# Best Retail Sector Intranets 2002-2020

13 Case Studies of Award-Winning Intranets from Retail and E-Commerce Companies, Reprinted from the *Intranet Design Annuals*

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# About This Report

A fairly small number of winners of Nielsen Norman Group's annual design competition for intranets with great usability came from the retail sector. Maybe companies in this sector have focused their IT efforts on customer-targeted applications as opposed to designs to support their own staff and stores.

We hope that this report will inspire more retail companies to emphasize good intranet design. Companies will sell more, the more sales associates know about the products, and stores will run more efficiently the better local managers are connected with company-wide information systems.

Intranets have much to offer the retail sector, as we have seen in our field studies at several retail locations. (These studies are not documented in this report, but the findings are integrated with other intranet design recommendations in our report series on intranet usability guidelines, see http://www.nngroup.com/reports/intranet/guidelines.)

The current report presents the case studies of winning intranets from the retail sector since the first *Intranet Design Annual* in 2001. Of course, some of these profiles are fairly old by now, and the winning intranets have been redesigned and don't look like the screenshots in their write-ups anymore. But even the oldest winners still contain many good ideas that the vast majority of intranets today would do well in emulating. And the war stories of what it took the winning teams to persevere and get a great design done certainly continue to ring true today, as they will ten years from now.

## THE WINNERS

### 2001

(No winners from the retail sector this year)

### 2002

Wal-Mart Stores (first winning design), page 6

### 2003

(No winners from the retail sector this year)

### 2004

(No winners from the retail sector this year)

### 2005

Park Place Dealerships, page 22

### 2006

METRO Group, page 38

Staples (first winning design), page 58

**2007**

(No winners from the retail sector this year)

**2008**

Barnes & Noble, page 91

IKEA North America, page 132

**2009**

L.L.Bean, page 162

**2010**

Wal-Mart Stores (second winning design), page 216

**2011**

(No winners from the retail sector this year)

**2012**

Staples (second winning design), page 274

**2013–2014**

(No winners from the retail sector these years)

**2015**

The Foschini Group (TFG), page 304

**2018**

eBay, Inc., page 326

**2019**

Flight Centre Travel Group, page 365

**2020**

Loblaw Companies Limited, page 401

## Wal-Mart Stores, Inc

**USING THE INTRANET:**
Wal-Mart Stores, Inc. is an international retail chain with headquarters in Bentonville, Arkansas.

**DESIGN TEAM:**
Wal-Mart *Pipeline* Team

**MEMBERS:**

**WEB DEVELOPERS/PROJECT MANAGERS: MICHELE MAESTRI, NITA MIX, LAURA HAMMARSTROM, AND PAUL SCHAEFER; NORMAN WILLIAMS, TEAM LEADER; ALSO INVOLVED IN THE PROJECT WERE TIM CRANE, JAMES MARSHALL, AND MARK QUINALTY**

*Pictured: The* Pipeline *home page. This is the default page for users in the home office.*

**SUMMARY**
Approximately 900,000 staff in the U.S. alone use Wal-Mart's *Pipeline* intranet. The company has separate intranets for its operations in Canada, Germany, and the U.K, but all use the same publishing guidelines, ensuring consistency across the company. Intranet teams in other countries essentially use the U.S. intranet's design, but with some interpretation to suit each country. The sites have been very well received by the associates and colleagues in each country, and in many respects have become the communication tool of choice.

*Pictured: A page used in Germany. Designers in all locations use the same guidelines.*

Individuals from all areas of the company use the intranet, including people in marketing, merchandising, and logistics, to name a few. What's more interesting is that these individuals also provide content by emailing it to the *Pipeline* team, who then prepares it for publication. "Our design philosophy is simply this: They own the content, we provide the look and feel," says Paul Schaefer, Web developer and project manager.

Knowing that numerous users have many different needs, these designers came up with a novel approach. When a user logs in, they are sent to the department page for the department they work in. This lets them quickly see the information that is most pertinent to them. Clicking the *Home* button on the browser or using the *WM Stores* link on their department page takes them to the home page for the stores. This intranet does an excellent job maintaining a consistent navigation model across many pages, stores, countries, and functions. The department and stores pages have basically the same look and feel, but with different color schemes and links to related content.

The designers understand the need to keep content new and different. A key feature of these pages is the *Last Updated* date found in the upper left of the page, directly under the header image. The *Pipeline* team uses this feature to manage the content for the department and ensure that pages are being updated regularly.

*Pictured: The toys department page. When an associate in one of the stores logs in to the system, he or she is taken to their department page.*

*Pictured: The logistics division's home page. Like other department pages, it has basically the same look and feel as the stores page, but has its own color scheme that sets it apart. The same style of navigation is used, but with links to logistics-specific content.*

The links under *Menu* are the same on all department pages (with a few exceptions), while the links under *Resources* are department-specific. Content under the department *Menu* includes specific guides and information employees need to do their jobs efficiently. The intranet's publishing guides help reduce printing costs and ensure that all stores have access to the same information.

Pictured: An example of a content page that would be found under the department *Menu*. The intranet's publishing guides help reduce printing costs and ensure that all stores have access to the same information.

WAL-MART stores

## Hanger Guide

**W226S - PS**

12" Top Hanger

**Item Number 9912412**

**Infant 0-24 Months**
Tops, Dresses, Sportswear, Sleepwear, 1- pc.
Swimwear, Coveralls, Creepers, Overalls
**Toddler 2T-4T**
Tops, Dresses, Sportswear, Sleepwear, 1- pc.
Swimwear, Coveralls, Creepers, Overalls
**Girls 4-6X**
Tops, Dresses, Sportswear, Sleepwear, 1- pc.
Swimwear, Rompers
**Boy 4-7**
Tops, Shirts, Sportswear, Windsuit Jackets

---

**W227S - PS**

14" Top Hanger

**Item Number 9912405**

**Girls 7-16, 4-16**
Tops, Dresses, Sportswear, Sleepwear, 1- pc.Swimwear
**Boys 8-18, S-XL**

Reference material is one valuable type of information that *The Pipeline* communicates. Employees also use the intranet to convey timely and time-sensitive information.

*Pictured: A page displaying how the buyers in the head office can communicate timely or time-sensitive information to the stores. Like all other content pages, the look is consistent and controlled by the template and CSS.*

Department 20/21/22
Domestics

WAL•MART stores

## Notes From the Buyers

Shareholders Recap 2001

Department 20 | Department 21 | Department 22

## Department 20

**Bath**

**Jubilee Towels**
Try to maintain the solid color pallets that were sent in August. These displays got the towel increase over 30%. For stores that did not receive pallets, set endcaps of your best sellers for increased sales!

**18 pack Wash Cloth**
This is the #1 item in dept. 20. Inventory is high but sales are also on the same trend. The average store is selling 75 pieces a week. Maintain endcap features to capitalize on sales and profits.

If you mark this item down to move it out, replenishment will send you more.

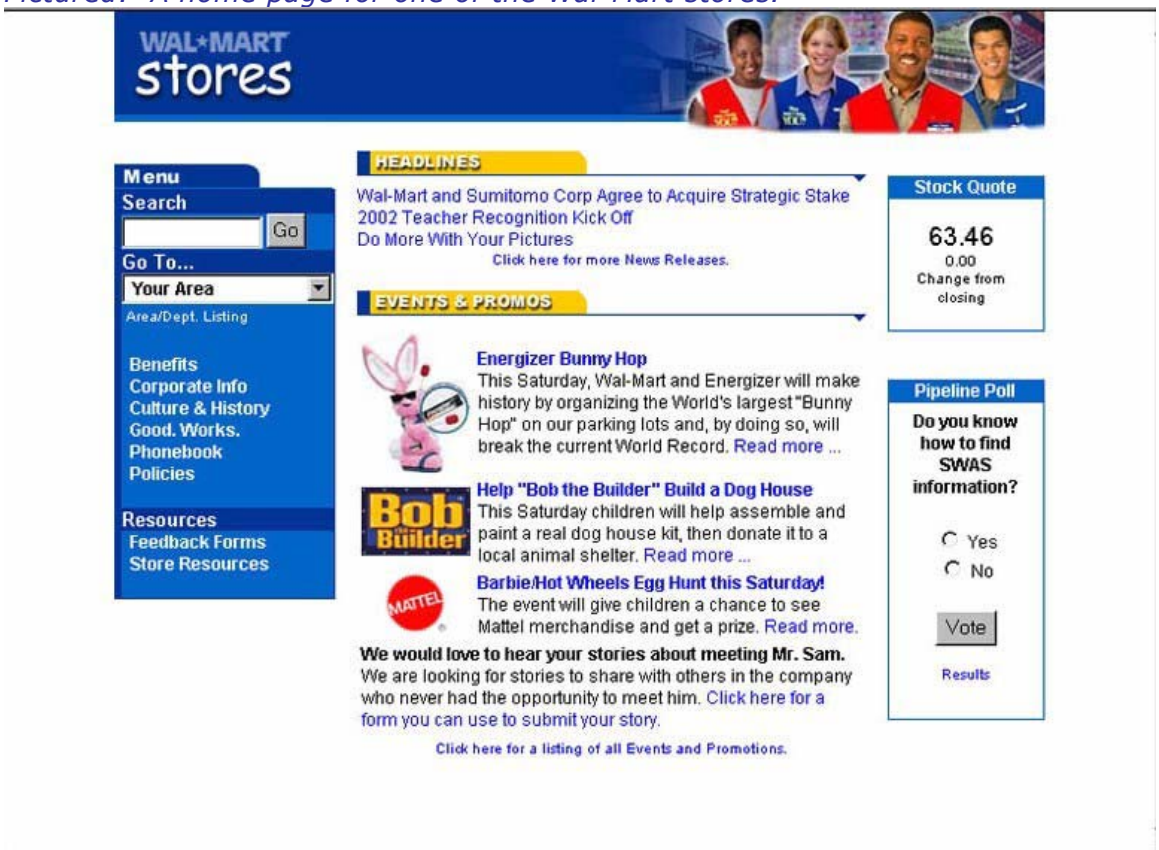
**Rugs**
Christmas has arrived; features should reflect the holiday theme.

Stay instock on the basics, basics still drives the high volume sales.

**Decorative Pillows**
All 2.50 Christmas doormats should be out and pulled together in the domestics department.

All Christmas pillows should now be out in power alley for last minute gift giving . group all non-modular pillows now by price point

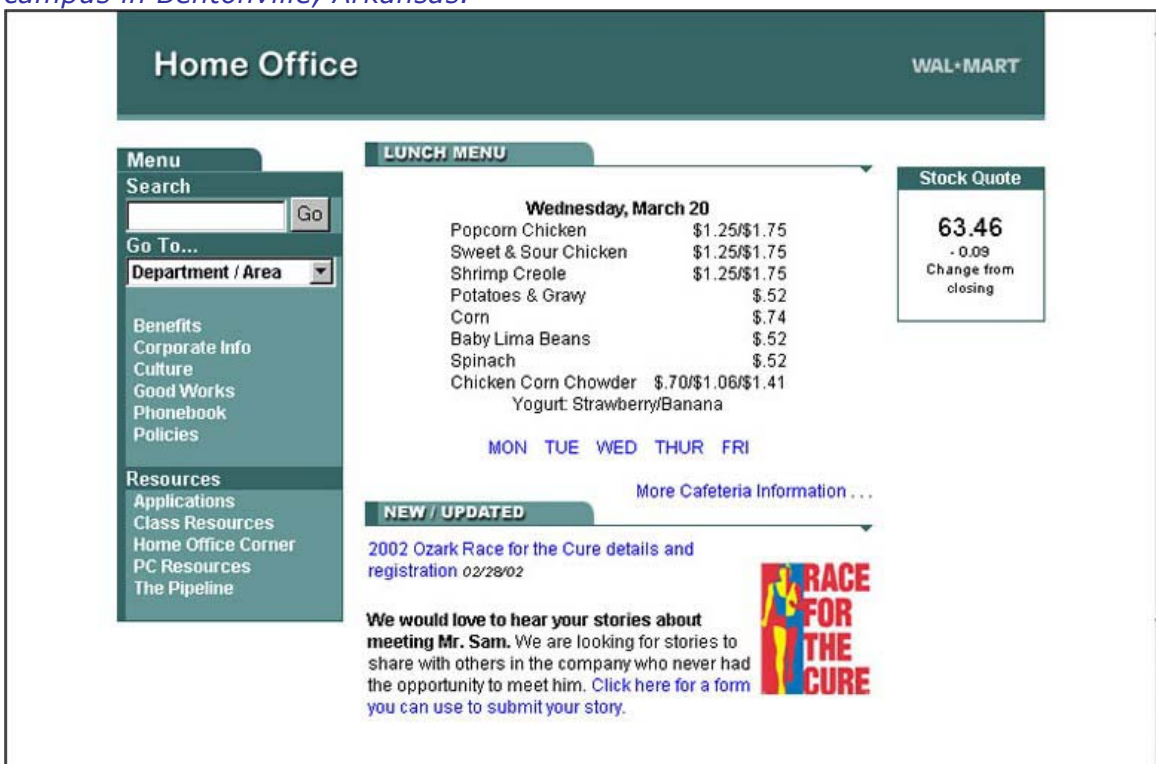
*Pictured: A home page for one of the Wal-Mart stores.*




An interesting feature of the stores page is a weekly poll, on the right side of the page. Designers use this as a tool to educate the associates about current topics.

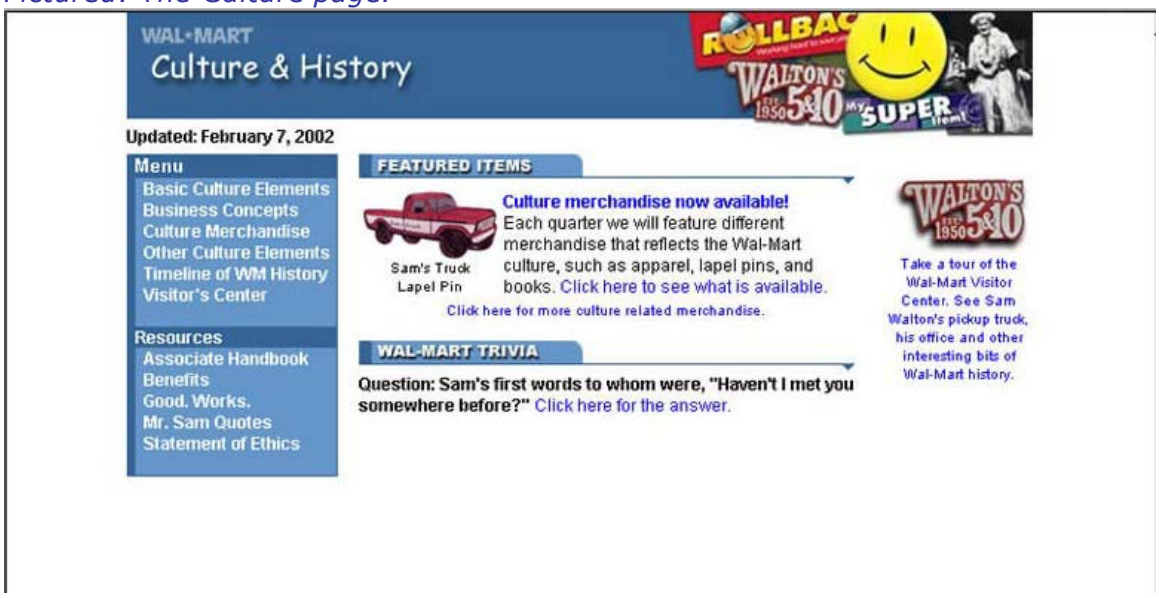
The home page for the associates in the Wal-Mart home office campus in Bentonville, Arkansas, is tailored to that location. Also, like the other location pages, it shows the current stock price. This reflects the company's culture of ownership and has proven to be a very popular feature of the site. The stock price is displayed through an I-frame that is refreshed approximately every five minutes while trading is in session.

*Pictured: The home page for the associates in the Wal-Mart home office campus in Bentonville, Arkansas.*




One of the things employees say sets Wal-Mart apart from other companies is their corporate culture. To support this, designers created a *Culture and History* page on the site. This links to everything from the *Statement of Ethics* to the company's history. It even has a virtual tour of the Wal-Mart Visitor's Center.

*Pictured: The* Culture *page.*



*The Pipeline* intranet embodies the efficient operations and hometown feeling that Wal-Mart is known for. Even with almost a million users, the intranet was designed to make employees feel that it was made for each of them individually.

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

### DESCRIPTION OF THE INTRANET

Wal-Mart Stores' intranet, *The Pipeline*, delivers information to store employees. It is a static, template-driven site made up of more than 12,000 HTML files, 6,600 PDF files, and nearly 7,000 images.

### BASIC FEATURES

Wal-Mart's intranet, *The Pipeline*, delivers the information that employees need to do their jobs, including:

- Departmental policies and procedures
- Departmental information, such as internal and supplier contact numbers, lunch menu, and stock FAQs
- Employee self-service, including company benefits information and online enrollment
- Information about upcoming sales and promotions
- Company news
- Corporate information such as stock price, history, and culture

### URL AND ACCESS

Users can access *The Pipeline* by opening their browser. The PCs have been modified so that the default page is the intranet. In the stores, users go through a sign-on that identifies the department they work in and sends them directly to that home page (that is, a department manager in electronics will be directed to the *Electronics* home page). *Pipeline* is not a public site; it resides on servers within the corporate network.

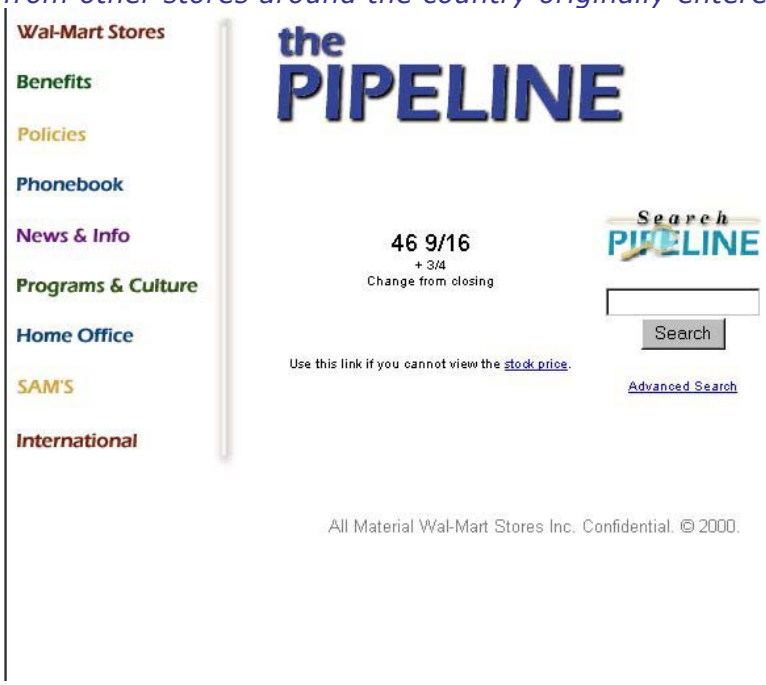
### BACKGROUND

*The Pipeline* has its origins in the policies, procedures, and guidelines that the company's training department had to relay to stores around the U.S., and is still part of the training department. It first appeared in Web form in 1998, and from then on other departments, such as merchandising and public relations, started adding information to the site. As the volume of content grew, users started to complain that it was hard to find the information they wanted quickly.

One challenge was that the site was trying to address two very different sets of users with different needs: staff at Wal-Mart headquarters in Bentonville, and employees in its stores around the country. Both groups entered the site from the same high-level

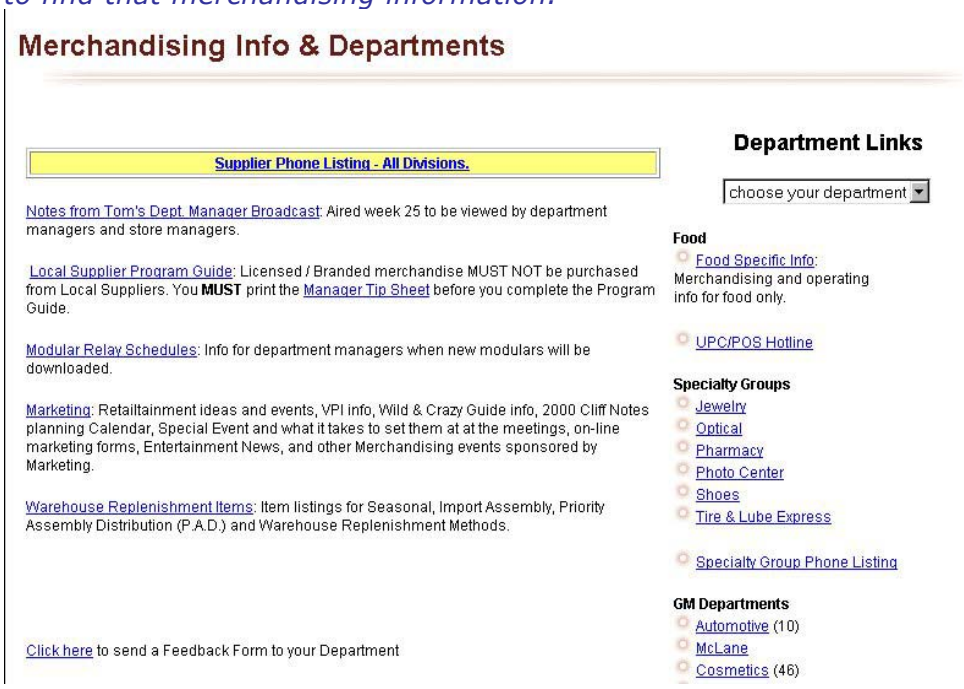
page and someone in search of merchandising information, for example, would have to drill down through three levels to find what he or she wanted to know.

*Pictured: The high-level page that both home office employees and those from other stores around the country originally entered the site from.*




*Pictured: A second-level page a user would drill down to if he or she were searching for merchandising information, for example.*

*Pictured: A third-level page the user would have to drill down to in order to find that merchandising information.*




Another challenge was that information was organized by department, rather than by operation. "In the old intranet, for example, if the training department published a goods-receiving manual, it would put it in the training area of the site," says Mark Quinalty, former business analyst. "But associates [this is what Wal-Mart calls its employees] looking for that information out in a store might not have thought of it as training. They just knew that certain pieces of information applied to their business in a certain way."

So, in January 2000, *The Pipeline* team started work on a new intranet version, in which users would be taken straight to the information they needed to do their jobs. "It's a filtered rather than a restricted view," Quinalty explains. "You can see any information you want, but you're guided to view it in a particular way." For example, someone working in the toy department of a store will be presented with a different start page than someone in the head office.

### GOALS AND CONSTRAINTS

The primary redesign goal was to improve ease and speed of navigation. "Time spent on the intranet is time spent not taking care of the customer, so easy access to content was a high priority," says Quinalty.

A secondary goal was to raise awareness about and usage of the intranet within the company. "Some departments were very excited about it, while others weren't aware of how they could use it," says Quinalty.

As speed of usage was a priority, the team set a maximum page size of 40Kb to ensure fast download (though it occasionally bends the rules for Acrobat documents).

### DESIGN PROCESS AND USABILITY ACTIVITIES

Efficiency is a high priority at Wal-Mart, and usability testing was seen as essential to ensure the intranet would be quick and easy to use. "Ninety-nine percent of our associates don't sit in front of a computer on a daily basis; they have to be able to get on, get the information they want, and get off quickly," says Quinalty.

The team used a wide range of methods to elicit user feedback during the development of the latest version of *Pipeline*, including Web-based surveys, cold calls to randomly chosen users, and visits to stores all over the country to talk to content providers and observe people using the intranet. Quinalty, Laura Hammarstrom, Michele Maestri, and James Marshall observed the users. Feedback from about 5,000 users influenced the new version.

Discovering user and content provider requirements took up five months at the start of the *Pipeline* redesign project. In March, work on the visual design started in parallel, and was influenced by user feedback about their information needs. Wal-Mart's in house designer came up with a series of design iterations. In the early stages, the team showed these static pages to nearly 100 people in the field — mostly sales staff and department managers in the stores — and sought their comments on both the functionality and visual appeal.

As the design neared completion, the designers conducted usability testing on a dummy click-through site with about 500 people, chosen to represent both a variety of job roles and locations, and experienced and new users. The team observed them as they attempted a series of tasks that involved locating certain pages within the site. Users were asked, for example, to find out how to order fixtures for their department or find information regarding a product recall.

The most significant change in the latest *Pipeline* version is the new role-based approach that takes users to the appropriate site area based on their log-in. This also involved restructuring the site so that unnecessary content layers were stripped out or relocated according to the user's needs.

"We brought the information that your position would require you to know to the front," says Schaefer. "It has been well received by associates in the stores, because they can just go straight in and get information to do their job, and only have to drill down at most two or three layers."

Feedback collected from users and content providers about the existing site was the major influence on the new structure. "We basically made the design based on what customers needed, but at same time supporting the information that the business says it needed to provide," says Schaefer.

Because of the simplified structure, the team decided that breadcrumb trails to show users where they are in the site were unnecessary.

Team members developed page templates in collaboration with the major content providers. "We worked with the business and sold them as much as possible on the concept," recalls Marshall. "We went to them, asked them what kind of information they wanted to convey, came up with a standard template, and got their buy-in."

The store's in-house designers created the visual design, once again informed by feedback from the users. It was also based on HCI best practice, culled from reading HCI literature.

A few early designs were rejected because the team felt their horizontal navigation style would not scale well as the site grew.

*Pictured: An early design that was rejected because the team felt the horizontal navigation style would not scale well as the site grew.*

*Pictured: Another early design that was rejected because the team felt the horizontal navigation style would not scale well as the site grew.*

"We were expecting there to be more and more topics to place on that horizontal bar, which would have meant either scrolling or using a very small font size in order to see all of the navigation," Schaefer explains.

The final clean, spare design is intended to maximize readability and minimize download time. "Like our stores, *The Pipeline* is a customer-oriented, business-driven site," says Schaefer.

It's also very much what users were asking for. The team found that a pretty face wasn't enough; people were less concerned with how the intranet looked than how easy and fast it was to use and what there was in it for them.

There is no horizontal navigation on the pages because users didn't seem to need it. "We tried a horizontal menu, but it simply didn't test as well," says Schaefer. "When we watched people, they always looked to the side, and that was true of new associates as well as those who were used to our old intranet structure."

In testing, users also seemed to be looking for a standardized view. There's a lot of cross trading between Wal-Mart's stores, and people want to be able to go into different areas of the site and get the same information in the same way. Departments do, however, have leeway on how they apply their branding, and are asked to choose their own photographic images for the top banner to help with brand recognition.

Content providers are given a standard template that lets them add their own content to the center panel, but imposes a maximum file size and provides key design elements. The font, crossheads, standard banner across the top, left-hand navigation, search, stock ticker, and weekly poll appear on all major divisional pages.

The poll is part of the team's drive to increase site usage by increasing interactivity. In a good week, the poll generates 15,000 responses, and it can also be used to improve aspects of the company's operations.

For example, a recent poll question related to a store promotion on textbooks for college students. The poll asked: "Where would you buy your textbooks for school? Campus Bookstore, Private Bookstore, Walmart.com? When users clicked on the *vote* button they were redirected to a page showing the poll results so far and a link to a page about the promotion.

"Our aim was to heighten store associates' awareness of this promotion," Schaefer comments. "We've recently asked questions about everything from the origins of our Father's Day holiday to whether or not you own a pet. The question is just a device to steer them to the content that we hope to emphasize."

In addition to producing templates that employees can use for producing content, the team has put a lot of effort into educating the business about how to communicate effectively with end users via the intranet, explaining the thinking behind the page templates and providing training in presentation and writing for the Web.

"It's a continuous learning effort," Marshall explains. "Most people who contribute to the site receive individualized training on using the software, and in some cases we run training courses, though we see it as educating rather than training them."

### TIMELINE

- Spring 1998: First Web-based version of the site goes live.
- Mid-1999: More operational information added.
- January 2000: *Pipeline* team gets go-ahead to redevelop the site.
- January–May 2000: Requirements analysis.
- March–May 2000: Design iterations.
- Summer 2000: Final testing.
- August 2000: Current version goes live.

### RESULTS

"The goal was to shave 50% of the time taken to find information. We think we've accomplished that, and the comments from the field are that they can find information faster," says Schaefer.

Web statistics indicate that traffic to the site has increased four-fold since the latest version was launched, indicating that the team has succeeded in its goal of increasing usage, while average time spent on line has decreased by 50%.

### LESSONS LEARNED

Insights from the designers:

**Learn the business before you build the site.** In this case, the designers went to the different stores, sat down with people, and studied both their tasks and needs in their own environment.

**Learn about your users, and listen to them.** The designers agree, "We opened their lines of communications any way we could."

# Park Place Dealerships

**Using the Intranet:**
Park Place Dealerships operates ten luxury automotive dealerships: eight in the Dallas-Fort Worth area, and two in Houston. They sell many types of luxury cars, including Mercedes-Benz, Lexus, Porsche, Maserati, Bentley, Rolls-Royce, Land Rover, and Jaguar.

**Design Team:**

In-house

**Member:**

Ryan Counts, programmer, designer, and database administrator

## SUMMARY

Just because you haven't done something before, doesn't mean you can't do it now.

Make that the slogan for the intranet designers at Park Place Dealerships, which operates ten luxury automotive dealerships in Texas. When looking for software tools to meet an automotive dealership's unique needs, the designers found existing off-the-shelf options to be severely limited. As a result, Park Place chose to develop its intranet and extensive sub-applications in-house. Today, the intranet features some forty-five applications: a custom help desk, a Client Concern Resolution (CCR) system, a service-scheduling system, action-plan and management-strategy tracking, training-class management, inventory management, and more.

While the intranet supports diverse tasks, one commonality is usage: most of the more than 1,200 employees use one or more intranet applications at least weekly, and almost half the employees use the intranet daily. "Our intranet has become the glue tying all of our other business applications and processes together," says Ryan Counts, Park Place's programmer, designer, and database administrator. "As a result, almost every employee utilizes the intranet on a weekly or daily basis."

By developing the applications in-house, designers had greater control over the applications' features and interface. "We've achieved a higher level of usability, simply because the users have direct access to the programmer," says Counts. "When a new application is requested, our process is to form a team of all principal users, and this team meets regularly with the developer and even assists in rollout, which has the added benefit of gaining internal 'evangelists' to promote the application's benefits to other users."

Today, when users log in, they all see a homepage divided into three columns. The information itself is ordered left to right, from most global to most user-specific. Thus, in the far left column, *Park Place News* highlights news of interest to all employees. The news might be anything from philanthropic and volunteer opportunities to recognition for years of service at the organization. This area can include news about any Park Place group or organization.

The middle column contains department news. For example, IT administrators can add, edit, or delete news that can only be seen by IT employees. Users can also add news simply by clicking a link and filling in a form. Users can also read archived news.

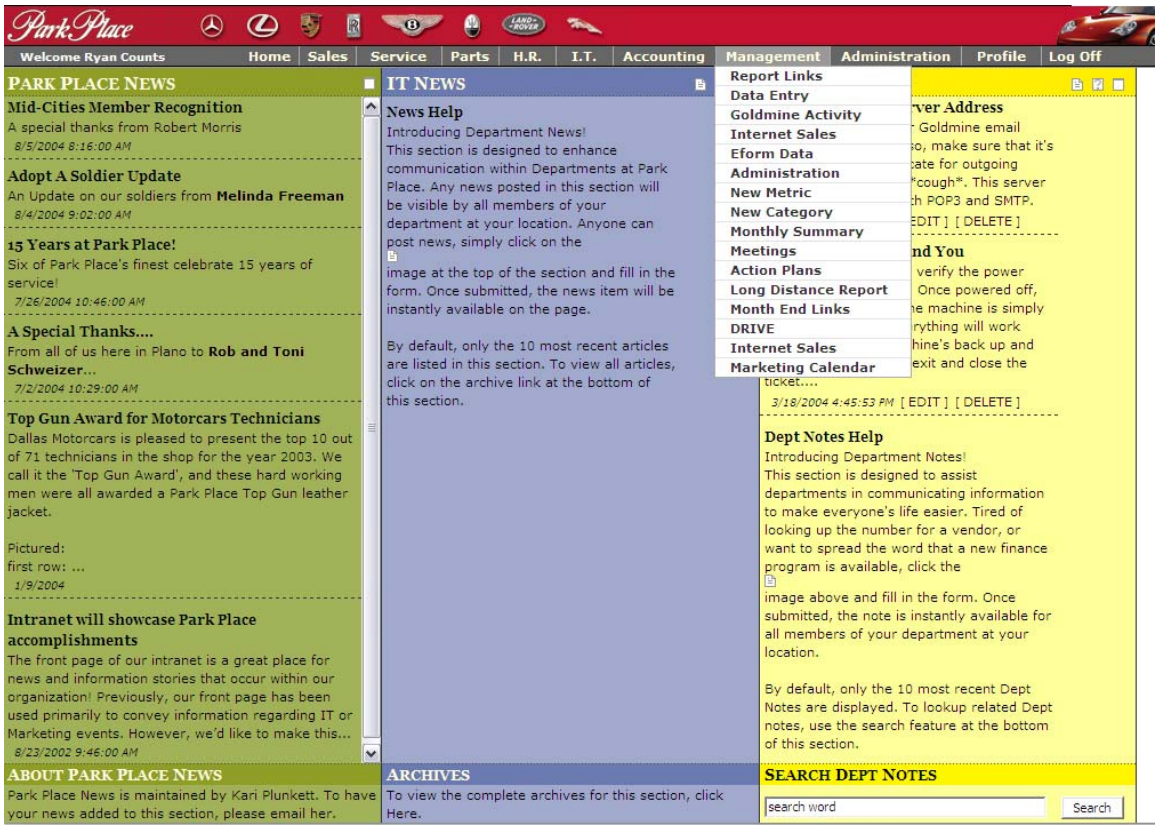
The far right column includes crib notes — a knowledge base for each department. Managers and IT administrators also administer this, and users can use the *Search Dept. Notes* feature at the bottom of the column.

Note that while the page's top header is branded for each location — displaying a picture of that location's main car brand — this will soon change. "In an earlier version of the intranet, the logos at the top went to the public-facing homepages for each of our dealerships," says Counts. "Our logs showed, however, that the links were rarely used, so they were removed, and we're currently working on a new revision that eliminates those logos entirely, since that real estate is too valuable to have no useful function."

Pictured: The Park Place Dealership intranet's homepage shows global company news in the far left column. The other two columns house information based on the user's department. The header reflects the user's location — in this case, the red Porsche indicates the Porsche dealership.

The top, horizontal navigation is simple and available on every page. Park Place found, through usability studies, that users could easily locate department-related applications through a department-name-based information architecture. This is rare; departmental names often don't facilitate easy navigation. In this case, however, the names provide users with clear-cut possibilities for what's underneath: *Home, Sales, Service, Parts, H.R., Accounting, Management, Administration, Profile,* and *Log Off*.

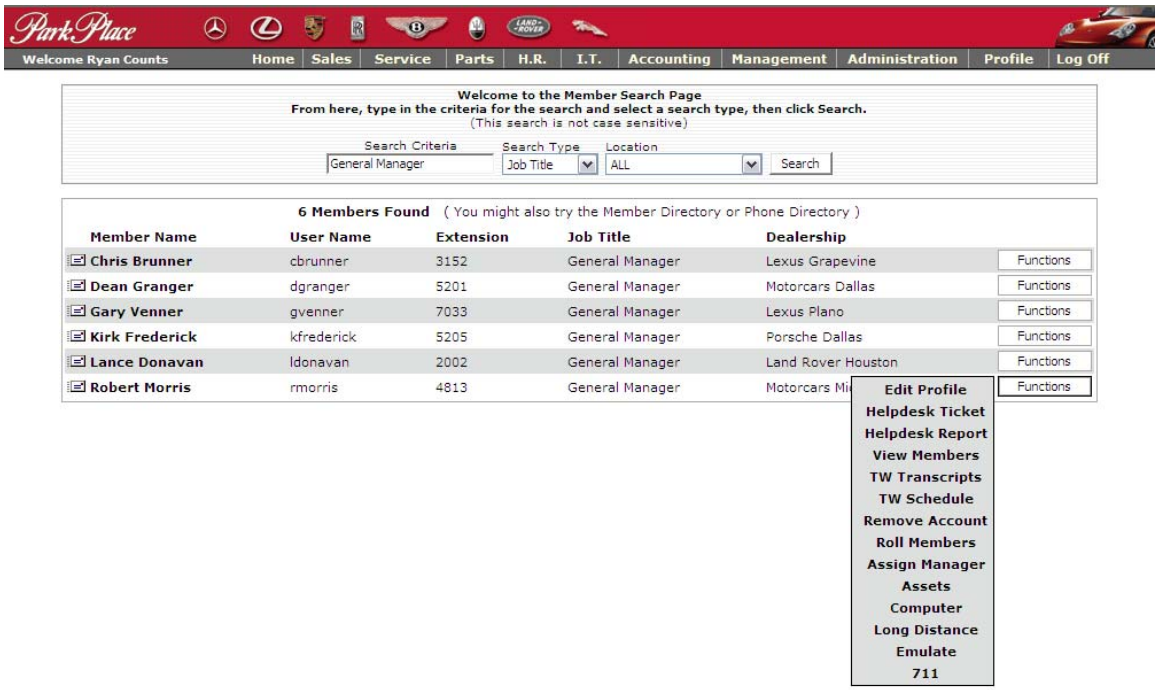
Technologically, the menus are simple CSS drop-down menus, and back-end programming renders only menu items that the logged-in user has permission to use.




Pictured: Menus are well organized. The top-level names are based upon departmental names, which usability tests showed gave employees clear-cut options.

Beyond the homepage, search pages allow employees to search by name, location, department, job title, or e-mail address. Search results display the user name, telephone extension, job title, and dealership. Clicking on the envelope to the left of a name creates a new e-mail message, addressed to the selected member.

The *Functions* button on the far right of each result lets administrators alter the user's account information. Using the inline menu, administrators can edit the profile, create a help-desk ticket, view the training schedule, view detailed specifications of the user's computer, review long-distance phone calls, view assets, assign a manager, and more.



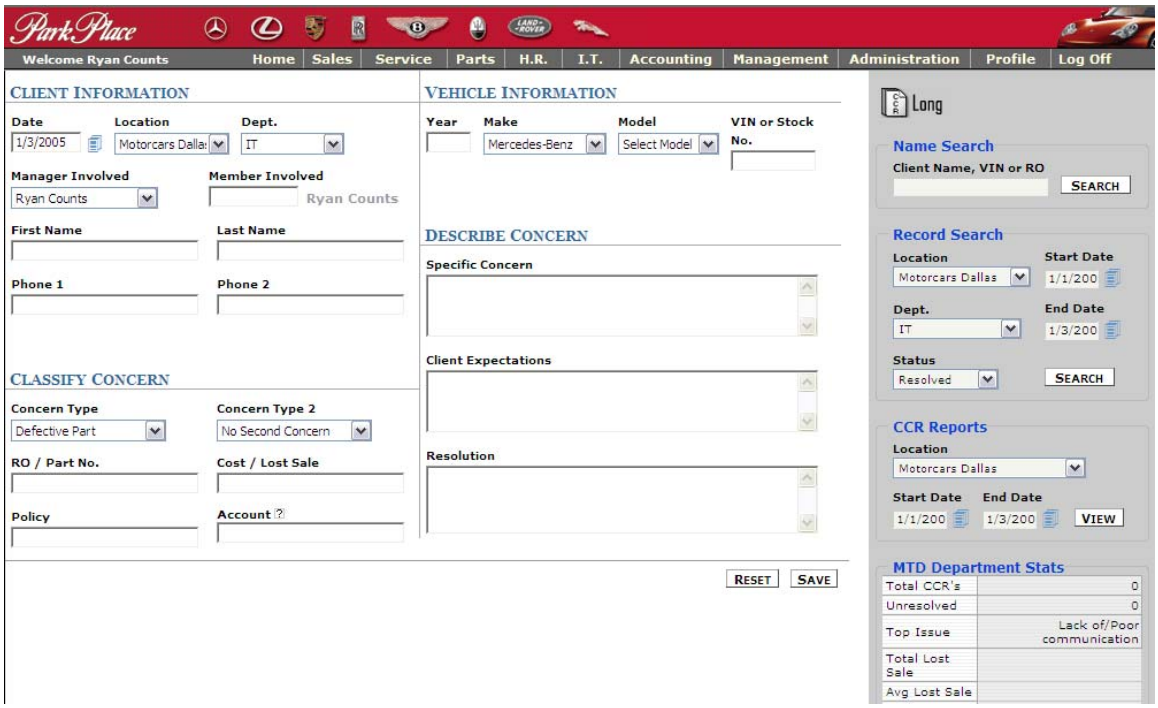

Pictured: Search results in the member directory display the user name, telephone extension, job title, and dealership. Clicking on the envelope to the left of a name creates a new e-mail message, addressed to the selected member. The *Functions* button lets administrators alter user account information via an inline menu.

Park Place's intranet highlights the organization's emphasis on keeping employees informed and productive, and constantly improving client satisfaction. On the latter front, whenever a client has a problem, members log the case in the CCR application.

When users select the CCR menu, a simple but thorough case form appears, requesting specific model and part information. The form also provides open spaces for users to elaborate on explicit issues. When possible, the application populates the form fields with default values based on the user's login.

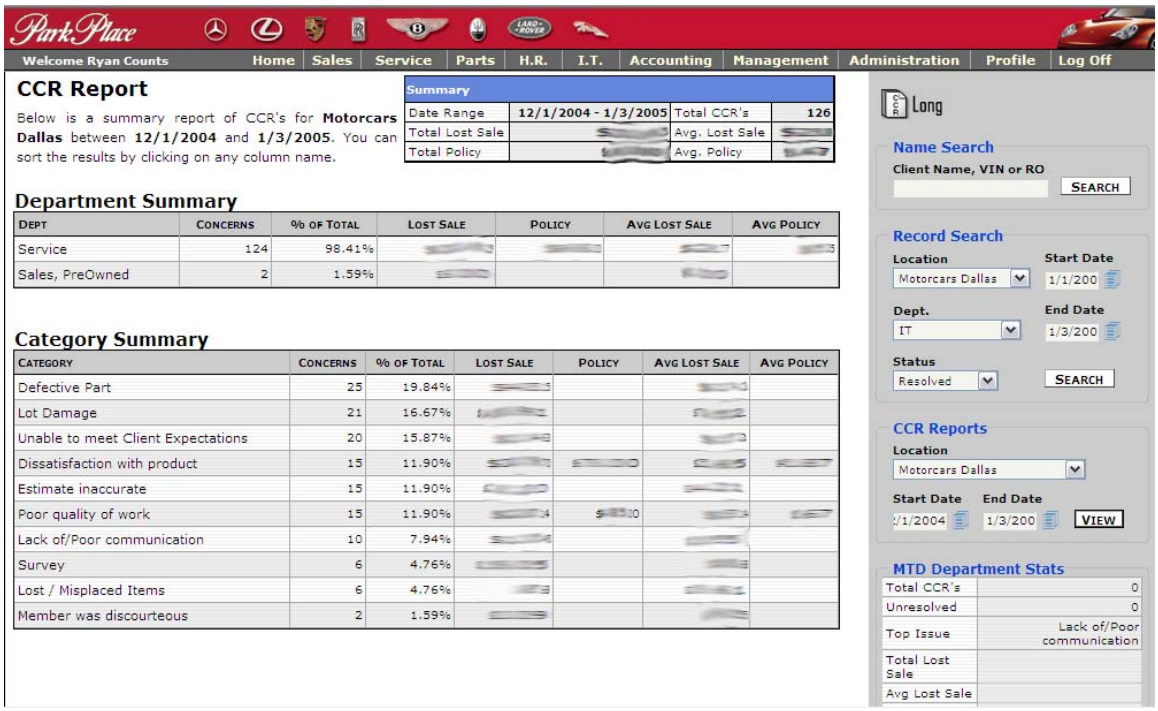
The *MTD Department Stats* area, in the bottom right, displays information based on the user's job title. Department managers, for example, see an overview of the MTD stats for their department, at their location; general and higher-level managers see an overview of their entire location.

Employees can also use the quick forms section on the right to generate reports, search records, and list unresolved CCR tickets. The section's bottom right side displays personal month-to-date stats for the current user. Having all of this information and all of these options in one place is very convenient.



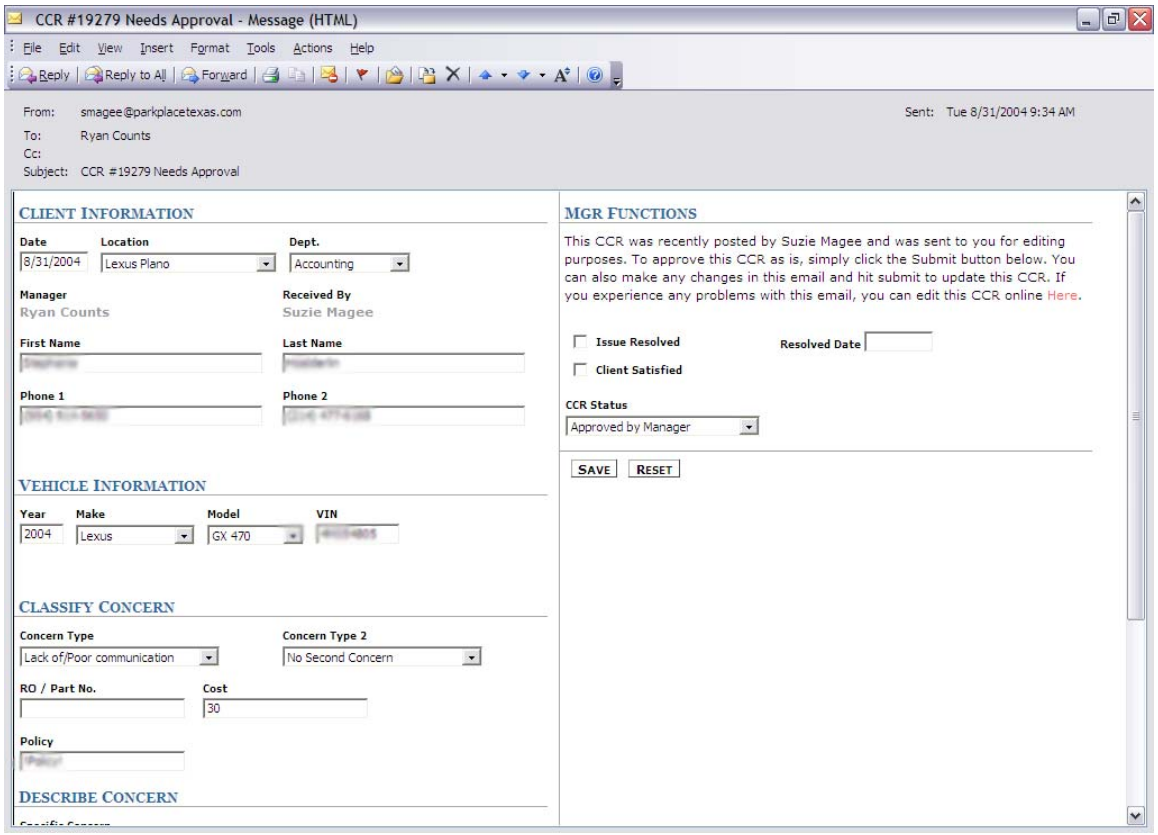

Pictured: Whenever they have a dissatisfied client, members log the case in the Client Concern Resolution application. The CCR case form is simple but thorough, asking for specific model and part information.

The CCR reports themselves are also quite helpful, and have an easily scannable table format. Each report begins with a summary view of the departments, followed by the types of concerns. Knowing which concern types are generating the most problems lets the organization isolate problem areas. Clicking on either a department name or a concern type drills down to a detailed summary of all tickets meeting the criteria. Users can also easily access quick report forms on the right, to do additional queries.




Pictured: A CCR report, beginning with a summary view of the departments and followed by the types of concerns. Quick report forms are also available on the right, so users can conduct further queries.

As soon as an employee enters a CCR, their manager receives an e-mail detailing the issue to ensure that every client issue is satisfactorily resolved. The manager can then review the situation, take action to ensure that the client is satisfied, and close out the ticket. If the CCR involves the services department, the application automatically sends an additional e-mail to the shop foreman, so he can act to resolve the issue as well. This might include adding additional work to the repair order, or talking to the technician involved with the client's car to make sure the client's needs are fully addressed. Because some locations have more than 100 service stalls, these e-mails help cut down on the time it would take to actually find the relevant managers or employees.




Pictured: As soon as employees enter a case in the CCR, their managers receive an e-mail with case details, facilitating a rapid follow-up with the customer.

One of the intranet's underlying design concepts is that critical information should proactively reach out to employees, rather than waiting for employees to find it. The CCR application is one example of this concept in action. Another is that department managers have critical reports waiting for them in their e-mail inbox every morning. These e-mails contain hyperlinks to the intranet with even more detailed information. As these two examples illustrate, many of Park Place's applications use e-mail to rapidly communicate business-critical changes or events to employees.

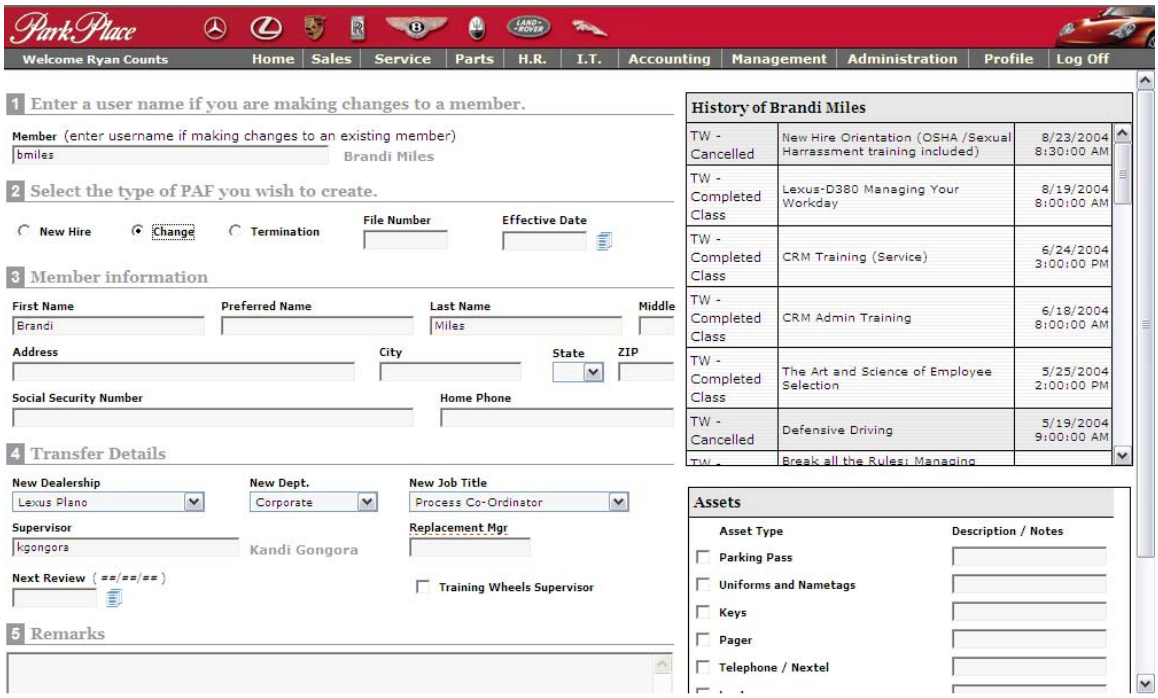
Not all automation, however, involves just e-mail. This is especially true for the HR department, which has a form to add, edit, and remove employees, or assign them assets such as uniforms, pagers, and cell phones. This functionality sits atop automated processes. For example, once an employee's name is added to the general HR information form, users click either *New Hire, Change,* or *Termination*, each of which triggers specific events.

When editing an employee's profile, a user sees the employee's complete HR-related history at the top right of the form.

If a new employee is being added, the HR form will create an intranet account for the new employee, send an e-mail notification to the payroll and IT departments, and register the employee for new-hire orientation. It will also automatically add a job ticket to send the employee a welcome packet.

When terminating an employee, the HR form triggers the deactivation of the employee's user account, and notifies the payroll and IT departments, via e-mail, to close the relevant network accounts, and reclaim any assets.

As a direct result of the HR application, and the related automation, the time it takes to prepare a new employee for work has been reduced from days to hours. Also, far fewer new hires are lost in the shuffle — they get needed account access and assets quickly, helping them get to work.




Pictured: HR personnel use this form to add and terminate employees, and to update employee information. When editing an employee profile, the HR staff can see the employee's complete HR-related history in the top-right area of the form.

While the intranet automates and streamlines many functions, some core business metrics simply must be manually entered every month. To facilitate manual entry, the data entry screen must be as easy to use as possible.

The Park Place intranet embodies this idea. For the business-metrics page, there isn't even a *Submit* button. Instead, as the cursor leaves each field, a simple JavaScript saves the information to a database, then analyzes the results. Users see real-time feedback, with color-coded metrics and an appropriate text explanation. Three icons to the immediate right of each metric's title provide even more context. Clicking the first icon, for example, opens a pop-up window that explains the business reasons behind the metric. The second icon opens a pop-up window that explains how the user should gather and calculate this metric. The final icon generates a year-to-date graph of the metric.

Pictured: A simple form expedites the entry of core business metrics each month. The data entry screen is as easy to use as possible. A simple JavaScript saves the information to a database and then analyzes the results to provide real-time feedback.

The detailed, mission-critical applications on the Park Place intranet make the intranet itself mission-critical for producing quality work. While home-grown applications can be more expensive than buying a canned solution, if the internal applications are as well-designed and useful as the ones at Park Place, it's well worth the time and energy to create and maintain them.

## URL AND ACCESS

The intranet's URL is http://intranet. All new PC builds include a shortcut to the intranet on the desktop, and some users make it their start page.

Mobile users can log in to the intranet through the company's external website. "We allow our customers to create logins on the website," says Counts, "but one piece of sneakiness — not advertised — is the same login authentication system handles both employees and customers, intelligently redirecting based upon the type of user authenticating." For security purposes, however, users logging in via the website cannot access financial information.

## CONTENT MANAGEMENT

At Park Place Dealerships, the same group designs, develops, and maintains both the intranet and the website. To serve both, they use a custom-designed CMS.

The CMS was originally written using Microsoft ASP, COM+ distributed component technology, and a Microsoft SQL Server database. While Park Place is keeping the existing database, it's currently transitioning to ASP.Net, plus C# for the front-end code.

When it comes to distributing content management, "because we are a relatively small company with a very small IT department, management of our content is distributed to each department as much as possible," says Counts. The CMS lets managers enter the rough outlines of content they want published, then routes the content to the intranet staff. The staff cleans up and enhances the text, ensures that it meets professional standards, and then publishes it. Along the way, a back-end logging system tracks all changes, allowing the intranet staff to revert to previous versions.

## TECHNOLOGY

On the technology front, "we are almost entirely a Microsoft shop," says Counts. That goes for the custom CMS software Park Place built, as well as the Web server and database server running the intranet — both are Compaq Proliant servers, running Windows 2003 Server.

The intranet is a custom application. Today, after two years of intranet development, it includes forty-five applications for such things as resolving client concerns and service scheduling.

For bug tracking, the intranet team takes three approaches. First, developers coded custom http 500 error pages. Besides telling the user that there's been an error, the pages also immediately e-mail the programmer all pertinent information. "We found programmers are much more inclined to fix a problem faster when their in box is flooded with error reports," says Counts.

The intranet team reviews server performance monthly to help isolate memory holes and slow pages. For harder to find problems, a periodic survey queries users' perceptions of performance and effectiveness for different intranet sections. "For example, three months after deploying the Client Concern Resolution application on the intranet, a survey was sent to the departments that most use the application," says Counts. "This aided in identifying opportunities for improvement, and helped us find a slight bug that wasn't showing up in error reports."

## GOALS AND CONSTRAINTS

Goals:

- Enhance interdepartmental communication.
- Reduce duplicate data entry.
- Redesign site navigation to increase available screen space.

## BASIC INTRANET FEATURES

The intranet offers a number of standard features, including company news, departmental news, a corporate phone book, and the ability to search for employees.

Park Place also custom-built forty-five applications to tackle discrete, previously time-consuming business processes. These applications cover such things as the help desk, resolving client concerns, scheduling service, action plans and management strategy, new employee hires, training classes, and Park Place's inventory.

## USERS

Park Place has ten dealerships and more than 1,200 employees, including HR managers, sales consultants and managers, automotive technicians, call-center representatives, valets, body-shop estimators, and accountants.

## USER TASKS

Some common user tasks include:

- Search for employees
- Reference the internal phone book
- Read company and departmental news
- Add new employees to HR, payroll, and IT systems
- Enroll in new-employee orientation classes
- Contact the help desk
- Resolve client issues via the CCR system
- Track inventory

## BACKGROUND

The groundwork for the Park Place Dealerships intranet began in 1999, when the organization needed to revamp how it tracked clients' issues and resolved problems. The goal was to reliably track and report on customer service weaknesses.

A search of off-the-shelf software, however, turned up nothing. "Unfortunately, the automotive industry is technically about five to ten years behind all other industries," says Counts. "As a result, there is a limited set of options when it comes to business applications that target the specific needs of a car dealership."

Park Place decided to build its own intranet, starting with basic intranet functionality and then adding applications to address significant business problems. "Since then," says Counts, "our intranet has largely been a product of two words: 'what if.'"

The first application was the CCR. When its early versions succeeded, departmental managers began asking what else the intranet could do. "Park Place is fortunate to have a large number of managers who actively seek ways to make their departments more efficient," says Counts.

Not every proposal ends up as an application. One question they ask before creating a custom application is, “Will it streamline a manual, time-intensive business process?” One such process was tracking vehicles after they’d been sold. Before a customer could take delivery, the vehicle had to visit between two and four dealerships for final touches. During this process, the make-ready manager — responsible for preparing a vehicle before it’s handed over to a client — had a difficult time knowing where a vehicle was at any given moment. Of course that’s not something a customer waiting for her Porsche wants to hear. To solve the problem, Park Place investigated whether existing hardware and software programs could track vehicle location, but the cost of available options would have precluded any return on investment.

So, Park Place began building its own application to track vehicles. “I built up an ugly first draft, focused on the functionality, in a couple of days. Then the manager used it for a couple of days, and we got together to discuss what worked and what didn’t,” says Counts. “Based on his feedback, we went through a period of daily updates until he was happy with the product, and that’s when we started rolling it out.”

Development took only three weeks, and cost dramatically less than commercially available options. “We ended up building a simple check-in and check-out system on the intranet for a fraction of the cost,” says Counts.

As the inventory-tracking solution illustrates, many of the business processes that the intranet solves don’t seem complex. “Most of our applications have turned out to be deceptively simple, some taking less than a week to develop. Yet a simple application, targeting the often overlooked details of a process, can have a considerable impact on the business efficiency of a department,” says Counts.

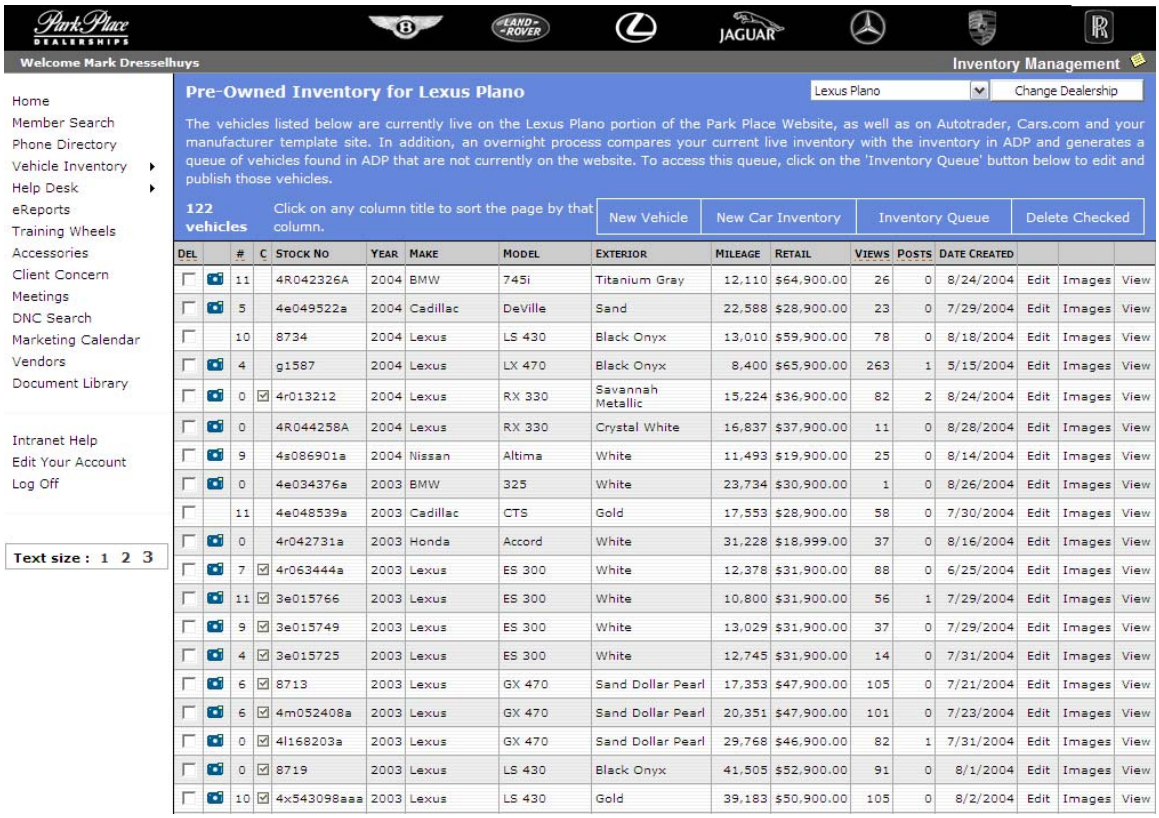
Currently, the intranet staff consists of one person who reports to the corporate IT department. The intranet staff once had three people, including a project manager, programmer, and content coordinator. “This lasted for about six months, after which the project manager position was eliminated, and the content coordinator was promoted out of our department,” says Counts. The dealership is currently looking for a new content coordinator.

Currently, the intranet budget “is confined to the salaries of the personnel involved,” says Counts.

## DESIGN PROCESS AND USABILITY ACTIVITIES

For the latest redesign, begun in April 2004, Park Place wanted to address two weaknesses. First, because intranet applications were grouped in a vertical menu, as the number of applications grew users had difficulty finding them under the existing headings. “We reached a critical mass of links and when watching people use the intranet, we started noticing they were having increasing difficulty finding specific applications.”

The second problem was that the vertical navigation bar had grown too much. “Approximately 95% of our applications do not require the user to scroll vertically, but this was becoming increasingly difficult to maintain because the navigation region ate up too much space,” says Counts.

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| | | 10 | | 8734 | 2004 | Lexus | LS 430 | Black Onyx | 13,010 | $59,900.00 | 78 | 0 | 8/18/2004 | Edit | Images | View |
| | | 4 | | g1587 | 2004 | Lexus | LX 470 | Black Onyx | 8,400 | $65,900.00 | 263 | 1 | 5/15/2004 | Edit | Images | View |
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| | | 9 | | 4s086901a | 2004 | Nissan | Altima | White | 11,493 | $19,900.00 | 25 | 0 | 8/14/2004 | Edit | Images | View |
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| | | 11 | | 4e048539a | 2003 | Cadillac | CTS | Gold | 17,553 | $28,900.00 | 58 | 0 | 7/30/2004 | Edit | Images | View |
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| | | 7 | ☑ | 4r063444a | 2003 | Lexus | ES 300 | White | 12,378 | $31,900.00 | 88 | 0 | 6/25/2004 | Edit | Images | View |
| | | 11 | ☑ | 3e015766 | 2003 | Lexus | ES 300 | White | 10,800 | $31,900.00 | 56 | 1 | 7/29/2004 | Edit | Images | View |
| | | 9 | ☑ | 3e015749 | 2003 | Lexus | ES 300 | White | 13,029 | $31,900.00 | 37 | 0 | 7/29/2004 | Edit | Images | View |
| | | 4 | ☑ | 3e015725 | 2003 | Lexus | ES 300 | White | 12,745 | $31,900.00 | 14 | 0 | 7/31/2004 | Edit | Images | View |
| | | 6 | ☑ | 8713 | 2003 | Lexus | GX 470 | Sand Dollar Pearl | 17,353 | $47,900.00 | 105 | 0 | 7/21/2004 | Edit | Images | View |
| | | 6 | ☑ | 4m052408a | 2003 | Lexus | GX 470 | Sand Dollar Pearl | 20,351 | $47,900.00 | 101 | 0 | 7/23/2004 | Edit | Images | View |
| | | 0 | ☑ | 4l168203a | 2003 | Lexus | GX 470 | Sand Dollar Pearl | 29,768 | $46,900.00 | 82 | 1 | 7/31/2004 | Edit | Images | View |
| | | 0 | ☑ | 8719 | 2003 | Lexus | LS 430 | Black Onyx | 41,505 | $52,900.00 | 91 | 0 | 8/1/2004 | Edit | Images | View |
| | | 10 | ☑ | 4x543098aaa | 2003 | Lexus | LS 430 | Gold | 39,183 | $50,900.00 | 105 | 0 | 8/2/2004 | Edit | Images | View |

Pictured: The old version of the intranet sported vertical menus on the left side of the page. An increasing number of applications made it difficult for users to find any of them, however. In addition, the vertical menu bar ate up valuable horizontal space and limited the design options.

The plan: do away with the vertical navigation bar. “Moving from our vertical menu to a horizontal menu was kind of a no-brainer,” says Counts. Park Place opted for a small, horizontal strip that wouldn’t require so much screen space. Because the horizontal bar had much less space for names, the intranet team grouped applications by departments. “Since each application was designed for a specific department’s needs, grouping by department just seemed a natural conclusion, which was reinforced in multiple discussions with users,” says Counts.

To test the menu order, Park Place created a group with members from each department, then did card sorting. Nonetheless, “we ended up organizing the menus by usage,” based on server logs, says Counts, putting the most-used applications on top, then tweaking placement for individual departments. “For the most part, the critical factor on the order of the menus was consistency. Once the user has gotten used to a link being in a certain spot, they start instinctually clicking that area without reading the link names.”

As this redesign scenario illustrates, when it comes to intranet design at Park Place, “the overriding design principle is KISS,” says Counts, and keeping it simple creates fewer problems in the long run. “Most of our users have very limited training and experience with computers,” he says, “so it’s absolutely essential that every page be as self-explanatory and easy to use as possible.”

Park Place's intranet redesign projects often begin as end-user requests. If approved, the intranet designers form a team of all principal users to articulate the requirements. The company's Business Excellence department also maps the business process or processes behind the application. "Usually, they are called in with a specific objective in mind, such as improving service revenue. They start by documenting the current process and use that as a guideline to determine areas for improvement, to build a new process specifically designed to meet the objective," says Counts. The development group follows this documentation as much as possible to ensure a streamlined process; it also meets regularly with the principal-user team to gather feedback.

One benefit of this approach is that a project simply takes as long as it needs to take — within reason, of course. "Since all of the people involved in process documentation, development, and training are part of our company, it really provides quite a bit of flexibility," says Counts. "We don't have to worry about strict budgeting, or time and contract restraints."

The team frequently waits until the beta stage — when the applications can actually be used — to test designs with users. "Working in a non-technical company, it's far easier to get people thinking about a project with a mockup they can see and use; wire guides and drawings have tended to be more difficult for our users to wrap their minds around," says Counts.

To ensure the intranet is easy to use, however, Park Place focuses especially on socializing developers and end users. "The key to making our applications as easy to use as possible is our communication, mixed with understanding of the fundamentals of usability," says Counts.

On the communication front, developers work in the same building as users. They thus see people actually using the applications, which helps the developers "actively participate in process development and application training," says Counts.

This development approach helps Park Place avoid what Counts sees as a too-formal approach to usability in many organizations. Calling for formal usability studies and formal user research at discrete development process stages, he says, leads to an on-again, off-again usability approach. According to Counts, less-rigid structures are needed. "By breaking out of a formal process, the process becomes free enough to fully integrate into the social atmosphere of development, and causes 'usability' to be less of a buzzword and more of a natural part of the development process."

Another usability aid: making developers train end users on their applications and demonstrate iterations to the principal user group. "By being forced to stand in front of a group of users and explain how to use a piece of software," says Counts, "user-flow kinks really begin to stand out."

The overall design process is iterative. During training, users pose "the questions that all-too-often fail to reach developers," says Counts, with the result that sometimes simple but overlooked solutions come to light. Another benefit is that users get to know the developers. "That familiarity encourages users to contact the developer directly with questions and solutions," he says.

Case in point: For redesigning the intranet's vertical menu as a horizontal one, the designers kept the new intranet in beta, gradually expanding the test group to sixty people, then "waited for the stream of suggestions to turn into a trickle," says Counts. That took about three months. Then, when the new intranet was ready to launch, Park Place promoted the redesign via an internal e-mail campaign.

Of course, a redesign doesn't stop there, and involving principal users in the development process means they assist in the rollout, then go on to evangelize the intranet's functionality.

## TIMELINE

- 1999: Revamped method for tracking client issues; began creating its own applications in-house
- June 2000: Rolled-out intranet
- June 2001: The intranet now contained three applications: an early CCR version, a help desk application, and an early version of a training management system
- April 2004: Began menu redesign
- June 2004: Began beta testing redesigned menus
- September 2004: Launched redesigned intranet and promoted it with internal e-mail campaign

## RESULTS

Today, almost half of Park Place's employees use the intranet daily, and most use it at least weekly. Driving that use is a design team open to users' ideas and feedback, and that designs applications to address specific end-user pain points.

Take page design, for example. While Park Place tries to maintain pages that require no scrolling, links to new applications and functionality in the old design were threatening to make vertical menus longer than screen contents. So, Park Place switched from a vertical to a horizontal menu bar. "By moving the menus to the top, we gained considerable screen real estate. The code change also decreased page-load times," says Counts.

Designers also reorganized menu contents to address users' navigation complaints. "After a little testing, we discovered that using departments to organize links was more intuitive for new employees, and it allowed them to more easily find needed applications." The new departmental headings include sales, service, parts, HR, account, management, and administration. The switch reduced the number of links from seventeen to ten, simplifying the interface.

Going forward, Park Place will increasingly rely upon its intranet — and of course, its website — to support the business. "Dealership staffs are going through an interesting transition as the old-school, stereotypical used-car salespeople give way to a new generation that relies more on technology," says Counts. "In sales especially, you have a new generation of staff looking more to the Web for customers than the showroom floor, and then to the intranet for support."

Central to meeting employees' needs is to never view an intranet application as finished. For example, Park Place might expand its make-ready application from just tracking cars during their post-sale preparation for customers, to also tracking its rental-car fleet. "For insurance purposes, using a PDA, we'd photograph vehicles when checking them out to a client," he says, then automatically store the images on the intranet.

Such tweaks bespeak an ongoing improvement process at Park Place. “I don’t like to think of any application as being finished,” says Counts. “There’s always an improvement to be made, and a fluid development process like ours makes it much easier to react to changing user environments and needs.”

## LESSONS LEARNED

Insights from Ryan Counts:

**Keep users involved.** “Having a casual conversation with a user when we’re out on a smoke break has often sparked ideas for improving a product. If users have ongoing input during development, it really increases their buy-in and use of the resulting application.”

**Foster developer–user conversations.** “Avoid having a brick wall between your developers and users. It’s important for developers to be as close as possible to the people that are using their software. While I’ve worked at several development shops with structured project plans, formal usability studies, and weekly status meetings, I’ve never developed better applications than I have while working in an environment where I simply have daily contact with people who are using my applications. Even in organizations with millions of users, have the developer e-mail a client or two.”

**Bake-in usability studies.** “Because of the expense and time required for formal usability studies, many organizations only conduct them on a quarterly or yearly basis. This is probably all right if you are only updating your code or content on a yearly basis, but most sites tend to change daily. For usability to be truly effective, it must be a daily part of the development cycle. You can’t just have a study, make some changes based on the results, and hope that it fixes your weaknesses. There has to be follow-up. And perfection is an evolutionary process; you can’t build it on a white board, and rarely by committee.”

**Don’t treat usability studies as scorecards.** “For formal usability studies, the development team needs to deactivate its ego. All too often — especially in non-technology companies — a usability study is treated as a scorecard for the application or website being developed, and people often cringe when a test subject fails to achieve a common task. Get over it: usability isn’t about right or wrong, but making things that work.”

**Localize usability results.** “Because of time and expense, usability studies often draw attention from senior managers. When those managers only read the executive summary, however, or lack technical expertise, and then involve themselves in the process, it can be counterproductive. So, while the development team — those doing the redesign work — need to hear the raw truth, outside of that department, I think usability study results should remain secret.”

# METRO Group

### Using the Intranet:

METRO Group is one of the world's largest international retailing companies, with 2004 sales of €56.4 billion and roughly 250,000 employees operating in approximately 2,100 locations in thirty countries. The company's well-known sales divisions comprise the operating business and operate independently. They include Metro/Makro Cash & Carry, world market leader in cash & carry wholesale; Real hypermarkets and Extra supermarkets; Media Markt and Saturn, market leader in consumer electronics centers in Europe; and Galeria Kaufhof department stores.

### Design Team:

Pleon GmbH

### Members:

**Pleon:** Britta Neisen, consultant; Tim Ulrich, art director; Alexandra Edelmann, screen designer

**METRO Group:**

Strategic work: Zygmunt Mierdorf, METRO Group's Networking sponsor, member of the management board, CIO, and vice president of HR; Petra Rob, general manager and head of corporate communications; Simone Schiffner-Backhaus, Networking project manager and head of new media.

Functional work: Andrea Guhrauer, webmaster; Uta Rösler, CMS; Bernd Rodde, editor; Kerstin Lengert, HR Self Services; Christoph Theile, Gallup Q12 Actions; Walter Dreuw, collaboration; Paul Greenstreet, E-Learning; Martin Gehrmann, management reporting; Andreas Visser, business procurement; Paul Kittel, corporate management information systems; Melanie Steffens, advanced retailing; Sylvia Borcherding, IT

## SUMMARY

To create METRO's Networking intranet, the designers carefully considered the company's two primary needs. First, it required a seamless user experience, despite multiple backend applications. Second, the intranet's design and structure had to serve twenty different METRO Group companies in thirty countries.

The designers delivered on both fronts. Along the way, they also had the opportunity to try new design approaches. Would designers without creative freedom have invented an interactive game—fully integrated into the intranet and in multiple languages—to successfully train employees about aspects of the business? We think not. Without such freedom, this intranet would not be what it is today.

## Homepage

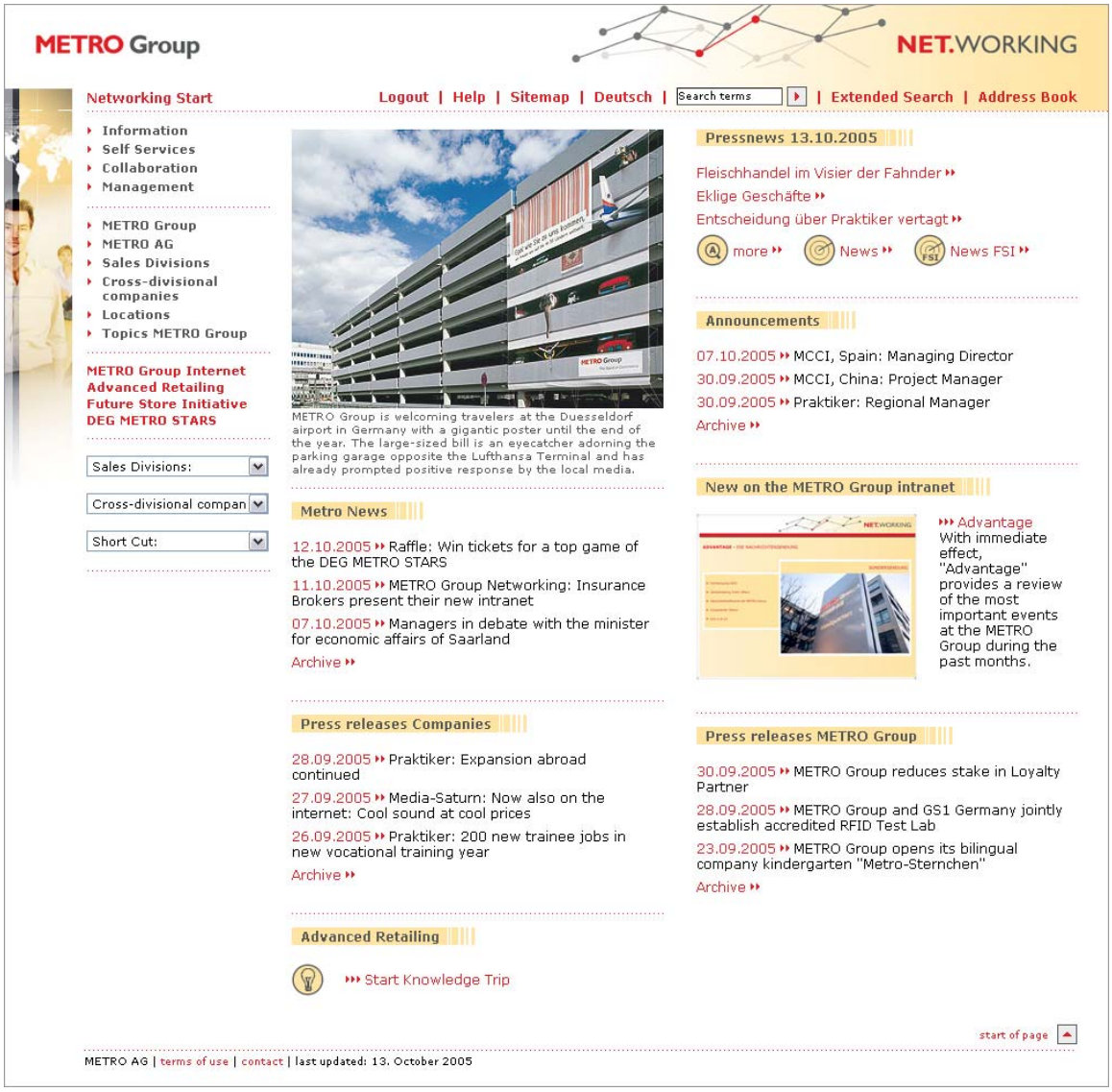
At METRO Group, the Networking homepage communicates all current METRO Group news, including corporate news *(Metro News)*, plus announcements and articles from the press *(Press news)*. There is also news about the intranet itself: *New on the METRO Group intranet.* An editorial team controls the content and placement of these and other news modules.

A large part of the homepage's top-middle section is dedicated to an ongoing news piece. The lower section of the screen is devoted to a photograph of a recent advertisement, along with a textual summary.

From the homepage, an always-visible horizontal navigation bar gives users access to an employee address book, search, extended search, and the sitemap. It also lets them set their preferred language—English or German.

The METRO Group includes several sales divisions, such as Real, and Metro Cash & Carry, that have their own brand identities. These companies use Networking's

structural and technical facilities with their own corporate designs. This approach ensures an efficient use of resources while maintaining both corporate identity and consistent design.




Pictured: The METRO homepage offers news and applications.

## News

The *Metro News* pages offer engaging content about the company. (Users can navigate to the news via homepage links or the left-hand menu bar.) Authors use bold-faced text to call out the most important sections, and crisp images support content. For special topics, such as statements from management board members or reviews of the most important events at METRO Group, Networking also offers users news in the form of video segments. Controls enable users to fast forward, rewind, and pause the segments.

- Information
  - Issues Mngt.
  - News & Press
    - Metro News
      - Metro News 1st Semester 2005
      - Metro News 2nd Semester 2004
      - Metro News 1st Semester 2004
      - Metro News 2003
      - Metro News 2002
      - Metro News 2001
    - Announcements
    - Press releases METRO Group
    - Press releases companies
    - Mobile News
  - Job market
  - Check lists
  - BKK
  - MYS
  - Corporate Design
  - Internet
  - Travel
- Self Services
- Collaboration
- Management

- METRO Group
- METRO AG
- Sales Divisions
- Cross-divisional companies
- Locations
- Advanced Retailing
- Topics METRO Group
- >Geschlossene Bereiche
- # Intranet (alt)
- >Schulungen

METRO Group Internet
Future Store Initiative
DEG METRO STARS

Sales Divisions:

Cross-divisional compan

Short Cut:

Information / 26.09.05 III

# Metro News 26.09.05

**"Company kindergarten as a sign for the compatibility of job and family"**

**In the presence of around 180 guests the METRO Group on 23 September 2005 opened its bilingual company kindergarten. Starting in early October, 65 children between the ages of 4 months and 6 years at the Duesseldorf campus in Germany will be cared for bilingually – in German and English.**

In his inauguration address Zygmunt Mierdorf, Executive Vice President Human Resources of METRO Group, stressed the commitment of the METRO Group to its corporate social responsibility. However, the kindergarten was not only built as a contribution to a more family-friendly society. "Naturally, in the first place we want to help our employees achieve a balance between their family and professional lives."

Joachim Erwin, lord mayor of Duesseldorf, in his speech labeled the construction of the company kindergarten as a "Renaissance of reason". Formerly it used to be normal that companies provide care for the children of their employees. Since public services are increasingly backing out of this area, creating new childcare centers represents an important social contribution.

Zygmunt Mierdorf: "This company kindergarten is an important investment into the future."

Zygmunt Mierdorf, Dr. Richard M. Hesch (German Red Cross Duesseldorf) and Joachim Erwin (lord mayor of Duesseldorf) officially opened the "Metro-Sternchen".

After the end of the official part of the inauguration the children took over.

**Playing, romping and learning**
After the end of the official part of the inauguration the children took over: Together with their parents they visited the new kindergarten for the first time that afternoon. The two-story building designed in warm yellow and red hues houses a total of four group rooms. Large windows make the rooms bright and friendly. Added to this are the dormitory and nursery rooms for the youngest as well as a handicraft room and a small gym. Free space for playing, romping and learning is also provided for in the outside area of the "Metro-Sternchen". A large slide leads from the first floor down to the climbing wall, sand box and tree house. On a walking school trail, the small children learn to make their first steps. The complete area is designed child-friendly down to the very last detail.

Red and yellow hues give the building a friendly touch.

"Metro-Sternchen" offers care to a total of 65 children

**Bilingual childcare pays tribute to the internationalization of the METRO Group**
The kindergarten of the METRO Group will open its gates in October. From then on 65 children aged between four months and six years will be cared for bilingually in both German and English. With this move the group pays tribute to the company's increasing internationalization. In Duesseldorf alone, people from 30 different nations are working for the METRO Group.

- More about the group's day care facility for children "Metro-Sternchen" more

Corporate Communications - New Media



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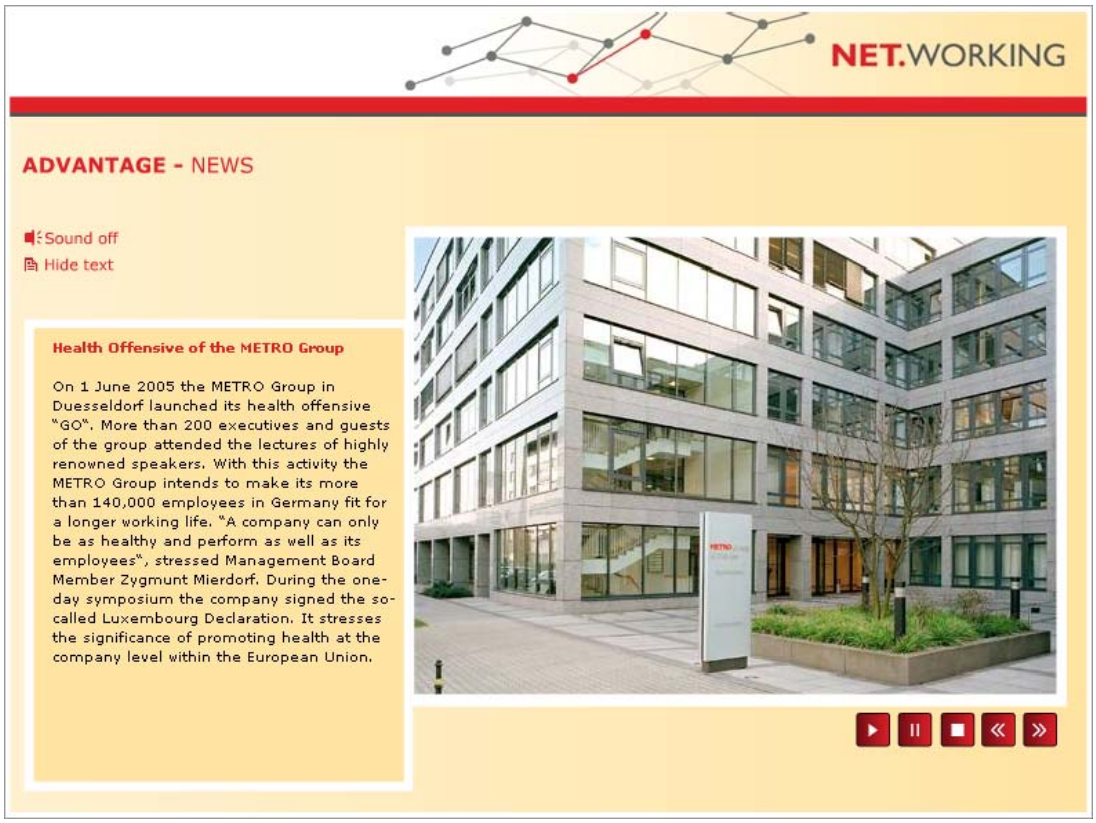
Pictured: News pages feature well-written text and photos, in this case including pictures of a company kindergarten's opening.




Pictured: Other news stories can offer engaging sound bites with video news.

## Navigation

On Networking, users have a complete overview of all companies and locations in the METRO Group. Even so, controls automatically limit access to those specific pages for which an employee is authorized.

This site's navigational structure deserves special mention. In general, crafting an information architecture, and more specifically, creating manageable menus, is a demanding business. With this in mind, the METRO Group's designers opted for a basic, tree-structure menu-navigation structure. In particular, they avoided fly-out and cascading menus, making navigation easier and less physically taxing for users, since they don't have to hold down a mouse button or carefully maneuver their mouse (without clicking), to reach nested navigation menus.

In the left-hand navigation bar, main content pages for a particular category open directly below the main menu item. Once a main content page link is clicked, the page displays in the main part of the page. To help users know where they are in the site, double arrows and indentations denote the selected categories and subcategories, and the link of the currently selected page is colored red. To further orient users, breadcrumbs also appear near the top of every page.

Networking also sports a major navigation enhancement: drop-down boxes on the start page that include quick links to the most frequently used content and applications.

Pictured: METRO Group opted for left-hand navigation that expands without "flying out." In other words, it doesn't cascade or require users to depress a mouse button to keep it open, making it easier and less physically taxing to use.

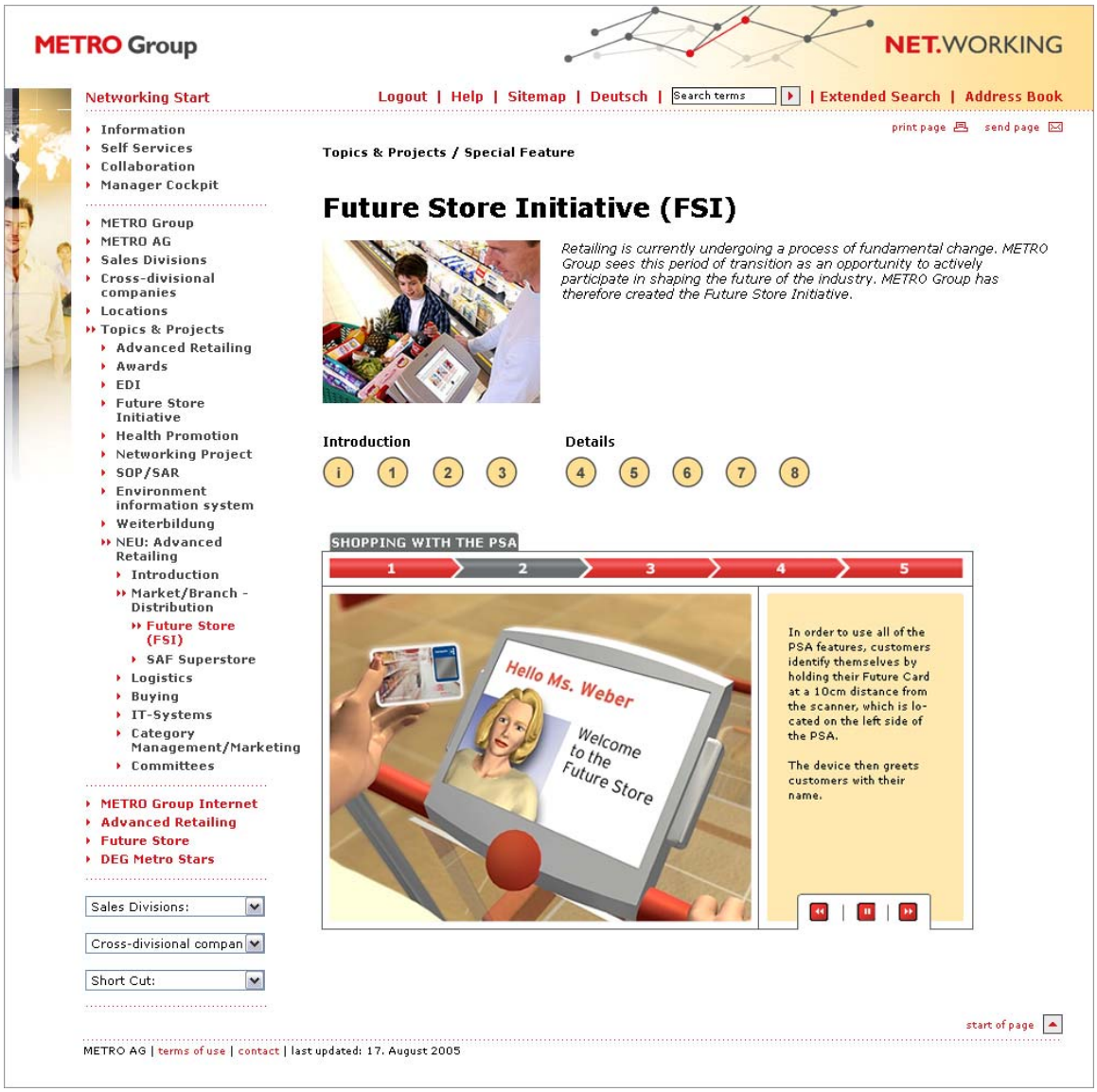
## Knowledge Transfer

For particularly abstract topics, designers chose to create Flash animations that illustrate topics using images, text, and animation aimed at appealing to users' various learning styles.

For example, the *METRO Group Future Store Initiative* clearly notes the topic's name above the screen, so users can easily refer to it. Buttons below the tutorial screen's main area give users further control over their session, including fast-forward, rewind, and pause controls. Generally, offering such features is important whenever you offer animation; it's especially so in an e-learning environment, where users may want to replay content, take notes, or pause to think further about a topic. Also, if users are well versed in a particular concept, control buttons let them quickly skip past it when reading a chapter.

As we've seen in our website studies, users get frustrated and bewildered when they lack sufficient control over online learning environments. In particular, users hate not knowing a tutorial's length—in pages or time—or where they currently are in the process. METRO Group's tutorials astutely avoid this problem by numbering each step in a red progress bar, and coloring the current step gray so users can quickly check their progress.

In addition to a simple, explanatory animation on the left, designers also employ supplemental text on the right side of the page. Having both text and animation can help many users, and also better facilitates learning for people who have cognitive, literacy, or auditory disabilities.




Pictured: A Flash animation leads employees through a concept, noting their relative progress through the module.

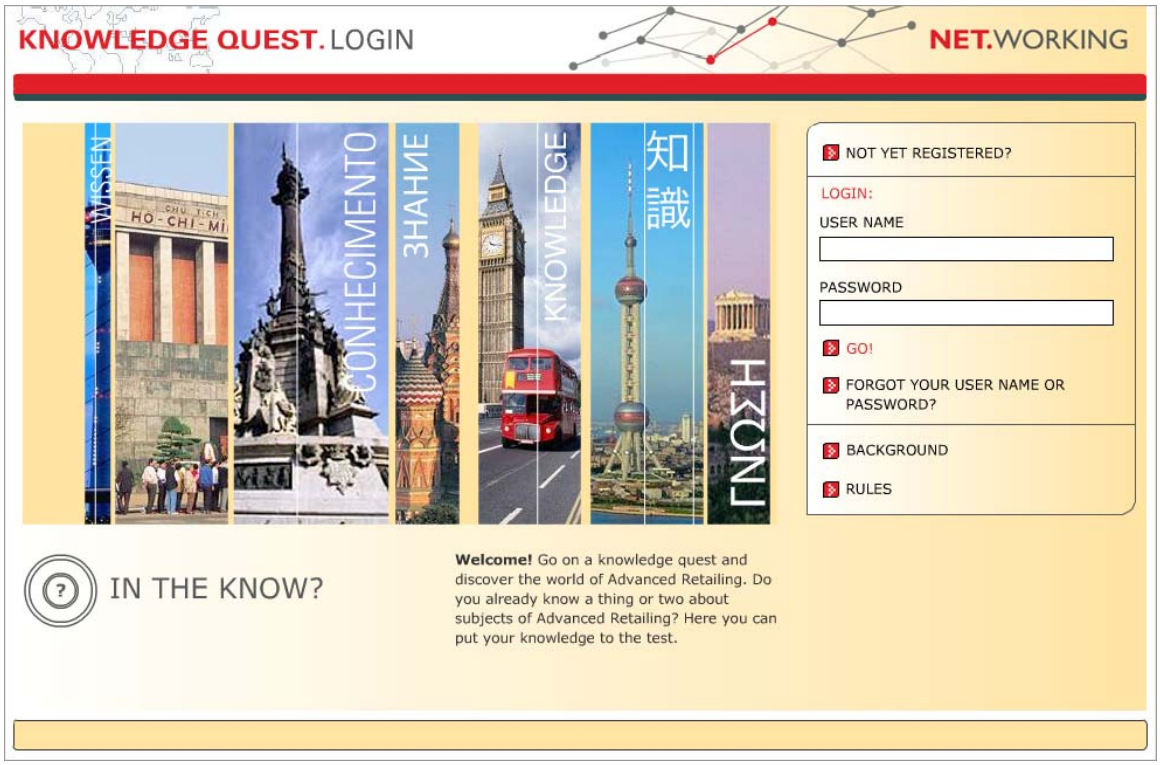
In a creative approach to online teaching and learning, the METRO Group's designers crafted a game in which participants travel through a world of large METRO control centers, and tour advanced retailing topics. The METRO Group offers the game as an incentive to improve employees' advanced retailing knowledge. For employees, however, the game is fun, and that's the main appeal. Another motivation, perhaps, is winning the game, at which point an employee receives a certificate of completion.

Pictured: This page contains background information about Advanced Retailing, and describes and links to the *Knowledge Quest* game.

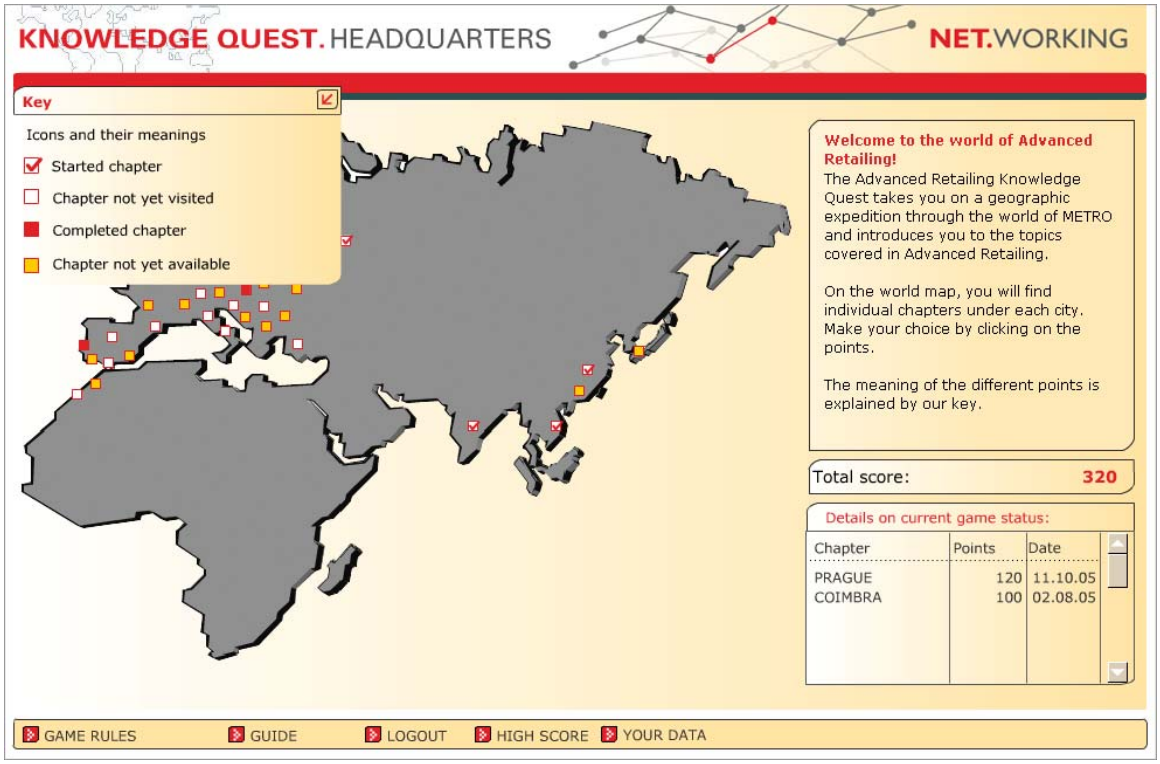
In the *Knowledge Quest* game, players must surmount challenges to reach a specific goal. Along the way, they get clues to help them solve the puzzles. This is important—users don't want to play a game they can't figure out. Of course, while a game's hidden treasures can be fun and challenging, hidden user interface controls are not. This game deftly avoids any such problems.

Throughout the game, a *Quest-Calculator* scoreboard reports the player's current score, as well as the maximum score (the score to beat). The latter adds a competitive edge to the learning environment.

At the bottom of the game, a control bar displays a *Game Rules* link so users can reference them while playing. The *Pause Knowledge Quest* link is easy to find, and a useful feature: If users are interrupted—say by an actual job-related task—they can click the link and avoid squandering their progress in the game.




Pictured: The login screen for *Knowledge Quest*.




Pictured: The *Knowledge Quest* welcome page shows current game status.

Pictured: The "Shanghai" chapter of *Knowledge Quest*.

Two things that make for a great intranet are innovation and attention to details. METRO Group designers consciously attended to both, and the results speak for themselves.

## URL AND ACCESS

Many Metro Group employees have the intranet homepage set as their default homepage.

## CONTENT MANAGEMENT

The METRO Group's CMS allows METRO Group's decentralized content editors to easily contribute material. The CMS runs on an Oracle application server and database, with XML as the internal data format. When content is served, it goes through XSL Transformation.

Various groups in the company helped design the new CMS technology, including METRO Group's new media department and the content systems department of MGI (METRO Group Information Technology GmbH). An IT supplier then developed the software in close cooperation with METRO Group. Previous CMS versions were already being used for the intranets of individual sales divisions, cross-divisional service companies, and the METRO Group itself.

Unlike the company's previous CMS products, the new CMS provides a single system for all authors. Group-wide, approximately 500 authors contribute content via the Networking CMS for the METRO Group intranet or its companies' intranets. One especially useful aspect of the METRO Group's CMS is the ability to store content in one place, then reuse all or parts of it on any METRO Group site. For example, all METRO Group companies publish recent corporate content on their intranets, yet the content is saved in only one location. "This way we reduce the work not only for creating, but also for maintaining, content," says Uta Rösler, project manager of the Networking CMS.

The CMS helps enforce many of METRO Group's design guidelines. "Enforcing design standards for intranet content has not been a problem, due to the fact that most standards such as positioning, fonts, and layout are already being managed by the content management system," says webmaster Andrea Guhrauer. Furthermore, a style guide details special formatting standards for things the CMS can't control. Authors are informed of any changes—and the importance of following standards—during regular events.

Pictured: A METRO Group news page combining text and photos.

## TECHNOLOGY

The intranet was visually designed using Adobe Photoshop. To construct and serve pages, the design team uses Java, Java Server Pages, HTML, CSS, Jakarta Struts, XML, XSLT, and JavaScript.

The main development tool is Eclipse, a free tool, and the team uses PVCS Version Manager for version management.

Development is performed on Windows machines that run a J2EE standalone application server locally. All developers' application servers are connected to a central developer database (Oracle version 9.0.2.4, soon to be 9.0.2.6).

Red Hat Linux on Intel-based Blades is the operating system for the testing, pre-production, and production environments, which contain partially clustered Oracle iAS, plus Oracle databases. To track bugs, the team uses Mercury Test Director.

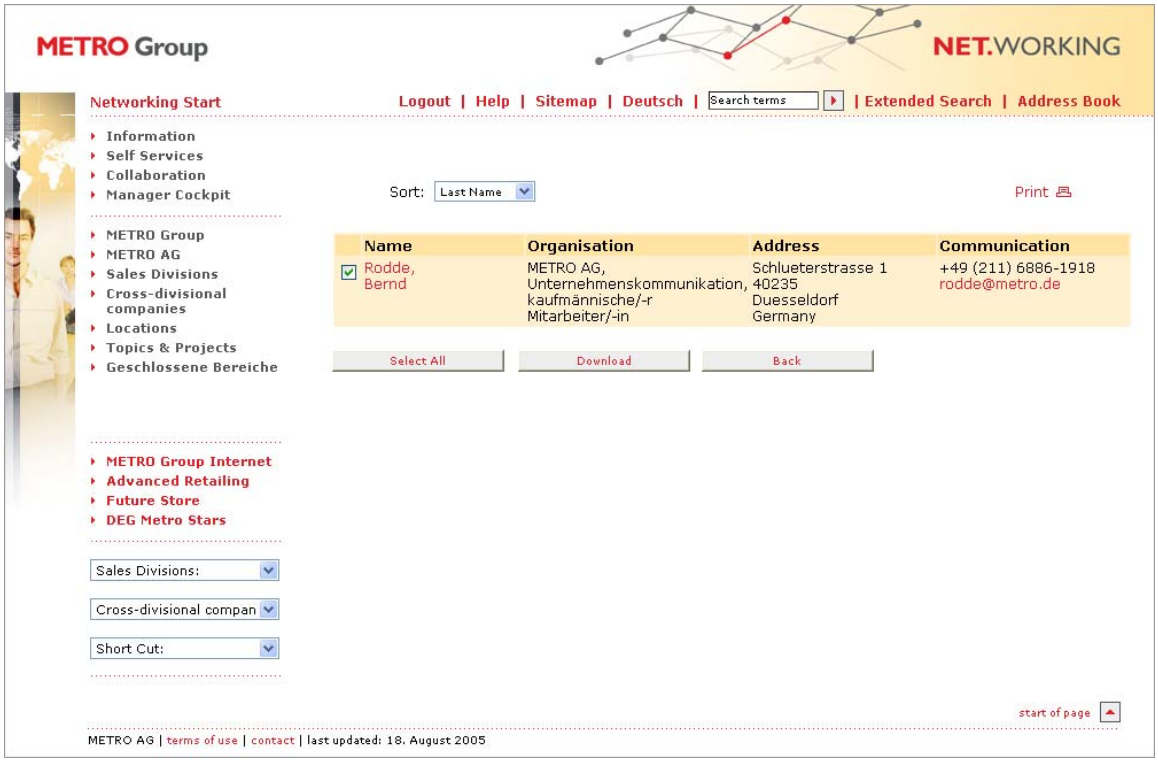
## GOALS

- Create a uniform work and information platform.
- Seamlessly integrate three technical systems.
- Standardize design, navigation, and technology throughout the intranet.
- Optimize the design to function on multiple platforms.
- Improve the intranet's usability.

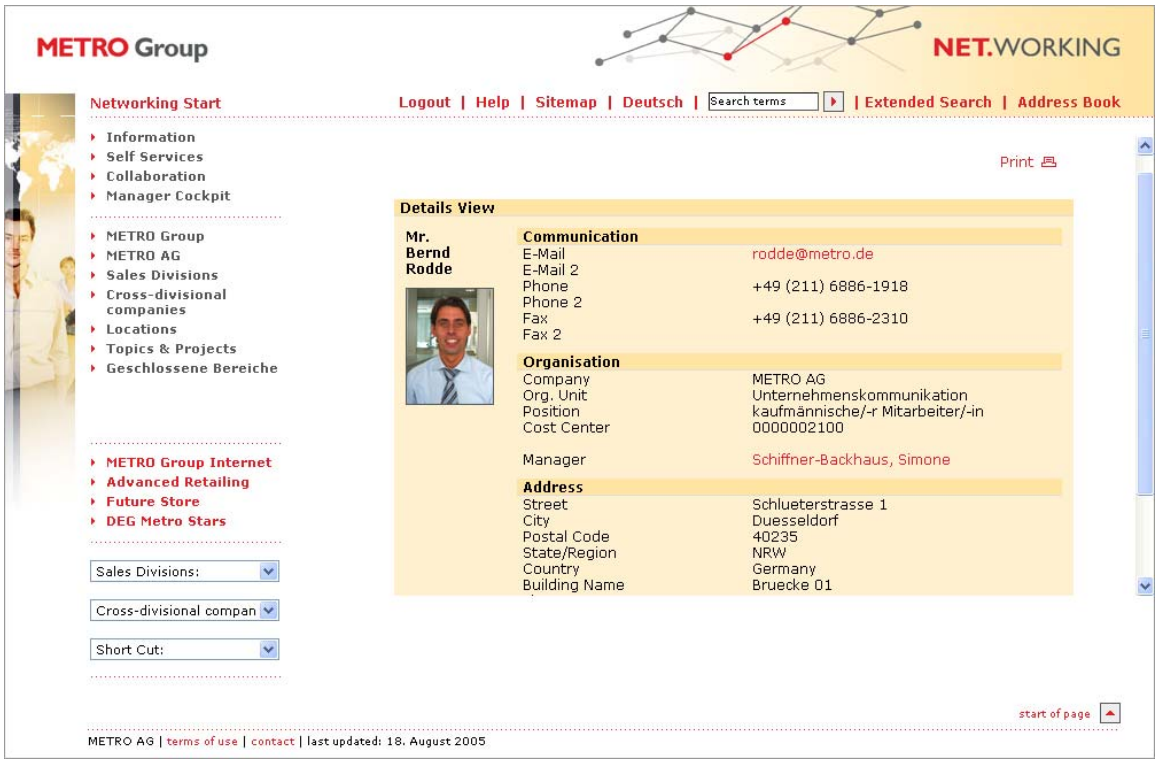
## BASIC INTRANET FEATURES

METRO Group Networking provides a uniform work and information platform for all personnel in all METRO Group companies and countries. As Simone Schiffner-Backhaus, Networking project manager and head of new media, notes, "We have designed METRO Group Networking as the 'single point of truth' for METRO Group personnel. In other words, this is where they find needed information, applications and communications resources for their everyday work. Our objective is to make access to information simpler for our employees, to foster social and trans-national collaboration within the group, and to map—and thus improve—internal administrative processes in Networking."

Networking offers users a variety of applications. Among them are the popular Networking HR applications, which include a group-wide address book and a vacation management and planning tool. Since the new site went live in June 2004, the tools has already handled over 10,000 vacation requests.

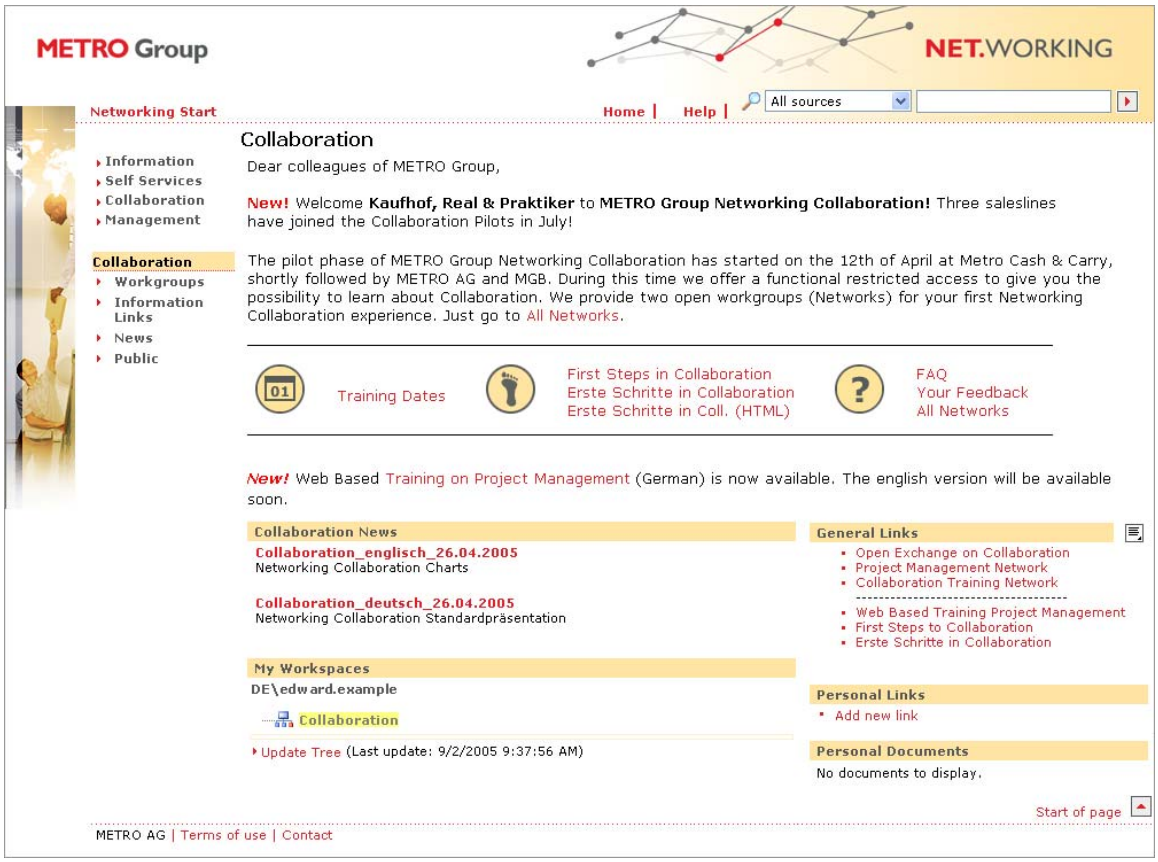



Pictured: The METRO Group address book contains the contact data for all company personnel. To help orient users, the design includes alternate-color highlighting and red hyperlinks for sending an email, seeing a full employee profile, and so on.



Pictured: A detail page from the METRO Group address book. Pages contain complete employee contact information in a clearly organized structure: the most important data—email, telephone, and fax—appear at the top of the page.

Another feature is *Networking Collaboration*, which provides tools and methodologies to facilitate collaboration across organizational units, companies, and countries.

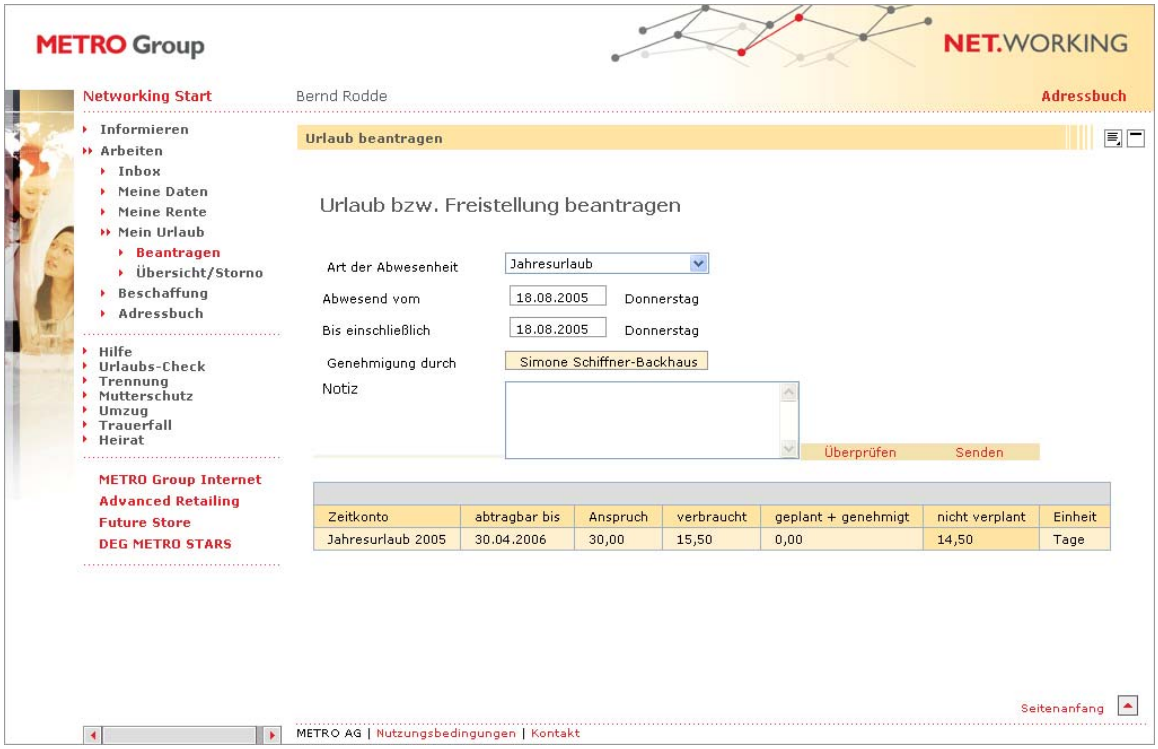



Pictured: Networking offers tools and methodologies for employees to collaborate across organizational units, companies, and countries.

A business procurement application gives employees an easy way to order office stationary, IT supplies, hardware, and other office essentials.

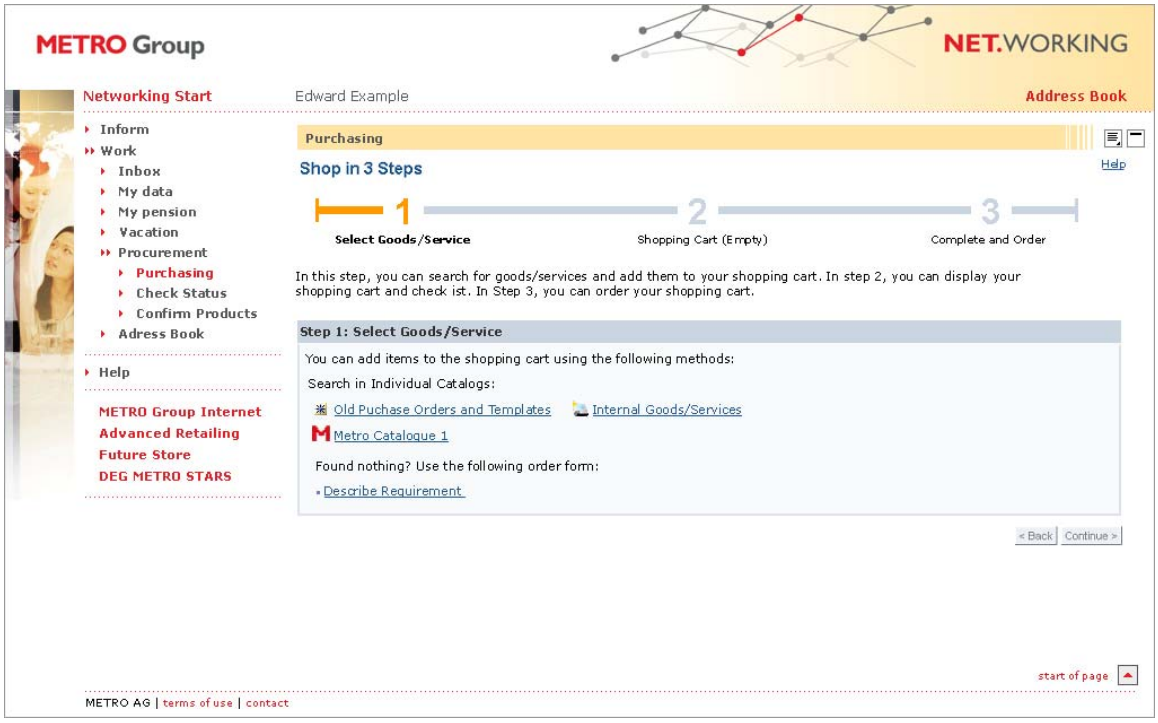
For posting announcements, Networking includes a virtual pinboard.

Networking also collects metrics and provides users with a business dashboard to analyze the data, facilitating information collection and the creation of reports for the METRO Group's managing board.




Pictured: The form employees fill out when requesting leave, which also displays their remaining vacation time.

The company's 150 personnel controllers rely on the intranet's international database, including HR data and key business information.



Pictured: A procurement page where employees can order office and IT supplies, and IT hardware.

Networking effectively integrates central and local content in one place. The look of Networking changes depending on the METRO Group business unit using it. Even so, changes are only layout-deep; the intranet's navigation, structure, and functionality remain consistent throughout the organization.

Pictured: An example of how Networking looks for one of the METRO Group companies (in this case, Real and Extra). While the layout has been designed to suit Real and Extra branding, the page's navigational structure and functionality precisely mirrors that of the wider Networking intranet.

## USERS

Currently, 57,000 METRO Group employees have access to the Networking intranet.

## USER TASKS

METRO Group employees' typical Networking-related tasks include:

- Read up on corporate news and news specific to METRO Group companies
- Look for information on a particular company-related issue, such as advanced retailing concepts
- Handle personal requests online, including vacation requests
- Collaborate with other employees in virtual team rooms
- Search for people or job positions in the company
- Order office and IT supplies, and IT hardware

- Conduct research
- For new employees, access checklists of essential orientation steps

## BACKGROUND

The original METRO Group intranet launched in 1998 and was designed purely as an information medium—a one-way path to get information to employees. Very quickly, however, the intranet began transforming from a static place to store information, to a work and information platform that helps employees do their jobs.

Even so, the homepage design had a static air: it included links only to broad news categories—not to actual news items—and its icons rarely changed. Sub-pages also relied on an abundance of icons, and were difficult to navigate.

On the technology front, the first intranet's design team used software that was not J2EE-compliant and did not run on a J2EE application server, which made it difficult to integrate with other enterprise systems. The template mechanism was also proprietary, and no instance of the previous software ran locally, which made testing more difficult. Changes had to be loaded onto a test server and vetted there.

Pictured: The METRO Group intranet homepage in the summer of 2004, prior to re-launch. The homepage was very static, partly because the latest news was accessible only after clicking one of the page's links. Also, changes to the image elements were rare.

## DESIGN PROCESS AND USABILITY ACTIVITIES

For the most recent redesign, the company largely moved away from the previous intranet version. With Networking, the METRO Group began to build a new, standardized work and information platform for all employees.

“Networking’s goals are to improve internal administration processes by providing better technical support, to accelerate the internal exchange of information, and to promote both cross-company and cross-divisional cooperation. In this context, processes are being standardized, so that increasingly complex tasks can be managed more easily,” notes Zygmunt Mierdorf, a member of the METRO Group management board, as well as the company’s CIO and vice president of HR. “For METRO Group, Networking is the workplace of the future.”

Networking is based on three “technology pillars”: the CMS, SAP ERP software, and Microsoft Sharepoint. The intranet implementation focused on maintaining a seamless link among them.

Within Networking, there are multiple sub-projects to improve specific functions: HR self services, Gallup Q12 actions (a twelve-question assessment of employee engagement levels designed by The Gallup Organization), content, collaboration, e-learning, management reporting, business procurement, corporate management information systems, and advanced retailing. General tasks, including IT, user interface, and communications, are also included in the Networking team structure.

The intranet redesign was largely handled by the online relations practice of Pleon GmbH in Germany. Given the short implementation timeframe, a group of experts—designers and consultants—was brought in at project launch to assess the current METRO Group intranet and analyze employees’ opinion of it. MGI, METRO Group’s IT service company, carried out the technical implementation.

With results in hand, the redesign team outlined intranet requirements and began the redesign process, quickly developing three potential design templates. The team says it drew inspiration from the design of the Networking logo, other intranets and websites, and browsing through design books and trade journals.

Ultimately, one template was selected and used to develop various, additional site templates. Initially, due to time constraints, the designers were unable to perform a usability test of the previous intranet. The very tight schedule also meant that the project had to sacrifice a detailed usability test—such as a testing of design prototypes—during the development phase.

After the intranet went live for some divisions, the redesign team conducted formal usability tests. The testing included a questionnaire to assess users’ PC and intranet skills, to help define different types of users.

Usability test questions focused on the following issues:

- What draws a user’s focus?
- Are users aware of the content and services the intranet provides?
- Are all technical functions used and are they clear to users?
- Are users satisfied with the information offered?
- Are users happy with the design and does it invite them to use the intranet?
- Do users find information where they expect to find it?
- Is the navigation structure clear and understandable?
- Is terminology clear?
- Is additional information necessary? Is any content missing?

While taking the usability test, subjects were provided with a list of tasks to accomplish. A moderator encouraged test subjects to think out loud during the process, while a minute-taker wrote down all observed problems during the execution of a task. In a final, standardized interview, the test subjects were asked once more to judge the intranet's usability and produce optimization suggestions.

At that point, the redesign team again brought in experts to assess Networking's design. The team used the results from both the expert and user evaluations to further hone the design.

Overall, the testers rated the design, information offered, navigation principles, and functionality very positively. In terms of color, typography, and visualizations, the design was described as being very appealing and clear-cut. The challenge of creating a standardized appearance for the various technological platforms was mastered, as proven during usability testing: while surfing, users did not perceive any disturbing changes when moving between various systems. In fact, only a few suggestions for improvement were submitted, for a few specific areas. Some users, for example, wanted the homepage to have a stronger visual focus.

The new pull-down menu, which gives users direct access to certain subject areas, also tested very well with users. One potential problem, however, was with the names of some menu items. The team plans to tackle that issue in the next redesign.

## TIMELINE

- 1998: Launched first intranet.
- 2000: Redesigned first intranet.
- 2002: Redesigned second intranet.
- May 2004: Began third redesign project.
- September 2004: Launched third redesign

## RESULTS

The latest version of Networking launched in September 2004. "With Networking, the METRO Group enables its employees to have quicker access to up-to-date information, take less time to carry out purely administrative tasks, and easily share knowledge within the group," says Schiffner-Backhaus.

Networking quickly gained acceptance with employees, as it features significantly more topical content than the prior intranet. To date, 57,000 employees have access to the intranet, and twenty METRO Group companies use one or more of the Networking applications.

Today, METRO Group Networking supports the METRO Group companies by: making concentrated information available in one place; providing information quickly and with high topicality; mapping administrative processes in a standardized and technical form; and fostering employee collaboration.

Furthermore, the intranet makes cost synergies possible—through office supply procurement, for example. It also reduces duplicate work by sharing knowledge more effectively. In line with Networking, the company also adjusted and simplified its IT infrastructure.

## LESSONS LEARNED

Insights from the METRO Group Networking team:

**Always evolve.** "Transitioning the intranet from a purely informational medium, to a place where employees can both retrieve information and also work, became an economic imperative. Networking is evolving to become an even more important instrument for optimizing and improving the efficiency of internal administrative processes."

**Orient employees.** "To foster users' acceptance of the intranet, we use a fast orientation process, and also maintain a consistent user interface. This allows us to add different, technical systems as needed, without changing the intranet format—or the user's experience. In this context, a clearly laid-out structure with a clear delimitation of the navigation levels is also essential. Last but not least, innovative and interactive design elements increase the attractiveness of Networking and thus its acceptance by the users. Never underestimate the importance of clear design."

# Staples

**Using the Intranet:**

Staples Inc. invented the office superstore concept in 1986 and today is the world's largest office products company. With 65,000 talented associates, the company is committed to making it easy to buy a wide range of office products, including supplies, technology, furniture, and business services. With 2004 sales of $14.4 billion, Staples serves consumers and businesses ranging from home-based businesses to Fortune 500 companies in twenty-one countries throughout North and South America, Europe, and Asia. Headquartered outside of Boston, Staples operates approximately 1,716 office superstores and also serves its customers through mail-order catalog, e-commerce, and contract businesses.

**Design Team:**

In-house

**Members:**

Ben Cornish, learning technology manager; David Evans, design manager; Tim Semen, usability project manager; George Levesque, portal strategy project manager; Margaret Woisard, portal strategy project manager; Lindsay Germanos, portal strategy project manager; Curran Leahy, business consultant

## SUMMARY

The Staples@work intranet houses a wealth of tools, many designed to facilitate some of the company's most-critical business activities. Even so, the Staples@work designers favor a simple presentation throughout, so employees can get the tools they need to maximize their productivity without distractions.

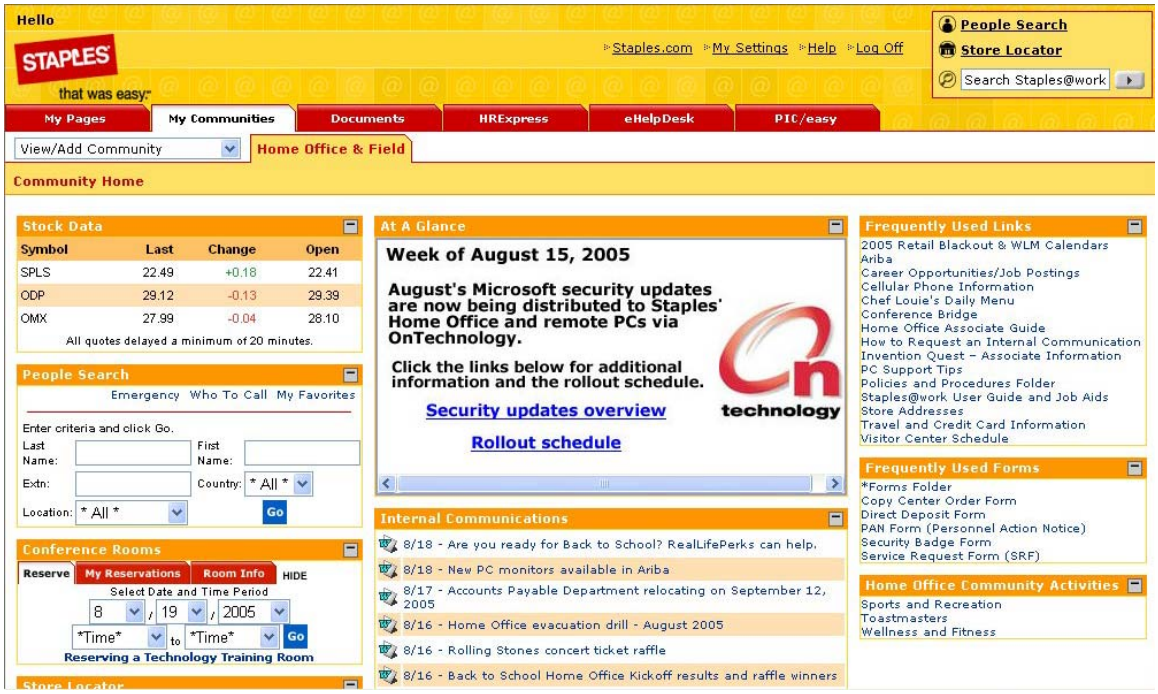
### Homepage

The Staples intranet homepage offers all of the features employees might expect from a homepage: news, employee directory, announcements, and links to frequently used intranet areas. After users log in to the intranet, it gives them personalized content and grants access to relevant content stores.

Users can also access communities and sites dedicated to different company project teams. Another feature lets them add their favorite communities to an easily accessible drop-down list.

The homepage keeps employees—known at Staples as *associates*—informed about company activities and news. They can also access online benefits information and enrollment details, search for store addresses and staff phone numbers, reserve conference rooms, or sign up for training. In addition, all employees have access to the *eHelpDesk* page, where they can perform such tasks as submitting work orders and checking the status of various systems.

Overall, the look of the homepage mirrors the corporate branding and color scheme. Even the well-known corporate tagline—"that was easy" appears on the homepage.

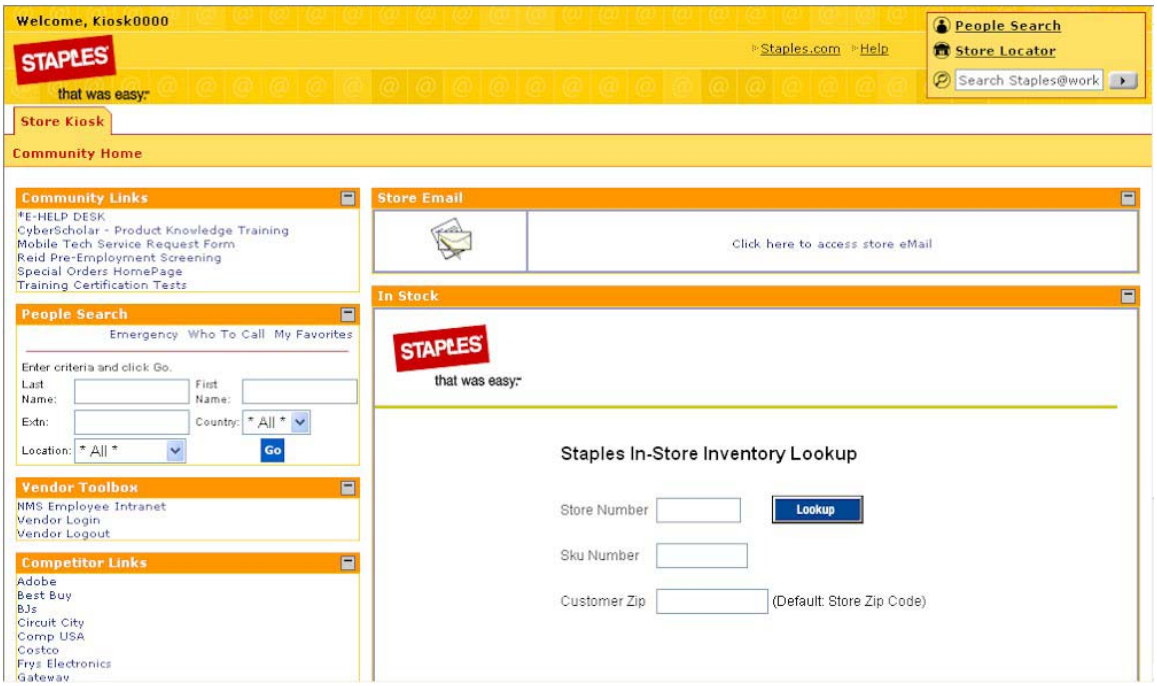



Pictured: The Staples homepage offers all of the features users expect from a homepage, clearly presented and designed to mirror corporate branding standards.

## Supporting Store Employees

Staples@work is a useful tool, both for the Home Office employees and those who work in the actual stores with customers. Using online training tools, store employees can learn about new products, access store and divisional financial reports, and even print out instructions for setting up displays and promotions.

Using kiosks on the sales floor, store employees can access a “locked-down” portal version to assist customers by looking up inventory or generating price comparisons with competitors’ products. To ensure easy viewing, all store-facing pages are limited to two columns, since many store employees view the portal on relatively small computer screens.




Pictured: Employees can access a locked-down version of the portal when assisting customers on the store floor.

Here's one example of how the locked-down portal works: A customer approaches a store employee requesting a product, and the employee looks it up using the portal. When the employee discovers it's not in stock, she can further determine which stores have the product in stock and—using the intranet's *Store Locator* tool—easily give the customer directions to any of 1,680 Staples stores.

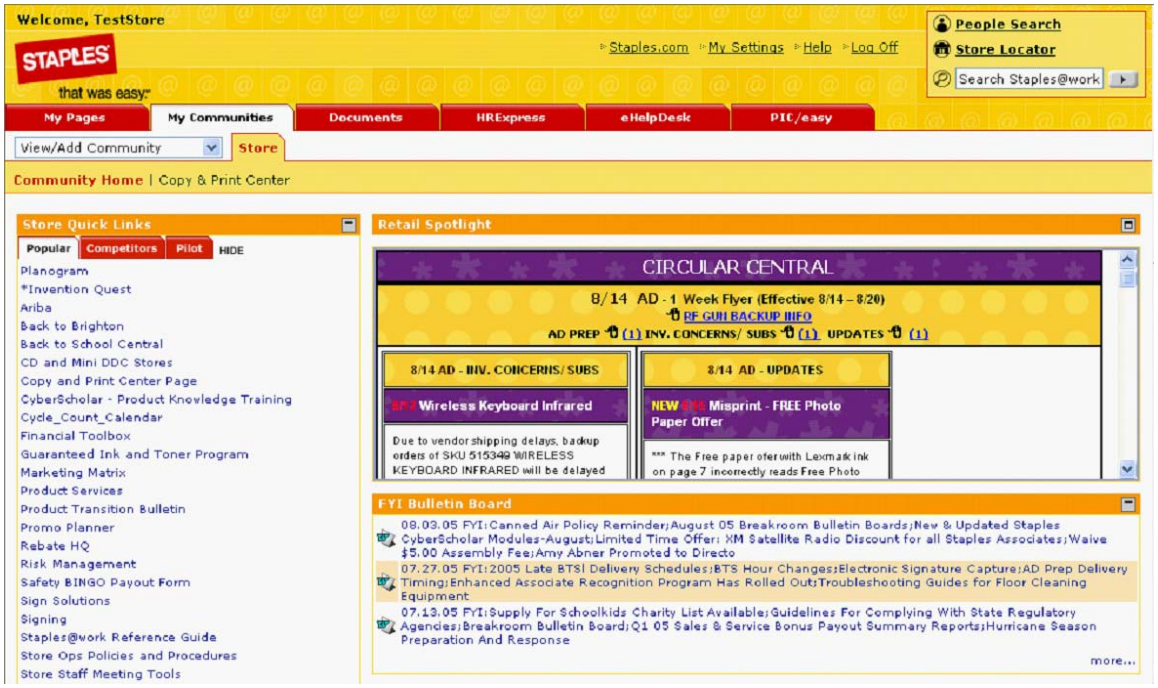
Employees can also use the *Store Locator* to search for a store city, state, zip code, or store number. The clear design effectively communicates which items need to be entered to run a search. Or, as an alternative to searching, employees can click the *Regional Listing* to browse a list of stores.

Pictured: The *Store Locator* tool makes it easy to find a specific store, clearly communicating which variables must be entered to run a search.

Beyond such tools, store employees also have their own, dedicated intranet section: *Store*. This area supplies them with the information they need to best meet customer needs. For example, the page's main content area, *Circular Central,* highlights products listed in the current week's circular—always a subject of customer interest. Such information helps store employees better respond to customers' likely questions, as well as make specific product recommendations.

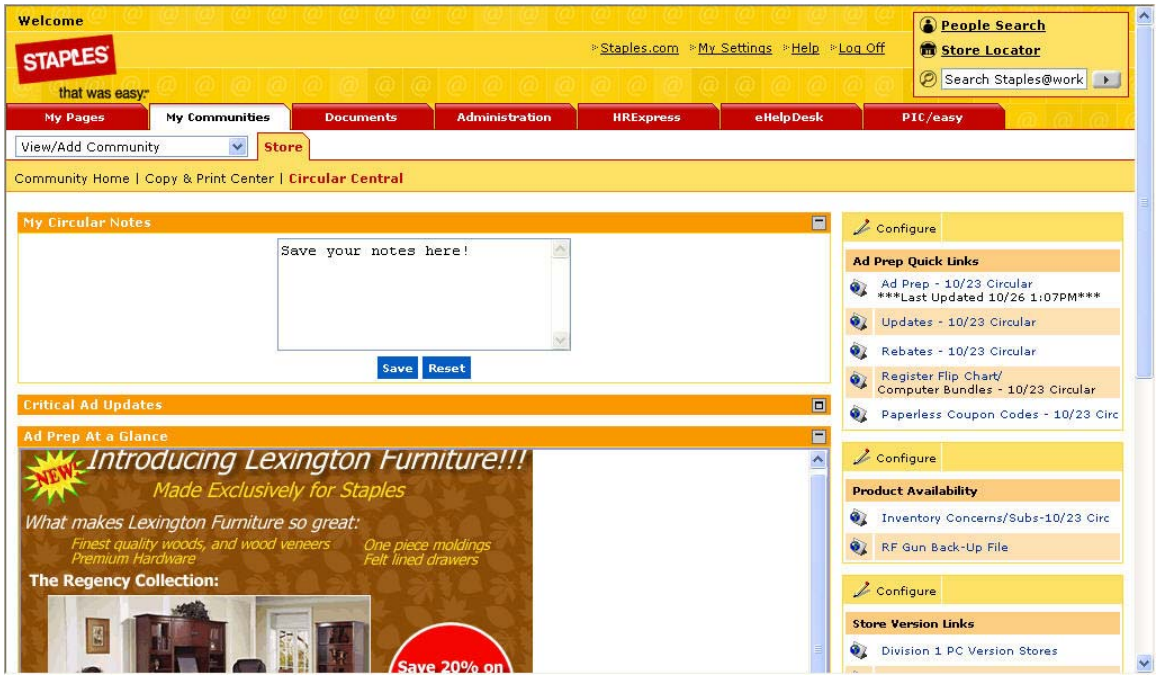
*FYI: Bulletin Board*, located below the circulars information, serves a similar function, denoting important product and process updates for employees.

On the left side of the page, *Store Quick Links* helps employees quickly navigate to needed applications. The section covers such topics as safety information, how to plan for store promotions, and policies and procedures for the copy and print center.




Pictured: The homepage for US-based Staples employees.

*Circular Central* also keeps employees in the loop on upcoming store sales. "In addition to detailed instructions on the printing and placement of signage, updates on inventory availability, and information about coupons and rebates, the page offers a 'notepad' that managers in one store—from varying shifts—can use to keep one another informed on the progress made in preparing for the advertised sales offers," says George Levesque, a portal strategy project manager.

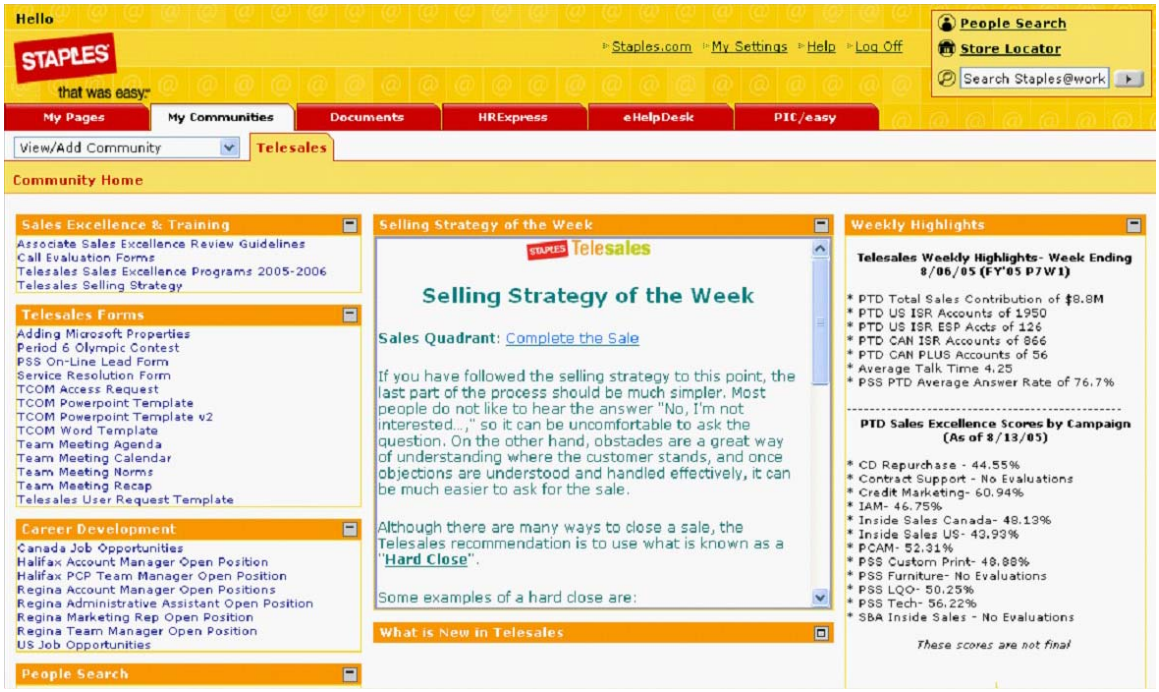



Pictured: *Circular Central* keeps store employees abreast of upcoming sales so they can better help customers. The page also lets managers from different shifts in the same store share their efforts and progress in preparation for upcoming sales.

Staples also offers an array of community pages. For example, while the name "Staples" likely conjures an image of brick-and-mortar stores, its telephone sales (telesales) are also an important business channel. So, the telesales community gets its own homepage. Each week the *Selling Strategy of the Week* appears, offering telesales employees concise advice on how to better complete a sale.

*Weekly Highlights* appears on the right side of the community homepage. Here, the sales team can track their sales for the previous week and gauge which campaigns are performing the best. While seeing this kind of information is an excellent reference, it's also an excellent motivator for individuals and teams to sell more.

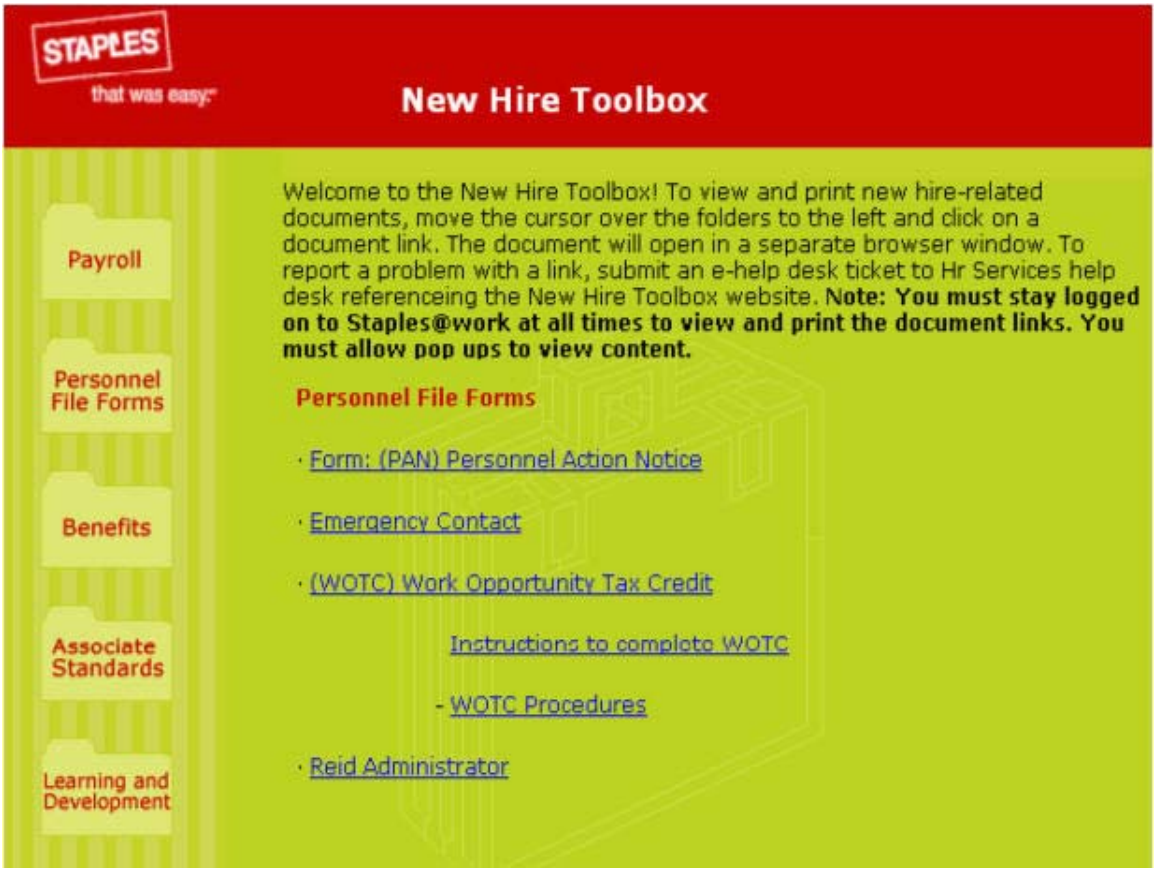
The left side of the page offers the sales force further tools to meet their needs. For example, *Training Information* covers guidelines, strategies, and programs; *Forms* includes a lengthy list of process-oriented, telesales-specific forms; and *Career Development* relays telesales-related job opportunities.




Pictured: The *Telesales* community page helps keep the phone sales team up-to-date on the latest product-selling strategies, information, and sales results.

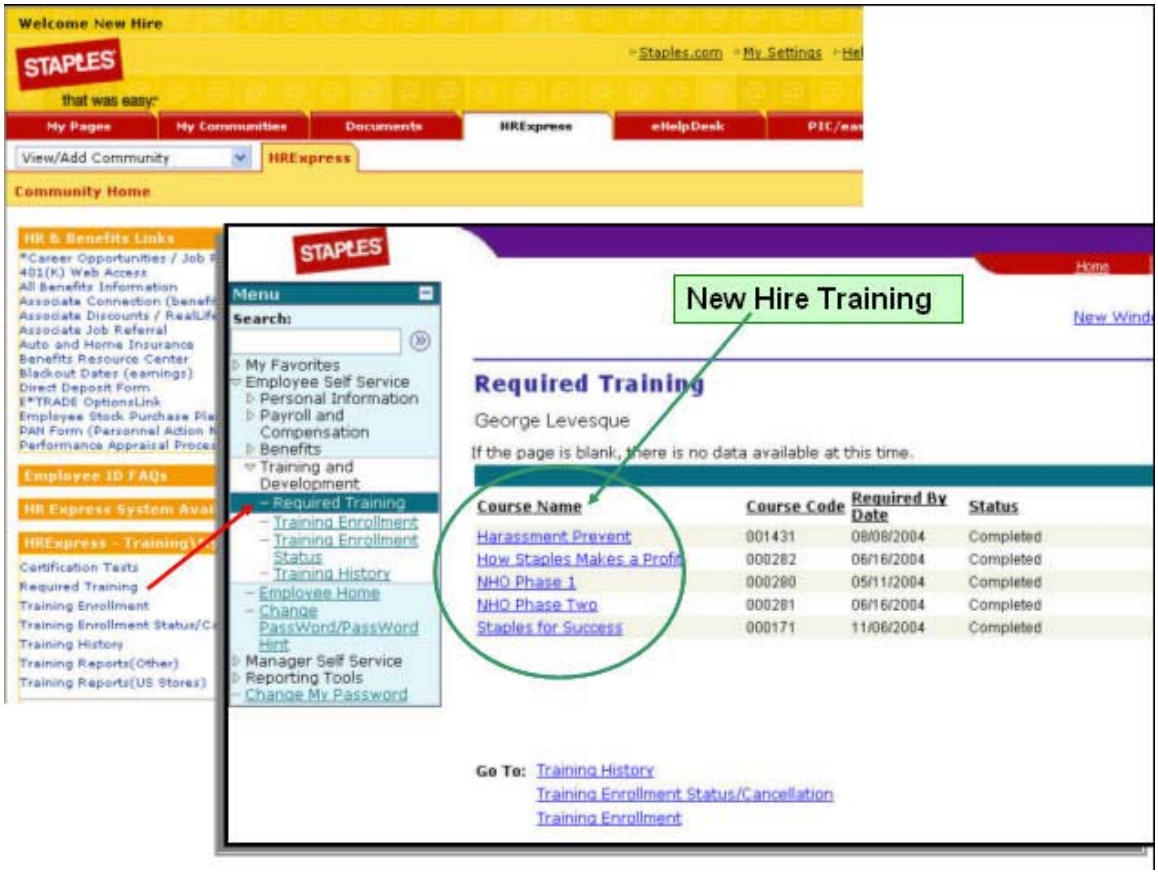
## New Hires

The *New Hire Toolbox* consolidates all of the steps and forms new employees need. The links and folders are straightforward and uncluttered, and users can print any document or form. This helps reinforce a sense of security for people who have recently joined the organization.



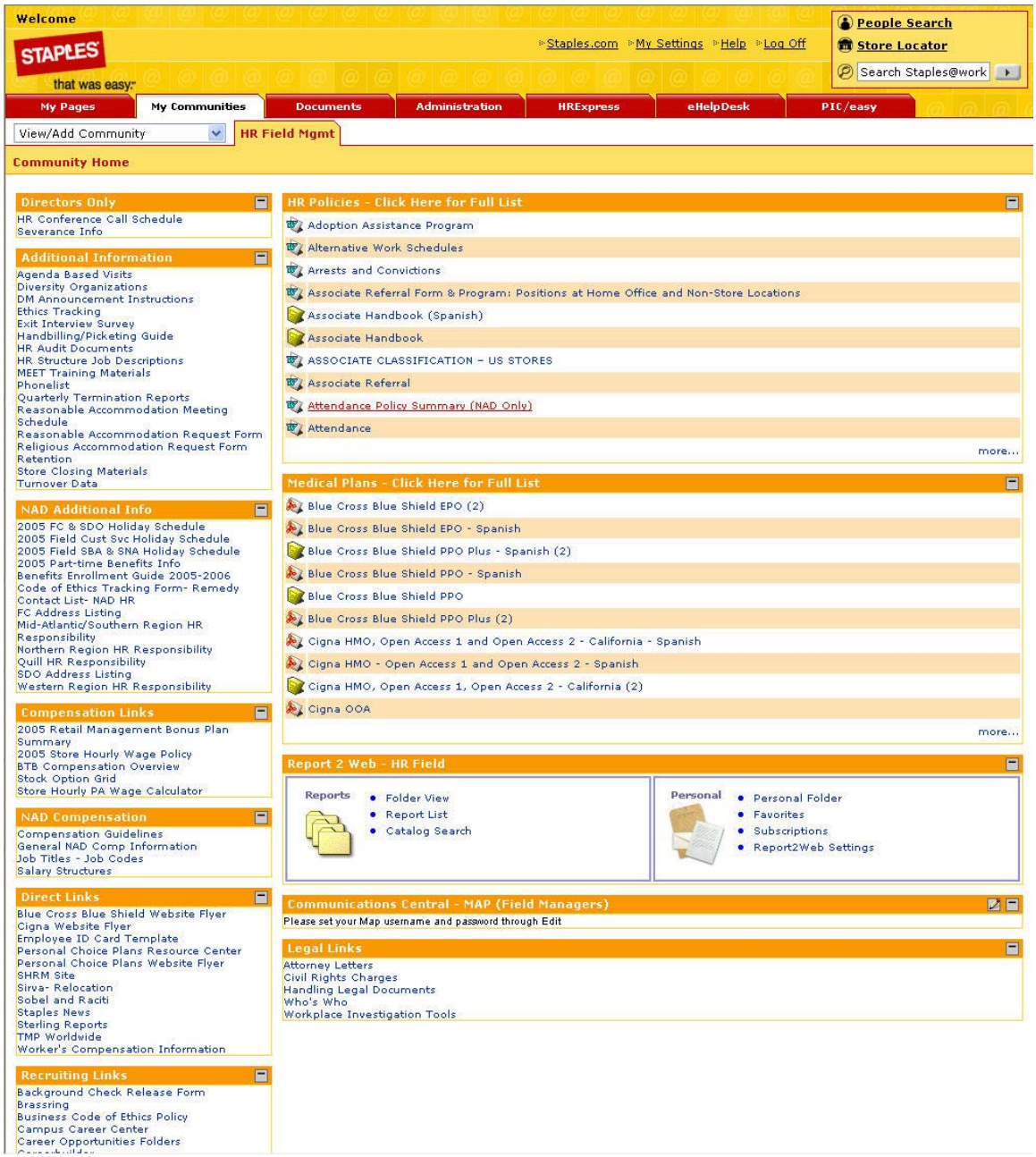

Pictured: The *New Hire Toolbox* consolidates all of the steps new employees need to take and the forms they need to print out and submit.

Another useful feature is the intranet's training section, which lets new employees browse available classes. More importantly, this section actually details which classes are mandatory and includes the deadlines for meeting those training requirements. Users can also easily see which courses they've already completed.




Pictured: The intranet's training section offers employees a list of available classes, details mandatory enrollments and related deadlines, and provides a list of completed courses.

Another community, *HR Field Mgmt*, gives HR managers easy access to all job-related policies, confidential information, forms, and support tools. In particular, guidelines and forms assist them with such employee-related tasks as hiring, terminating, promoting, training, and compensation. In addition, "as these individuals also wear the hat of trainer, this page gives them access to the materials needed to run in-person courses at remote locations," notes Levesque.




Pictured: HR managers have easy access to all policies, forms, and support tools necessary to hire, terminate, promote, and train employees, and to deal with compensation-related matters.

## Making Suggestions

When it comes to streamlining business operations, some of the best ideas come from people in the field. These employees often find innovative solutions to problems or identify small process improvements or tweaks that can increase productivity. Either way, it's useful to capture and share such knowledge.

To do this, Staples maintains a *Profit Improvement Culture* (PIC) page where employees can submit suggestions for how to improve processes, reduce costs, and

boost profits. While most organizations practice such knowledge transfer at least informally, Staples uses a more formal suggestion-box process, with noticeable results. "In 2003, we automated the PIC idea submission process through an online form on the intranet, and our submissions tripled," says Margaret Woisard, a portal strategy project manager. "The form also improved internal processes by building in workflow that directs each idea submission, based on certain criteria selected in the form, to the affected area of the company for review and consideration."

Today, the *PIC/easy Ideas* program continues to encourage employees to submit ideas for ways to cut costs or promote changes that, to quote the corporate tagline, help customers feel like "that was easy." To make a suggestion, an employee simply clicks the *easy* button on the *PIC/easy* page.

The form works: sales associates alone contribute about 70% of all suggestions Staples receives. Furthermore, Staples listens. Beyond making employees feel valued, such behavior is also good for the bottom line. Over the past five years, for example, Staples has implemented nearly 10% of the submitted ideas, and estimates that those ideas alone have saved $200 million. Another excellent aspect of the *PIC/easy* tool is that Staples calls out these facts right on the page, further promoting a culture of idea-sharing and reinforcing the importance Staples places on listening to its employees. Of course, it also entices people to continue to submit ideas.

Pictured: Users can click the *easy* button to make a suggestion. As text in the tool notes, "PIC/easy is a continuous improvement program focused on reducing costs, improving margin and supporting Staples' easy brand promise. It represents one of the key ways we turn associate's ideas into results."

The Staples intranet does an excellent job of serving its roughly 43,000 users. The portal replaced a variety of separate sites that had supported individual business units. Now, one interface serves not only the Home Office associates, but also the stores and general managers—and it serves them all well.

## URL AND ACCESS

Staples@work is the default homepage for all employees' Internet Explorer browsers. "By using a combination of the computer's IP address and the login credentials, we are then able to direct each associate to the start page appropriate to her or his business unit and location," says Levesque.

A limited number of power users can access the intranet via a VPN, though that will likely change soon. “Expanding the intranet for full extranet capabilities is one of the next major initiatives being considered,” he notes.

In Staples stores, employees can use back-office and point-of-sale machines to access the intranet, and also use customer-help kiosks to browse a locked-down version of the intranet. According to Levesque, “this ‘locked down’ version eliminates the possibility of customers accessing confidential information, and associates tying up these machines with anything not related to assisting a customer.”

At some Staples distribution and fulfillment centers, employees also share PCs. Even so, “because these machines are in locations that are restricted to Staples associates, full access to all pertinent intranet content and functionality is made available,” he says.

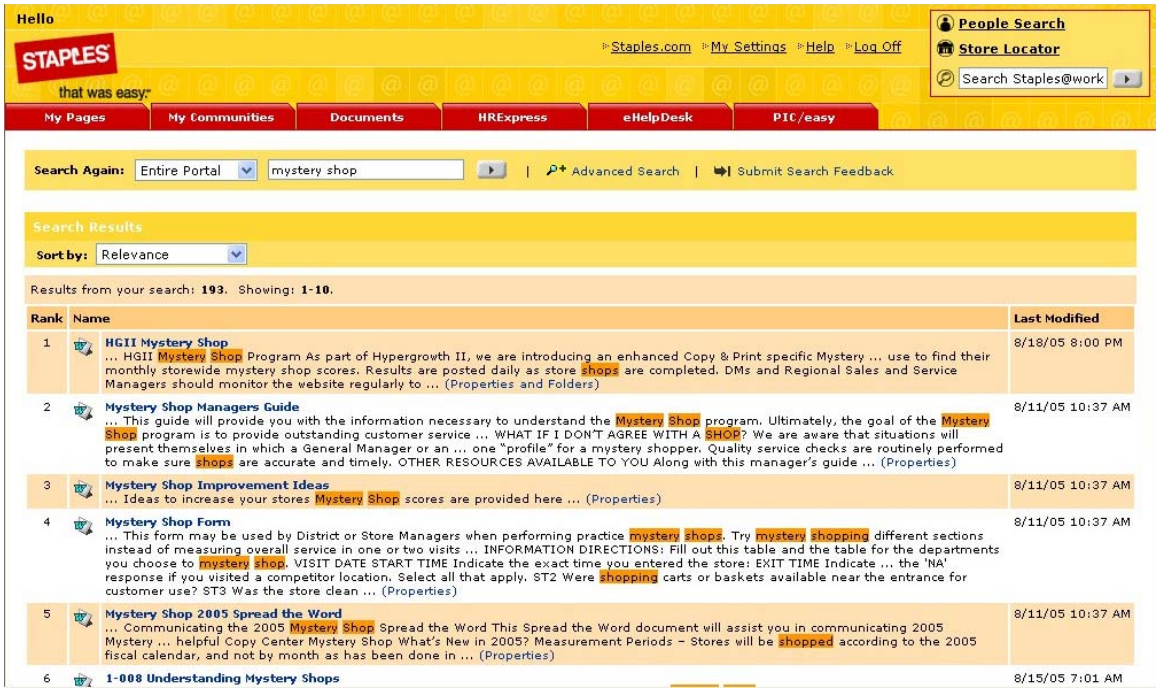
## CONTENT MANAGEMENT

Content management for Staples@work is handled by Plumtree (now BEA). Today, there are nearly 20,000 documents, all organized by folder structure. Initially, end users place documents in shared, file-server folders, and documents are then filtered by folder. Before they’re added to the CMS, however, content owners must first approve them.

Plumtree is also used to maintain the CMS taxonomy, which was designed—and is still maintained—by the Staples@work team, together with business owners from various company groups. “The taxonomy is managed administratively through the Plumtree UI,” notes Curran Leahy, a business consultant. “It is a living, breathing creature, as folders are added, modified, or deleted on a nearly daily basis.”

Content is filtered to employees based on their security credentials. “Security has been set so that content and folders are secured to only those associates who will find the information relevant,” says Leahy. “This allows the administrator to manage one taxonomy while presenting different views to any group of associates.” As a result, the Staples@work taxonomy differs for stores and for headquarters.

Similarly, search results may differ, with a search in a store for a store employee returning different results than a search carried out by a Home Office employee. As Leahy notes, “securing Staples@work in this manner makes the experience easier for the user, ensures content reaches its intended audience, and allows confidential data to be communicated through the portal.”




Pictured: Search results from Staples@work. Results can differ depending on a user's access credentials, and whether they're using the Home Office portal or a store-based, locked-down portal version.

The Plumtree software also lets project members upload and share documents to a project-member-only space, including version control and document check-in and checkout.

Today, about 150 employees based in the US, Britain, Germany, and Canada maintain the 20,000 documents that exist on Staples@work. "Content contributors are generally content experts in their area of employment," says Leahy. "For example, content related to store signage is provided and managed by those associates who are most familiar with sign content. This structure ensures greater content accuracy and promotes a sense of ownership that extends far beyond the core Staples@work team."

Staples settled on this content management strategy as a way to organize the portal's staggering amount of content. "It is not feasible for an individual or small group to manage 20,000 documents," says Leahy. Furthermore, such an approach "allows faster growth and faster response to end-user requests" and keeps different businesses groups involved and invested in the portal.

Still, the approach took some honing. "When Staples@work was first deployed, there was significantly less decentralization," says Leahy. "Rapid growth necessitated a change, but the software did not yet permit decentralization in a clean way. As the software was improved, we were able to review and update the methodology to that used today."

For content presentation, templates are scarce, she says. "There are templates for more advanced functionality, such as page, community, and portlet creation," but otherwise, few document templates are used. Instead, Staples relies on design guidelines and standards:

| STAPLES: CONTENT GUIDELINES AND STANDARDS | |
|---|---|
| **Document Formatting:** | Align text to the left. Avoid justifying and centering your text except on title pages or as necessary |
| | Limit regular document sizes to 2 MB |
| | Always spell check and proofread your file before placing it on your file share, to eliminate the onscreen correction underlining |
| | Don't create local hypertext links in documents. (Local means placing links within your own documents that link to other documents on the Staples@work share directory.) These cause problems and result in broken links if those documents are updated or removed |
| | Bookmarks within a document are acceptable |
| | Avoid posting Excel documents with macros unless absolutely necessary |
| **Typefaces, Fonts, and Backgrounds:** | Limit headlines' type size to a maximum of 18–20 points |
| | Limit typefaces to two different typefaces on a page |
| | Use standard online typefaces such as Verdana, Tahoma, and Arial. Many uncommon and decorative typefaces are difficult to read |
| | Avoid using ALL CAPITALS—for emphasis, opt for bold or larger type |
| | Avoid using italics, which is difficult to read on monitors. |
| | Remember black text on a white background is easiest to read |
| | Don't use light-colored type over a dark background; also keep this in mind with PowerPoint presentations |
| | Use colors sparingly, and only in headlines and section headings |
| **Graphics:** | Always use Staples logos according to their accompanying guidelines |
| | Limit graphics. Use them only when relevant to your document's purpose or theme |
| | Only use .JPG or .GIF graphic formats, and limit total file size to less than 2 MB |
| | Don't use copyrighted graphics from other sources |
| | Limit colors to the 216-color palette of "browser-safe" colors, which are a Web standard, and compatible with most monitors |
| **File Properties:** | Staples@work uses Document/File Properties to create the portal link, document description, and search server keyword index. Therefore, document properties are essential for helping people find content on the intranet. Filters are set on all portal folders to reject documents that have incomplete properties information |
| **File Size:** | Due to network limitations at our store locations, document size is limited to 2MB. The portal team works with content providers to reduce file sizes by converting some documents to PDF format, cutting larger documents into more manageable pieces, and eliminating background templates or unnecessary images. Exceptions to the file size rule are made where necessary or when the document is intended for a limited audience with access to sufficient bandwidth |

To ensure content contributors understand intranet-content guidelines, every contributor must first attend a portal training session, where the guidelines are emphasized. Guideline enforcement can also be automated in Plumtree, and the intranet team can easily generate reports of content that doesn't meet guidelines. Even so, "our challenges are more in the areas of keeping the content current and relevant than in how it is presented," notes Levesque.

Plumtree's Studio portlets also provide form- and survey-creation tools. One useful result of this approach is that non-technical employees can create "robust forms and surveys without touching code," notes Elyssa Ramirez, a portal IS team member.

## TECHNOLOGY

The CMS is Plumtree 5.0x Enterprise Portal, including its associated applications: Collaboration Server, Content Server, and Studio Server, and Plumtree also handles intranet searching. The portal team uses Microsoft Visual SourceSafe to manage the changes it makes to Plumtree.

The intranet runs on Intel-based hardware with the Windows 2000 SP4 operating system. Where required, Staples also runs Apache Web server, IBM WebSphere 5.1.0.3, and Microsoft .NET 1.1.

For bug tracking, the team uses UltraApps Issue Manager, and for quality assurance, SilkTest from Segue Software.

## GOALS AND CONSTRAINTS

Goals:

- Ensure Staples@work is a primary source for all corporate communications and information
- Give employees access to business applications and interactive tools, such as the corporate phone book, conference room scheduler, internal publications, and a document library covering all Staples departments
- Take better advantage of Plumtree functionality, such as Web Services, user profiles, and studio and collaboration portlets, to increase portal applications' capabilities and efficiency
- Expand the use of community pages beyond major business units to smaller work groups and project teams
- Enhance the working relationships of project teams using collaborative tools, such as discussion boards, workflow management tools, and task calendars
- Improve search capabilities, especially to make it easier to locate frequently used HR information
- Offer more employees use of personalized *My Pages*
- Facilitate users' ease of navigation between group, department, and project pages

Constraints:

- Limited access to the intranet for mobile users (through a VPN only)
- Budget and time, and problems selecting an appropriate CMS platform
- A limit on Plumtree customizations (to facilitate easier upgrades)
- Inflexible blackout periods—including holidays and the back-to-school period—restrict when major releases can go live

## BASIC INTRANET FEATURES

Staples@work offers many features that make it easier for employees to do their jobs, while also supporting feedback mechanisms to continuously improve those processes.

For example, the *Management Action Planner* gives store managers a variety of needed tools and information. Meanwhile, using the *PIC/easy* tool, any employee can suggest changes meant to better help customers or facilitate improved employee productivity.

More than thirty-five business-focused communities also deliver needed tools to employees.

Meanwhile, the intranet also includes a variety of essential features. For finding employee information, for example, Staples@work users have *People Search*. Beyond returning such information as telephone numbers and email addresses, the popular tool lets employees update their own information. Search results also include an employee's supervisor—a contact point for helping solve problems quickly when the employee isn't available. Because *People Search* is so popular—and useful—users have multiple ways of accessing it. "We supply access by both a link in the header throughout the portal experience, as well as through a portlet window on the most commonly used community pages," says portal strategy project manager Margaret Woisard.

Pictured: Results of a *People Search* include not only basic employee information, but also a link to the employee's supervisor. This facilitates more rapid problem solving if the employee is unavailable.

Personalized *My Pages* let most employees customize a variety of pages related to work and personal interests, with features ranging from self-maintained lists of important portal links to weather and local movie times.

Another interesting feature is a store locator tool, which allows employees to quickly find store information by city and state, zip code, or store number. This tool has also

found uses beyond what the designers might have originally envisioned. For example, "the store number look-up is especially useful to accounting when they are trying to research issues on accounts payable or receivable," notes Woisard.

Another popular tool is the *Internal Communications* portlet, which offers breaking news about the business and the employee's location. Behind the scenes, security restrictions control the information that is presented to different employees. Corporate communications can also use a promotional feature, "a graphical way to grab the viewers' attention for important messages about quarterly profits, social issues, upcoming events, and so on," says Woisard. For example, one recent feature highlighted a company initiative called "Staples Soul," which is "the company's commitment to diversity, ethical business practices, the environment, and community relations."

Pictured: The *Internal Communications* portlet, which delivers personalized, breaking news about Staples, as well as the employee's business location.

## USERS

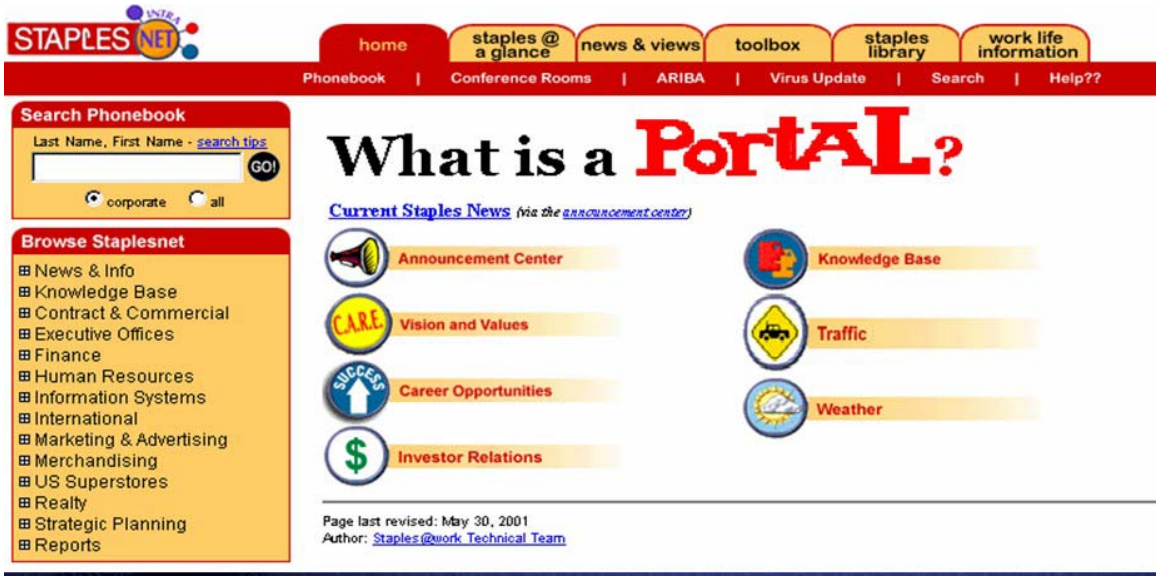
Staples@work is accessible by about 43,000 Staples employees in the US corporate offices and stores, and in offices and stores in Britain, Germany, the Netherlands, and Belgium.

## USER TASKS

- Find employee information
- Read breaking news about Staples, as well as particular Staples business locations
- Use one of more than thirty-five business-focused communities to access business- and role-related tools
- Reference HR and facility-related information
- Use the *PIC/easy* tool to submit an idea for improving a process or maximizing profits
- Use portal-based training tools (especially for new employees)
- For managers: use the *Management Action Planner* tool to track important managerial information and help manage the myriad tasks related to managing a store.
- Access essential business metrics (such as inventory and budgets) using the *Report2Web* tool
- Locate stores and store information

## BACKGROUND

In the 1990s, various intranets grew organically within Staples and served different audiences. Collectively known as Staplesnet, they often sported different designs and navigation.




Pictured: A homepage from one of the original Staples intranets, circa 1999.

In February 2000, Staples began rolling out its first enterprise-wide portal, Staples@work, which was based on Plumtree software. This provided a single portal interface for everyone: managers and employees, and people located both in corporate headquarters and at stores and support sites. The new portal also included new tools, such as a conference room scheduling application.

Pictured: In 2000, Staples introduced its first enterprise portal, Staples@work. While the intranet team continued to add features, this design basically held until 2002.

The move to a portal necessitated additional staff. "When Staples@work first rolled out in 2000, there were two project managers in the HR group who oversaw all content and administration," notes Lindsay Germanos, a portal strategy project manager. "They worked closely with three IS team members. Within a year, however, the team needed to expand to support company initiatives and a growing need for content on the portal. A decision was made to split content and administration functions, so two new roles were developed and added in the global resource and technology department to manage administration functions. At this time, the IS team also added new members to the team."

In July 2002, Staples launched a major redesign of Staples@work and began rolling out the portal to additional business units and international sites. The portal team also began actively governing the intranet at this time, as well as collecting portal-related metrics.

In 2004, Staples purchased an upgraded version of the portal software. This upgrade included improved features, such as the ability to use newer coding languages and additional portal tools that offer employees improved services and applications. (The "Design Process" section above offers more details on this upgrade and redesign.)

Pictured: The second major redesign of Staples@work launched in 2002 and expanded the intranet to other sites and overseas business units. This design basically held until 2004.

Today, the Staples intranet team includes sixteen people, including managers drawn from three different areas of the business: the portal strategy team, the global resource and technologies team, and the HR and intranet systems group. "Due to a few job shares and some individuals' job responsibilities outside the portal, only about ten full-time equivalents of these people's time are devoted solely to the intranet," says Levesque.

The HR and learning technologies and communications department owns the intranet. The portal strategy team, inside that department, includes six people who are responsible for content, site usability, metrics, and content-provider and end-user portal training. In the same department, the four-person global resource and technologies team oversees the administrative functions of Staples@work. The HR and intranet systems group—comprised of six people in the IS department—handles portal, ASP application, and portal architecture development and support.

In 2005, the team added two new portal-devoted employees (from the HR department) and began to cross-train additional personnel on portal procedures and technologies.

## DESIGN PROCESS AND USABILITY ACTIVITIES

Staples heavily emphasizes user-oriented design. "The Staples@work team has always looked to usability findings as a major driver for design and interface improvements," says Levesque. "The project managers in the portal strategy team all have a deep interest and varying levels of experience in website usability. This core competency, and a requirement that any new portal presence or change include

guidance from the portal strategy team, ensures that all development follows a user-centered design approach."

With this approach, Staples continued to redesign its intranet. Yet, by 2004, it had been several years since the intranet had undergone a major redesign. The intranet team began preparing for a major upgrade.

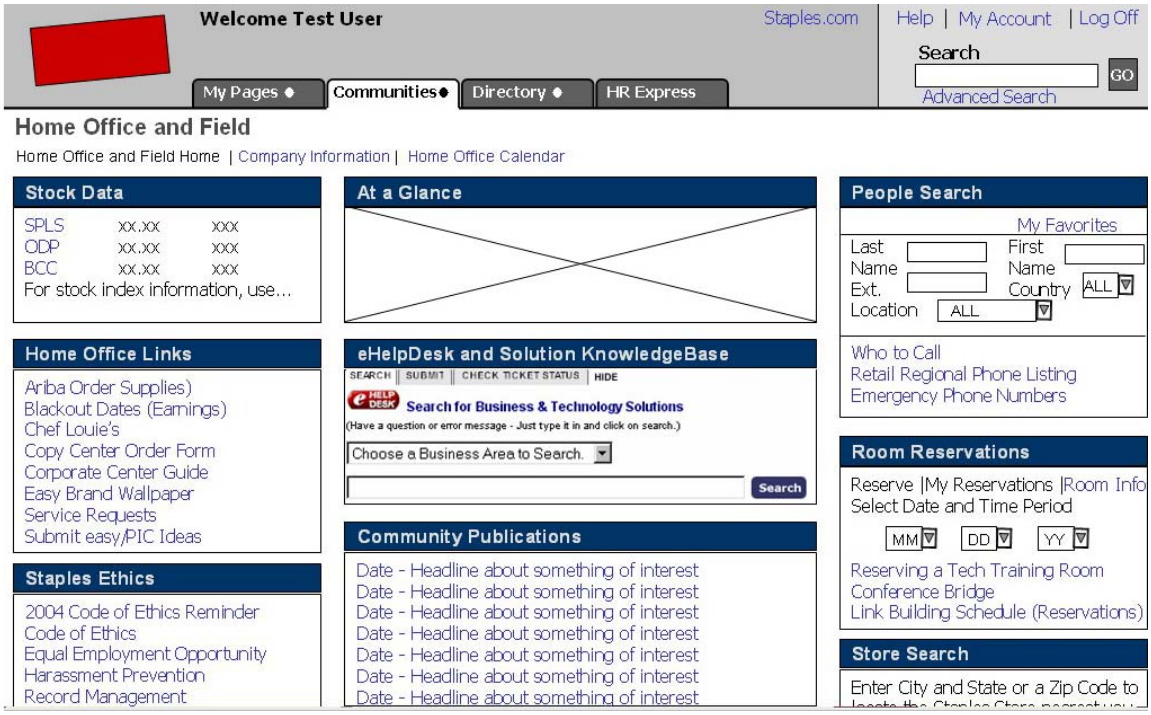
First, it collected user feedback. "Most previous changes had resulted from information supplied by various sources including associate surveys, user feedback, support center data, and issue escalations," says Levesque.

To develop a portal redesign plan, the portal team set milestones, including many based on usability activities. For example, "the first two activities included the development of personas and a massive associate survey, followed by interviews with a broad sample of respondents," he says.

Key findings from this research helped immediately focus the redesign and what would constitute project success. According to Levesque, the research revealed the following top problems: "difficulty and frustration in using search, an inability to locate important human resource information, limited access to the personalized page functionality, and a lack of awareness of the availability of portal pages other than the individual's start page and the HR page."

Next, the redesign team enlisted the Staples human-factors team to conduct a heuristic site evaluation. "The human factors group, while primarily focused on the retail website and business applications, is and continues to be available to the portal team for consultation and guidance," says Levesque.

To develop a wireframe of the proposed new homepage—a start page for all Staples employees—the portal team combined findings from the heuristic analysis and the user surveys and interviews. However, designers quickly determined that one size might not fit all, says Levesque. "While many of the recommendations from this wireframe were incorporated in the final start pages for the five business units, it was determined that a universal start page would hinder some key business functions."

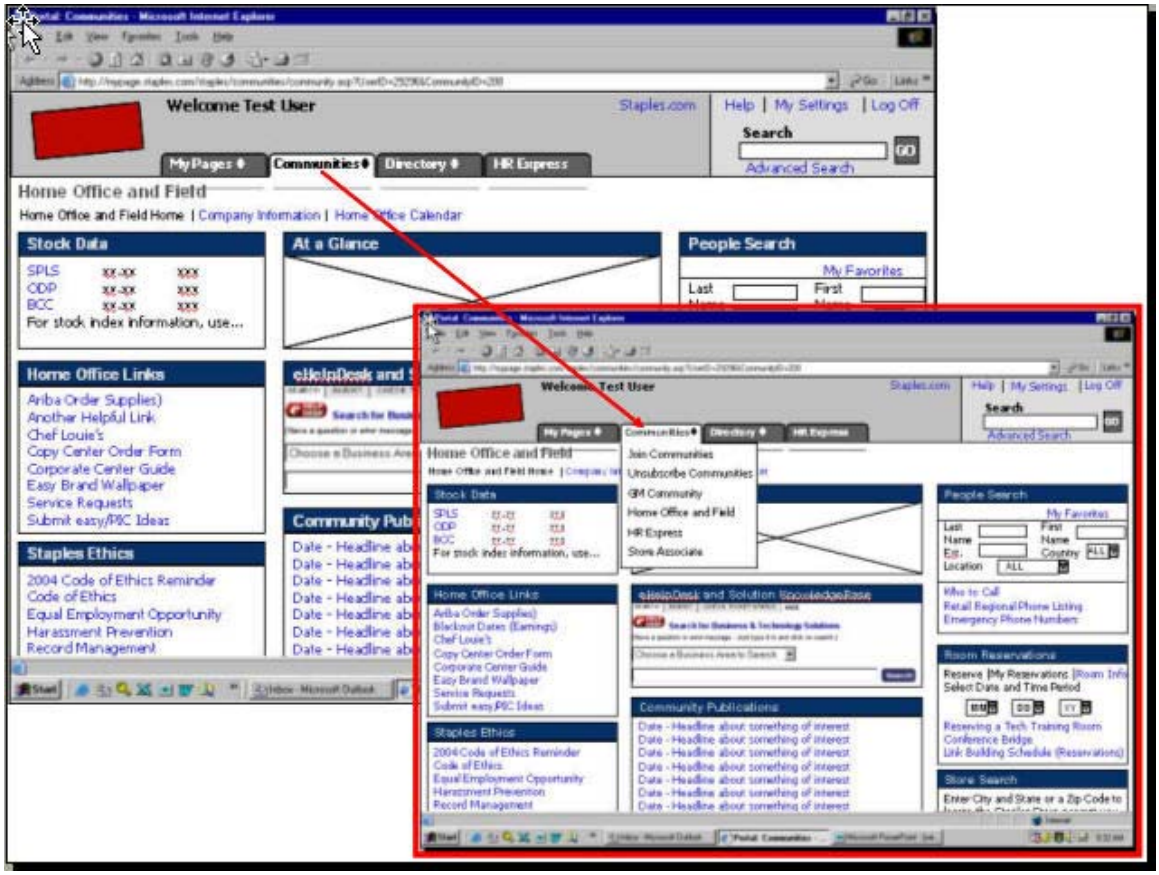



Pictured: The redesign team created several interactive PowerPoint presentations for prototyping the site. This was the initial one.

The team regrouped and opted to see which navigation designs the Plumtree 5.0 software could easily offer out of the box. Yet "like most off-the-shelf products," says Levesque, the software's approach didn't mesh exactly with how Staples had approached—or wanted to approach—navigation. Implementing it would also have meant a radical change for users.

So, the team set about modifying the available navigation schemes. "We decided it was best to devote the additional time and resources to customize the navigation. We took the best of our old design, thereby offering some familiarity to the end user, yet incorporated more current insights from the likes of Jared Spool, Jakob Nielsen, and the personal usability experiences and training of our team," he says.

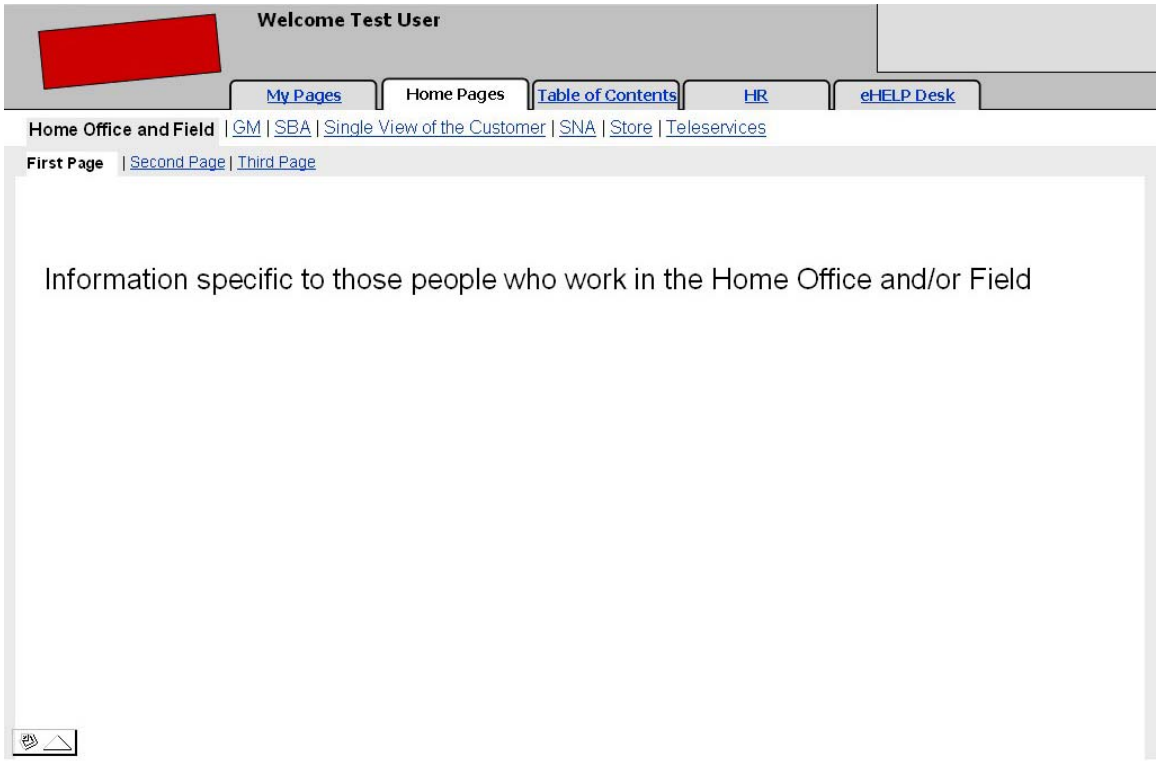
To design the new navigation, a cross-functional team formed with members of the human factors, portal strategy, HR technology, and IS groups. The portal strategy team then developed wireframes, and tested them with a diverse group of twelve employees, focusing especially on header links and search functionality. "We were especially concerned about some of the out-of-the-box search functionality," notes Levesque.




Pictured: The initial wireframe design Staples tested with twelve diverse employees, focusing especially on header links and search functionality.

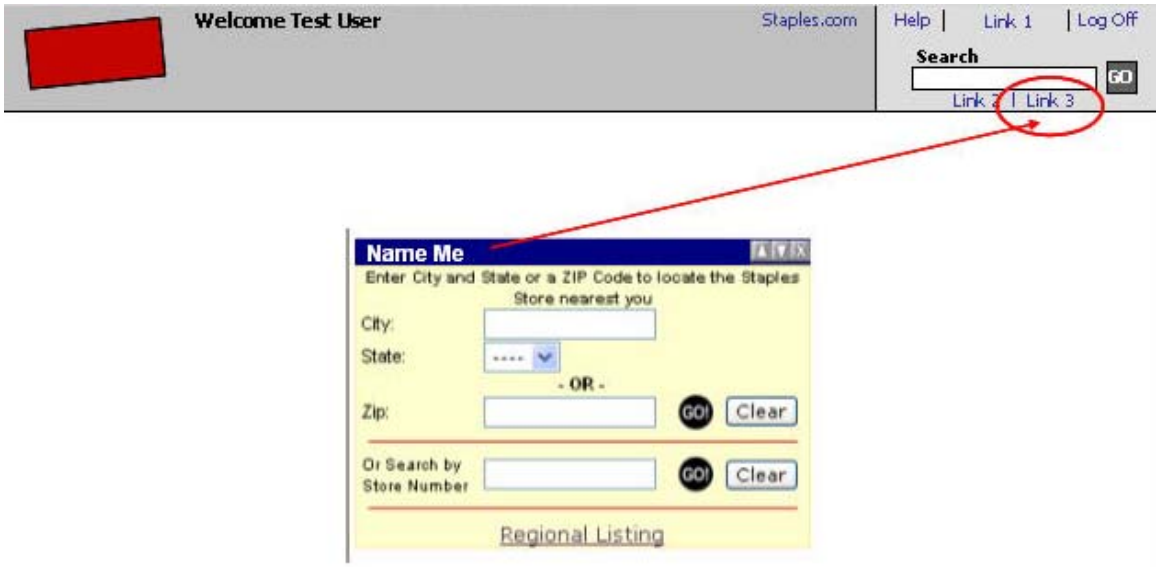
This first round of usability testing produced notable results and confirmed some designers' suspicions. For starters, users had difficulty using a "saved search" feature. "Eventually, we decided not to include this new option in the redesign since the resources required to solve all the inherent usability issues would have jeopardized our deadline," says Levesque.

The initial navigation scheme, which required a mouse click on a tab to expand a drop-down list, was also unsuccessful. "While test users had no difficulty using this method when navigating to a different tab, they saw no clue to lead them to click on the current tab to navigate to other pages within the same area of the portal," he says.




Pictured: The first wireframe the intranet team created to redesign the intranet's navigation.

Designers also discovered that users didn't understand some of the portal's terminology, even though the terms had been used on the portal for years. So, the designers immediately added nomenclature testing to the redesign project.

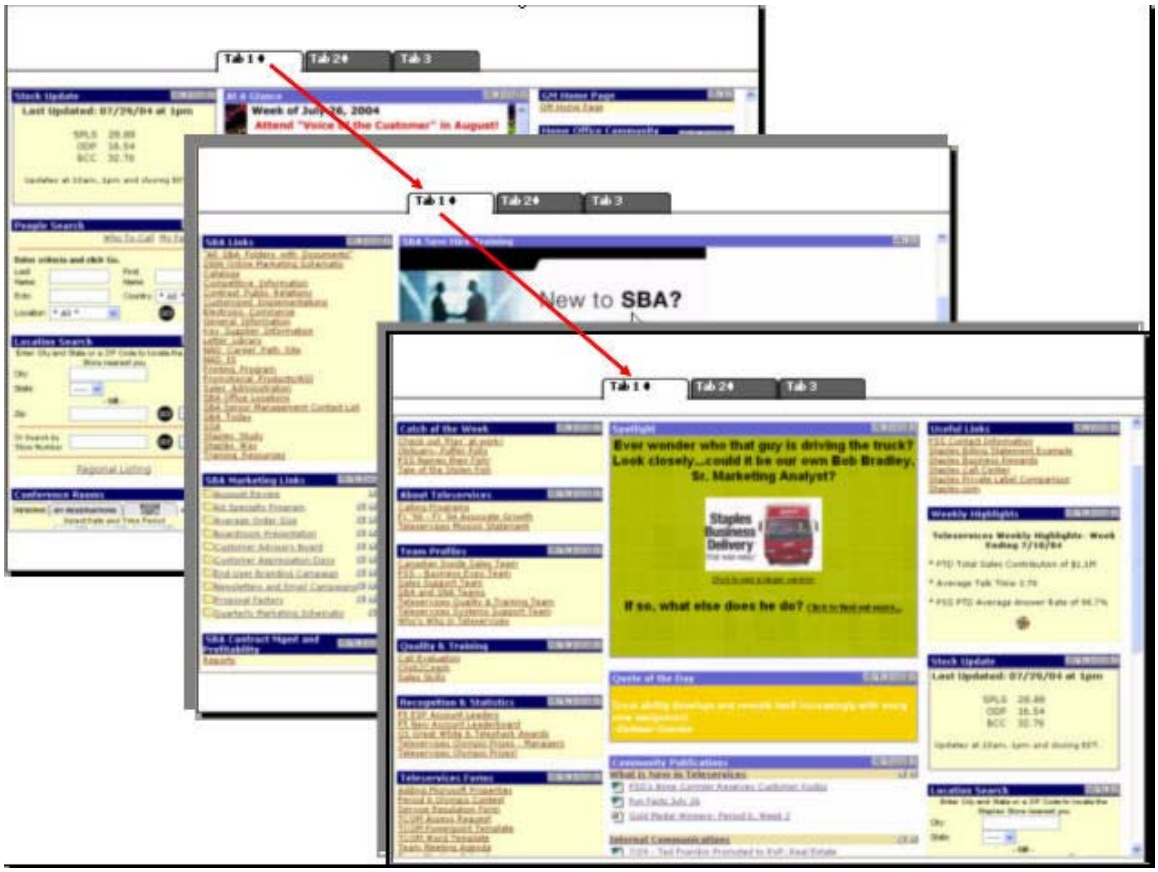



Pictured: A wireframe Staples used to help test portal nomenclature. Initial tests revealed many users were unfamiliar with terms long used on the portal.

The nomenclature testing highlighted various problems users had; some were easier to solve than others.

For example, "one of the biggest struggles for users was the term 'communities' in the Plumtree environment," notes Levesque. Yet, a major redesign goal was to expand employees' use of such pages—especially beyond their current business-group use—to help more small-scale project teams. The redesign team therefore had to solve the problem with the *Communities* label.

To help, the team launched another round of nomenclature testing, this time using several wireframes of community pages, each with three tabs in the top navigation bar. "The tabs were simply numbered, with all wireframes indicating Tab 1 as active," says Levesque. Usability testers asked users to not only identify which pages they would use as part of their jobs, but also to suggest names that would appropriately convey a page's function to other employees.

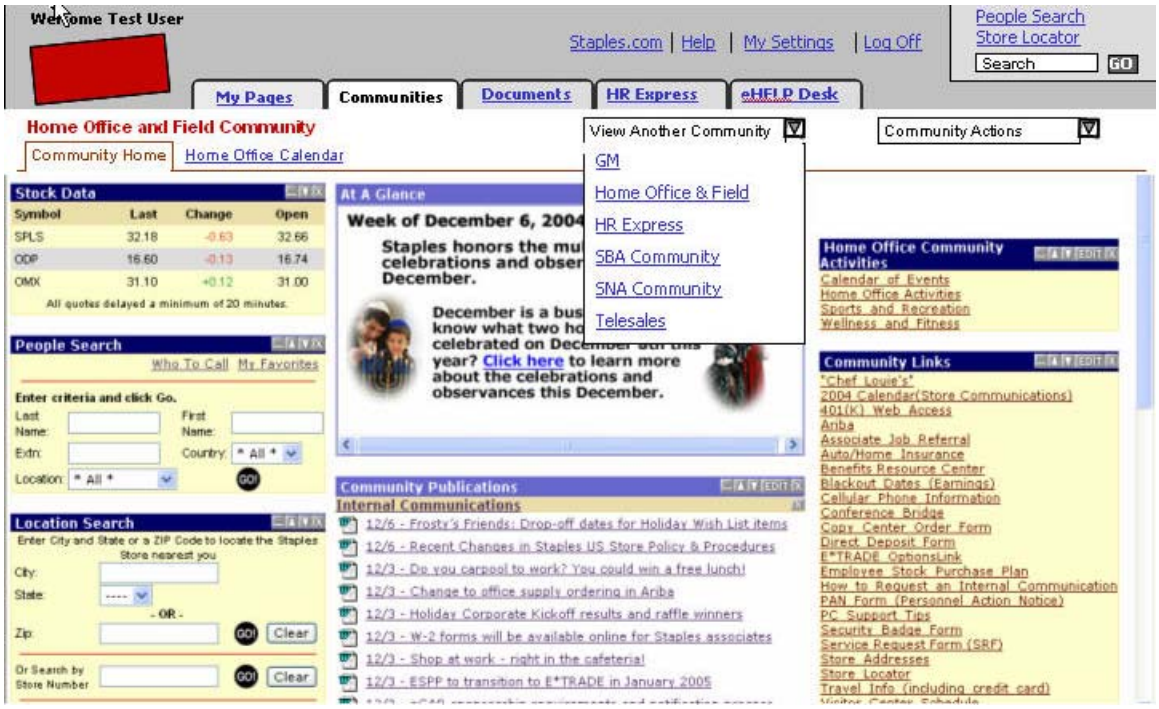



Pictured: Wireframe designs from a second round of nomenclature testing, which asked users to identify the business unit pages they would use in their jobs, and then to suggest appropriate names for them.

While users could identify the business unit pages they would need to use in their jobs, they generally had great difficulty finding a name that would appropriately convey a page's purpose to other users. "Most ended up saying 'communities,' simply because that is the term they have seen used on the portal for several years. A few proposed 'homepage' but felt that would not work where there are more than one homepages.' Others said 'start page' but, again, withdrew that idea when they realized there would be multiple pages under this tab," notes Levesque.

Ultimately, designers opted to change the *Communities* label to *Community Pages*. They thus retained "a familiar, if not fully understood, term," he says, and also conveyed that multiple pages lived in one tab.

With the above results in hand, the redesign team created a new prototype, eliminating the drop-down tab in favor of a drop-down located below the tab, to the right of page links. "In our previous test, we had combined, in one list, the links to other community pages with the actions users could take, such as joining another community," says Levesque. "In this round, we decided to separate these functions into two drop-downs, one labeled *View Another Community* and the other called *Community Actions*.'"




Pictured: The next redesign wireframe revisited the homepage, swapping drop-down tabs for drop-downs located below the tab, and to the right of page links. Designers eliminated the single link to community pages, adding drop-down links for *View Another Community* and *Community Actions*.

"Users had no idea what *Community Actions* might do and always went to *View Another Community*, even if the scenario told them to join another community that was not in their community drop-down list," notes Levesque. Results from this round of usability testing found that merging the two drop-down lists would work so long as there was a clear separation between the list of actions and the list of pages.

"Users also had some difficulty finding the drop-down lists, as they were placed to the far right of the page, beside the page links. Users were looking to the left instead—for navigational elements."

Also, during testing, "an interesting issue arose in the users' search for a way to navigate to another community page," he says. First, users looked for an appropriate navigational element on the left side of the page. Next, most opted to go to the *Community Links* portlet on the top of the page's right-hand column, even though it's only a list of frequently used links. Nevertheless, "many users who had seen this

heading for years on the portal now interpreted it to mean links to other communities."

In other words, designers needed to defuse the nomenclature problem. "As a result, we changed the heading of this portlet to *Frequently Used Links*,'" he says, since that better described what actually lived there.

Pictured: A wireframe used to test a nomenclature change: from *Community Links* to *Frequently Used Links*. Users mistook the former name—even though it had been used for several years—for a list of links to discrete communities. The new name more correctly describes what the portlet actually contains.

Another wrinkle: When building the final site, designers discovered it would be easier to build the drop-down list of *Community Pages and Actions* if it was part of the left-hand navigation. So, the designers conducted one more usability test with the changes, using a working version of the new site running on a development server.

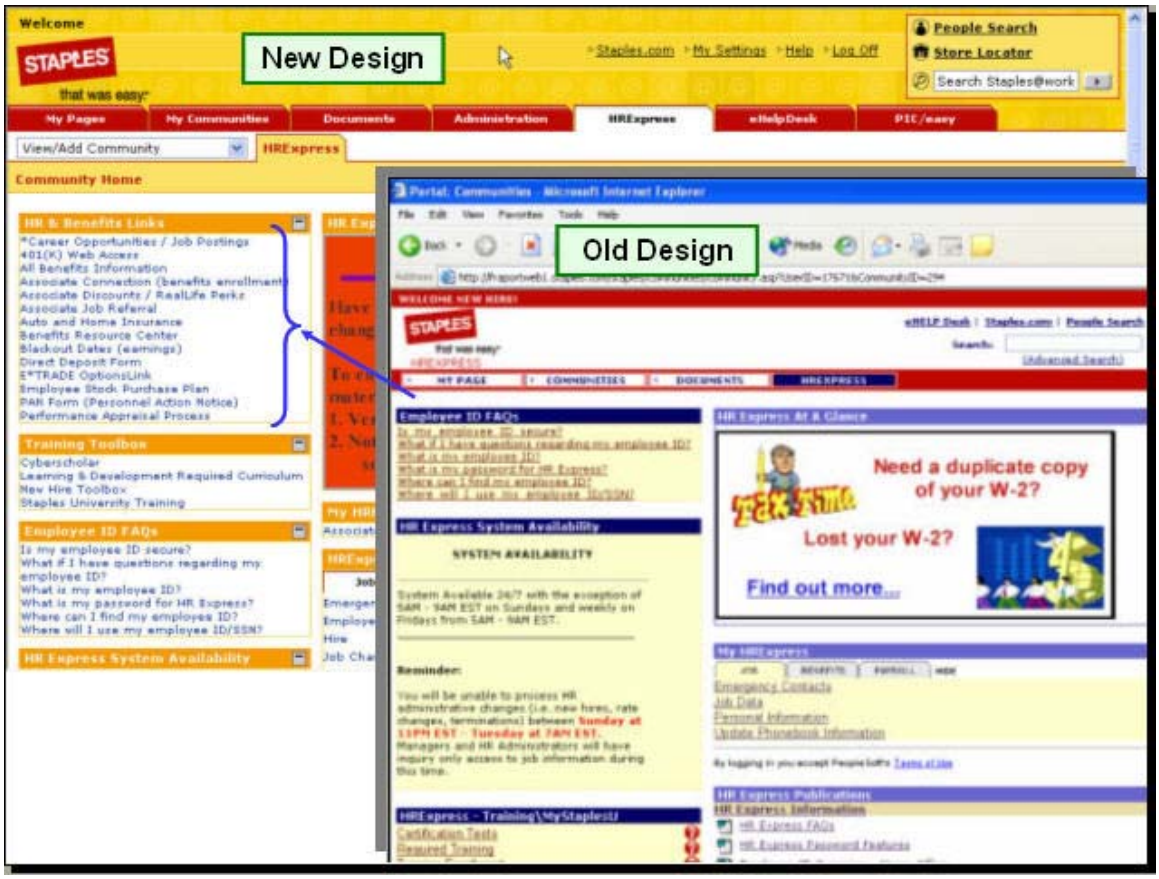
All redesign efforts were also encumbered by the need to weigh desired customizations against the maintenance time they'd require through successive Plumtree versions, notes Levesque. "While the Plumtree software is a great foundation to build our intranet on, it did force us to consider any interface modification very carefully so we were not overly burdened by reapplying customizations during future upgrades."

Throughout the entire redesign process, each usability test included a satisfaction questionnaire. In it, users reported finding the new site easier to use. "Only one of the test users felt the new design was neither better nor worse than the old, with all other respondents agreeing that the new design was 'markedly better,'" notes Levesque.

Another redesign goal had been to redesign the portal's HR section. Given time constraints, however, a full redesign wasn't possible. "Our redesign schedule, like

any change affecting our stores, was constrained by the retail 'blackout calendar' which restricts major releases from occurring during peak busy times like back-to-school and the holidays," says Levesque. "A delay in the development of our new design by only a few weeks would have resulted in our needing to postpone release for several months."

Even with such time constraints, "we wanted to do something to address the large number of complaints received about this area of the portal in the survey and interviews," he says. Designers therefore opted to streamline the presentation of HR information. First, they removed all links to HR information from the start page, housing them instead on an *HR Express* page. "These links were placed in a prominent portlet at the top-left corner of the page so they are the first thing a user sees when arriving on the page." Designers then added links to information users access most frequently.




Pictured: A wireframe Staples used to test HR information changes. Because the team lacked sufficient time to redesign the HR area, it instead removed all pieces of HR information from the homepage except for a link to a new *HR Express* section.

While most of the redesign involved software changes, the *HR Express* changes didn't, which meant the redesign team was also able to just launch them as soon as testing was complete. "We implemented it two months before the release of the new design," notes Levesque. "This way, associates were not overwhelmed with too many changes at one time."

## TIMELINE

- Through 1999: A variety of homegrown intranets established.
- 2000: Launched Staplesnet, the first centralized intranet.
- 2001: Completed full conversion to new intranet.
- Fall 2001: Deployed intranet to stores.
- July 2002: First major intranet upgrade.
- May 2003: Deployed intranet to UK locations.
- November 2003: Deployed intranet to Germany.
- August–December 2004: Intranet redesign planned; requirements detailed.
- December 2004–March 2005: Designed new intranet.
- March–May 2005: Developed new intranet technology.
- May 2005: New intranet thoroughly tested on development servers.
- June 2005: Launched redesigned intranet.

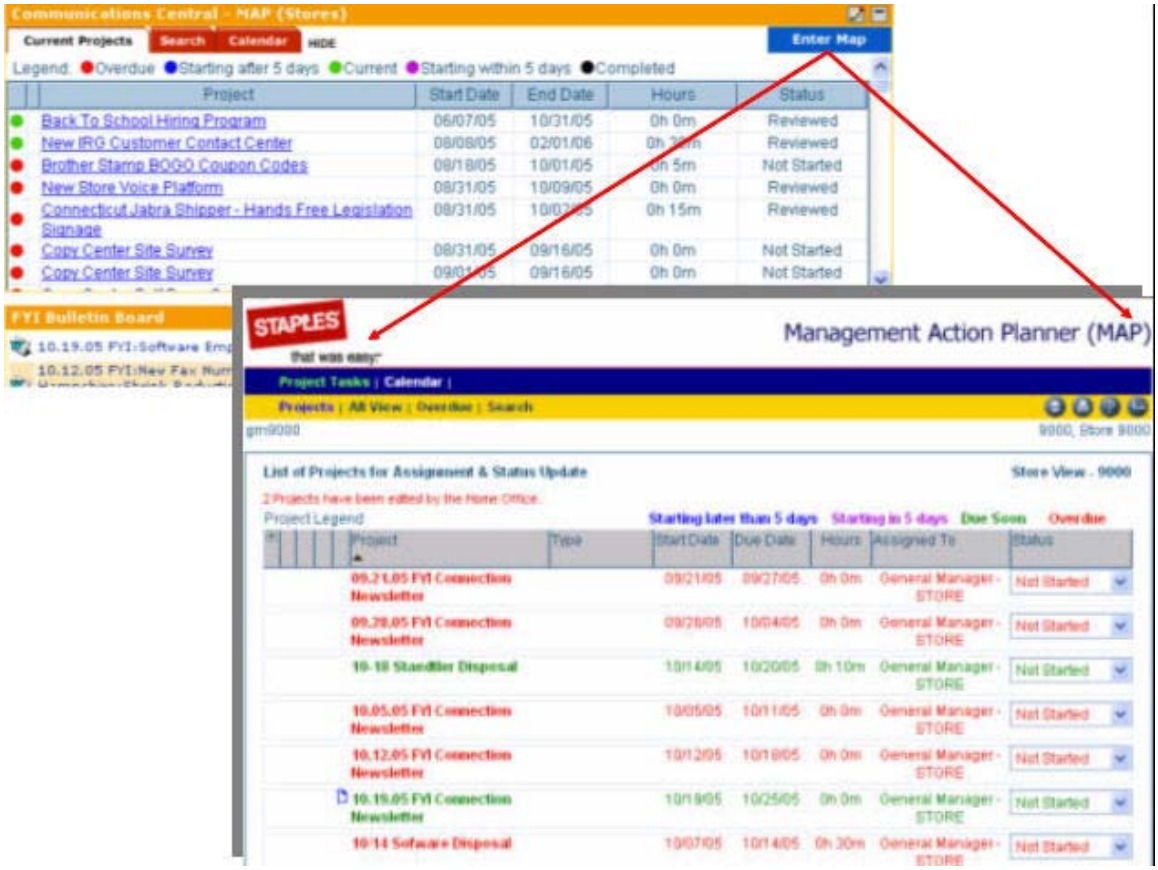
## RESULTS

On June 20, 2005, the redesigned Staples intranet, Staples@work version 5.0, went live for its approximately 43,000 users.

The redesign maintains core approaches, such as presenting each corporate intranet as a different sub-portal that delivers content and applications specific to country and business needs. In each sub-portal, specific groups of users also get targeted content and applications via community pages.

The redesign, however, introduces myriad new features, including a user-tested interface, enhanced communities, and improved search. The redesign also heralds the intranet's availability for the Quill business unit, which direct markets office supplies. Behind the scenes—and well hidden from users—upgraded Plumtree technology helps make this possible, facilitating many of the new features.

Overall, users now have easier access to tools that help them maximize their productivity. For example, the intranet's *Management Action Planner* (MAP) delivers important information directly to store managers. "In addition to simple notifications, this tool is a means of distributing documentation to the stores without burdening the email system, and includes a workload management tool that allows for the assignment and delegation of tasks, in addition to the ability to track task completion," says Woisard.

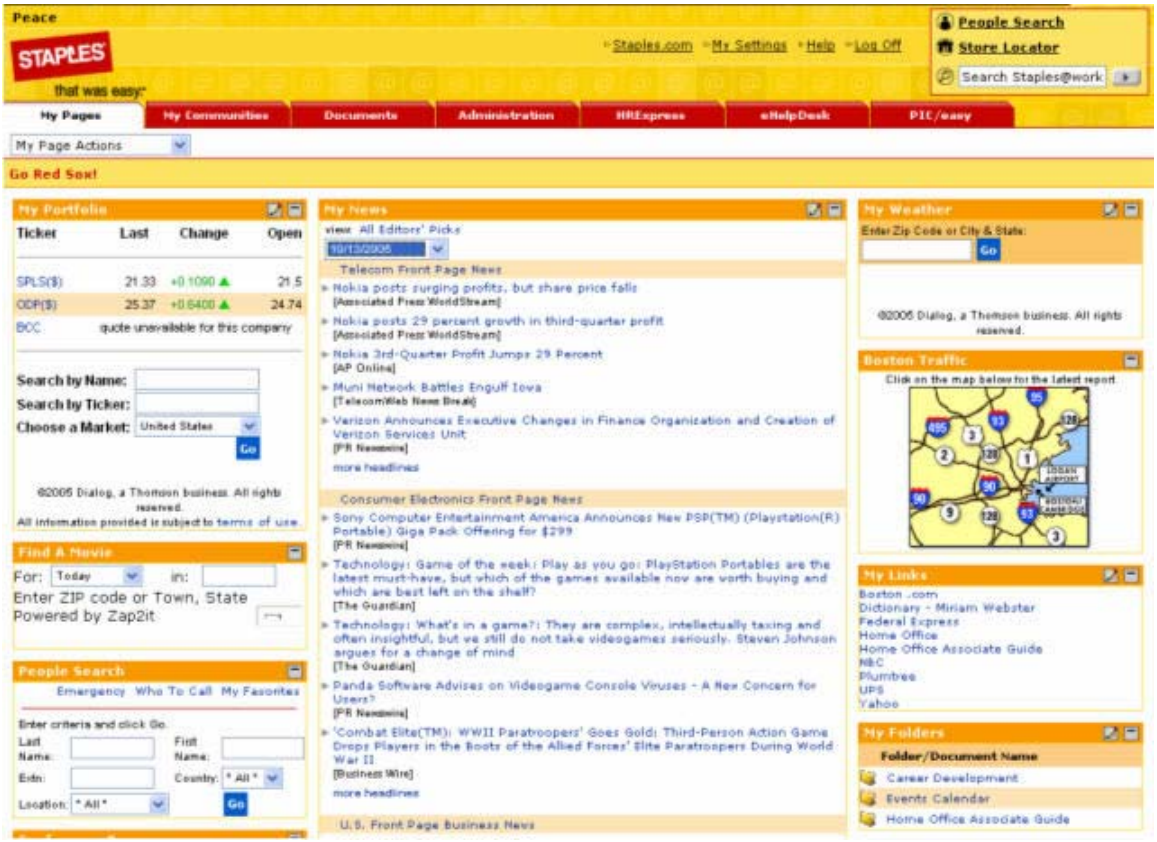



Pictured: The *Management Action Planner* provides relevant communications and tools directly to store managers. Many such communications previously flowed over email.

Meanwhile, managers also get access to needed metrics, including inventory reports, sales goals, and budgets, via the *Report2Web* tool. This replaced the two previous methods for sharing such information: printing and express-mailing reports, or emailing large Excel files. By contrast, "our *Report2Web* tool allows store managers to access these essential reports through the portal at greater speed and efficiency," says Levesque.

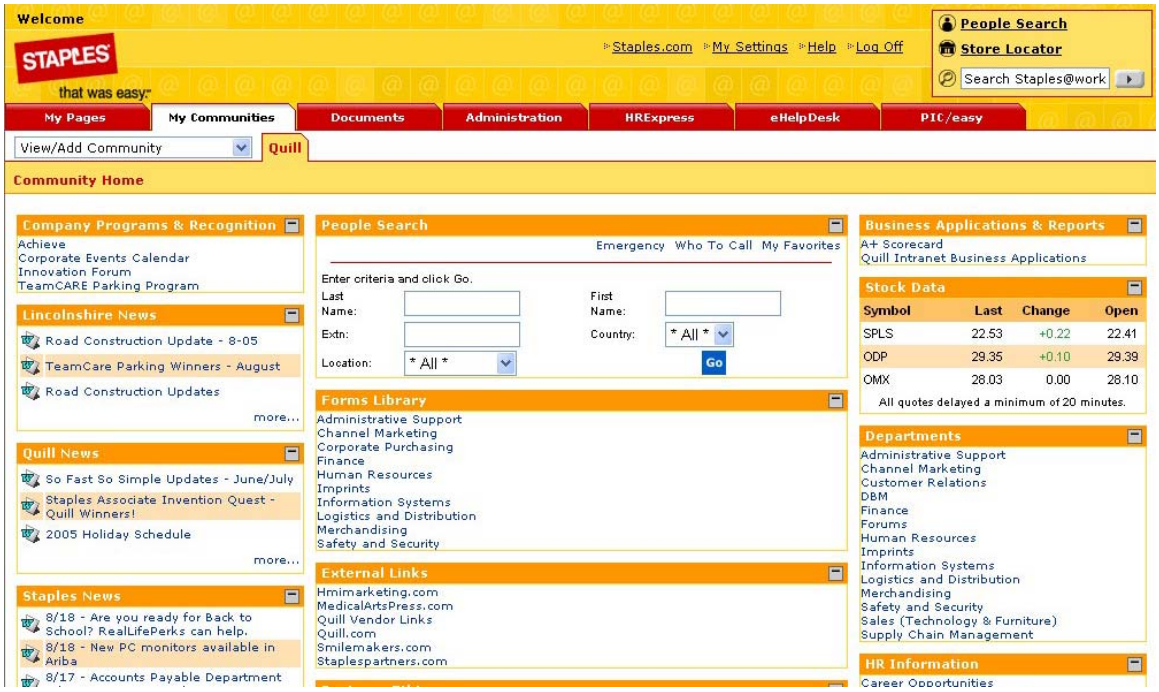
Pictured: The *Report2Web* tool gives managers access to needed metrics, including inventory reports, sales goals, and budgets.

Beyond management tools, almost all employees can create personalized *My Pages*. "These pages can include a combination of work-related portlets as well as personal interest portlets like 'find a movie,' personalized news, weather and stock information, area traffic reports, and self-administered lists of frequently used links," notes Woisard.




Pictured: Staples employees can create personalized *My Pages*.

While new technology brings behind-the-scenes improvements to community functionality, an improved nomenclature also drives greater employee use of communities. Already, there are more than thirty-five communities on Staples@work, with such names as *Home Office and Field*, *HR Express*, *Store General Managers*, *Supply Chain*, *Single View of the Customer*, *Staples@work Portal Team*, *UK Retail*, and *Germany Retail*.




Pictured: An example of a community homepage for Quill Corp., an office supplies direct marketer based in Lincolnshire, Illinois, which was acquired by Staples in 1998. (Quill and Quill.com operate as a separate brand from Staples, serving small to medium sized business customers.)

For new employees, a variety of portal-based training tools help them get quickly oriented. Information presented via such tools varies widely, since orientation necessarily differs by job function and business unit. As a result, proffered information can range "from basic indexed documents with efficient access, to all pertinent new-hire information and requirements, to online courses about the company's history and philosophy," says Woisard.

A related tool is for the management personnel responsible for training new employees. In particular, she says, "the portal gives access to the *Retail New Hire Toolbox* that insures all regulatory and business-critical disclosures and documentation are shared and processed, and that the new associate is informed of all the training available to promote success within the company."

## LESSONS LEARNED

Insights from Ben Cornish:

**Secure early vendor involvement.** "Probably one of the biggest lessons learned during the redesign was to seek vendor involvement and partnership early, and communicate with them continually throughout the project. As we faced hurdles, or questions during the upgrade, it was easier to seek support from the vendor and technical experts, since we had kept in close contact from the start."

**Get executive-level sponsorship.** "Strong executive sponsorship within Staples allowed us to leverage the relationship between our executives and the vendor's senior management team to quickly resolve any concerns that could have otherwise jeopardized the project."

Insights from George Levesque:

**Think in small iterations.** "While not a new lesson, user feedback reinforced this fact: iterative modifications that slowly and consistently improve and enhance your site are easier for end users to absorb than large-scale, dramatic changes."

**Use large-scale changes for effect.** "While our standard philosophy supports smaller, iterative changes, we felt pairing several iterative changes with a very costly upgrade of the portal's backend software gave this redesign excellent visibility. Rolling some of our iterative changes into the much-bigger software upgrade and redesign project dramatically increased both the actual and perceived return on investment."

**Design is not democratic.** "For design and usability, one lesson learned is: Design development cannot be a democratic process. While everyone's voice should be heard during the discovery and testing process, subsequent, actual design decisions and processes should not involve representatives from all parts of the portal team. For example, while the IS team offers essential input into what can or cannot be built using the chosen technology, they do not have the interactive design or usability expertise to help develop such aspects of the site as the graphical design, page layout, or navigation flow."

# Barnes & Noble

**Using the intranet:**

Barnes & Noble is the world's largest bookseller and is a member of the Fortune 500. It employs more than 40,000 booksellers in approximately 800 stores in all 50 US states. The company is the nation's only bookseller with a fully operational multi-channel strategy—with retail locations from coast to coast and an online subsidiary, Barnes & Noble.com. Barnes & Noble also has its own self-publishing program and, in 2003, it acquired Sterling Publishing, which has nearly 10,000 titles.

**Headquarters:** New York, NY (US)

**Number of employees the intranet supports:** 40,000

**Locations:** Bookstore locations in all 50 US states

**Sales:** $5.3 billion consolidated sales (Barnes & Noble stores and BarnesandNoble.com)

**Design team:**

Barnes & Noble hired a design agency (frog design) to kick-off the redesign effort for the site, but today the site is maintained completely by internal staff. Design and development is managed by an internal team of seven staff members: the director, a business analyst, a designer, and four developers, all of whom report to the IT department. Editorial is managed by a director and internal communications specialist from the Corporate Communications department.

**Members:**

**Barnes & Noble:** Mary Ellen Keating, Senior Vice President of Corporate Communications & Public Affairs; Glenn Kaplan, Vice President/Creative Director; Tom Williams, Director of Web Services; John Daidone, Director of Content Management; Becky Gardner, Director of Store Operations; Alexander Greenberg, Senior Systems Analyst; John Hoge, Systems Analyst; Julio Soler, Web Designer (former employee); Said Slimani, Senior Systems Analyst (former employee)

**frog design**: Andrew Foley, Director, Program Management; Valerie Casey, Creative Director; Matt Ipcar, Principal Designer; Clay Wiedemann, Senior Design Analyst

## SUMMARY

When an organization includes many different job functions, choosing a specific target user group to design for takes foresight and decisiveness. And it can be downright scary. But this audacious effort is what makes the Barnes & Noble intranet so notable. It's designed primarily to support the core function of selling books. The site's features and design considerations were chosen to target the more than 40,000 booksellers in approximately 800 stores located in all 50 US states. And, while the site is primarily intended for booksellers working in the Barnes & Noble retail stores, the site also supports corporate employees as a secondary audience.

To support the booksellers, designers created a community among these professionals by promoting store events, sharing best practices, recognizing exceptional booksellers, and so on.

The center of the homepage displays news, focusing on happenings at the various stores. For example, the winner of a Harry Potter fan contest is interviewed and photographed. The *What We're Reading* article helps booksellers to share insights on good books. And an article about the *Best Bookstore* honors a store for high ethics.

Each day, the intranet team publishes references to Barnes & Noble appearing in the news in the *In the News* section, located in the homepage's right-most column. Topics range from national PR initiatives to in-store events such as the Harry Potter "Midnight Magic" parties.

In addition to varied types of news and *Featured Events,* the intranet team also strives to keep booksellers abreast of upper management's recommendations—

namely, books and products that booksellers should aggressively promote. The intranet allows the corporate office to issue daily tasks and information to booksellers on everything from how to better merchandise a product to how to remove defective or discontinued items.

BARNES & NOBLE inside

Sign In | Help ?

Friday, July 13, 2007 BKS 39.08 (-0.17)

Our Company | HR/Benefits | Merchandise | Learning Center | Reference | Search

## Store Alerts

July 12, 2007
- Promotions for "This Week at Barnes & Noble" (7/10 - 7/23)
- Our Staff Recommends End Date
- Reminder to Display "Last Chance" Bargain Vestibule Sign
- Book Department Music Stepladder

July 11, 2007
- Best Loved Christmas Carols Shipped Early

More >

## Archives

Choose Category:

All

Go!

## New Stores

April 26, 2007
IL/Chicago/Bolingbrook
Bolingbrook, IL

June 20, 2007
CA/Los Angeles/Glendora
Glendora, CA

June 27, 2007
Pico-Westwood
Los Angeles, CA

July 18, 2007
VA/Roanoke/Valley View Mall
Roanoke, VA

August 01, 2007
NC/Burlington/Alamance Crossing SC
Burlington, NC

# Barnes & Noble Today

### Meet Me at Barnes & Noble

The new store locations and events site launched this week, with enhanced features which transform the site into a social networking tool.

### Harry Potter Contest - Region 5 Winner

Daniel Pierce of Store 2846 has an obsession with Harry Potter and often asks himself "What would Harry do?"

**Selected photos of other Region 5 contestants**
**Region 1 Winner - Jessica Davenport**

### Junie B. Jones Stupid Smelly Bus Tour Rolls Into Store 2697

More than 600 fans came out to see Junie B. Jones and friends at Store 2697 in Fairless Hills, PA.

### Customer Service Excellence at Store 2566 in Plano, TX

Store 2566's staff has consistently delivered excellent customer service, earning them 19 consecutive 100% scores on their customer service shops.

### What We're Reading

Earning rave reviews, Vice President/Creative Director Glenn Kaplan's new book, *Evil, Inc.*, tells the tale of mischief and crime in the corporate world.

### SparkNotes Enhancements

Just in time for back to school, we are refocusing and relaunching our Spark Publishing lines.

### Best Bookstore Honors

Representatives from Store 2127 (pictured) were honored for marketplace ethics. Other recent award recipients include stores in the Northern Kentucky/Greater Cincinnati and Las Vegas areas.

## Story Request

If you didn't get the opportunity to post your customer service story to Steve's recent blog, send it to customerservicestories@bn.com. Your story may appear on Inside, in Community or a learning guide. Thank you.

## In The News

July 12, 2007
Local Harry Potter midnight magic parties at Barnes & Noble stores ... GameStop to host NCAA Football 2007 video-game tournaments ...

July 11, 2007
July 10, 2007

More >

## Featured Events

July 12, 2007
Series character Junie B. Jones visited Store 2697 for a theatrical performance and book signing.

July 03, 2007
Russell Simmons and Janet Evanovich visit Store 2154 and Store 2615, respectively, meeting their fans and signing copies of their new books.

June 29, 2007
Fans get one-on-one time with musician Chuck Brown to hear tales from his celebrated career and about his new CD.

June 25, 2007
Stores nationwide are hosting parties to encourage kids to keep reading this summer.

More >

## Did You Know?

SparkNotes (originally TheSpark.com) began as a web-based dating service. With a user base mostly of high school and college students, the site began offering online literary study guides to entice return visitors.

**View archive**

Home | Store Alerts | Code of Business Conduct & Ethics | Site Map

**Our Company**
Company Profile
From Steve
In the News
Press Releases
Openings & Awards
Community

**HR/Benefits**
HR Headlines
Using Your Benefits
Discounts
We Listen
People

**Merchandise**
What's Hot
What We're Reading
Barnes & Noble Recommends

**Learning Center**
Store Best Practices

**Reference**
Reference Center
Store Directory
Whom To Call

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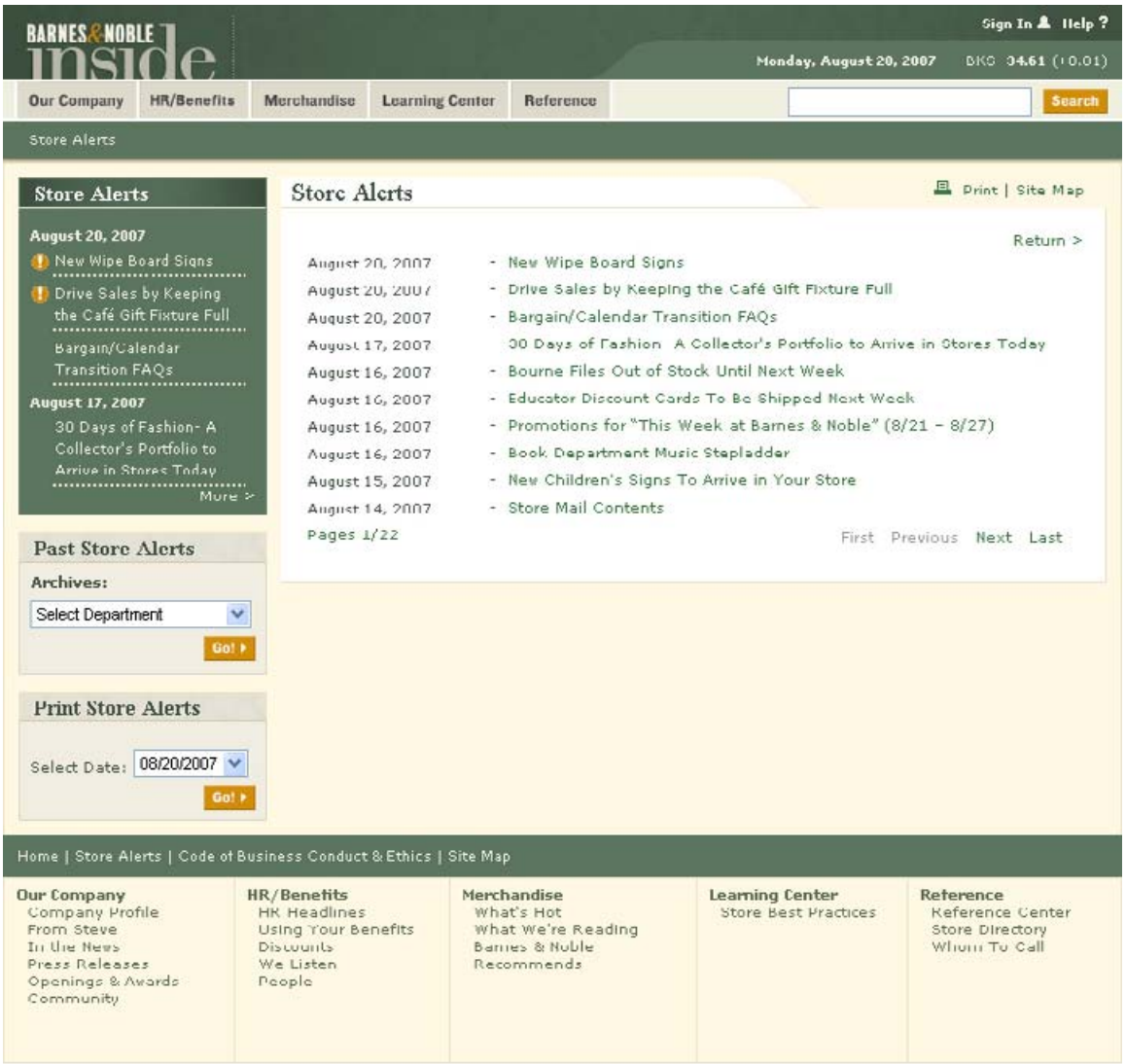
Pictured: The Barnes & Noble homepage builds community among booksellers by informing them of happenings at stores across the US.

The *Store Alerts* area in the homepage's upper left section houses this information. It's the site's most heavily trafficked area. Here, users can see a synopsis of all store alerts for the most recent two business days. *Store Alerts* are managed and edited by the Barnes & Noble Store Communications team. In some cases, the team even writes the alerts, but typically, the people from the corporate office who want to issue the note also write the alerts. For example, the Café Manager of Product Development writes a weekly alert on recommended items for the café gift fixture.

The intranet team's goal is to post alerts by 1:00 pm Eastern Standard time, so people on the East Coast can read them at lunch, and people on the West Coast can read them in the morning. The alerts change every day, and the number of alerts per day can range from one to 10, or occasionally even more.

Because the *Store Alerts* contain important information, the team keeps alerts in an archive for three months. Users can browse the archive by category or look at all alerts for a particular day. If people really want to keep particular ones around, a print capability makes it simple to do so.

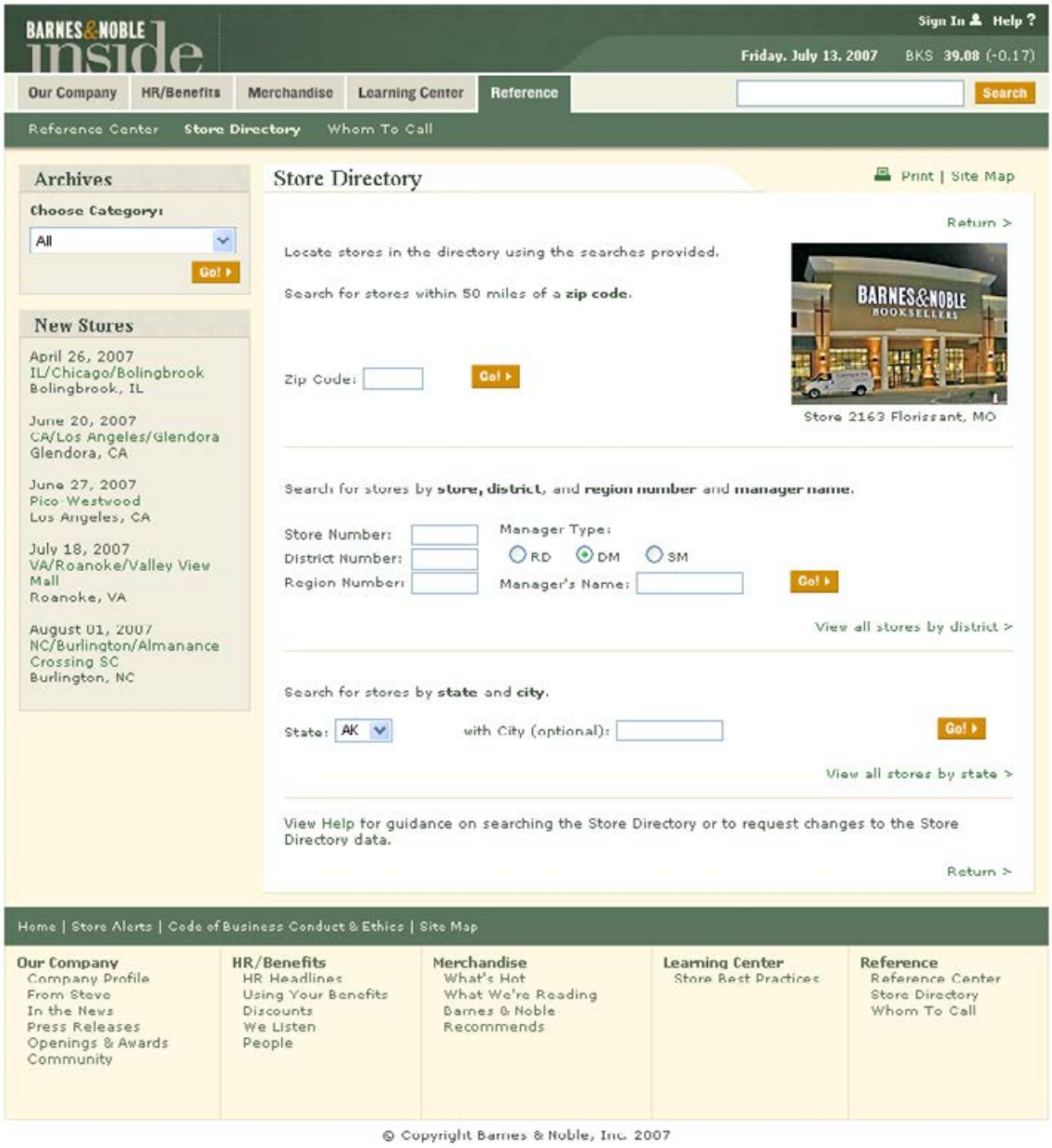
Clicking the homepage's *More* link leads to more *Store Alerts* features.



Pictured: Booksellers can read the *Store Alerts*, search the alerts archive, view alerts by date, and easily print them.

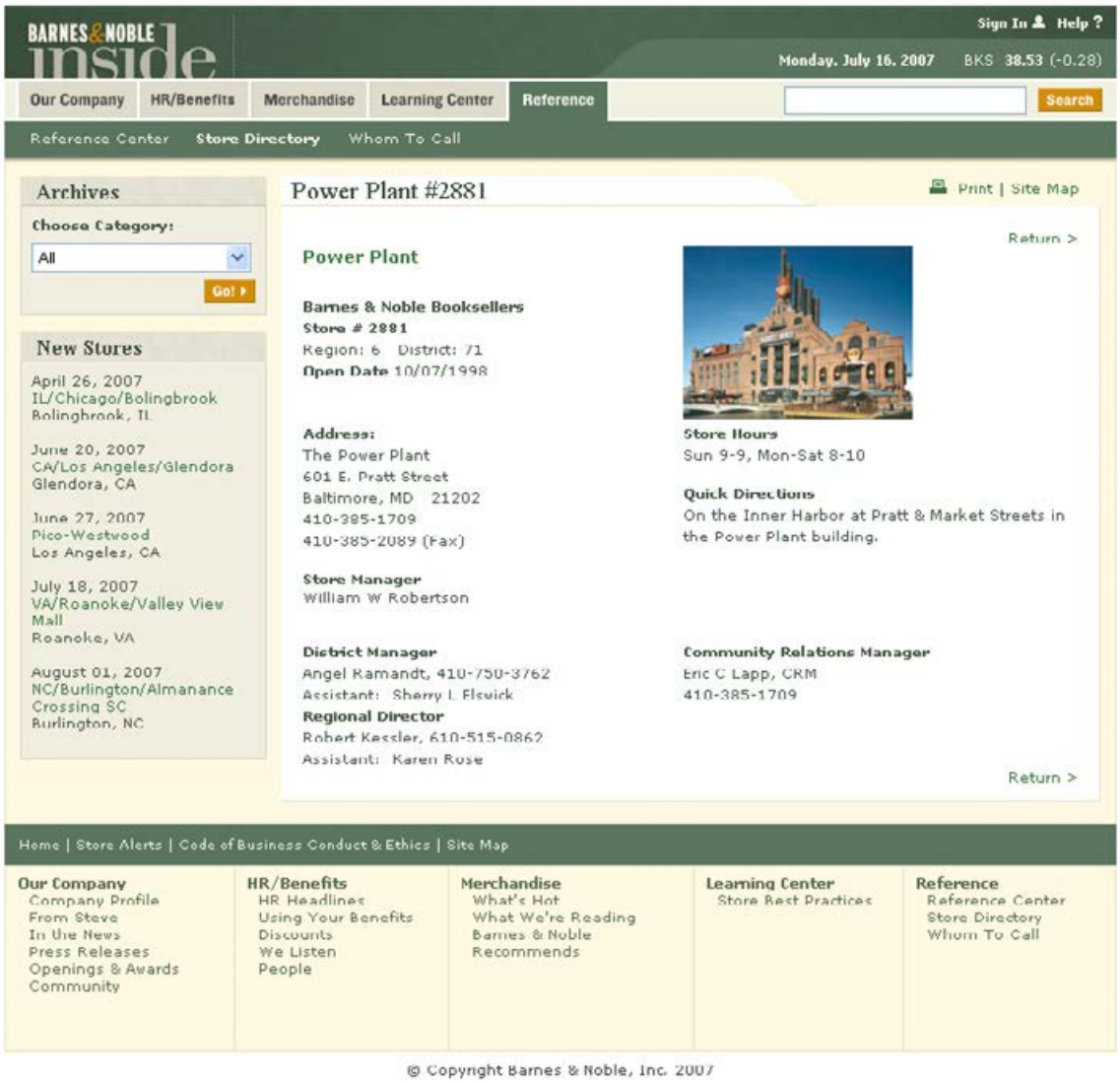
Another way the intranet assists booksellers in communicating with each other is via the *Store Directory.* Employees can search for a store or a person, choosing various criteria such as: zip code, state/city, store number, district number, or region number. Users can also browse by state or district. In addition, they can search for particular people within a section of the organization hierarchy—such as "all stores in the NY Metro district."

Many people across the organization use the *Store Directory,* from store employees to people in the corporate offices and in the field.




Pictured: Employees can search for stores using various criteria.

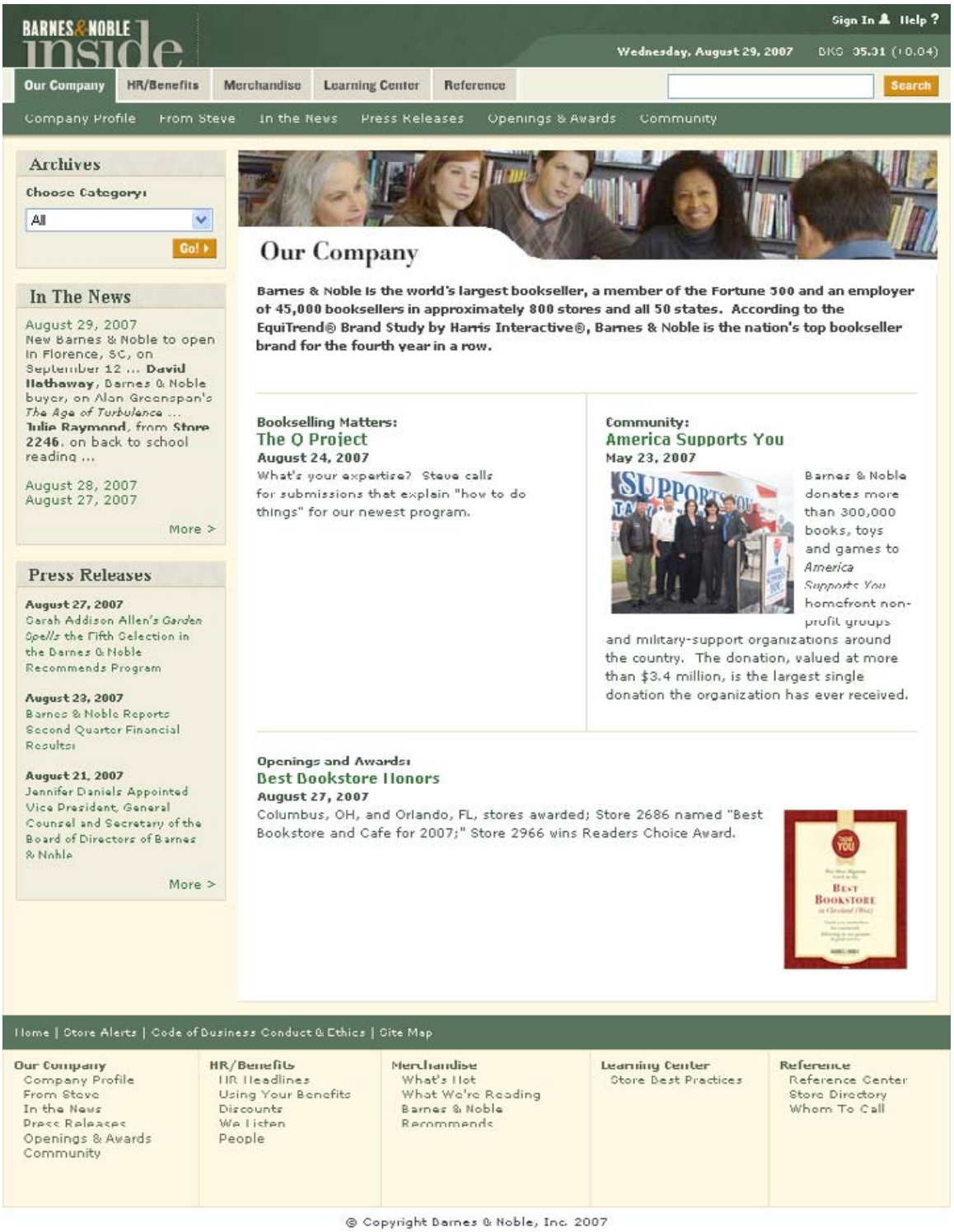
Each store's page displays the most important information for communicating with people at the store. Each displays a picture of the store, the address, store hours, and a short entry for *quick directions.* It also notes the people in charge of the store, including the store manager, regional director, and district manager, along with their telephone numbers and assistants' names (when applicable).




Pictured: Each location's page displays the address, contact names, an image, and other information.

Often, intranets offer too many menu choices for users to easily manage. The top, global navigation on the Barnes & Noble intranet is limited to just a few choices: *Our Company, HR/Benefits, Merchandise, Learning Center,* and *Reference.* Most of these are self-explanatory to users.

The *Our Company* section makes people aware of happenings at and information about Barnes & Noble. News, press releases, and notes about the communities help link the different booksellers together. The white space around the page makes it seem uncluttered and digestible.




Pictured: The *Our Company* section houses some news, press releases, and notes about the communities.

BARNES & NOBLE inside

Sign In Help ?

Friday, July 13, 2007 BKS 39.08 (+0.17)

Our Company | HR/Benefits | Merchandise | Learning Center | Reference | Search

What's Hot | What We're Reading | Barnes & Noble Recommends

## Archives

Choose Category:

All

Go!

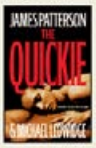
## What You're Reading

We get some of our best ideas from booksellers in the field. If you're reading a great book please send us a brief review of it to share with your fellow booksellers.

Submission Form >

## Weekly Bestsellers

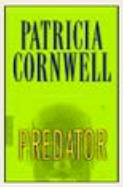
#1 Fiction:
*The Quickie*




#1 Non-Fiction:
*The Secret*

## Weekly Bargain Value

*Predator*
0641804687
Bargain Price: $6.98
Compare at $26.95



# Merchandise

## SparkNotes

There are big changes planned for SparkNotes just in time for back to school. We have freshened up the lines and provided new promotional vehicles in order to better highlight our key brand.

**SparkNotes Test Prep Bay**

This is now a true promotional bay designed to highlight strong new products, as well to promote the season's key test prep titles. In July's launch, we will focus on introducing *Spark Your Career*. These 5 new titles are perfect for the college student. Containing information on how the industry works to getting that important internship, these books are key for anyone looking to break into film, fashion, book publishing, advertising and magazines.

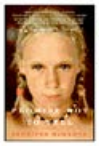
Also in July, we are focusing on the key back to school titles, SAT, ACT & the SAT Subject Tests. The visibility of these titles at this key period of the year should push them to the top of your study aids bestseller lists.

Tying into the back to school rush, the Spark publishing team took a strong look at our literature notes. Comparing these standard titles to current school concerns, they found a wonderful way to add value to an already powerful line. We are re-launching the line in July with the Top 50 titles now containing an additional 16 pages devoted to writing a literary essay. This includes a glossary of literary terms, step-by-step tutoring on how to write a literary essay, and a feature on how not to plagiarize. Each book will also include an A+ Essay; an actual literary essay written about the Spark-ed book, to show students how an essay should be written.

Since the main focus in schools is writing, adding this new section should really boost sales!

**Contributed by Lisa Eichenthal, Study Aids Buyer**

**What's Hot:**
### Promise Not To Tell
**June 15, 2007**



All is not as it seems in a bucolic Vermont commune. *Promise Not To Tell* promises to be a great beach read.

**What We're Reading:**
### Evil, Inc.
**July 10, 2007**

*Evil, Inc.* is a corporate thriller from a new author in our corporation.

**Barnes & Noble Recommends:**
### Stormy Weather
**May 31, 2007**

Our next Barnes & Noble Recommends selection is an epic set in the Great Depression.

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**Our Company**
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What's Hot
What We're Reading
Barnes & Noble Recommends

**Learning Center**
Store Best Practices

**Reference**
Reference Center
Store Directory
Whom To Call

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Pictured: The *Merchandise* area shows top selling books and gives recommendations.

The *Reference Center* is a compilation of print HR and Store Operations encyclopedias. Topical areas include *Assisting Our Booksellers, Serving Our Customers, Daily Operations,* and *Safety & Security.* In the earliest design meetings, designers discussed the reference material available on the old site (bninside) and how much of it had atrophied or become incomplete. When designing the new site, designers wanted to include the best and most recent version of the organization's most commonly used print material, and to make the content easy to navigate and search.

The *Resource Center* is a secure site on the Barnes & Noble intranet. Managers and corporate users view sales and payroll reports, HR tools, and other sensitive resources. Category names and alphabetized links make them easier to find on the page.

Pictured: The secure *Resource Center* has sales and payroll reports, HR tools, and other sensitive resources.

Barnes & Noble designers meld bold choices with a soft color palette to create a very useful intranet for booksellers and corporate users alike.

## URL AND ACCESS

The URL for the intranet, Barnes & Noble Inside, is: http://bninside/. Within Barnes & Noble's corporate office, the browsers are set to default to the intranet; inside the stores, the site is accessible from every terminal except for the Community Relations Manager terminal. Each store's retail point of sale (POS) system features a link to the intranet on its homepage.

Corporate and field employees (regional directors, district managers) can access the intranet from home or remotely via VPN. Store employees (booksellers) do not have home access.

Although not yet designed or optimized for mobile devices, corporate and field users can access the intranet via their Blackberries.

## TECHNOLOGY

The site was designed using Adobe Creative Suite, Web Edition, along with Dreamweaver and Home Site to support the creation of HTML and CSS.

Content is managed using Serena Collage, along with custom extensions developed in-house for migrating data and content to the site. Large-scale data imports are managed through code developed on top of Microsoft SQL Server Integration Services.

The site is served using a farm of HP Proliant DL380s servers running Windows 2003 Server and IIS 6.0. The application is an ASP.NET 2.0 Web application (C#) that retrieves data from a clustered SQL Server 2005 database. "The entire architecture here is designed to be simple, yet highly available," boasts Thomas Williams, director of Web Services, IT. "Other than a few short maintenance windows we have scheduled during off hours, the architecture has maintained 100% uptime since launch."

For issue tracking, the team is using Serena Tracker while they explore other options. They did much of the QA using Store Systems QA lab.

Finally, site search and indexing is handled by Google (2nd generation) Search Appliances, and the intranet team tracks the most common searches and reviews them with the company's Inside Steering Committee every two months.

## CONTENT MANAGEMENT SYSTEM

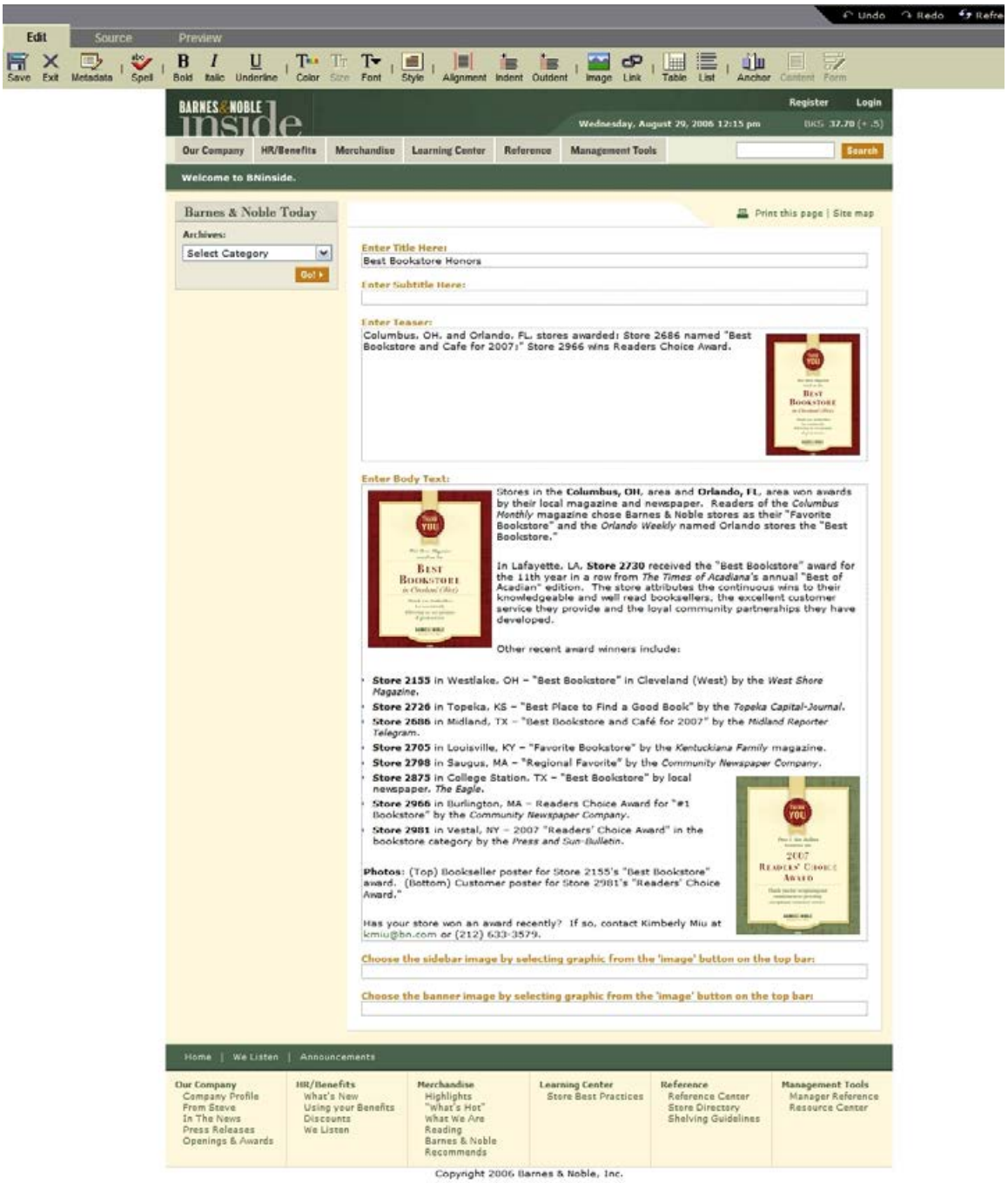
### CMS Technology

Barnes & Noble Inside's content is maintained using Serena Collage, a Java/J2EE Web-based application with Oracle on the back end. According to Williams, client-side Java applets are included with the system. "The custom applications we developed for the rest of the management utilities are written in C# through Microsoft Visual Studio and, in some cases, leverage the functionality of Microsoft SSIS," he says.

"Content and data for the site are managed differently than had been done in the past," says Williams. "Initially, content for the site was managed through the development of a home-grown administration tool. The benefit was that we could offer a customized interface for content administrators independent of the nuances and complexities of a particular type of content. The issue was that custom work done for the administration tool would borrow development time from enhancements to other areas of the site."

He estimates that the team was spending 60% of its project development time improving and customizing the CMS. These efforts were hindering progress on the site as a whole. As part of the redesign, the team looked for a third-party CMS that could offer a wider feature set than they could develop internally, without sacrificing the quality or the site's content.

Serena Collage lets the team export contributed content for inclusion on Inside and other sites. The system's design-time nature allows them to post-process or otherwise manipulate the content in a manner that best integrates it with the application code.



Pictured: An edit screen from Serena Collage, Barnes & Noble's content management tool.

Although the in-house Barnes & Noble team applied these post-processing extensions and other customizations, the overall application was not custom-built. "We brought in Collage largely for the CMS pieces we did not want to build in-house, such as workflow management and WYSIWYG editing through the Web," says Williams. "For data integration sections such as the *Store Directory*, we developed our own software to manage the processes."

## Content Ownership

Management staff distributed across the Inside Steering Committee handles content authoring. "Individual members are responsible for their respective sections of the site," says John Daidone, Director of Content Management, Corporate Communications. "For example, the vice president of human resources 'owns' the HR/Benefits section of the site and is ultimately responsible for all of the content in that section."

"As the navigation and structure of the site is largely congruent with the organization hierarchy of Barnes & Noble," says Williams. "It was natural to place ownership of each section of the site with the members of the Inside Committee that represent each department."

## Standards, Templates, and Training

The design team ensures the design standards are maintained by installing the appropriate content templates for each section of the site in the CMS and most of the formatting is handled through CSS. Training was provided for each content manager on how to use and contribute to the CMS.

Distributing and updating the templates is simple because the CMS is Web-based. The team can easily change and upgrade the templates in one location once they're installed and configured in the CMS. All changes to user-contributed content are tracked through the CMS as part of Collage's base functionality.

"We conducted content manager training sessions and created a training document that users can refer to," says Daidone. "The document includes information on creating tasks and articles, as well as best practices for creating images and tables, naming conventions, etc." The team also created an editorial style guide that includes sections on editorial strategy, writing for the Web, and terminology.

## Supporting Contributors

Because some content managers were new to Web publishing, the team quickly realized that they would need support. "Our Learning and Development team stepped in and worked with John and me to develop learning materials that were invaluable in getting people comfortable with the system and the processes," says Williams. "The training classes helped to facilitate that."

The following screens illustrate how content and comments are maintained on CEO Steve Riggio's popular weekly blog, *Bookselling Matters*. Riggio uses an administrative tool that the team developed so he can personally review and respond to comments from booksellers.

BARNES & NOBLE inside

Sign Out | Help ?

Wednesday, August 22, 2007 BKS 35.01 (+0.40)

Our Company | HR/Benefits | Merchandise | Learning Center | Reference | Management Tools | Search

Manager Reference | Resource Center | Comments Administration

Archives

Choose Category: All Go!

## Comments Administration

Print | Site Map

Pending | Approved | Not Approved

| Comment/Response | From | Date | |
|---|---|---|---|
| **Comment:** A take on the categorization issue:I run the bargain department and sometimes I come across somethin... **Response:** We certainly want to correct mistakes but there are also may opinions about what category a book sho... | Kelly Kramer, Store 2594 in Greenfield, WI | 8/11/2007 6:02:11 PM | Details |
| **Comment:** This is another completely off-topic remark, but I was really happy to see that you're listening to ... **Response:** I think it is a great cd. Have you seen "7 World's Collide" - the DVD of Neil's performan... | Jared Duran, Store 2211 in Phoenix, AZ | 8/11/2007 8:49:54 PM | Details |
| **Comment:** As a librarian, bookseller, and geek of many tribes, let me add some understanding to the whole shel... **Response:** You got it. | Torsten Adair, Store 2628 in New York, NY | 8/12/2007 5:31:50 PM | Details |
| **Comment:** I'd like to recommend an album - Baby Comes Home by Patrick Cleandenim. There is some bias since tw... **Response:** Here is an unbiased review from the All Music Guide: "but a more careful listen reveals Patrick... | Caitlin Roberts, Store 2000 in Greensburg, PA | 8/12/2007 7:22:05 PM | Details |
| **Comment:** Steve, Those are exciting releases, but don't forget the October 2 release of Day Of Battle, the se... **Response:** All WWII books are going to take off, from classic backlist to never series. This is going to be ex... | Jack Hoey, Store 1076 in Charlotte, NC | 8/13/2007 10:22:01 AM | Details |
| **Comment:** It sounds like Stephanie Meyer's "Eclipse" is destined for the Best Sellers. My Assistant ... **Response:** First day sales broke all records. The next book in the series will hit the stratosphere. | Mark Little, Store 2043 in Duluth, GA | 8/17/2007 10:27:37 PM | Details |
| **Comment:** Dear Mr. Riggio, Pardon me switching back to an older topic from the last blog, but with all the ... **Response:** I understand the frustration that our booksellers have but classification is a subjective process. ... | John Keese, Store 2031 in Roseville, CA | 8/10/2007 1:03:26 AM | Details |
| **Comment:** Speaking of Jones Soda, why do we only sell the juices and not the actual sodas? Jones has a specta... **Response:** Our cafe folks are always looking at our selections. We try to keep it changing but also not too ca... | Michael Lucero, Store 2919 in Charleston, SC | 8/18/2007 12:05:43 PM | Details |
| **Comment:** Mark Bottini would be an excellent guest blogger! **Response:** I will let him know. | Bradley Hack, Store 2196 in Louisville, KY | 8/18/2007 12:39:31 PM | Details |
| **Comment:** I vote for your brother, Len to be a guest blogger when you're on vacation. Matter of fact, I would... **Response:** I know that he has something to say but I don't think blogging in his style. | Karl Lindner, Store 2260 in Plainfield, IN | 8/10/2007 3:00:00 PM | Details |

Home | Store Alerts | Code of Business Conduct & Ethics | Site Map

**Our Company**: Company Profile, From Steve, In the News, Press Releases, Openings & Awards, Community

**HR/Benefits**: HR Headlines, Using Your Benefits, Discounts, We Listen, People

**Merchandise**: What's Hot, What We're Reading, Barnes & Noble Recommends

**Learning Center**: Store Best Practices

**Reference**: Reference Center, Store Directory, Whom To Call, Whom To Call Administration

**Management Tools**: Manager Reference, Resource Center, Comments Administration

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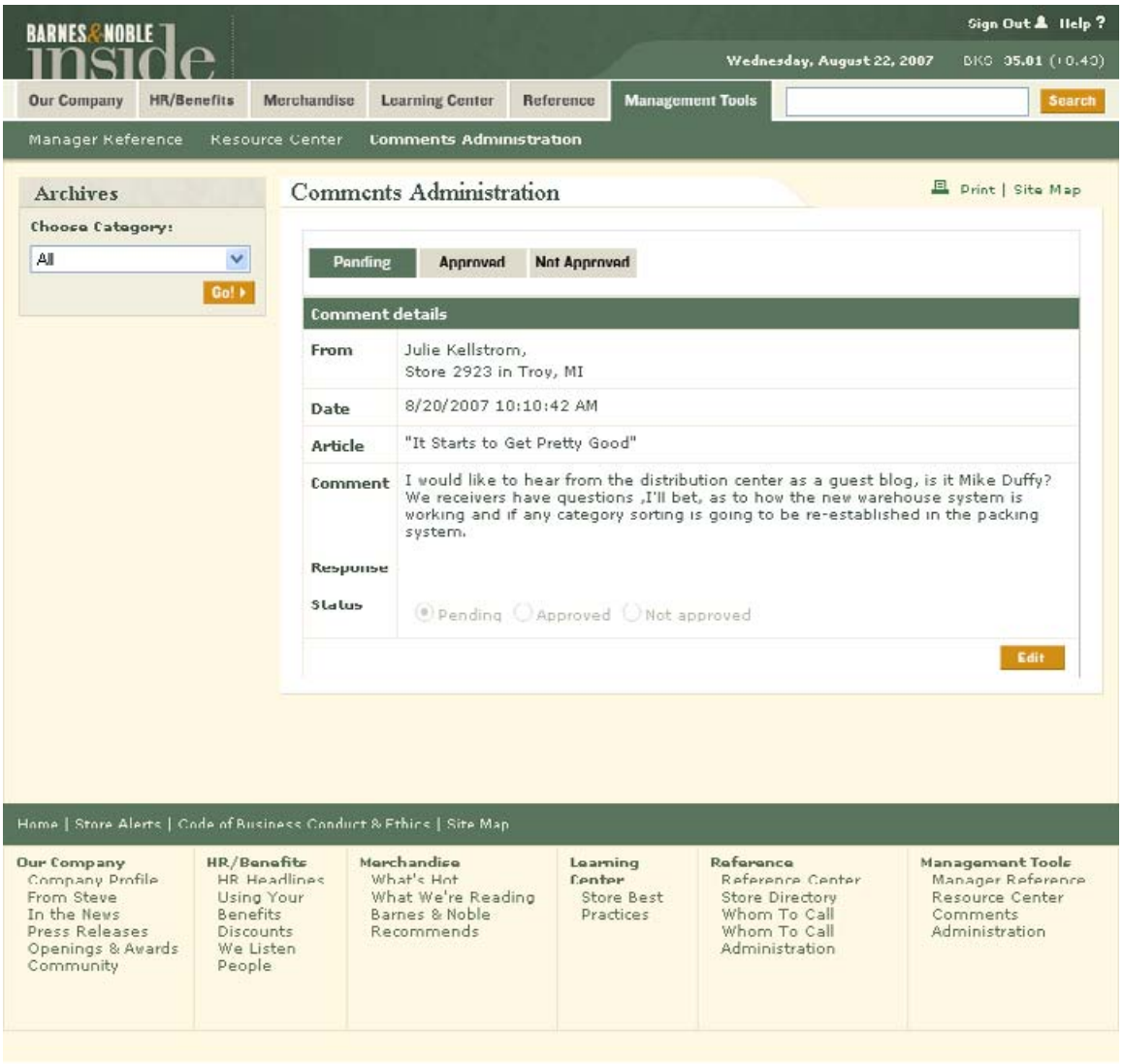
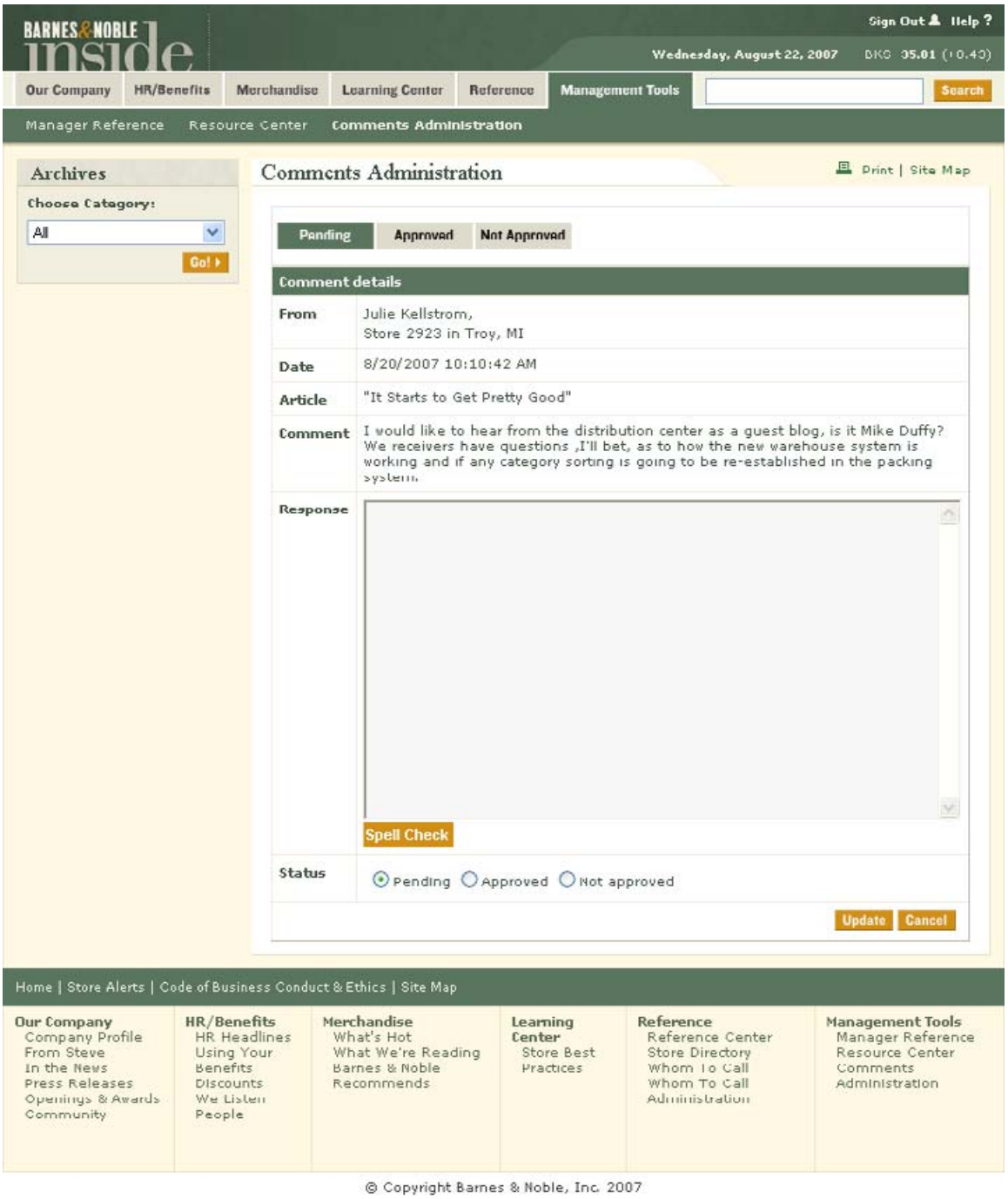
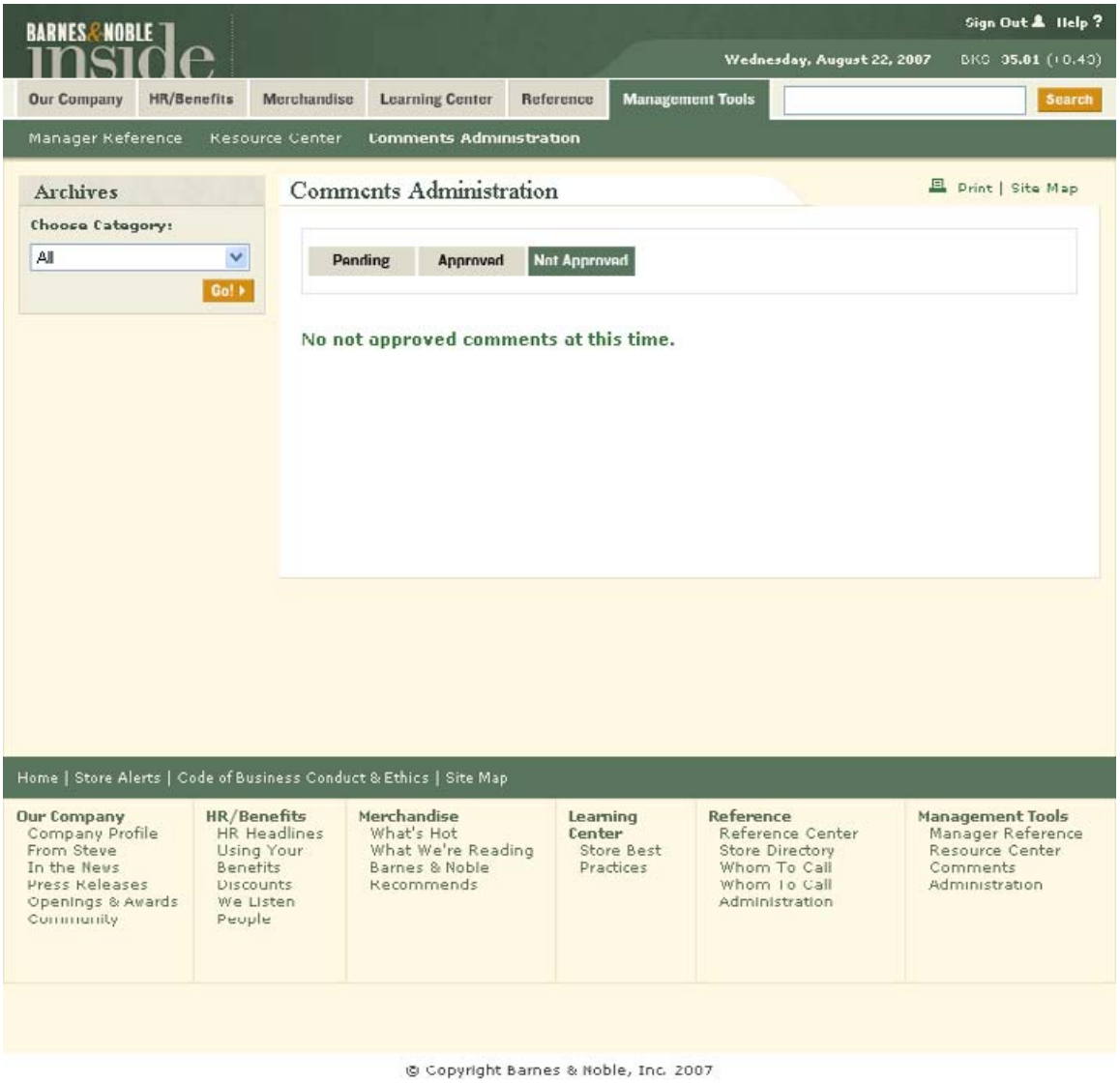
Pictured: A content administrator's approval screen from Serena Collage, Barnes & Noble's content management tool.




Pictured: A detailed view of the content administrator's approval screen from Serena Collage, Barnes & Noble's content management tool. In this view, a content administrator can respond to a post and mark it as approved or pending.




Pictured: In this view of the content management edit screen, an administrator can edit a posted comment.




Pictured: The confirmation screen for content that administrators have yet to approve.

BARNES & NOBLE inside

Sign Out | Help ?

Wednesday, August 22, 2007 BKS 35.01 (+0.43)

Our Company | HR/Benefits | Merchandise | Learning Center | Reference | Management Tools | Search

Manager Reference | Resource Center | Comments Administration

## Archives

Choose Category:

All

Go!

## Comments Administration

Print | Site Map

Pending | Approved | Not Approved

| Comment/Response | From | Date | |
|---|---|---|---|
| **Comment:** I would like to hear from the distribution center as a guest blog, is it Mike Duffy? We receivers ha... **Response:** | Julie Kellstrom, Store 2923 in Troy, MI | 8/20/2007 10:10:42 AM | Details |
| **Comment:** My vote goes for Chuck Gorman as guest blogger. It'd be GREAT to have more blogging discussion on o... **Response:** | Marcella Jones, Store 2594 in Greenfield, WI | 8/20/2007 10:44:40 AM | Details |
| **Comment:** Regarding the "who goes where" topic, do the buyers log the correction suggestions that bo... **Response:** | Christopher Shellabarger, Store 2224 in Collierville, TN | 8/20/2007 11:44:37 AM | Details |
| **Comment:** My votes for guest blog would be Mark Bottini, Chuck Gorman or maybe Dear Bookmaster. Dear Bookmaste... **Response:** | Stephanie Ray, Store 2244 in Flint, MI | 8/20/2007 12:05:59 PM | Details |
| **Comment:** In the Music department, High School Musical's sequel is due to air on Disney Channel next weekend a... **Response:** | Cori Cross, Store 2983 in Mandeville, LA | 8/20/2007 2:18:38 PM | Details |
| **Comment:** So this summer is almost over, and I never noticed a certain title on your reading list. Has anothe... **Response:** | Brandon Galm, Store 2079 in Mentor, OH | 8/20/2007 2:48:25 PM | Details |
| **Comment:** Dear Mr. Riggio, The Language Instinct: How the Mind Creates Language by Stephen Pinker was requi... **Response:** | Greg Schroll, Store 1963 in Farmington, CT | 8/20/2007 4:23:30 PM | Details |
| **Comment:** I was curious if there was any possibility that some Barnes & Noble locations might begin to car... **Response:** | Daniel Pearson, Store 2911 in Long Beach, CA | 8/20/2007 4:39:22 PM | Details |
| **Comment:** Regarding guest bloggers... I'd like to see maybe a co-blog, where you pick a topic, and then selec... **Response:** | Torsten Adair, Store 2628 in New York, NY | 8/20/2007 7:31:14 PM | Details |

Home | Store Alerts | Code of Business Conduct & Ethics | Site Map

**Our Company**
Company Profile
From Steve
In the News
Press Releases
Openings & Awards
Community

**HR/Benefits**
HR Headlines
Using Your Benefits
Discounts
We Listen
People

**Merchandise**
What's Hot
What We're Reading
Barnes & Noble Recommends

**Learning Center**
Store Best Practices

**Reference**
Reference Center
Store Directory
Whom To Call
Whom To Call Administration

**Management Tools**
Manager Reference
Resource Center
Comments Administration

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Pictured: A content administrator's view of content pending approval.

Pictured (from left): The Barnes & Noble intranet team: John Daidone, Director of Content Management; Alexander Greenberg, Senior Systems Analyst; John Hoge, Systems Analyst; Thomas Williams, Director of Web Services; Kimberly Miu, Internal Communications Specialist.

## INTRANET TEAM

Although Barnes & Noble hired a design agency (frog design) to kick-off the redesign effort, today the site is maintained completely by internal staff.

### Team Roles

As a starting point for building out the site for the 2007 re-launch, frog design provided templates for the Web Services team to use. frog staff members were also involved in the initial planning and IA phases.

Working with the agency gave the team the perspective it needed to see the site with fresh eyes and generate new ideas. "A benefit we have seen in working with other agencies is that it has deterred us from becoming myopic in our assumptions about what we might do in this space," says Williams.

| RUNNING THE SITE: STAFF BY THE NUMBERS | | | |
|---|---|---|---|
| **Intranet Team** | | | |
| **#** | **Role** | **Function** | **Department** |
| 1 | Director | • Oversees the platform, including the CMS<br>• Manages the Web Services team<br>• Provides training and support to the content managers using the system<br>• Oversees functionality additions to the site | IT |
| 1 | Business Analyst | • Coordinates and manages requirements gathering<br>• Builds project plans and manages tasks<br>• Develops the test plan and coordinates resources for testing | IT |
| 1 | Designer | • Provides Web graphics direction and support for the site | IT |
| 4 | Developers | • Review requirements and build new functionality<br>• Participate in unit testing<br>• Modify CMS and databases to support new contributions | IT |
| **Content Management** | | | |
| **#** | **Role** | **Function** | **Department** |
| 1 | Director of Content Management | • Manages the homepage and reviews and approves all content<br>• Communicates editorial style guidelines across the organization<br>• Trains content providers and content managers on writing skills | Corporate Communications |
| 1 | Internal Communications Specialist | • Assists Director of Content Management | Corporate Communications |
| 6 | Content Owners | Responsible for the content that appears in their intranet sections | Various |
| ~20 | Content Managers | Upload content to the CMS | Various |
| >100 | Content Providers | Write the actual content for the site (not technically part of the intranet team) | Various |

## Site Ownership

Governance of Barnes & Noble Inside resides in the Inside Steering Committee comprised of members from various parts of the organization: IT, HR, Corporate Communications, Store Operations, Merchandising, and Learning & Development.

This committee is responsible for issues impacting the site's operation. It also reviews and approves changes to roles and responsibilities, workflow processes, site functionality, user interface design, look and feel, and IA.

Development and change management tasks are handled through Web Services.

According to Daidone, the Inside Steering Committee was formed in the summer of 2006 to drive the new intranet's development toward a January 2007 launch. He also says that having site ownership through the Inside Steering Committee has been a successful approach for the company.

"It has certainly contributed to the improved stability and performance of the site as the development team is intimately involved in the requirements gathering and functionality analysis," says Williams. "In addition, the evolution of ownership through the Steering Committee has helped to ensure that all areas of the company are represented in the functionality and the content available on the site."

The intranet staff itself was originally composed of consulting resources who reported into the Store (Retail) Systems department. Over time, Store Systems provided full time staffing and support for additional enhancements to the original site.

As the redesign approached, a new group—Web Services—was developed within Barnes & Noble's IT area. One of Web Services' core responsibilities (when it was formed in 2004) was to take ownership of Barnes & Noble Inside (then bninside).

## BUDGET

As the following chart shows, the intranet redesign had three major budget items.

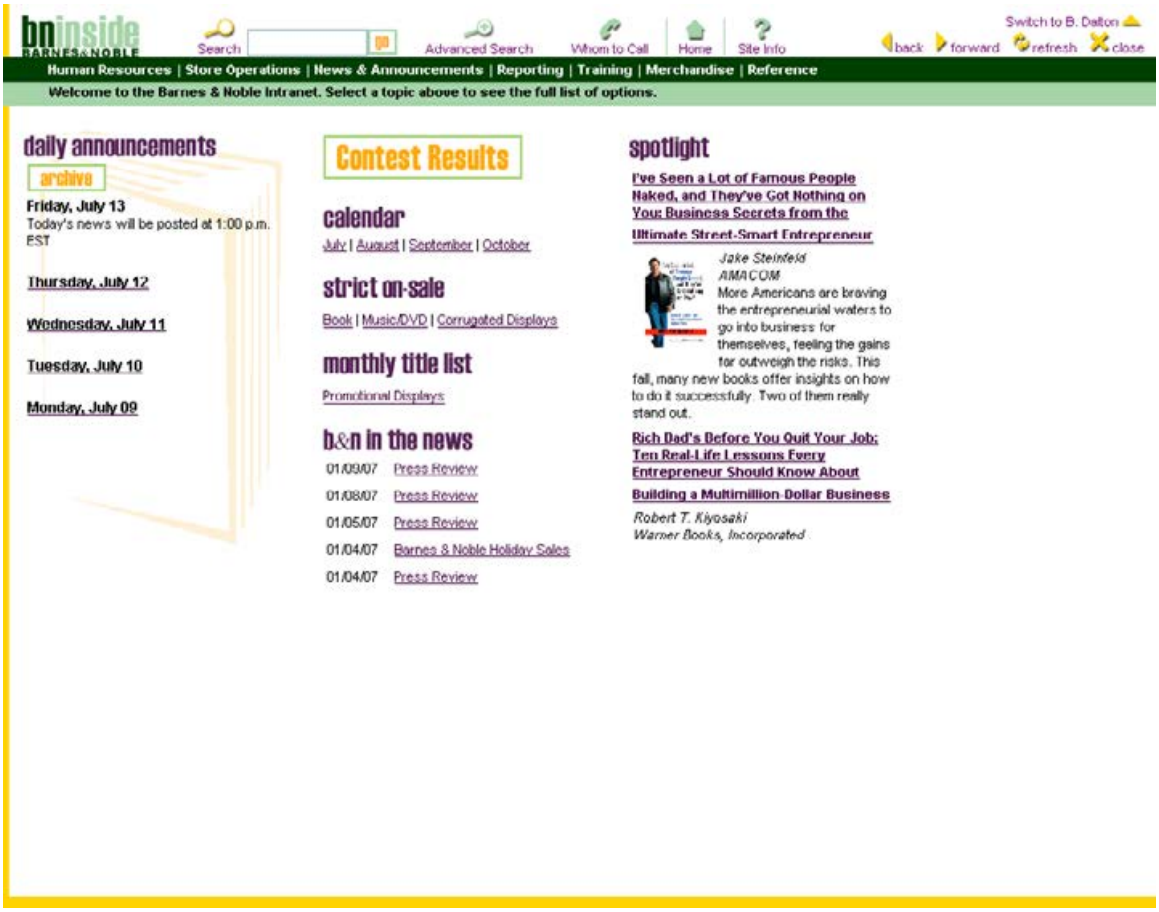
| REDESIGN BUDGET | | |
|---|---|---|
| $250,000 | **Design** | Hired an external design agency (frog design) |
| $210,000 | **Technology** | Hardware/software:<br>• Initial Software Licensing: $115,000<br>• Hardware: $85,000<br>• Google Search: $10,000 |
| $185,000 | **Content** (consultation) | Hired an external company, Archstone Consulting, to develop the IA and upload content to the online *Reference Center*. (The *Reference Center* replaced the HR and Store Operations print manuals.)<br>"This was probably an expense we could have avoided and handled internally had we known that we were launching in January 2007," says Daidone. "The original plan was to launch by September 2006 but we realized this was an unrealistic timeframe." |
| 0$ | **Content Management** | Leveraged existing system that is used for corporate website: www.barnesandnobleinc.com |

## BACKGROUND

Launched in 1998/99, bninside was the first generation of the Barnes & Noble intranet. Access was given only to corporate users. No access was provided for store employees and its purpose was mostly to service the company's Corporate Communications, HR, and operational needs.

"It was very rudimentary, with an outdated design, confusing architecture, and a homepage that was limited to one feature at a time," says Daidone. "Since the intranet serves as the key online communication channel to our 40,000 booksellers, we recognized that we needed to upgrade the site. The result was Barnes & Noble Inside, which launched in January 2007 with an improved design, architecture, and functionality."

"One of the first things I did when I took over management of the site (in 2003) was to review the list of specifications for previous projects that had been developed for the intranet," says Williams. "Like all similar projects in their early phase, the original site tried to do as much as possible for as many people as possible. In hindsight, it was clear that the mission of the project was becoming clouded and that the nature of the projects being developed for the site were taking more of an operational and reporting focus and were lacking in the information sharing and communications building that had marked the initial release."




Pictured: bninside, the first-generation Barnes & Noble intranet (launched in the late 1900s and replaced in 2007 with the new Barnes & Noble Inside). The early intranet was available only to corporate users.

The site continued to grow and provide additional services, but at times, it seemed to lack a coherent direction. Eventually, it was time to leverage the best of what had been done in years past and rethink the overall site from the ground up.

"The impetus for the redesign was because the previous site was dated, limited in promoting more than one item at a time on the homepage, and lacked much of the functionality that was needed to serve our booksellers," says Daidone.

A team of key organizational stakeholders worked with frog design on the initial design and structure. This team evolved into the Inside Steering Committee in the summer of 2006, which propelled the project forward.

frog design was an active participant in the new site's initial planning and IA. Nearly all of the early design deliverables, including comps, wireframes and HTML/CSS skeletons, were developed by frog, while the Barnes & Noble team made advances in the site architecture and content management frameworks.

The original platform—which had an initial audience of only about 800 users and lacked mission-critical applications—was not specifically designed to provide either scalability or high availability. As part of the redevelopment effort, the team completely overhauled the entire technology stack and server platform.

The original intranet served corporate users only. Its expansion next worked its way to the retail chain managers, and ultimately to every employee. "The assumptions we made in the site's initial requirements changed dramatically as the size of its user base expanded," says Williams. "This was all for the best. When it came time to revisit the effort from the ground up, we were a good deal clearer on what we needed in terms of security, scalability, inclusiveness of the entire Barnes & Noble organization, nature of content, and the willingness to accept feedback from our users and contributors. We had done well with what we had started with, but we knew we could do better. We think we got there and that we have a solid foundation for the future."

## GOALS AND CONSTRAINTS

### Goal: The Need for Speed

The booksellers' physical location—in Barnes & Noble stores—dictates a lot about the site's design. The store environment also dictates the amount of time users reasonably have to interact with the site. "A premium is placed on making the most relevant content as accessible as possible," says Williams.

"Unlike most corporate intranets, where employees visit the site often and for long periods of time," says Daidone, "our booksellers are busy serving customers and need to find daily information fast."

For Barnes & Noble, that means that information presented on Inside needs to be quickly accessible and offer a concise view of what's going on and what's important in the organization. The need for speed also impacts the design and IA. Designing better navigation and search were paramount in tying all of the Barnes & Noble organization's areas together online.

### Goal: Know What *Not* to Put on the Site

The goals were clear going into the redesign: improve the visual design and branding, and redevelop the information model, search, and navigation. And, according to Williams, perhaps one of the most important contributions to the redesign effort was gaining an understanding of what *not* to put on the site.

"Content and functionality that does not reinforce the primary goals of the site can serve to confuse the message," says Williams. "That which Inside does, it does very well."

### Other Goals

Other goals that feed the intranet strategy include:

- Build community among the booksellers by promoting store events, sharing best practices, recognizing exceptional booksellers, and so on
- Inform booksellers of books and products that they should promote
- Serve as a resource for store and personal contact info, HR/benefits info, reference materials, and so on
- Provide quick access to news and information (that is, offer a "five-minute homepage")

The intranet is often referred to within the organization as the "five-minute homepage." Because the primary audience for the site is booksellers working in the stores, providing them with tools and information in a timely manner is paramount to the site's success. "Unlike other companies where employees can devote more time to visiting their intranet," says Williams, "our booksellers are dedicated to serving customers and don't have the luxury of surfing the intranet."

### Constraint: Work Environment

While the booksellers' work environment provides clear goals for the site, these conditions also served as design constraints. The limited browsing environment available in the stores dictates that the site offers no audio/video and no links to external sites.

"Logistics, security, and expense make it unfeasible to perpetually roll out a new information systems platform to the field," says Williams. "Thus, we need to design, develop, and test for the least common denominator."

### Other Constraints

Other constraints were schedule- and content-related. According to Daidone, "Most of the constraints were time-based. The Inside Steering Committee was formed in the summer of 2006 to bring structure to the re-launch process, which entailed migration of some content from the old site, the creation of content for the new sections, and the development of various tools such as the *Store Directory*."

Williams agrees that time was a significant constraint. "Placing a ceiling and managing the initial requirements was a complex effort that took the skills and dedication of many people to complete," he says. "From a technology perspective, we had the challenge of swapping out the new site in place of the old one—'on the run,' as it were. Legacy assumptions down to the level of specific IP addresses prevented us from simply redirecting or swapping out URLs. That was a big challenge."

## USERS

The intranet serves as the key online communication channel to Barnes & Noble's 40,000 booksellers across the country. This includes store managers, department managers, field employees (regional and district managers), and corporate staff.

The site supports a variety of tasks, including daily assignments for store booksellers and access to critical management reports and tools.

Inside is the only channel at Barnes & Noble that is designed for and capable of reaching all members of the organization in a timely manner.

## USER TASKS

Booksellers have quick access to a wide range of tools and information sources directly from Inside's homepage. Users can do the following:

- View daily *Store Alerts* (which provide task-oriented information for operating the store)
- Read daily news, features, and reference information
- Look up store and contact information
- Correspond directly with the CEO via his *Bookselling Matters* blog
- Enter time
- Access HR tools
- Order supplies
- View a wide range of reports (sales, activity, and so on)

## BASIC INTRANET FEATURES

### A CEO blog (*Bookselling Matters*)

CEO Steve Riggio writes a weekly column on topics ranging from strategy to operations to a book or CD that he's passionate about. He uses an administrative tool that the team developed so he can review and respond to comments from booksellers himself. This popular feature attracts readers from all areas of the organization and speaks to issues that impact all of the booksellers.

### *Store Alerts*

*Store Alerts* is the site's most heavily trafficked area. It enables the corporate office to issue daily tasks and information to the booksellers related to topics ranging from how to better merchandise a product to how to remove defective or discontinued items.

### *In the News*

The site publishes references to Barnes & Noble in the news media on a daily basis.

### *Store Directory*

A robust directory tool enables browsing for stores by geographic parameters (state or district location) as well as across organizational boundaries (store/district/region numbers) and by the names of key individuals (such as store managers).

### *Whom to Call*

Targeted to booksellers, this tool lets users search for corporate employees, vendors, and other key contacts.

### *Resource Center*

A secure site on Barnes & Noble Inside accessible by managers and corporate users to view sales and payroll reports, HR tools, and other resources of a sensitive nature.

### Multiple Article Streams

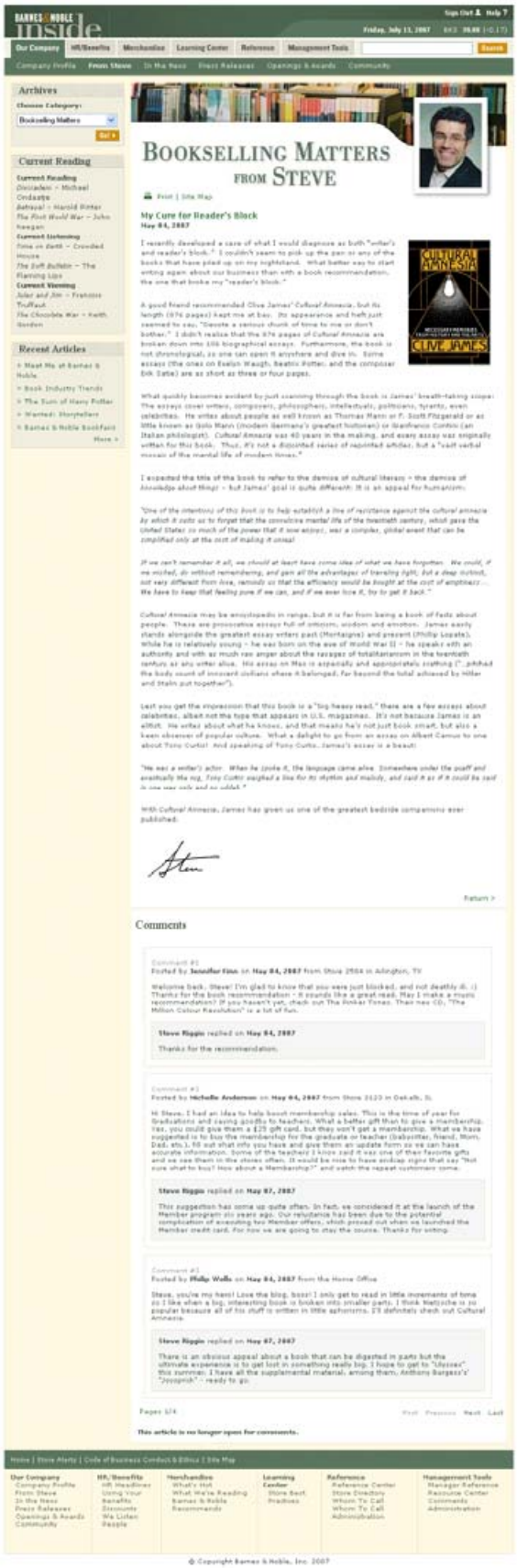
The site is designed to function as an aggregation of smaller "mini-sites," providing a framework for structure and contribution while allowing groups to customize their sections based on their particular Web publishing needs.

### Syndication

Article streams, *Store Alerts*, and news references are aggregated into a series of RSS feeds that are available to corporate users.

### Visual Themes

To visually support the branding and advertising initiatives taking place in the field, the team added functionality that lets site administrators change the site's theme or skin to align with other internal and external marketing initiatives.


BOOKSELLING MATTERS
FROM STEVE
My Cure for Reader's Block
Comments

Pictured: CEO Steve Riggio publishes a weekly blog on the intranet. This popular feature attracts readers from all areas of the organization.

BARNES&NOBLE inside

Sign Out Help ?

Friday, July 13, 2007 BKS 38.97 (-0.28)

Our Company | HR/Benefits | Merchandise | Learning Center | Reference | Management Tools | Search

Manager Reference | Resource Center | Comments Administration

Archives

Choose Category: All Go!

## Comments Administration

Print | Site Map

Pending | Approved | Not Approved

| Comment/Response | From | Date | |
|---|---|---|---|
| **Comment:** Steve, It sounds like you hit a hot topic with the Harry Potter article. I have always loved kids b... **Response:** The amazing thing about the appeal of the Harry Potter series is the number of adults who have read ... | Kat Shulman, Store 2750 in Bethesda, MD | 7/3/2007 11:44:29 AM | Details |
| **Comment:** I don't really see why these columnists care so much. I am sure B&N would still be here regardl... **Response:** Journalists, bloggers, critics: a sea of opinion that is getting bigger every day. I say this new m... | Patrick O'Donnell, Store 2600 in Jacksonville, FL | 7/3/2007 2:59:16 PM | Details |
| **Comment:** Sorry! I think I "submitted" this before I was finished!--"...to say anything to them... **Response:** This is the world we live in, where opinions are cast out without much thought, reflection or FACT C... | Ira Paris, Store 1979 in New York, NY | 7/4/2007 11:26:04 AM | Details |
| **Comment:** While we're on the Harry Potter subject, I've got a question about our Midnight Magic Parties. We're... **Response:** We are going to sell two million books whatever we do. | Jeffrey Beane, Store 2724 in Youngstown, OH | 7/5/2007 11:16:51 AM | Details |
| **Comment:** What is Barnes and Noble planning to do about capturing the younger customers for our music departme... **Response:** We intentionally set out to create a music department that appealed to an older demographic. I don'... | Lyndsay Johnson, Store 2722 in Crestwood, MO | 7/12/2007 10:31:36 AM | Details |
| **Comment:** I agree with the emphasis on regional areas. "My Barnes and Noble" is a statement I think... **Response:** You can call it heavy handed or realize that someone has to make the calls. I don't want to give st... | Susan Prestwood, Store 2514 in Edina, MN | 7/12/2007 10:45:05 AM | Details |
| **Comment:** First, is there a website where one can view the 2007 Book Industry Trends report you referred to? S... **Response:** The BISG report is not free. Our major strategic and tactical decisions are made for the long-term,... | Duane Brienen, Store 2778 in Peoria, IL | 7/12/2007 10:45:43 AM | Details |
| **Comment:** For several years in a row, my old Barnes and Noble (where I worked before this one) has been dubbed... **Response:** We have actually had some weddings performed in our stores. Booklovers Meet, Unite! Maybe Nora Ephr... | Jaime Karpovich, Store 2210 in Easton, PA | 7/12/2007 10:54:38 AM | Details |

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**Learning Center**
Store Best Practices

**Reference**
Reference Center
Store Directory
Whom To Call
Whom To Call Administration

**Management Tools**
Manager Reference
Resource Center
Comments Administration

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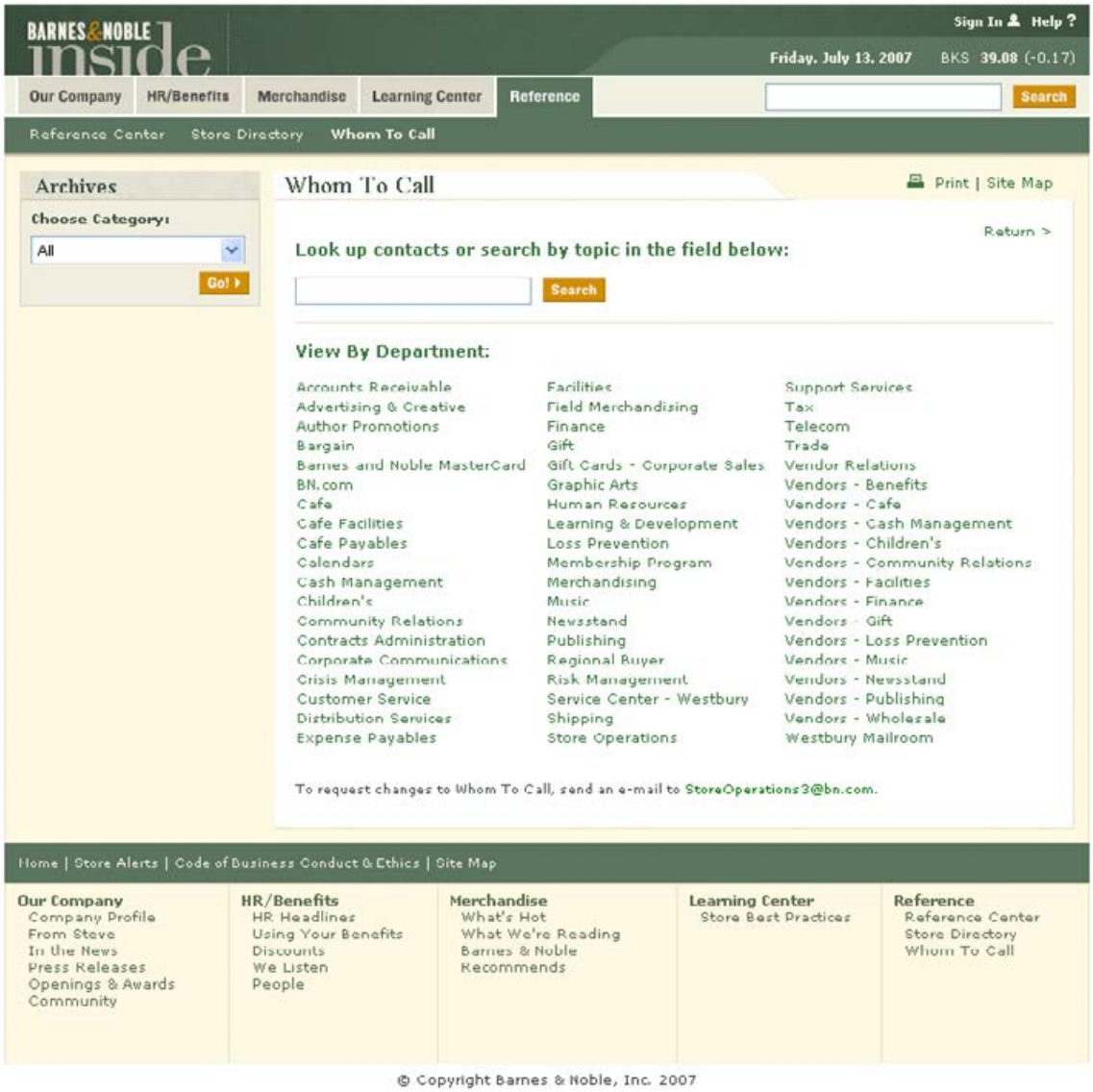
Pictured: The intranet team developed an admin tool so that CEO Steve Riggio can respond directly to reader comments on his weekly blog entries.




Pictured: The *Whom To Call* search tool lets booksellers search for corporate employees, vendors, and other key contacts.

## OTHER KEY FEATURES

### Community Building

Although Barnes & Noble hasn't incorporated any formal collaboration or knowledge management features into the intranet, its CEO blog *Bookselling Matters* successfully connects corporate management with booksellers.

Another community feature that helps the booksellers connect with one another and share information is the *Featured Events* section. Community Relations managers submit items to promote their individual store's events, such as author signings, musical performances, and children's story times. Booksellers can also submit best

practices and reviews of books they are reading, which are then published as articles on the site.

BARNES & NOBLE inside

Sign In | Help ?

Friday, July 13, 2007 BKS 39.22 (+0.65)

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"Live at Lincoln" Series Celebrates Tony Awards

**Archives**

Choose Category:

All

Go!

## Featured Events

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### "Live at Lincoln" Series Celebrates Tony Awards

**June 13, 2007**

Last week, **Store 2028** celebrated the Tony Awards, hosting three events as part of its "Live at Lincoln" series. The events featured Tony Award winners and nominees from various Broadway hits. **Bart Greenberg**, of the Community Relations Department, comments, "Our customers were thrilled with this series of events. They came out in huge numbers to give an enthusiastic reception to everyone from Audra McDonald to Leslie Uggams to John Glover."

The first event was held on Tuesday, June 5, with Tony winners and 2007 nominees Audra McDonald and John Cullum, of the Broadway revival *110 In the Shade*. Several other members of the cast joined them to perform three musical selections from the show. Veteran lyricist Tom Jones also stopped by to sign copies of the new cast recording.

On Thursday, June 7, Director of Author Promotions and Special Events **Steven Sorrentino** sat down for an on-stage theater chat with Tony-winning producer Stewart Lane (*Thoroughly Modern Millie*, *The Will Rogers Follies*, and *La Cage aux Folles*). Tony-winner Leslie Uggams, Tony-nominee Dee Hoty and acclaimed vocalist Julia Budd also performed musical selections. Afterward, they signed books and CDs, including Lane's book *Let's Put on a Show!* This year, Lane won the Tony for *Jay Johnson: The Two and Only*.

Capping off Tony week on Friday, June 8, current and original cast members of the Tony-winning musical *The Drowsy Chaperone* joined the store with guest host and current "Man in Chair," Tony-winner John Glover. The event included performances by Tony winner Beth Leavel, Tony nominee Danny Burstein and television legend JoAnne Worley, followed by a CD signing of the original cast recording. *The Drowsy Chaperone* has won five Tony Awards.

**Photos**: (Top) Audra McDonald of *110 In the Shade*. (Bottom Left) Barnes & Noble's Steven Sorrentino speaks with producer Stewart Lane. (Bottom Right) John Glover, Beth Leavel and Danny Burstein take the stage.

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Barnes & Noble Recommends

**Learning Center**
Store Best Practices

**Reference**
Reference Center
Store Directory
Whom To Call

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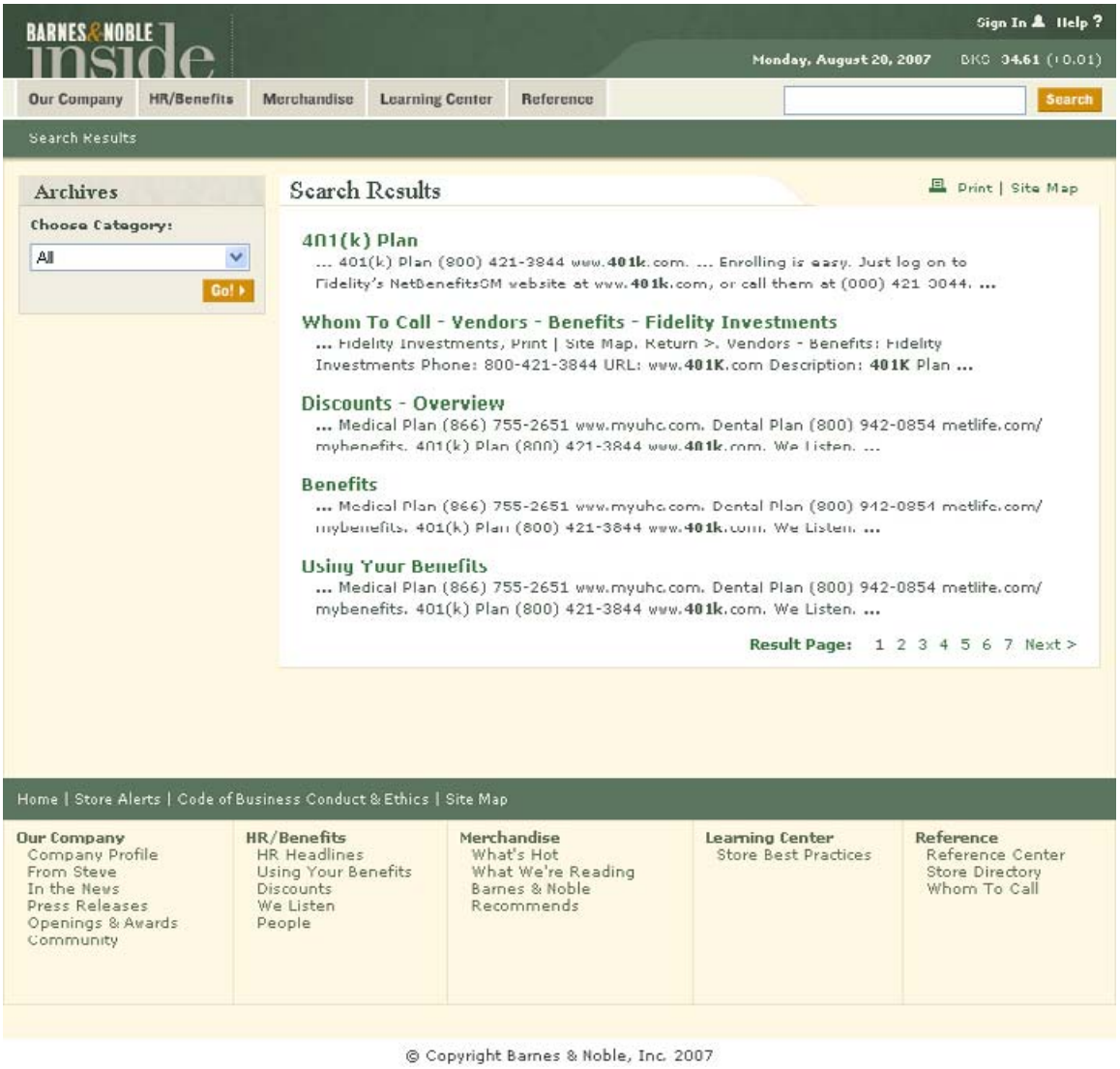
Pictured: The *Featured Events* articles promote the wide range of events held in individual stores, from author visits to musical performances to children's story times.

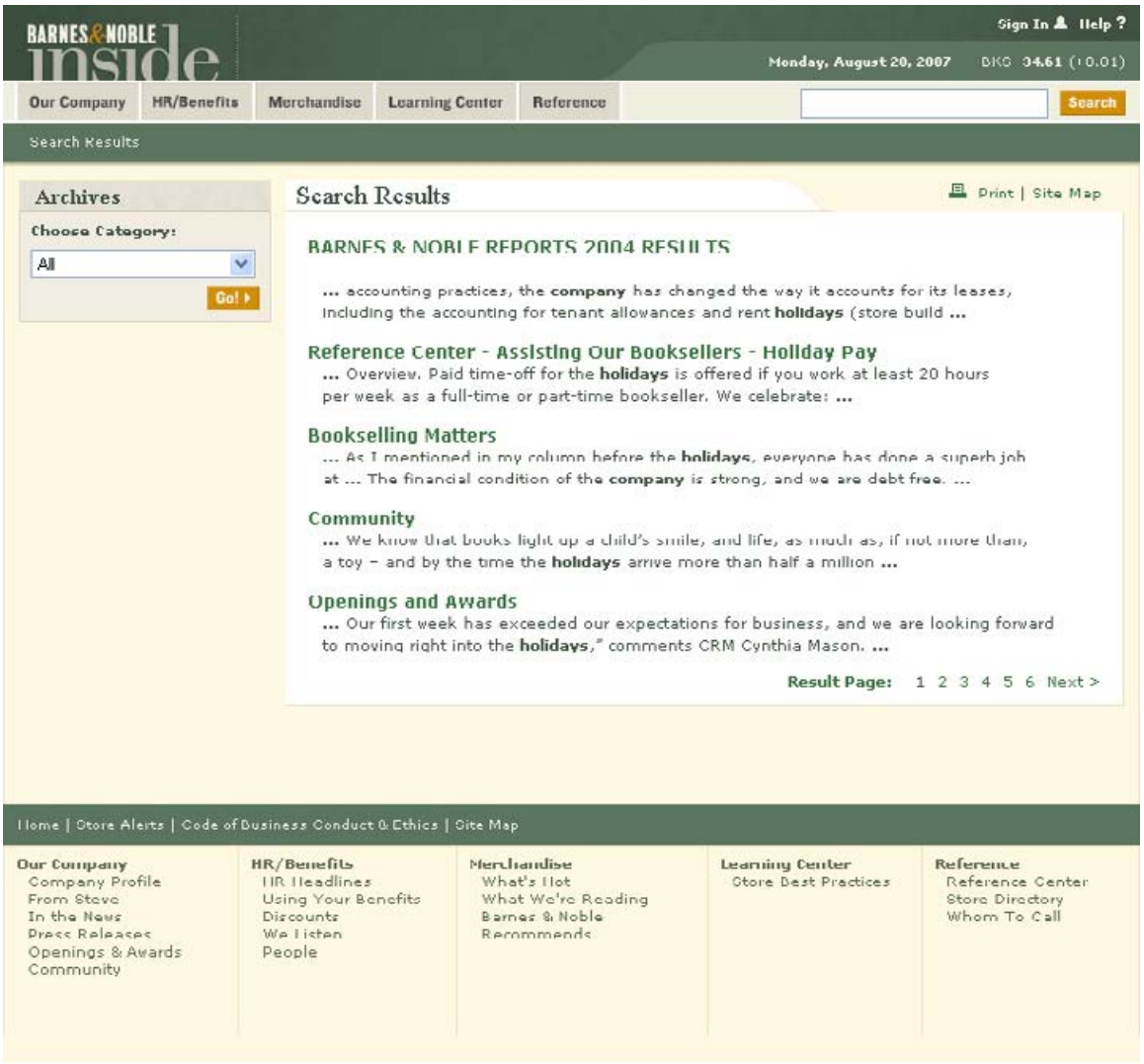
## Search

Like several other companies included in this year's report, Barnes & Noble uses Google (2nd generation) search to provide search engine indexing and functionality to the site.

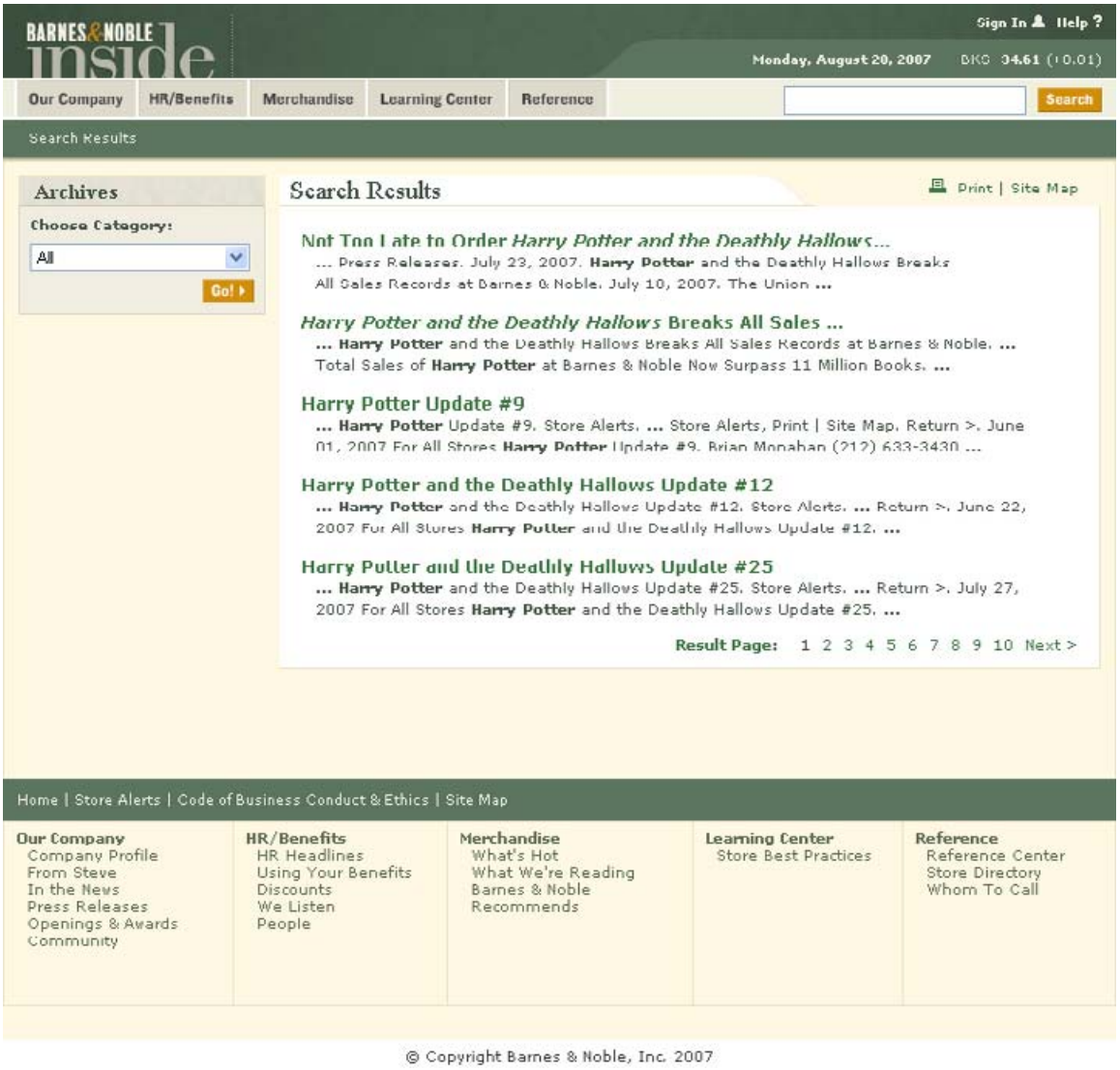
"We have added some custom application code to the site to integrate with the appliances so that the integration is seamless. This is a new platform for us," says Williams. "This required us to optimize the content and pages of the site to be friendly to the indexing appliances. We think the extra effort has been validated and that the results have been well worth it."




Pictured: Search results for "401(k)."




Pictured: Search results for "company holidays."




Pictured: Search results for "Harry Potter."

| Top 100 searches | | |
|---|---|---|
| Search Keywords | Pages | Hits |
| bargain | 215 | 215 |
| music+stepladder | 179 | 179 |
| sales+audit | 101 | 101 |
| newsstand | 95 | 95 |
| cafe | 94 | 94 |
| sparkcharts | 93 | 93 |
| whom+to+call | 92 | 92 |
| music | 86 | 86 |
| spark | 72 | 72 |
| sparknotes | 70 | 70 |
| sales+audit | 62 | 62 |
| thomas+recall | 61 | 61 |
| bad+barcodes | 54 | 54 |
| medallion | 52 | 52 |
| supplies | 50 | 50 |
| bad+barcode | 45 | 45 |
| spark+charts | 41 | 41 |
| clearance | 39 | 39 |
| SPARKNOTES | 39 | 39 |
| pdt | 36 | 36 |
| shelving+guidelines | 36 | 36 |
| SALES+AUDIT | 34 | 34 |
| promotions | 34 | 34 |
| cycle+count | 33 | 33 |
| music+stepladder | 33 | 33 |
| frappuccino | 33 | 33 |
| checkpoint | 32 | 32 |
| sparkchart | 31 | 31 |
| dwm | 30 | 30 |
| stepladder | 30 | 30 |
| institutional | 29 | 29 |
| newspapers | 29 | 29 |
| CAFE | 28 | 28 |
| harry+potter | 28 | 28 |
| NEWSSTAND | 28 | 28 |
| brinco | 28 | 28 |
| calendar | 27 | 27 |
| receiving | 26 | 26 |
| payroll | 25 | 25 |
| thomas | 25 | 25 |
| BARGAIN | 24 | 24 |
| educator | 24 | 24 |
| vacation | 24 | 24 |
| BAD+BARCODES | 24 | 24 |
| public+folders | 24 | 24 |
| gallant | 23 | 23 |
| this+week | 23 | 23 |
| discounts | 23 | 23 |
| WHOM+TO+CALL | 22 | 22 |
| store+directory | 21 | 21 |
| ups | 21 | 21 |
| signs | 20 | 20 |
| newspaper | 20 | 20 |
| frappuccino+contest | 20 | 20 |
| workload | 20 | 20 |
| cashwrap | 20 | 20 |
| recall | 20 | 20 |
| shelving | 20 | 20 |
| SALES+AUDIT | 19 | 19 |
| barcodes | 19 | 19 |
| games | 19 | 19 |
| NEWSPAPER | 19 | 19 |
| bad+bar+codes | 19 | 19 |
| e-planner | 19 | 19 |
| buyer | 19 | 19 |
| ingram | 19 | 19 |
| e-planner | 19 | 19 |
| strict+on+sale | 19 | 19 |
| book+department+music+stepladder | 19 | 19 |
| consolidated | 18 | 18 |
| godiva | 18 | 18 |
| inventory | 18 | 18 |
| small+press | 18 | 18 |
| we+listen | 18 | 18 |
| coupons | 18 | 18 |
| consolidated+vendor | 18 | 18 |
| spark+notes | 18 | 18 |
| tuition | 17 | 17 |
| author | 17 | 17 |
| magic+tree+house | 17 | 17 |
| returns | 17 | 17 |
| ttc | 16 | 16 |
| lighting | 16 | 16 |
| direct+deposit | 16 | 16 |
| shipment | 16 | 16 |
| shelving+guidelines | 16 | 16 |
| gift | 16 | 16 |
| alibris | 16 | 16 |
| alarm | 16 | 16 |
| harry+potter | 16 | 16 |
| choose+your+diet | 16 | 16 |
| loss+prevention | 16 | 16 |
| phone | 16 | 16 |
| trivia+bay | 15 | 15 |
| jones | 15 | 15 |
| employee+discount | 15 | 15 |
| store+mail | 15 | 15 |
| store+mail | 15 | 15 |
| consolidated+vendor+list | 15 | 15 |
| planner | 15 | 15 |

Pictured: Barnes & Noble's Top 100 searches

### Data Visualization

While the site doesn't currently employ any data visualization features, the intranet team is exploring options for data visualization in reporting solutions. "We have become particularly enamored with the possibilities of what we could do with the integration of Sparklines as a visualization tool for the site," says Williams. "We are working on a proof-of-concept project that would integrate these visualizations with Inside and the *Resource Center*."

Williams says he believes that the use of Sparklines will enable the Barnes & Noble management team to review the data for an entire region at a glance. An average Barnes & Noble store carries approximately 250,000 units across 150,000 titles; it's therefore difficult for the management team to examine each store's issues because doing so would entail reviewing hundreds of individual store reports. Williams says that Sparklines could allow the team to view data in smaller, more manageable pieces. "We feel that improving our visualization options can enhance the experience of multiple applications at Barnes & Noble and not just the intranet alone."

## DESIGN PROCESS AND USABILITY ACTIVITIES

### Learning from Past Mistakes

Barnes & Noble's internal team and frog design worked together to develop the site's design requirements. In doing so, they gathered research data from several survey-type initiatives. This research was an effort to find out what end users and stakeholders felt was both good and bad about the current site. They used this data to help them plan the new design.

"Design decisions were made jointly by our external agency—frog design—and our internal stakeholders through an iterative process," says Daidone. "While we didn't conduct any formal usability tests, we do gather information about our systems in numerous ways." These ways include:

- ***Dear BookMaster:*** An emailbox where store managers can suggest enhancements to the BookMaster system; they sometimes offer comments about Barnes & Noble Inside as well.
- ***We Listen*:** A formal program where corporate employees visit with store managers and booksellers annually at approximately 20 sites across the country to solicit feedback on a broad range of topics (including Inside).
- ***Inside Survey:*** The team conducted a comprehensive online survey on Barnes & Noble Inside to solicit feedback.

The team drew design inspiration from a range of outside sources. "Recognizing the goals of the project, inspiration was drawn from community content management systems, popular blogs, and well-constructed news sites," says Williams. "We chose these because such Web properties, by design, are inclusive in tone, easy to use and navigate, and generally modular in construction. We thought these things would mesh well with the new vision for the site."

The team involved key stakeholders as the design evolved. These stakeholders (the Inside Steering Committee) met weekly to review such things as design, content, user interface, and functionality.

The team conducted several usability activities in researching what to include in the new design. These activities included:

- Field study
- Heuristic evaluation (expert review)
- User testing of new design prototypes
- Experience gathered in support of the old intranet
- Server log analysis

"Early analysis had been done purely through field study and experience gathered in support of the original site," says Williams. "Our analysis of the original site had great influence on the architecture of the new Inside. When we were in doubt about how a particular feature or set of functionality might be used, we reviewed our server logs to validate (or sometimes invalidate) commonly accepted perceptions."

In later phases of development, the team relied on user reviews of the design prototypes. Seven iterations of prototypes were reviewed before the team began building the site.

## TIMELINE

The redesign took nearly two years from initial discussions to launch. Key milestones included:

**2005**

- **February:** Initial discussion and kickoff meeting
- **March:** Detailed discussion of strategy and branding
- **June:** Initial design deliverables
- **July:** Detailed user requirements discussion and analysis
- **October:** Formation of development team for implementation
- **December:** Proof of concept implementation and review

**2006**

- **February:** Inside Beta 1 launch
- **April:** Inside Beta 2 launch
- **September:** Content Review and Revision; Inside Beta 3 launch
- **October:** Inside Beta 4 launch
- **November:** Inside Beta 5 launch
- **December:** Final release

**2007**

- **January:** Launch

## RESULTS

According to Daidone, "Barnes & Noble Inside has been extremely well received by our booksellers. They find it easy-to-use and full of helpful information. We average 1 million page views and 170,000 visits monthly—and those numbers are actually larger because booksellers share terminals."

"Interactivity is a key benefit of the new site that wasn't available with the previous site," he says. "Booksellers can 'blog' with our CEO, submit best practices, submit reviews of books, share information about events that took place in their stores, and more. Many of our print manuals have been 'webified' and can be accessed through the *Reference Center* section of the site. And searchable and browsable tools such as our *Store Directory* and *Whom to Call* have simplified the process of finding information about our stores, the people who work there, as well as contacts within the corporate office."

### User Feedback

The following are examples of comments made by users since the new intranet site launched:

> "First of all, I would just like to tell you how much I enjoy the new look of Barnes & Noble Inside and especially the blog. It's great to see that some of the questions others are asking are questions the rest of us have."—*Bookseller*
>
> "Steve's column is the best thing to happen to company communications in the entire 11 years I've been here. It shrinks the divide between remote stores and the corporate entity and lets all of us have our finger on the pulse of our company strategy."—*Store Manager*
>
> "Having the stock price on Inside is wonderful. It has created a great buzz in the store as to how the company does as a whole and how news affects us."—B*ookseller*
>
> "It's a really big deal to see our store mentioned on the site—our booksellers love it!"—*Community Relations Manager*
>
> "Our store is thrilled to be a part of Inside's 'Midnight Magic' party recap, and being placed as the lead story is icing on the (wedding) cake for us." (Note: This comment refers to a feature on the store's Harry Potter party, where a newly married couple was the first recipient of the latest book in the series.)—*Community Relations Manager*
>
> "Stores have a tendency to be less isolated with Barnes & Noble Inside."—*Department Manager*

## LESSONS LEARNED

**Lessons learned from Thomas Williams:**

> **Content is a site's most valuable asset.** "Do not underestimate its value or the amount of time it will take to organize it, manage it, and enable it for the Web. Focus your efforts on making the content easy to search and navigate. Even the best branding and widgetry cannot make information without value come to life, especially on a site designed for frequent visits from its user base."
>
> **Keep the information and functionality coming.** "Do not let the site atrophy from a lack of updates. Get feedback from your users and check their habits through Web and search logs. Use them to help determine the next best step for the site."
>
> **Prototype and review regularly.** "Prototype and review often with the members of your organization most impacted by the success of the site.

Distinguish between those that are interested in the project and those that are committed to the project."

**Know what *not* to do.** "Keep the vision focused and be careful of adding features that might adversely impact the stability of the site. You cannot serve to your audience what you cannot keep up and running."

# IKEA North America Services, LLC

**Using the intranet:**

Since its founding in Sweden in 1943, IKEA has offered a wide range of home furnishings of good design and function at low prices. IKEA has a strong company culture that puts an emphasis on smart solutions, togetherness, being socially responsible, and creating good results from small means. IKEA has operated in the US since 1985. The IKEA USA Intranet is part of the IKEA Intranet and is designed, developed, and managed by a small group of in-house co-workers in the US Internal Information Department.

**Headquarters:** Conshohocken, Pennsylvania (US)

**Number of employees the intranet supports:** 12,000

**Locations:** One service office and 33 store locations within the US

**Sales:** not available

**Design team:**

In-house, by four staff members supplemented (very occasionally) by freelance writers and designers

**Members:**

Beth Gleba, US Internal Information Manager; Karla Shafer, US Intranet Web Editor; Brian Wasson, US HR Communicator; Luz Morales, Intranet Writer

## SUMMARY

The small IKEA US intranet team worked hard under strict budgetary constraints and some (albeit good) design dictations from above. They turned what could have been an unconstructive situation into one that fosters collaboration and communication. Many small touches add up to one major upbeat success in the IKEA US intranet.

The IKEA US intranet supports IKEA North America Services, LLC, and is an important part of the main Global IKEA intranet. Each country represented at IKEA has their own intranet site for communicating local information, such as benefits, sales reports, and training schedules. As the “main” intranet, Global IKEA, is responsible for information that applies to all locations, such as product information, merchandising guidelines, and business strategies.

IKEA US and other local intranets follow the templates and style sheet established by Global IKEA. While Global IKEA is very hands off in terms of dictating what local sites publish, the relationship between the US and global intranets is collaborative.

The US intranet, also referred to as *US Retail Inside,* serves 12,000 IKEA employees at 33 retail locations across the US. The majority of site users are managers in some capacity, such as store managers, assistant store managers, business navigators (known as “controllers” in other companies), customer service managers, HR managers, logistics managers, sales managers, system trainers, cash office managers, interior design managers, and IKEA food service managers. Many users—65-75% of them—get their information via kiosks right out on the sales floor.

And, as users access the intranet, they can get important information right on the homepage, which is uncluttered and offers compartmentalized information in well-marked sections. On the left side is a section dedicated to home furnishings, IKEA’s business. The *Home Furnishings Focus* section links to information about upcoming sales and promotions. It also links to the US marketing department site. Having

these links and dates right on the homepage helps managers keep well aware of events and promotions they should be running (or at least aware of)).

Pictured: Many users access the intranet from kiosks in employee cafes that are right on the sales floors.

The *What's Happening Now* section in the center of the homepage showcases an article about the business, such as what IKEA employees can do to learn even more about their customers and to share knowledge with other departments around the organization.

The *Quick Links* section on the right helps users to hit some of the most popular intranet sections. Only sections of interest to all employees make this list, such as *online payroll* and *HR Benefits.* Designers considered the top 10 places that users went to from the homepage and made sure they were represented. The link choices were also informed by user feedback and information from the Internal Information department.

A byproduct of the design is that clustering similar tools and links together saves space on the homepage. In previous designs, the homepage was too long and required too much scrolling.

Also, under the *Quick Links* area is a link to *Future Stores/Expansions.* Clicking the drop-down opens a list of locations where stores will be opening or expanding. The organization plans to open five new stores each year—huge growth, considering there are currently only 33 US stores. The 12,000 US co-workers, as well as many others working around the world, find these store openings to be thrilling. Moreover, many of them are proud to be a part of the excitement.

Pictured: The homepage's *Future Stores/Expansions* list links to some of the intranet's most popular pages, where users can see progress for store openings and news about recently opened stores.

To help each and every employee share in the excitement, the intranet offers both *Build-Up* sites, which share photos and notes about the progress of coming stores, and *Store Opening* coverage when the event actually occurs. These are some of the most popular pages on the intranet.

Pictured: A *Store Opening* page shows pictures of the new store, people at the opening, and other event highlights.

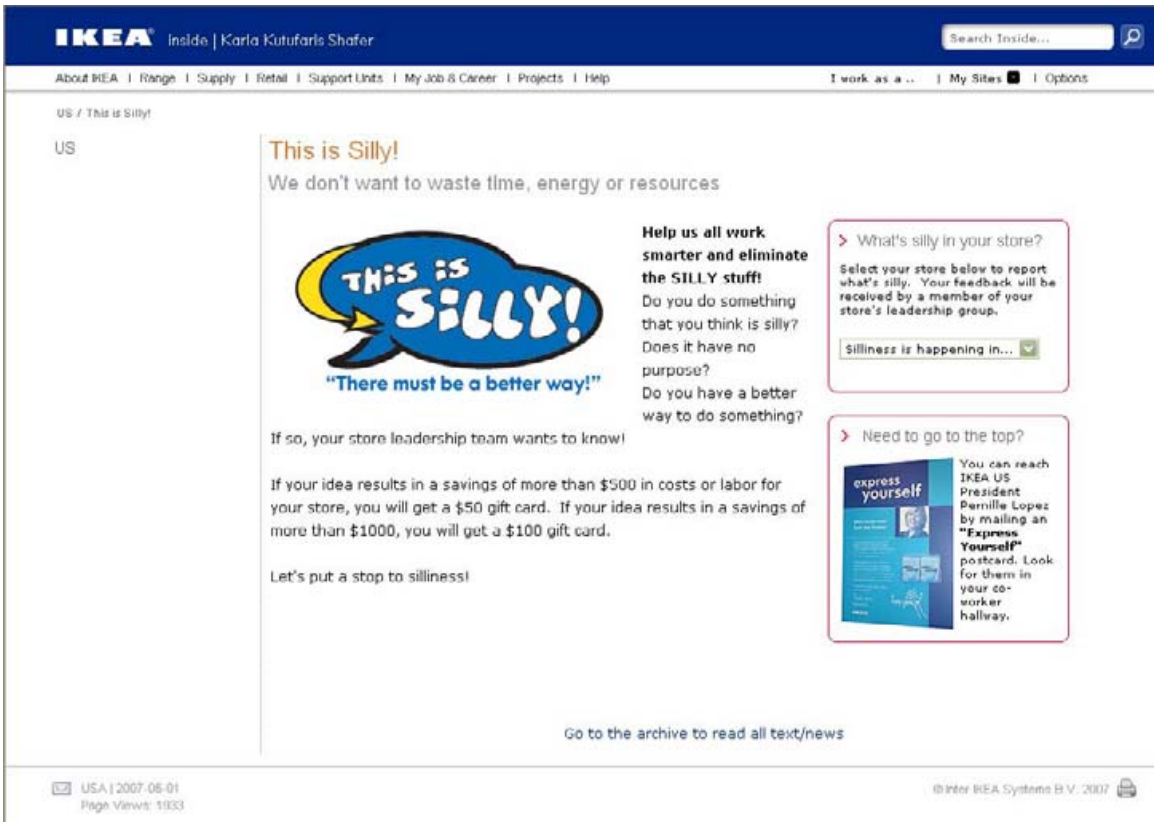
The purpose of the *IKEA People* section in the homepage's lower left area is to show that IKEA is a community. With so many stores in the US alone, keeping people connected is essential if they are to understand and learn from each other. Some topics that have been showcased in this section include co-worker stories; HR news,

such as “Time to sign up for an FSA”; and notification of special perks and benefits available to IKEA employees.

Designers and managers also feel it’s important that employees know the state of their company. Every Monday morning, the Web Editor takes numbers generated by the Finance department and posts them in the *Sales Update/Goals* section in the homepage’s lower middle section. At a glance, users can see a table displaying the percent of sales goals met for the prior week, as well as for the year to date. They can also see the percentage of store-visitors goals met for the prior week and year to date. If users are interested in daily sales, they can download an Excel spreadsheet or compressed zip file with this detailed information. Most employees have selling as part of their core job, and seeing how well they are doing can be gratifying and motivating.

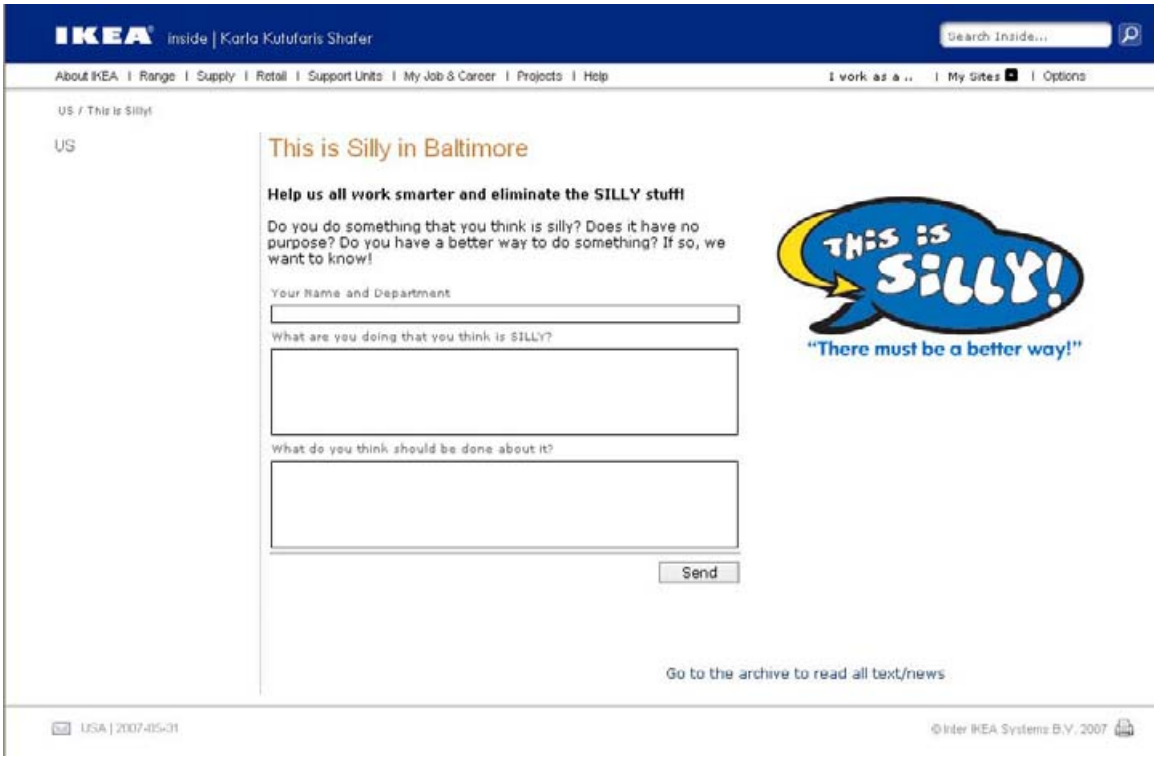
The *Search&Find* section in the lower right offers various capabilities for searching the site and other parts of the intranet. Also, some of the more popular links are posted here. The idea is that, if many people have found the link important, then still more people will be looking for it—or at least interested in it if it’s presented to them. Note that there is also a simple site search (an open field in the upper right), were users typically go to do a straightforward intranet search.

One of many features that support the organization’s casual and fun culture is the *This is silly!* feature, which users link to via the left-side navigation. This is basically an online suggestion box. A page encourages these suggestions, describes where the comments go, and outlines the possible rewards submitters might receive; it also instructs submitters to indicate the store location where they work.



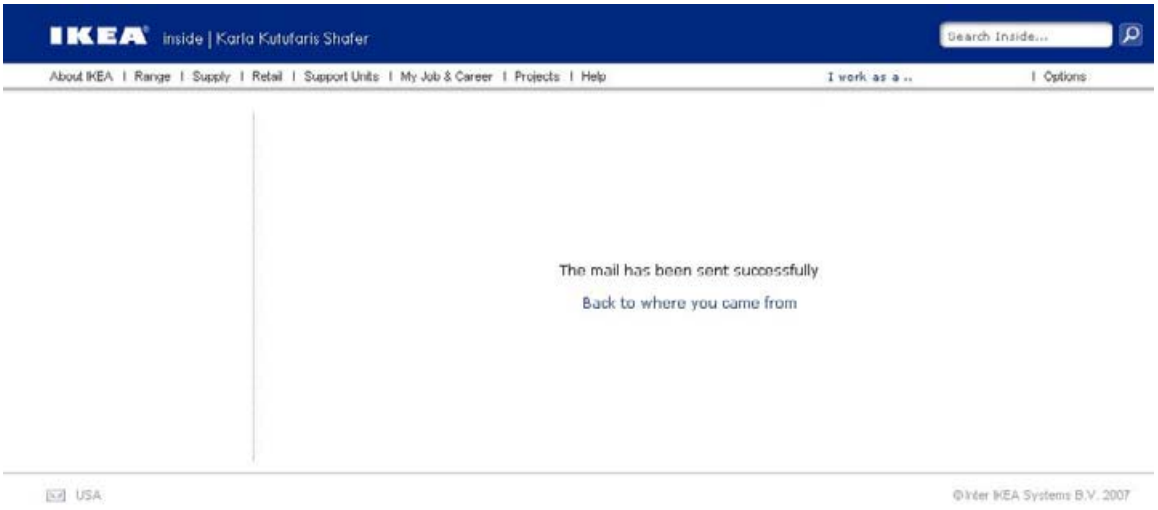

Pictured: The fun writing style encourages users to submit comments and suggestions.

Once users choose their store, they can fill out the form about what they find "silly." The form is very simple, requesting the user's name, department, what they feel is silly, and how they suggest changing it.




Pictured: A simple form lets users describe what they feel is not working well at their store and how they suggest fixing it.

Once users send the form, the intranet presents a *Thanks for the feedback* message. Just after this, a confirmation message informs the user that the email has been sent successfully (see below). From there, the store's management team responds to the individual.




Pictured: Users are notified when their messages are sent.

Pictured: The IKEA US retail intranet homepage offers current information about sales promotions, sales goals met, and news, plus information about people.

Some intranet teams procrastinate and complain about low budgets and the need to patiently wait to acquire and implement new technology. The IKEA team is nothing like this. Instead, the team members make the most of what they have with an eye toward more improvements in the future. This is a sign of an unquestionably great team.

The IKEA intranet team is using their in-house content management tool, but is in the process of implementing portal technology. To smooth the transition, the team has created a series of role-based pages that mimic how they envision the role-based portal pages working. This is like training wheels for portal design and personalization. It helps the designers get a jumpstart on determining necessary profiles for personalization, and could help acclimate users to the idea so they're not shocked when the new portal design launches. And, continually researching users' responses now will help the team avoid future pitfalls.

The US IKEA designers call these role-based pages *Dashboard* pages. They've created dashboards for store roles that represent about one-fourth of employee population, totaling approximately 3,000 employees served by the *Dashboards*.

Those roles include:

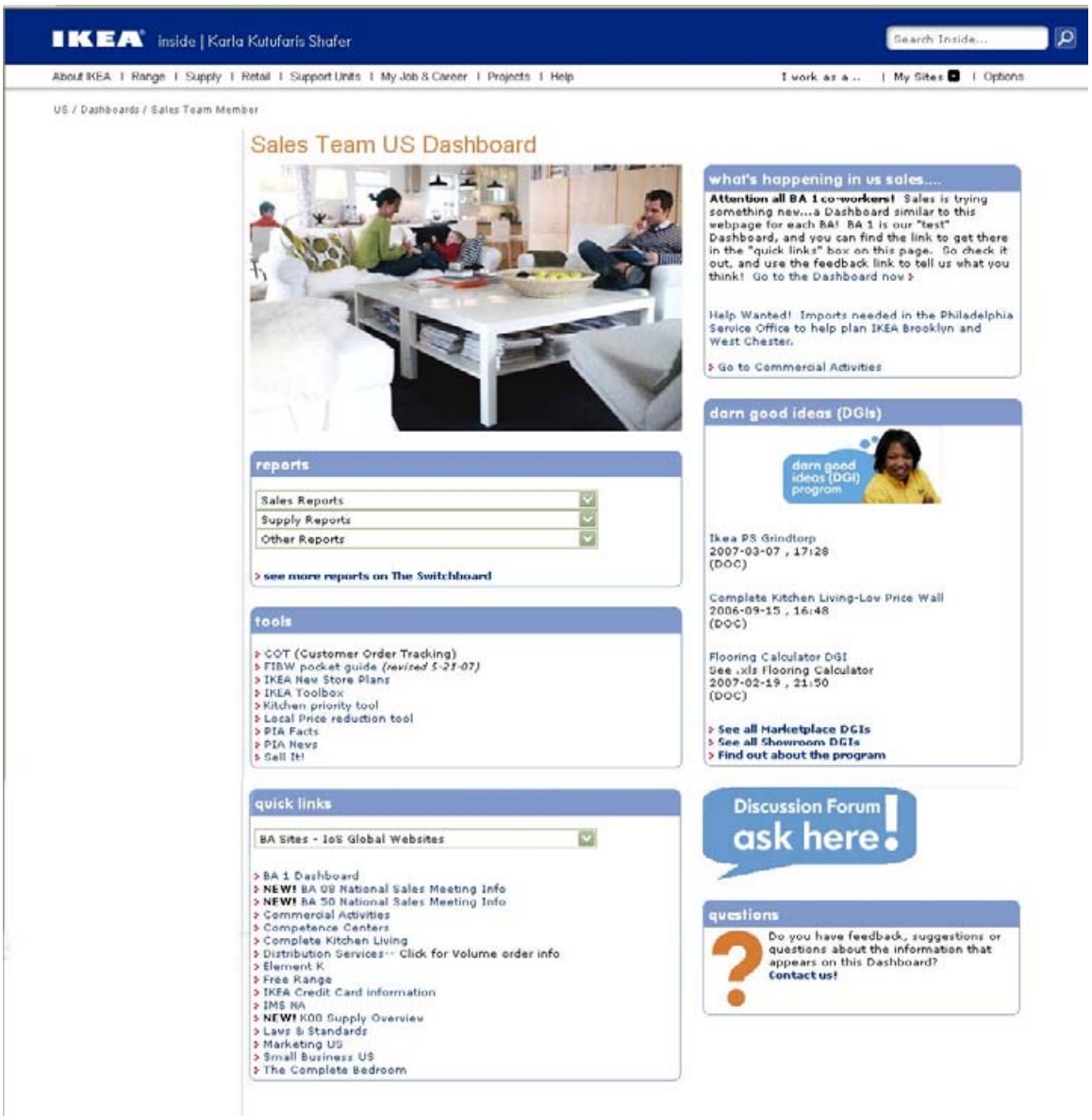
- Store Manager
- Assistant Store Manager of Services
- Business Navigator (IKEA's name for the Store Controller)

- Sales Team Member
- Cash Office Team Member
- Customer Service Member
- HR Team Member
- Food Service Member
- Logistics Member
- Recovery Member
- Systems Trainer

*Dashboards* is visible and easily clickable from a homepage drop-down list in the *QuickLinks* area.

Pictured: Users can easily access role-based pages via *Dashboards* in the homepage's *QuickLinks* area.

The actual dashboard pages house information that users on that team or those interested in that area need. For example, the *Sales Dashboard* offers links to sales reports, news, and *Darn Good Ideas* (submitted from co-workers across the business), plus a link to the discussion forum. A clear image of actual salespeople at work enlivens the page.




Pictured: The *Sales Dashboard* informs and connects people at IKEA as they help each other improve their sales skills and sell more products and services.

Supporting the organization, instilling excitement, and working well with the tools and resources at hand epitomizes the IKEA US intranet team. Nice going, guys and gals!

## URL AND ACCESS

The URL of the IKEA USA intranet is: http://iwww.usa.namerica2.ikea.com. The site, US Retail Inside, is the start page on every computer in all US IKEA stores.

Because most IKEA co-workers don't use a desktop computer in their job functions (unless their in management), 65-75% of users access US Retail Inside on computer terminals located in each store department, the staff cafeteria, and the Resource Room (a library with training material and other IKEA information).

Dial-up access is available only to IKEA managers on IKEA-issued laptops so they can access the intranet when away from the office.

## TECHNOLOGY

The intranet's technology platform is provided by the Global IKEA intranet team, which developed the platform for the company's global intranet site. Co-workers on other countries' intranets (such as the US) don't have much interaction with or knowledge of the technology's inner workings.

## CONTENT MANAGEMENT SYSTEM

### CMS Platform

The CMS, like much of the US intranet's technology, is the same as that developed by the global team for the global intranet. An in-house design team based at IKEA headquarters in Helsingborg, Sweden, designs the (global) IKEA intranet templates and content management tools used by the US site.

This global team dictates the design guidelines, standards, and templates and maintains the intranet style sheet. The global team also manages intranet applications like the Web survey tool, course booking tool (which lets users sign up for training classes), search tool, and conference room booking tool.

### CMS Authoring

Each country in the IKEA world owns its own intranet section for local publishing. On the US site, approximately 50 different publishers add content to the site. These "Infomasters" are subject matter experts in their various departments across the organization (such as Sales, Marketing, and HR) and update and edit their own content.

"Having this many publishers adding content to a site can be a challenge to consistency," admits Karla Shafer, IKEA US Intranet Editor. "Some aren't aware of the intranet guidelines; others just like to put their own stamp on things. Getting our publishers up to the same competency level is definitely an opportunity for us!"

"Within IKEA, intranet publishing is something that is done in addition to a publisher's other responsibilities," she says. "We have some areas of our intranet that are top-notch—timely, relevant information, all links working, looks nice and organized—and others that could be better. But the reality is that a co-worker in the store doesn't know we use a CMS and doesn't care. If they always visit a site and the information is out of date, their perception is that the entire intranet isn't credible. So, one site's weakness can really affect us all!"

Infomasters have access to Global IKEA's *IKEA Intranet Design Manual*, but Shafer says this document is very comprehensive and users often don't have the time (or inclination) to work with it. "So, as the US Intranet Editor, it's my job to know all the design guidelines and pass along what Infomasters need to know," she says.

Given the number of Infomasters and the small amount of time each has to devote to content maintenance, Shafer and her team have taken steps to ensure consistency across the US site:

1. Identify a need to publish certain information
2. Determine an "Infomaster" who is responsible for maintaining the information

3. Decide the information's placement on the intranet by answering the question: "Who in the store will need this info?"
4. Create a new page if necessary (the US Intranet Editor does this)
5. Train the Infomaster to update and maintain the new page
6. Conduct site audits each year to assess a site's health and determine what (if any) actions should be taken

"As US Intranet Editor," she says. "I try to teach and instruct Infomasters as much as possible to take care of their own sites. I think this is empowering and really gives people a sense of ownership. However, I have been known to 'step in' if I see something that is really wrong and needs immediate attention."

## INTRANET TEAM

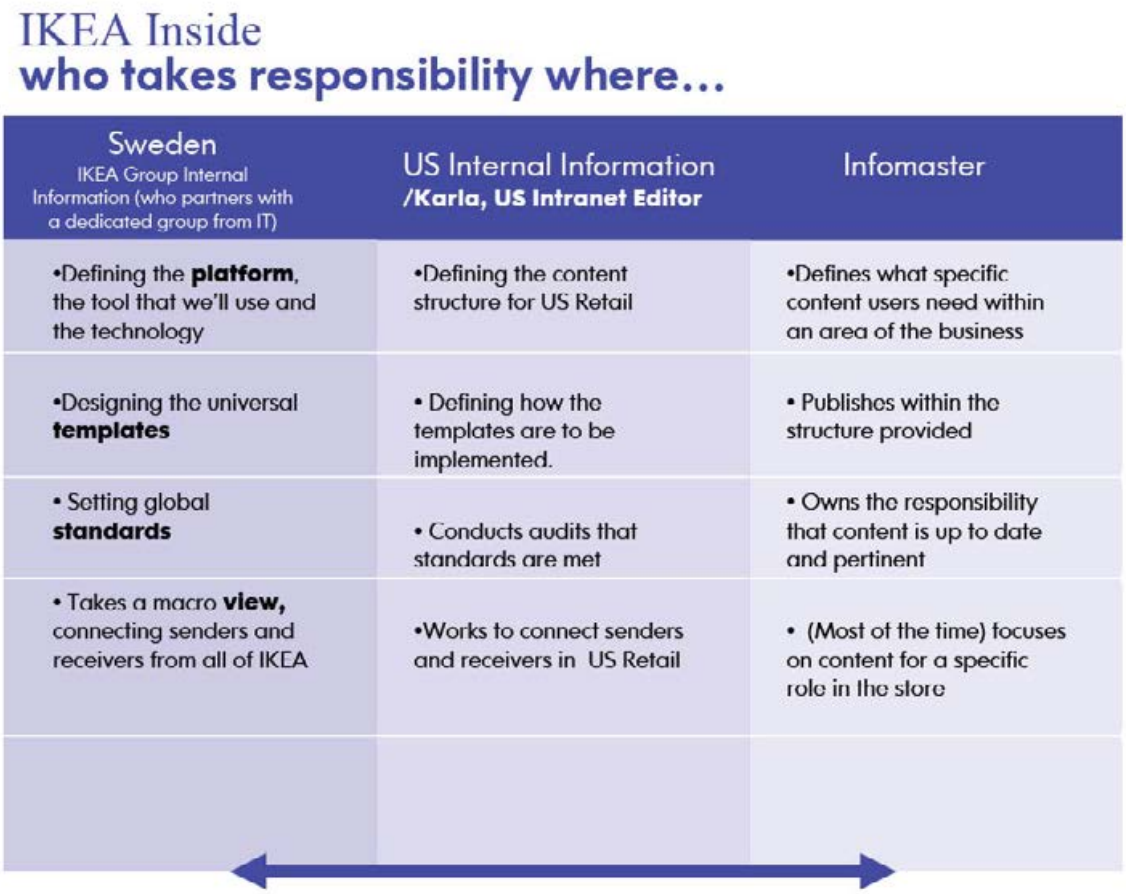
Pictured (from left): Brian Wasson, HR Communicator; Beth Gleba, Internal Information Manager; Karla Shafer, Intranet Web Editor; and Luz Morales, Intranet Writer.

"At IKEA we say, 'you do a little, we do a little, together we save a lot," says Gleba. "It's not just a maxim for our shoppers who save as they buy flat-packed furniture; it's also deeply rooted in how we work."

That credo of working together is strongly at play in the way the US intranet works within the corporate IKEA structure.

Global IKEA is responsible for all information that applies to every country throughout the IKEA world. Such information includes product information, merchandising guidelines, and business strategies.

Each country within the IKEA world has its own intranet site for local issues, such as benefits information, sales reports, and training schedules. The IKEA US intranet site works within the templates and style sheet that IKEA Global puts in place—but, according to Shafer, Global IKEA is very "hands off" when it comes to what or how the local sites publish. "The relationship between the US and global is quite collaborative," she says, "with ideas bouncing back and forth quite often."




Pictured: This chart illustrates the distribution of roles and responsibilities between Global IKEA and the US intranet, and outlines the various publishing roles.

US Internal Information, a (four-person) team that resides in the US Corporate Communications Department, owns the US intranet. The site is designed, developed, and managed by the small group of co-workers: Beth Gleba, Internal Information Manager; Karla Shafer, Intranet Web Editor; Brian Wasson, HR Communicator; and Luz Morales, Intranet Writer.

## BUDGET

The team has an annual budget of less than $5,000. Shafer says it's spent mostly on freelance writing and some design work, as needed. "Our intranet budget is as lean as our staffing," she says.

## BACKGROUND

The organization using this US intranet is the IKEA US Retail Organization, which includes a service office and 33 store locations across the US.

In the mid-1990s, development of the US IKEA intranet followed a pattern similar to that of many sites on the (then) burgeoning World Wide Web: it all started with a developer who had a good idea.

An IT co-worker with a passion for technology decided that creating an intranet would be "a cool way for people to get information," says Gleba. "Using Notepad, and later Home Site, he published 'fun' things at first with his friends in the corporate office in mind: travel tips, a moving weather map, the daily Dilbert cartoon." Back then, the site existed as a classic Web-master-published site with a hodge-podge of features and, according to Gleba, it took the company a while before people began to realize: "Hey, we can use this for business!"

By 2000, the site consisted of about 800 pages. At about that point, the US Sales group began to use the site to publish sales reports. That was the "Eureka!" moment for the organization. Publishing content (online) so other locations could quickly access it as needed demonstrated to the broader organization the value of the site. The site continued to grow; by 2001, it had expanded to a little over 1,000 pages. A newly formed US Internal Information Department then took over its management.

"It was clear to us that if we were going to continue to grow we needed to change our setup, moving from the classic Web master bottleneck to a shared way of publishing content," says Gleba. And, in 2002, that's just what they did. The US site began using a Global-IKEA-produced content management tool, called Information Publisher.

"It's a home-grown tool that allows us to setup structures and permit co-workers with no Web experience to publish online," Gleba says. Those publishers are the Infomasters.

By 2004, the team managing the site had begun to think of it as a portal and considered transitioning the site to a new publishing platform, but the timing wasn't right for the change.

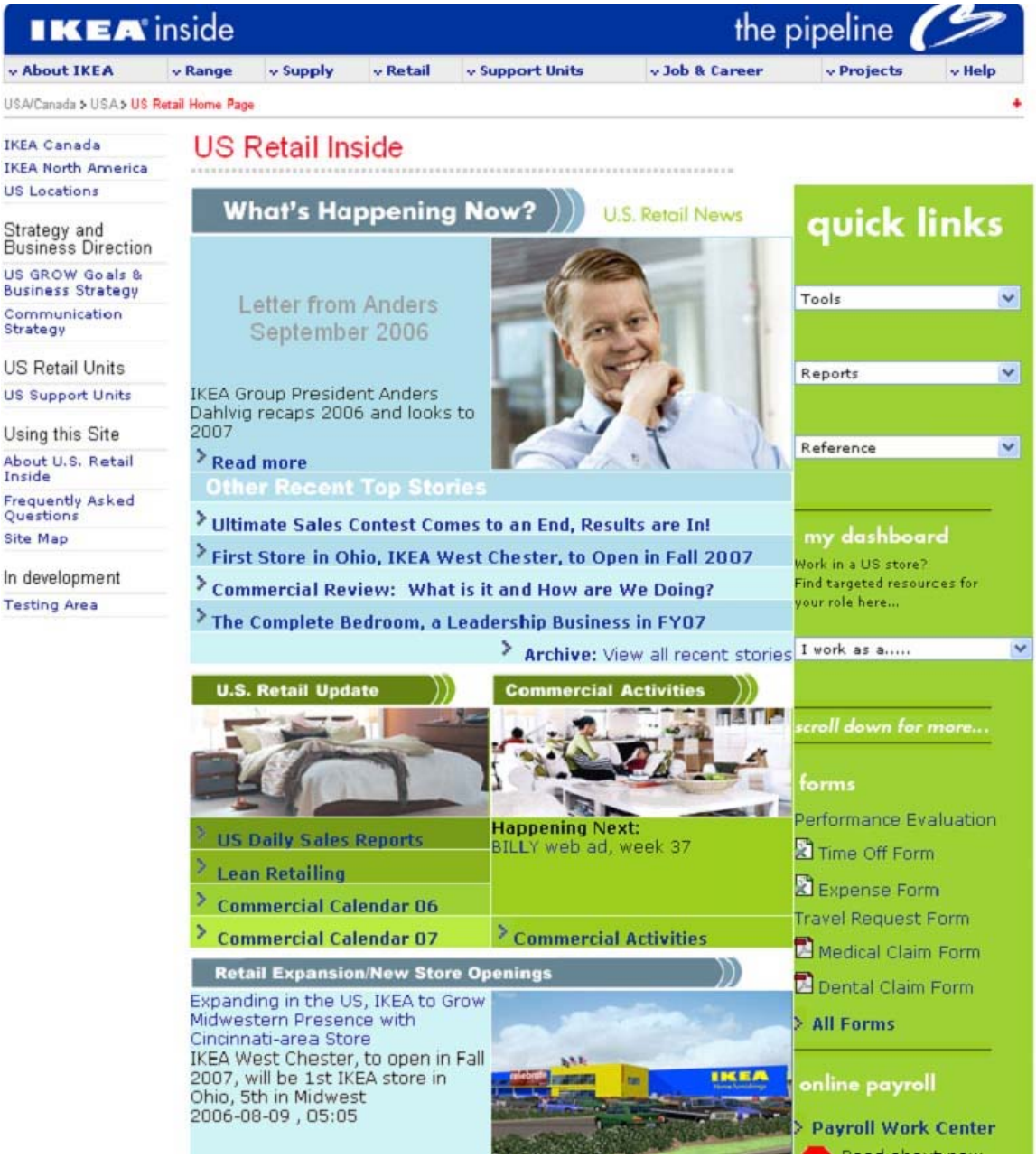
"We said to ourselves, if it's not the right time to actually have portal technology, we'll create pages that mimic the user experience in a portal," says Gleba. "We began conducting research on key roles within our stores and dedicating specific areas on our US intranet to them. These areas became known as *Dashboards*."

The dashboards are a series of role-based pages that allow employees with specific store functions to find all the information they need to do their jobs, all in one place. "The goal is to limit the amount of time that co-workers spend searching for information," says Shafer.

Without the benefit of portal technology or a formal changeover, a shift in thinking had transformed how the team viewed content, structure, labels, and so on, and the site became a de facto portal.

"When our Internal Information team first took on the intranet, it was a way of communicating that wasn't widely understood or embraced," says Shafer. "Because we're a retail company, many of our co-workers don't have their own computers, so at first the value of why we would use a computer-based tool wasn't understood. However, once the core audience was defined (IKEA managers, who all have their own computers) and people realized the efficiency and cost-savings of

communicating in such a way, the acceptance of the intranet has steadily grown. It is now seen as an integral way of connecting to co-workers and sharing information."




Pictured: The previous US intranet homepage. Users had to scroll to see the entire page. Shafer says many users found that annoying. Also, from the publishing standpoint, the format didn't allow for much flexibility.

## Accommodating an Exception

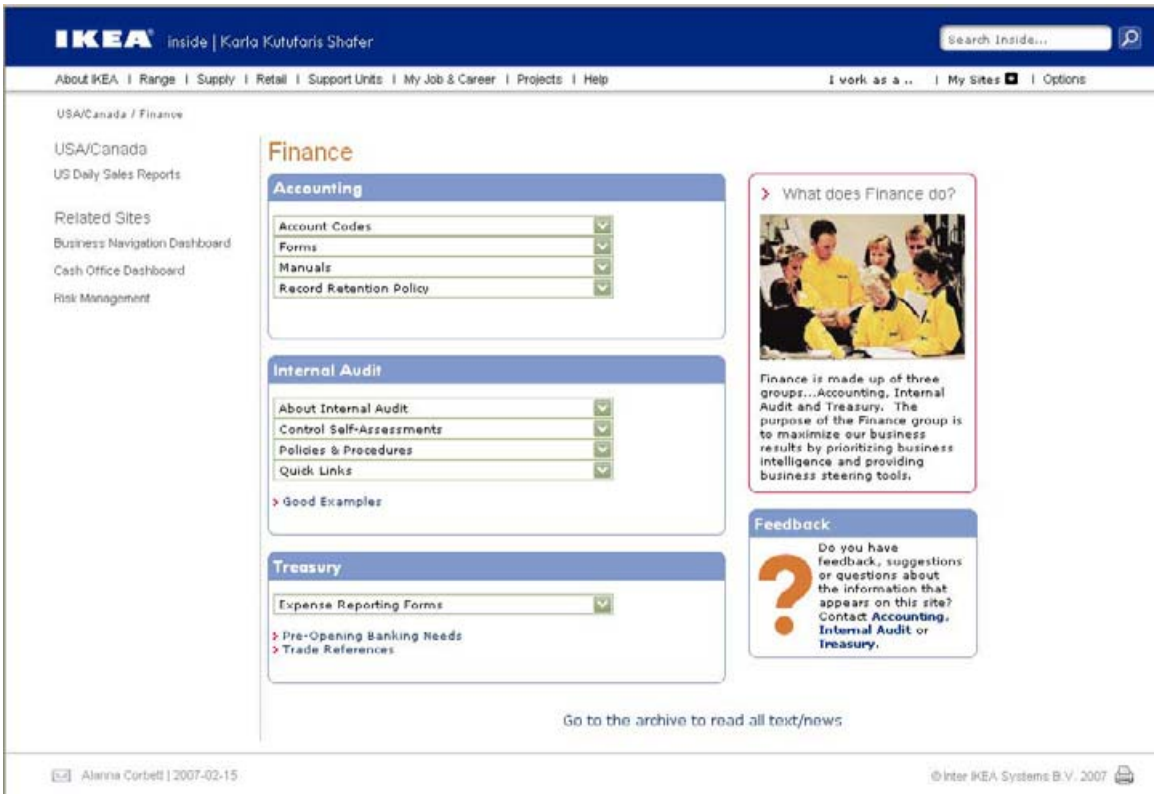
Because there is no Finance Department in the stores, the site's *Finance Department* section is not a dashboard. Instead, it's treated as a "support unit," used primarily by IKEA co-workers in the corporate office.

The Finance Department consists of three different groups, and each has its own "territory" on the page. "I don't think users are confused so much by the interface, but maybe about what this site is for," says Shafer. "There is no finance function in the store. This is purely a support function in the office. Therefore, a site like this theoretically shouldn't exist, but the links on this page should be present on different dashboards."

Other support units include: *Marketing*, *Laws & Standards*, *Distribution Services*, and *Travel Services*. These sites include information that store co-workers would find useful, but the difference is that the information is contained on a separate site instead of integrated into a dashboard. From the *Homepage*, users can access these sites by clicking the *US Support Units Sites* dropdown menu in the *Quick Links* box.

Because sites such as these are a throwback from the way the site was previously architected (where the intranet was aligned to the corporate office instead of to the stores) this site stands out in the new design paradigm.

"We're in the process of taking a hard look at sites like this and re-aligning the content so that it's in the right place for the user," says Shafer.




Pictured: Since there is no finance group in an IKEA store, this webpage is classified as a support unit rather than a dashboard, and is primarily used by co-workers in the corporate office. The design team has worked to make the interface as simple as possible.

## GOALS AND CONSTRAINTS

### Goals

Gleba outlines the stakeholder-related goals of US Retail Inside as follows:

- **End users.** "For our end users, our goal is to quickly and easily connect specific roles in the stores to the information they need to do their job well. 'Quickly' and 'easily' are important, since our co-workers in the stores sometimes have only seconds to find what they need on the intranet."
- **Content publishers.** "For our publishers, we want to create a simple channel that allows senders to work together to distribute information quickly and efficiently."
- **IKEA US.** "For the IKEA US organization, we want to help co-workers connect with the business by creating a two-way dialogue and sharing what they know and think."

### Constraints

Shafer ticks off the usual list of project constraints—budget, time, and resources—but points to a few organization-specific ones as well:

- **Technology.** "We are a lean home furnishings company, not a software company," she says. "For these reasons, the technology that we work with to publish, and the intranet itself, is not sexy or overly sophisticated. But in true IKEA fashion, we make the most from small means."
- **Team size.** "Although we work together as a department, there's only one solely dedicated co-worker (me!) working entirely on supporting the US intranet."
- **Multitasking.** "I think another big challenge is in developing changes while still running a current site."
- **Managing content and contributors.** "Working with our content management tool can be quite challenging because you have to 'let go' and trust in your publishers. It can still be the case that content will get updated when the Infomaster has 'free time' rather than when it's necessary. In addition, consistency, both in appearance and quality of information, is always an issue when you have multiple publishers. Another challenge is that our Infomasters don't report to Internal Information, and leading and managing people who don't actually work for you can be tough!"

## USERS

US Retail Inside serves the 12,000 IKEA co-workers who work at the 33 retail locations in the US. While the IKEA intranet is open to all co-workers, the key audience, according to Shafer, is managers: store managers, assistant store managers, business navigators, customer service managers, HR managers, logistics managers, sales managers, system trainers, cash office managers, interior design managers, and IKEA food service managers.

Pictured: Approximately 65-75% of IKEA store co-workers don't have their own personal computers (only those in management positions do). These co-workers access the intranet through shared terminals in each department.

Pictured: Co-workers can access the intranet while they're on a break using one of the computers in the staff cafeteria or Resource Room (a library with training material and other IKEA information).

## USER TASKS

Common user tasks supported by US Retail Inside:

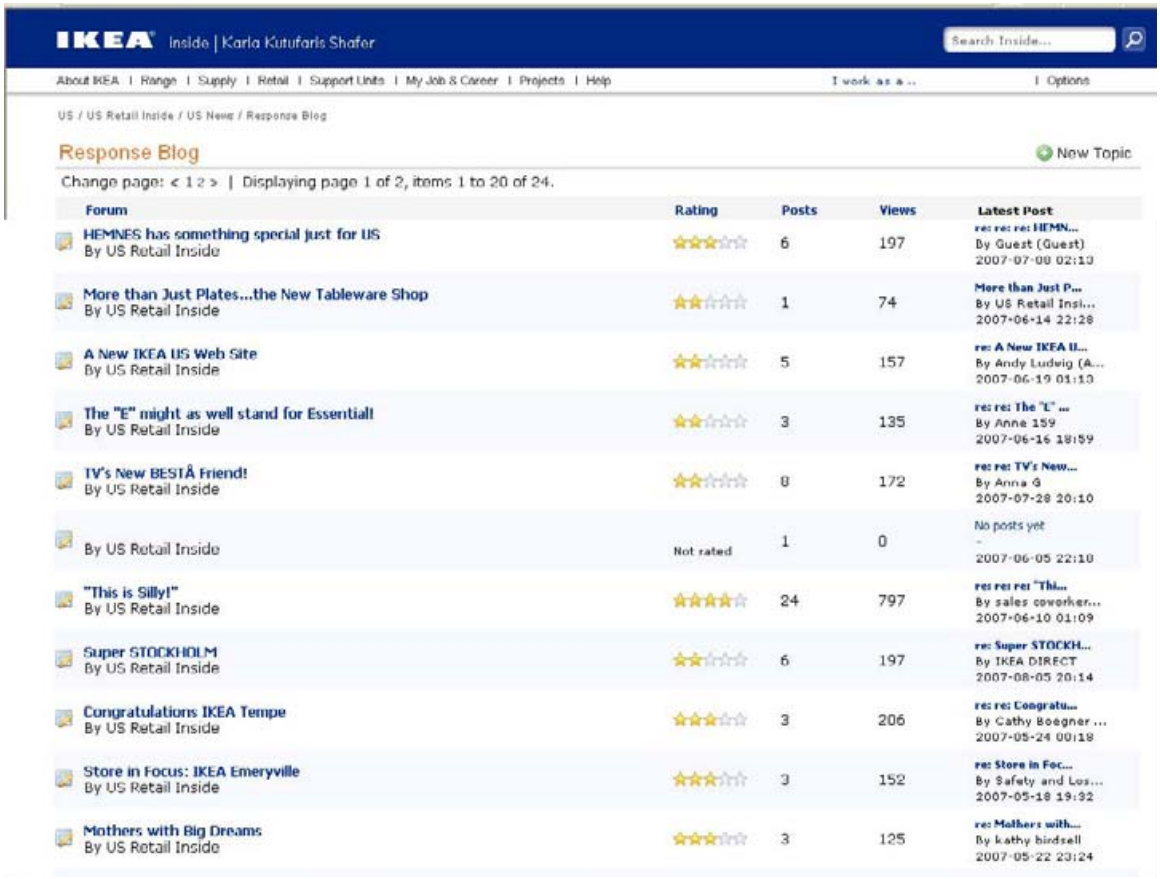
- Find sales reports, merchandising guidelines, product information, and other tools and documents needed for store co-workers to do their jobs
- Get current news about IKEA
- Request travel reservations
- Book conference rooms
- Sign up for training classes
- Fill out expense reports, time off forms, and performance evaluations
- Access tutorials for basic computer applications (*Helpdesk Angel*)
- Look up co-worker information in the *Corporate Directory System*
- Look up store location information
- Learn about IKEA benefits
- Request technical support
- Access payroll information
- Apply for internal job postings

## BASIC INTRANET FEATURES

US Retail Inside has more than 5,000 pages with approximately 50 Infomasters contributing content. The site gets an estimated 600,000 page views per month.

Intranet features include:

- A homepage developed after researching co-workers' most important needs
- A news center that's updated five times a week
- Discussion boards where users can post responses to intranet articles
- Surveys
- An online conference room booking tool
- Link to an online payroll application
- Co-worker lookup tool
- Search tool




Pictured: Discussion forums are linked to news stories and allow co-workers to speak their minds about a current issue or company initiative.

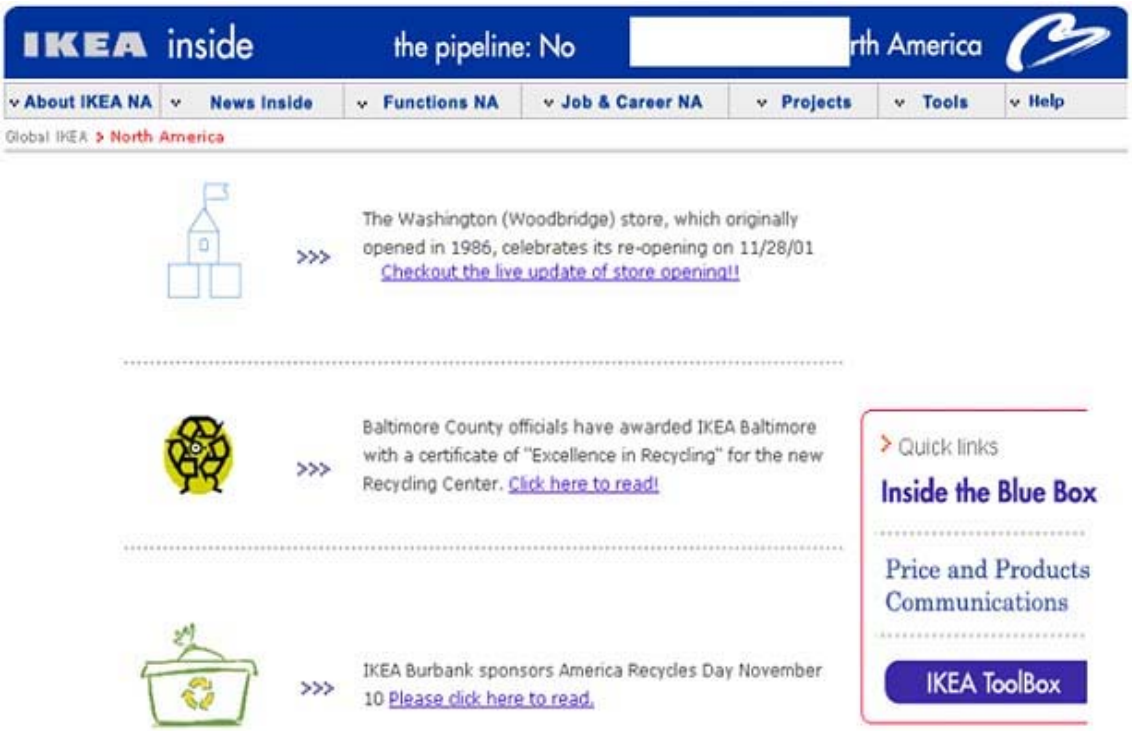
## DESIGN PROCESS AND USABILITY ACTIVITIES

### A Commitment to Continual Improvement

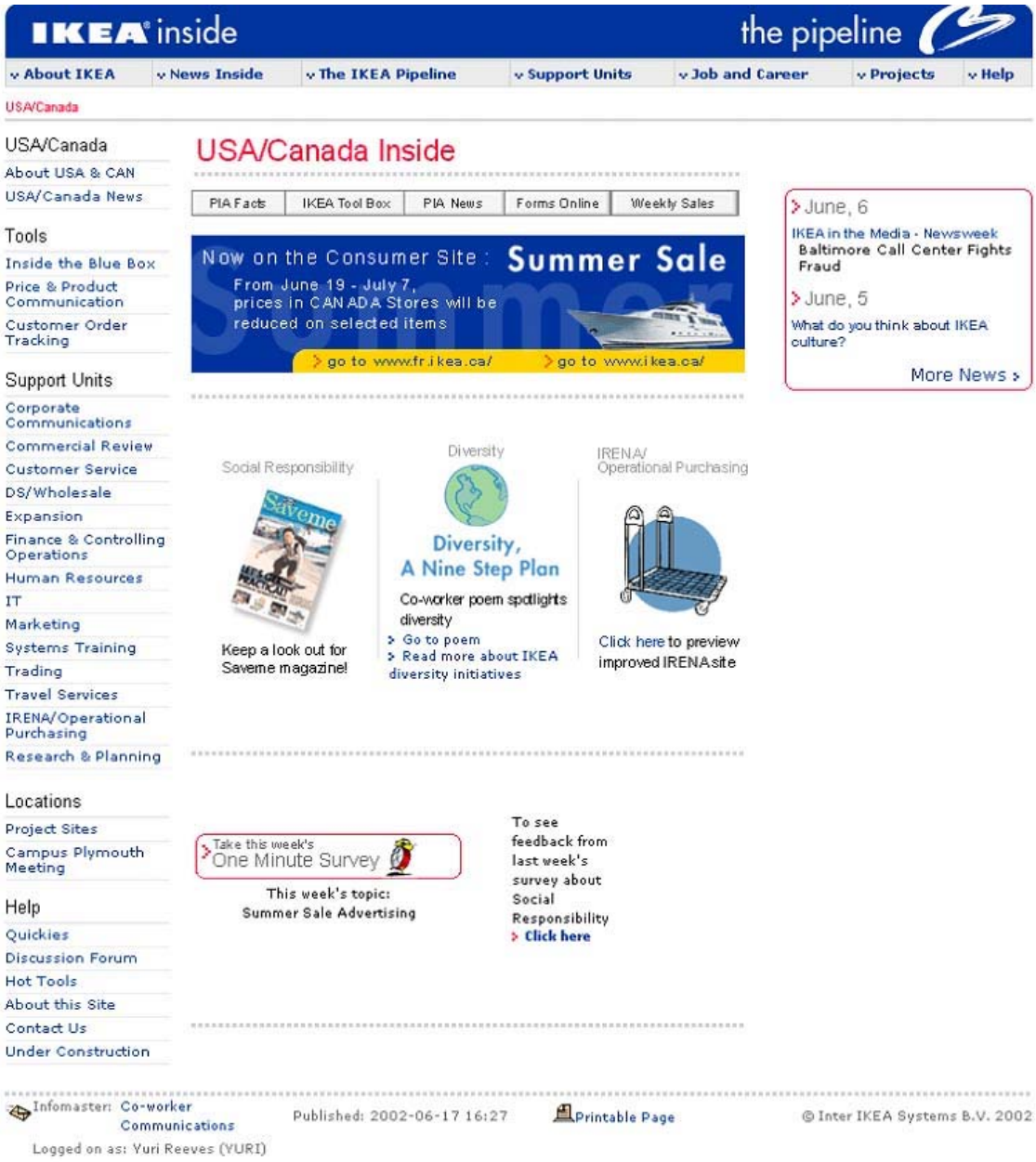
The US intranet team has committed to making continual site improvements. In keeping with that commitment, they've defined an annual process to identify problems, make updates, and conduct a review of the homepage to identify any needed changes. This annual review process gives the team a framework and a timeline for change.

"We evaluate how we're doing each year by conducting a site audit for the US intranet," says Shafer. "We go through each area of the intranet and rate it according to five basic criteria. This gives us a snapshot of how well our site is functioning and where we need improvement."

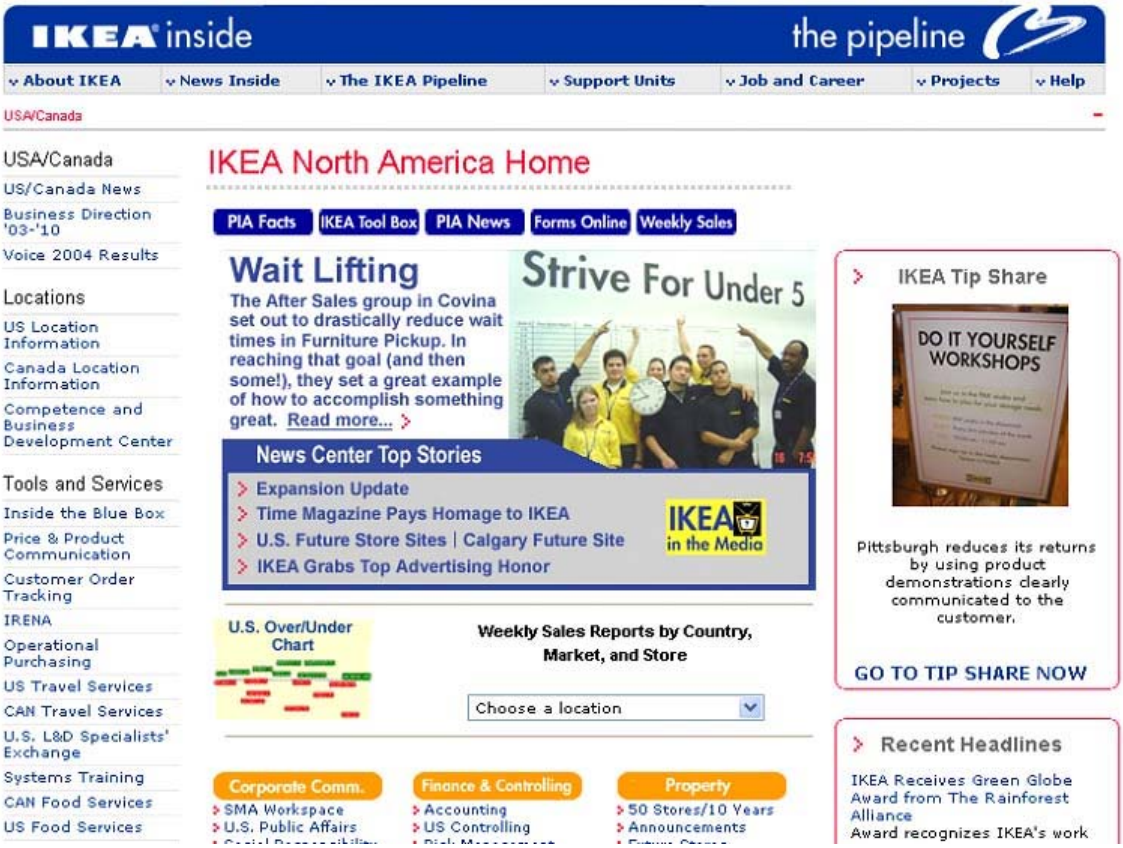
Last year's audit resulted in the decision to completely overhaul the site.




Pictured: The IKEA US Homepage in 2002.




Pictured: The IKEA US Homepage in 2003.




Pictured: The IKEA US Homepage in 2004.

IKEA inside — the pipeline

About IKEA | News Inside | The IKEA Pipeline | Support Units | Job and Career | Projects | Help

USA/Canada > USA > U.S. Retail Inside

U.S. Organization
- U.S. Retail Core Process Groups
- U.S. Locations

Let's Go Retailing
- U.S. Competence Centers
- Showroom
- Furniture
- Markethall
- Com & In
- Logisitcs
- Customer Service
- IKEA Food Service
- U.S. Human Resources
- Environment, Recovery & Social Responsibility
- Safety & Security
- Administration
- Controlling
- Property
- Commercial Review Schedules and Docs

# U.S. Retail Inside

"what I do has a big impact on on the success we will have."

## What's Happening Now U.S. Retail News

Photo Above: The New Philly store a hit with young urban families.

IKEA Houston Celebrates a Successful Soft Opening
The franchise store had people in line eight days early
2004-08-30 , 17:04

Pernille Lopez Delivers Keynote Speech at The Women's Leadership Exchange
IKEA Carson helped design the set for the Long Beach, CA event
2004-08-27 , 17:21

> Review all recently reported stories

## Meeting Our Goals U.S. Retail Update

Text line here

store name + 00
store name + 00
store name + 00
store name + 00
store name + 00
store name + 00
store name + 00
store name + 00
store name - 00
store name - 00
store name - 00
store name - 00
store name - 00
store name - 00
store name - 00
store name - 00

View Weekly U.S. Sales Reports by Country, Market, and Store:

Select a sales report by location

### Retail Expansion

Between now and 2010, IKEA will open 50 stores in North America . **The latest:**

SWEDISH RETAILER IKEA EXPANDS NORTHERN CALIFORNIA PRESENCE WITH PROPOSAL FOR CENTRAL VALLEY STORE IN WEST SACRAMENTO

TIENDA SUECA, IKEA, PROPONE ABRIR UNA TIENDA EN WEST SACRAMENTO
2004-08-09 , 20:39

> Go to N.A. Property Site

Next store to open:

### IKEA In The Media

Hundreds of times each month "IKEA" is mentioned in the U.S. Media. ***Did you see this?:***

Aug.4, 2004
New York Metro.com "Best Bets"
The IKEA LUNNA chair wins this week's "Best Bet" choice.
2004-08-05 , 16:09

Business Week: World's Top 100 Brands. IKEA is # 40!
2004-07-30 , 15:09

> View recent media mentions

> What Ads Are on Now?
> Catalog Information

my dashboard

I work as a ...

Tools

Reports

Look It Up

### competence bank

Competence Board is **pilot project.** It uses an electronic "bulletin board" specifically designed to allow co-workers to share and match unique qualities, skills and

> Sign up to try the Competence Bank

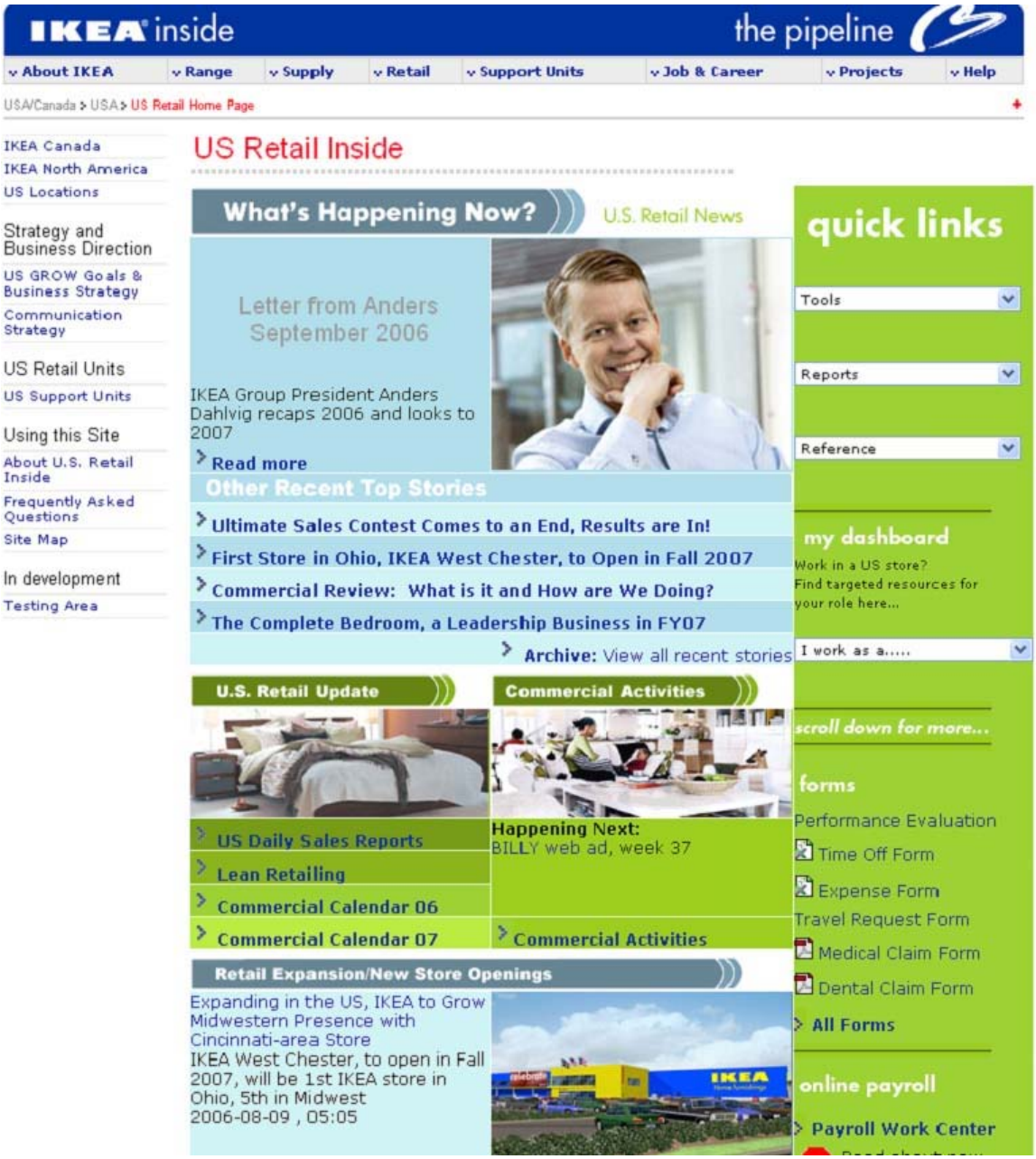
### my IKEA

**My Forms**
- Time Off Form
- Expense Form
- Travel Request Form
- Medical Claim Form
- Dental Claim Form
- > All Forms

**My Benefits**
- Benefits Overview
- Co-Worker Handbook
- Medical Ins. Info
- Dental Ins. Info
- Life Ins. Info
- > Benefits Home

**My Training & Development**
- Competence Centers
- IKEA Business College
- Element K
- > US Learning & Development

Pictured: The IKEA US Homepage in 2005.




Pictured: The IKEA US Homepage in 2006.

Pictured: The IKEA US Homepage in 2007.

## Asking the Users: "What's Wrong?"

Last year's audit began with a user survey. The online survey asked for 10 minutes of a user's time to answer some questions about their intranet use. "Ten minutes is a lot to ask for a busy co-worker in the store," say Shafer. "So, to sweeten the deal, we gave away an iPod."

The survey probed users with questions such as: "Which sections of the US homepage do you use the most?" and "What sites do you go to the most from the US Homepage?" and asked for general feedback. From the survey results, the team was able to tease out trends from the responses and apply that learning to the new design.

The team received nearly a thousand responses. They analyzed the feedback and recognized some common themes: the homepage was too long and too cluttered.

"We made sure that the things people said they used the most were front and center," says Shafer. "Items that people didn't use were taken off. Information that we, as the Internal Information group, wanted people to know about is also prominent (sales figures, store promotions). We designed the page so that everything fell 'above the fold' so that users didn't have to scroll, and made the design clean and simple. And a new search tool was put in place, but that was a global initiative."

The goal for the 2006 redesign was to decrease the amount of time that co-workers spend looking for information. The benchmark Shafer and her team referenced was that a user should be able to find the information they need within two clicks of the

homepage. Tools that every co-worker might need (such as a time-off form) are published directly on the homepage. Tools that are specific to a certain group of co-workers are published on their user dashboard (one click from the homepage).

"We also wanted our format to be flexible enough to allow updating to be quick and simple," says Shafer. "The redesign was done with this question in mind: 'What does every IKEA co-worker in the US need to know?' Then we made sure that the main page was limited to a single screen, using drop downs, since user feedback told us that the previous homepage required too much scrolling."

"Did we mention that we have lean resources?" says Shafer. "Testing was done within the Internal Information group only."

The Internal Information Group consists of four co-workers (at the time of the re-launch it was only three). "We pretty much took user feedback from our survey, came up with a couple of designs, and decided on the one that best met our needs," she says. "We sent the new design to our group of Infomasters to get their feedback and tweaked a bit more from there. Then we just launched it!"

The team also looked for inspiration from the homepages of other countries within the IKEA world. "We 'stole with pride,'" she says, "elements from a couple of different country's homepages. Specifically, the idea for publishing sales figures front and center. I also remember looking to the Google homepage and taking inspiration from its clean, uncluttered design."

Shafer says the team also consulted outside expert research, including the NN/g *Intranet Design Annual*.

# General Web Survey Tool

New Survey | My Surveys | Help Movies | Help

## Test Survey

Back to Survey | Answers | Set Answers | Add Reason

## US Retail Inside

Please note, we know the iPod is really cool, but please just one response per person. Your name will be entered into the drawing only once!

**1. Who are you?**
**(Required)**

- Part-time co-worker
- Full-time co-worker
- Department Manager/Shopkeeper/Specialist
- Steering Group Member
- Store Manager
- Service Office co-worker
- Terminal co-worker
- Other (please specify)

**2. From where do you most commonly access the intranet?**
**(Required)**

- Computer at my desk
- Computer on the sales floor
- Computer in the resource room
- Other (Please Specify)

**3. About how often do you use the US Intranet?**
**(Required)**

- Daily
- More than once a week
- Once a week
- Few times a month
- Other (please specify)

**4. How strongly do you agree with these statements?**
**(Required)**

| | Strongly agree | Agree | Neutral | Disagree | Strongly disagree |
|---|---|---|---|---|---|
| "The US homepage allows me to easily find what I'm looking for" | ○ | ○ | ○ | ○ | ○ |
| "The information on the US homepage is up-to-date and timely" | ○ | ○ | ○ | ○ | ○ |
| "I like the way the US homepage looks" | ○ | ○ | ○ | ○ | ○ |
| "I'm comfortable with the amount of information on the US homepage" | ○ | ○ | ○ | ○ | ○ |

5. Listed below are the sections that make up the US homepage.

Pictured: The Web survey tool is a quick and simple tool that the team used to gather user feedback about the site and guide last year's homepage redesign.

### Silence is Golden

"We launched it last September and waited for the fallout that comes with any kind of change," says Shafer. "Surprisingly, nothing dramatic happened at all and feedback (or lack thereof) told us that users where finding what they needed. We thought that such a change would really generate a lot of questions and comments, but that didn't happen."

No formal follow-up testing is planned to confirm the initial response to the redesign, but the team stands behind their pledge to continual improvement.

"We think of our intranet as a continual work in progress," says Shafer. "It's continually being tweaked and nudged according to what we hear our how our business is working."

### Annual Redesign

The US intranet homepage is redesigned and launched at the beginning of every fiscal year (September 1). The annual redesign spans approximately four months and includes the following elements:

- An extensive user survey and analysis of the results
- Wireframe designs and design discussions
- Design implementation

## RESULTS

The results of the new homepage design are quantifiable: the page views for US Retail Inside have gone up considerably over the past year. "In 2006, we averaged about 400,000 page views per month for the homepage," says Shafer. "In 2007, we've seen this number go up to an average of almost 600,000 views per month."

Shafer notes two possible reasons for the increase in page views:

- Users are checking out the homepage more often because the content is now updated more frequently. (At the beginning of fiscal year 2007, the Internal Information team made the commitment to publish three new articles per week: one for the *IKEA People* section and two for *What's Happening Now*.) This is evidenced by the increase of page views for the news stories, which are getting more hits than last year, even though they are not featured for as long a time.
- Harder to quantify is that page views have increased because users find the intranet easier to navigate so are simply using it more.

Shafer says that the redesigned homepage now lets users:

- Find the information they need more easily (the goal is for users to find what they need within two clicks of the homepage)
- See what promotion is currently happening in the stores (*Home Furnishings Focus* box) and learn what's coming up next
- See cool new stuff about IKEA twice a week (*What's Happening Now* box)

- Learn something new about fellow co-workers each week (*IKEA People* box)
- See the state of the business at a glance (*Sales Update/Goals* box)
- Join a discussion forum about news stories that are featured on the homepage
- Get to job-related information that's specifically focused on the user's retail role

## LESSONS LEARNED

**Lessons learned from Karla Shafer:**

**Simplicity and consistency rule.** "These two principles seem to be the key to making navigation easier for the user. Also, if you continually 'think like a user' the organization of the intranet seems to work itself out."

**Don't let a small budget limit your goals.** "An IKEA motto is 'good results with small means' and we achieved this with the redesign of our homepage. It taught us that lack of a big budget doesn't have to compromise the goal of a project."

**Our intranet is important, but not mission critical.** "We can't close our stores or turn off our registers if the intranet goes down, so we're careful about building redundancy in when we publish must-have content."

**Lessons learned from Beth Gleba:**

**Tap into your corporate culture.** "After all, a company intranet is more than just a bunch of content, it's the reflection of your organization—and I mean that in bigger terms than just the 'visual branding.' It's about how information flows, how people work together, what's acceptable and what's not. All of this gets expressed somehow in your intranet. Understanding and tapping into your own corporate culture will make it easier to see the roadblocks ahead, but to also figure out how you're going to make it all work."

**Consider all your stakeholders.** "Another lesson learned is about taking the time to consider other stakeholders—beyond our own department—who need to be a part of any big changes. Other stakeholders like the training group, who does an orientation with every co-worker on our intranet, or the HR group, who relies on the intranet to help co-workers find important benefits information. It's the recognition that we're all working together and need to work together."

# L.L.Bean

### Using the intranet

L.L.Bean, Inc. is a privately held, family-owned company that provides quality apparel, reliable outdoor equipment, and expert advice for outdoor activities. Company jobs range from corporate management to retail sales, catalog services, distribution, returns, IT, and HR. Most L.L.Bean employees are based in locations throughout Maine. US store locations extend south from Bangor, Maine, to MacLean, Virginia. International locations include China, Costa Rica, Japan, Hong Kong, Taiwan, Thailand, and Vietnam.

**Headquarters:** Freeport, Maine

**Number of employees the intranet supports:** 5,300 to 12,200

### Locations of intranet users

**Countries:** The US and Costa Rica (programmers, sourcing, and supply chain)

**States:** Maine, Connecticut, Delaware, Illinois, Maryland, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, and Virginia.

**Annual sales:** more than $1.5 billion

### Intranet design team

The core team consisted of five people from the HR department

### Members

Leah Fitch, lead intranet designer; Linda Carew, project manager; John Vincent, intranet administrator; Laurie Gonyea, intranet designer; Melissa Coleman, intranet designer.

## SUMMARY

The resourceful designers at L.L.Bean met their design challenges straight on, with quick thinking and wide-open minds.

The L.L.Bean intranet homepage grabs your attention right away with interesting photographs related to the top news story. Photos of real people doing real, outdoorsy things capture the culture and experiences of the organization. The featured story appears in the upper left of the homepage. A title bar encloses the related image and displays the article's title. Below the title is a short article description and a link to the full story. Having these attention-grabbing images and stories in a prominent place on the homepage reminds employees of all the interesting and fun things happenings at L.L.Bean. These stories can keep people interested and inspired.

Located just below the story of the day are links to interesting and important pieces of data about the business. The *Daily Call Volumes*, *Website Orders*, and *Website Orders Chart* help people better understand the business and its most current state of affairs, and helps people do their jobs more efficiently.

More news items appear in *Latest News,* which occupies the homepage's center section. Article titles are clickable links and appear in bold, blue type. Each article has a brief yet telling summary, which entices people to keep reading.

Below the news is the week's calendar. Dates and descriptions of various corporate events, meetings, and deadlines keep employees on top of things.

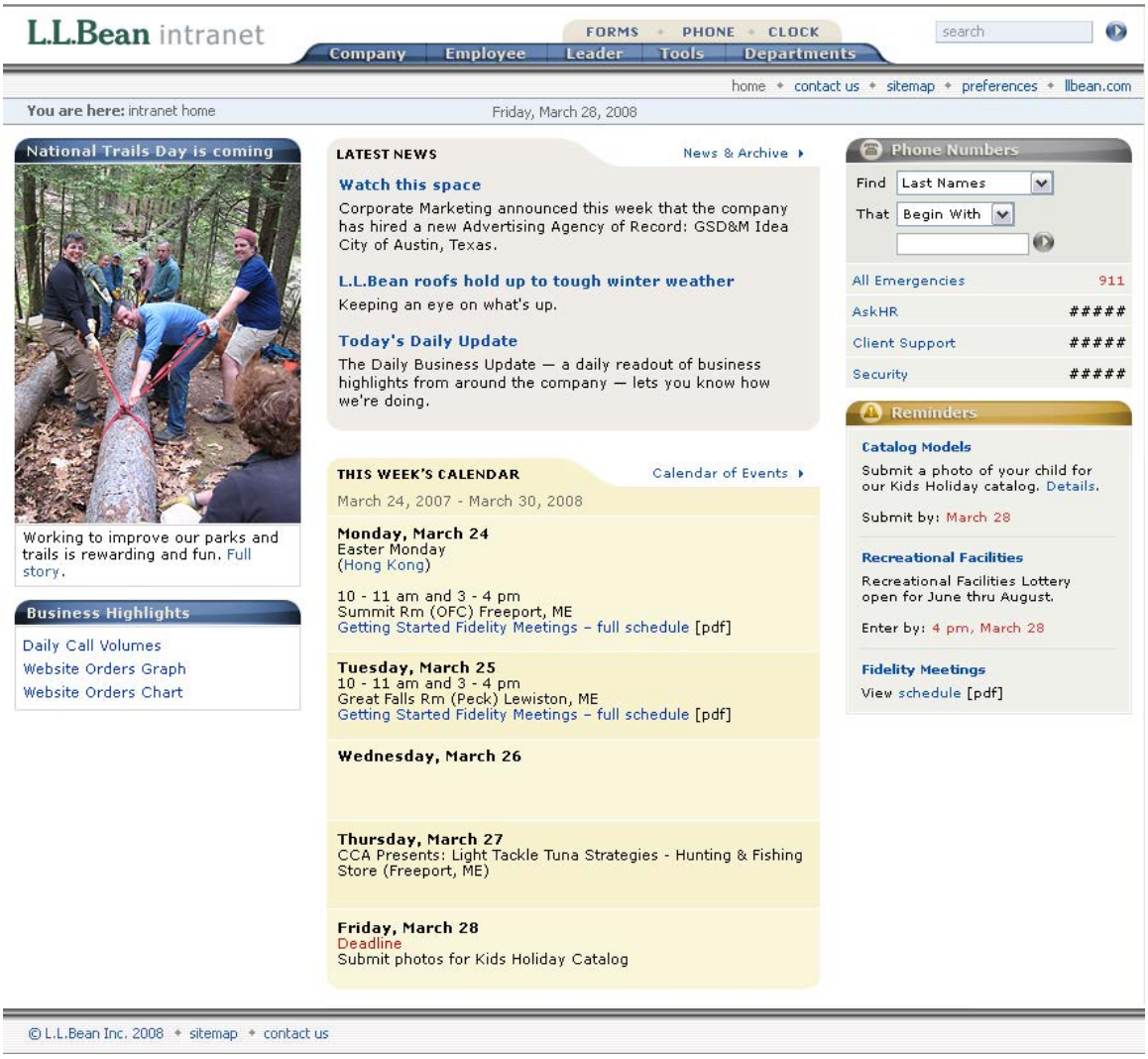
Important phone numbers for emergencies, security, HR, and support appear in the upper right of the homepage. And corporate reminders are located just below. These can include anything from asking for volunteers to help maintain a hiking trail (which in the end will likely also help L.L.Bean business) to the date of a corporate blood drive.

## 10 Best Intranets: L.L.Bean

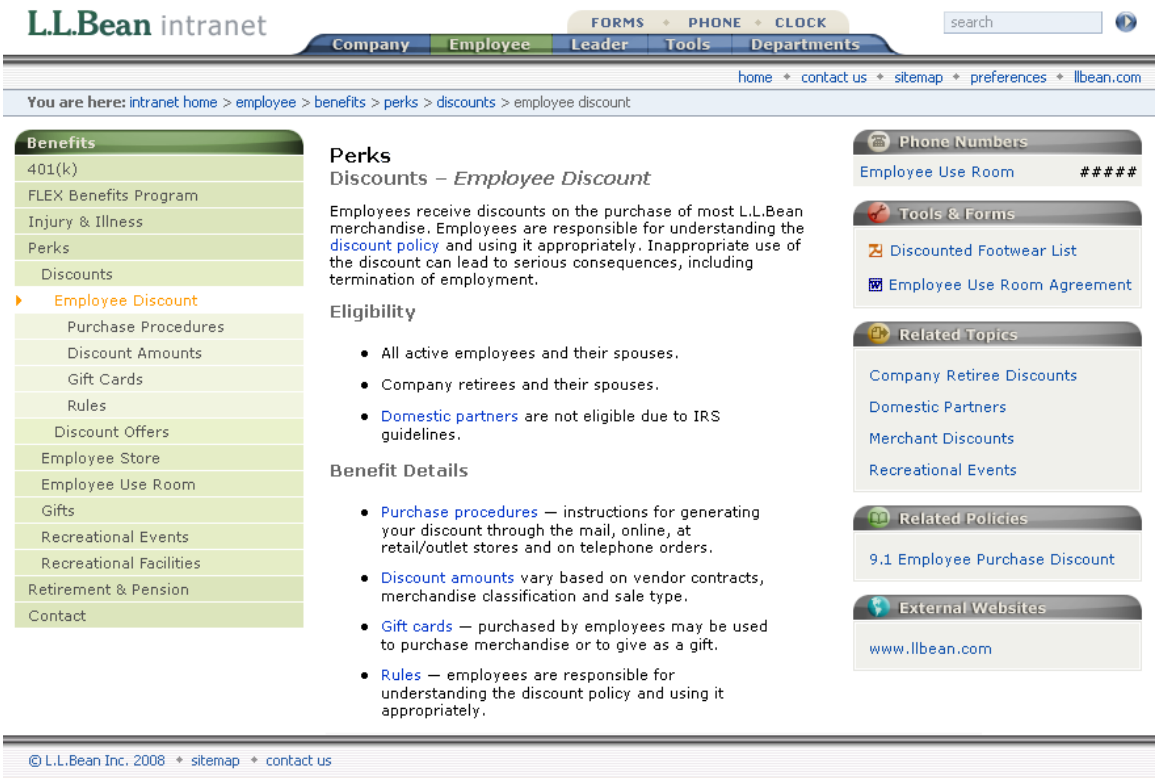
Pictured: The interesting main story and related image keep people engaged on the homepage. The news, calendar, and important links make finding information and doing everyday tasks easy.

The designers also plan to make colorful skin options available for the intranet in the next release. In one skin, for example, the designers replaced the interface's flat tabs with a beveled-glass look and modified the colors for certain blocks of content. Users will be able to choose whether to keep the current skin or select one with more saturated colors.

## 10 Best Intranets: L.L.Bean




Pictured: An example skin. Designers will be providing different skins for users who prefer more saturated colors.




Pictured: Users will also be able to display content pages in different skins. Shown here, saturated skins (versus the muted skins) carry through to content pages.

In the homepage's calendar area, mousing over an item with a dotted underline opens a tool tip with a longer description. In addition to giving more information, these tooltips help bond the teams on an international level. Although most L.L.Bean employees work in the Eastern US, the company also has international locations and employees in China, Costa Rica, Japan, Hong Kong, Taiwan, Thailand, and Vietnam. Because holidays in these regions can be different, and foreign, the intranet team added tooltips to domestic and international holidays in the calendar. These tips provide a cultural description and help educate and broaden the awareness of all employees.

Pictured: Users can mouse over calendar items with dotted underlines to see tooltips that offer a longer description.

To see more events, users can click the *Calendar of Events* link that appears in the upper right of the homepage's weekly calendar. This area provides a month-by-month view of all corporate events for the entire year. This resource helps employees schedule and plan more accurately. This area is also the source for the weekly calendar entries, which are manually transferred each week to the homepage. This is a creative workaround, as intranet development team members can't download software from the Internet to build a more dynamically generated calendar.

Events are listed in the day blocks and are links to further information. Where appropriate, event times are also displayed. Links (the event title) are blue, time is yellow, and further information is in black. Users can navigate to the month before or the month after using the *Previous* and *Next* links in the upper left. Alternatively, they can choose from the drop-down month and date pickers, or use the *Today* link.

# 10 Best Intranets: L.L.Bean

L.L.Bean intranet

FORMS • PHONE • CLOCK

search

Company | Employee | Leader | Tools | Departments

home • sitemap • contact us • llbean.com

Previous Next

## June 2008

Today Jun 2008

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|---|---|---|---|---|---|---|
| 1 | 2<br>Recreational Facilities Lottery open for September thru November | 3<br>5:30 pm<br>Free Group Road Bike Rides [pdf] - Discovery Park (Freeport, ME) | 4<br>11 am - 5 pm<br>Blood Drive - Retail Store (Freeport, ME) | 5<br>5:30 pm<br>Free Group Mountain Bike Rides [pdf] - Bradbury Mountain (Pownal, ME) | 6<br>Deadline<br>Submit March Into May Activity Logs<br>Bike, Boat & Ski Store Clinics [pdf] (Freeport, ME)<br>7 pm<br>Fishing Clinic [doc] Late Season Trolling by Cannon Pro Staff - Hunting & Fishing Store (Freeport, ME) | 7<br>8 - 11 am<br>Fishing Derby<br>8 am - noon<br>Greater Portland / Freeport Trail Maintenance - National Trails Day at Bradbury Mountain State Park (Pownal, ME)<br>10 am and 2 pm<br>Weekend Demonstrations - Hunting & Fishing Store (Freeport, ME)<br>Bike, Boat & Ski Store Clinics [pdf] (Freeport, ME) |
| 8<br>Tuen Ng Festival (Dragon Boat Festival) (6/8-6/9) (China), (6/8-6/9) (Hong Kong), (Taiwan)<br>10 am and 2 pm<br>Weekend Demonstrations - Hunting & Fishing Store (Freeport, ME) | | 11 - 1:30 pm<br>Aetna SmartSource meetings - Great Falls Falls Rm, Peck Call Center (Lewiston) - full schedule [pdf]<br>5:30 pm<br>Free Group Road Bike Rides [pdf] - Discovery Park (Freeport, ME) | 11<br>9 am - 3 pm<br>Blood Drive - Manufacturing (Brunswick, ME)<br>11:30 am - noon<br>noon - 12:30 pm<br>Aetna SmartSource meetings - Cafeteria, Manufacturing (Brunswick) - full schedule [pdf] | 12<br>5:30 pm<br>Free Group Mountain Bike Rides [pdf] - Bradbury Mountain (Pownal, ME) | 13<br>Bike, Boat & Ski Store Clinics [pdf] (Freeport, ME)<br>7 pm<br>Hunting & Fishing Clinic [pdf] Trout fishing with dry flies - Hunting & Fishing Store (Freeport, ME) | 14<br>**FLAG DAY**<br>10 am and 2 pm<br>Weekend Demonstrations - Hunting & Fishing Store (Freeport, ME)<br>Bike, Boat & Ski Store Clinics [pdf] (Freeport, ME)<br>7:30 pm<br>L.L.Bean Summer Concert Series [pdf] - April Verch (Canadian Fiddle) - Discovery Park (Freeport, ME) |
| 15<br>**FATHER'S DAY**<br>10 am and 2 pm<br>Weekend Demonstrations - Hunting & Fishing Store (Freeport, ME) | 16<br>Deadline<br>Complete the required Health Questionnaire.<br>noon - 6 pm<br>Blood Drive - Call Center (Waterville, ME) | 17<br>5:30 pm<br>Free Group Road Bike Rides [pdf] - Discovery Park (Freeport, ME) | 18<br>O Full Moon | 19<br>7:30 am - 12:30 pm<br>Blood Drive - Returns (Freeport, ME)<br>5:30 pm<br>Group Mountain Bike Rides [pdf] - Bradbury Mountain (Pownal, ME) | 20<br>Bike, Boat & Ski Store Clinics [pdf] (Freeport, ME)<br>7 pm<br>Fishing Clinic [doc] Kayak Fishing - Hunting & Fishing Store (Freeport, ME) | 21<br>L.L.Bean PaddleSports Festival [pdf] 6/21-6/22 - Freeport Campus (Freeport, ME)<br>10 am and 2 pm<br>Weekend Demonstrations - Hunting & Fishing Store (Freeport, ME)<br>Bike, Boat & Ski Store Clinics [pdf] (Freeport, ME)<br>7:30 pm<br>L.L.Bean Summer Concert Series [pdf] - Big Bad Voodoo Daddy (Swing) - Discovery Park (Freeport, ME) |
| 22<br>10 am and 2 pm<br>Weekend Demonstrations - Hunting & Fishing Store (Freeport, ME) | 23<br>9 am - 3 pm<br>Blood Drive - Surace (Freeport, ME) | 24<br>8 am - 3 pm<br>Blood Drive - OFC (Freeport, ME)<br>1:30 - 6:30 pm<br>Blood Drive - Peck (Lewiston, ME)<br>5:30 pm<br>Free Group Road Bike Rides [pdf] - Discovery Park (Freeport, ME) | 25<br>11 am - 6 pm<br>Blood Drive - Northport Complex (Portland, ME) | 26<br>7:30 am - 2:30 pm<br>Blood Drive - Taylor/Casco/LL Complex (Freeport, ME)<br>1:30 - 6:30 pm<br>Blood Drive - Call Center (Bangor, ME)<br>5:30 pm<br>Group Mountain Bike Rides [pdf] - Bradbury Mountain (Pownal, ME) | 27<br>4 pm Deadline<br>Recreational Facilities Lottery<br>Bike, Boat & Ski Store Clinics [pdf] (Freeport, ME)<br>7 pm<br>Hunting & Fishing Clinic [pdf] Pond fishing and the Green Drake - Hunting & Fishing Store (Freeport, ME) | 28<br>10 am and 2 pm<br>Weekend Demonstrations - Hunting & Fishing Store (Freeport, ME)<br>Bike, Boat & Ski Store Clinics [pdf] (Freeport, ME)<br>7:30 pm<br>L.L.Bean Summer Concert Series [pdf] - Martin Sexton (Contemporary Folk) - Discovery Park (Freeport, ME) |
| 29<br>10 am and 2 pm<br>Weekend Demonstrations - Hunting & Fishing Store (Freeport, ME) | 30<br>Deadline to submit ECOBean Prize Drawing Form. | 1 | 2 | 3 | 4 | 5 |

Brightly painted and decorated canoe races are the highlight of the Dragon Boat Festival or Tuen Ng Festival which commemorates the death of minister and patriotic poet Qu Yuan who drowned in the Milou River. Another popular festival tradition is to eat Zong Zi, steamed rice balls filled with meat, nuts or fruit and wrapped in corn or bamboo leaves.

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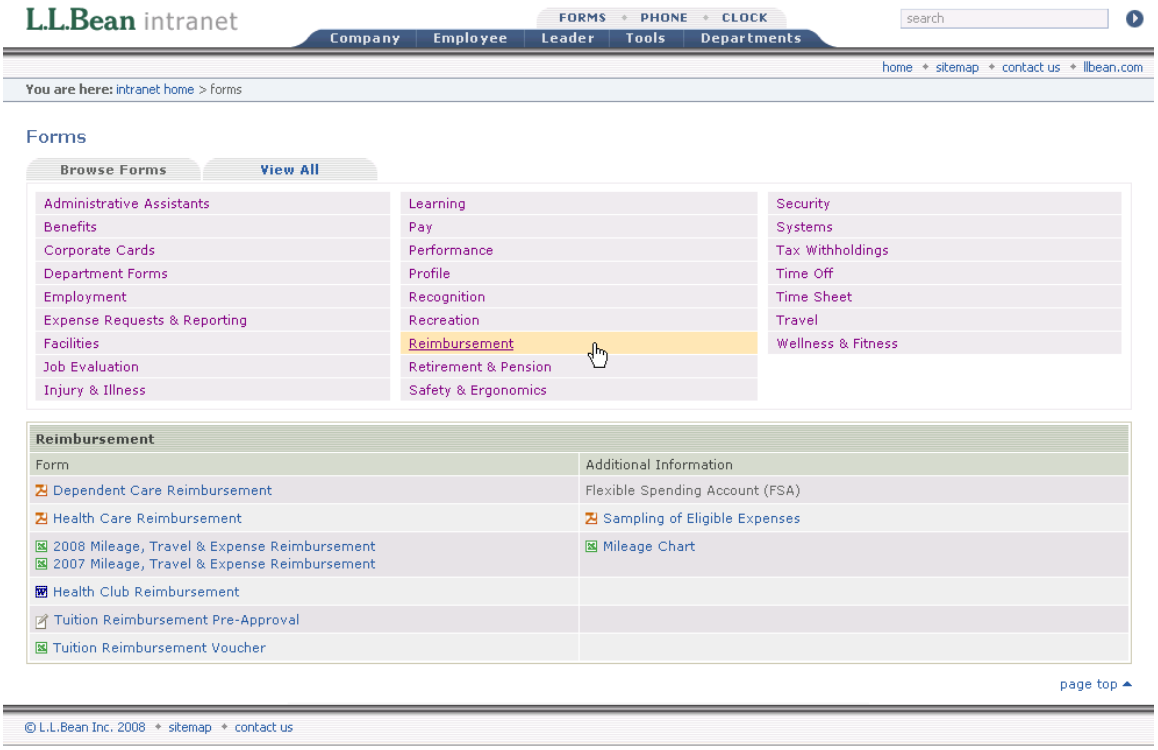
Pictured: The calendar of events is created a year in advance, and is updated as needed.

The L.L.Bean intranet designers were resourceful in working within limitations to ensure that people can access the tools they need to do their jobs. Because the group doesn't have access to a relational database, the intranet provides applications as forms. And, rather than just giving flat forms, designers creatively used dynamic code within them to enhance the user experience.

To access the forms page, users click the *Forms* tab available at the very top of all pages. Once there, users start out in the *Browse Forms* tab/view. Here, the forms are sorted by understandable categories, such as *Benefits*, *Facilities*, *Job Evaluation*, *Learning*, *Retirement & Pension*, and *Time Sheet*. Employees can use these categories to find related forms.

When users click a link in the topics list in the top half of the page's content area, the bottom half of the content area changes, displaying the topic area name followed by links to all of that topic's forms. The area also includes an *Additional Information* section for various forms.




Pictured: Users can browse the list of forms by category headings. The forms in the selected category are displayed in the bottom half of the page.

Alternatively, users can choose the *View All* tab view. This presents the same forms as the *Browse Forms* tab, but offers them in one long list. This option can help users who know the exact name of the form they need, as well as those who are less familiar with the category names.

# 10 Best Intranets: L.L.Bean

L.L.Bean intranet

FORMS + PHONE + CLOCK

Company | Employee | Leader | Tools | Departments

search

home + sitemap + contact us + llbean.com

You are here: intranet home > forms

## Forms

Browse Forms | View All

| Administrative Assistants | |
|---|---|
| Form | Additional Information |
| Audio/Video Request | |
| Business Cards | |
| Cafeteria Catering Requests | Taylor Building - Freeport, ME |
| Facilities Tour Request | |
| First Aid Supplies Orders | |
| Invoice Request | |
| Mail/Courier Delivery Time Change Request | |
| Name Tag Orders | |
| Reprographics Request | |
| Signage Orders For Office | Velcro backing |
| Stamps | Self inking and hand stampers with ink pad. |

| Benefits | |
|---|---|
| Address Change | |
| **Dental** | |
| Form | Additional Information |
| Dental Benefits Request | |
| **Dependent Care** | |
| Form | Additional Information |
| Dependent Care Reimbursement | Flexible Spending Account (FSA) |
| Attending Physician's Statement | Handicapped Child/Disabled Student. Applies to MD, ME, NH, and NY. |
| Request for Continuation of Medical Coverage | Handicapped Child/Disabled Student. Applies to MD, ME, NH, and NY. |
| **Domestic Partner & Dependent Status** | |
| Form | Additional Information |
| Certification of Domestic Partnership and Dependents | |
| Termination of Domestic Partnership or Tax-qualified Dependent Status | |
| **FLEX Benefits Enrollment** | |
| Form | Additional Information |
| Enrollment Deadline Extension Request | |
| **Flexible Spending Account (FSA)** | |
| Form | Additional Information |
| Direct Deposit Authorization | |
| Dependent Care Reimbursement | Flexible Spending Account (FSA) |
| Health Care Reimbursement | Sampling of Eligibile Expenses |
| **Life Insurance** | |
| Form | Additional Information |
| Evidence of Insurability | |
| Life and AD&D Insurance Designation of Beneficiary | |
| **Medical Benefits Claims** | |
| Form | Additional Information |
| Benefit Request | Preferred Provider Organization (PPO), Indemnity, Super 65, and Williamsburg VA POS. |
| **Out of Network Benefits Request** | |
| Form | Additional Information |
| Outside Point Of Service (POS) Network Claims | Call Aetna at 1 (877) 823-1770 for a POS Claims Envelope. |
| Prescription Drugs Claim | |
| Coverage Request | Request to cover continuing care from an out of network healthcare professional. |
| **Prescription** | |
| Form | Additional Information |
| Aetna RX Home Delivery Order | |
| **Primary Care Physician (PCP) Selection** | |
| Form | Additional Information |
| PCP Selection Worksheet | Outside Point Of Service (POS) Network Claims for all states. |

page top

| Corporate Cards | |
|---|---|
| Form | Additional Information |
| Purchase Card Application | |
| Travel Card Application | Spend Authorization Matrix |

page top

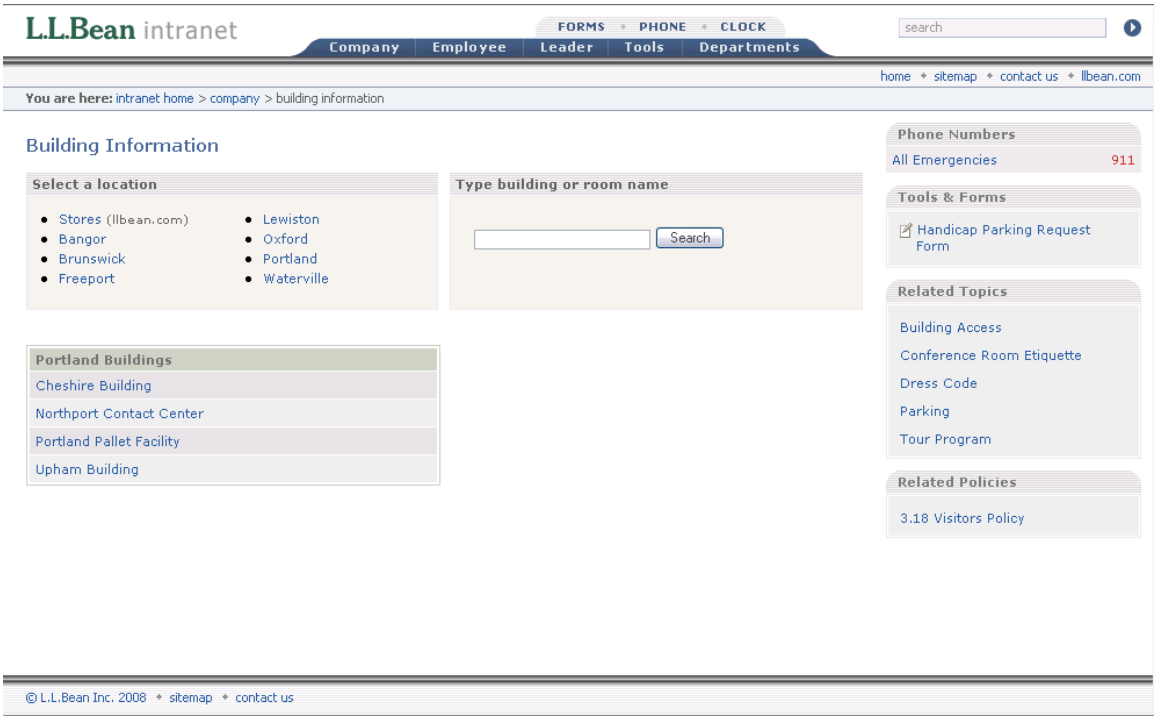
| Department Forms | |
|---|---|
| Form | Additional Information |
| Corporate Procurement | |
| End-User Computing Services (ECS) | |
| Facilities | Facilities' self-service online work order. Login required. |
| Finance | |
| Information Services (IS) - Employee Requests | |

page top

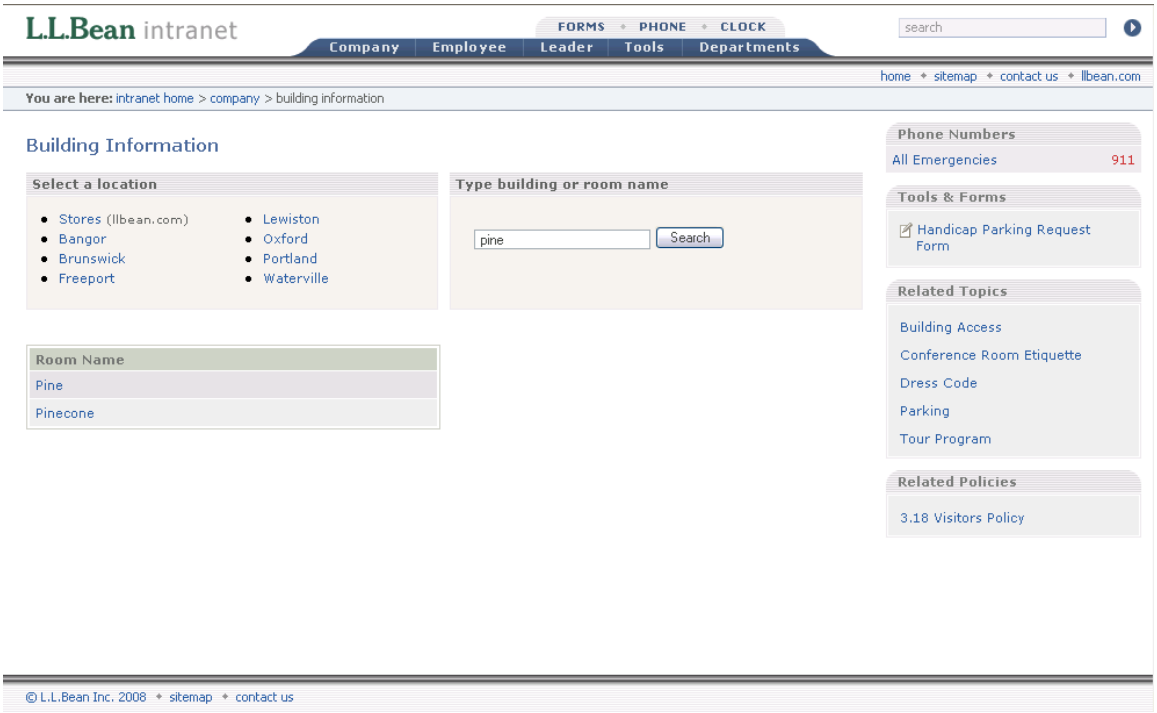
Pictured: Users can view all of the offered forms at once via the *View All* tab.

When employees visit different offices and stores, they need to find places to have meetings in those locations. The *Building Information* tool is one that is often used and well received by L.L.Bean employees.

On the *Building Information* main page, users can select from a list of links for each city or town. it's easy to sort through them. When selected, the list of buildings in that town is displayed. Users can also use the building search function and type in the open field. Results are displayed below.




Pictured: Users can browse for buildings in the *Select a location* box. Once selected, the screen displays a list of that city's buildings.




Pictured: Users can also use the building *Search* tool. Results are displayed below.

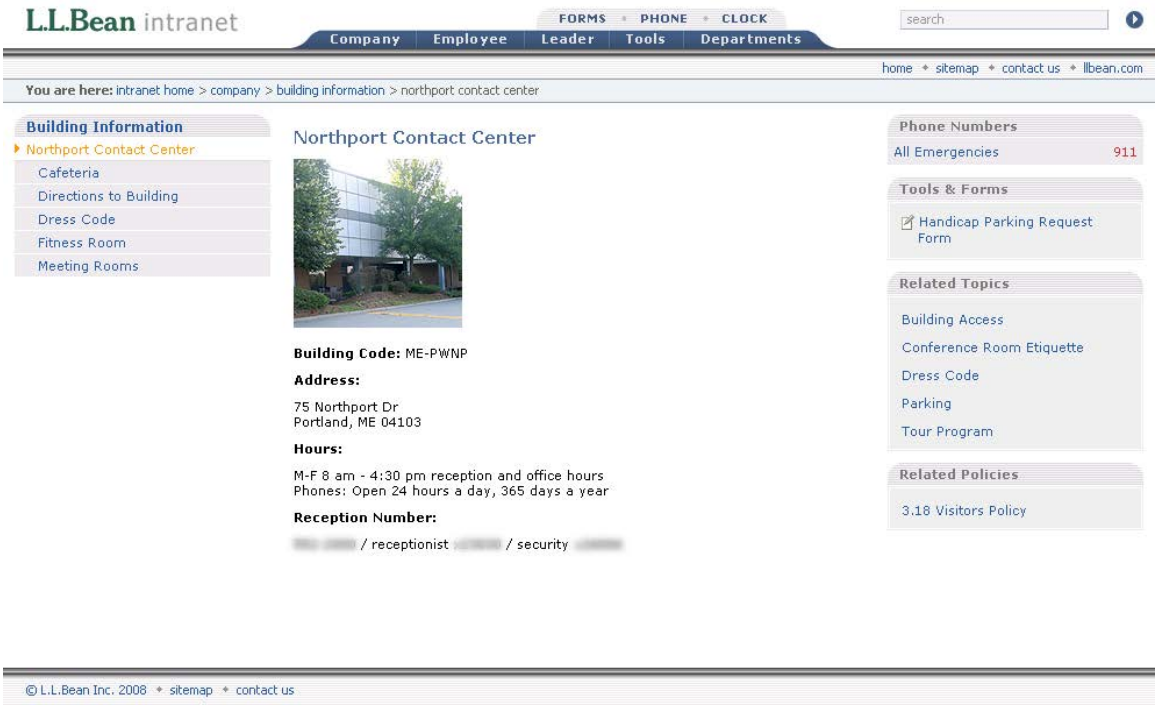
Once in a building's details page, the user can see several elements, including the building's name, code, address, hours, telephone hours, and the telephone numbers and extensions for reception and security.

The left-side context menu offers many other choices. Users can get information about the cafeteria and the fitness room—one or both of which employees often care a lot about. In addition to getting basic building and room information such as hours and a description, users can get directions, find out about appropriate attire, and learn about meeting rooms and their features, such as their capacity and equipment, including whether they have a TV, VCR-DVD, network access, and so on.

Designers knew this section would have required hundreds of hard-coded pages that would have been challenging to update. To alleviate this, they decided to dynamically generate the page for each building or room from the flat file, which is easily updated in one place via MS Excel.

The right contextual navigation—here and throughout the L.L.Bean intranet—provides links to the supporting documents pertaining to each page's content. Categories make it easy for users to scan the links and find the particular resource they're seeking. The right navigation includes:

- *Phone Numbers* (contact information)
- *Tools & Forms* (for files relevant to the content)
- *Related Topics* (similar topics or topics that also reference the content)
- *Related Policies* (*Company Policies & Guidelines* related to the target content)
- *External Websites* (access to resources outside of the company intranet)



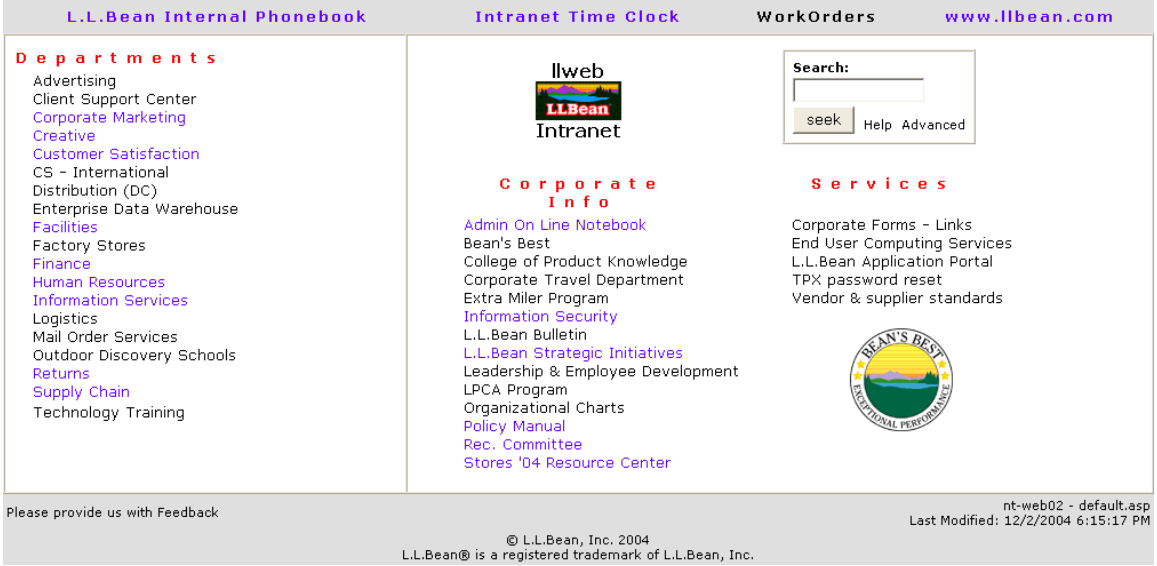

Pictured: Basic building details include the building's name, address, and hours for the office and phone lines; a photo; and the main number and extensions for reception and security. More detailed information is available through the context-navigation options on the right.

Good intranet designers are inventive and determined. They don't give up when presented with a challenge. The L.L.Bean designers worked together through barriers they faced, employing creativity and ingenuity to create an intranet that readily informs and communicates.

## BACKGROUND

The L.L.Bean intranet has had a long life—and, like most corporate intranets, it began humbly in the mid 1990s and grew organically. "When something new was needed, a subject matter expert or admin added it with [Microsoft] FrontPage," says Leah Fitch, lead intranet designer. "Initially, there was no use of CSS or metadata, and all development was done in FrontPage using *Normal View*. Each department employed unique and often hodge-podge designs."

# 10 Best Intranets: L.L.Bean




Pictured: The original L.L.Bean intranet homepage. The page's purpose was to provide access to all of the department sites and some important company information.

Pictured: An example of an old stand-alone department site with a completely different look and feel—and no way to navigate to the corporate intranet.

Pictured: Another stand-alone department site on the old intranet.

The HR site slowly became the go-to place for corporate information relating to employee benefits and offerings. "It also grew organically, with more and more links added to the homepage," says John Vincent, intranet administrator.

# 10 Best Intranets: L.L.Bean

HR
Serving the people of L.L. Bean

What's NEW Calendar Search

HR's Products & Services for YOU

Phone #'s Policy Manual Facts &Figs LLB Home

*Click on the words to get the info you want!*

askHR askhr@llbean.com

Call askHR ( ) or email askhr@llbean.com any time.

The askHR staff will be available during regular business hours, Monday through Friday 8 a.m. to 4:30 p.m., and will return off-shift calls and emails promptly.

- Access my 401(k) account on the Web

Or connect by Phone:

TTY for hearing impaired:

From overseas call collect:

Explore

- Access Aetna Navigator medical/dental benefit and health information

Aetna

**CALENDARS**

- Holidays
- Corporate events

**THE BUSINESS**

L.L.Bean STRATEGIC SI 2005 INITIATIVES

- Marketplace reports
- Org charts
- Today's call volumes
- Call volume forecasts
- Web site orders by hour

Help Wanted Job Postings

RECREATION COMMITTEE

Forms Central! Printable company forms

**COMPENSATION & BENEFITS**

- Borrowing company vehicles for business use
- Employee assistance program (EAP)
- Employee discount
- Employee footwear program
- Employee shopping guide
- Employee Store
- Employee Use Room
- Flexible Benefits Program
- Holiday gift
- Leave of absence from work
- METPAY insurance information
- Performing Through People
- Profile change codes
- Recreational Facilities Rangeley / North New Portland
- Recreation Committee
- Referral award programs
  IS jobs / ODS jobs / Job Specific
- Relocation
- Retirement plans (see Flexible Benefits Program)
  - L.L.Bean Projected Pension Estimate Worksheet
- Service award program
- Severance pay
- Subaru VIP Program
- The Work Number
- Time away from work - Leave of absence
- Travel safety
- Tuition reimbursement program

Performing through People

- Year End Pay Administration
- Year-round, three-step process
- 3-level performance rating scale
- Performing through People brochure

Frontline Leader Initiative

- Frontline Supervisor Calibration Matrix
- Senior Supervisor Calibration Matrix
- Guide to applying the leadership competency model

Core Competency Models

- Frontline Supervisors
- Senior Supervisors

**AT YOUR WORKSTATION**

- Outlook email
- Information security policy & standards
- Internet use guidelines
- Annual Regulatory and Video Display Terminal (VDT) Training [powerpoint]
- Worksite stretch break program

- Leadership Development
- Resource library
- Tuition reimbursement program

**FACTS & FIGS**

- 90th anniversary celebration
- Bean's Best
- Borrowing company vehicles for business use
- Cafeteria hours
- Conference room etiquette
- Directions to company locations
- Dress code - business casual
- Employee counts
- HR phone lists by dept. & area / alphabetical
- Org charts
- Parking policy from security
- Reference policy
- Retail store openings
  - Tysons Corner Center, VA July 28, 2000
  - Columbia, MD May 4, 2001
  - Marlton, NJ August 16, 2002
  - West Lebanon, NH July, 2005 re-opening
- Suspicious package & substance protocol
- Walking trails in Freeport
- Work cancellation telephone line

**EMPLOYMENT**

- Employment
- Contractor and consultant hiring guidelines
- Internship/Co-Op program
- Referral award programs
  IS jobs / ODS jobs / Job Specific
- Relocation
- Job Posting Waiver form

**EMPLOYEE HEALTH**

- Disability Management
- Employee Health home page
- Employee assistance program (EAP)
- Wellness offerings

**EMPLOYEE SAFETY**

- Safety home page
- Safety procedures
- Stretch break program
- Travel safety
- Annual Regulatory and Video Display Terminal (VDT) Training [powerpoint]

- Information for HR (password protected)

Resources for HR to share information and process transactions

TOP

Pictured: This screen from the old site highlights the mixture of fonts, icons, and green text links, as well as a long, two-column scrolling page that kept most of the key information below the virtual fold.

## 10 Best Intranets: L.L.Bean

By 2001, L.L.Bean had become a billion-dollar company, but rather than having a centralized corporate intranet to support it, it had only a homepage that linked out to a variety of disparate department sites. "The primary role of the intranet administrators at the time was to maintain the status quo and to support the Web publishers—over 200 of them," says Vincent.

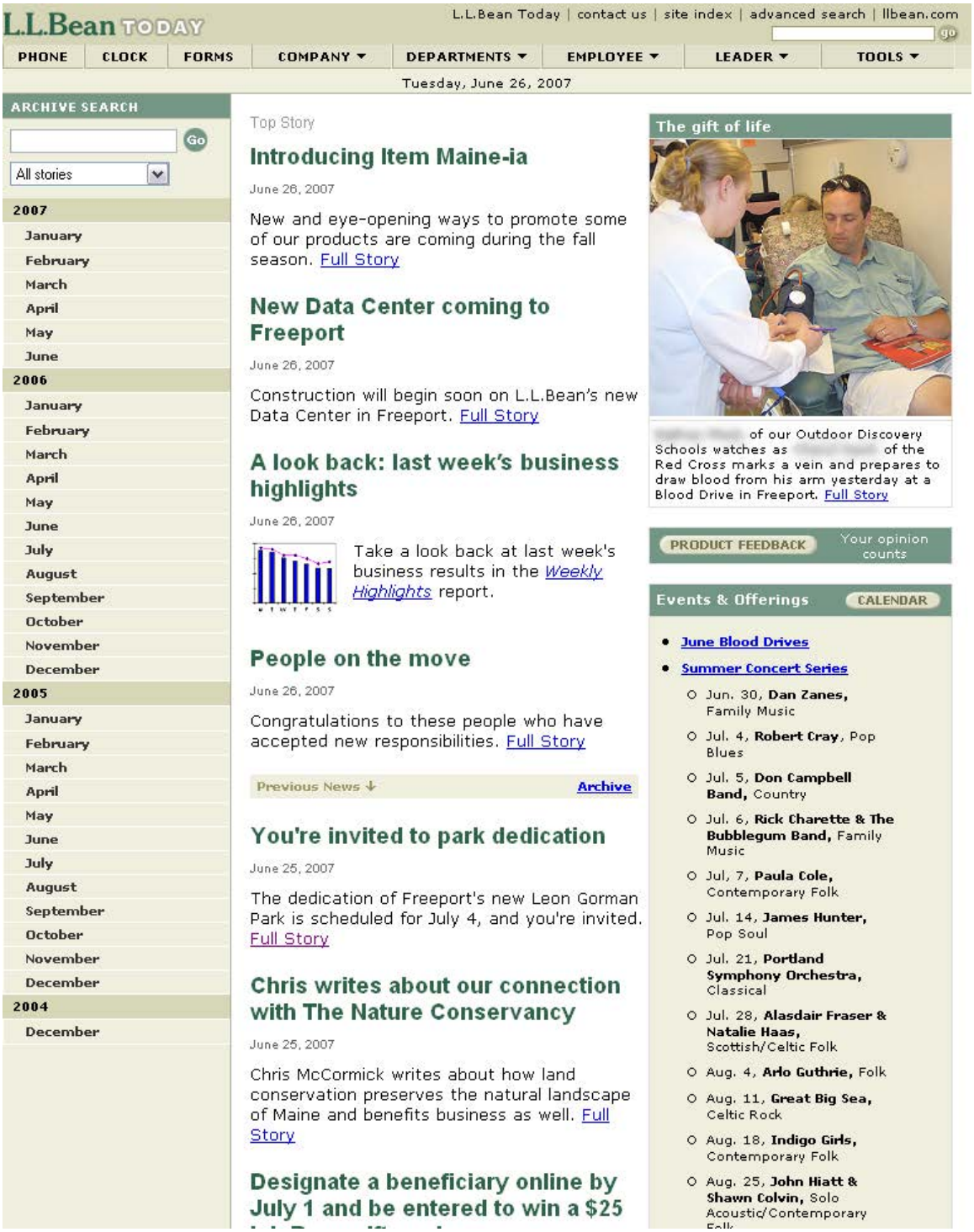
In June 2004, the communications department was reorganized and Fitch was brought on to maintain the current site and to address increasing internal Web design needs from across the organization. “At the time, there was no formal process and requests were done without any task analysis, user studies, or prototypes,” she says. “The requests were simply built and launched. I campaigned with the director of the department at the time to formalize the discipline of intranet design and Web design."

As a designer with extensive Web design and user testing experience, Fitch began to advocate for the adoption of formal Web production processes and introduced the concept of usability methods to the organization. Up until that time, the team had no formal training in user-centered design.

“I advocated to send the current staff to training and seminars and eventually was made the leader of the group,” says Fitch. “I put in place standard operating procedures and brought in more up-to-date tools for building sites. I also demonstrated the various usability methods beginning with paper prototypes.”

Under her guidance, the team proceeded to do an inventory of corporate information. After an initial categorization was completed, the team created a more structured homepage layout with drop-down menus. The new homepage contained news articles, top navigation, left navigation, and search.

## 10 Best Intranets: L.L.Bean




Pictured: "This was one of our first redesigns of the original company homepage," says Fitch. "The page became branded as 'L.L.Bean Today' where users could read the daily news, see current events and offerings, and begin to start using global navigation. The global navigation linked users to the old information and site designs."

## 10 Best Intranets: L.L.Bean

In 2006, the current intranet design team was formed and tasked with redesigning the HR department site's content into a corporate intranet for all L.L.Bean employees. Its mission was defined as “unifying the ‘intra-mess,’” as Linda Carew, the project manager, affectionately called it. It was through their efforts that formal Web production processes, usability methodologies, and Web writing standards were implemented. Intranet development became a formal discipline within the department—and, for the first time, within the company.

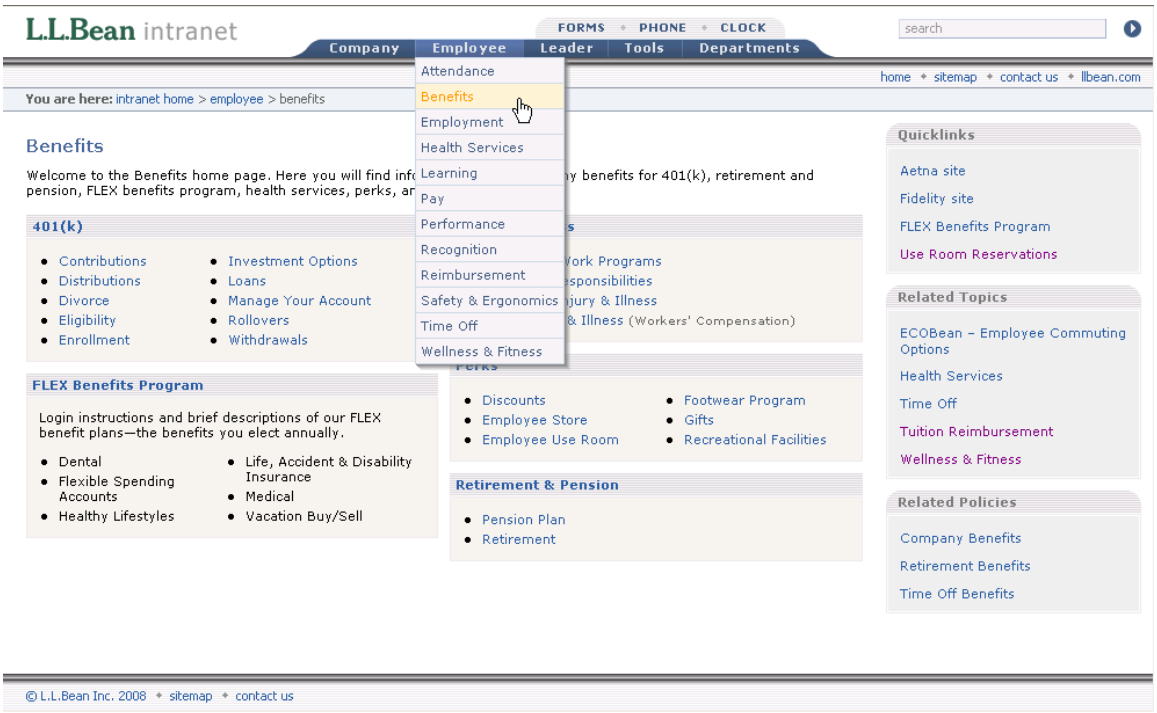
### Finding Inspiration

In 2005 and 2006, members of the intranet team attended a number of usability conferences, most notably the NN/g Usability Boot Camps in New York and San Francisco, and the Adaptive Path User Experience Week in Washington, DC.

“We came away energized and armed with knowledge to begin a formalized/structured process for Web development,” says Fitch. “Having attended these sessions gave us more credibility and the language to get buy-in and support from management. Each step of the process produced results that enlightened management and further reinforced the importance and value of thorough user testing at each phase.”

The project to develop the current site (featured here) began in June 2006 after a planning phase. “The L.L.Bean intranet represented in this entry is the result of over a year of field studies, card sorting, user testing, and Web development,” says Fitch.

It was launched in August 2007.




Pictured: A screen showing how the user would navigate using the global navigation to a category page. The top navigation bar allows the user to navigate to the main sections and departments, search the intranet, and access forms and the site map. Categories are organized under the main tabs of *Company*, *Employee*, *Leader*, *Tools*, and *Departments* using a Milonic drop-down menu. There is only one level of drop-down; through testing, the team learned that users found secondary fly-out levels unwieldy.

## INTRANET TEAM

The L.L.Bean intranet team consists of three intranet designers, an intranet administrator, and a project manager. "We also had a dedicated content editor who oversaw the assigning and editing of old and new content," says Fitch. The intranet team is part of the Corporate Communications department within HR.

HR manages the intranet portion represented in this report; departments throughout the company manage their own separate department sites. "It was the support of the HR senior leadership team that paved the way for a comprehensive redesign to bring together all corporate information," says Fitch.

Pictured: (left to right) Linda Carew, Laurie Gonyea, Leah Fitch, John Vincent, and Melissa Coleman.

### Budget

"Budget? What budget?" says Fitch mockingly. "There is no project budget aside from salary."

She explains: "Our intranet administrator's skills in both front and backend coding enabled us to creatively design dynamic content using flat file data. Our designers are committed to abide by all usability standards. Everything is created by hand (templates, prototypes, testing materials) or coded using Dreamweaver. Our project manager quickly embraced the process—becoming the primary communication liaison between team, stakeholders (testers, HR, help desk, news), and our sponsors."

"Portal and CMS solutions are always on the table, and we're hopeful that it will be realized someday," she says. "However, it has never made the cut when the final budgetary decisions are made. We continue to look for ways to upgrade our technology."

## GOALS AND CONSTRAINTS

The primary goal of the intranet is to organize content into the three meaningful groups selected by users:

- **Employee information** including perks, learning opportunities, wellness offerings, jobs, health, and benefits.
- **Company information** including org charts, corporate initiatives, business information, building information, and policies.
- **Tools** including forms, tutorials, and links to online applications.

## Constraints

As discussed earlier, the team works with no project budget, just staff. With no budget, they have to do both discount usability *and* discount programming.

### Everything is Hand-Coded

Currently, the L.L.Bean intranet has no CMS, portal solution, relational database, or other dynamic backend systems to automate workflow. All content is entered by hand into its appropriate template using Dreamweaver.

"During the redesign, we coded about 1,250 Web pages, and used programming to dynamically generate another several hundred pages in the *Building Information* section," says Vincent.

The lack of dynamic back-end systems is not apparent to the users, as gauged by this user comment from the IT team:

> *"I am curious as to what software was used to design the new Intranet? The look and feel reminds me of some of the CRM applications I have worked with in the past and am curious if this is the case here. The new layout is much more organized and the nav is more intuitive. Keep up the great work, you are very much appreciated!"*

And the intranet team's reply?

> *"No fancy software… all hand-coded by our team!"*

### No Usability Tools

**"**There are no usability tools in-house such as Morae, or a lab with closed-circuit video," says Fitch. All testing was done either locally at the user workstations or in a conference room with a single computer for one-on-one prototype testing. And all testing materials were created and compiled by hand.

## TIMELINE

| REDESIGN PROJECT TIMELINE | |
|---|---|
| **2006** | |
| **April–June** | • Project planning: established project charter, vision, goals, and a high-level timeline; identified resources and assessed risks |
| **July–August** | • Card sorting (began June 29)<br>• Began content categorization |
| **September** | • Field studies<br>• Categorization continued |
| **October** | • Official kick-off meeting with management; resources committed<br>• Management presentation on card sorting and field study results (how users think)<br>• SMEs and editor identified and trained to edit content for Web presentation<br>• Categorization continued |
| **November** | • Finished content categorization<br>• Paper prototypes (four revisions)<br>• Began content development by SMEs as identified in initial |

| | |
|---|---|
| | rounds of paper prototype testing |
| **December** | • Planned wireframe build (HTML code and template development) |
| **2007** | |
| **January** | • Finished content development<br>• Began building wireframe v.1 |
| **February** | • Developed communication plan<br>• Built wireframe v.1 and entered content |
| **March–April** | • Tested wireframe v.1 (three revisions) |
| **May** | • Designed complex sections, including news, building information, forms page, learning, and lending library |
| **June** | • Tested wireframe v.2 (two revisions) |
| **July** | • Look-and-feel (design) phase<br>• Beta launch (to a group of employees from various departments)<br>• Implementation of a QA process<br>• QA testing and bug fixing |
| **August** | • Tested wireframe v.3 (one revision)<br>• Designed scavenger hunt<br>• Launched site (August 13) with online scavenger hunt to help orient users |
| **2008** | |
| **February** | • Post mortem user testing to compare success rate data with original site testing; results: 52% improvement in time needed to locate page |

## USERS

L.L.Bean's intranet users included operational users who mostly access the intranet from kiosk locations and non-operations staff that have computer access. The user roles break down as follows.

**Operational.** Most operational users have limited computer access via kiosks and include:

- Customer service (has computer access)
- Distribution
- Returns
- Manufacturing
- Facilities
- Retail/outlet
- Security

**Non-Operational.** Most non-operational users have computer access and include:

- HR
- Merchandising
- Finance
- IT
- Marketing
- Creative
- E-commerce
- Supply chain
- Direct to business
- Public affairs

## USER TASKS

The L.L.Bean intranet content includes everything from the daily news and calendar of events to detailed information about benefits, health services, employee and leader development, and wellness and fitness. Employees use the site to access information about benefits, perks (such as discounts, recreational facilities, and lotteries), and forms (including those for reimbursement, equipment requests, wellness, and learning classes).

The following are among the site's most popular features:

- Daily news articles
- Company information and sales data
- The phone directory (this independent site is the most frequently used online resource, and isn't administered by the intranet team)
- The *Building Information* section

The team determined the most popular features based on information from a variety of resources, including:

- *Contact Us* feedback forms
- Survey results
- Unsolicited comments/e-mails to intranet team
- User testing (all phases)

# 10 Best Intranets: L.L.Bean

L.L.Bean intranet

FORMS • PHONE • CLOCK

search

Company | Employee | Leader | Tools | Departments

home • sitemap • contact us • llbean.com

You are here: intranet home > company > news > room for one more?

News
- Bean Scene Archive
- News Archive
  - 2008
    - January
    - February
    - March
    - April
    - May
    - June
  - 2007
  - 2006
  - 2005
  - 2004

## Room for one more?
### Daily image

June 16, 2008

The members of this carpool are (l-r) [illegible], [illegible], [illegible] and [illegible].

Saving money on gas is just one of the reasons these Information Services employees drive into work together nearly every day.

"In a small way, we're helping to reduce carbon emissions," says [illegible], six-year carpooling veteran. "It's also a pleasure to have three or four days off a week from our personal battles with downtown Portland traffic. And, while I won't say it's the best ride-share perk, we all like that close-in 'Carpool Only' parking space in front of the LL Building."

The three men had been 'pooling' for a while when they realized they did indeed have room for one more. They went online to gomaine.org and found that [illegible], one of their co-workers in the LL Building, had registered as someone interested in joining a carpool. Check out the gomaine web site for statewide information about how you can get connected.

[illegible]'s advice to carpoolers: "Be flexible — on occasion, such as vacation time, you'll need to make adjustments. Secondly, be sure all your co-workers' phone numbers are stored on your cell phone. Also, if it's in your comfort zone, allow each other access to online calendars. Bottom line: It makes all the sense in the world."

**We'd like to hear from you**
Send us your comments and suggestions. Contact the Editor

page top

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Pictured: The *Daily image* news page. News items for each day are highlighted on the homepage. When users click an item, they enter the *News* section, which has a tree-menu navigation and archives organized by day, month, and year.

# 10 Best Intranets: L.L.Bean

L.L.Bean intranet

FORMS • PHONE • CLOCK

Company | Employee | Leader | Tools | Departments

search

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You are here: intranet home > employee > benefits > perks

**Benefits**

- 401(k)
- FLEX Benefits Program
- Injury & Illness
- Perks
  - Discounts
  - Employee Store
  - Employee Use Room
  - Footwear Program
  - Gifts
  - Recreational Facilities
- Retirement & Pension
- Contact

## Perks

Unique benefits for L.L.Bean employees to obtain discounts on company products, borrowing outdoor equipment, insurance and automobiles.

### Discounts

This section provides instructions for how to use your L.L.Bean discount and discover other discount opportunities:

- Employee Discount
- Discount Offers (External)

### Employee Store

Located in Freeport, Maine, the Employee Store provides the opportunity to purchase usable merchandise at substantial savings.

### Employee Use Room

The Employee Use Room provides a means for all eligible employees to borrow a wide variety of our products at no charge (except for canoes and kayaks) from the Davis Warehouse in Freeport, Maine.

### Footwear Program

Discount on unlimited pairs of select footwear, socks and innersoles that should improve foot comfort and reduce lower extremity injuries on the job.

### Gifts

This section provides information on the discretionary holiday gift and one-time congratulatory gifts the company gives in recognition of employee contributions.

### Recreational Facilities

Camps and tent sites, located in Maine on Rangeley Lake and in North New Portland, are available for eligible employees to use.

page top ▲

**Phone Numbers**

| | |
|---|---|
| Employee Store | ##### |
| Employee Use Room | ##### |
| Open camps | ##### |

**Quicklinks**

- Use Room Reservations

**Tools & Forms**

- Discounted Footwear List
- Employee Recognition, Prizes & Awards form
- Recreational Facilities Payroll Deduction form
- Recreational Facilities Use Agreement

**Related Topics**

- Company Retiree Discounts
- Outdoor Discovery Schools
- Recognition

**Related Policies**

- 9.1 Employee Purchase Discount
- 9.2 Holiday Gift
- 9.3 Company Gifts
- 9.4 Employee Store Procedures
- 9.5 Employee Use Room

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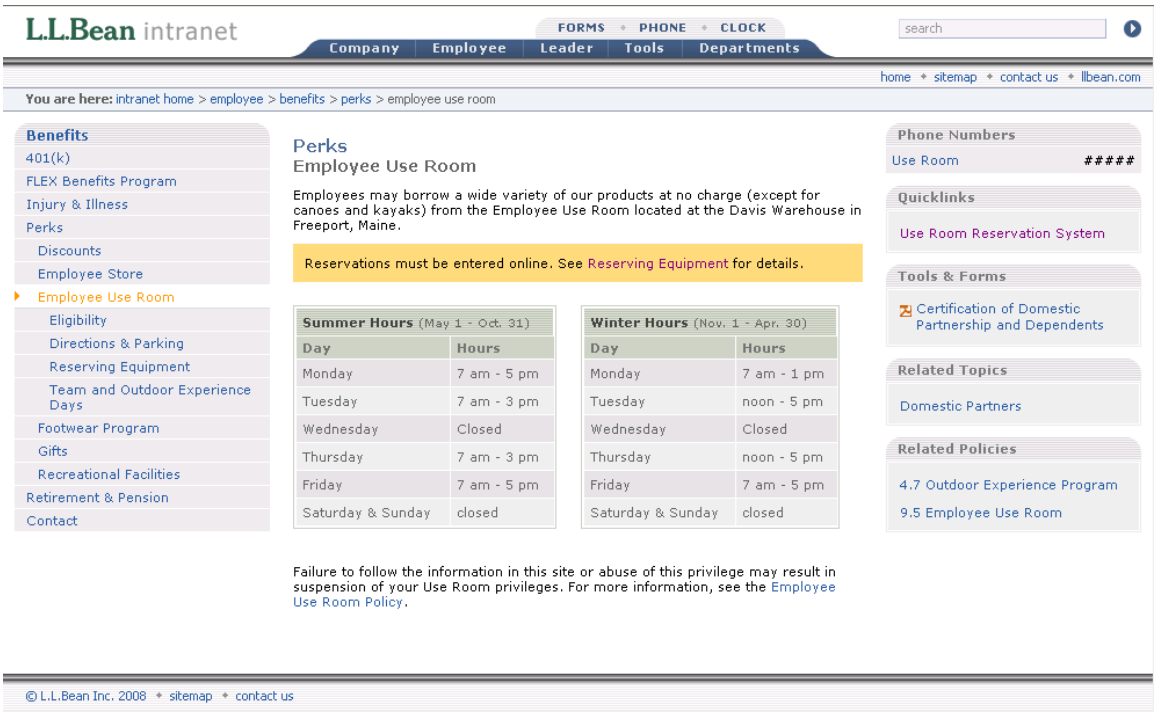
Pictured: The *Perks* content section within the *Benefits* section.




Pictured: The *Perk* section's *Employee Use Room* topic. The left navigation lets users drill down into specific categories.

## DESIGN PROCESS AND USABILITY ACTIVITIES

The impetus for starting the intranet project was a reorganization of the HR department. This reorganization centralized the HR function into one location, rather than having it spread throughout the company. "We needed employees to be able to self-serve in terms of accessing information—therefore, the need for a corporate intranet," says Fitch.

"There was a commitment among the team to develop a user-focused, user-centric website," she says. "We were faced with the challenge of finding, organizing, and surfacing company- and employee-focused content that was hidden in a vast network of independent sites—the 'intra-mess.'"

Fitch also notes that, in addition to being hard to find, content was often repetitious, outdated, and contradictory.

The team began their work by drawing up a list of the 15 most common help desk (HR and IT Support) calls and turning those issues into user tasks. With those tasks as a starting point, they visited employees in various parts of the organization to see how they were trying to accomplish the tasks.

"We found that the old intranet content was not organized from the end user's perspective: it was organized from the content owner's perspective," says Fitch.

Most of the content on the site was print content that had just been repurposed for the Web without any thought to how it would be used online. "Usually," she says, "this was done by an admin or someone who had no HTML or Web design training and was doing this as a side project."

The content was not written so that users could easily scan a page to find relevant content and it wasn't written in a style conducive to task-based findability. "Content was written in long blocks of paragraphs, with a lot of philosophy statements and few

headings," says Fitch. The content was department-centric and there was no contextual information or global navigation.

"Sometimes, you would link to a Web page that lacked a title in the browser, title on the page, and local navigation back to where you had linked from," she says. "Many were documents saved off as HTML format and uploaded as is."

And search wasn't very useful because there was little metadata and the content's basic composition was problematic. "Sometimes," Fitch notes, the content was simply "memos without any titles."

Fitch took those initial findings (along with card sorting results) to the project sponsors to show the value of the testing methods and to demonstrate that her team could change the site to help people be more productive.

"We had several sponsor meetings showing the data, with slides and photos showing the constraints and the hurdles people had to go through to find information," she says. "Those presentations helped to convince our sponsors to let the team take the time needed to do things the right way.

"They were convinced of the value of following a formal Web process and usability methods," she says.

## Usability Methods

Usability methods that the team employed included: card sorting, field studies, categorization, paper prototype testing, a Web writing tutorial for SMEs, and digital wireframe testing. "We had a dedicated conference room for display of materials that allowed sponsors to see the scope of the project," says Fitch.

They taped the cards to the wall to help them see the information and to help with moving topics around. The team left the information on the walls throughout the month-long process; doing so proved to be a great way to generate enthusiasm and conversation about the project.

Pictured: The intranet team analyzing the topic cards and building the categorization.

## Card Sorting: Learning the Vernacular

The team compiled an inventory of all HR and company content, and then wrote the content topics on index cards. The team went to all areas of the company—both operational and non-operational—and watched as groups of employees organized content and labeled the groupings. "This helped us define contextual and related content for the coming prototypes," says Fitch.

"We found that card sorting is more effective when done in groups of two or more people," she says. "Individuals can get stuck whereas a group can debate and come to an agreement on the various ways something can be organized."

Through this exercise, the team learned about how people talk about certain topics. For example, certain company offerings, such as the employee discount, the employee use room (where employees can borrow outdoor equipment), and recreational facilities (including L.L.Bean's several camping facilities) were mixed in with other benefits, like health insurance and 401(k). "All tested groups, irrespective of business unit, grouped these topics under the benefits category in a section called *Perks*," says Fitch. "So, we went with it—and it has been very successful."

Pictured: Two groups of two users sort through topic cards while an intranet designer observes.

## Categorization

The team spent more than a month organizing and cataloging the card sorting results. As Fitch explains, team members did this in several steps:

- They created a visual matrix of posters that contained similar category names and the cards associated with them.
- They counted how many times a card appeared under a category. When a card was distributed more-or-less equally under two categories, the content was duplicated in both places or a related topic was added.
- A categorization document was created that served as the basis for preparing paper prototypes.

## Usability Studies at the User's Site: Words Matter

More traditional field studies are a great method for learning about users, the tools they use, and the tasks they choose to do. In true field study methodology, facilitators follow users around as they work; they give users no tasks, but simply observe. The L.L.Bean team decided to do some usability studies, but at users' work sites in the field.

There are a few reasons for doing this kind of task-based study:

It's good to see people work through tasks on their own machines and workstations, in their own environment.

It's often easier to get usability testers to agree to participate if the tester comes to them. (This isn't always possible when users don't work for the same company, but is a special bonus of testing intranets.)

If you really want to watch people using the interface and doing particular tasks, you usually have to ask them to do it and give them good, non-leading tasks. If you just let people do what they want, they might not use features you need to test at a particular time in the development cycle.

In the case of L.L.Bean, there was no set space, such as a lab, to run the studies.

To conduct test sessions, the L.L.Bean team:

- Identified users from all business unit areas
- Created tasks based on the most common issues users experienced while trying to retrieve information on the intranet
- Created observer templates
- Visited users in their workplace and, during tests, they used stopwatches to time tasks, counted clicks, and recorded where users went to try and retrieve the information to complete their tasks

The team created tasks from the 15 most common issues handled by the HR and IT Support help desks. This is an excellent way to make use of the complaints and questions that help teams are all too familiar with. Members of Fitch's team went to user workstations to watch how employees used the intranet to find the information. They tracked time and user comments, paying particular attention to the nomenclature people used. For example, one of the tasks was "find the time off policy for attending a funeral of a colleague." This information was located in the *Bereavement Policy*. When browsing the list of policies, Fitch says users skipped right over the word "Bereavement."

"We watched testers using search to locate this information. Not once did the term 'bereavement' get entered in the search field," she says. "The term commonly used was 'death.'" Search yielded no relevant results because 'death' wasn't in the policy content.

The testers asked users why they had skipped over the word "bereavement." Most said they weren't familiar with the term. "We changed the policy title to 'Death and Bereavement,' and enhanced the metadata keywords to include dead, death, and funeral," says Fitch.

By making these changes, users were able to find the content. For the team, this effort solidified the importance of writing for the Web and choosing the types of words that users themselves actually use.

"This task also confirmed the importance of how content must be written for the Web," says Fitch. However, even the few users who originally located the correct policy were unable to find the time allotment for this type of funeral because the company's policy on it was buried in long blocks of text. Fitch's team solved the problem by using a table. "Once we placed the information into a table, users found the information quickly," she says.

**Eligibility**

**Time Off and Pay**

In the event of the death of a spouse/qualified domestic partner or child, the employee is paid for up to 2 weeks absence (based on their normal work schedule) as needed. If any other member of the immediate family dies, the employee is paid for up to 3 working days. In the event that more than one member of the immediate family dies at approximately the same time, the employee is paid for up to 2 weeks absence (or 10 working days) as needed. For purposes of this benefit, other members of the immediate family include: parents, brothers, sisters, grandparents, grandchildren, great grandparents, as well as in-laws and step-relatives in each of these groups.

In the event of a family member's death during an employee's regularly scheduled vacation, or over a company paid holiday, bereavement paid time may be allowed, and the lost vacation days or holiday rescheduled.

Bereavement pay for the eligible period will be based on the employee's scheduled work hours for the days absent.

Employees on a Leave of Absence from the company are not eligible for bereavement pay.

Pictured: The company's bereavement policy as it appeared on the site prior to user testing and content changes. Note the blocks of uninterrupted copy. During testing, users began at the top, but then jumped over the information they were looking for because the content wasn't scannable.

**Time Off and Pay**

In the event of the death:

| Relationship to Deceased | Paid Time |
|---|---|
| Spouse/qualified domestic partner or child | Up to two weeks absence (based on their normal work schedule) as needed |
| Immediate family include:<br>• parents<br>• brothers<br>• sisters<br>• grandparents<br>• grandchildren<br>• great grandparents<br>• in-laws<br>• step-relatives | Three consecutive working days |
| If more than one member of the immediate family dies at approximately the same time. | Up to two weeks absence (or 10 working days) as needed |
| Close family member (not considered "immediate" by policy definition) | Time off to attend the funeral |
| Fellow employee or former L.L.Bean employee | Time off to attend the funeral |
| Friend | Unpaid time off may be granted to attend the funeral service |

In the event of a family member's death during an employee's regularly scheduled vacation, or over a company paid holiday, bereavement paid time may be allowed, and the lost vacation days or holiday rescheduled.

Bereavement pay for the eligible period will be based on the employee's scheduled work hours for the days absent.

Pictured: The revised Web copy for the bereavement policy, after testing with users. The content is now in an easily scannable table design. During re-testing sessions, users found the time-off information immediately.

Pictured: A user with a small office required the intranet designer/observer to sit on the desk to conduct the test session.

## Paper Prototype

The L.L.Bean team made a paper prototype using PowerPoint. They then conducted four rounds of paper prototype testing with three groups of five test subjects. This iterative testing and design helped them refine things to best match users' mindsets. "We quickly noticed that users preferred content to be clearly delimited within boxes," says Fitch. "This gave them a clear sense of where a subject started and ended. They used the paper prototype primarily to verify categorization and nomenclature of topics (headings and what to call links), and to identify content needs (what was missing or in need of editing). This last usage, says Fitch, helped the team define the SME list.

Three team members facilitated the test sessions:

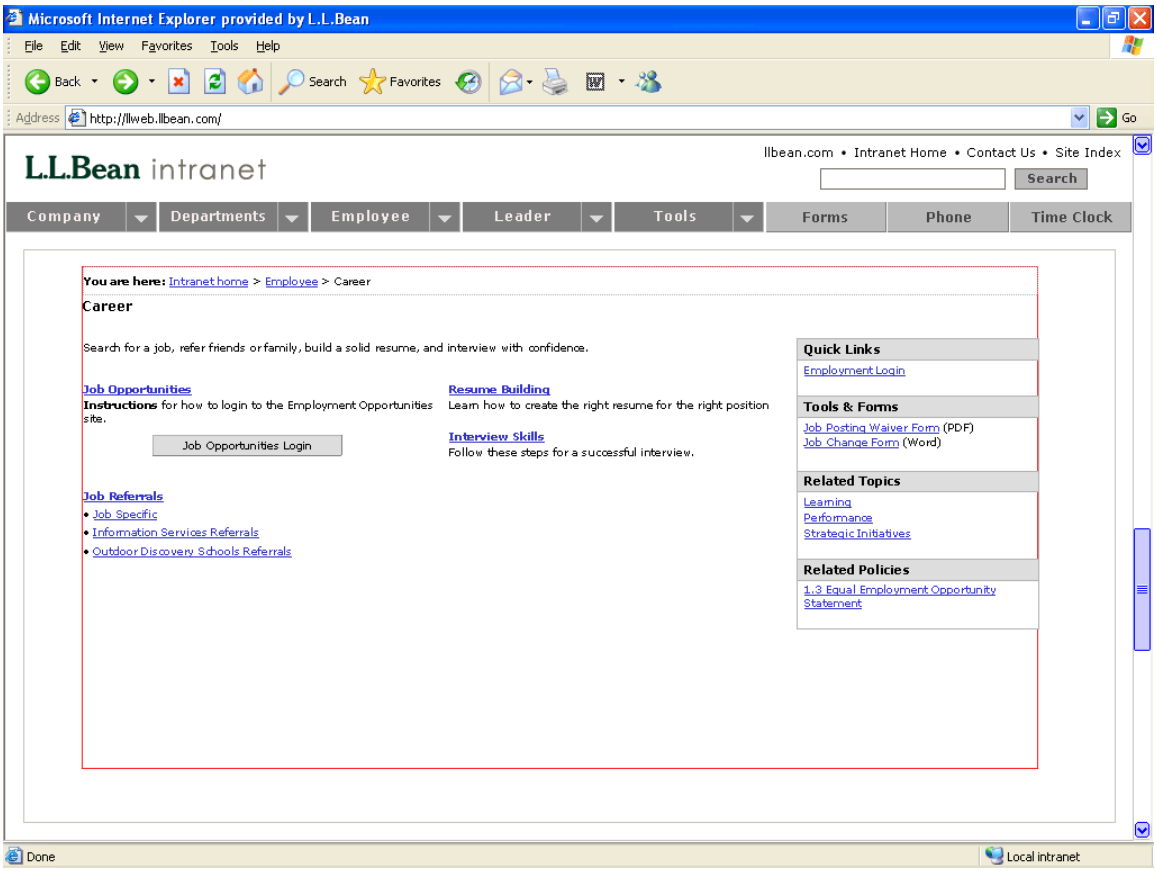
- One observer served as the "human computer" presenting the screens or drafting new ones on the fly. This observer had a stack of blank paper and a pen in addition to all the prepared screens. As Fitch explains, "if the tester chose a path for which we had no screen prepared, the 'computer' would present a *Please Wait* screen with a little clock icon and proceed to draw the new screen and then present it to the user."
- One observer facilitated and recorded where the user "clicked"
- One observer recorded all user comments.

Pictured: Prototype test. Team member Melissa Coleman (in light blue t-shirt) acted as the "computer" and sat to the left of the test user (in red). Two other intranet designers (to the right of the test user) also conducted the session, while the project manager (across from the test user) observed.

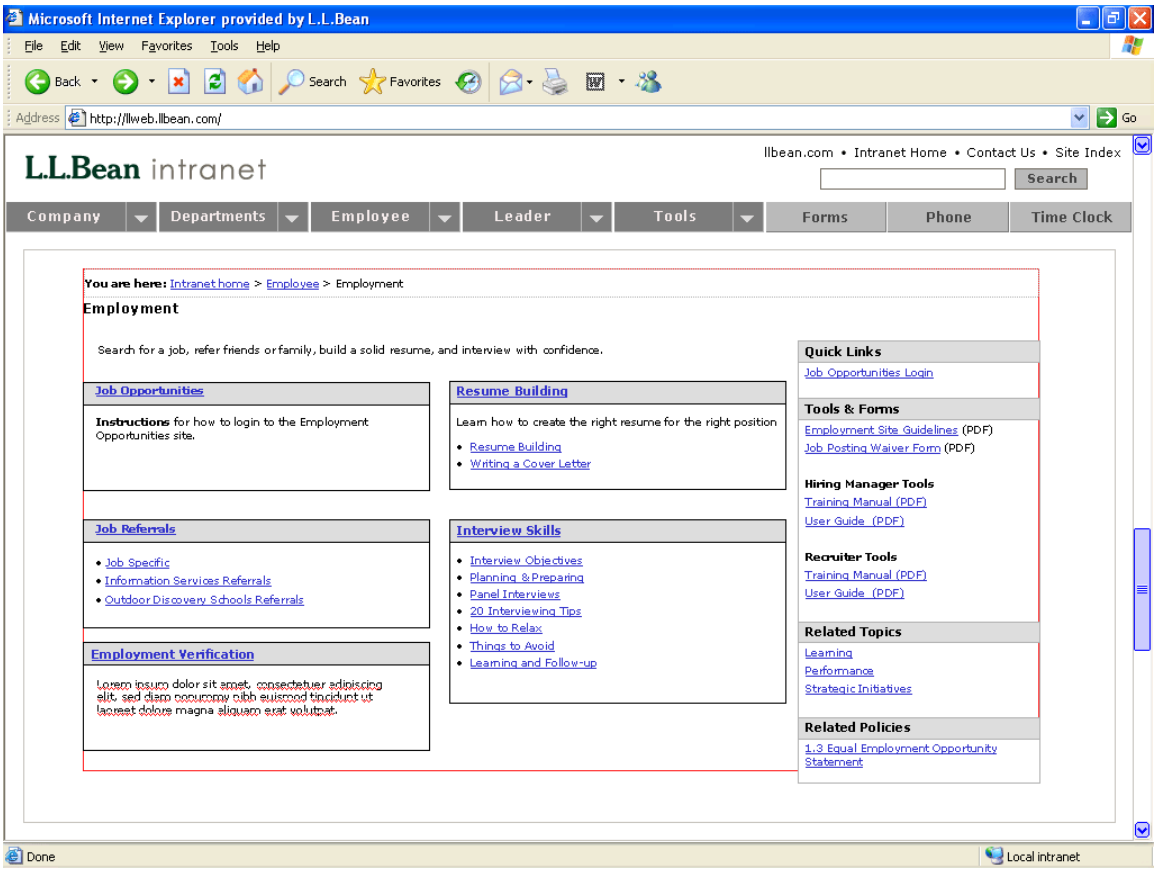
"The paper prototype helped reorganize some of the topics and categories," says Fitch, "and was a quick way to introduce new interface elements."

Beyond the IA issues, the paper prototype served, like many of the other tests, to identify issues with the existing content. It highlighted missing, incomplete, or poorly written content. "Most topics lacked clarity, some contained contradictory statements, and several just repeated the same statement over several paragraphs," says Fitch.

# 10 Best Intranets: L.L.Bean




Pictured: An example of the first paper prototype of a page that offered employees information about job opportunities.




Pictured: The last paper prototype round of testing. Designers added boxes to more clearly define various topic sections. The team changed the section's name—from "Career" to "Employment"—based on user feedback.

## Content Development

Once all major site issues were ironed out, the team identified SMEs. They then tasked these SMEs with rewriting and editing existing content sections and creating new sections that had been identified as missing during the paper prototype phase.

Nearly all the team's usability methods had pointed to problems rooted in the content, so it made sense to conduct workshops on Web writing. They held a two-hour Web writing seminar with the SMEs to train them in a new workflow and help them learn the basics of better Web content writing.

A corporate communications editor was assigned to review content and establish a workflow whereby SMEs would submit content, have one-on-one meetings to review it with the editor, make edits, get approval from leadership, and resubmit. While this was going on, the Web designers were able to focus on testing.

## Writing Content Takes Longer Than You Think

Through this content development process, the team learned a valuable lesson: Content writing takes time. "Content development takes much longer than you think," says Carew, "especially if your SMEs are doing their own jobs full-time."

"Getting content on time has always been a big issue," she says. "To minimize this, we had management hold meetings with content owners [the SMEs] in their areas

and make it a (temporary) expectation to accomplish this task as part of the intranet project."

"In the wireframe phase, SMEs were presented with tests results," she says. "Frequently, there was need for additional edits to old and new content which had to be validated through further testing."

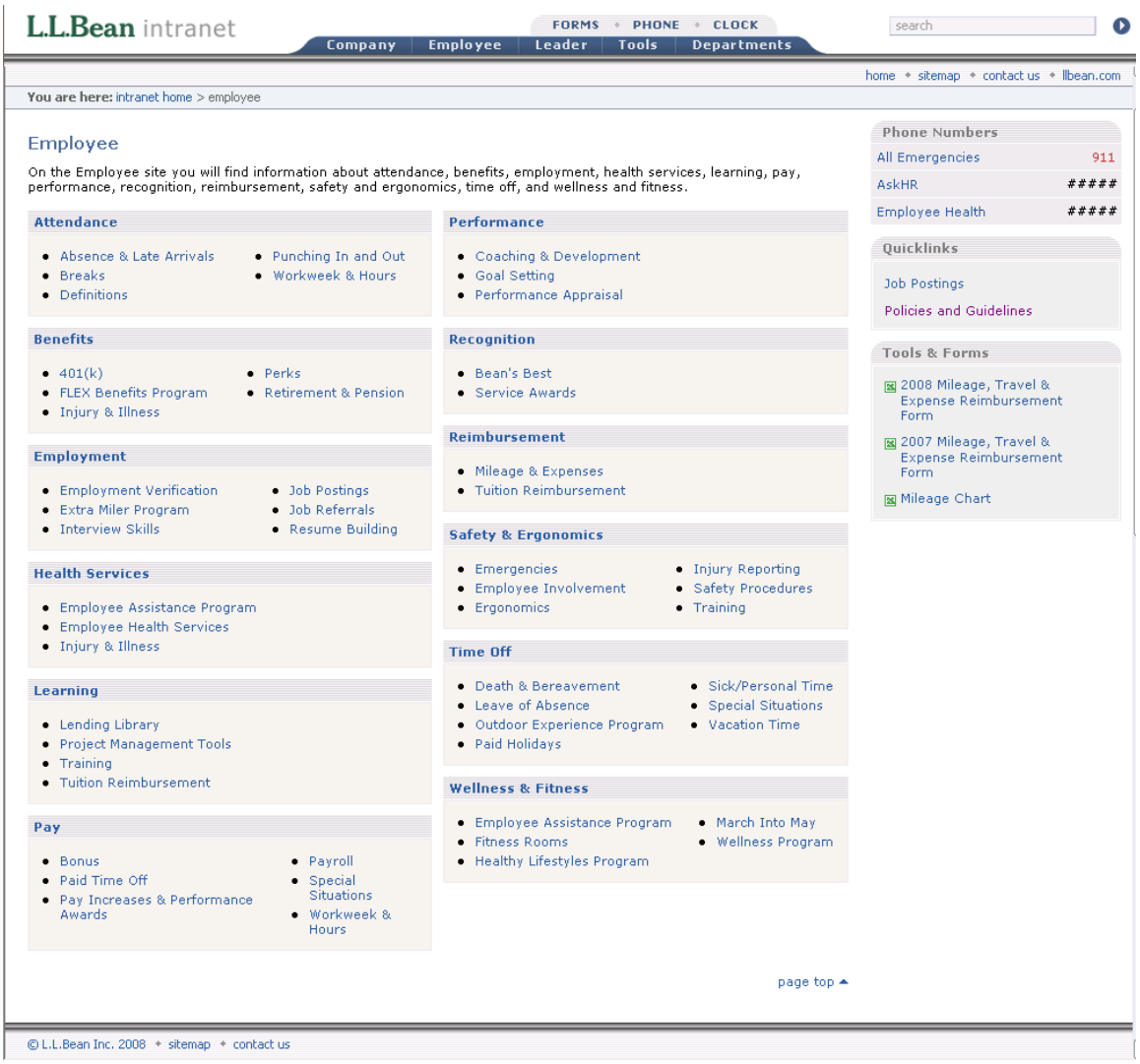
Carew notes that while SMEs were available for rewrites throughout the wireframe phase, content writing was never a part of people's jobs. From the outset, it was understood that the intranet project would need outside people to handle the content writing duties. Still, part of the intranet communications editor's job was to revise the SMEs' writing.

Even with this additional support, the timeline was still delayed due to the vast amount of content that needed to be tested or retested. Oftentimes, the content category organization was changed based on the paths users took to find the information during testing or "because content needed revising for completeness or clarity," says Carew.

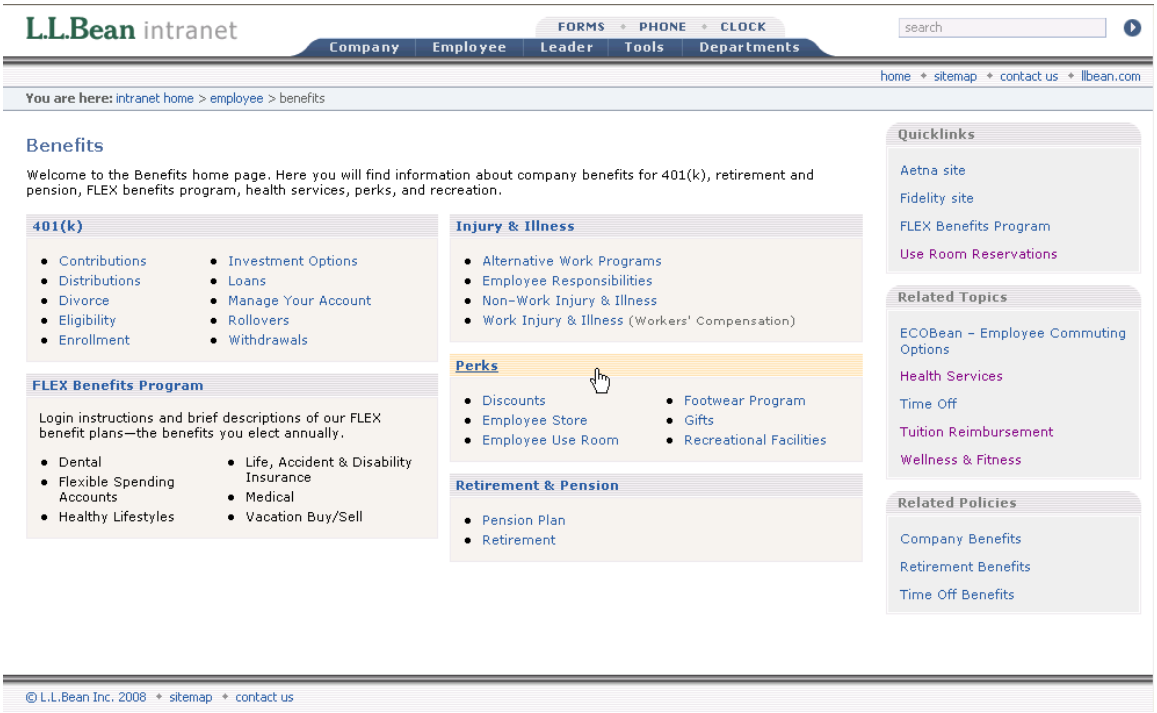
"Once we were satisfied with how a topic was organized and that the content was clear and complete, we then proceeded to test other areas of the site," she says.

These loops consumed time and required resources to address the findings before they could move on.

# 10 Best Intranets: L.L.Bean




Pictured: A top-level *Employee* overview page. All overview pages function as a sitemap for their content and exist for each top-level category (*Company*, *Employee*, *Leader*, *Departments*, and *Tools*). The overview shows all the main sections within a category, along with links that let users jump directly to a section.




Pictured: The *Benefits* overview page. Category overview pages show the sections and the next level down in the site structure with topic pages as links. Here again, users can go to the section homepage or drill down into a topic page.

## Wireframes: Testing Content

The intranet team began building an HTML wireframe and entering all new and edited content into the templates. “While we debated using a digital HTML wireframe over the standard PowerPoint wireframe,” says Fitch, “the benefit was that the HTML version replicated the user experience of the medium exactly. During testing, users could click on links and go to the relevant pages.”

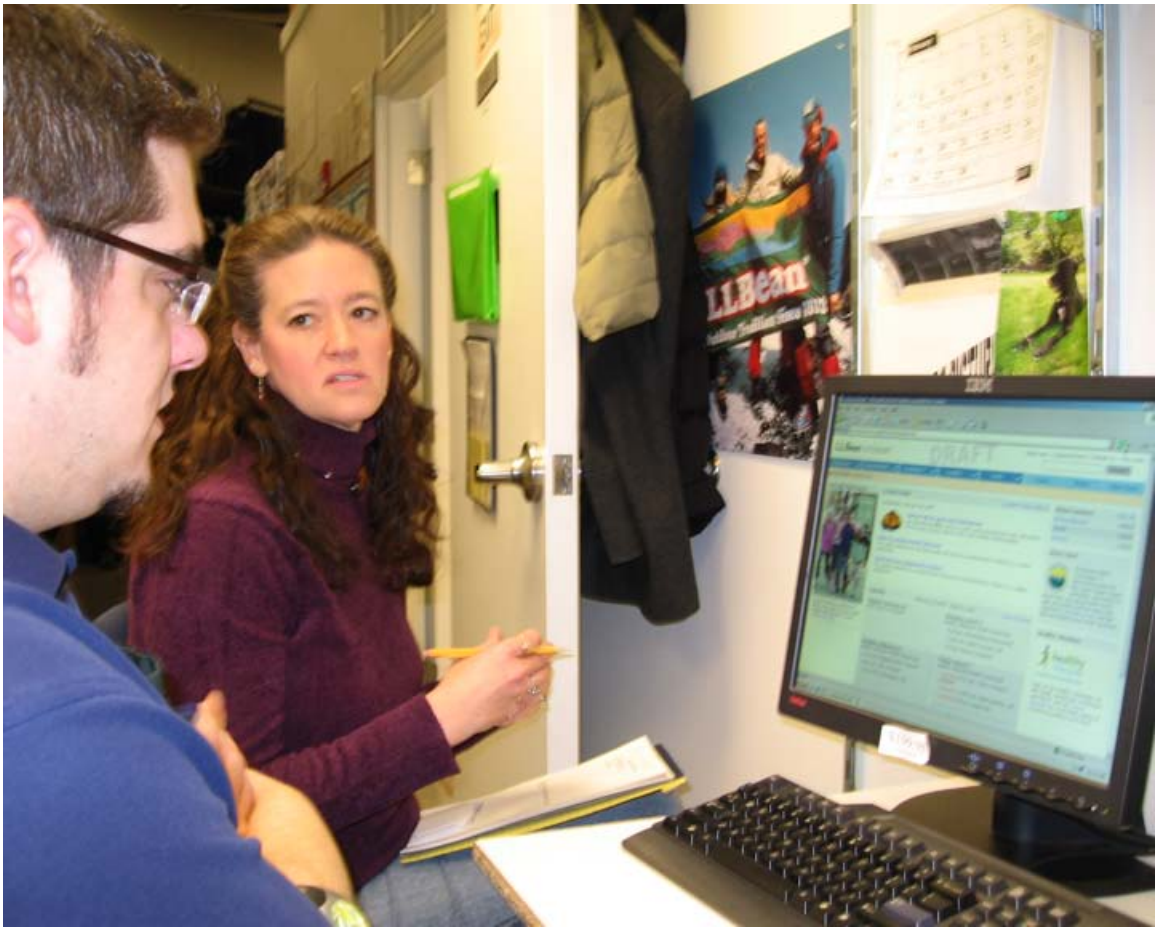
Rounds of wireframe testing let the team test as much of the content as possible. They conducted four rounds of iterative testing, changing tasks and the design as needed, as they went along. “For example, we started out with monochrome design and slowly added colors to sections of the interface or introduced interface elements,” says Fitch. “Through it all, new tasks were being created for testing as old tasks were dropped once our goals for success were achieved.”

Throughout the testing, the team invited the SMEs to review the test results so they could understand first-hand why users failed tasks based on how the content was structured. This helped the SMEs understand how users think, as well as the value of reorganizing content to help users. “This helped us get support from the content owners and approving managers,” says Fitch.

# 10 Best Intranets: L.L.Bean

Pictured: The HTML version of the wireframe for the section shown in the paper prototypes screens above.

Pictured: A revised version of the same wireframe. Among the changes were to remove the *Quicklinks* box and add a *Job Postings* category (because it was important for employees to read the log-in instructions for this section), as well as to change titles and replace the bullets with a blurb description.



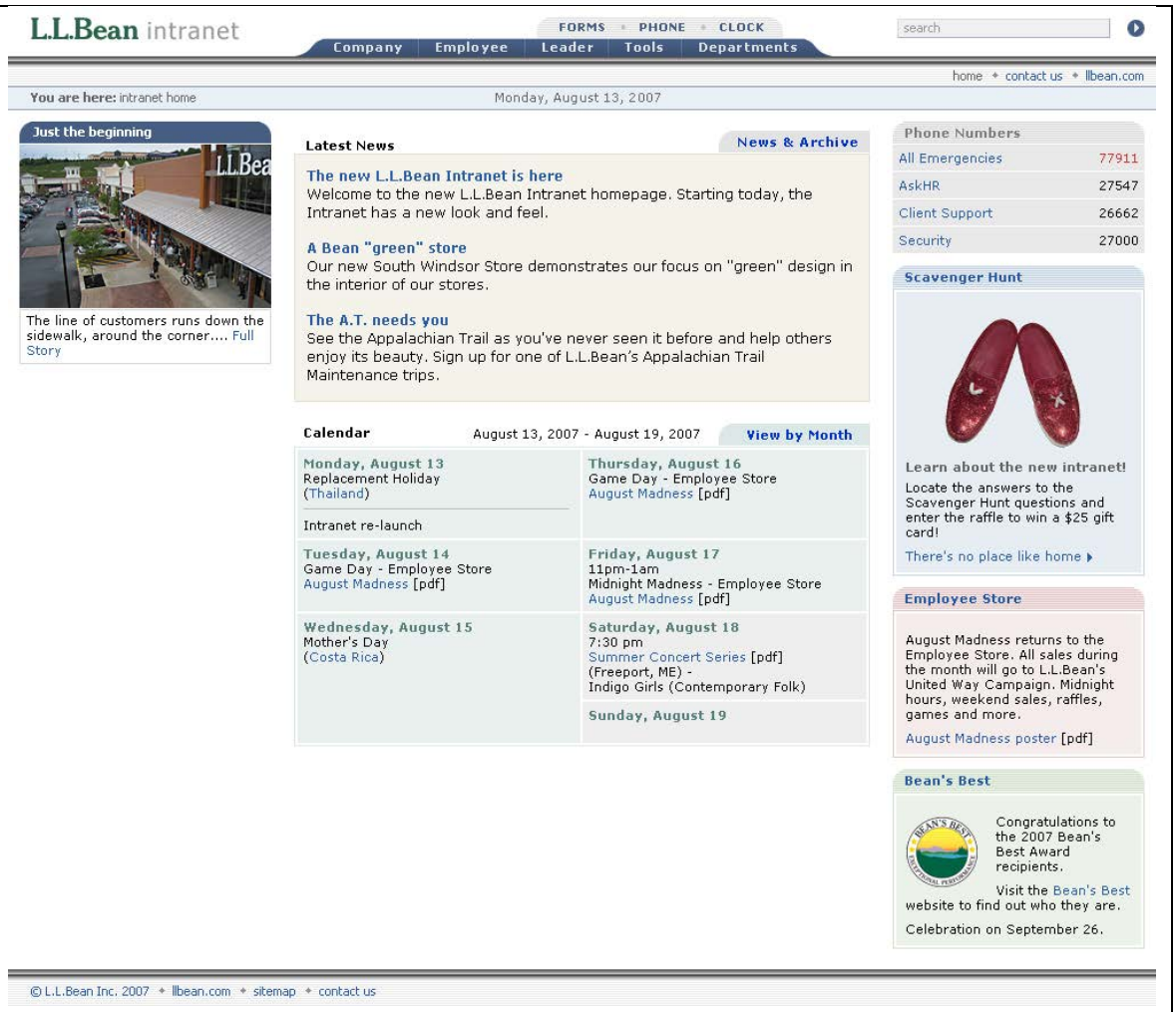

Pictured: An L.L.Bean intranet designer conducts a test of the HTML wireframe in the small back room of a retail store.

## Launching with a Scavenger Hunt

When the team went live with the new site, they included an online scavenger hunt for the first month. "The communication motto was, 'There's no place like home,'" says Fitch. The scavenger hunt posed questions to users about topics that were scattered throughout the new IA. To be successful, users had to find the correct location of the question's answer. A blue box containing a pair of ruby slippers would indicate that they'd found the answer and would pose the next question. At the end of the scavenger hunt, participants were entered into a $25 gift card drawing. "This helped expose employees to the new content organization in a playful way," says Fitch.

Feedback was also collected via the scavenger hunt completion form. User feedback was very supportive of the new site. Over 600 employees participated in the scavenger hunt and 247 submitted feedback.

| SCAVENGER HUNT TESTIMONIALS<br>USER FEEDBACK FROM THE SCAVENGER HUNT INCLUDED THE FOLLOWING COMMENTS: |
|---|
| *"This was a very nice learning experience."* (Retail Store, Albany NY) |
| *"Thank you—this was actually helpful. It seems to be a bit more user friendly than previous upgrades. :)!!"* (Retail Store, Freeport ME) |
| *"The 'improved' intranet is very easy to use...thank you!!!"* (Outlet Store, Williamsburg VA) |
| *"That was really fun and interesting. I learned a little along the way! I hope I win! I like the new set up!"* (Call Center, Portland ME) |
| *"Great exercise!! Encouraged me to get more familiar with the website (wonderful redesign btw)."* (Call Center, Bangor ME) |
| *"What a wonderful tool! As a Quality Coach who is taking on a PC role this Peak, I am glad to have taken the few moments necessary to familiarize myself with the new intranet in this fun way!"* (Call Center, Waterville ME) |
| *"After the shock of seeing a new page I discovered how easy it was to move around and find things. Thanks."* (Order Fulfillment Center, Freeport ME) |
| *"That was an interesting Scavenger Hunt. Some things took a little hunting to find, but it was fun. Thank you!"* (Peck Building, Lewiston, ME) |
| *"Really very easy to locate info...great job."* (LL Building – IT Department, Freeport ME) |




Pictured: This is what the new intranet homepage looked like on launch day in August 2007. The team used the *Scavenger Hunt* (right column) to help users find information and learn about the site.

## URL AND ACCESS

The L.L.Bean intranet is accessed at http://llweb.llbean.com/.

The intranet homepage is the default for most users, though some operational departments set their department site as the default. Access outside the firewall is available to users with remote access. Remote access users are given a SecurID card with a random digital password to gain access to the intranet.

Operational areas and retail employees have access to public computers. These kiosks are available to employees who don't have an office station and work on the floor, including employees in manufacturing, packing, returns, and retailing positions. The quality of kiosks is not consistent from area to area. Most of the kiosks don't have printing capabilities.

Pictured: A public access computer for employees who don't have a dedicated workstation. Kiosk station quality is inconsistent in operational areas; this station, for example, sits near a conveyor belt and the old monitor's screen display is purple.

Pictured: The kiosk stations in this call center are an example of some of the better kiosk set-ups at the company, but they don't provide employees with any privacy.

## TECHNOLOGY

The intranet uses Microsoft Internet Information Services (IIS) 6.0 running on Windows Server 2003. There is one authoring server and two production servers. L.L.Bean uses Active Directory for directory services, and Exchange/Outlook for messaging.

The intranet administrator does a lot of client-side scripting using JavaScript and there is advanced form validation and interactive interfaces using DHTML.

Server-side programming is done using ASP/VBScript, and flat-file database connections use ActiveX Data Objects (ADO). There is some use of client-side ADSI scripting to leverage Active Directory for personalized content. For example, one page lets home office users view a large Web video that is inaccessible to users in remote stores who access the intranet over a WAN with much lower bandwidth connections.

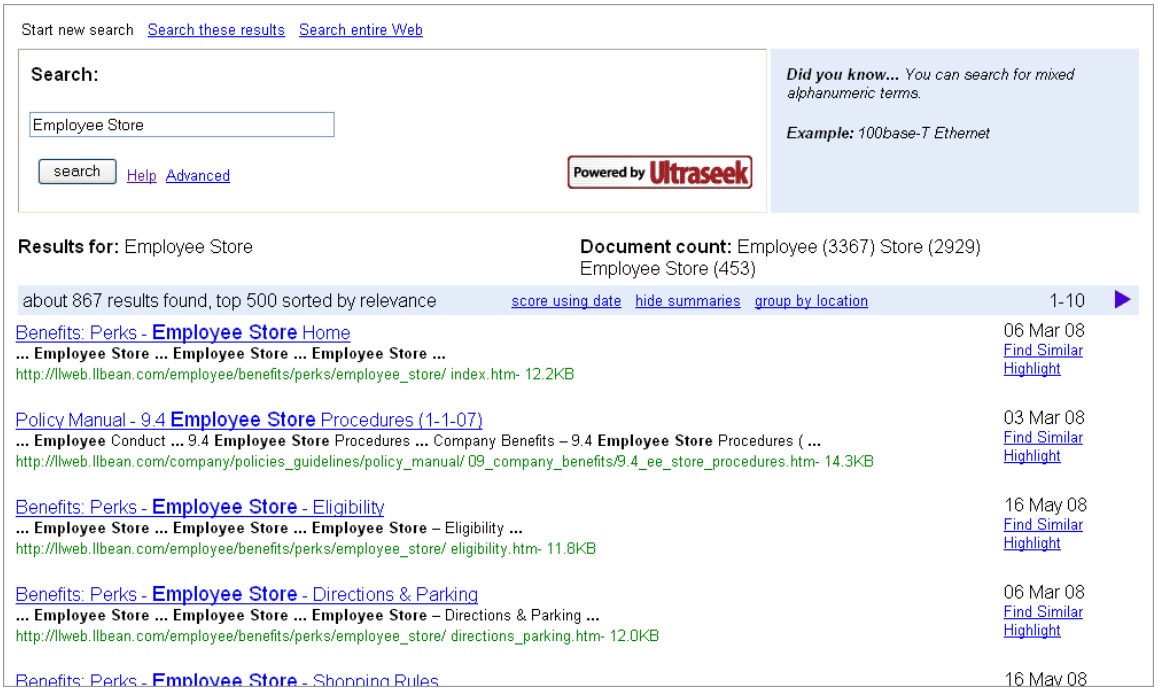
Dreamweaver is used as an editing tool; the site administrator also uses FrontPage to support some legacy department sites. Photoshop is used for design and prototyping, and Flash for developing motion graphics.

## SEARCH

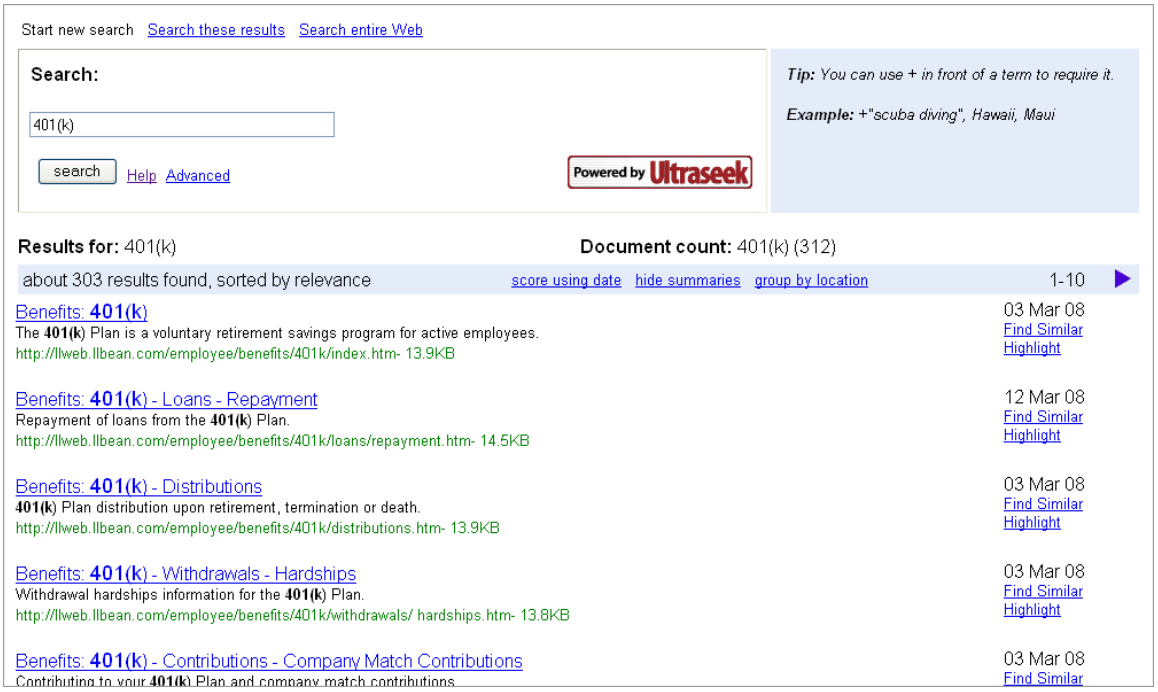
L.L.Bean's enterprise search is powered by Ultraseek 5.7.0 running on Windows Server 2003. The entire intranet (including the corporate content and department sites) has 18,700 pages and documents indexed. Several thousand more are password-protected pages that Ultraseek cannot index.

"We optimized the quality of our search results by enhancing metadata where needed and modifying Ultraseek administrative settings, such as indexer weights and spam detection thresholds," says Vincent. "We also altered the default look and feel of the search results to more closely resemble those of industry leaders Google and Yahoo."

### Sample Search Results Screens




Pictured: Search results for "Employee store," which is one of the most popular search requests.




Pictured: Search results for "401(k)." Adding metadata with keywords, page titles, and descriptions has pushed the pages they want employees to find to the top of the search results.

## FEATURES

Because the site's goal is to help users get information and get it fast, it makes sense that the site's "killer app" is an information tool—that is, the *Building Information* tool. "All the studies conducted with users indicate that people really loved this section of the site," says Fitch.

The tool lets users from different areas, cities, and buildings can quickly get information about a building or conference room they need to visit, either by searching or following an easy-to-use interface. The information is stored in a single flat-file that contains directions, phone number, room features (TV, VCR-DVD, network enabled, and so on), and room capacity, as well as information on specific rooms, such as the fitness room's hours and description.

Because the site doesn't use a relational database, it presents information dynamically using backend flat-file databases. "The use of a backend data source makes the content easy to update and maintain," says Vincent.

If the team had had to hard code this section, he says it would have required hundreds of hard-coded pages that would have been challenging to update. "Instead, the page for each building or room is dynamically generated from the flat file, which is easily updated in one place."

The same flat-file technique was used to provide easy-to-maintain lists of classes, such as those in *Leader Development* and *Wellness & Fitness*; books in the Lending Library; and past winners of the Bean's Best award. In these cases, descriptions are streamlined. Also, class lists include a sortable schedule that lets users view all current classes and sort them according to individual preferences.

# 10 Best Intranets: L.L.Bean

L.L.Bean intranet

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You are here: intranet home > employee > wellness & fitness > wellness program > classes > schedule

- Wellness & Fitness
- Employee Assistance Program
- Fitness Rooms
- Healthy Lifestyles Program
- March into May
- Wellness Program
  - Classes
    - Activity Classes
    - Eligibility
    - Health Education Classes
    - Registration
    - Schedule
  - Fitness Incentives
  - Individual Training Programs
  - Onsite Massage Therapy
  - Stretch Break Program
- Contact

## Wellness Program
### Classes – *Schedule*

Click column headings to sort.

| Class | City | Location | Days | Dates | Time | Cost |
|---|---|---|---|---|---|---|
| Beyond Toning | Brunswick | Brunswick Cafeteria | M/T/Th | hiatus | 2:45 - 3:30 pm | $50 |
| Beyond Toning | Freeport | Double L Fitness Room | M/W/F | 6/16 - 8/20 | 7 - 7:45 am | $50 |
| Fit in a Flash | Portland | Portland Pallet Facility | M/W/F | 6/16 - 8/20 | 11:15 am - noon | $50 |
| Fit in a Flash | Portland | Northport Fitness Room | M/W/F | 6/16 - 8/20 | 12:15 - 1 pm | $50 |
| FitPilates | Lewiston | Peck Fitness Room | T/W/Th | 6/24 - 8/28 | Noon - 1 pm | $60 |
| FitPilates | Lewiston | Peck Fitness Room | T/Th/F | 6/24 - 8/29 | 7 - 8 am | $60 |
| FitPilates | Freeport | Returns Fitness Room | M/W/F | 6/23 - 8/29 | 2:30 - 3:30 pm | $60 |
| Fitness Fusion | Lewiston | Peck, Great Falls Room | T/Th | hiatus | 4 - 5 pm | $60 |
| Mid-Summer Triathlon, Duathlon or Aqua-Bike Training Program | Freeport | Double L, Royal Coachman | M | hiatus | Noon - 1 pm | $75 or $50 |
| Middle Eastern Dance | Freeport | CCC, Freeport | W | hiatus | 3:30 - 4:30 pm | $30 |
| Pilates | Freeport | OFC | T/Th | ongoing | 11:30 am - 12:15 pm | Free |
| Pilates | Freeport | CCC, Freeport | T/Th | 7/8 - 9/11 | 11:15 am - noon | $50 |
| Pilates on the Ball | Freeport | CCC, Freeport | M/W/F | 7/7 - 9/12 | 11:30 am - 12:15 pm | $75 |
| Pilates on the Ball | Freeport | OFC | M/W/F | ongoing | 12:30 - 1:15 pm | Free |
| Retiree Exercise Class | Freeport | Freeport Fitness Room | M/W/F | ongoing | 9 -10 am | Free |
| Smoking Cessation | Freeport | | T | Call Karen Knapton | 11 - 11:45 am | Free |
| Ten Weeks to Fiscal Fitness! | Freeport | OFC, Summit Room | Th | Call Jamie Anderson | 11:30 am - 12:30 pm | Free |
| Weight Watchers | Portland | Product Training Room | W | 5/21 - 7/23 | Noon - 1 pm | $145 |
| Weight Watchers | Freeport | OFC | Th | 5/6 - 7/22 | 11:30 am - noon | $145 |
| Weight Watchers | Freeport | Main St. Break Rm., Retail | Th | 4/17 - 7/3 | 3:15 - 4:15 pm | $145 |
| Weight Watchers | Freeport | CSOC, Caribbean Basin | T | 6/24 - 9/9 | Noon - 1 pm | $145 |
| Weight Watchers | Brunswick | Brunswick TBD | M | hiatus | 11:30 am - 12:15 pm | $145 |
| Weight Watchers | Freeport | Returns TBD | W | hiatus | Noon - 1 pm | $145 |
| Weight Watchers | Freeport | Surace, Oxford South | T | 4/23 - 7/2 | Noon - 1 pm | $145 |
| Weight Watchers | Lewiston | Peck, Great Falls Room | Th | 5/13 - 7/29 | 11 am - noon | $145 |
| Weight Watchers | Lewiston | Peck 2nd shift TBD | W | hiatus | 6 - 7 pm | $145 |
| Weight Watchers | Portland | Northport 2nd shift TBD | T | hiatus | 7 pm | $145 |
| Workout Medley | Freeport | Taylor Fitness Room | T/Th/F | 6/17 - 8/22 | 7 - 7:45 am | $90 |
| Workout Medley | Freeport | Surace Fitnes Room | T/Th | 6/17 - 8/21 | 8 - 8:45 am | $60 |
| Workout Medley | Freeport | Taylor Fitness Room | M/W | hiatus | 5:15 - 6 pm | $60 |
| Workout Medley | Freeport | Taylor Fitness Room | M/W/F | 6/16 - 8/22 | 4:30 - 5:15 pm | $90 |
| Workout Medley | Portland | Northport Fitness Room | T/Th | 6/17 - 8/21 | 4:15 - 5 pm | $60 |
| Yoga | Freeport | Beanery, Freeport | Th | 6/20 - 8/28 | 5:15 - 6:45 pm | $50 |
| Yoga | Freeport | Surace, Ladyslipper | T | 6/24 - 8/26 | Noon - 1 pm | $50 |
| Yoga | Freeport | Surace, Ladyslipper | Th | 6/26 - 8/28 | 4 - 5 pm | $50 |
| Yoga | Northport | Northport, Pine Room | W | hiatus | 4:30 - 5:30 pm | $60 |
| Yoga | Freeport | Double L, Royal Coachman | F | 6/20 - 8/29 (no class 7/4) | Noon - 1 pm | $50 |

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Pictured: The Wellness & Fitness class schedule is powered with the same flat-file technique used to provide easy-to-maintain lists of Leader Development classes, books in the Lending Library, and past winners of the Bean's Best award. In these instances, descriptions are streamlined and a sortable class schedule lets users view all current classes and sort them according to individual preferences.

## LESSONS LEARNED

The design team learned many lessons during the redesign project.

**Linda Carew, project manager:**

**Set yourself up for success.** "Spend the time upfront needed to define the project and the roles of key players, create a vision, set objectives, assess and reduce risks, and get commitment for the resources needed. Create a project plan with the key people who will do the work."

**Invest in your SMEs.** "Train them in how to write for the Web. Educate them on how users think, and what's important to them. It's the gift that keeps on giving, because they'll use what they learn in future projects."

**Manage change.** "It is a complex project, with all of its levels of impact, moving parts, and people who will need to have input all over the company. Having project resources with expertise in managing change helped immensely. And a Web design process that focuses on the end-user makes the implementation of the change much easier."

**Celebrate along the way.** "The project took us a bit more than a year. I think it's important to celebrate along the way—at milestones, or sometimes just for small successes. And plan something special at the end to recognize all the effort that went into it."

**Involve the project sponsors.** "The involvement and buy-in of sponsors is a critical success factor for this kind of project. They need to understand what success looks like and be comfortable with the approach you take. They make the project a priority for the resources involved. Keep them informed, and find ways to generate excitement at each phase of the project."

**Laurie Gonyea, intranet designer:**

**Trust that you will get good data. "**There may be phases that you are not excited about doing, but in the end you get really good information."

**Find—and appreciate—support for your project.** "I was really pleased to feel the support behind this project. This was the first time we were actually given the opportunity to do each phase—minus the full design phase—but to actually have sufficient time to do paper prototyping, card sorting, and all these different rounds of testing. People stepped up to the plate and took time away from their jobs to come to us, or we went to them. I just really felt supported."

**Account for data entry time.** "When we scheduled the paper prototype testing, the data entry was not properly taken into account by all members of the team. You need to build that time into your timeline."

**John Vincent, intranet administrator:**

**Designate a project room. "**Having a dedicated project room where we could have the card sorting and categorization data up on the walls was very important. It enabled our sponsors to see the scope of the content and helped them to understand the value of the time we were spending. The space became a visual representation of all of the work we were doing."

**Designate a project manager.** "A comprehensive intranet redesign project absolutely requires a dedicated project manager. There is so much project management work to be done—from working with sponsors, to scheduling user

testing, along with producing PM deliverables like a project charter and status updates."

**Melissa Coleman, intranet designer:**

**Organize information based on user choices.** "When categorization is based on user choices rather than departmental or political hierarchy, the resulting site is much easier for everyone to use. Sometimes, the way the site is organized changes the way the company is organized, resulting in better productivity all around."

**Design before code.** When working in a hard-coding environment with a static left and right nav, it's very important to get the categorization and content completely done before starting to code. If the content is final, the coding will be quick and easy. If the content is not final, there will be a lot of time-consuming changes to the code."

**Leah Fitch, lead intranet designer:**

**Results from actual users provide the most powerful leverage.** "We really profitted from getting the top help desk issues, making tasks out of those, going to the users' place of work and watching them try to accomplish those tasks—timing them and counting the number of clicks. Then using the results of those field study tests as leverage to convince sponsors and upper management of the value of following a full-fledged Web process. Being able to show a visual presentation (PowerPoint) to sponsors with pictures of the employees performing tasks and their testimonials as they struggled with them was very powerful."

**Test, test, and test some more.** As Fitch notes, perhaps the most important lesson learned comes from the team's motto: "If you are going to have a user-focused site, you need to do user testing throughout the project!"

## RESULTS / ROI

### Post Mortem User Testing

In February 2008, to verify if goals were achieved, the team repeated the testing tasks with users on the new intranet. The same questions were asked of the users as in the original test sessions. The results of this re-test are shown in the charts below and include:

- 52% improvement in speed
- 28% improvement in the number of clicks
- 21% improvement in success rate

| INITIAL USER TEST SESSION RESULTS | | | |
|---|---|---|---|
| **Task** | **Action Average** | **Average Time** | **Success Rate** |
| Find the company match for your 401(k) contributions. | 10.69 | 2:33 | 69% |
| You've moved to a different town. Find the form to change your address. | 11.85 | 2:47 | 77% |
| You will be applying for a bank loan and the bank will need to verify your employment with L.L.Bean. Find out what to do on the intranet. | 10.08 | 2:38 | 54% |
| A family member has passed away. Find out who qualifies as immediate members of the family. | 12.23 | 3:04 | 54% |
| You heard that L.L.Bean offers Yoga classes. Find the class schedule. | 7.15 | 1:18 | 92% |
| You're adopting a child, which will require extended time away from work. Find out how many weeks away you are able to request. | 8.38 | 2:30 | 85% |
| You have an idea to improve one of our products. Use the intranet to send this idea to the right people. | 17.23 | 3:22 | 0% |
| A close co-worker is struggling with a recent setback (personal or work related). Find resources to help him/her. | 3.92 | 0:34 | 100% |
| You need to send a signed document to Jamie Anderson via interoffice mail. What is her building code? | 3.46 | 0:37 | 85% |
| Find the directions to log in to the *Employment* site. | 5.38 | 0:57 | 77% |
| You work in Freeport and must go to a meeting in the Northport building in Portland. Find the driving directions. | 8.08 | 0:55 | 92% |
| You must go to a meeting in the Androscoggin Rm in the Taylor building in Freeport. Find the directions to the meeting room. | 8.08 | 0:51 | 62% |
| You went to a meeting in the Northport building in Portland from your office in Freeport. You now want to be reimbursed for the mileage. Find out the total approved mileage. | 7.00 | 2:12 | 54% |
| Find information on how to set your goals. | 7.92 | 1:19 | 62% |
| Use the intranet to find out how you can anonymously report suspicious activities. | 10.15 | 2:16 | 38% |
| **Cumulative Average Totals** | **8.87** | **1:52** | **67%** |
| | **Action Average** | **Time Average** | **Success Rate** |

Pictured: Initial user testing task results from tests conducted at the beginning of the design process.

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| POST MORTEM USER TEST SESSION RESULTS | | | |
|---|---|---|---|
| **Task** | **Action Average** | **Average Time** | **Success Rate** |
| Find the company match for your 401(k) contributions. | 4.00 | 0:30 | 83% |
| You've moved to a different town. Find the form to change your address. | 8.67 | 1:48 | 67% |
| You will be applying for a bank loan and the bank will need to verify your employment with L.L.Bean. Find out what to do on the intranet. | 5.17 | 1:20 | 83% |
| A family member has passed away. Find out who qualifies as immediate members of the family. | 5.33 | 0:38 | 100% |
| You heard that L.L.Bean offers Yoga classes. Find the class schedule. | 7.17 | 0:43 | 100% |
| You're adopting a child, which will require extended time away from work. Find out how many weeks away you are able to request. | 6.67 | 1:23 | 67% |
| You have an idea to improve one of our products. Use the intranet to send this idea to the right people. | 10.17 | 1:06 | 83% |
| A close co-worker is struggling with a recent setback (personal or work related). Find resources to help him/her. | 4.00 | 0:40 | 100% |
| You need to send a signed document to Jamie Anderson via interoffice mail. What is her building code? | 4.00 | 0:32 | 100% |
| Find the directions to log in to the *Employment* site. | 5.83 | 0:49 | 100% |
| You work in Freeport and must go to a meeting in the Northport building in Portland. Find the driving directions. | 6.33 | 0:36 | 83% |
| You must go to a meeting in the Androscoggin Room in the Taylor building in Freeport. Find the directions to the meeting room. | 7.50 | 0:43 | 100% |
| You went to a meeting in the Northport building in Portland from your office in Freeport. You now want to be reimbursed for the mileage. Find out the total approved mileage. | 7.50 | 1:19 | 83% |
| Find information on how to set your goals. | 4.50 | 0:29 | 100% |
| Use the intranet to find out how you can anonymously report suspicious activities. | 4.50 | 0:39 | 100% |
| Find the list of paid holidays. | 9.83 | 1:08 | 100% |

| | | | |
|---|---|---|---|
| Some area merchants extend special offers to L.L.Bean employees. Find the list of current offers. | 6.33 | 0:48 | 100% |
| Find out how to get movie tickets at a reduced price. | 9.50 | 1:07 | 83% |
| Find out when the Employee Store is open. | 6.67 | 0:50 | 83% |
| Find guidelines on keeping L.L.Bean system information safe. | 5.50 | 0:54 | 50% |
| Find opportunities where you can help out at company-sponsored events. | 5.83 | 0:48 | 83% |
| If you were new to L.L.Bean, where would you go to learn how to navigate our intranet site? | | | |
| **Cumulative Average Totals** | **6.40** | **0:54** | **88%** |
| | **Action Average** | **Time Average** | **Success Rate** |
| | | | |
| **Average Max** | 10.17 | 1:48 | |
| **Average Min** | 4.00 | 0:29 | |
| | | | |
| **Comparison to Original 2007 Round** | 28% | 52% | 21% |
| **2007 figures** | 8.87 | 1:52 | 67% |

Pictured: Post mortem user test sessions were conducted approximately six months after the launch. As shown here, the team saw significant improvements.

Overall, Fitch says, "The intuitive reorganization of the information makes it much easier for employees to find information and answer questions themselves, rather than having to ask a manager or call AskHR.

"A 52% improvement in the speed of finding information means more productive employees," she says.

The redesign gave users many more navigational options, and they can search with greater success because of the addition of keyword and description metadata.

**User Comments**

Though metrics help make a business case for a redesign effort, often the most compelling results come from user feedback and anecdotes from users about how the site helps them do their jobs better. After the launch of the new site, the intranet team received comments from across the organization. Here are a few examples:

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| USER FEEDBACK ON THE SITE AFTER THE REDESIGN |
|---|
| *"I went looking for information on the new company travel site, thinking that it would be out of date. Well, I stand corrected… Nice job, found what I needed quickly and easily. Just in case no one ever said good job! GOOD JOB!"* (IT user) |
| *"Everyone loves your clean, crisp design and layout."* (IT user) |
| *"Looks great! It's better organized and will probably be easier to use."* (Returns user) |
| *"I think the new design looks GREAT! You've done a fantastic job making the intranet more user-friendly and intuitive, and it looks consistent throughout all channels. I haven't had a chance to go through all of the sections, but so far I really like what I see."* (Retail user) |
| *"Just wanted to let you know the new website is excellent. Very contemporary and easy to find information. Great job!"* (Facilities user) |
| *"The new site looks great, and is very well organized!"* (Merchandising user) |
| *"I just used the meeting room search tool. WOW! I thought I was going to have to go through all the buildings in southern Maine to figure out where my meeting is the morning. I saved so much time I wanted to use it sharing some major Kudos with the intranet team. Thanks for making my morning so much more efficient!"* (HR user) |

# Wal-Mart Stores, Inc.

**Using the intranet:**

Wal-Mart Stores, Inc., (NYSE: WMT) serves customers and members more than 200 million times per week at more than 8,000 retail units under 53 different banners in 15 countries. With fiscal year 2009 sales of $401 billion, Walmart employs more than 2.1 million associates worldwide. A leader in sustainability, corporate philanthropy, and employment opportunity, Walmart ranked first among retailers in Fortune Magazine's 2009 Most Admired Companies survey.

**Headquarters:** Bentonville, Arkansas

**Number of employees the intranet supports:** 1.4 million US associates are authenticated to access mywalmart.com. From its launch in March 2009 to October 2009, 565,510 associates have registered on the site and 101,321 have created public profiles. Forty-three percent of registered users with public profiles contribute content to the site.

**Company locations:** Walmart operates more than 4,100 facilities in the US

**Locations where people use the intranet:** Anyone on the Walmart payroll within the US can access the site, including those working in corporate and regional offices and satellite support centers for Walmart Stores & Neighborhood Markets, Sam's Club, Pharmacy Centers, Optometry Centers, Data Centers, Logistics, Warehouses, Truck Fleets, and Aviation

**Annual sales:** $401 billion (2009)

**Design team:**

Walmart has an in-house Web strategy, usability, and development team that works with Rockfish Interactive, its development agency.

**In-house, Corporate Communications (core team):** Suraya Bliss, Senior Director of Web and Digital Strategy; Ryan Travis, Senior Site Manager; Ben Newton, Senior Manager, Content Strategy; Dana Reynolds, Senior Manager, User Experience; Charlotte Clark, Team Coordinator

**In-house, Benefits Communications:** Julie Horner, Senior Director, Benefits Communications; Terry Homesley, Director of eBenefits, Benefits Communications; Micah Laney, Senior Site Manager, Website; Sandy Tang Vohs, Manager, Technical Webmaster Content and Design; Sundance Trosper, Senior Manager, Online Marketing; Beverly Litzinger, Project Manager, Online Marketing; Donna Joyce, Project Manager, Online Marketing; Russell Shaffer, Project Manager, Online Marketing

**Rockfish Interactive:** John Cox, Director; Justin Hill, Senior Developer/Team Lead; Shawn Camp, Senior Web Developer; Scott Stamps, Senior Web developer; Daniel Worthy, Web Developer; Chris Rice, Web Developer; Rustin Treat, Web Developer; Joey Nelson, Creative Director; Ryan Kee, Senior Designer

## SUMMARY

Rather than build a traditional site, Walmart has built a successful social networking intranet with corporate content available throughout. The first vision for the site reflected a more standard approach, focusing on benefits and providing utility and content from the top down, emphasizing corporate information and values. Early research into associates' preferences and interests made the team reconsider the site's entire structure and a new direction quickly emerged. Rather than focusing on corporate information and allowing interaction among associates as a secondary goal, the team flipped their priorities and set out to build a social network that would convey corporate information while allowing and encouraging associates to build relationships, connect around shared passions, and share information.

Emphasis on the user started early in the planning process, and the team conducted research throughout design and development to always keep the associate at the center of the site development. The team used surveys, focus groups, and usability tests to continually assess whether they were going in the right direction and making the site as simple as possible. An aim of the site was to make it easy to use for every associate, regardless of Internet experience. The team continues to listen to users' requests and accommodate them whenever possible.

Access to the site is mostly through associates' home computers, making it even more remarkable that 565,510 associates and counting have registered on the site. Enticing users to interact with the site, putting associates first and corporate second, helped the team accomplish this feat. The site is a trusted source for up-to-date and accurate information from the company, but is primarily a way for associates to communicate, participate, and get to know one another. This is quite an undertaking—and achievement—for a company with associates spread across more than 4,100 facilities.

Even the site's URL emphasizes the personal over the corporate. Users access the site via www.mywalmart.com. The team realized early on that they did not want to be in the position of pushing content out to associates; they needed to invite the users in.

The homepage emphasizes this focus on individuals and the community. While navigation across the top of the page provides easy access to corporate-level information and resources, the body of the page is focused on the individual. Content areas on the sides of the page, which follow the user throughout the site, give users quick access to up-to-date information. Users can add or remove "widgets" of content or leave the default settings. The only permanent widgets are the profile box, calendar, and *Walmart News*.

The user's public profile is highlighted in the upper left-hand corner of the screen, dominated by the user's picture and name. The site lists how long the associate has worked at Walmart, emphasizing loyalty as well as providing a bit of information about the associate. The *Profile* widget contains practical details and shortcuts, informing users of updates since their last visit, including updates to *Activities* and *Forum Posts*, as well as summarizing any outstanding *Alerts*, including *Friend Requests*, *Birthdays*, and *Anniversaries*.

The center of the homepage summarizes additional new and ever-changing information, including blog postings, videos, and an associate spotlight. Each focuses on connecting people, building community, and providing easy access to information. The *Associate Spotlight* presents individual associate's stories, taking a look at Walmart from a personal perspective. The middle of the page also summarizes news, new content, or upcoming deadlines, and allows the team to ask for continual user feedback. As an example, users were asked to complete a quick survey to "play a part in making *Benefits* easier to use."

The homepage provides plenty of space to present company information. A rotating display allows the site to prioritize important stories, events, or deadlines, such as the dates for open benefits enrollment. News headlines are displayed on the side of the screen, providing quick access to recent Walmart news as well as a link to view all news headlines. A featured video is not only displayed, but is playable on the homepage. Users can quickly navigate to more videos via the *Video Center* link or can scroll through videos using the *Previous* and *Next* links. They can play, pause, or mute the video, as well as adjust the volume through the player.

Such content is updated on a regular basis, based on site traffic patterns. The site sees a biweekly spike based on the payroll calendar, so the team makes sure to add fresh content three days before the expected spikes.

Current and updated information is further emphasized with the prominent display of the date, current stock price, and local weather, including the current weather and a weekly forecast.

Forums are a key component of mywalmart.com, and as such, have their own place on the homepage. Changes to forums are highlighted on the homepage, including a summary of recent changes and tabs to access changes to additional forums, including *Mine*, *Friends*, and *New*. Forums encourage community-building and feature questions and topics such as a forum devoted to Associates of the Year, or simply asking where a particular forum's participants are located. Such topics point out the diversity and distance among associates, while simultaneously drawing associates with similar experiences, interests, or backgrounds together, regardless of physical location.

The site's clean and clear design makes it easy for users to find content of interest, to see which links are clickable, and to pursue more detail when desired.

Pictured: The Walmart homepage nicely balances the site's emphasis on community and people while providing room for corporate information and news.

Encouraging employees to interact freely might strike fear into the hearts of some corporate executives. Trusting their community, but acknowledging the possibility for potential problems, the Walmart team worked to create a set of guidelines for using the site that would encourage participation while still keeping the site on track and welcoming to all users. The site was created with central Walmart beliefs in mind, such as the company's Three Basic Beliefs and Values:

- Respect for the individual
- Service to our customers
- Striving for excellence

Unlike many corporate intranets, users are encouraged to "leave your work at work." The company aims for associates to talk about work or resolve work-related issues at work—with their managers—rather than on the site.

The site lets users create their own forum topics, which go through a moderator review to ensure that they're appropriate for the site as well as to remove the possibility of duplicating an existing topic. A full-time community manager is responsible for approving topic requests. Once topics are approved, associate responses go live in real-time. Associates self-govern discussions on mywalmart.com, while the community manager passively follows discussion threads. The community manager also sends personalized email messages if any topic or post is rejected. These steps help ensure the consistent direction of the site. Associates are encouraged to choose open, inviting topics that will inspire discussion and participation on the site, helping a geographically dispersed workforce connect with one another.

Posts can be removed if reported as inappropriate by the community. But problems on the site are rare and the forums are a popular place for associates to share information, get to know one another, and participate in discussions. Each post is accompanied not only by the user's name, but his or her profile picture as well.

Users must register with the site to use it and must also create a public profile in order to interact with others. Creating a public profile requires that users accept the site's terms of use, which are largely intended for social networking purposes. Users can view the site, but not post, without accepting the terms. Currently, 43 percent of registered users with public profiles contribute content to the site.

Topics range from bonuses to reusable shopping bags to paperless paychecks to carbon emissions. The main forums page allows users to find or browse discussions by subject or topic. Each topic is shown with a clear title, the name of the person who started the discussions, and the name of the last person to post to the forum, along with the time it was updated. Users can "see" the community they are interacting with because profile pictures are shown beneath each topic name. The number of posts and the number of users are highlighted to the right. Showing who is participating as well as showing the popularity of topics helps encourage further participation. Users don't log on and see a set of empty forum topics; they see evidence of a lively and involved group of associates who are building an online community.

Corporate associates as well as field associates participate on the site. However, to maintain transparency and trust, corporate associates identify themselves if they are posting topics in forums or discussions. This helps the site retain its authentic feel.

This focus on authenticity is carried through to more corporate sections of the site as well, where there are general guidelines for content, but no formal style guidelines.

Pictured: Forums are a central part of the Walmart intranet, allowing associates to meet one another and have discussions about a range of topics. Pretty much anything is fair game for the boards, pending approval, so long as it's not a discussion of associates' day-to-day work.

Forum pages make it simple for users to read or join the discussion. The topic or question is displayed prominently at the top of the page, together with a clear and easy to locate link to *Post a Reply*. The page shows users how many posts have been added to the discussion and how many people are participating. Associates' replies are listed below in chronological order to make it easy to read through a threaded discussion from beginning to end. Users' names and profile pictures are displayed, adding to the sense of community and openness. Associates are reminded at the top of the screen that Walmart policies apply and that the use of the forum is voluntary.

The reminder points out that user are not to engage in “off the clock work” on the discussion pages.

Forum posts are community monitored, meaning that users are responsible for reporting something as inappropriate. Posts reported more than once are automatically removed for review. Content can be reposted if the reviewer determines the content in question follows site policy. A simple *Report As Inappropriate* link beneath the poster’s profile picture serves a dual purpose. It allows associates to report content that is questionable, but it also acts as a consistent reminder to associates to make sure any posting follows the Walmart guidelines.

Pictured: Discussions are easy to follow on forum pages, and each conversation features large profile images of the participants, giving each a personal feel.

The profile page provides information about each registered associate on the site. Users can submit their own profile pictures, which are checked to ensure they are

appropriate, or can choose one of a selection of silhouettes if they prefer not to post a picture for all to see. Many associates choose to upload pictures of that show a bit of their personalities or their lives—including pictures of people with their families or pets, doing fun activities, or in beautiful places.

The profile page provides information about the associates' friends as well. Continuing the theme of a social network rather than a stiff corporate intranet, users can create relationships by making friend requests and confirming friendships with others. This information is used to populate the *Friends* section of the forum so users can quickly see forum posts that their friends have added. A summary of friend activity is featured prominently on users' profile pages. If friends have started a discussion or joined one, their comments are displayed on the page, together with a profile picture, a link directly to the friend's profile, and link to the relevant discussion forum.

Pictured: Profile pages give users a quick view of their friends' recent site activity.

Another main goal of the site is to ingrain the company's values, such as working in the community and working toward sustainable practices. Corporate content on the site is linked to community features, helping to make even the more "official" content on the site familiar and accessible. For instance, the *Volunteerism* area is a mixture of corporate information about volunteer programs, associates' stories about particular projects and successes, blogs on devoting time to community work, and even videos showing related content. Forums are incorporated throughout the site, highlighting posts and topics related to the page—in this case, encouraging associates to discuss experiences and volunteering opportunities in their communities.

Pictured: The landing page for *Volunteerism* presents a broad view of community involvement by associates around the country, from large national campaigns to local revitalization projects and scout troops.

Even the normally stoic executive biographies on the site show some personality. The team searched for casual photographs of executives, to match the style of the

site. Personal details are included in the biographies. For instance, the head of Legal once worked as a tailor—a fact that few in the organization would know. The approach tries to make executives more relatable to associates by providing more than the basic education and experience.

Even the method of viewing executive biographies is unique. When associates mouse over a profile, the photo enhances, a short bio description appears, and the photos reorganize to show the reporting structure of the organization. Another click on the executive's photo brings up a full profile description, with details added specifically for the intranet that bring out more personal aspects of each individual.

Pictured: The site provides executive biographies that emphasize personal aspects of each individual.

The *Video Center* gives users quick access to all the site's videos, which are also displayed throughout the site. Users can create a playlist of videos, lining up the brief segments they want to watch. The playlist is displayed on the side of the main

player. Users can play, pause, or stop the video as needed or adjust the volume through the site. A description of the currently selected video, including the length and user ratings, is shown below the video player. Users are invited to rate the videos after watching them by clicking on a star in a five-star rating system.

Users can search the *Video Center*, using a dropdown menu to select a particular channel or tag, or they can enter a search term. They can also browse from a list of the latest videos shown at the bottom of the page, each with a title and some with a brief description. Each video is shown with the option to play it immediately or to add it to the playlist.

Pictured: The Walmart *Video Center* provides a central location for users to find videos of interest. Relevant videos are also incorporated into pages throughout the site.

The emphasis on community doesn't mean the site overlooks the importance of being a trusted source of internal information. Sections such as *Knowledge Center*

give users more standard intranet fare, such as fact sheets and news headlines. *Knowledge Center* content often comes from RSS feeds from the company's public corporate website, www.walmartstores.com.

Shared content isn't the only aspect of the public site that influenced the intranet. The team also took lessons learned from usability testing of the public site to determine the best design practices for the internal site. Sharing knowledge between sites can help companies built even stronger and more usable sites, both internal and external.

Pictured: Corporate information is available on the site as well, such as fact sheets and news about sustainability, some of which comes directly from Walmart's public-facing corporate site, www.walmartstores.com.

The Walmart intranet is a work in progress. Launched before all planned content was completed, it's still a success and associates are already engaged in the site. With more user-focused sections, content, and tools in the works, the site will continue to

develop as an associate-centered, interactive, informative resource to engage and connect employees.

While the site's creative structure certainly wouldn't work for every organization, it's a great solution for this company's particular workforce. The social aspects of the site help users connect in a way that would be impossible without the site, bridging geographic barriers to connect with others across the country. The site expands the Walmart community beyond the confines of the each store's walls.

## BACKGROUND

The foundation for mywalmart.com was laid in January 2004 with the launch of walmartbenefits.com, an associate communications portal focused on providing access to benefits content and applications to associates while they are at home. As the number of registered associates grew, the focus rapidly expanded. "The benefits site became a key channel for all types of communication to associates at home, providing access to vital information all day, every day, even during Hurricane Katrina and other critical situations," says Terry Homesley, Director of eBenefits, Benefits Communications.

Today, mywalmart.com is heir to much of the *Benefits* site's content, which includes associate discounts and other related information. Throughout the evolution from *Benefits* portal to mywalmart.com, the development team has stayed focused on not only providing information that associates need, but doing so in an accessible manner. "We provide quick and easy access to benefits, personal and financial resources, regardless of the associate's experience using the Internet," says Homesley.

mywalmart.com is deeply rooted in the idea of social networking and the advantages that such features provide for associates to further engage with the company, but in a less formal, less top-down manner. The site's social focus provides associates a place to go for trustworthy information and a place to interact with each other. Because mywalmart.com was not a redesign of an existing site, but rather was built from the ground up, the team was able to create an entirely new site experience for Walmart associates while adhering to the business purpose of the former *Benefits* site.

Surveys conducted with Walmart's associates revealed several critical statistics that helped guided the company's direction for mywalmart.com. These included:

- 83 percent of associates expect the company to have a functioning social network
- 81 percent of associates want information about the company when not at work and they don't want another corporate information site written from the Home Office's perspective
- 78 percent are interested in connecting with other associates
- 79 percent said they would use social networking tools if available

Like a standard corporate information website, mywalmart.com provides associates with facts about the company, which helps the company to:

- Educate associates
- Shape perceptions and build pride
- Motivate associates to get involved in their communities

- Enable associate to be Walmart reputation ambassadors and tell the company's story to friends and family

The site also fulfills a practical business need, providing a single platform for many departments wanting to reach associates with:

- A single source of truth
- One brand experience
- Consolidated development
- Redundancy elimination
- Corporate content, news, and fact sheets are fed to this site via RSS from walmartstores.com

## Looking Ahead

Following the site's March 2009 launch, mywalmart.com continues to gain momentum and expand. The company will complete the redesign/integration of benefits within the next year and develop a work-scheduling tool in 2010. A host of other features will follow in future releases, including:

- **Emergency Operations Center** to assist associates from home in times of local or national emergencies (applying tools and lessons learned from managing the Hurricane Katrina disaster)
- **Work schedules** that individuals can check from home
- **Mobile widgets** for work schedules, pay stubs, and site alerts
- **Merit badges** for site participation and group membership
- **Career mentoring** and matching mentors with mentees, along with career and personal growth tools and resources
- **Personal sustainability** goal tools with progress markers to share and challenge friends
- **Associate-only classified ads** (Walmart currently uses the public classifieds offered on walmart.com)
- **Direct sharing of associate videos**
- **Audio, photo, and video contests** with peer voting for winners
- **Direct messaging** among accepted friends
- **Profile photo decoration** for birthdays and work anniversaries
- **"Have you met…?"** friend-finding tool based on similar interest metrics with enhanced personal info tool in profiles
- **Management connection center,** an authenticated managers-only social network section permitting more business-related resource sharing
- **Peer-reviewed products** on the walmart.com retail site

Pictured: A rough sketch of potential new navigation taxonomy that will be tested in the next round of usability studies conducted for the site.

## TEAM

### Site Ownership

mywalmart.com operates under the auspices of Corporate Communications, within Corporate Affairs. This provides a number of advantages. “Because Walmart’s communication and public relations professionals are focused on reaching and engaging associates, they provide a broad overview of internal work streams, explaining the business holistically, rather than from an internal business perspective,” says Suraya Bliss, Senior Director of Web and Digital Strategy. “They are also in tune with the external climate, which often shapes dialogue on the site.”

“Working in silos is clearly counterproductive,” says Bliss. “As we continue to develop mywalmart, we work across the company to consolidate sites or content into mywalmart that as standalone projects would splinter associates’ experience and fragment message delivery. This provides a consistent experience with the Walmart brand, ensures consistency of information, and lowers costs.”

### Team Roles

Five functional areas within the company provide core support and/or content for mywalmart.com. These include: Corporate Communications, Benefits, Ethics, Legal, and Internal Systems Division (ISD). These teams maintain separate internal reporting structures while sharing vision, strategy, and tactics. Responsibility for site strategy resides in Corporate Communications.

The following charts break down individual team roles and responsibilities to show how the many constituencies involved in the site work together to support mywalmart.com:

| CORPORATE COMMUNICATIONS TEAM | |
|---|---|
| **Role** | **Responsibility** |
| **Web and Digital Communications Sr. Director, Corporate Communications** | • Responsible for digital and platform strategy for corporate affairs, mywalmart.com, and Walmart's external corporate reputation site, walmartstores.com |
| **Site & Strategy, Corporate Communications—Senior Manager and Team Lead (core team)** | • Evaluates business requirements and procures in-house, third-party, or agency-provided solutions |
| **User Experience & Usability—Senior Manager (core team)** | • Coordinates and ensures that design agencies, usability providers, and solution providers meet the needs of users and business partners |
| **Content Strategy, Corporate Communications—Senior Manager (core team)** | • Schedules and coordinates all communication campaigns on the site and manages campaign assets such as videos, artwork, and banners; also manages community and user content issues |
| **Community Manager** | • Full-time agency employee who monitors user-generated content and approves moderated topic requests; responds to all user inquiries; and reports back on user content to business areas that might wish to engage associates in conversations |
| **Subject Matter Experts (SMEs) & Editors** | • As-needed writing assistance for SME blogs and voice and tone oversight for corporate content; might be pulled from any available communications team or agency as needed |
| **Feedback Administrator** | • Part-time; replies to user questions or forwards comments to the right department |

| SUPPORT TEAMS | |
|---|---|
| **Role** | **Responsibility** |
| **Legal Advisor** | • Provides legal support as expert on online policy and user agreement; reviews corporate content as needed |
| **Ethics** | • Provides ethics and content moderation support; reviews user content as needed and passively moderates profile photos; manages gross misconduct on the site |

| BENEFITS COMMUNICATIONS TEAM | |
|---|---|
| **Role** | **Responsibility** |
| **Director, Benefits Communications** | • Oversees online associate communication regarding benefits and associate discounts |
| **Senior Manager, Site Strategy, Benefits Communications** | • Manages strategy and develops/implements solutions for internal and external online communication platforms |
| **Manager, Site Operations, Benefits Communications** | • Manages user experience, design, content, graphic development, and implementation |
| **Senior Manager, Marketing Strategy, Benefits Communications** | • Manages strategy for online benefits marketing across the company; develops and implements campaigns |
| **Manager, Online Marketing Projects, Benefits Communications** | • Develops and manages online marketing solutions; manages vendor interaction and legal requirements for associate discounts |

| WALMART INTERNAL SYSTEMS DIVISION (SITE SUPPORT) | |
|---|---|
| **Role** | **Responsibility** |
| **ISD Business Analyst** | • Provides IT support |
| **ISD Project Specialist** | • Provides IT support |
| **ISD Programmer Analyst** | • Provides IT support |

| ROCKFISH INTERACTIVE (DESIGN AND DEVELOPMENT SUPPORT) | |
|---|---|
| **Role** | **Responsibility** |
| **Senior Developer/Team Lead** | • Provides technical leadership and direction for the Web development team; coordinates all development and deployment efforts |
| **Development Team (4)** | • Responsible for all HTML, Javascript, .NET, and SQL code implementation and testing |
| **Senior Web Designer (part-time)** | • Responsible for all creative aspects of the site, from original design through ongoing revisions |
| **Senior Account Manager** | • Coordinates change requests, project management, and reporting to client and production team |
| **Technology Director** | • Project coordinator through launch; oversees ongoing development |

## Changing Responsibilities

Staffing within Corporate Communications was initially a shared responsibility. Staff split their time between content development and project management. As the business focus for the site broadened and social media became the focus of the site,

the need for specialty positions emerged. Staff responsibilities shifted to accommodate the changes:

- The site manager is now more focused on acquiring new technology to support new features, such as associates' ability to track their sustainability efforts and check their work schedules from home.
- The content manager became a coordinator of strategic campaigns across the site. One campaign might include a feature story, fun poll, artwork, related forums and blogs, videos, and links to outside resources. This is all done in coordination with other company communication channels, such as *Walmart World* magazine.
- A full-time community manager was added to keep subject matter experts (SME) informed about where they could lend their expertise to support associate forums and to report back each week on trends that might be of interest to the business.
- A usability and user experience staff member was assigned to accommodate wireframe redesigns, recommend and evaluate Web solutions, and coordinate usability objectives with Walmart's design firm.
- The Benefits Communications staff is actively working to repurpose its content and strategy within the new social network context.
- Walmart's legal department assigned personnel for support and guidance.
- Corporate communications provided a resource to the company's Ethics department, with a "dotted line" reporting structure back to the mywalmart.com core team. This change keeps all ethical decision-making in the proper department, but provides a staff member to help out with the challenges of hosting user-generated content.

## Working with Agencies

According to Bliss, agency support has always been part of the Web development business model and agencies are considered an important resource. Specifically, for mywalmart.com, Rockfish Interactive has been the primary production agency working on the site from its inception through the development and maintenance phases. The typical back and forth between the internal Walmart team and the Rockfish Interactive team goes something like this:

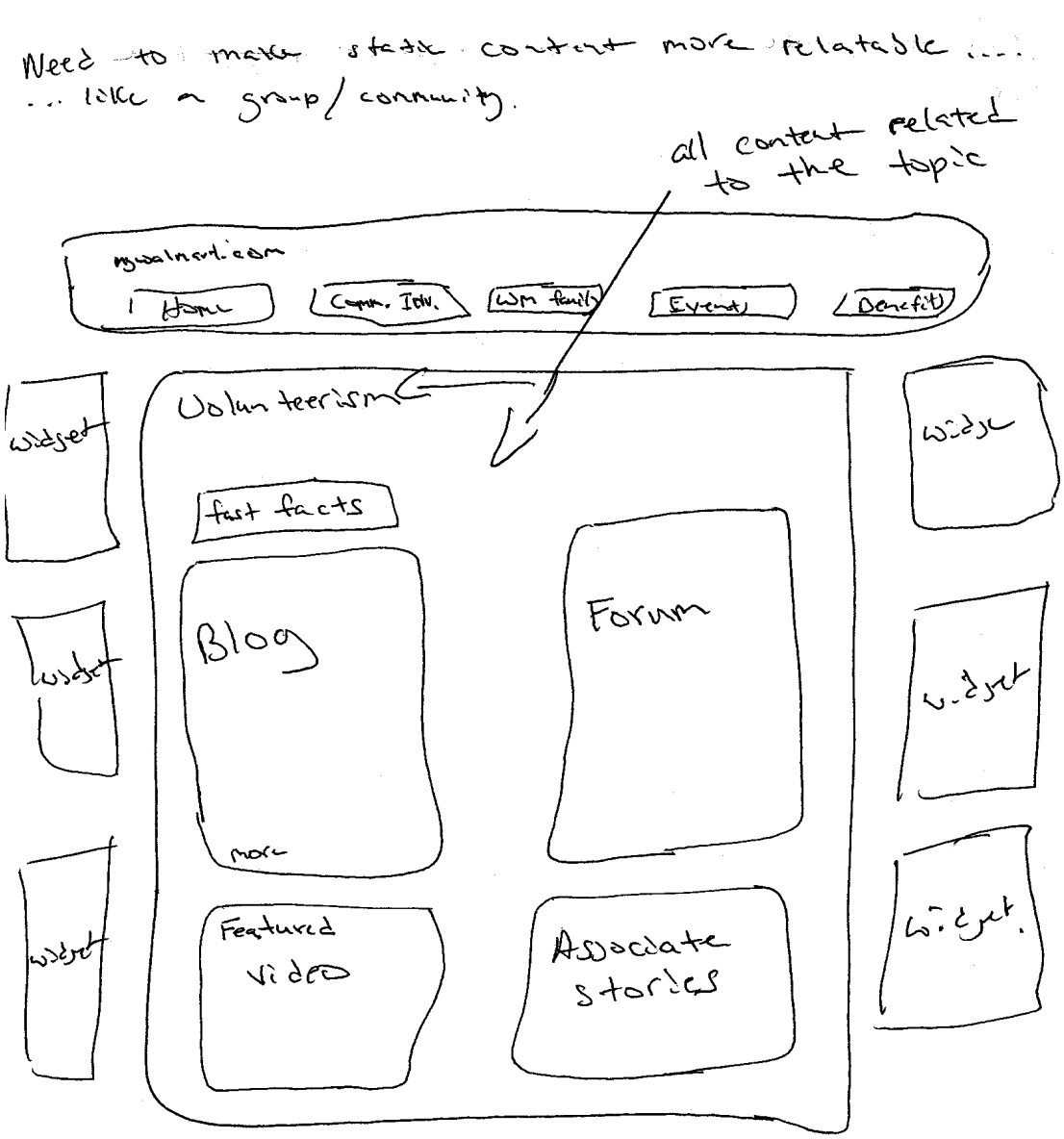
- **Site planning.** Walmart team members, who consult with internal clients to understand their business objectives and requirements, do the site planning. "From here, our Corporate Communications team creates a design concept and meets with internal clients to discuss how content or applications would look and function," says Ryan Travis, Senior Site Manager. "This work is typically completed prior to sitting down with Rockfish Interactive."

- **Design.** “Rockfish Interactive reviews Walmart’s vision sketches, which may be as rough as white-boarding or as refined as fully realized mock-ups in Photoshop,” says Travis. During the development stage leading up to rollout, a core team staff member spends time at the agency clarifying objectives, approving design modifications, and considering the design and functional enhancements that Rockfish Interactive offers.
  Walmart works with Rockfish to achieve consistent brand interpretation across many of the company’s sites and to define the nuanced differences between the company’s social network properties versus Walmart’s corporate reputation “look and feel.”
- **Ongoing support.** As the site reaches the maintenance and enhancement stage, this partnership with Rockfish Interactive enables the internal team to focus its efforts on accommodating requests as the site grows and gains momentum within the organization. As the site evolves, so does the partnership between agency and Walmart teams.

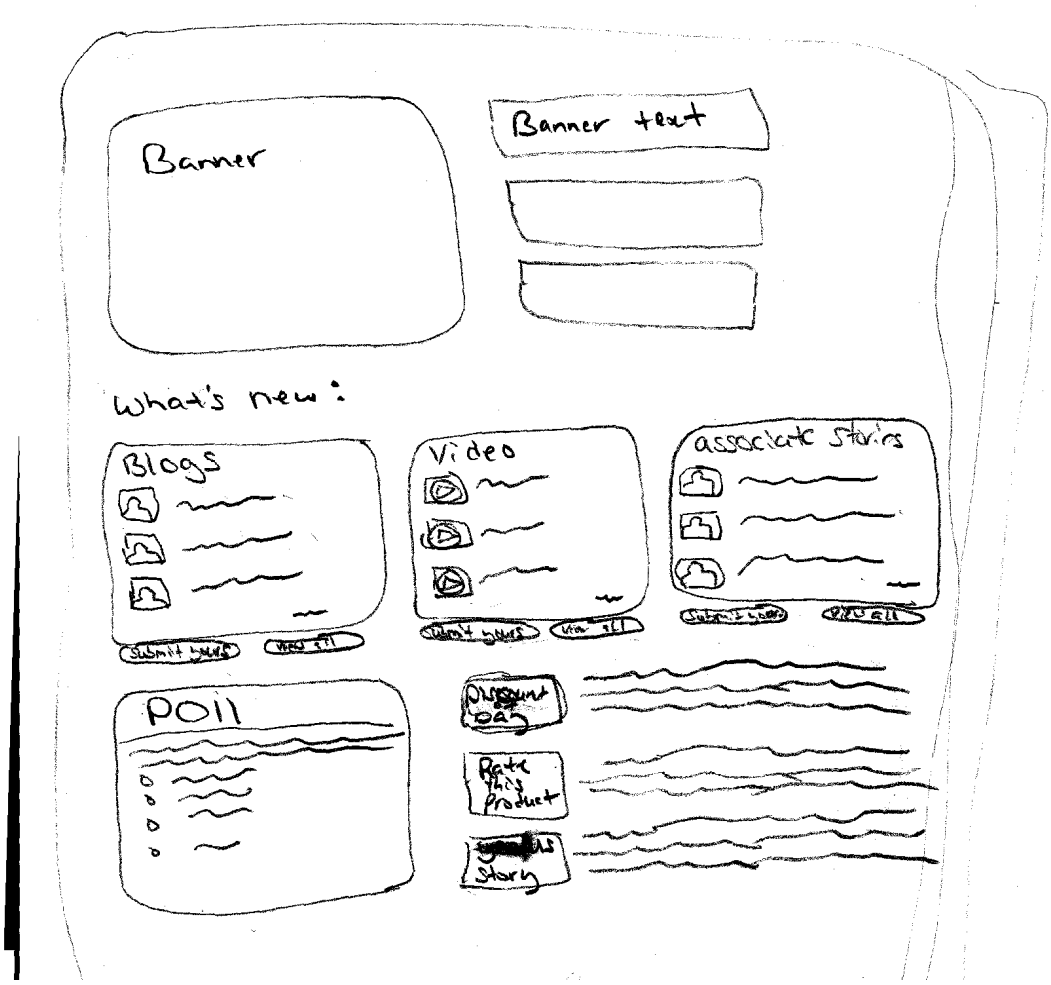
  “We are increasingly partnering with Rockfish Interactive for creative work on digital assets, such as video editing and banner creation,” says Ben Newton, Senior Manager, Content Strategy. “As we gain internal attention and buy-in, we must focus on strategy and coordination of accommodating requests, leaving less time for creative maintenance.”

  Rockfish Interactive works closely with the Walmart team, providing a dedicated coordinator who attends all team meetings, captures ongoing concerns and ideas for improvement, and works as a liaison with Walmart’s developers.

  Walmart also has established lasting relationships with multiple usability and metrics-tracking agencies and consultants for other types of support. These include: User Centric, Human Factors International, Omniture, and Forrester Research.

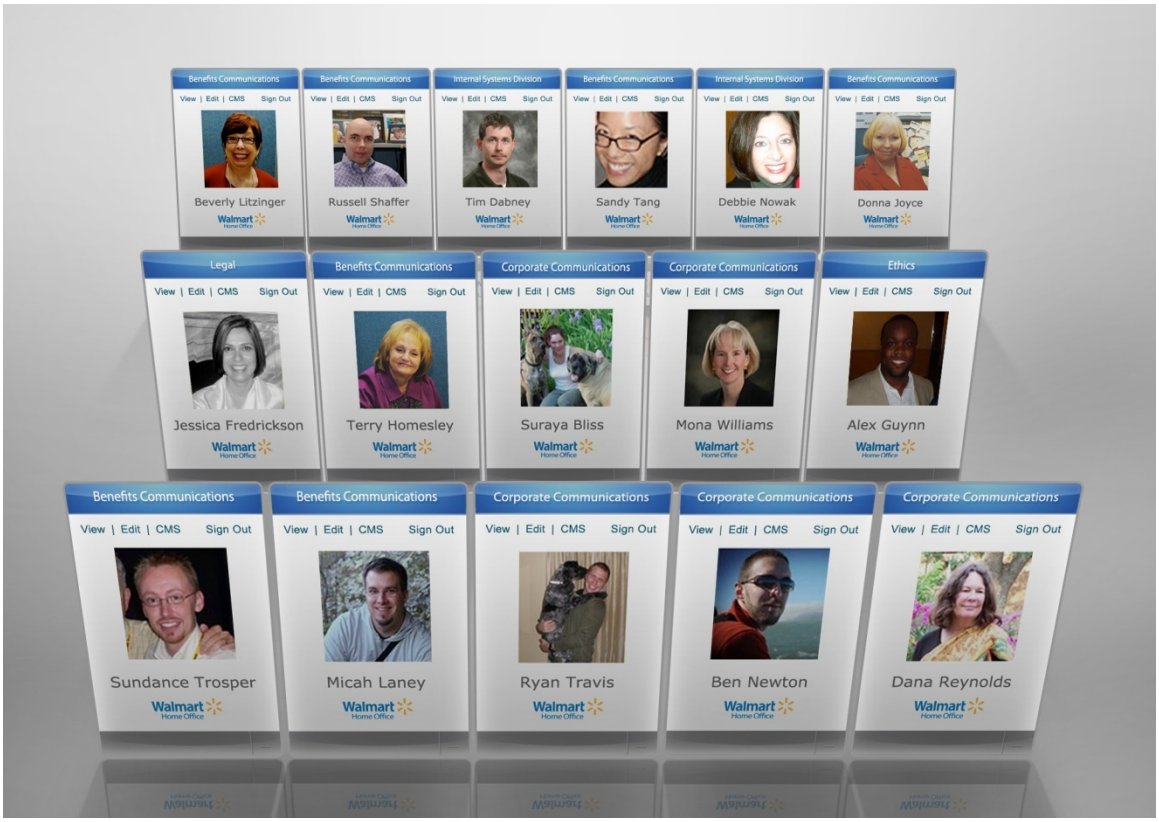



Pictured: This sketch was the product of many conversations regarding the team's usability study findings. Once team members agreed that it was sufficient as a ballpark interpretation of the data, they moved onto wireframes, coding, testing, and then ultimately the site design that associates use today.




Pictured: A sketch of the second-generation homepage for mywalmart.com. The challenge was to maximize content "above the fold" without cluttering the page.

## Meet the team




Pictured: The mywalmart.com team. (Top row, left to right): Beverly Litzinger, Russell Shaffer, Tim Dabney, Sandy Tang, Debbie Nowak, Donna Joyce; (middle row, left to right): Jessica Fredrickson, Terry Homesley, Suraya Bliss, Mona Williams, Alex Guynn; (bottom row, left to right) Sundance Trosper, Micah Laney, Ryan Travis, Ben Newton, Dana Reynolds.

Pictured: The Rockfish Interactive team. (Back row, left to right): Peter Gustafson, Justin Hill, Joey Nelson, Scott Stamps, Lisa Thurber; (front row, left to right): Kenny Tomlin, John Cox, Daniel Worthy, Ryan Kee, Dustin Solomon.

## GOVERNANCE

Intranet governance is a continual challenge as companies step deeper into the emerging area of social media inside the enterprise. Employing social elements on the intranet means that companies have to make a decision early on: either let the community flourish on its own and take action only if there is an infraction of the site's rules, or have the company act as a guiding hand in moderating what content goes live after users have submitted it. Walmart has taken a "gentle moderation" approach, providing sets of guidelines that users must accept before using the site and also providing moderation to help ensure the site's consistent direction.

### Setting Governance Policies

Associate use of mywalmart.com is governed first by a Digital Social Network Policy established by the company's HR department to govern associates' conduct regarding company information disclosed on social networks writ large. If someone is a Walmart associate he or she is expected to adhere to this policy whether using mywalmart.com or interacting with people outside the company on social networking sites such as Facebook.com.

A hurdle prior to the launch of mywalmart.com was writing the site's Terms of Use (TOU), which aligned with Walmart's corporate Digital Social Network Policy, with specific demands for an associate website.

The site policy is a set of legal guidelines that helped create the site's TOU. Any associate who wants to participate in the site's community section, build a public profile, contribute content, participate in the forums, and so on must accept the TOU before being granted "write" privileges. Users who decline the TOU may view content in the community but may not contribute to it. Users with private profiles (those who have registered but not accepted the site policy and TOU) may view all portions of the site and still have access to benefits applications, online pay stubs, and so on.

In addition to the TOU, the company has developed Community Guidelines, which take the policy and TOU legalese and distill it down into a digestible, easy to understand set of guidelines that serve as a handy reference for site users.

The benefits of accepting the TOU are full participation in the site and include the following functions not available to the read-only users:

- Only associates with public profiles appear in the *Friend Directory* and can exchange friend requests.
- Profiles must be public before a user can submit content in any form, including profile photos and forum posts. Public users who don't wish to submit a photo can choose from a variety of silhouette avatars.

The following is an at-a-glance look at Walmart's governance policies:

- **Digital Social Network Policy**: Applies to all Walmart employees globally and covers expected behavior concerning company information, both inside and outside the company. This is a global HR policy.
- **Terms of Use (TOU**): Users who want to contribute to the community must agree to these legal terms. If they don't, they can only read the content.
- **Community Guidelines:** Distills the TOU into a handy reference (see below) written in layman's terms.

| MYWALMART.COM COMMUNITY GUIDELINES |
| --- |
| mywalmart.com was made for you. Almost every page has a place to share your thoughts and stories for other associates to see. Here are a few simple guidelines to keep in mind when contributing to the site.<br><br>**What to do…**<br><br>1. **Share your thoughts:** We want to know what you think. Join the conversations on the site.<br>2. **Stay on topic:** If you join a conversation, keep your comments related to the current topic. This helps everyone follow the conversation. If the current topic doesn't interest you, hit the "Request a New Topic" button, and submit a new topic for review.<br>3. **Show respect:** We're all aware of the Three Basic Beliefs and the importance of showing respect for the individual. Everyone deserves that same level of respect on the site, too.<br>4. **It's ok to disagree:** We don't all see eye to eye on everything. Wouldn't that be boring? If you disagree about something posted, say so. Just remember to do it in a respectful way.<br>5. **Have fun:** Enjoy and make this your site. Get involved. Share your thoughts and experiences. Learn what others think and join the conversation. |

**What not to do…**

6. **Don't break the law:** Don't post anything that involves or promotes illegal activity.
7. **Don't be mean:** Don't post anything obscene, lewd, discriminatory, or anything intended to harass someone. And don't gossip about other associates.
8. **Don't take your work to the site:** This site is not for chatting about setting that new modular or discussing the wonderful P&L report you're creating. There're plenty of other topics to learn about and discuss on the site. Leave your work at work.

**Still have questions or concerns…**

9. If you're unclear about what's appropriate for the site, refer to the site's Terms of Use and our Social Media Policy.
10. If you run across any inappropriate content on the site, you can use the "Report as Inappropriate" button to let us know.

**Content reported as inappropriate twice by the community is automatically pulled from the site for review.**

## Moderating User-Generated Content

The Walmart team developed a premoderated approval process on all forum topic requests to help ensure content remained appropriate and relevant to the site's goals. The team also installed the following reminders in several key areas on the site, including in every content submission form and on the forums themselves: "Associates remember our use of mywalmart.com is voluntary. If you choose to participate, Walmart policies apply, including the rule against off the clock work."

Also, Walmart posted the following tips on starting new discussion topics within the "What can I do here?" link in forums:

- **Keep work at work.** We're unable to post any topics that are work-related, such as how to improve your department, perform your job, or improve job-related tasks.
- **Be inviting.** Remember that forums are conversations. A topic should be open-ended and invite discussion and opinions different than your own.
- **Protect privacy.** Help protect our associates' privacy. Don't ask associates to disclose personal information such as email, addresses, and phone numbers.
- **Submit a new topic.** Make sure there isn't a similar forum already on the site.

Walmart's governance policy was developed so that the company could effectively monitor user-generated site content to ensure mywalmart.com remained focused on its original goal and Walmart's core values, yet not discourage associates from providing a steady stream of content. The following shows how this moderation is enacted on the site:

- **Forum topic requests, blogs, and associate stories** are "premoderated," meaning that, before publishing, topics must pass these standards:
    - Meet site policies and user agreements
    - Original, not repeated topic

    - Noncompensable: not topics that can be interpreted as fulfilling any work requirements or job duties
    - Have a broad appeal: topic isn't limited to a single site location or person, but inclusive of associates everywhere
    - Rejected posts are returned with a personalized letter explaining why they were rejected
- **Forum posts and blog comments** are community moderated and passively monitored by a community manager, meaning:
    - Posts that are reported more than once are automatically removed
    - Site managers review removed content and can reinstate it if it passes site policy and (if necessary) a legal/ethics review
- **Profile photos** are passively moderated after they are posted. Ethics reviews all new/changed photos uploaded on site profiles daily
- **Friends** are managed by each user and can be requested, blocked, or ignored, per user preference.

Within the first eight months of mywalmart.com's launch, 742 total forum topics were approved out of a total of 2,639 submitted. Travis says most of the 1,897 unpublished topics were rejected only because they were redundant with topics already posted. The forums generated more than 26,893 posts with 8,883 unique users contributing. The thread with the most posts (1,605 responses from 1,471 users) asked the question: "Where are you all from????"

Pictured: This widget displays an associate's “Walmart Family,” which are the users this associate has “friended” on the site. Associates can click on their friend’s photos to view their most recent activities on the site.

Pictured: This screen shows how a user would search for "friends" on the site.

## Self-Policing

In addition to the moderation provided by the Walmart team, community members on mywalmart.com also have the power to flag content as inappropriate or objectionable. Flagged content is always reviewed, and Walmart's Ethics office makes the final determination on what action should be taken. Rare infractions to policies include:

- **Discussions that touch on wage and hour concerns.** These might include conversations about fulfilling a job requirement or giving operational direction to improve a process. Walmart removes these posts and reminds community members to propose these ideas at work to their managers while on the clock.

- **Statements that infringe on privacy.** These types of statements include discussing the health or sexual orientation of another associate or customer.

### Dealing with Infractions

Despite having policies and safeguards in place, some users will inevitably push the envelope of what's acceptable. When that happens, the company takes action to try to rein in the user, first with a gentle nudge, then with more emphatic action. Thankfully, on mywalmart.com the latter doesn't happen often.

"Users who mildly push the policy's boundaries receive a personalized email with a description of our concern, a reminder on the policy, and encouragement to follow it in the future, while thanking them for being a part of our community," says Newton. "To date, we've only had to remove two forum posts for gross misconduct. If a post is questionable, we partner with our Ethics department to determine whether to leave the post up and follow with an educational post defining why it is inappropriate; or, to remove the post with an explanation. Usually, the community corrects itself and intervention is unnecessary."

### Handling Gross Misconduct

Users who engage in gross misconduct, such as publishing inappropriate photos, have their profiles locked as private and receive an explanatory letter. Although Newton says it's a rare occurrence, it does happen. "The ethics department treats the situation exactly as it would had the event occurred on any Walmart physical property," says Newton. "Walmart is proud of the community. With nearly 101,350 public profiles, only four inappropriate photos required removal. To date, we have never had to lock a user's profile for an inappropriate forum post."

He also notes that previously posted content of users who make their profile private (voluntarily or not) doesn't automatically disappear from the site. This preserves continuity in the forum threads.

### Managing an "Optimal Level of Dissonance"

Companies that embrace social features on their intranet must first understand that not everything said in those channels will be favorable toward the company. And then they must figure out how to handle that reality. A healthy acceptance of all employee commentary—both good and bad—can provide the company with a valuable opportunity to engage in the conversation rather than shutting it out.

"We recognize that not all comments will be in our company's favor," says Bliss. "We consider this valuable feedback. We also understand that these conversations will take place somewhere, and letting them occur where we can join the conversation is to everyone's advantage.

"Also, permitting an optimal level of dissonance is both engaging to users and demonstrates Walmart's respect for dissenting points of view, which earns our associates' trust," she says "We keep a sharp awareness of the important balance between a free-for-all and what is appropriate for a Walmart property."

## TIMELINE

From inception to rollout, the mywalmart.com site took approximately a year and a half to complete. The following timeline outlines the major milestones along the way:

| MYWALMART.COM PROJECT TIMELINE | | |
|---|---|---|
| **Task** | **Responsibility** | **Timing** |
| Inception | Walmart Corporate Affairs | October 2007 |
| Executive Alignment | Walmart Corporate Affairs | December 2007 |
| Research | Rockfish Interactive | November 2007 |
| Design prototype | Rockfish Interactive | February 2008 |
| Socialize concept deck | Corporate Communications /Walmart Benefits | February 2008 |
| **Reconcept for social networking** | | |
| Establish new business goals based on social networking | Corporate Communications | May 2008 |
| Stakeholder team meetings begin | Corporate Communications /Walmart Benefits | June 2008 |
| Review policy | Legal | May–December 2008 |
| Secure legal approvals | Legal | May 2008–ongoing |
| Secure operational approvals | Corporate Communications | May 2008 |
| Select usability agency via RFP | Corporate Communications | May 2008 |
| Conduct usability study | Corporate Communications /User Centric | July 2008 |
| Conduct mapping | Corporate Communications | August 2008 |
| Create wireframes | Corporate Communications /Rockfish Interactive | September–December 2008 |
| Develop redesign based on usability study and business input; expand CMS to accommodate user-generated content management | Rockfish Interactive | September–December 2008 |
| Develop community moderation processes | Corporate Communications /Ethics/Legal | November 2008–January 2009 |
| Socialize social network concept deck | Corporate Communications | November 2008–February 2009 |

| | | |
|---|---|---|
| Finalize Social Network Policy and User Agreements | Corporate Communications /Legal | November 2008 |
| Create development schedule; develop social platform | Walmart ISD /Rockfish Interactive | September 2008–March 2009 |
| Conduct staging/testing | Walmart ISD/Rockfish Interactive | January–March 2009 |
| Develop user authentication | Walmart ISD | January–March 2009 |
| Go-live to build strategic user-generated content from Home Office SMEs | Corporate Communications /Subject Matter Experts | January–March 2009 |
| Internal marketing | Corporate Communications /Walmart Marketing | October 2008–February 2009 |
| **mywalmart.com Official Site Rollout March 2009** | | |
| Manage site adoption rates (both community and technical adaptations) | Corporate Communications /Walmart ISD/Rockfish Interactive | March 2009–ongoing |
| Develop business analysis and requirements for needed enhancements | Corporate Communications | March 2009–ongoing |
| Rollout enhancements:<br>• *Friends* activity list<br>• Forum widget<br>• CMS upgrades<br>• User status<br>  o Profile<br>  o Roles<br>  o User-generated content per user tool<br>  o User photos<br>  o Email user<br>  o Correspondence history<br>• Feedback manager<br>• New/updated profile photo review tool<br>• Email templates | Walmart/Rockfish Interactive | Beginning April 2009, 12-week rolling schedule of analysis, proposal, design, approvals, development, test, and rollout |

| | | |
|---|---|---|
| • Document templates | | |
| **Complete Benefits Integration** | | |
| Evaluate site | Benefits Communications/Corporate Communications | June 2009 |
| Conduct mapping | Benefits Communications | August 2009 |
| Prototype integration design and navigation layout | Benefits Communications /Rockfish Interactive | August 2009 |
| Conduct usability studies | Benefits Communications /Corporate Communications /User Centric/Human Factors International | September–November 2009 |
| Finalize design based on usability study findings | Benefits Communications /Rockfish Interactive | December 2009 |
| Enhance CMS & site tools for Benefits applications | Rockfish Interactive | September 2009–January 2010 |
| Content development | Benefits Communications /Walmart ISD/Rockfish Interactive | October 2009–February 2010 |
| Conduct staging/testing | Benefits Communications /Rockfish Interactive | February 2010 |
| Develop marketing plan | Benefits Communications /Corporate Communications | November 2009–February 2010 |
| **Integrated Benefits Rollout February 2010** | | |
| Manage anticipated adoption rates | Benefits Communications /Corporate Communications /Walmart ISD/Rockfish Interactive | February 2010–ongoing |

## GOALS

### Business Goals Meet User Expectations

Walmart's stated business goal for developing mywalmart.com was to provide a "one-stop-shop" for associates to interact with each other while delivering a consistent brand experience. To that end, the site's look, feel, tone, voice, and messaging all reflect Walmart's brand and culture.

In an effort to determine Walmart associates' expectations for the site and marry the business goals with the user goals, in 2007, the company engaged a research firm to conduct a study to determine what mattered most to associates and what values

would drive their online interactions. Walmart wanted to find out what messages resonated with associates and which communication channels they used and trusted. “We wanted to understand where they were getting their information and what they trusted,” says Bliss. “We wanted to find out what they expect from Walmart and meet their expectations.”

The research results indicated that family, community, and opportunity were values that mattered most to Walmart associates. In addition to these value pillars, the researchers discussed various communication channels and which ones resonated with the participants—in-store meetings, corporate publications, the intranet, casual conversations with colleagues, and so on.

The research revealed that associates wanted an online channel to communicate with the company and they wanted social networking features.

It was with this information in hand that the intranet team began to formulate how the site would align with the company’s value pillars and also accomplish the associates’ communication goals to create an ideal mywalmart.com site experience.

## Associate Engagement Goals

While the business goal of mywalmart.com is to turn corporate content into meaningful conversations, the company also aims to instill pride in its associates and drive higher interest in topics that might otherwise be ignored.

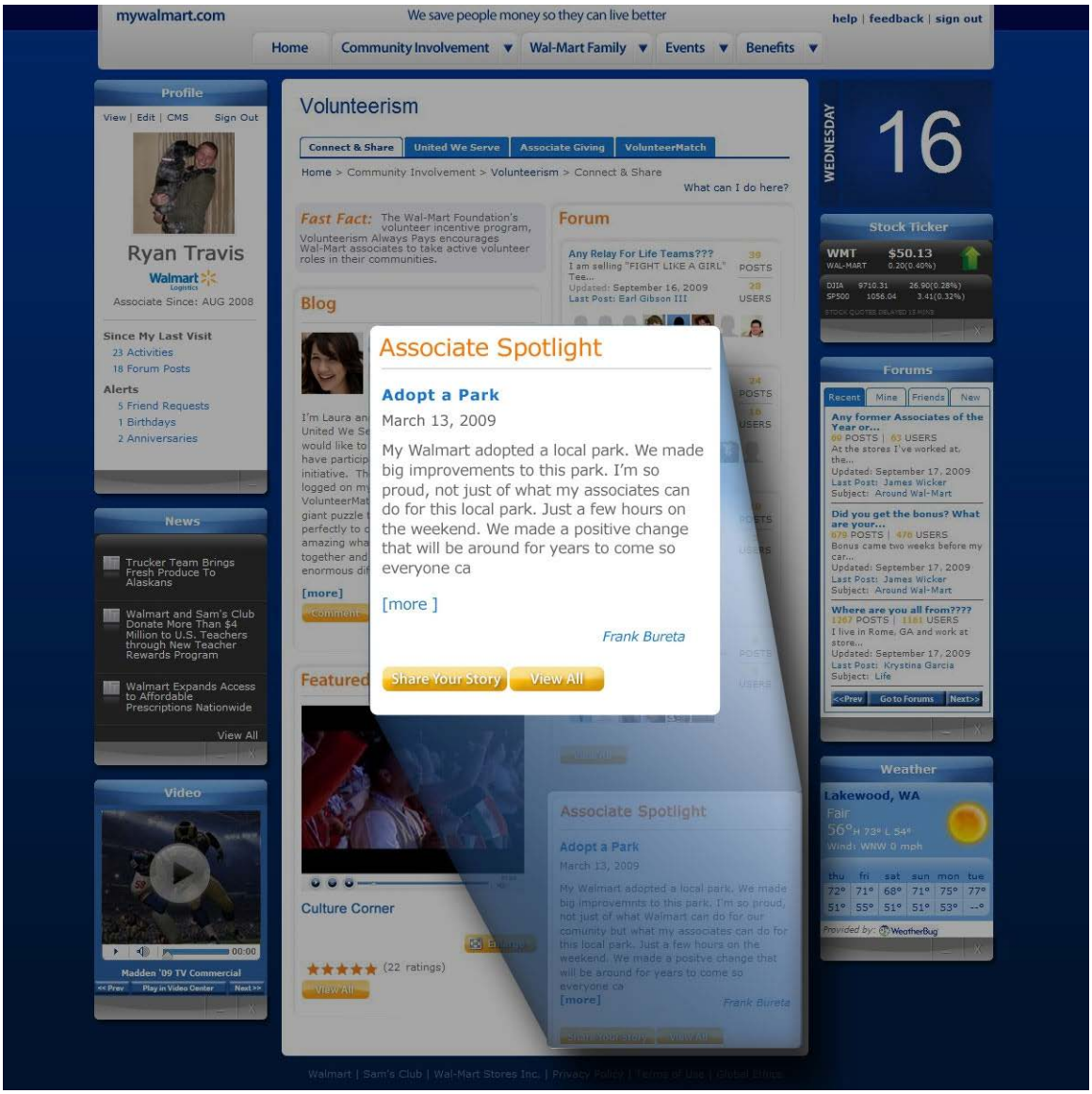
Additionally, the company aims to have the site accomplish the following:

- **Educate and enable associates as company ambassadors.** Research conducted for the company reveals that nearly one quarter (22 percent) of the US population knows someone who works at Walmart or Sam’s Club. Social media, such as the mywalmart.com features, let the company provide associates with information that makes each of them more informed stewards of the Walmart brand.

  “Associates know a large part of the population,” says Bliss. “If we make it easy for associates to access accurate information about the company and connect with each other, when a topic comes up regarding the company, they will be able to engage with the conversation because they are armed with accurate information.

  “We wanted to provide a place where we [the company] inform associates by providing the facts online,” she says. “And create an environment where associates can discuss topics with each other with accurate information within reach.”

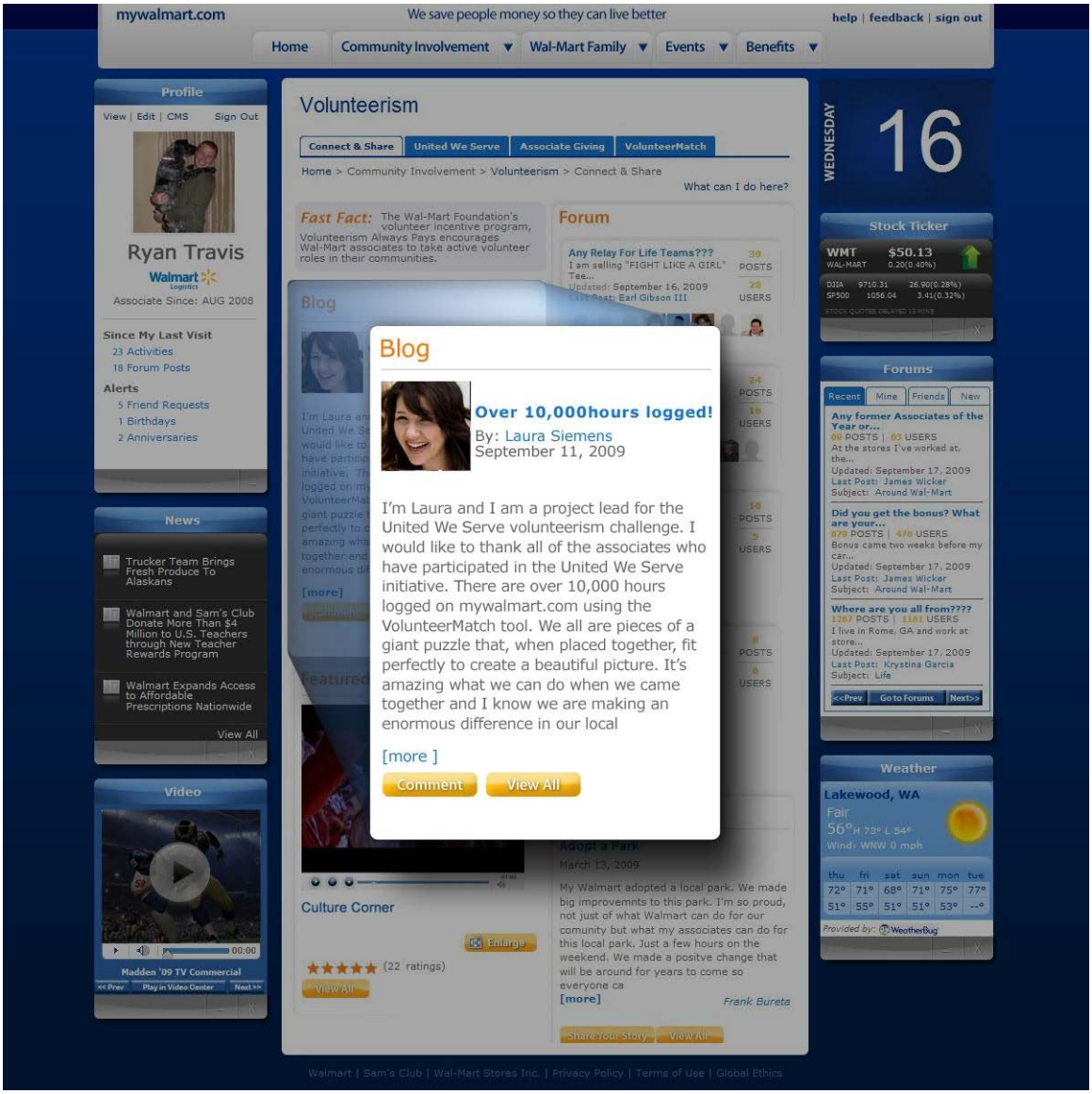
- **Reinforce and celebrate Walmart’s culture**. Through the social media channels on mywalmart.com, associates can share success stories with one another and participate in activities that reinforce the idea of Walmart as a second family. “Associates rally around their coworkers,” says Bliss. “Helping each other, supporting each other. And this online forum becomes another place where this can happen.”




Pictured: An example of an associate story. Associates share personal testimonials on the site. Many of the stories are about the how fellow associates in their store or club rallied to help them out during a difficult time. Associates also use this section of the site to recognize one another. These stories are reused in other corporate communication vehicles such as the company's internal magazine (*Walmart World*), internal memos, and presentations.

- **Support career and personal growth.** According to Bliss, three quarters of Walmart managers began their careers as store associates. "On the site, we make sure that we share that kind of information with associates so they can see that those opportunities exist and are available to them," she says. Currently, associates can read about new positions on the site and, as the site expands in 2010, the career section will provide easier ways for associates to see what jobs are available and also have an opportunity to discuss them with other associates.

- **Enable community involvement.** mywalmart.com helps associates learn about volunteer opportunities and gives them the opportunity to sign up and get involved in their local communities. They can also learn more about Walmart's environmental sustainability practices and how to incorporate these into their own lives. Other community involvement opportunities on the site include the ability to register to vote and become involved in Walmart's community action networks.




Pictured: An example of the *Connect & Share* blog in the site's *Volunteerism* section. The blog, forum, video, and associate stories in this section all contain content that pertains to volunteerism and getting the company's associates interested in making an impact in their communities.

- **Encourage peer networking through shared experiences.** The company is planning to offer career building, interpersonal growth, and diversity support groups on mywalmart.com in the future. Currently, associates have

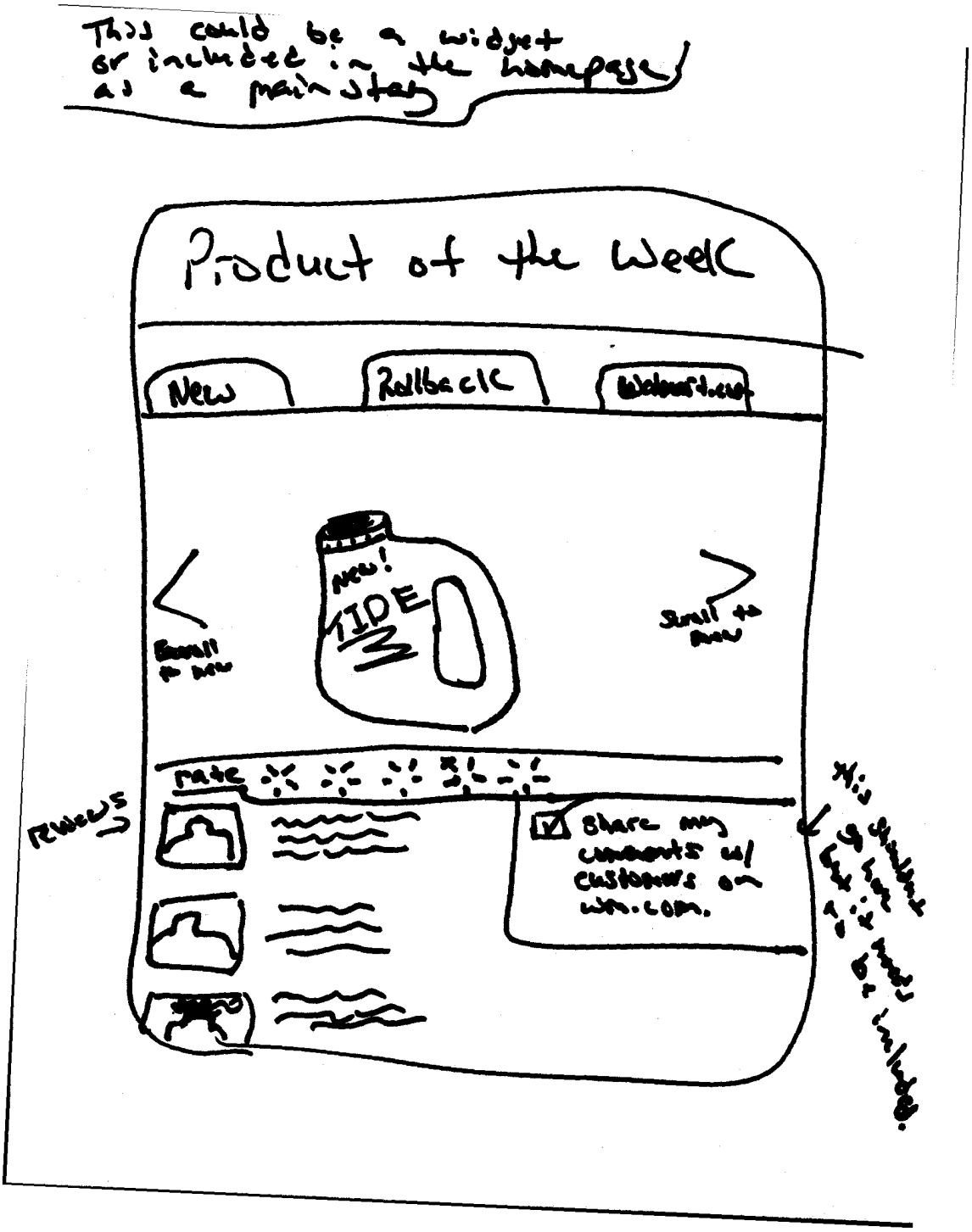
the opportunity to participate in video chats with executives and visiting celebrities.

- **Provide associates with resources to help them "live better."** mywalmart.com includes extensive personal health, tax and financial planning tools, and other resources.

  **Healthcare resources** include:
  - Direct health resources (such as the Ask Mayo Clinic Nurse helpline and Resources for Living for telephone counseling)
  - Healthy lifestyle resources including recipes, diet, and exercise tools
  - The ability to research health care options (such as network physicians and hospital rating reviews)
  - The ability to enroll in health benefits on the site

  **Financial planning resources, including the ability to:**
  - Manage beneficiaries
  - View upcoming and previous pay stubs
  - Take advantage of discounts and financial services
  - Manage investments and profit sharing

- **Offer peer-reviewed products and classified ads.** In partnership with walmart.com, the site is slated to provide a place where associates can share their knowledge of products sold by the company. The site lets associates rate products and comment on them, providing clarifying details and other shared information that helps other associates who might find be in a situation where that information is helpful. "The site lets them share their opinion about things," says Travis. "Not just positive, but negative, too. Honest opinions. People trust people like them so it's better than reading what a copywriter wrote about that product."




Pictured: A sketch of a feature currently under development. Once completed, this widget will allow associates to provide expert ratings and reviews on products from the company's internal site mywalmart.com and have their comments included in an RSS feed to the company's ecommerce site, walmart.com. The company believes this functionality will create greater online connectivity between customers and associates.

### Procedural Goals

Hundreds of thousands of associates visit the site each week, and the company especially sees a spike in site traffic each payroll cycle. To keep the site fresh for these visitors, content updates appear daily and all corporate-generated content is scheduled to refresh three days before these biweekly traffic peaks. Additionally, Walmart aims to:

- **Align communication** with other divisions and channels.
- **Establish and maintain ethics and legal processes** through user-reported content review; passive but complete moderation on all user photos; and guidance on community mediation responses.
- **Provide customer service** to the user through personalized email replies based on standardized templates; status feedback on all forum topic requests (whether content has been accepted or rejected and why); and feedback within three days on all user questions, which range from site comments to benefits questions.

### Constraints

Like many intranet teams, the Walmart team was operating under a series of constraints as they built the new site. These included:

- **Site access.** Because the site is accessible only from outside of work, ensuring that user authentication preserved associates privacy and guarded their records information was a challenge. "This is a particular challenge, as mywalmart.com is behind our firewall and our company must insure all users are currently employed here," says Travis. "We've put additional security measures in place to safeguard financial and health plan enrollment and beneficiary changes."
- **Timeline.** The Walmart team also experienced challenges with site development and rollout during the holiday season when the company must yield to operational priorities during peak shopping times.
- **Maintaining ethical standards** pertaining to ethical and legal parameters .
- **Avoiding distraction.** Because the project commanded such a high profile within the organization, it was difficult to maintain a through line from planning to launch. Gate-keeping, establishing priorities, and protecting mywalmart.com developers from ad hoc requests were daily challenges, but managing them well were the key to making the project a success.
- **Technical constraints.** A few essential site tools—such as friend messaging and user-generated videos and photo albums—were unavailable at rollout because of server space and cost constraints. The site's search tool, metrics dashboards, and flexible content templates were also unavailable at first. Many of these features have since been added or are now in development.

## USERS

Though mywalmart.com is an intranet, the site is available only to current associates who log in from their home computers. The site currently has 565,510 registered

users, and Walmart expects that number to jump to more than 800,000 once the *Benefits* site is fully integrated in February 2010. Login is restricted by authentication to anyone currently on Walmart payroll within the US, including those who work in corporate and regional offices, satellite support centers, Walmart Stores & Neighborhood Markets, Sam's Clubs, Pharmacy Centers, Optometry Centers, Data Centers, and Logistics (including warehouses, truck fleets, and aviation).

## USER TASKS

The site is divided into three main areas, offering the end user a variety of options for both accomplishing vital benefits-related tasks as well as interacting with fellow associates in an online social environment:

**1. Benefits**

Users can accomplish benefits-related tasks including:

- Access online pay stubs
- Access and manage 401(k) and profit sharing information (through single authentication, associates can log in to mywalmart.com and have direct access to their retirement brokerage accounts to sell stock, look at their 401(k) balance, and so on)
- Access the list of associate discounts

**2. Social networking**

The site's social network areas receive one-third of all page views. These features include access to user-generated content in forums and blogs and "friend" profiles.

**3. Corporate information**

The remaining page views are exclusively corporate information pages, such as news and topical knowledge centers. Corporate, however, is also strategically interwoven throughout the forums and blogs.

## USABILITY

### Starting with Research

Research was at the core of the design and development of mywalmart.com. "First, we researched and applied findings from other intranet research," says Dana Reynolds, Senior Manager, User Experience. "Most important was a usability report we completed in 2007 prior to redesigning our corporate Internet site, walmartstores.com." This report helped the team identify which elements of style, layout, and navigation they should incorporate into mywalmart.com to provide a consistent experience. "It also gave us valuable insight into navigation and organization pitfalls to avoid," she says.

Early user testing revealed that the initial prototype design (based on traditional information site design, where the corporate information was front and center) was ineffective at reaching associates in the manner they desired. "We had the look, we just didn't have the right focus," says Reynolds. "We didn't know yet how important social networking would be to meeting that goal. This study was the first step to making that evident."

The prototype featured navigation based on the company's "corporate reputation pillars" concept terms and the landing pages featured corporate content—and only corporate content. The early usability tests proved that this approach missed the mark. Content was neither easy to find nor easy to digest. "Walmart was still marketing ideas to associates, not inviting them to join the conversation," says Reynolds.

Using card-sorting methods and taxonomy structures, the team tested the reputation pillar approach to the terminology and naming conventions and found that this approach fell short of user expectations. "We found that as navigation terms, 'community,' 'opportunity,' 'family,' and 'rewards' were poor indicators of the content which fell under them," says Reynolds. "We consulted with business areas to understand their goals and messaging objectives, and then we reorganized these reputation pillars as interwoven context rather than as navigation categories."

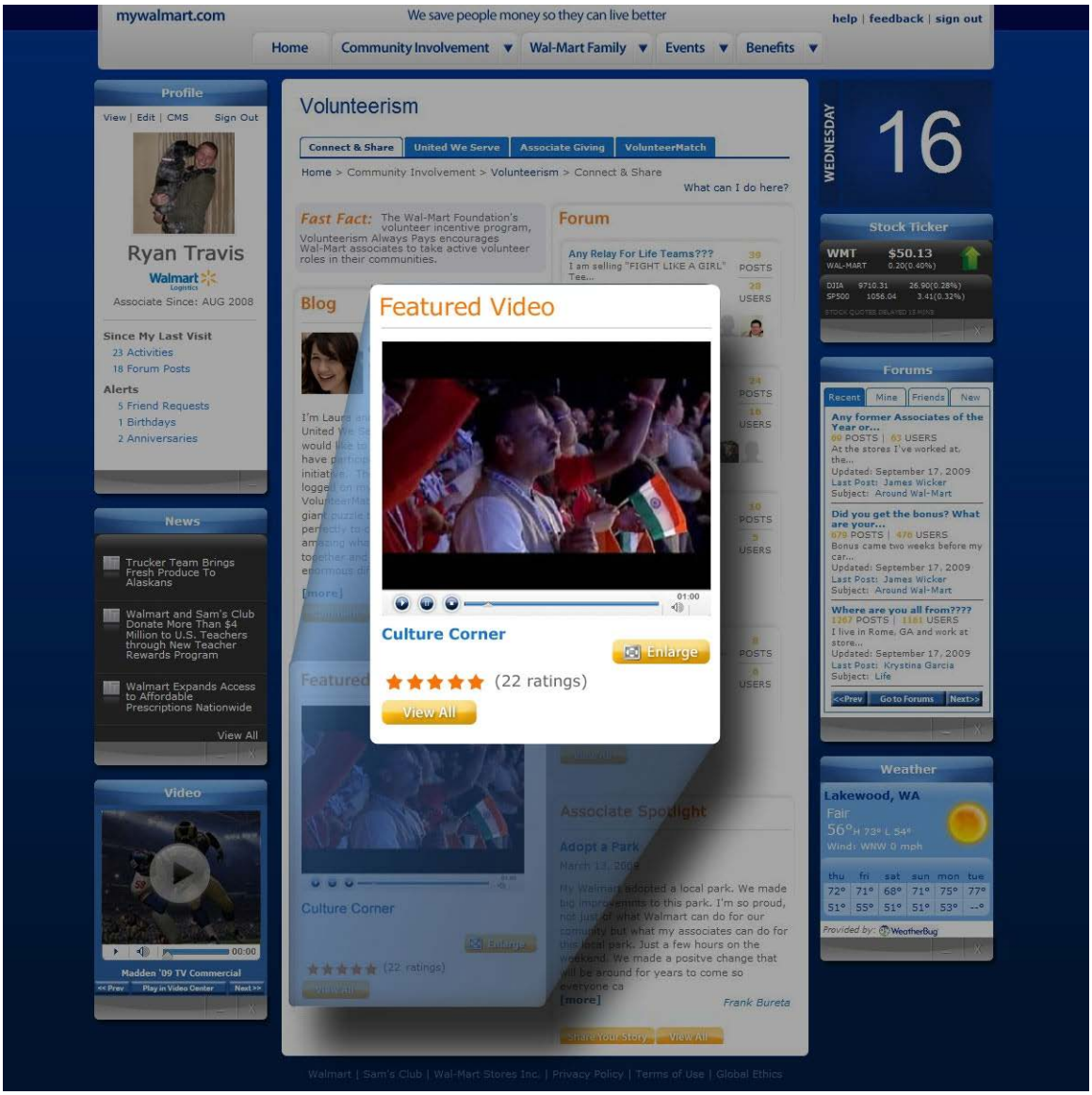
## Usability Study

At the conclusion of these early research activities, Walmart worked with User Centric to conduct a usability study of mywalmart.com. Twenty-nine associates participated face-to-face in off-site testing facilities in Arkansas and Chicago. Participants came from four facility types, drawn from 11 different facilities (including urban, suburban, and rural locations). Participant tenure with the company ranged from four months to 22 years. And participants' Internet habits ranged from none to daily use, with two-thirds of the participants having some experience with social networks. More than half had volunteered in their communities. The team used screen capture to track users' browsing behavior during scripted task scenarios and also captured responses, impressions, and feedback.

### Test Results Point the Way

According to Reynolds, the test sessions revealed that from the user's perspective, there was lots to read and little to do on the site. "The importance of putting the user in the center of the site, and making sure the site laddered up to corporate information was clear," says Reynolds. "So, the team redesigned the site as primarily a social network."

The subject area landing pages became hubs of user-generated content: blogs, forums, associate stories, and videos, with the company only occasionally posting forum topics that they wanted to put on associates' radar. (Corporate associates identify themselves when engaging in forums for full transparency.) Tools and corporate resources served as support on the topics users found most compelling.




Pictured: An example of a *Connect & Share* video. Videos are refreshed on the *Connect & Share* pages to compliment the blog's message. Videos can be commercials, brownbag events, celebrity shout-outs, seminars, and so on. The only requirement is that the video reinforces the primary *Connect & Share* theme for that content cycle.

Pictured: An example of a *Connect & Share* forum. The discussion threads on each of the six *Connect & Share* pages contain discussions relevant to the community they're in.

Engaging users with the prototype provided the team with valuable feedback and direction for the site. "The usability study helped us determine associates' understanding of the purpose and value of mywalmart.com, as well as the types of features associates are most interested in and which they would be most likely to use at home," says Reynolds. "The study also helped gather specific feedback and expectations for the type of content, level of detail, and overall relevance of the site features, which were key reputation drivers."

But most of all, the study pointed the way for the company to place social media components at the core of the site, rather than at its periphery.

"Before the study, Walmart considered social media components 'added features,'" says Reynolds. "The study revealed that social media was the site's primary

engagement draw. As a result, the homepage and all landing pages underwent an overhaul to refocus on user-generated content."

### Usability as a Tool for Continual Improvement

Applying usability testing methodology isn't just a one-off activity that the team applied during the design process. They plan to use those early tests as a baseline for ongoing engagement with the users toward the goal of continual improvement.

"We are committed to continuous improvement and consider usability—along with intelligent use of metrics—key to continued success," says Reynolds. "Early studies established baselines, but there's always room to improve. We have an ongoing usability budget and are scheduled to conduct two major studies this year, as well as ongoing surveys, associate focus groups, and analytics on feedback and site usage."

This year, the mywalmart.com team will have Human Factors International conduct an expert review of the site. And Walmart and User Centric will conduct follow-up user interviews to validate scheduled changes to the site's *Benefits* section. Internal staff also attended Human Factors Internal training for certification as usability analysts this year.

### Lessons Learned from Usability Testing

Reynolds points out two things the team learned during their usability activities:

- **Overbook your sessions.** "Because of the cost and coordination challenges involved in face-to-face interviews, we recommend overbooking to ensure every slot is filled," says Reynolds. "Our own staff informally interviews extra subjects and provides related surveys on topics the study doesn't cover."
- **Solicit different perspectives.** "Different usability service providers demonstrate areas of expertise in different areas," she says. "And we recommend cycling through a variety of agencies to get a broader evaluation of the site through various lenses."

## URL AND ACCESS

The site's URL is mywalmart.com. Only authenticated Walmart associates can access content, and the site is available only to associates outside of work. Associates who manage the site may access it from work on the corporate LAN.

More than 10,000 associates access mywalmart.com through mobile devices, such as smart phones, each month.

## TECHNOLOGY

The software and technology platform behind mywalmart.com is the following:

- **Design:** Adobe Photoshop
- **Development:** Microsoft Visual Studio 2008, .NET 3.5
- **Database:** Microsoft SQL Server 2005
- **Web Server:** Microsoft Windows Server 2003
- **Content Management:** Custom build, ground-up
- **Project Management:** Basecamp and MS Excel

## SEARCH

Applying effective search to an intranet is often both an initial challenge and an ongoing process of improvement over time. Search effectiveness is important, especially on an intranet where search results can be critical to finding information quickly. "Search on mywalmart.com has an interesting history," says Reynolds. "Our company's internal intranet usage taught us that users utilize search versus browsing at a 50/50 ratio. So getting it right was very important."

To understand how search evolved on mywalmart.com, you have to know a little bit about the site's history and evolution. The walmartbenefits.com site pre-dates mywalmart.com, and during the first year it was a "site within the site," accessible only to users who first logged into mywalmart.com. "The intention," says Reynolds, "was to fully integrate the old *Benefits* site within the year."

Although walmartbenefits.com had its own search, it was segregated behind its own firewall. This left Walmart with a choice between two imperfect solutions:

- **Option 1:** Have two searches on the dual site (one in the *Benefits* section, and one in the new mywalmart.com section) while it was still in transition. Users would then be able to search mywalmart.com content when they were in the new site area. However, they might not know that this was a dual site and try to search content using the "wrong" search tool. This could result in users not finding what they were looking for and thus assuming that essential benefits content didn't exist.
- **Option 2:** Don't offer search on mywalmart.com until the *Benefits* content is fully integrated. Users' experience on the *Benefits* side of the site wouldn't change, but the new social media features and content wouldn't be searchable.

The company chose the second option. The comprehensive search will rollout when the *Benefits* site fully integrates into mywalmart.com in early 2010. As expected, Walmart has had users requesting search for the social media content, but the outcry has not been overwhelming.

When search rolls out early next year, associates' posts can be searched. In the interim, the company has met the majority of the associates' search needs in two ways:

1. **A forum widget** organizes the forum content in digestible and relevant chucks. For example, the widget provides instant access to forum topics submitted by the associate or their friends. It also provides a real-time snapshot of all new post and most popular discussion topics

2. **An associate's profile page** functions like Facebook's *Wall* feature, letting associates see what their friends are posting without having to search for it within the forum.

### Search Technology

The technology behind the comprehensive search that the team is working on is Google Search Appliance (GSA). "We chose this tool because it can handle traffic requirements," says Reynolds. "And we consider GSA the standard in search." In addition to implementing the search appliance, the company is looking at other options to augment simple site search. "We're seriously looking at implementing an ad model that will increase marketing opportunities for associate discounts," says

Terry Homesley, Director Benefits Communications. “Walmart also plans to include a sponsored links model, which will feature content based on user search terms.”

Walmart doesn’t yet track which searches are most common.

The ad model Homesley referred to would work similar to Google Search results on the Web, except instead of other businesses buying the keyword ad spaces that appear around the search results, the company would post products and benefits associated with the search term. This in-house ad model will give associates greater exposure to benefits they might be unaware of, as well as products the company sells and associates might come in contact with.

## MOBILE

“Mobile access is definitely a goal for next year,” says Bliss. “Currently, the site is accessible and functional via mobile, however, we have yet to optimize it. The team is also considering adding mobile widgets for primary user tools such as pay stubs and work scheduling.”

## CONTENT MANAGEMENT

### CMS Technology

The CMS was custom developed for Walmart, using the following technology:

- ASP.NET
- VB.NET
- jQuery/JavaScript
- LINQ
- MS SQL Server

mywalmart.com has a multitiered content management structure. Following is a breakdown of various CMS areas and the functions they control:

- **Users/user-generated content.** Site administrators can search for individual users and view/edit any profile information as necessary. Administrators have a one-stop shop for viewing any and all of an individual’s activity, including previewing their public profile, what (if any) admin roles they might have, content they’ve generated on the site, and a history of their profile pictures. Questionable content can be moderated directly and notifications can be sent to a user either as a freeform message or via a template/form letter.
- **Site feedback.** Any feedback users leave can be viewed, assigned a reviewer, and given a due date. Any time a piece of feedback has a change in status or some action taken, that item’s history is updated with appropriate information for tracking progress.
- **Admin navigation structure.** Administrators can change the CMS navigation to a different configuration or order that better suits their preference or needs.
- **User-facing site navigation structure.** All but top-level navigation can be manipulated. New site sections are added with this tool, which also updates the site navigation menus and breadcrumbs.

- **Subjects (for taxonomy).** mywalmart.com is centered on a subject-based taxonomy. For example, blog posts and forums are assigned to the subject area that best represents the content, such as volunteerism or sustainability. Subjects can be added, deleted, or edited in this area of the CMS.
- **Email templates (for user notification).** Site administrators can send notifications to a user's personal email account through the mywalmart.com CMS. To improve workflow, administrators can create form letters for common notifications and simply fill in any necessary information and personalize the message.

### Content

The following content areas can be administered through the CMS:

- **Documents/pages (including descriptions of how the templates are integrated into the FCK editor):** The CMS allows administrators to create content pages at will. Administrators use a form to enter necessary metadata to identify and organize pages/documents and a freeform WYSIWYG editor to enter content. Style sheets are applied to keep all content consistent. To improve consistency beyond just styles, the editor allows the administrator to choose a template for content components, further solidifying a consistent experience throughout the site.
- **iSite configuration settings.** This area of the CMS is used strictly for setting technical configurations, not content. It was conceived as a work-around for some technical implementation that was restricted because of hosting arrangements.
- **Executive org chart.** This org chart lets users get to know Walmart executives through an interactive Flash application. Users can click on an executive to see the reporting structure around that individual and click through to read a bio.
- **Footer links.** Site administrators fully control footer links and can add, edit, or remove them.
- ***Associate Giving*.** This page displays associations with charitable organizations.
- **Categories.** Administrators can manage content categories for the organization.
- ***Fast Facts*.** Administrators can pull *Fast Facts* content onto the landing page from any subject area, remove it at will, and offer context by associating it with a particular subject.

### Community

Site administrators moderate content in the site's *Community* section as follows:

- **Inappropriate material.** Site users can flag user-generated content as inappropriate; this CMS area allows administrators to track content that has been flagged and to remove or reinstate that content when necessary. Content can also automatically be removed when the number of flags by users reaches a defined threshold. Content that has been automatically removed is also administered in this area.
- **Language filter.** All user-generated content must pass through a language filter before being submitted. This CMS area allows administrators to update the list of banned language as necessary. This tool prevents submission of content that contains forbidden words.
- **Shared story moderation.** Users shared stories are submitted to be approved before being displayed on the site. In this area, site administrators review and approve or reject shared stories.
- **Profile photo monitoring.** User profile photos are posted without active moderation on mywalmart.com. Photos are reviewed by a site administrator daily, after they go live. This interface allows for quick batch processing and avoids requiring the admin to review the same photo more than once.
- **Video chats.** Users on mywalmart.com can submit questions through the site to visiting celebrities or executives who answer them in either live streamed or pre-recorded video. This CMS area allows administrators to schedule chats and moderate the questions users submit.
- **Blogs.** Each subject area on mywalmart.com has a blog; this CMS area allows for the creation of blog posts as well as moderation of comments when necessary.
- **Forum topic approval.** This area provides a quick way to review forum topic requests submitted by users. Upon approval the thread is added to the appropriate subject area.
- **Forum response approval (for actively moderated forums).** To date, mywalmart has never proactively moderated responses to the site. Responses to forum topics appear on the site in real-time. Associates self-govern content, while a community manager passively follows discussion threads. However, capability exists to set a forum topic to be "actively moderated," this area will show all responses to that topic. Upon approval, the posts are made live on the site.
- **Resource management (photos and documents).** This is a central repository for images and documents used throughout the site. It provides for file upload and associating necessary metadata with a resource.
- **Homepage management.** This area lets administrators manage the elements that appear on the homepage.

## Content Owners

Because mywalmart.com incorporates content from many areas of Walmart, the list of content owners continues to grow as the site gains visibility and buy-in across the company. As of this writing, the following site areas receive content from the following departments:

- ***Benefits*:** Benefits Communication
- ***Volunteerism*:** Walmart Foundation, Global Associate Communications, and *Walmart World*
- ***Sustainability*:** Business Sustainability, Global Associate Communications, and *Walmart World*
- ***Civic Duty*:** Corporate Affairs (including Advocacy & Outreach, Public Affairs, Government Relations, and Constituent Relations)
- ***Around Walmart*:** Marketing, Merchandising, Ethics, Privacy, Pharmacy, walmart.com, and Operations
- ***Entertainment*:** Marketing, Merchandising, walmart.com, and Shows & Events
- ***Life*:** walmart.com

## Editorial Schedule

A cross-functional group led by Corporate Communications manages the site's editorial calendar. This team includes members from Benefits Communications, Corporate Affairs, Operations, walmart.com, Marketing, and Government Relations. The team's members meet biweekly at an editorial calendar meeting led by the Senior Content Manager. There, they discuss and finalize site content options on a two-week (in advance) basis. So, for example, content options for September 15–30 are discussed at a September 1 meeting. Site content is refreshed at least every two weeks to coincide with the site's peak traffic timeframe (the weekend when associates can view their online pay stub).

Because of the constant need to develop and deliver relevant site content with limited internal team resources, Walmart adopted this method to refresh and update various sections of the site. It also helps to increase stakeholder engagement with the content relevant to their business areas.

Content options are based on upcoming events and initiatives relevant to the content owners' business areas. After the editorial meeting, a final content task list is created on the mywalmart.com team's SharePoint site for all content owners to review and track their progress. The Senior Content Manager works with content owners to coordinate content (blogs, forum topics, images, banners, legal review, and approval).

## Maintaining Editorial Standards

For mywalmart.com to remain a vital part of the Walmart associates' online resources, the company must work hard to keep the site both fresh (in terms of content) and consistent (in terms of corporate message and tone). As Newton explains, there are three key areas related to maintaining that consistency:

- **Voice.** "With blogs and forums, we use a personal tone and voice that avoids a 'corporate' feel," says Newton. "We found that associates think 'personal, local, corporate, then global,' whereas the Home Office thinks 'corporate, global, local, then personal.' For associates to listen to our company, we needed to reposition content in a way that invited associates to listen and exchange dialogue."

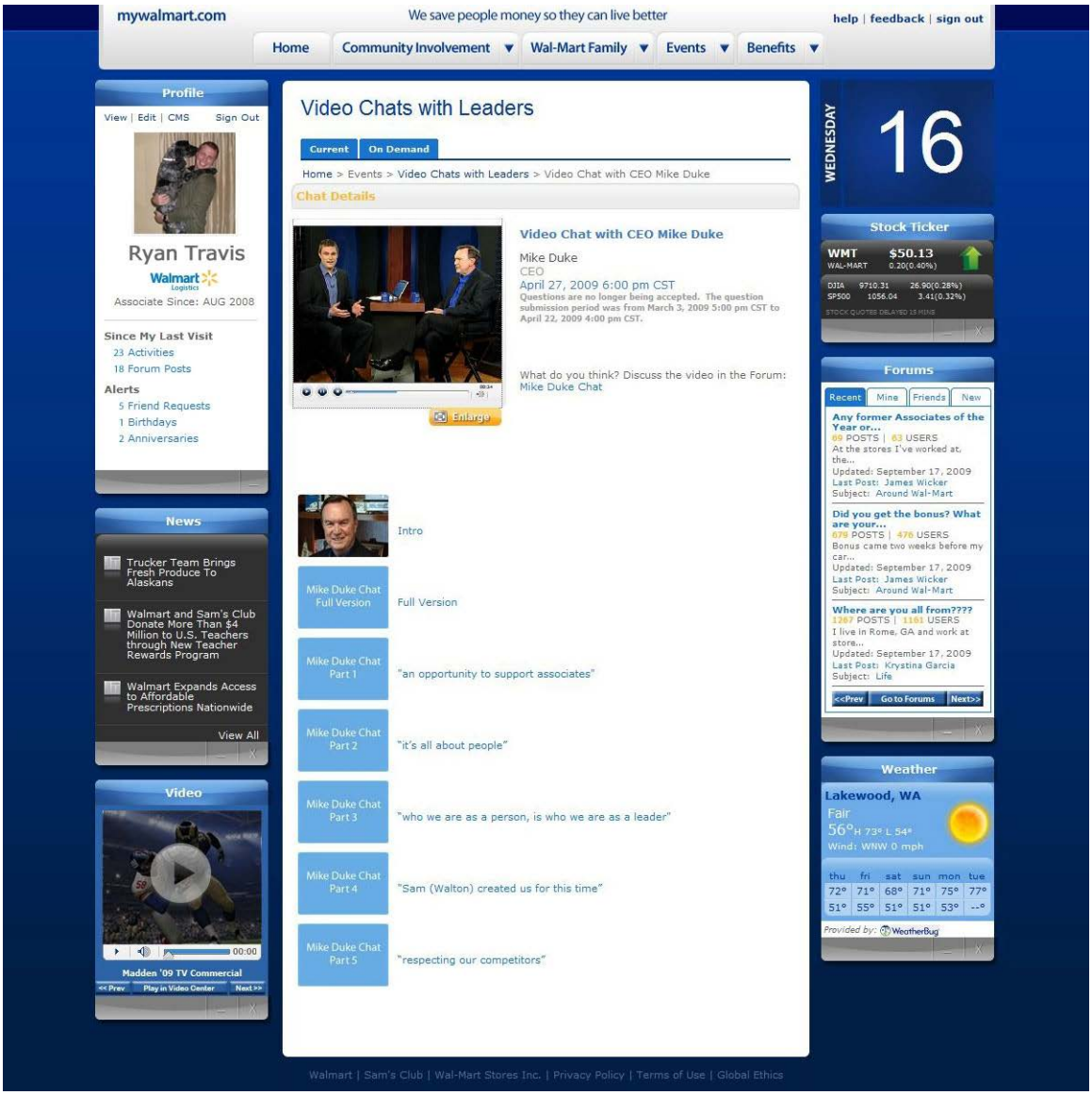
- **Look and feel.** All graphics adhere to Walmart's corporate brand guidelines to maintain a consistent look and feel (font, color, and photos).

**Consistent moderation.** The mywalmart.com team developed a set of community manager guidelines, including moderation guides and standard email "situational response templates." These are built into the CMS and managers can access them from any user-generated content location. Because the templates are built into the CMS, it's easy to enforce and distribute them as needed. All correspondence is archived on a per user basis.

## FEATURES

Because the site is new and still evolving, many interesting features will be added soon. Some of the current features include:

- **"Look who's talking"** shows profile thumbnails of people involved in a forum conversation.
- Essential **user management tools** in the CMS include email templates, email history, and a profile photo manager.
- **Content and fact sheets** from Walmart's corporate site are pulled into the intranet using subject area tags. The walmart.com *Ratings and Reviews* link takes users to the external retail site's *When you're the customer* section.
- **Forums** are one of the site's critical features. They provide value to the associates and account for a significant portion of the site's traffic. "The walmart.com forums revealed a gap in associate understanding and illuminated false assumptions on our company's part," says Bliss. "When we created an environment where associates go for trusted information, repeat traffic rose. This gave our team an audience for corporate messages and exposure to programs associates might not have known about otherwise. Also, creating relationships on the site reduces the perception gap between different branches of our Walmart family."




Pictured: Celebrity and executive Web chats can be hosted on mywalmart.com, both live and taped. The site has featured chats with CEO Mike Duke and NASCAR Driver Jeff Burton, for example. An easy-to-use video player allows associates to watch in real-time and ask questions or watch later at their leisure.

## Personalization and Customization

At this stage of the site's development, customization and personalization features are limited. So far, associates can select and arrange widgets on the homepage; create public profiles to store photos, work history, facility, and hometown; track friends' activities; and keep track of birthdays and anniversaries. Users can also create friend filters for forum content and create personal playlists in the video center.

Pictured: The discussion forums are the most popular section of mywalmart.com, so the team created a forum widget that displays on the homepage. It gives associates an immediate snapshot of the most interesting topics. The widget has four tabs: *Recent* displays the most recently discussed threads; *Mine* displays topics the user has personally submitted; *Friends* are topics the user's "friends" have commented on, and *New* shows the latest topics posted to the site. Since this feature went live, activity in the forums has greatly increased.

Even with limited personalization, users want what they want and there's a risk to corporate content if users can just bypass it as they seek out their preferred content areas. "Although we're proud of how we've evolved our major landing pages into topic-based social network hubs, associates prefer navigating directly to blogs and forums they're interested in versus first visiting a topical landing page," says Travis. "We redesigned the homepage to better support a more direct user content navigation approach. This brings blogs to the homepage and access to popular

content such as the forums via widgets. The trade-off is less exposure to corporate 'support' content and fact sheets, but better UI."

Throughout initial design and testing, Walmart learned it was critical to "ladder up" and let navigation and design follow the hierarchy of user interest:

1. Themselves
2. Their friends
3. Their immediate coworkers
4. People elsewhere in the same job
5. Their facility
6. Their company in the US
7. Their company around the world

"Usability tests proved that our associates were not interested in simply being told corporate information," says Reynolds. "They wanted to interact with each other and be a part of the conversation."

This is a challenge for the organization, because the business need is—at least in part— to communicate information to users. "The most challenging aspect of personalization is that it does, to some extent, diminish control over content, resulting in uncertainties related to strategic messaging in communication campaigns," says Travis. "We are investigating how personalization affects site usage metrics and if it makes some metric data too ambiguous to be useful."

It's a delicate balancing act because users want personalization (and choice) as much as companies want to control the experience.

"It's tough to figure out the right level of personalization," says Bliss. "We want to have a useful site for both the company and our associates. This site is not just about providing social networking functionality, but giving associate information and a voice. If we design for 100 percent personalization, they [the associates] may not set up their page to get new information about the company. There needs to be the right mix, where associates control the content they receive, but where we can still make sure they get the information they have told us they want."

Achieving this balance is an ongoing challenge and one that the Walmart team has not solved quite yet.

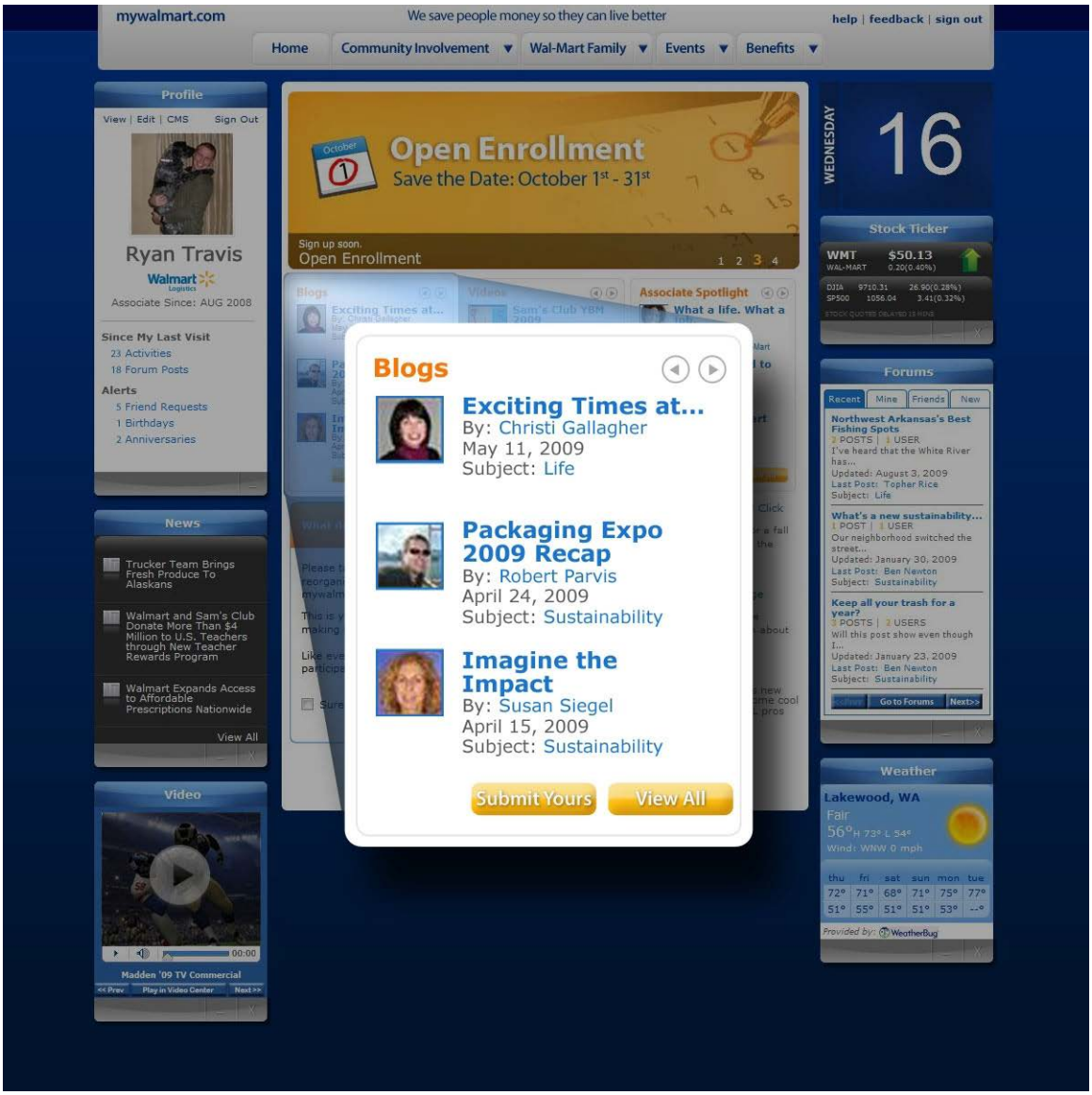
## Enterprise 2.0

While most company intranets are just dipping their toes in the water when it comes to social enterprise tools—toying with a feature here, or a set of features there—mywalmart.com was built from the ground up to support online social interaction among associates.

"Most of mywalmart.com is built around the use of Web 2.0 features. Almost every facet of content is related to some sort of social media component, with an eye toward user engagement and interaction," says Reynolds. "For example, an announcement about a new corporate initiative will have a comment section on the same page. These features were all a part of the roadmap from the inception of the project."

The company's senior management has stated that this is a space Walmart must be in to be both competitive and relevant.

Pictured: Each blog is written from the perspective of an associate rather than from a "corporate position." The blogs are designed to start from a personal perspective, then ladder up to the local, corporate, and global impact. This approach reflects a key finding from the team's usability study: associates think first in terms of the individual, then the store, the corporation, and lastly the larger global impact. Previously, the intranet showcased content from the perspective of the corporate, global, store, and finally the individual.




Pictured: The most recent blog entries appear on the site's homepage. If an associate doesn't select a blog, three new blog options display when the homepage is refreshed.

## Engaging Stakeholders

While designing and developing the site, the team spent a significant amount of time meeting with individual stakeholders and company leadership to align goals and expectations for the site. This process helped ensure that as the site was planned, designed, and built, everyone's concerns were taken into account and addressed. It also helped ensure that leaders at all levels were aware of the project and saw it as a communications resource that they can leverage if they wish.

This seems to have worked. The intranet team was able to work with executive leadership to create special biographies for the site that give associates insight into executive personalities, not just their qualifications. The company's CEO and COO have used the site to host special chats for associates. Clearly, company leaders are

just beginning to exploit the possibilities presented by this new communication channel.

## ROI

### Measuring Success

Currently, mywalmart.com is primarily measured based on its ROE: return on engagement. The Walmart team has encountered the holy grail of intranet development: how to measure success.

"Metrics are very challenging, and many programs are too new to show trends," says Reynolds. "Our team currently relies on conversations to determine what's important to associates and extrapolates from that the effectiveness of our messages."

Relying on user satisfaction and usage is often the next best thing to hard numbers. And by these measures and by all accounts, mywalmart.com is a success so far.

"Participation on mywalmart.com exceeds industry standards and is considered a benchmark for success," says Reynolds. "Additionally, Walmart measures page views on campaign assets—and participation in forums and blog comments on those same topics." The company measures the campaigns against one another and creates its own benchmarks.

"Determining hard ROI is a deliverable and in our roadmap for next year," said Bliss. Analysis projects that mywalmart.com is on track to deliver returns for the company equaling at least 10 times the cost of development. "This kind of result could not be accomplished without the partnership of key areas of the company—Benefits, Operations, Marketing, and HR to name a few. Working cross functionally toward a common goal is the key to delivering real and long term ROI."

| METRICS | | |
|---|---|---|
| **Metric** | **Goals for first year** | **Progress: first eight months** |
| **Page views per month** | 2 million | 1,784,696 million |
| **Registered associates** | 400,000 | 565,510 |
| **Public profiles** | 100,000 | 101,321 |
| **User-generated content** | 5% with public profiles | 43% with public profiles |
| **Increase off-pay cycle visits by 10%** | 28%<br>(90% return every 10 days) | |

Other measurable results include:

- mywalmart.com currently has 565,510 registered users
- Since its launch, traffic to Walmart *Benefits* content has increased by 20 percent
- 43 percent of associates with public profiles have submitted some kind of content

## Establishing Goals

The following goals have been set for the intranet team to work toward:

- Five percent of total associate traffic will engage Walmart's ecommerce site (walmart.com) as well as government relations and marketing initiatives
- Associate opinion surveys for registered users will increase by five percent
- The site will achieve a five percent increase in awareness of key issues related to the company's directives, including sustainability, health care, community, and opportunity.

A more intangible, but no less important goal of the site is to empower associates to share their thoughts and influence their community of peers beyond the geography of their own store.

"Before mywalmart.com, associates weren't able to belong to and influence a community of associates beyond the walls of their facility," says Bliss. "Walmart associates grow with the company. mywalmart.com helps them stay in touch with people they have worked with in the past and connect with other associates who they otherwise may never have known."

## User Feedback

Another important measure of a site's ultimate success comes from user satisfaction, and mywalmart.com has achieved a high level of that as well. The following comments, pulled from users on various parts of the site, illustrate this success (we've omitted last names here to protect users' privacy):

> *"I think this is great. I'm hooked! It is so cool because it is only for Walmart associates, which gives us common ground and links us together like a family. You get to find out that there are other associates that are going through what you're going through and can offer advice or encouragement. Thank you for creating this unique site!" (Sharon)*
>
> *"I check out the forum daily. Don't comment daily but I do go back to the last time I remember checking to make sure I don't miss anything. It's been fun meeting and chatting with many." (Dan)*
>
> *"I find myself coming in to mywalmart about every time I check email or Facebook. Sometimes I stay awhile if there are interesting conversations going on. I do look forward to being able to connect directly one on one with like-minded people. Thank you Walmart for providing this forum that we can meet our coworkers that we might otherwise never have the chance." (Katie)*
>
> *"I would like to say how much I love the concept of communicating with fellow associates. I have always thought of my store as a big family. In my first year of employment I was given the honor of going to a year-end meeting. There I realized just how big this family is and that just like at my store, the feeling of family was experienced in that few days with thousands of associates from all across the world. I like, that for a company this size it still feels so personal and small. I really enjoy hearing everyone's opinions even the ones I do not agree with : ) I am very excited to watch this site grow. I have always said the only thing*

*consistent about Walmart* is change. Thank you Walmart* once again for being consistent, I LOVE it. What's next? : )" (April, forum post)*

## BEST PRACTICES

In developing mywalmart.com, the team learned some valuable lessons that they've translated into best practices to share with other intranet development teams:

- **Build a base.** "When getting into social media, start at the point where you are only slightly out of your comfort zone. Once you prove to the organization that 'the sky won't fall,' begin layering on greater functionality."
- **Let the community lead.** "Adapt first to where your community leads you, or they won't follow you when you want them to."
- **Trust the community.** "Have the courage to permit dissent, and permit the community to self-correct."
- **Enhancements should be ongoing.** "Anticipate the need to produce and rollout enhancements often and with limited development time."
- **Build trust by interacting.** "Personalized, timely feedback to users is essential to maintaining trust."
- **Make sure moderation is bulletproof before you need it.** "Make sure moderation standards are solid for all anticipated scenarios before rolling out a social network. Do fire drills and test all built-in moderation tools in your CMS. The mywalmart.com team has rarely needed them, but it helps everyone sleep at night knowing they are prepared."
- **Archives should be part of the launch plan.** "Anticipate server space to archive everything, especially user-generated content, feedback, and correspondence indexed with each user. This way, future correspondence with the user can accurately reference past interactions in the proper context."
- **There is no such thing as done.** "Your site will never be complete. It's a constant evolution. Make sure your leadership and tech support realizes that they're in it for the long haul and that budget and resources are appropriately allocated."
- **Usability is ongoing, not a one shot deal.** "Ensure ongoing usability is a part of your cycle of continuous improvement."
- **Know your culture and plan accordingly.** "Depending on your culture, it may make sense to moderate more aggressively initially. Doing so could help you establish the tone and site culture you desire. Associates will follow their peers' behaviors."
- **Make attribution required.** "Not allowing anonymity drastically cuts down on inappropriate content. There is a marked difference in quality between anonymous feedback and profiled forum content."
- **There is no such thing as done—REALLY!** "Your site is *never* complete! Yes, it's been said already, but it bears repeating."

## LESSONS LEARNED

Sometimes the things that go wrong teach the best lessons. The Walmart team, like many others, encountered a few stumbling blocks along the way, including:

- **Employ metrics early.** "In order to get quality data, we should have developed better tracking metrics earlier in the process."
- **Know how to interpret the numbers—from the start. "**Staff should be trained on how to interpret the metrics prior to launch; the process moves too quickly afterwards."
- **Don't lose valuable feedback.** "When forum conversations move to the next page, new contributors miss previous administration messages. Given this, we should have launched with 'sticky posts' (always at the top of the page) for administrators to support forums that tend to veer off topic or press the boundaries of site policies. This would have been especially useful when the site was new and users were first getting acquainted with the culture of the forums."

### Surprises

Along the way, the mywalmart.com team also came across a few surprises:

- The adoption rate was greater than expected
- Associates actually welcomed moderation based on Walmart's primary "respect for the individual" core value
- The quality, scope, and popularity of forum conversations has been greater than expected

# Staples, Inc.

**Using the intranet:**
Staples, Inc., and subsidiaries operate as an office products company, selling various office supplies and services; business machines and related products; computers and related products; and office furniture. It also provides high-speed, color, and self-service copying; other printing services; faxing; and pack and ship services.

**Headquarters:**
Framingham, Massachusetts

**Number of employees the intranet supports:**
55,000, with plans to expand to 90,000 by the end of 2012

**Company locations:**
Staples operates in 26 countries throughout North America, Europe, Australia, South America, and Asia.

**Locations where people use the intranet:**
Across the US, with plans to expand to employees in Canada, Europe, Australia, South America, and Asia by the end of 2012.

**Annual sales:**
$25 billion (FY2010)

**Design team:**
In-house, 12 people formed the core team, working across five departments. TandemSeven conducted research and handled IA and visual design.

**Members:**
**In-house:** Chris Pickett, Project Manager; Melissa Shore, VP HR Strategy & Analytics; Bob Solomon, IT Director; Kunjan Jhaveri, IT Director; Joanne Donahue, Director, GHRT; Tom Tobin, Director Creative; Johanna Sheyner, Senior IT Manager; Nirmala Kulkarni, Solutions Architect Portal; Jim Hallock, Creative; Andrea Quinn, Manager US Retail Communications; Rick Sy, HR Consultant Business Systems, GHRT; Lajaun Case, Senior Analyst GHRT; Lindsay Germanos, Project Manager Portal Content, GHRT; Tatum McIsaac, Manager Communications; Pam Cayem, Director Communications; Eric Chang, Project Manager Communications

**Other core team members:** Paul Isgro, Associate Analyst, GHRT; Scott Deitemeyer, Manager, HRIT; Roger Mann, Developer, HRIT; David Allen, Developer, HRIT; Swati Bagchi, Developer, HRIT; Aju Jacob, Developer, HRIT; Kumar Teppa, System Admin, HRIT

**TandemSeven:** Steven Wyman, VP & Project Manager; Karin Kawamoto, Principal User Experience Architect; Dan Liliedahl, CTO; Aubrey Bowser, Lead Visual Designer

## SUMMARY

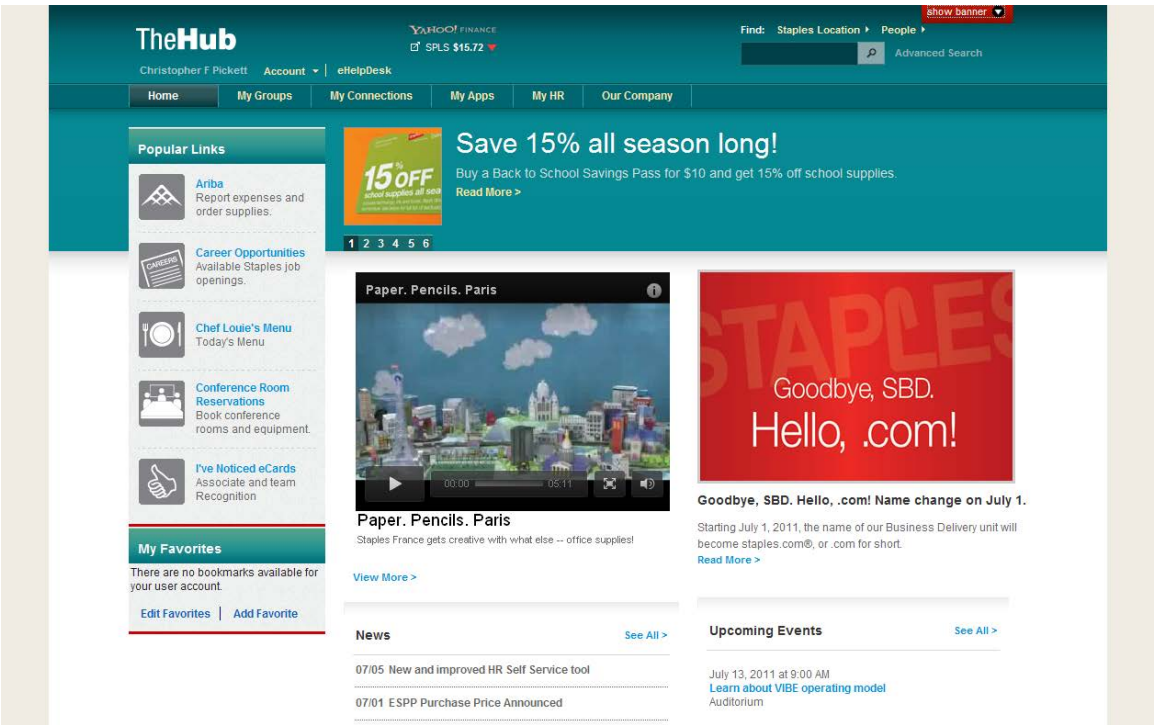
The Staples intranet fosters a sense of community by providing a number of social features that all employees can use. Unlike some large companies, this organization encourages professional and personal information sharing, demonstrating that it values people as both workers and human beings. The intranet is fittingly named *The Hub*, as it is the nucleus for online sharing at Staples.

The Hub designers demonstrated extreme discipline on the homepage, focusing on a few pieces of content and a simple layout. The page shows popular links, including tools such as reporting expenses, seeking career opportunities, reserving a conference room, and sending an eCard.

Employees can add and access their favorites in the *My Favorites* area in the lower left. Clearly, tools are well covered on the homepage.

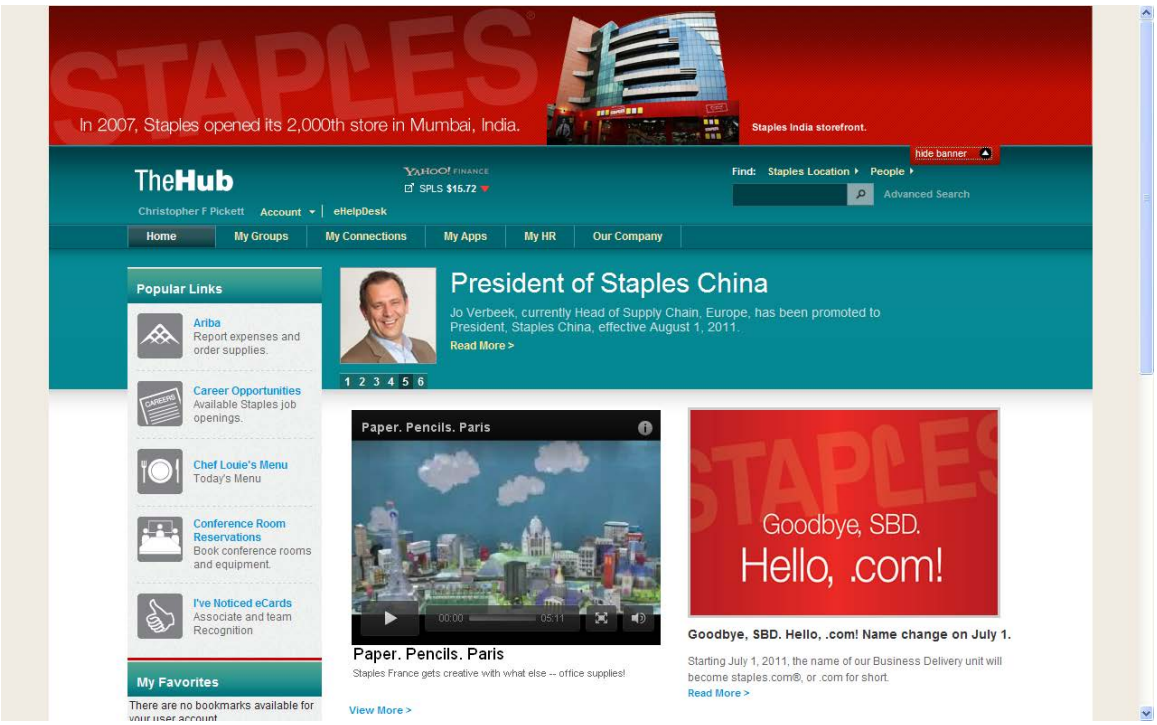
As for company news, people can keep conversant easily. There is space for six spotlight news and promotions in the carousel at the top, and two other select pieces of news or video appear in the main content area. Below that are a few select news headlines and upcoming events.

Sections headlines are easy to read, written in sans serif fonts in dark text on a light background.



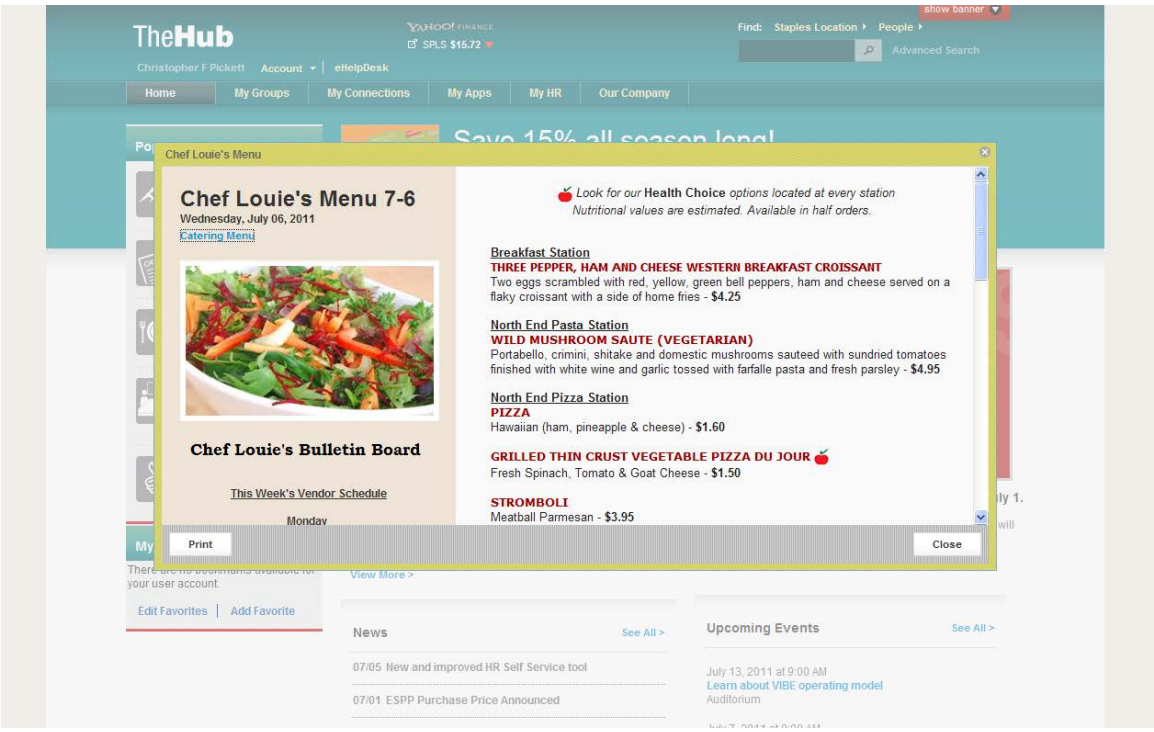

Pictured: The homepage shows links to important applets on the left and news in the center.

In keeping with brand guidelines, the designers present a large, Staples-red banner at the top of the page. However, concern about pushing the content below the fold gave designers an idea to make the banner collapsible via the red *hide banner* button (which shares the button with its inverse command, *show banner).* Resourceful features such as this account for user needs without flouting branding guidelines.




Pictured: Users can collapse the red banner at the top, via the *hide banner* button, to show more content.

The cafeteria at Staples headquarters is a social place, and is literally and figuratively the central point between the wings of the building. People go there to meet, mingle, and of course, eat. Because this area is known to be important, designers decided to represent it on The Hub. The menu was always a popular piece of content with employees; thus, *Chef Louie's Menu* was promoted in an icon on the homepage. Clicking it opens a window with the date and a scrolling list of delicious dishes. Each meal is given a title, description, and price, as well as a note if an item is vegetarian or a tomato icon if the item is a healthy choice. A link to the *Catering menu* makes business lunch meetings easy to plan.



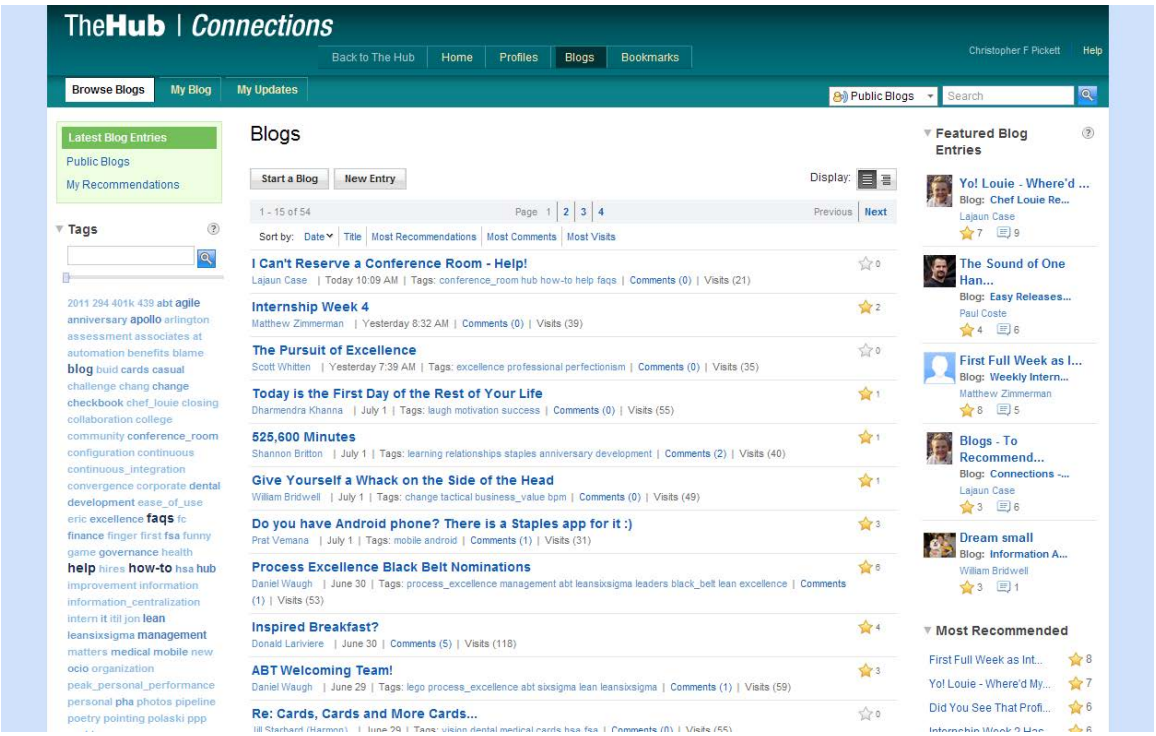

Pictured: *Chef Louie's Menu* describes the cafeteria's meals and lists prices.

The cafeteria isn't the only place to socialize at Staples. On The Hub, employees can blog about work topics or any other messages they want to share; they can also comment on other people's blogs.

Clicking the *Blogs* link lets users view all blogs or their own blog. Users can start a blog here or add a new entry to an existing blog.

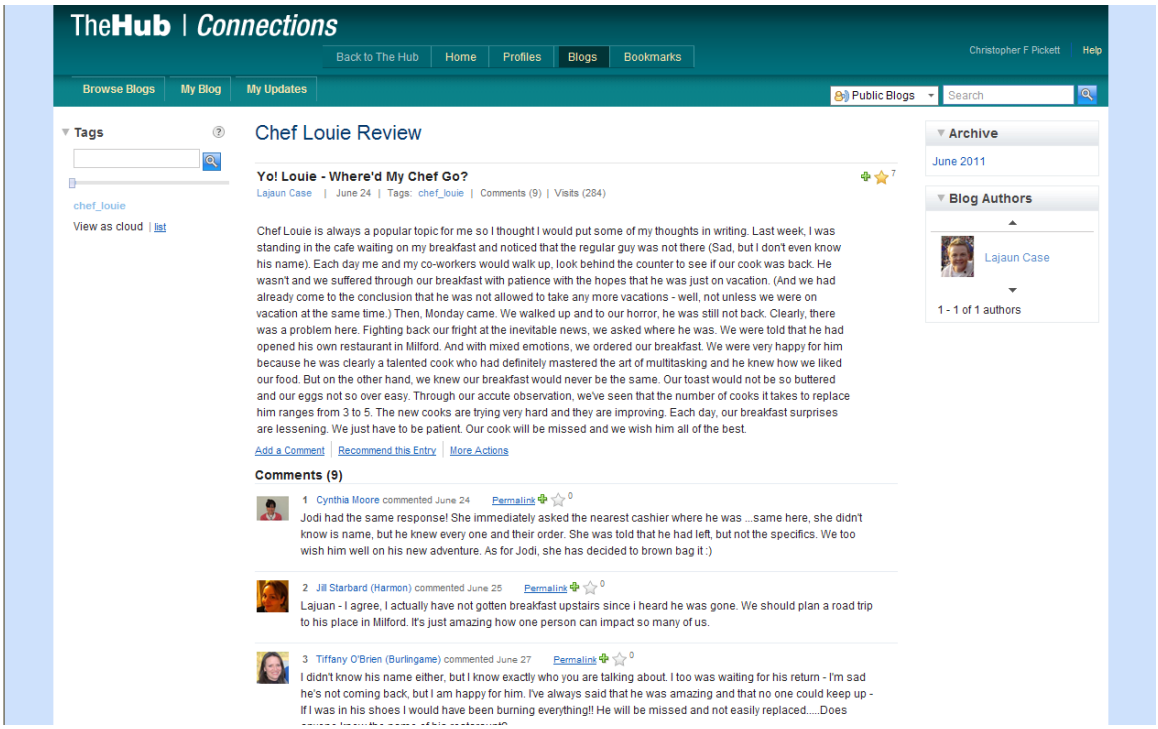
People might find blogs they are interested in the *Featured Blog* Entries area in the right rail; or they can sort by date, title, most recommendations, most comments, and most visits. These choices help users find what is often the most fascinating content, or at least the kind of content that their colleagues are paying attention to, which can be telling in itself.

Each blog is presented as a link, accompanied by the blogger's name, the date and time of last entry, a list of tags, and the number visits and written comments.




Pictured: People can sort the many blogs by categories, such as *Most Comments* and *Most Visits.*

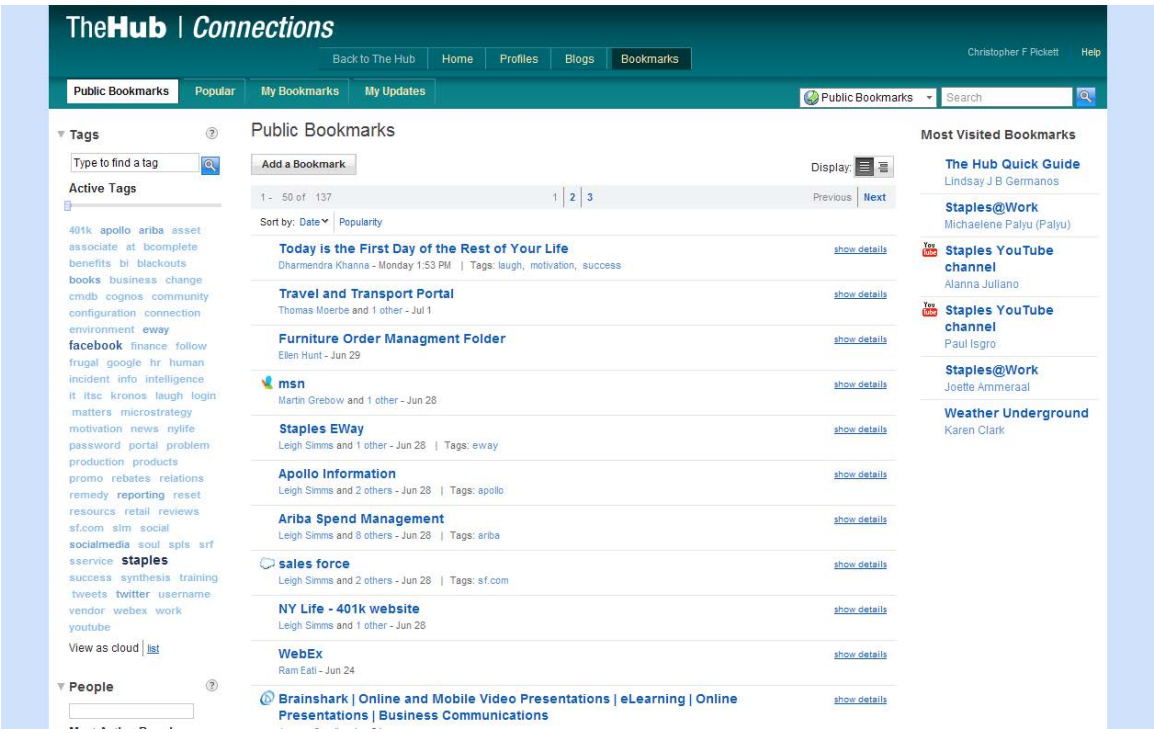
The ability to comment on blogs creates a sense of community online and gives people the opportunity to help one another and share ideas and opinions.



Pictured: A blog about one of the cafeteria chefs who left to open his own restaurant got a lot of activity.

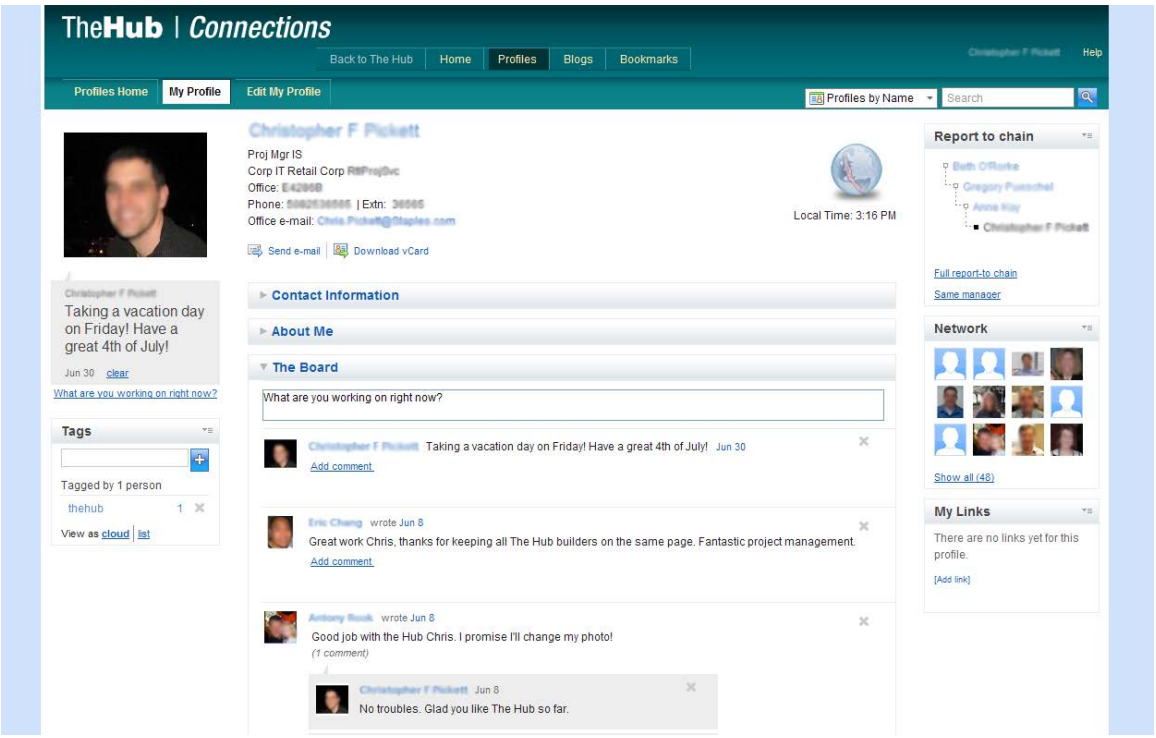
Tags are another social feature on The Hub. Users can search for tags or choose popular tags from a tag cloud.

The Hub also considers employee usage in providing social bookmarks. Clicking a *Bookmarks* tab leads to different categories of bookmarks that employees can appraise, including ones that are public, popular, and most visited. Users can also view their own bookmarks.



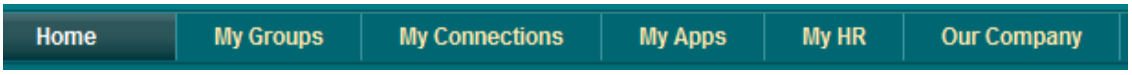

Pictured: The Hub provides searchable tags, as well as popular, public, and most-visited bookmarks.

*The Board*, located on each user's individual *My Profile* page, is one more place where people can share. A gray box under the person's picture notes the most recent post he or she has made, and the comments stream makes it easy to see the person's current status. People can also write information in the *About me* section, and create a network of colleagues and friends. The *Report to chain* is a nice feature that shows a small slice of the corporate org chart where the person fits in.




Pictured: *My Profile* documents include the necessary contact information, plus a wall feed where people can share their thoughts.

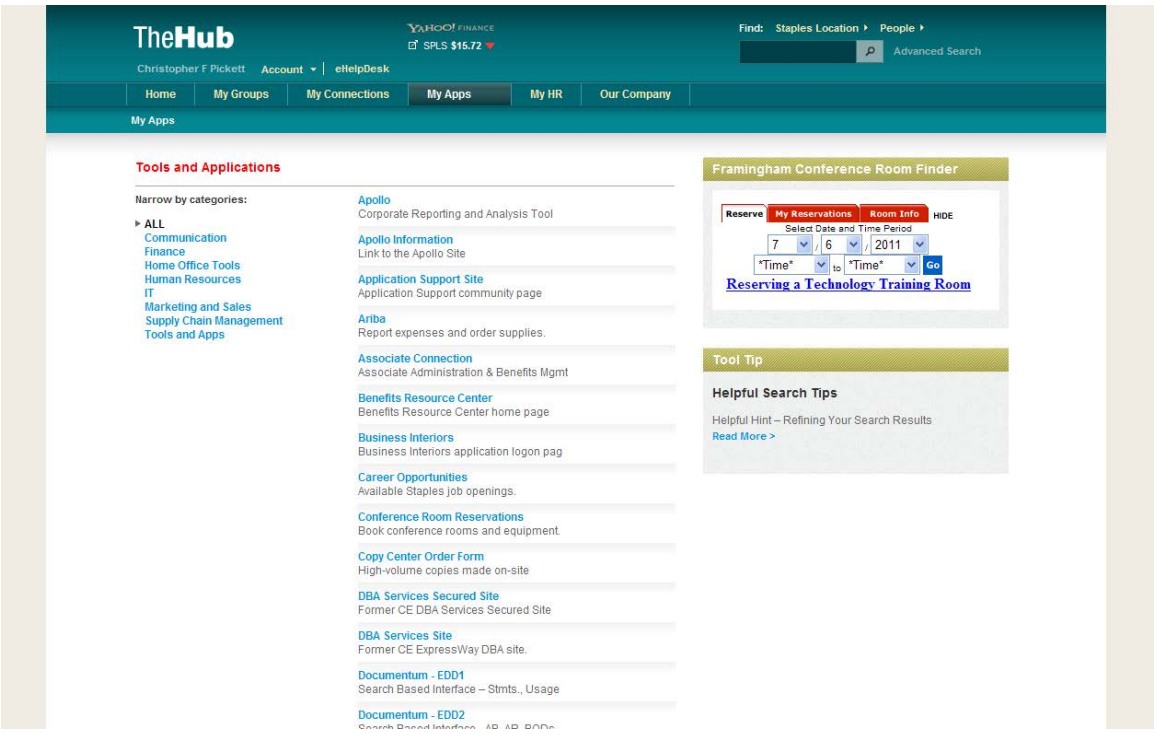
The Hub supports 55,000 diverse users, from corporate associates in roles such as finance, legal, IT, marketing, and senior executive; to retail store associates, who work on registers, stock shelves, support the copy center, and repair computers; and distribution center employees, including regional management, truck drivers, and warehouse workers. With such a wide variety of people logging in, it certainly helps to target content. Content is adapted for and customized by each user, as hinted to in several of the main navigation menu names: *My Groups, My Connections, My Apps,* and *My HR.*




Pictured: The tier-one menu items include Home, My Groups, My Connections, My Apps, My HR, and Our Company.

The *My Apps* page is basically a central repository for the numerous tools and applications that Staples employees might need to do their jobs effectively. The tools are listed alphabetically by default, but can be filtered by department using the links on the left.

Knowing that the conference room finder is one of the most important applets, designers positioned the tool itself, rather than just a link to this tool, on the *Tools and Applications* page. Here, an employee can select a date and time to reserve a nearby conference room, review an existing reservation, and get information about conference rooms.




Pictured: Employees can view the many tools and applications by alphabetical listing or filter by department.

The interpersonal aspects of office life don't always happen face-to-face. In today's business environments, especially at large organizations, they simply can't. The Hub provides an opportunity for the many people who don't work on the same team or in the same office—and thus would probably never get to know one another otherwise—to become close colleagues. These relationships—forged in person or online, but certainly reinforced on the intranet—can increase employee satisfaction. They can even increase productivity as employees get to know more people they can ask work-related questions of and share their own knowledge with. Other large organizations can take a cue from Staples and The Hub's bright success.

## BACKGROUND

The portal team wanted to make a big impact with the release of the "Next Generation Portal" for Staples and upgrade the look, feel, and user experience for The Hub. "We made this one of our project's guiding principles," says Johanna Sheyner, Senior IT Manager, Portal Labor System. "Wow factor: make our associates realize they are not in Kansas anymore!"

The team wanted to make sure that the portal that resulted from their efforts would engage associates and be an integral part of their day.

The portal initiative coincided with a branding initiative intended to extend the brand's global access, as well as leverage new technologies being implemented across Staples.

Other factors driving the latest redesign included:

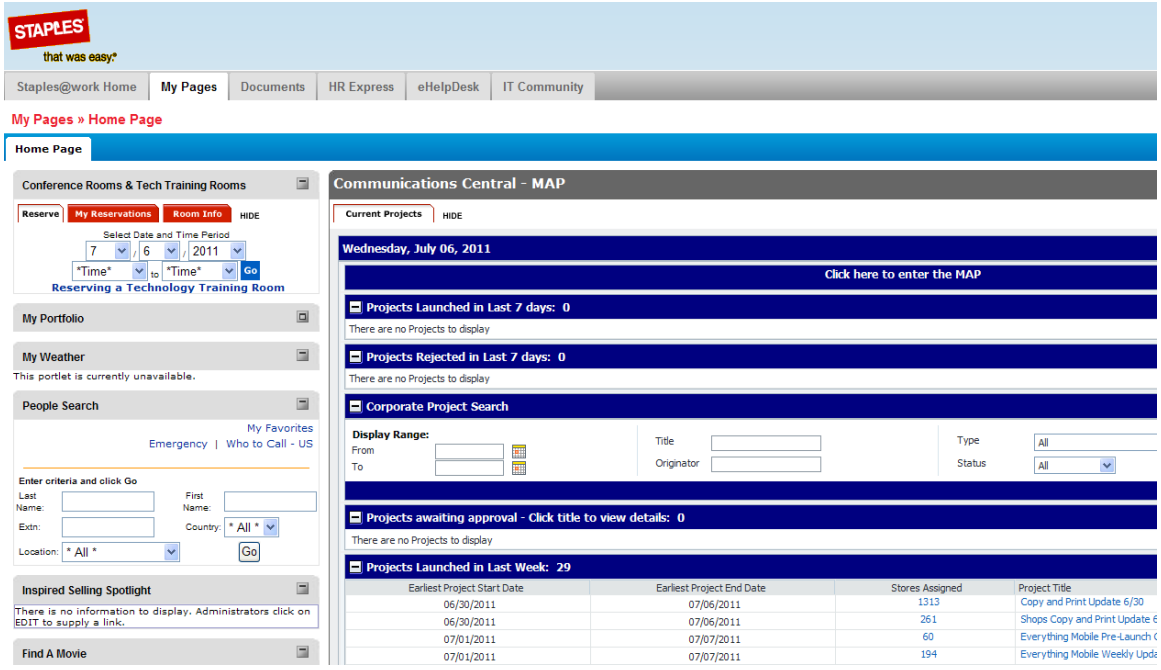
- **Portal platform retiring.** Staples legacy portal platform was at end of life for vendor support.

- **Search lacking.** Search capabilities on the legacy portal platform were seen as antiquated and search results as inaccurate. Business partners wanted enhanced search capabilities
- **Need for integrated content management.** To improve search, the company needed to build a portal platform that was supported and tightly integrated with a CMS. The legacy portal platform was supported only by content placed and crawled from a fileshare system.
- **Unified communications.** Another driver behind the intranet project was the need to transition to a single eco-system for all communications, collaboration, and team activities. There were up to 10 separate portal platforms in place when the redesign project began. By unifying the company's communications tools, the company could eliminate ongoing maintenance and support costs.
- **Improve user experience.** There was a desire for an improved and updated user experience to fully engage associates with dynamic content.
- **Incorporate social tools.** The company was eager to incorporate social collaboration elements into the portal so associates could better share ideas, engage with each other, and share collective knowledge. The hope was to use these tools to benefit the business through gains in associate productivity, innovation, and morale.

## Project Goals

Sheyner discusses the project goals:

- **Establish a single communication ecosystem.** The Hub, Staples Next Generation Portal, is a three-year initiative to fully implement a single portal platform for all Staples associates worldwide (90,000), allowing them to access collaborative services, content, applications and processes efficiently and consistently. Its goal is to create one portal ecosystem that encompasses optimizing core business processes; connecting associates to critical information, expertise, and applications; reducing information overload; and increasing productivity through efficient searches.
- **Break down geographic divides.** The new portal provides capabilities that will allow every associate, regardless of geography, to enable and promote teamwork, establish $360^0$ communications, and increase their productivity. It also provides the ability to accelerate and automate business processes to meet current and future opportunities.
- **Break down silos.** The Hub is a unique example of an internal portal that not only provides employees across Staples with important, traditional company information, but also offers useful tools and assets that store associates use to service customers at the point of sale.




Pictured: A look at the portal The Hub replaced. This first effort was a result of putting old portal content onto the new platform completely "as is," without customization of the look and feel or any of the functionality.

## INTRANET TEAM

tandemseven

Pictured: The Staples intranet team (back row, left to right): Paul Isgro, Kunjan Jhaveri, Rick Sy, Tom Tobin, Bob Solomon, Chris Pickett, Lindsay Germanos, Jon Polaski, Joanne Donahue, Diane Shelley, Roger Mann, and Kumar Teppa; (front row, left to right): Melissa Shore, Johanna Sheyner, Swati Bagchi, Tatum McIsaac, Nirmala Kulkarni, Lajaun Case, and Pam Cayem. TandemSeven (top): Karin Kawamoto; (bottom): Dan Liliedahl and Steve Wyman. (Not pictured: Aubrey Bowser (TandemSeven) and Arnaud Jammaers (Staples).

## GOVERNANCE

### Ownership

The Human Resources IT Department (HRIT) owns the corporate intranet. This team sits within Corporate Systems in the IT organization and supports the HR function at Staples Inc. The HRIT and Global HR Technology (GHRT) teams work collaboratively to set the ongoing strategic direction and roadmap for The Hub, providing recommendations to the Executive Governance Committee on go-forward strategy based on key business goals and objectives.

The HRIT and GHRT teams have been supporting the corporate intranet portal space since the establishment of the first Staples portal, back in 1999. “Given 12 years of experience within the space,” says Sheyner, “these teams are uniquely positioned to ensure that all parts of building and supporting a successful portal platform were analyzed and designed in way to ensure platform scalability (to a global audience), extensible (ability to establish a presence for LOB or teams not currently using the intranet, for example, international associates), and maintainable on an ongoing basis (governance process to continually refine and update portal content and search results).”

The team took the following into consideration before embarking on the redesign:

- Branding and marketing for The Hub (adoption)
- Usability and navigational design
- Information architecture
- Search experience
- Content authoring experience
- Governance and best practices
- Reporting and analytics
- Support for multimedia (video, podcast, polls, surveys)
- Social business and collaboration tools
- Teaming spaces
- Training and FAQ documents
- Self-service orientation to post content on the portal (work currently in progress)
- Platform and infrastructure support

In addition to the oversight of the HRIT and GHRT teams, the Internal Communication and Retail Communication teams were intensely involved during the

redesign project, designing The Hub's Core Foundational elements; providing input into the look and feel, usability, overall design, navigational framework, naming, and branding of The Hub; and taking direct responsibility for driving site layout for the corporate and retail homepages. The Internal Communications and Retail Communications teams now actively manage content for their respective sites. The head of the Internal Communications team, Melissa Shore, VP HR Strategy & Analytics, is the head of the Executive Governance Committee.

In tandem with building out new functionality and enhancements on The Hub—as well as rolling out The Hub to the company's 90,000 global workforce—the HRIT and GHRT teams are driving a parallel work stream to begin transitioning about 12 years worth of content from the legacy portal platform over to The Hub.

"We will be working with site owners and content owners to clean up outdated content before a transition is made to The Hub," says Sheyner. "As new Hub sites or new Lotus Connections communities are created on The Hub as a replacement for the legacy portal community, GHRT and HRIT will work with each group to provide the toolkit each site owner/content owner will need to get started and educated on how to maintain their site/content on The Hub."

| THE HUB TEAM RESPONSIBILITIES | |
|---|---|
| **Role** | **Responsibilities** |
| **Executive Governance/Steering Committee** | • Provide overall governance and direction for go-forward strategy for associate portal<br>• Determine roadmap strategy for deployment of The Hub to additional audiences for a global deployment<br>• Prioritize activities and work streams<br>• Align portal vision and strategy with business drivers |
| **HR IT Department** | • Maintain the overall health, stability, usability, performance, maintainability, and scalability of the WebSphere infrastructure<br>• Provide platform and system administration<br>• Oversee project management and drive direction for portal and collaboration project activities<br>• Develop software and IA design to meet business requirements<br>• Ensure integrity of IA as new sites are created on The Hub<br>• Work hand in hand with GHRT and business partners to build high-quality, scalable, and reusable portal components<br>• Provide ongoing support activities (such as monthly releases and enhancements)<br>• Identify and recommend areas for future technical investment |
| **Global HR Technology (GHRT) Team** | • Interface with business partners to understand their needs and requirements<br>• Guide site managers on site strategy and design<br>• Manage and execute activities in support of overall portal and collaboration suite governance processes<br>• Work with content owners to rollout best practices/standards/governance as new groups are given a presence/site on The Hub<br>• Act as content champions<br>• Facilitate portal and collaboration training |

| | |
|---|---|
| | strategy<br>• Lead user acceptance testing and approval for all monthly portal releases<br>• Supplement site owners and content authors in authoring content for new sites |
| **Internal Communications** | This team is aligned within the HR function at Staples.<br>• Assist in building out and designing the site for the US Corporate Homepage<br>• Approve content posted on the site<br>• Define target audience for the site<br>• Remove out-of-date or irrelevant content<br>• Adhere to portal best practices, standards, and governance guidelines rolled out by GHRT |
| **Retail Communications** | This team is aligned within the Retail function at Staples.<br>• Assist in building out and designing the site for the US Retail Homepage and Retail LOB sites.<br>• Approve content posted on the site<br>• Define target audience for the site<br>• Remove out-of-date or irrelevant content<br>• Adhere to portal best practices, standards, and governance guidelines rolled out by GHRT |
| **Site Owners** | • Assist in building out and designing the site<br>• Approve content posted on the site<br>• Define target audience for the site<br>• Remove out-of-date or irrelevant content<br>• Adhere to portal best practices, standards, and governance guidelines rolled out by GHRT |
| **Content Owners/Authors** | • Write and review content posted on The Hub<br>• Expire out-of-date or irrelevant content |
| **Associates** | • Consume content posted on portal<br>• Engage with peers and coworkers through social collaboration tools |

## USERS

The Hub is currently rolled out to all US Staples associates. The site supports a wide array of user types, from corporate associates in roles such as finance, IT, and

marketing, to Retail store associates who work on registers, stock shelves, support the copy center, and repair computers. There are currently 55,000 users with logins to the portal.

Home office employees (corporate associates) include administrative support staff, a large IT group, finance, legal, senior executives, and employees of an in-house advertising agency. Distribution center employees include regional management, as well as truck drivers and warehouse workers.

## URL AND ACCESS

| ACCESS INFORMATION | |
|---|---|
| **Item** | **Status** |
| **URL** | • http://hub.staples.com |
| **Default Status** | • The intranet is set as users' default homepage. They can choose to change it by resetting the homepage in the browser's options settings. |
| **Remote Access** | • Users can access the site remotely if they connect into the Corporate LAN through Cisco VPN. The company does not currently offer an at-home extranet option, although that is in the company's plans for 2012 as it looks to expand the intranet to its international audience. |
| **Access from Shared Workstations** | • Store associates—that is, the employees who work on the floor in retail locations—access the site via browsers on their cash registers (point of sale machines). They often look up information during interactions with customers, including procedures and policies, as well as competitor information. Store managers, copy center associates, and the Retail technical support associates use shared PC workstations to access the intranet. |

## DESIGN PROCESS AND USABILITY WORK

### Using Research to Inform Decision-Making

The team relied heavily on research to inform its design activities. Team members conducted analysis of site usage, visited users in the workplace, and tested the designs.

"We looked at existing survey information and analysis of site statistics," says Kawamoto, "as well as at high-level strategy documentation to feed an interview process that included 29 stakeholders and contextual inquiry interviews."

As part of the research effort, the team traveled to several stores to experience the work environment and observe how the old portal was accessed. They also analyzed the content that each group was using.

The research was distilled into user profiles that then led to detailed requirements documentation and a prioritization exercise that involved business, technology, and design team members, identifying 374 functional and user requirements.

| | | Categorization | | | Audiences | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Owner | Content Name (Examples) | Content Format | Content Type | External (y/n) | Home Office | Other - (Field) | US Retail - GM's | US Retail - Store's | Ret Copy Pr |
| US Retail | Store Email | pdf | | n | | | | | |
| | | html | | | | | | | |
| US Retail - Tools | Coupon Printing Application | URL | Application | n | y | | y | y | |
| US Retail - Tools | Coupon Validation Tool | Excel | Application | n | y | | y | y | |
| US Retail - Tools | target.com | URL | Reference | y | y | | y | y | |
| US Retail - Tools | Highlights top issues or sales driving messages | URL | Social Media | n | y | | y | y | |
| US Retail - Tools | Highlights top issues or sales driving messages | URL | Announcement | | y | | y | y | |
| US Retail - Operations | Copy and Print QSAT Performance | URL | Application | y | y | | y | n | |
| US Retail - Operations | Regional Listing | PDF, Word, Excel | Contact Information | n | y | | y | y | |
| US Retail - Operations | Best Customer Contact Tracker | URL | Form | n | y | | y | | |
| US Retail - Operations | Remodel/Relocation Labor Reporting Form | Excel | Form | n | y | | y | | |
| US Retail - Operations | Rewards and Recognition Program | Folder | Form / Reference | n | y | | y | | |
| US Retail - Operations | Remodel/Relocation Labor Procedure | Word | Procedure | n | y | | y | | |
| US Retail - Operations | Spotlight to highlight top operations priorities | URL | Reference/Announcement | n | y | | y | | |
| US Retail - Operations | CSAT Medal Lookup Tool | Excel | Reference | n | y | | y | | |
| US Retail - Operations | How to Use the QSAT Dashboard | PDF | Reference | n | y | | y | | |
| US Retail - Operations | 3rd Party Merchandising Vendor Projects | Access | Reference | n | y | | y | | |
| US Retail - Operations | Customer Service is My Priority Poster | Folder | Sign / Reference | n | y | | y | | |
| US Retail - Operations | Step Up Arrows | Folder | Signs | n | y | | y | | |
| US Retail - Operations | Activecast from Lithium pulling from Operations Board | URL | Social Media | y | y | | y | | |
| US Retail - Operations | October 2009 DLP Enhancements: AHR and Forecast Grids | Slidecast (Media) | Training | n | y | | y | | |
| US Retail - Operations | An Overview of Actual Hours | PDF | Training | n | y | | y | | |
| US Retail - Operations | Mystery Shop | URL | Website | y | y | | y | | |
| US Retail - Operations | Signing | PDF | Website | n | y | | y | | |
| US Retail - Operations | Reset XEROX Printer | URL | Website | y | y | | y | | |
| | | | | | | | y | | |
| US Retail - Selling | In Store Inventory Lookup Tool | URL | Application | y | y | | y | | |
| US Retail - Selling | Services and Accessories Guides | Folder | Brochures | y | y | | y | | |
| US Retail - Selling | 4/18 AD Prep (Circular) | Word/PDF | Communication | y | y | | y | | |
| US Retail - Selling | EasyWay Selling Scoreboard | PDF | Form | y | y | | y | | |
| US Retail - Selling | Spotlight to highlight top selling priorities | URL | Reference/Announcement | y | y | | y | | |
| US Retail - Selling | Market Basket Reference Guide | PDF | Reference | y | y | | y | | |
| US Retail - Selling | Division 1 Circular & PC Version (Look up tool) | Excel | Reference | n | y | | y | | |
| US Retail - Selling | Easy Rebate Index | Word | Reference | n | y | | y | | |
| US Retail - Selling | Item of the Month 11x17 Sign - Case Water $3.99 | PDF | Sign | n | y | | y | | |
| US Retail - Selling | Activecast from Lithium pulling from Selling Board | URL | Social Media | n | y | | y | | |
| US Retail - Selling | EasyWay Signature Moments Narrated Guide | URL | Training | y | y | | y | | |
| US Retail - Selling | Role Play Archive | Folder | Training | n | y | | y | | |
| US Retail - EasyTech | PC Services and Accessories Guide | PDF | Form/Brochure | n | y | | y | | |
| US Retail - EasyTech | EasyTech Support - Who to Call | Word/PDF/Excel | Reference | n | y | | y | | |
| US Retail - EasyTech | EasyTech Supplies and Tools List | Word | Reference/FAQ | n | y | | y | | |
| US Retail - EasyTech | Data Recovery Flyer | PDF | Sign | n | y | | y | | |
| US Retail - EasyTech | Dell | Folder | Reference | n | y | | y | | |
| US Retail - EasyTech | Cisnet (workorder) | Folder | Form | n | y | | y | | |
| US Retail - EasyTech | Spotlight to highlight top easytech priorities | URL | Reference | y | y | | y | | |
| US Retail - EasyTech | EasyTech Web Submission | URL | Application | y | y | | y | | |
| US Retail - EasyTech | EasyTech Training | Link to L&D Page | Training Materials | n | y | | y | | |

Pictured: The team created an audience-content matrix to analyze which content was being used by each group.

The following user profiles are intended to reflect the needs of the users of Staples Next Generation Portal, but do not depict ALL of the users of the portal. The home office profiles depict many of the wants and requirements of home office associates that are not included in this set, but are all involved in content creation. Store Associate and Distribution Center information was collected by proxy.

| | Store Associate<br>Example:<br>Copy and Print Associate | Distribution Center<br>Examples:<br>Truck Driver | Home Office Worker<br>Example:<br>administrative assistant | Home Office Producer<br>Example:<br>Group Content Owner | Home Office Exec<br>Example:<br>Communications Director |
|---|---|---|---|---|---|
| General Information | ▪Hourly employee working in the copy and print department<br>▪Needs to know the most recent procedures and how to use equipment | ▪Hourly employee who delivers orders to customer homes/businesses<br>▪Needs to know the most recent procedures and how to use equipment | ▪Assistant to a senior executive<br>▪Focused on making sure the person she works for is aware of daily meeting schedule and important communications<br>▪Responsible for dept. page | Part of job is to make sure that the information on the group/department page is current and accurate | Develops and delivers consistent and current messaging to target audiences |
| System access | Shared computer | Computer in break room | PC on desktop in cubicle | PC on desktop in cubicle | PC in private office |
| Representative Tasks | Take orders and create products available in the copy and print department | Pick up boxes and deliver to customers | Schedule conference rooms and meetings, work on presentations | Post new content<br>Clean up obsolete content | Manages group content owners and other communications professionals in the creation of consistent and strategic messaging |
| Business Goals and Motivations for user | Employee understands the most current initiatives and procedures and facilitates the corporate goals and branding | Drivers know the latest policies and procedures, and understand Staples as a global company | Employee understands enough about the corporate branding objectives and strategic objectives to facilitate | Employee is able to keep the group/department page current and relevant | Corporate or group strategy is understood by target audience |
| Sample scenarios of ideal-state use | Told by manager that there is important information on the portal about new equipment | ▪Needs to download forms<br>▪Access policies and procedures<br>▪Find information about benefits | ▪Look up employee for meeting<br>▪Schedule a conference room for meeting<br>▪Looks up cafeteria menu<br>▪Check to make sure the group page is up-to-date | ▪Replace group-specific information on group homepage<br>▪Looks up someone they need to contact<br>▪Look up historical document | ▪Views relevant pages to ensure that the messaging is correct<br>▪Looks up someone they need to contact<br>▪Validates job opening in department |
| Primary Usage or activity Pattern | Beginning of shift of during lunchtime | End of shift | Intermittent use throughout the day | Checking/updating content for an average of at least 25% of day | Checks site a few times a day |
| Triggers for Action | Directive from manager | Wanted to make sure he understood the latest procedures | Manager asked for a meeting or to find some information | Group needs to be informed of new strategy or policy | Needs to approve content posting |
| Primary sources of Information | *Intranets*, printed documents shipped to store | Printouts | Intranets/Emails | Intranets/Emails | Emails from department |
| Tasks, Goals and Motivations | Provides products that have no mistakes while conveying the desired "customer service" messaging. Good reviews and feedback from manager and customers | Provides efficient service and is able to make all of his deliveries on his shifts | Facilitate manager's ability to meet professional and corporate goals | Wants to be able to efficiently manage content on the site | Wants the people she manages to be able to do their jobs efficiently, and to have the ability to target specific audiences easily |
| Needs | ▪Information that is easy to access and doesn't take too much time from tasks<br>▪The ability to share tips and tricks on how to better their job | A way to get information that is easy, and doesn't detract from his ability to make all of his assigned deliveries | ▪An easy navigation to all relevant information<br>▪The ability to see the organizational placement of the people she interacts with | ▪The ability to track and view expiration dates for content<br>▪The ability to easily replace content<br>▪Reporting on usage<br>▪Remote access for exempt employees | ▪The ability to specifically target audiences at different levels of granularity<br>▪The ability to see content as specific target audiences<br>▪The ability to post "critical" or time-sensitive information<br>▪Calendar |

Pictured: The user research was distilled into user profiles.

Team members gained valuable insights from the research they conducted. Armed with this information, they were better able make design decisions.

"During contextual inquiry at retail locations, we discovered that the retail technical support (EasyTech) employees were relying upon blogs to communicate with each other about specific customer requests and issues," says Kawamoto.

Community-based functionality received much better than expected results in usability testing. Most users were much more interested in "popular" links than anticipated. Even though the *Favorites* functionality was not depicted or explained prior to soliciting a reaction, most users rated its usefulness as very high.

The on-site observations helped the team better understand how associates operated in their interactions with customers.

"For retail users, during usability testing, we discovered the importance of providing one-click access to competitor sites," she says. "Being able to know what many customers know is considered a very important component of being able to service customers well. Also, being able to see coupon information easily is critical to providing good customer service."

Also important to users was the ability to seamlessly search across multiple internal domains, which factored into the team's decisions about search. The research also revealed environmental constraints that would affect the design.

“Additional considerations included the knowledge that some retail locations are sharing bandwidth with register data, so the design needed to accommodate more stress on the client-side than on the server-side,” says Kawamoto.

## Working with Agencies

Because the team wanted to make a big splash with the redesign, it was important to elicit all the help it needed to guarantee success.

TandemSeven was contracted to lead a complete user-centered design process. The TandemSeven team performed stakeholder interviews, contextual inquiry, user-profile development, requirements definition and prioritization, navigation modeling, wireframe design, visual design, and usability testing.

The collaboration between the two teams was seamless. “Staples collaborated with the TandemSeven team to ensure that the business objectives were met, design was vetted with technology, and institutional knowledge of users was incorporated into the design,” says Kawamoto.

## TIMELINE

| INTRANET TIMELINE | |
|---|---|
| **Milestone Date** | **Milestone Description** |
| **1999** | • First company intranet at Staples |
| **May 2009** | • RFP Process begins to assess new portal platforms |
| **January 2010** | • Staples chooses IBM WebSphere as its next-generation portal platform |
| **June 2010** | • Go-forward strategy and roadmap finalized and approved by Executive Governance Committee |
| **July 2010** | • Staples hires TandemSeven to lead intranet portal design work |
| **July 2010–April 2011** | • Requirements, design, build, and testing of The Hub R1.0, including standing up the new infrastructure, building out the portal team, and training all portal team associates on new WebSphere technology |
| **May 2011** | • The Hub pilot released to corporate and Quill associates |
| **June 2011** | • The Hub launched to 15,000 Corporate, Delivery, Field, and Quill associates in the US |
| **September 2011** | • The Hub pilot released to US Retail associates |
| **October 2011** | • The Hub deployment begins for 40,000 Retail associates (ongoing) |
| **November 2011** | • The Hub deployed to Canada |
| **Q1 2012** | • The Hub deployed to all International associates |

## CONTENT AND CONTENT CONTRIBUTORS

The Staples portal uses the Web Content Management (WCM) system that comes packaged with the IBM WebSphere portal. After a “hefty” evaluation of the WCM tool versus Documentum (another content management tool that Staples owns in-house), it was determined that WCM would simplify and streamline the content authoring process.

## Content Authoring

At Staples, most portal content is managed by two teams: Internal Communications and Retail Communications. The intranet also features retail business unit micro-sites that are authored and managed by content champions within each of the company's LOBs.

Content on the intranet homepage is developed, authored, and managed by the Internal Communications team. The team has five content authors and three workflows.

Content on the Retail homepage is developed, authored, and managed by the Retail Communications team, which has 76 authors and two workflows. This team is responsible for all content that resides on Retail's homepage as well as content that resides on the LOB sites, which includes: policies and procedures, promotions, signage, rebates, news, and so on.

Both groups have a set of custom workflows that have been built to accommodate their unique authoring and review-processing needs. There are five workflows in all; each contains one or more of the following actions:

- **Content authoring**
- **Content review** by a subject matter expert (SME)
- **Content review** by a content editor
- **Content approval** prior to publishing

In all, 90 associates have been trained and given access to author content on The Hub.

## Training

Any new group that requests a presence on the portal is provided training on how to author content within the portal site's authoring environment.

"We have several different types of authoring templates that the authors use in the WCM system (documents, announcements, news, links, etc.)," says Sheyner, "and we provide the content authors with template guidelines to assist them in learning the correct fields to be completed during the authoring process."

The team also has content mapping documentation that authors can use to help determine how to best categorize their content.

During the initial portal rollout to the company's Retail audience, the team used templated pages so that the content authors could arrange their content.

"We will look to continue to provide templated page options for other business areas as they migrate over to The Hub," she says. "In addition, we are starting to work toward an online tutorial for our content management team."

This will provide one-to-one training for all new content authors and also act as a point of reference for all content authors if they have specific questions about an area and want to read more about it.

For the initial rollout, the team conducted both individual and group training sessions based on the different levels of training required. Along with the training, they provided supporting documentation including authoring template guidelines, a content mapping overview, and wireframe documentation that provided a high-level

overview of how all of the content mappings relate back to the portlets and pages. They've also conducted additional individual training as needed.

"In the very near future, our team will be working with our training department to create an online tutorial for the content management team that will be used across the company, as well as some end-user tutorials for some of the connections elements of The Hub," says Sheyner.

## Maintaining Quality

In addition to establishing additional training opportunities for content authors, the team is working toward a more concrete governance structure to ensure that the quality of portal content is maintained over time.

"We haven't really finalized anything yet," says Sheyner. "We are going to rely heavily on the web content management system and the workflows."

Each group has a specific, required workflow that is based on the workflow checkpoints that the content goes through before it is published. During the workflow review process, the final approver reviews the content to ensure that it has the correct file properties and content categories, and that it's placed within the proper site area and assigned to the correct security groups for targeting the content.

The reviewer also confirms that the content has been assigned an expiration date. "To ensure that our the site does not become saturated with outdated information, all content will have an expiration date set before it's published," she says. "Our standard default setting will be to expire content at 13 months; however, content authors do have the option to have the content expire prior to the default setting."

The goal is to someday have a centralized content group in place to be responsible for all content governance activities.

"Our team is working toward implementing a process whereby each business area that has a centralized content group (for example, Store Communications with all Retail authors) conducts content author meetings on a bimonthly or quarterly basis to provide tips, review processes, and answer questions," says Sheyner. "The reporting data can be used when meeting with individual content author groups to provide feedback on search results, organization, and maintenance of content."

## Technology

The portal redesign effort was part of a larger "re-platform" effort, moving the Staples intranet from the BEA ALUI Aqualogic platform to the IBM WebSphere platform.

The transition to a portal platform on a new technology stack posed many new challenges for The Hub's rollout, including:

- **Alignment.** Designing, procuring, and installing a new infrastructure stack presented challenges in trying to align supported IBM middleware with Staples internal standards.
- **Training.** Because the portal technology was new to Staples, all teams and roles that support a part of the portal had to be trained on the new technology, including the development team, the administrative team, all power users, site owners, and content owners.

- **Content authoring.** The introduction of a formal CMS for authoring web content was a dramatic change for the organization; the legacy portal supported content authoring through a process in which users created documents and placed them on a share drive to be crawled into the portal. The new authoring environment gives content owners predefined authoring templates with required fields (such as title, description, keywords, category, and expiration date) and the content is pushed through a review process workflow for approval before being published. Although the new process is an improvement, it still took time to get buy in from across the organization.
- **Learning curve.** Because the technology was new to Staples, there was a steep learning curve that the HRIT and GHRT teams went through in trying to match up the business requirements to what existed in the out-of-the-box portal and the Lotus Connections. In many cases, Sheyner says the team over-committed on delivering functionality because "they lacked a thorough understanding of what the portal and Connections could do out of the box."

Although the technology transition was difficult, it was a step in the right direction and well worth the effort. "We chose the IBM WebSphere platform because we wanted to go with a technology stack that was highly integrated with little customization," says Sheyner. "Going with the IBM WebSphere Portal, Connections, and OmniFind stack gave us that ability. Because the technology could be integrated so easily, we were able to provide our associates with a seamless user experience for communications (Portal), collaboration and teaming (Connections), and a superior search experience (OmniFind)."

Having all three systems allowed the team to deliver on the project's guiding principles:

- **Heavy focus on personalization.** Keep the team focused on building the foundation/framework, including the core portal, search, content management, analytics, personalization, and application integration.
- **No take-aways.** There would be no take-away in functionality from what the company provided on the legacy portal. So, if it offered function A on the legacy portal, the team had to build out that functionality on The Hub.
- **Leverage out-of-the-box functionality/configuration where possible.** Implement business process changes in configuration versus customization to lower total cost of ownership. To accomplish this, the team was willing to configure—but not customize—the platform. In some cases, that meant changing business processes to align with what the platform could provide out of the box.
- **Enable a foundation for future deployments.** Will functionality benefit other business units? Will functionality accelerate moving all associates to one portal? Functionality examples include SIAM, Profiles, and so on.
- **Minimize impact of co-existence environment to users.** There will be a transition period as content is migrated. What's the impact to the users and how will that be mitigated?

- **Scalability.** It's not just about *what* functionality is provided but *how* it is built.
- **Wow factor.** Make the associates realize that they're "not in Kansas anymore!"
- **Engage associates.** The portal is not just about Chef Louie's menu, but rather is an integral part of their day.

| TECHNOLOGY | |
|---|---|
| **Category** | **Technology Used** |
| **Web Server Hardware and O/S** | • WebSphere Portal 6.1.5 running on four IBMHTTP Servers (version 7.0.0.13)<br>• Lotus Connections 2.5 running on four IBMHTTP Servers (version 7.0.0.19)<br>• **OS:** GNU/Linux; Red Hat Enterprise Linux Server release 5.6<br>• **Processor:** x86_64<br>• DB2 9.5 on AIX Power 7 OS for the database tier |
| **Bug Tracking/Quality Assurance** | • **Bug/defect tracking:** StarTeam for bug/defect tracking and enhancement requests for The Hub<br>• Three development and two QA environments to unit test, smoke test, and user acceptance test all monthly release changes before promoting changes to production.<br>• **Performance:** Prior to the initial launch to Corporate associates, the team conducted a full system performance test using Silk Performer to set a baseline standard for portal performance. The team is currently building out a dedicated performance test environment. |
| **Design Tools** | • Visio<br>• Photoshop<br>• PowerPoint Templates |
| **Site Building Tools** | • IBM Rapid Application Development tool for building themes and portlets<br>• IBM Portlet Factory<br>• Firefox Firebug<br>• Fiddler Web Debugger<br>• WinSCP for secure file movement with Linux<br>• StarTeam |
| **Content Management Tools** | • IBM WCM 6.1.5<br>• Documents on Fileshare |

| | |
|---|---|
| **Search** | • IBM Omnifind 9.1 |
| **Other Functions** | • **Brightcove:** integration of streaming video onto portal<br>• **Poll Daddy:** authoring of polls and surveys<br>• **Omniture:** portal analytics |

## SEARCH

The search tool behind the Staples intranet is OmniFind. It is also the current search engine used within the Staples ecommerce platform and offers tight integration with the company's technology platform and portal. OmniFind was chosen because Staples wanted a fully integrated suite of tools and wanted to leverage knowledge synergies it already owned internally.

This choice has proven to be a potent solution for the company's portal search. "IBM OmniFind 9.1 is a powerful enterprise search engine," says Sheyner, "capable of performing Google like searches given the right search tuning parameters."

For The Hub's initial launch, the portal was rolled out with search capabilities against four individual collections:

- **The Hub WCM content.** These content stores are located in the portal's WCM system.
- **Staples@Work.** Team members used the tool to craw content from the file share used to author and publish content onto the legacy portal platform called Staples@Work. They did this so that, from a usability perspective, users would not have to know which portal to search. For The Hub or Staples@Work, all searches are performed against The Hub global search function.
- **The Hub|Connections—Profiles.** Associate Profiles are searchable from the global search function.
- **The Hub|Connections.** This pulls in the remaining Connections content that is currently turned on. Currently, that consists of blogs and bookmarks, but in the future will also include communities, wikis, files, and activities.

### Refining Search Results

The challenges of having the old platform co-exist with the new one, as Staples has chosen to do for the next three years, presents many challenges and user-experience concerns. OmniFind has actually helped the Staples team meet many of those challenges.

"Given the fact that we will be living in a co-existent portal environment for up to three years (until all content from Staples@Work is migrated over to The Hub) and because we want Lotus Connections to look like a part of the portal (fully integrated in look and feel)," says Sheyner, "we wanted to reduce the usability issues by providing our associates with a single access point for finding the content they need, no matter the source.

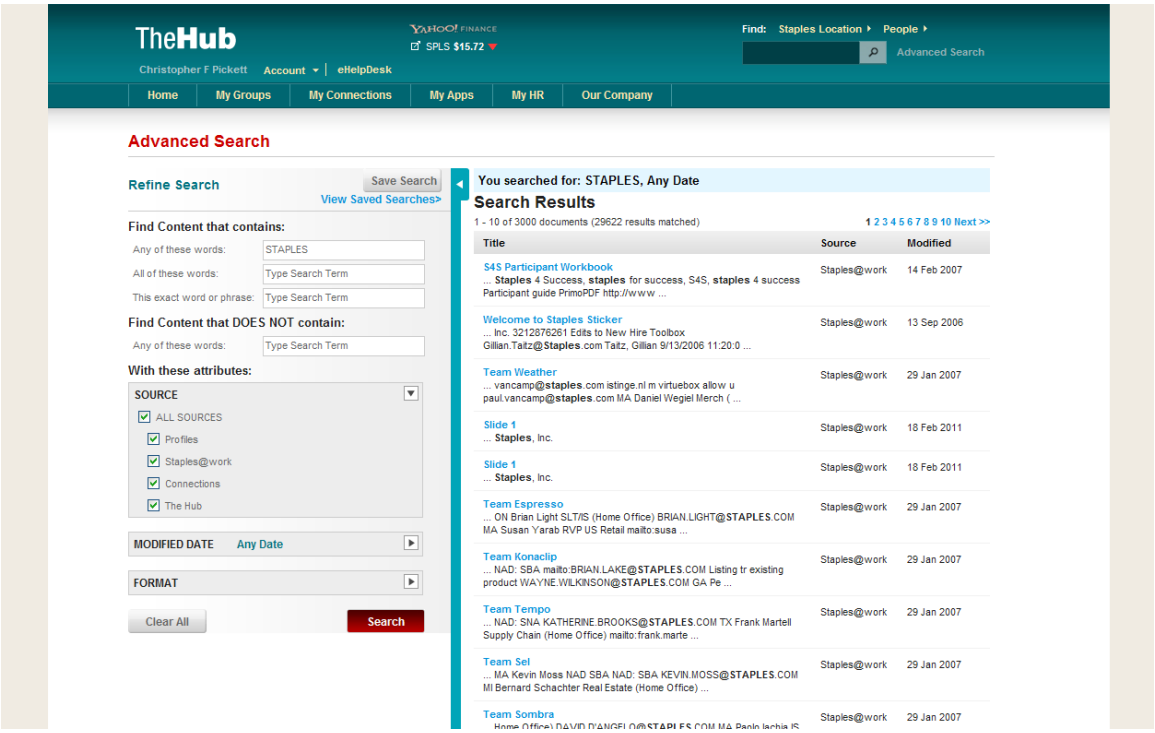
"OmniFind has allowed us to achieve this goal with a single search engine and a single user interface," she says, adding that the portal governance on search tuning ensures:

- Search delivers the most relevant results for the user's query
- Company and business specific synonyms, acronyms, and abbreviations are searched for in the correct context

The team has taken concrete steps to ensure that those things happen. Within OmniFind, the team fine-tuned the search engine using the following tuning utilities:

- **Boost word dictionary.** Automatic term boosting for words specified in the user-defined Boost words dictionary. The team mirrored the boosting applied in the legacy portal search engine.
- **Synonyms dictionary.** This utility returns similar words. Staples has an *Acronym and Staples Speak* dictionary that it uses to populate the OmniFind synonym dictionary. This ensures that users will get expected results while searching for common company and business specific synonyms, acronyms, and abbreviations.
- **Quick Links.** Quick Links are like best bets. They allow users to enter a specific URL and for a given number of search terms it returns the link as a top result for that set of search terms. These results are based on Omniture's analytics of fruitless searches, top terms, and keywords that are searched. The team then adds new or updated Quick Links each month. At The Hub's initial deployment to Corporate, the team mirrored all best bets that existed in the legacy portal as Quick Links on The Hub.
- **Content keywords such as title, description, and category (native WCM content).** For each piece of content, the authoring templates require at least one keyword to enter the content for publishing. Each piece of content is also associated with a category that helps the portal filter which content should be placed on which page and portlet. There are also the usual suspects (such as content description and title) that are entered with each new piece of published content. OmniFind collects all of this metadata, along with many other content attributes, then indexes the metadata and uses that index to return relevant search results based on the search term. Part of the governance process is to ensure that site owners and content authors understand the importance of entering appropriate keywords, titles, and descriptions.
- **The Hub | Connections—Tagging:** Tags that are applied to *Profiles*, *Bookmarks*, and *Blogs* are pulled into OmniFind and indexed for its *Profiles* and *Connections* collections. Along with many other metadata attributes that are pulled in from OmniFind, this allows the Global Search capability to search user-submitted content in Connections through the portal search engine.
- **Relevancy ranking:** The team also takes advantage of the many inherent attributes of OmniFind's relevancy ranking algorithm, including:
    - URI pattern matching

- Static ranking
- Text-based scoring
- Proximity search




Pictured: Advanced search lets users search the multiple intranet domains via one interface. Users can select which area to search and save their common searches for later retrieval. During usability testing, users rated the usefulness of the search results.

## RESULTS AND ROI

Helping employees get things done more efficiently is often a key outcome of successful intranets. And that one factor alone can be a big win for just about any company.

“The big wins are easier online transactions and search functionality, allowing associates to get things done more efficiently and find what they need more easily,” says Pam Cayem, Director of Internal Communications, “Equally important is that The Hub has allowed us to move from a traditional, top-down communications model to one that supports interactive dialogue; giving associates a forum to be heard and make a difference.”

With the ability to showcase and profile Staples’ associates and leaders through compelling videos, blogs, professional networking, and other social media, The Hub lets the company communicate Staples’ business strategy, objectives, and values in a powerful new way that is also very personal.

“We see The Hub as a key driver of associate engagement and understanding of not only our business strategy,” she says, “but our company’s culture and long-term vision. If it’s important, associates can find it on The Hub—and increasingly, they

are. Outside of their managers, over time we expect The Hub to be associates' number one source of information about all things Staples."

The redesign has offered Staples many other important gains, including:

- **Enhanced communication:** The new portal provides a communications platform that easily supports personalized and dynamic information delivery that is used by associates and company leaders alike. Today, many of the company's most senior leaders blog regularly and the team is launching a podcast and new executive-leadership video series. All of this two-way communication would not have been possible without the new platform. These new channels are gaining traction among associates, generating traffic, and often exceeding the company's expectations.
- **Collaboration facilitation:** The redesigned intranet provides innovative collaboration tools that promote teamwork and interactive communications, and reduce costs associated with travel, telecom, and other operational expenses.
- **Progress toward globalization:** The new intranet supports the development of an international company and fosters a shared Staples culture globally.
- **Maximized associate potential:** The new tools and communication channels enable the company's most valuable corporate asset—its associates—to be more productive and efficient.
- **Inspired selling:** The intranet promotes and enables partnership across business channels to drive sales.

## Measuring Success

The Staples team attempted to quantify ROI as part of its initial vision and strategy work. To this end, it articulated a multi-year roadmap that includes benefit dollars that were calculated by the following measures:

- **Increased productivity.** Increased associate productivity and decision making by providing access to more relevant information and offering a single access point for collaborative services, content, application, and processes.
- **Reduced cost.** Reduced cost of HR transactions due to web-enabled business processes with associate-specific HR information, performance management, learning tools, and more.
- **Improved productivity.** Improved associate productivity as a result of advanced collaboration capabilities.

The strategy and long-term vision for The Hub was presented to C-level executives for their buy-in.

The Staples team is in the midst of its global rollout (to 26 countries and approximately 90,000 associates). The US rollout completed in October 2011, and Canada completed in November 2011. The team plans to rollout to the rest of the international business by Q1 2012. Currently, Staples supports more than six different locally hosted intranet sites. The Hub's rollout alone is significant because it represents the first time that all international associates will share a single intranet—

giving the company the ability to unify a dispersed and diverse workforce in 26 countries.

As the team continued its roll out, it offered a snapshot of some of the metrics it had gathered thus far:

- Approximately 2,100 profile pictures provided
- Nearly 100 published blogs with more than 200 blog entries from 83 bloggers (at the end of 2011)
- More than 550 comments posted in response to blogs
- Approximately 1,100 unique bookmarks added by 780 users (at the end of 2011)
- Over 4 million total page hits since initial deployment
- An average of more than 80,000 page views from approximately 8,000 unique visitors each day
- The most visited sites on the portal are:
    - *Homepage*
    - *People Finder*
    - *Profiles*
    - *Search Results*

## LESSONS LEARNED

Members of the Staples team share some of the lessons learned from The Hub project:

- **Understand your platform.** "It's always a good idea to have a deep understanding of the capabilities of the native platform so you can propose accommodating design concepts. Because of a high-demand on a 'global' calendar function that displays company-wide, regional, and store events, we designed several display options that were ultimately going to be highly customized solutions, and not feasible within the timeframe. The ultimate solution was simpler, and simpler to implement, using 'out of the box' functionality." (Kawamoto)
- **Communicate, communicate, communicate.** "The replatform/redesign effort involved over 10 cross-functional teams within Staples, not counting the number of vendor teams we engaged to make this project successful. Because there are so many teams working on many different activities and tracks to make this project successful, communication is key across functional teams and across different levels within the organizational hierarchy." (Sheyner)

- **Document everything.** “Clearly document requirements to reduce the risk of scope-creep later in the project. With a redesign project, it’s easy to get caught up in over-promising what can be delivered because you want to fix all of the wrongs and issues from the legacy platform in one swoop. What made us successful was documenting a set of Guiding Principles that we compared each requirement against to [decide whether] the requirement met our criteria for being in scope. We wanted to take on manageable chunks of work versus boiling the ocean.” (Sheyner)
- **Set expectations with care.** “Ensure that you set reasonable expectations for the business. Getting buy in from our business partners on our Guiding Principles helped us to socialize and partner for a successful outcome without over-committing on what the project team could deliver.” (Sheyner)
- **Pick the right partners.** “Finding the right vendor partner to collaborate with can make or break your success. It was critical that we found solution partners who understood the capabilities of the WebSphere Portal Platform and could help us design and build a website based on our guiding principles and the underlying technology, while successfully meet our business goals and objectives. Working with partners such as TandemSeven, IBM, Streebo, and Asponte were critical to our success.” (Sheyner)
- **Test early and often.** “Test the designs as early as possible. There is greater efficiency in the design-approval process if you prove the usability of functionality up front. There is greater efficiency in the design process when stakeholders can focus on information hierarchy and branding versus abstract opinions on what is ‘usable.’ We would definitely propose guerilla usability testing for some of the more dynamic interaction designs earlier and more often. (Kawamoto)

# The Foschini Group

**Using the intranet:** The Foschini Group (TFG) is one of the foremost independent chain store groups in South Africa. TFG has 17 retail brands that trade in clothing, jewellery, accessories, sporting and outdoor apparel and equipment, cellular goods and services, and housewares to the broad middle- and upper-income groups throughout 2,000+ stores predominantly in Southern Africa. The majority of merchandise sold in the company's stores is sold under the company's own brand names. In addition to retail sales, revenue is generated from interest received, as well as through various customer value-added products that are primarily sold through TFG's call center. Merchandise is sourced both locally and internationally. In addition, the company has an in-house design and manufacturing facility which co-ordinates production through its own factories as well as through various independent cut, make, and trim factories.

**Headquarters:** Cape Town, South Africa

**Number of employees the intranet supports:** 6,000

**Company locations:** The company operates predominately in Southern African countries including: South Africa, Botswana, Namibia, Ghana and Nigeria.

**Annual sales:** ZAR 16.3 billion (year ended March 31, 2014)

**Design team:** The site was designed with collaboration between in-house resources and its agency partner, Intervate.

**In-house:** Kathryn Sakalis (Business Sponsor); Mo Kola (IT Sponsor); Retha Carter; Cindy Matungulu; Marius Botha; Craig Hall; Jean Snyman

**Intervate:** Roxanne Pearce; Christo Greeff; Kevin Pederson; Warren Soper; Marc Fletcher

## SUMMARY

With 17 retail brands, ranging from clothing to outdoor equipment to cellular services, The Foschini Group (TFG) needed a unified intranet to serve employees in the head office. A solution, called inTouch, had already been created for the retail stores, aimed at improving communication and knowledge management. The next challenge was doing the same for the head office. With the help of Intervate, an enterprise information management provider well versed in building SharePoint solutions, the company created inSite to move their intranet from a static site filled with Excel files to an interactive and dynamic experience that encourages collaboration and productivity.

Armed with results from surveys and discovery workshops, and inspired by past winners of the Nielsen Norman Group design annual competitions, the team set out to change the way employees in the head office communicate and collaborate. In just nine months and with a fixed budget, the team built a new solution to support employees in the head office, regional office, and distribution center, as well as field management — all knowledge workers requiring fast and easy access to systems and information.

The team used an Agile methodology to incorporate continuous feedback into the design. They started with mockups of individual elements then incorporated those into complete pages in order to take a better look at the big picture and understand how elements influenced one another across the user experience. Daily morning

stand-ups allowed each team member to discuss the previous day's work, as well as plans for the day ahead. This methodology was helpful for catching issues early and keeping everyone on the team informed.

InSite incorporates elements of TFG's corporate identity like brand, color, and fonts in a way that puts a fresh design on the intranet. The team brought a "wow" factor to the intranet with a bold, modern style that utilizes flat design.

The homepage features a news carousel that shows three stories by default: one main story and two secondary stories. Employees can click or scroll to the next set of stories. Subtle icons in the upper right corner of each item indicate what type of item it is, such as an announcement, news article, CEO message, or advertorial. Hovering over a news item results in the image shrinking slightly as an overlay with a heading and summary appears, providing more information about the news item.

The homepage is focused on current news and information, is constantly updated, and includes practical information too, such as what's popular on the canteen menu. The appearance of even this simple information on the site is a vast improvement. Events and birthdays fill out the front page. The fourth section on the lower half of the page allows internal brands to display products and promotions, making staff aware of the latest deals across the company's 17 brands.

The circles along the bottom of the page are quick links to TFG's other key systems, making access to them easy.

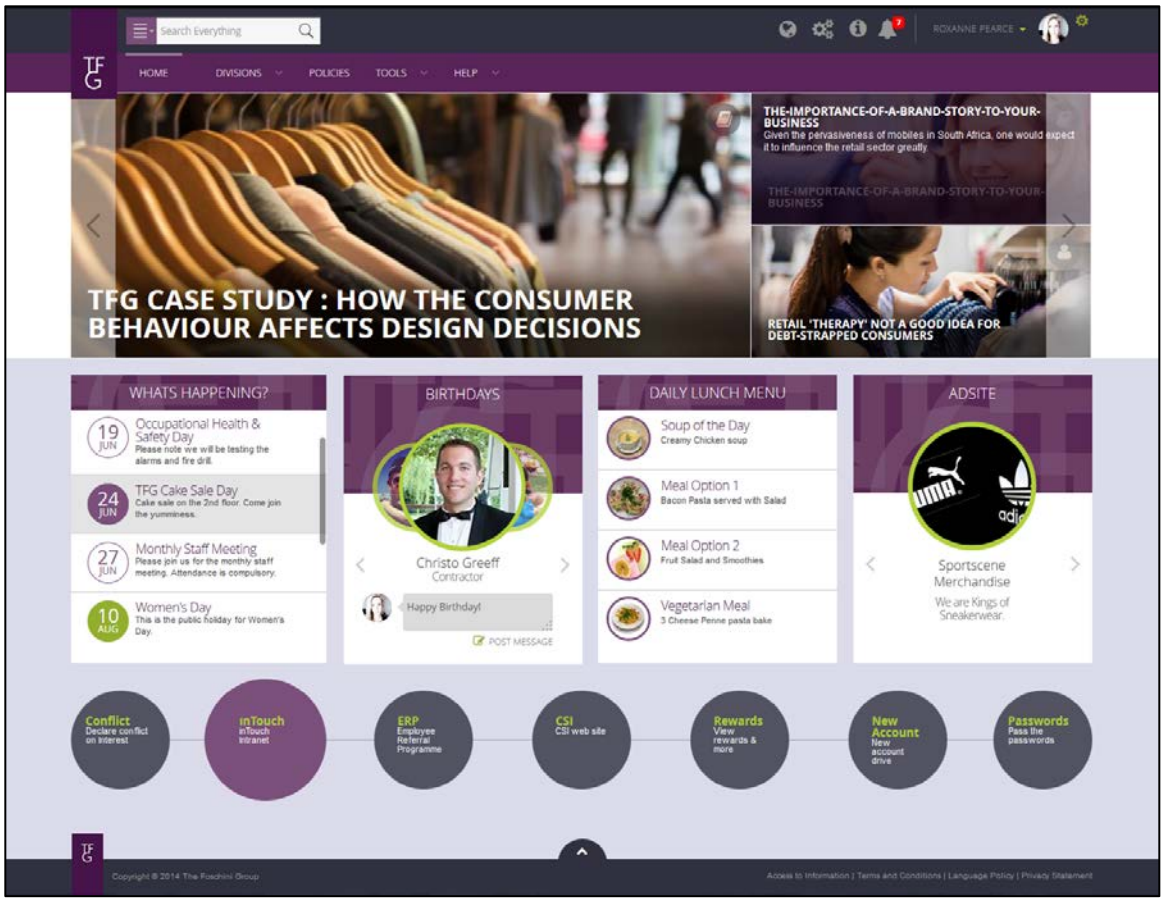



**Image 1. TFG Intranet: Homepage.** A clean and colorful homepage design on the TFG intranet brings timely information to the front — offering news, events, celebrations, a lunch menu, and retail promotions. *112_TFG_01_HomePage_live.png*

The toolbar items appearing next to an employee's name in the top right of the page remains persistent throughout the site. The icon-based tool links provide quick access to important features and information, such as weather, applications and reports, and site notifications. The globe icon link leads to TFG's public online shopping website (http://www.tfg.co.za/home) and the gears lead to a customizable list of applications and reports.

The "i" icon, which has become standard for meaning "information," gives users quick access to daily information from other sites: weather forecast, share price, date and time, and so forth. This information is location-specific.

If an employee is mentioned in a posting, a red badge indicator appears over the bell icon. The indicator updates every 30 seconds, giving it a real-time effect. When a user clicks on the notification, a pop-up menu appears showing the last 10 notifications. When hovering over the list, a scrollbar appears, if needed, to allow users to navigate to additional content. The newest notification is highlighted in gray, and after viewing, the red notification indicator disappears after a few seconds.

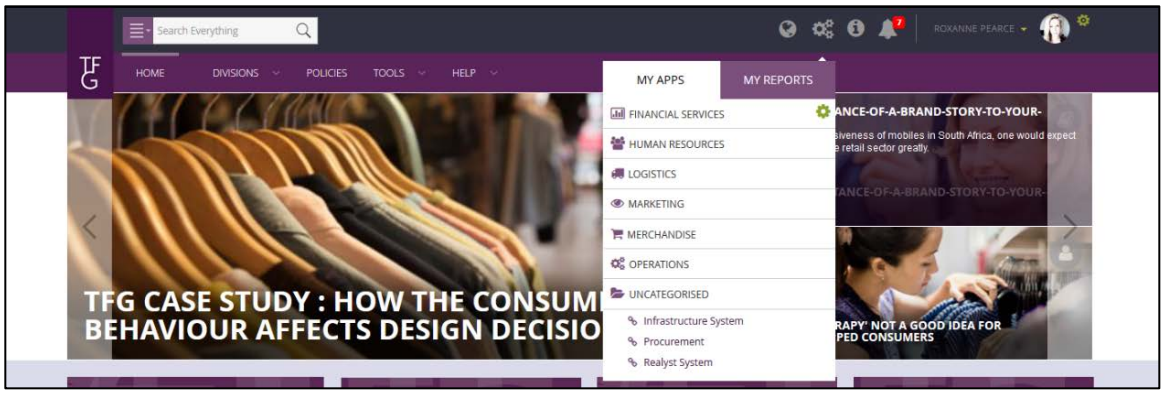



**Image 2. TFG Intranet: Apps and Reports.** The gear icon gives users access to their applications and reports, organized in different categories under the *My Apps* and *My Reports* tabs, respectively. Employees can expand and collapse categories to see what items are in them and find what they need. *113_TFG_02a_ApplicationsReports_tabs.png* and *113_TFG_02b_ApplicationsReports_tabs_CROPPED.png*

**Image 3. TFG Intranet: *Daily Information*.** The *Daily Information* component (having the "i" icon) displays the weather, company share price, day, date, and, time in context of a user's location. *114_TFG_03a_dailyInfo.png* and *114_TFG_03b_DailyInfo_cropped.png*

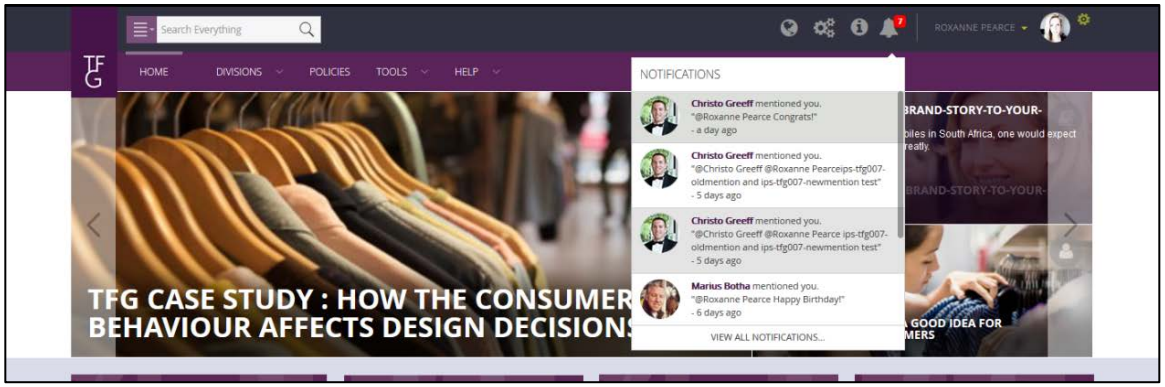



**Image 4. TFG Intranet: *Notifications*.** The bell icon gives users quick access to their notifications. A red badge appears on the bell when new notifications are available. *115_TFG_04a_Notifications_live.png* and *115_TFG_04b_Notifications_live_CROPPED.png*

One of the goals of the new TFG intranet was to bring social and personal content to the front. The new TFG intranet introduces social tools for the first time, so the team wanted to include subtle ways to encourage casual interactions. The inclusion of birthday and anniversary information, for example, was designed to be a simple encouragement to connect employees. This information is intended to lower the barriers that keep employees from meeting one another, making it easier for employees to reach out to someone they don't know, to communicate when they otherwise might not have done so. Such "weak connections" can lead to collaboration opportunities down the road, creating introductions that might not otherwise have been made.

Anniversaries are celebrated in five-year increments, while birthdays are, naturally, an annual celebration. Three employees are highlighted at a time and the information rotates. On hover, the carousel pauses and allows employees to post congratulatory messages, which appear on the recipient's social feed and in their notification toolbar. If anyone in the company prefers not to share his birthday or anniversary, there is an option to turn off these notifications.

While birthdays are listed on the intranet homepage, anniversaries appear within the *My Site* area. This is the standard employee profile area of the site, providing details about the employee as well as access to the employee's newsfeed, contacts, and inbox. The information that appears when a user clicks the "i" icon in the toolbar also appears in the right column of the page along with news, event information, and the daily lunch menu.

The design team knew the site would be stronger if employees added information to their employee profiles. To encourage employees to do this, the team added an element of gamification into the process. By simply adding an indication of how complete a profile was, the team gently nudged employees to add more information to their skills, past projects, and *About Me* sections. In addition, adding this information results in stronger personalization, for example, showing the proper canteen menu and showing the employee's birthday or anniversary. In addition to providing personalization this data also assists the SharePoint people search to surface the correct employee profiles. A color progress bar indicates the employee's status, and users can hover over the progress bar to see what information is missing.

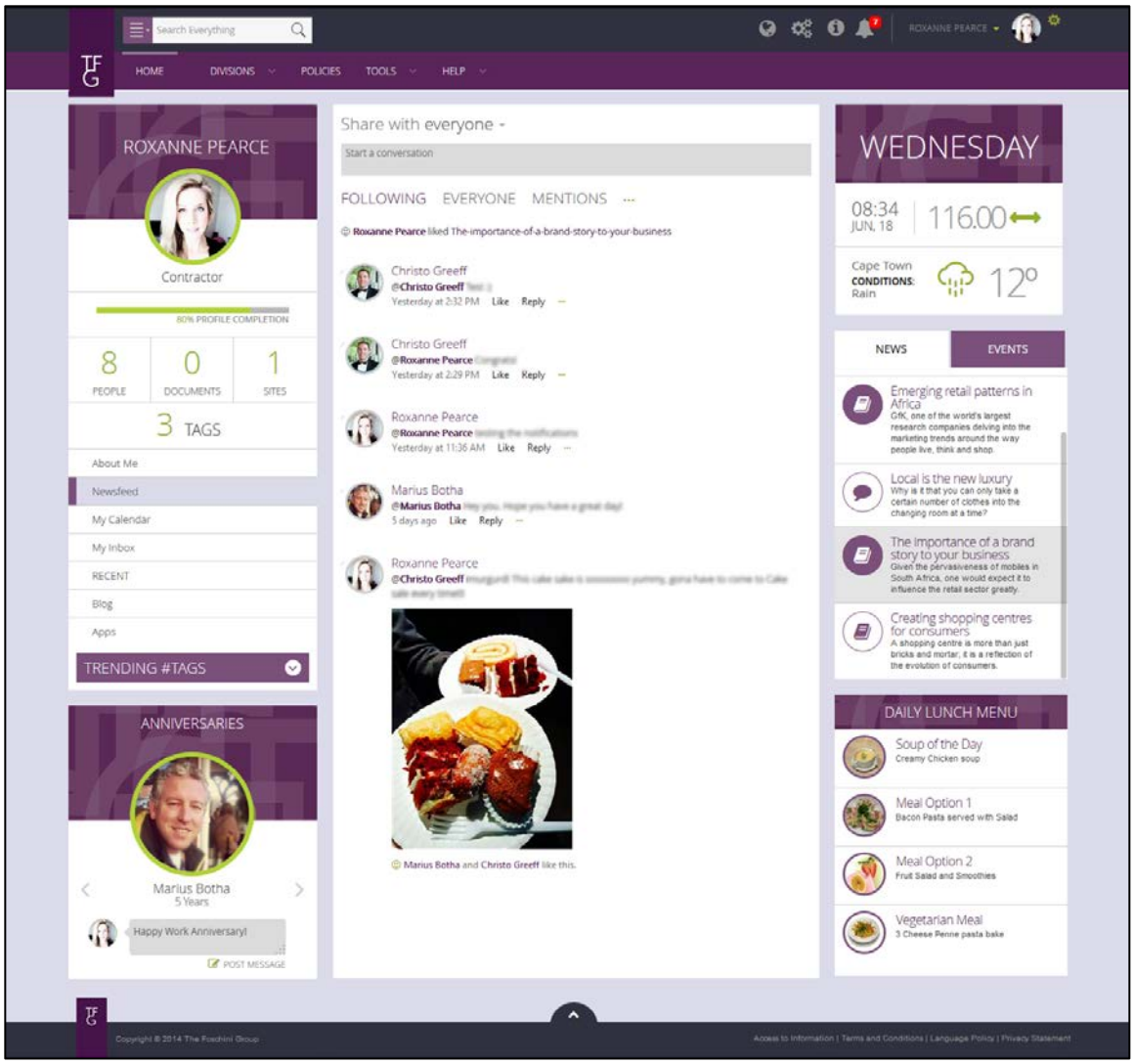



**Image 5. TFG Intranet: Employee Profiles.** A progress bar, appearing below the employee's photograph, indicates how complete the employee's profile is. This is a subtle gamification tactic intended to encourage employees to add more information to their profiles. More robust profiles help employees learn about one another and help them find the right connections within the organization. *116_TFG_05_MySitePage_live.png*

The TFG intranet uses responsive design to serve mobile users as well. The primary content available on mobile devices is information of immediate use — news, menus, birthdays, and anniversaries — with emphasis on content consumption rather than creation. Search is essential as well, and a search icon gives users quick access to the search functionality.

The intranet front-end is built on a simple grid framework, slightly modified, that aids the responsive display on mobile devices. For example, in mobile screens, the wide-screen navigation is replaced with the standard "hamburger" icon button to pull in the navigation when needed, and a *Back to top* link appears as users scroll down the

page. The majority of the homepage is mobile-friendly, offering timely information that was easy to display in mobile devices.

The news carousel is replicated in the mobile design, giving quick access to three news stories. Other homepage content the carousel — events, anniversaries, and promotions. Large touch targets allow easy access to information.

The *My Site* area was the most complex responsive challenge because most of the standard SharePoint page elements needed to be reworked. This section includes personal information about employees, company information, weather reports, notifications and discussions. The team relied on JavaScript to push the responsive boundaries.

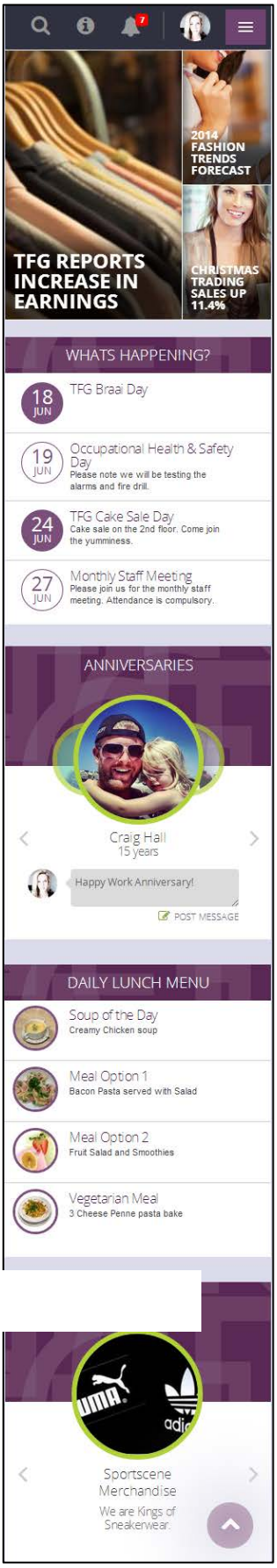



**Image 6. TFG Intranet: Mobile View.** The mobile view of the TFG intranet focuses on content that is timely and allows for quick consumption of information. *117_TFG_06_MobileView_live.png*

The TFG intranet's clear and consistent design helps employees find what they need and connect with one another.

## BACKGROUND

The idea for the company's current intranet began a few years ago when Group leaders realized that communication between the company's head office and stores needed drastic improvement. The stores also found it extremely hard to find current and correct information, thus impacting the company's ability to provide good customer service. In 2012, in conjunction with Intervate, the company designed a store-specific solution called inTouch to close this gap between the head office and the stores. The inTouch solution provided stores with new communication and knowledge management capabilities, and was well received by store employees.

The old head-office intranet (not replaced by inTouch) was static, unmanaged, and unowned. It provided little value outside of being a glorified index page. Inspired by the success of inTouch for stores, the company wanted a new and modern intranet for the corporate head office that would promote employee engagement, productivity, and collaboration. That result was inSite, launched in 2014.

The goal for the TFG intranet as: "We want everyone in the business to feel connected and to be as one."

The intranet team wanted a site that could: increase productivity (by making it easier to access and find information), facilitate internal communication, grow a knowledge management culture, enhance the multimedia offering, encourage employee engagement, and provide a many-to-many collaboration experience.

## INTRANET TEAM

Members of the TFG intranet team (back row, left to right): Marc Fletcher (Intervate), Craig Hall (TFG), Kevin Pederson (Intervate), Jean Snyman (TFG), Christo Greeff (Intervate), Marius Botha (TFG); (seated, left to right) Retha Carter (TFG), Kathryn Sakalis (TFG), and Roxanne Pearce (Intervate). Not present: Warren Soper (Intervate), Cindy Matungulu (TFG), and Mo Kola (TFG).

## GOVERNANCE

Business ownership of the TFG intranet resides with the Group CRM department and the Group Marketing department. Technical ownership resides with the Group IT department (TFG Infotec). This placement has been successful because the department owners are eager to make the new intranet work. “The business owners are excited and fully supportive of the current solution and strategy,” says Botha. “I believe they were frustrated for a long time since the old intranet really didn’t provide them with any capability to drive their intranet strategy.”

| INTRANET TEAM RESPONSIBILITIES | |
|---|---|
| **Role** | **Responsibilities** |
| **Group CRM and Marketing** | • Drive internal communication strategy<br>• Provide governance and content management support for content authors<br>• Maintain editorial control of Group communication and content |
| **Divisional Management** | • Oversee division information and content management |
| **Content Authors** (specific to departments and/or teams) | • Manage content authoring and approvals of content for specific sections of the intranet |
| **Enterprise Knowledge Management** (a department within TFG Infotec) | • Manage site creation, design, and development<br>• Oversee technical strategy and information architecture of the intranet |
| **Infrastructure** (a department within TFG Infotec) | • Manage the physical infrastructure for the intranet |
| **Service Management Center** | • Provide first and second line support for intranet users |

**Figure 1. TFG Intranet Team Responsibilities**

## USERS

Most TFG employees are knowledge workers requiring fast and easy access to systems and information. They fall into several employee groups, including head-office, regional offices, field management, and distribution center.

- **Head office roles:** operations, finance, merchandise, and human resources
- **Field management:** area managers, regional managers, and divisional managers

## URL AND ACCESS

| ACCESS INFORMATION | |
|---|---|
| **Item** | **Status** |
| **URL** | • insite.tfg.co.za |
| **Default Status** | • The site is set as each user's homepage. |
| **Remote Access** | • Users can access the site remotely using RAP (Remote Access Protocol) from their personal workstations. |

**Figure 2. TFG URL and Access Information**

## DESIGN PROCESS AND USABILITY WORK

### Design Approach

The design approach for the new intranet was to introduce a “wow” factor, says Roxanne Pearce, a UX designer at Intervate. “The style was bold, sleek, and incorporated innovative elements moving away from the traditional intranet look and forcing the trending social and personal aspect to the forefront,” she says.

The intranet was designed for personalization and a strong social experience. “The design reflected the TFG corporate identity to ensure that employees would still be familiar with the experience, through brand, color, fonts, and stylistic elements with which they were already accustomed,” says Pearce.

Instead of a page-by-page design, the team used an Agile approach to design potential functional elements. This made the design more flexible and gave the design more creative freedom to grow.

After a few functional elements such as the rollup of news and announcements were designed, they were presented to the TFG marketing team. This step provided the team with valuable interim feedback. Once two separate homepage options and two separate content page options were completed, they were presented to select stakeholders for review through an online survey. Based on the survey feedback, the design and development continued with the chosen design direction. These types of feedback loops created an open channel of communication with key stakeholders throughout the project and were a key factor in the success of the design.

An equally open channel of communication existed between the TFG team and the company’s agency partner, Intervate. Together they formed a joint project team that merged the collective skills and knowledge of each company. They worked together and engaged each other in constant feedback through the daily stand-ups and brainstorming sessions. This unified approach led to a successive line of improvements as the project progressed.

“Since we have a small internal team, we need to leverage the knowledge of our partners,” says Botha. “Intervate is our SharePoint partner and we have a strong relationship with them. We involved Intervate right from the start. They have been on this journey with us all the way. Although the engagement with them around this project is now completed, we still know they are just a phone call away.”

Intervate provided a Scrum Master, a UX designer, and two technology consultants to support the out-of-box SharePoint components and develop new (custom) ones. A senior developer contributed from TFG’s side, as well the product owner who guided the project based on the agreed business requirements. This group formed a unified front and provided a foundation for the project to succeed.

“What worked really well was this continuous and instant feedback from the TFG team,” says Pearce. “The Intervate team worked onsite alongside the TFG team, allowing for effective brainstorming sessions as changes needed to be made.”

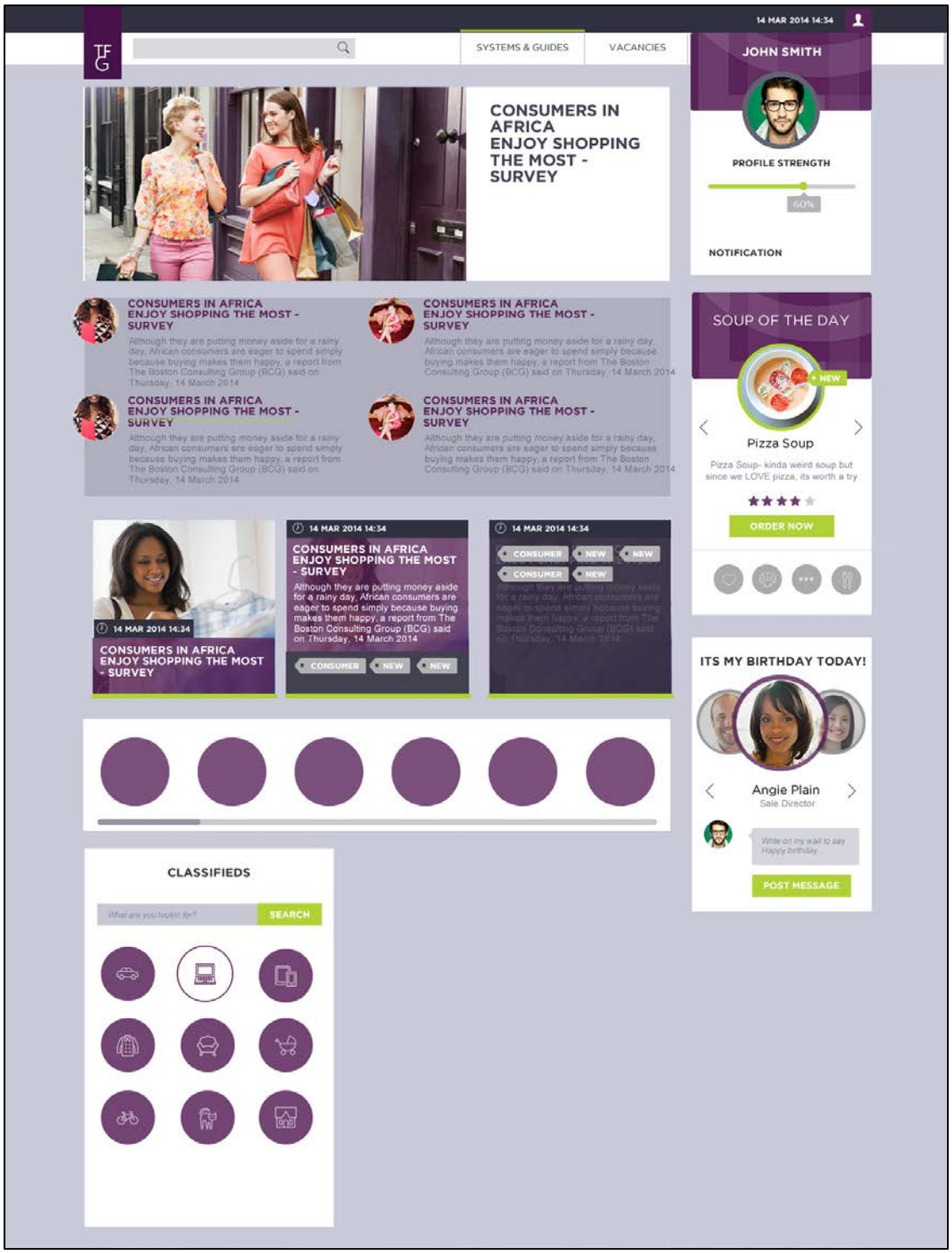



**Image 7. TFG Intranet: Page Design Mockup.** The TFG intranet design team used an Agile approach, allowing them to design each component individually rather than design a full homepage. After a few elements were ready, they were combined in page mockups to visualize what a homepage would look like, thereby giving the team a sense of the bigger picture. *118_TFG_07_mockup_version1.png*

## TIMELINE

| PROJECT MILESTONES | |
|---|---|
| **Milestone Date** | **Milestone Description** |
| **1996** | • First company intranet: info.foschini.co.za |
| **January–October 2003** | • Redesigned intranet to be driven by Microsoft .NET |
| **October 2011** | • Color change made to represent new Group brand |
| **January–June 2014** | • New intranet, inSite, developed |
| **September 2014** | • inSite launched |

**Figure 3. TFG Project Milestones**

## CONTENT AND CONTENT CONTRIBUTORS

SharePoint 2013 is used as the intranet's CMS. Using this technology made sense given the company's exclusive use of Microsoft technologies and its successful implementation of SharePoint in other areas of the business, including the store portal, inTouch, in 2012.

Approximately 100 people from across the organization were designated to provide content for the site. That group consists of both contributors and approvers. The level of approval required before publication, however, may vary depending on the process and requirements needed for the specific department and content type.

Content providers are supported through online training material, videos, FAQs, and user forums. Employees can also log an IT support call for assistance at any time. The team also provides training workshops for content owners and approvers through the company's Learning and Change department, and they run a quarterly user forum where they discuss content tips and tricks, challenges, and future enhancements.

The company goes the distance to make sure the intranet content is not only created well in the first place, but is maintained with a consistent level of quality over time. "We employ editorial experts, on a yearly basis, to review the content and supply us with best practices and guidelines to assist content owners with their content," says Craig Hall, Senior Technical Specialist.

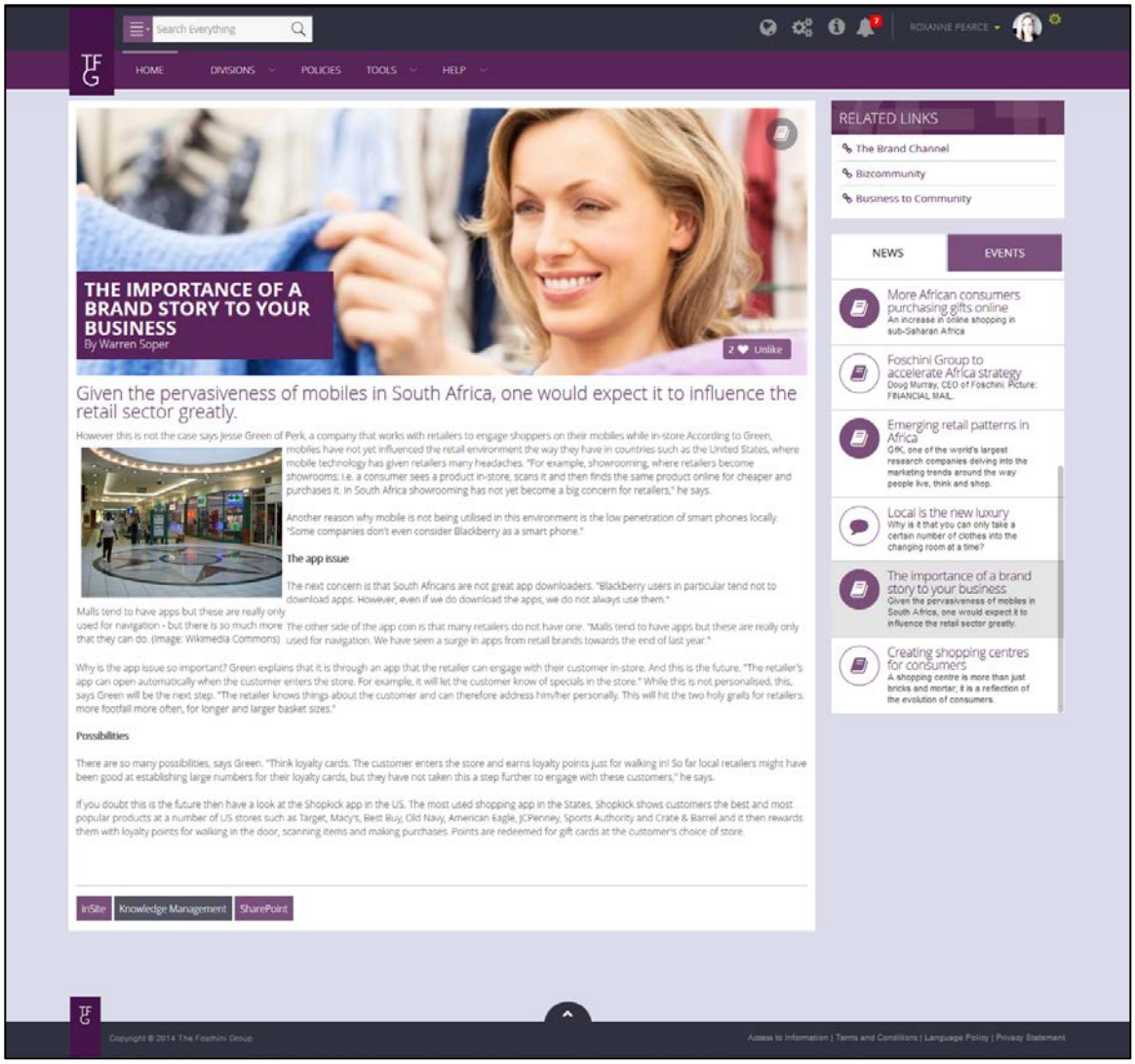



**Image 8. TFG Intranet: Article Page Example.** The article page on the TFG intranet is a simple, clean, and elegant design. Readers are given the option to view other articles and events with related content.
*119_TFG_08_ArticlePage_live.png*

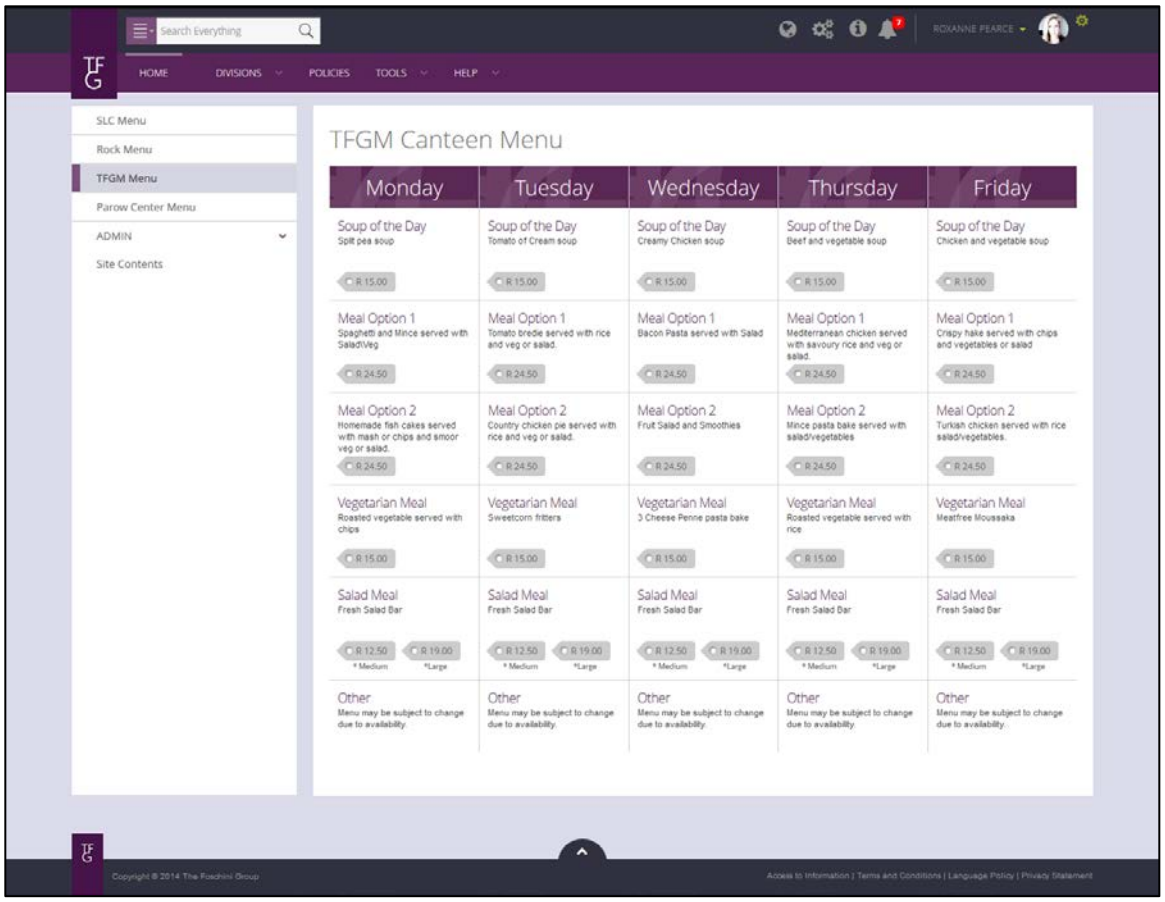



**Image 9. TFG Intranet: Canteen Menu.** The canteen menu is an important feature to help users decide if they want to order meals from any of the available canteens. Multiple canteens in multiple buildings are available for viewing. The canteen menu is neatly displayed in a weekly view layout along with the various meal options and prices. Only canteen administrators have access to update the meal options, descriptions, and prices. *120_TFG_09_CanteenPage_live.png*

## TECHNOLOGY

| TECHNOLOGY | |
|---|---|
| **Category** | **Technology Used** |
| **Web Server Hardware and OS** | • Microsoft IIS, Microsoft SharePoint 2013, Microsoft Server |
| **Bug Tracking/Quality Assurance** | • Microsoft Team Foundation Server |
| **Design Tools** | • Microsoft SharePoint Designer |
| **Site Building Tools** | • SharePoint 2013 Search Query Tool<br>• Sublime Text/Text editor<br>• Microsoft SharePoint Designer |
| **Content Management Tools** | • Microsoft SharePoint 2013 |
| **Search** | • Microsoft SharePoint 2013 Enterprise Search (FAST) |
| **Other Functions** | • CSS, JQuery, JavaScript, SharePoint CSOM, JSOM, SharePoint 2013 Rest API, PowerShell, Microsoft Visual Studio 2013 (for the staple feature) |

**Figure 4. TFG Intranet Technology**

## MOBILE

The team chose to employ a responsive framework due to the challenge of creating and maintaining a separate mobile site. “We felt it would be easier to use a responsive framework approach leveraging JavaScript and CSS/media queries to manage the viewing of specific content,” says Hall. “Therefore, optimization was performed for all devices unilaterally. All files were optimized and only loaded when the elements appeared on the page which was important for the best performance.”

The navigation collapses to a hamburger icon button to save screen real estate on mobile devices, and the *Back to top* link, which appears once the user starts scrolling, helps save scrolling and swiping time by jumping back to the top of page.

The mobile view displays most functional elements of the site, however, the strategy was to cater to the viewing experience rather than creating many opportunities for users to edit content. One of the primary goals behind the mobile experience was also to give users great search functionality, as this is one of the main uses of the intranet.

“We wanted to provide users with only information that was important and easily consumable on a mobile device,” says Hall. “The majority of our main intranet homepage was made mobile friendly, featuring access to things such as corporate news and events, the canteen daily lunch menus, search, and the like. We also invested in making the user’s personal collaborative profile space mobile friendly

which included their personal information, company information, weather reports, and notifications and discussions."

## SEARCH

The intranet search is powered by built-in SharePoint Search capabilities, providing a cost benefit to the organization. "The greatest thing with using Microsoft SharePoint 2013 as your CMS is that you now get FAST Search built in and at no additional cost," says Hall.

It also provides a high quality output.

"We believe it is best of breed for enterprise search," says Christo Greeff, Senior Technology Consultant, Intervate. "We used search extensively throughout the solution. Microsoft SharePoint 2013 incorporates FAST Search Server, which is arguably one of the best aspects of Microsoft SharePoint 2013, especially when we planned how we would build the various components for this intranet solution."

### Refining Results

The intranet team uses various methods to refine the search and search results, specifically structured content types and Result Sources functionality.

"We use structured content types — reusable collections of metadata — assigned to content in different areas and components in the solution," says Greeff. "We also make use of specific managed metadata (terms and term sets) to classify our data."

The Result Sources functionality also allows the team to limit the content of the searches in a very granular way. "We created TFG base content types for all our main content categories," says Hall. "Examples of these categories would be articles or our reports. We then configure the search engine to interpret these categories as Result Sources."

The Result Sources are presented using a tabbed control within the main enterprise search site, which allowed them to surface a specific category as a tab, using each of these Result Sources.

To assist with the refinement process the team standardized on a set number of important metadata fields and let users apply additional refinement on each tab by ticking any number of these standard metadata fields.

"For example," says Greeff, "the tabs on our search area are actually Result Sources styled to look like tabs. These 'tabs' allow us to surface only the content the user would want to see while clicking from tab to tab, but still using the same search phrase. Far more visible is the search box that follows the user throughout the site, which also makes use of Result Sources."

Content owners also have the ability to add keywords, thus helping to refine the search results even further.

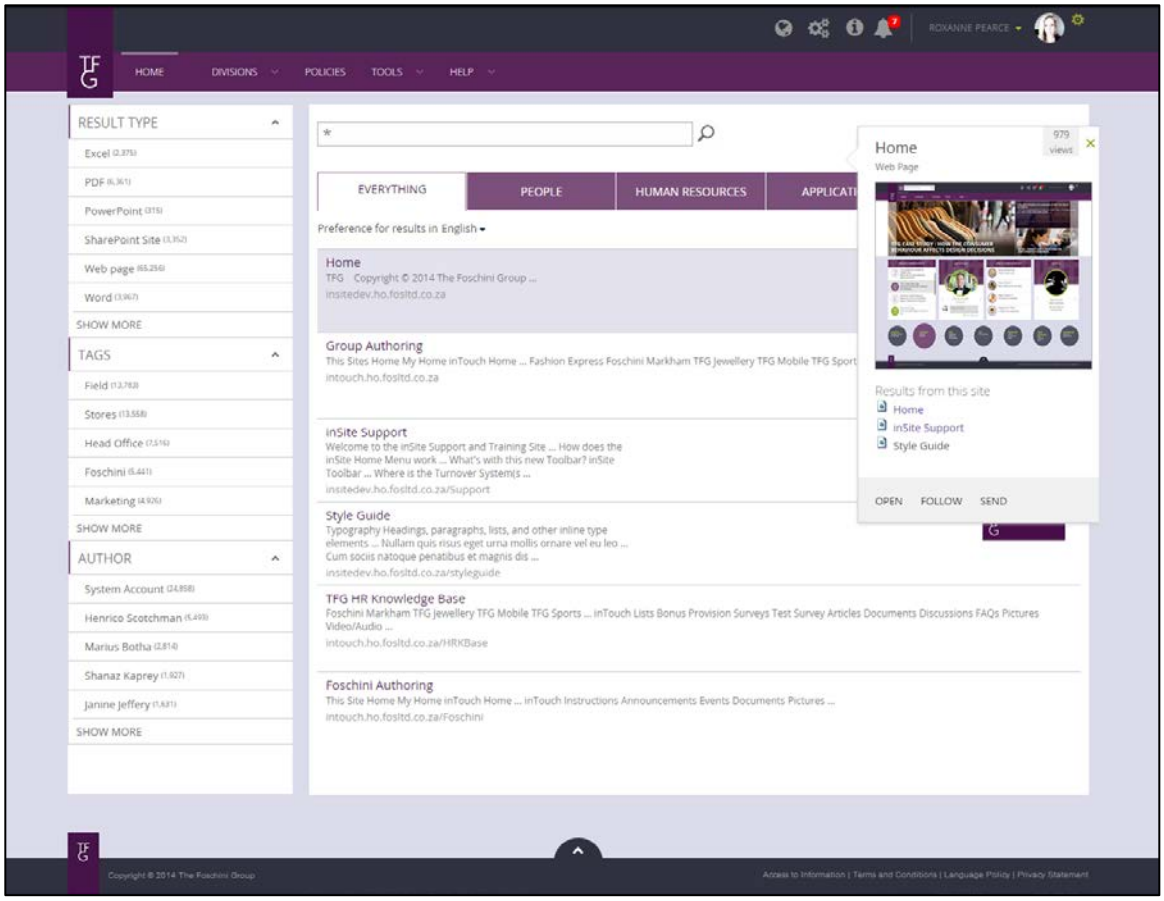



**Image 10. TFG Intranet: Search.** This is a standard search page on the TFG intranet. Multiple search scopes have been configured for use on the search page. Keeping with the visual theme of the intranet, the scopes have been incorporated to appear as tabs on the search page with the selected scope emphasized as the selected tab. *121_TFG_10_SearchPage_live.png*

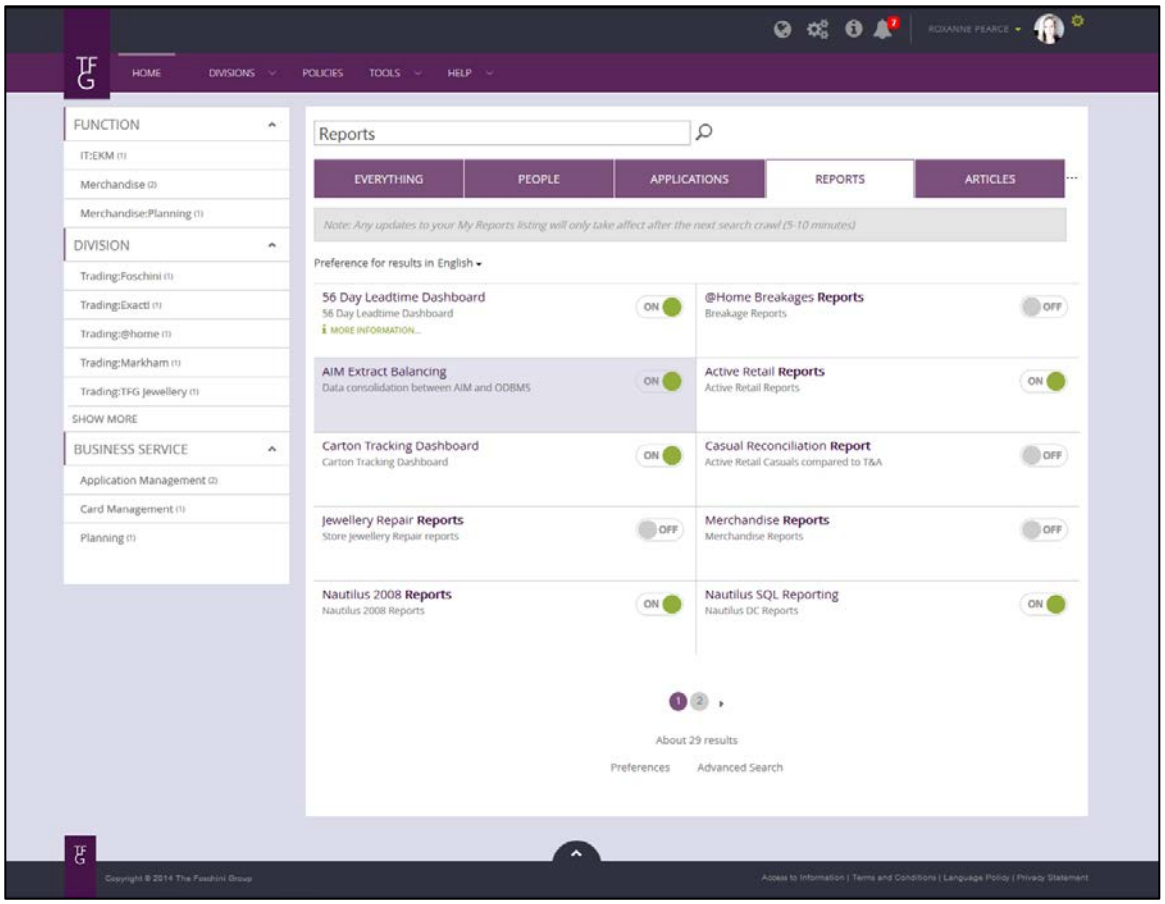



**Image 11. TFG Intranet: Search Results Toggle Functionality.** TFG intranet users are provided with functionality that allows them to toggle an on/off switch icon on each of the applications and reports in search results. Once an icon is toggled, the application or report will appear in their personalized *My Site* page in the *My Applications / My Reports* component. *122_TFG_11_ApplicationsReports_search.png*

## RESULTS AND ROI

When the bar is set very low, you have nowhere to go but up, and that is where the TFG team found themselves at the launch of the new intranet. “We were coming of a very low base from the previous intranet, so everything is better now,” says Botha. “The new solution is a big improvement across many pivotal areas, including dynamic content, search, providing accurate and up-to-date content, more defined content ownership, improvements in productivity, and so forth.”

The existing intranet was just a glorified set of index pages with really no search capabilities. “Now everything is bigger and better,” says Hall.

He notes one of the biggest successes is the user profile space, *MySite,* not only because of the improved SharePoint 2013 out-of-box features, but also because of some of the team’s custom improvements.

For example, a new custom feature allows users to have control of their own custom set of applications and reports, which on its own is a huge improvement over the old intranet. “It’s just one of the ‘wow’ factors of the new intranet,” says Hall.

It’s still early days with the new solution, however, so the team has a long way to go before they realize all the expected business benefits.

## LESSONS LEARNED

TFG team members share their lessons learned:

- **Strong collaboration can be magical. “**Strong collaboration between project team members is the best recipe for success. There is something magical that happens when you get the right people in a room — people with a shared vision and passion for what you want to achieve. We had this with this project!” –Botha
- **There is no substitute for hands-on engagement.** “We have found over the years that the best projects result from bringing in the right team members with the right skills, integrating teams (client and agencies), and working collaboratively in the same physical space, using Agile methodologies that encourage business interaction and frequent ‘show & tell’ sessions to get business buy-in to the product as the project progresses.” –Marc Fletcher, Director, Intervate
- **Start simply and work your way up to the more complex features.** “Build the simple components first. In doing so, momentum is created which helps with the more difficult aspects of the project.” –Greeff
- **Focus on quality not quantity.** “Keeping the intranet as simple as possible, requires as few components as possible. Time spent on each of the components is quite significant, but only because attention was given to minute details focusing on how the user will interact with each of these components. Most users might not even notice these details unless they stop and consider what the component does. I feel more users are starting to take note of small details as corporate systems become more user focused.” –Greeff
- **Find a project champion who knows the audience inside and out.** “The intranet needs a champion. Someone who knows the user base, their pain points, and where the most value will be added.” –Greeff
- **An Agile approach keeps everyone on the same page.** “Using an Agile Scrum methodology worked very well for us. Having quick morning stand-ups, which included each team member giving short descriptions on previous day’s work and plans ahead for the day, kept us all in the loop and allowed us to catch issues early.” –Hall
- **Find the cheerleaders in the organization and listen to what they have to say.** “Understand the passion and inspiration of the organization. Speak to the right people. Speak to people who are passionate about the corporate brand.” –Botha

- **Start with why.** “At Intervate we adopted the Simon Sinek idea of ‘Start with Why’. Starting with ‘why’ helps business users focus on what’s actually important to the business and the businesses’ culture. We try and kick-off all projects, including intranet projects with this concept and encourage our clients to get on board with this idea so that we have a shared vision. The TFG team completely understood this concept and was a strong advocate of this ideal.” –Fletcher
- **Involve the right mix of experts.** “From a technical and UX design point of view, have developers or technical people who understand some design and have design people who understand some development. I do not believe that a designer who is fully technical or a developer that is fully skilled in design, can deliver the same solution, as different people who focus in their area of expertise. I feel that our team had the right mix of technical and design focused people.” –Greeff
- **Test early and often. Be thorough.** “Allow for as much time as possible for manual testing of UI elements. Especially when implementing for cross browser and for mobile.” –Greeff
- **Optimize content based on what’s appropriate for the platform.** “Design mobile for a read view of intranet content as much as possible and leave the full UI experience for the browser.” –Greeff
- **Don’t underestimate the time required to support trailing technology.** “As is the case with many corporate environments, catering to older browsers is still a necessary evil, as the upgrade cycle in large organizations is quite long. We always knew that we would have to cater to an older browser such as IE8, but it was surprising how quickly we get used to the standards on the newer browsers and how quickly we forget the ‘gotchas’ when building for the older browsers.” –Greeff
- **Focus on the user experience first before styling.** “A beautiful interface is important, but the key factor is that no design will work if you do not take into account the user experience. Every component designed was thought of in terms of how the user will interact and feel while using the component. This includes ease of use, responsiveness, and attention to detail, to name a few.” –Pearce
- **Design without boundaries.** “In many cases we design allowing the perceived functionality to dictate what is possible. This might be due to what the designer knows about the technical limitations of the platform, the targeted browsers, or due to what the designer perceives to be possible during implementation. There should be no creative bounds in order to exceed design expectations.” –Pearce

# eBay, Inc.

## OVERVIEW

### COMPANY

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

**Headquarters:** San Jose, California

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

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

**Annual revenue:** $8.97b (2016)

### THE INTRANET

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

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

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

### TEAM

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

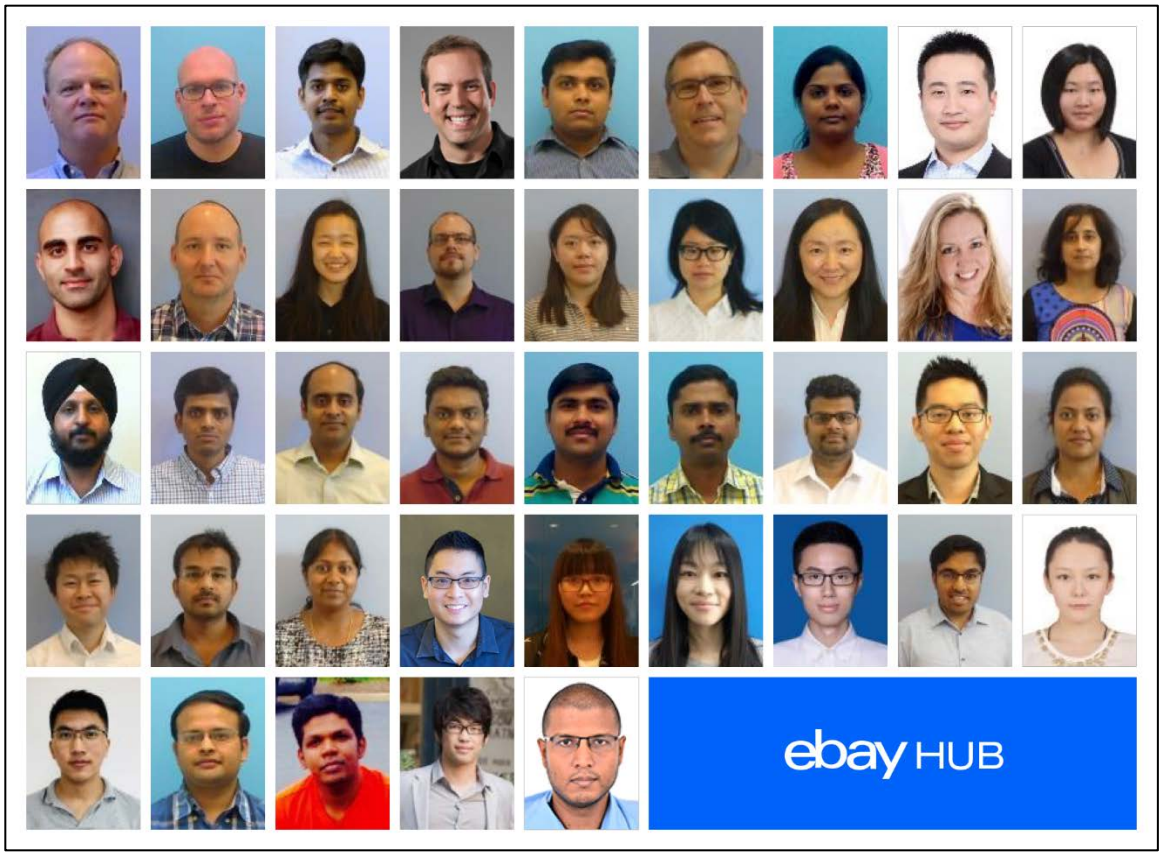
**Office of the CIO:** John Kelly, Sr. Director Enabling Functions; Adam Garner, Sr. Manager Product Experience; Yoga Ettiyappan, Engineering Lead; Jarod Stanton, Manager, Business Relationship; Darren Zhang, Shanghai Lead

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

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

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

## INTRANET TEAM




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

## HIGHLIGHTS ABOUT THIS WINNER

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

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

## BACKGROUND

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

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

### Goals

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

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

### The Challenges of Building a Platform from Scratch

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

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

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

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

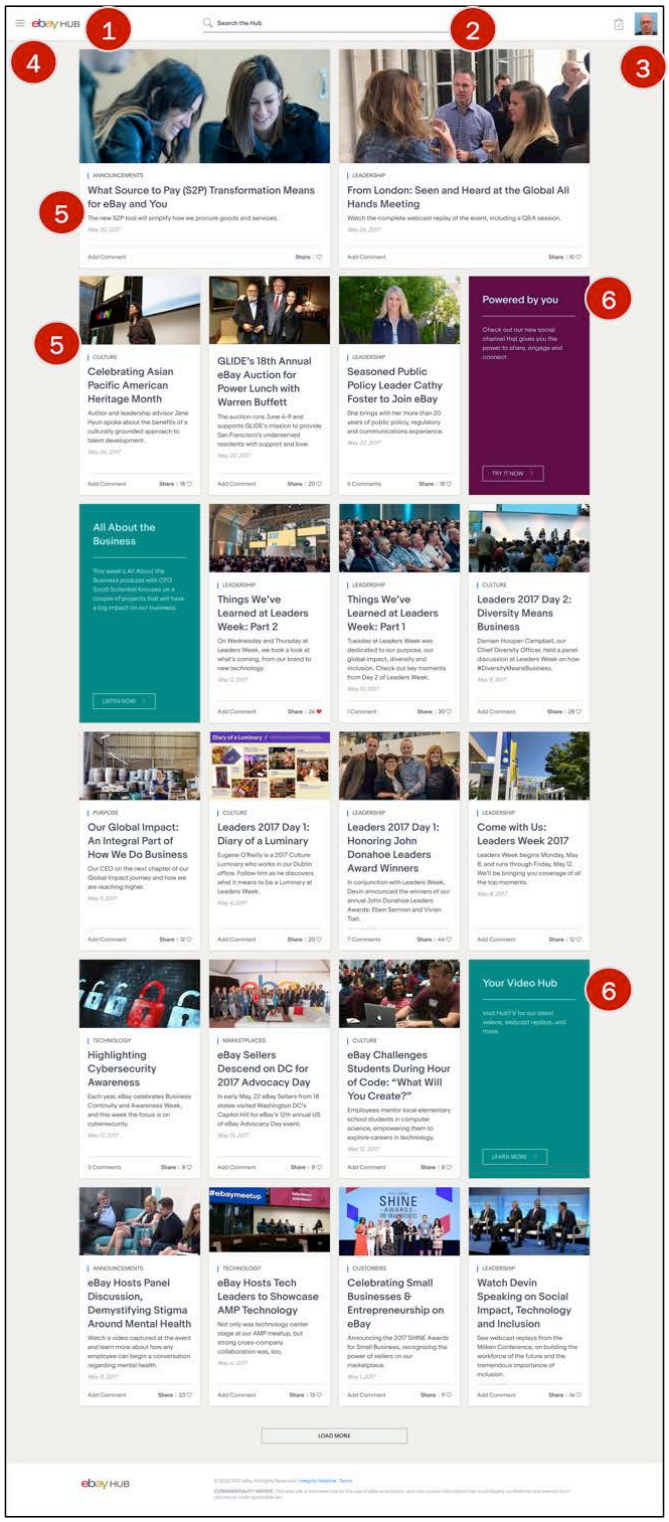
  The organization engaged Octopus Design, based in Santa Cruz, California, to help guide and clarify the designs and set the stage for what would eventually launch.

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

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

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

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




## Homepage

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

## Homepage Highlights

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

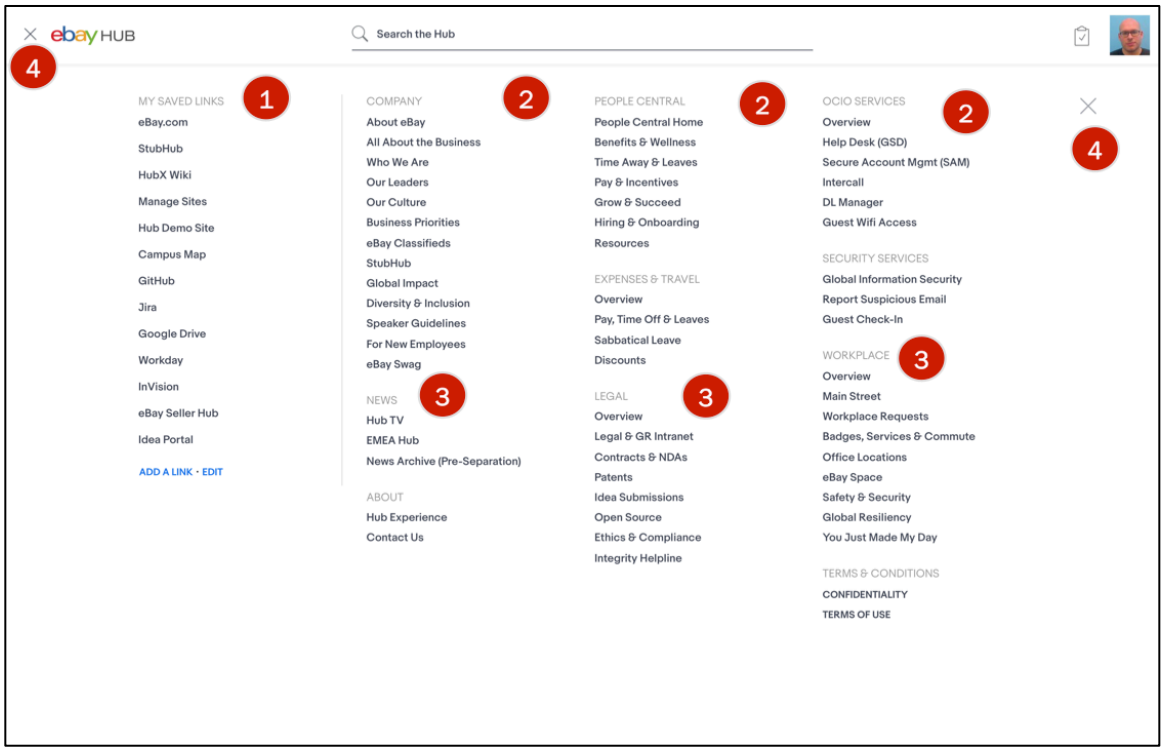
The thrust of the homepage is clearly about keeping employees informed, which makes sense given that the redesign's primary goal was to communicate news. The page is consumed by news items arranged in a scannable grid.

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

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

other news on the homepage, while also giving the homepage a modern visual look.

## Megamenu



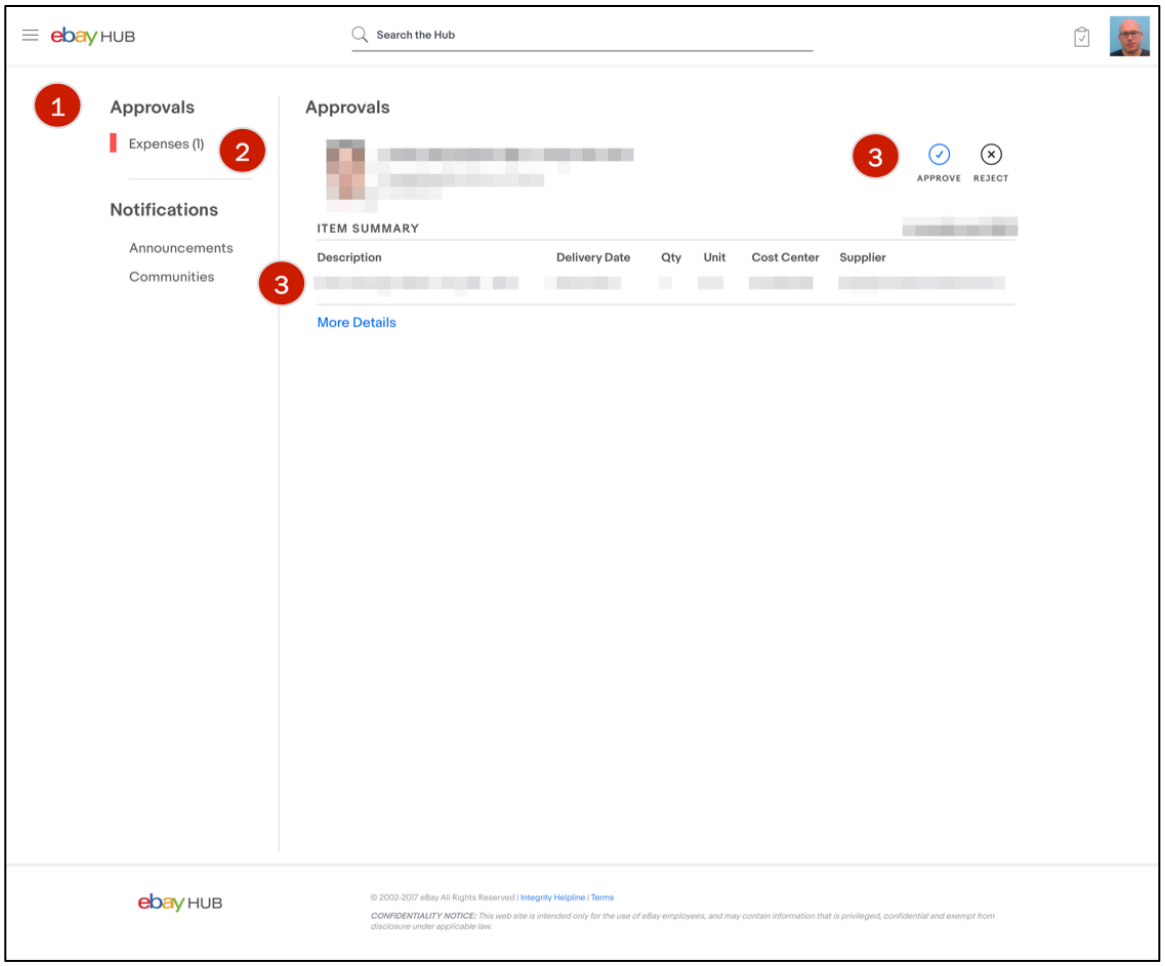

**Pictured: eBay Intranet Main Menu.** The main menu on the eBay intranet includes links to the most-used areas and tools. *56_eBay_02_MainMenu.png*

### Megamenu Highlights

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

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

## Notifications



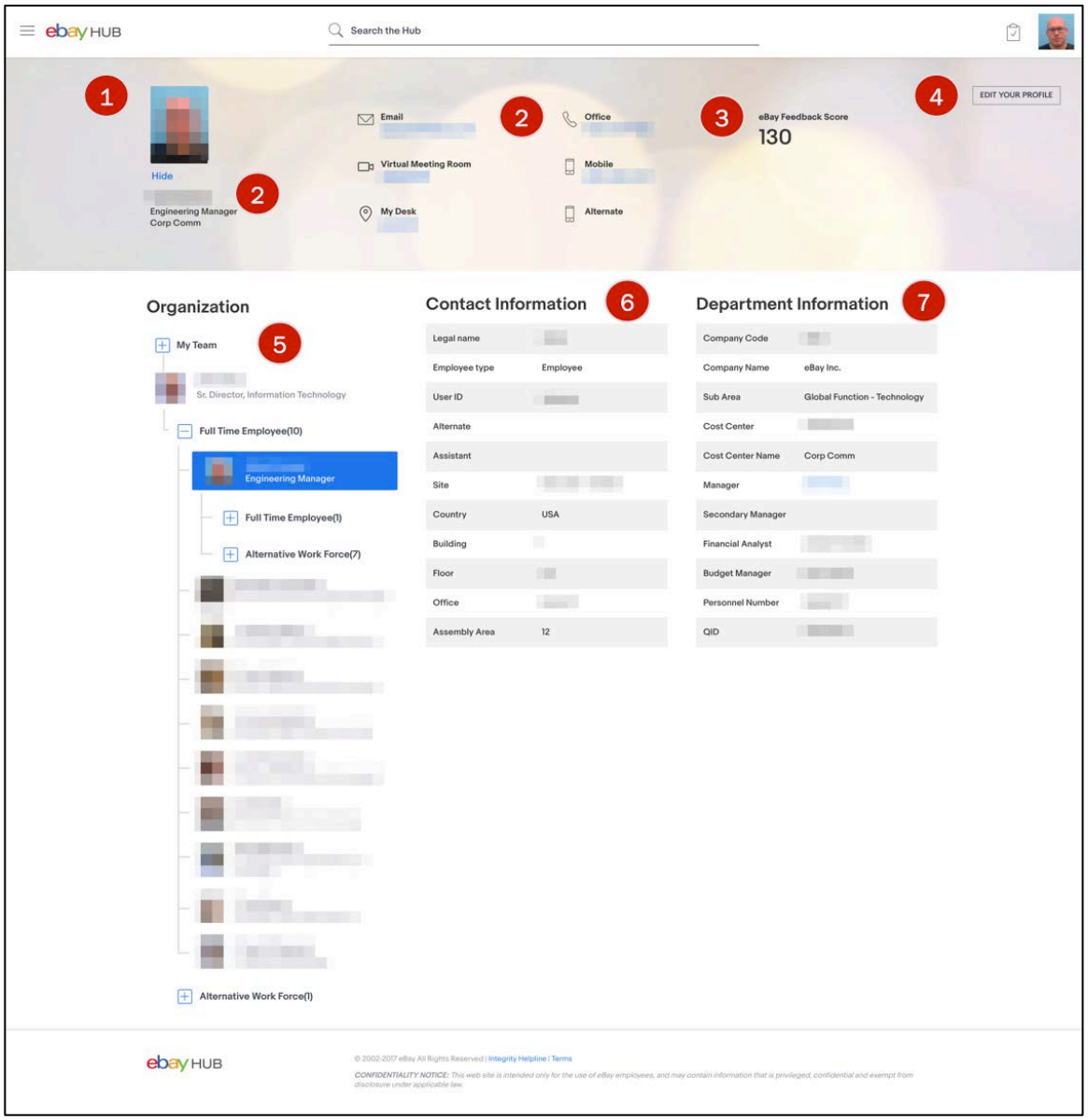

**Pictured: eBay Intranet Notifications.** This area gives employees confidence that they will be notified when something requires their attention.
*57_eBay_03_IntegratedNotificationsAndApprovals.png*

### Notifications Highlights

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

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

## Employee Profile




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

## Employee Profile Highlights

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

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

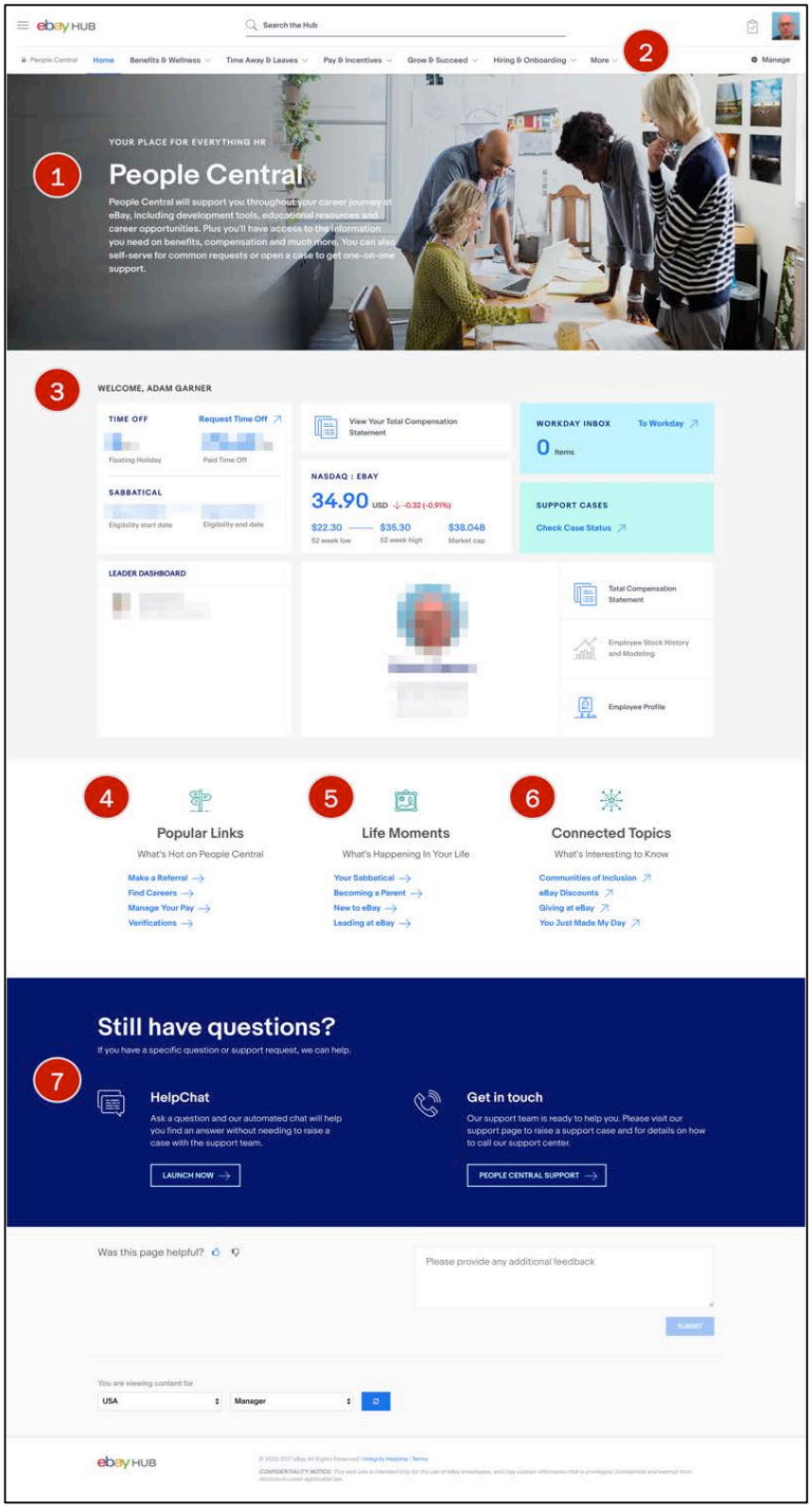
## Thank You Cards

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

## Thank You Cards Highlights

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

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



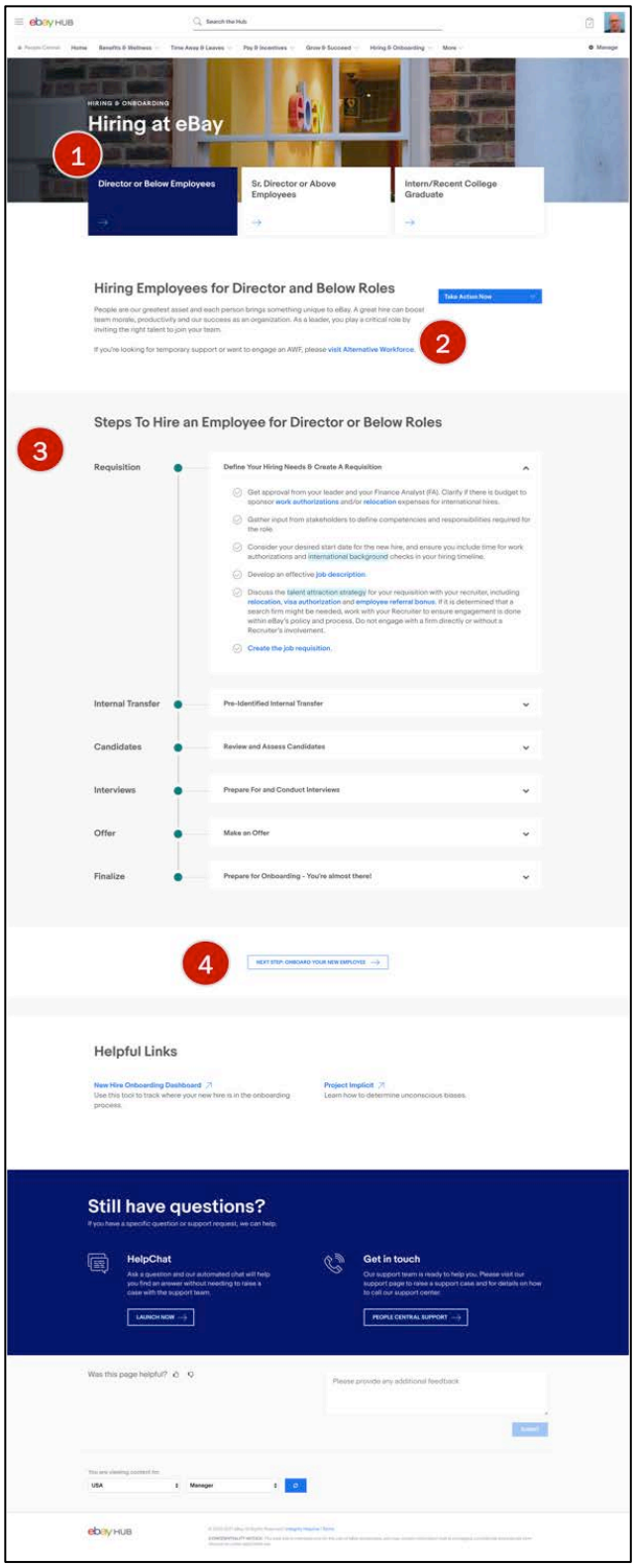

## HR Dashboard

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

## HR Dashboard Highlights

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

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



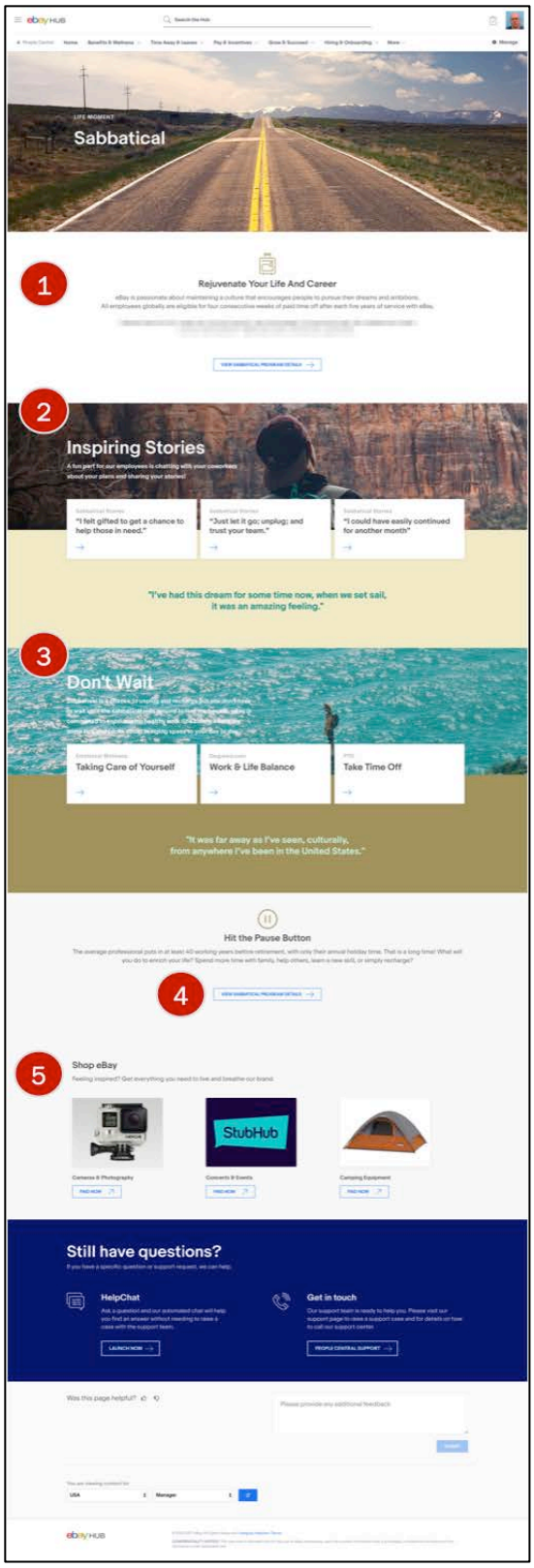

## Hiring

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

### Hiring Highlights

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

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




## Sabbatical

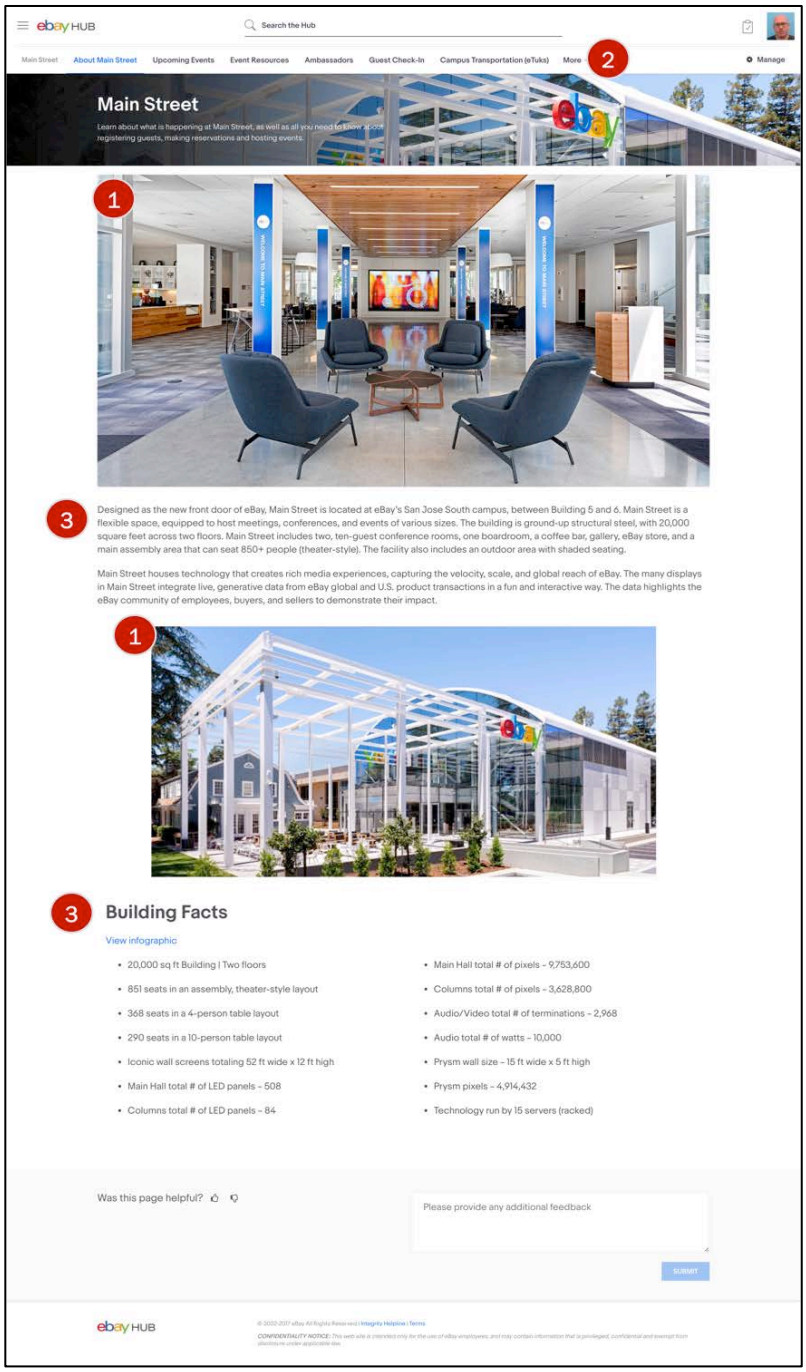
**Pictured: eBay Intranet Sabbatical Page.** The page about taking a sabbatical at eBay gives employees an exciting adventure to strive for. *62_eBay_08_Sites-PeopleCentral_Sabbatical.png*

### Sabbatical Highlights

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

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

## Office Location




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

### Office Location Highlights

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

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

## DESIGN PROCESS AND USABILITY WORK

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

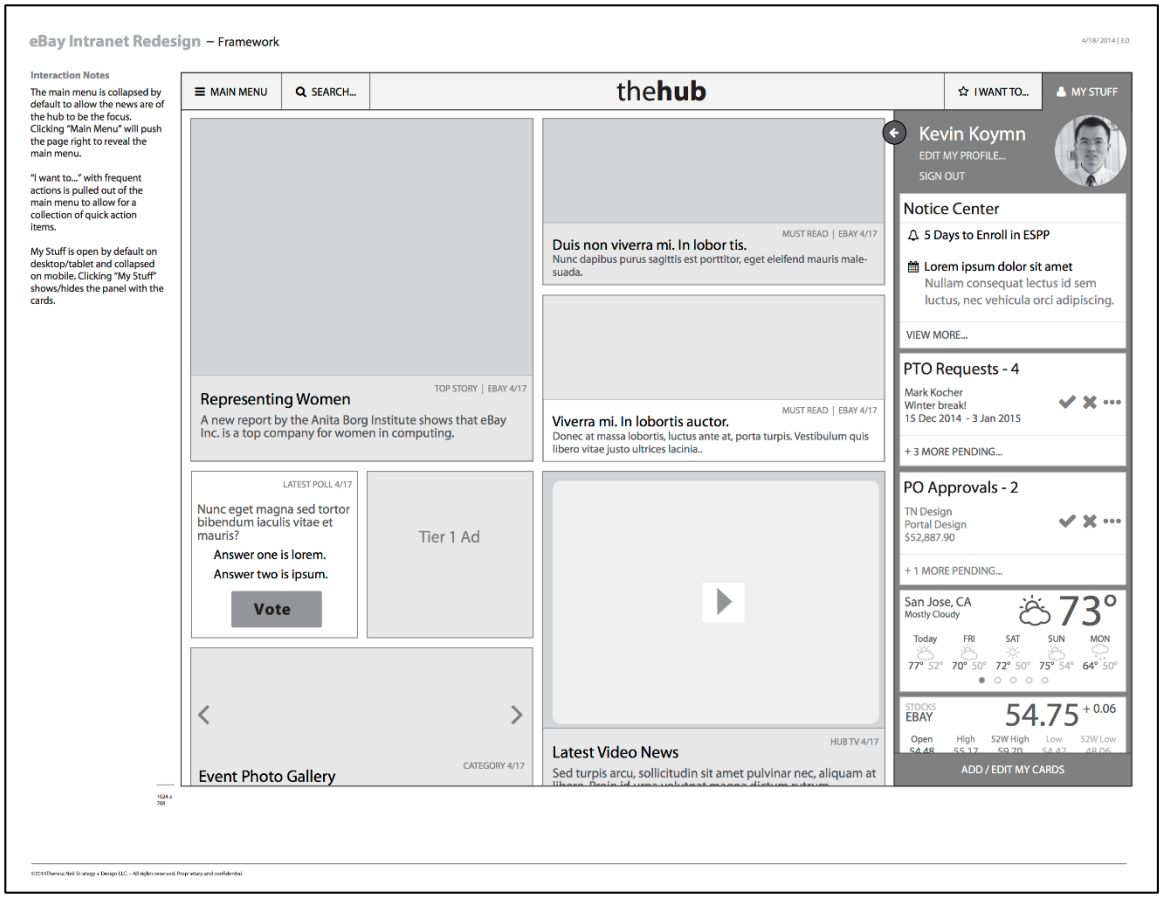
As the project kicked off, team members conducted significant up-front user research, including having an on-site user researcher conduct 1:1 interviews. They also held group sessions, sent out surveys, and analyzed the old intranet's available analytics. The cumulative effect of these efforts helped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

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

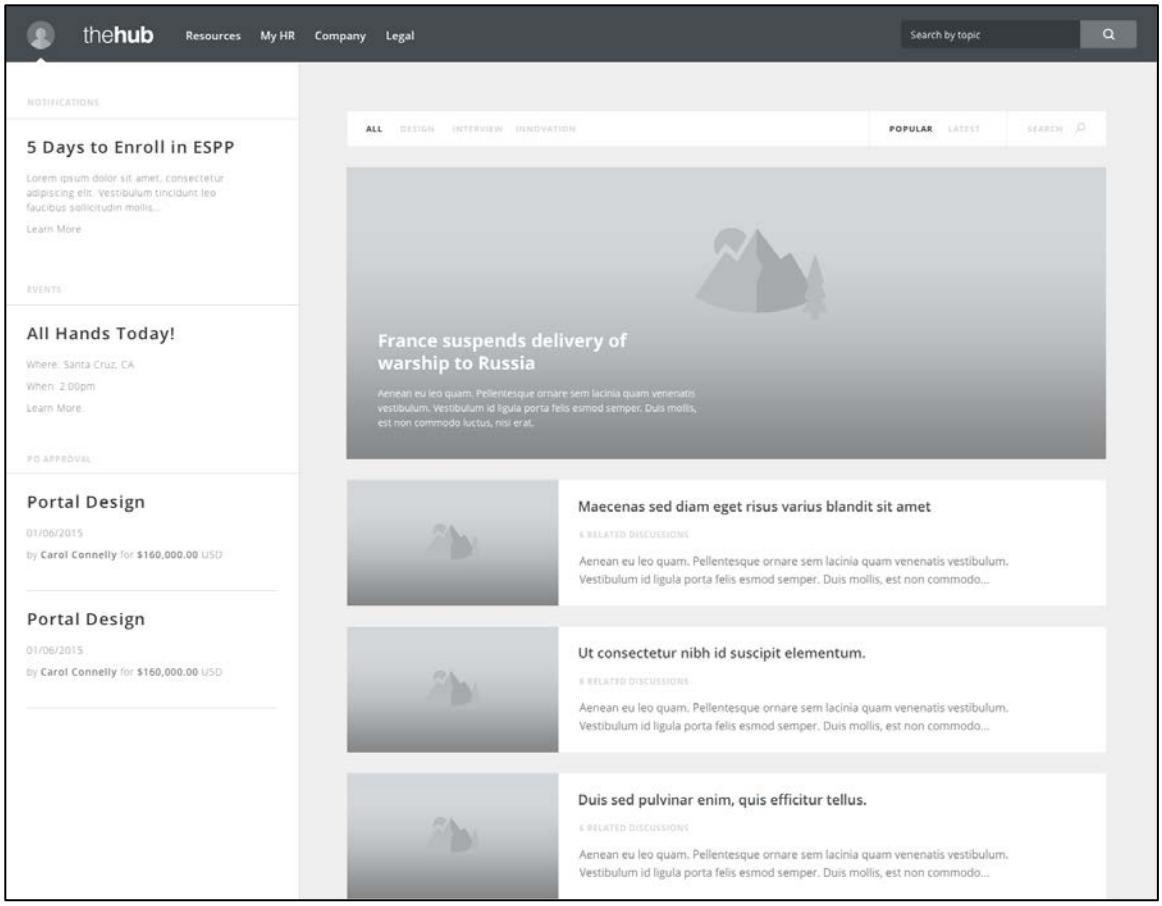
As the project has moved from launch phase to ongoing improvements, the focus is now on mobile development. Because it's a new platform, discovery and understanding in this arena is critical. The mobile user research so far has been informal and somewhat "guerilla" in nature, with team members often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

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

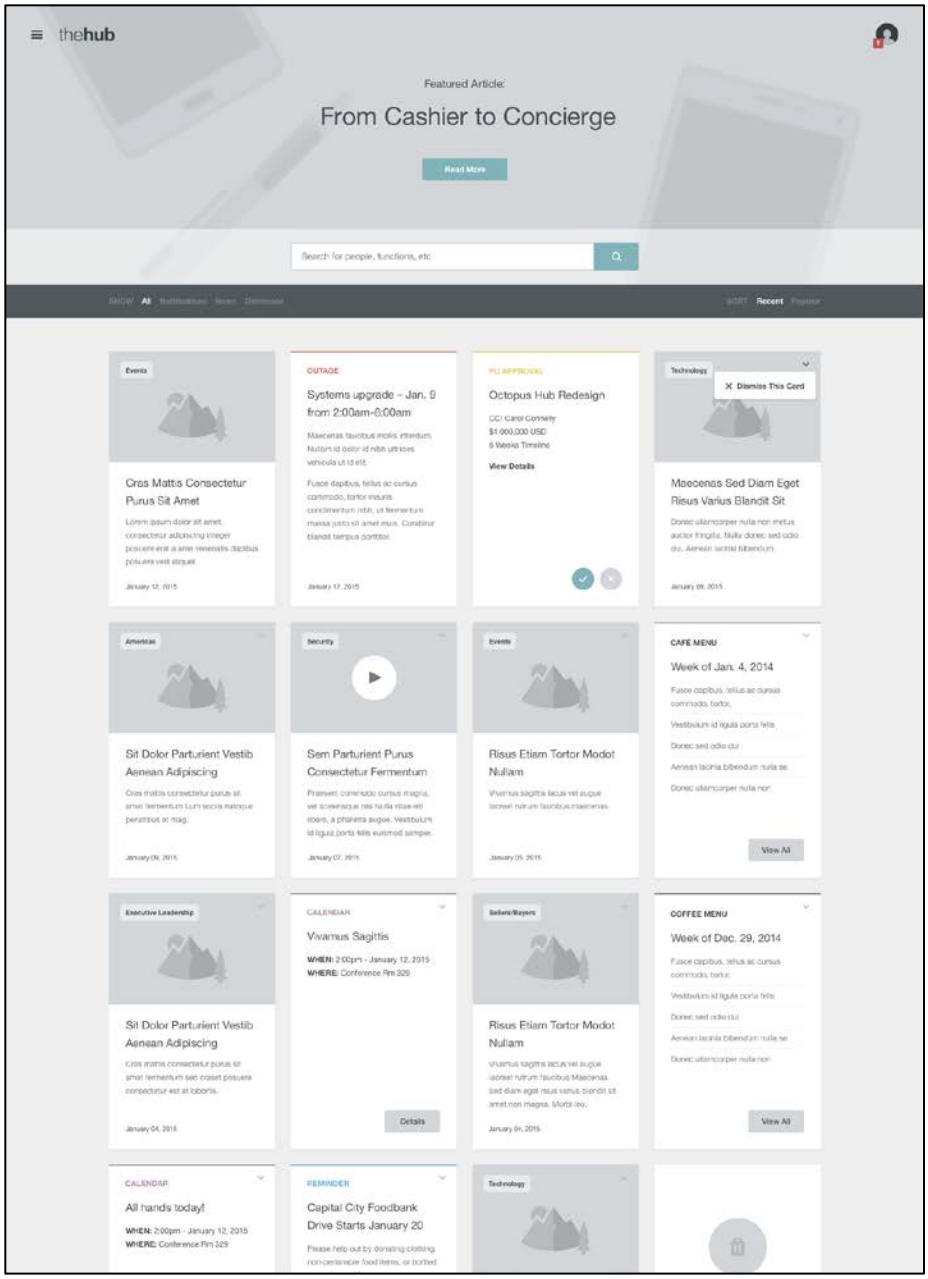
| WORKING WITH OUTSIDE AGENCIES | |
|---|---|
| **Agency** | **Project Role** |
| **Zurb** | • Initial concept work (2014) |
| **Octopus Design** | • Idea refinement, wireframes, visual design treatments (2014-2015) |
| **CapGemini** | • Ideation, wireframes, product design (late 2016) |




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




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




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

## GOVERNANCE

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

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

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

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

## URL AND ACCESS

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

## TIMELINE

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

## CONTENT AND CONTENT CONTRIBUTORS

### Content Governance

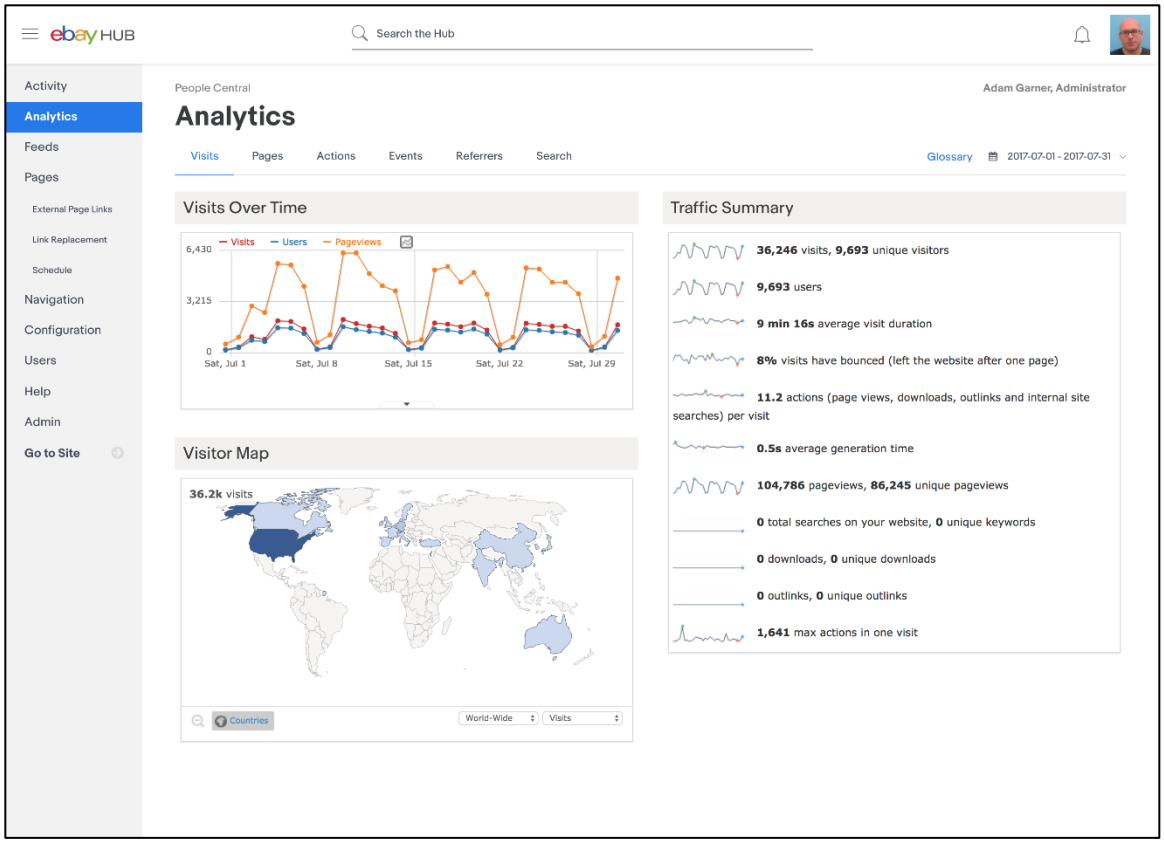
The eBay content governance structure is a shared responsibility of the Hub Team within OCIO and the Employee Communication team within Corporate Communications. All new requests come in through either the Employee Communications team or other business units across eBay. In the latter case, the intranet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

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

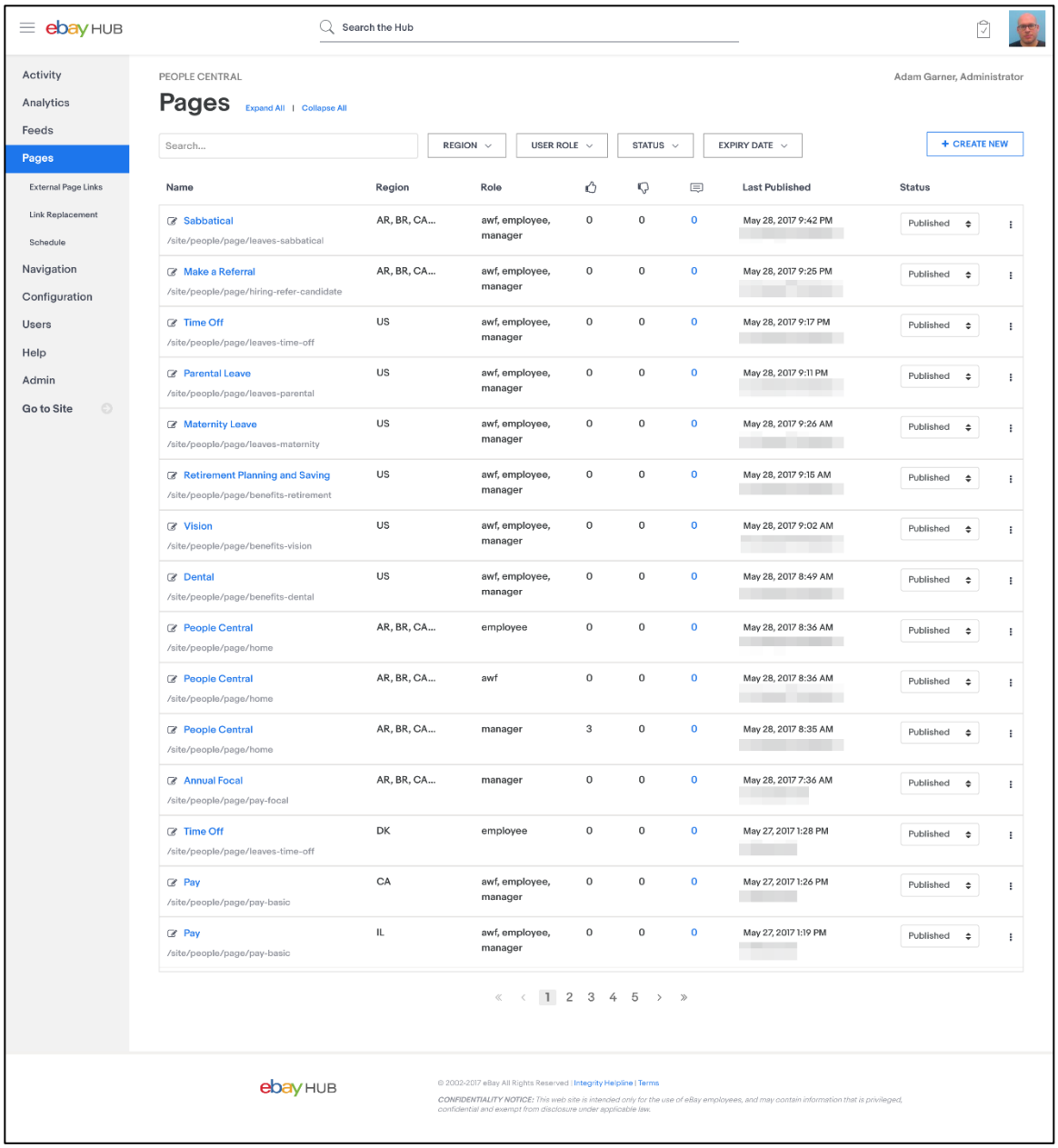
Other key content management areas are accomplished as follows:

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

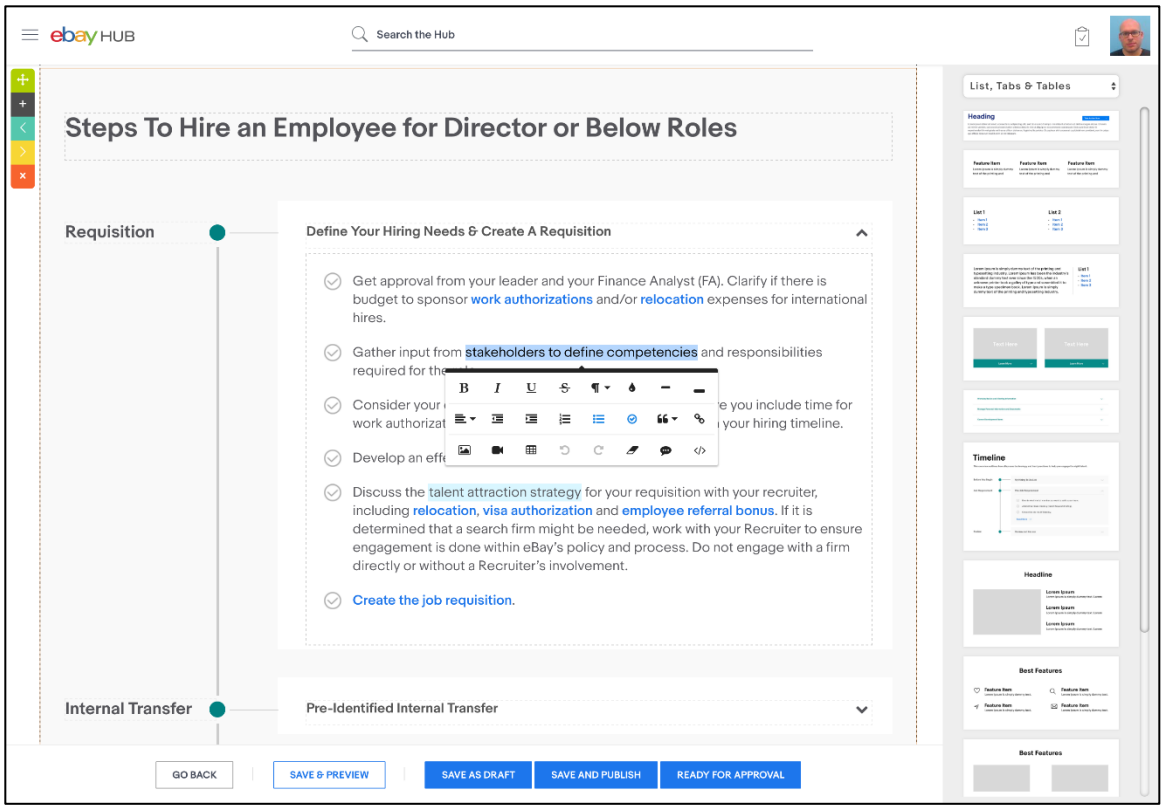
  Also, as the company retired the old SharePoint installation, it instigated a process of having content owners either remove content or migrate it to SharePoint online (O365), to the Hub, or to another platform depending on requirements. This helped clean up more than 30,000 sites on the legacy system.




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




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




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

## TECHNOLOGY

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

### Mobile Approach

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

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

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

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

The pilot mobile app is built as native iOS, and an Android version will follow. The team targeted iOS first as it's the predominant platform among eBay employees. The

goals are to provide frictionless yet secure content access, and enable users to complete actions and be alerted to tasks on the go.

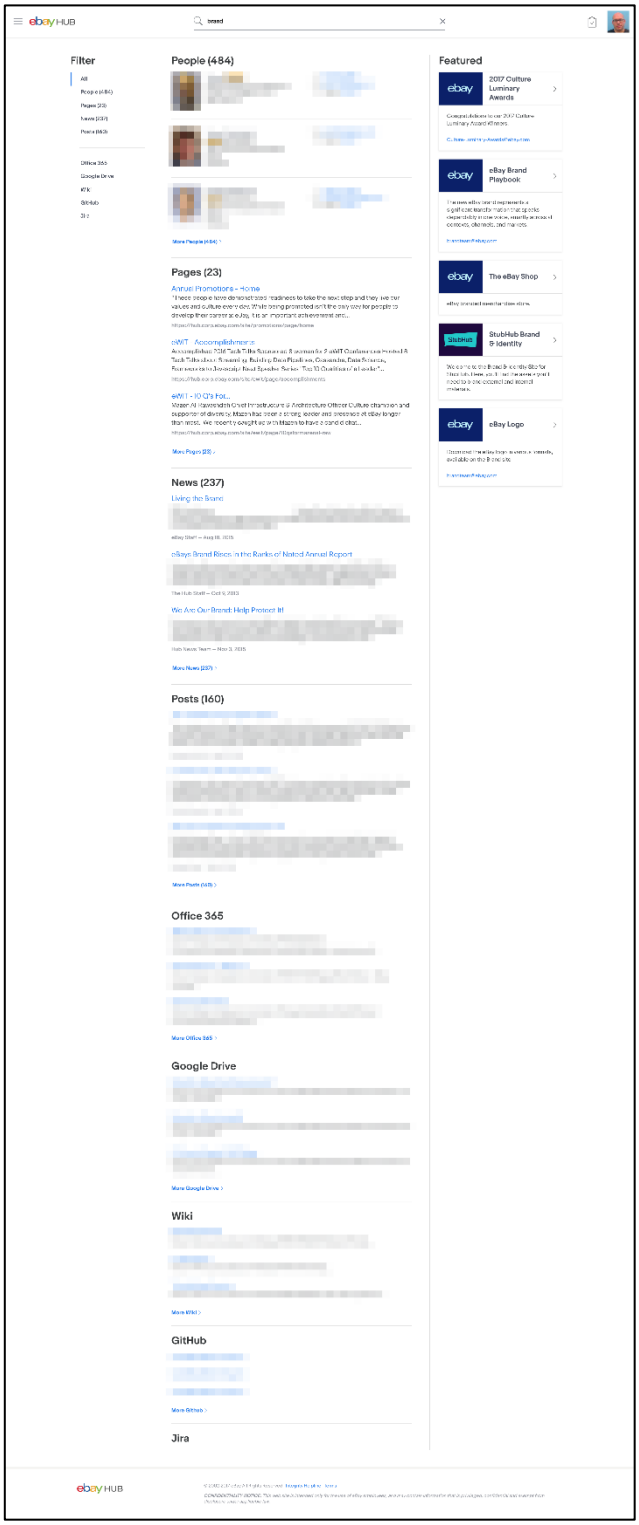
### Search

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

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

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

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




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

## ROI

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

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

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

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

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

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

## LESSONS LEARNED

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

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

# Flight Centre Travel Group (2019)

## OVERVIEW

### COMPANY

Flight Centre Travel Group is the world's largest independent travel company, specializing in vacations, tours, and corporate travel. With more than 19,000 global employees, Flight Centre serves its customers online and through more than 2,800 retail outlets in over 90 different countries across more than 40 different sub-brands. Founded in 1982 in Brisbane, Queensland, Australia, Flight Centre takes pride in its expert travel knowledge and excellent customer service.

**Headquarters:** Brisbane, Australia

**Company locations:** More than 2,800 retail outlets in over 90 different countries.

**Locations where people use the intranet:** 44 locations across the UK, with plans to roll out across the EU; after that, plans are in place to carry out a global rollout.

**Annual sales:** EU: £1.32 billion; globally: £11 Billion

### THE INTRANET

**Users:** The intranet currently serves an initial group of 1,892 users across 130 locations. These users need access to accurate information on the latest travel offers, local expertise, and travel information from anywhere in the world. Users span sales, operations, finance, marketing, and travel consultants, all the way to the leadership team.

**Mobile approach:** Responsive web design and a dedicated IOS and Android app

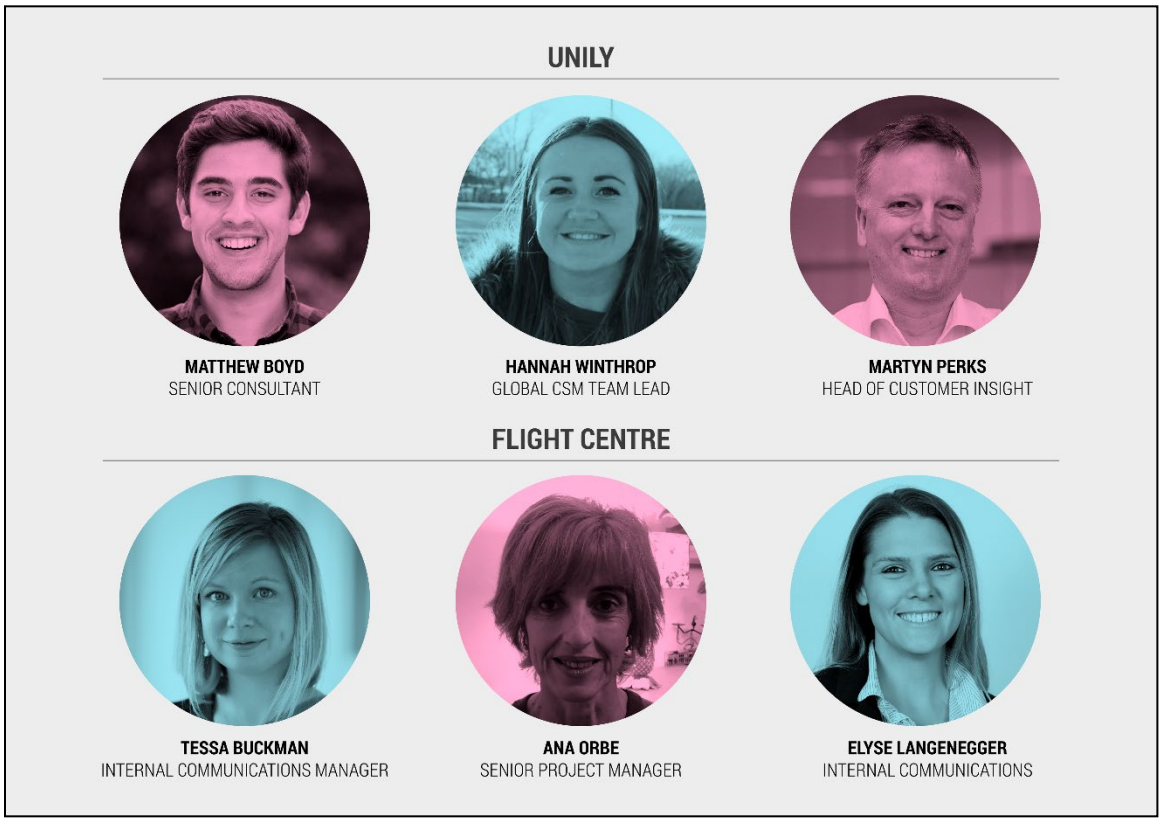
**Technology platform:** Unily

### TEAM

**Internal team:** Tessa Buckman, Head of Internal Communications; Elyse Langenegger, Internal Communications.

**Unily (formerly BrightStarr):** Matthew Boyd, Senior Intranet Consultant; Hannah Winthrop, Team UK Lead, Customer Success Manager.

## INTRANET TEAM




**Team members shown here** (top row, left to right—Unily): Matthew Boyd, Hannah Winthrop, Martyn Perks; (bottom row, left to right—Flight Centre): Tessa Buckman, Ana Orbe, Elyse Langenegger.

## HIGHLIGHTS ABOUT THIS WINNER

Information and tools on the Flight Centre Travel Group's *PILOT* intranet truly support employees' needs. Administrative tasks, sure; but also the nitty-gritty little things that make a one-of-a-kind intranet—like knowing when any global incident occurs that might impact customer travel, or finding resources that a trusted teammate deemed valuable.

- **Content that supports jobs:** In numerous places, the intranet's information supports the way Flight Centre employees work. One of the more interesting examples is the site tracking and the way the site facilitates communication of world events that could cause or have already caused travel interruptions. Knowing this information helps employees start to deal with potential issues long before customers begin to contact them.
- **Applications and tools:** Employees can access business tools and applications on their list on the targeted homepage. Also, an application search feature makes it possible to find apps not in their list. This puts PILOT at the center of Flight Centre's digital workplace.

- **IT:** A combination of simple self-service options and one-to-one assistance make it easy for Flight Center employees to quickly unravel any technology knots. The IT system status information, accessible from the homepage, makes it easy for IT to inform all employees about system outages. It also helps employees find information to simply solve problems on their own.
- **Perks:** The team made a smart move and a killer app all at once with the *Travelwise* feature, which lets employees access many special travel discounts. Once this feature went live, usage took off and has never come down.
- **Employee search:** Exhaustive metadata, filtering and sorting options, and attractively presented results make searching for colleagues as pleasant as going on vacation. Skype for Business integration expedites one-click calling right from the search results.

## BACKGROUND

Flight Centre has been offering advice and making travel arrangements for customers since 1982, when it opened its first store in Sydney, Australia. Today, 36 years later, it is one of the world's largest and most successful independent travel retailers. As the company has grown, so has its need for effective two-way communication, knowledge sharing, and seamless collaboration between globally dispersed employees in various job functions. To support Flight Centre's objective of delivering superior travel experiences, a new intranet was implemented to:

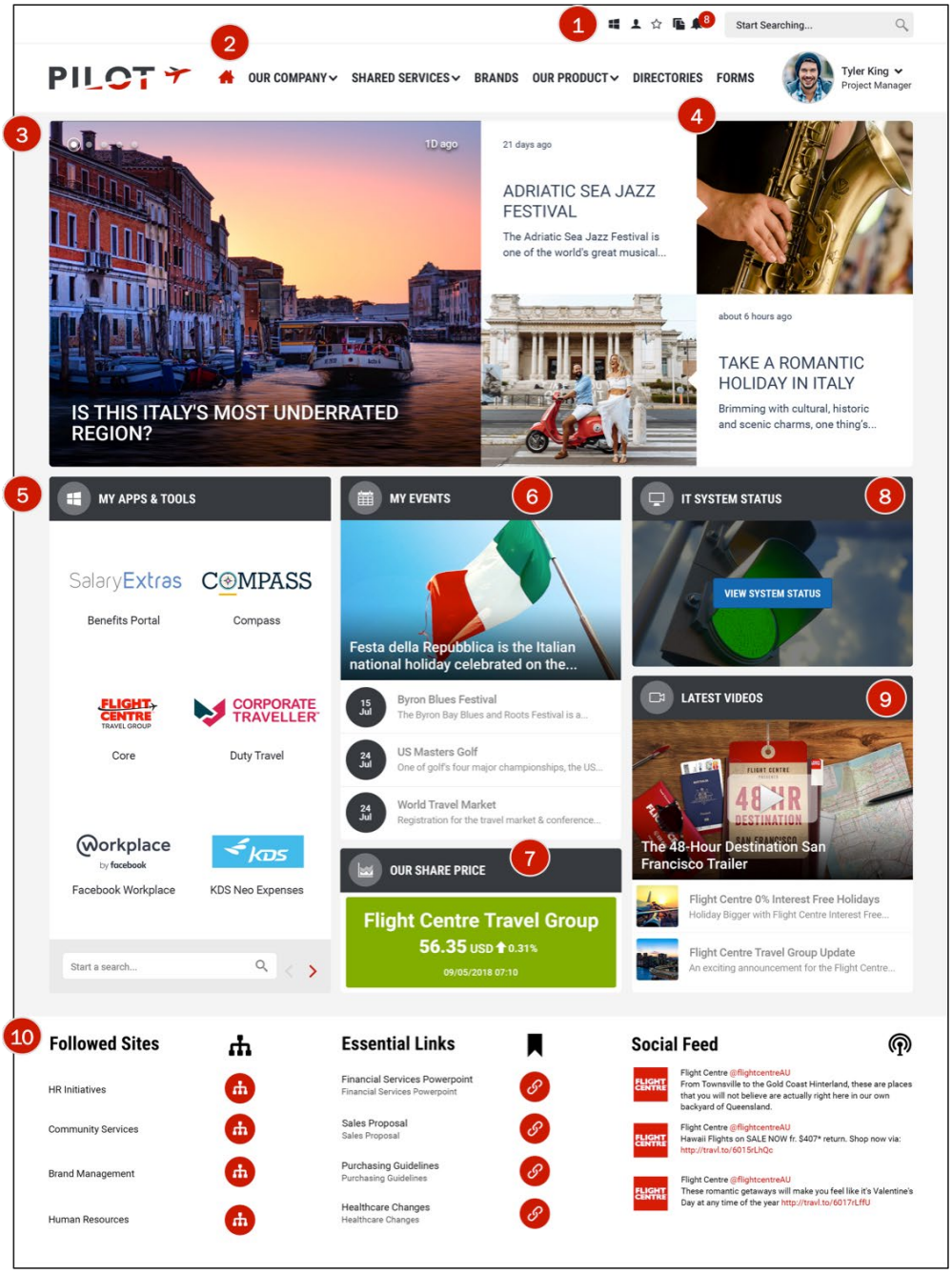
- Bring together employees working across seven different travel sub-brands in the UK.
- Give them access to accurate, real-time information to improve the quality of their customers' experiences.

Flight Centre's vision for its new intranet project was to deliver a digital workplace platform that would let users quickly find accurate information wherever they are, from any device.

The platform offers a highly engaging UX while distributing expert travel knowledge to users in a timely and highly relevant manner. Content targeting allows content owners to ensure that the most relevant information reaches the right people based on their location, function, and brand. Employees now have quick and easy access to SMEs, which lets them unlock tacit knowledge from around the business. In addition, all of Flight Centre's business applications have been integrated with the platform in a security-trimmed manner, so users are one click away from all the business applications they need to do their jobs. Since launch, the platform has reduced emails by 88% with 97.5% of staff active. From May to June 2018, usage soared, with 12,085 profile searches, 195,858 views, and 48,593 sessions across the platform.

## DESIGN REVIEW

### Homepage




**Pictured: Flight Centre Intranet Homepage.** The homepage on the Flight Center Travel Group intranet presents a lot of information in a scannable, low-pressure format.

### Homepage, Highlights

The Flight Centre Travel Group's intranet homepage aims to target the best and most current information to each employee. PILOT displays homepage news, events,

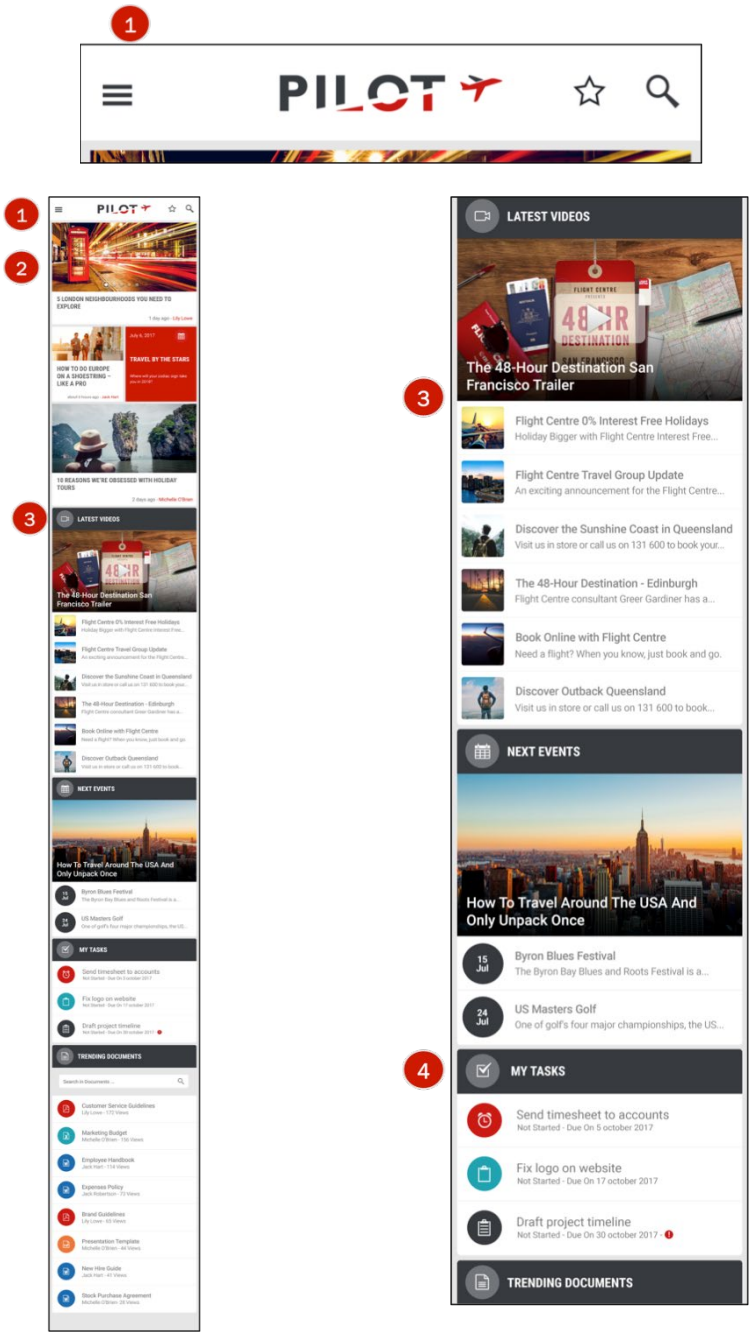
and videos based on the logged-in user's location, business, and function at the organization. This role-based approach makes the vast amount of content produced across the organization manageable. It also makes it possible for the Flight Center's diverse user population to be effective using the same tool.

The PILOT homepage's visual appearance is lively but uncluttered. The subheadings for each section include large white text on a grey background. This consistent visual treatment makes sections easy to decipher.

1. **Utility navigation:** The search field appears in the far upper right of the page, along with a few icons. These icons let users open a menu of their applications, find employees, access their favorites, open the document find page, read alerts targeted to them, and mark content as a mandatory read. The global search has extensive functionality including: search the overall site, documents, policies and procedures (through the SharePoint site), applications, people, teams, and suppliers.
2. **Global navigation:** Six level-one topics appear as the global navigation links. A professional-looking site logo appears to the left of the global navigation, and the logged-in user's picture and name appear to its right. Here, users can open a menu of their applications, personalize the intranet with their chosen topics, favorite a page, and access their favorites and read alerts targeted to them.
3. **Top news item:** A top news item, which might have either a global or local focus, appears in the upper right on the homepage. The large attractive image gives a sense of the topic and draws employees in, while the article's title appears in legible text. The article's time since posting also appears in small letters on the image to show how current the news is.
4. **Other news:** Two more news items seize the space to the right of the main image. Each of these items has a smaller, but still attractive, image; a large title in all caps; a short sample of the article's text; and the time since the article was posted.
5. **Applications and tools:** The *My Apps & Tools* section brings to the fore the business tools and applications—from O365 and other sources—that logged-in users need. Having these at their fingertips can only help employees be more productive. Users can also easily find more applications not on the homepage by using the application search feature at the bottom of this section. This feature opens a world of applications to all employees.
6. **Events:** The *My Events* area displays upcoming events relevant to the logged-in user.
7. **Stock price:** At the request of the senior leadership team, the company's stock price appears on the homepage in the *Our Share Price* section. The current share price appears in large white bold numbers. To its right, an arrow shows whether the price is up or down, and a number indicates how much it has moved. The information is kept current, updating every 15 minutes. Displaying the stock price helps promote employee awareness about the organization's performance.

8. **IT:** The homepage's IT section*, IT System Status,* provides a link to the IT service page. The blue button offers a call to action: *View System Status*. IT system status may not seem like something employees often need, but once they click it, they see an overview of the real-time status of all business systems. So, if users are wondering if an application is having issues, they no longer need to call IT or look for an email announcement to find out. This feature also eliminates the need for IT to send out service status email notifications (which were previously sent every 15 minutes when a service was having issues) or answer support calls about down apps.
9. **Videos:** The *Latest Videos* section includes the top three videos, with one more prominently displayed than the others. The videos displayed are based on the logged-in user's role. Clicking on a video allows the user to see the video archive.
10. **Footer:** The page footer includes three columns of links with large bold black text for the subheadings. *Followed Sites* lists links to four PILOT areas that most users choose to follow. *Essential Links* lists links to four initiatives, processes, or announcements that all employees should know. The *Social Feed* column displays the three most recent tweets made on the recent@flightcenterAU Twitter account. This helps keep employees apprised of what the organization is putting out to the public. The page's footer area is subtly distinguished from the rest of the page visually by the absence of grey page background and a different subheading text style.

## Homepage, Mobile




**Pictured: Flight Centre Intranet Mobile Homepage.** The mobile homepage features include social, documents, apps and tools, news and insights, videos, and photos.

## Homepage, Mobile Highlights

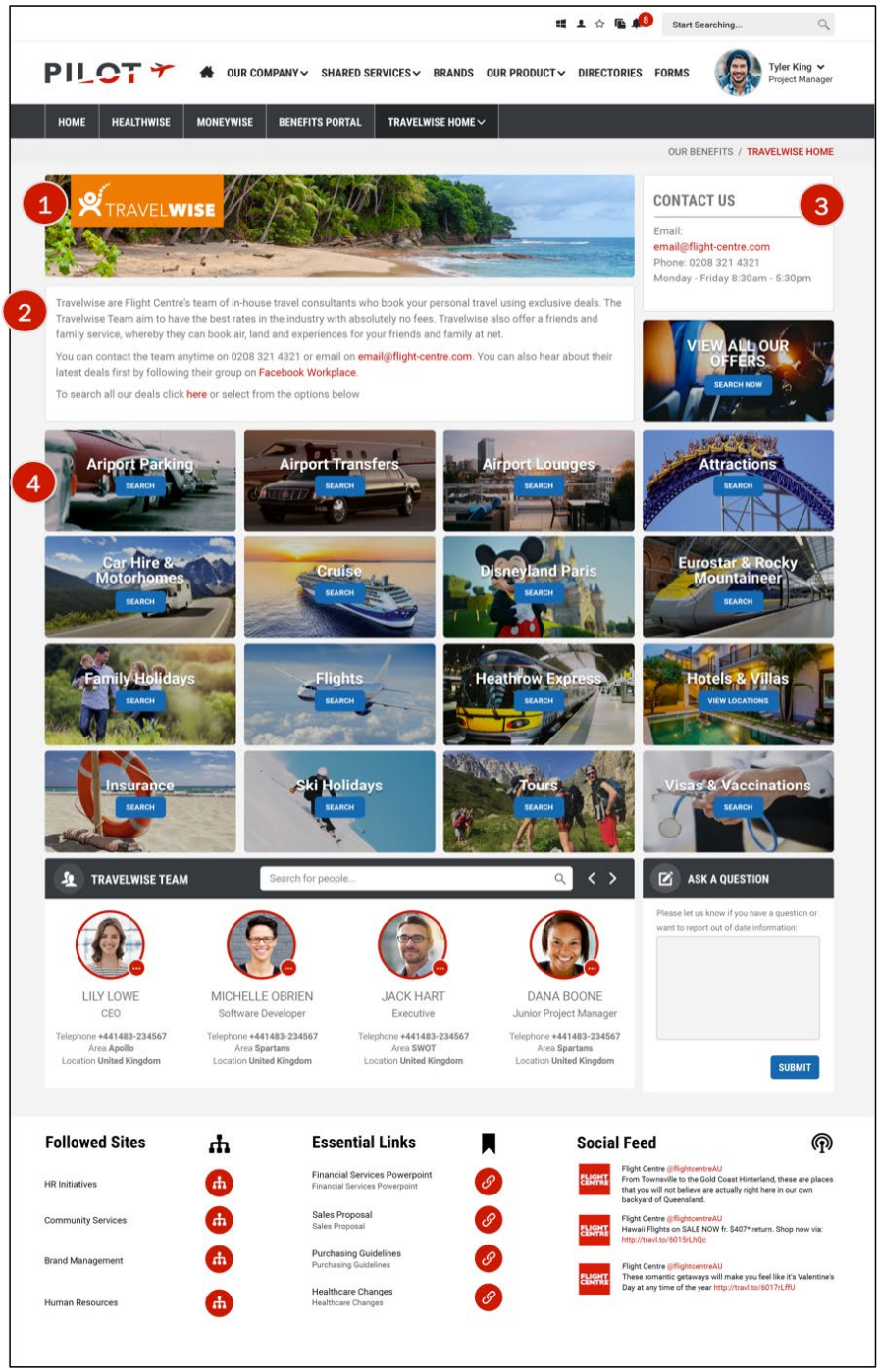
Mobile access was clearly important to the PILOT design team, and the intranet works well when accessed on mobile devices. Employees in the 114 retail outlets and corporate locations across the UK especially benefit from having mobile access. While

many desktop features work on mobile, some are not available because the mobile content set has been specifically selected from all available desktop content. On the flip side, some content that is not exposed on the desktop homepage is exposed on the mobile homepage.

Further, to create the best possible mobile UX, the position of the features on mobile is different than on the desktop. In the CMS, content managers can select which content and functionality should be on mobile. Also, employees have the option to download the mobile version as a native app for iOS and Android. The mobile app is designed for traveling consultants; it targets information accordingly and is easy to navigate.

1. **Navigation:** On mobile, the utility navigation is pared down and displayed on the same horizontal line with the global navigation menu. The global navigation is collapsed in a hamburger menu, the logo appears in the center, and a search icon and favorite icon are the only utility navigation items.
2. **News:** As on desktop, the mobile homepage displays four news items near the top of the screen. Their layout—width and text placement—is altered to fit the mobile screen.
3. **Videos:** The *Video* section displays more videos on the mobile homepage than the desktop homepage, as the team felt that employees are more likely to watch videos when they are on the go.
4. **User tasks:** The *My Tasks* section appears on the mobile homepage but not on the desktop one. This section lists the logged-in user's to-do items, along with each one's title, status, and due date. Exposing these on the mobile home screen helps employees stay on top of their work.

## Employee Benefits




**Pictured: Flight Centre Intranet Employee Benefits.** This screen shows how Flight Centre showcases a beloved employee perk—discounted travel—on its intranet.

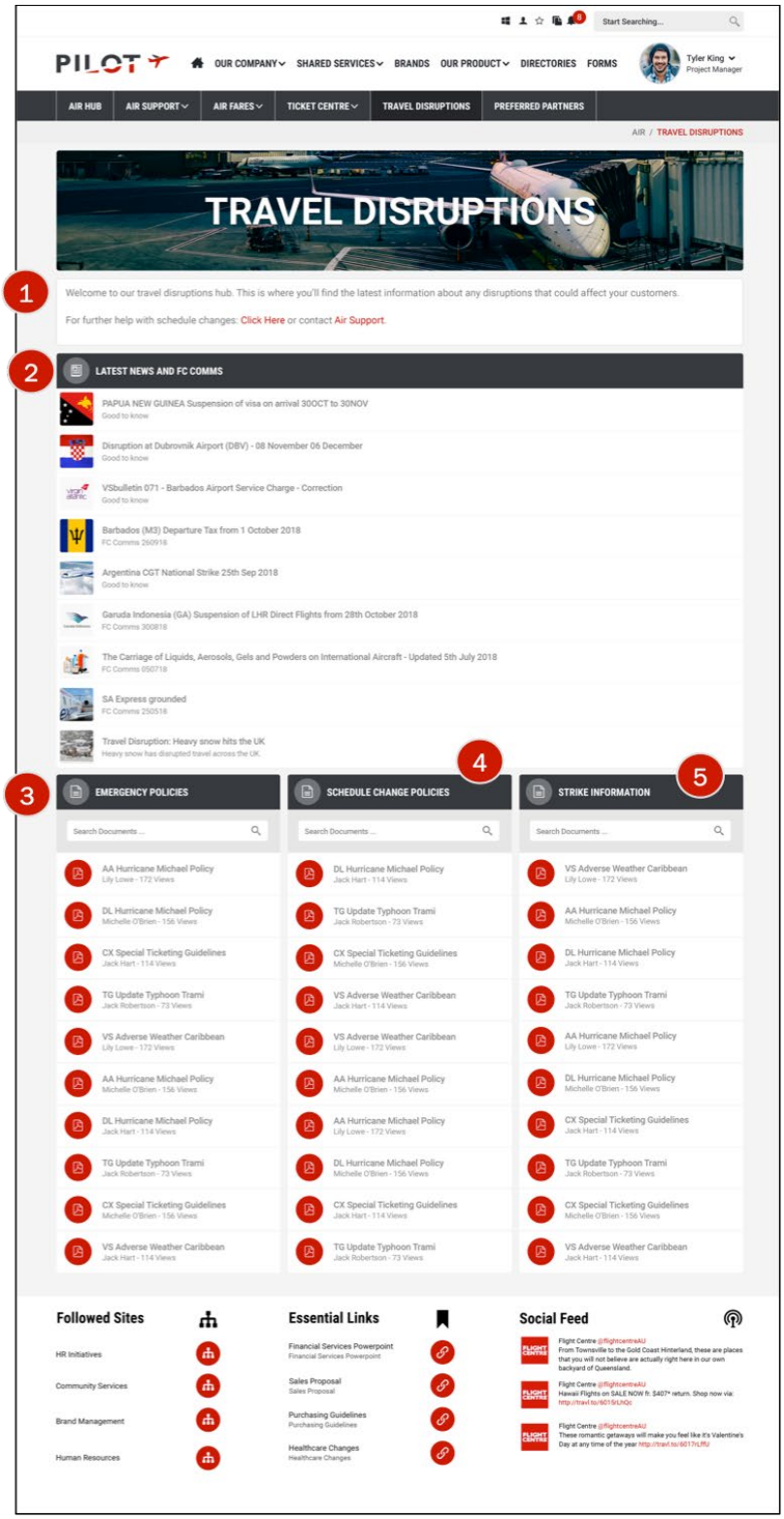
## Employee Benefit, Highlights

A treasured perk for Flight Centre employees is discounts on travel and vacation packages. Because the intranet team knew that accessing benefits and perks on the

intranet is always popular, it created the *Travelwise* feature. This feature offers easy access to discounted travel and, as predicted, it is a huge success and has resulted in record-breaking employee purchases—as well as an upsurge in intranet engagement.

Airlines around the world give Flight Centre product teams the latest information. This is fed to the Travelwise team, which uploads the information to the intranet. This information also syncs to other business applications, such as Facebook Workplace. This ensures fast delivery of accurate information to employees.

1. **Hero:** The section title appears on an image that would make most people want to go on vacation: an empty beach scene with blue water, green trees, and gentle waves.
2. **Description:** The description communicates that employees get the best rates here, and that they can book travel for friends and family as well. A phone number, email address, and Facebook link round out the information.
3. **Contacts:** Email address, phone number, and hours appear in the upper right.
4. **Search cards:** Cards on the page offer various travel types and categories, including *Cruise, Airport Parking, Flights, Tours, Insurance,* and *Visas & Vaccines*. No wonder employees love this benefit—it offers everything a person could want and it's easily to find on the intranet. Clicking any of the buttons leads users through sets of questions to help them home in on their best travel deal. For example, users looking for flights to Budapest click on the blue button in the *Flights* section, which presents them with countries. Once they select the country, they are presented a results page with the *flight* and *Hungary* filters applied.




## Travel Disruptions

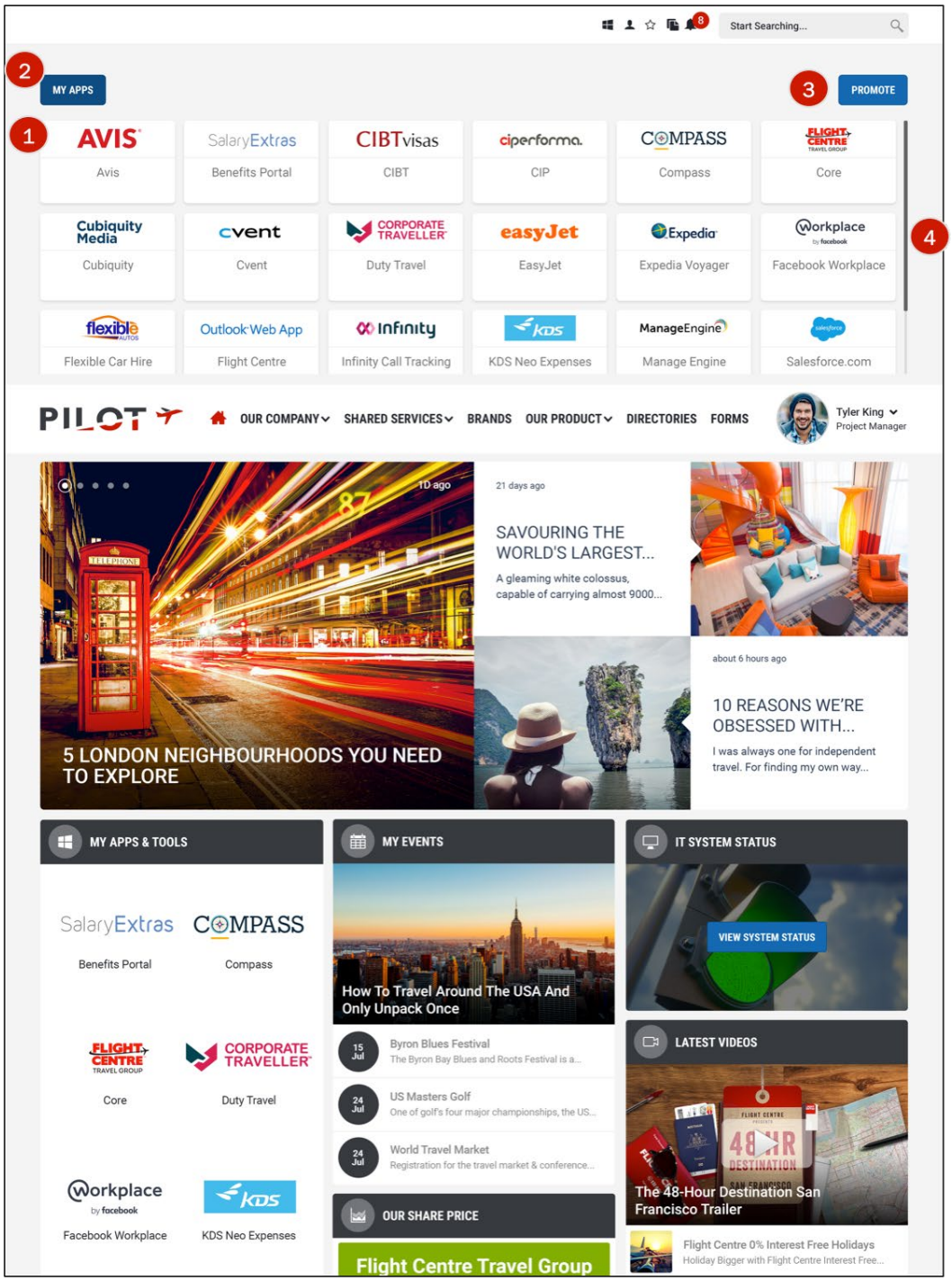
**Pictured: Flight Centre Intranet Travel Disruptions.** This section informs employees about events that could impact customer travel plans.

## Travel Disruptions, Highlights

It's imperative that customer-facing employees are aware of anything that might affect their clients' travel. Although the company's customer support sites also have the latest information on travel disruptions, employees can find this information on the *Travel Disruptions* page.

1. **Summary:** The top of the page displays the title, along with an image of an airport worker directing a plane. The image is interesting and gets the point across, without being too sensational. A short welcome message confirms that employees should look here for the latest travel disruption information.
2. **News:** A few news items about travel disruptions—such as those related to an airline, airport, or new TSA policy—appear in *The Latest News* section.
3. **Emergency-related travel disruptions:** This is the first of three columns of information about current disruptions. Emergencies such as inclement weather or equipment malfunctions appear in the *Emergency Policies* area. Users can also search for these.
4. **Disruptions related to schedule changes:** Schedule and route changes appear in the *Schedule Change Policies* section.
5. **Strike-related travel disruptions:** Many jobs in the air travel industry are unionized and employees sometimes go on strike. These events are communicated in the *Strike Information* column.

## Applications



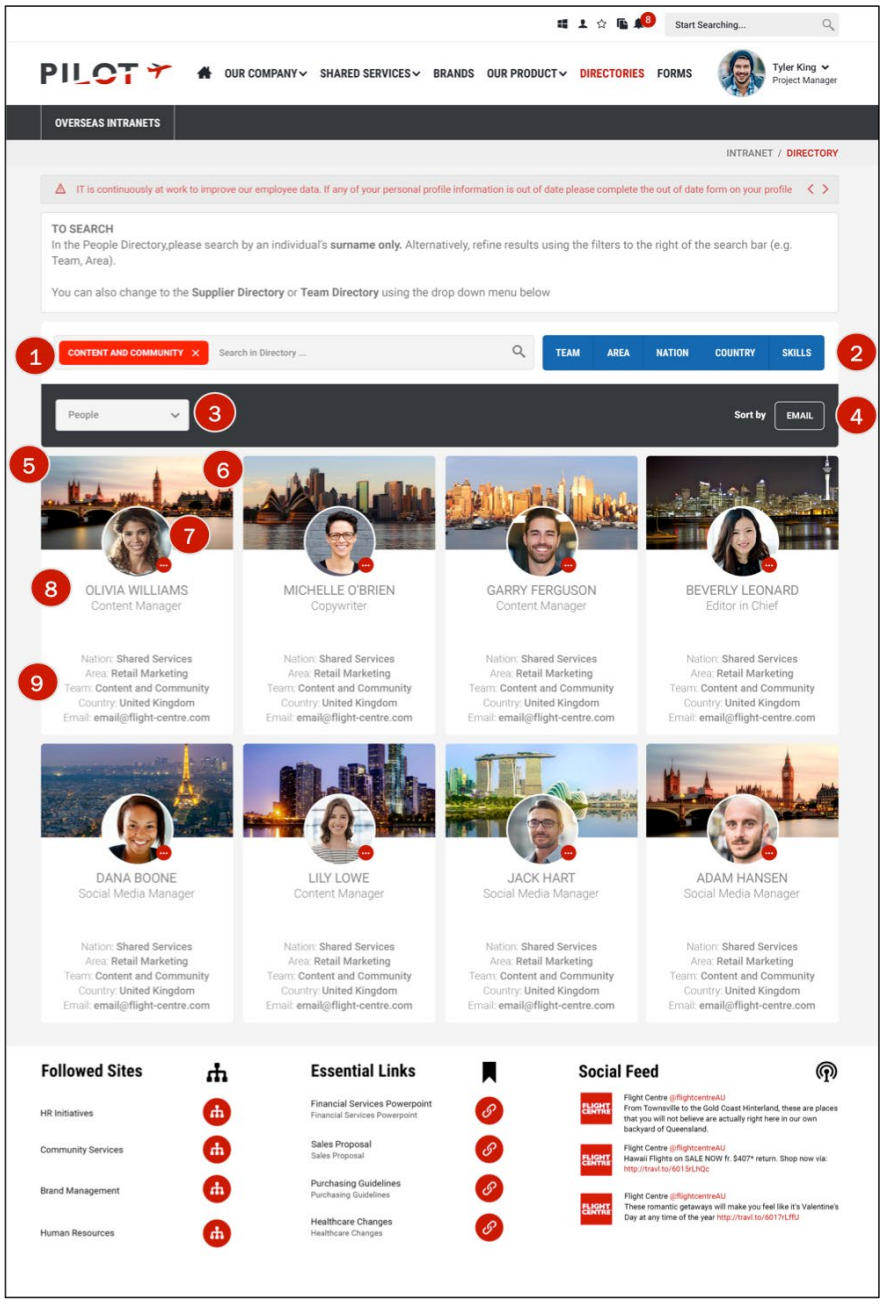

**Pictured: Flight Centre Intranet Applications.** The applications and tools menu acts as an entryway to Flight Center's whole digital workplace.

## Applications, Highlights

All company applications and tools are accessible via PILOT. Employees can get to these either via their homepage applications section or the small icon on the far left in the utility navigation. (The intranet team can also add apps in the *Essential Links* section in the footer.) Clicking that small icon opens a large scrolling menu of apps. Users see only applications they have access to, which keeps the menu from becoming unnecessarily unwieldy.

1. **Applications:** The menu displays a set of buttons leading to several applications. The application's name and logo appear on each button.
2. ***My Apps*:** When a user clicks the blue *My Apps* heading, it shows a page of all the user's applications, as they are security controlled.
3. **Promote:** Users can change the application order by clicking the blue *Promote* button. This lets users promote any of their apps to the global homepage for even quicker access. Once promoted to the homepage, apps appear in alphabetical order.
4. **Scrollbar:** The scrollbar position indicates that there are more applications to see.

## Employee Directory




**Pictured: Flight Centre Intranet Employee Directory.** The employee search offers many filtering and sorting capabilities. The employee results provide plenty of information to help people move forward.

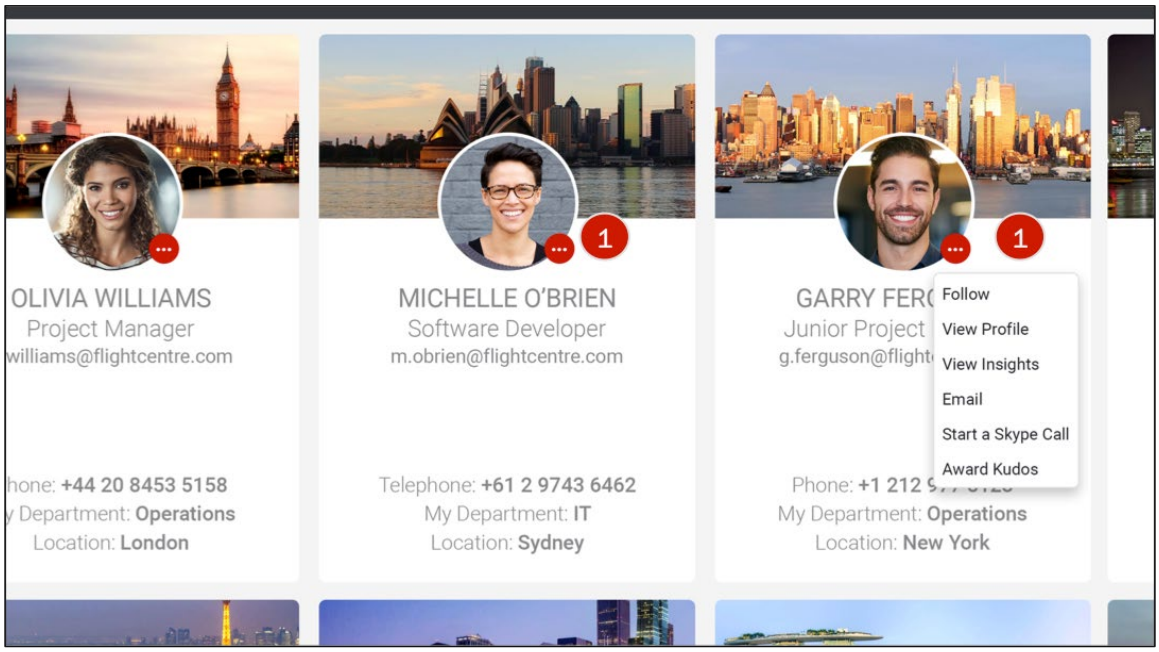
## Employee Directory, Highlights

Employee search, accessible from the utility navigation, is a wonderful way to help employees find and connect with one another. On PILOT, the capabilities make it easy for the company's 2,000 global employees across 12 different travel sub-brands and support service areas to find and get in touch with one another. Search, sort, and filtering features help ensure that the right colleagues appear in the results.

Also, as the user types, the search utilizes predictive responses and displays suggest search queries.

1. **Search:** The search field at the top of the page lets users search by name to find coworkers.
2. **Keywords:** To the right of the search field, five buttons—*Team*, *Area*, *Nation*, *Country*, *Skills*—act as drop-downs for keywords related to each topic. The user can use these to search by the suggested criteria.
3. **Filter:** In the black horizontal bar below the search field are sorting and filtering features to help users manage the results. This filter switches between a directory of employees, suppliers, and teams within the business. Each one has contact cards (like the people one above it), but with content pertinent to that directory type. For example, the supplier directory displays supplier name and status (such as gold), and each supplier and team also has its own landing page. A drop-down menu on the left lets users filter by elements such as *people* or *locations*. With this, they can see only the kind of results they are interested in.
4. **Sort:** On the right side of that same horizontal black bar is the *Sort by* option. This lets users manipulate the search results and change their order by sorting them by a particular criterion, such as name or email address.
5. **Cards:** The information for each employee that appears in the results is in a card. These cards contain enough information to accommodate many users' needs, so they don't need to open a profile document.
6. **Location image:** A nice visual, information-rich touch comes in the form of the card background image: a fetching photo of the city skyline of each user's location. Details like this are part of what makes PILOT a winning design.
7. **Photo:** Each card display's a clear, close-up photo of the employee.
8. **Name and job title:** Next to the photo, in large all-cap letters, are the person's name and job title.
9. **More information:** Users don't need to look far to find the person's phone number, department, email, and location at the bottom of the card.

## One-Click Skype in Employee Directory



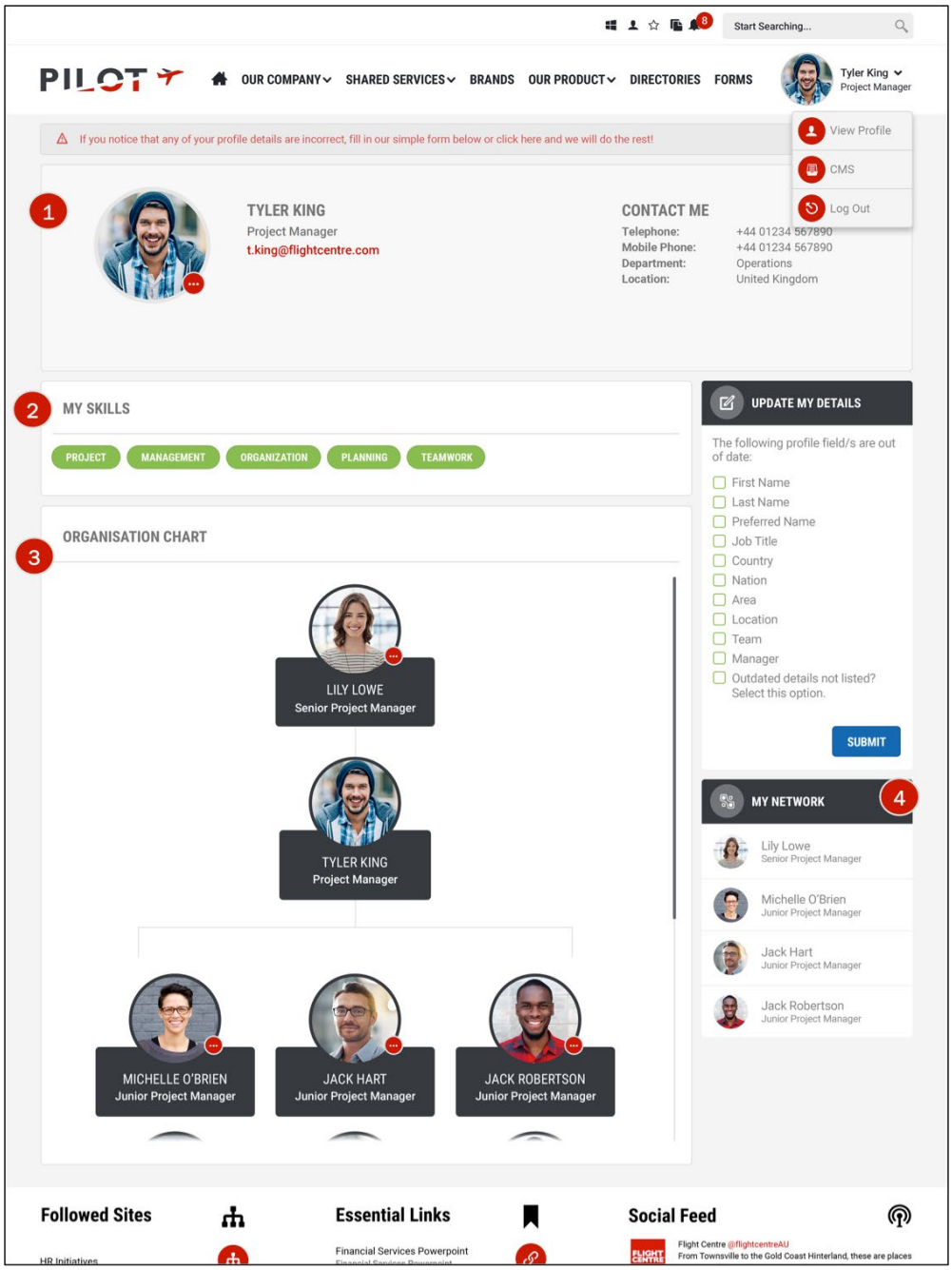

**Pictured: Flight Centre Intranet One-Click Skype.** Skype for Business integration allows employees to initiate a Skype call right from the employee search results page.

## One-Click Skype Highlights

The PILOT team integrated Skype for Business into the employee directory, knowing that it would accelerate communication between coworkers. Employees make use of its features, including instant messaging and one-click calling.

1. **Menu:** Clicking the small red dot icon on the employee's photo opens a context menu from which users can initiate a Skype call. This eliminates having to find the person in Skype—a nice time saver. From this menu, users can also do various other tasks, such as email or follow people and see articles/insights they have written. Finally, *Award Kudos* lets employees recognize one another for a job well done.

## Employee Profile




**Pictured: Flight Centre Intranet Employee Profile.** The employee profile shows detailed information about employees, including: *About me*, social information, insights they have authored, social activity, and a tree structure of where they fit within the organization.

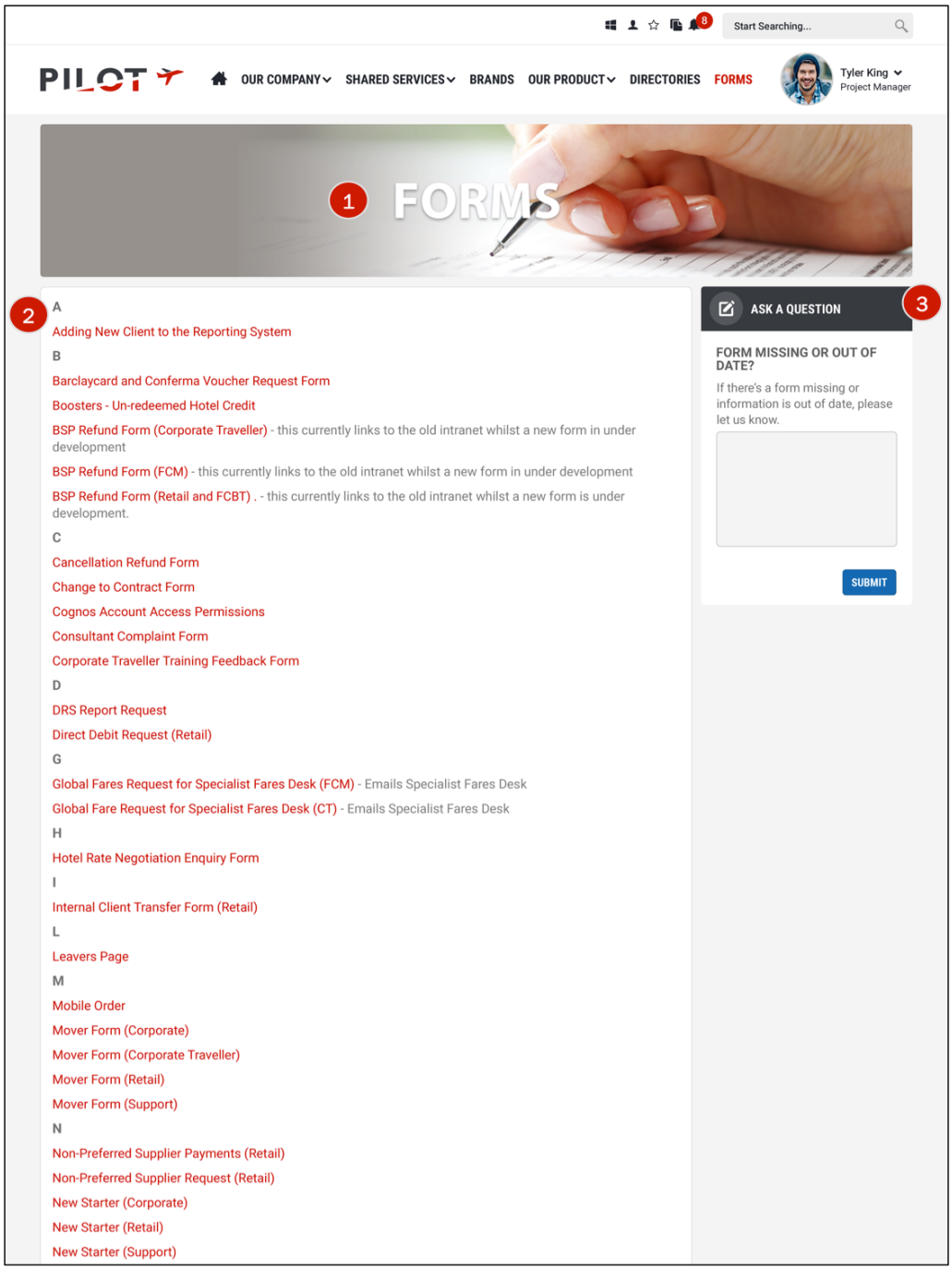
## Employee Profile, Highlights

The PILOT employee profile design is brimming with information about employees and ways to contact them. Seeing a person's topics of interest and connections helps employees find other interesting content and people.

Users can edit some sections of their profile, including their skills, summary statement, and languages they speak. Other sections are automatically filled in. Profiles sync data with an employee database (Azure AD) to ensure consistency.

1. **Summary and contact:** The employee's photo, name, job title, and email address appear first in the profile document, as this is the main information many users want to know. To the right are the person's landline telephone number, mobile number, department, and location. But that's not all. In this same grey-backgrounded introduction section, users can also access (via the small red circle icon) a menu with various options including initiating a Skype call and emailing. Clicking the blue *Connect* button adds the person to the user's list of connections (which appear in the lower right of the employee profile document). Finally, black icons lead to the employee's LinkedIn profile, Twitter feed, and Skype. So many helpful morsels, and this is just the top section.
2. **Skills:** Users also choose the skills that appear in the *My Skills* section, which provides important insights into employees as a resource for others at Flight Centre. Users looking for help, for example, can search by skills to find the right colleague for the job.
3. **Organization chart:** An organization chart, zooming in on the employee's team, gives a sense of the person's location in the Flight Centre organization.
4. **People:** The *My Network* section lists coworkers that the person is connected with. Like the other items in the right rail, this gives more insight into the employee and also may suggest valuable contacts.

## Forms Library




**Pictured: Flight Centre Intranet Forms Library.** The Flight Centre intranet consolidates all forms on one page, arranged in an alphabetical list.

## Forms Library, Highlights

The forms library houses all forms on the Flight Centre intranet. Putting these all in one place eliminates the need to hunt for forms. Employees can access the library via the global navigation, so no matter where they are on the intranet it is readily available.

1. **Page title:** The page title, *Forms,* confirms to users that they are on the *Forms* page.
2. **List:** Forms are listed in alphabetical order. Each letter of the alphabet acts as a section heading.
3. **Page feedback:** The *Ask a* Question mini-form in the right rail appears on many pages on PILOT. Using it, employees can note when content is inaccurate or needs an update. The instruction is welcoming, letting users know they can ask a question or report out-of-date information. The intranet administrator and page owner both receive an automated email notification about all such comments.

## New Hires Form

Start Searching...

PILOT

OUR COMPANY SHARED SERVICES BRANDS OUR PRODUCT DIRECTORIES FORMS

Tyler King
Project Manager

Back New Starter Form (Corporate)

1 NEW STARTER FORM (CORPORATE)

Managers: Please complete this form before your new starter begins employment.

2 New starter forms must be completed at least four days before your new starter begins to ensure Technology and Peopleworks Support create your employees details in time.

4 The first name of your new starter: *

The surname of your new starter: *

3 The email address of your new starter: *

The job title of your new starter (please double-check spelling as this will impact your employee's profile). *

Job Grade (Area Manager / Team Manager / Assistant Manager etc.)

Nation (Brand or Support Division): *

- ☐ cievents
- ☐ Corporate Traveller
- ☐ FCM Travel Solutions

Contract Type

- ☐ Fixed Term
- ☐ Contractor
- ☐ Permanent

The new starter's team e.g. Vauxhall 2 *

5 Important: Team Number (T3) *

To find your team's T3, please click on CORE (GLOBAL DIRECTORY) in the essential links footer at the bottom of this page. Search for your name, click on the employment history tab, and your T3 will be in brackets after your current job title.

Main Amadeus Office ID

Please write N/A if not applicable

Additional Amadeus Office ID

Please write N/A if not applicable

CT/FCM ProTA S Office Number

Date logins are required (i.e. new starters first day of employment)

Choose Choose Choose

Team Leader's Email Address *

**Pictured: Flight Centre Intranet New Hire Forms.** The new hires form makes it a snap for managers to get new hires set up in Flight Center systems.

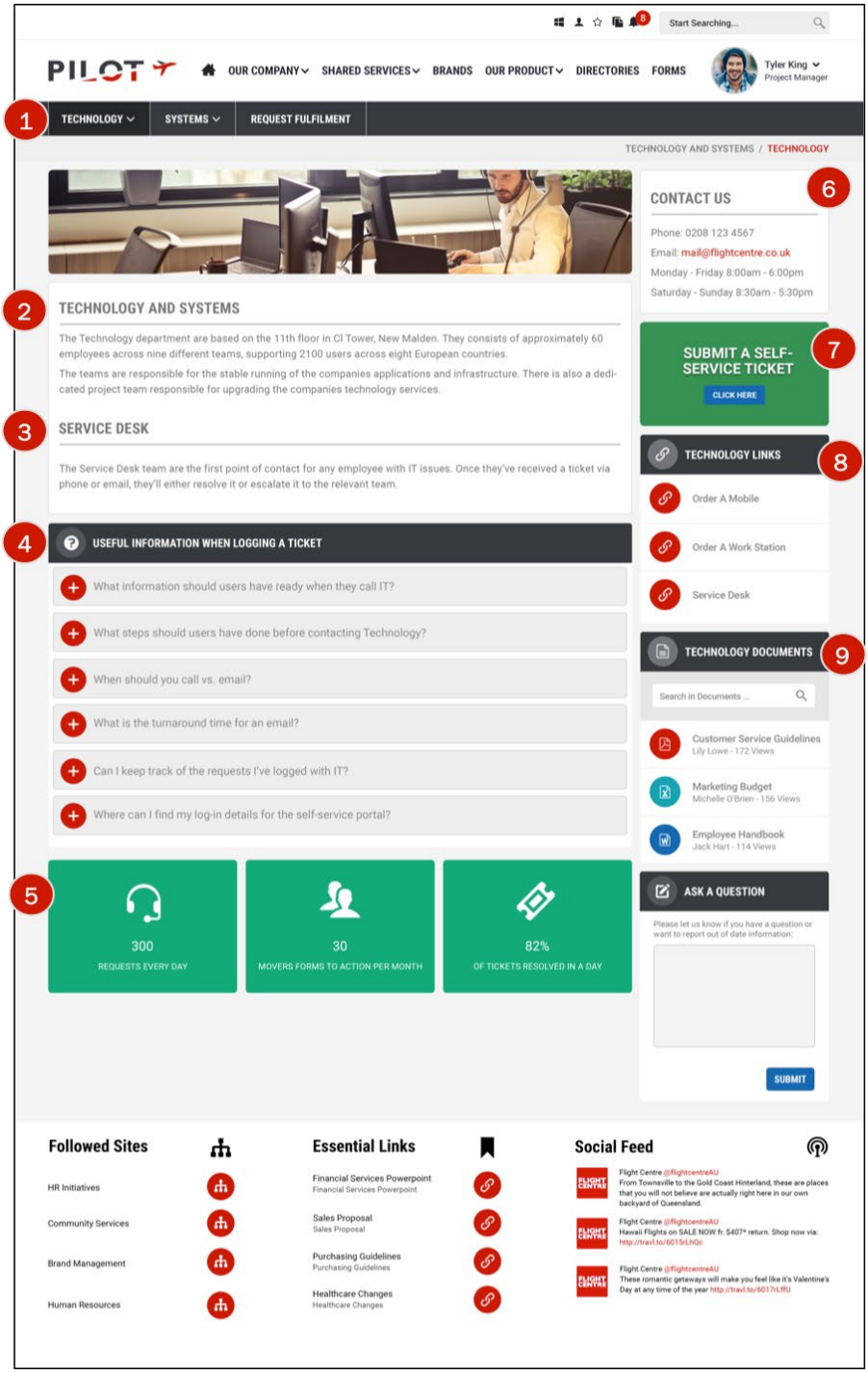
## New Hires Form, Highlights

The well-designed new hires form makes it easy for managers to ensure that new Flight Center employees will be set up to use the needed systems. A simple tool like

this helps keep managers' tasks in check, and starts new employees off on the right footing.

1. **Title:** The large title confirms that users are on the *New Starter Form* page.
2. **Instructions:** Large text below the title offers basic instructions about who should fill in the form, why, and when. Smaller text with more details appears below the larger text.
3. **Field label spacing:** Field labels appear just above the associated field, making them easy to scan and use. In this design, the team thwarted a common usability issue with labels above fields—that is, that users cannot tell if the label is associated with the field above or below it. This excellent design shows the simple solution that's not always easy to implement: provide the appropriate amount of vertical spacing between the label and its field. Also, provide enough (and more) vertical spacing between the field and the label below it that's related to the next field. This design nails it.
4. **Field label content:** The labels are detailed yet not overwhelming. For example, *The first name of your new starter* reminds managers that they are filling in the form about someone else, not themselves.
5. **Assistance text:** Some of the more complicated or lesser-known processes have an explanation between the label and the field. These prompts help ensure that users are answering everything accurately.

## IT Department




**Pictured: Flight Centre Intranet IT Department.** Employees can self-diagnose issues, create service request, and much more in the intranet's IT section.

## IT Department, Highlights

The Technology Department at Flight Centre offers a comprehensive *Technology* section on the intranet. Pages include everything from policies and guidelines to creating service requests. Also, a services page shows the status of all IT managed systems across the organization. At a glance, users can identify if a technology they want to use is having issues, click to get more information, and receive real-time updates. The addition of this page on PILOT has reduced email overload exponentially, as the previous intranet required IT to email service updates to the entire organization every 15 minutes.

1. **Menu:** The IT section includes several pages, so it offers its own navigation menu at the top. This makes it easy for internal clients to traverse the IT-related content.
2. **Introduction:** The page's top section, *Technology and Systems,* describes which tasks the department is responsible for, how many people work for IT, and where they are located. This helps employees understand more about the group and how IT can be of service.
3. **Service:** The *Service Desk* section describes how IT acts as a funnel, routing issues to the right people and teams.
4. **Ticket help:** To assist employees in creating an IT service request, also known as a *ticket,* the page provides an FAQ with six common questions. Each can be expanded (with a red plus icon) to show the answers. Following the instructions in this list ensures that employees get their issues reported thoroughly and solved quickly so they can get back to doing productive work.
5. **Department statistics:** Briefing employees about the amount of work a department does can be interesting, and it demonstrates a hard-working team's results. Statistics such as *300 requests every day* can also create empathy in employees who might otherwise expect their service request to be addressed immediately.
6. **Contact:** The phone number, email address, and hours of operation show that IT is approachable and willing to provide one-on-one assistance.
7. **Service request:** The *Submit a Self-Service Ticket* section appears above the fold, as it is a regularly used feature.
8. **Links:** Links related to common technology needs, such as ordering a phone or computer, appear in the right rail.
9. **Documents:** IT-related documents are consolidated for employees in the *Technology Documents* section.

## Brand Page

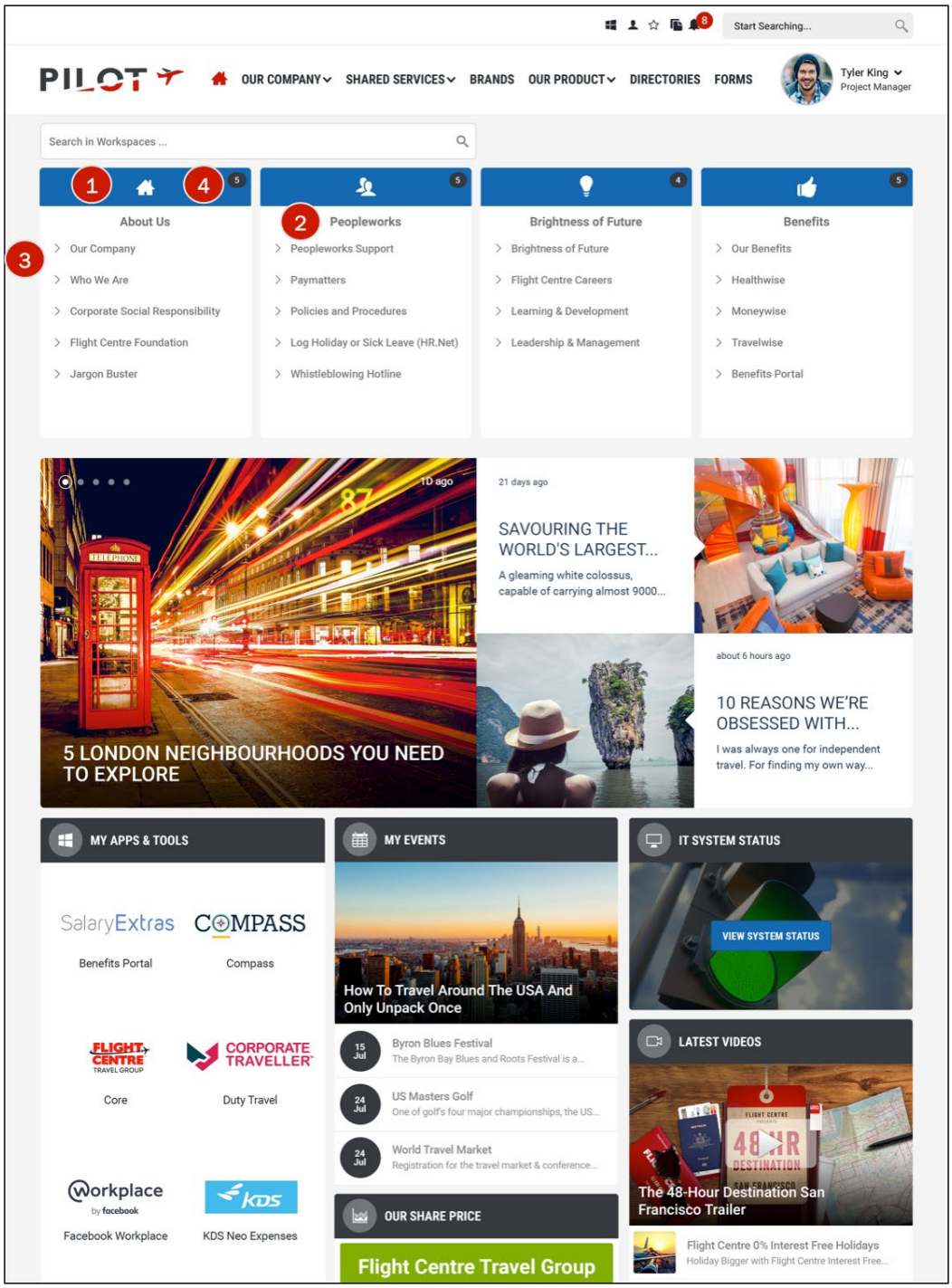
**Pictured: Flight Centre Intranet Brand Page.** Each of the 40 Flight Centre travel brands has an intranet page that describes the team, what they do, and more.

## Brand Page, Highlights

There are seven brands within the UK. Each one has a page on PILOT that describes the brand and its team, presents internal and external brand events, coordinates discussions around hot topics, and tracks the brand's KPIs.

1. **Summary:** The page's top section includes the page title, followed by a detailed description of how many people work for the brand, what the brand does, and why it's special. This description is a great way for employees to learn about each of the seven brands.
2. **How the team works:** The *How We Do This* section provides an overview of the brand's core Customer Value Propositions and shows how the team will achieve those targets. Topics about technology, service, expertise, and promise can each be expanded to reveal the related information. Sharing this can help the brand teams learn from one another and develop new ideas for how to improve their own brands.
3. **Team:** A subset of employees, along with their photo and contact information, appears across the width of the page. Employees can use the search field to look for a person working on the brand.
4. **KPIs:** The brands reveal some of their KPIs in cards in the *Key Facts* section. These figures can help keep a brand's team members on track and motivate them to reach shared goals.
5. **Calendar:** The calendar indicates brand-related events with a white dot on event dates. Clicking the date opens a page with event details and allows users to click to add the event to their Outlook calendar.
6. **Documents:** A list of four brand-related documents shows on the page, and the search feature enables users to find others.
7. **Links:** The brand suggests a list of useful websites for their colleagues to consult.

## Global Navigation




**Pictured: Flight Centre Intranet Global Navigation.** The global navigation links are easy to scan in the menu.

## Global Navigation, Highlights

An unconventional global navigation approach gathers content and sites into collections. Each link appears under the appropriate global navigation area. This is

loaded manually based on the information users are likely looking for. The site uses analytics on the back end to end to justify these selections.

1. **Section:** The open menu offers sections, each indicated with a blue bar at the top and light grey shading around the remaining three sides. Similar terms are put together to make up each section. Icons at the top attempt to differentiate the sections and make them quickly recognizable.
2. **Title:** Each section title is in bold grey text—dark enough to read, without appearing too heavy.
3. **Links:** Links appear in columns. The short lists are easy for users to read.
4. **New:** The number of links that appear in each section is automatically counted and displayed within the black circle in the top blue section. When searching within this menu, it filters all the columns in real time so that users can quickly refine it to just a few links by typing a few letters.

## DESIGN PROCESS AND USABILITY WORK

The design team conducted various research activities to inform the new intranet's design direction:

- **Surveys and workshops:** For Flight Centre's Internal Communications team, the new site's design was of paramount importance. The company therefore conducted employee surveys and workshops that let the design team gauge the interests, goals, and objectives of end users. One of the questions was: *What ways can an intranet make your working life easier?* The responses suggested improvements to content, design, productivity savings, timeliness, and content accessibility. These findings were largely focused on the need to better organize information on the intranet in order to bolster staff members' ability to work together and collaborate. One particular comment on navigation and design served to influence the new structure: *"I don't think it has to be over complicated. It should be easy to find the department you are looking for. The current issue is that there is a mismatch of information scattered all over the place."*

  The workshops allowed Flight Centre staff members to talk through concerns about the existing intranet and prioritize areas they found most useful. Site maps were then created to illustrate a structure that would surface important information.

- **Focus groups:** Improving the UX was also an important part of the intranet redesign. The survey results played a huge part in helping to identify what users found important from a UX perspective. The intranet team carried out several focus groups with intranet champions from different areas of the business including Internal Communications, front-line sales, finance, support teams, operations, and leadership to ensure all requirements had been captured and were reflected in the site structure. Among the requirements surfaced were two key needs—the need to have personalized apps and tools available on the homepage, and the need to make forms accessible through the top-level navigation. Also, to ensure consistency and quality, templating was crucial. The design team developed a brand page template in conjunction with brand leaders and others. This gave these leaders a clear understanding of the content they needed to gather and maintain, and also ensured that users would have a seamless experience from one brand to the next.

  Focus group participants also discussed the previous site and how it overwhelmed employees with extremely busy navigation and many buried pages. Further, the site had low-performing search capabilities, and users didn't trust the content's integrity as documents were often outdated. The new site completely overhauled all of these elements—offering streamlined navigation, powerful global search capabilities, and the ability to work collaboratively, with real-time editing on the same documents (permission trimmed), including information on who edited the document last and when.

- **Card sorting:** Core IA was established through card-sorting activities, in which design team members had users build an IA that they thought best represented the business and how they would look for information. The team merged these findings into a final IA that kept important information in sight and aligned it to the business structure.
- **Site audit:** The design team also audited the current site to understand which pages and assets were being used, as well as what was important to migrate and give prominence in the new IA.

### Buy-In

Buy-in for the new Flight Centre intranet was easy to achieve as the previous intranet had outdated content and poor performance. Users were eager to move on to a new and improved platform, particularly with the new site's emphasis on providing up-to-date and relevant content.

People can now find the latest travel information—including information about disruptions, deals, and business strategy announcements—all in once place. Most importantly, the information they find on the intranet is considered the source of truth, as it is not available elsewhere; business critical information is no longer being communicated via email.

### Working with Outside Agencies

Unily is responsible for the intranet's operations, support, and ongoing development. The Unily Consulting and Customer Success teams ensure Flight Centre is able to use the latest product features, provide support for page building, and contribute to the platform's ongoing success and adoption.

## GOVERNANCE

| INTRANET TEAM RESPONSIBILITIES | |
|---|---|
| **Role** | **Responsibilities** |
| **Internal Communications Team** | • Manage the intranet, govern the platform, and train content creators and platform super users |
| **Content Creators** | • Create content, build pages, and ensure content is up-to-date on their own department and regional pages |

## URL AND ACCESS

| ACCESS INFORMATION | |
|---|---|
| **Item** | **Status** |
| **URL** | intranet.flightcentre.co.uk |
| **Default Status** | The intranet homepage is enforced on Flight Centre's preferred browser, Internet Explorer |

## TIMELINE

| PROJECT MILESTONES | |
|---|---|
| **Milestone Date** | **Milestone Description** |
| **2002** | • First intranet (designed by IT) launched |
| **April 2017** | • Recent engagement with Unily began |
| **2018** | • New intranet launched<br>• Six-month post-launch survey conducted |

## CONTENT AND CONTENT CONTRIBUTORS

| CONTENT DEVELOPMENT AND OVERSIGHT | |
|---|---|
| **Contributors** | The Internal Communications team has empowered up to 20 different content managers from across the organization to contribute content in their areas of expertise.<br><br>For example, IT personnel have ownership of the IT page, which allows them to update information quickly without needing Internal Communications approval. Because IT team members are SMEs, it makes sense to give them ownership to share business-critical information that is important for the wider organization. |
| **Contribution** | Two Internal Communications managers and approximately 20 other content contributors provide content across the site.<br><br>Other employees can offer feedback on content to ensure it stays up-to-date by posting to a dedicated forum, submitting a form, or contacting the Internal Communications team directly.<br><br>News stories and articles can also be submitted for approval. |
| **Training** | • Unily consultants conducted training sessions and workshops for content authors so they could learn best practices prior to contributing to the new site.<br>• The Internal Communications team provides ongoing support and training on topics including content creation, page creation, layouts, and best practices.<br>• Guidelines are provided to encourage a consistent tone of voice (informal) to ensure that content is easily communicated without jargon. |

| | |
|---|---|
| **Maintaining Quality** | The biggest challenge on the Flight Centre intranet is to ensure information is kept up-to-date. Flight Centre has overcome this challenge by giving employees a forum on the platform where they can notify the Internal Communications team if they spot any out-of-date content. Forms have also been strategically placed on pages across the platform, allowing users to highlight outdated content. A completed form is automatically sent to the content author and the Intranet Manager to notify them of any suggested changes to outdated content.<br><br>Also, a content audit is carried every month to ensure that there is no missing or inaccurate information. The Internal Communications team controls the entire site, but it delegates content authoring to relevant content managers. |

## TECHNOLOGY

Flight Centre required a solution that could be easily deployed out-of-the-box, and could also be configured and tailored to its specific business needs. It therefore chose to use the Unily intranet platform hosted on Microsoft Azure. Unily's core functionality let Flight Centre implement a rich feature set very quickly and then build unique elements—such as the supplier directory—on top. The platform integrates seamlessly with O365, including SharePoint Online, Skype for Business, OneDrive for Business, Delve, and much more. The site also feeds all company applications and tools into the platform through an OKTA API integration. With OKTA, Flight Centre has a security-trimmed collection of business applications.

## ROI

The new intranet's success can be measured in quality of life gains for employees and quality of engagement for the organization as a whole. Specific wins include:

- **Reduction in email traffic:** A key success factor for the Flight Centre intranet project was to reduce email communication across the organization by 88%. Prior to the implementing the new intranet platform, email was the main source of company communication, causing an overload of email traffic that resulted in confusion and critical communications being missed.
- **Provide a single source of truth:** Not only is the site the go-to place for all company information, but it is also viewed as the place to go to receive and digest *credible* information. The Flight Centre leadership team uses the platform for all leadership communication, including to communicate changes in company strategy. In essence, it's not true until it's communicated via the intranet. This has proven to be a huge success factor for the platform.

- **Provide access to company benefits:** The site has made it easy for employees to access company benefits by offering them in a single go-to place. The *Travelwise* page offers easy access to discounted travel and vacation options available to staff; this achievement alone made the redesign worthwhile. By allowing employees to access their company benefits through the site, Flight Centre has seen a record-breaking increase in employee purchases and a huge bump in engagement with the platform.
- **Create a self-service environment:** With the previous solution, employees had to spend considerable time on the phone with support teams to complete basic tasks. The new platform is far more transactional, high-performing, and intuitive, which has greatly reduced the need for phone support and given employees the ability to serve themselves and increase their efficiency.
- **Follow a content migration principle:** The team followed a straightforward content migration principle: *If it is easier to find the information on Google, then it doesn't belong in the intranet.* This approach facilitated smart decisions about what should stay and what should go. For example, information such as baggage allowance can be found on each airline's website, so Flight Centre didn't need to copy and paste it into a page and use resources to try to keep it updated. Decisions such as this were a big cleanse for the new platform, as was the decision to cut any page without a minimum number of monthly views.

## LESSONS LEARNED

The Flight Centre design team learned many valuable lessons through this project, and it shares some of those lessons here:

- **Find champions.** "Identify your intranet champions from across the organization and make sure they are committed from the start. Flight Centre's champions influenced the direction of the project massively."
- **Add a contingency to the project timeline.** "Timelines are estimates and things can go wrong. Plan for the possibility in advance."
- **Don't overlook the IA.** "IA is a critical component of any successful intranet. Make sure the information architecture is useful and ensure it is up-to-date. This will save a lot of time in the long run."
- **Projects don't manage themselves.** "Ensure you have a dedicated intranet manager who has a passion and drive for the project. This will help with the development of your site and will ensure your project stays on track."
- **Choose a partner with care.** "The partner you choose to work with will influence your project massively. Ensure your chosen partner is able to give you the face-to-face time the project needs. Conduct workshops, pre-launch meetings, and training sessions with expert partners and this will drive the success of your project. This was essential to the Flight Centre project."

- **Keep content lean.** "When planning an information architecture solution, only include what's necessary. If the information is easier to find on Google, it shouldn't be on the intranet."
- **Profile data is key.** "Profile data is the backbone of delivering highly relevant experiences, as what you know about your people defines what you push to them on the intranet. Make time to understand your audience. Involve IT and HR and build a process for maintaining this data going forward."

# Loblaw Companies Limited (2020)

## COMPANY

Loblaw Companies Limited is Canada's largest retailer, providing grocery, pharmacy, health and beauty, apparel, general merchandise, financial services, and wireless mobile products and services.

**Headquarters:** Brampton, Ontario, Canada

**Company locations:** The 2,500 stores across Canada are located within 10 minutes of 90% of Canadians.

**Locations where people use the intranet:** The intranet is currently used in all office locations and the company's 1,200 grocery stores, 1,700+ pharmacies, and 19 distribution centers.

**Annual revenue:** Approximately $46.69 billion CAD in 2018

## THE INTRANET

**Users:** flip was designed as the starting point for Loblaw's approximately 200,000 colleagues (those employed by Loblaw) and employees (those employed by a franchisee) across Canada. The platform offers a personalized experience, serving up the most important and relevant content and tools based on each user's division and role.

**User roles:**

**Frontline:** Nonmanagement store colleagues, such as cashiers and clerks.

**Store Management:** Store managers, assistant store managers, department managers, and store administration (bookkeepers).

**Store Support:** Colleagues in office roles that support stores; these colleagues are predominantly in shared service functions such as finance, IT, and marketing.

**Store Operations:** Regional vice presidents, district managers, and specialists responsible for a grouping of stores.

**Merchandising:** Colleagues who own the relationship with Loblaw vendors providing goods for resale in the stores. These colleagues make decisions about the products carried and ensure they are set up appropriately in Loblaw systems.

**Office:** A persona similar to the store support role, but without the need for visibility to communicate with other Loblaw stores.

**Mobile approach:** Responsive web design

**Technology platform:** SharePoint hosted on Office 365 and integrated with a custom Microsoft .NET development solution hosted within Azure

## LOBLAW TEAM

**Design team:** A team of approximately seven people designed the front end, including IA, UX and visual design. A software development team, consisting of eight developers located onshore did the back-end development and architecture. Business partners in Central Operations provided additional assistance with scheduling functionality.

**Core flip team:** Richard Windross, Senior Director, Corporate Affairs & Communication; Jennifer Ballantyne, Senior Manager, Content and Community; Julia Simmons, Senior Manager, Internal Communication; Suchita Jain, Program Manager

This team works collaboratively with other business functions, including Central Operations and HR.

## RIGHTPOINT TEAM

**Project management:** Jason Abrams, PM Director; Brad Kramer, PM Associate Director; Naveed Lakhani, PM Associate Director

**UX and design/creative services:** Tim Stahl, VP Strategy & Design; Aja Shamblee, Senior Art Director; Sarah Wallace, Associate Experience Director; Mark Drespling, Associate Experience Director; Kelly Noah, Associate Experience Director; Kareem Hindi, Senior UX Designer; Chris Niemyjski, Associate Content Director

**Development:** Jason Prell, Senior Solutions Architect; Jason Sears, Solutions Architect; Mike McDermott, Solutions Architect; Andrew Varnon, Lead Developer; Brennan Cage, Lead Developer; Liz Sdregas, Senior UI Developer; Bryan Gulley, Senior UI Developer; James Mburu, Senior BI Architect; Paul Mathai, QA Senior Analyst

**Service Desk and Support:** Sherrie Eichstaedt, Service Delivery Associate Director; Alex Swarthout, Associate Support Technician; Leo Perenzuela, Associate Support Technician

## INTRANET TEAM

**Team members shown here** (top row, left to right): Tim Stahl, Jennifer Ballantyne, Jason Prell, Aja Shamblee, and Andrew Varnon; (bottom row, left to right): Suchita Jain, Jason Abrams, Richard Windross, Julia Simmons, and Jason Sears.

## HIGHLIGHTS ABOUT THIS WINNER

In retail, customer experience (CX) and UX have long been an obvious pairing. The Loblaw Companies Limited intranet, flip, provides product and service support with

its highly personalized design. All employees—whether they are executives working on corporate strategy or customer-facing associates working a cash register in a supermarket—can find resources and trustworthy information on flip. Store-related announcements, shift hours, schedule, and product recall notices for pharmacies and stores are just some of the flip features that keep employees informed, productive, and running the retail stores meticulously.

- **Time-sensitive, accurate product information:** In-store employees use flip to stay abreast of information about the products they sell. The intranet is the de facto source that employees can trust for everything from supply information to product recalls.
- **Cultivating the customer experience:** Helping customer-facing employees create a positive customer experience is a mainstay of flip. Several features, such as *Next Shift* and *My Schedule,* help employees who interact directly with customers at pharmacies and retail stores. A Yammer feed also enables employees to discuss, in the open, any idea or issue.
- **Responsive:** A goal of the design team was to provide this mobile-first experience so that employees have the information they need, wherever they are, and at any time. This enables them to act on information immediately, and have a positive impact on customers and the business around the clock.
- **Roles based on personas:** The design team researched Loblaw employees, created personas, and used those personas effectively by basing the intranet's user roles on them. This resulted in a highly personalized experience for flip users.
- **Personalized homepage hub:** Depending on the user's division, the homepage, banner, logo, apps toolbar, and navigation all change. Content is also targeted by job role, division, and sometimes by store. These efforts tailor the flip homepage experience to the individual.
- **Flexible, simple design patterns:** Sets of well-designed cards, tiles, and banners can be switched in and out to make personalized homepages, providing the appropriate targeted content for the user.
- **Communication:** The *Message Centre* makes it easy for employees to effectively share critical and noncritical information about products and processes with employees who need it. The *Message Centre* is pushed to in-store and other employees as a replacement for static email messages. Messages are up to date and trusted, enabling employees to act in a timely and appropriate manner.

## BACKGROUND

Before flip launched, the organization had several separate intranets; the two largest were Loblaw Inside and Front Page. Loblaw Inside supported approximately 10,000 users and was difficult to search. Front Page had more than 600 content providers contributing to 24 unique subsites—one for each of the company's grocery banners (a grouping of stores under the same name and/or region)—and did not have search capabilities. Neither intranet had the ability to target content to groups of users, and both sites were built on Microsoft SharePoint 2007, which was reaching end-of-life

support. The company had also recently completed its acquisition of Shoppers Drug Mart, which had an intranet built on the Google platform.

It was time for a new intranet.

## Goals

The company had three high-level goals for this new intranet:

- Provide relevant content to colleagues in an accessible and mobile-friendly manner.
- Expand the intranet's reach beyond existing users to include more than 140,000 frontline colleagues, who previously had no access to intranet content.
- Build a sense of community among all colleagues, regardless of location or role.

## Challenges

The team faced several key challenges during the project:

- **Complex requirements for targeting and securing content:** At launch, the organization had three distinct hiring companies (with unique HR programs and policies), six operating divisions, and 25 store banners.

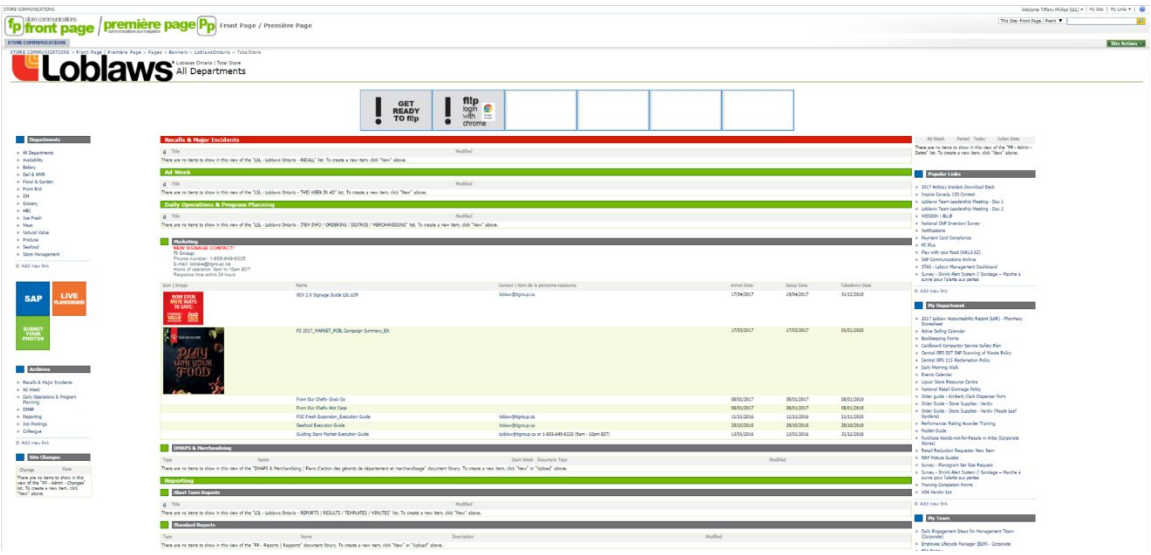
  To deliver the best experience for users, the team needed to be able to target content by division, banner, and job roles, and, in some cases, by specific stores. Further, legal requirements meant that some company areas could not see another area's content.

  The team uses a matrix to outline the organization's operating divisions, while personas created for flip show how content is targeted and which features are available for each persona.

- **Providing access to frontline (store) colleagues:** At the start of the project and at the initial launch, frontline colleagues did not have user accounts to access digital resources. Work to integrate HR systems with identity management systems focused on providing user accounts and licenses for these colleagues. But the bigger challenge was figuring out how to distribute so many account credentials to so many people across so many locations.

  This was accomplished by creating an Excel spreadsheet with each frontline colleague's first and last name, store number, and UPN (the username they need to enter the system). This list was shared with store managers via flip, along with instructions on how to filter it by store number, then print multiple copies for their store.

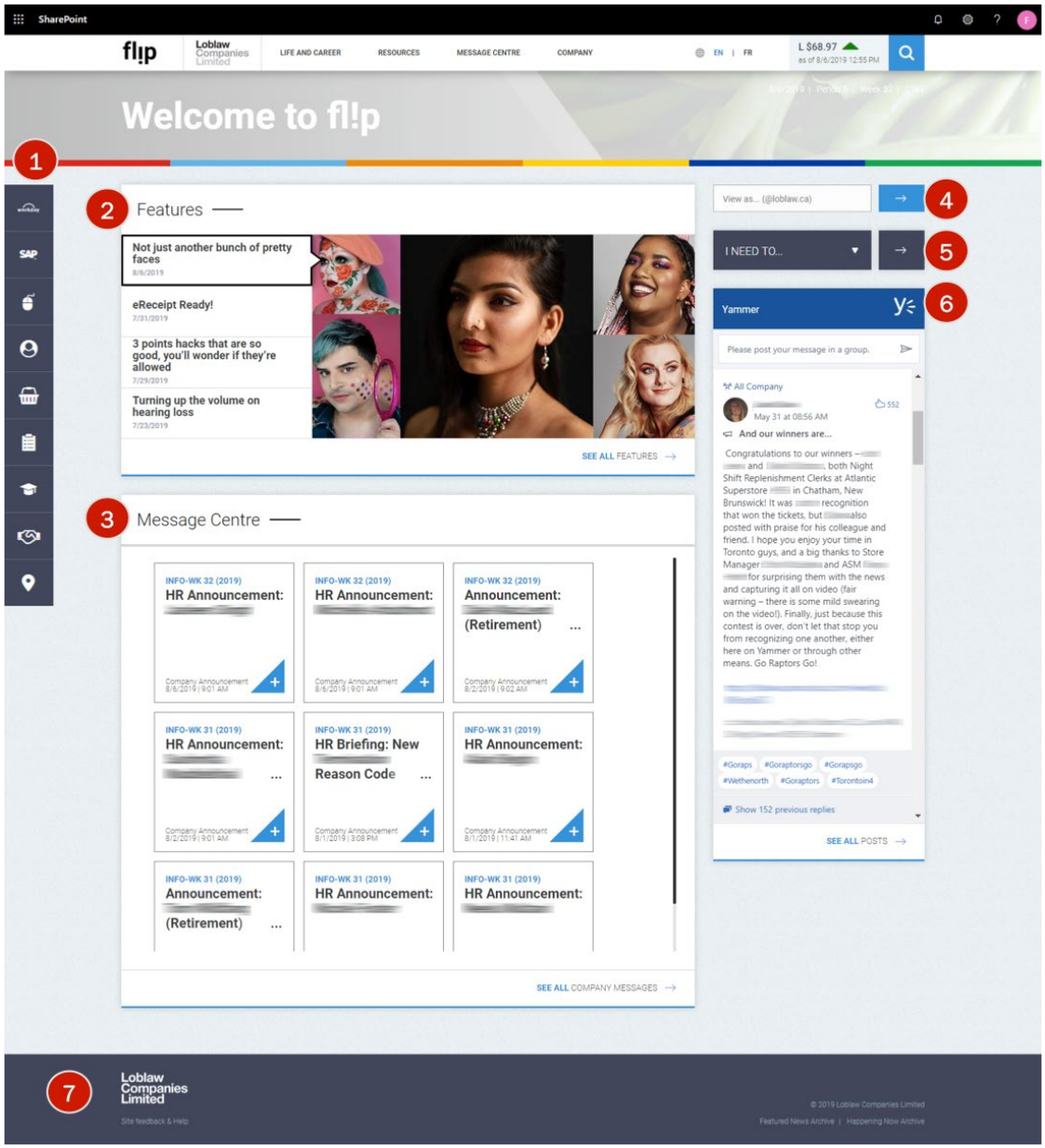
Also, temporary passwords were created for each colleague using a formula that a colleague would be familiar with. Store management attached the printed username lists in a designated location on pre-printed posters. These posters, which also advertised the temporary password formula, were then placed throughout the stores where colleagues could look up their name, note their UPN, and get the password formula. Then, when they logged in for the first time, they were prompted to create a new password.




**Pictured: Loblaw's Previous Intranet Homepage.** Front Page, the site formerly used by Loblaw stores, was created in-house by a self-taught team using out-of-the-box SharePoint 2017 features. It had little visual interest and was difficult to navigate as it had a lot of text and links and no search capability.

## DESIGN REVIEW

### Homepage Personalized for Shared Services Store Support




**Pictured: Loblaw Intranet Homepage (Shared Services Store Support).** Homepages are personalized based on the logged-in user's role. The homepage for employees in the Store Support division is one such example. It features links to apps, news, messages, and more—all targeted to the user.

## Homepage (Shared Services Store Support) Highlights

Homepages are personalized based on the logged-in user's role. The logo and various other elements are displayed depending on the user's division.

A personalized homepage for employees in the Store Support division uses the style, menu, and layout for that division, and also targets content based on user role.

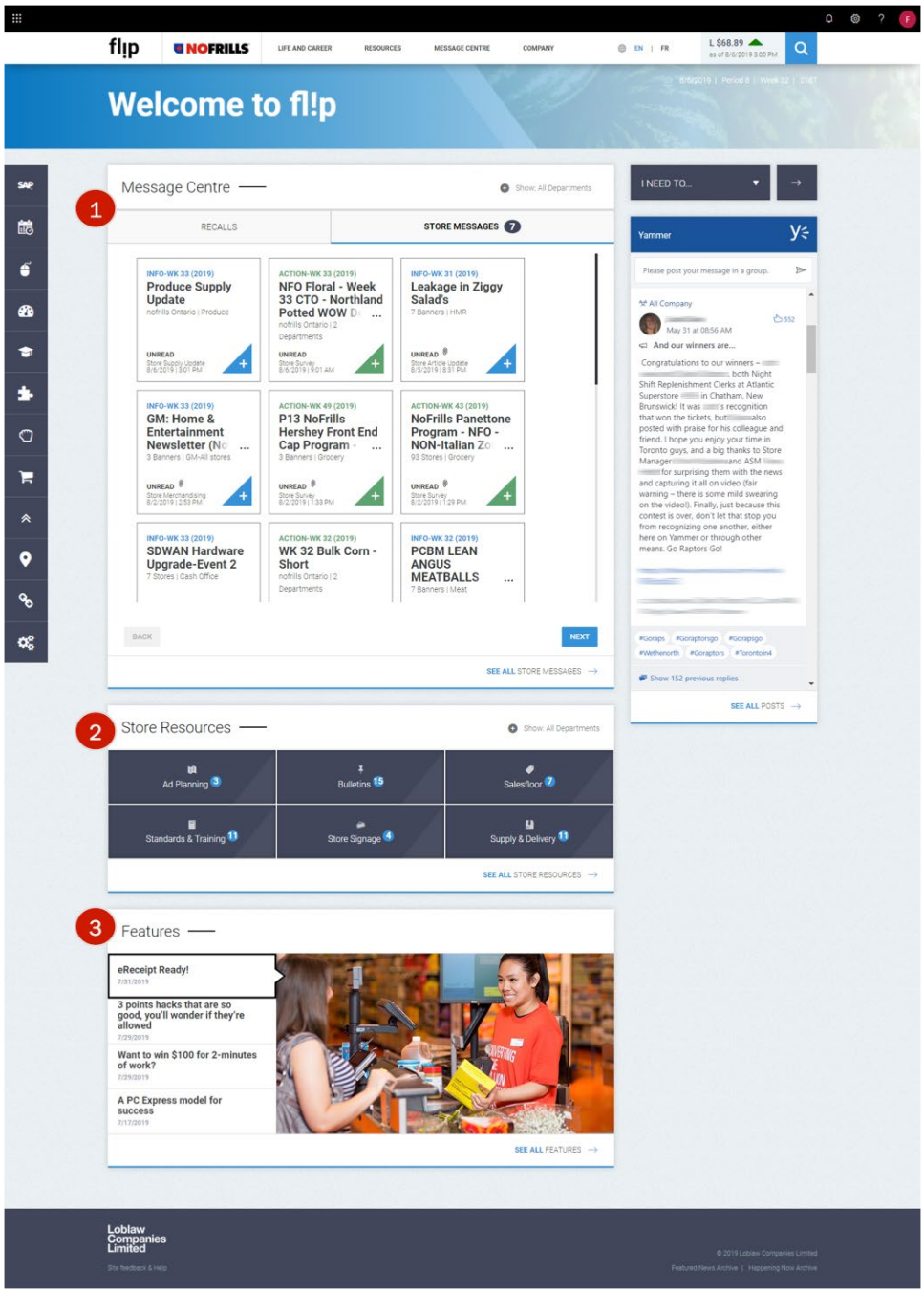
1. **Links to tools:** Employees can access various systems and tools beyond flip in the Loblaw digital workplace. The list of icons that appears vertically down the left side of the page offers quick access to tools targeted to the user's role.
2. **News:** The *Features* section at the top of the page includes news stories, each selected based on the logged-in user's role. The carousel presents a list of four items, each with the title in large, legible text, followed by the item's publication date. Story topics can include anything from a behind-the-scenes view of something the company is doing publicly to stories about the daily lives of colleagues. The *See All Features* link is easy to spot and leads to a page with more features. These feature stories help employees learn more about their business and colleagues, and can help them feel more informed and connected with one another.

   For the Store Support employees' homepage in particular, story topics span all areas of Loblaw, as these employees are likely to engage frequently with multiple other divisions.
3. **Announcements:** The *Message Centre* is in the middle of the Store Support employees' homepage, which is a good location to help ensure that employees see its posts. The section displays announcements from the previous seven days that apply to the user. Each message appears in a simple, square card packed with information such as: the type of message (Info, Action, Recall, etc.); the week it was posted; the subject and division; and whether it has been read by the user. Employees can also use the scrollbar on the right to see additional recent messages. Clicking the *See All Company Messages* link opens a page of messages. Tabs at the top filter announcements based on whether they are *Recalls* or *Store Messages*. The number of new items appears in a circle in the tab, alerting users of new announcements. When Store Support colleagues click *See All Company* messages, they are taken to the full *Message Centre* (same as if they had clicked from top nav) and see an archive of all company messages. This is also where they can view store recalls and store messages.
4. **See other homepage content:** While targeting content pushes the best information to the user, some people may need to see homepages for multiple divisions. The *View as…* feature in the upper right is available only to the core flip team; it is used as a troubleshooting tool so that team members can validate what other users are seeing on their homepage. This helps them identify any issues someone might be experiencing, as the homepage is dynamic for everyone.
5. **Task assistance:** Links to tasks related to the logged-in user appear in the *I Need To* list in the upper right. This is a great place for linking to help about important, common, or seasonal activities (things that users don't do often, but that are important to attend to now). For example, when annual performance reviews begin, *I Need To* houses a link to resources about

annual reviews. Expense reporting is another example. *I need to submit an expense report* links to the expense form, as well as to a list of resources related to the form, including a step-by-step guide, a list of vendor numbers, and a form to request a vendor number.

6. **Yammer:** The Yammer feed, if there is one for the user's division or company, displays in the right rail. The most recent entry, including the number of likes and a link to comments, appears on the page. This can entice employees to see how their colleagues are weighing in. Tags at the bottom make it easy to investigate a related topic.
7. **Footer:** The small footer at the bottom of the page offers links for *Site feedback & help*, the *Featured News Archive*, and the *Happening Now Archive*.

## Homepage Personalized for Store Management




**Pictured: Loblaw Intranet Homepage (Store Management).** The homepage that is personalized for No Frills Store Management displays the *Message Centre* at the top of the page, since this is a sanctioned place for in-store employees to find information about products.

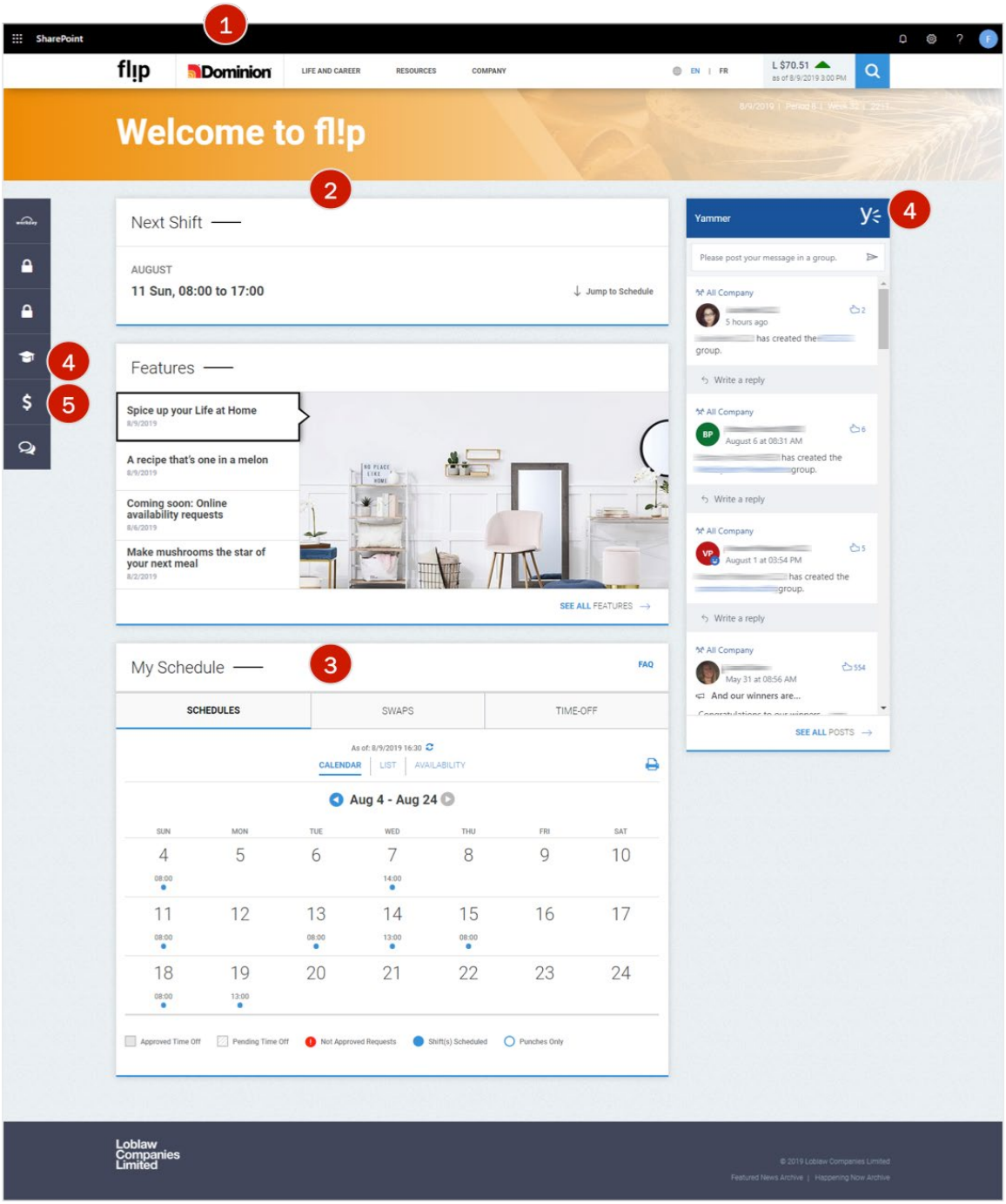
## Homepage (Store Management) Highlights

Employees in stores need to stay on top of information about all of the products the store sells, and flip is the go-to place for this accurate, time-sensitive intelligence. It's also the go-to place for store operations staff members to find the information they need to keep the stores running smoothly.

The homepage personalized for the No Frills Store Management offers some of the same sections, though positioned differently, as the homepage that's personalized for Shared Services Store Support. It also offers different sections and content.

1. **Announcements at the top of the page:** For employees working in stores, flip offers critical information for day-to-day operations. Since the *Message Centre* is the approved channel for this type of information, this section appears at the top of the content area. Cards include information about products, supply, and recalls.
2. **Store resources:** Only users with the Store Management personalized homepage see the *Store Resources* section. It appears directly below the *Message Centre* and links users directly to a prefiltered view of the most recent and commonly used store resources. The six rectangular dark blue tiles have clear text labels, small accompanying icons, and a royal blue circle with a white number showing the number of new items (added in the last seven days) in each section. The *See All Store Resources* link at the bottom of the section makes it easy for store employees to access additional resources.
3. **News at the bottom of the page:** The *Features* section includes news stories related to store management and appears at the bottom of the page.

## Homepage Personalized for Frontline (Supermarket) Employees



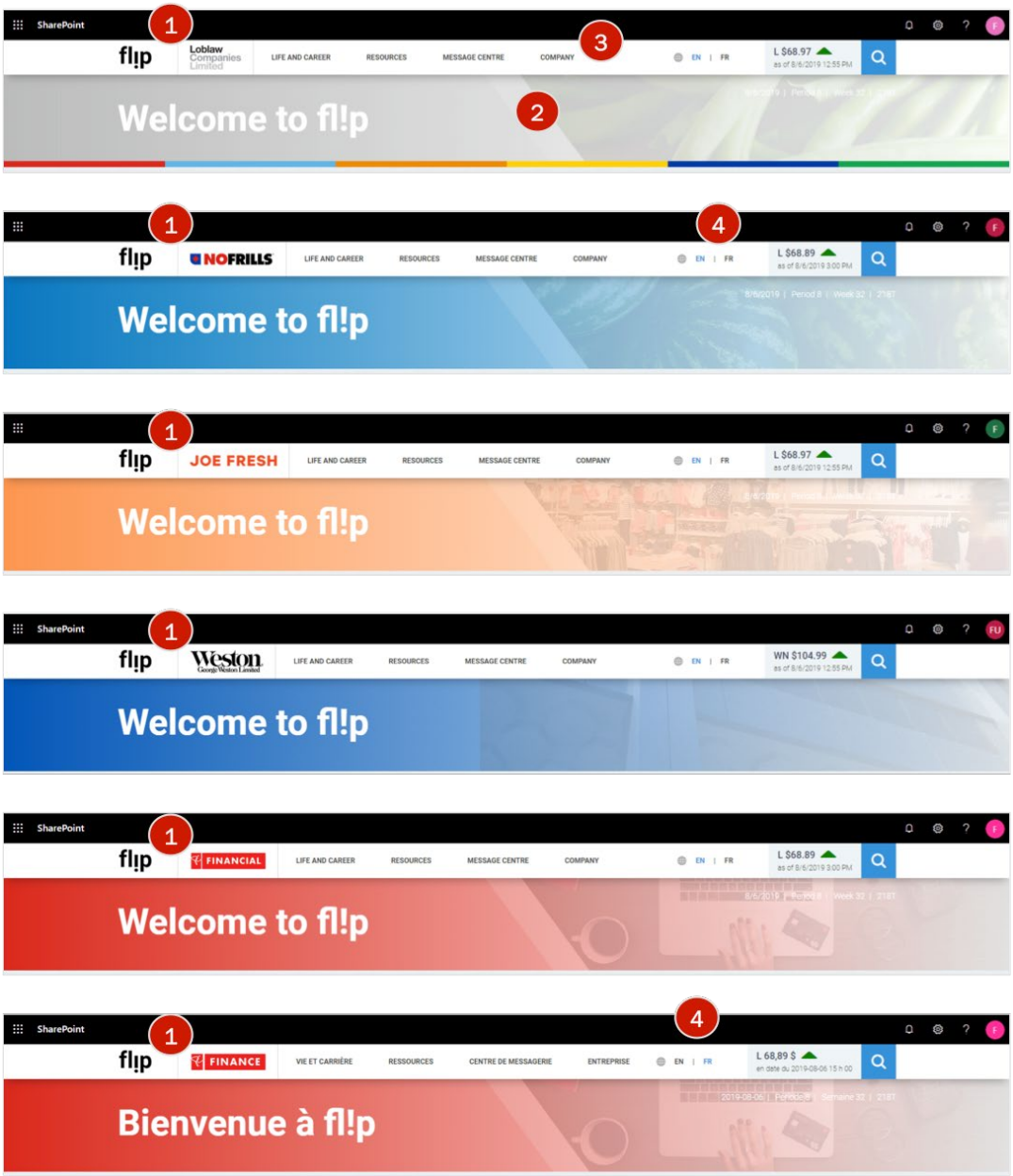

**Pictured: Loblaw Intranet Homepage Personalized for Frontline (Supermarket) Employees.** A personalized homepage for an employee working at the Dominion supermarket immediately sees next-shift and scheduling information.

## Homepage (Frontline Employees) Highlights

A personalized homepage for frontline employees—those who work in retail stores, such as supermarkets—displays information that supports their direct work with customers, along with other content related to their specific division. Various features help employees manage their time, payroll, and career.

1. **Logo:** The logo for *Dominion,* a supermarket chain, appears to the right of the flip logo, confirming for employees that they are on a homepage personalized to that store.
2. **Work shifts:** Having an adequate number of people staffing stores is a mainstay of great in-store customer service. To help ensure that employees are at work at the right time, flip displays the *Next Shift* section that clearly shows the date of the work shift, day of the week, and the start and end time. The *Jump to Schedule* link takes users to their full schedule.
3. **Schedule:** Hourly employees can use the *My Schedule* section to see their schedule (through the *Schedules* tab), change shifts with a coworker (through the *Swaps* tab), and request and review time off (through the *Time-Off* tab). A legend at the bottom of the calendar delineates the meaning of the status icons—such as *Pending Time Off* and *Not Approved Requests*—that appear with the timeslots.
4. **Connect and improve:** Loblaw believes in helping to create and cultivate coworker relationships. The Yammer feed in the right rail helps people make connections. Training options are available via the graduation cap icon in the toolbar on the left.
5. **Payroll:** The dollar sign icon in the toolbar on the left allows employees to easily access their payroll information, which is highly important to employees.

## Banner and Global Navigation



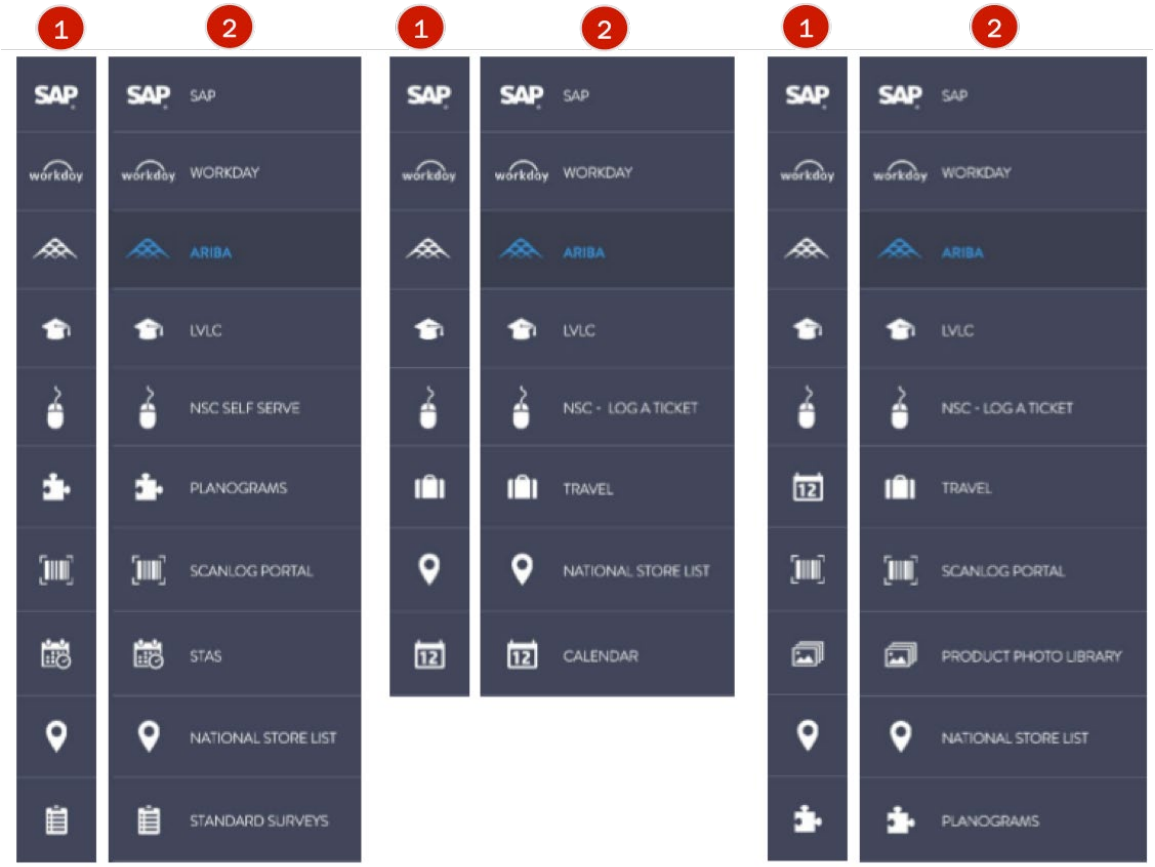

**Pictured: Loblaw Intranet Global Banners.** The logo and banner at the top of pages changes depending on the logged-in user's division.

## Banner and Global Navigation Highlights

To instill in employees a sense of community about both the company as a whole and their division, page banners are personalized—using color, logo, and background images—to reflect the logged-in user's division.

1. **Logos:** The flip logo appears in the upper left, identifying the intranet and where the user is in the Loblaw digital workplace. The logo for the logged-in user's division appears to its right; this further orients users and helps communicate that they are seeing flip content targeted by their division. The content also adapts depending on the language the user is viewing the site in.
2. **Banner:** The logged-in user's division dictates the banner and its background image at the top of the page. For example, Loblaw Companies Limited and No Frills both display images of produce along with colors found in the respective brand's guide. Likewise, Joe Fresh shows an image of clothing on racks. "Welcome to flip" is the default message, but the company often uses this space to recognize important events or dates (e.g., displaying "Happy Pride" during Pride Week) or to amplify in-store programs or campaigns. Those messages can be targeted by division and/or banner, as required.
3. **Global navigation:** The global navigation menu appears at the top of pages, to the right of the logo. The four top-level menu items—*Life and Career, Resources, Message Centre,* and *Company*—are offered for all divisions (except *Message Centre*, which is not offered for frontline employees). Links under the top-level menu categories are targeted based on the user's company, persona, and division, and on whether they are a franchise store or an executive. These links can lead to internal or external resources; they are arranged horizontally on desktop but collapsed under an icon on mobile.
4. **Language:** The flip intranet is available in English or French. The default language is automatically selected based on the user's location, but users can easily change languages using the *EN* and *FR* links in the upper right. The selected language appears in black, while the selectable language appears as a blue link, a signifier that it can be acted upon.

## Tools and Apps Access



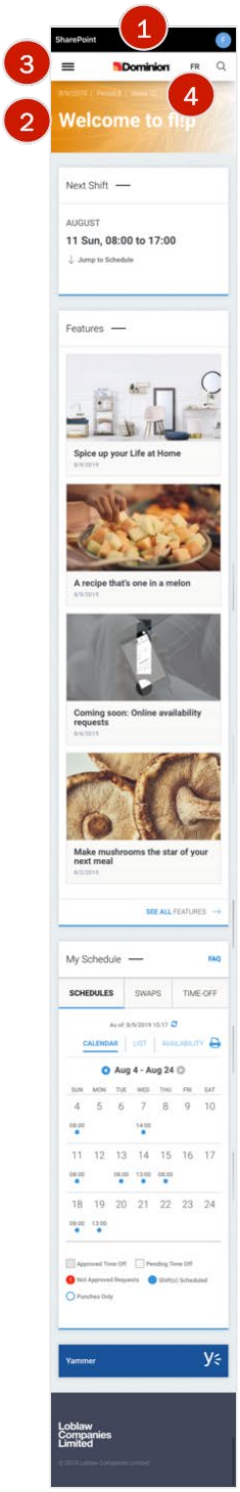

**Pictured: Loblaw Intranet Toolbar.** A toolbar on the left side of the homepage links to tools and important resources for the logged-in user. Three different personalized toolbars demonstrate that a different set of tools, as well as a different number of tools in that set, can benefit the needs of diverse employees.

## Tools and Apps Access Highlights

Access to important resources is a snap on flip. Targeted to the logged-in user's role, the homepage's left-side icon bar offers links to the user's key tools. Which icons are shown, as well as the total number displayed, depends on what would best benefit the user.

1. **Collapsed:** Icons make the tools easy to see and access on the homepage. This feature offers great benefits, while the narrow column uses only a small amount of screen real estate, leaving room for other important information.
2. **Expand:** On desktop, when users move the cursor over the toolbar, it expands to reveal the a text link with the tool's full name. This provides immediate assistance for users who are unfamiliar with a tool's icon. When viewed on mobile, the icon bar is positioned under the hamburger navigation menu icon.

## Mobile Homepage



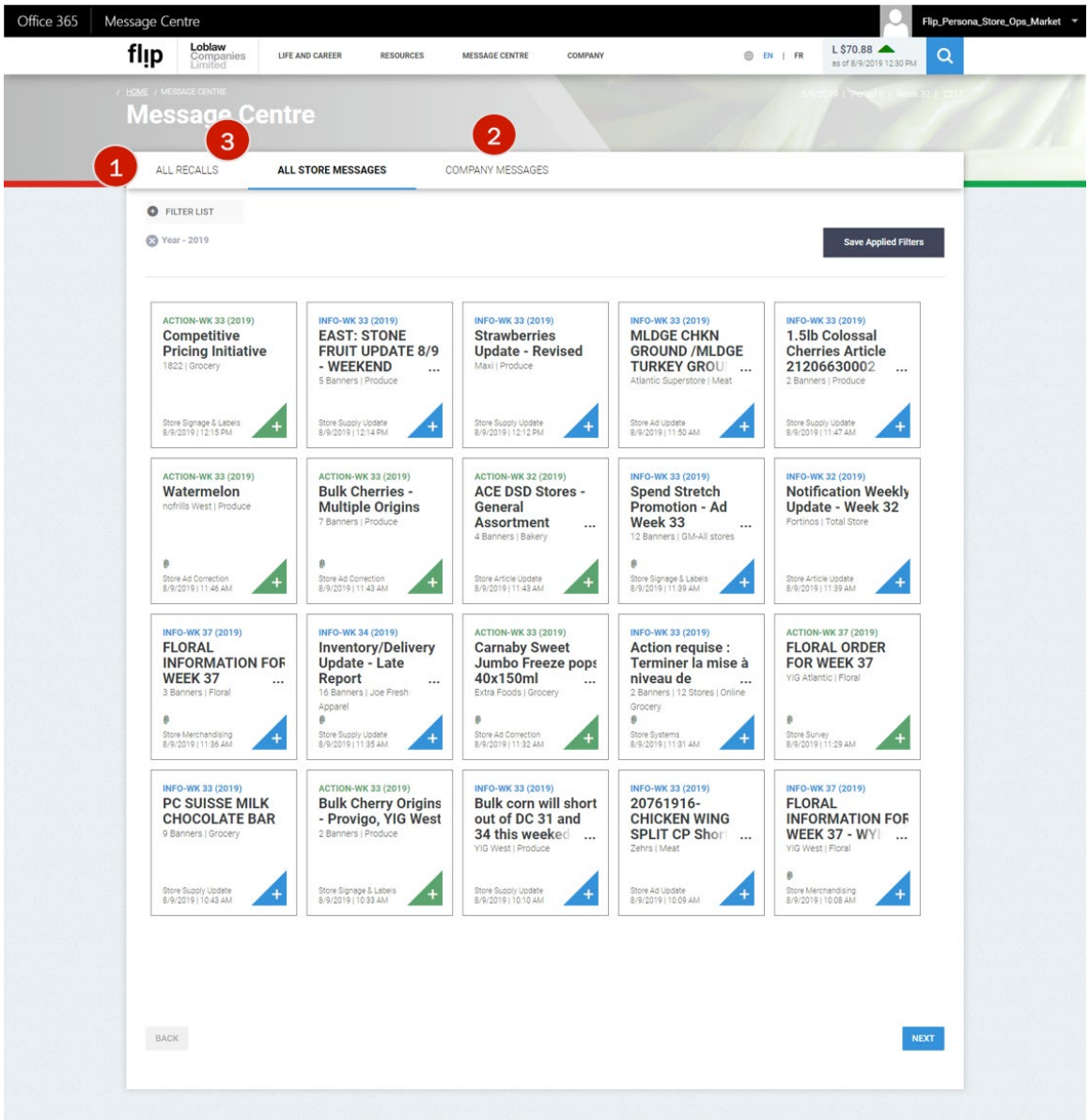

**Pictured: Loblaw Intranet Mobile Homepage.** Viewed on mobile, the responsive site's homepage assists in-store employees with managing their work shifts and more.

## Mobile Homepage Highlights

The many pharmacy and in-store workers can access important work-related information via mobile. The responsive site reorganizes content and changes UI elements from the desktop version for productive mobile use.

1. **Logo:** On mobile, the store (or division) logo remains at the top, but the flip logo disappears. With limited space, one logo had to go; because flip is mentioned in the banner, removing its logo was the best tradeoff.
2. **Banner:** While shrunk on mobile, the banner at the top of pages still acts as an anchor, featuring the division or store colors and background image.
3. **Navigation:** The menu, left-side icon toolbar, and stock price are collapsed under the hamburger menu to save space and allow room for content on the mobile screen.
4. **Language:** The current language link is eliminated to save space, showing only the link to the language that users can switch to if they choose.

## Announcements




**Pictured: Loblaw Intranet Message Centre.** The *Message Centre* includes timely announcements for stores about the company and product recalls. These are managed under three tabs.

## Announcements Highlights

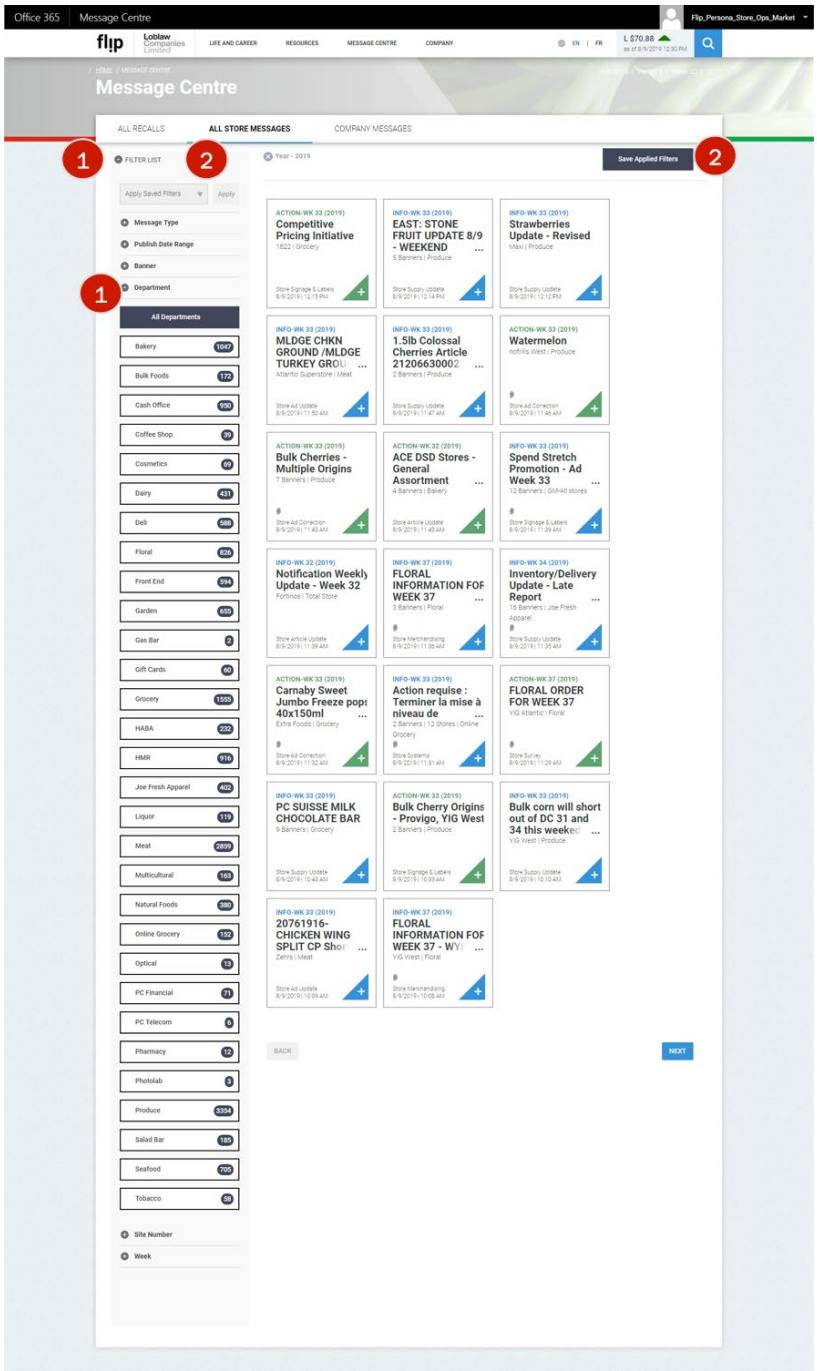
While announcements appear on the homepage for many employees, they also appear in the full *Message Centre* in three areas: Store Support, Merchandising, and Store Operations.

The *Message Centre* replaced static emails, eliminating many mass-email messages. It also makes it easier for employees to find messages and know which ones are current. Store employees see only messages that are relevant to them, which prevents compliancy issues and keeps clutter to a minimum.

Content providers have a simple wizard-like UI they use to submit, distribute, and maintain critical messages about timely topics, such as product recalls or emergencies. Based on the content provider's answers to a series of questions, metadata, targeting, and security factors are applied so that the content is visible only to the correct users.

1. **Types of messages:** The tabs at the top of the *Message Centre* allow employees to see *All Recalls, All Store Messages,* or *Company Messages.*
2. **Enterprise-wide announcements:** The *Company Messages* tab includes enterprise-wide announcements, such as executive messages from Loblaw's president, quarterly financial results messages, HR messages related to career and workplace, and other announcements related to the organization, division, team, or location. Store Support colleagues have access to any company message in which they are included as part of the targeted audience.
3. **Recalls:** Store Support colleagues have access to the *All Recalls* tab, since they work with various divisions daily and may need access to this information.

## Announcements Filtering



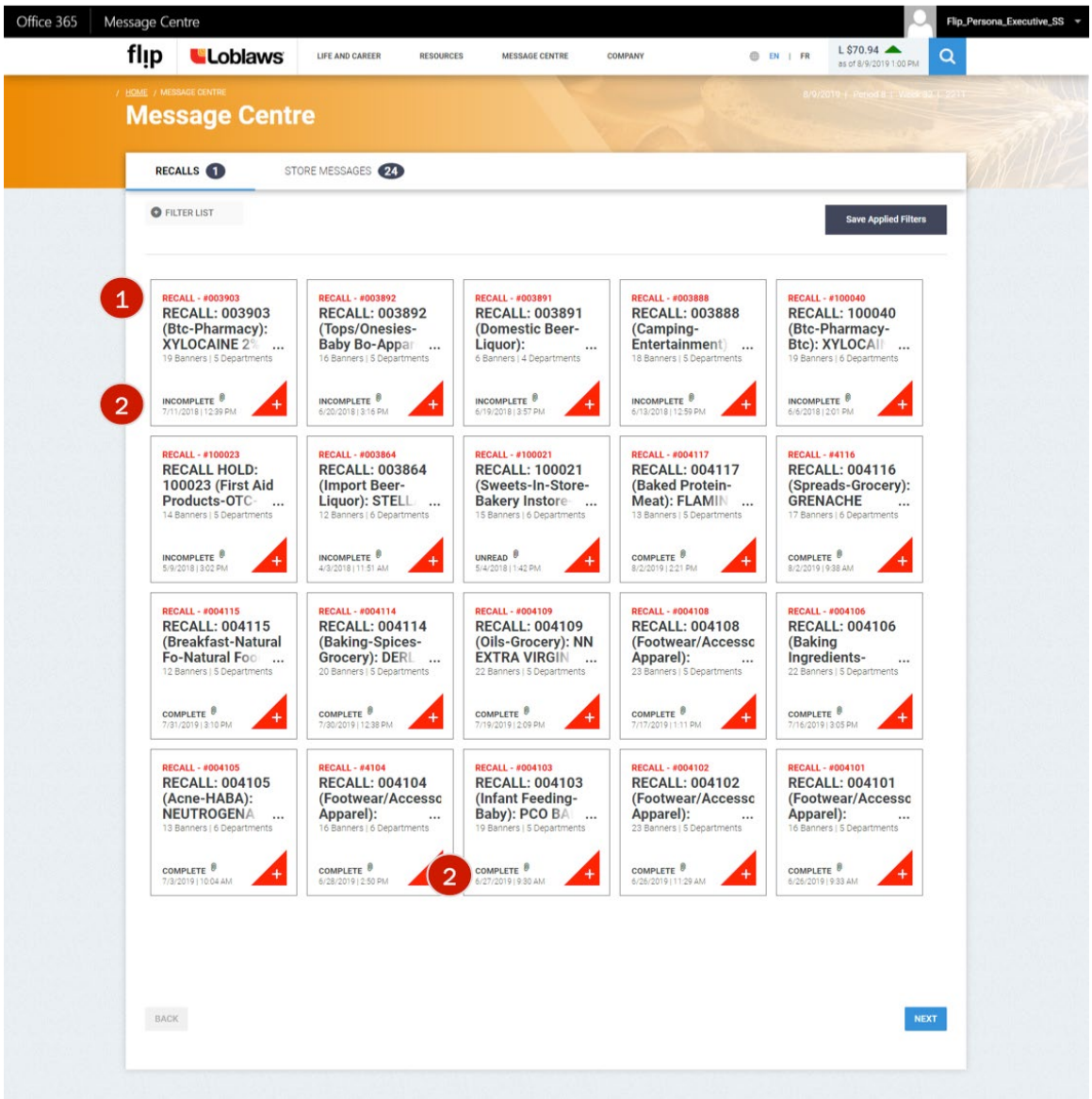

**Pictured: Loblaw Intranet Announcements Filtering.** Filtering capabilities down the left side of the *Message Centre* make it easy for employees to find a message by type, department, or other factors.

## Announcements Filtering Highlights

A large organization such as Loblaw is bound to have many announcements. Users looking for messages, such as about their department, are already spared some clutter because messages are targeted by role and location. They can also easily sift through and locate the pertinent messages using the facets on the left side of the *Message Centre.* They can even get quite specific by choosing items such as their department and the publish date range.

1. **Filtering list:** Following known UI conventions, clicking the *Filter List* link with the plus sign (+) icon in the upper left of the *Message Centre* opens the list and changes the icon to be a minus sign (–). Users can also use the plus sign to expand and display the list of facets—such as *Bakery*, *Bulk Foods*, and *Coffee Shop*—within a topic.
2. **Save and reuse search facets**: Once employees have selected a set of facets and find it valuable, they can save that search and easily repeat it later. The *Save Applied Filters* button in the upper right handily makes the save. The *Apply Saved Filters* drop-down above the list allows users to choose from their saved personal set.

## Product and Drug Recall Announcements




**Pictured: Loblaw Intranet Product and Drug Recall Announcements.** Recalls related to drugs, foods, and any other products the company sells are communicated on the *Recalls* tab.

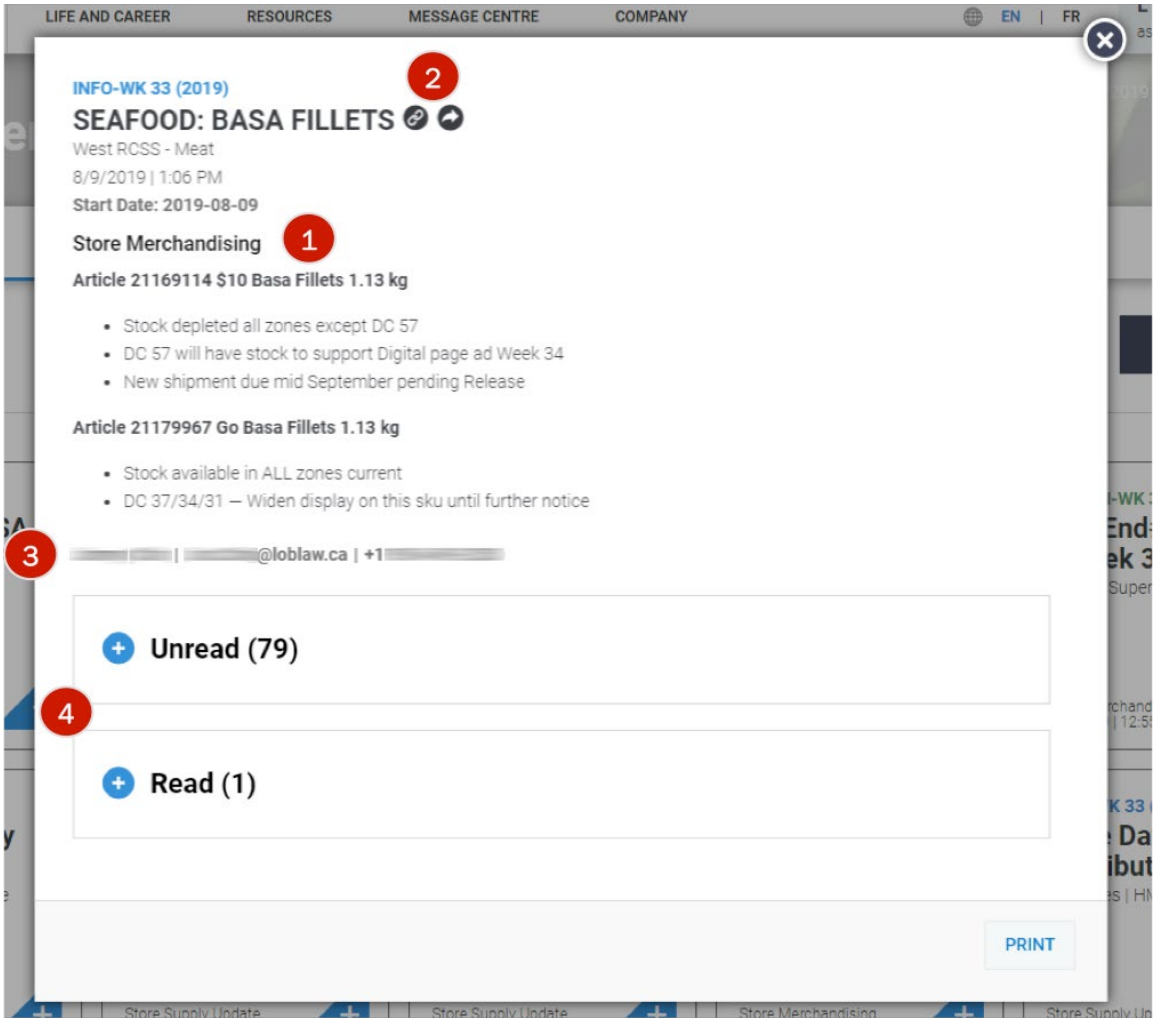
## Product and Drug Recall Announcement Highlights

To ensure customer safety, as well as to ensure that only high-quality products are sold, recalls directed at any store or pharmacy appear in the *Recalls* tab. Here, Store Support employees can see and act upon any recalls, and even export a compliance report if needed.

1. **Details:** The official recall number, location or area the recall pertains to, and the date it was posted, appear on the recall card in the *Message Centre*. It's helpful for employees to see so much pertinent information in each card.

2. **Status:** Store Support employees can view all the recalls and see which stores have read each one. The *Complete* or *Incomplete* label at the bottom of each card communicates that status and provides announcement details.

## Announcement Details




**Pictured: Loblaw Intranet Announcement Details.** Each message opens in a dialog and includes pertinent information, including which stores have read the announcement and contact information.

### Announcement Details Highlights

Each announcement message opens in a dialog and includes pertinent information about the product recall, including which stores have read it, contact information, and a few sentences summarizing the recall.

1. **Details:** Specifics about the recall—such as the start date, where the item is in stock, how to respond, and more—appear in the message.
2. **Share:** Through flip, employees can easily notify one another about a recall. The link icon to the right of the title enables the user to copy a link to share. As long as the link recipient has access to the recall message, they can read it. Clicking the arrow icon, just to the right of the link icon, launches the user's email client and copies the message into an email, making it abundantly easy to share the recall details with a colleague.
3. **Contact:** A contact name, email, and phone number appear at the end of the recall announcement. With this, employees can ask follow-up questions if needed.
4. **Who has read it:** Clicking the plus icon by the *Unread* and *Read* buttons displays a list of stores who have read or not read the message.

## DESIGN PROCESS AND USABILITY WORK

The team based its project research approach on who it would be talking to and the information it expected to learn. For example, the team could sit next to corporate employees at their own desks and conduct observation sessions that combined a structured interview with exploration on the current state platforms. This method let the researchers directly observe user patterns, pain points, and opportunities.

For frontline employees, the team gravitated toward surveys that gather larger amounts of data or small group interviews, which let team members discuss ideas for potential features, barriers to use or adoption, and so on.

The overall project was executed through three major phases, beginning in January 2015. The three phases played out as follows:

- **Phase I—Roadmap:** During an initial roadmap phase, the team conducted research using a variety of methods, including: reviews of the current state experience and other relevant assets; visioning sessions with key stakeholders and leadership to understand the opportunities and pain points from their perspectives; voice-of-the-user sessions with many types of employees to build a holistic understanding of the broader opportunities and problem areas; and a nuanced understanding of the different types of audiences and their unique needs. Then they created personas that focused on each user type's key pain points, tasks, expected gains, and critical features and functionality. By looking at the project through this user-centric lens, the team was able to prioritize initiatives and requirements according to their relative value to users.

  This research formed the baseline understanding for team members as they embarked on building out the roadmap and vision, which stretched a number of years into the future and was walked-back to form the direction for the first project phase.

  A few key activities stood out as pivotal during the Roadmap phase.

  - **Voice-of-the-user sessions:** Twelve voice-of-the-user sessions were conducted during the roadmap phase. In these sessions, core project team members and representatives from Rightpoint traveled to four cities in Canada (Montreal, Ottawa, Toronto, and Calgary) and met with colleagues at their stores to do interviews, brainstorm, and conduct surveys. During these sessions, they met with more than 120 colleagues representing different business areas and levels within the company.
  - **Survey:** Following these voice-of-the-user sessions, an online survey was conducted and received more than 480 responses.

    - **Requirements matrix:** The team assembled a requirements matrix from the data collected during the voice-of-the-user sessions. In this matrix, each of the requirements was weighted according to technical complexity and business value to create a business priority graph. Then they performed additional analysis to identify business drivers and constraints to help shape the roadmap.
    - **Personas:** Personas were created to represent the perspectives of different user types and the functionality that would best support them.

- **Phase II—Creative/technical design and content strategy:** The second phase involved Rightpoint's UX, creative design, technical design, and content strategy teams working together with the Loblaw communication team to create detailed wireframes of pages and functionality, as well as a style guide. The Rightpoint teams also helped the internal project team identify the IA needed to integrate the intranet with other systems. This was all aggregated to provide the implementation team with everything it needed for its work.
- **Phase III—Implementation:** During this phase, the Rightpoint team worked with the internal project team to determine the minimal viable functionality needed for the product release. Implementation work was carried out over a series of sprints to provide a "show and tell" to transfer knowledge from the delivery team to the communication team so the latter could learn about the new functionality and provide feedback.

  The first release took two sprints to complete. These sprints were focused on completing the foundational work needed so that the project team would be able to pick and choose which functionality to work on in the sprints that followed. This approach helped the communication team see the incremental progress being made and gave it an opportunity to provide feedback or quickly adjust the implementation. It also gave the communication team an opportunity to consider having an internal, business go-live preview once it felt that enough functionality was ready to demonstrate value to users.

Research work didn't end at launch. Loblaw's internal intranet team is deeply committed to creating a best-in-class UX, which has meant engaging with employees in an ongoing manner so that the team can understand how well things are working on the new intranet and what it should focus on next.

## Adoption/Buy-In

Buy-in for this project started with Loblaw's store operations teams, who recognized the opportunities that the intranet would create for better store execution.

The company's most senior executives were excited about the chance to communicate with frontline colleagues—who are the largest part of Loblaw's workforce, yet they had no direct line of communication. At the time, the company was investing heavily in customer-focused technology; the idea of treating colleagues with a similar, consumer-grade experience was appealing.

To drive adoption, the team put the most relevant and useful content front-and-center to create a site that colleagues would want to visit and an experience that they would love.

One of the best examples of this is the flip experience for frontline workers. The design team knew that the most desirable content for these colleagues is their schedule. Prior to flip, store employees relied on a paper schedule that was posted in-store—which meant they had to travel to their store weekly to find out when they were working. Team members worked alongside the scheduling team to ensure that they could surface schedules right on the flip homepage. This feature has proven to be quite successful, as evidenced by a 74% frontline employee engagement rate to date.

The team applies this type of approach to all content that goes on flip, ensuring that the site remains relevant and fresh, and is a trusted source for information.

| WORKING WITH OUTSIDE AGENCIES | |
|---|---|
| **Agency** | **Project Role** |
| **Rightpoint**<br>A strategy, UX, creative design, and technology agency | Created the project roadmap, designed the IA, conducted voice-of-the-user sessions with relevant user groups, created the style guide and visual design, designed the technical architecture, performed the implementation, and provided Service Desk support services. |

## GOVERNANCE

The flip team is part of the Corporate Affairs and Communication group. Placing the intranet team within this group created new roles and new ways of working. These new roles include:

- **A two-person editorial team:** The editorial team manages homepage features with a newsroom-like approach. This team works closely with the internal communication team to identify newsworthy content; it also works with a roster of freelance writers to ensure flip offers high-quality storytelling with a consistent voice and style.
- **Analytics lead:** This person is responsible for pulling user data from flip into Power BI and building dashboards that make it easy to spot trends and issues. These insights help the team make content decisions to ensure that the site contains the most useful tools and information for colleagues.
- **Yammer community manager:** This manager's job is to monitor and encourage Yammer conversations, answer questions, and encourage connections between colleagues, and also to help ensure that through those connections great stories surface.

Having a dedicated team own the intranet ensures that content is always fresh, style and voice is maintained, and the site is constantly improving through enhancements.

| INTRANET TEAM RESPONSIBILITIES | |
|---|---|
| **Role** | **Responsibilities** |
| **Core flip Team** | Governance and management of site and team:<br>• Maintain flip style, voice, and tone<br>• Leverage ongoing user feedback and analytics to help identify, prioritize, and provide business requirements for site enhancements<br>• Identify future integration opportunities and champion the colleague digital experience by working with other business teams<br>• Administer the flip Yammer group, where colleagues often ask questions and suggest site content |
| **Editorial Team** | • Develop and govern editorial content strategy<br>• Maintain editorial calendar, ensuring that the most timely, relevant, and engaging content is scheduled and targeted to the correct audience(s)<br>• Develop and write feature content or assign features to freelance writers; work with creative team on accompanying photos, graphics, and videos<br>• Develop amplification strategy, which includes Yammer posts and external social sharing<br>• Review, edit, and publish daily content<br>• Monitor analytics to inform future content decisions<br>• Maintain internal pages to ensure that content is current and relevant<br>• Evaluate new page requests to ensure that they meet flip criteria and fit in the IA; develop content for approved pages |
| **Communication Analysts** | • Review all incoming message center, store, and work resources submissions to ensure that content meets flip guidelines and standards and is targeted appropriately; this is a high-volume job, with hundreds of requests coming in each week<br>• Work with content providers on complex message and resource requirements<br>• Train new content providers<br>• Identify opportunities to improve content |

| | |
|---|---|
| **Analytics and Insights Team** | • Develop and maintain a series of analytic dashboards that flip stakeholders can access to assess site and content<br>• Provide ad hoc reporting, as required |

## URL AND ACCESS

| ACCESS INFORMATION | |
|---|---|
| **Item** | **Status** |
| **URL** | https://flip.ca |
| **Default Status** | On corporate devices, flip is set as the default homepage and a flip icon is on the desktop. Users cannot change the setting on these devices. |
| **Remote Access** | Users can also access flip from any device with an internet connection by navigating to flip.ca and entering their username and password. |
| **Shared Workstations** | Loblaw store managers do most of their work face-to-face on the store floor, serving customers and helping colleagues. When they need to go online to access flip or other tools, they use shared workstations located in colleague-only store areas. |

## TIMELINE

| PROJECT MILESTONES | |
|---|---|
| **Milestone Date** | **Milestone Description** |
| **September 2005** | • Launched Loblaw Inside, the company's first corporate intranet, to approximately 8,000 corporate office colleagues |
| **2010** | • Redesigned/replatformed Loblaw Inside, moving from Dreamweaver to SharePoint 2007<br>• Introduced distributed content publishing model for Loblaw Inside<br>• Launched Front Page, Loblaw's store communication portal, built in SharePoint 2007; this replaced email as the primary means of all store communication |
| **January–April 2015** | • Launched discovery and roadmap for redesign project to bring together Loblaw Inside, Front Page, and several smaller internal sites |
| **September 2015–February 2016** | • Design phase<br>• Content audit, review, and strategy<br>• Wireframes<br>• Style guide<br>• Visual design<br>• Technical design |
| **March–July 2016** | • Evaluated Google and Microsoft to make a business decision on a complete platform (including email, web applications, and collaboration tools) |
| **September 2016** | • Planned sprint-based delivery and revisited functionality priorities; set up features and backlog; and documented acceptance criteria of backlog items |
| **October 2016–January 2017** | • Foundational release and automation testing |
| **October 2016–May 2017** | • Content audit, review, and migration decisions |
| **April 2017** | • MVP release |
| **May 2017–June 2017** | • Created new content and migrated existing content |
| **June 2017** | • Launched to PC Financial Division (~200 colleagues) and decommissioned PC Financial intranet |
| **July 2017** | • Launched to all Store Support (office) divisions and personas; decommissioned Loblaw Inside |
| **October 2017** | • Introduced *Message Centre*<br>• Launched to store management |
| **March 2018** | • Held frontline focus groups to test content ideas and themes prior to frontline launch |

| | |
|---|---|
| **April 2018** | • Launched to corporate, non-union frontline colleagues in two banners only |
| **July 2018** | • Launched to George Weston Limited and Choice Properties REIT<br>• Held frontline focus groups to get feedback from people who had used flip and garner insights about scheduling needs |
| **October 2018–January 2019** | • Rolling launch to all remaining frontline corporate colleagues |
| **February 2019** | • Launched phase 1 real-time scheduling to frontline colleagues, including current and upcoming schedules, past punches, and time-off requests |
| **August 2019** | • Launched phase 2 real-time scheduling to frontline colleagues, with the availability to swap shifts and view and change availability |
| **Overall redesign timeframe:** Approximately 4 years | |

## CONTENT AND CONTENT CONTRIBUTORS

### Users Are Eager to Contribute

The flip team has experienced few problems with getting content contributions. Incoming requests exceed editorial capacity, which allows the team to be selective, choosing only the most relevant and engaging story angles for the homepage.

Because flip is now the company's only intranet and its main internal communication vehicle, most internal teams want their content posted. That's not to say the system is perfect, but it mostly works quite well. When team members encounter content outside of flip, they meet with the content owners to highlight the benefits of moving it to flip, including that it will be easily found via search; it can be appropriately targeted and secured; and they can take advantage of flip analytics to learn about how people are using their content.

Content responsibilities vary by site area.

- **Homepage content:** Feature stories and *Happening Now* content are centrally owned and managed by the flip editorial team. The team accepts story idea submissions from anywhere in the business and evaluates them against the flip content strategy. Story ideas that make the cut are either produced by the flip team, the internal communication team, or external freelancers.
- **Interior page content:** Interior flip page content is created collaboratively with the flip editorial team and the subject matter experts, with the flip team providing final approval and publishing the content. When new pages are requested, the flip team assesses them for alignment with the flip content strategy; if the pages align, the team finds an appropriate home for the new content in the IA. The team then provides a content template so the subject matter expert can provide the key information required for the flip team to draft the page.

- **Message Centre and store/work resources:** There are approximately 600 people who regularly contribute content to flip using the flip requests intake process. These people are typically the subject matter experts for the content they are uploading. There are three types of content:
    - **Targeted messages.** The majority of these messages are operational messages for stores (approximately 180 per day).
    - **Store resources.** These are documents that stores need to run their business.
    - **Work resources.** These are documents and forms required throughout the business, such as policies, HR materials, reference documents, learning resources, templates, and forms.

### Training

The flip team has created comprehensive guides to walk content providers through the process so they can easily upload messages and resources. It also holds regular in-person training sessions with new content providers and provides one-on-one support as required.

### Maintaining Content Quality

Either the flip editorial team (homepage content and pages) or the flip communication analysts (*Message Centre* and store/work resources) approve content prior to publication. The team also conducts ad hoc reviews to ensure that content remains fresh and is updated as required. Future analytics improvements will make these reviews more rigorous and help the team identify documents and pages that either have not been accessed or have had limited views within a predetermined timeframe so they can be reviewed.

Analytics are also useful for improving the site content. By reviewing the content that is most (or least) accessed and who is accessing it, the team can gain insights into which content is working and which content needs improvement. The team also regularly reviews search data for the same reason. If it sees a spike in a specific search query, or a query returns no results, the team will investigate to see if the spike is indicating an opportunity to create or improve content.

Duplicate or contradictory content is not often an issue because the central content team often identifies it before it is published.

### Culling Content

Culling content was a significant part of the project, specifically when deciding what needed to move from the old corporate intranet, Loblaw Inside, to the new site. An initial content inventory revealed 22,000 pieces of content on the old site, with 63 percent of it contained in documents (mainly PDF, Word, or PowerPoint). The flip content lead was able to quickly reduce that number by eliminating three types of content:

- Any content that was more than three years old (72% of documents)

- Duplicate content
- Content that was out-of-date, which was obvious from just the title

The team was left with 7,000 pieces of content that needed subject matter expert review to determine if it should be moved to the new site.

The content lead met with content owners individually, providing each with a spreadsheet of their existing content and a specific set of questions to ask themselves as they reviewed their content:

- Is the content current?
- Is it accurate?
- Does it reference outdated programs or past deadlines?
- Will colleagues access this item frequently? Put yourself in the mindset of a user.
- Is the information already available elsewhere?
- Is there similar content available?
- Does it follow correct branding and content guidelines?
- Does it convey information effectively? Would another format be better?
- Who will maintain it going forward?

This last question was important as the team found that many subject matter experts were inclined to let old content stand, "just in case," until it was clear that they would need to own and maintain the content.

After the content owner review was complete, the flip team was left with a manageable 900 pieces of content to migrate.

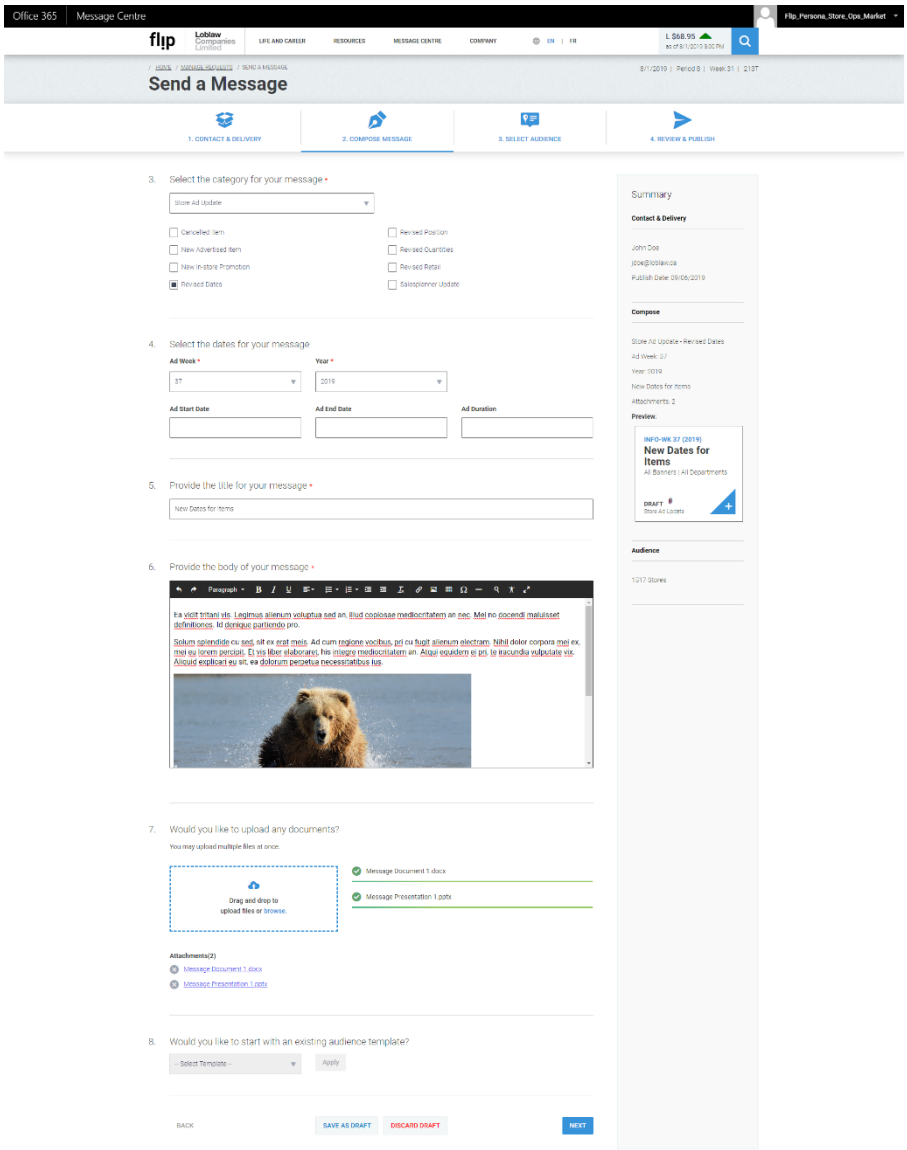
### Message Centre and the Content Intake Process

*Message Centre* is a wizard-like intake form that allows content owners to upload different types of content to flip, including messages and store and work resources. The process guides content contributors through a series of questions; based on their responses, the system automatically applies the metadata, targeting, and security to ensure that the content is visible to the right users and, in the case of resources (documents), visible through search.

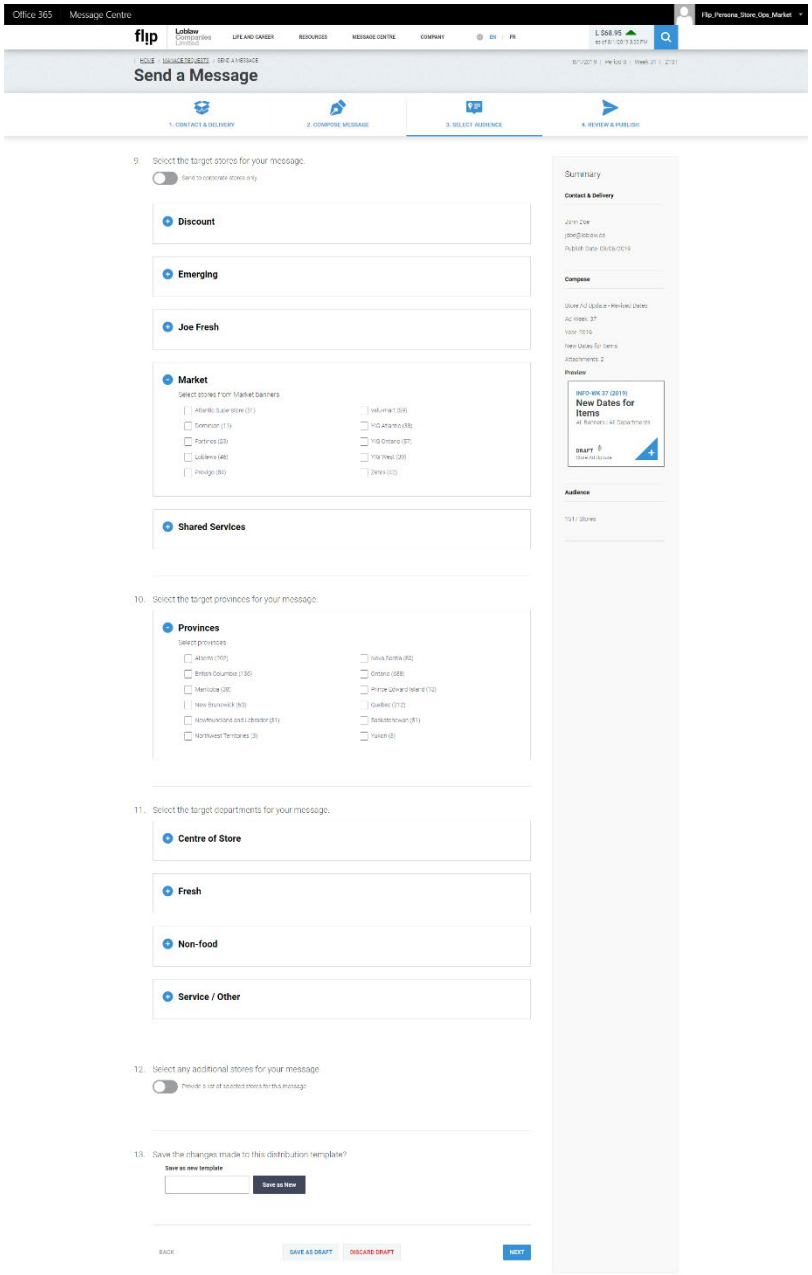
*Message Centre* is a major improvement over the old Store Communication site as its detailed targeting capabilities mean stores see only messages that are relevant to them. It also contains filters; so, for example, bakery managers see only the messages relevant to their department.

This targeting capability also means that stores can't see messages that are targeted to other stores, which prevents compliance violations.

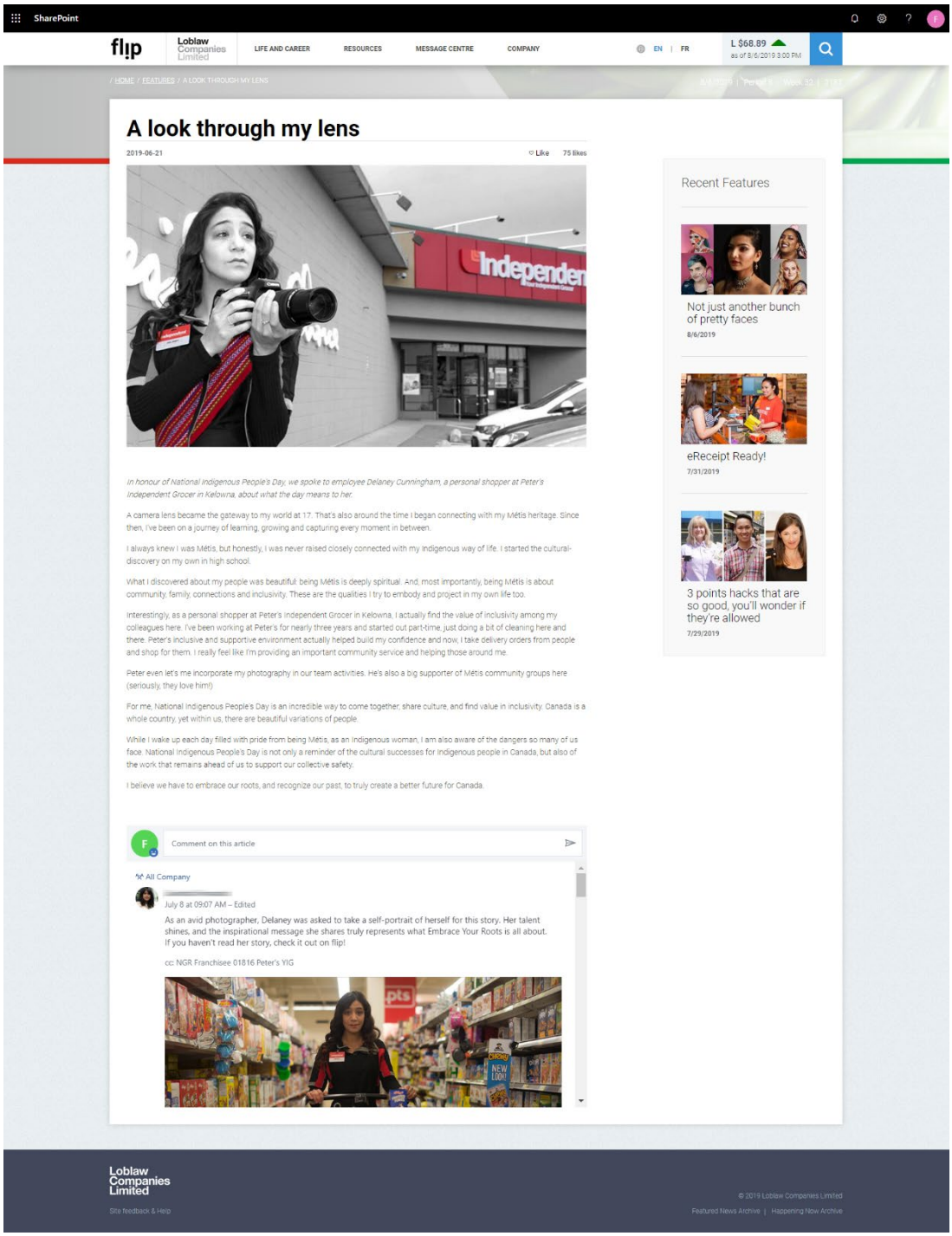
*Message Centre* was designed primarily to replace the core functionality of the old store communication site (Front Page). The team extended it to nonstore colleagues, however, to replace the need for mass emails for company messages, which also means no more distribution list maintenance and no more lost email.




**Pictured: Loblaw Intranet Compose Store Messages Process.** The "compose audience" step of the message intake process makes it easy for content providers to create a message and add images or attachments. Users may need to upload one or more files to include with the message, and the form allows them to either drag-and-drop or browse and select files. An upload progress indicator is displayed for each file and—once completed—a checkmark displays to show that the upload is complete. If users need to remove an uploaded attachment from a message, they can select the remove button next to the list of uploaded attachments.




**Pictured: Loblaw Intranet Compose Store Messages Process.** The next step in the compose process is to select which stores should receive the message. By default, all stores will receive a message if nothing is selected. A total count of stores that will receive the message is listed under the *Audience* section of the *Summary* area. Accordion controls listing division names contain checkboxes with the banners within that division, along with the number of stores within each banner. The same is true with *Provinces*, which lists the number of stores within each province.




**Pictured: Loblaw Intranet Feature Story.** This shows a feature story in the desktop view. Stories include eye-catching images or video and short, colleague-focused content. Liking and commenting give colleagues ways to engage with the feature.

## TECHNOLOGY

| TECHNOLOGY | |
|---|---|
| **Category** | **Technology Used** |
| **Web Server Hardware and Operating System** | • Office 365 and SharePoint Online<br>• Microsoft Azure:<br>  ○ App Service Plan<br>  ○ App Service<br>  ○ CDN<br>  ○ Redis Cache<br>  ○ Azure Search<br>  ○ Azure SQL Database<br>  ○ Service Bus<br>  ○ Logic Apps<br>  ○ Application Insights<br>• Azure Data Factory |
| **Bug Tracking/Quality Assurance** | • Microsoft Azure DevOps for managing backlog, sprints, test plans, defect tracking |
| **Design Tools** | • InVision<br>• Sketch<br>• Adobe Photoshop<br>• Adobe Illustrator |
| **Site Building Tools** | • Visual Studio<br>• Visual Studio Code<br>• ASP.NET Web API<br>• ASP.NET MVC<br>• Entity Framework<br>• React and Redux<br>• Gulp<br>• SharePoint/Office 365 Developer Patterns and Practices |
| **Content Management Tools** | • Office 365 SharePoint Online |
| **Search** | • SharePoint Online Search<br>• Azure Search |
| **Other Functions** | • Microsoft Azure DevOps for automated builds and release management<br>• Qumu<br>• Xignite<br>• Ephox<br>• Yammer |

## MOBILE

### A Mobile-First Approach

Knowing that the majority of users would be accessing flip through a mobile device, it was important to approach the design with a mobile-first mindset. The team chose a responsive rather than an adaptive approach because of the wide range of devices used throughout the organization.

The goal was to create an experience that was similar regardless of device. The same content now appears across all devices and displays in a way that works best at each break point. This allows for full pages of content to be displayed on larger screens, with the same content available for smaller screens, albeit sometimes with a slightly different display appropriate to the screen's size. In some cases, content may be broken up into chunks of information that can be "opened up," as necessary, on a smaller device.

Starting with the small form-factor helped team members take a prioritized design approach, as they had to discern which were the most important pieces of content or actions at any given point in a user journey.

Once they laid groundwork for the mobile design, team members then designed across device sizes to ensure that the content displayed appropriately on any device.

### Understanding the Mobile Audience

Frontline (store) employees are a core audience for the Loblaw intranet experience, and their work environment dictates that they access the intranet in particular ways. It was thus important that the team understand the frontline context, including when and where these employees need access to online information and tools. For example, many frontline employees access the intranet only from shared computers in store break rooms or back rooms, and they don't necessarily have desktop computers at home.

Understanding the logistics of these workers' access was as important as understanding their shift schedule, their need to access important messages, who they work with, and other contextual details about their work lives. Optimizing the mobile experience for these workers was of particular importance to the design team, so it focused its efforts on targeted tasks to serve this specific audience of mobile users.

The design team executed rounds of research (via multilocation focus groups and surveys) to determine which tasks and features were most in demand. One of areas that was shown to be important was scheduling. Users needed features to support tasks such as the ability to see their schedule, swap shifts, request time off, and list their availability. Scheduling was not initially included in flip, but research revealed that it was a much-desired feature for frontline colleagues so it was included in the design.

The team also held workshops and meetings with frontline managers and representatives from specific groups (such as pharmacy). Its goal was to try to understand potential barriers to adoption and which features would be must-haves to win critical endorsements from the various frontline groups.

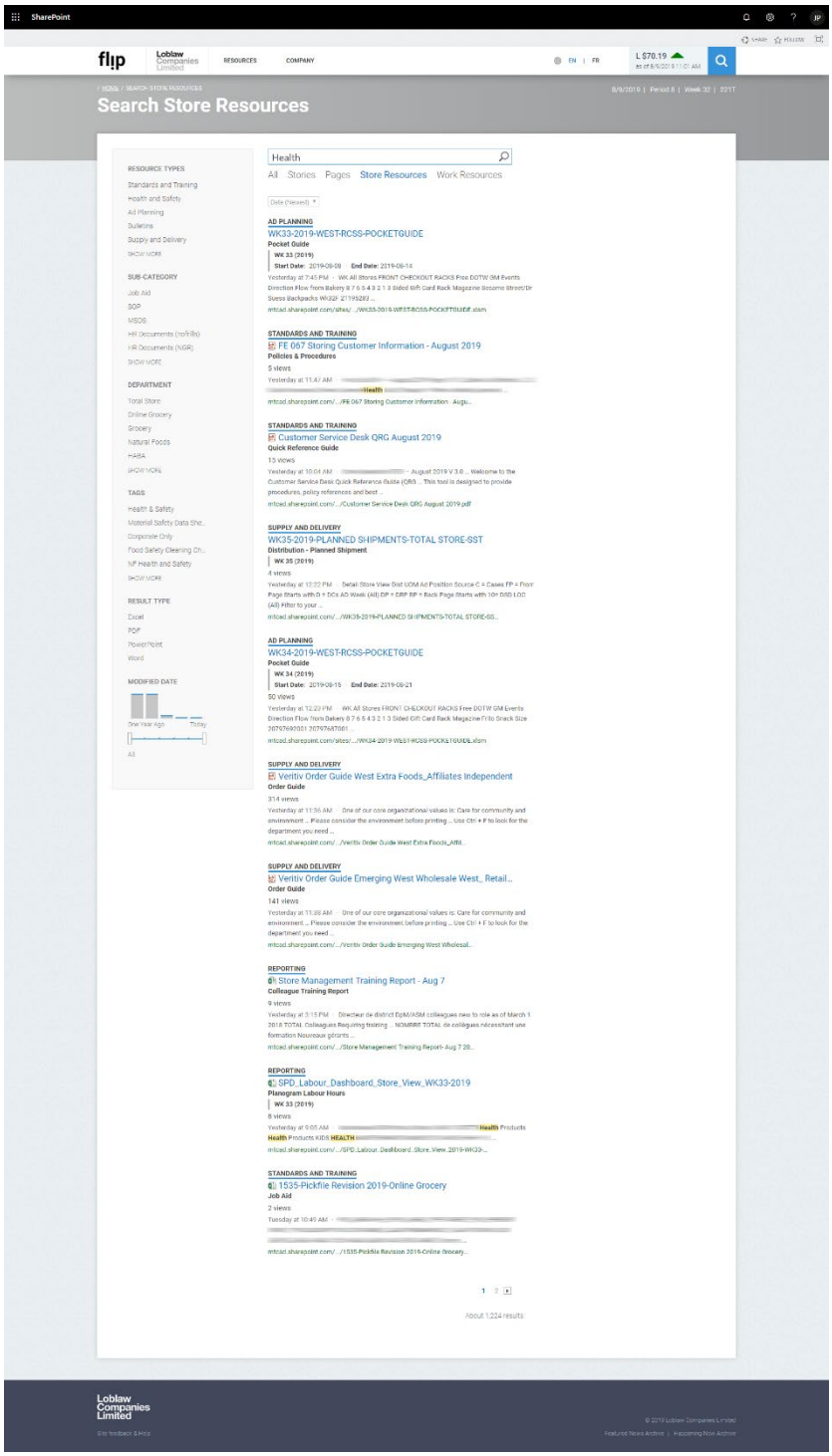
By engaging with colleagues early in the process and before additional functionality was designed or built, the team collectively gained an understanding of the data-backed priorities of these users. It then applied this valuable input when planning additional features.

## SEARCH

### Search Technology

The Loblaw intranet utilizes two search technologies:

- **SharePoint:** The SharePoint search engine is used for indexing, ranking, and providing results for published article content, web pages, and documents hosted within SharePoint Online. Custom HTML display templates were designed and used to present relevant information about each result, depending on the content type.
- **Azure:** Azure is used for message-based content hosted within *Message Centre*. It is also used to help narrow the valid selections when users choose the message audience within the *Message Centre* form fields.




**Pictured: Loblaw Intranet Search Results.** Customized SharePoint display templates were created to show additional information specific to the type of content being returned in the search results.

## YAMMER

Knowing that building friendships at work helps to improve employee retention, the team implemented Yammer to help develop a bond between coworkers. According to research, employees who have a friend at work are more likely to stay longer and be more engaged. Yammer is great way to foster these connections and encourage colleagues to make and fuel connections.

One of the top opportunity areas identified in the team's user research was: "online, two-way collaboration." Since flip is developed in SharePoint, Yammer was a natural choice for internal social networking.

Each user's personal Yammer feed is integrated into the flip homepage. This ensures that the most recent and relevant Yammer conversations are instantly visible when people log in to flip.

Loblaw has also deployed bots to ensure the company's Yammer guidelines are met. These guidelines prevent unauthorized employees from posting in the *All Company* feed and ensure that all new groups are created as private groups. There are many public groups available as well, but these require permission from the flip team before they are visible publicly. This approach differs from most Yammer deployments, but it is necessary due to the complexity of Loblaw's business and the need to ensure separation of content between corporate and franchise stores.

## ROI

### Meeting Deadlines

Early measures of return were based on the team meeting its deadlines. For example, prior to flip, the Shoppers Drug Mart division had access to a single intranet built on Google, which housed important tools and documents. It was critical to deploy flip prior to the end of the Google contract to provide a new home for those resources and ensure that work was not interrupted for the Shoppers' Drug Mart colleagues.

The launch of a new payslip solution presented another firm deadline to deploy flip to frontline colleagues. Without flip, it would have been difficult to communicate the change in payslips to those colleagues. Because flip was launched first, it was easy to add a quick link to the new payslip location, so colleagues didn't need to remember another URL or password, but could simply move from flip to the new payslip site.

### Tracking Metrics

The team also tracked stats such as unique site visitors and frontline reach to gauge the success of its communication plan. This was important for frontline, where nondigital communication methods had to be used to launch the platform. Similarly, stats such as dynamic scheduling usage illustrate the success of that feature, with more than 72% of colleagues interacting with the schedule in some way.

The team also regularly reviews several KPIs and metrics to keep a pulse check on the intranet's performance. Other measures include:

- **Unique site visitors:** By mid-2019, approximately 132,400 people had access to flip. Of those, an average of 70,000 were logging on each week.

- **Frontline reach:** The team actively tracks the number of colleagues who log on to flip. It also shares this data with store operations teams so they can intervene and assist stores with lower adoption rates.
- **Editorial content readership:** On average, 10% of those logging on each week click on the editorial content. This number has grown consistently since the site launched.
- **Editorial reach:** The team looks at the specific targeted groups to determine whether content is effectively reaching its intended audiences. In some cases, targeted reach is as high as 70%. Features with the highest reach are typically targeted to smaller teams with highly division-specific content. For example, PC Financial achieves high reach on quarterly business updates from the division president and on colleague profiles. As an example of the latter, one colleague shared his coming out story for Pride Month, and it was read by nearly 70% of his division colleagues.
- **Search queries:** The team tracks the number of queries and the number of queries that return no results.
- **Dynamic scheduling usage:** For stores using dynamic scheduling, the team tracks the number of interactions with dynamic features, such as creating or updating a time-off request.

The team also tracks success through subjective measurements:

- **Editorial engagement:** Recognizing that page views tell only part of the story, the team also tracks colleague engagement with editorial content through actions such as liking, commenting, and asking questions. Editorial content is often amplified through Yammer, so this activity is also tracked. The team uses the information to discern what percentage of people who click on a feature are compelled to act as a result.
- **Editorial themes and attributes:** The flip editorial team tracks things such as the theme of each feature (such as diversity or digital retail), the author, and whether the feature contains a video. The team uses this data to better understand which content resonates most with colleagues. For example: Do stories with videos perform better? Are there particular authors who attract more readers?

## BEST PRACTICES

Based on stakeholder interviews, user observations, current analytics, and other business-related requirements, the Loblaw team developed a solution that was focused on enabling and empowering all colleagues to improve their efficiency at completing everyday tasks. Paying attention to the details is what made this project and this platform succeed. Following are some of the things the team learned while doing this work.

- **A lightweight platform serves a wide audience.** "The overall design needed to be lightweight and incredibly user-friendly to ensure it was accessible within many different environments, settings, and connection speeds. The Wi-Fi capabilities within the stores were aging and not at professional speeds in most locations across the entire country. Loss of connection or heavy loads would be an instant barrier to engagement and would develop frustration and an overall loss of trust for the tool."
- **Give users the tools they need and they will succeed.** "Managers now have a dashboard to review their store's performance and employee efficiency, cost management, and sales. The *Message Centre* enabled quick action on items such as product recalls and spot promotions. This helps management improve workflow between corporate headquarters and stores. In order to help provide consistency, the store sales-floor planners, ad planning, signage, and training opportunities are also provided at a quick glance."
- **Context is critical for building successful user experiences.** "In a public and high-energy workplace, understanding the context for users is much more important than for an intranet within a more traditional corporate setting. While all the classic conditions around system usability, IA, accessibility, and engaging design are important, the challenges employees face in using the intranet can often be traced to external factors [in our industry]. Fully understanding the retail experience from the perspective of the employee on the floor helps us uncover opportunities to greatly improve the user experience. But this also comes with a need for investment in change management and governance policies that shift the perspective to support employees and managers in the field."

# 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** was previously 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 worked 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, 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.

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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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- Corporate Websites
- Ecommerce UX Design
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