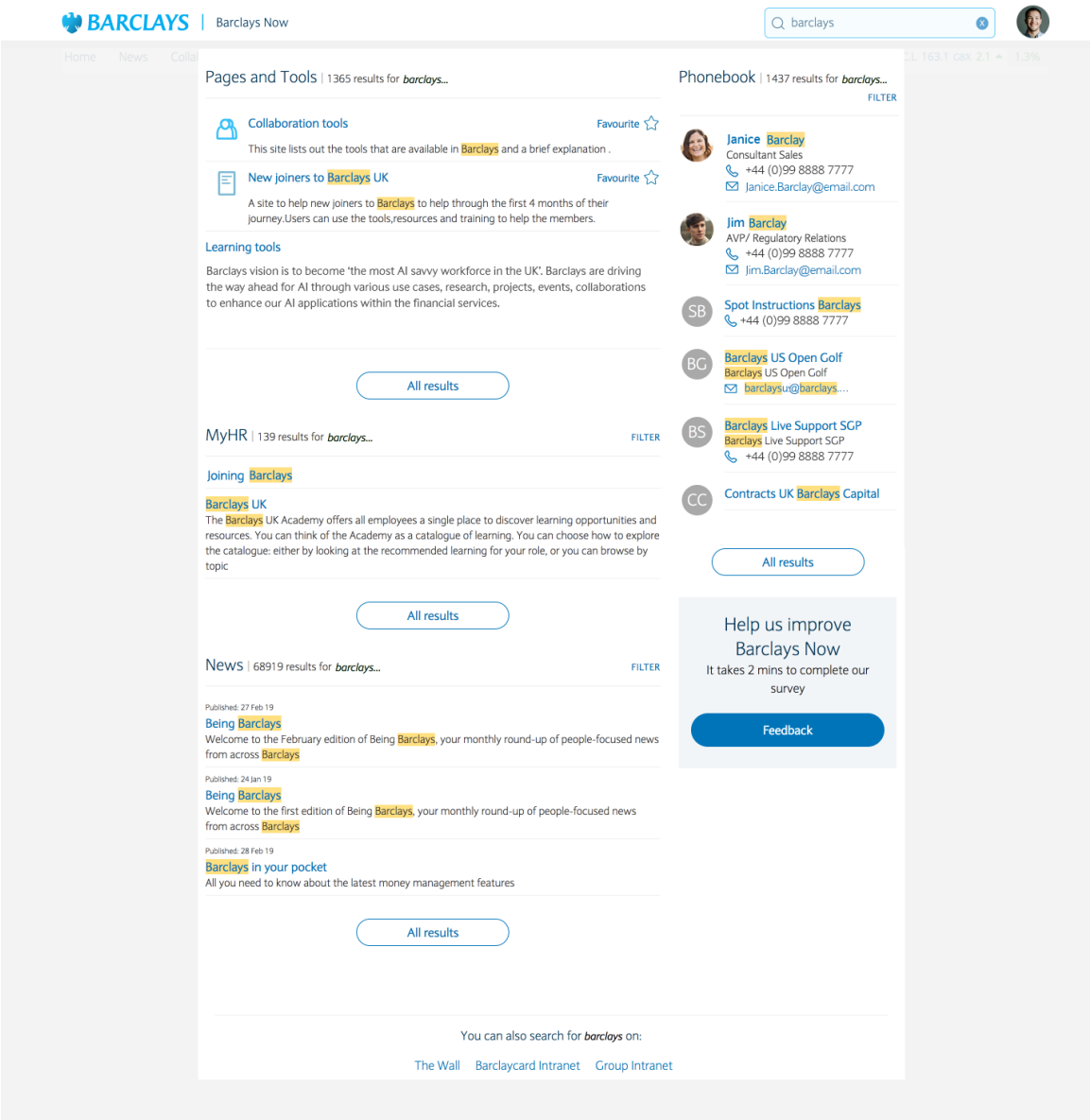
In the feedback form, users were asked what they were trying to find and the exact words they had entered. These missions and use cases provided great insight and led the team to add search functionality. For example, "I am searching employee number and can't find a colleague" led to the ability to search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

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

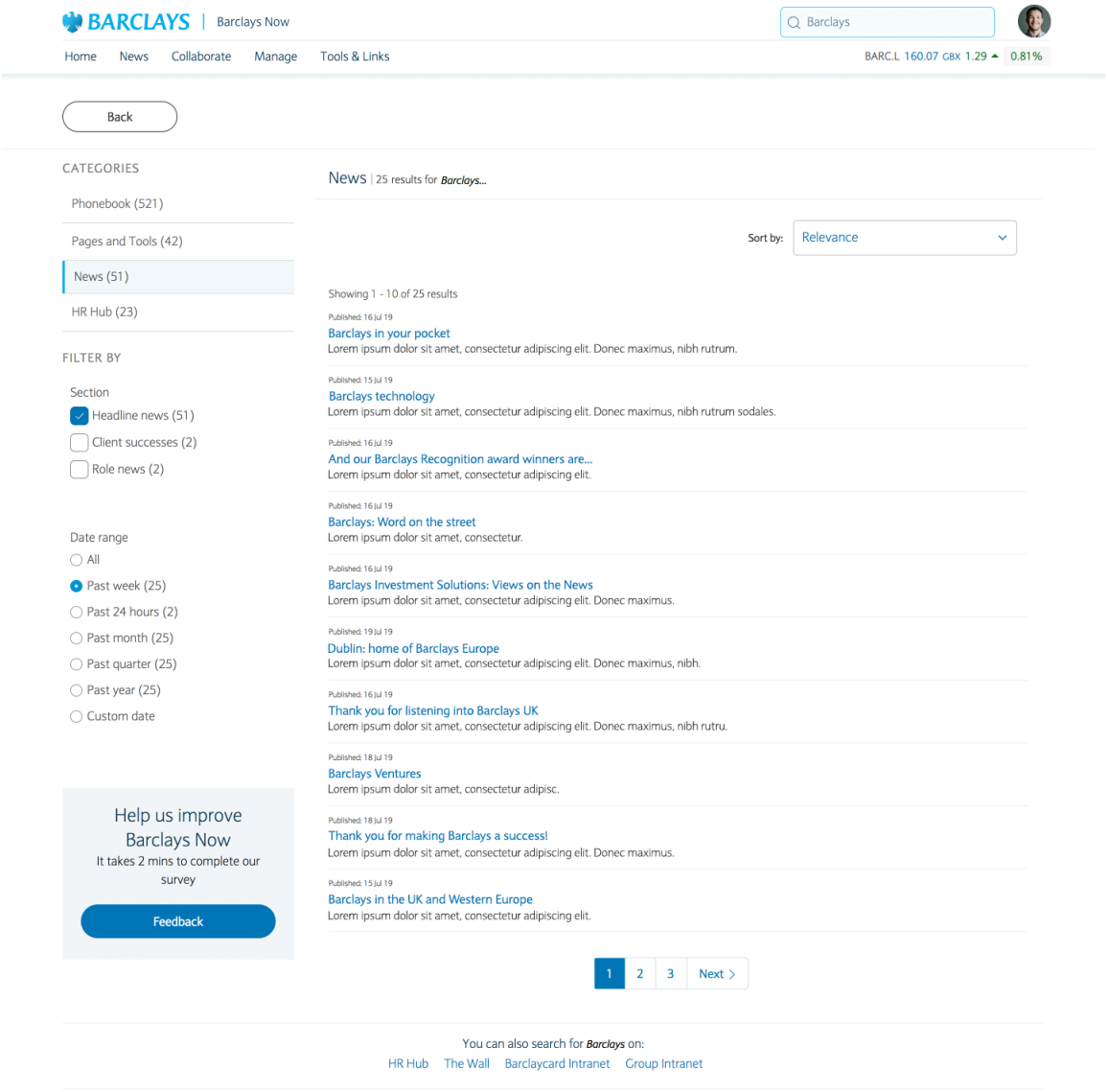
The team also conducted usability testing on the search functionality during the design project, but the main and ongoing source of data used to improve search was, and is, the feedback form. It was the first feedback form to launch on Barclays Now, and colleagues have been using it to provide feedback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

Ongoing Improvements to Search Relevancy

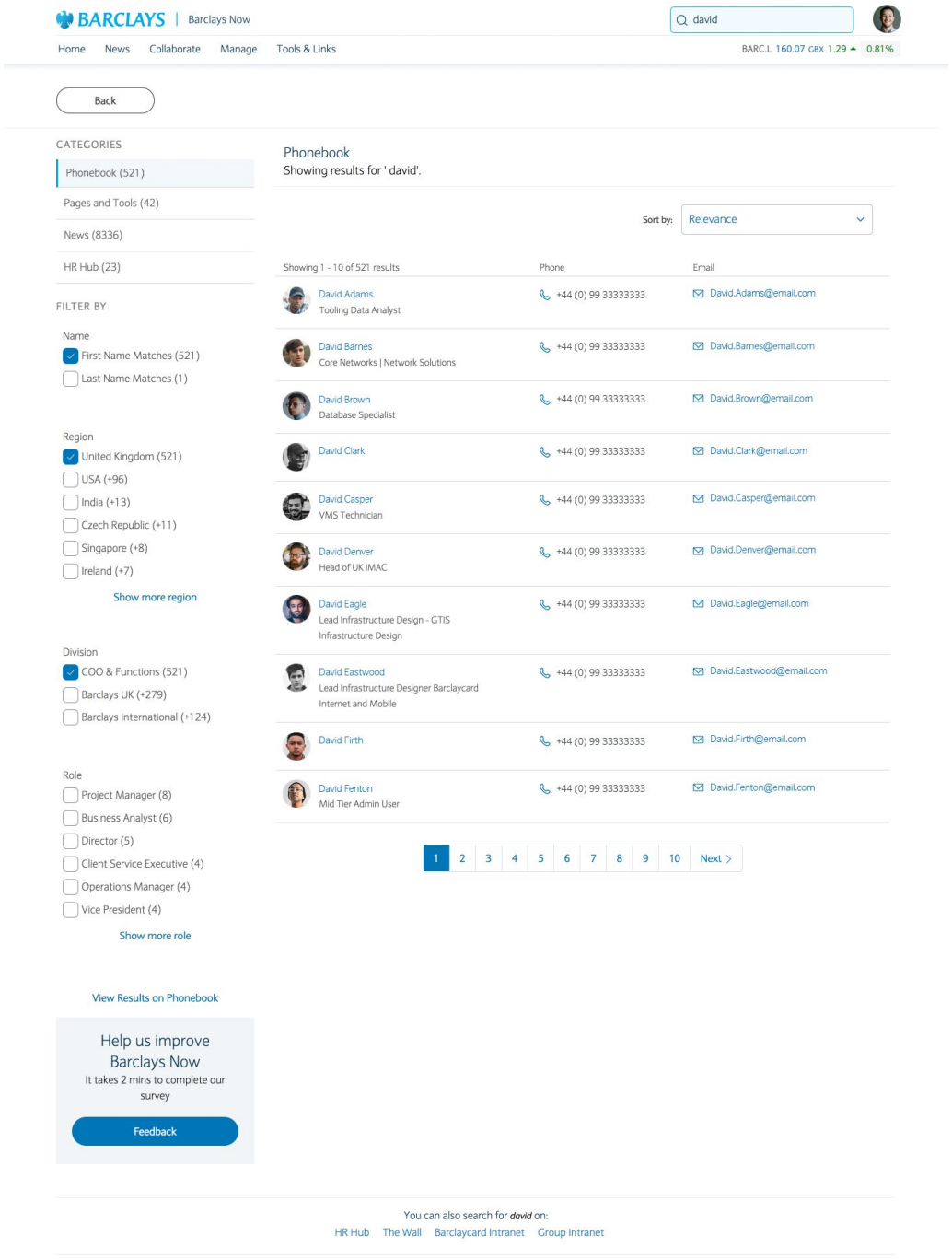
The DCE team continues to improve relevancy, and has upgraded the search technology to enable further improvements. For example, results are boosted based on various factors. For some searches, such as HR policies, the results are boosted for the user's location as that information can vary by location; *Phonebook* results are also boosted for colleagues connected to the user's team. Further, team members added an algorithm that suggests alternative search terms using the *Did you mean [term]* prompt. They are currently assessing other capabilities as well, including "you may also like…" functionality to encourage horizontal journeys through search results.



Pictured: Barclays Intranet Search Results Page. These results are pulled from the HR Hub, which is a separate site. Although it is not part of Barclays Now, colleagues expect to find these results on Barclays Now because it's "their homepage" and their go-to for information.



Pictured: Barclays Intranet News Search Results Filters. News search results with date range filters. Users can search news articles using date range filters to narrow results down to: the past month, quarter, year, or a custom date. The Custom date filter displays two calendars, from which users select a "from" and "to" date.



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

ROI

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

Business problems solved

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

Strategic benefits

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

Cost and time savings

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

Adoption and usage (monthly averages)

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

User Satisfaction

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

- *"I'm impressed with the layout as it makes access much easier. The favorites and quick links to the right of the page are especially useful for me as they are more efficient for daily use. It just looks slicker as well."*
- *"The new design is excellent! It's especially great how* Collaborate *notifications are highlighted, and helps promote communities."*
- *"Really enjoy the new layout on Barclays Now. The new way to approve requests is excellent, so much quicker than the Request Tool."*
- *"I simply wanted to say I like the new look and feel. It's intuitive, pretty quick. I also like my tools being readily to hand. Good job."*
- *"I like the experience of the hover-over facility for a brief intro to the story, [tool tips] that's really good. The homepage is really clean and responsive now!"*
- *"It's a lot easier to navigate and it's laid out in a more professional and cleaner format."*
- *"Homepage is really user friendly to navigate around. I haven't experienced any problems or issues at all. Everything that I normally look at is easily accessible. I love the fact that I can mark* Role News *as favourite."*
- *"Barclays Now page layout is easy and seems very quick to respond when browsing compared to previous, which is a bonus given how slow our systems tend to be."*

LESSONS LEARNED

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

- "*Tools & Links* had previously been called *A-Z*, and colleagues reported that they looked for it and couldn't find it after the section was renamed as *All Tools and Links* on the new site. The team then renamed it *A-Z Tools and links* instead of *All*."
- "On the mobile app, users didn't realize news headlines were hyperlinked, so a more obvious link was added to view more."
- "A surprising result was the feedback we received. It has been 75% positive or neutral with only 25% negative. Our busy colleagues chose to take the time to send positive feedback, prompted only by seeing a banner and button. We expected most users would contact us when something was wrong."

Focus on What You Can Control

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

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

About the Authors

In addition to those listed below, we thank co-authors Candice Goodwin, a journalist and usability consultant (2001-2003 Intranet Design Annuals), and Mathew Schwartz (penandcamera.com) (2004-2007 Intranet Design Annuals) for their essential work.

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Amy Schade is a Director at Nielsen Norman Group with more than 20 years of experience in usability, user research, and website design and development. She has led research, authored reports, and taught courses on the usability of intranets, mobile websites and applications, responsive design, emerging design patterns, email newsletters, and ecommerce. She co-authored the Intranet Information Architecture report and has co-authored the Intranet Design Annual since 2010.

Schade works with clients large and small in industries including telecommunications, ecommerce, nonprofits, government, education, and publishing, including extensive work on corporate intranets. She has conducted worldwide user research, including longitudinal studies, remote studies, accessibility studies, and eyetracking research, running studies in the US, Canada, Europe, Asia, and Australia.

Before joining NN/g, Schade worked as an information architect. She previously held a variety of positions in advertising and web production. She holds a master's degree from the Interactive Telecommunications Program at New York University and a BA in communications from the University of Pennsylvania.

Patty Caya (www.pattycaya.com) is a freelance journalist (writer and editor) and an award-winning digital media producer. In her business writing, she specializes in topics relating to usability (including social media and mobile design) and the business and technology of the web. She has co-authored the Intranet Design 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 nonprofits. She has a BFA from New York

University's Tisch School of the Arts and has completed coursework in the User Experience Program at Bentley University.

Dr. Jakob Nielsen is a principal of Nielsen Norman Group. He is the founder of the "discount usability engineering" movement, which emphasizes fast and efficient methods for improving the quality of user interfaces. Nielsen, noted as "the world's leading expert on Web usability" by *U.S. News and World Report* and "the next best thing to a true time machine" by *USA Today*, is the author of the bestselling book *Designing Web Usability: The Practice of Simplicity* (2000), which has sold more than a quarter of a million copies in 22 languages. His other books include *Hypertext and Hypermedia* (1990), *Usability Engineering* (1993), *Usability Inspection Methods* (1994), *International User Interfaces* (1996), *Homepage Usability: 50 Websites Deconstructed* (2001), *Prioritizing Web Usability* (2006), *Eyetracking Web Usability* (2009), and *Mobile Usability* (2012). In 2013, Nielsen received the SIGCHI Lifetime Achievement Award for Human–Computer Interaction Practice. Nielsen's Alertbox column on web usability has been published on the internet since 1995 and currently has about 200,000 readers. From 1994 to 1998, Nielsen was a Sun Microsystems Distinguished Engineer. His previous affiliations include Bell Communications Research, the Technical University of Denmark, and the IBM User Interface Institute. He holds 79 US patents, mainly on ways of making the internet easier to use.

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.

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.

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