Intranet Design Annual 2017

The Year's 10 Best Intranets

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January 2017

Nielsen Norman Group

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Executive Summary

ORGANIZATIONS

Following are the organizations with the 10 best-designed intranets for 2017:

- **Bank of America, NA** (US), a financial institution offering banking, investing, asset management, and financial and risk management products and services
- **Encana Corporation** (Canada), a leading North American energy producer
- **Goldcorp, Inc.** (Canada), one of the world's fastest-growing senior gold producers
- **Goodwill Industries International, Inc.** (US), a nonprofit social enterprise with a retail infrastructure that funds career services
- **IBM Corporation** (US), a technology, consulting, and research organization
- **JetBlue** (US), the fifth largest airline in the United States
- **Kerry Group plc** (Ireland), provides taste and nutrition technologies and functional ingredients and actives for the global food, beverage, and pharmaceutical industries
- **Latvian Railway: State Joint Stock Company "Latvijas dzelzceļš"** (Latvia), a holding company with six subsidiaries providing railway infrastructure, transportation, construction, repair, and security
- **Santander Group** (Spain), a Spanish banking group that serves more than 100 million customers
- **Tourism New Zealand** (New Zealand), the organization responsible for marketing New Zealand to the world as a tourist destination

Bank of America's winning site focuses on human resources (HR). Bank of America previously won the Intranet Design Annual in 2008. IBM Corporation is also a two-time winner, previously recognized in the 2006 Intranet Design Annual. We recognize repeat winners for their ongoing commitment to building usable intranets.

Finance Makes a Comeback

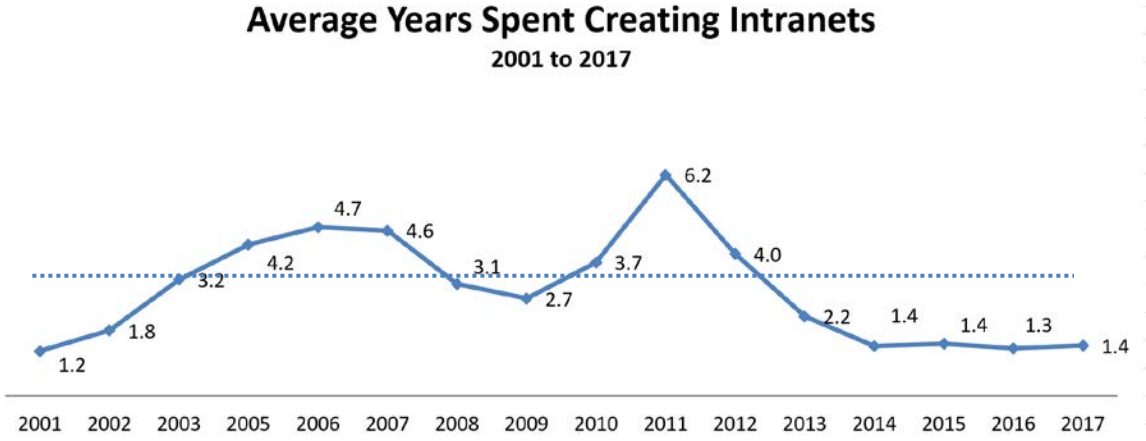
In the early Design Annual years, the technology and finance industries had the most prominent showing. In more recent years, the utility industry has dominated and remains the most winning industry. This year, we have one winner from both the utility and technology industries.

In recent years we had few winners from the financial industry, likely because the financial crisis caused these companies to reduce their investment in internal IT quality. But this year they are back, with two winners.

QUICK, OFTEN ITERATIVE, DEVELOPMENT

Intranet teams continue to be nimble. The average time spent creating a new intranet was just 1.4 years, staying on par with timeframes from the previous three years' winners. For some organizations, it is difficult to even calculate the time for "this" intranet design, as several were part of longer-term iterative planning and development processes.

A switch to faster development strategies (such as Agile) for intranets contributes to these shorter times, as does the continual improvement of intranet platforms and tools that can help teams create solidly designed sites more quickly than ever before.

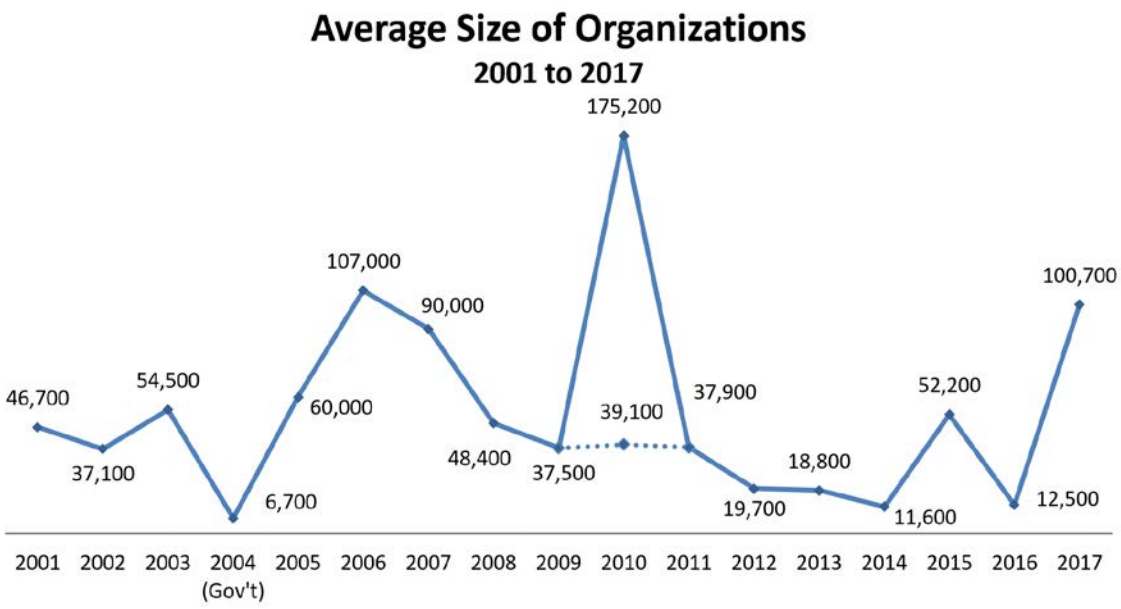


Average Years Spent Creating Intranets: 2001–2017. Since 2001, intranet teams spent an average of three years (36 months) creating their winning designs. In the past four years, however, winning teams spent less than 1.5 years on average creating their sites; this year's average is 1.4 years, or 17.3 months.

LARGE AND SMALL ORGANIZATIONS

This year's winning organizations employ an average of 100,700 employees, ranging from 160 employees at Tourism New Zealand to close to 200,000 for both Bank of America and Santander Group and just over 400,000 for IBM.

This year's median company size is 21,500, with five of the winning organizations employing 20,000 or fewer employees. Four winning organizations (IBM, Bank of America, Santander Group, and Goodwill) employ more than 100,000 people, and Kerry Group employs slightly more than this year's median at 23,000.



Average Size of Organizations: 2001–2017. The winning sites in 2017 supported an average of 100,700 employees, ranging from 160 at Tourism New Zealand to more than 400,000 at IBM. This year's median was 21,500 employees. The high average in 2010 was due to winning organization Walmart's size, with an intranet supporting 1.4 million store associates. The average for that year excluding Walmart was 39,100.

Team Size

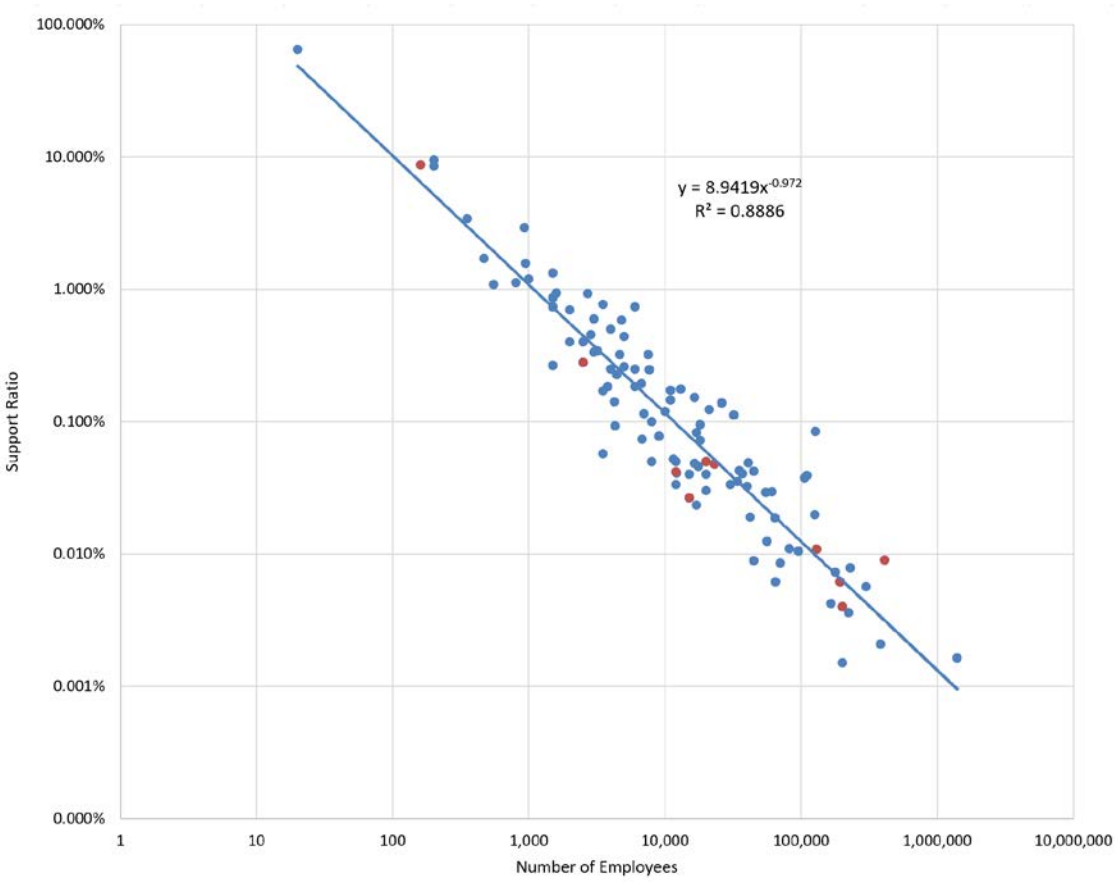
Average intranet team size is reported as 12 people, the fewest since 2008. But this doesn't mean, necessarily, that fewer people can get the job of designing a great intranet done. Rather, this smaller team size is mostly attributed to the fact that organizations did not count external consultants as part of their teams. So the number of the full-time employees that are part of the team may be lower, but the total number of people working on intranets is higher than that.

The following formula can help you determine the best intranet team size in relation to the number of employees the intranet is meant to support:

$$\text{Intranet support ratio} = 8.9419 \times \text{the number of employees}^{-0.972}$$

That is, you take the number of employees the intranet supports and raise it to the power of −0.972. Next, multiply the resulting number by 8.9419 to get the expected intranet support ratio. Multiplying the resulting support ratio by the number of employees gives you the optimal team size.

The equation explains 89% of the variability in intranet support ratios. This effect is visible in the chart below. According to Jakob Nielsen, "It is very rare to get this strong a mathematical model of anything in the UX field. So it's a good finding."



The Intranet Support Ratio Equation. The "*intranet support ratio*" equation—8.9419 × the number of employees$^{-0.972}$—explains 89% of the variability in intranet support ratios. This effect is visible in the chart, in which the numbers are plotted on a double logarithmic scale. Each dot represents a winning intranet. The 10 red dots represent this year's winners.

BRINGING IN OUTSIDE HELP

All 10 of this year's winning organizations looked to outside agencies and consultants to lend expertise to their intranet redesign projects.

On average, organizations hired two outside agencies to assist them in various project stages, including the following:

- Application design
- Branding
- Card sorting
- Content audit and analysis
- Content migration
- Development

- Governance framework
- Graphic design
- HTML and CSS
- Information architecture
- Interviews and user research
- Navigation and taxonomy
- Server setup
- SharePoint assistance
- Strategy
- Style guidelines
- UX design
- Visual design
- Wireframing

Only some of the winning design teams include these external organizations in their total team size; that some don't include them might partially explain the smaller team sizes this year.

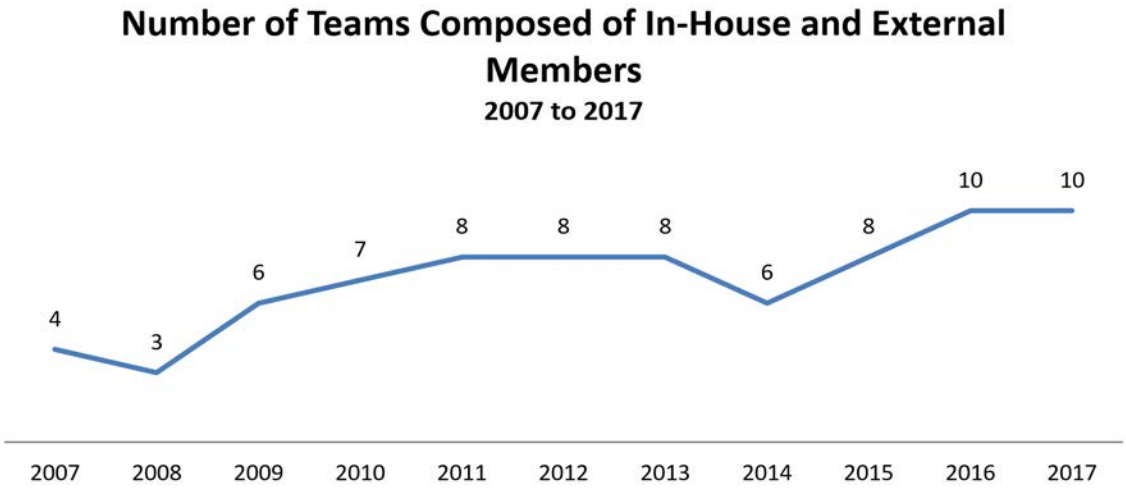
In any case, we've seen growing reliance on outside help for intranet creation. External resources can fill knowledge and expertise gaps on the internal team and add outside experience and perspective.

However, every winning team in the past two Intranet Design Annuals has relied on at least one external resource. This fact left us pondering two questions: *Has intranet technology reached a level of complexity beyond what the average intranet team can handle? Do internal intranet team members lack adequate skills?*

Consider two points:

- We've seen a growing trend toward iterative intranet development and continual improvement.
- Intranets must be governed and maintained.

If external resources are too heavily relied on for a specific intranet project, who then is left within the organization to iterate, maintain, and continually improve the new site? Spending the time and money to train team members or hiring intranet team members with specific skills might be a better long-term investment.



Number of Teams Composed of In-House and External Members: 2007–2017. For the second year in a row, all 10 winning intranets used external consultants and agencies.

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

Overview of the Winners

THE 10 WINNERS IN ALPHABETICAL ORDER	
Bank of America, NA (Financial Services; US)	Bank of America created HR Connect to simplify and improve its employees' online HR experience and to help them take advantage of all the benefits available to them at the bank. A strong site structure, personalized information, and clearly written content combine to create a unified global HR experience.
Encana Corporation (Energy; Canada)	*Consolidated* is the best word to describe ECN, Encana's intranet. With a litany of challenges to overcome, the team focused on short-term goals and wins to help derive an outstanding design. News, tools, and engaging features entice employees to read and participate, while the team's efforts to inventory, audit, and consolidate elements — from the IA to policies — make the design slick and innovative.
Goldcorp, Inc. (Mining; Canada)	Conveyor supports Goldcorp's 5,500 information employees in offices and mines alike, working above and below ground in Canada and Latin America. The site consolidates helpful applications with thorough news and communication, while the polished design gilds the site in more ways than one.
Goodwill Industries International, Inc. (Nonprofit; US)	Transitioning from a site with an overgrown, employee-generated folksonomy to one with a clearly defined taxonomy helped the Goodwill Industries International intranet become a place for employees to share best practices, resources, and information with its numerous local, independent member organizations.
IBM Corporation (Technology; US)	How do you make an intranet work for a half a million workers with extremely varied job roles? If you're IBM, you assemble a large and talented team, push open source to its limits, and improve Agile by creating a dedicated user research scrum team with its own research backlog. Then come up with a winning responsive design that features personalization and flexible cards.
JetBlue (Aviation; US)	Supporting a very strong, positive company culture, HelloJetBlue offers a combination of resources, tools, and news packaged in a friendly, imaginative way. The intranet keeps JetBlue's employees, known as *Crewmembers*, motivated and firmly grounded, even while soaring above the clouds.
Kerry Group plc (Taste & Nutrition/Consumer Foods; Ireland)	The mykerry intranet uses new social sharing and collaboration tools together with robust employee profiles to help employees find information and connect with one another. In just nine months, the team created a SharePoint site that helps employees communicate across five continents and 50 different countries.

Latvian Railway: State Joint Stock Company "Latvijas dzelzceļš" (Transportation; Latvia)	The Latvian Railway intranet provides equivalent information, regardless of device, for all site users. The responsive site integrates a variety of systems, making the intranet a single point of entry to everything employees need to do in the course of a day.
Santander Group (Financial Services; Spain)	A company-wide digital transformation process — combined with employee requests for a modern, innovative intranet — gave this intranet team the perfect opportunity to greatly improve on an already helpful site. The team analyzed employees' habits to further strengthen the previously evolved communication, collaboration, and personalized tools. All of this combined to create an up-to-date, on-brand look that's engaging, with innovatively designed menus that seem to slide from nowhere and generate additional screen real estate.
Tourism New Zealand (Government; New Zealand)	A clean design, rewritten content, and well-integrated social features turned Tourism New Zealand's new responsive intranet into an essential tool for communication and collaboration, regardless of location or device.

COMPANIES AT A GLANCE				
Company	**Headquarters**	**Industry**	**# of Employees**	**Intranet Team Size**
Bank of America	US	Financial Services	Approximately 200,000	**Integrated project team:** ~50 people (internal and external resources) **User experience team:** ~8 people
Encana	Canada	Energy	2,500	7 people (4 operations team/ ecommunication analysts; 3 technical support team)
Goldcorp	Canada	Mining	15,000	**Project team:** 4 people **Day-to-day operations:** 6 people
Goodwill	US	Nonprofit	129,000 (9,500 are intranet users, 65% of whom are salaried, not hourly, employees)	14 people: 6 internal, 8 external
IBM	US	IT	Approximately 411,798[1]	**IBM project team:** 32 people **VSA Partners project team:** 5 people (2 designers, 3 developers)
JetBlue	US	Aviation	19,000	10 people
Kerry Group	Ireland	Taste & Nutrition/Consumer Foods	23,000 (13,000 are intranet users)	11 people (8 internal, 3 external)
Latvian Railway	Latvia	Transportation	12,000 (6,500 are intranet users)	5 people (2 internal, 3 external)
Santander Group	Spain	Bank	193,863	12 people (8 internal,

[1] Year ending December 31, 2015 and broken down as follows: IBM/wholly owned subsidiaries: 377,757; Less-than-wholly owned subsidiaries: 9,577; Complementary: 24,464

				4 external)
Tourism New Zealand	New Zealand	Government	160 (full-time)	14 people (8 internal, 6 external)

INTRANETS AT A GLANCE				
Company	**Intranet Platform**	**Language(s)**	**Mobile Approach**	**Agile Development**
Bank of America	Open Text Portal Platform	English	Responsive web design	No
Encana	SharePoint 2013	English	N/A	Yes
Goldcorp	SharePoint 2013	English, Spanish, French	Responsive web design	Yes
Goodwill	SharePoint 2010	English	Planned for next release/upgrade to SharePoint 2016	Yes
IBM	Custom solution	English	Responsive web design	Yes
JetBlue	Custom PHP application	English	Responsive web design	No
Kerry Group	SharePoint 2013	English	Responsive web design	Yes
Latvian Railway	Drupal	Latvian	Responsive web design	Yes
Santander Group	Liferay 6.2 + SharePoint 2013	Spanish and several other languages	Responsive web design	At certain points in the project
Tourism New Zealand	Office 365 (SharePoint online)	English	Responsive web design	No

Common Themes Among the Winners

Although every intranet team has its own way of working, many of the teams who design great intranets have similar ideas and approaches. Following are some of these overarching commonalities among for this year's winners.

CHALLENGES BE DAMNED

First and foremost, today's best intranet teams have one thing in common: They get it done. No matter what the situation, challenge, or roadblock, these teams make things happen, finding a way to make good design a reality at their organizations.

Intranet teams have always faced great challenges. Some of the greatest challenges this year's teams overcame relate to technology, legacy systems and other enterprise apps, team size, schedule, corporate culture and buy-in, content migration, working with outside vendors, Agile, and distributed teams.

Kerry Group had only a nine-month timeline, including design, sign off, testing, and implementation. The team succeeded by first taking a hard look at the proposed deliverables against the short time frame, then cutting the scope back a bit to meet the deadline.

The Goodwill team was challenged by having to simultaneously learn and implement SharePoint. Further, related miscommunications resulted in it having to switch vendors and delay the project. In addition, Goodwill's previous site content was tagged with 13,000 terms, some of which were spelled incorrectly or duplicated. To address this challenge, the team started from scratch, creating a new taxonomy of more than 1,000 terms customized to Goodwill's vocabulary.

Tourism New Zealand has only one full-time employee to maintain the site; fortunately, the designers were creative in planning for this constraint.

Bank of America worked hard to get buy-in from the organization and entice people to use the new site. The team used a multifaceted approach to ensure an effective rollout and continuing engagement.

Goldcorp dealt with strong negative connotations associated with the previous intranet, including that it was slow, difficult to navigate, and had poor search capabilities. The team secured support and buy-in from across the organization by proving that the new design would truly add value to the business.

IBM faced challenges related to complexity, intranet size, search, and Agile. The intranet is simply too vast to be browsable, but employees' expectation that the intranet search will match the quality of internet searches was a high bar. Further, the company itself is enormous, and the intranet must offer users a reliable way to navigate its many tools and platforms. Also, with IBM becoming an increasingly Agile organization, the intranet team made changes to move to become a more Agile development culture.

The JetBlue team tackled many of its own challenges right from the start — namely, the strategy and development work was separated by a six-month gap due to shifting internal priorities. It also faced complex integration issues with legacy systems, and difficulties in meeting hosting and performance requirements.

Latvian Railways galvanized many stakeholders in an attempt to agree on priorities. Further, data migration from the previous platform to Drupal was complicated, as was the Drupal integration with SharePoint. In addition, much of the team worked remotely using online tools for communication and collaboration, which required considerable ongoing coordination.

Santander faced complexities associated with making the intranet a bidirectional communication channel for employees and the Bank, with the goal of starting and sustaining an active, productive dialogue.

The Encana team overcame probably the most project challenges, including: two CEOs, a lay-off that wiped out much of the project team, a Communications team restructuring, an overall company restructuring, the release of a new corporate focus and business strategy, four different project sponsors, and three different project managers. And yet, through it all, the team found ways to regroup, creatively manage changing resources and project tasks, and lean on smaller project teams and champions to keep the project on track. The new intranet was launched on time and under budget, with strong leadership endorsement.

EXTENSIVE USER AND STAKEHOLDER INVOLVEMENT

You can't make a great intranet without excessive stakeholder involvement. This year's great designers strive to understand the needs of their organization's different teams and individuals. They employ research methods, such usability tests, surveys, and field studies to collect feedback from individuals. Stakeholders are a different story. A series of interviews, meetings, and workshops are needed to truly hear and flesh out stakeholder needs, priorities, and desires. All of this work also builds buy-in and shared goals for the intranet.

The Latvian Railway team met with each department to understand its needs, which fed in to the decisions about organizing information.

Bank of America involved stakeholders and users throughout the process, beginning with a seven-month requirements and design phase. Frequent design critiques, preview sessions, and demo days kept people informed and involved. This ongoing engagement helped the team learn and build buy-in for the new design.

Tourism New Zealand's team built excitement around its new site by including more than 25% of the staff throughout the development process. The team created launch activities to encourage use, highlighted key features, and used newsletters to countdown to launch. On launch day, intranet champions and project team members throughout the organization presented the new site to staff.

Goldcorp developed a clickable, responsive design HTML prototype that made it easy to show everyone in the organization how the new intranet would function relative to the old solution. It was instrumental in generating excitement and buy-in for the new intranet.

AGILE AT ITS BEST FOR THE INTRANET

Today's intranet teams know that they are unique, varying both in size and the roles people play. Many have staff members who work part-time on the intranet and part-time on other projects (typically projects related to IT, the public-facing website,

other enterprise apps, HR, or corporate communications). Some teammates are located thousands of miles apart, with varying responsibilities and time available to commit to the intranet. In these challenging circumstances, some intranet teams have tried to apply Agile methods to the letter — only to find it a losing uphill battle. So, they changed their development approaches to use the best parts of Agile, making the method work for rather than bind them.

IBM improved upon Agile by creating a dedicated user research scrum team. This team has its own backlog of research activities, so it can iterate the designs before moving them to the development sprints. While still part of the process and teams, the people leading the UX have their own short-terms goals to strive for in a realistic, helpful setting.

For Encana, the Agile development model was important because it allowed some team members to focus on incremental, iterative tasks; this empowered the remaining team members to collaborate and make decisions independently, letting them move forward quickly rather than wait for executive sponsor sign-off.

Goodwill used JIRA for cross-team collaboration and held weekly governance and monthly sprint planning meetings. Agile, and the formalization of a governance team, helped the intranet team be transparent and accountable to each other and to constituents.

Goldcorp used Agile to create a clickable prototype for testing and communication, thereby working out many kinks in the design before coding began.

In lieu of Agile, JetBlue used a modified Waterfall, adding an initial discovery and strategy phase in which it surveyed 2,300 employees, interviewed key stakeholders across departments, and performed audits of content and functionality.

CONSOLIDATION: INTEGRATED AND LINKED ENTERPRISE TOOLS AND CONTENT

Since we began studying intranets, a common goal for new intranet designs has been to unify disparate systems. These systems might be multiple intranets, one intranet with many silos, or various enterprise apps that are not meeting the organization's needs. This year's winners stressed the theme of consolidating many organizational systems in order to offer the same high-quality applications in a single location for all employees.

In tackling this auspicious goal, most intranet designers struggle with a question: *What should be part of the intranet, and what should simply be linked to from the intranet?* Creating content and tools that are part of the intranet provides many advantages, including that it

- Gives teams more control over what is offered
- Makes it easy to provide a consistent user experience (UX) across all tasks and features
- Lets you name links by task and avoid the unnecessary branded terms and marketing-speak used in third-party applications
- Results in easy maintenance

- Offers the possibility of fewer single sign-on issues

On the other hand, having the intranet simply serve as a portal to other enterprise solutions — or even to public-facing websites — offers its own advantages, including that it

- Saves development costs as existing tools can address user needs
- Provides the expertise of third-party vendors to tweak or develop the tool
- Includes maintenance (and even support can be easier when outsourced)
- Offers tools that might already be in use by many employees, saving on training and other costs

Most of this year's winning teams do not have a true policy for linking to versus integrating applications and tools. (One reason for this is that many intranet teams are often not even privy to which tools are being purchased by people on various teams and/or by IT and procurement groups.) Instead, they make case-by-case decisions about which elements to link to and which to develop.

Latvian Railway integrates several different systems from around the organization, supporting tasks ranging from inventory to vacation planning to ordering printer cartridges. The intranet also integrates with SharePoint, an internal knowledge base (Latvijas Dzelzceļš), and JIRA, which helps with business processes.

Encana took many disparate systems and information peppered throughout the organization and consolidated them all into a single location that makes sense.

Kerry Group's intranet provides a single point of entry for information and productivity applications across the entire organization. It integrates with SAP and Active Directory for employee details, and automatically populates the intranet's career opportunities section with open jobs from the recruitment system. As Kerry Group acquires businesses around the world, the new site helps integrate new businesses and employees, and connect people with their colleagues across the world.

For Goldcorp, the company's shift to Microsoft Exchange Online for email provided an opportunity to integrate email and calendars with some portal elements, providing a more cohesive experience between the two integral communications tools. Employees can access various tools on and beyond the intranet and SharePoint. All of these applications are consolidated in one area and can be sorted, filtered, and searched, making it easy to find the right one.

Bank of America offers a single point of entry and simplified sign on that controls security access points; once users are signed in, they have easy access to other bank sites and resources. Information that was previously scattered throughout the site is now consolidated.

Likewise, Santander's portal links to more than 100 banking applications, accessible through the user's customized links or by searching apps.

JetBlue integrated elements such as metrics, SAP (for user info), LDAP (for user authentication), photos from its badge photo system, stock price, and social feeds.

The team also linked to elements such as legacy tools that still exist on other web properties.

For its part, IBM created criteria to help it drive its decisions about whether to include or link to elements:

- **Task independence.** If the tool supports a step in a larger workflow, it is a strong candidate for integration.
- **Usage.** Business-critical and commonly used tools are stronger targets for integration.
- **Business strategy.** Tools that are business critical get a stronger review for integration.
- **Technical challenge in integration.** For practicality's sake, if integration is too large of an investment, IBM might decide against it.

Clearly, this list can offer solid guidance for many teams.

NOT JUST RESPONSIVE — MUCH BETTER

Intranet designers are inspired by the growth and innovation of responsive web design. They also realize that their work has a more powerful impact because mobile devices are now a regular part of all employees' lives. We're not talking about making just a few "on-the-go" work-related tasks possible for employees with company-approved devices. Rather, at many organizations, the only option is BYOD (bring your own device), and IAF (include all functionality) is the way of today on intranets. These concepts bring with them greater opportunities to support employees — all the time and everywhere.

For example, JetBlue's responsive intranet helps all types of employees — from pilots flying a plane full of customers high in the clouds to flight attendants grounded and boarding customers to gate agents mastering many tasks — using whichever device they need to and still being connected to the mother ship. IBM supports an incredibly varied workforce in almost any situation you can imagine, all using phones, tablets, or computers, or some combination of these. The Latvian Railway has greatly improved communication with its employees. In the past, employees without regular computer access received information via a print journal, or did not receive corporate information at all. Now all employees access the full intranet on desktop or mobile devices.

For Goldcorp, mobile use is crucial for many employees, so designers took great care to make each page appropriate and easy to use on desktop, mobile, and tablet. They also made many changes in the user interface (UI) to accommodate the different devices, including smart features, such as the ability to start work offline. For example, an application for employees working in a mine can work underground where there is no internet connection, then sync content with the intranet when they resurface.

The IBM intranet uses "cards" to gather like information into easy-to-manage containers. Cards are organized by topic and are not tied to a single source of information. Using this approach, the design team was able to integrate related content and resources from multiple sources into a single card. Santander, similarly,

offers flexible templates so communicators can present content to employees in the best possible layout, rather than having to stick to limited page templates.

NAVIGATION DERIVED FROM USER RESEARCH

Intranet teams are deep diving in to the vast pools of navigation links and truly cleaning up the offerings. Some design teams choose topic-based navigation and name the links based on user tasks. All teams strive for understandable language and categorization, and let user feedback drive good navigation design. To develop its task-based navigational structure, for example, Bank of America started with a content inventory and followed it with assessment, card sorting, and tree testing of the resulting categorizations.

PLANNED GOVERNANCE

Three groups often own or greatly influence intranet designs: Corporate Communications, IT, and HR. Intranet teams almost always work closely with these three teams and the resulting partnerships lead to varying governance models. No matter who owns it, however, the intranet must be monitored, maintained, and improved. The best intranet teams form governance models that plan for maintenance in a systematic, expected way.

Encana found that governance provided a strong foundation; it expended considerable effort to develop a governance framework to help manage and maintain the intranet. Bank of America has a well-defined governance structure that involves regular updates with HR leadership. HR designees representing each line of business review changes and offer input about the best way to communicate to the lines of business and unique employee populations.

At Goodwill, the intranet is owned by the Governance team, which is composed of digital/knowledge management and IT leaders. This placement has positively impacted understanding and processes, and has strengthened communication channels.

At IBM, the Workplace as a Service domain (a department within the CIO) owns intranet strategy and experience, and partners with organizations across the company (such as Corporate Communications and Learning) to create the intranet. The team is united in a few cogent ideals, the first being that a successful intranet experience should support the needs and wants of IBMers today and have a clearly defined roadmap for tomorrow.

At JetBlue, Corporate Communications owns the intranet and continues to prioritize improvements with a biweekly release of updates. The ownership team centralizes the storage of all resources, links, and internal communications. At Latvian Railways, the Communications department and the internal IT department own the intranet. Their content model is distributed; for example, the legal department can publish new versions of documents, and HR can publish HR-related content. The Santander intranet's main sponsors are the Corporate Communication Team, along with Corporate HR, Team and Corporate Organization Team. This collaborative relationship has been positive for the intranet.

Kerry Group's intranet is owned by its businesses and sponsored by the Group's most senior executives. ICT, Communications, and HR own intranet development

and administration. All requests and requirements are reviewed appropriately and scheduled for delivery depending on the priority they are assigned by the group.

Tourism New Zealand's intranet is owned by the Corporate Affairs team, which has skills in communications, technology, business, usability, and information architecture (IA). Three team members played the parts of business owner, project lead, and communications/user adoption lead, respectively. The intranet governance group also includes representatives from the HR, IT, and Digital teams.

Feature Trends

PERSONALIZED ELEMENTS: DASHBOARDS, HOMEPAGES, AND MENUS

Knowing that quick answers and necessary alerts are welcome features, all of these great intranets provide a homepage or a dashboard-like page that is personalized to and customized by each employee. These pages are like control centers that employees can scan to find everything from tasks to take care of to news they want to read. Bank of America, Goldcorp, IBM, and JetBlue all included these helpful options.

Similarly, Encana's *Top Tools* menu provides a clever way to consolidate the many favorites lists that teams so often create, giving employees important tools in a systematic way. On Santander's intranet, roles dictate everything from menus to search results, and employees can easily add the many banking applications to their bookmarks.

Tourism New Zealand's systems and tools menu consolidates top tools under an icon accessible from every page.

Bank of America's intranet targets information, resources, and tools according to region, country, and line of business for each individual. Further, employees in the US can see a detailed summary of their benefits information, pay, retirement and savings, insurance, and more in a single dashboard view. The project roadmap includes plans to expand this offering internationally, tackling the challenge of dependencies on many decentralized data sources across countries and regions. Bank of America's intranet also uses impersonation, which lets support personnel impersonate users in order to test functionality and troubleshoot, all while protecting confidentiality. In addition, a super-impersonation tool allows a limited number of support personnel to see confidential data on the site from the viewpoint of different users.

At IBM, ensuring that employees had quick access to key intranet areas was a priority for designers. Personalization helps tremendously with this, as it suggests topics employees need based on their role. Customization can also be helpful — as long as people realize it will be worth the effort required. In other words, the perceived benefits of customizing must be higher than the cost of customizing.

MEGAMENUS ON DESKTOP, COLLAPSED MENUS ON MOBILE

Megamenus are still one of the best UX patterns for representing and quickly displaying navigation choices. Megamenus have been popular on intranets for several years, and remain popular among this year's winners on desktop and usually for tablets as well. The phone interface typically collapses the global navigation under a button to deal with the smaller screen real estate; when opened, these menus expose vertically.

Encana and IBM offer large menus divided into sections by topics. Bank of America, Santander, and Tourism New Zealand all offer tab-like top-level commands that open a wide megamenu organized in columns. The phone collapses the menu under an icon.

We also saw many always-present icons and buttons that link users to top tools and information panels, as on the Santander, Latvian Railways, and Tourism New Zealand's intranets.

GRAPHIC-FIRST

Images and illustrations are used in a restrained way on this year's best intranets. Colorful, rich photos (as on the Tourism New Zealand and Santander intranets) engage employees. But subtle, simple icons (as on the IBM and JetBlue sites) also hold their own on pages.

Rather than filling blank space, this year, images seem to drive the page content and hierarchy. Designers and content authors are taking a thoughtful, disciplined — perhaps even "graphic-first" — approach to using graphics.

FOOTERS THAT ARE "NOT SO FAT"

A footer helps people for many reasons, mainly because it appears on all pages and is thus available when people need it. Links in a footer are often the user's last try before calling support, asking a colleague for help, or just plain giving up.

Intranet footers have been expanding vertically for the past five years. This year, however, several footers dieted down to a skinny rail, as on Goldcorp, IBM, JetBlue, Latvian Railways, and Tourism New Zealand. These intranets trade the screen real estate a fat footer might use for other content; they also offer persistent top navigation, so people can return to those categories or use search when page content isn't enough.

Still, fatter footers are often quite warranted, as on the Goodwill, Kerry Group, and Encana intranets. These occupy expanded vertical space and house helpful elements including: a repeat of the navigation menu, interesting cultural sentiments, social links, recent headlines (dynamically pulled from the news archive), current external news releases, press releases that appear on the public-facing site, quick links, popular search terms (based on web metrics), and dynamically updated stock tickers.

FLAT 2.0: "FLATTISH" DESIGN AESTHETIC

The winning intranets this year take on some elements of minimalism and flat design, and embody "Flat 2.0" — also known as *flattish* design. These designs take on aesthetic elements of flat design, but also mingle in clear signifiers that help increase affordance and make clickable elements look clickable. For example, a design might have clean-cut corners and lines delineating page sections, looking very flat, but also have subtle bevels or shadows behind button borders. Or an intranet may use a slightly fancy gradation in menu and button backgrounds, but no shadowing on button borders.

In these designs, it's obvious that teams revere not just aesthetics, but also usability. None of these teams worship at the altar of trendiness. They do what looks good *and* works well for their employees.

AUTHOR SUPPORT

An intranet is only as good as its content. These winning teams support their authors with tools, training, status updates, and professional development.

Goodwill's intranet team supports the authors with guides for writing and selecting photos, and through regularly scheduled training and meetings to improve writing skills. Likewise, Kerry Group respects its writers' abilities and encourages them to approach writing more as a matter of professional development and less as run-of-the-mill content uploads.

JetBlue built a custom content management system (CMS) for maximum flexibility. The CMS also offers content administrators increased efficiency, such as when hiding fun features on pages with serious topics.

EMPHASIS ON SEARCH

Speedy search has been an intranet focus for years. But this year, teams took it to another level, looking at every aspect of search, including

- Finding the search feature
- Getting results after typing just a few letters
- Crawling everywhere a user may need to be looking
- Running the query at lightning speed
- Returning relevant and well-described results

Tourism News Zealand's "instant search" gives employees immediate answers.

IBM's rapid results search system is personalized, provides immediate "best bets," and pulls from several data sources and services.

Goodwill's user research showed that intranet information was simply too hard to locate. In response, the team worked to improve the efficiency and effectiveness of the search and increased the visibility of the search function.

MULTI-LANGUAGE

Winners provide content in the languages of their employees' choice. This accommodates all employees, ensures they understand important information, and fosters a feeling of acceptance and inclusiveness. For example, Santander's intranet is available in Spanish and multiple other languages depending on the country in which the employee is based. Goldcorp's intranet is available in all three languages spoken at the organization: English, French, and Spanish. If users work in an English-speaking location but wish to view the site in Spanish, they can change the language for the global content.

TRACKING USAGE TO IMPROVE BEHAVIOR

For the first time in our Design Annual's history, teams noted that they are tracking employee usage and then contacting individuals to improve the experience. Goodwill tracked who used and did not use the intranet. Those who didn't use it were then made aware of how the intranet could help them, and they were encouraged to use

it. Similarly, Latvian Railway's intranet tracked how long it took people to complete certain processes. The team then followed up with people to offer targeted troubleshooting and training as needed.

CONNECTING WITH SOCIAL, AND ELIMINATING SOCIAL SILOS

Social tools continue to evolve on intranets, with a focus on making content searchable or findable and encouraging use through interesting topics and creative methods.

IBM lets people comment, share, bookmark, and like content directly from the intranet homepage. Kerry Group encouraged participation in social by using an informal tone, getting leadership involved in creating and reacting to content, and running a "Let's Get Social" campaign to increase awareness. Tourism New Zealand encouraged storytelling by integrating Yammer throughout the intranet.

Best Practices for the Intranet Design Process

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

For the past 15 years, we have seen intranet design patterns across case studies of award-winning intranets, as well as in our intranet research work for clients and our other NN/g reports. Specific steps exist to create intranets that meet user needs. Screenshots and features might inspire you, and case studies might educate and inform, but without a good design process, it is difficult to create an outstanding intranet.

Here we offer a few of the most important recommendations for designing a usable intranet.

BASIC STEPS TO A GREAT INTRANET DESIGN

Successful teams take several common steps to create great designs; those steps include the following:

1. Stakeholder involvement at the start
2. Discovery
    a. Analytics review of the current intranet
    b. Inventory and audit of tools and applications
    c. Review of and planning for resources and intranet development
3. Field studies and usability tests of current systems with employees
4. Intranet goal setting
5. Persona creation and sharing
6. Ongoing stakeholder interviews and workshops
7. Iterative design and ongoing usability testing with users
8. IA and content research and creation
    a. Content inventory
    b. Content audit
    c. Card sorting with stakeholders and users
    d. Design iterations
    e. Tree testing of categories and links
9. Content strategy
10. Support, training, and ongoing enrichment and rewards for authors
11. Sustainable governance model

12. Promotions before, during, and after launch (or launches, in an Agile world)

CONSIDER INCREMENTAL FEATURE ADDITIONS

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

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

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

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

USE SOCIAL TO LEARN

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

Take advantage of social information by analyzing it for more than what it can teach you about intranet design. Use it to improve the organization and the satisfaction of employees, too.

PLAN FOR MOBILE FROM THE START

Make decisions about optimizing for mobile access and desktop from the start, including how you will do it and which devices you will target. Teams today almost always choose a responsive approach to accommodate all display sizes, rather than pigeonholing people to a particular device. Regardless, ensure that you plan, prioritize, and test features and content throughout the design process so the UX is optimized for all of your targeted devices.

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

WATCH EMPLOYEES WORK

One of the great benefits of working on an intranet is that your users are all around you. They're the people you pass in the hallways, the employees sitting next to you in the cafeteria, and the staff members who park next to you in the garage. Use these interactions to your advantage and ask to watch how your colleagues work. Observe how they naturally use (or don't use) the intranet, and where design opportunities exist for making it a more useful part of their day-to-day tasks.

Although they are your colleagues, people have different organizational roles that entail different intranet needs and require access to different types of information.

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

USE SITE ANALYTICS

Set goals for the types of analytics you want to capture on the intranet, and then capture that data *before* the new project begins and *after* launch. You can then compare it to data captured once the redesign is complete. Keep up with analytics; they are powerful numbers and can support (or disprove) the hypotheses you derive from behavioral user research.

CONDUCT USABILITY RESEARCH

Remember: you don't need a complete, finished design to garner useful usability feedback. In fact, it's better to get early feedback on incomplete designs. Test with wireframes, prototypes, and even paper mockups. Or, if you want to introduce design elements similar to those you see on a particular website, use that website to test the features. You can watch people using any current system, even if it's not an intranet, to determine which features or elements are well designed.

Even the busiest development teams, or those with the craziest deadlines, should take time to watch people attempt basic tasks using the design. It doesn't take long to do a quick test. We encourage design teams to get a group of designers and developers together — even for just 20 minutes — to review a site's design, discuss what happened in testing, and then identify, discuss, and agree on the top usability issues.

SUPPORT THE LAUNCH OF A NEW INTRANET

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

- Include key players from around the organization in the design process. These people not only help you generate design and feature ideas, but can excite their groups about the coming new intranet.
- As you develop the new design, consider making iterations of it accessible to employees (on a staging server) and then encourage their feedback. Explain the major changes and highlight the benefits.
- Include usability and beta testing in the design and communication processes. Follow up the usability research by communicating how user behavior and feedback helped steer design changes. (But don't use the testing sessions themselves to convince people that the intranet is better; these sessions are best used solely for research and analysis.)

- Designate staff members to respond to employee questions and comments for the first few months after launching a new design.
- Stage events, contests, and promotions on the intranet itself and in other places to describe new features and processes.
- Keep promoting for a few months after launch; some employees may not have time to explore the site right away.

UNDERSTAND THE TECHNOLOGY

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

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

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

PERSONALIZE AFTER YOU CREATE THE INFRASTRUCTURE

Personalizing the intranet can help people find what they want and expedite work. Hiding things people don't need can also have positive effects by eliminating clutter and overload. However, personalizing is about more than designing the interface; it also involves designing systems for collecting and tracking timely information about people. This process typically involves HR and other departments, and sometimes many databases as well. In short, it can be a lot of work and involve legacy systems and half-organized data consolidation.

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

HELP CONTENT CONTRIBUTORS SUCCEED

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

The most welcomed intranets are those with fresh information that people need and want. One way to keep information updated and interesting is to provide methods for employees to add and edit information. Allowing people — in addition to designated content providers — to contribute content gives them a stake in the intranet's success. Such efforts invariably produce compounded returns. Fostering excellent

content providers results in better content overall, which leads to more varied and useful information, which drives more employees to the intranet, and thus ensures that the intranet remains a business-critical tool.

CONSIDER ACCESSIBILITY

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

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

MEASURE ROI

When embarking on any intranet redesign, measure whatever you can. To show some kind of return on investment in the new site, you need to have starting values against which to measure.

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

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

Consider other ROI measurements as well:

- Do collaboration tools or stories about individual projects or employees result in new work sold, new solutions found, or new collaborations across the organization?
- Do idea boards result in more efficient processes and savings across the organization?
- Are networking tools promoting collaboration and improving team dynamics?
- Does automating a process on the intranet free up time for the department previously responsible for that task?

- Does providing essential tools and information take employees' less time than finding the same information on their own?
- Does enabling online communication or meetings decrease travel costs and time compared to in-person meetings?
- Does moving information online reduce printing costs?

GOVERNANCE: PLAN TO MAINTAIN AND ENHANCE THE INTRANET

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

Intranet development shouldn't be viewed as a finite project, but rather as a continual process. Governance teams should meet. Resources should be budgeted. Content creators should be supported. Site structure and content should be audited and reviewed. Search tools should be enhanced. At the end of a redesign effort, much work remains to be done.

Bank of America, NA

OVERVIEW

COMPANY

Bank of America is one of the world's leading financial institutions, serving individual consumers, small- and middle-market businesses, and large corporations with a full range of banking, investing, asset management, and other financial and risk management products and services.

Headquarters: Charlotte, North Carolina, US

Company locations: The company serves clients through operations in all 50 US states, the District of Columbia, the US Virgin Islands, Puerto Rico, and more than 35 countries.

Locations where people use the intranet: The intranet is available worldwide to all Bank of America employees.

Annual revenue: N/A; for information, see www.investor.bankofamerica.com

THE INTRANET

Users: Approximately 200,000

Mobile approach: The site was built explicitly for responsive mobile design; mobile usage will grow significantly in future releases.

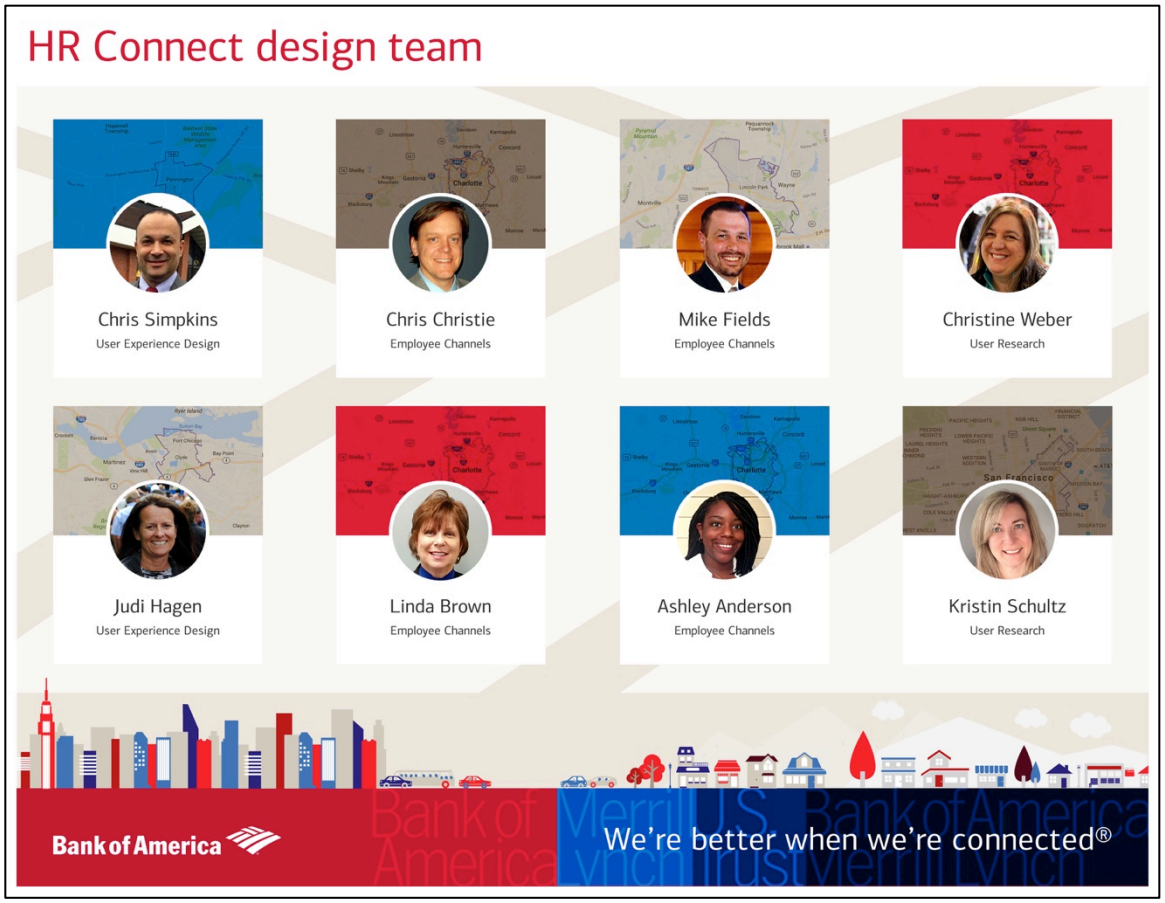
Technology platform: Open Text Web Experience Management

TEAM

Design team: An in-house UX team of approximately eight people designed the front-end, including the UX, user research, and branding.

Members: Chris Simpkins, UX Design; Judi Hagen, UX Design; Chris Christie, Employee Channels; Mike Fields, Employee Channels; Linda Brown, Employee Channels; Ashley Anderson, Employee Channels; Christine Weber, User Research; Kristin Schultz, User Research

INTRANET TEAM



Team members shown here (top row, left to right): Chris Simpkins, Chris Christie, Mike Fields, and Christine Weber; (bottom row, left to right): Judi Hagen, Linda Brown, Ashley Anderson, Kristin Schultz.

HIGHLIGHTS ABOUT THIS WINNER

HR Connect grew out of the need for an integrated HR portal that gives employees quick access to information and content, as well as offers a pathway to all needed HR tools and transactions. Prior to HR Connect, Bank of America's intranet, Flagscape, offered HR information to the company's 200,000 users in 35 countries throughout Europe, the Middle East and Africa, Asia Pacific, and the Americas. However, in some cases, HR information was difficult to find and was not personalized, making it hard for particular employees in specific locations to find relevant HR content.

The eight-person in-house team led the initiative to streamline information and delivery, adopt personalization, and create a responsive design that would quickly and easily deliver relevant information to employees. The resulting site has made huge strides in improving employees' online HR experience by providing the following:

- **A single point of entry and simplified sign-on.** Information that was previously scattered throughout the site is now consolidated. The content is organized in a task-focused navigational structure with easy access to relevant information. A simplified sign-on also controls security access points; once users are signed in, they have easy access to other bank sites and resources.
- **Personalization.** Employees are connected directly to the right information, resources, and tools, which are targeted by region, country, and line of business for each person. Further, US employees see a detailed summary of their benefits information, pay, retirement and savings, insurance, and more in a single dashboard view. The project roadmap includes plans to expand this feature internationally, tackling the challenge of streamlining dependencies on multiple decentralized data sources across countries and regions.
- **Impersonation.** Impersonation allows the site's support team to temporarily assume the identity of specific users to test functionality and troubleshoot, while still protecting confidentiality. In addition, a super-impersonation tool allows a few authorized support personnel see confidential data on the site from the viewpoint of different users.
- **Task-based navigational structure.** The team started with a content inventory and assessment, followed by card sorting with 85 employees and 85 managers. This resulted in five main categories that influenced the final IA. After reviewing best practices and conducting tree tests, the team finalized the megamenu, which presents clearly named and organized options to users.
- **Colleague involvement.** The team incorporated users, stakeholders, and subject matter experts (SMEs) at each step of the project, starting with a seven-month requirements and design phase. The iterative process included showing visuals and reviewing requirements along the way, so SMEs could picture what the UI would look like. This helped requirements discussions move more quickly. Continual design critiques, preview sessions, and demo days kept employees and stakeholders informed and involved throughout.
- **Consistent experience.** The templated design gives people a predictable experience across the site. The design allows enough flexibility for content teams to alter the layout and visual design, while still maintaining overall consistency. The streamlined system also allows for easier content maintenance and governance.

BACKGROUND

HR Connect is housed within the Flagscape enterprise intranet. Prior to implementing HR Connect, users did not have a connected end-to-end online experience. The site lacked a single point of entry to HR tools and information. Additionally, this information was often difficult to find and not personalized for the employee. The objective with HR Connect was to deliver an integrated HR portal that would give

employees quick access to information and content and a pathway to all relevant HR tools and transactions.

The tool was designed to make employees' work easier and help them take advantage of all the benefits available to them at the bank. It also fits into the company's strategic plan by delivering a unified experience across the global HR online ecosystem, and simplifies and improves the employee's online experience.

With more than 100 stakeholders and core team reviews, it took approximately seven months to complete the requirements/design phase of HR Connect. The primary question and challenge of the redesign was**:** *How can we make the lives of employees easier by aggregating all HR content into a single location, so it is readily accessible, relevant, and easy to understand and navigate?*

The design team used an iterative approach to determine requirements and create the design. It enlisted SMEs to help them visualize what the UI could look like. "We found that having visuals to go along with the requirements discussion helped us move through this phase with our stakeholders faster than typical requirements gathering," says User Experience Design Specialist Christopher Simpkins. "There were approximately 100 SMEs with whom we had to gain buy-in, and they represented all areas of our HR and technology landscape."

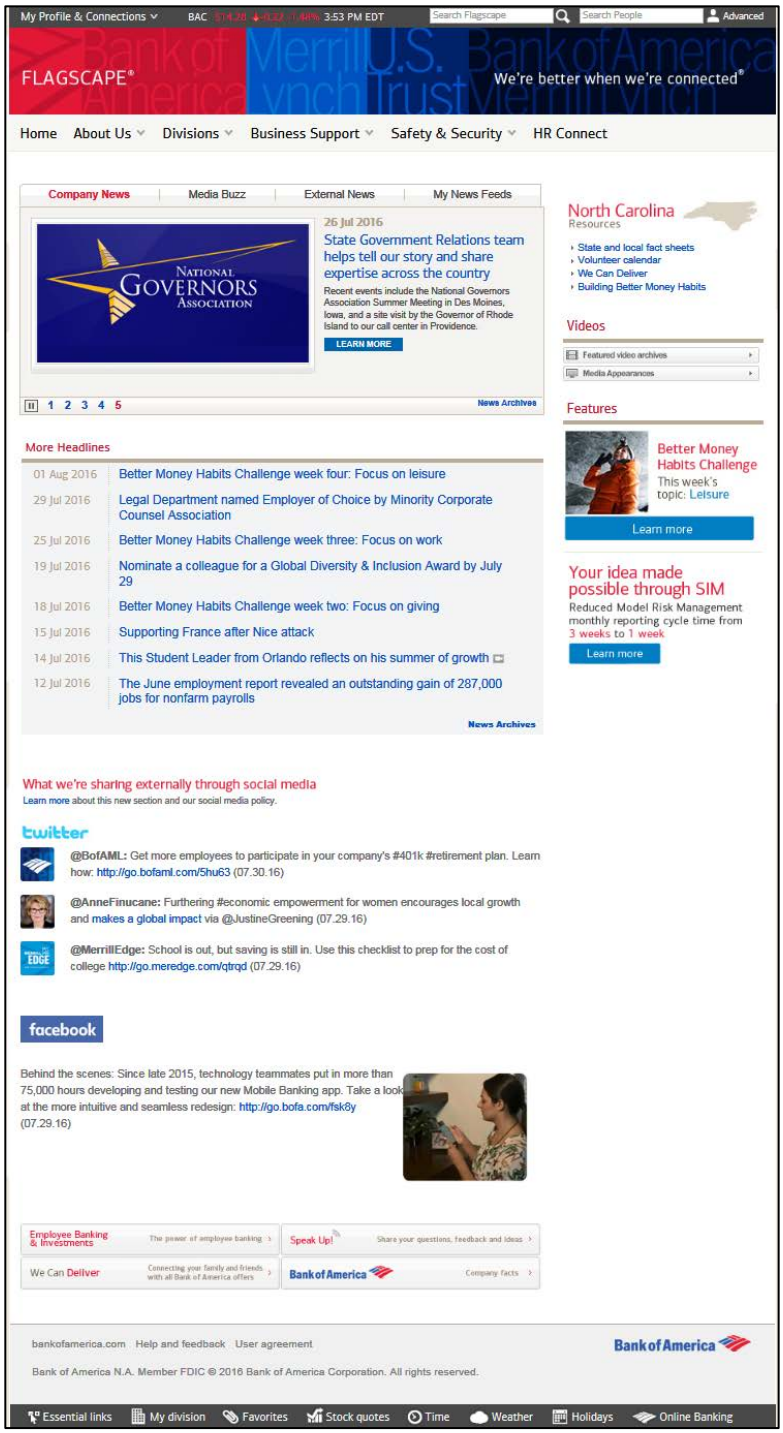


Image 1. Bank of America Flagscape Homepage. Flagscape is the company's corporate intranet. The link to HR Connect can be accessed from the global navigation (far right tab) or from the *Essential links* in the toolbar at the bottom of the browser window. *BankofAmerica_01_Flagscape_home_live.png*

DESIGN REVIEW

Homepage

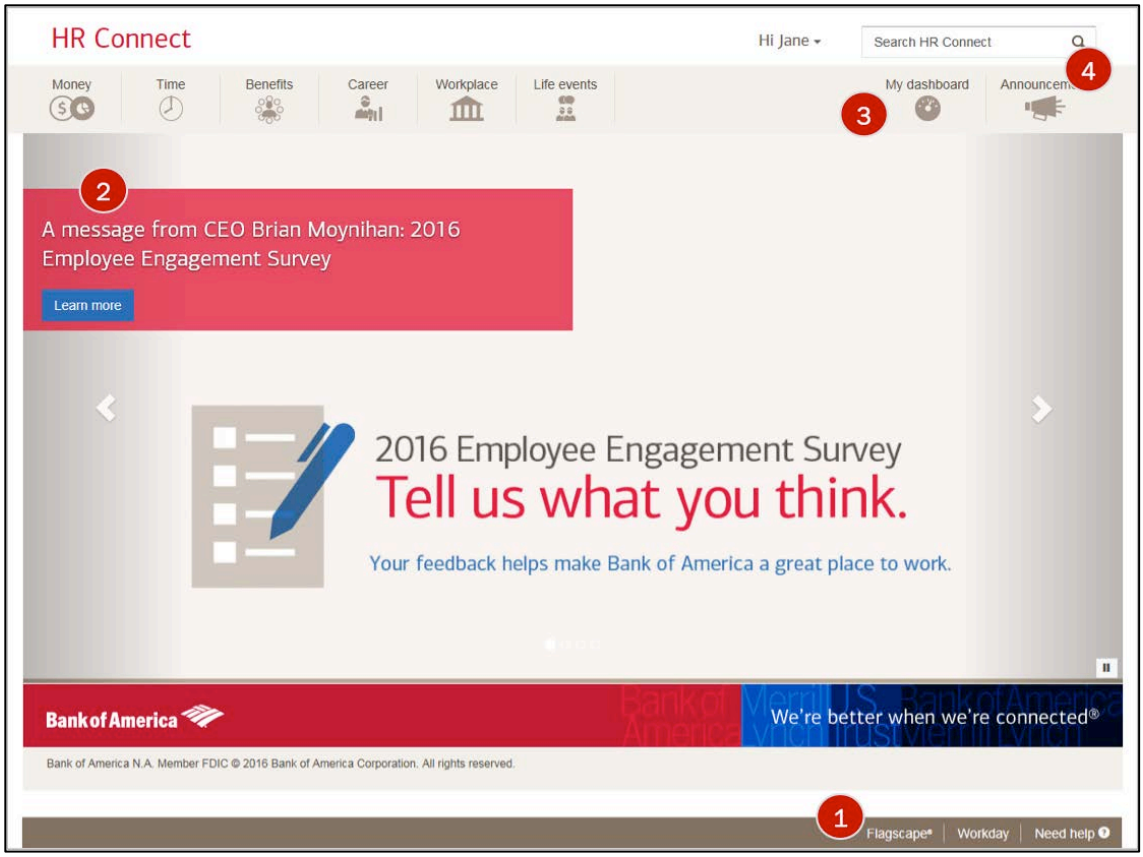


Image 2. Bank of America HR Connect Homepage.
BankofAmerica_02_home_live.png

Homepage Highlights

1. **Easy access.** Employees access HR Connect via a link on Flagscape, the company's main intranet. They can return to Flagscape via a link at the bottom of the HR Connect site, where they can also access the transactional HR site, *Workday*, and support information (via *Need help?*).
2. **Timely information.** The homepage communicates important or time-sensitive information, with a carousel that features up to five messages at a time. Employees can navigate through the carousel via forward and back buttons, and pause it as needed.
3. **Dashboard access.** Early user testing showed that people liked having their personal dashboard as the homepage, but the homepage also had to include HR and general company information. Additionally, only US employees currently have access to the dashboard. Thus, the dashboard link was placed prominently in the design, in the upper right corner, making it easy to find.
4. **Search.** The search, which is specific to HR Connect, appears in the top right corner of each page of the site. The text field includes the filler text *Search HR Connect* to indicate the tool's scope. The magnifying glass icon makes it easy to submit the query.

Megamenu

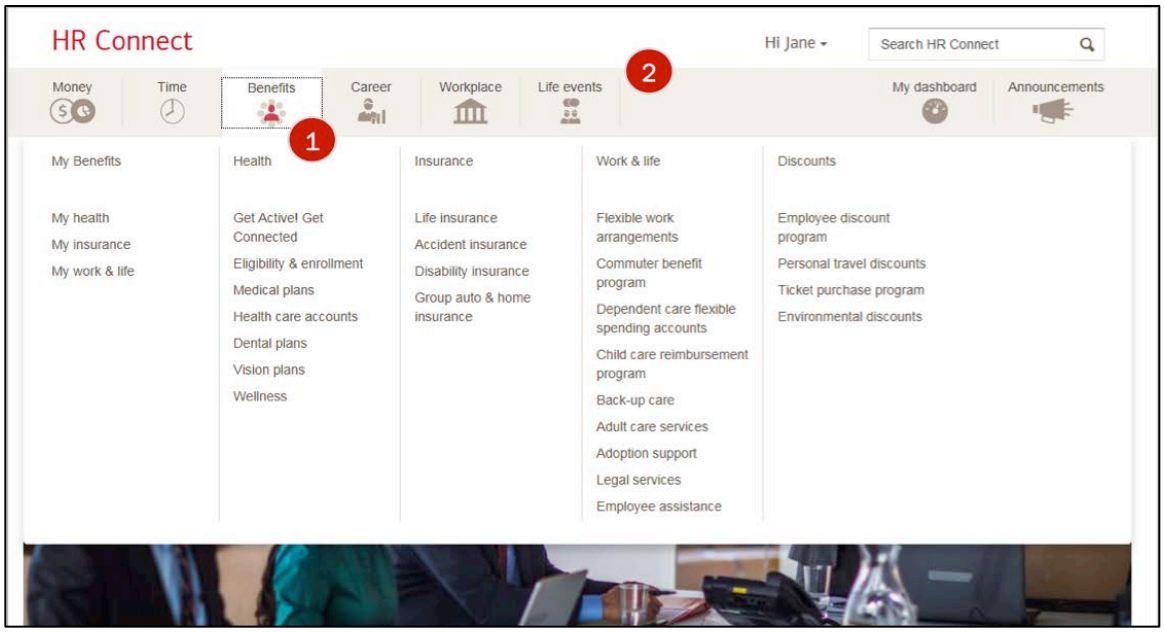


Image 3. Bank of America HR Connect Megamenu. On this HR Connect homepage view, the *Benefits* megamenu is expanded to show the targeted content for this particular user.
BankofAmerica_03_home_benefits_menu_live.png

Megamenu Highlights

1. **Megamenu design.** The site's megamenu design gives people an overview of each navigation section and provides quick access to content. The menu indicates which section is currently selected using a white background and red highlight**.** Secondary categories appear at the top of each column of links, with clear differentiation between the categories. All content can be accessed via the megamenu.
2. **Categories.** Card-sorting exercises led to the site structure, which includes the categories *Money*, *Time*, *Benefits*, *Career*, *Workplace*, and *Life Events*, with additional access to *My dashboard* and *Announcements*. The megamenu was limited to only six primary categories to avoid clutter. Each category name is accompanied by an icon, part of which turns red when the category is selected. Also, category names are user-focused: all services and benefits are named according to their purpose, rather than their brand. For example, *Life Insurance* is listed as just that, rather than as the name of the insurance provider. This not only helps people easily find the right information, but also avoids navigation changes if the providers change.

Personal Dashboard

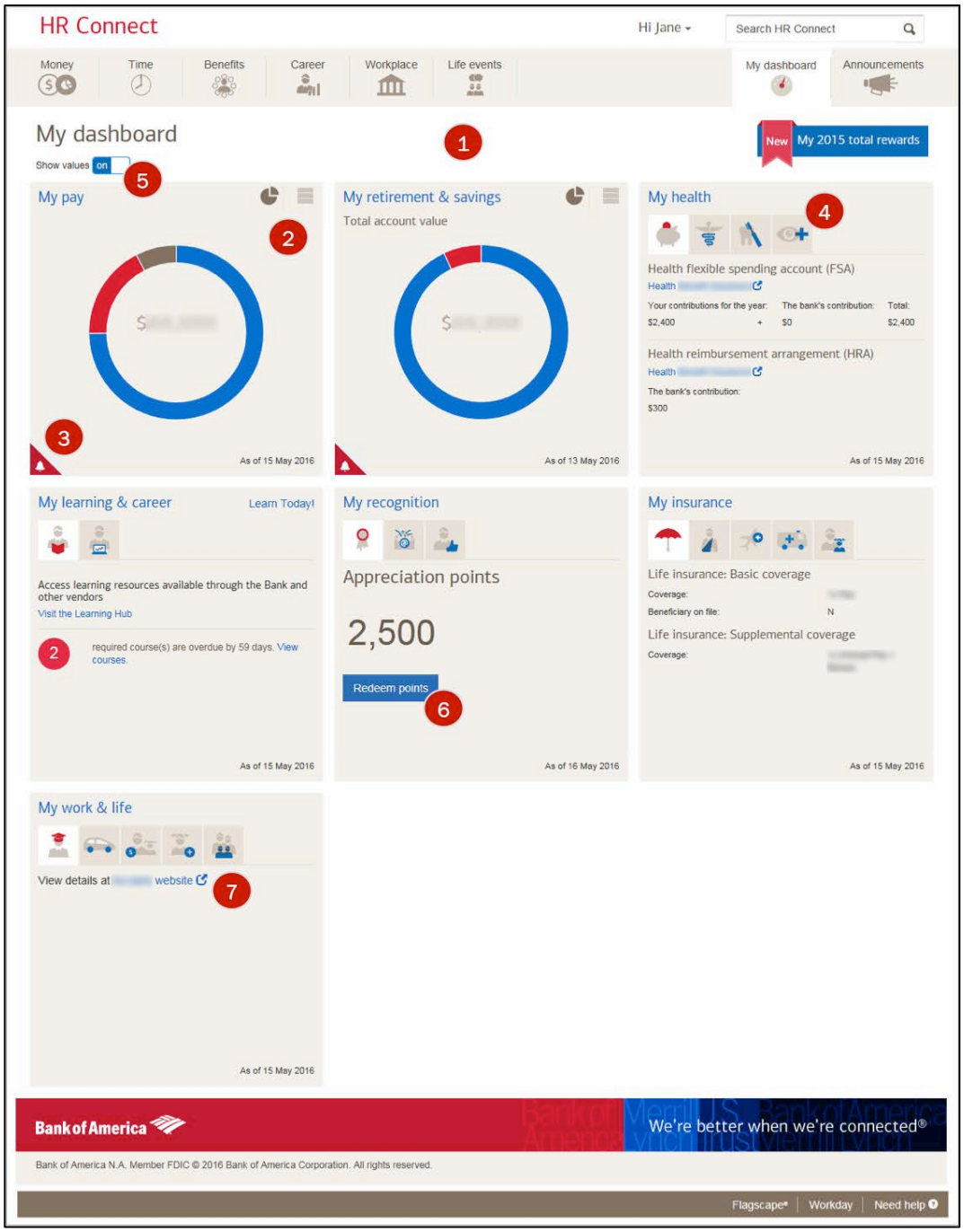


Image 4. Bank of America HR Connect *My Dashboard* Page. A personalized summary of an employee's information. *BankofAmerica_04_dashboard_valuesOn_live.png*

Personal Dashboard Highlights

1. **Snapshot of information.** All US employees can access a personal dashboard. This view of benefits information summarizes details about pay, retirement and savings, health, learning and career, recognition, insurance, and work and life.
2. **View.** Employees can choose to see information in a chart or table view as appropriate, such as when looking at *My pay* or *My retirement & savings*.
3. **Alerts.** When users need to take action within a section, a bell icon appears in the lower left corner on a red background. Clicking it leads to targeted messaging about what they need to know or do.
4. **Subsections.** If a section has more than one information category, it uses a tabbed design labeled with icons. For instance, the *Health* section is split into flexible spending (a piggy bank), medical (the Rod of Asclepius symbol, commonly used to represent medicine and health care), dental (a tooth and a toothbrush), and vision (an eye and a plus sign). This design lets users dig into the section of interest, without having to leave the page and without cluttering the design with too much information displaying by default. Icons were used because text labels would have stretched the tab design vertically, horizontally, or both. Rollover text identifies the icon tabs to ensure their meanings are clear.
5. **Show values.** To protect each user's privacy, the page loads with values (that is, an individual's details) turned off. The user must flip the toggle to *On* to see personal information. This was done in part to accommodate the subset of employees who work in an open environment or lack a dedicated workstation.
6. **Appreciation points.** The dashboard includes a recognition section, where people can view their appreciation points and other items. Appreciation points are awarded to employees at certain levels who perform above and beyond expectations. Employees can use this area to track their appreciation points, as well as to redeem the points for merchandise or gift cards, available via an online catalog.
7. **Outside information.** Any information that cannot be pulled into the dashboard view is instead offered via a link directly to the appropriate website.

My Pay

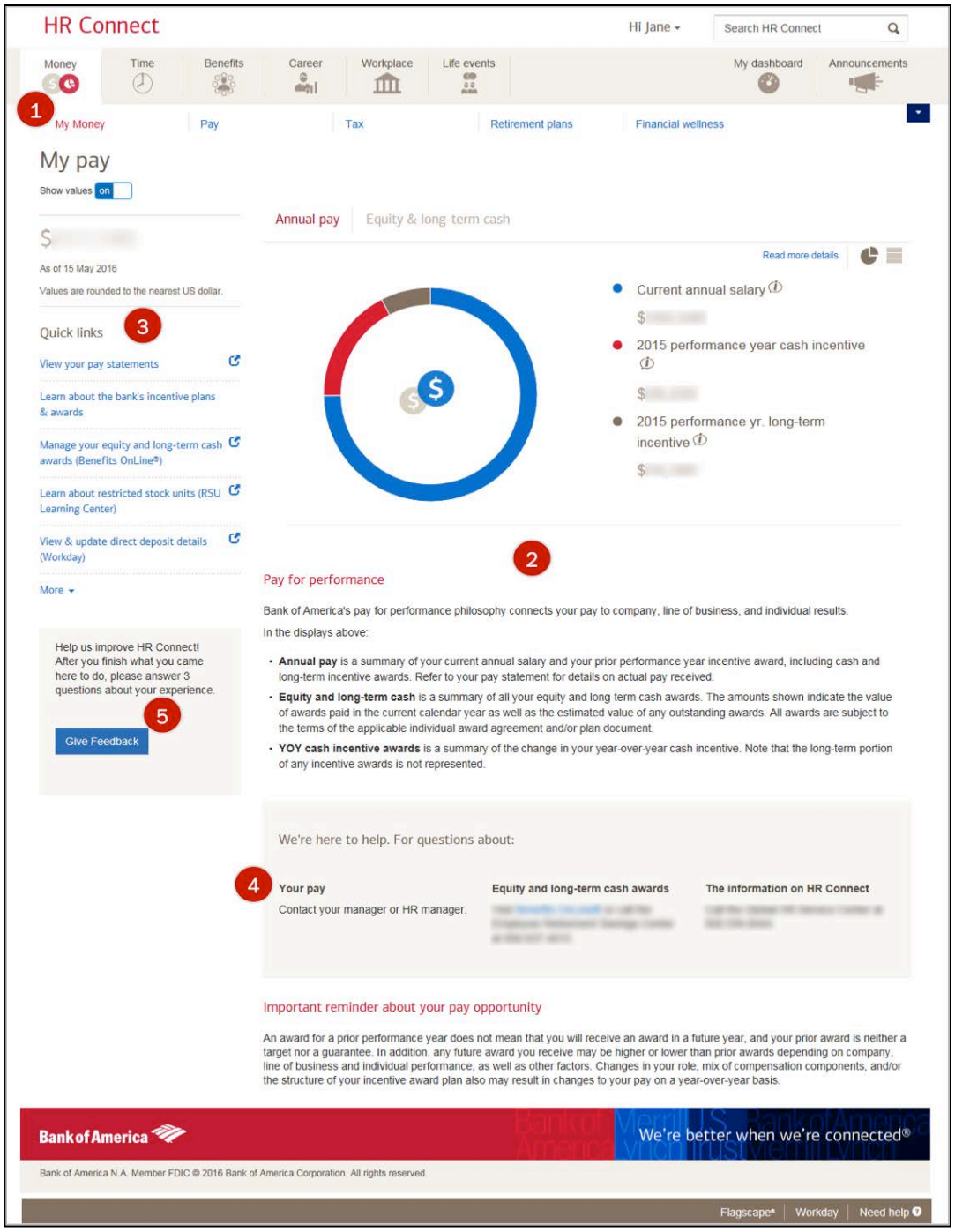


Image 5. Bank of America HR Connect *My Pay*. A detail page of the *My Pay* widget on the HR Connect dashboard.
BankofAmerica_05_MyPay_ValuesOn_live.png

My Pay Highlights

1. **Easy access.** Employees can find information about their pay and benefits by clicking through the dashboard or navigating to the appropriate site section. For instance, pay information is summarized in the dashboard and is also available through the site's *Money* section. Site sections include second-level navigation options that are visible to users. Within *Money*, for example, visitors can navigate to *My Money* (the currently selected section above, highlighted in red), *Pay*, *Tax*, *Retirement plans,* and *Financial wellness*.
2. **Clear summaries.** Pages include clearly summarized information. *Annual pay*, for example, shows the current annual salary, the previous year's performance cash incentive, and the previous year's long-term incentive. Each item is explained briefly in clear text immediately below the graph; thus, rather than wading through wordy documents, users get quick and concise information.
3. **Quick links.** Quick links on the side of the page offer logical next steps in context. For example, links from *Annual pay* lead to *View your pay statements*, *Learn about the bank's incentive plans & awards*, and other related information.
4. **Contact information.** Each page includes contact information for related questions. The *Annual pay* page, for example, includes information about whom to contact in relation to pay, equity, and long-term cash awards, as well as a general contact for information on HR Connect.
5. **Feedback.** The HR Connect team is continually looking for feedback to improve the site. The side of the page includes a link to *Give Feedback* to the HR Connect team. The brief explanatory text nicely highlights that the feedback form has only three questions about the user's site experience.

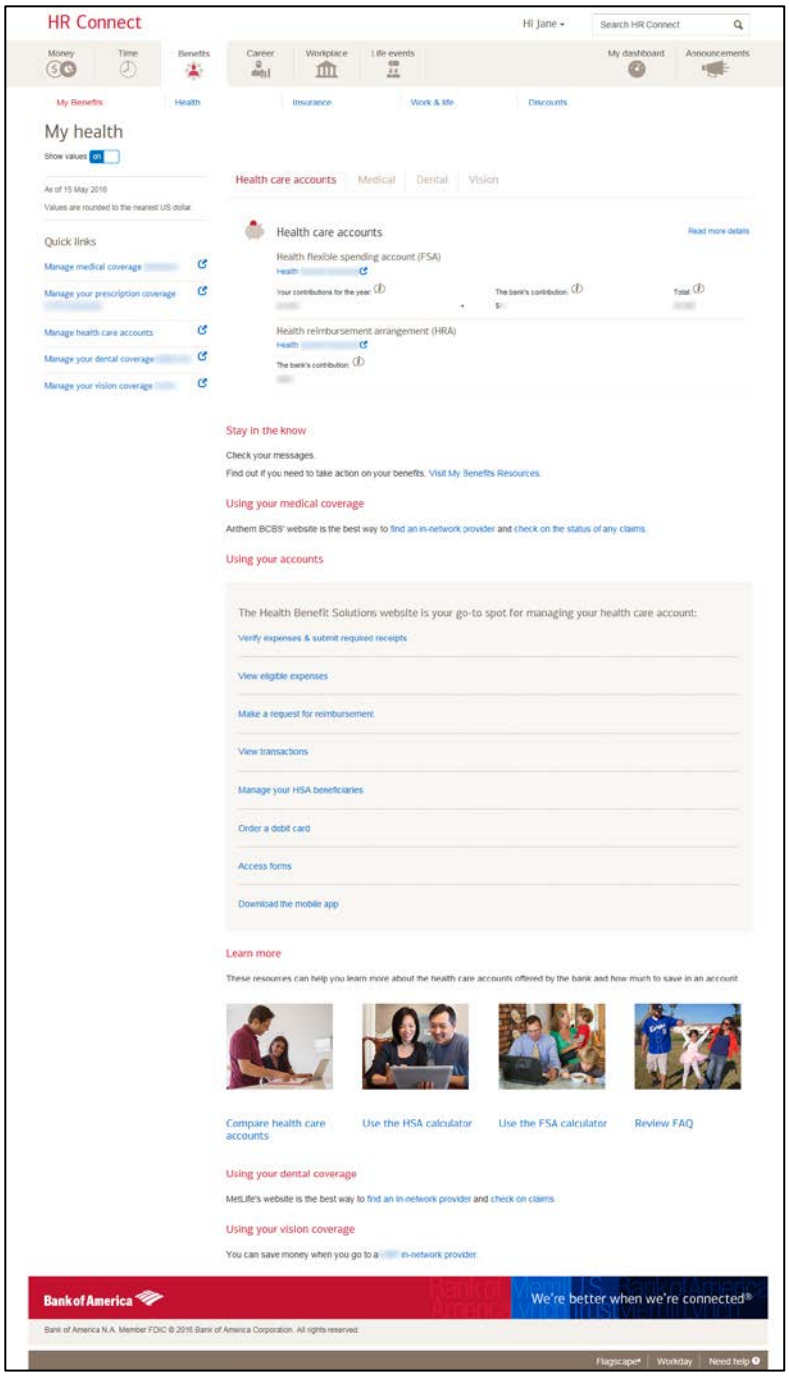


Image 6. Bank of America HR Connect *My Health*. On this *My Health* widget from the HR Connect dashboard, the *Show values* toggle is set to on, showing the personalized summary of the employee's information. *BankofAmerica_06_MyHealth_ValuesOn_live.png*

Search

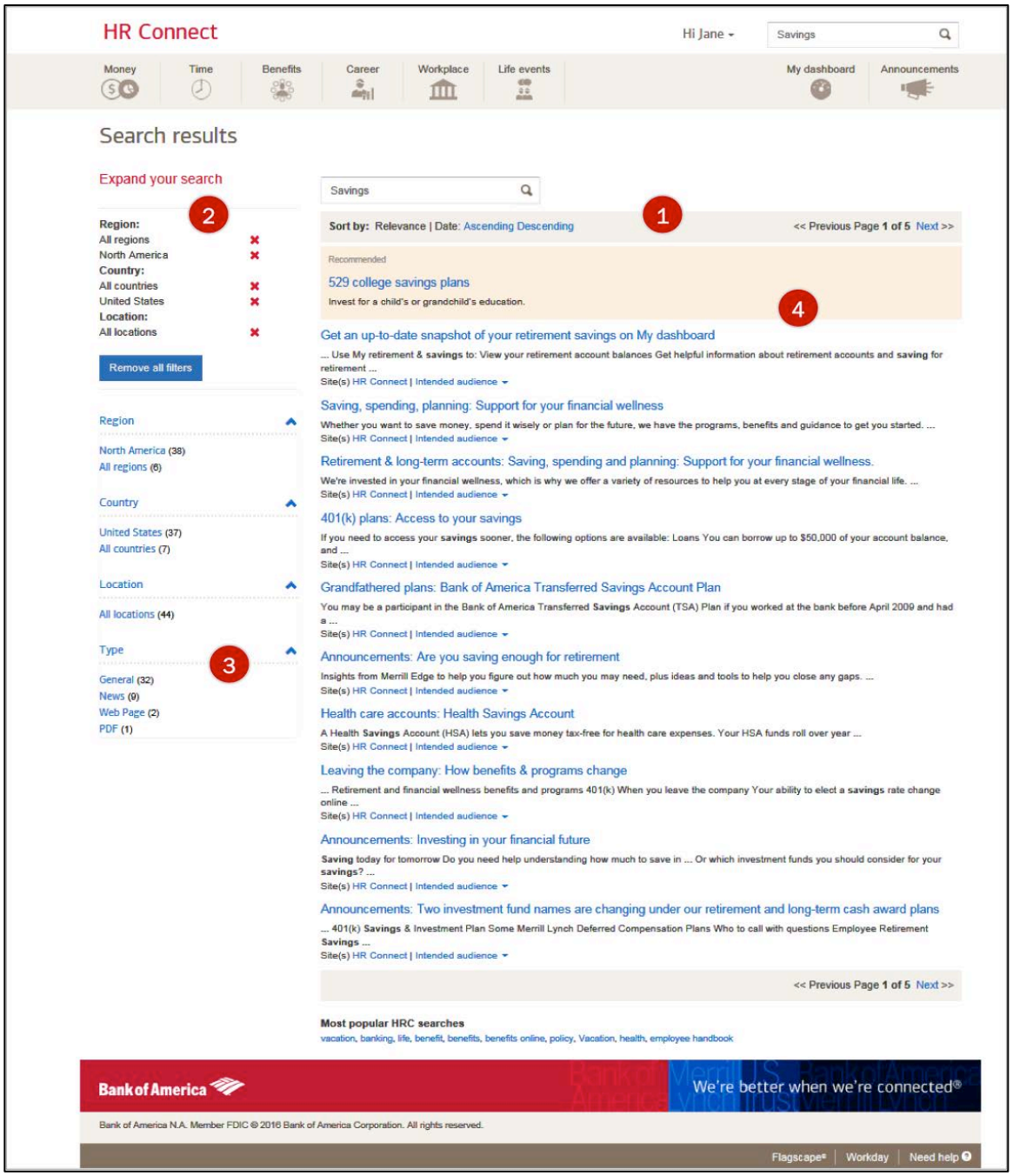


Image 7. Bank of America HR Connect Search Results. This page shows the search results returned when a user searched for the word "savings." *BankofAmerica_07_search_results_live.png*

Search Highlights

1. **Google search.** HR Connect uses Google Search Appliance because the main Flagscape intranet already used it, so the HR content that was moved to HR Connect was already optimized for that search tool.
2. **Automatic filters for personalization.** The side of the page displays selected filters for *Region*, *Country*, and *Location*. These filters are selected and applied to the user's results to deliver the right policy and benefit information to the right users. For instance, a UK user who searches for maternity benefits will see UK-specific benefits information. Users can also remove these filters, such as when an employee who supports colleagues in other countries needs to find information for them. The site offers a simple one-click way to remove all filters, or lets users pick and choose which filters to remove.
3. **Additional filters.** Employees can also further narrow their options by selecting from the list of additional criteria for *Region*, *Country*, *Location*, or *Type* that appears to the left of the results.
4. **Recommended results.** Recommended results are used to help direct users to the best possible result for the query. Each month, the team manually searches the site's 500 most popular queries and reviews the results' value. If the results found are not high quality, the team adds a recommended result and works to improve the general search quality.

Impersonation

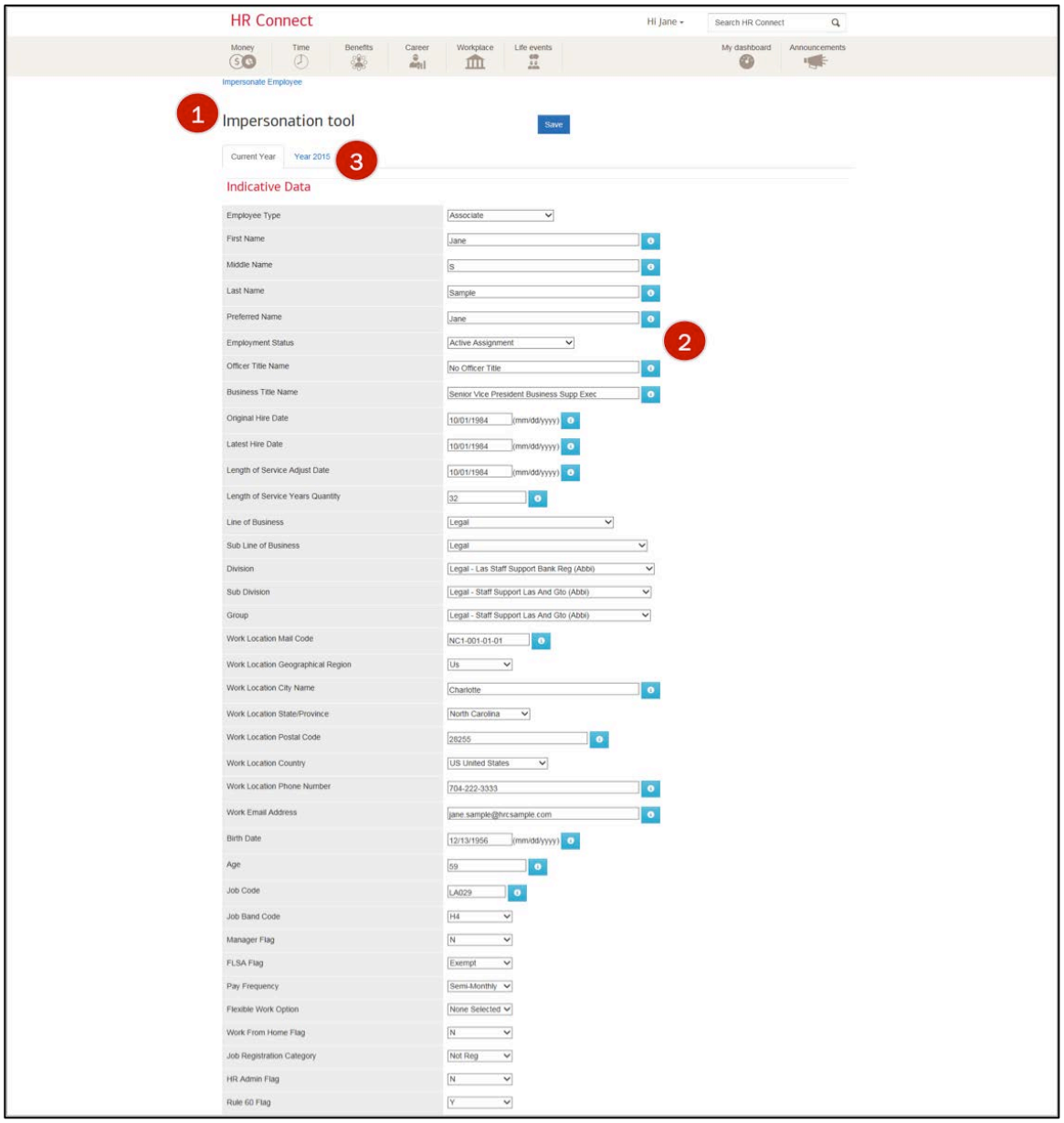


Image 8. Bank of America HR Connect Impersonation Tool.
BankofAmerica_08_Impersonation_Tool_live.png

Impersonation Highlights

1. **Impersonation.** Given the complexity of giving each user an individualized experience on HR Connect, the team needed a way to let support personnel troubleshoot and test different site views. The Impersonation tool allows just that. The impersonation mode — which is accessed via a specific URL, given only to users with permissions — allows testing without having to find a user that meets a particular condition.
2. **Criteria.** The impersonation tool lets support personnel set up any combination of criteria, from employee type to hire date to pay frequency. Additional options (not shown in the screenshot above) include information such as whether the user contributes to a 401(k), works from home, receives childcare reimbursement, or makes commuter benefit contributions.
3. **Years.** Support personnel can make changes for the current year or the previous year, via tabs at the top of the page.

DESIGN PROCESS AND USABILITY WORK

Research

The Employee Experience Research team was involved in all project phases. During the concept phase, it conducted approximately 30 interviews with US and international new hires to understand how HR Connect's personal dashboard concept influenced job desirability. Areas that showed increased job desirability included work/life balance, tuition reimbursement, and mentoring and volunteering. These findings suggested content that should be highlighted.

During the predefine stage, the team developed personas through a series of interviews and used them to help the broader project team understand the end users and their goals. Team members also conducted prototype testing on the HR Connect landing page and dashboard. Card sorts and tree testing helped inform the IA (see below for more information on that process).

One challenge of designing this HR portal was balancing user desires with HR's intent to ensure that required messaging and navigation remain prominent. For example, in early usability testing, users preferred the personalized dashboard as the homepage over a prototype that focused on total rewards positioning. The solution was to redesign the HR Connect homepage to place the dashboard in a prominent location that was easy to access. The total rewards positioning was placed on the dashboard, and the landing page became a place to highlight other valuable content.

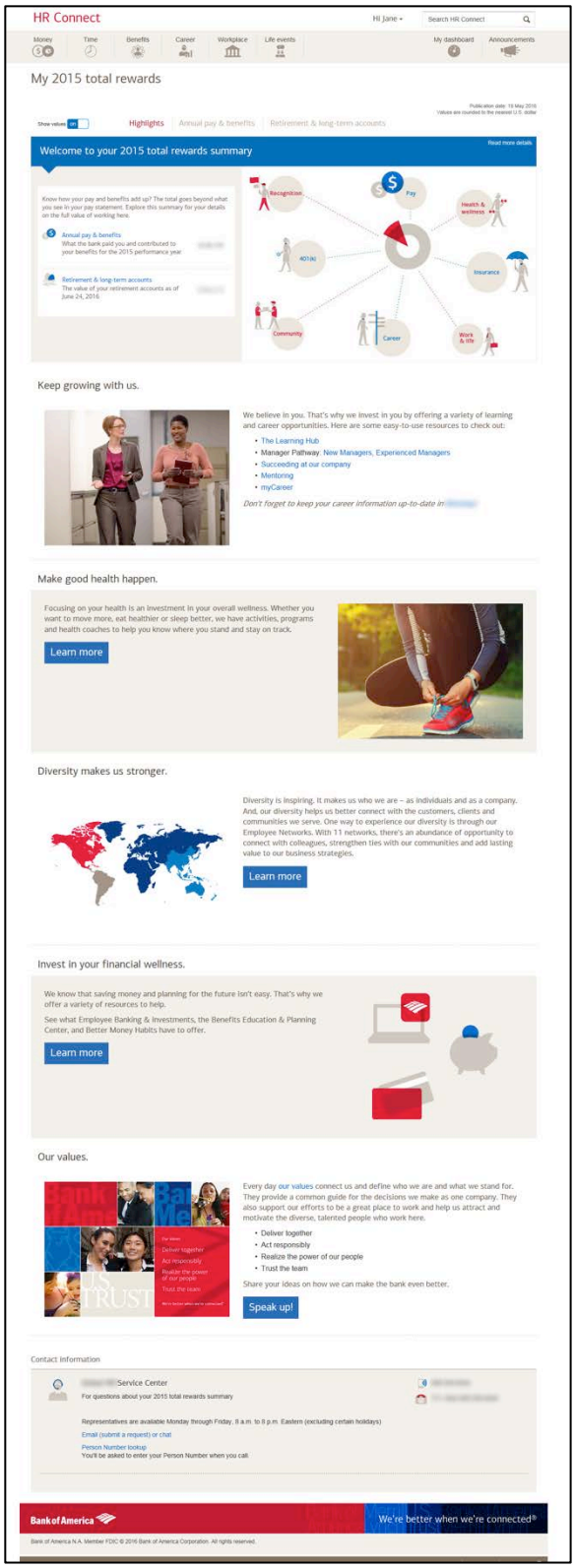


Image 9. Bank of America HR Connect Rewards Summary. The landing page for the total rewards summary, which shows users their total annual pay and benefits and account balances for bank-sponsored retirement accounts. The sections below illustrate what the company calls the benefits "beyond the numbers," which are key benefits and programs that the bank offers employees that are not easily quantified. This page shows five personalized benefits and programs that all users participate in, which is representative of each user's snapshot of benefits and programs. *BankofAmerica_09_TRS_highlights_live.png*

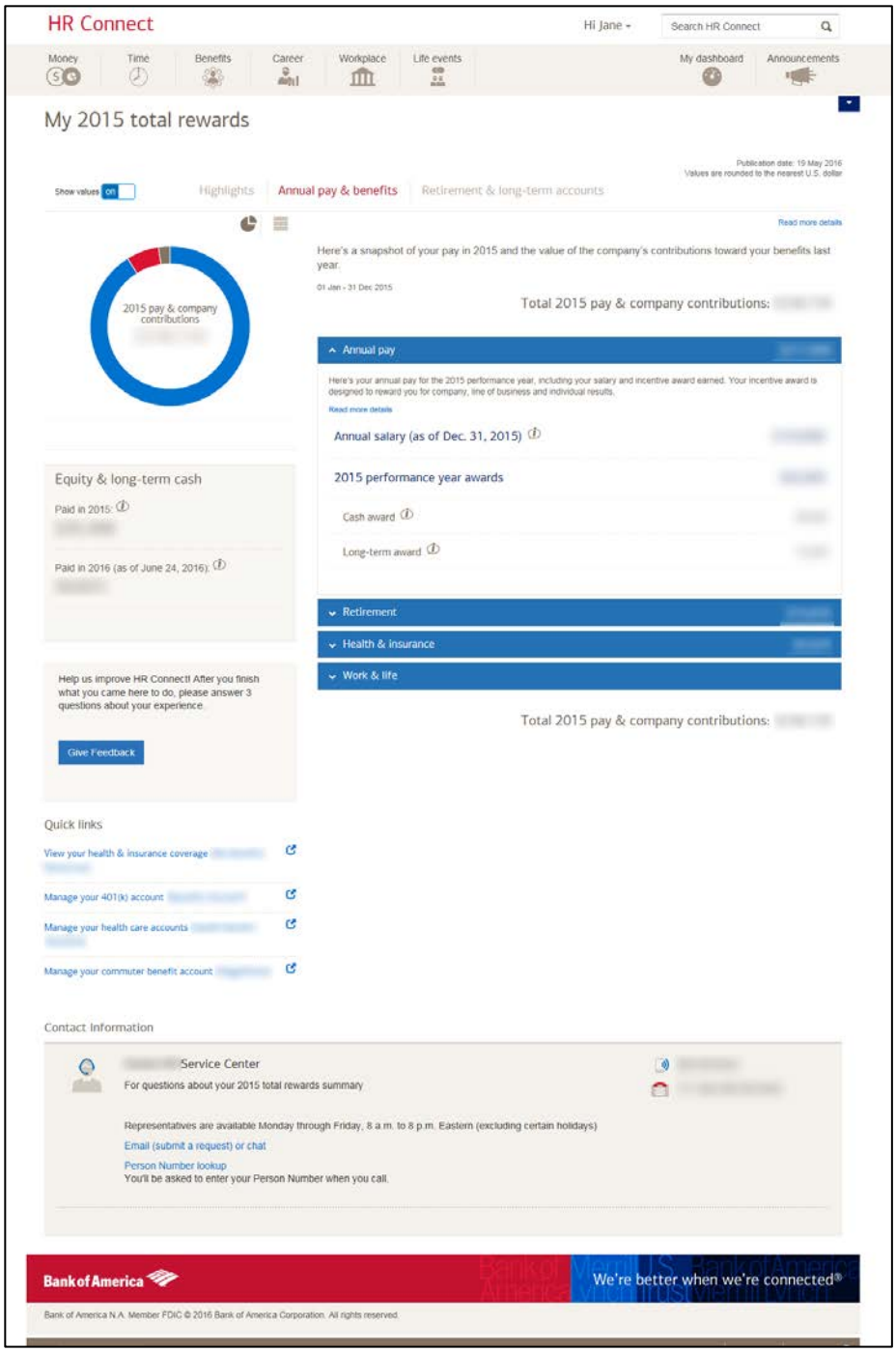


Image 10. Bank of America HR Connect *Annual pay* Tab. This tab shows a detailed breakdown of an employee's total annual pay, retirement, health and insurance, and work and life benefits. The tab includes the company and employee contributions for the prior year. The left rail has an intercept survey that the company uses to gather feedback.
BankofAmerica_10_TRS_annualpay_live.png

Design

The team used the results of the employee experience research as input for the design approach. The design approach also included design critiques with HR SMEs, preview sessions with the core project team, demo days, and working sessions with the company's agency partners.

The design critiques were used to evaluate ideas, identify future directions, and make changes and updates, and were included as part of the requirements sessions with the SMEs. The goal was to finalize the approach in a visual format. After each design critique, the User Experience Design team held preview sessions with the core team to show the progress of visuals. Biweekly demo days with the core team and SMEs were used to show the final refined prototype and gain agreement before starting visual design of the prototype and branded comps. When ready, the branded comps were shown to the SMEs and core team for approval; thereafter, presentation-layer coding began.

After the requirements and early design phases, the team also held iterative work sessions with its agency partners to help integrate all of the various deliverables across work streams for the content build. After these work sessions, the team was able to make key decisions about the IA, navigation, and page templates. These sessions yielded the following goals.

Information Architecture

- Create a site focused on core activities that users perform (that is, a task-based approach) and include
    - Dynamic quick links that link to the next set of user tasks
    - Focus on sample tasks, such as: "I want to (view, learn, understand, change, update) …."
- Support core activities, with links to secondary activities
- Make the site contextually meaningful by integrating content; for example, primary content should focus on core tasks and display meaningful personalized data about the user

Navigation (three-level megamenu)

- Design menus that allow users easy access to the site and
    - Provide consistent navigation that exposes content for quick access
    - Keep parts of the megamenu exposed when users are inside a section
    - Allow for in-page menu access when users are inside a page
- Take advantage of cross-reference and in-page links
- Ensure that top-level navigation contains primary content categories that reflect how users think about taking action

- Use a megamenu to show all of content that can be accessed within a section
- Ensure that subcategories persist within a primary section to help users remember what they can do next

Page Templates

- Create personalized content pages
- Use the dashboard for easily accessible personalized content
- Provide a standard set of content templates for all content views and use them across the site for a seamless feel
- Give the content team maximum flexibility on layout and display
- Keep in mind both ease of use and system maintenance
- Accommodate cross-referenced information
- Standardize the ways in which users will access lower-level content

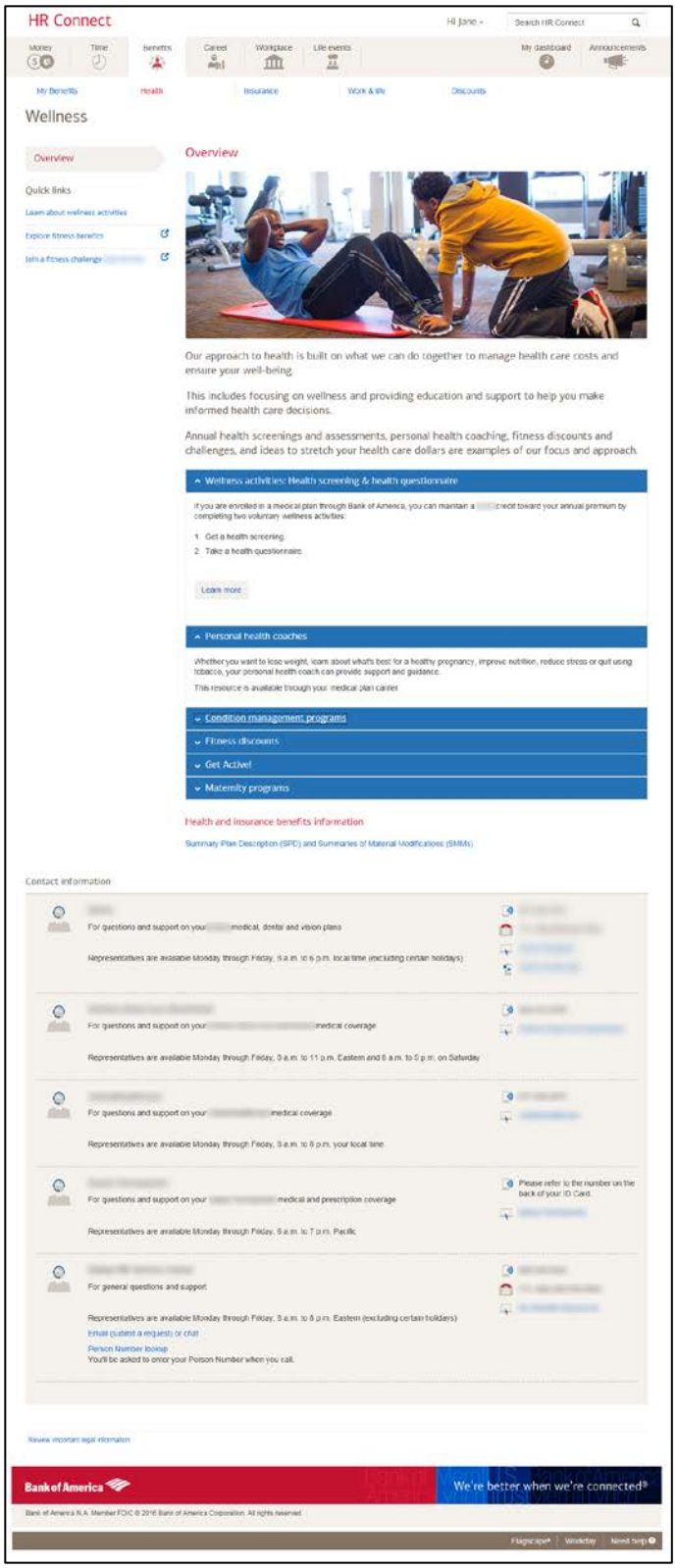


Image 11. Bank of America HR Connect Sample Wellness Content. Sample content page for *Wellness*, which is located in the *Benefits* section under *Health*. Secondary navigation is on the left for most sections; beneath it are *Quick links* that provide at-a-glance access to key websites and resources. *BankofAmerica_11_Wellness_live.png*

Research to Inform the IA

During the predefine phase, the Employee Experience Research team designed and facilitated a content inventory assessment on the current HR intranet. The team suggested ongoing usability research to ensure content effectiveness, making it usable and useful.

Team members also conducted two card sorts with 85 employees and 85 managers. Card sorts were suggested when the core business proposed four navigation labels for the homepage menu. In using card sorts, the team's goal was to understand how employees and managers would organize and label the broad homepage categories. The open card-sort activities proved beneficial, and participants provided useful label suggestions, defining the five categories that influenced the current IA.

Once the card sorts were complete, the team reviewed NN/g's best practices on megamenus and then conducted a series of tree tests on various megamenu iterations to ensure users could find what they need.

The card sorts and tree tests were created using an online remote tool, and users accessed the activity via an email with a link to the studies. The content to be sorted was derived from the top task analysis data, intranet page views, and search terms, as well as from a subset of the content inventory. Surveys and data mining were used to understand and validate the top tasks for employees and managers.

The research team also established usability measurements that it tracked over time. For example, team members created baseline measurements such as time on task (for 50 tasks), tree tests (to measure find ability), and surveys (to measure general satisfaction). They also implemented "true intent surveys" on key pages of the HR portal to understand, in real time, the tasks or goals users were trying to accomplish.

Adoption and Buy-In

One of the biggest challenges of an intranet project is getting buy-in from the organization and enticing people to use the new site. The Bank of America team used a multifaceted approach to ensure an effective rollout and continuing engagement.

The organization has a well-defined governance structure that regularly updates HR leadership. HR designees representing each line of business review upcoming changes, obtain input on the best way to communicate to the lines of business and unique employee populations, and share information with line-of-business leaders. "We use a variety of methods when communicating information about our HR portal," says Kristin Schultz, User Researcher Specialist, "including news articles, demonstration sessions and replays, manager and employee emails, quick reference guides, brief videos, and resources for managers to use in team meetings and huddles.

"For HR Connect go live, we also had a communication sustainment plan to reinforce the use of the content, dashboard, and other features," she says. "Even with all of these methods, we always have to balance the amount of change impacting our employees."

Working with Outside Agencies

The internal team worked with two outside agencies to understand best practices for the site map and IA, UX design, style guidelines, and the naming analysis and linguistic review, as well as for developing generic and variable content.

GOVERNANCE

The Bank of America intranet team is comprised of three key groups from across the organization: Enterprise Communications, Global HR, and Global Technology & Operations. Enterprise Communications owns the enterprise intranet Flagscape. Global HR provides subject matter expertise and strategic direction, specifically to HR Connect, which is a part of Flagscape. The Global Technology & Operations team is responsible for site design, development, maintenance, operational infrastructure, and technology enhancements for both Flagscape and HR Connect. These groups have a strong partnership aimed at designing, developing, implementing, and maintaining HR Connect in way that ensures an optimal employee experience.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
HR Connect Business Team	• Provides strategic vision for future enhancements and key priorities • Ensures integration with core HR functions and service providers • Defines business requirements, provides input to design staff, conducts user acceptance testing, and validates content and data • Coordinates content and link updates with Communications and Channels departments and performs content validation • Researches production issues and answers employee questions as needed • Monitors production support incidents and file loads • Performs data analysis as required to support business requirements • Compiles monthly usage metrics and analyzes user behavior
Employee Experience Research Team	• Gathers employee feedback through various methods (tree tests, card sorts, surveys, interviews, focus groups), compiles results, and recommends opportunities for improvement • Provides guidance to integrated team on employee experience considerations
Design (UX) Team	• Maintains end-to-end UX, design, and branding for the platform
Development Team	• Oversees content input and management within the CMS • Ensures search engine optimization for site content
Project Management Team	• Manages end-to-end project deliverables, milestones, budget, risks, and issues during the project
Global HR Communications Team	• Develops overall content for web pages, personalized data displays, news articles, announcements, and notifications as part of

	ongoing editorial management process • Maintains a schedule of news articles, announcements, and articles for site-related content • Proofreads content additions and changes • Ensures consistency of tone and voice in content
Technology/Production Support Team	• Develops, tests, and deploys system changes • Manages incidents and resolves as needed • Monitors system stability • Ensures integration with various data sources to provide accurate personalized information for the dashboard and summary • Designs and develops portal platform administration screens, site structure, and backend systems as needed

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://hrconnect.bankofamerica.com/portal/site/hrc15010092/
Default Status	Flagscape, the enterprise intranet, is the main homepage for all Bank of America employees. Employees can access HR Connect from the global navigation on Flagscape via the HR Connect tab or through the toolbar link at the bottom of the browser window under *Essential links*.
Remote Access	Employees can access HR Connect from home, including with mobile devices, through VPN. Access from home, separate from VPN, is scheduled to be available in the near future.
Shared Workstations or Kiosks	In the company's financial centers, employees can access HR Connect from shared workstations, which require them to log in using their personal credentials.

TIMELINE

PROJECT MILESTONES	
Item	**Status**
August 2014–February 2015	• **Employee experience research:** personas, content audit, card sorts, tree tests
August 2014–February 2015	• Business requirements
October 2014–April 2015	• **UX design:** wireframes, branded mock-ups, system design
April–August 2015	• Content development, review, approval
March–September 2015	• System development
September–November 2015	• System integration, user acceptance testing
September–December 2015	• Online content validation and proofing
January 2016	• Launched HR Connect (version 1)
June 2016	• Added total rewards feature for US employees (version 2)
Overall redesign timeframe: One year and 10 months	

CONTENT AND CONTENT CONTRIBUTORS

Content Management Process

Business owners and their corporate communications partners identify content changes; the communications partners then develop the new or changed content and submit it to the HR Connect team, which reviews it for consistency and tone. Once approved, the change is staged in a preproduction environment where it awaits final approval by the communications partners and business owners.

HR Connect is employee-focused and content is written in a conversational style and tone. The site is easy to understand, and it makes resources and contact information readily available. If managers need specific content to support their employees, the team will write it, targeting it as needed.

Culling Content

Team members culled, organized, and moved content from the company's former HR pages on Flagscape to HR Connect. In the process, they thoroughly inventoried all Flagscape content, analyzing the information and determining the purpose of every page. They then identified the best way to consolidate or repurpose content and remedy any gaps. This process led the team to create and map the IA.

Once the IA was in place, team members created a template for the content copy decks to ensure everything was in a standard format. Communications created a first draft in the template, which was shared with the line-of-business Communications manager. From there, it was shared with business SMEs. Once all feedback had been consolidated, the copy deck moved back to the Communications team for additional clean up and consistency checks. Prior to launch, the HR Connect business team held demonstrations with the business executives, so they could see their content in a test environment online.

Content Inventory: A Critical Step

As part of the initial content migration from the company's Flagscape HR pages to HR Connect, team members endeavored to take detailed process information (how-to content) and make it available at the transaction point (such as in Workday) rather than on HR Connect. If that was not possible, they placed process content in standalone discovery documents that could be linked to from HR Connect. These documents can be updated easily as processes change, without disrupting intranet page content. It also keeps the site's pages visually cleaner and easier to read.

The team's thorough content inventory was critical to determining where the cross-reference points needed to be. Another key factor was developing the IA strategy before writing content. This helped ensure consistency of direction and employee experience, as well as easy-to-understand section labels; it also enabled content development to drive the supporting subsections as needed.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Oracle 11g • Solaris • Apache 2.2.31 — 64 Bit
Bug Tracking/ Quality Assurance	• Quality Center
Design Tools	• Axure RP PRO • Adobe Creative Suite
Site Building Tools	• Java, JavaScript, Bootstrap, High Charts, Open Text APIs, jQuery • Open Text Portal, Open Text Dynamic Portlet Module • Maven for build • Subversion for source control
Content Management Tools	• Open Text Web Experience Management • ePhox Web Editor
Search	• Google Search Appliance

Technology Evaluation

Deciding which platform to use on the backend required some winnowing based on constraints, followed by a comparison of the technology and capabilities of OpenText Portal vs. Oracle WebCenter Portal. Due to the existing application RFP process, application proof of concepts and existing technologies, all other portal technologies were out of scope. The assessment approach was used to analyze the tools' various technical components and functional feature executions. The team used several approaches for gathering information in this assessment, including

- A technical questionnaire
- Proof of concept comparison
- Technical components comparison
- Functional execution comparison
- Third-party technology documentation

ROI

The company's objective with HR Connect was to deliver an integrated HR portal that would give employees quick access to information and content, along with a pathway

to all their needed HR tools and transactions. Since implementing HR Connect, the team has collected employee feedback through online surveys and interviews. The majority of employee feedback regarding the site's look and feel has been positive. Employees say the online HR experience has made huge strides forward and the new gateway to HR tools and applications is comprehensive, yet easy to navigate and use.

"We have been delighted with the employee response," says Schultz. "It is increasing employee satisfaction and engagement, and creating a greater return on investment in employees for the organization at large."

The following employee comments have been received through online surveys:

> "Awesome layout. Very pleased with the new site and ease of use."
>
> "I love it! The new site is awesome. Definitely an improved experience. It is nice to have everything centrally located. Great work. Thank you!"
>
> "Very user friendly & intuitive. Love it."
>
> "I really like the new site, especially the dashboard. Great improvement. Thank you."
>
> "Nice, new, and easy to navigate layout... all in one place!"

The team collects usage metrics on a monthly and quarterly basis, including visitor metrics, top page visits, and top searches. Following is a summary of second quarter 2016 visitor metrics regarding usage.

Visitor Metrics	Q2 2016 Total
Unique visitors	~200k
Employees who visited once	~35k
Employees who visited more than once	~165k
Average number of visits per day on weekdays	~30k

LESSONS LEARNED

LESSONS LEARNED		
Process Area	**Challenge**	**Solution**
Documentation	The Development team had an excessive number of documents to refer to during the design/development stage, including business requirements, use cases, wireframes, data elements, HTML/CSS, branded comps, and a traceability matrix.	Minimize the number of links in business requirements and aim to create a single document when documenting requirements; in this case, the Bank of America team eventually placed a panel on every page of the Axure prototype, with links to all the documents needed to design/code that particular page
Documentation	With so much variable and customized content, better-defined use cases were needed for every flavor of web page and messaging to accommodate multiple roles and views within the site.	Include more time and resources during requirements gathering to document use cases prior to business requirements sign-off and handoff to technology team
Process	The team needed a two-week code lockdown between user acceptance testing (UAT) and deployment, meaning that no changes should occur in the UAT environment during that time.	Account for the two weeks of code freeze between UAT sign-off and deployment day in the timeline
Process	Activities dependent on each other should not be performed in parallel. For example, the design processes for the Data and Development teams should not be concurrent.	Minimize overlap of activities while developing the project timeline and ensure that risks are called out if overlap is required
Content Validation	Too much time was spent validating links across multiple environments during testing.	Rather than spend time pointing links to development (DEV) and system integration test (SIT) environments, point them only to production and testing at the right time
User and Employee	Timeline and key activities	Have more UX sessions as part

Experience Research	must be purposefully planned to allow time for UX activities.	of future HR Connect releases to gather feedback and address issues prior to development
Information Architecture	The IA strategy must be developed prior to writing content.	To help ensure consistency of direction and employee experience, create easy-to-understand section labels and finalize IA prior to writing content

BEST PRACTICES

- **Deliverables.** The Data team created a dashboard view to help make design and development clearer and more efficient.
- **Testing activities.** During testing, SME testers were brought in for a three-day in-person testing cycle. It was a key part of the testing success. The take-away from this success is that teams should clearly define the scope and goals of on-site testing; confirm system access for each tester prior to arriving on-site.
- **Design meeting.** A weekly meeting was dedicated to working through design questions, as well as to engaging the entire team to increase awareness and encourage input. This approach was so helpful the team continued using a weekly design meeting for future releases and also for business-as-usual changes.

Encana Corporation

OVERVIEW

COMPANY

Encana is a leading North American energy producer focused on growing its strong portfolio of diverse resource plays producing natural gas, oil, and natural gas liquids. By partnering with employees, community organizations, and other businesses, Encana contributes to the strength and sustainability of the communities where it operates. Encana's vision is to consistently deliver strong operational and financial results by finding and developing high-quality resource plays in North America and operating in those plays more efficiently than its competitors.

Headquarters: Calgary, Alberta, Canada

Company locations: Encana has offices across North America, with Canada operations headquartered in Calgary, Alberta, and US operations headquartered in Denver, Colorado.

Locations where people use the intranet: Employees and contractors at all company locations have access to and use the intranet.

Annual sales: N/A

THE INTRANET

Users: 5,000 users at the beginning of the project; 2,600 after downsizing

Mobile approach: Because of budget and technology restrictions, developing a responsive design solution was not part of the scope for the initial rollout phases of the new portal. The company is currently working on a full strategy and roadmap for developing a more robust mobile experience.

Technology platform: SharePoint 2013

TEAM

Project Sponsors: Ryder McRitchie and Josh Pinkert

Design & Leadership: George Loos

In-house Project Team: Debbie Bender, Judy Fisher, Heide Ghelfi Calderon, Ryan Kazmerik, George Loos, Tim Maxwell, Heather Murray, Ben Nwachukwu, Andrea Romain, Monica Seymour, Omar Sultan, Marcelo Zaquia

IA Design & Technical Development: Habanero Consulting

Stakeholder Interviews & Conceptual Site Maps: UX Guys

ECN Operations Team/Ecomms Analyst (OT): George Loos, Debbie Bender, Omar Sultan, Jana Keirstead

ECN Technical Support Team (TST): Ryan Kazmerik, Ben Nwachukwu, Stephanie Reid

INTRANET TEAM



Team members shown here (top row, left to right): Debbie Bender, Omar Sultan, Monica Seymour, and George Loos; (second row, left to right): Heather Murray, Andrea Romain, Ryan Kazmerik, and Ben Nwachukwu; (third row, left to right): Rick Rosario, Tim Maxwell, Heide Calderon Ghelfi, and Marcelo Zaquia; (fourth row): Judy Fisher.

HIGHLIGHTS ABOUT THIS WINNER

Consolidated is the best word to describe ECN, Encana's intranet. With a litany of challenges to overcome, team members focused on short-term goals, and then reminded each other of achievements and wins to stay motivated. Summarizing goals for the projects and for particular design sections, such as sites, helped focus team members, who were not always full-time on the intranet.

The outstanding design includes interesting news from across the company, tools that help employees do their work, and engaging features to entice all employees to read and participate. But the team's efforts in inventorying, auditing, and consolidating elements — from the IA to policies — make this design slick and innovative.

- ***Top Tools*.** This menu provides a clever way to consolidate the many favorites lists that teams so often create; it serves key tools to users in a more systematic way.
- **Footer.** A footer helps users because it appears on all pages, so they get used to having it. It's often the person's "last try" before calling support for help. Here, the pages house a large footer with social links, a Twitter feed, the three most *Recent ECN Headlines* (dynamically pulled from the news archive), and current external *News Releases* or press releases about Encana that also appear on the public-facing site. The footer also includes *Quick Links* that lead to useful pages (the same links are also in the megamenu); *Popular Search Terms* (based on web metrics); a stock ticker that is dynamically fed and updated, and links to social networks.
- **Social.** The footer's social network icons link to Encana's pages on those networks. The top of the footer displays the most recent tweet from the Encana Twitter feed and is dynamically updated. With all of this at their fingertips, users quickly get a taste of what people are saying by simply scrolling to the bottom of any intranet page, rather than having to seek out those social channels on their own.
- **Tone of voice.** The writing on ECN is targeted based on the type of content and the intended audience. Fun sections sound fun, and business-like sections sound business-like.
- **Bulletins.** Bulletins teach and encourage people to engage. Topics cover anything under the sun — from photos showing Super Bowl team support to an audio interview and infographic about hedging.
- **Megamenus.** Whenever possible, all commands are shown; to declutter, however, menus with many links use collapsed sections. The *How do I…* section, which appears on the right side of all megamenus, is a creative, helpful way to answer common questions about the menu and its links.
- **Consolidation.** The team took many disparate systems, along with information peppered throughout the organization, and consolidated it all in a single, logically organized location.

- **Improved access and findability.** Tools, eLearning, policies, team spaces, and much more are now easier to find through the new menus and search function than they were on the old intranet. A revamped IA and a shared vocabulary are only some of the reasons for this improvement.
- **Help.** Help comes in various forms, from in-the-moment layers on pages to menu FAQs to a bona fide user manual. Whatever the medium, the help is there to help.

BACKGROUND

Encana's intranet, ECN, lets all staff members enrich themselves with relevant, useful, and interesting information; showcases and celebrates key achievements throughout the company; and elevates business knowledge. Encana's previous intranet relied on an older backend portal technology platform that was difficult and costly to support. The aging platform presented a critical risk for the organization; it could crash at any time, making the data recoverable only through significant effort. This reality was a driving force behind the company's decision to update the aging intranet and the technology that supported it.

The team defined three guiding principles for the intranet project, as well as the goals it hoped to achieve, both for the organization and its employees.

Guiding Principles

- Establish ECN as the single point-of-access for trusted, useful communications, business content, and enterprise applications, and as the gateway for staff connections and collaborations within Encana.
- Build a scalable and flexible content structure and improved IA. Provide direct access to the relevant information staff members need to stay informed, do their job, and perform their assigned responsibilities.
- Introduce a new framework that will enable collaboration through team, project, and community sites that will empower staff, groups, and project teams to share documents, information, and ideas safely and quickly.

Redesign Goals: The Organization

- Migrate ECN to a stable, supported, and compatible technical environment (SharePoint)
- Leverage out-of-the-box SharePoint functionality
- Migrate all enterprise content to the new ECN SharePoint environment
- Develop a web content management strategy that addresses
    - Site authoring
    - Governance

    - Collaboration
    - Administrative tools
- Refresh the ECN experience to include
    - Improved end-user experience
    - Improved web authoring and editing (with a simplified publishing processes and training)
    - Increased accessibility to relevant, well-organized information
- Use education to facilitate the new intranet's introduction as a platform for collaboration and to facilitate a change management process
- Normalize ECN content (sites, documents, and so on) to give employees greater access to content and more accurate content search
- Position Encana's intranet technology and architecture to accommodate future growth opportunities for mobility solutions
- Position Encana's intranet technology and architecture to accommodate future third-party collaborations
- Articulate the project strategy and regularly update progress
- Raise staff members' business literacy and empower them to act as advocates
- Provide accurate and trusted information about industry issues and key operational processes
- Support client-driven communication goals and programs
- Introduce a platform that lets employees connect, collaborate, and share knowledge

Redesign Goals: Employees

- Celebrate staff members and build their excitement about the company
- Provide quick and easy access to the tools and resources people need to effectively do their jobs
- Provide quick and easy access to learning and development opportunities
- Improve access and findability of self-service tools

Challenges

The Encana team suffered through a set of project challenges that would humble most teams. This project spanned two CEOs, a round of lay-offs that decimated the project team, a Communications team restructuring, an overall company restructuring, the release of a new corporate focus and business strategy, four different project sponsors, and three different project managers. And yet through it

all, team members found ways to regroup, creatively manage changing resources and project tasks, and lean on smaller project teams and champions to keep the project on track. The new intranet was launched on time and under budget, with strong leadership endorsement.

George Loos, Manager of ECommunications, explains some of the high-level challenges and lessons the team learned while navigating an ever-changing environment:

- **Champions were pivotal.** "We were forced to repeat many of our efforts to reach out to the business when some of our subject matter experts left the company suddenly due to downsizing. To help mitigate, we started to identify champions in the business who could be a single point of contact and help triage when staff structure changes impacted the project. Finding key champions and strategic partners was critical to our success. Engaging with staff and early adopters regularly helped us get valuable and immediate feedback to help create a positive user experience."
- **Governance provided a strong foundation.** "We invested a considerable effort to develop a governance framework that would help us manage and maintain ECN once our intranet launched, but we could have also used a project governance structure to help clarify who signed-off of which decisions and how we as a project team could reach consensus quicker."
- **Documentation is critical.** "We spent time and effort second-guessing and revisiting decisions that could have been avoided if we had captured decision records better."



Image 12. Encana Intranet Old Homepage. The homepage prior to the redesign. *encana_01_home_legacy.png*

DESIGN REVIEW

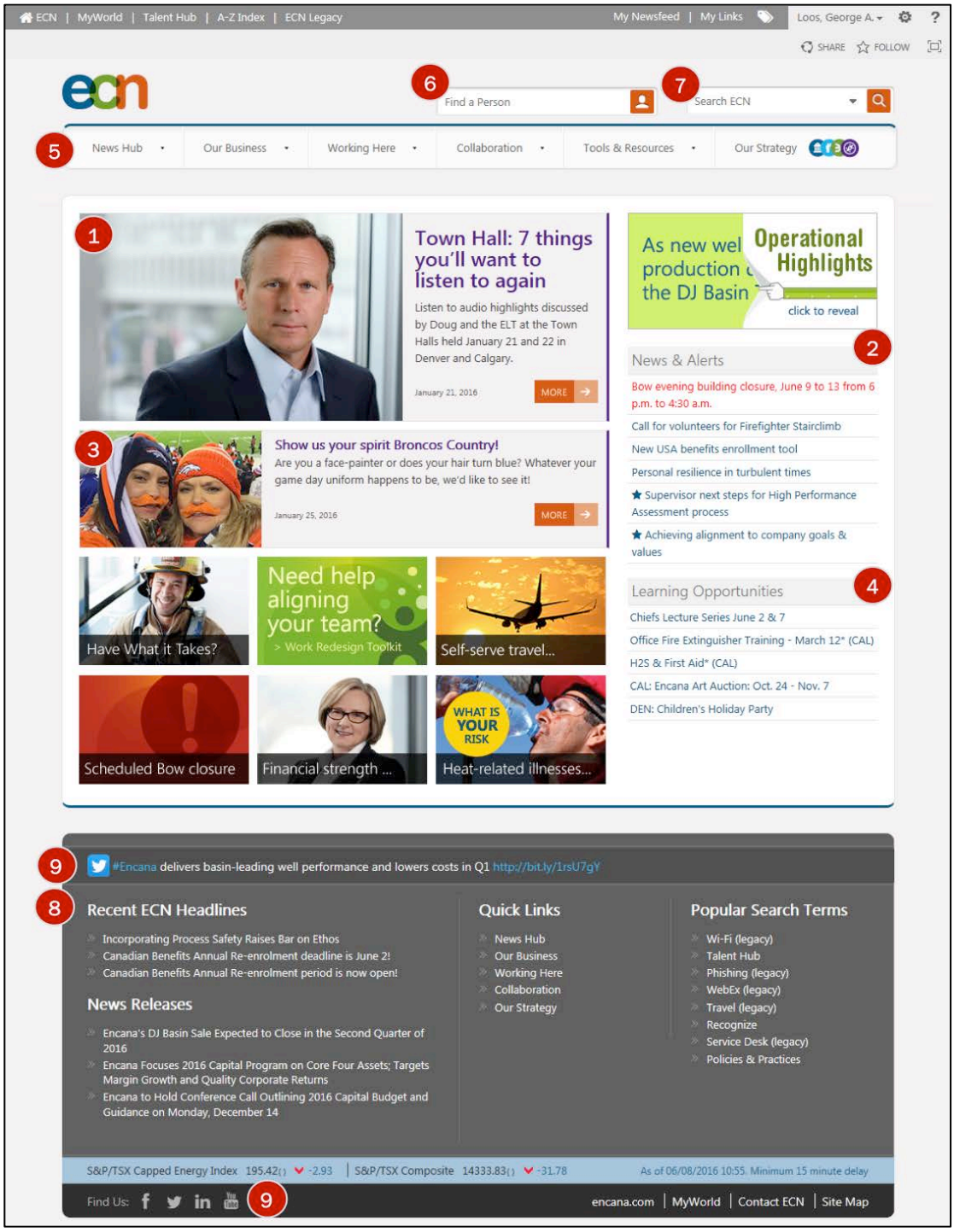


Image 13. Encana Intranet New Homepage. The homepage houses various types of news and alerts, and a helpful fat footer. *encana_02_home_live.png*

Homepage Highlights

A quick scan of the homepage shows news and alerts, site search and people search, and a clear menu.

1. **Corporate news.** The homepage's main (left) section includes corporate news. Each item has a clear headline and short description, and usually a related image. These traits help entice employees to read the corporate news and stay abreast of what's happening at Encana. Topics in this section are usually focused on company strategy; announcements by senior leaders; celebrations of staff, operations, or business; and company values. The section also includes information to help raise employees' business literacy. With more knowledge and higher confidence, employees are empowered to act as Encana advocates. The content changes daily, but larger feature stories often stay on the homepage for approximately 10 business days. Depending on other news, those features sometimes move to a less-visible homepage section. The goal is to post three new stories or bulletins each week. An editorial board brainstorms new ideas and how to focus on them for the weeks following.
2. ***News & Alerts*.** News from around the company appears in the right rail. Here, teams learn about company projects that are important or interesting, but might not impact a large number of staff members. Most of the news featured here is the same for all employees, but some news is targeted to the employee's role and is indicated by a star icon to the left of the news item. Alerts appear in red text above this section's news.
3. **Photos.** Photos for news articles come from news writers, members of the operational team for field-related photos, and (rarely) drone photographers. In a pinch, the team uses stock art photos.
4. ***Learning Opportunities*.** The right rail also offers a list of links to lectures and other events. Any team hosting a learning session to benefit staff and support its own work can post it here. Encana also has a corporate learning website, and some teams have their own learning offerings. The *Learning Opportunities* sections are more active fall through spring (September–May); summer months tend to be less busy due to vacations.
5. **Menu.** The top, horizontal menu makes it easy for employees to scan ECN's offerings. The menu appears in an expected position, and stands out due to the white text against the gray page background.
6. **People search.** Employee search, the most important feature on most intranets, is visible at the top of all pages, with a white field and gray banner background behind it enhancing its visibility. The words *Find a Person* distinguish it from the site search, as does the orange button with the person icon on it. Typing three letters in the field opens a drop-down list of employees who best match the query. Basic contact information also appears, making it easy to find and quickly get in touch with colleagues.
7. **Search.** Employees who know the terms they are looking for can easily locate the site search field, which is on all pages and located to the right of the employee search field. The words *Search ECN* and the orange magnifying

glass button are used to invoke the search and help differentiate site search from its close-by cousin, people search. Having a separate search field for employees and the site makes it easier to find colleagues, and ECN got both searches just right: placing the two fields in close proximity makes it much easier for users to distinguish between them. A *Did you mean…* feature helps with spelling errors.

8. **Footer.** The footer is sometimes a throwaway section, but Encana's footer is highly valuable. The large footer on the bottom section of each page includes social links, a Twitter feed, and the three most *Recent ECN Headlines* (dynamically pulled from the news archive), along with current external *News Releases* and press releases about Encana, which also appear on the public-facing site. The footer's *Quick Links*, which also appear in the megamenu, lead to useful pages. In addition, the footer includes popular search terms (based on web metrics) and a dynamically fed and updated stock ticker. Footers are helpful because they appear on every page and people get used to seeing them; a footer is often a person's last resort before calling support for help.
9. **Social.** In the footer, social network icons lead to Encana's pages on those networks. The most recent tweet to the Encana Twitter feed displays at the top of the footer and is dynamically updated. These tweets give users a quick taste of what people are saying simply by scrolling to the bottom of any intranet page, saving them a trip out to social channels.

Megamenus

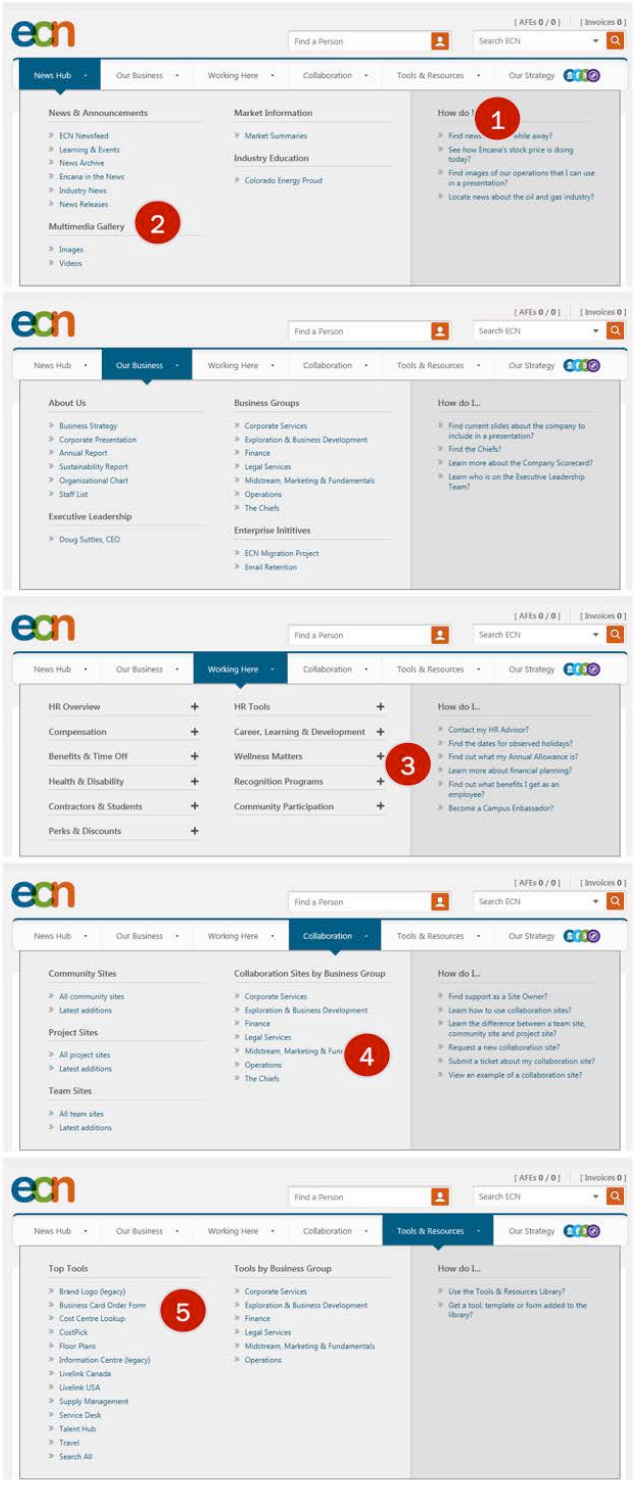


Image 14. Encana Intranet Megamenus. Much research went into determining the Encana intranet's IA and menu structure. Megamenus have clear commands and even contain help in the *How do I…* section. *encana_03_menu_navigation.png*

Megamenus Highlights

Encana intranet team members put an extraordinary amount of work into building an IA that would be flexible enough to withstand the changes they predicted would be coming to their industry and their company. Once created, the team poured the global navigation commands into a megamenu design that is both useful and scalable.

1. ***How do I….*** This very special, uncommon feature makes great use of the megamenu UI. The team considers the most common questions and content queries that employees submit, and creates the questions and answers for this section of the menu. The questions are contextual and targeted toward the currently selected, top-level navigation command, so different pertinent questions appear in each menu.
2. **Identifiable headings.** Within the megamenus, section headings are easy to find: they are in bold, gray text that is larger than the link text.
3. **Expand.** Menus that have many commands are not flat — that is, they do not show all links by default; instead, links are collapsed under the topic heading, with a plus sign indicating that the section is expandable. The team chose a standard way to expand and collapse the menus: clicking the plus sign or the heading expands that section to expose the links. The plus icon then turns into a minus icon, which can be clicked to collapse the section. Collapsing some menus by default was a smart design tradeoff, given the team's clear goal to limit the number of top-level commands.
4. **Link text.** Links are indicated with the strong signifier — blue text — which serendipitously matches the ECN color scheme.
5. ***Top Tools*.** This menu is a clever way to consolidate the many favorites lists that teams so often create. It also delivers the most important tools to users in a systematic way. In the previous intranet, people in various business segments created their own lists, favorites forms, templates, and so on. The *Top Tools* page was created to replace all these pages and link lists with a single source of truth that would be managed with clever metadata strategies and search filters. The team collected and sorted all the links, categorized them into tools, forms, or templates, and determined how they should be tagged based on their functional group and their region.

Invoice Alert

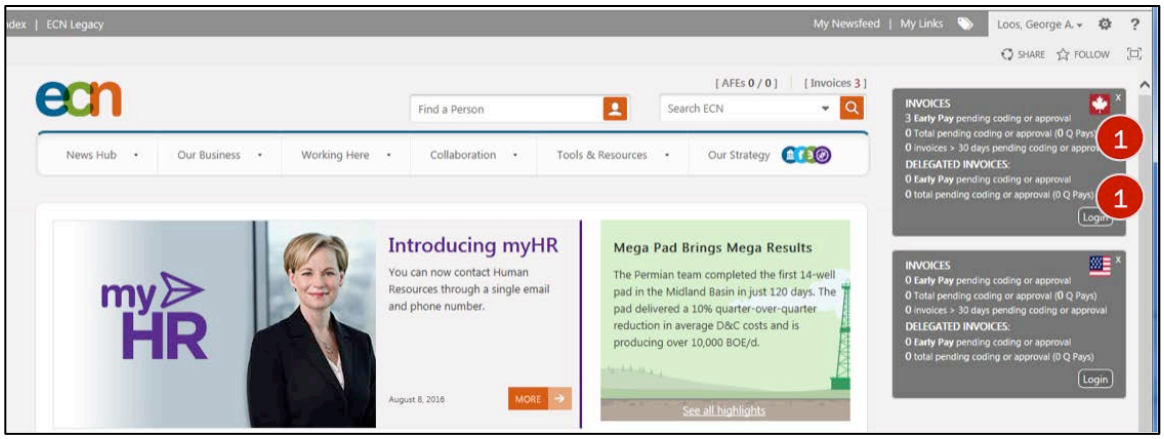


Image 15. Encana Intranet Invoice Alerts. Invoice alerts appear on the homepage to remind people to pay them. *encana_04_invoice_alert.png*

Invoice Alert Highlights

1. **Alert box.** For people who have invoices that need to be paid, alerts appear in the right rail on the homepage. Users can log in from the alert, or X out of the alert. This is a good reminder in a highly visible location.

Entertainment Bulletin

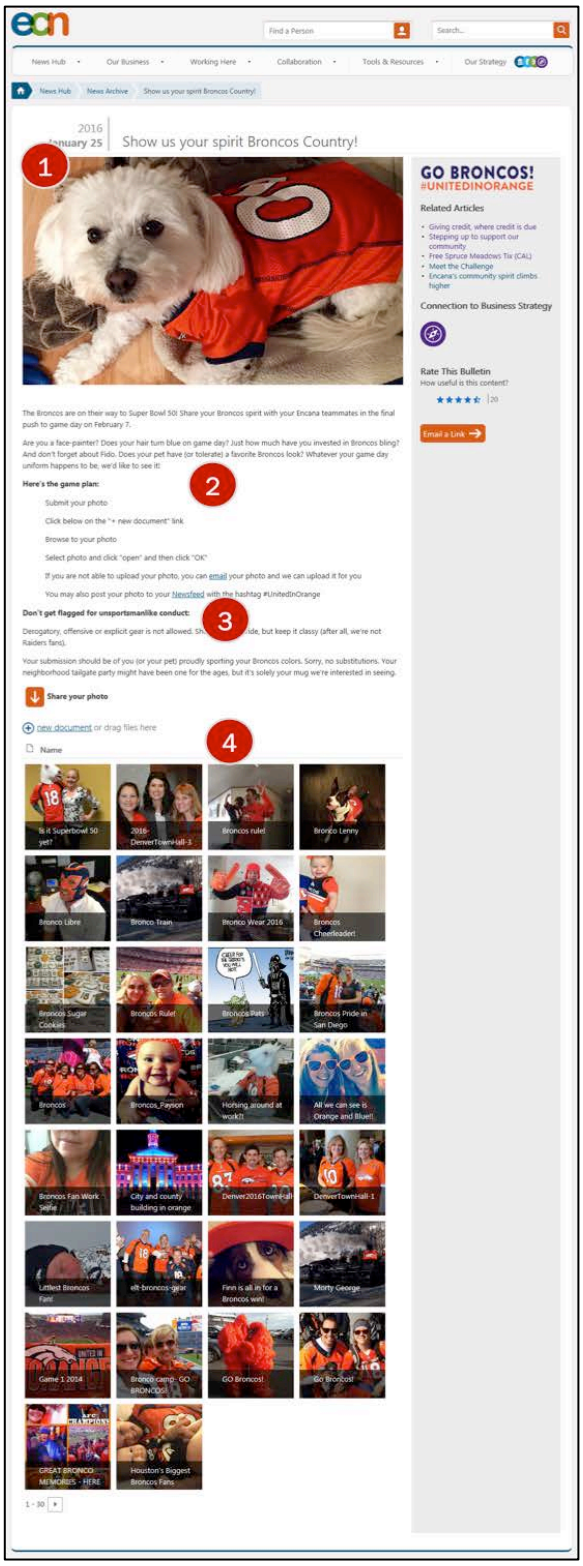


Image 16. Encana Intranet Entertainment Bulletin. A bulletin about the Denver Broncos enticed many people to post pictures and show team support. *encana_05_bronco_bulletin_staff_engage.png*

Entertainment Bulletin Highlights

Employees can create bulletins on the homepage and ask others to post comments and photos. Bulletin topics can be business-related or focus on entertainment and team building. These bulletins get people from across the company to engage and share with one another. This helps foster relationships inside (and even outside) the office. For example, in support of the Denver Broncos 2016 Super Bowl appearance, the bulletin above asked users to show their support by posting photos of Broncos football spirit.

1. **Showcased photo.** One photo is randomly selected each day to appear as the large photo at the top of the page. That photo also appears on the homepage.
2. **Instructions.** The step-by-step instructions help employees through the process of posting a photo. The steps are indented and easy to follow.
3. **Fun tone of voice.** The tone of this bulletin matches its purpose: to have fun and build community. For example, the instructions are labeled *Here's the plan*, while the image content warning recommends that users *Don't get flagged for inappropriate conduct.* The labels follow the football theme, reflect the section's light tone, and make participants feel welcome.
4. **Thumbnail photos with titles.** The photos are shown as thumbnails, so visitors can quickly scan them. This makes it easy to participate, even if you don't post a photo. And: showing many photos demonstrates high participation rates, which often entices more people to join in.

Business Bulletin

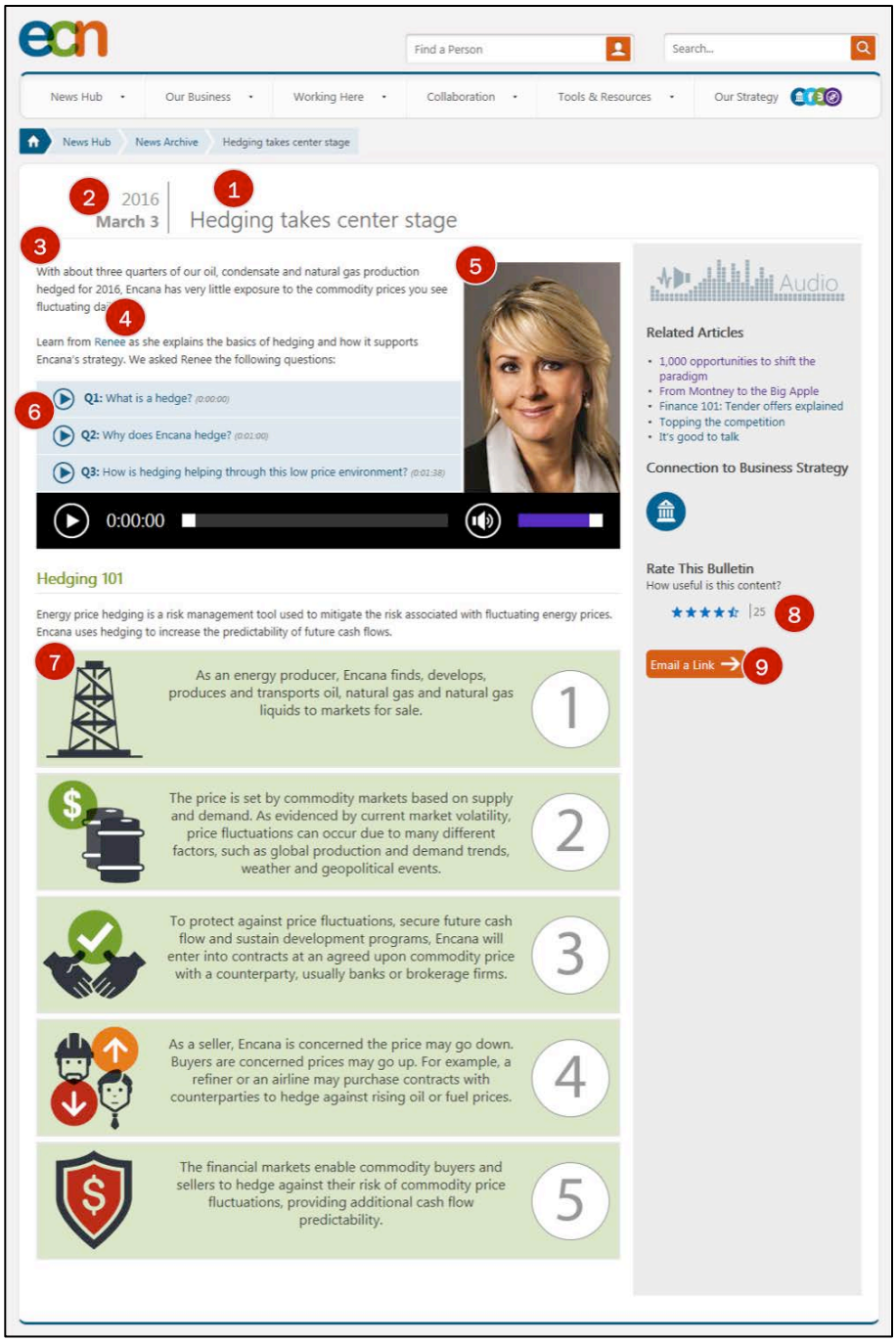


Image 17. Encana Intranet Business Bulletin. Offering information in an audio interview, divided by topic, and in a visual chart make "hedging" a digestible subject for employees on the Encana intranet. *encana_06_hedging_bulletin_audio.png*

Business Bulletin Highlights

As the image above shows, the Executive Vice-President of Midstream, Marketing & Fundamentals helped employees understand "hedging" by explaining it in an audio interview; an accompanying graphic reinforced the main ideas.

1. **Title:** A title of the bulletin provides some description of the topic
2. **Date:** The date is written in an international format, with the month spelled out.
3. **Description:** The text below the title is written to pique interest, offering a statistic about how much of Encana's resources were hedged in the previous year. This is a good way to get people to take the time to listen to the recording.
4. **Name:** The interviewee's first name appears in the description, which is less formal than using her full name and job title. Her name links to more information about her.
5. **Photo:** A photo of the interviewee makes the audio more personal, helping the user envision the person speaking.
6. **Three audio files:** The interview is broken up into three audio files, which puts fewer demands on people's time. They can listen to one topic at a time, and absorb it, rather than having to block out time to listen to the full interview (and probably tuning out at some point).
7. **Visual description:** The audio interview was reviewed and the process of hedging was outlined in five steps. The visual chart below the audio files describes these five steps, which reinforces what users hear in the interview. Or, if people look at the visual first, they might be inspired to listen to the audio. Either way, having both audio and a visual can help inspire people to learn about a topic.
8. **Rate:** Users can *Rate This Bulletin* and let colleagues know which content they find most interesting.
9. ***Email a Link*:** Another very helpful way to share a bulletin is to email a link to it. The orange button is a good way to remind people to share information with their colleagues.

Policies and Practices

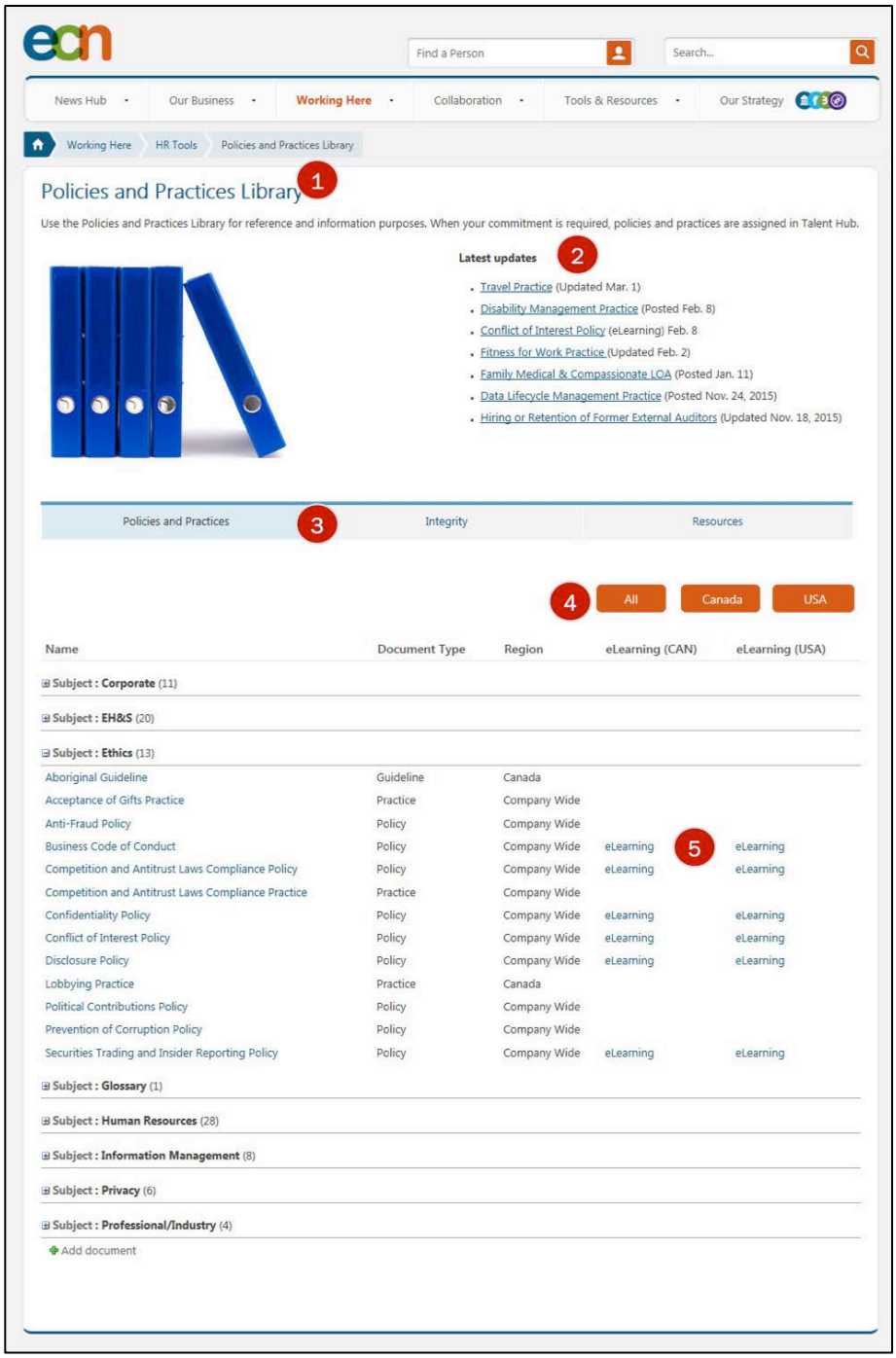


Image 18. Encana Intranet Policies and Practices. There is no need to spend time trolling around the Encana intranet with all of the policies consolidated in one place. *encana_07_policies_practices.png*

Policies and Practices Highlights

Employees should know what's expected of them in various situations. Rather than asking HR or their manager every time, the Encana intranet lets employees read and learn on their own. The *Policies and Practices Library* stores all corporate policies and practices, and serves as a learning and reference library. Content owners can easily control and update their own documents, and thus ensure that users see the best information for the company at any given time.

1. **Tile.** The page title, *Policies and Practices Library*, confirms to employees that they are in the right place. Breadcrumbs at the top are another way-finding cue.
2. **Recent.** The *Latest updates* section at the top lists links to the most recently updated policies, and includes a date when the update occurred. This helps people ensure that they are always referring to the most recent policy, and it helps prevent the mistakes that can happen when people use outdated information.
3. **Type.** Tabs for *Policies and Practices*, *Integrity*, and *Resources* appear below the updates. Employees can choose a type of document to refine the type of items they see. The selected tab appears in blue, while the others are gray. This is a helpful indicator.
4. **Country-specific.** Employees can filter information for the entire company or a particular location. Orange buttons for *All*, *Canada*, and *USA* make this simple, and metadata controls whether the document is for Canada, the US, or company-wide.
5. **Training.** When related eLearning materials are available for a policy or practice, these appear in the list and are included with the document. This helps inform employees about available training opportunities.

Tools & Resources

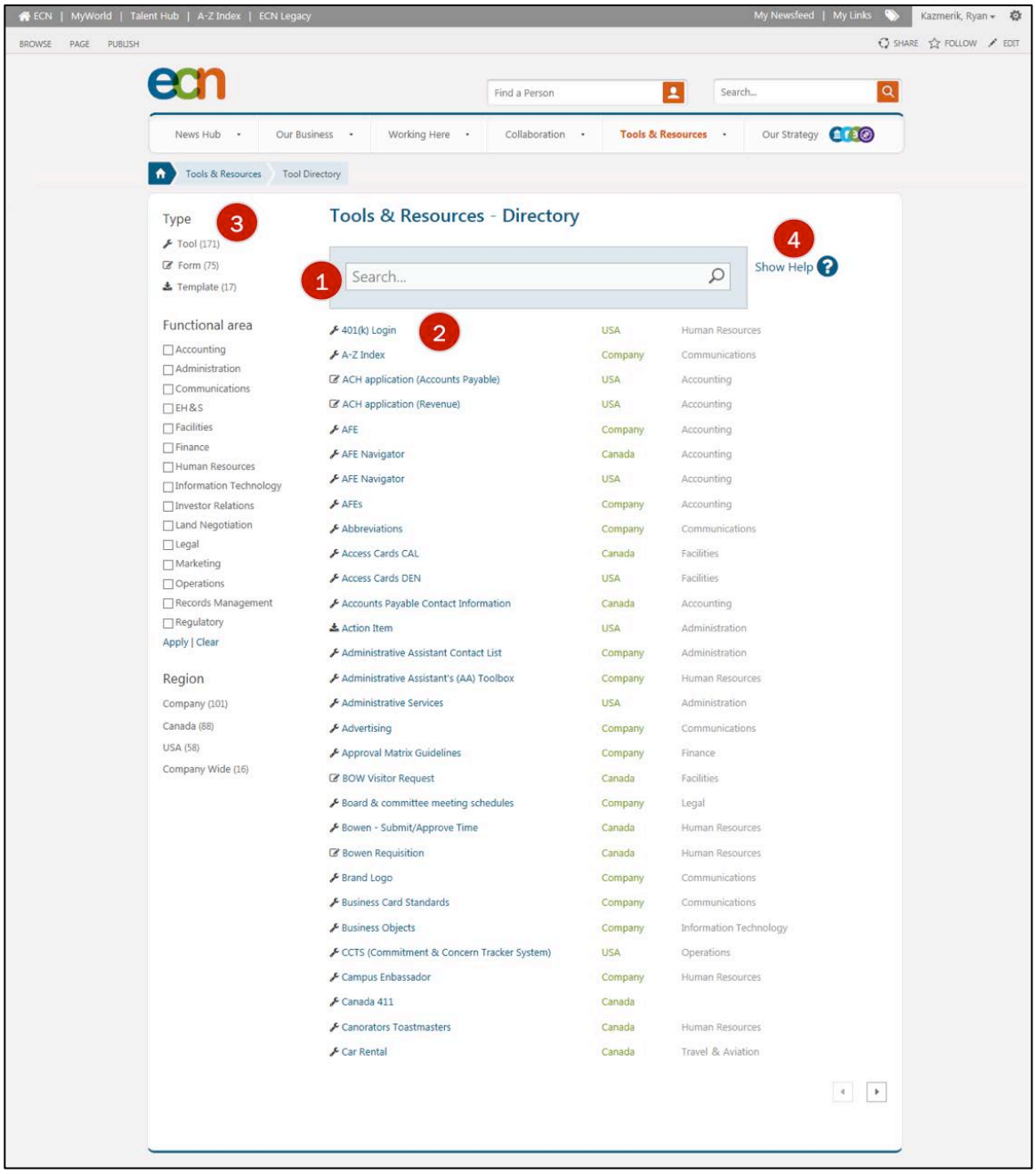


Image 19. Encana Intranet *Tools & Resources*. The company's *Tools & Resources* are searchable and sortable in a dedicated section of the Encana intranet. *encana_08_tools_resources.png*

Tools & Resources Highlights

People from across the company, in various business units, submit tools and resources for this directory. Crowd-sourcing this content takes the pressure off the intranet team to constantly inventory the tools people are using at the company.

1. **Search.** Users who know particular keywords can search for tools and resources using the open field. This standard search is helpful because it is expected. Its position on the page and much larger search field prevents it from being confused with either the employee search or site-wide search features.
2. **Alpha list.** Employees who know the name of the tool or resource they need can find it in the visible list, which is presented in alphabetical order.
3. **Filtering.** Users who know the media type or general area they need can select a *Type* or choose items in the *Functional area* list, respectively, to refine their search results. As new content is added to the directory, filters automatically become available.
4. **Help.** The *Show Help* text and question mark icon clearly indicate the help option. Clicking the link opens an on-screen overlay that describes the options users have for finding tools and resources.

Collaboration Site Directory

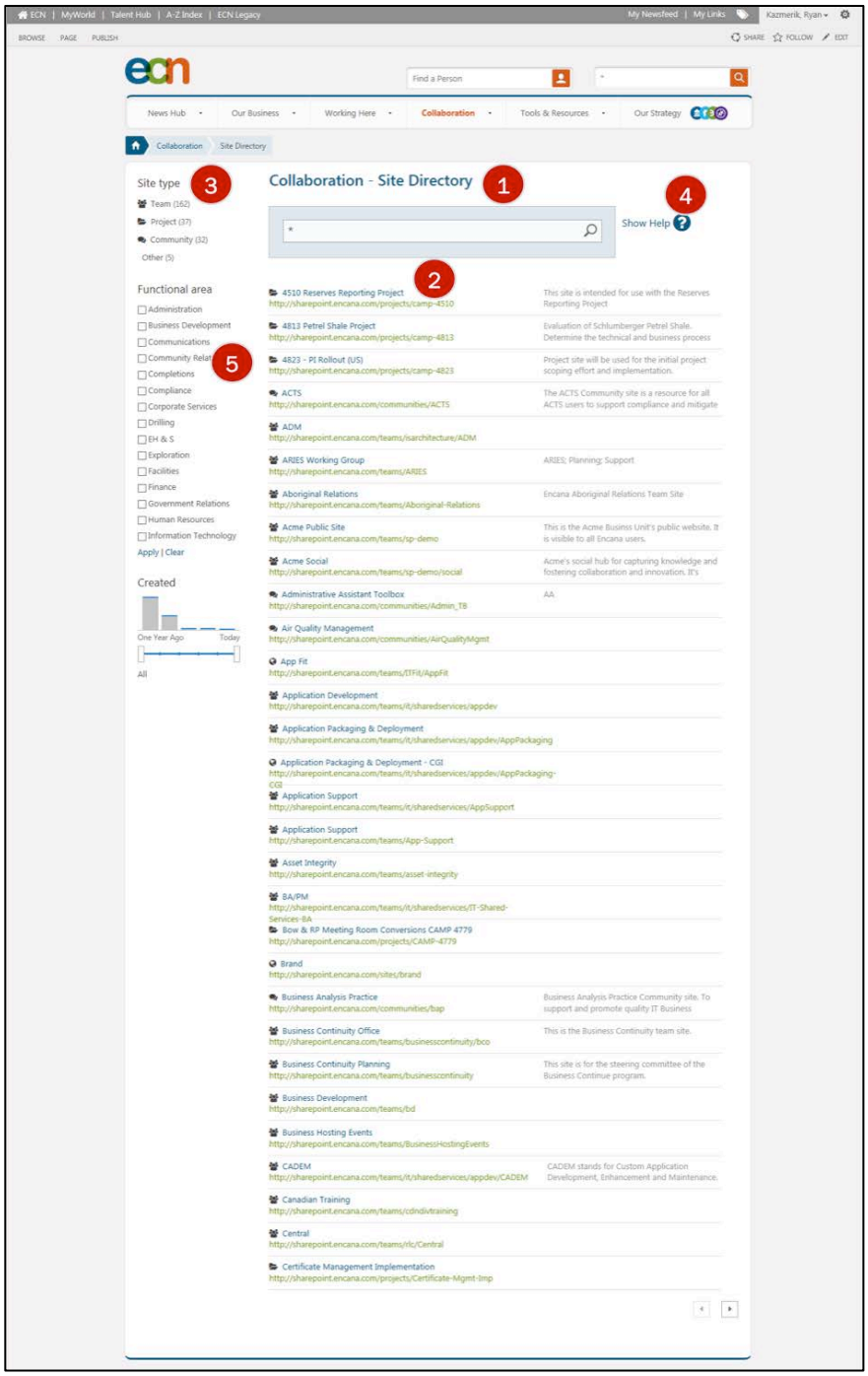


Image 20. Encana Intranet *Collaboration Site Directory*. A directory of all collaboration sites accessible to users helps them find the teams and topics they need. *encana_09_collaboration_site_directory.png*

Collaboration Site Directory Highlights

As on the *Tools & Resources* page, the *Collaboration Site Directory* helps people refine a long list of elements to find what they need. The page pattern is the same, but the content is different. In both places, the design helps users by providing

1. Search
2. Alphabetical list
3. Filtering
4. Help

The *Collaboration Site Directory* also includes the following:

5. **Iconography:** Icons to differentiate team, project, and community sites help users understand the kind of content they'll find in each site.

   Permissioned content: A site appears in the directory only if the user has access to it; this ensures that users see only what they should.

Help

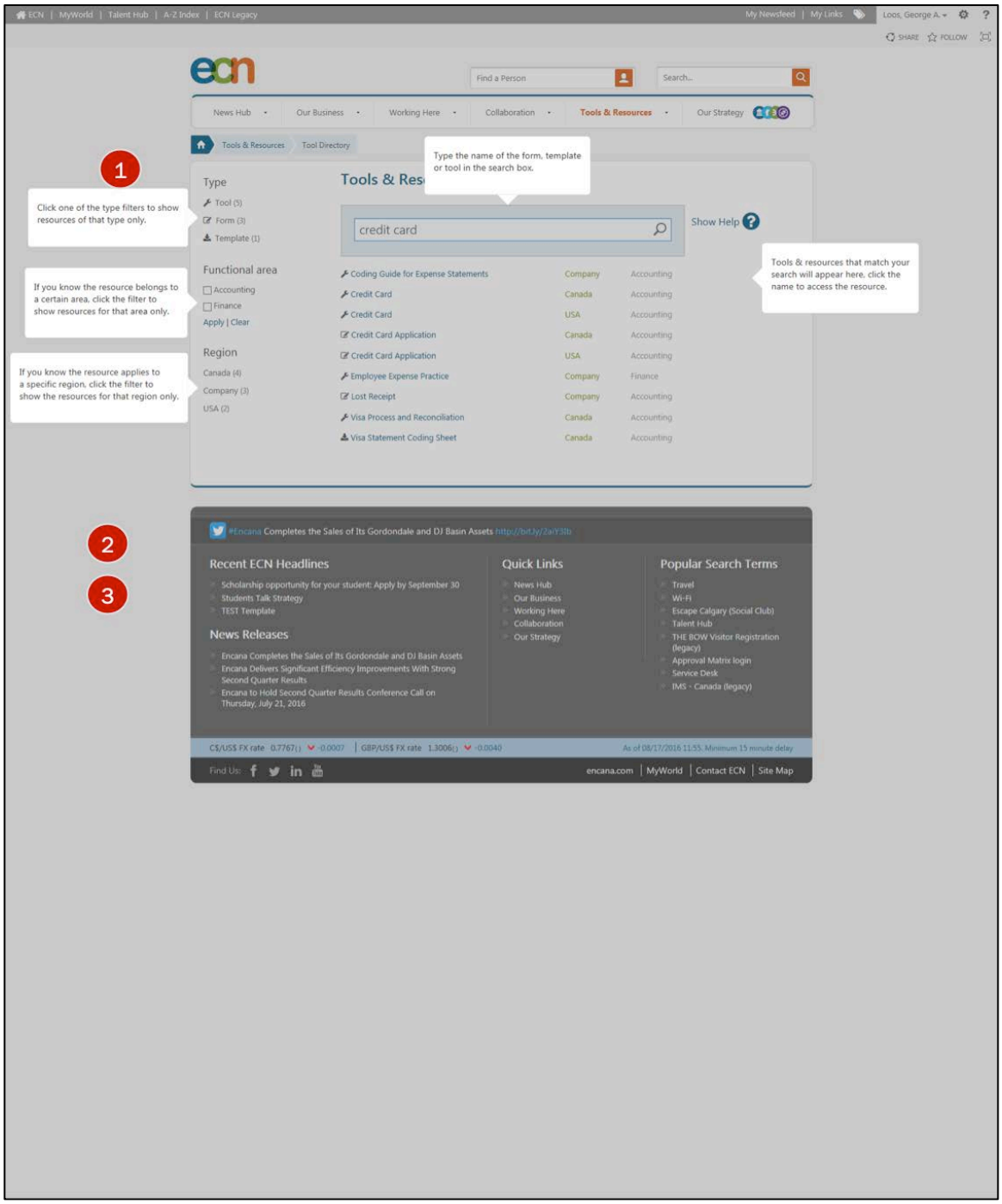


Image 21. Encana Intranet Help. A help mode grays the page and shows help text about specific areas. *encana_10_show_help.png*

Help Highlights

1. **Help bubbles:** The help bubbles contain instructions and information about each page area, teaching users how to filter and search.
2. **Gray:** The rest of the page turns gray, indicating that the intranet is in help mode.
3. **Exit:** Clicking anywhere on the page exits the help mode.

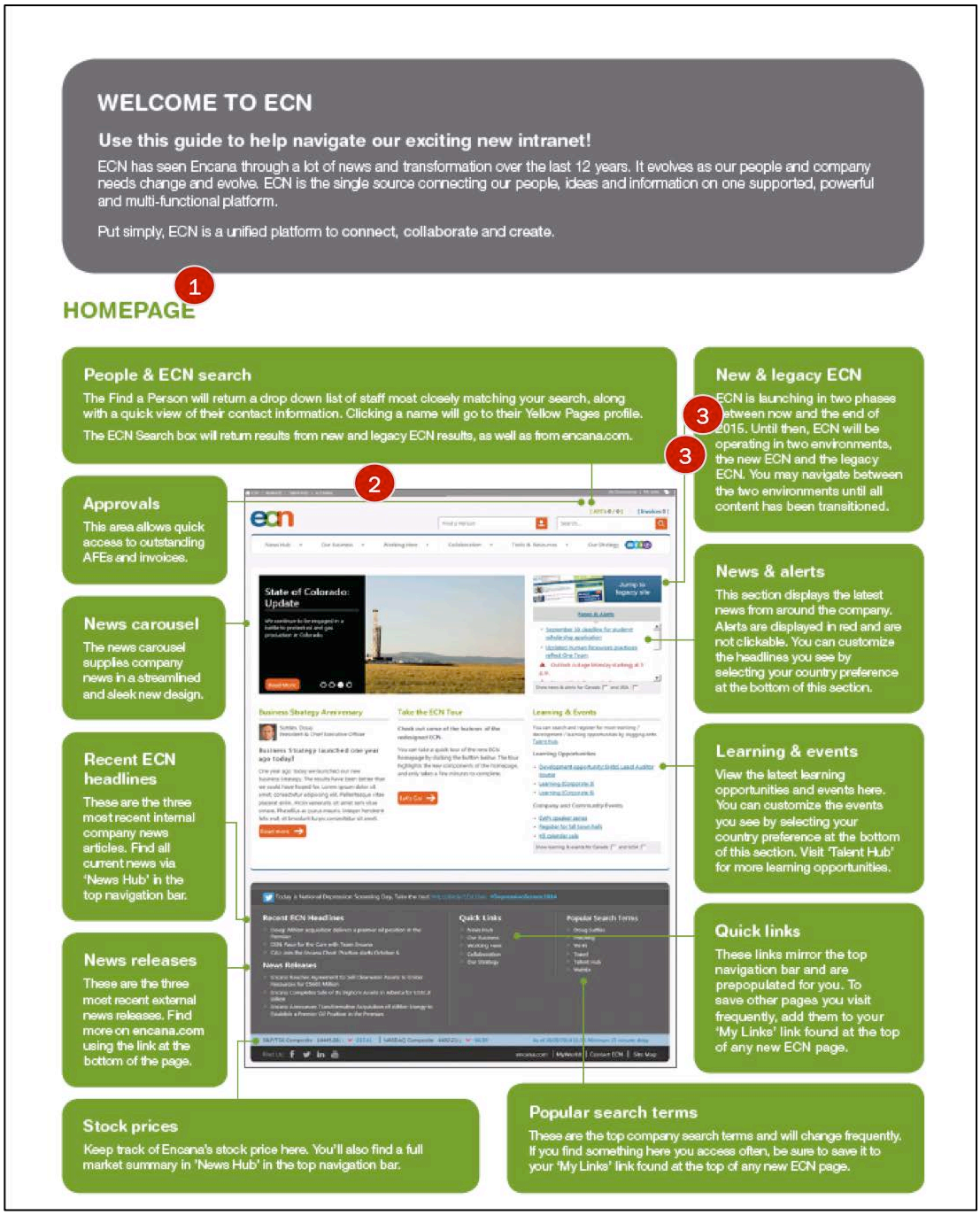


Image 22. Encana Intranet User Guide. The user guide provides help on many ECN sections, showing screenshots of pages with accompanying text that describes the features and how to use them.
encana_11_ecn_user_guide_sample_page.png

User Guide Highlights

The user guide was developed to teach people how to get the most out of ECN.

1. **Homepage help:** The user guide sample page above offers help about the homepage. The page title is listed at the top.
2. **Image:** The image of the homepage appears in the middle.
3. **Description boxes:** Descriptions are written in boxes, which appear around the homepage with arrows pointing to the areas described. The positioning of boxes and arrows helps users understand the area being described.

Project Site

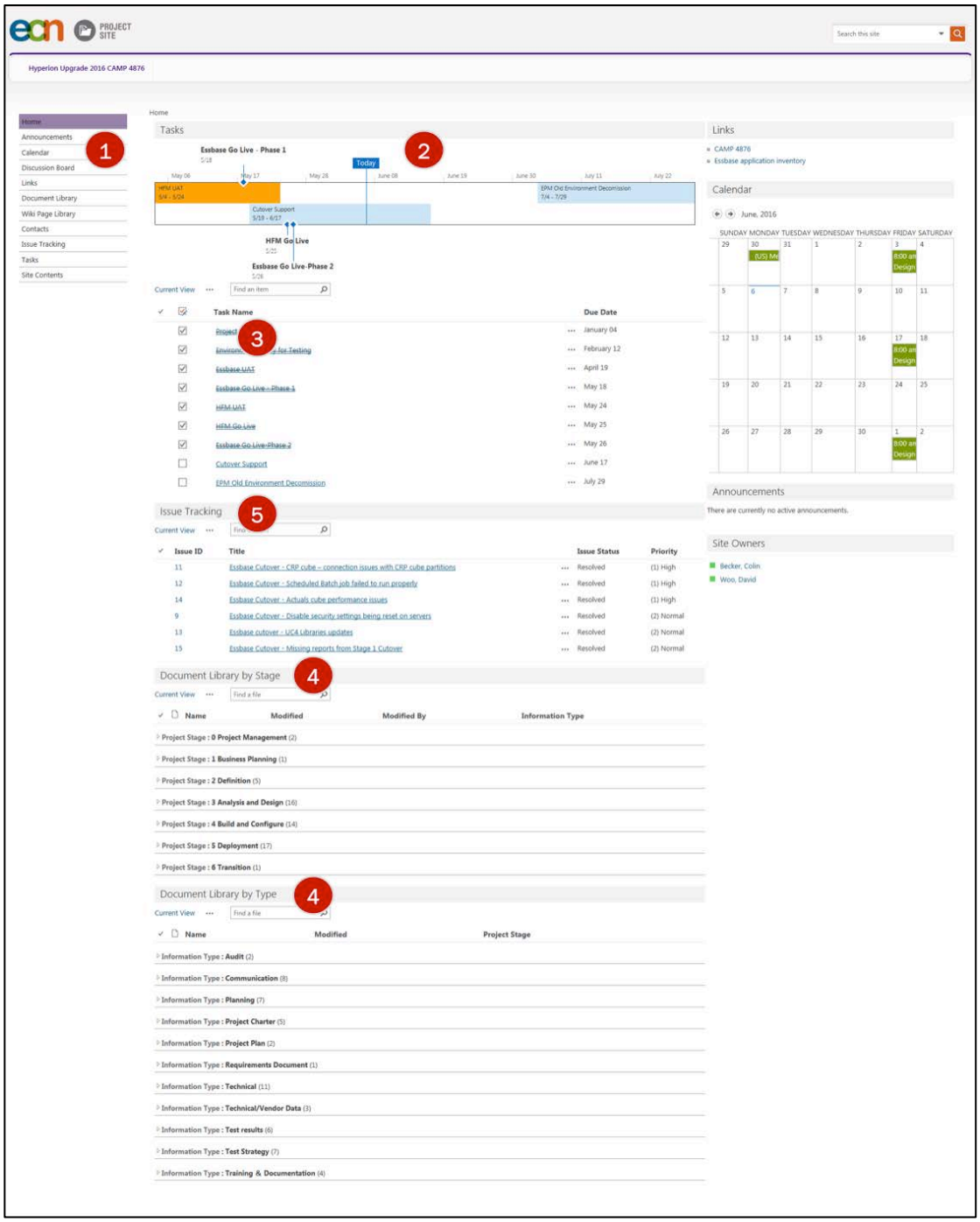


Image 23. Encana Intranet Project Site. Project team members can interact with tasks, the schedule, and several other project-related items. *encana_12_hyperion_project_site_live.png*

Project Site Highlights

Project sites enable project teams to stay on task and share knowledge. Teams use features standard in all ECN projects, including task lists, issue tracking lists, document libraries, discussion boards, tasks, announcements, and links lists.

1. **Views.** In the upper left, employees can choose from a list of items to view, including *Home*, *Announcements*, *Calendar*, *Discussion Board*, and *Links*. To help orient users, the selected item appears in purple, while other items appear in white.
2. **Tasks.** The tasks are consolidated by week in the chart at the top of the page.
3. **Completed tasks.** Items with a strike-through are completed tasks; this lets users easily see which tasks have been done.
4. **Document library.** The document library is located directly within the site for easy access, and uses metadata to group, sort, and filter documents so that users can find the right document quickly. The two most commonly used views for the library appear on the page, and each has a small search field to increase efficiency in retrieving documents.
5. **Issue tracking.** A list of tracked issues on the landing page with associated status and priority works well to ensure the whole project team can understand and follow the progress of known issues within the project.

AdminToolbox Community

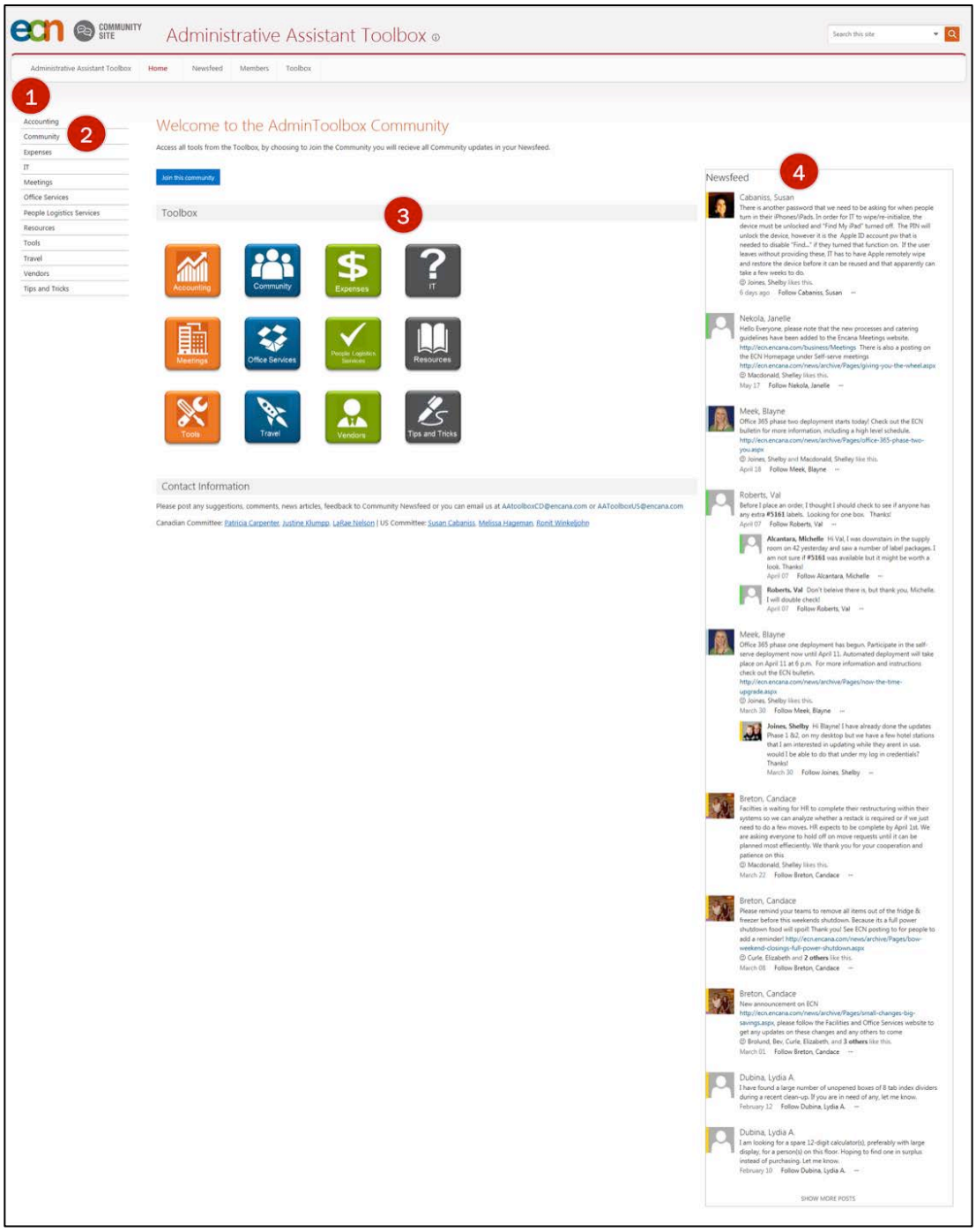


Image 24. Encana Intranet Admin Community. Administrative-related tools are consolidated in a community of practice on the intranet, which also lets users write news items and share their knowledge.
encana_13_admin_toolbox_community_site_live.png

AdminToolbox Community Highlights

The AdminToolbox site gives staff members resources and support that span business units.

1. **Topics.** The left side navigation links lead to general topic areas including *Accounting*, *Community*, *Expenses*, and *IT.*
2. ***Community*.** Community membership lets staff members contribute to the site. A listing of available members provides a built-in community of practice where staff can become familiar with people in other business areas who perform similar functions, and can reach out for support or assistance when needed.
3. ***Toolbox*.** Icons with links lead to the most commonly used tools for people in the community. The page makes it easy to find many of the tools users need every day.
4. ***Newsfeed*.** Many ECN Community Sites have newsfeeds specific to their community members. Any member can post and reply in the newsfeedcurrent information, learnings and questions, and offers feedback from diverse community members. This type of interaction allows for a cultural shift, empowering users to overcome organizational barriers and look to each other to answer questions and find solutions.

Image Search

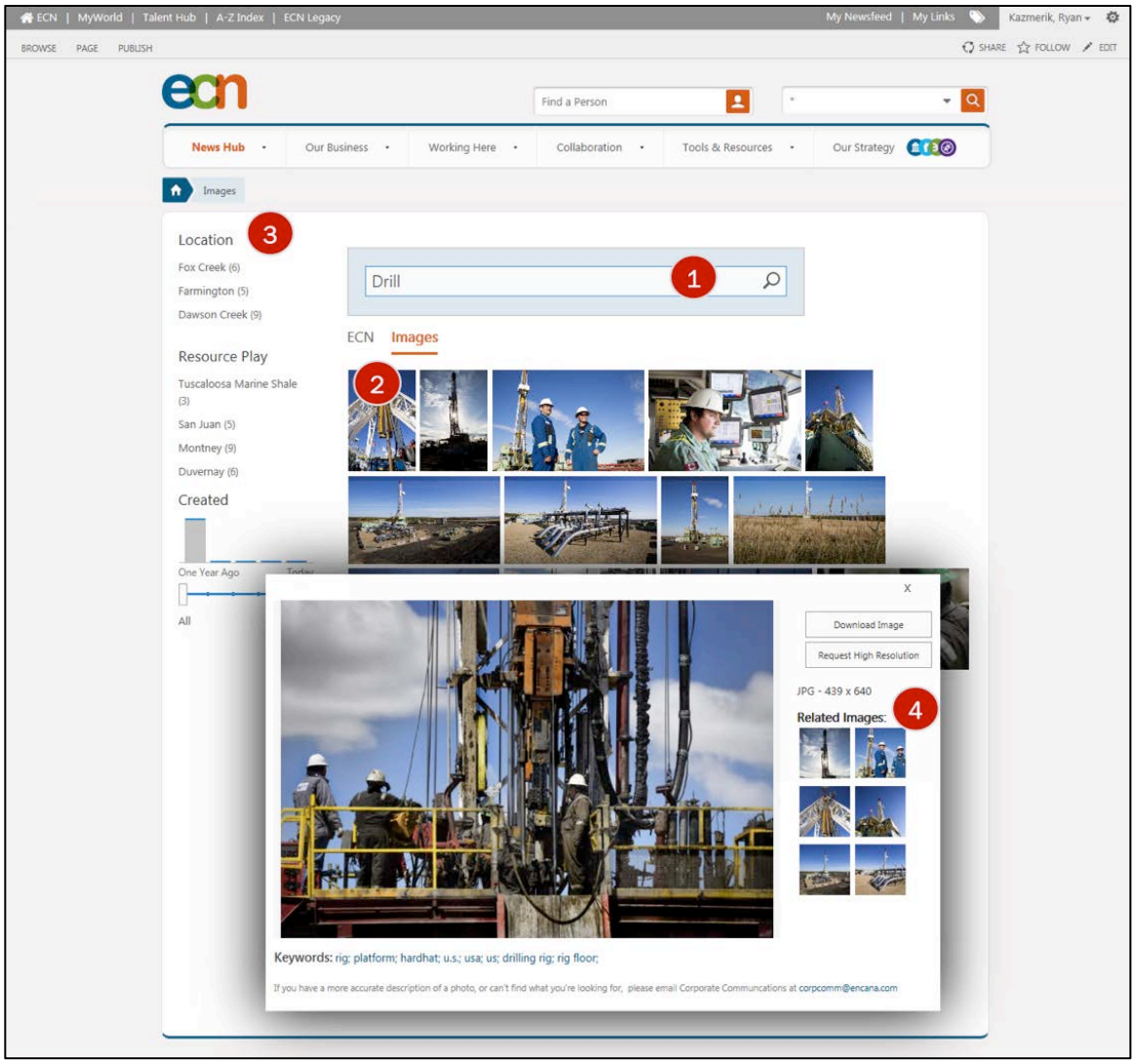


Image 25. Encana Intranet Image Search. Keywords return results of related images, which users can download or request in higher resolution. *encana_14_image_search.png*

Image Search Highlights

Images are a powerful way to get a point across. ECN provides an image library that employees can search; images are all described and tagged, making them easy to find.

1. **Attributes.** Employees can find images by their properties. For example, users can search for only JPG format images, or images that have a specific resolution, such as 1024 X 780.
2. **Results.** Thumbnail versions of each picture are displayed in a dynamic, flexible grid that lets users visually refine what they're looking for quickly.
3. **Filters.** Users can refine the image search by traits such as *location.*
4. **Related images.** Users can view similar images in a pop-up panel. This also displays the image in a larger size, and provides one button to *Download Image* and one to *Request High Resolution.* These services are helpful for people interested in any of the images.

DESIGN PROCESS AND USABILITY WORK

Approach

The project team's approach was largely influenced and impacted by ongoing organizational change, project team turnover, stops and starts, and a few project resets that forced the team to find new sponsors and clarify goals. As a result, the team wisely adopted an Agile development model, which allowed some team members to focus on a series of incremental, iterative tasks that empowered the remaining project team members to collaborate and make decisions independently. At times, this approach also let them move forward faster rather than wait for executive sponsor sign-off.

Project Sprints

With the goals, objectives, and benefits clearly identified, a cross-functional project team and various working groups were established to complete the following project phases. These phases were managed through a series of sprints that followed an iterative process. Each sprint kicked off with a planning session that let the team review requirements, assign tasks, identify resources, and begin engaging key stakeholders. At the end of each sprint, a milestone or subgoal demonstrated success and provided the scaffolding for the sprints that followed. Each sprint lasted three weeks; sprints 3 and 4 ran concurrently, as did sprints 5 and 6.

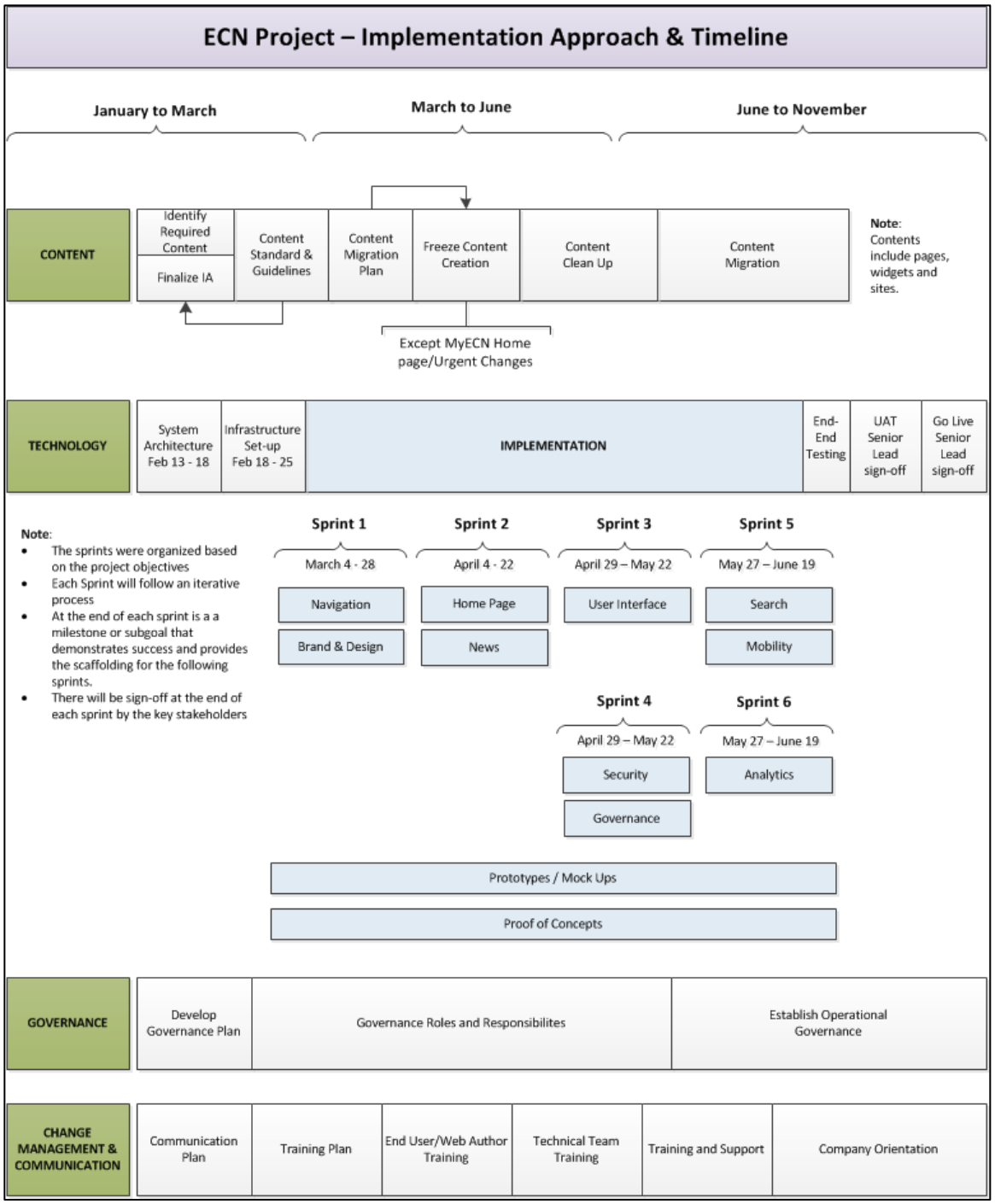


Image 26. Encana Intranet Implementation Approach. Diagram of the Encana team's implementation approach for the new intranet. *encana_15_implementation_approach.png*

Following is an outline of the work accomplished during each sprint.

Sprint 1: Project Scoping

- **"As is" analysis:** Multiple inventories and a review of processes, technologies, and content.
- **Visioning:** Numerous discussions to determine the high-level vision for the intranet, web content management, the design, and the project implementation approach.
- **Raising awareness:** Knowledge sharing of industry best practices for intranets (process, governance, and technology) and for existing Encana SharePoint governance models, as well as models that might accommodate where the company is headed.
- **Requirements definition:** Translate the vision into requirements and defined scope.
- **Implementation planning:** Approach and migration planning.

Sprint 2: Audit and Definition

- Analyze the current intranet platform and collect requirements
- Document current business processes
- Document current site structure
- Audit portal categories (widgets and small applications)
- Audit site pages on the existing intranet (site ownership and analytics)

Sprint 3: Information Architecture

- **Site map and navigation prototype:**
  - High-level IA document illustrating navigational structure for the entire site
  - Initial navigational prototype(s)
- **Content strategy:**
  - Audit intranet content
  - Content strategy report
- Functional prototype with high-level wireframes
- Functional user-based specifications
- Usability testing

Sprint 4: Design and Prototyping

- Numerous technical activities, including: categorize and create high-level designs for custom web parts for the new SharePoint platform and design the interface
- Content classification model (metadata strategy) for top-level navigation
- Webpage wireframes
- SharePoint architectural design (including site collection design)
- Search strategy design
- Navigation prototype
- Content templates
- Interactive Axure prototype illustrating page-level interface for each relevant template
- Informal usability testing
- Informal report and recommendations on results of "hallway" testing
- Governance recommendations document
- Revised prototypes
- Updated and finalized prototypes based on internal and client review

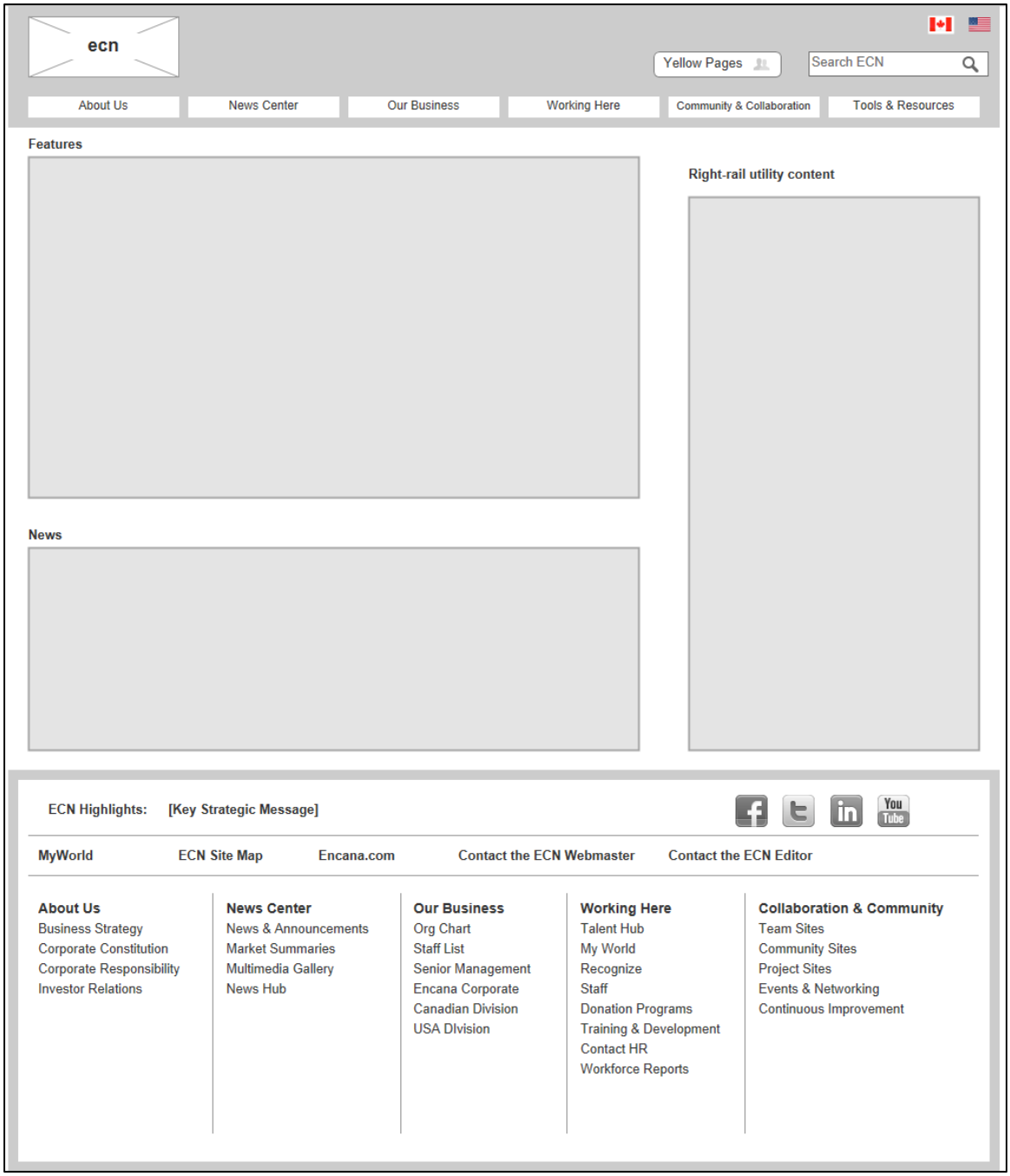


Image 27. Encana Intranet Homepage Wireframe. A wireframe of the new homepage. *encana_16_homepage_wireframe.png*

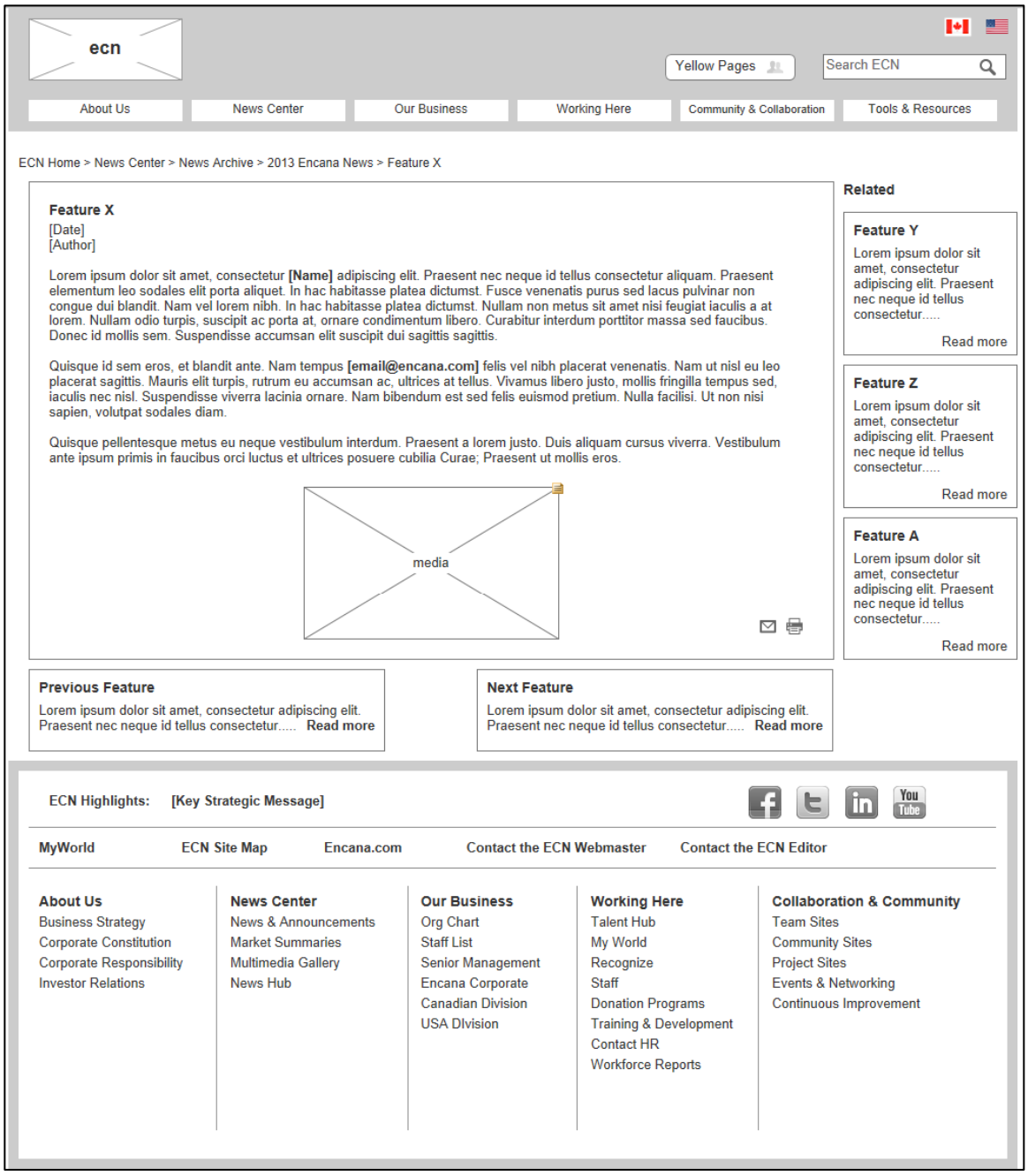


Image 28. Encana Intranet Article Page Wireframe. A wireframe of an article page. *encana_17_bulletin_wireframe.png*

Sprint 5: Implementation

- Implementation was broken down into six separate sprints, each organized based on project objectives:
    - Navigation, brand, and design
    - Homepage and news
    - UI
    - Security and governance
    - Search and mobility
    - Analytics
- Each sprint kicked off with a planning session to review requirements, assign tasks and identify resources, establish testing and success, and engage key stakeholders
- The project team was divided up and assigned key accountabilities:
    - **Content analysis:** Due to the enormity of the project and the number of sites, a separate team of people analyzed content and assisted the working team in developing a site migration approach.
    - **Design:** Delivery of IA, design, and implementation.
    - **Governance:** Delivery of an evolving governance plan for ECN.
    - **Communication and change management:** Communication to stakeholders and clients in support of the project.

User Research

The team conducted a number of user research activities, with the following goals in mind:

- Identify key known issues and gaps with the existing intranet
- Define overall recommendations from internal stakeholders and intranet users related to site architecture, content, features, and functionality
- Document strategic direction and key business goals related to the intranet
- **Content analysis.** Due to the enormity of the project and the number of sites, a separate team focused on analyzing content and assisting the working team in developing a site migration approach. Key areas of focus included the following:
    - High-level content audits and mapping of all sections back to the business

- Web metric reports and forensic audits to help determine content that could be culled immediately and provide some quick wins
- Content audits workshops and presentations
- Content delivery plans

- **Usability testing.** As part of the redesign project, UX Guys conducted a usability test on a prototype of a new ECN structure. The goal of testing was to explore ease of use of the new navigation scheme and overall site structure before the ECN framework was developed further. UX Guys conducted 10 usability interviews with Encana employees. The participants represented a range of years of service and position types, and were located in various Canadian and US locations.

  The team's objectives for this first research phase were as follows:

  - Identify key known issues and gaps with the existing intranet
  - Define overall recommendations from internal stakeholders and intranet users relating to site architecture, content, features, and functionality
  - Document strategic direction and key business goals related to the intranet

- **Stakeholder interviews.** These interviews were one of the early exercises the team used to help gather requirements and collect feedback. The team interviewed various internal stakeholders and intranet users at Encana to understand how it could better organize and present information in a future version of ECN.

  Interview logistics were as follows:

  - **Format:** 11 interviews total, up to 30 minutes each.
  - **Canadian locations:** Four participants were in the Calgary office, two part-time between Calgary and the field offices, one in the field office.
  - **US locations**: Three participants were in the Denver office, one in the field office.
  - **Roles:** Three participants were site users only; eight were users who also had some responsibility for producing site content.
  - **Tenure:** Participants' tenure at Encana ranged from 2 months to 32 years, with the mean being approximately 5 years.

  Each participant was asked the following interview questions:

  - "Please briefly describe your roles and responsibilities at Encana."

- "How frequently to do you use the Encana intranet (e.g. hourly, daily, weekly)? How much time do you spend on the intranet when you do visit?"
- "In which areas of the intranet do you spend most of your time? More specifically, what type of content do you most typically find on the intranet?"
- "What are some common tasks that you perform on the intranet?"
- "What are your typical navigation methods on the intranet — do you use the top menus, or do you use search?"
- **Pain points:** "What are some aspects of the intranet that, in your opinion, do not work?"
- **Good points:** "What are some aspects of the intranet that, in your opinion, do work well?"
- "What are some features, content, or functionality that you think are missing, that should be included in the intranet?"

From these interviews, the team began to identify and prioritize key recommendations, including the following:

- **IA:** ECN needs a more coherent IA and more usable navigation; once users leave the homepage, confusion reigns.
- **Content:** Old content needs constant pruning; there is also a need to establish (and enforce) governance rules.
- **Personalization:** The team needs to explore personalization features as a means of serving multiple audiences more effectively.

- **Personas inform the IA design.** To define the UX, team members needed to understand the key stakeholders and their very diverse needs — that is, what they do in their jobs, what they need to support their work, and how they will interact with the intranet. This was accomplished by creating persona profiles for each stakeholder group. These profiles provided a way to identify and understand how each user type would perform his/her tasks on the portal. Some of the personas they created were for site users, content managers, content publishers, communication advisors, and field staff.

  Once the persona profiles were established and users were recruited to represent each persona, team members began the hands-on UX research, which included in-depth interviews to understand user requirements and pain points. They also identified navigation and browsing methods, content publishing processes, and any challenges users experienced along the way. "This was exactly what we needed to bring light to a number of key problems with the existing design and content organization," says Ben Nwachukwu, IT Analyst. These problems included the following:

- Inconsistent landmarks or signposts throughout the portal, which caused users to easily become lost while navigating
- Lack of clear distinction between different main categories in the top navigation
- Multiple links to the same content from different navigation points
- Poor search experience with ineffective search results
- Confusing localization; users clicking on links sometimes unexpectedly navigated between the otherwise separate Canadian and American intranet portals

Notable Research Findings

Team members gathered many useful pieces of information from their various research efforts. Some of the notable research findings included the following:

- **Navigation was improved.** Users felt the new navigation and layout was easier to use and more intuitive than the current ECN.
- **Customization was highly valued.** Users really valued the ability to create their own quick links and most-used pages; they also appreciated customizable platforms such as MyWorld and Myhub.
- ***Tools & Resources* was a major win.** This section got the most traction and appreciation; users felt it was a really useful hub.
- **Redundancy could be reduced.** Participants sometimes appreciated redundancy in links and access to information; at other times, they found it confusing.

Other Research Activities

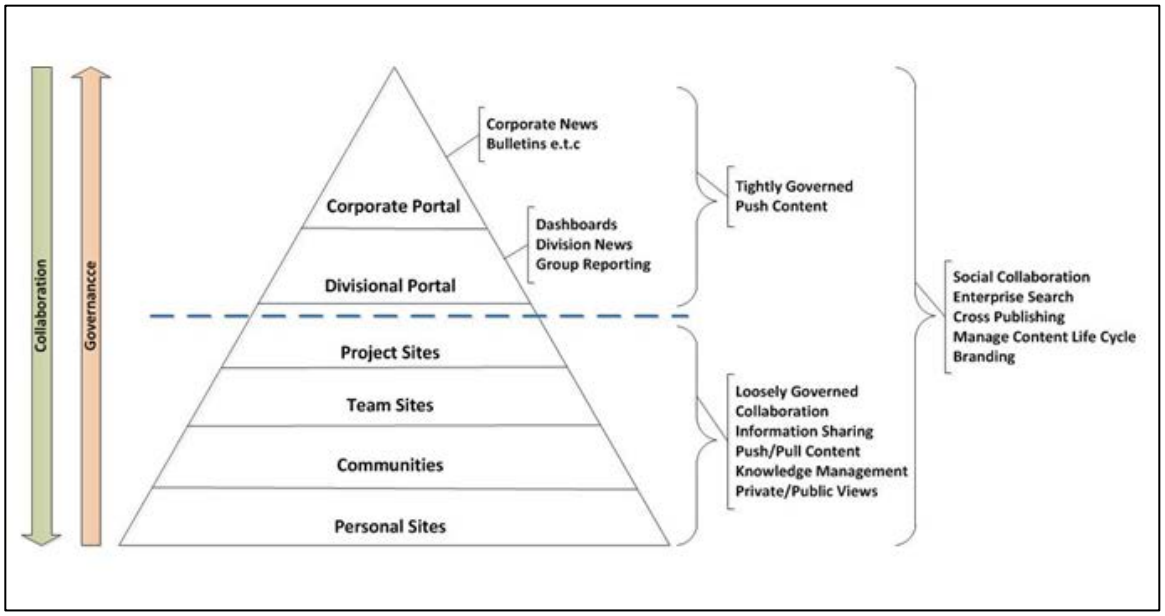
Because SharePoint had been introduced into the Encana environment a few years earlier, it was selected as the replacement portal technology. This eliminated the need to research portal technology options, but the team nonetheless invested in the following activities:

- Reading and discussing previous editions of NN/g's Intranet Design Annual
- Participating in monthly Web Communications Meet-ups with peers in the energy industry
- Gathering and analyzing best-in-breed research material from some of the company's vendor partners, such as Gartner PeerConnect
- Capturing and analyzing web metric data from the existing intranet
- Capturing and documenting existing as-is business processes
- Capturing and prioritizing critical business requirements and clarifying the intranet's scope

Developing a New IA Strategy

The team took all of its user research findings and developed a new strategy for re-architecting the intranet's content, following two simple guiding protocols: governance and collaboration. These protocols would allow them to manage the architecture better from the start, as well as to plan the functionality and usability that users needed.

The first task in this process was to envision a high-level structure for governing the intranet experience. They separated the intranet into two major areas: enterprise-level corporate content, and user-driven collaborative content. The enterprise-level corporate content was to be tightly controlled and highly driven by corporate content pushed to all staff. The collaborative content area was to be less controlled, empowering end users to collaborate and share knowledge through a more organic, decentralized approach.



A diagram of the Encana intranet IA.

Many of the navigation problems were tied to the old portal's IA, which was hierarchical in nature and based on the organizational structure. This approach made it difficult to adapt intranet sites to ongoing organizational changes. Architectural changes were often difficult to implement because of the pain, stress, and time involved in cleaning up and updating the nested sites. As a result, the portal's duplicated and outdated content was increasing, as was a deeply rooted folder structure on the back-end. This created growing frustration among users and support staff, because finding and managing information on the portal was both tedious and time consuming.

To address these navigation issues, team members conducted several card-sorting exercises with stakeholders. They identified the appropriate navigation labels and decided how to group and organize information for more intuitive and usable

navigation. This process was followed by usability testing with different end users to validate the proposed navigation menu.

This proposed architecture, derived from the feedback, comprised six major corporate content categories (see below). The proposed structure's conceptual model takes a user-centered approach as it moves through the different levels of relationship between staff members and Encana leaders, as well as between teams and other groups that work together within the company.

PROPOSED CONTENT CATEGORIES FOR NEW INTRANET	
Content Category	**Description**
News Hub	Top-down communication of news and other key organizational announcements from Encana leadership to all employees
Our Business	Information about the company, including strategy, leadership, corporate reports, and org charts, as well as business group information specific to Encana's divisions, business functions, and departments
Working Here	Content relevant users (employees or contractors), including HR contacts and benefits, wellness, and career development information
Collaboration	An unmoderated site collection where Encana teams and groups control and manage their own unique workspaces in order to organize and plan tasks or events, share information, hold discussions, and collaborate on work with colleagues and teams
Tools & Resources	An aggregation of links to popular and/or useful content that helps staff members do their jobs more efficiently or effectively
Our Strategy	Key information about Encana's business strategy

Buy-in

The company experienced big changes in leadership and project management during the project; this resulted in some inconsistencies in the level of corporate commitment or buy-in for the redesign. Each change resulted in adjustments to the scope, work, or approach, yet despite all this change, the team forged ahead; by the end of the project, company leadership was on board and fully supporting the launch of the new ECN.

With that critical leadership support in place, the team designed a successful launch campaign to build interest and introduce staff to the new portal features. The campaign created considerable buzz across the company and included both advertisements and informational documents including the following:

- **Migration project site.** This site helped communicate and provide updates throughout the migration process. It included announcements, a project overview, FAQs, and a list of recently migrated sites.
- **Posters.** Posters were put in all of the company's mailrooms.
- **Introductory bulletin.** An introductory bulletin welcomed visitors to the new site and highlighted its new features.
- **Change bulletin.** This bulletin explained site changes and where users could get help. The bulletin attained 95% readership and was a great resource for the staff.
- **User guide.** The user guide provided easy-to-follow instructions on how to use some of the new features.

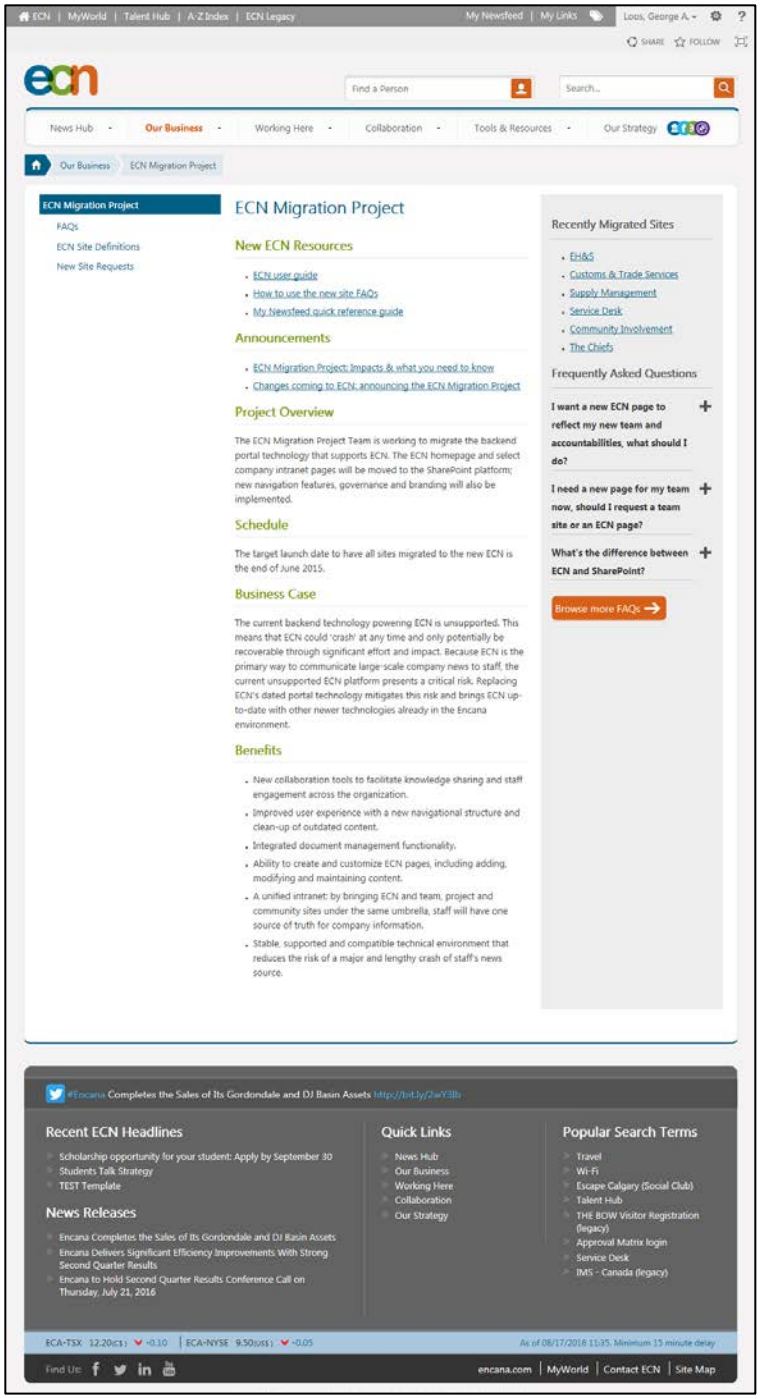
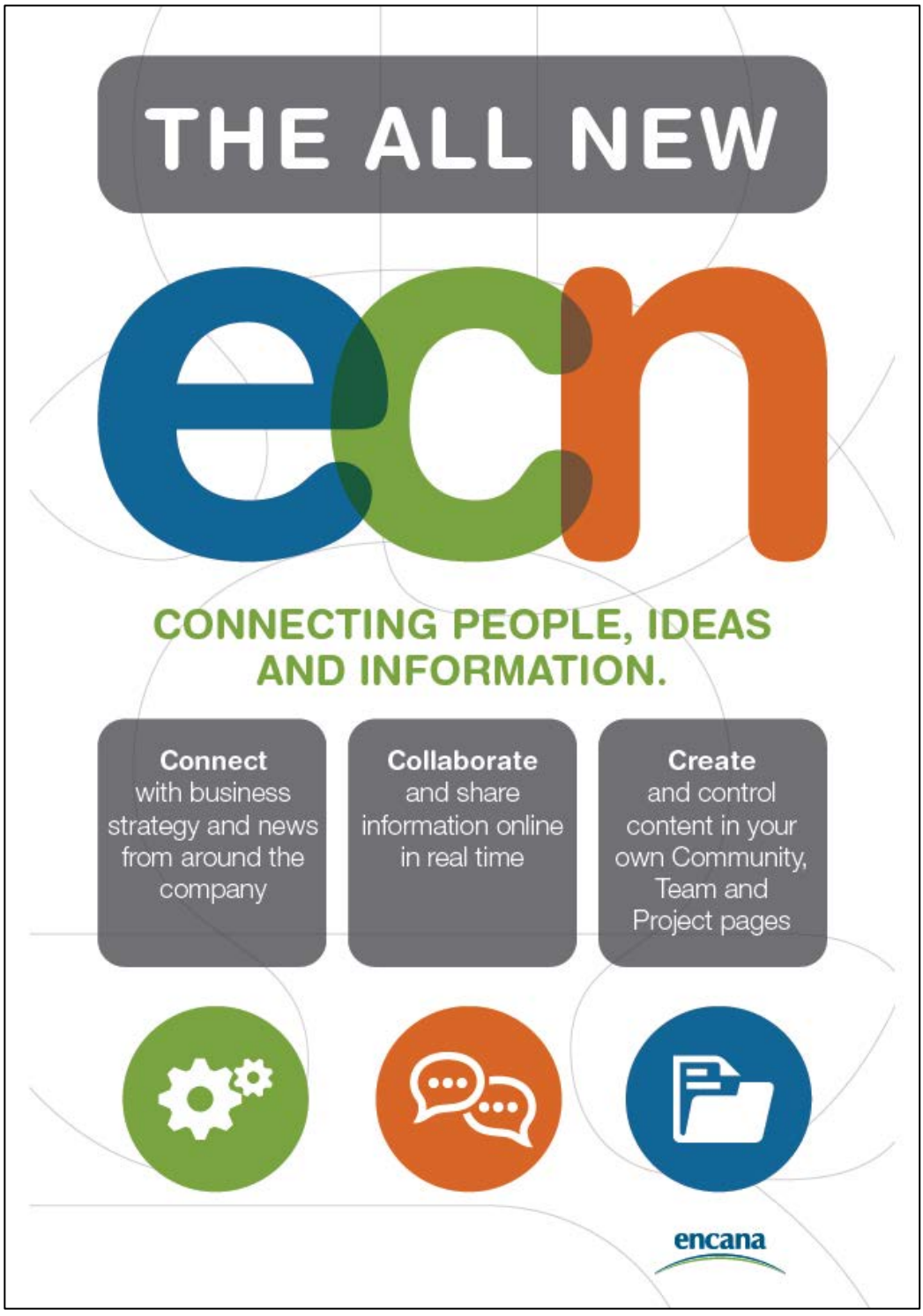


Image 29. Encana Intranet Migration Project Site. The Encana team created a site to help communicate and provide updates about the migration process, announcements, a project overview, FAQs, and a list of recently migrated sites. *encana_18_migration_project_site.png*



This mailroom poster was used to support the launch of the new Encana intranet.

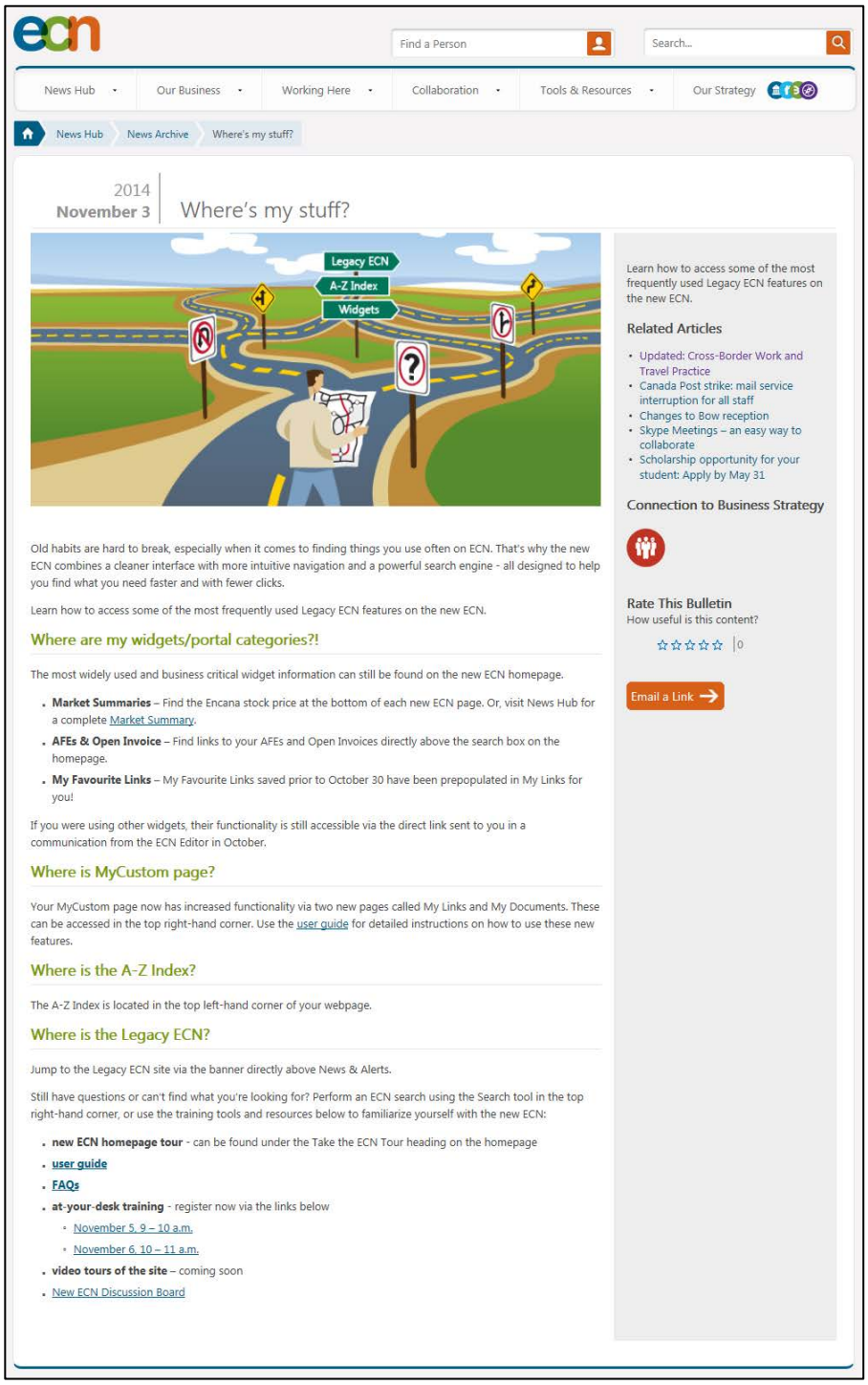


Image 30. Encana Intranet Launch Article. This article supported the launch of the new intranet. *encana_19_bulletin_wheres_my_stuff.png*

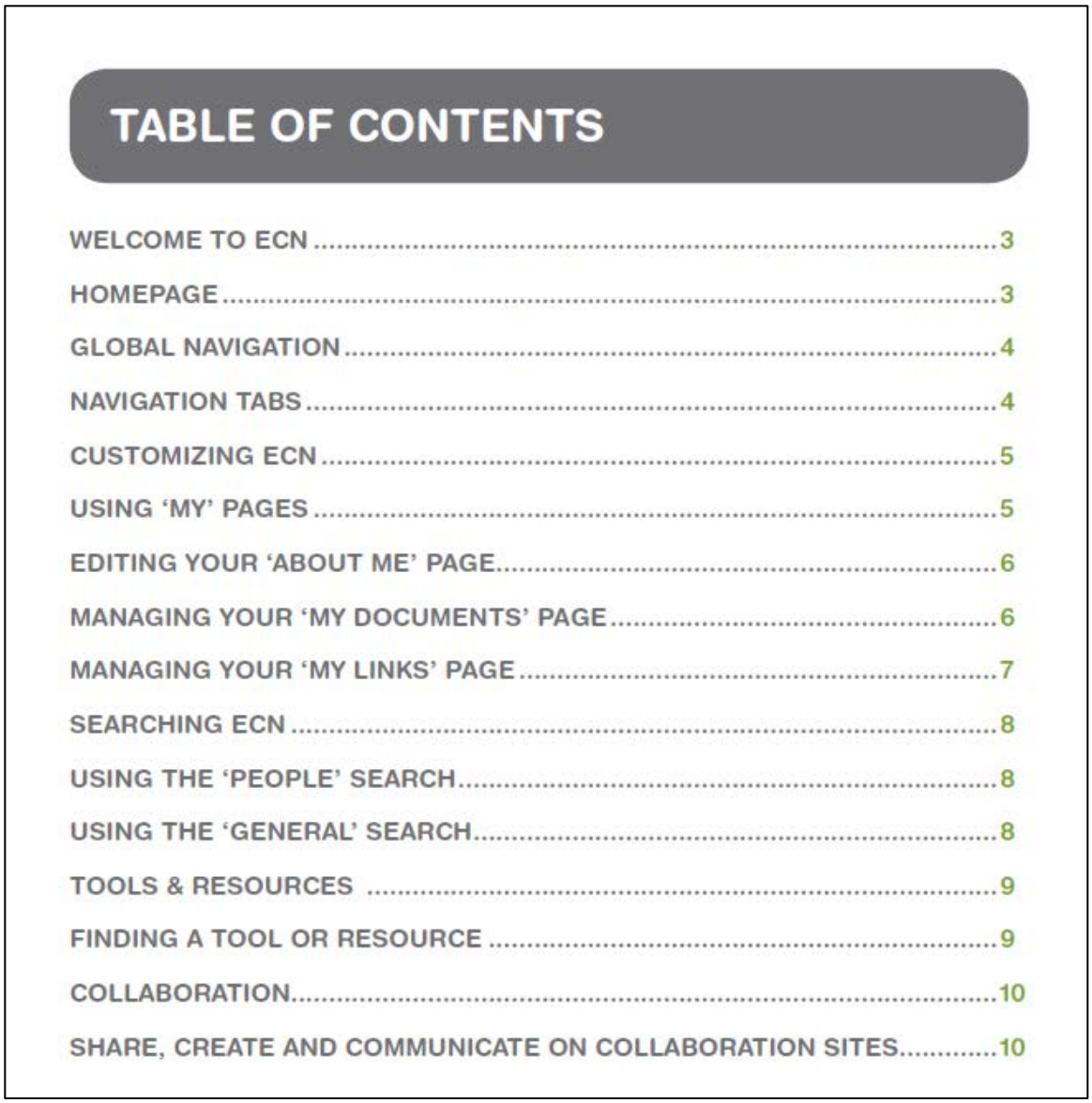


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The user guide's *Table of Contents*. The ECN team created the user guide with easy-to-follow instructions to help staff members learn how to use some of the new intranet's new features.

Adoption

The adoption process has spanned almost two years and is an ongoing work-in-progress for both the users and site owners.

It didn't take long for users to start navigating to enterprise sites looking for information and using collaboration sites to work together in teams. As content was migrated to the new portal, more and more teams and groups were enticed to initiate their own projects to migrate or build out their content. However, the intranet

team is still working on getting users to embrace SharePoint's social features, including discussion boards, my site, newsfeeds, and tagging.

The adoption rate for site owners and contributors suffered a bit at the beginning because the organization didn't have change management practices in place. This meant that more collaboration sites than it would have liked went stale or inactive because site owners were not maintaining them. The intranet team tried to establish a site owner community that met monthly to discuss site tips, issues, and best practices, but it wasn't sustained. It also built a learning portal, the *SharePoint Knowledge and Information Portal* (SKIP), which was initially populated with Microsoft SharePoint how-to videos and other existing training materials. This was a starting place for site owners, but the team didn't incorporate enough sustainable site owner or contributor training or best practice information during the project rollout, and some site owners quickly let the intranet team know that they didn't feel knowledgeable enough to maintain their sites.

To address this shortcoming, the team has since been publishing more in-house content on the SKIP site so site owners can find training materials tailored to the ECN environment, rather than to the generic SharePoint installation.

"It has been growing organically," says Debbie Bender, Senior Communications Analyst, "with some of our power users modeling some great site best practices and others following suit, but the adoption process has taken a little longer this way. We are now in the process of creating a more comprehensive adoption plan to improve use of social features and other SharePoint functionality, and to increase site owner training on site management.

"We are building out a training program with more targeted training materials, and are planning on resurrecting the site owner community by scheduling regular meetings and Lunch & Learns that are on target with some of the knowledge opportunities and gaps we've identified along the way."

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Habanero Provides strategy, design, implementation, and support services	• Technical design, including detailed iterative design (SharePoint development) working with stakeholders • Site development • Site framework development based on approved navigational structure • Site and page development for all major business groups • Content development with assistance of business stakeholders
UX Guys A digital experience consulting firm focused on user research and usability consulting	• Review of Encana content audit and other onboarding materials • Stakeholder in-depth interviews ("IDI") • Review IDI results with internal Encana team to discuss findings, concepts, and direction • Conceptual site maps and navigational prototypes that outlined an early approach to navigational design

GOVERNANCE

Web Governance Framework

The Encana intranet's web governance framework establishes an outline for how the company determines and evolves processes, standards, and procedures, and the various related roles needed to manage and maintain the intranet. This framework enables Encana to introduce guiding principles on how such decisions will be processed, who will be included in the decision-making, and how consensus will be reached. It is a work in progress, but it is well underway.

The governance framework helps the organization define and execute on the following aspects of governance:

- **Roles and responsibilities.** The framework captures, reviews, and clarifies the roles, responsibilities, and authorities related to the intranet.
- **Strategic direction.** With the framework in place, the organization can capture, review, and clarify the existing/desired direction, as well as the intranet-related communications, standards, and processes.

- **Shared process gaps.** The framework helps the organization determine which high-level intranet-related processes, capabilities, and technologies are shared, or should be shared, across the organization.
- **Standards gaps.** The framework helps the organization decide which intranet processes, standards, and guidelines need to be created or modified to meet current needs.
- **Communication strategy.** The framework helps identify how all of the above will be endorsed, communicated, and regulated within the organization.

Team members will have to continue to adjust and update the framework to better align with new team structures and the evolving accountabilities, but they do have solid buy-in and adoption of this framework. The team is working toward a future in which all of the following can be easily accomplished:

- Identify the organizational mechanisms through which intranet-related strategies, processes, and standards are set and maintained
- Reduce intranet development risks by establishing clear intranet decision-making authority, extending intranet web accountability to more senior organizational levels, and improve intranet web standards compliance
- Provide a forum where disparate needs and production practices can be discussed, aligned, and resolved
- Minimize and confirm internal website ownership and strategic direction issues, smoothing the relationship between various departmental intranet stakeholders
- Improve the internal web development environment by reducing the opportunity for competing editorial, structural, or technical approaches to intranet web development
- Identify and create intranet web-specific processes and standards that will reduce risk to the organization
- Identify a standardized process for creating specialized teams and working groups to help enable intranet web strategy-related discussions, as well as for researching roles and responsibilities

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Executive Sponsors (ES)	• Serve as executive-level champions for the solution • Position the solution as a critical mechanism for achieving business value • Help communicate the solution's value to the various management levels at Encana
Business Owner (BO)	• Serve as champions for the solution • Position the solution as a critical mechanism for achieving business value • Support internal communications and help communicate the solution's value to the various management levels at Encana
Manager of ECommunications	• Manage the overall design, functionality, and integrity of the intranet web solution from a communications and business perspective • Foster the productive use of web-based intranet services • Help find the direction and priorities for Encana's short- and long-term intranet web strategy
Operations Team/ Ecomm Analyst (OT)	• Develop and maintain the voice, tone, brand, and messaging for Encana's enterprise-wide and enterprise-level intranet web communication • Work closely with the ECN Technical Support Team to maintain site standards and style guides for new development
Communication Advisors (CA)	• Liaise with the business to develop and maintain appropriate, accurate, engaging, and informative content on Encana's digital platforms
Brand Advisors (BA)	• Provide guidance on how to ensure that the intranet adheres to general Encana identity guidelines
Communication Advisors (CA)	• Liaise with the business to develop and maintain appropriate, accurate, engaging, and informative content on Encana's digital

	platforms
Technical Support Team (TST)	• Deliver day-to-day operational support for the base ECN technology infrastructure by continuously maintaining and monitoring it • Deliver aspects of the solution delivery life cycle, including requirements definition, estimating, design, implementation, training, best-practice development, and continuous client support
Site Owners (SO)	• Ensure that content for a particular intranet site is properly collected, reviewed, published, and maintained over time
Application Stewards (AS)	• Maintain technical contact for the target application • Possess general knowledge about the application • Plan for and assess major upgrades of the application and/or related components

Web Innovation Technology Advisory Committee (WITAC)

In addition to the roles listed above, Encana has also built out a committee that helps the overall organization make balanced governance decisions. The Web Innovation Technology Advisory Committee (WITAC) is made up of representatives from the Communications and Technology teams and is charged with finding the right balance between technology and business, and between centralized control and decentralized empowerment (governance). The committee's mandate will be to meet on a regular basis to discuss strategy and interdependencies that will occur between communications and IT. Its role also includes looking for synergies between communications and IT and finding opportunities for technology to support internal communication.

WITAC members will work together to determine communication and training tactics to support Site Owners and Site Stewards; they will also do the following:

- Provide direction to the Site Stewards and Site Owners, and support them in producing and maintaining a quality website
- Establish, communicate, and promote standards and guidelines for tools and procedures related to developing and maintaining intranet pages and applications
- Develop, coordinate, and maintain effective, timely communication channels for intranet-related questions and issues, and provide a clear source of contact for all page owners and authors

- Bring issues and recommendations from business units regarding intranet standards, tools, policies, and procedures to the ECN Business Owner

ECN Intranet Site Definitions

SharePoint was initially introduced to Encana a few years prior to the intranet redesign project to help facilitate collaboration and document sharing with a few select parts of the business. Over the years, smaller internal SharePoint sites were launched, with varying degrees of success and adoption levels. To help differentiate the new enterprise intranet redesign project from these efforts, the team needed a way to define and group the different types of existing SharePoint sites, as well as to triage new incoming site requests. One of the newly created WITAC's first tasks was to list all site types and create definitions. These agreed-upon site definitions allowed for smoother, more efficient governance discussions, as well as for standardized language when the team communicated to the company at large.

Tracking the various site areas has helped instill better communication and focus among team members. Throughout the organizational and team changes, the Encana designers focused on describing the benefits of the different site types and defining the audience and owners for each. Some of these sites are described in the section that follows.

Enterprise Site

An enterprise site is designed to let operational and functional teams communicate to the rest of the organization about enterprise-wide processes, documents, organizational structure, culture, leadership, and business strategy. It also includes company news, announcements, and updates. The content is tightly governed and is mostly static, one-way "push" communication to all staff. Examples include content related to business strategy, *Employee's Corner*, and travel.

Audience	All staff
Owners	Internal Communications
Benefits	Provides staff members with essential and basic public information about the enterprise, its operational and functional areas, its leaders, and its values

Project Site

A project site is a type of collaboration site designed for project teams to help them collaborate and manage their projects more easily and efficiently. This type of site has a defined start and end date, and can be archived at the end of the project life cycle.

Audience	Project team members
Owners	Project manager and project team
Benefits	This site gives project team members and other stakeholders a central point to access project status and up-to-date project information. It provides a medium for the project team to collaborate on tools, templates, and other project resources. Project sites can also have social features similar to a community site, such as a newsfeed.

Team Site

A team site — also a collaboration site — is designed for teams and their members to collaborate and share knowledge about team practices and thereby support day-to-day work. The site is typically defined by the organizational structure (for example, the Communications Team site). Team sites have an undefined end date.

Audience	Operational and functional teams
Owners	Business team leader and business team
Benefits	Fosters team collaboration and knowledge sharing by giving users tools to • Discuss ideas and review documents • Make announcements to team members • Manage the team schedule and calendar • Track issues, tasks, and other team activities Site membership (access) can be controlled and managed by the Site Steward. Team sites can also have social features similar to a community site, such as a newsfeed.

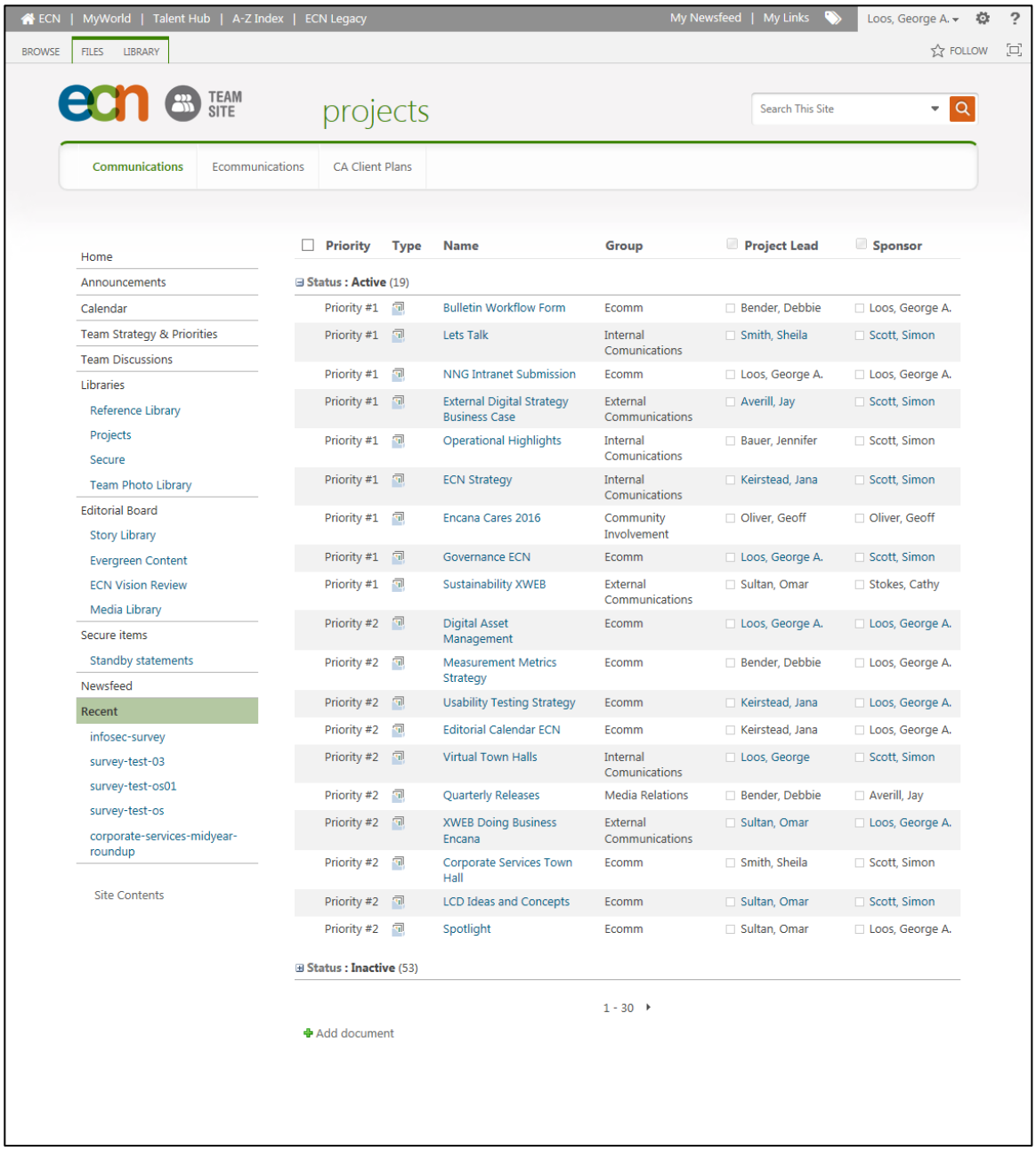


Image 31. Encana Intranet Team Site Project List.
encana_20_team_site_project_list.png

Community Site

Another type of collaboration site is a community/social site, which is designed for sharing and discussing topics of common interest across departments, disciplines, or teams; an example is the Encana Women's Network site. This type of site can have a defined or an undefined end date, depending on the objective and is also referred to as a collaboration site.

Audience	All staff
Owners	Community managers
Benefits	• Promotes a transparent communication and information exchange across teams, business units, and departments by enabling people to share expertise and seek help from others with knowledge in specific areas of interest • Tracks the history of any posts/replies in discussions for easy reference • Allows membership to be private, closed, or opened to everyone

My Site

My Sites provide staff with a central location to manage and store personal documents, favorite links, and contacts.

Audience	Individual staff members
Owners	Internal Communications
Benefits	• Provides a personal space for staff to manage private information, links, and files • Lets the owner control and manage site membership

Personal Blog

A personal blog is designed like a personal webpage where an individual (or a group of individuals) can record their own experiences, opinions, and observations on a regular basis; blogs are often illustrated with images, videos, and links to other sites. A personal blog should reside in the person's My Site, and is also referred to as a collaboration site.

Audience	Individual staff members
Owners	Individual staff members
Benefits	Creates an opportunity for users to express their personal opinions and share their knowledge; subject matter should be limited to corporate issues

Business Blog

An executive blog is designed as a dedicated web page where an individual (or group of individuals) can record (in writing or video format) company-wide announcements, news, and reflections on various corporate subjects on a regular basis. Executive blogs are often illustrated with images, videos, and/or links to other sites. These blog pages are a subsite of the enterprise sites and are also considered a collaboration site.

Audience	All Staff
Owners	Executives
Benefits	• Fosters and promotes honest and transparent communication from Executive Leadership to the rest of the company • Provides employees an opportunity to comment and give feedback on company announcements, and for the Communications team to publicly respond

Application Site

An application site is designed to describe sites with custom workflows and other unique features, such as those for Recognize App and Corporate Records Management Request Forms.

Audience	Application Stewards and all staff
Owners	Application Stewards
Benefits	Provides a go-to place for anything and everything regarding the application for upgrades, support, issue resolution, and so on

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	http://ecn.encana.com
Default Status	ECN is set to be the default browser for all users.
Remote Access	Users can access the site remotely using VPN.
Shared Workstations or Kiosks	Some field workers share a workstation.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2002	Encana is created from two Canadian independent oil and gas companies — PanCanadian Energy Corporation (PanCanadian) and Alberta Energy Company Ltd. (AEC). At this time, a new intranet is built to deliver internal communications to approximately 5,000 employees and contractors across North America.
2002–2014	The intranet is operated under a loose, undefined IA and a distributed content publishing model. A content audit toward the end of this period reveals that more than 12,000 folders and 200,000 web pages are housed on the platform.
2009	Encana announces plans to split the company into two distinct and independent energy companies: a natural gas company (Encana) and an integrated oil company (Cenovus Energy Inc.).
May 2013	The company's intranet portal technology has been unsupported for more than three years, and its vendor is slated to retire the software by June 2014.
June 2013	A project charter is presented to replace the intranet portal technology.
August 2013	**Project scoping:** • Assemble project start team • Perform "as is" analysis • Define high-level vision for the intranet • Define knowledge sharing and best practices • Create requirements and scope definition
August–October 2013	**Audit and definition:** • Document current business processes • Document current site structure • Audit portal categories: widgets and small applications • Audit site pages on the existing intranet

	(site ownership and analytics)
August–October 2013	**Information Architecture:** • Create a functional prototype with high-level wireframes • Create functional user-based specifications • Conduct usability testing
October–February 2014	**Design:** • Build a content classification model (metadata strategy) for top-level navigation • Use a SharePoint architecture (including site collection design etc.) • Develop a search strategy • Create an implementation plan
March–November 2014	**Implementation and launch:** • Create a detailed UI design for each component • Implement designs and conduct quality assurance and testing • Offer training • Migrate content • Stabilize the site • Go live
January–August 2015	Migrate remaining sites
Overall redesign timeframe: 15 months to launch	

CONTENT AND CONTENT CONTRIBUTORS

Content Migration

Team members knew the content migration task would be complex because they were assessing old content from multiple sources and making decisions about what should stay, what needed updating, and what had to be purged. With that in mind, they decided the best approach was to use the redundant, outdated, or trivial (ROT) analysis model to identify obvious content problems. When conducting the ROT analysis, they specifically looked for

- Outdated news, events, or contact information that was represented as current

- Welcome or overview pages that repeated content on lower-level pages
- Information that was no longer relevant or accurate
- Broken or irrelevant links or missing content
- Mislabeled headers and page titles

During the ROT analysis, this type of content was assigned a label, identifying it as needing to be discarded or updated before migration. Performing this exercise during the audit helped the team ensure that they migrated only content that was current, relevant, and valuable to the end users. This process included several steps:

- Site owners were given a spreadsheet the listed all of their web site assets (pages, documents, images, and links to other assets) along with last-modified dates.
- Site owners were responsible for filling out the spreadsheet, examining each item to determine the audience (enterprise-wide or collaboration) and whether the content should be archived, kept as is, or updated. The site migration would not progress until this step was complete.
- Site owners received Google Analytic reports that showed how often their content was used. This gave them insight into what they valued compared to what site visitors were actually looking for.
- When the content migration was complete, the legacy site was archived and backed up on an external drive. This allowed relatively easy access to archived content as needed.

Although doing the initial audit to log all web assets for site owners was labor intensive, it let the team reduce outdated content by 65%. Having completed the process, the team recommends this step to avoid migrating stale content to a new intranet.

Metadata

Another great improvement the team made when porting content to the new site was regarding metadata. During the site analysis and UX review, the team discovered much of the old portal's content was stored and classified using deeply rooted folder structures that were incompatible with search functionality. As a result, users found it difficult to narrow search results and find information. To address this shortcoming, team members moved from a folder-based structure to a metadata-based structure so they could organize and classify content in a way that let users more easily group, sort, and filter content to find what they need. Doing this required the team to identify the intranet's primary content types, along with its key metadata (attributes).

For example, for company bulletins and announcements, team members identified key attributes such as title, year, region, date, category, and keywords. By capturing metadata on the content rather than putting content in folders, they were able to provide users with more context around the content. This let them improve search results and refiners to more effectively filter results and improve their content quality.

Another clear advantage of metadata is that it gives users and the content management team more control over the content. Users can now control how they view content in a way that is completely separate from how the content is stored; that is, they can view content from multiple angles and consume it in a personalized way. The content management team can also more effectively monitor content throughout its life cycle, from creation to disposition. This was a huge win for Encana because none of this was possible within the previous portal's folder structure.

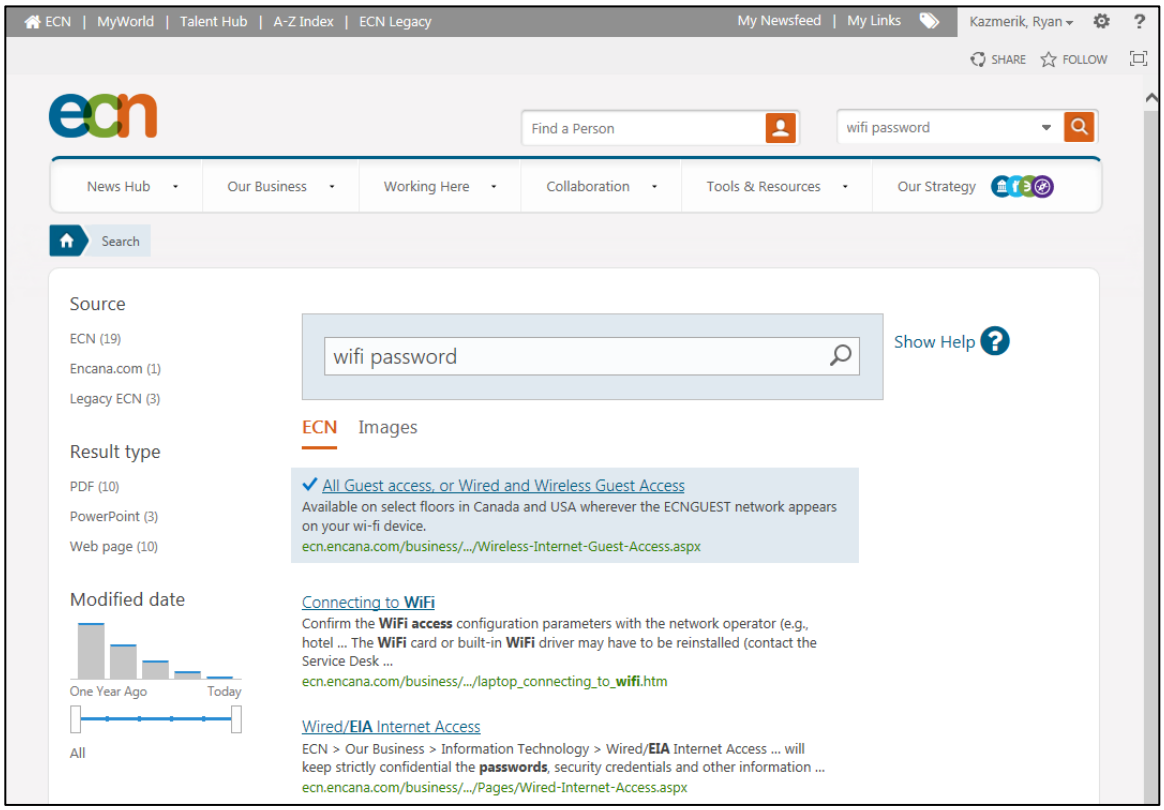


Image 32. Encana Intranet Example Search Results Page.
encana_21_search_results.png

Managing Content

The Encana team follows two different governance structures to manage content on ECN, depending on the site type. That is, ECN enterprise content follows a much more rigid management process than the more unstructured collaboration content. Although the team has made many adjustments to its approach along the way, it has made very few changes to the way it originally designed content governance and approval workflows.

ECN Collaboration Site Contributors:

- An ECN collaboration site can be requested and managed by anyone in the company, assuming the site is authorized by a site sponsor, who is typically some type of a team manager. Collaboration sites are predominantly unmonitored and ungoverned, so the responsibility of managing and maintaining site content falls to the site owner.
- Once a site has been created and a site owner has been assigned, the intranet team ensures that the site owner is given some type of site management training when the site is handed off.
- After hand-off, site owners and any delegates they assign are solely responsible for managing and governing the site — including ensuring that the content is current, accurate, accessible, and organized. If owners have questions about managing their site, they can access the SKIP to learn how to use SharePoint or contact the SharePoint technical support team for help.
- If the SharePoint support team gets questions about a site and can't find the owner, the intranet team will reach out to the team's manager to request that a new site owner be assigned.

Early on, the team established a Site Owner Community so that people across the company who were responsible for collaboration sites could interact, share information and ideas, and learn from each other. There are currently 60 members of that community. However, given changes in company roles and corporate downsizing, that community is currently lacking a leader, which has led to a significant decline in participation. The intranet team is looking to resurrect the Site Owner Community as part of its ongoing adoption planning efforts; it also hopes to build more tools and resources to help support site owners so they can contribute great content to their sites.

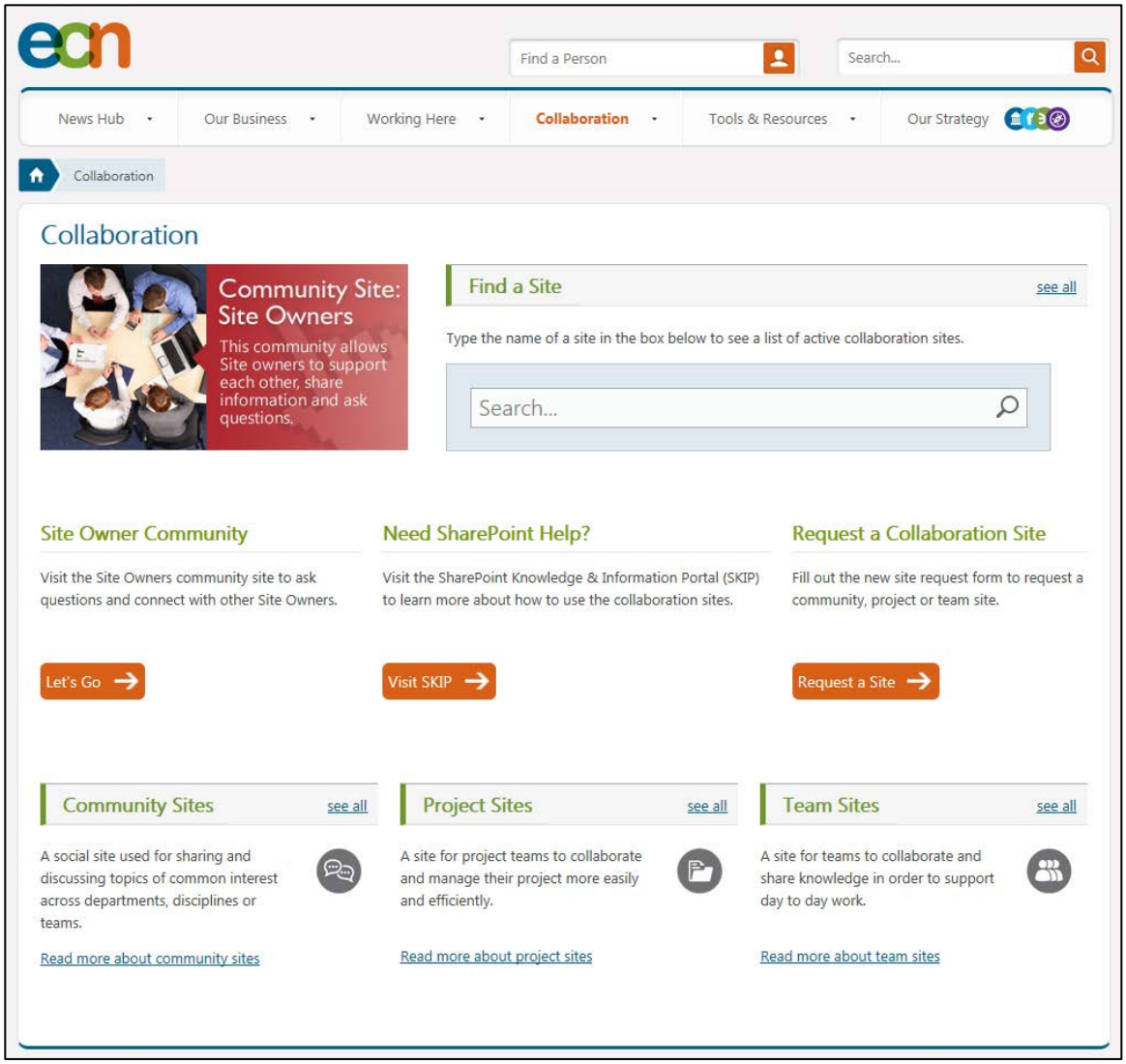


Image 33. Encana Intranet Learning Portal. The Sharing Knowledge and Information Portal (SKIP) learning portal was established on the new intranet to assist users in transitioning to the new site.
encana_22_ecn_collaboration_site.png

ECN Enterprise Site Contributors:

- All ECN enterprise sites currently require review and approval from the ECommunications team before content can be published. During the redesign's migration phase, content contributors were selected from the teams responsible for providing the enterprise sites' content.

- All sites require a single contact person to act as the liaison between the ECommunications group building the sites and the actual content owners. When teams don't have a resource available to maintain the content, the ECommunications team takes over responsibility of content contribution until a suitable resource can be allocated to resume that work.

Because the intranet project has spanned a major organizational downsizing, the team has begun to reconsider the content governance and publishing model for enterprise content. Fewer Communications resources are now available to support business groups with their sites, so the team is moving toward a more distributed publishing model where certain key business groups are responsible for updating and approving their own corporate content. The ECommunications team is currently monitoring this evolution closely to decide whether it is a model it would like to embrace as an overall longer-term intranet strategy.

Training

The team built the SKIP early on, initially populating it with Microsoft SharePoint how-to videos and other existing training material. This served as a starting place for site owners in need of training. As experience and training needs have evolved, team members continue to populate the SKIP portal with new supporting information, but they are building a training program with more targeted training materials as well. They are also planning to resurrect the Site Owner Community by scheduling regular meetings and Lunch & Learns that target some of the knowledge opportunities and gaps that have been identified along the way.

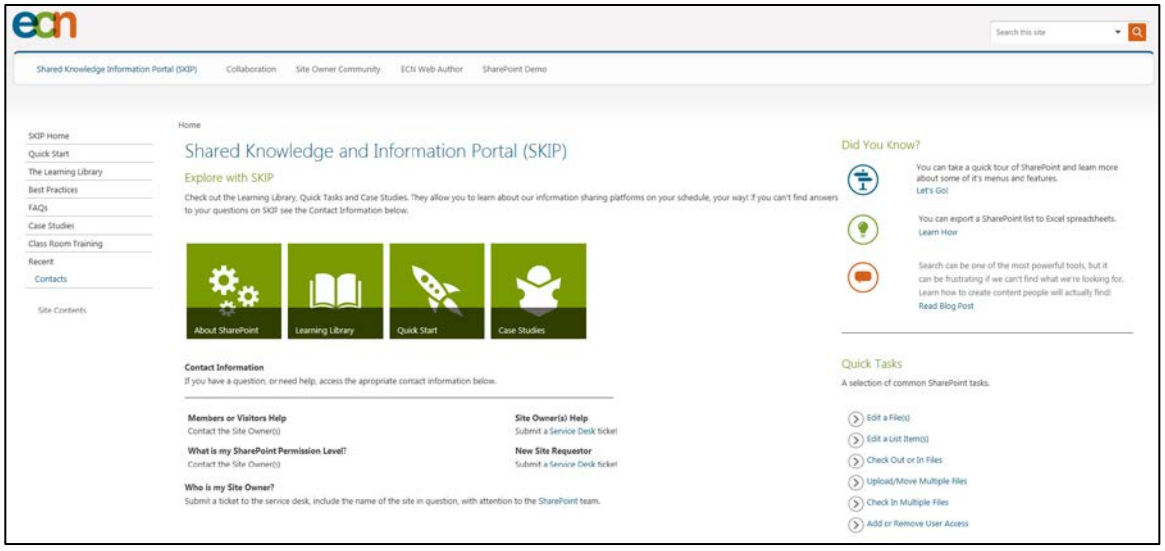


Image 34. Encana Intranet Learning Portal. The SharePoint Knowledge and Information Portal (SKIP) is a starting point for intranet training needs. *encana_23_ecn_skip_site.png*

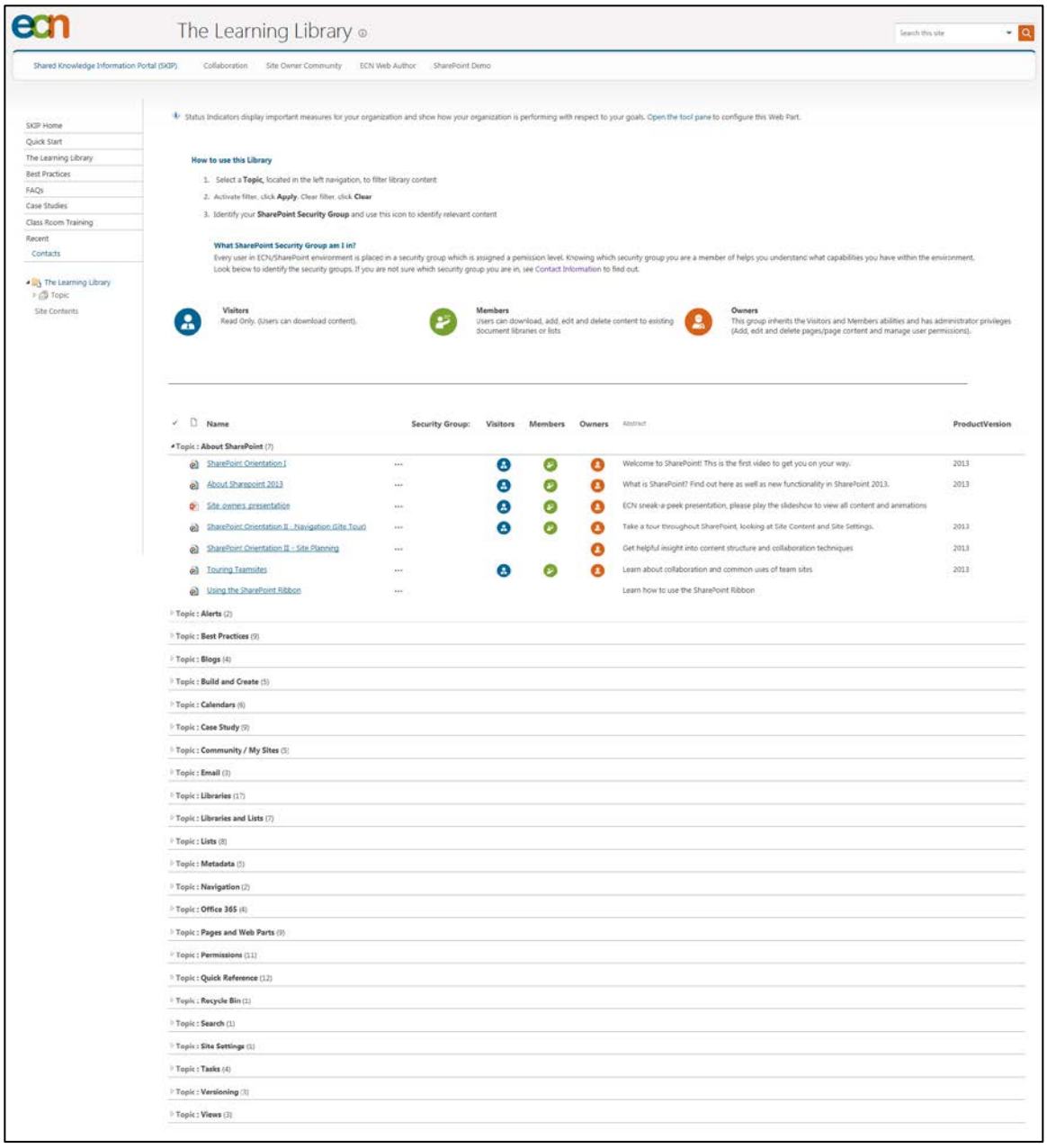


Image 35. Encana Intranet Learning Library. The new intranet's Sharing Knowledge and Information Portal (SKIP) Learning Library offers training for users. *encana_24_ecn_skip_learning_library.png*

Maintaining Quality

When team members completed content migration, they scrutinized all of the content that was being added to the new portal. However, they haven't yet established a heavily governed content management process that monitors the accuracy or relevance of content over time. For enterprise sites, the department or

team managers are responsible for regularly reviewing their sites to update or delete content. For collaboration sites, the technical team runs regular reports on site activity. Any sites that haven't been accessed in three months are flagged for archiving, the site owner is contacted, and the archival process is initiated.

"While we still want site owners to be responsible for managing their sites, we want to make the management process better," says Loos. "So we are aiming to incorporate training content into the new training program that provides site owners with more support and resources to more successfully manage their sites."

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• SharePoint Server 2013 • SharePoint Servers: Windows 2008 R2 SP1 VMs (VMWare) Intel Xeon • SQL Servers: Windows 2012 R2 Standard Physical Intel Xeon
Bug Tracking/Quality Assurance	• SharePoint List (for bug tracking) • WebLoad (for performance and load testing)
Design Tools	• Visio • XMind • Optimal Workshop
Site Building Tools	• ShareGate
Content Management Tools	• Excel (for content analysis)
Search	• SharePoint Server 2013

Technology Evaluation

SharePoint 2013 was chosen as the platform for ECN primarily because Encana was already in the process of implementing SharePoint as a company-wide document management system. The decision to use SharePoint for the new intranet was not just economical, but also tactical. Early designs of ECN's content publishing flow suggested that business groups throughout the company would publish content in their own isolated sites, which could then be rolled up into the ECN portal, which would easily be supported if SharePoint was the underlying platform. In addition, several members from the technical team possessed deep SharePoint development and design skills, which enabled the team to pursue customizations to authoring, search, mobility, and other portal facets.

Some customizations were made to SharePoint to accommodate Encana's specific needs for the new intranet, including the following:

Branding, Front-end Templates, and Page Layouts

- **Branding.** The ECN portal's design introduced users to a new SharePoint look and feel that is now required in all areas of SharePoint, including existing collaboration sites. This contributes to a unified ECN brand experience.

  The brand and templates for the collaboration sites had more flexibility and fewer rules for how they could be used. The templates were left fluid, so people could determine how they wanted to use screen real estate for their project, team, and community sites. The team also created wordmarks (next to the ECN logo) and color cues for each site type to help differentiate collaboration sites and give staff members visual cues as to where they have landed.

- **Master page.** Master pages define the common layout and interface for SharePoint pages. The master page displays the persistent elements that one might expect to see when navigating from page to page on a site. These elements, which are stored in a master page, might include a company logo, title, navigation menu, search box, and the colors or graphics associated with the business or organization.

- **Page layouts.** Page layouts are used to create customized layouts for web pages. ECN uses a variety of page layouts, providing flexibility to accommodate different communication systems. Following is an example.

  - **ECN-ArticlePageLayout:** This layout has predefined HTML columns and styles, as well as programmed text fields to add content-specific parts of the webpage.

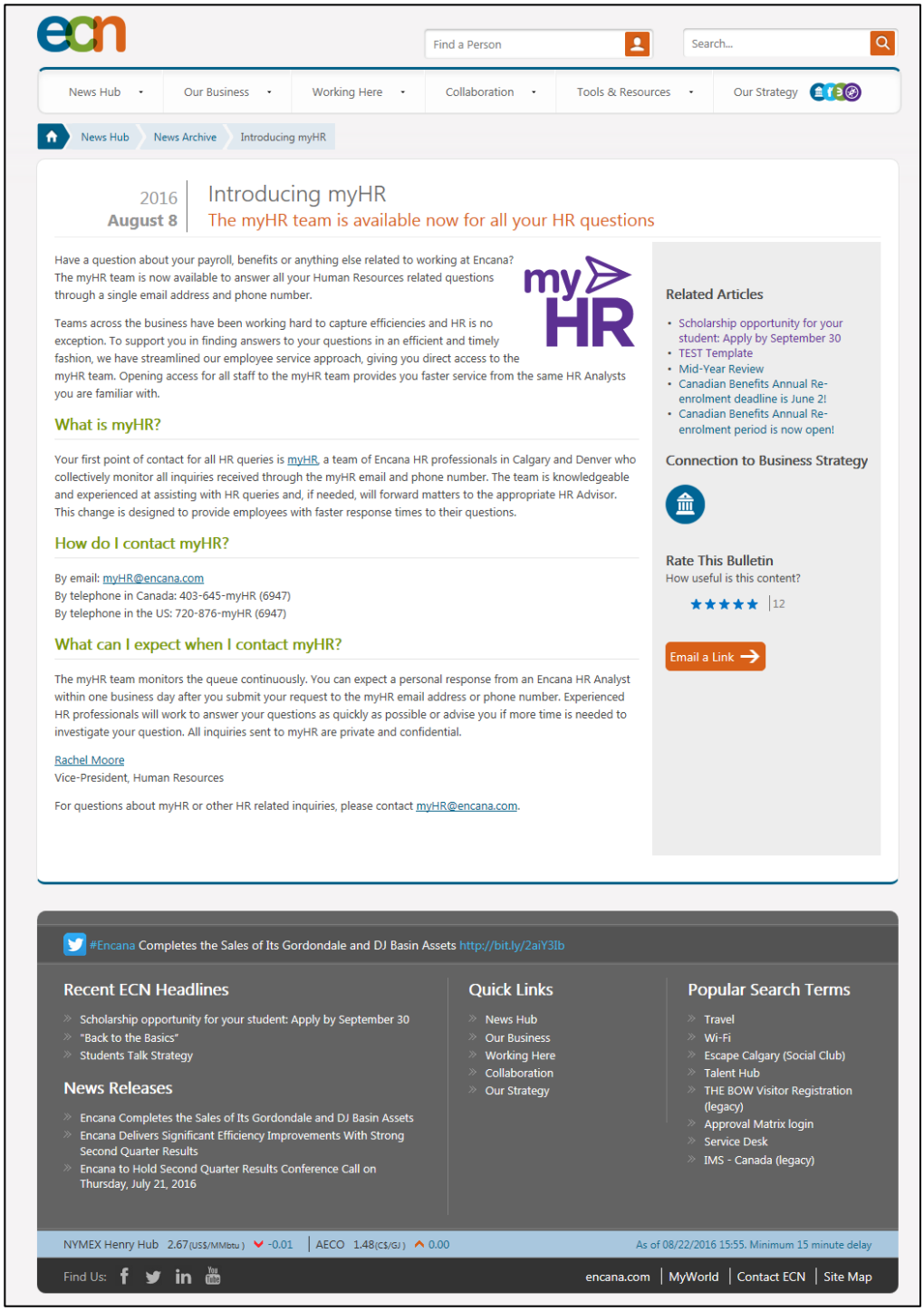


Image 36. Encana Intranet Article Layout Template.
encana_25_ECN_article_layout.png

ROI

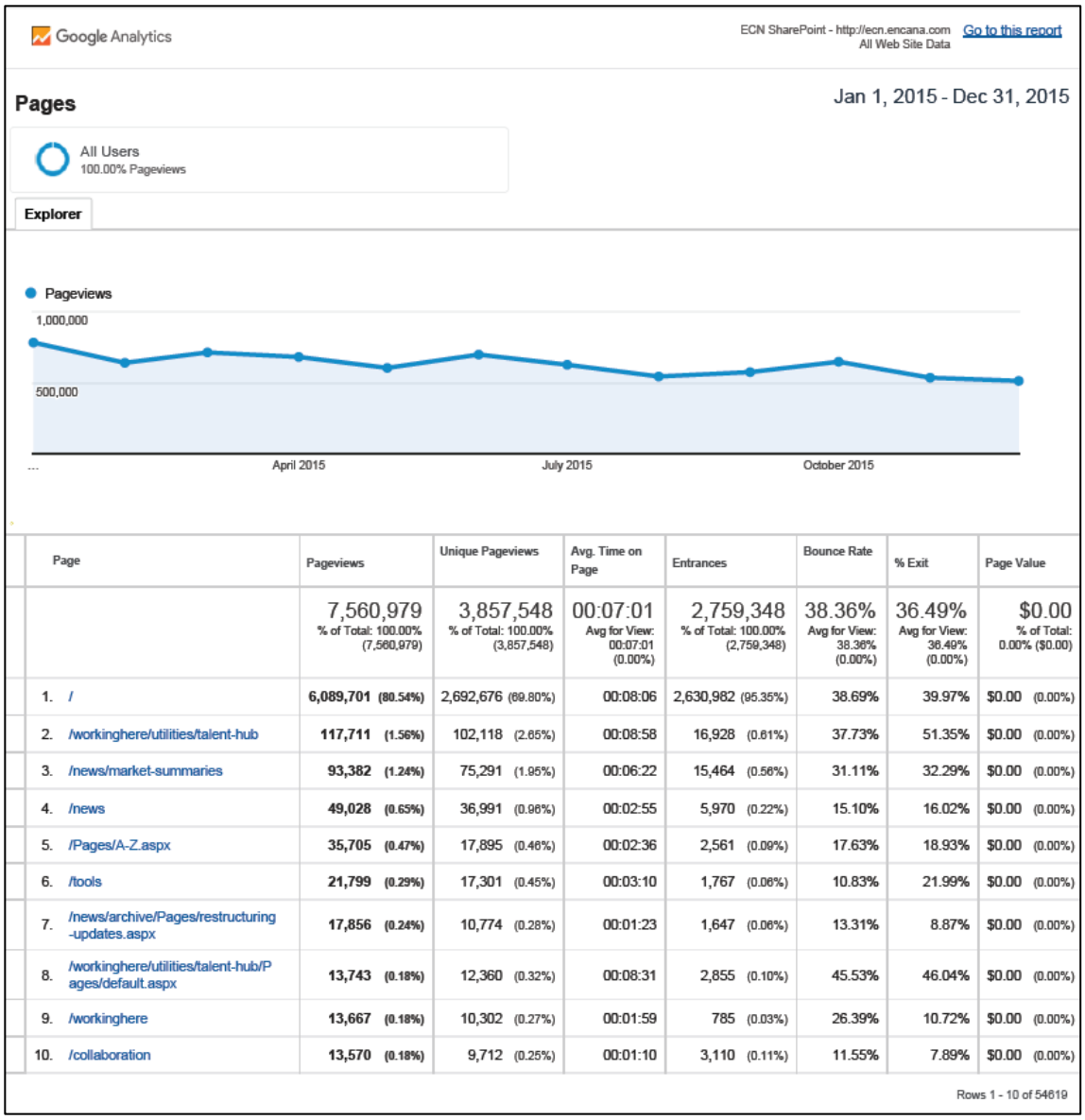
Measuring Success

Project success was measured in several ways that can't be assigned numbers, but are just as important as any metric.

- **Mitigated technical risk.** Although not measured in dollars, the risk of having the old intranet living on an unsupported environment was one the company was no longer willing to take. Instead, the legacy servers were upgraded to house the new ECN portal, the old environment was retired, and all applications that relied on that environment were moved, rebuilt, or archived.
- **Improved content quality and accessibility.** With data showing that approximately 20% of a staff member's day is spent looking for information, the Encana team invested in considerable planning to ensure that the new intranet's IA and search engine would provide a better UX. By cleaning up outdated content, the team removed the clutter and duplication; because of this, user feedback has been extremely positive overall. The team continues to work to continually improve the site based on analytics, search results, and user feedback.
- **Substantially more visitors, despite fewer staff members.**

The new intranet has also demonstrated its worth by providing the following benefits:

- New collaboration tools facilitate knowledge sharing and staff engagement across the organization
- An improved UX with a new navigational structure and cleanup of outdated content
- Integrated document management functionality
- Ability to create and customize ECN pages, including adding, modifying, and maintaining content
- A unified intranet that brings enterprise, team, project, and community sites under one umbrella and thus gives staff one source of truth for company information
- A stable, supported, and compatible technical environment that reduces the risk of a major and lengthy crash of the staff's news source



	Page	Pageviews	Unique Pageviews	Avg. Time on Page	Entrances	Bounce Rate	% Exit	Page Value
		7,560,979 % of Total: 100.00% (7,560,979)	3,857,548 % of Total: 100.00% (3,857,548)	00:07:01 Avg for View: 00:07:01 (0.00%)	2,759,348 % of Total: 100.00% (2,759,348)	38.36% Avg for View: 38.36% (0.00%)	36.49% Avg for View: 36.49% (0.00%)	$0.00 % of Total: 0.00% ($0.00)
1.	/	6,089,701 (80.54%)	2,692,676 (69.80%)	00:08:06	2,630,982 (95.35%)	38.69%	39.97%	$0.00 (0.00%)
2.	/workinghere/utilities/talent-hub	117,711 (1.56%)	102,118 (2.65%)	00:08:58	16,928 (0.61%)	37.73%	51.35%	$0.00 (0.00%)
3.	/news/market-summaries	93,382 (1.24%)	75,291 (1.95%)	00:06:22	15,464 (0.56%)	31.11%	32.29%	$0.00 (0.00%)
4.	/news	49,028 (0.65%)	36,991 (0.96%)	00:02:55	5,970 (0.22%)	15.10%	16.02%	$0.00 (0.00%)
5.	/Pages/A-Z.aspx	35,705 (0.47%)	17,895 (0.46%)	00:02:36	2,561 (0.09%)	17.63%	18.93%	$0.00 (0.00%)
6.	/tools	21,799 (0.29%)	17,301 (0.45%)	00:03:10	1,767 (0.06%)	10.83%	21.99%	$0.00 (0.00%)
7.	/news/archive/Pages/restructuring-updates.aspx	17,856 (0.24%)	10,774 (0.28%)	00:01:23	1,647 (0.06%)	13.31%	8.87%	$0.00 (0.00%)
8.	/workinghere/utilities/talent-hub/Pages/default.aspx	13,743 (0.18%)	12,360 (0.32%)	00:08:31	2,855 (0.10%)	45.53%	46.04%	$0.00 (0.00%)
9.	/workinghere	13,667 (0.18%)	10,302 (0.27%)	00:01:59	785 (0.03%)	26.39%	10.72%	$0.00 (0.00%)
10.	/collaboration	13,570 (0.18%)	9,712 (0.25%)	00:01:10	3,110 (0.11%)	11.55%	7.89%	$0.00 (0.00%)

Rows 1 - 10 of 54619

Image 37. Encana Intranet Google Analytics. 2015 Google Analytics report for the Encana intranet. *encana_26_google_analytics_2015.png*

Success Factors

The following factors were identified as contributing to the project's success:

- Working with key stakeholders to negotiate and simplify requirements
- Employing strategy to align business requirements with the project objectives
- Adopting an Agile methodology to plan and implement the large project

- Maintaining flexibility within the team to change both ideas and future business processes
- Testing usability, functionality, and performance were big contributors to successful intranet deployment
- Deploying the intranet with out-of-the-box SharePoint features with little to no customization is foundational for planning for the portal's future growth and upgrades
- Creating different streams with smaller working groups within the project team made it easier to break down the project deliverables

LESSONS LEARNED

George Loos, Manager of ECommunications, describes some of the most pertinent lessons learned from the redesign project:

- **Dedicate a resource to manage training.** "A dedicated training role/coordinator would have been helpful in providing adequate training to the end users."
- **Don't make change management an afterthought.** "Change management was introduced very late in the project. By introducing change management earlier in the project, we would have been more proactive in addressing the people side of change and end user concerns that would have reduced some of the challenges we've had around adoption."
- **Active stakeholder engagement is key.** "Need to have more active stakeholder engagement, especially in the area of content migration."
- **Track content migration closely.** "As the project progressed, we learned that we needed to be more efficient in our approach to migrating content to the new environment. On the surface, we thought that dividing the work among many people right from the beginning would get this task finished more efficiently. In the end, it led to inconsistent site deployment approaches and actually created a tremendous amount of unexpected cleanup work. We had to regroup and create a site deployment checklist to assist with the deployment of sites from one environment to another. The checklist included all the steps required to deploy a site from the inception phase to the final launch. Having this checklist allowed us to get back on track by increasing efficiency, promoting consistency, saving time, and reducing mistakes."

The team also identified two best practices that other teams can learn from:

- **Identify the key decision makers** within the project and keep a decision record of all of the decisions that are made.
- **Keep requirements simple**, measureable, and attainable.

Goldcorp, Inc.

OVERVIEW

COMPANY

Goldcorp is a leading gold producer focused on responsible mining practices with safe, low-cost production throughout the Americas.

Headquarters: Vancouver, British Columbia, Canada

Company locations: Goldcorp has offices in Vancouver, Toronto, Mexico City, Guatemala City, Barbados, and Buenos Aires. The company operates four mines in Canada, two in Mexico, and two in Central and South America.

Locations where people use the intranet: The intranet is used at corporate offices and mine sites around the world.

Annual revenue: $4,37 million in 2015 (USD)

THE INTRANET

Users: Approximately 5,000 users in offices around the globe. Users come from every functional area and department. Not all employees and contractors have access to the intranet, as most of the workforce is in the field and has no network access.

Mobile approach: Responsive web design

Technology platform: SharePoint 2013

TEAM

Design team members:

Goldcorp

Executive sponsors: Charlene Ripley, EVP and General Counsel; Luis Canepari, VP of Information Technology; Christine Marks, Director of Corporate Communications

Intranet team (project): Jose Szücs, Project Manager; Damon Sas, Business Owner, IT; Kathryn Gendall, Business Owner, Communications; Mumtaz Chaudhary, Change Management Lead

Intranet team (ongoing): Paula Grimsmo, Conveyor Manager; Jaime Chica, Business Analyst and Workflow Specialist; Mischa Krawzow, Senior Systems Analyst; Luciano Campana, Support Analyst and Mexico City Team Lead; Enrique Gamboa, Support Analyst; Kathryn Gendall, Manager, Internal Communications; Damon Sas, Director, Enterprise Technology Services

Habanero Consulting Group

Design, development, and support: Chris Radcliffe, Project and Strategy Advisor; Melanie Gabanna, Lead Intranet Consultant and Change Management Support; Toni Albert, Project Manager; Benedict Ng, Lead Interaction Designer; Bradley Smith, Interaction Designer; Cameron Sielski, Business Analyst; Christopher Parsons, Front-End Developer; Dan Beck, Workflow Developer; Daniel Rotenberg, Technical Analyst; David Evanochko, Front-End Developer; David Webb, SharePoint Developer; Elena Rosu, SharePoint Developer; Jan Groenendijk, Lead Workflow Architect; Lara Beaton, Quality Assurance Specialist; Larry Lau, Solution Architect; Mischa Krawzow, Technical Analyst; Oleg Bystrov, Infrastructure Architect; Sal Belal, SharePoint Developer; Stephen Brown, Quality Assurance Specialist; Thomas Laehren, Quality Assurance Specialist; Michael Champion, Project Coordinator; Lori Sokoluk, Project Manager

INTRANET TEAM



Goldcorp team members shown here (in person, left to right): Jaime Chica, Jose Szucs, Kathryn Gendall, Damon Sas, and Paula Grimsmo; (on screen, left to right): Mumtaz Chaudhary, Enrique Gamboa, Luciano Campana, and Mischa Krawzow.



Habanero team members shown here (in person, left to right): Sal Belal, Jan Groenendijk, Melanie Gabanna, Cameron Sielski, Stephen Brown, David Webb, Elena Rosu, Lara Beaton, and Larry Lau; (on screen, left to right): Oleg Bystrov, Chris Radcliffe, Dan Beck, Christopher Parsons, Daniel Rotenberg, Bradley Smith, and Toni Albert.

HIGHLIGHTS ABOUT THIS WINNER

With a focus on responsible mining practices and improving collaboration across departments, the intranet team set out to create a new design to replace the collection of 13 corporate portals, each of which was dedicated to a specific mine site. This new company intranet, Conveyor, succeeded in unifying employees with its detailed information about safety and sustainability; it also successfully consolidated information from multiple sources, making it easy to find and digest. The site supports Goldcorp's 5,000 information employees working above and below ground, in offices and mines alike, throughout Canada and Latin America (LATAM). The site offers helpful applications, thorough news and communication, and polished color tones that gild it in more ways than one.

- **My Goldcorp, a digital workplace hub.** Employees can access tools on the intranet, including tools that are not part of Conveyor or SharePoint. The intranet thus lets employees navigate to all of Goldcorp's available resources.

- **Multi-language.** To best support employees around the world, Conveyor is available in all three languages spoken at the organization: English, French, and Spanish. Users can change the language for the global content, so users working in an English-speaking location can switch to Spanish, for example.
- **Applications, consolidated in one place.** Several workflows were mapped and analyzed, and sometimes linked with other tools. The workflows include smart features, such as the ability to start the work offline and continue it later online. For example, an application for employees who work in a mine can work underground, without an internet connection, then sync content with the intranet once the workers resurface. These applications are consolidated in one area that can be sorted, filtered, and searched, making it easy to find the right application.
- **Simple navigation and page flow.** Conveyor consolidates content into five hubs: *News*, *Safety*, *Sustainability*, *Policies and Procedures*, *My Goldcorp*, and *Departments and Teams*. Menus are clearly labeled and visible, positioned across the top and down the left on desktops (and collapsed on mobile). Pages are laid out in sections, making them easy to scan.
- **Consistent color palette.** A site with consistent page design is more pleasurable for users to navigate. Conveyor uses a simple, consistent color palette throughout, with appropriate gilded touches.
- **Responsive design.** Given the importance of mobile use to many Goldcorp employees, designers took great care to make each page appropriate for and easy to use on desktop, mobile, and tablet devices. The intranet is fully responsive, but designers didn't sacrifice the space used on the desktop so that its design would work for mobile; instead, they made many UI changes to accommodate the different devices.
- **Global and local news.** A wide variety of news — global and local — engages, informs, and entertains employees. Search, topics, and filters help people narrow down the articles to those they are most interested in.
- **Safety.** With safety being of utmost importance at Goldcorp, the intranet team devoted a whole site section to it. The *Safety* section includes key contacts, news, videos, and more, giving employees many options to stay informed about this important topic.

BACKGROUND

Goldcorp wanted to upgrade Conveyor to a newer version of SharePoint and revamp its intranet to meet the following goals:

- **Target communications across geographies.** Many big organizations share common internal communication and collaboration struggles because their employees are spread across large geographic distances. That spread often makes it difficult for employees to feel engaged and connected, as communication can often feel unrelated to their local needs — if it reaches them at all.

  Goldcorp experienced this with its previous intranet. That version of Conveyor was made up of 13 separate portals; this created a great experience at the mine level, but made overarching corporate communications difficult. Key corporate messages from the Goldcorp leadership were not always displayed consistently across the 13 portals. The design team thus had a big opportunity to create an intranet that would provide the same baseline of communications content across Canada and LATAM, as well as give users the ability to target content based on role or geography.

- **Create a unified collaboration experience.** Goldcorp wanted the revamped Conveyor to encourage faster, simpler, and more effective collaboration. It also wanted to decrease the number of team and collaboration sites across the intranet and simplify the 13-portal structure under one global navigation scheme. The goal was to create a single, meaningful experience for all employees. Thus, collaboration capabilities had to support each language group within Goldcorp, especially for the team site directory, intranet content, and the global navigation.

- **Provide a mobile experience to engage employees on the go.** Arguably the biggest incentive for Goldcorp to redesign Conveyor was the fact that the new platform would let the organization create a modern, responsive mobile experience. The existing intranet was available to users through the web browser on their mobile devices, but it was not responsive and was almost impossible to navigate on a mobile device.

  Because Goldcorp operates across the Americas, many users are often travelling or otherwise away from their desks. A responsive portal creates communication efficiencies and reduces the need for people to check the intranet only while in the office.

- **Build a new digital workplace in SharePoint 2013.** Like many organizations, Goldcorp had invested in SharePoint many years ago and, over time, a collection of intranets evolved — in Goldcorp's case, one for each of its (at that time) 13 mines. While each intranet shared a common look and feel, each had a unique navigation structure and collaboration approach. This made it difficult for employees to know how to find information across intranets, and it greatly eroded the intranet as an enterprise-wide communication channel. In effect, the intranet offered no single location where Communications could publish news and have confidence that it would surface on each employee's radar. The old intranet also suffered from duplication of information; the same documents — especially policies and procedures — were often stored in various locations and on various portals.

  With the new intranet, Goldcorp hoped for a digital workplace hub that would bring together the disparate systems employees access each day, including SAP, SuccessFactors, Concur, and IT help request. Further, the company's shift to Microsoft Exchange Online for email provided an opportunity to integrate email and calendars with some elements of the portal, providing a more cohesive experience between two integral communications tools. This focus would also address shortcomings in user adoption. The previous solution had several power users across the company, but the average user was not taking full advantage of Conveyor's capabilities. Giving employees a simple "one stop shop" for all the documents, sites, and applications they use regularly will go a long way toward driving long-term adoption and will increase the intranet's value.
- **Standardize and manage permissions across the intranet.** Goldcorp wanted to move permissions for documents and collaboration sites out of IT and into the business units responsible for creating and managing that content. As it was, IT was granting and managing permissions to content it did not own; moving that content to the responsible business units would improve how Goldcorp managed information and, in particular, how it managed access to sensitive information. Goldcorp also wanted to set permissions in a way that let users see which team sites existed, regardless of whether they had read or edit permissions. This would promote information awareness in the organization, manage risk, and reduce the duplication of sites and content.
- **Improve governance.** With the previous intranet, the accountability and governance approach did not enable proactive, business-led enhancements and overall strategic direction. With the new design, Goldcorp wanted to maximize the intranet investment with a governance strategy and team structure that would improve every intranet-related aspect of the organization.

- **Manage enhancements and growth with user feedback.** Prior to this upgrade, it was not clear how requests for additional functionality were surfaced and managed. In the new solution, Goldcorp hoped to create a mechanism to facilitate the generation of new ideas for Conveyor and have a cross-functional governance team address, approve, and communicate intranet changes based on user feedback. This structure would demonstrate that the portal is valuable for any role and that employees can help shape the intranet's direction.
- **Improve key areas.** The intranet upgrade was aimed at several key areas in the portal and in Goldcorp in general, including
    - Internal brand consistency
    - Analytics and measurement for the intranet (the previous solution had no built-in analytics)
    - Awareness of internal communications and intranet content
    - An upgrade of the current video solution within the SharePoint portal (the previous solution was built in 2008 and did not offer high-resolution, downloadable content)

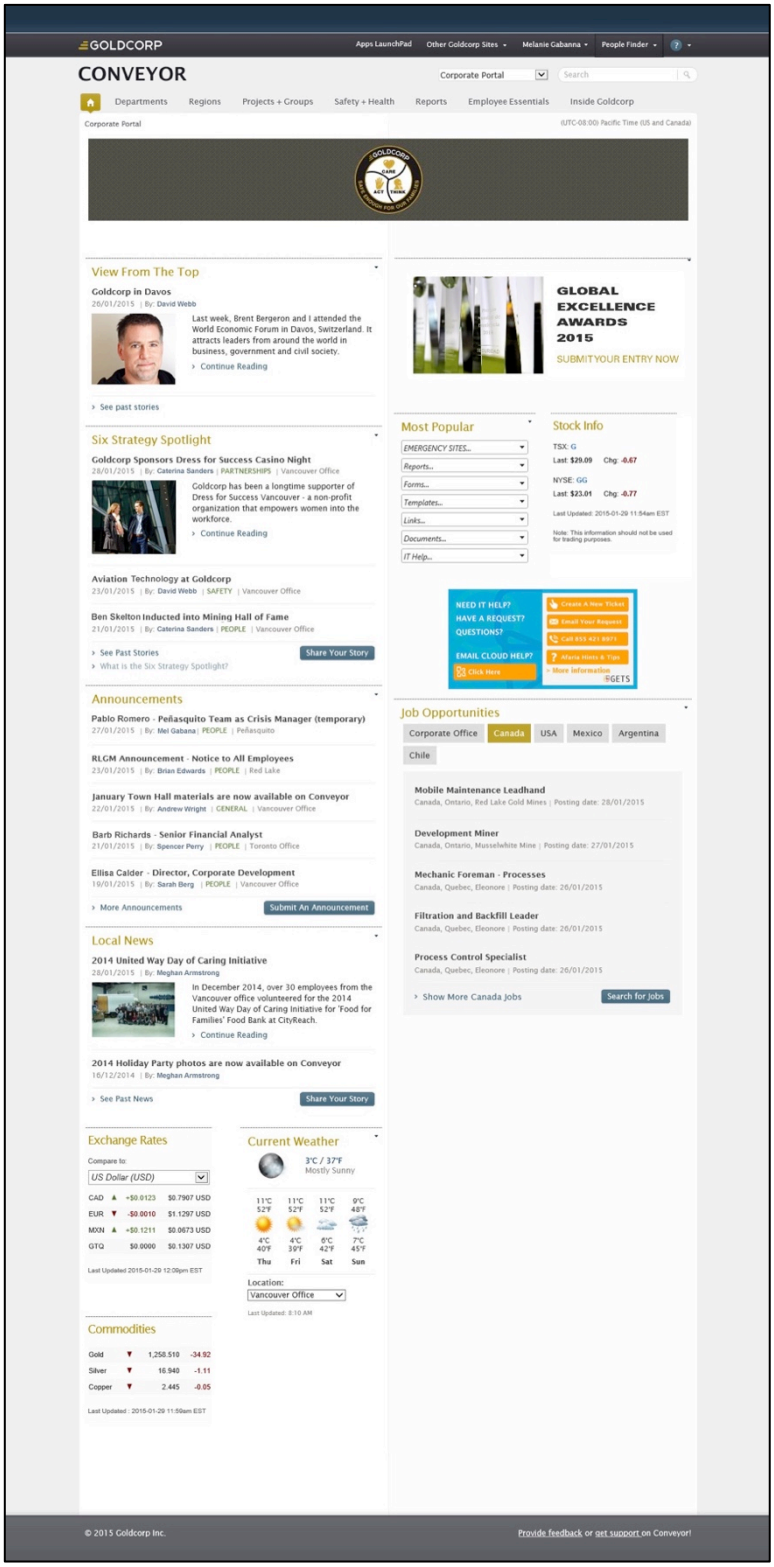


Image 38. Goldcorp Intranet Old Homepage. The previous version of the intranet had no targeted content, and each mine had its own portal instead of being a part of a global intranet. *Goldcorp_01_previous conveyor_before.png*

Challenges

The team faced many challenges in building the new intranet, including the following:

- **Changing the perception of Conveyor.** Conveyor had grown quickly, with no single owner or governance structure. As a result, it was infamous for being slow, difficult to navigate, and impossible to search. One of the project's biggest challenges was to get support and buy-in from across the organization for the idea that revamping Conveyor would add value to the business rather than simply make a dysfunctional system look better. Sharing the prototype early proved useful in convincing many of the skeptics; however, it also created another challenge: as the enthusiasm grew, so did the project's scope.
- **Low adoption in the LATAM region.** Conveyor had been well adopted and utilized in Canada, but among the company's LATAM employees, adoption and utilization were extremely low. The project team spent a lot of time working with leads in this region to promote Conveyor and offer training and workshops in Spanish. The day-to-day operations team is now based in both Vancouver and LATAM and includes team members who are fluent in Spanish. This has made a massive difference to Conveyor's adoption and utilization in LATAM.
- **Managing scope.** With 13 portals and 5,000 users, there was no way to make all the changes users wanted. In the discovery and design phase, representatives from across the business were interviewed, and each had his or her own set of requirements. Creating a solution that addressed the majority of the requirements in a way that ensured on-time and on-budget delivery meant postponing, removing, or re-engineering some requested features to fit the project's scope. As a result, the project team had to consistently communicate and manage business expectations.
- **Training.** During the previous upgrade of SharePoint 2008 to SharePoint 2010, training had been offered post go-live and consisted of weeklong training sessions. These sessions had been poorly attended and were too complex for average users. As a result, during this project's research and design phase, training emerged as a common need. The team's goal was to train as many users as possible on the system before the go-live date and to create shorter, simpler training modules targeted at specific user types. The challenge with this approach was in designing and rolling out the training to users before go-live while still developing the solution. Thus, while many users did receive training prior to go-live, many others did not. Fortunately, because the new site was designed to be more intuitive, many users did not feel the impact of no training prior to go-live and were able to quickly and easily start using Conveyor in its new format.

- **Strengthening Goldcorp's digital workplace.** Another key challenge was creating an intranet that would build a cohesive, integrated digital workplace across the organization. The previous system of 13 separate portals created strong communities at each mine location, but bringing everything — and everyone — together under one intranet would require even more attention toward creating a solution that was meaningful for all employees.

  The goal from the beginning was clear: Unify the global experience and maintain the local focus so the communication and collaboration experience would remain intuitive and relevant. To achieve this, the team improved both the employee experience and the organization's overall digital workplace. This provided a clear structure for decision-making and also set the stage for governance planning as the project matured.

  Paving the way to make this happen meant addressing some tactical considerations, including content targeting, prioritization, multi-lingual content, permissions management, and how to create a UX that would work across different devices. These were resolved within the context of a larger organizational change initiative to reorient Conveyor around Goldcorp's operations, culture, and future.

- **Cross-platform integration.** As mentioned earlier, it was critical that the intranet and its UX be as seamless an experience as possible, across applications and devices. This would go a long way toward achieving the value and adoption necessary to justify the upgrade.

  To accomplish this cross-platform integration, the project team consulted various representatives to understand how to integrate or align their project or solution with the new digital workplace. In many cases, integration into current applications and new solutions occurred seamlessly thanks to the early collaboration and involvement between capable project leads and a design that was born for the My Goldcorp digital workplace dashboard.

- **Content migration.** Given that the intranet project was completed in the context of an upgrade, a considerable amount of content had to be migrated from SharePoint 2010 to SharePoint 2013. Many project challenges related to ensuring both that teams properly audited their content and that content being migrated would show up properly in the new solution. Given the constraints of SharePoint 2007 and 2010 compared to SharePoint 2013, migration was not as simple as originally planned. After considerable investigation and research, the intranet team chose a combination of PowerShell scripts and the Metalogix Content Matrix SharePoint migration tool to accomplish this part of the project.

This let the development team use an "attach and reattach" approach when migrating collaboration sites. This proved to be a key innovation, because it preserved critical parts of the sites without affecting how employees would use collaboration sites on the new intranet. For these areas, the team mapped a lot of metadata. This was especially complex given the consolidation of content that had been living across 13 intranets.

The team also wanted to allow the local sites to continue to have flexibility in how they manage their content — such as allowing different metadata fields for procedures and policies for different locations. This increased the complexity of the migration but, in the end, satisfied the local requirements of the mine sites well.

- **Analytics and measurement.** SharePoint 2010 offered limited analytics out-of-the-box, so the previous version of Conveyor was unable to determine key metrics. It was also difficult to demonstrate to executives why the intranet was an important communications tool, because the team could not report on how many people had viewed the articles. This lack of analytics also affected the entire communications and collaboration strategy, making it hard to match enhancements, ideas, and plans to user preferences.

DESIGN REVIEW

Homepage

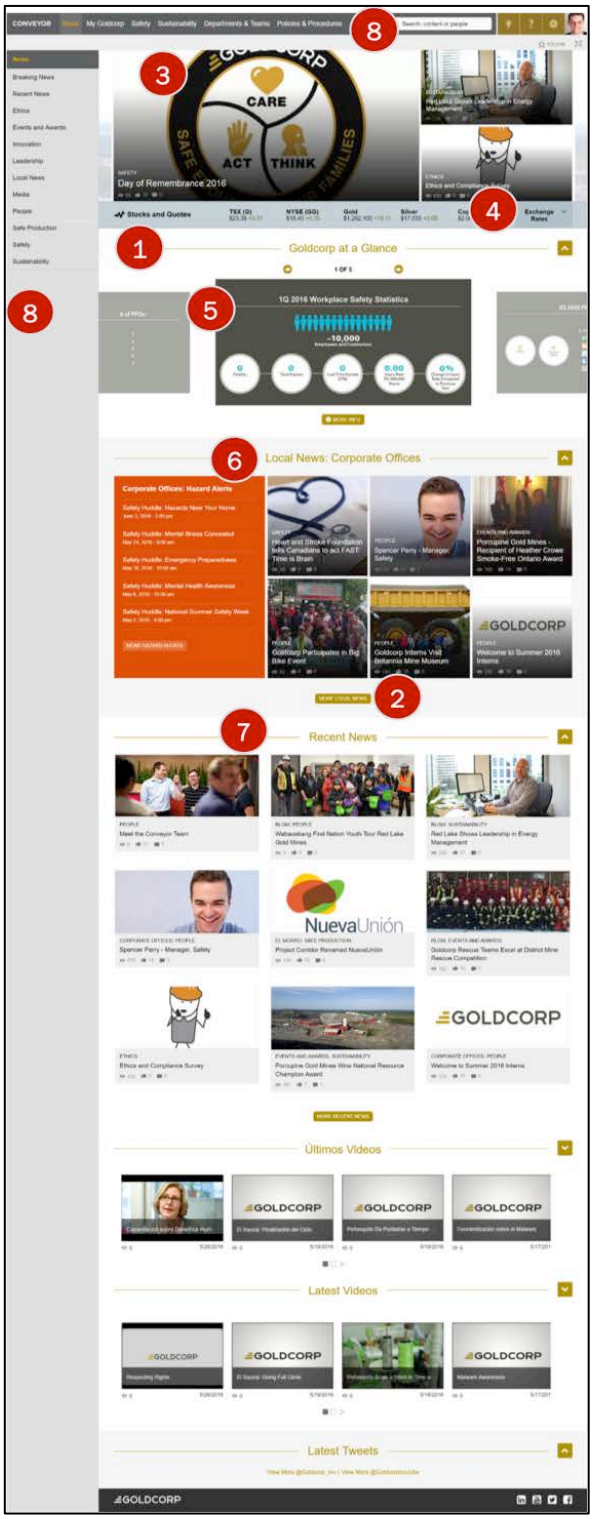


Image 39. Goldcorp Intranet New Homepage. Goldcorp's new intranet homepage includes news, stock information, and the price of gold. *Goldcorp_02_home_live.png*

Homepage Highlights

1. **Clear sections.** The homepage is divided into sections, each of which is visually delineated with backgrounds and headings. The whitespace gives users a breather, making the page seem uncluttered.
2. **Smooth style.** Surely, the color gold had to be used somewhere on this site. Rather than having it dominate in a gaudy way, however, the gold text is used for headings and other accent features that complement the gray backgrounds.
3. **Top section.** The homepage's top section displays anywhere from two to six featured news items. Each includes a topic, title, and image, with social icons at the bottom. This top section is reserved for business-critical content, leadership messages, and content that promotes company culture.
4. **Stock and quotes.** The stock price appears below the main banner, reminding people about the company's performance at a glance, something that is of particular interest to employees with stock options or personal investments. The page also shows the current price of gold and other precious metals, as they are also of interest to employees.
5. ***Goldcorp at a Glance*.** This section displays metrics integral to the business, including the company's relevant quarterly numbers and safety-related statistics. The section is updated quarterly and sometimes more frequently depending on the public release of figures. The visual design uses bleeding to indicate additional information to the right and left. Small forward and backward arrows and text such as "*1 of 5*" also show that information exists beyond the one visible card.
6. **Role dictates local news.** The personalized homepage means that when employees sign in, they see local news about their particular role, whether they are in a mine or an office. For example, employees working at the Red Lake Gold Mine office would see "Local News: Red Lake" on their homepage. Content in this section is news and communication specific to the location, such as local community events and local people news. As with items in the homepage's large top section, each news square includes a topic, headline, and image, with small icons for social features. On the left of this section is a list of *Hazard Alerts*, which help keep all employees aware and safe. All section features make logged-in users feel valued and informed about their location. Local mine sites manage the selection and prioritization of the news that appears on their area's homepage.
7. **Global news.** The *Recent News* section (below the local news) features global news for the whole company. This section helps promote consistent thinking about corporate goals and information. It also supports Corporate Communications' goal to increase the visibility of news and communications throughout the intranet. News is updated daily, as there is a high demand for it from all business areas. The Internal Communications group manages the selection and prioritization of homepage content.
8. **Navigation.** Both the top horizontal navigation links and the left-side navigation are easy to spot. While it can be tempting to collapse the menu on

desktop in a responsive design, displaying navigation is expected there and also helps usability. It advertises the links that are there, without making people click to expose them.



Homepage, Phone

Image 40. Goldcorp Intranet Mobile Homepage. The mobile homepage includes all of same content as the desktop view, but arranged in a way that's easy to handle on a small screen. *Goldcorp_03_homemobile_live.png*

Homepage, Phone Highlights

Although it's laid out differently than the desktop version, employees benefit from being able to read the news on any phone. Because field workers have all different types of devices, the design had to flow to suit different screen sizes.

1. **Top articles still on top:** On desktop, the main section at the top houses three articles. On mobile, these same three articles appear first, but the box is smaller and all three items are arranged vertically to accommodate a phone screen.
2. **Smaller:** Some sections are arranged the same as on desktop, but simply get smaller on a phone.
3. **Shifted:** In some sections, the elements are shifted around for a phone.
4. **Vertical:** Some sections go completely vertical.

News Article

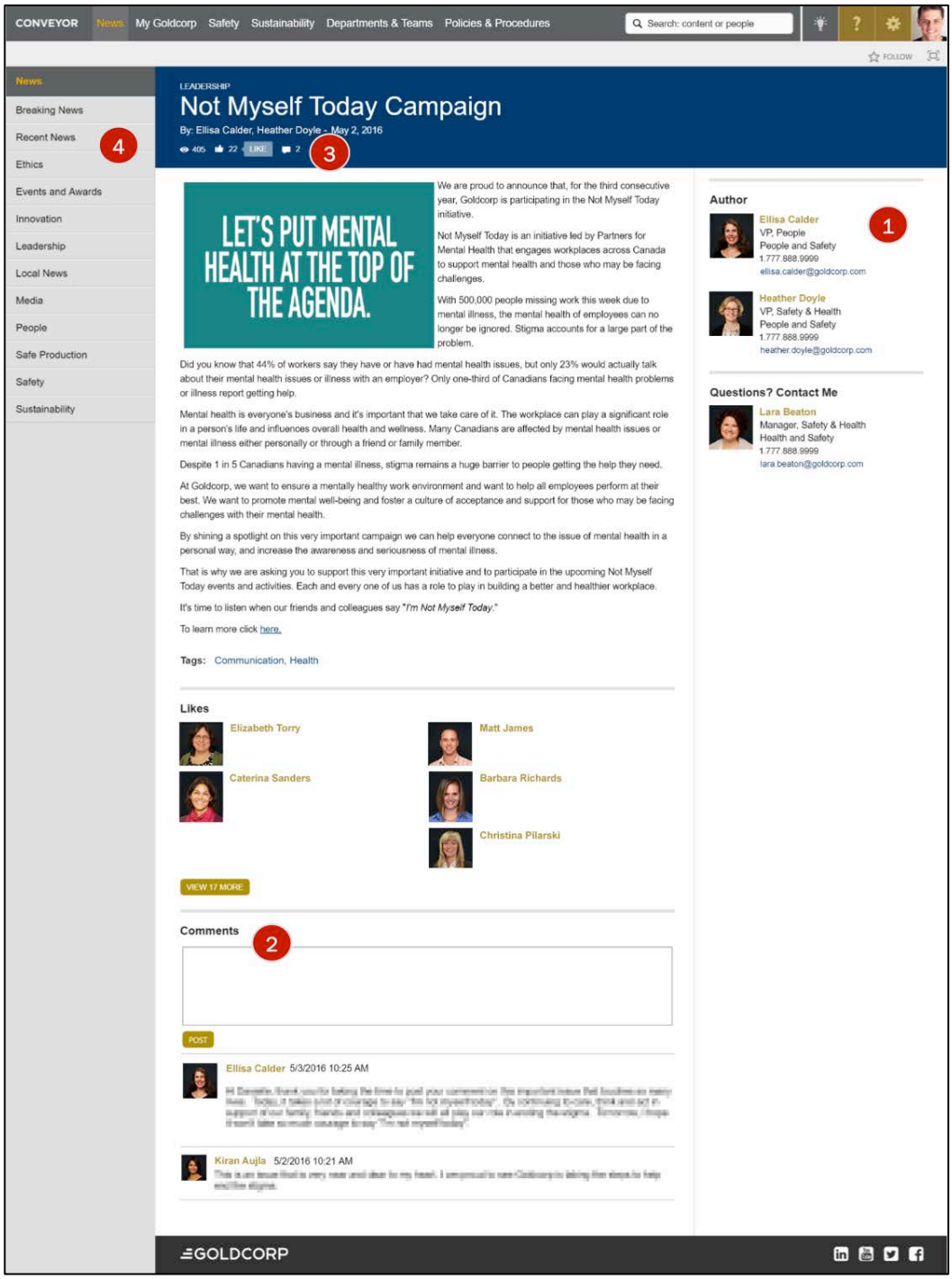


Image 41. Goldcorp Intranet New Articles. News articles include a title, image, social statistics, and the ability to comment. *Goldcorp_04_newsarticle_live.png*

News Article Highlights

1. **Author.** It's easy to find and contact an article's author, as the author's name, picture, and contact information appear in the right rail. This ensures that employees know which of their colleagues are writing the news and how to contact them if they are interested in doing so.
2. **Comment.** Another way to participate in the discussion is to like or comment on an article. The interface for this is expected and simple.
3. **Reading statistics.** Employees can get a sense of how popular an article is with other site visitors by scanning the number of views, likes, and comments on the article.
4. **Context menu.** The left-side navigation menu changes depending on which top-level horizontal navigation item is selected. This progressive disclosure keeps users focused in the current section and eliminates clutter.

Training Tool

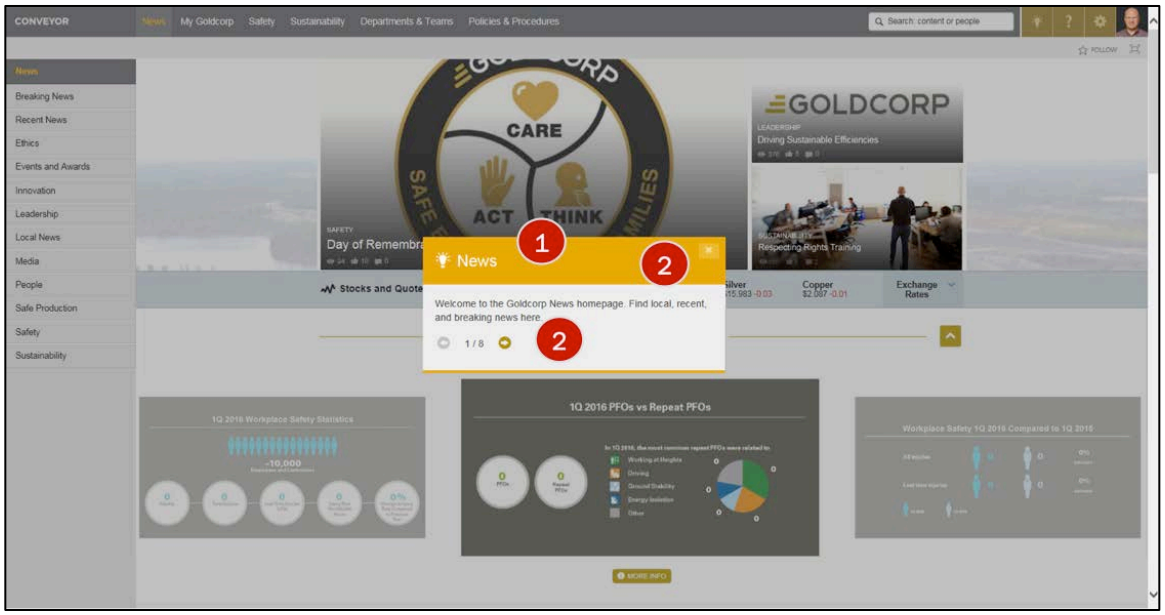


Image 42. Goldcorp Intranet Training Tool. Employees can switch on a simple training tool to get inline tips about the site's sections. *Goldcorp_05_embeddedtraining_live.png*

Training Tool Highlights

In an effort to help employees quickly learn about Conveyor's many helpful areas, the team created a training tool. Users can launch self-guided training exercises to learn about the features and functionality of each intranet area. This both informs employees and increases their confidence as they use the design. It also supports the adoption of key features and reduces the effort required to train employees on how to use the intranet.

1. **Info box.** When the training tool is activated and the user clicks a link to an intranet area, a light box launches describing that area.
2. **Continue.** The user can "x" out of the box, or use the arrows at the bottom to see additional tips. With features such as this, when a tip proves helpful, users will often scroll through more of them.

News Category Page

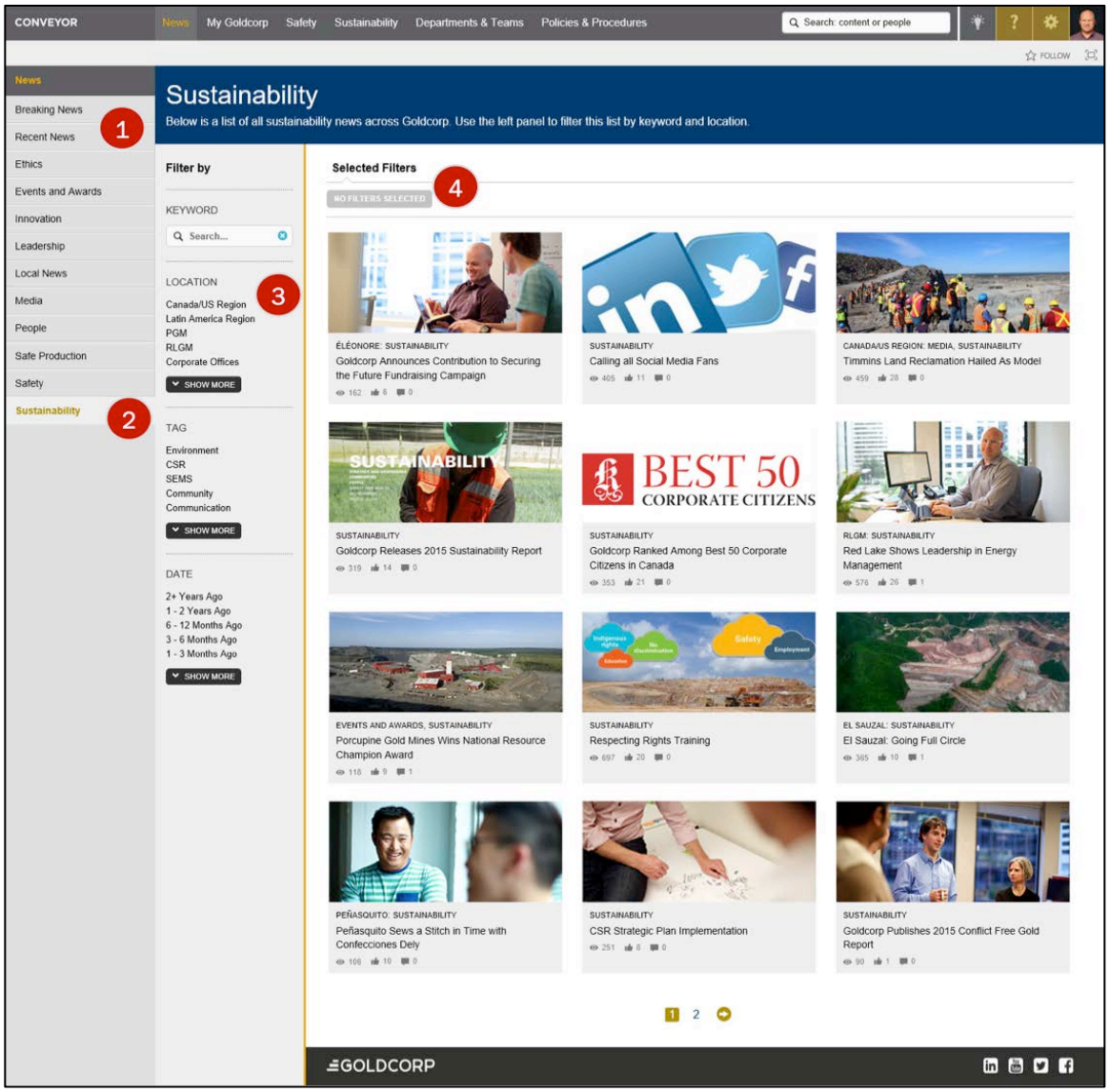


Image 43. Goldcorp Intranet News Categories. Categories help employees easily find the news they are most interested in.
Goldcorp_06_newscategorypage_live.png

News Category Page Highlights

The news on the new intranet balances the local news that users have come to expect from the previous intranet with broader corporate messages (global news). Showcasing local news encourages local teams to share information relevant to their office or mine, which makes the intranet more inclusive and interesting.

1. **Topics.** To organize the vast amount of news, users can first choose a category from the left-side navigation, which includes categories such as *Breaking News*, *Recent News*, and *Ethics*.
2. **Selected category.** Once a category is selected, a light gray box appears around it and the type turns from regular black text to bolded gold text. These visual signposts help users find their way more easily. And, if users are interrupted, they can get back up to speed quickly.
3. **Facets.** Selecting links in the *Filter by* section in the second left-side column lets users drill down to see only the articles they want. They can view articles by publication date, importance, user location, and language.
4. **Selected filters.** Once selected in the filters list, the keyword appears at the top of the page under the *Selected Filters* heading. This reminds users which results are showing, and lets them deselect filters if they so choose.

My Goldcorp

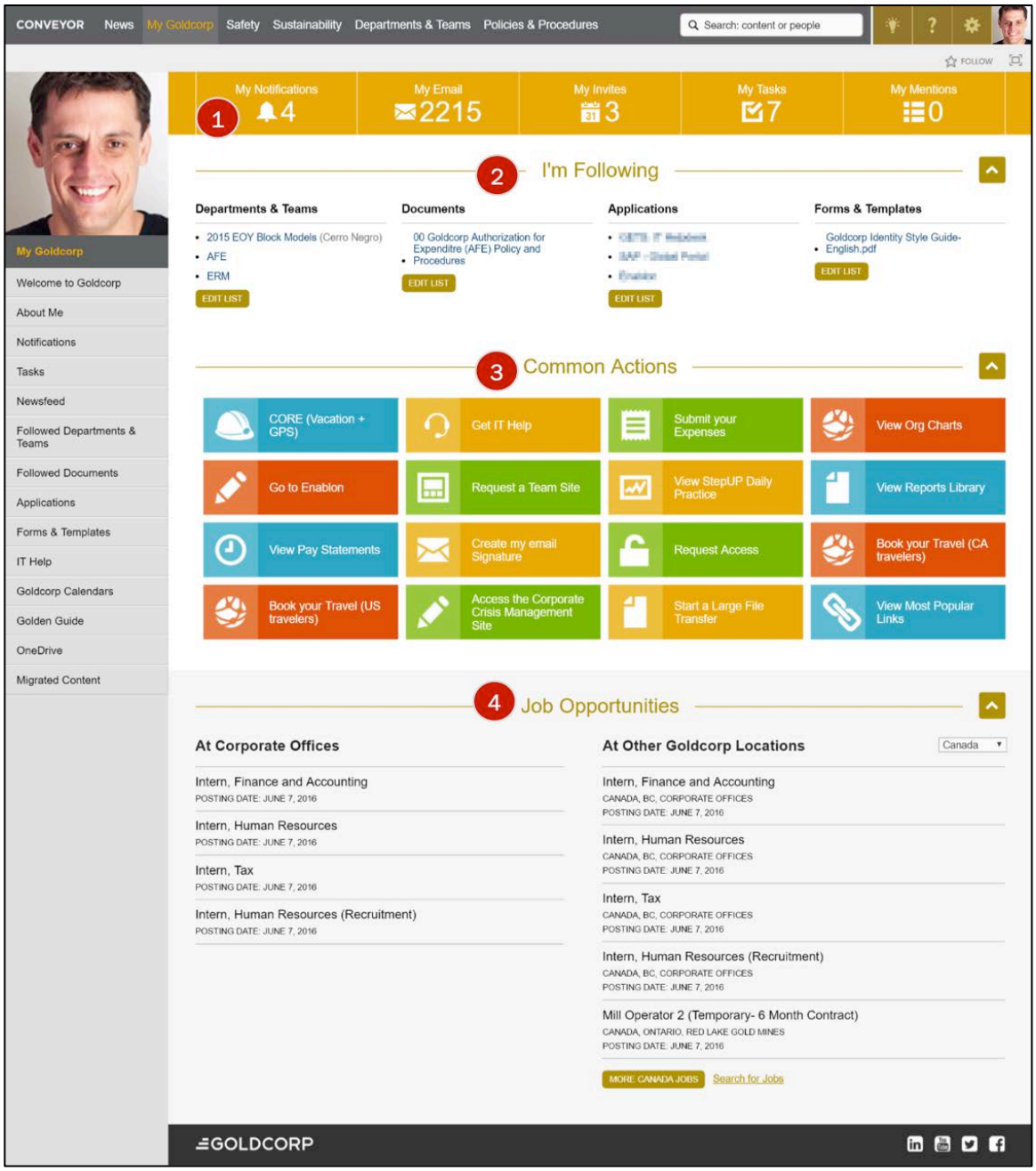


Image 44. Goldcorp Intranet *My Goldcorp*. *My Goldcorp* includes notifications and email, plus many other features targeted to the logged-in user. *Goldcorp_07_MyGoldcorp_live.png*

My Goldcorp Highlights

The *My Goldcorp* hub helps employees find whatever they need to get work done, inside or outside of the intranet.

1. **Notifications.** This page acts as a dashboard for many users, letting them easily and quickly see many of their workflows all in one place, rather than having to scour the intranet for them. The alert bar appears as a yellow banner across the top of the page and includes *My Notifications*, *My Email*, *My Invites*, and *My Tasks*.
2. **Bookmarks.** The *I'm Following* section toward the top of the page consolidates documents, applications, forms, workflows, templates, and team sites selected by the user. This helps employees be productive, organized, and in complete control.
3. **Applications.** The *Common Actions* section displays a broad collection of applications that employees use every day, including timesheets, expense tracking, vacation requests, and IT support. The terminology — such as *Get IT Help* and *Book your travel* — is easy to understand and task-based, rather than branded or bogged down in other confusing nomenclature. The applications are not part of the intranet or SharePoint, which makes these links tremendously helpful: they consolidate everything so it's easy to find.
4. ***Job Opportunities*.** The HR department encourages employees to look for job opportunities within Goldcorp so the company can retain and grow good employees. Thus, internal job openings take up a significant part of the page. The section shows jobs based on the user's location on the left and jobs at other offices on the right. Employees can also use the search link at the bottom or use the drop-down to sort by country.

My Goldcorp, Tablet

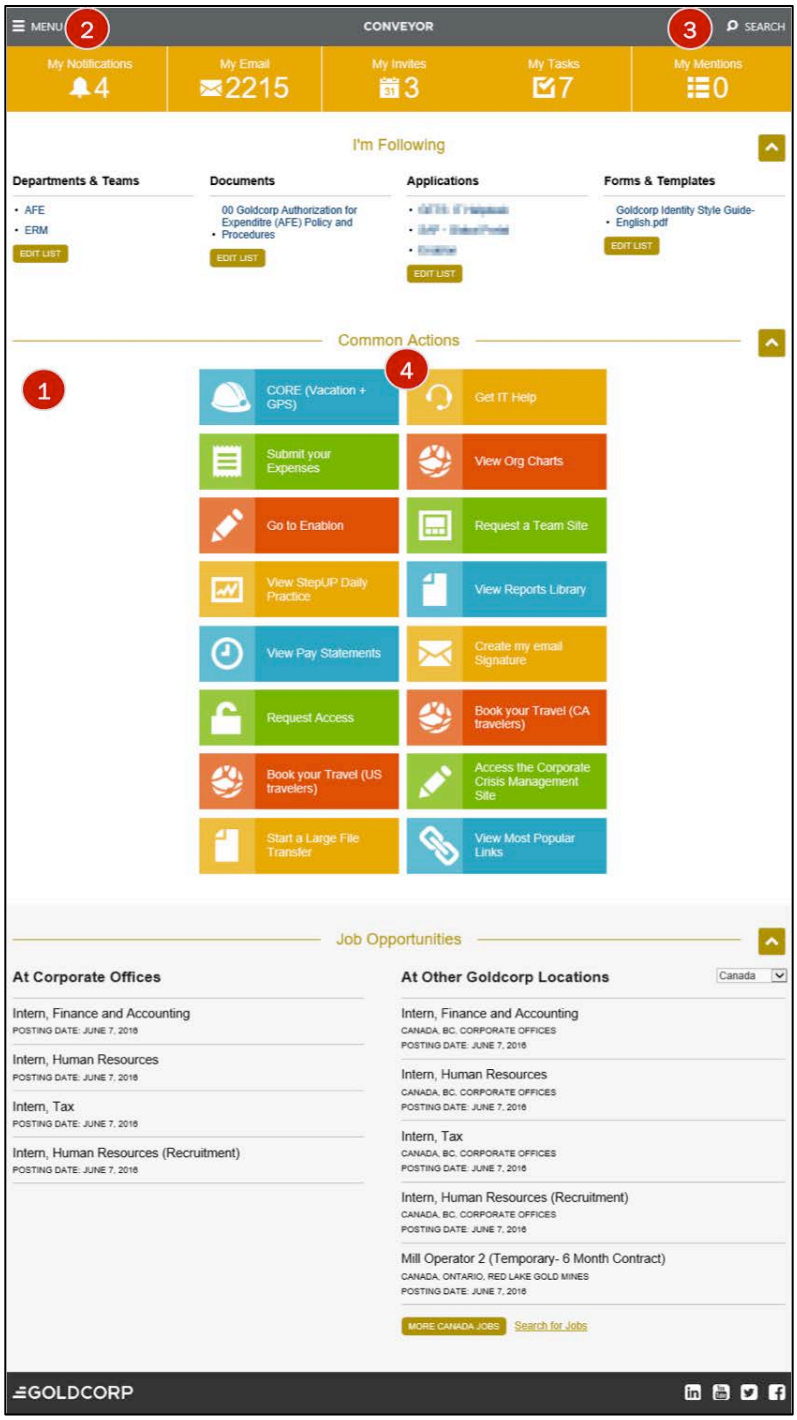


Image 45. Goldcorp Intranet Tablet Version. The tablet version of *My Goldcorp* adjusts the page to adapt to the smaller screen real estate. *Goldcorp_08_tabletMyGoldcorp_live.png*

My Goldcorp, Tablet Highlights

To make the best use of the device and its real estate, some elements are collapsed or moved for viewing on the small screen. The changes include the following:

1. **User's picture removed:** To save space, the logged-in user's picture does not appear on the tablet site.
2. **Menu collapsed:** The global, horizontal navigation is collapsed in a hamburger menu to save on screen real estate.
3. **Search collapsed:** The search field is collapsed to a magnifying glass.
4. **Rearranged columns:** *Common Actions* appears as two longer columns rather than the wider, shorter desktop version.

Key Contacts

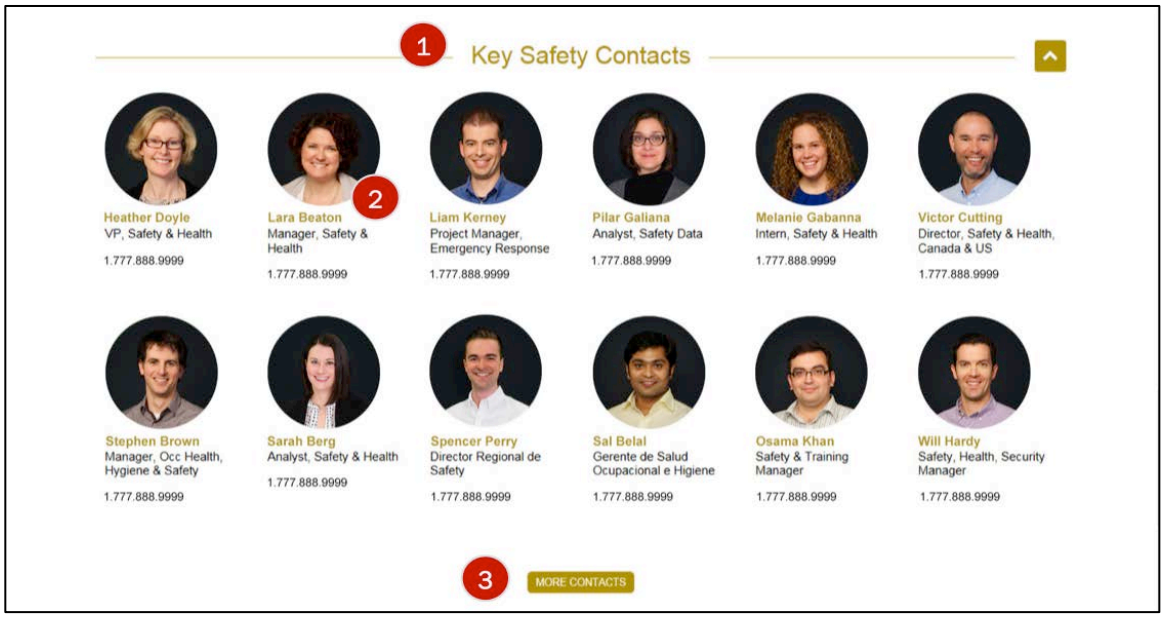


Image 46. Goldcorp Intranet Key Contacts. This page gives employees suggestions for people to contact about various safety topics. *Goldcorp_09_keycontacts_live.png*

Key Contacts Highlights

Throughout the intranet, a key contacts panel shows leaders in the organization that employees can contact to learn more about a specific area of Goldcorp's business. This ensures a focus on people and also ensures that employees know whom to approach with questions.

1. **Topic.** The topic of expertise is listed at the top; this reinforces the user's location and the general skillset/topic being explored.
2. **Information about each contact.** A photo, job title, and phone number suggests the individual's area of expertise and also communicates to users that it's okay to contact the person. This information can inspire impromptu working relationships.
3. ***More Contacts*.** This button, visible at the bottom of the page, offers users additional contacts; this way, the same few people will not always be the ones contacted.

Departments and Teams

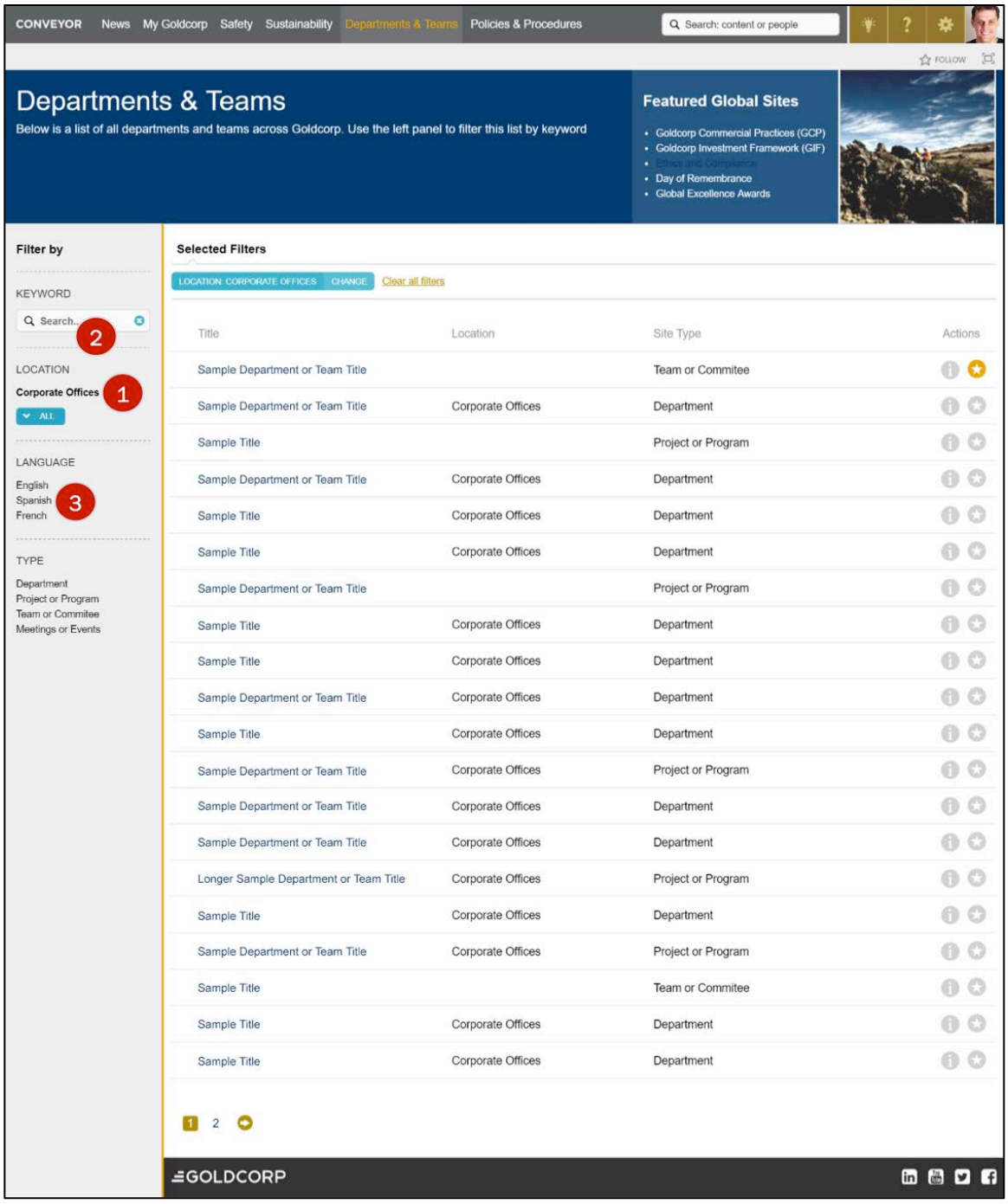


Image 47. Goldcorp Intranet Directory Page. This directory page helps employees find and navigate to the team sites they need. *Goldcorp_10_departmentsandteams_live.png*

Departments & Teams Highlights

The *Departments & Teams* page acts as a directory for the thousands of team sites across the organization. Knowing the different workgroups and collaboration spaces at an organization helps employees not only appreciate the many resources available, but can also help them be more effective at their jobs. Part of being successful is knowing which teams exist and what they do. Finding the right information and accessing people at the right time is invaluable. Prior to this new design, employees found sorting through the organizational directory cumbersome and time consuming.

1. **Preset filters.** Filters related to the user's location and role are selected by default. This expedites users' search by honing in on related sites and displaying fewer results by default. This is important, as many team sites are irrelevant to employees outside of a specific department or location. However, the directory is also flexible: employees can easily deselect any of the filters to expand their search to all Goldcorp locations.
2. **Keyword.** Users can search for any keywords, such as those related to a topic or team space. The search field provides flexibility and control when users have a good idea of what they are looking for.
3. **Language filters.** Users can choose to view team sites in any of the three languages spoken at Goldcorp (Spanish, English, and French).

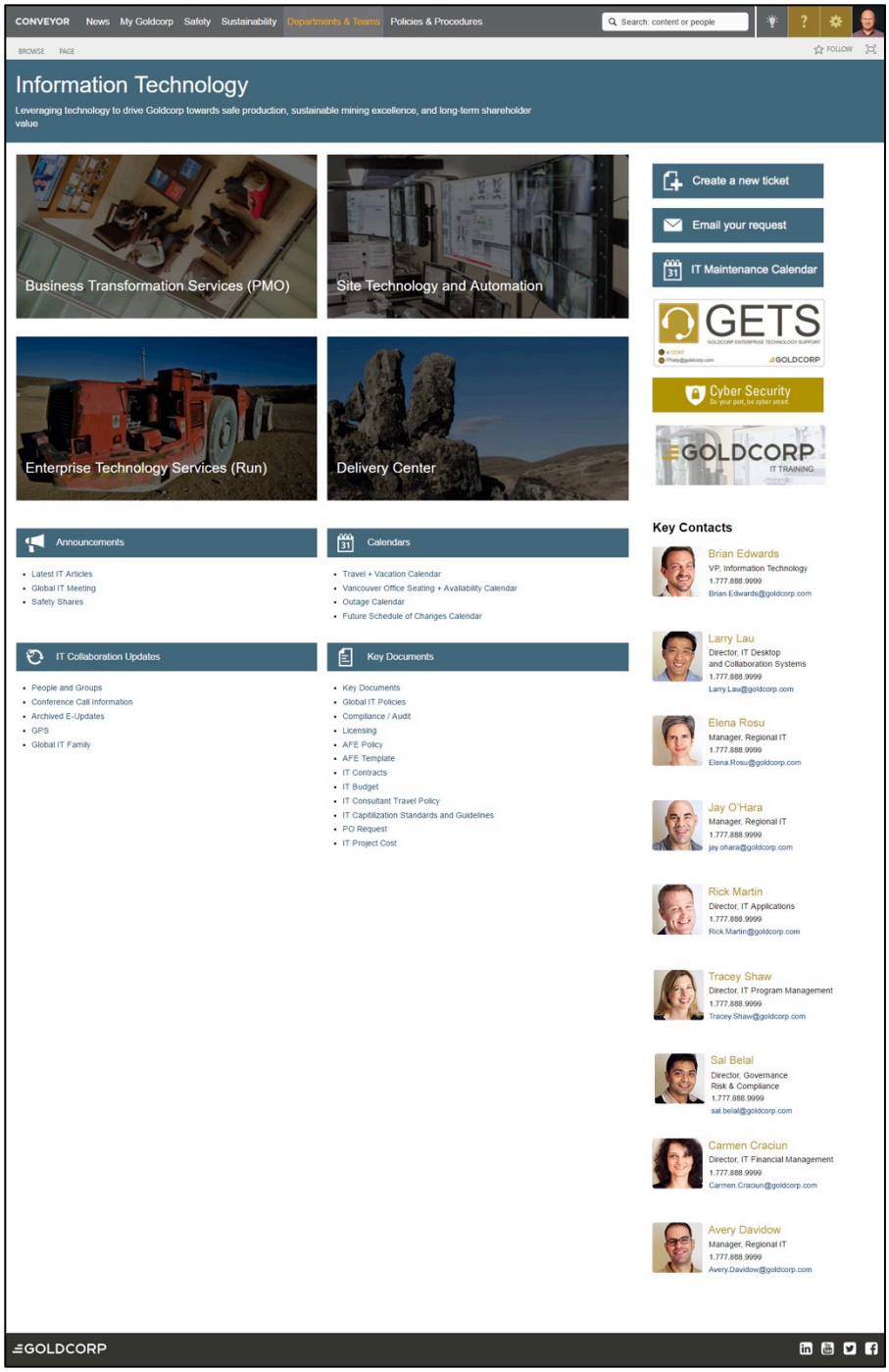


Image 48. Goldcorp Intranet Team Sites. Team sites are the backbone of collaboration within Goldcorp. The intranet's team site design has been customized to emphasize projects and people, helping employees quickly find documents or enter requests. *Goldcorp_11_teamsite_live.png*

Policies & Procedures Category

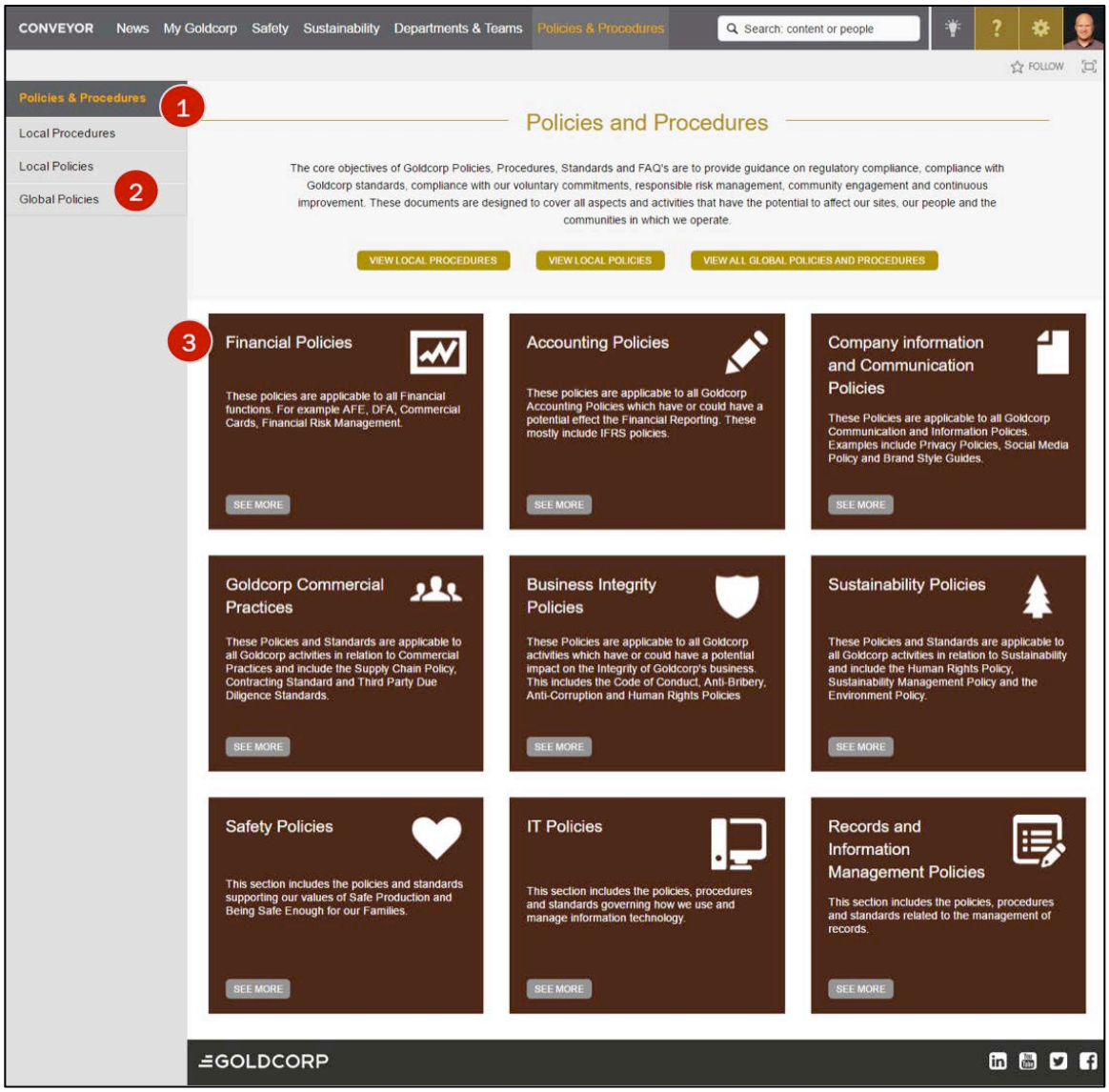


Image 49. Goldcorp Intranet *Policies & Procedures*. Filters and search expedite the act of finding policies and procedures on the intranet. *Goldcorp_12_policiespage_live.png*

Policies & Procedures Category Highlights

1. **Default filters.** Preset filters, such as local content, are selected by default. This helps users navigate to sites or documents they're most likely to need.
2. **Filters.** Multi-lingual capabilities and permission indicators let users quickly find what they need.
3. **Legible headings.** Each dark brown box includes a legible white heading, which helps users scan the page quickly.

Policies & Procedures

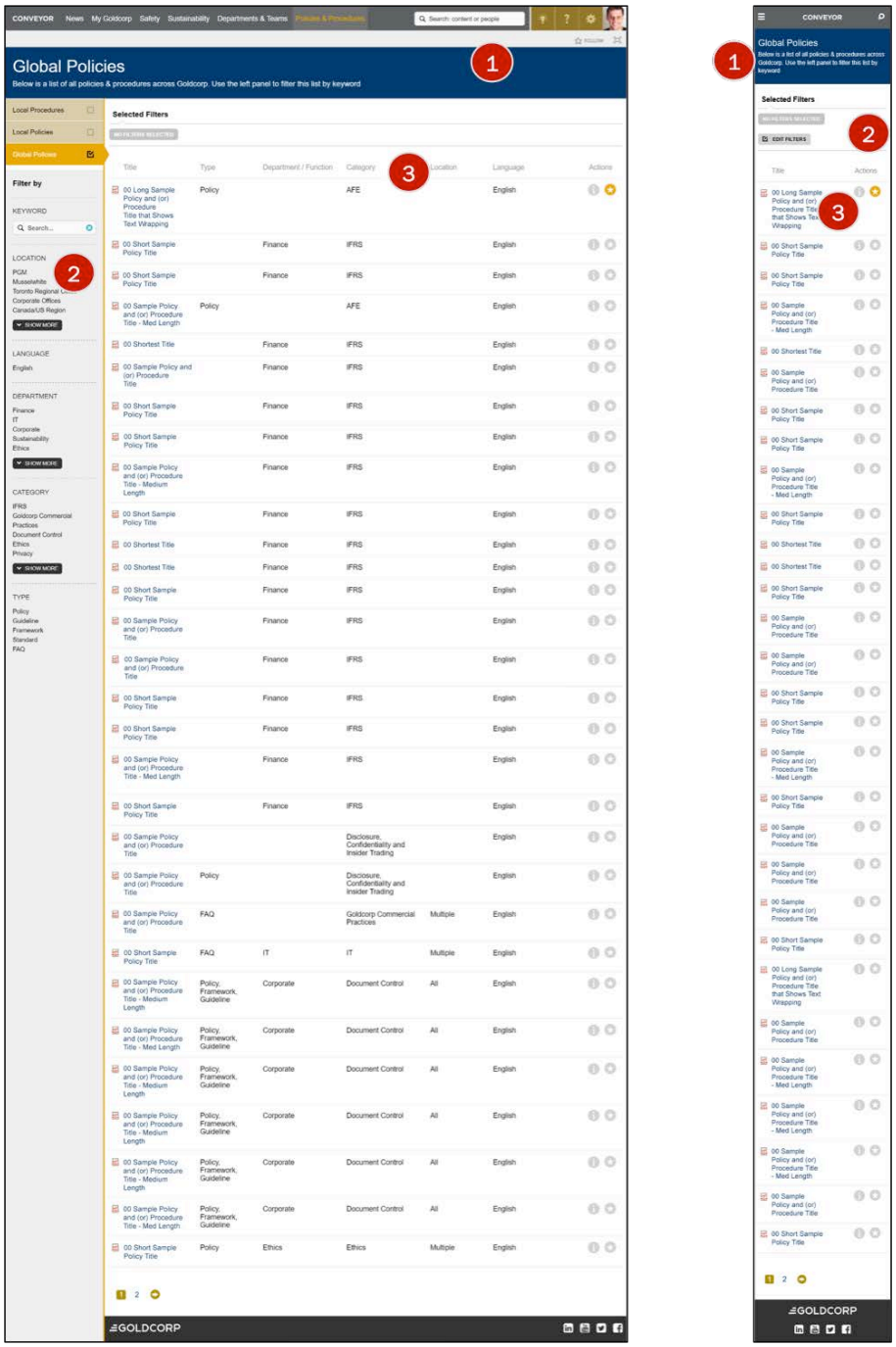


Image 50. Goldcorp Intranet *Policies & Procedures*. Some elements are presented differently on desktop (left) and phone (right) to ensure the best UX for each device. *Goldcorp_13a_policiesandprocedures_live.png* and *Goldcorp_13b_mobilepoliciesandprocedures_live.png*

Policies & Procedures Highlights

1. **Page summary.** A short summary describes the page for users. It appears at the top of the screen on both desktop and mobile.
2. **Filters.** The filters are exposed on desktop, but collapsed on mobile. Although it would be nice to show filters on mobile, doing so would clutter the small screen.
3. **Columns.** The desktop view displays seven columns of content by default, while the phone UI displays only two. This tradeoff was necessary to accommodate the small screen, and the designers didn't want to limit the space used on the desktop just to make the site responsive.

Safety

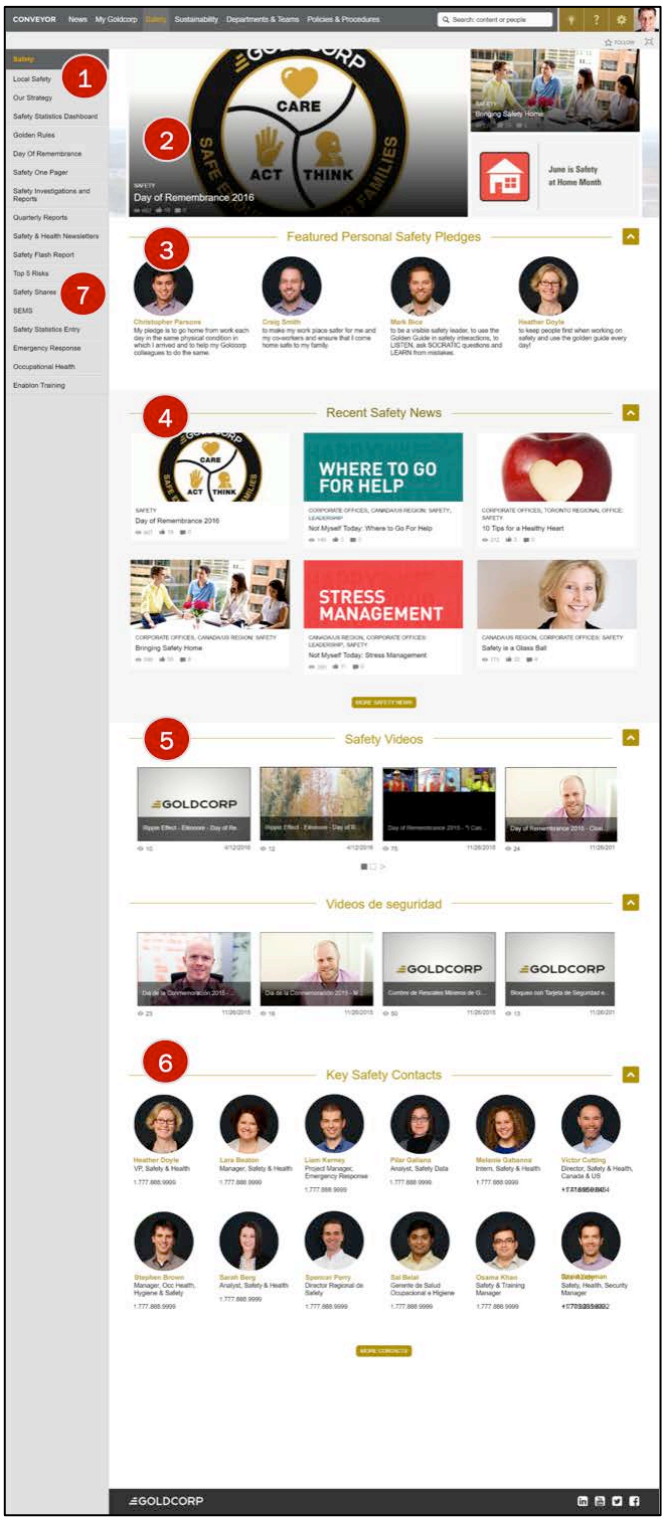
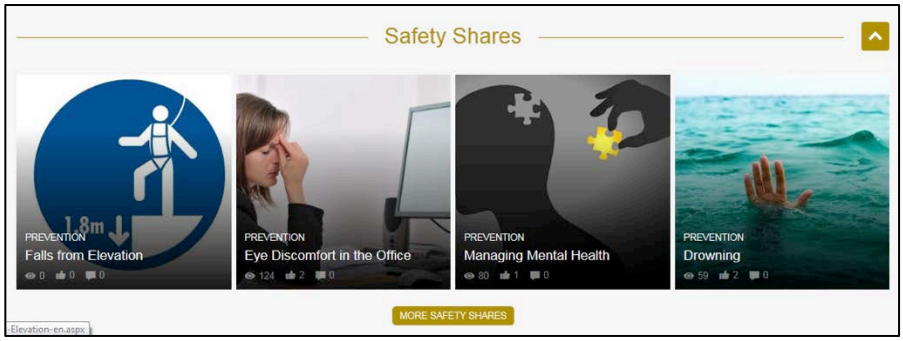


Image 51. Goldcorp Intranet *Safety*. Various stories about safety inform employees and convey the organization's commitment to this cause.
Goldcorp_14_safety_live.png

Safety Highlights

This page is dedicated to safety, a key priority at Goldcorp. The page makes it easy for employees to share safety information between mines and offices. All Goldcorp users can access this page, and it displays the same content for everyone.

1. ***Local Safety*.** This link in the left navigation leads to the user's local safety site based on location settings. (Once there, users can easily navigate to other local safety sites.)
2. ***Safety Spotlight*.** The global safety team uses this area to display news articles related to safety and other information related to specific campaigns and initiatives, such as the publication of a new *Golden Guide*. This top position is always on the page, whether viewing on desktop or phone.
3. ***Featured Personal Safety Pledges*.** To demonstrate how serious they are about safety, employees make safety pledges and enter them on their My Site. The safety team determines which pledges will appear in this section.
4. ***Recent Safety News*.** This section sniffs the *News* page for articles tagged with "safety" and automatically consolidates the latest ones in *Recent Safety News.* This is much easier than searching or trolling all news. Clear titles and related images make the safety articles seem interesting and more clickable.
5. ***Safety Videos*.** As with *Recent Safety News* section, the latest safety-related videos appear here.
6. ***Key Safety Contacts*.** Trained safety experts are noted so all employees know where to turn with ideas or questions. *More Contacts* leads to a comprehensive list, including local safety managers.
7. ***Safety Shares*.** At Goldcorp, every meeting begins with a "safety share" — an observation about a safety incident or new safety-related information. The person running the meeting might offer his or her own share or use the intranet's *Safety Shares* area to get ideas for what to share (see below).



This *Safety Shares* web part is activated when a user clicks on "Safety Shares" in the screen shown above.

Applications

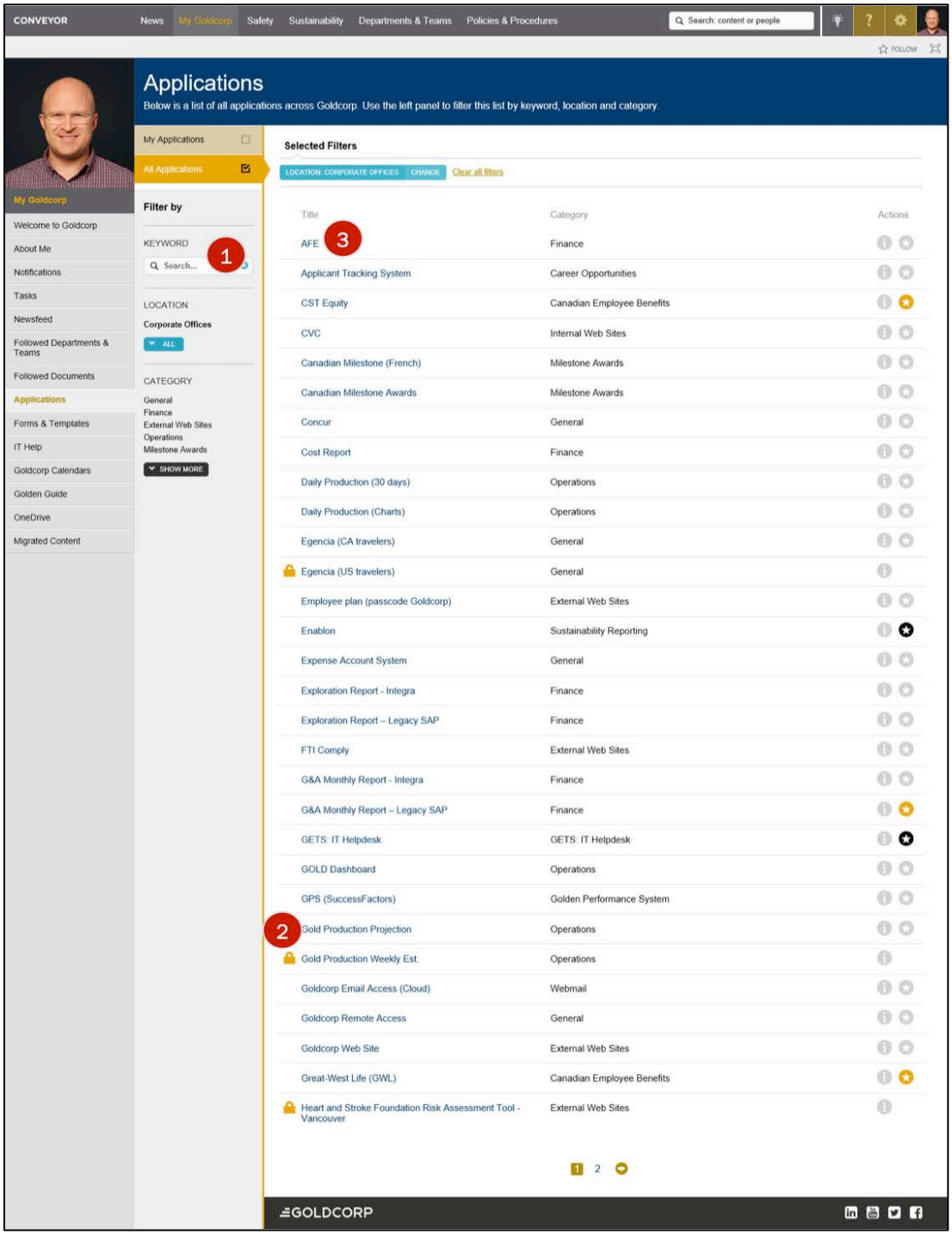


Image 52. Goldcorp Intranet Applications. The team researched user workflows to make sure helpful applications were easy to find and access on this page. *Goldcorp_15_applications_live.png*

Applications Highlights

Many applications are available on or via the intranet. The *Applications* section consolidates these to make them easy to find and access.

1. **Filters and search.** These tools make it easy to filter through all of the applications.
2. **Access.** A lock icon indicates which sites the user has permission to access.
3. **Application for Expenditure Workflows (AFE):** Employees can request budget for costs above preset limits. The new process clearly outlines where the request will go and who to contact with questions, and ensures emails don't get lost in inboxes.

   ***Mine site workflows*.** These workflows include several individual business processes that rely on local employees to complete. Users can capture information and start processes on tablets or smartphones, whether online or not. If working offline, the application syncs to Wi-Fi as soon as the mobile device is on the internet again.

   ***Enhancement request workflow*.** To ensure that Conveyor remains one of Goldcorp's key collaboration and communication tools and continues to support business needs, users can submit requests for enhancements. The requests are then reviewed, scoped, and developed. This system also lets similar solutions be used across mine sites, letting those sites benefit from the enhancements.

Access Request Form

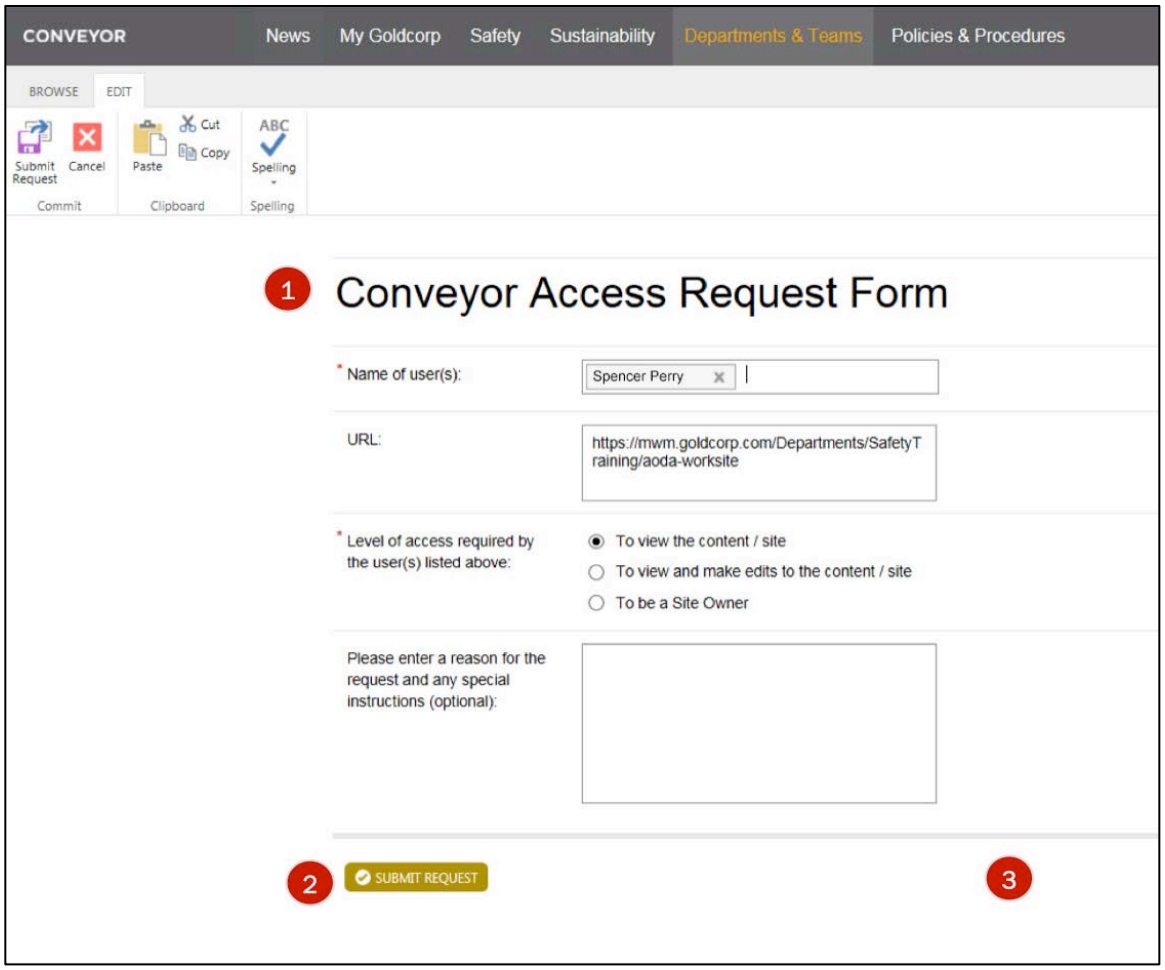


Image 53. Goldcorp Intranet *Access Request Form*. A lock icon next to an item in a list means that the logged-in employee does not have access to that item, but can request access using this form.
Goldcorp_16_accestrequestform_live.png

Access Request Form Highlights

Rather than locking employees out of a site and offering no further help, the intranet lets employees contact the site owner (via a form) by clicking the *Request Access* link on *My Goldcorp*. The business units, not IT, manage their own permissions. This enables control over the site by its administrator, who can grant individual employees permission to access and participate.

1. **Form title.** The visible title affirms to users that they are on the expected page.
2. **Clear call to action.** The *Submit Request* button is visible and offers an understandable call to action.
3. **Brief form.** The form is short and easy to see in a small space, and the left-aligned labels and fields make it easy to scan.

DESIGN PROCESS AND USABILITY WORK

The project consisted of the following core phases: discovery and design, implementation, migration, testing, and rollout. These phases followed a planning and approval process that included engagement from senior and C-level executives, mine general managers, and other key organizational stakeholders.

Discovery Phase

- **Heuristic overview and past survey data.** Habanero and Goldcorp's history and strong working relationship allowed for a smooth transition from supporting the current Conveyor to engaging in design and visioning exercises for the new intranet. There was considerable overlap between the team that had supported Conveyor for years and the design team for the new intranet; this gave team members a good head start going into the discovery phase.

  Team members conducted heuristic reviews so they could formally identify some of the existing intranet's UX issues. Surveys and usage data from previous Conveyor initiatives also had a big influence on developing the design principles and on the research that went into creating the UX. Ultimately, decisions had to be based on the established goals of integrating a network of intranets, improving communication and collaboration, and strengthening Goldcorp's existing digital workplace landscape.

- **Interviews.** The team's business analyst, interaction designer, and other members of Goldcorp's project team joined forces to conduct 54 interviews with company executives and other representatives across functions and regions. These interviews included stakeholders from IT, HR, corporate affairs, strategy, operations, and communications. The team also spent time talking with mine general managers and end users to better understand how the existing intranet was working for them. These interviews also served as the starting point for change management activities, as they were the first communication touch point about the redesign.

  The interviews unearthed 10 key themes to guide the project: communications, system integration and reporting, a unified UX, security and permissions, collaboration, training and adoption, mobility and reach, videos, main content areas, and search and people finder.

  Early concepts and wireframes were used in some of the interviews to communicate a vision for the new Conveyor and garner initial feedback on it. The team used this as a design exercise and started iterating those wireframes throughout the interview period.

- **Design principles.** The Habanero and Goldcorp teams also created design principles to guide the solution's development. These principles follow here:

DESIGN PRINCIPLES	
Design Principle	**How It Was Applied on the New Intranet**
Simplify and standardize	The 13 previous corporate portals were merged into one UX, meaning that all users see the same IA organized into five key hubs: *News*, *My Goldcorp*, *Safety*, *Sustainability*, *Policies & Procedures*, and *Departments & Teams*.
Design localized, targeted experiences for end users	Conveyor does not have a traditional homepage. Instead, users see their local mine site news, alongside the global corporate news. Location is also a pre-set filter whenever a user searches for content.
Prioritize key content	Intranet stakeholders can highlight key content for users to see in the *News*, *Safety*, and *Sustainability* sections, as well as elsewhere on the intranet.
Move toward transparency	Conveyor now has a *Goldcorp at a Glance* panel that showcases relevant company metrics. All team site names are visible to users, and users can request access to sites if they lack permissions. Business units, rather than corporate IT, are now accountable for granting these permissions.
Provide in-the-moment training	With one click, users can see self-guided training for common intranet tasks in specific portal areas.
Represent Goldcorp's priorities and values	The intranet's new structure demonstrates Goldcorp's commitment to people, safety, and sustainability — including in top-line items in the navigation bar dedicated to these areas. The portal's governance committee keeps the company vision and business priorities in mind when reviewing future enhancements and current performance.
Keep the focus on people	Employee information and pictures appear throughout the portal next to news articles and other content to show who the SMEs are for specific organizational areas. The *My Goldcorp* hub is designed with the individual in mind, allowing users to customize their followed sites, documents, forms, and applications.

Design Phase:

- **Wireframes and mock-ups.** Once design team members had a stronger sense of direction for the new Conveyor, they created wireframes and mock-ups to iterate various approaches within that direction and communicate the new IA and design. Workshops were conducted with individuals who owned intranet areas. For example, to better understand how to design the news experience, the team met with the Internal Communications group to learn how the upgraded solution could better support them. The team conducted card-sorting exercises with these participants in an attempt to sort current news content and reorganize it into potential new structures and IAs. It was through these activities that the team landed on the new structure for news and communications for all of Conveyor: categories, tags, roll-ups, feature banners, and so on.
- **Prototyping.** A prototype was created to demonstrate how the intranet would look and function for end users. This was essential to demonstrating the portal's responsive nature and an important tool both in increasing stakeholder engagement and communicating the big changes that the upgrade would bring. Executives were able to see what the team was proposing, which helped set the stage for change management activities.

  The prototype also served as the foundation for usability testing. The team conducted 14 tests across 10 locations, including with eight people who were initially interviewed about the previous solution. The main theme that emerged from this testing was how professional and organized the intranet felt. It also highlighted the benefits of personalized content inside a more centralized structure, and conveyed an understanding of how users felt about the coming changes. The designs and prototype were updated based on this feedback, proving that end-user testing is an invaluable part of any intranet engagement.
- **Workshops and governance.** Governance and change management work for the intranet was initiated in the design phase and continued throughout the project. The goal was to get out in front of any roadblocks and ensure that Conveyor would continue to thrive post-launch. A content security framework was also established around this time, which helped support the permissions management decisions that later became such an integral part of the project.

Implementation Phase

The intranet implementation phase began in April 2015 and completed at the end of August 2015. This was followed by a month of stabilization and two weeks of user acceptance testing, followed by go-live. The development work was done with a core team of 10 on the Habanero side, with additional support and execution provided by Goldcorp as needed.

The development team conducted 10 two-week sprints. Detailed planning happened prior to each sprint to ensure tasks were achievable and resources were appropriately allocated to the project. At the end of a sprint, the remaining and completed tasks were identified and, if necessary, marked for completion in the next sprint. Each sprint ended with a walkthrough for quality assurance testers, and testing was an ongoing part of implementation. Everything was tracked in Microsoft Team Foundation Server and the team used a Kanban board to visualize progress.

Other implementation achievements included creating search results in three languages, auto-tagging certain fields to simplify the UX, and improving SharePoint's out-of-the-box parent-child hierarchy in metadata. The result is that search terms and search results encompass all three languages. (For example, a search term in Spanish pulls up translated English and French content.) Users can also navigate filters and content based on automatic location tagging, meaning that employees can find Canadian mine content by either searching within Canada or another location. Previously, users were unable to refine data at the country level or to access data tagged at the location level when searching.

The team also developed important integrations in the *My Goldcorp* hub during the implementation stage. One key area was the integration with Microsoft Exchange Online and Office 365 to surface email and calendar notifications in the alerts bar.

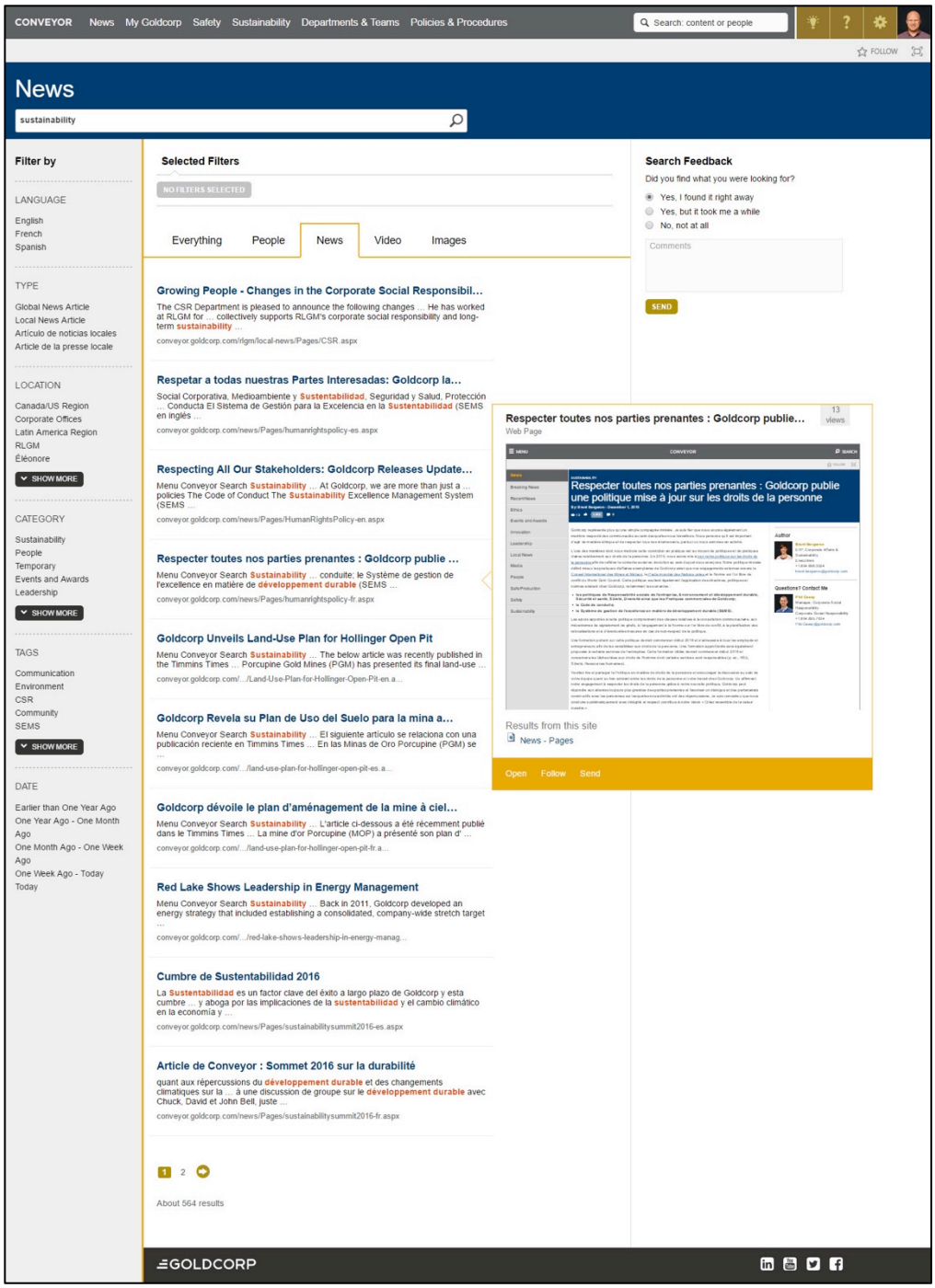


Image 54. Goldcorp Intranet Search Results Filtering. When employees search for content on the Goldcorp intranet they can navigate to a list of news articles related to their query. This provides greater awareness of corporate news items related to specific subject areas.
Goldcorp_17_searchresultsnews_live.png

Testing Phase

The team developed test cases for all features and mapped them to functional and nonfunctional requirements. Quality assurance testing was carried out during development, along with the sprint model described earlier. Bugs were logged and fixed as sprints allowed. The team conducted full regression testing during stabilization to ensure that no bug fixes caused other issues in the solution. Given the sheer amount of collaboration content on the project, including team sites let the team identify high-priority collaboration content to rigorously test.

IA Design

The new IA and navigation system gracefully organizes the core global and local information essential for employees. Simplifying the IA was a daunting task during the project, but it resulted in a smoother UX for everyone, regardless of location or language.

Instead of massive fly-out menus that differed from mine portal to mine portal, the upgraded intranet divides content into five hubs: *News*, *My Goldcorp*, *Safety*, *Sustainability*, *Departments & Teams*, and *Policies & Procedures*. Weaving localization into different content areas to create a seamless experience was a key outcome of this approach, as opposed to having large menus with dozens of options — many of which would be irrelevant to significant numbers of employees.

The team focused on streamlining and targeting the new intranet's IA. When users drill down to each section, content is prioritized and targeted based on their location. Users can also see other, nonlocal content, but it's not the first thing they see. This approach preserves the intranet's local feel, while also promoting transparency and information sharing across the organization.

Employees can easily find relevant content throughout the site thanks to faceted search and associated metadata. On the news-focused homepage, articles are surfaced based on language or location and through tagged categories of news metadata. A person's language and location are detected based on their Active Directory profile.

When searching for content elsewhere on the intranet — including team sites and *Policies & Procedures* — preset filters are applied based on the employee's location to reduce the time spent searching for information. This was essential as users were accustomed to seeing local content first, and the design team wanted to ensure the move to the new intranet would be seamless.

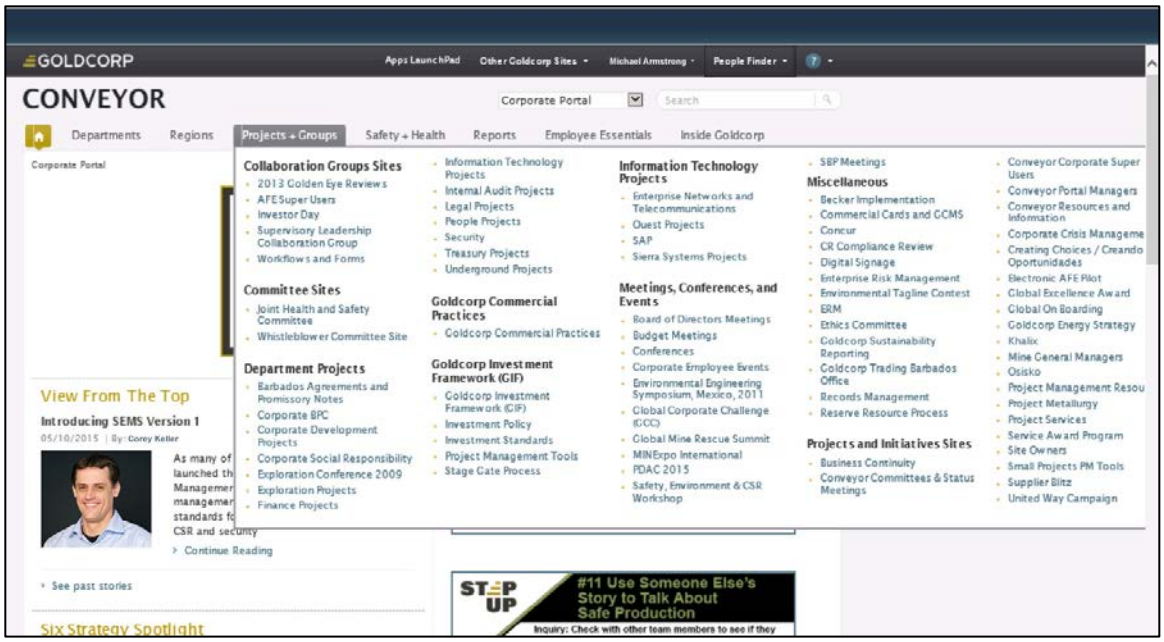


Image 55. Goldcorp Intranet Old Intranet Fly-Out Menus. An example of how large and cumbersome fly-out menus had become in the previous Goldcorp intranet. *Goldcorp_18_flyoutmenus_before.png*

Adoption and Buy-In

The team took an active approach to ensure that employees would not only use the new site, but also welcome it. Team activities included the following:

- **Have change management and training resources travel to remote sites before and after launch.** As they approached go-live, Goldcorp and Habanero intranet SMEs conducted workshops to train Conveyor leads on various parts of the portal. While many users were familiar with the old solution, the changes and capabilities in the revamped intranet were so significant that it was necessary to retrain employees to ensure they understood the new portal's power. Utilizing the Conveyor leads to deliver training was a key driver of early success; the training was delivered in person and on-site rather than via remote methods such as videoconference, so that it would be most effective. Local change leads and intranet leads also helped drive user adoption in the crucial post-launch period.

- **Execute a phased migration and controlled content clean up.** The biggest challenge during the project's final stretch was migration. Given the amount of consolidation occurring and the changes to the navigation and content structure, the team had to leverage a combination of methods and tools to migrate content. A big effort was required to clarify which content to keep and which could be archived. Decisions around content were further complicated as Goldcorp had only recently embarked on an information management project and therefore had no policies or guidelines to rely on when archiving and/or deleting content.
- **Use prototyping as a method for buy-in, Agile design, and mobile development.** Developing a fully responsive, clickable HTML prototype was instrumental in generating excitement and buy-in for the new intranet. It was easy to show everyone in the organization how the upgraded Conveyor would function relative to the old solution, and users could see how a responsive intranet would make it easier to consume content on the go. It also made usability testing easier, because people were able to use a solution that was almost identical to a production-version intranet, which made the data more accurate when refinements and iterations were created for further review. The team advises: "All organizations looking to build a complex, enterprise-wide intranet with diverse stakeholders and requirements should consider investing in this kind of prototype!"
- **Establish a governance structure in advance.** To ensure the long-term sustainability of Conveyor, Goldcorp established an operational committee to promote ownership across the business. This committee meets quarterly to discuss future enhancements, review analytics, and discuss the intranet roadmap. Participants include stakeholders from IT and Corporate Communications, as well as the portal's executive sponsor and support team. IT and Corporate Communications drive enhancements; they meet weekly to review Conveyor-related requests and suggestions from other Goldcorp areas.
- **Perform a highly managed rollout.** Before launching the upgraded Conveyor, the new solution's cornerstone — the permissions management model — was brought to the old solution. This ensured the organization had an understanding of what type of shift was coming prior to the intranet's go-live date. The team wanted to socialize and educate end users on the change in permissions management outside the intranet upgrade context so it would not be missed in the excitement of having a new employee portal. This decision also gave everyone on the intranet team a head start to manage the change and get employees used to the new methodology before the new architecture and design appeared in the upgraded Conveyor. Ultimately, rolling out the new permissions management model was a major success as the team had buy-in and adoption of this new security approach ahead of the new intranet's launch.

Gendall explains: "We took a big-bang approach to cut-over and go-live because of the business continuity requirements for the dozens of processes relying on Nintex workflows and forms. Over a four-day period, the team worked to bring the new intranet to life. Conveyor was only out of commission for one business day."

Given this effort, the go-live process went on without a hitch and went live on the day that was decided on when the project was initiated.

Support employees were on deck at each location's go-live time (that is, the start of business in each time zone). This elevated support continued for 24 hours. Local leads had resources made available to them to help end users and team members use the upgraded solution.

- **Train.** Training started two months before go-live. A train-the-trainer approach helped manage the number of users who would need training on the upgraded solution. A preproduction environment, which was a full replica of Conveyor's production version, was set up for this purpose. Training was focused on local leads — power users at each location not typically in IT, but adept at technical and nontechnical aspects of Conveyor.

  The trainer traveled with key project sponsors and a change management lead from Goldcorp to two locations in Ontario (Thunder Bay and Timmins) and to Mexico City to conduct training for Canadian and LATAM users, respectively. These sessions covered each level of training (described below) and were crucial to equipping local intranet leads with the tools and confidence they needed to conduct end-user training at mine sites. The team also set up a training portal in the previous intranet to prepare for the imminent go-live.

  Following is a list of role-specific Conveyor training performed prior to go-live:

ROLE-SPECIFIC TRAINING PERFORMED PRIOR TO GO-LIVE	
Conveyor 101	This one-hour training course helps users discover the basics of the new Conveyor and get an introduction to the new design and features. They learn how to set up and customize their *My Goldcorp* profile, and find out where to go for further help and support.
Conveyor for Site Owners	This half-hour course provides an introduction to the Site Owner role and its responsibilities within the new Conveyor. Users learn how to manage requests for access to their department or team site, how to govern content within department or team sites, and how to leverage Conveyor's new capabilities (such as the access management form and the permissions reporting tool).
Conveyor for Site Coordinators	This is the most advanced course offered; it is aimed at employees who do day-to-day management of department and team sites in Conveyor. This four-hour course covers how to request a new department or team site, how to manage content using libraries, lists, metadata, and web parts.
Content Publisher Training	This course for content publishers focuses on publishing in the new Conveyor as well as features available in SharePoint 2013. The course includes guidelines for best practices for content creation and a Goldcorp style guide refresher. The course also covers publishing features new to Conveyor, including rollup and feature images, likes, comments, news categories, keyword tags, dynamic feature rollups, and local news promotion to global news. The course also discusses roles and responsibilities, content authoring and publishing processes, and content guidelines and new requirements.

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Habanero Consulting Group Provides strategy, design, implementation, and support services	• Design, research, and discovery • Development and migration • Testing • Rollout, intranet strategy consulting, coaching, change management, and training • Habanero also built and supported the previous edition of Conveyor (see timeline)

GOVERNANCE

Background

The project was structured as a business initiative with partners across the company's People, Safety, Communications, Legal, and IT departments. Also, a steering committee was formed and periodically briefed the executive leadership team. This helped elevate awareness of the initiative and provide the necessary leadership and sponsorship.

To ensure the long-term sustainability of Conveyor, Goldcorp established an operational joint committee to promote ownership across the business. This committee meets quarterly to discuss future enhancements, review analytics, and discuss the intranet roadmap. Participants include stakeholders from IT and Corporate Communications as well as the portal's executive sponsor and support team. IT and Corporate Communications drive enhancements and meet weekly to review intranet-related requests and suggestions from other organizational areas.

This governance structure is especially important in managing future enhancements. Any user can submit an idea for an enhancement or future feature; this helps the governance team build improvements that are targeted at solving challenges and adding additional value to everyone.

Day-to-Day Support

The Operational Committee has proven to be a critical resource for supporting the day-to-day team and helping it make strategic decisions about Conveyor that will impact the entire organization. "For example," says Kathryn Gendall, Internal Communications Manager, "the day-to-day team recently received requests from mine site leads for administrator-level privileges to be restored. The team presented the committee with several options, and the committee was able to select the best option with the lowest risk. Previously, decisions like these were left to IT or the site to decide without the benefit of executive support and insight."

Enhancements

Prior to this governance approach, requests for improvements were initiated at the mine-site level. This meant that, while individual locations might build great apps, workflows, and additional functionality, those innovations were not easily shared with

the rest of the organization. "It also created a high chance of duplicate development costs because of the lack of oversight," says Gendall.

Enhancements are now centrally reviewed and approved, ensuring that everyone at Goldcorp benefits from intranet improvements. This has reduced the cost and time spent managing improvements from mine to mine and eliminated the risk of duplicate developments. It's an integral part of supporting the intranet's future through a clear governance and ownership approach.

To bring this to life, the team leveraged Nintex workflows within the SharePoint intranet. This lets it collect and manage requests in a simple, standardized way. Nintex also powers many of Conveyor's underlying business processes, including the site request and permissions management functions.

Permissions

Gendall says the new permissions model has gone a long way toward ensuring that the revamped intranet is set up for lasting success. Designated business owners grant requests to access team sites and documents, putting the accountability for security onto the business, as opposed to centralizing security in IT. "While the initial post-launch period was overwhelming, in terms of permissions requests," she says, "there have been no major complaints or issues in this area since that time. Business groups have reported more trust in Conveyor since this enhancement."

Permissions are particularly important for governance because they ensure that the right users can access the right content at the appropriate time.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Executive Sponsor	• Endorse the vision and provide an executive voice • Support and guide the team to make business decisions
Operational Committee	• Own the portal vision and objectives • Prioritize and manage the program • Provide strategic planning and prioritize projects and initiatives • Own the portal roadmap
Communications Oversight	• Provide an operational function (shared with IT) • Oversee branding, content governance, publishing processes, and any communications-related functions
IT Oversight	• Oversee the portal's operational function (in partnership with Communications) • Own collaboration-related portal functions • Oversee other IT roles and responsibilities, service-level objectives, and policies and procedures related to IT management • Oversee the day-to-day Conveyor support team
Local Conveyor Leads	• Promote Conveyor at the site level • Resolve simple queries and conduct introductory training • Filter and coordinate enhancements for their mine site
Systems and Support Analysts	• Address Tier 2 queries and issues about Conveyor, including resolving workflow queries and issues and requests for changes to existing sites (the general IT Helpdesk resolves Tier 1 queries) • Create and design new team sites and workflows • Scope new business processes in Conveyor • Report on permissions and analytics

Conveyor Manager	• Manage support team • Oversee all reporting on Conveyor • Prioritize enhancement requests • Manage Conveyor budget • Drive adoption across Goldcorp
Content Publishers	• Publish news content for *Recent News* and *Local News*
Site Owners	• Act as business owner for the site • Approve or deny permissions • Decide who can and cannot see information

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://conveyor.goldcorp.com
Default Status	The intranet is the homepage on all Goldcorp computers.
Remote Access	Users can access Conveyor offsite through VPN.
Shared Workstations or Kiosks	Some mine employees access Conveyor through workstations or kiosks.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2007	• First company intranet, Conveyor, is born
March 2012	• Upgrade to SharePoint 2010 completed; light redesign
March 2012–Sept 2014	• Ongoing maintenance, support, and evolution of Conveyor, including additional apps, workflows, and enhancements
Sept 2014	• Official 2013 redesign project kick-off
Sept 2014–March 2015	• Research and design phase, including prototype and usability testing • Change management and business readiness assessment begin
April–June 2015	• Implementation: development, migration, video, and workflows
July–November 2015	• Stabilization, UAT, training, content authoring, and change management
November 9th, 2015	• New Conveyor officially live in SharePoint 2013
Overall redesign timeframe: 14 months	

CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Contributors	On Conveyor, content can be divided into two categories: • **Communication content** is generated by three contributors from the Corporate Communications group and by approximately eight communication leads at the sites. • The number of **collaboration content** contributors depends on the group and/or function. These contributors are managed through permissions from site owners, which exist for every department across all of the sites. Departments might each have several content contributors.
Training	• Every site takes a different approach to training. Some sites offer regular training, while others offer training when there are sufficient training requests. At the head office, training for new hires is often conducted during their first few weeks at Goldcorp. • Training is conducted in IT training rooms at some of the sites or via WebEx.
Maintaining Quality	The Information Management Excellence Project launched part way through the redesign project and is focused on creating content management guidelines, best practices, and policies for all Goldcorp content stored on Conveyor. The intranet will be one of three CMSs at the company, along with email and local drives. The plan is to integrate the information management software with Conveyor, then develop processes and guidelines for content management.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Windows Server 2012 • SharePoint Server 2013
Bug Tracking/Quality Assurance	• Team Foundation Server (used for QA during the project) • Microsoft Test Manager • HP Quality Center (used after go-live)
Design Tools	• Sketch for visual design • HTML and CSS for prototype development
Site Building Tools	• Microsoft Visual Studio
Content Management Tools	• SharePoint 2013
Search	• SharePoint 2013
Other Functions	• Qumu (enterprise video) • Nintex (workflows) • Office 365 and Exchange Online (notifications in *My Goldcorp*) • Metalogix Content Matrix (content migration) • WebTrends (intranet analytics) • Single sign-on integration with Enablon, SuccessFactors, and Office 365 Exchange Online (Exchange Online information also appears in the *My Goldcorp* notifications bar)

ROI

Tracking Success with Analytics

SharePoint 2010 offered limited analytics out-of-the-box, so the previous version of Conveyor was unable to determine key metrics. It was also difficult to demonstrate to executives why the intranet was an important communications tool, because no readership statistics were available. This lack of analytics affected the entire communications and collaboration strategy, because it was hard to match enhancements, ideas, and plans to user preferences.

Conveyor now has a robust analytics tool that's built for an enterprise intranet. Executives can measure the return on time spent crafting company-wide intranet communications; stakeholders can review the entire portal's analytics; and end users can look at the number of comments, likes, and views to find the most popular articles. Including analytics has resulted in renewed confidence, interest, and support for Conveyor across all levels and locations within the organization.

Key Metrics

The Goldcorp team has several simple metrics that show initial ROI in the period shortly after going live, from November 2015 to February 2016. These metrics include the following:

- The increase in daily active users showed that 164% more people were connecting to corporate communications each day.
- Page views were up 26% since launch, suggesting that people were reading more content each time they used Conveyor.
- Top news releases were receiving open rates of 60% or more, which equates to more than 3,000 people.
- According to site directory traffic, 300–400 users were collaborating each day.
- The site logged approximately 3,000 unique visits per day — roughly 50% of Goldcorp's office workers.
- Daily average user duration was 44 minutes.

In addition to these measurable successes, the new intranet has achieved many less tangible, but just as important, improvements. The new design has made the system more user friendly, and adding an ownership structure means that Goldcorp now has a dedicated team to support all users in both English and Spanish (the two most common languages). This, coupled with the network of Conveyor leads who drive adoption at mine sites and offices has created increased trust in the system and awareness of what it makes possible.

Communication Improvements

Prior to the upgrade, it was very difficult to measure user engagement with intranet content. The Communications team was producing a lot of content, but had no way to measure which content users responded to or to showcase the large volume of content in a consistent manner. With no analytics, it was also difficult for the Communications team to make fact-based decisions regarding content planning and direction. Most of the feedback the team relied on was subjective and qualitative rather than quantitative. In contrast, the new intranet lets the team measure what's working (or not) and respond appropriately.

Following are some of the ways the team tracks how intranet content is being consumed and what it means for the organization:

- **Requests for enhancements.** Every month, a call with the Conveyor leads lets them share improvements and new enhancements and answer questions. This consistent communication with site representatives has helped the company grow adoption, especially in its LATAM region. Prior to the upgrade, the vast majority of enhancement requests came from Canada. Now 36% of those requests come from LATAM sites.
- **Views, comments, and likes.** Every article Conveyor publishes now shows the number of views, likes, and comments. These features have made a remarkable difference; employees now perceive Conveyor as a communication tool and better engage in what's happening at Goldcorp.
    - **Likes.** The Communications team can easily see which content appeals to users, then use this information to make content more engaging. The like functionality is an easy engagement tool and has become especially popular; one article — a farewell message from long-time CEO Chuck Jeannes — receiving 82 likes within a few hours of posting.
    - **Views.** Users' ability to see how many views an article has earned has massively impacted the perception of Conveyor as a key communication tool. Prior to the upgrade, business units were hesitant to use Conveyor to communicate as they were convinced that no one was reading it.

      The number of views also lets the Communications team analyze which content gains the most views and where additional effort is needed to improve engagement. Goldcorp Communications stakeholders can also determine whether key strategic messages are being read — and, if not, can work with mine general managers to ensure that the messaging is reaching employees through other channels.
- **Requests for publication.** Now that the views are visible to everyone, requests for Conveyor articles have increased, and Conveyor has become a standard line item for all business unit and project communication plans. Executives have also been keen to create and engage with portal content because the article statistics show the response from the rest of the organization. Before these features were implemented, the general sense was that intranet news was important, but it was hard to say exactly how many employees would actually see the content.

Requests to publish articles has not diminished since the launch, and the number of articles published in the first five months of 2016 has grown compared to the same period in 2015, despite a smaller Communications team. The volume of articles published on Conveyor continues to climb. Between January and May 2015, approximately 350 articles were published on the portal; for the same period in 2016, almost 400 stories were shared through this channel. April 2016 was the best month since go-live for readership of Conveyor articles in terms of average views per article, total views, and number of articles published.

- **Language-specific content.** This type of content has also risen. In comparing the January — May 2015 time period with January — May 2016, French-language articles are up from 100 to 125, Spanish articles from 125 to 140, and English articles from approximately 140 to 150, respectively.
- **Demand for content.** In the first half of 2016, approximately 50 more articles were published across the intranet than in the same period in 2015. Further, the number of average views per article topped 300 for the first time in April 2016. Demand for content has been increasing; business units and mine sites now routinely ask Communications for help in creating news articles to push out to the rest of the organization. The ability to quantify views of news articles means that the Communications team can strategically plan content to maximize reach and impact. This insight has already informed Goldcorp's communication strategy.
- **Video.** Video is another key outcome of the new solution, and the team is especially proud of the results they've seen early on.
    - **Quality improvements.** Videos are uploaded at a better quality than the previous solution and can be played full screen.
    - **Increasing reach.** To date, the most-viewed video has been seen 2,813 times in English, 1,893 times in Spanish, and 204 times in French. Based on word of mouth feedback, Goldcorp's Communications team knows that these videos were often played to crews that don't have access to Conveyor, increasing the reach even further than originally expected. This would not have been possible with the previous video solution. A mobile-friendly intranet is especially important on this front, as mine employees with access to Conveyor can share content with other employees via a tablet or smartphone.
- **System performance.** The redesign project has also resulted in improved system performance:
    - **Page load improvement.** Although pages are rich and vibrant, the average page load speed is up to 60% faster than the previous version.

- **Bandwidth increase.** The new Conveyor's connectivity has improved up to 200% over the previous version.
- **More resilient system.** The system is less likely to crash in the event of a server issue.
- **Better load spread.** The system is now smart enough to spread load among servers based on demand; before, Conveyor was hard-coded to one server, resulting in slower performance.

Tracking Success through Feedback

The following feedback was received from various executives and stakeholders:

> "The new Conveyor provides us with the perfect opportunity to improve the way in which we communicate the great work we are doing across the business. I look forward to being able to catch up on what is happening at all of our sites, both quickly and easily." — *Brent Bergeron, Executive Vice President, Corporate Affairs and Sustainability*
>
> "I am looking forward to working on the new and improved Conveyor. I encourage every one of you to use this tool effectively to improve our communication and knowledge sharing within the company." — *George Burns, EVP, Chief Operating Officer*
>
> "I find the new look and feel far more intuitive and much easier to navigate. The redesign makes it far easier to find, access, and share information across the company, which will make Conveyor our key communication and collaboration tool going forward." — *Russell Ball, EVP, Corporate Development & Capital Projects*
>
> "The new Conveyor is all about enhancing our information platform to allow friendly navigation. The upgrade will make our life easier in many ways, including easily storing, finding, and sharing key information; keeping us updated for upcoming activities; managing feedback from regions and operations; getting in contact with key players. It will definitely allow every Goldcorp employee to know how we are continuously improving our organization." — *Nora Lozano, Director Sustainability*
>
> "Safety is fundamental to how we do work at Goldcorp, and the new *Safety* page on Conveyor reflects this. I look forward to having a cleaner and simpler way to share our Safety and Health programs, activities, and tools so that everyone has access and can contribute to Goldcorp being safe enough for our families." — *Ann Masse, VP Safety and Health*
>
> "As a new member of the Musselwhite team, I am excited to be part of the new Conveyor launch. Having only experienced a few weeks in the 'old' Conveyor, I can tell the new system has a lot more user-friendly interface, and I believe it is going to be a powerful tool for team

collaboration." — *Louise Imhoff, Administrative Assistant, Musselwhite Mine*

"I find the new Conveyor is more appealing because of the one-stop *My Goldcorp* workspace, the ability to bring everything I need to one site. Some of the other features I will probably use often is 'change order' on the *Quick Launch* for reordering of the left navigation and the drag features that will allow me to transfer and share documents with a single click." — *Habiba Essak, Graduate Industrial Hygienist, Musselwhite Mine*

"I really like the addition of the *My Notifications* feature on the *My Goldcorp* page. The clean design allows you to see your workflows at a glance. This new feature will make team collaboration and the approval processes more efficient and effective." — *Kevin O' Reilly, Senior Analyst, Toronto Office*

"As a site coordinator, I was thrilled to hear about the Conveyor upgrade. The new intuitive design of the homepage allows the user to navigate the site with ease. One of my favorite features is having the ability to access Conveyor on my smart phone; now I can modify and review items while I am on the go. In addition to this, I can customize the *My Goldcorp* page by adding links to my frequently used documents — now everything is just a click away." — *Mary Bracht, HR Coordinator, Toronto Office*

LESSONS LEARNED

Goldcorp team members discuss lessons learned from the redesign project:

- **Content inventories will simplify content migrations.** "If you're moving thousands of documents, team sites, and other collaboration or publishing content, make sure you have a detailed content inventory that captures the name of the item, its location in the previous intranet, and its destination in the new solution. This, plus other variables unique to your portal and content, will ensure nothing is lost during a migration and everyone on the intranet team understands what's done and what's left to do in this important part of an upgrade project.

  "Detailed content inventories are also critical if you're moving content to a new information architecture, as was done in this project. Ensure your team and business stakeholders understand how the new information architecture and navigation experience will affect end users. This reduces the chance of someone being surprised or unable to find important information during testing or go-live." (Melanie Gabanna)

- **Run QA tests on migrated content.** "It may sound obvious, but once you've run some initial tests of your content migration approach, it is important to run quality assurance tests and user acceptance tests of the new migrated content. To the migration team, it may look like everything moved across properly, but with a more rigorous testing approach with content owners, you may find that lists are missing, web parts weren't migrated, etc." (Toni Albert)
- **Migration tools are not a silver bullet.** "It's important to remember that migration tools are not a silver bullet. From the tools we used and looked at during the engagement, we realized each SharePoint migration tool has strengths and weaknesses. Custom scripts are necessary in certain cases, so be prepared to step in and do this work when a tool cannot perform to your specifications or needs." (Chris Radcliffe)
- **Invest in training.** "Our investment in training materials, courses, and overall structure was key to the success of this upgrade. The local lead model created a key link between the intranet project team and end users. A train-the-trainer approach with local leads and other key users prior to go-live meant that each location had a representative who was ready to train colleagues on the upgraded intranet. Goldcorp and Habanero also created courses that are reusable for each part of the intranet, depending on a user's role (site owner, content publisher, etc.). The Conveyor 101 course created during this intranet project continues to be a vital tool when onboarding new employees or giving users a refresher course." (Mumtaz Chaudhary)
- **Establish ownership and governance.** "A key feature of Conveyor's increased reach and adoption in 2016 has been as a result of a clear governance structure that identifies ownership for the platform. Both IT and Corporate Communications are aware of their roles to support and grow Conveyor and so are held accountable at the Operational Committee meetings to report on the adoption of the intranet. Ensuring an intranet has key executive and operational support after go-live is key to growing adoption and usage of the solution, as has been the case in our organization." (Damon Sas)
- **An intranet is the heart of your digital workplace.** "Intranets should be home base for all of the tools employees need throughout their day. You have to look at the landscape and see how you can integrate, fully or lightly, with the rest of the applications or web services users need. Without this broad view and understanding of how your intranet fits into the rest of your digital workplace, you're potentially furthering confusion or silos in your organization." (Damon Sas)

  "In *My Goldcorp*, we created this sort of hub for the other digital tools employees use every day. With the right coaching around what tool to use when, and how to make sense of the integration points, we're able to encourage people to spend most of their intranet time within the personalized hub." (Jose Szücs)

- **Consider your homepage experience.** "A lot of intranet homepages resemble the walled-garden approach that was popular in consumer-facing web applications in 1990s and early 2000s. Think about how you can modernize that experience for users and bring more of an external-facing feel to your intranet. At Goldcorp, we decided to focus on news and rich media — including photos and video — to create an intranet homepage that tells our organization's story as opposed to acting like a sitemap for the entire intranet. The key to executing this is organizing content authors and a pipeline of content that supports a news-first homepage, but with the right team approach this is doable and provides a ton of value for everyone in the organization." (Ben Ng)
- **Build a flexible navigation.** "As we moved from a distributed, 13-portal structure to one global intranet, the navigation was a major focus for the team. We chose five general buckets with the ability to drill down to related content, and eliminated fly out menus that often distract from page content and create a more dated experience. Content targeting can ensure people aren't overwhelmed by landing pages, plus coaching users to use search or personalized bookmarks, like on the *My Goldcorp* page, to save frequently used content." (Ben Ng)
- **Get your team aligned as early as possible.** "One of the key decisions before, during, and after the project was the time spent getting stakeholders across Goldcorp aligned around the intranet. Conveyor was seen as a global foundation for communications and collaboration, and having this understanding made it easier to address concerns, make decisions, and build toward a cohesive vision." (Mumtaz Chaudhary)
- **Test early and often.** "Get users in front of the solution as early and often as you can. When you're making a big change to the way an intranet looks and functions, you have to show people how the shift will benefit them and improve the way they use the solution. We did this with the navigation, showing how localization and a more streamlined experience makes it easier to find what you're looking for — as opposed to remembering complex paths and sifting through massive fly-out menus." (Melanie Gabanna)

Goodwill Industries International, Inc.

OVERVIEW

COMPANY

Goodwill® is a social enterprise with a proven commitment to a triple bottom line: each year, its $5 billion USD donated goods retail infrastructure funds career services for 37 million people (two million in person and 35 million virtually) and results in positive social and environmental outcomes for the global community.

Headquarters: Rockville, Maryland. Goodwill Industries International (GII) is composed of independent member organizations; the Rockville office provides services and benefits that help advance the GII mission and businesses.

Company locations: Goodwill has 164 independent, community-based organizations across the US and Canada, and has a presence in 13 other countries.

Locations where people use the intranet: Employees at Goodwill organizations in the US, Canada, South Korea, Finland, and Brazil use the intranet. The Goodwill enterprise is geographically diverse, having a presence in all 50 states and four Canadian provinces. Goodwill organizations also vary in territory size, number of staff, services, and available resources.

Annual revenue: Sales revenue was approximately $4.1 billion and total revenue was $5.5 billion in 2015 (USD).

THE INTRANET

Users: Approximately 9,500 Goodwill employees are registered users, primarily at the management and executive levels. These employees use the site to access and share resources, best practices, templates, and learning opportunities, as well as to find directory information about locations and employees. The intranet holds special value for small- to medium-sized Goodwills that rely on the site's tools and templates to supplement what they can achieve with local resources.

Mobile approach: Mobile accessible

Technology platform: SharePoint 2010

TEAM

The team: A team of approximately 14 people contributed to the site's design and development, including front-end, IA and graphic design, back-end development and architecture, business taxonomy, and content.

Leadership: Arlene McCrehan, Senior Director of Digital Media; Jerry Callistein, Director of Information Systems; Beth Perell, VP of Communications and Information Management; David Downes, VP Information Technology

Design (Creative Services): Arlene McCrehan, GII Senior Director of Online Media; Rachel Mundstock, Project Manager, Threespot; Meryl Pritchard, Graphic Design, Threespot; Gordon Withers, Lead Front-End Development, Threespot

Development: Chirag Patel, GII Senior Developer; Jerry Callistein, GII IT Systems Director; Sam Torian and Will Thomas, Protiviti

Taxonomy: Jenni Baker, GII Online Content Program Manager; Mark Leher, COO, WAND, Inc.; Mike Doane, Senior Consultant, WAND, Inc.

Content and Communities: Maggie Swearingen and John Elam, Protiviti; Jenni Baker, GII Online Content Program Manager

INTRANET TEAM



Team members shown here (back row, left to right): Joe Shaw, Ben Herring, Sarah Newhard, Teresa Weller, Arlene McCrehan, Jenni Baker, and Chirag Patel. (front row, left to right): Beth Perell and Jerry Callistein.

HIGHLIGHTS ABOUT THIS WINNER

Starting from an original site made up of 130 communities and a user-generated taxonomy that had expanded to include 13,000 terms (complete with typographical errors and redundancies), the 14-person Goodwill intranet team set out to create a user-focused site that made information easy to find.

The team worked to streamline site content, create a new taxonomy, improve search, and build a governance structure to support the 9,500 users of the intranet, which is used to help bridge geographic and organizational differences throughout the network. The site communicates both from the enterprise to individual Goodwill locations — which vary widely in size, location, and number of staff — and from employee to employee across the diverse locations.

- **New taxonomy.** Goodwill's previous site content was tagged with 13,000 terms, some of which were spelled incorrectly or duplicated. The team started from scratch, creating a taxonomy of more than 1,000 terms, customized to the organization's vocabulary. The team trained more than 50 team members on how to apply the new terms to content and made content easier to find via navigation as well as search.

- **Emphasis on search.** In conducting user research, the team heard the common complaint that information was simply too hard to locate. In response, team members worked to improve the efficiency and effectiveness of the search tool. They also decided to put the search tool front and center in the new design, encouraging users to try it as an improved way to find information. The placement reflects the team's confidence in the improvements it made to search.
- **Author support.** Site owners and managers create content throughout the site. The intranet team supports the authors with guides for writing and for selecting photos, and through regularly scheduled training opportunities. A monthly brown bag series included training and a facilitated discussion on writing ideas, creating editorial calendars, and promoting content. Further, the team emphasizes that posting content shouldn't be seen as a job task, but as an opportunity to hone writing skills and to position the author as an SME within Goodwill.
- **Governance.** Previously, intranet governance was not well defined. The redesign was an opportunity for cross-team collaboration, starting with a core team from IT and Digital and Knowledge Management. The team's next challenge is to create a living governance document to use moving forward for maintenance and future planning.
- **SharePoint.** With the exception of one member, the team was unfamiliar with the nuances of SharePoint terminology at the start of the project. A miscommunication with a vendor resulted in a delay, and necessitated switching vendors to finish the project. Many of the team members were learning SharePoint while they were building out sites.

BACKGROUND

Goodwill Industries International (GII) is the member services office for the Goodwill enterprise and offers local Goodwills various benefits to enhance their programs and services and grow their organizations. Goodwill's corporate intranet, MyGoodwill, is one of these benefits.

The Goodwill enterprise is geographically diverse, with a presence in all 50 states and four Canadian provinces. Goodwill's 164 organizations also vary in territory size, number of staff, services, and available resources. MyGoodwill plays an important role in bridging these geographic and organizational differences, establishing an online destination for Goodwill staff members to convene, share best practices, and request input from their peers at other Goodwill locations. The intranet holds special value for small-to-medium-sized Goodwills, which rely on the site's tools and templates to supplement what they can achieve with local resources.

MyGoodwill supports users working in multiple organizational areas. Disciplines with the highest percentage of staff members represented include workforce development (35%), donated goods and retail (22%), administration (11%), HR (9%), finance (7%), and marketing and communications (5%). Users at multiple career levels

access MyGoodwill; groups with the highest representation include managers (33%), specialists (25%), and directors (18%).

The existing MyGoodwill, which was built on the open-source Alfresco CMS, was six years old when the new site launched. Two years after the initial site's launch, leadership made a commitment to move all of the organization's systems to Microsoft platforms to consolidate staff expertise and strengthen overall security. During the transition, member organizations voiced dissatisfaction with the old site.

The site had grown popular, and with that popularity came lots of participation. This might seem like a good problem to have, but the organization paid a price for that growth. The number of communities had grown to nearly 130, making navigation a challenge for users. Because the intranet team let users create tags, the folksonomy had grown to more than 13,000 terms, replete with typos and redundancies. Content and documents were outdated. Search was bogged down, and search results were difficult for users to parse.

With all of this in mind, the redesign team's primary goal was to improve search and navigation, and create a more contemporary look and feel that would help the organization re-engage its users.

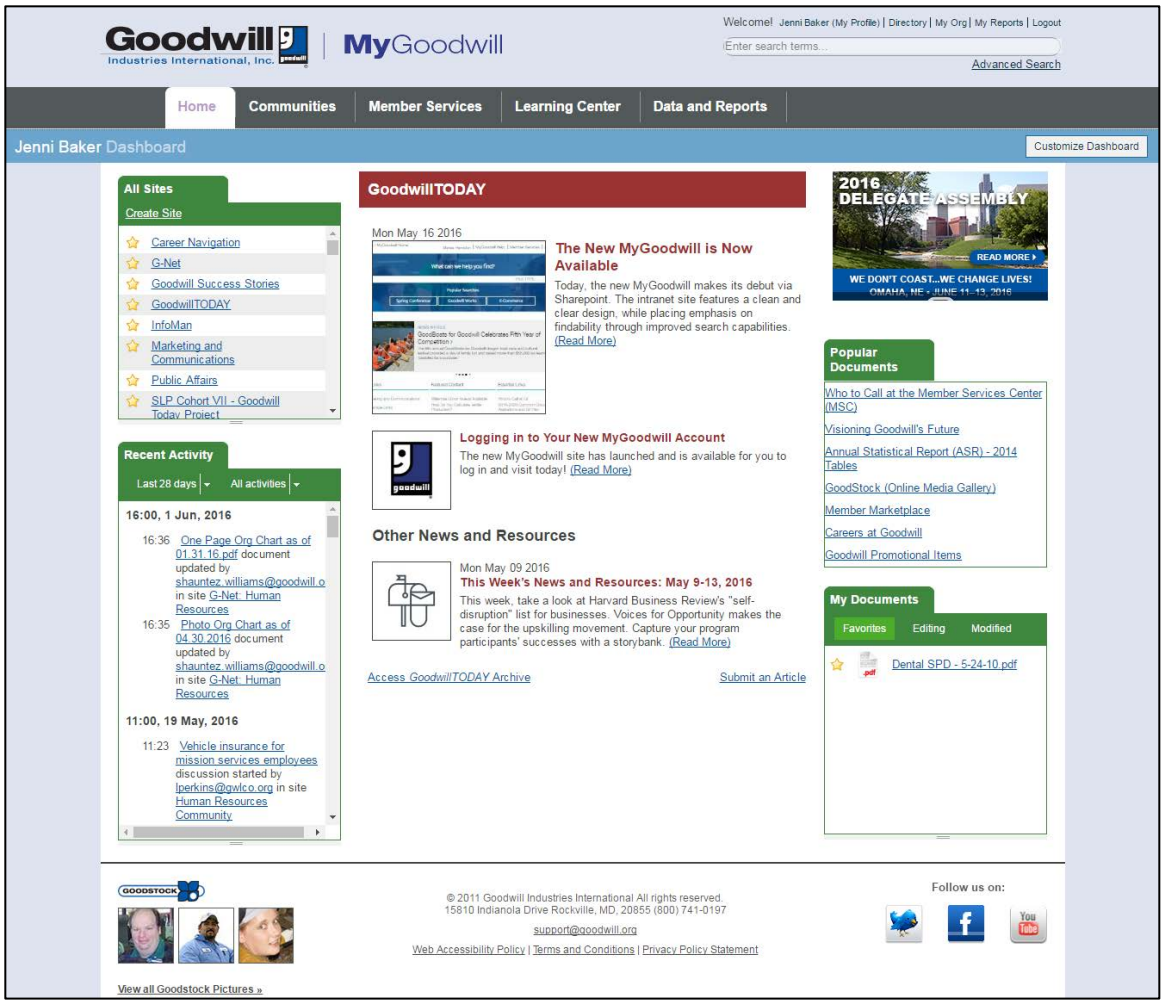


Image 56. Goodwill Intranet Old Homepage. *Goodwill_01_home_v1.png*

Challenges

Arlene McCrehan, Senior Director of Digital Media, outlines some of the major challenges the team faced during this project:

- **Learning SharePoint on the fly.** "One of our significant challenges is that most of us had to learn SharePoint as we were planning and building it. At the time we decided to move to SharePoint, our Rockville team began learning the technology and working in the out-of-the-box team sites that were set up. Trainings were held; however, teams were slow to adopt without a compelling rationale. The more robust features of SharePoint weren't leveraged with these sites, however, and our team leaned heavily on our one in-house SharePoint expert to educate and lead us through the strategic uses of these features for our new MyGoodwill site. As we brought vendors into this redesign process, our Power User knowledge base was further strengthened."

- **Managing cross-team collaboration.** "Our governance structure was not solidified with our previous site, so cross-team collaboration needed to be strengthened at the outset. We established a core governance team, consisting of leads from IT and Digital and Knowledge Management, and laid out a framework for decision-making and Agile development through JIRA. We hold weekly governance and monthly sprint planning meetings, and we have resolved many of our collaboration difficulties. However, we have yet to create a living governance document that can serve as a reference going forward. This will be a goal for the remainder of 2016."
- **Creating clear scope of work boundaries when engaging outside resources.** "The nuances of SharePoint-specific terminology in the process of outlining our statement of work for the design vendor led to another challenge during the project. We had understood that our design vendor would deliver files that we could immediately implement on our site — that is, in SharePoint format. However, our vendor's understanding was that they would not be doing the implementation and were not responsible for the SharePoint formatting. We quickly turned to another vendor we were working with on the site's infrastructure to format the files and implement them on the site; however, we lost three months as a result."

Taking a Customers-First Approach

As mentioned above, users expressed frustration with the existing site, which was clogged with outdated content and deep navigation. GII staff members frequently received calls and emails requesting documents that users could not find on the site. The site had also earned a less than stellar reputation among member organization CEOs and executives; although they comprise a small percentage of users, they are very influential regarding intranet use.

Because GII considers the intranet a service it offers member organizations, it adopted an intense, customer-first mindset in approaching the site redesign. One of the first steps was to use Google Analytics to examine the current usage patterns. GII's redesign team wanted to discover which new features users might want on the new platform, as well as which features might help them do their work. The team therefore conducted a survey across the entire user base, segmenting audiences by areas of professional expertise and organizational levels. Survey respondents were also asked if they would like to continue contributing to the redesign by participating in focus groups. During the design process, the team held focus group sessions with these volunteers, as well as with CEOs of member Goodwills who had expressed interest.

DESIGN REVIEW

Homepage

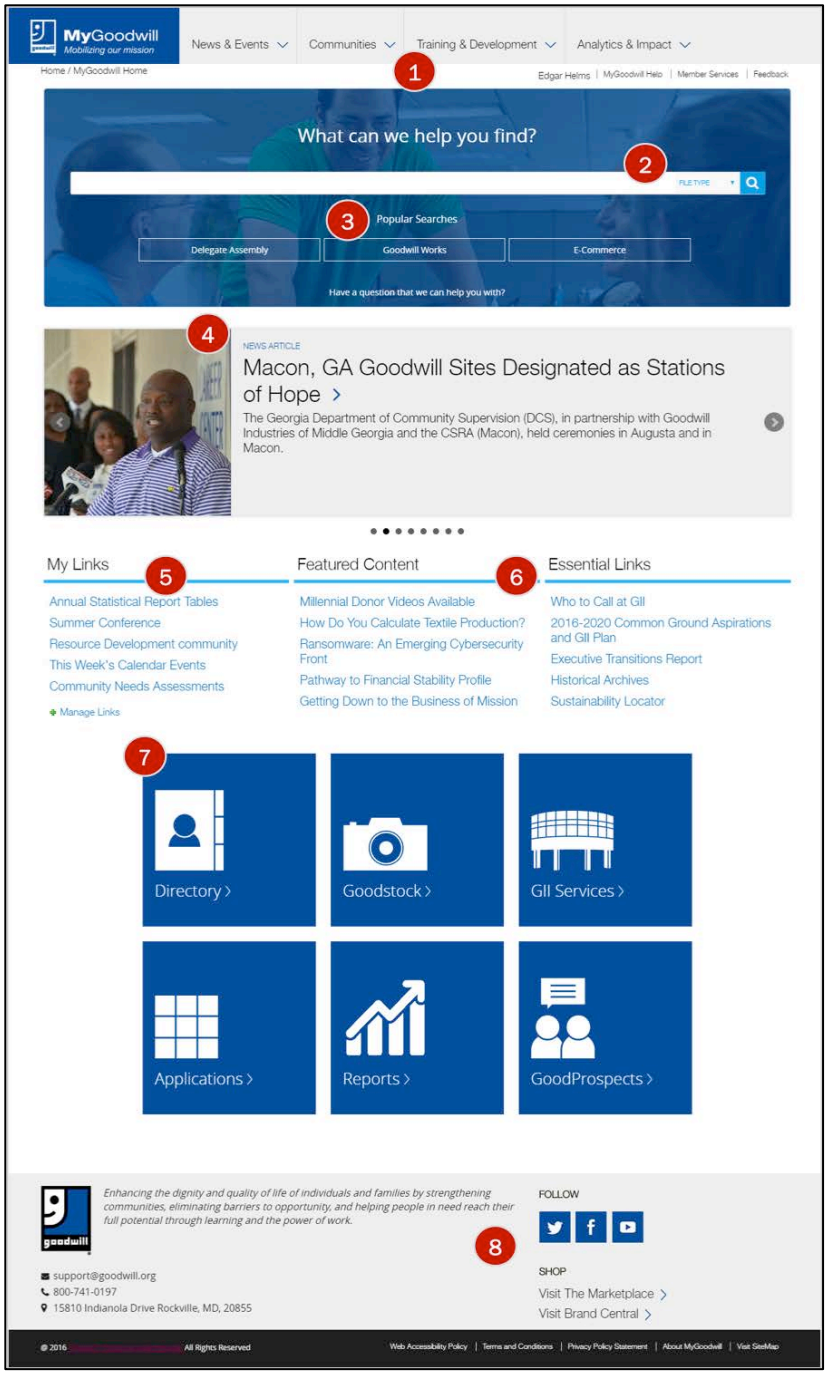


Image 57. Goodwill Intranet New Homepage. *Goodwill_02_home_live.png*

Homepage Highlights

1. **Navigation.** The site's global navigation includes four categories: *News & Events*, *Communities*, *Training & Development*, and *Analytics & Impact*. The team put the navigational categories through user testing to ensure that they reflected how employees thought about content. Of the four initial categories put through click testing, the team found two did not match users' mental model of the content. The team then renamed one category and replaced another to arrive at the final design's four categories.
2. **Search.** The team decided to put search front and center in the design. The top of the homepage is focused on search, with the large heading *What can we help you find?* This is followed by an open text field for user queries; the field is wide enough to accommodate even the longest of search terms. Users can select a file type (document, presentation, image, or audio/video) or bypass that filter and move straight to submitting their query via the magnifying glass icon.
3. **Popular searches.** To give users even faster access to what they need to find, the team lists three popular searches beneath the main search box. This list of popular searches is based in part on analytics, but it is also used to proactively promote content to users. For instance, the team uses this area to provide quick access to information that's important at different times of the year. For example, in June, July, and August, the team will add a link to "summer conference" to the list of popular searches as they know users are often looking for that information at that time.
4. **Carousel.** A news carousel features several pieces of content. Users can navigate the carousel via arrows on either side of the content area or use the dots below the carousel. The carousel automatically rotates; the team slowed the rotation speed based on user feedback in early testing. News items are updated three to five times a week and focus on information of interest to the Goodwill enterprise.
5. ***My Links*.** Users can create a list of links to content of interest. The *My Links* title makes the section's purpose clear, while the *Manage Links* link makes it easy for users to understand that they can change those links.
6. ***Featured Content* and *Essential Links*.** *Featured Content* surfaces additional valuable resources for users, while *Essential Links* gives users access to information that the organization sees as a priority, including contact information, organizational planning, sustainability, and history information.
7. **Blue tiles.** Throughout the site, blue tiles highlight important content. On the homepage, these tiles link to the employee *Directory*, *Goodstock* (Goodwill's proprietary stock photography website with images from national and international Goodwill locations), *GII Services*, *Applications*, *Reports*, and *GoodProspects*® (a public site for career navigators). When users hover over the tiles, the icons slide up to display a short description of the destination link. Throughout the site, blue tiles give users quick access to key applications and content in areas where the site structure is deep.

8. **Footer.** The page footer provides contact information and links to Goodwill's presence on Twitter, Facebook, and YouTube, as well as links to *Visit The Marketplace* and *Visit Brand Central* (sites for Goodwill vendor listings and branded merchandise, respectively).

Communities

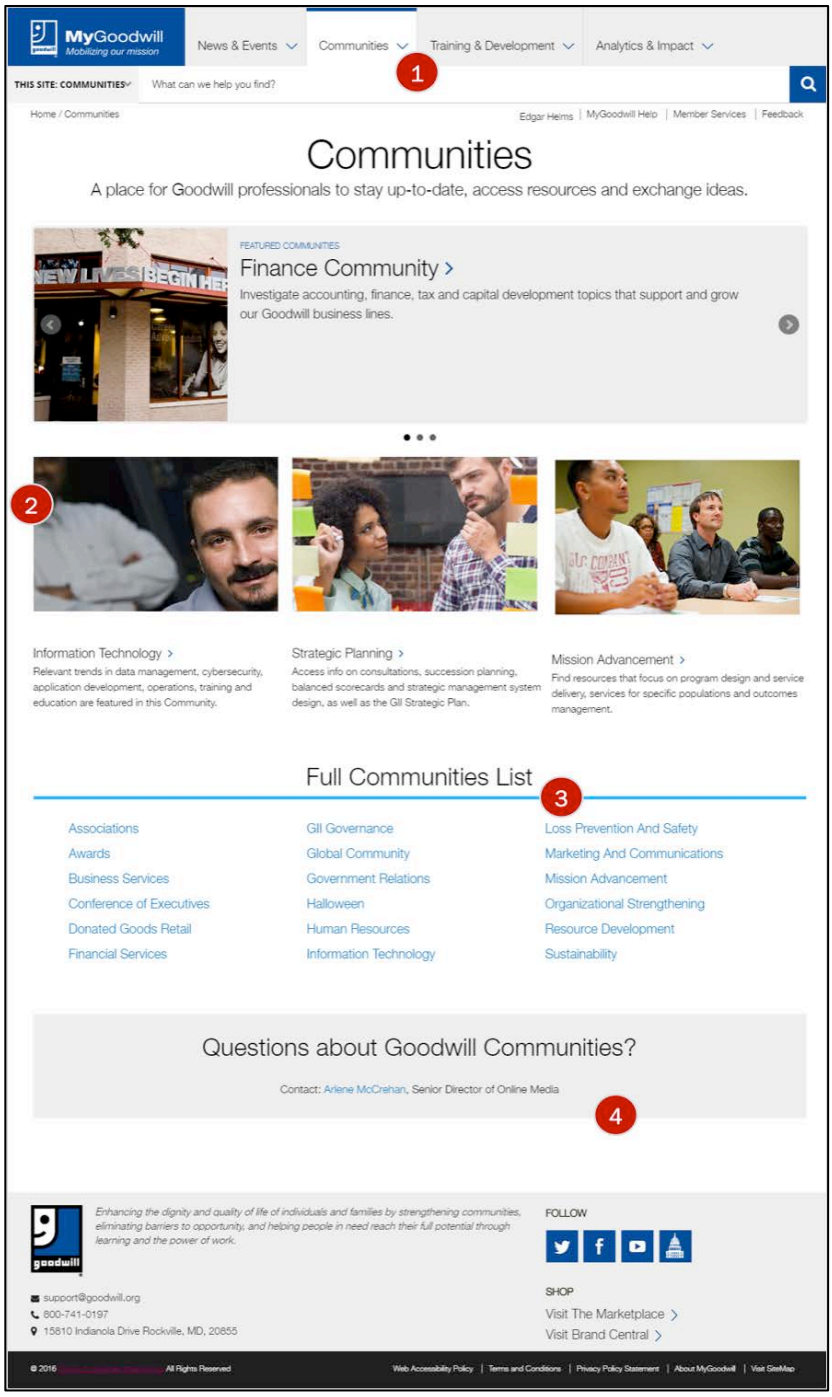


Image 58. Goodwill Intranet Communities Landing Page.
Goodwill_03_communities_live.png

Communities Highlights

1. **Look and feel.** Throughout the site, pages make good use of white space and imagery. One of the goals of the redesign was to have a modern look and feel to help engage users. The previous design was dense with links and text; the new design is a welcome change.
2. **Photography.** The team provides content owners with guidelines specific to selecting photographs. Goodwill has the benefit of having a proprietary stock photography website filled with meaningful images from Goodwill locations and this results in the site being filled with meaningful images of real Goodwill employees, volunteers, and people served by the organization. The availability of these photographs helps reflect the organization's people-centered approach.
3. **Organization.** The previous intranet included 130 communities, which appeared in an alphabetical list with no nesting or hierarchy. The new site has pared down the communities to 25 and groups them by discipline. Users can browse featured communities at the top of the *Communities* landing page or navigate via community type via a list at the bottom of the page.
4. **Contact information.** Anyone with questions about communities is invited to contact the individual listed.

Search

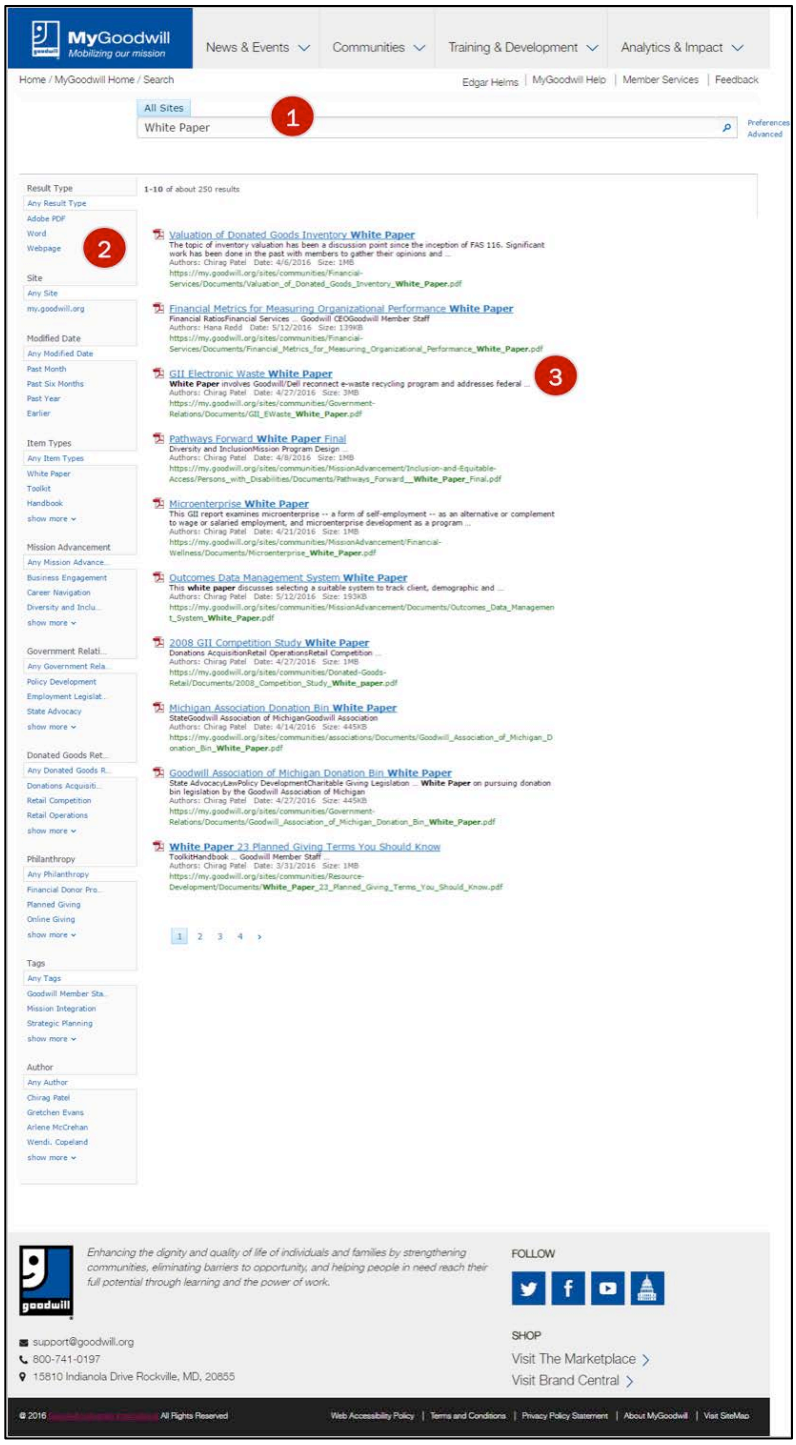


Image 59, Goodwill Intranet Search Results Page.
Goodwill_04_search_results.png

Search Highlights

1. **Query.** The user's search query is repeated at the top of the results page, making it easy to see the term and edit it if needed.
2. **Facets.** The side of the page lets users narrow their options by result type, site, modified date, and item type. Further, users can choose specific tags from the site's taxonomy, limiting results to only content tagged with those terms. Each piece of content on the site requires at least two tags — one item type and one universal term.
3. **Results.** Search results include a document-type icon, the result title, and a brief blurb that includes the content authors, date posted, and file size, as appropriate. The team set a goal of no more than three refinements before the user could easily select the needed resource from the narrowed set. The content staff is carefully trained on the new site taxonomy to help surface the right results for a given query. Tags also impact how content is displayed on the site, giving content owners a strong incentive to apply tags accurately.

Content Page

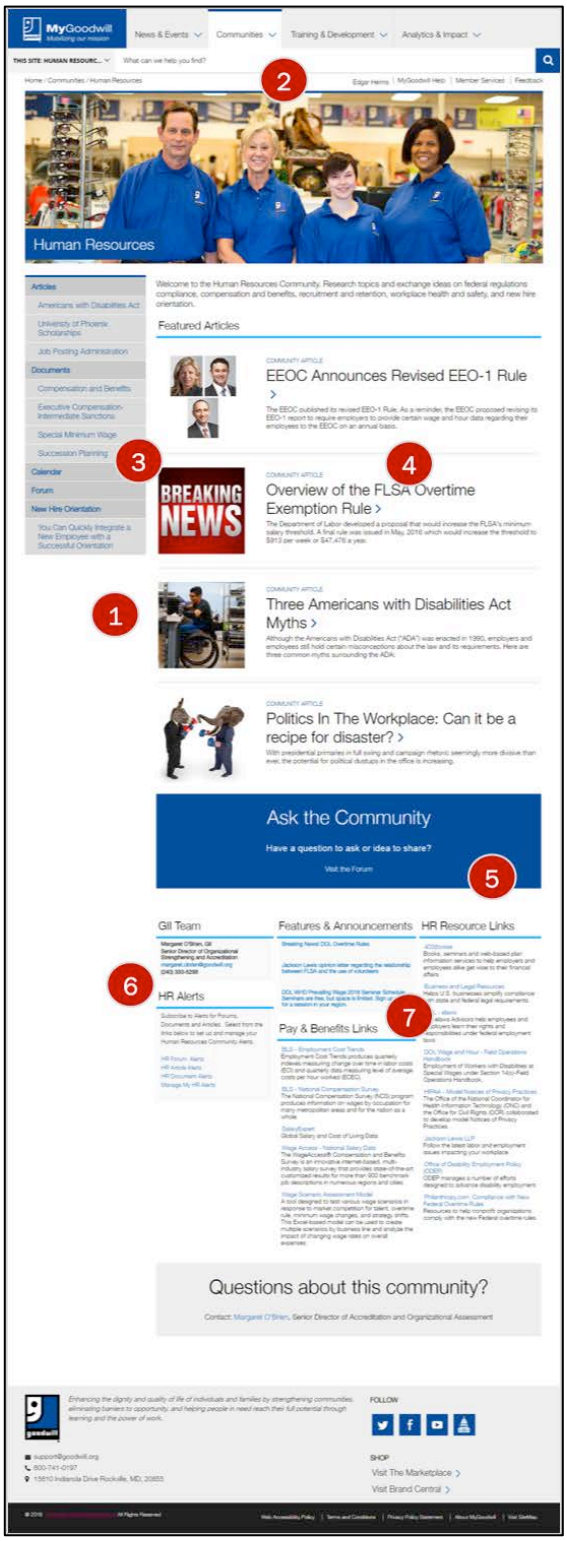


Image 60. Goodwill Intranet Community Page. Example of a Goodwill intranet community that uses a page template layout. *Goodwill_05_page_layout_example_1.png*

Content Page Highlights

1. **Templated layouts.** The site uses templates to ensure consistency on content pages. Content owners can select from a few variations, such as moving images to the left or the right.
2. **Consistent search.** Search is emphasized on the homepage, but is also available throughout the site. On interior pages, search moves to the top of the page, beneath the main site navigation.
3. **Quickstart menus.** The left side of content pages includes quickstart menus, which give easy access to deeper information.
4. **Articles.** Each article is accompanied by an image, and the headline is followed by a brief blurb of content. The site includes commenting and rating features for all articles.
5. ***Ask the Community*.** Forums allow employees across local Goodwill locations to connect with one another and share ideas. Forums are also used to extend conversations from in-person meetings, such as at conferences and learning labs. The forums take the place of the listservs — which were previously used for such discussions — and help ensure that knowledge and best practices are captured so users can find information they need without having to ask again.
6. **Contact and alerts.** The bottom of the page includes contact information, as well as a way to sign up to receive alerts when new content is posted to a community. This helps keep users informed about the latest changes.
7. **Links and announcements.** The bottom of the page also includes important announcements and highlighted links to key content areas, such as newly released regulations and guidelines, external resources, and cross-references to relevant content in other communities.

DESIGN PROCESS AND USABILITY WORK

Site Usage Analysis

The design team approached its research and design activities from several angles. The first was site usage. GII conducted a critical analysis of site usage based on current year statistics from Google Analytics and information about users from the company's internal CRM database. Specifically, the team analyzed the following areas to inform its design decisions:

- **User career levels.** This analysis confirmed that the primary users were mid-career individuals who worked out of an office, rather than in a retail store or donation center.
- **User primary career area.** Team members wanted to understand the makeup of core users so they could prominently feature content accordingly. The analysis confirmed that more than half of the users work in retail and workforce development areas.
- **Page views by content and topic areas:** Using Google Analytics, the team segmented page views by content and topic areas to understand what was most valuable to users. "Learning" and "data and reports" surfaced as the top areas.

User Survey Results

With knowledge of user behavior in hand, team members designed a survey to confirm their understanding of user preferences and to see how people responded to additional opportunities for possible features, including for the corporate intranet. Nearly 400 local Goodwill staff members responded to the survey (the questions and response rankings appear below).

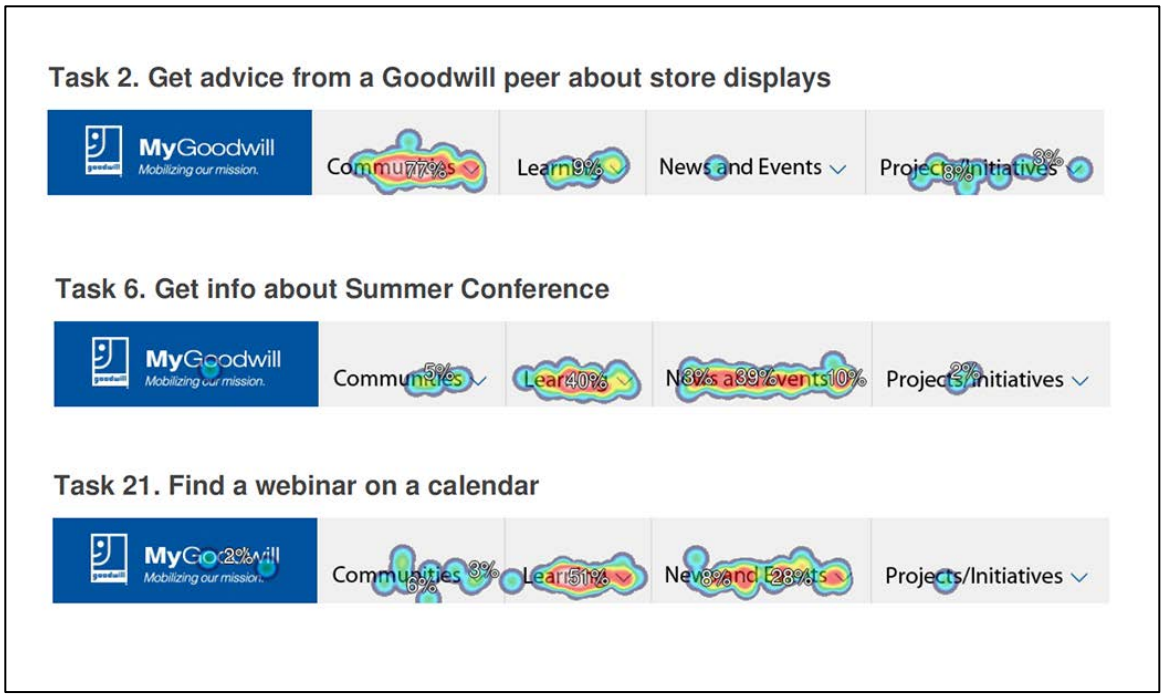
The survey segmented respondents according to their professional areas to provide weight to the team's design decisions, as the goal was to satisfy the largest body of users. One surprising finding was how tepid users were to the suggestion of a Facebook-style social feature. This shouldn't have been a big surprise; a 2014 capstone project survey of Goodwill employees conducted by Goodwill's Senior Leader program revealed that time constraints were a leading inhibitor for employee participation on MyGoodwill. However, given the popularity of social tools, it was still an unexpected finding. Users who responded to the survey indicated that they wanted to find resources quickly, and then get back to their jobs.

Respondents indicated that they expected the intranet to provide easy access to the specific content they're looking for: tools and templates to help them do their job, data and research, and learning and professional development opportunities. Users also ranked their top tasks on the site, with the top 10 tasks breaking down as follows:

TOP INTRANET TASKS **Identified Through User Survey Results**	
Ranking	**Task**
1	Search for content on a specific topic
2	Access a specific document
3	Access links to resources in my professional area
4	Find contact info
5	Access templates that help me do my job
6	Access toolkits that help me do my job
7	Find a best practice or case study on a particular topic
8	Register for a training/professional development opportunity
9	Participate in or access a webinar
10	Ask an experienced person a question on a specific topic

This list of tasks helped inform the initial top-level navigation elements that the team would later test against user expectations. In January 2016, the design team conducted first-click testing with approximately 100 users to test a proposed top-level navigation and corresponding IA for the new intranet. Chalkmark, a tool offered by Optimal Workshop, was used as the testing tool.

The tool presented users with the four menu items originally proposed for the top-level navigation, along with a series of 30 tasks. Users were asked to click on the menu item they would choose first to complete each task. This research revealed that two of the proposed navigation items did not match users' mental models, leading one to be renamed and another to be replaced altogether.



Three different Goodwill intranet heat maps produced by conducting first-click testing on the proposed navigation for the new Goodwill intranet. The design team used Optimal Workshop's Chalkmark tool to generate these heat maps. The colored areas highlight the density and frequency of clicks for each navigation item.

Other Research Methods

To inform its remaining design decisions, the team relied on other research:

- **NN/g Intranet Design Annual.** GII team members purchased NN/g's Intranet Design Annual 2014 and reviewed comparable organizations and the technology, methods, and vendors they used. The team ultimately selected one of the vendors used by a 2014 Design Annual winner.
- **Search best practices.** A 2015 J. Boye conference presentation on search best practices, "Empowering Search to Drive Intranet Adoption," provided ideas for improving search options for users.
- **Online focus groups.** Along with its agency partner Threespot, the team conducted online focus groups so that users could respond to and provide input on the initial designs. Participants generally responded positively to the new designs, but were somewhat confused by an "Explore" page design, which was intended to specifically address findability issues from the past. Users didn't understand how the page was unique from an advanced search. Given these findings, the team ultimately chose not to implement the "Explore" page design.

- **IA labeling exercise.** While the company's developers were implementing the SharePoint templates, the design team conducted an exercise to refine the labels for the main navigation using Optimal Sort's Chalkmark. The team found this exercise particularly helpful for understanding how users interpreted "Learning" as a navigation element. This term had become a catchall for many types of training resources, so they applied the results of this exercise to relabel the tab and distinguish between formal and structured learning resources, and resources such as toolkits and webinars.
- **Alpha testing.** Three new MyGoodwill communities were alpha-tested for two weeks in April 2016. Five individuals from the original survey who had volunteered to support site rollout — and whose primary career areas involved the alpha communities — were invited to use and explore the site, accomplish a specific list of tasks, and provide feedback via a spreadsheet. An introductory webinar was held to provide basic training and instructions.

  Several issues were resolved through the alpha testing process. The test results helped the team decide to increase the font size and change it from dark gray to black; create messaging and training specific to accommodating browser discrepancies when opening documents; and reduce the speed of the homepage carousel.
- **Beta testing.** The entire site was beta tested for three weeks in spring 2016. All employees whose primary career area involved the three alpha communities were invited to use the site and perform tasks. For those who preferred to offer less-structured feedback, the team created a feedback form. Overall, responses were positive, and indicated that the modifications made as a result of the alpha test resulted in fewer issues.

IA Redesign

Since its initial launch in 2011, the old MyGoodwill intranet had ballooned to a collection of 130 sites or communities. These were listed alphabetically in a permanent widget on the left side of the homepage, with no nesting or hierarchies to show relationships between similar sites. As another access point, the existing top-level navigation sorted 42 of the more prominent sites into two menus — *Communities* and *Member Services* — but the distinction between their purpose and execution was not clear to GII team members or users.

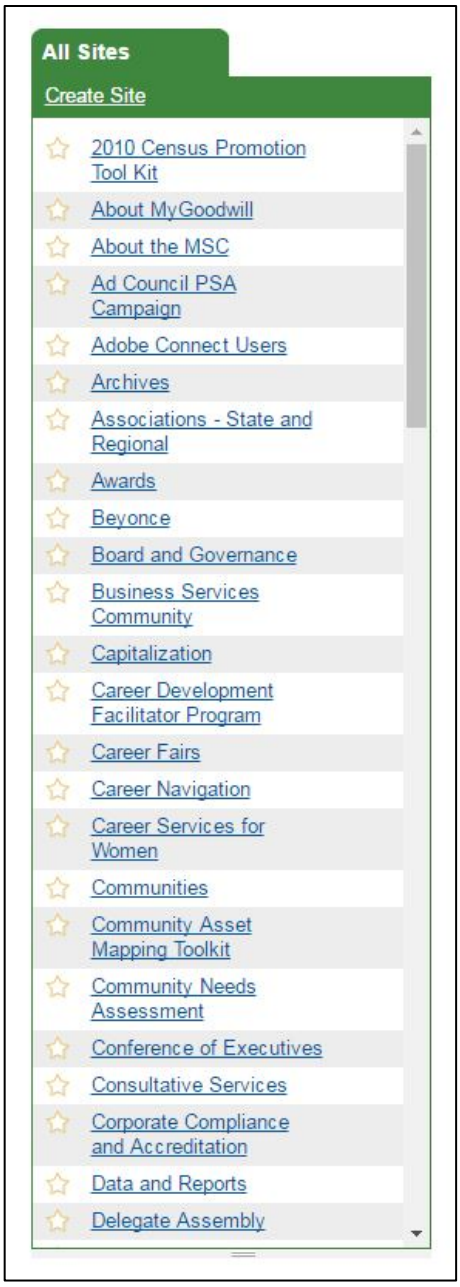


Image 61. Goodwill Intranet All Sites Widget. This shows the *All Sites* widget that appeared in the left column of the old site. Users had to scroll down to view all 130 available sites.
Goodwill_06_all_sites_widget_v1.png

With the redesign, the team pared down the number of main communities to approximately 25, working with GII staff members to delete and consolidate content from existing sites. The remaining sites were grouped by discipline and organized hierarchically. For example, GII created a parent community for Goodwill's *Mission Advancement* work, with child sites underneath it for *Career Navigation*, *Financial Wellness*, *Inclusion & Equitable Access*, and other focus areas. Site owners reviewed and validated the new IA before the build.

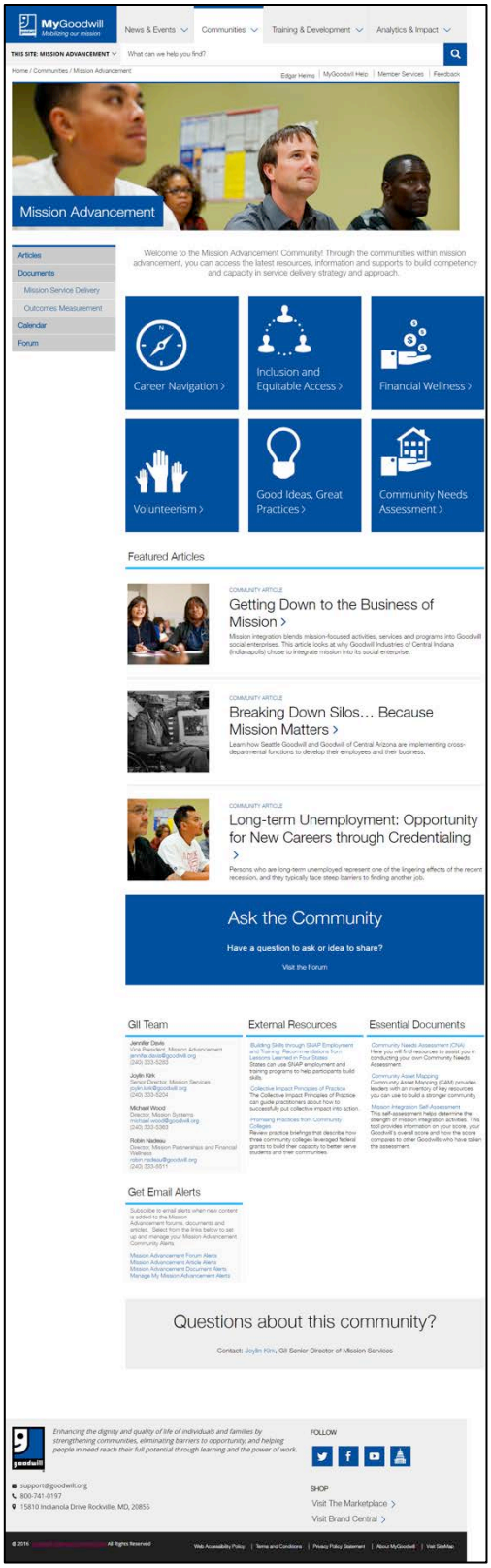


Image 62. Goodwill Intranet Mission Advancement Community.
Goodwill_07_mission_advancement_community.png

Believing that searching for site content was faster than browsing it, the team sought to solve site structure and organization problems through a search-first homepage.

Designing Menus

When developing the new MyGoodwill intranet, GII originally deployed two types of menus: a top-level navigation menu, and quickstart menus on the left side of each site. For large parent sites, however, the quickstart menu quickly became overburdened with items. To solve this problem, GII developed a tertiary tile-based navigation system displayed in the site's main content area to help surface key information without taxing the quickstart menus.

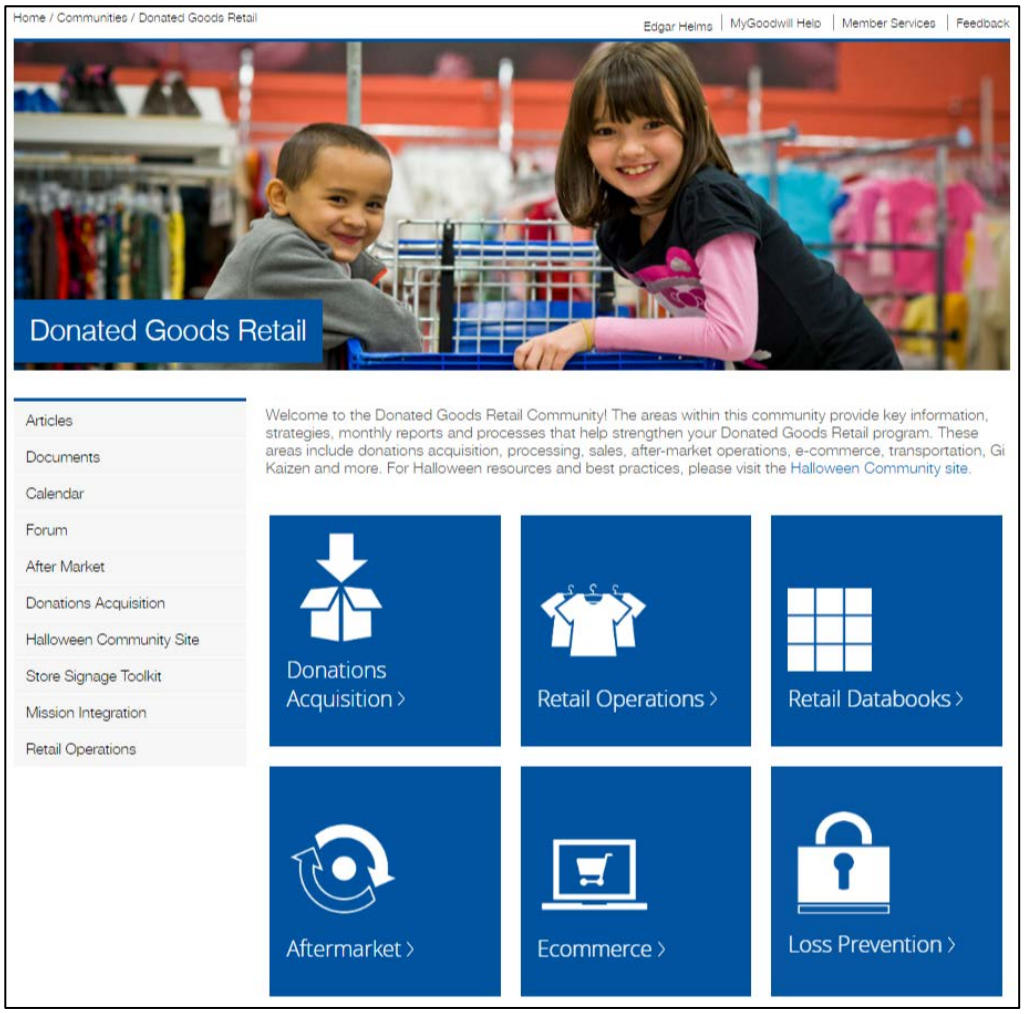
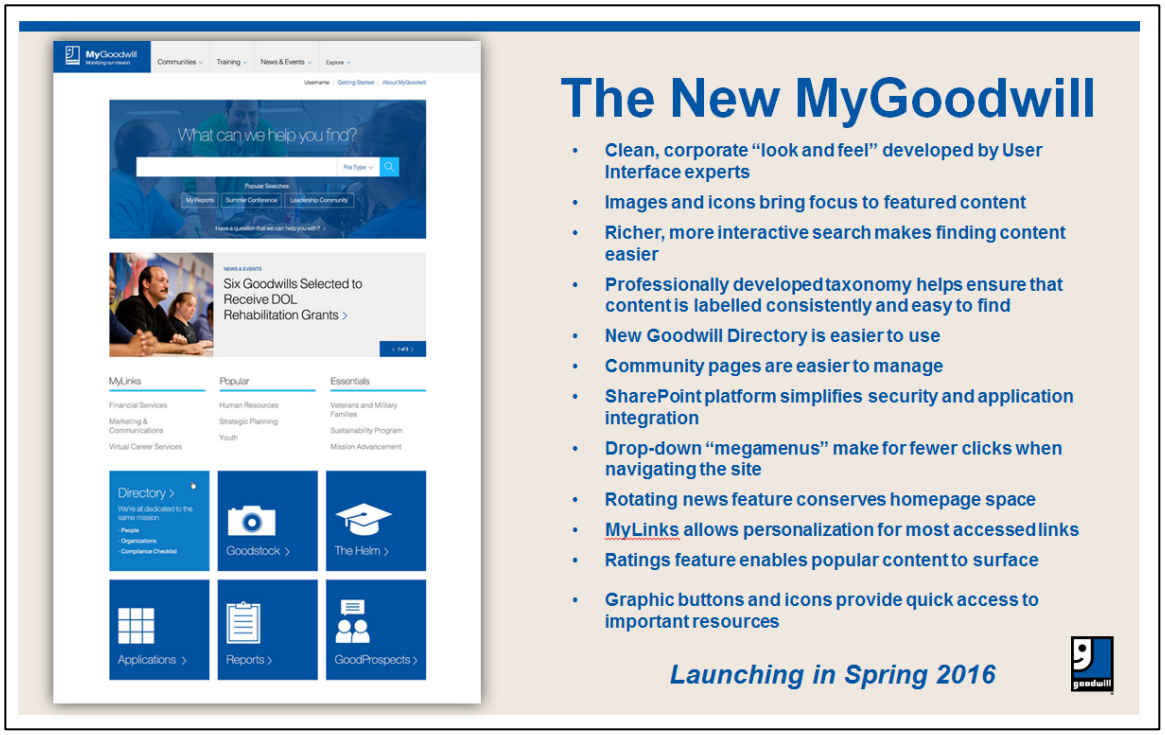


Image 63. Goodwill Intranet Retail Community Landing Page. This community landing page features the blue tile-based navigation that points users to deeper site sections that are not easily accessed through browsing. When a user hovers over one of the blue tiles, the icons slide up to display a short description of the destination link. *Goodwill_08_tile_navigation.png*

Adoption and Buy-In

One of the biggest challenges of an intranet project is getting buy-in from across the organization and enticing employees to use the new site. The GII team worked hard to make that happen. McCrehan describes some of the efforts that particularly paid off and contributed to buy-in and adoption for the new GII intranet:

- **Power users.** "Power users were enthusiastic about the technology shift and, in training and workshops with internal site managers, they often pointed out the features they were excited about and that were improvements over our previous site. In meetings with senior leadership, our team shared similar insights about the improved security, flexibility, and extensibility of the new site. Senior leader buy-in was critical, as they needed to secure their teams' full participation in the tagging process in order for the search to be successful."
- **Town hall meetings.** "We drummed up energy in town hall meetings by introducing new talking points for our Rockville-based team members to share as they were working with individuals at our member organizations. These talking points included the research we had done to respond our users' input."



This slide from a training presentation for the new Goodwill intranet features talking points used to drum up energy for the project rollout.

- **Wooing member organizations.** "We knew it was important to win over leaders at our member Goodwill organizations. Three months prior to launch, at a conference specifically for our executives, we had a session dedicated to introducing them to the new design, explaining our rationale and roadmap. We invited them to ask questions, and participate in ongoing feedback opportunities. Within two weeks of our launch, more than 25% of our CEOs had participated in a customized, hands-on live training webinar to introduce them to the site."

  Following are examples of CEO user feedback that resulted from these sessions:

  > "It is much more intuitive and user friendly on first glance. I do appreciate your efforts."
  >
  > "The site is a tremendous step forward. Thank you!"

- **Weekly live webinars.** "For the first three months following the launch, we scheduled weekly live introductory training webinars about the site. Additionally, we provided a series of 15 recorded mini-tutorials on important sections and features of the site. Total views of those mini-tutorials in the first 11 weeks were 1,230. A robust *Help* page includes links to FAQs and an online "who to call" reference. At Goodwill conferences in May and August, special sessions were held to introduce users to the site."

  Following are examples of anecdotal user feedback from these sessions:

  > "I've been with Goodwill for over 11 years, and I've used MyGoodwill since I can remember. I love the new revision of the website! Best I've ever used."
  >
  > "[I am a] first time user of the new site today and just wanted to say that I really like the new feel! Very open and much easier to find things so far! Thank you!"

Building Adoption over Time

It is important to remember that adoption and buy-in do not end at launch. Like a garden, intranet teams must continually tend the intranet so it grows and produces a great harvest for the company. With that in mind, GII is planning follow-on activities to those described above.

"Engaging our champion users will be key for us going forward," says McCrehan, adding that "Users quickly clued in to the value of the *Forum*, which GII will be leveraging to capture tacit knowledge. I think as soon as people know that they can get the answers to their questions using the *Forum* as soon as they might via email, we will be able to convert users to the *Forum* for those questions. I hope so. The *Forum* will provide a permanent warehouse for our collective knowledge."

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Threespot	• IA and graphic design
Protiviti	• Infrastructure review • Directory design and development • Backend development
Wand, Inc.	• Content analysis and design of fundamental business taxonomies

GOVERNANCE

The intranet is owned by the Governance team, which is comprised of digital/knowledge management and IT leaders. This placement has positively impacted processes and strengthened communication channels. Through this joint ownership, the digital team better understands the technology's complexities and resource requirements, and the IT team better comprehends the needs of users. The teams can be transparent and accountable to each other and to constituents by sharing in the Agile process.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Core Governance Team	• Conduct overall site development strategy and planning • Evaluate new requests from stakeholders • Monitor data, including usage and performance, and consider areas for improvement • Oversee JIRA/Agile process • Oversee training for GII staff, Goodwill users, and directory administrators • Oversee communications and engagement strategy
Development Team	• Administer the SharePoint farm • Consult and execute on priorities for new sites and features • Configure unique permissions • Advise power users • Collaborate on integration of other Microsoft platforms
Power Users	• Advise community managers on site layout • Utilize web parts and other features, including views, to achieve community manager goals • Provide permissions at community level • Train community managers to maintain content and features
Community Managers	• Create content and upload documents • Promote and monitor forums • Monitor and report on usage on a monthly or quarterly basis • Remove outdated content • Respond to user requests and needs • Assign contributor rights
Contributors	• Create content and upload documents • Promote and monitor forums

	• Remove outdated content • Respond to users requests
Training and Helpdesk	• Create recorded training modules • Conduct live training sessions for users and directory administrators • Resolve user issues, including password and new account requests

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://my.goodwill.org
Access/Remote Access	• Users at the company's Rockville, Maryland, location are authenticated through a Windows login and Active Directory. • Registered MyGoodwill users at Goodwill member locations access the intranet through the programmatic form-based authentication (FBA) method.
Shared Workstations or Kiosks	Most users are based in the local headquarters of the 164 Goodwill member organizations and typically have dedicated offices and workstations. However, some employees who manage stores, contracts, and job services at other locations access via share workstations.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
April 2001	• First MyGoodwill intranet launch
October 2005	• Redesign launch with discussion forums (Liferay Open Source)
April 2010	• Launch with web 2.0 collaboration across the site (Alfresco Open Source)
February 2014	• Plan for enterprise shift to Microsoft technology • Begin infrastructure design and build
January 2016	• Implement page templates (look and feel)
April 2016	• Alpha launch: test three community sites
April-May 2016	• Beta launch: Test entire site
May 2016	• Launch of new design in SharePoint 2010
Overall redesign timeframe: 2 years	

CONTENT AND CONTENT CONTRIBUTORS

Distributed Content Oversight

Many people across the GII organization touch various components of the content map:

- **Governance team.** The organization's 10-person governance team members are from the digital content and software development/IT functional areas. This team monitors the health of the site; reviews and prioritizes fixes, feature enhancements, and new site requests; and is responsible for planning.
- **Executive subcommittee.** A small executive subcommittee of digital and IT team leaders collects and reviews suggestions for significant updates to features and content.
- **Power users.** Power users advise community managers and assist them with page layouts and web parts. Members of the GII power user team also manage content that appears on the intranet homepage, on each primary navigation landing page, and on the site's *News & Events* section. Homepage content, such as popular searches, featured content, and essential links, is updated based on search and page-view data pulled from analytics.

- **Site owners.** Another group responsible for content comprises GII staff members who operate as site owners for their respective community sites. For example, the GII mission advancement team is responsible for contributing and updating content on the main MyGoodwill *Mission Advancement* site, as well as all of its subsites. Each site has one or two primary site owners who are responsible for maintaining the site's landing page and adding content. Each team can also appoint a number of site managers, a role that lets those users post content but not modify the homepage.

  Content management within SharePoint sites is handled directly by site owners. For example, content within Goodwill's *Marketing and Communications* community is a shared responsibility held by appointed members of the marketing, public relations, and digital communications teams. These team members coordinate the posting and promotion of campaign toolkit materials, which often include assets from all three teams. Site owners are responsible for guaranteeing the accuracy and quality of the content they post.

  Contributing and maintaining intranet content is considered part of the job function of site owners and managers. GII is known by its local Goodwill organizations as the Member Services Center (MSC), and many GII employees have a direct role in equipping local Goodwills with the information, services, and resources they need to advance their mission and business lines. The intranet is viewed as one tool through which this empowerment can take place, supplementing traditional email and phone-based interactions.

- **Other content managers.** Content for the site's news section is submitted by staff members at local Goodwill organizations and internal SMEs at GII. It is then vetted and posted by GII's communications specialist. Events content (such as webinars and trainings) are submitted by GII staff and added to the site calendar by GII's communications and public affairs program assistant.

Encouraging Contribution

The intranet team emphasizes that contributing content is not simply a checkbox that site owners and managers must tick, but rather is a professional development opportunity that staff can use to hone their writing skills and position themselves as SMEs for the larger Goodwill membership.

GII site owners and site managers are most receptive to contributing content in response to a time-based need, such as releasing a toolkit or report, advertising an upcoming webinar, or promoting a funding opportunity. When developing project or promotional plans, internal communications is increasingly a line item that staff members are accountable for. This includes contributing article content for GII's *News & Events* page and promoting the initiative within their own MyGoodwill site.

Encouraging intranet content contribution beyond these need-based updates often requires steady nudging. For example, if the team observes a site owner sharing an announcement, new resource, or other information to local Goodwill members via a

listserv, power users might send a message encouraging that person to post the content on MyGoodwill as well. Further, if they notice sites with content that has not been updated for a while, power users might contact the site owners to see if they have any recent developments or news that would be worth sharing.

Training

Over a three-month period during the intranet redesign, GII power users and Protiviti consultants held workshops and worked one-on-one with site owners and site managers across the organization to train users on how to configure their sites. This training included technical instructions and quick reference guides on how to use SharePoint to post content (including files, articles, and images), as well as strategic advice on how to keep content fresh and how often to update it. This one-on-one training was reinforced through broader organizational trainings on the topics.

Content management training continues to be a priority post-launch. The organization's monthly intranet brown bag series includes training and facilitated discussions on generating content ideas, leveraging team members' expertise as writers, developing editorial calendars, and promoting posted content (for example, via listserv). Also, training on writing for the web is offered annually to all staff members.

Maintaining Quality

The GII power user team is still engaged with GII staff members in post-launch training and development, and will continue to provide content guidance and support in the months ahead. More time is needed to identify emerging content issues and to determine how best to address them through feedback.

Content Guidelines

GII provides the following guidelines to GII site owners and staff members who are tasked with writing article content for their own sites or for the Goodwill *News & Events* page:

GUIDELINES ON WRITING FOR THE WEB	
Length	• **Ideal post length:** 250–400 words • **Average reading speed of most people:** 200 words per minute • **Keep paragraphs short:** 1–3 sentences per paragraph
Audience	• Make information accessible by writing to your audience's reading/skills level • Avoid unfamiliar or technical terms • Aim for a 6th–8th grade reading level (as in most newspapers); check text grade level at http://www.storytoolz.com or using Microsoft Word's built-in feature
Link to External Resources	• Add hyperlinks to external resources/information whenever possible • Keep main text concise and give users links to more info
Keep Paragraphs Short	• Encourage reading by offering short paragraphs • Keep paragraphs to 1–3 sentences and hit "return" more often • Look for ways to shorten longer paragraphs, such as by rephrasing, breaking text into multiple paragraphs, using bullets, or adding hyperlinks
Use Bullets	• Use bullets when conveying a list of tips or sequential information • Aim for at least three bullets and no more than seven • Helps readers quickly locate the important information
Use Subheadings	• Use subhead to help users scan the article and make the text more visually approachable

Guidelines for News Articles

GII developed the following guidelines for staff members at local Goodwill organizations when submitting news for its *News & Events* section of the site.

When submitting articles for Goodwill News, please keep in mind the newsletter's priority topics:

- **Best practices across all disciplines.** When submitting a news item, consider elaborating on the process leading up to your event or achievement. Consider incorporating details about inception, planning, goals, challenges faced, results and advice you would give other Goodwills who may undertake similar efforts.
- **Innovative ideas.** If your agency has had successes trying something new in its operations, mission or communications initiatives, we want to hear about it.
- Awards, certifications and other recognitions earned by your agency, including those earned by individuals, teams and the entire agency.
- CEO news including news spotlights, recognitions, retirement announcements and new hires.

Guidelines for Selecting Photos

Finally, GII developed a slide-based guide for site managers on how to choose appropriate photos for use on MyGoodwill. The guide can be accessed at http://bit.ly/MyGPhotoGuide.

Culling Content

As part of the redesign, GII team members successfully reduced the amount of documents on the intranet. Prior to site migration, site owners took part in a cleanup period, reviewing the files and content within their respective sites and making decisions about what content to migrate. The team created an archive folder within each site on the old intranet; site owners used the folder for any files they wanted to save for historical and archival purposes, but that didn't need to be migrated over to the new site. During the migration, IT team members were instructed to bring over all files except for those inside a site's archive folder. The old content remains accessible to GII staff members through a specialized access URL.

What Worked and What Didn't

- **Effective team collaboration worked.** The cleanup process worked best when multiple members from the same team were engaged and made collective decisions about which content to keep, archive, and delete. Many individuals had not fully explored their site's content and were surprised to learn what was and was not available. Having team members work through the existing site content together fostered conversations about how well the content reflected the teams' strategic priorities and helped identify content gaps where additional information or files are needed.
- **Independent decisions were less effective.** The cleanup process was less effective when managed by a single individual appointed by his or her team to complete the task by a deadline. Without input from their teams, individuals had to make independent decisions about what to keep, archive, and delete from their sites. This process allowed teams to complete the task on time, but led to delays and surprises post-migration when the other team members found that the migrated files did not match their expectations regarding what content should be available on the site. For specific sites, the GII IT team deleted the newly migrated files, and encouraged the site's team to return to the original site and make collective decisions about what to keep, archive, and delete. Once the team reached a consensus, the files were migrated again into the new environment.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Windows Server 2012 R2 • SQL Server 2012 (and later) • SharePoint 2010 Service Pack 2 • Microsoft Dynamics CRM 2013
Bug Tracking/Quality Assurance	• Atlassian JIRA
Design Tools	• Optimal Sort Chalkmark • Basecamp • InVision
Site Building Tools	• SharePoint 2010
Content Management Tools	• SharePoint 2010
Search	• SharePoint 2010 • WAND Taxonomies (Excel and Google Docs)
Directory	• Microsoft Dynamics CRM

Technology Evaluation

In early 2012, GII made the strategic decision to begin unifying its overall application infrastructure. At that time, the organization used an eclectic mix of .NET applications, Alfresco CMS, SugarCRM, PHP, ColdFusion, Java, and WordPress. Each of these frameworks requires very different skillsets, and being an organization of limited resources, the intranet team thought it best to move toward unifying around a common application platform and skillset.

They needed the chosen platform to

- Have a powerful CMS
- Have an established code base that is professionally maintained, readily available, and developed by reliable contractors
- Be extensible and flexible enough to act as a common platform for MyGoodwill as well as for new application development
- Be largely maintainable by nonprogrammers
- Leverage development skills already in-house

Secondary requirements include that it

- Have wide industry adoption

- Have a stable and maintained code base
- Have longevity in the market
- Offer easy-to-manage access and authentication security
- Be ready for integration with GII's standard office tools (including Outlook/Exchange, Word, and Excel)

Because the company's IT infrastructure is completely Microsoft (Windows Server, SQL Server, and IIS Web Server) IT operations felt that SharePoint would fit in easily and would be maintainable using its existing skills. This became another base requirement. With IT operations satisfied, team members measured SharePoint 2010 against other base and secondary requirements. It fit nicely, and they reasoned that bringing in a Microsoft flagship product was a low-risk decision.

While initial adoption of SharePoint was slow, the team began building new applications with SharePoint as the front-end. When the time came to start building out the new MyGoodwill, the team was able to get strong management buy-in and support, which greatly speeded adoption and built enthusiasm for the product.

Although they the site still has some legacy non-SharePoint applications, all new development is now being done in SharePoint, and the users and power users have become very comfortable using it. This, coupled with the enthusiasm generated by the new MyGoodwill, indicates that SharePoint was a fitting and proper strategic choice for the project.

ROI

Activity-Based Performance Indicators

Moving the intranet to a SharePoint platform provided an opportunity to track a number of new metrics not easily captured on the old Alfresco-based site. The organization now tracks several activity-based key performance indicators related to MyGoodwill use, including the following:

- **Page views.** Since the relaunch, the site has seen a 139% increase in page views, going from 6,454 to 15,470 average page views per week.
- **Search.** Search was a problematic feature on the old intranet, but its performance has also increased on the new site, growing 138% from 475 to 1,877 searches per week on average.
- **Unique users.** One new metric the team tracks courtesy of SharePoint capabilities is the number of unique users who log in to the site at least once a week (approximately 575). This number has steadily increased over the last quarter, even as the number of total user accounts has decreased due to data cleanup efforts.

Nuanced Tracking Measures

More nuanced tracking measures are also now in place with the new system. McCrehan explains how the team conducts a deeper dive into some of the more detailed aspects of site usage:

- **Total registered users. "**When we migrated to SharePoint from the old Alfresco site, we brought along roughly 11,000 accounts that had been created over its six-year lifespan. Once the new site was launched, we began to track the number of total registered users. Since May 2016, we have seen this number drop by about 1,500. We actually consider this decline to be a success, because it reflects the request of our members' local administrators to delete user accounts for people no longer with their organization. The decline confirms that this cleanup is taking place, and we expect an increase in users to begin as we move into 2017."
- **Top visitors.** "SharePoint allows us track the top visitors to the intranet in any given time period. This information gives us a sense of what users, departments, and member Goodwills are most frequently using the site. With this data, we know who we can engage as super users (individuals who frequently visit the site) as well as those groups that present the greatest opportunities for outreach and training on the new site."
- **Heavily trafficked days of the week.** "Other soft performance metrics we track include the most heavily trafficked days of the week (Tuesday, followed by Monday), and the most heavily trafficked hours of the day (2 p.m. EDT, followed by 3 p.m. EDT). This information is used to inform site owners of the most popular time to post MyGoodwill content and promote MyGoodwill content assets on the listservs. We also regularly collect qualitative feedback on MyGoodwill at Goodwill conferences and events following presentations or at a conference booth."
- **Helpdesk requests.** "The IT team tracks the number and nature of helpdesk requests submitted by local Goodwill staff members, which average 38 tickets per week. Analyzing these tickets shows us what areas are the most difficult or confusing, and lets us take steps to address these issues aggressively. For instance, there was a marked increase in requests for login assistance, which has caused us to bring a sharp focus on steps we can take to improve account request and password reset processes. The IT team also continually tracks standard system metrics like bandwidth use, CPU and memory utilization, responsiveness, etc. In our analysis so far, we see that we have slightly overbuilt the system, but that gives us a lot of room to grow as use of the website expands."

LESSONS LEARNED

The Goodwill team offers the following lessons learned from the redesign project:

- **Formalize the governance team and work with Agile.** "The formalization of a governance team and the adoption of the Agile process provided a transparent, open environment for understanding the parameters of our resources and technology and allowed us to advocate for users' priorities. It was highly valuable that top-level leadership committed to the project as an iterative whole. This meant we could plan for ongoing improvements for short-, medium-, and long-term sprints. This created an environment in which we could prioritize work, knowing that we didn't have to take any important and/or innovative ideas off the table. Our frequent mantra was, 'Not no, just not now.' The process also allows us to continue to conduct and be responsive to user experience work moving forward."
- **Listen, listen, listen.** "Getting in the minds of our users was a fundamental shift in the way we thought about our new site. For 15 months before we launched, we engaged with our users in various UX surveys, focus groups, and one-on-one opportunities to understand their issues. For them, time and findability are at a premium when they use the site. They will remain engaged if they can find what they need."
- **Focus on features that help get the job done.** "Our digital team might have enjoyed geeking out with potential new features and social options in the site redesign, but our team-wide collaborative needed to focus on providing a valuable service to users, and to get down to the business of surfacing content to help them do their jobs. Granted, this is not sexy, and the investment in search was complex and time consuming, requiring all-hands-on-deck participation by our Rockville-based employees, but this helped create a feeling of ownership, educate them about the technology, and drive them to rethink their sites' purpose and content."

IBM Corporation

OVERVIEW

COMPANY

IBM manufactures and markets computer hardware, middleware, and software, and offers hosting and consulting services in areas ranging from mainframe computers to nanotechnology. IBM is also a major research organization; as of 2016, it has held the record for most patents generated by a business for 23 consecutive years. Inventions by IBM include the automated teller machine (ATM), the floppy disk, the hard disk drive, the magnetic stripe card, the relational database, the SQL programming language, the UPC barcode, and dynamic random-access memory (DRAM).

Headquarters: Armonk, New York, US

Company locations: IBM operates in more than 170 countries.

Locations where people use the intranet: IBMers in all locations use the intranet.

Annual revenue: $81.74 billion (USD)

THE INTRANET

Users: The homepage of IBM's intranet, yourIBM, averages 11.9 million hits and more than 300,000 unique visitors per month. Whether to read company news, access administrative and HR tools, or just check the company stock price, most IBMers find themselves visiting yourIBM at least once a day. Depending on visitors' roles, work locations, and organizations, content is profiled and targeted to best meet interest and need.

Mobile approach: Responsive web design

Technology platform: A custom solution built in part using IBM Bluemix

TEAM

Design team: A team of 32 IBMers from the US, Canada, China, India, Brazil, and Ukraine partnered with five VSA designers and developers to rebuild the IBM homepage from the ground up.

Design: Jason Blackwell, UX and Design Lead, yourIBM; Colin Crehan, Strategy and Design Lead, yourIBM; Sheng Fang Fu, UX/UI designer; Zhu Hao, UI Designer; Ed McFadden, User Research and Design Lead, BluePages; Lisa Papa, Visual Designer; Mark Wise, User Experience Research and Design Lead; Sambit Paul, User Research; Jason Telner, User Research; Fang Ruan, User Research; Gopal Krishnan, User Research

Development: Lin Ye, Tech Lead; Mike Fields, Lead Architect; Josh Hansen, Lead UI Developer; Navya Nagaraj, Developer; Ryan Tercias, Senior UI Developer; Dave Westerman, Senior Back End Developer; Bhaskar Roy, IT Infrastructure Architect; Xiao Xu Zhou, Developer; Fabio Santos Ambrosio, Portal Developer; Liang Fan, Developer; YingJun Sun, Application Developer; Lohitha Acharya, Senior IT Specialist; Lyle Watt, Solution Architect; Richa Suhane, Application Developer; Sandro de Santis, IT Architect; Steve Black, Front End Developer; Jiang WH Bian, Senior Tester; Bo Zhang, Tester; Fu Xiong, Tester

Project management and support: Janis Pasquale, Initiative Lead; Tom Hawkins, Project Manager, yourIBM; Kristin Wisnewski, Manager, Design and User Experience; Bharath Subramanya, Agile Project Manager; Mariana Alemany Honorato, Iteration Manager; Juan-Carlos Arias, Iteration Manager; Miroslava Mironchuk, Employee Awareness and Engagement Lead; Matt Funk, Project Manager, BluePages

VSA Partners: Jason Horwitz, Director of Technology; Michael Trovela, Senior Designer; Lynn Yeom, Designer; Andy Principe, Developer; Ben Brown, Front End Developer

INTRANET TEAM



Team members shown here (left to right): Lisa Papa, Janis Pasquale, Kristin Wisnewski, Gary Kuo, Tom Lawless, Tom Hawkins, Donn Jasura, Mike Fields, Lyle Watt, Siddiq Nassar, Colin Crehan, Josh Hansen, Max Pugliese (obscured), Steven Black, Jason Blackwell, Greg Golden, Fletcher Previn, and Mark Wise.

HIGHLIGHTS ABOUT THIS WINNER

IBMers perform jobs that range from the expected, such as coding and selling, to the less expected, such as predicting natural disasters and coauthoring recipes with IBM Watson. The challenge for the new w3 homepage (yourIBM) was to support all IBMers' needs. The way the IBM team achieved this was to assemble a large and talented team, push open source to its limits, and improve upon Agile by creating a dedicated user research scrum team with its own backlog of research activities. The result is an intranet that excels across a wide spectrum of user needs.

- **Homepage as personalized, customized hub.** Ensuring that employees can quickly access the intranet area they need was of great importance to the designers. Personalization helps tremendously, as "yourIBM homepage" suggests topics employees need based on their role. The rapid results search system provides role-specific categories (e.g., managers) that appear only for that role. The homepage also lets users organize their space and their work in ways that make sense to them. This customization is helpful as long as it is easy to do and users realize that the results will be worth it. In other words, the perceived benefits of customizing must be higher than the cost of customizing.

- **Reducing fracture points.** The IBM intranet users "cards" to gather like information into easy-to-manage containers. Cards are organized by topic and are not tied to a single information source. By taking this approach, the design team was able to integrate related content and resources from multiple sources into a single card.
- **The intranet supports the IBM brand.** Employees (IBMers) are the company's brand, and IBM is an essential company because of its capacity to amaze and delight customers. To achieve this, IBMers must be able to focus on their clients — not on figuring out IBM, IBM tools, and IBM tasks. yourIBM presents a coherent, integrated digital workplace to IBMers that supports them in their efforts to amaze and delight.
- **Distributed governance.** As a very large company, IBM maintains key partnerships among its stakeholders (such as the Communications and Learning teams); as a result, yourIBM is not fully owned by a single entity. These internal partnerships not only help deliver content and tools, but also help the organization explore new approaches. The Communications team, for example, helped the intranet team move beyond viewing employee engagement as simply delivering news headlines. So, in addition to headlines, the intranet features a quick poll system (the Minipulse card) for soliciting and sharing employee opinions on topics and a top-of-page banner for occasional "can't miss" messages. In this way, engagement occurs through many more options than simply: *please follow this link and read what you find there*.
- **Connecting social collaboration silos.** Prior to yourIBM, the IBM intranet social spaces were largely separate from the rest of the intranet. For example, users could share pages with colleagues, but only by copying the URL and pasting it into a separate status update tool. yourIBM now gives users a way to comment, share, bookmark, and like content directly from the intranet homepage.

  Social streams are also surfaced in the yourIBM status updates card. This card gives users a sense of what colleagues in their network are talking about and lets them directly participate in the conversations.
- **Rapid results search.** The rapid results search system that powers the intranet is a pride point for the organization. It has moved the needle on a common intranet problem — ineffective enterprise search. Not only does the system provide immediate "best bets" (the top 300 queries account for 35–40% of all searches), but it also pulls from several data sources and services. Additionally, it is personalized. For example, managers see a category of results that other roles do not.
- **Integration.** yourIBM lets users deal with a given task in one place — even if that task requires four tools to work together behind the scenes.

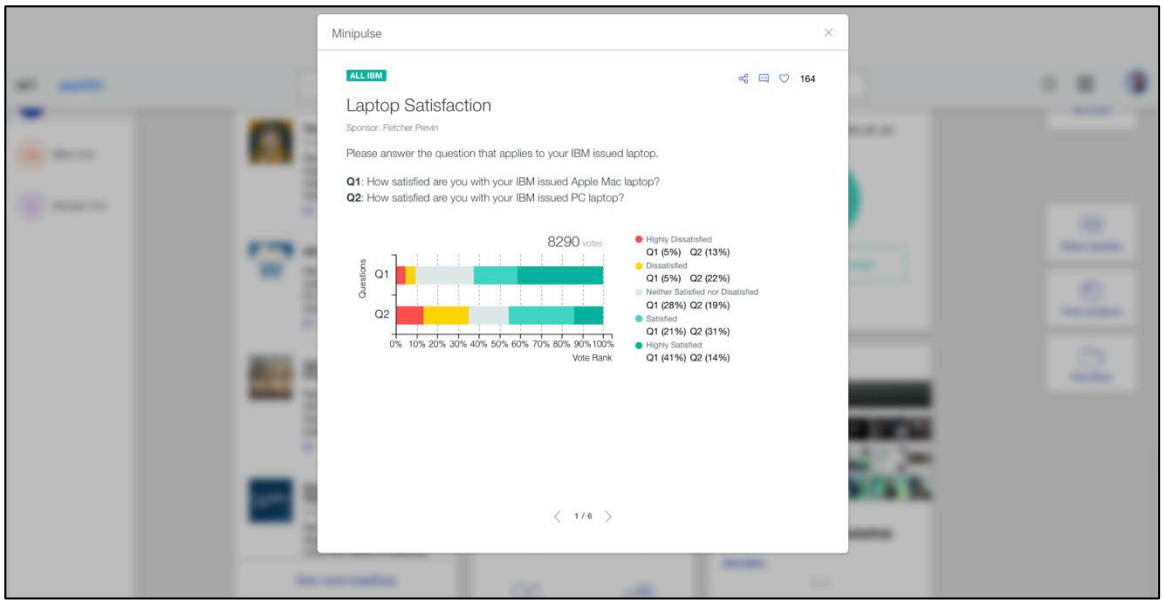


Image 64. IBM Intranet Minipulse. Minipulse is a user poll card. Polls can be targeted to all of IBM, or to specific job roles, organizations, and so on. When a new poll is available for a user, that user sees a badge.
IBM_01_Minipulse_Expanded.png

BACKGROUND

Bigger is Better — But There Are Limits

IBM has a long history of evolving its intranet, w3; so, in the strictest sense, this redesign was not driven by a single, specific event. Rather, the goal was to keep up with "internet speed" in terms of keeping employees productive and exploring new solutions for customers.

With this redesign, one of the themes that emerged was the fact that an intranet the size and capability of IBM's is both a blessing and curse. For example, the w3 search application has an index of more than seven million pages — and that's *after* cleanup. The search crawler has found more than 30 million. Large spaces such as the company's social collaboration space (IBM Connections) are not included in this count. With modern information-delivery features, such as employee-generated wikis, blogs, and communities, and rapid development techniques, the company's intranet continues to grow moment-by-moment. This growth is not just in terms of information; with a company full of technology experts, new tools and solutions emerge constantly.

"The advantages are manifest," says UX and Design Lead Jason Blackwell. "Information is shared at a breakneck pace, and rare is the IBM-related topic for which you can find no information."

There are also countless tools on IBM's intranet, which serves nearly half a million people worldwide who perform a variety of tasks in a variety of roles. "Using our intranet, an IBMer can add a newly adopted child to an insurance policy, manage an

Agile project, find and connect with other IBMers, install new apps — and most other things you can think of," Blackwell says, "however, the challenges of using such a space are perhaps obvious as well."

A Guide to the IBM Intranet Ecosystem

To put the IBM intranet in context, it is helpful to understand the various parts of the intranet ecosystem and how they fit together:

- **w3:** w3 is name of the overall IBM intranet. Users also often use this term for the w3 homepage, which is commonly known as *yourIBM*.
- **yourIBM:** The homepage of the IBM intranet.
- **BluePages:** IBM's BluePages is a sister site to yourIBM. BluePages is a fast, feature-rich employee directory that shows not only a person's contact information, but also a photo, work location, and online status. The BluePages team is rapidly working to integrate additional employee information into the site, including LinkedIn content, expertise, and certifications.
- **IBM Connections:** The company's social collaboration space.
- **Information spaces:** *You & IBM* (HR information), corporate news, learning, self-directed IT help, corporate security, and so on.
- **Tools:** Rational team concert (RTC), JIRA, travel and expenses, *Workday*, HRMS, e-meetings, Verse (mail), and so on.
- **Role/BU/location-specific sites and tools:** The company has many information sites and tools specific to a certain role, business unit, location, and so on. Several of these sites require authentication to access.

Challenges

Following are some of the intranet challenges that emerge at a company of IBM's girth:

- **Search.** IBM employees have issues finding information and resources when using search. The intranet is simply too vast to be readily browsable; even if a compelling IA could be developed, years of poor tagging and organization would make it daunting to implement. Adding to this problem is the fact that social tools have led to an explosion in unstructured data. Additionally, keyword searches for solutions are much more common than browsing. IBM employees expect internet-quality search results on the intranet, which isn't as easy to do as the average IBMer seems to assume.

- **Navigation and fractures. "**A ton of pages, a ton of tools, and more than a little bit of redundancy leads to a fair amount of bouncing around," says Blackwell. "For example, the IBM intranet features more than five ways to share a file with a colleague. This means a user may have to go to multiple spaces in the course of a given day to do what is, conceptually, a single task." Add to that the fact that sharing a file is merely one step in a series of tasks that might require multiple tools, and simple interactions become complex. The situation is further complicated by the search problem described above: w3 has specialized searches for w3 pages, social content, people, help documentation, tools, and more.
- **Complexity.** The intranet at IBM is complex, as is the company itself. Navigating the intranet's many tools and platforms is therefore challenging, particularly for new hires. For example Checkpoint, ISSI, Bond, BluePages, Connections, and Verse are just a few of the tools that new IBMers will likely use within their first week of employment, and people are unlikely to join IBM knowing anything about these tools. The intranet must accommodate the ramp-up period for employees who are new to the culture and terminology.

Other challenges the team faced were challenges that many teams face, even those whose intranets are more modest in size and complexity:

- **Deadlines, budget, and resources.** Simply put, every team building an intranet must face these challenges.
- **Commercial expectations vs. enterprise realities.** Technology is no longer a domain of the elite as users hold bleeding edge technology solutions in the palm of their hands every day. These commercial solutions are backed by companies that invest heavily in improving the technology so they can stay competitive in the marketplace, yet users often judge the enterprise solutions their employers provided by the same standards as they do commercial technologies. Making such a comparison is unreasonable; employees do not consider what Google invests per day to ensure quality internet search results for the masses, versus what an average company invests per year in enterprise search results for its internal audience. This dynamic leads to many challenges of the kind the IBM team considered: "How do we deliver commercial-level quality with enterprise-level investment?" "Do we go for a vendor solution, and then face the challenges presented by integration and investment?" "How do we combat the reality of choice in the marketplace and lack thereof within an enterprise?"

- **Applying an Agile approach to an increasingly agile organization.** IBM — and, specifically, the IBM CIO organization — is moving toward a more Agile culture. This change not only led to some reorganization during the most recent intranet redesign, but also to team members organizing the project in new ways. While many of the team members had Agile training, this project was large-scale Agile — that is, a large tribe organized into multiple smaller squads. The team transitioned to co-located squads, but the fact remained that each squad was based in a different location. Some squads dealt with a 12-hour time difference between them. Furthermore, the vendor partner, VSA Partners, has its own culture and level of Agile maturity. The IBM team is proud of the outcome — and equally proud of the efforts made and the lessons learned while the organization was undergoing a culture change.

The team's project goals reflected these challenges. Those goals also provided a set of guideposts for team members to keep in mind as they designed the new platform. Blackwell explains:

- **Do not neglect the basics.** "Your design is rendered irrelevant if your page doesn't load, and it is hard to thrill users when they are frustrated by page load times. Regardless of our urge to create an intranet that 'does more,' many users just need to be able to search and navigate effectively. Reliability, performance, search, and navigation were therefore primary focus areas."
- **Create a simplifying top layer.** "The entire intranet will not be reborn overnight. However, in a time of services and APIs, it doesn't need to be. We wanted to exploit services to bring more value and simplicity to the user at the top layer, even if behind the scenes that 'simple' function calls multiple systems."
- **Create a flexible framework that allows for growth and evolution.** "As part of our Agile culture change, we wanted to embrace constant improvement and 'failing quickly.' Thus, we not only focused on creating an end-user solution, but also a reusable, flexible framework that allowed for evolution of our core solution, as well as making it easier for other intranet solutions to evolve."

DESIGN REVIEW

Homepage

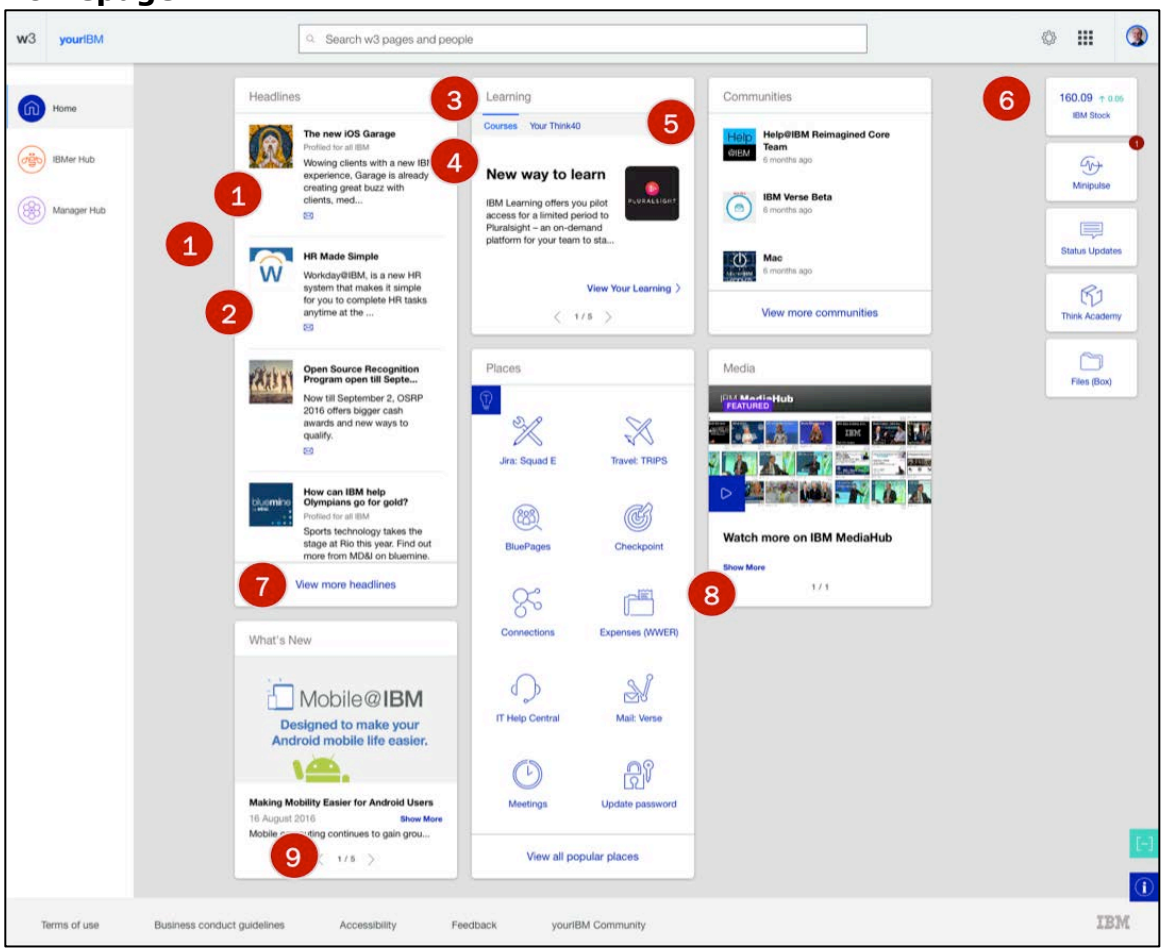


Image 65. IBM Intranet Homepage. The IBM w3 intranet homepage, yourIBM, offers movable cards with three different content modes. These cards include information personalized to the logged-in user.
IBM_02_Homepage_live.png

Homepage Highlights

The IBM intranet has a host of helpful options and too many valuable pages to count. But the most helpful page is clearly the homepage, *yourIBM.* This page name reinforces the notion that the page is personalized for the logged-in user. (Logging in is not yet required on w3, but doing so unlocks valuable features.)

The homepage's main organization instrument is cards, which include topics such as news, social updates, links to w3 tools (*Places*), and *Communities*. Each card houses information about a particular topic, and the sources for information within each card can come from different places. For example, the *Status Updates* card consolidates information from social channels to enable employees to communicate — that is, to comment, like, and share — on the homepage. The *Rapid Results* card consolidates various media types related to a topic the user searched for. For example, a search for the word "sales" will suggest the most frequently accessed pages on w3, the latest sales-related news article, and the people who are most recognized as expert sellers.

The cards enable *yourIBM* to collect and consolidate the content that each employee needs (even if that information is stored in many different places across the organization) and package it up in a neat, obvious, accessible way. This type of feature is valuable at any organization, because finding information can be challenging on any intranet. But the sheer volume of people at IBM and the very wide variety of job roles — from writing computer code to writing recipes for Watson and everyone in-between — can cause an IA quagmire. Instead of getting buried in things they don't need, employees use yourIBM to access some of their most important tools right on the homepage. This is a major win for the employees and the organization as a whole.

Other homepage highlights include the following:

1. **Card appearance.** The white cards are positioned on the page's gray background, creating a modern, simple look that still provides high contrast between the text on the cards and their background. Dark text directly on the gray page background would not have provided enough contrast for good legibility.
2. **Affordance.** Employees can reposition the cards to suit their way of working. The subtle gray border around each card provides a slight signifier that cards can be dragged and moved around the page. The border is so subtle that the page could almost be called a flat design; however, a completely flat design with no border at all would not signal that the cards were moveable.
3. **Headlines.** Each card has a title. The titles include *Headlines*, *Learning*, *Communities*, *What's New*, *Places*, and *Media.* While not huge or brightly colored, these titles are easy to scan to for a few reasons, including the following:
    - The type is different from the normal text (it's gray and larger than the normal black text).
    - Whitespace appears above and below the headline text, making it more visible.

- The headlines always appear in the upper left of the cards, making it easy for people to scan directly to them.
- The team generally aims to use generic names for cards (e.g., *Learning*) to reduce confusion, which can arise when new users encounter the company's internally branded tools (such as CareerSmart and Talent@IBM).

Cards can be displayed on the homepage in three different ways: "medium," "flipped," and "mini."

4. **Medium mode** presents basic information, including a subset of the links or icons. Medium cards can be flipped by clicking the title bar or using buttons at the bottom; they can be switched to mini mode by dragging them to the right gutter.
5. **Flipped mode** is activated by clicking the *Show More* link; this mode displays the most information.
6. **Mini mode** uses the least screen real estate and displays the least information — the headline, icon, and a red dot to indicate the number of status changes. Cards in mini mode appear collapsed to a small rectangle in the upper right of the homepage. Clicking the mini card opens directly to flipped mode, while dragging them to the left puts them in medium mode.

Of course, the homepage can't house all of the information people need and want, so yourIBM also acts as a portal to other pages. It offers three interfaces to get to these other places: card links that flip to more information, links to additional card pages within the card itself, and traditional page links. The headline links and icons link directly to the related article, page, or tool.

7. **Card links that flip.** The *View more headlines*, *View Your Learning*, and *View all popular places* links, for example, will flip the card to the expanded mode, which shows the target content (see flipped mode, above).
8. **One card, many pages.** Some cards have more than one page within them. In this case, a small page indicator (*1/4*, for example, flanked by back and forward arrows) displays at the bottom of the card.
9. **Icons in the upper left**: These appear in the upper left navigation and lead to intranet sections: one for all IBM employees, one for managers only, and one for IBM's *BluePages*, the company's employee directory.

Users can easily arrange their cards, as well as customize the *Places* card by choosing the 10 icons that will appear on it. Clicking the *Places* card's *View all popular places* link opens the *Places* modal.

Arranging Cards on yourIBM

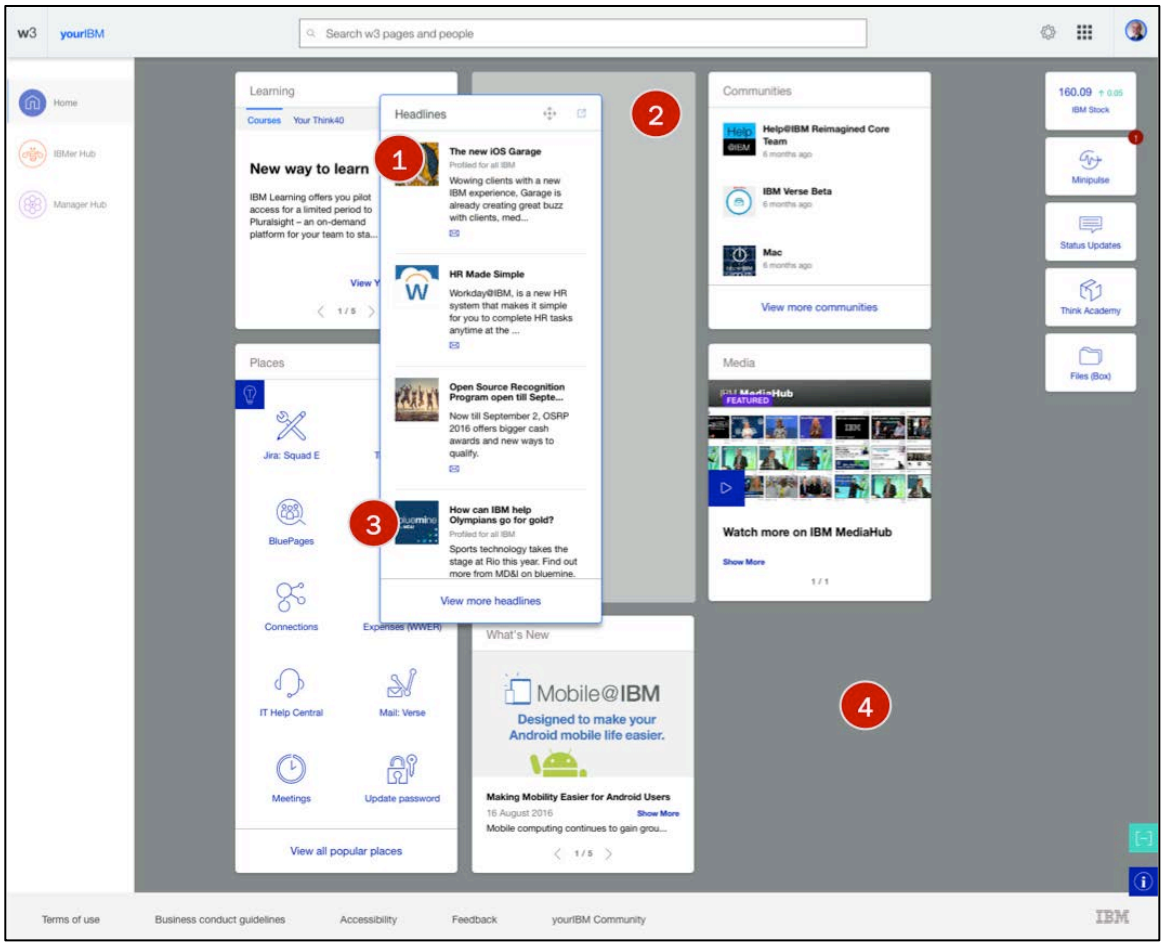


Image 66. IBM Intranet — Dragging and Dropping a Card. Dragging and dropping a card gives clear visual feedback as it is being moved. *IBM_03_Drag-and-Drop-1.png*

Arranging Cards on yourIBM Highlights

Dragging a card gives several visual cues to help employees understand their progress:

1. **Position feedback:** As the card is dragged, the user can watch its movement.
2. **Last place:** The position the card held previously remains as an empty gray rectangle, offering some stability to the user.
3. **Outline:** The card being moved becomes outlined with a thin, blue solid line.
4. **Visual mode:** The gray background for the entire homepage indicates that the user is currently in a drag-and-drop mode.

Dragging Cards to Mini Mode

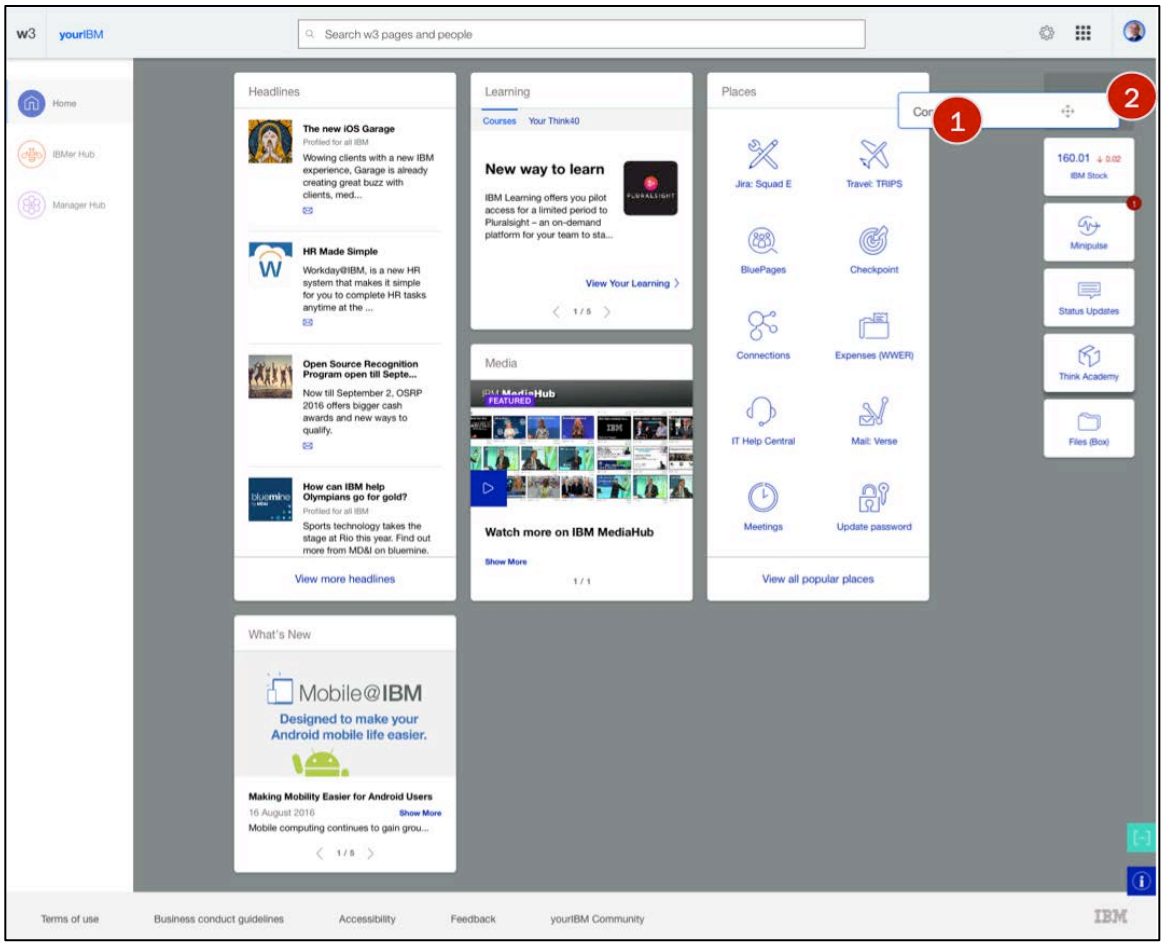


Image 67. IBM Intranet — Dragging and Dropping a Card. When dragging and dropping a card, the card decreases in size as it's being dragged to the small target. *IBM_04_Drag-and-Drop-2.png*

Dragging Cards to Mini Mode Highlights

Users can drag cards to the upper right to minimize them into mini mode.

1. **Minimized while dragging:** The card becomes much smaller as it hovers over the minimized cards section on the right.
2. **Target:** The location and size of the drop target appears as the card hovers near it.

Post Drag and Drop

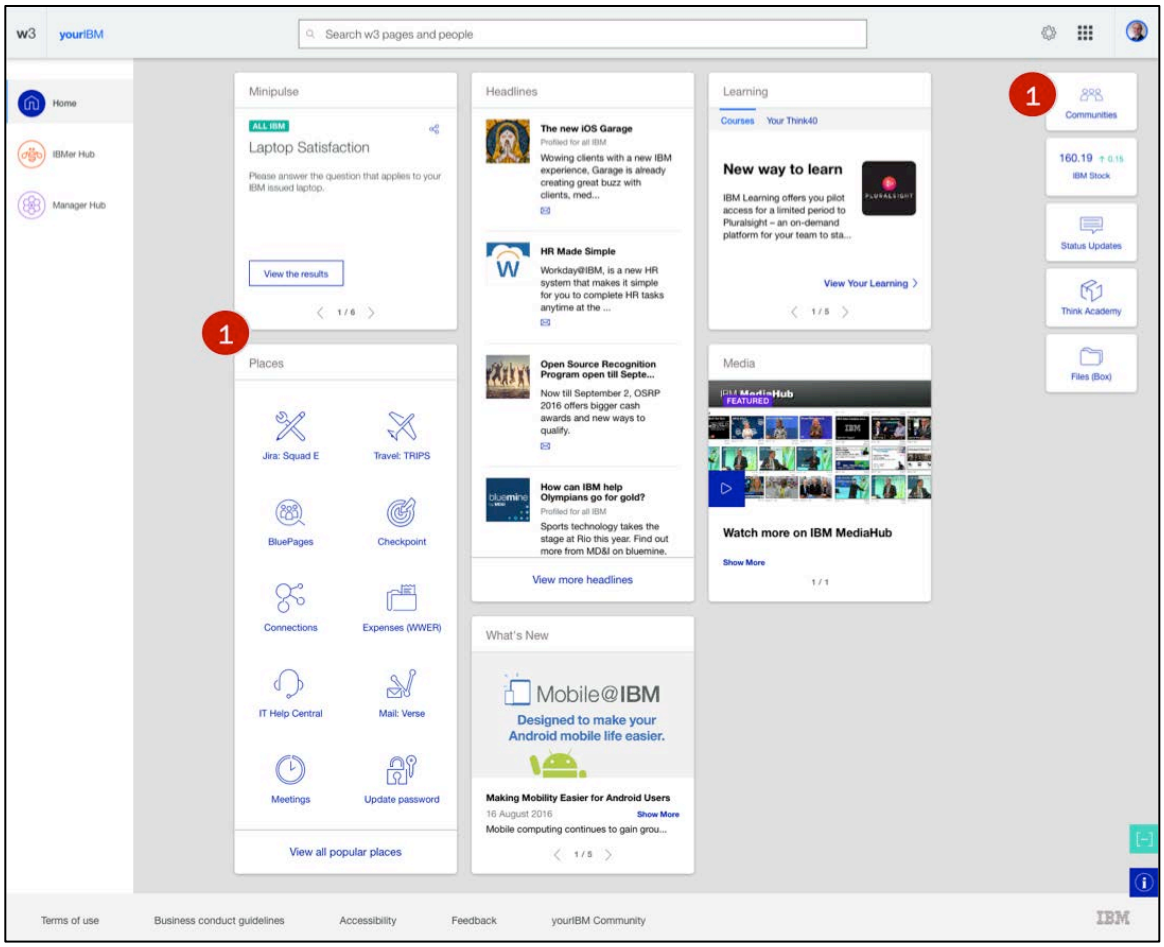


Image 68. IBM Intranet — Dragging and Dropping a Card. After dragging and dropping a card, the card returns to its normal state. *IBM_05_Drag-and-Drop-3.png*

Post Drag and Drop Highlights

1. After the drag and drop, the page goes back to its normal state:
    - **Immediate:** The cards are repositioned.
    - **Original state:** The screen's state returns to normal.

Advertising *Places* Customization

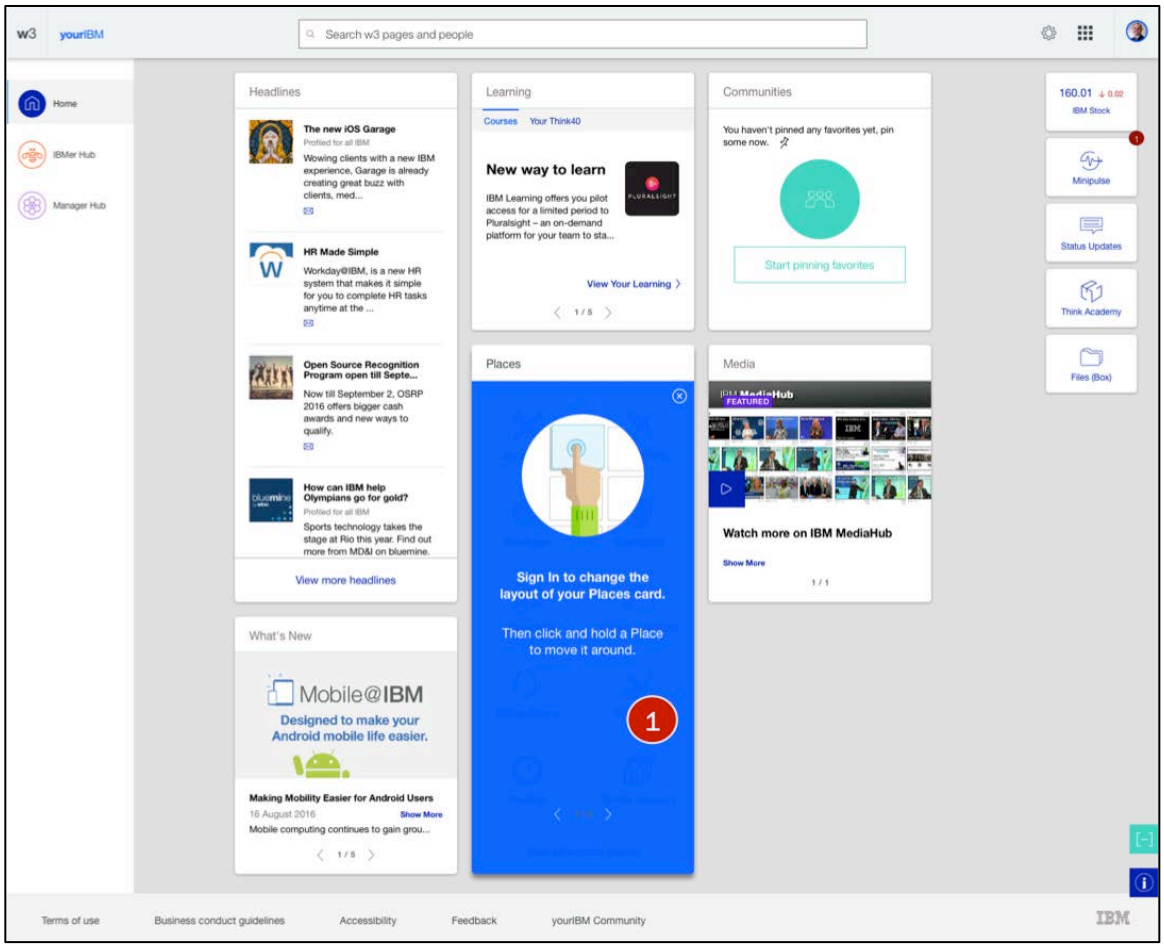


Image 69. IBM Intranet Help. The help overlay explains how users can customize the *Places* card. *IBM_06_Places_Help_Overlay.png*

Advertising *Places* Customization Features

1. One way users can learn that customization is possible is via the static help overlay, which appears in the card on the homepage when users are not logged in. The overlay indicates customization possibilities to users in two ways:
    - **Color:** The uncustomized *Places* card appears with a bright blue background; all the other card backgrounds are white.
    - **Instructions:** The text tells users to log in to customize the card, then to drag and drop.

Places

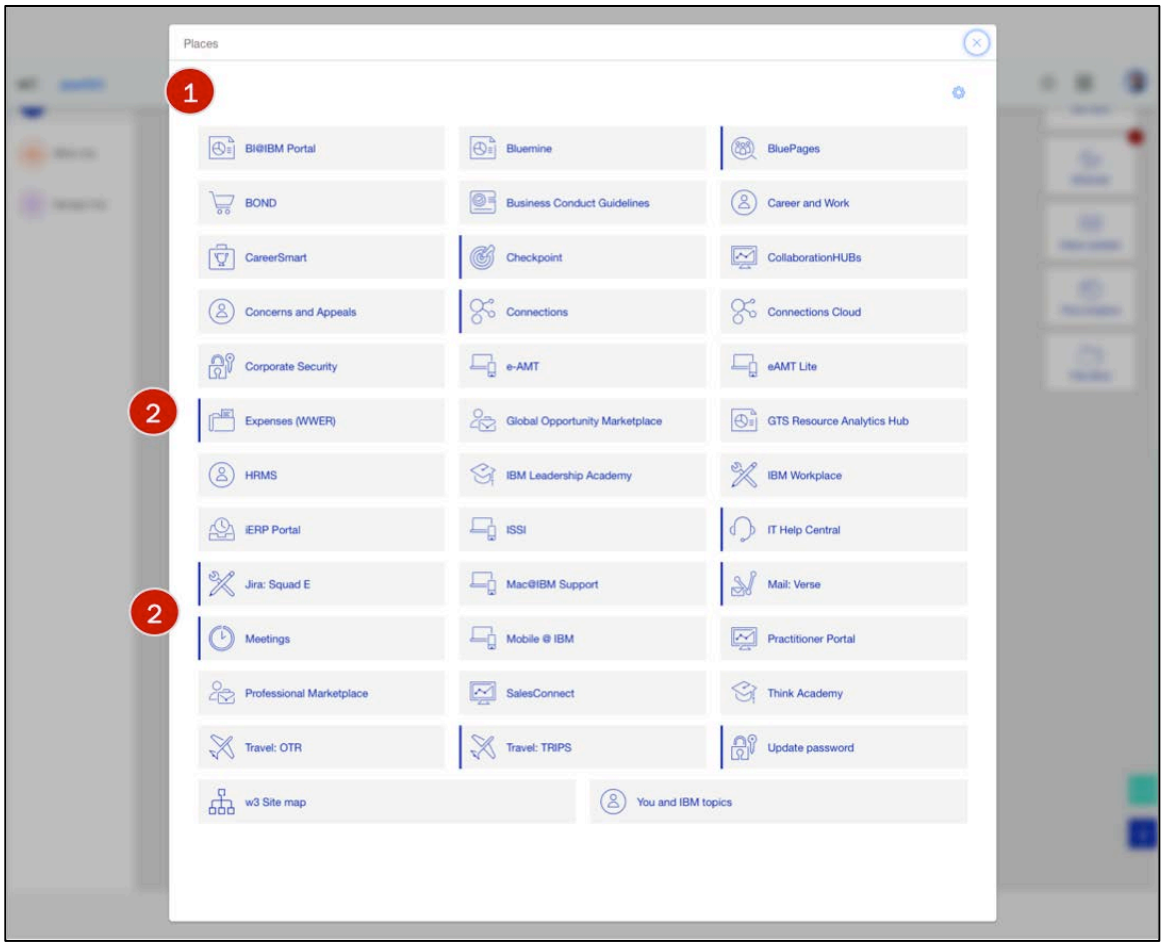


Image 70. IBM Intranet Top 10 Places. Blue lines to the left of the icons indicate the top 10 places. *IBM_07_Places_Expanded.png*

Places Highlights

1. **Buttons lead to places:** This dialog lists buttons for several tools and pages, including support, expenses, and security.
2. **The top 10 selected places:** These appear in the card on the homepage, and are indicated here with a blue line to the left of the icon.

Edit *Places*

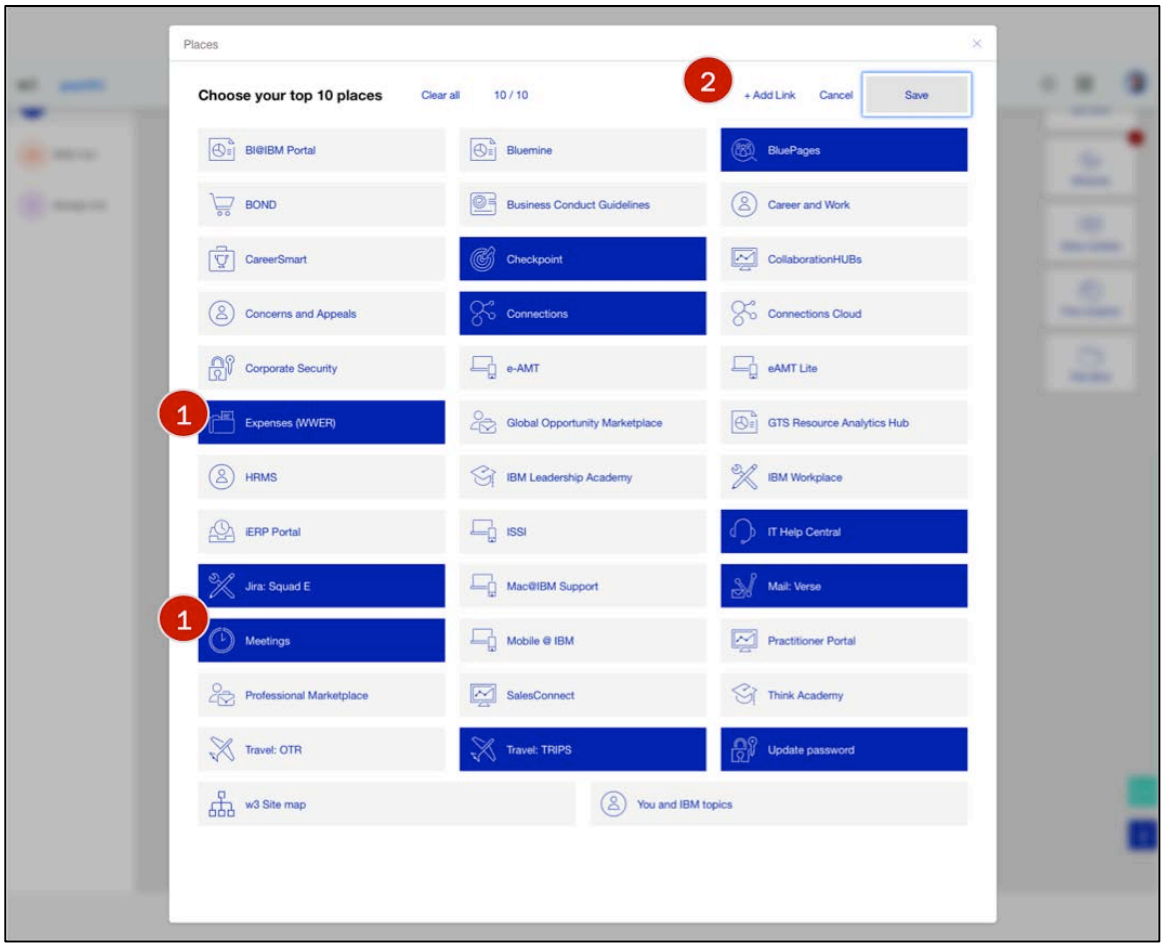


Image 71. IBM Intranet Edit Places. Employees can select the 10 buttons they want on their homepage, as well as add additional links by clicking *Add Link* at the top of the page. *IBM_08_Places_Expanded_Edit.png*

Edit *Places* Highlights

1. **Blue buttons.** Selecting an item turns it blue, indicating that it will be added to the homepage card.
2. ***Add Link*.** Users can add additional links, beyond the defaults, by clicking *Add Link* at the top of the page.

Add Link to Places

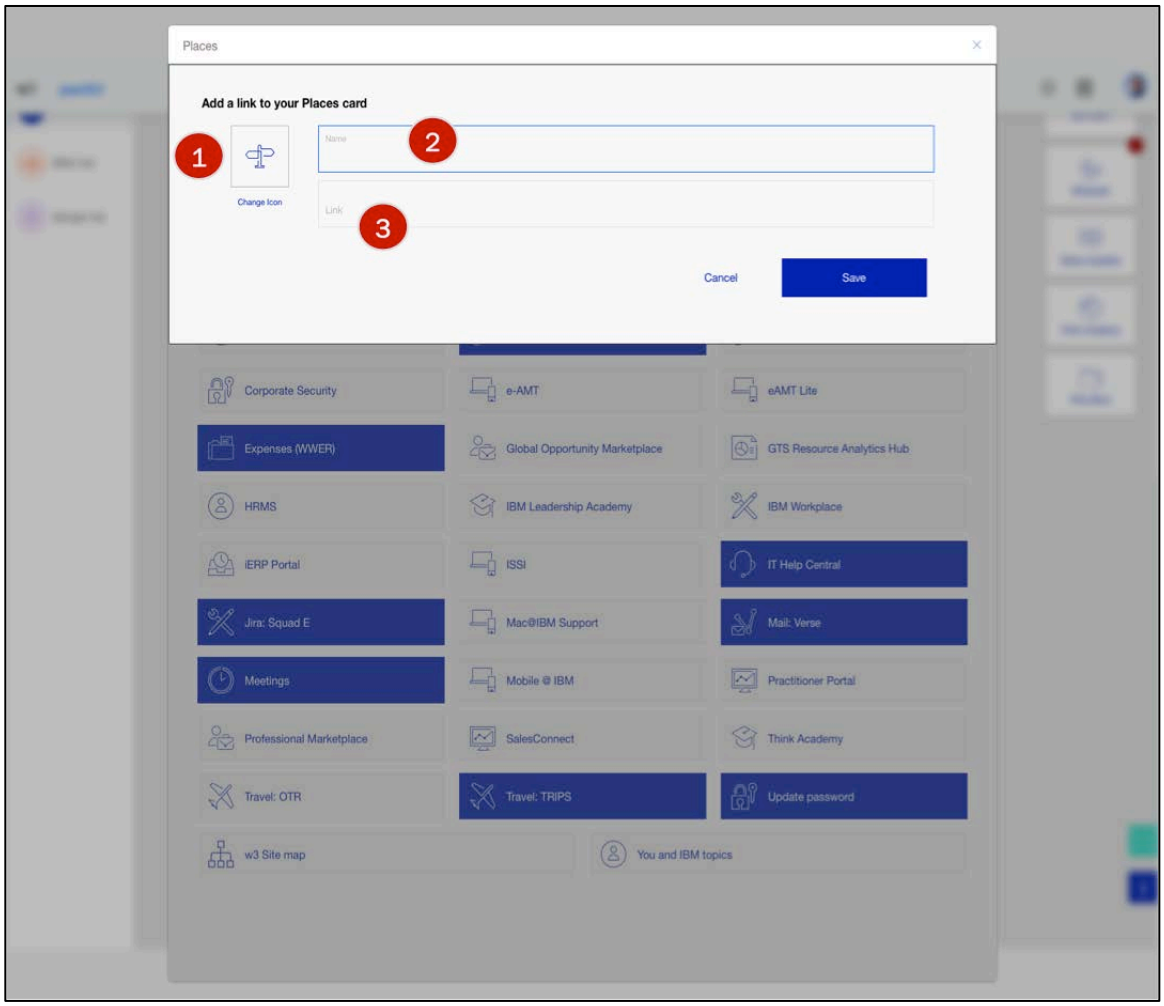


Image 72. IBM Intranet Places. Users can choose an icon and give a *Places* button a name so that it is recognizable to them. *IBM_09_Places_Add_Link.png*

Add Link to *Places* Highlights

1. **Icon:** Users can choose an icon to make the button recognizable.
2. **Name:** Users can choose a name that they understand and will remember.
3. **Link:** Users type the URL to the specific page they want to hit.

Themes

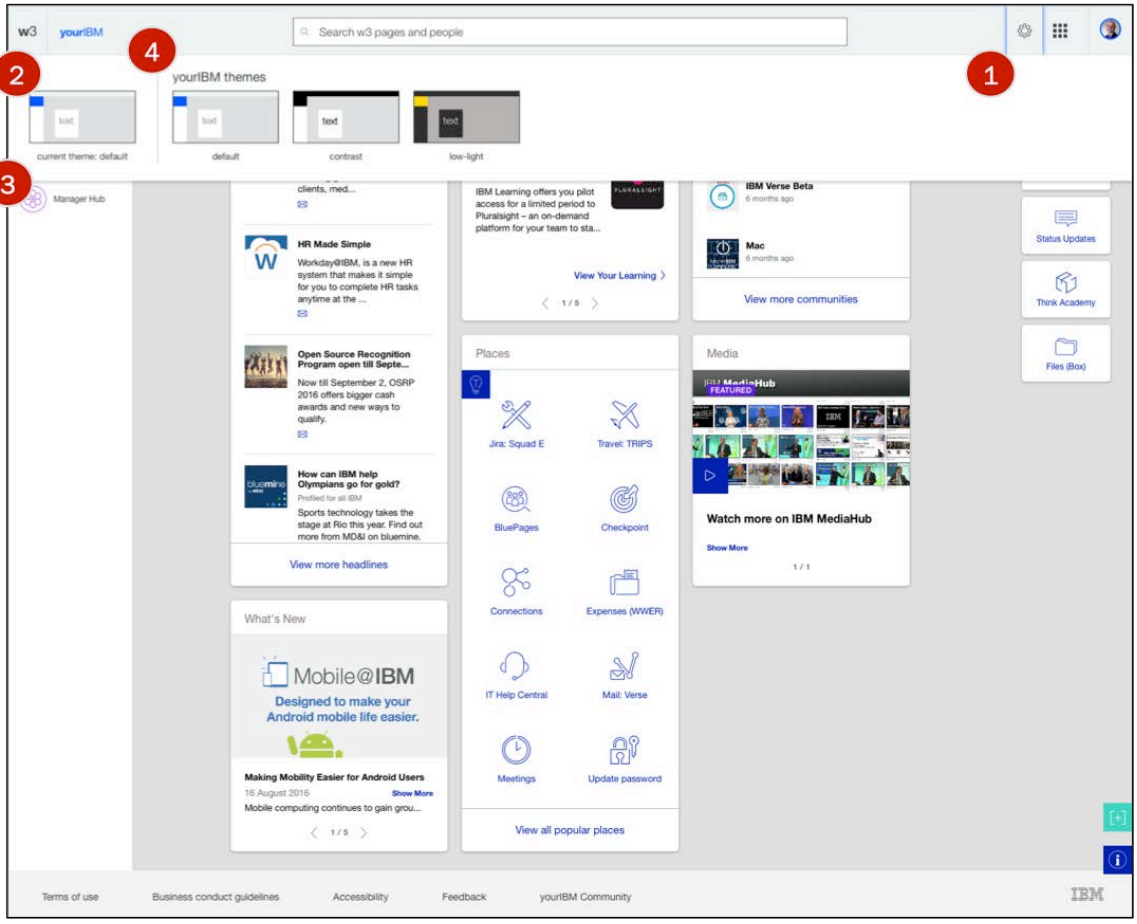


Image 73. IBM Intranet Themes. Themes let employees choose a look that appeals to them. *IBM_10_Theme_Switcher.png*

Themes Highlights

Employees can also choose from three different color schemes for yourIBM: *default*, high *contrast*, and *low light*. After the intranet's initial launch, some users said that the default theme wasn't providing sufficient contrast for them. The team therefore created and deployed the high-contrast theme within two weeks of launch.

The theme options can make the pages easier to read in environments that are very light or very dark. While offices typically have a controlled light setting, w3 is responsive and thus usable on mobile devices almost anywhere. These themes can be especially helpful in certain field settings.

1. **Gear icon:** The gear icon opens the "drawer," which includes the customization options for choosing a theme for yourIBM.

The current theme is easy to determine because of the following traits:

2. **Order:** It appears first.
3. **Clear label:** The icon is clearly labeled *current theme*.
4. **Distinct:** The current theme is separated from the other available themes by a vertical gray bar.

IBMer Hub

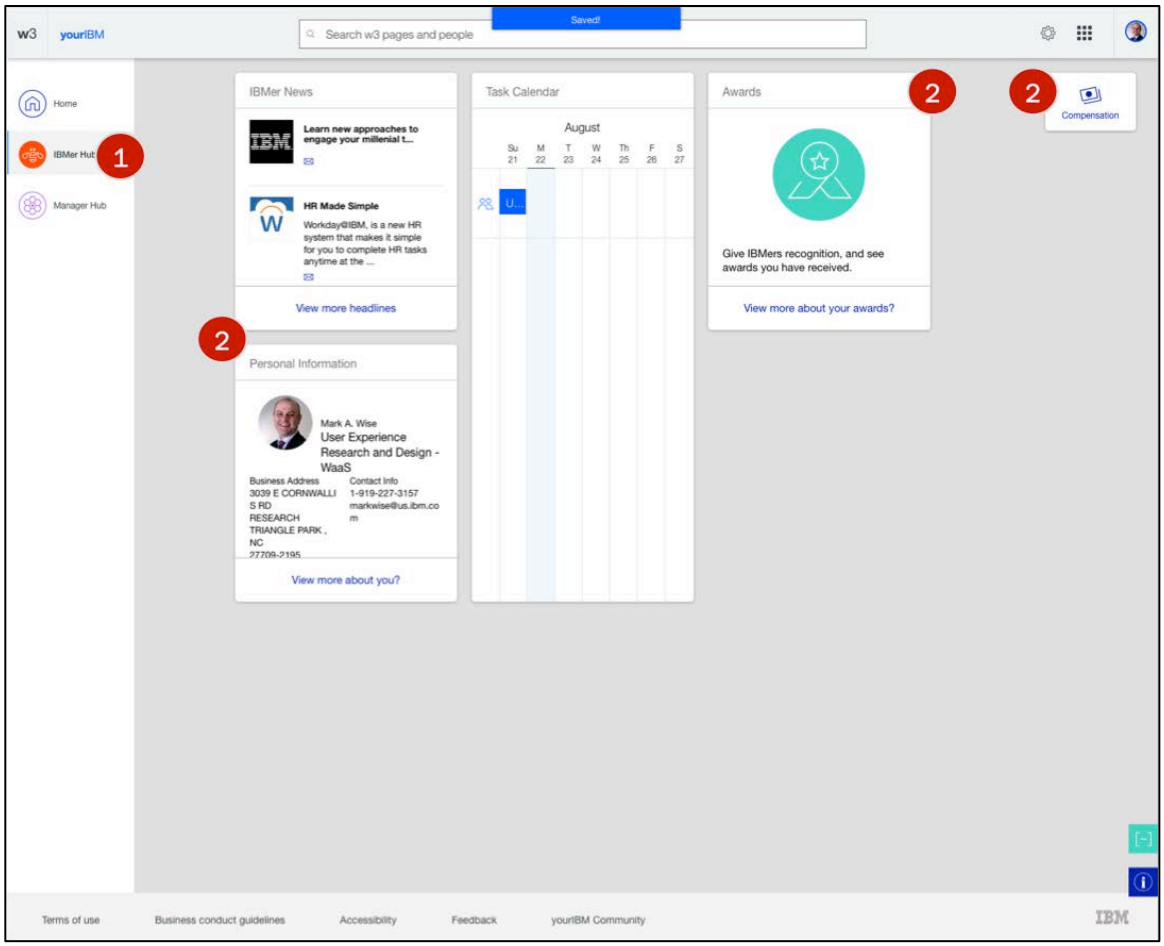


Image 74. IBM Intranet *IBMer Hub*. Career-related information remains ever accessible via the *IBMer Hub* icon in the upper left.
IBM_11_IBMer_Hub.png

IBMer Hub Highlights

A clear career path is one key to happy employees and high retention. To ensure that all employees have access to career planning information, the *IBMer Hub* icon is always available in the upper left of yourIBM.

1. **Selected section.** The selected icon in the upper left appears with a gray background, while unselected sections have a white background. This helps keep users grounded in their current intranet location.
2. **Career and private topics.** Cards display career-related sections, such as *Personal Information*, *Compensation*, and *Awards.* These cards show private profile information that can be displayed only to the employee and his or her manager.

Manager Hub

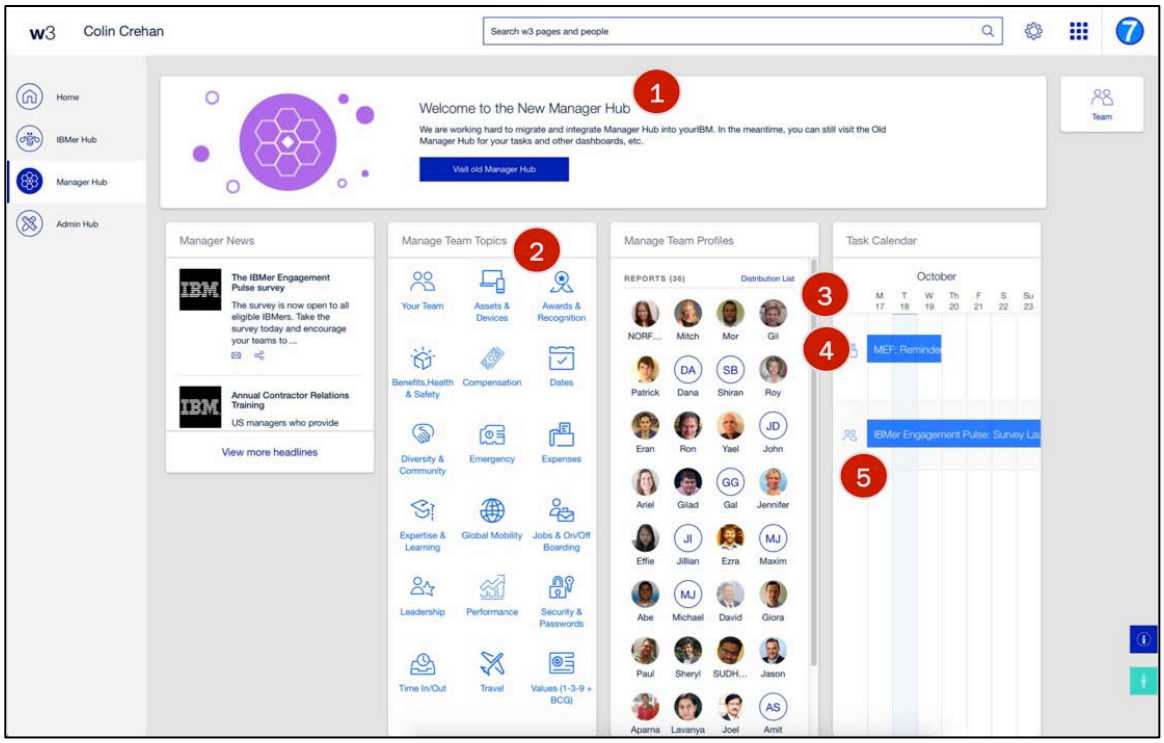


Image 75. IBM Intranet *Manager Hub*. The page immediately informs employees that the hub is a work in progress, and it includes a link to the existing tool, which employees should use. *IBM_12_Manager_Hub.png*

Manager Hub Highlights

Research led directly to the creation of the Manager Hub. When conducting interviews with managers from a company that was acquired by IBM, the team found that these managers were experts in their field, but were lost in IBM because the digital experience was too diverse and fractured. The team set out to create a more unified workplace experience, where managers and employees could find the data, status, tools, policies, and programs they needed to be effective and efficient at IBM. Thus, the Manager Hub was born.

1. **Respectful.** The message tells users that the team is working on the section, and that they are working hard.
2. **Helpful.** Users are provided with links to the areas that will help them do their tasks.
3. **Integrated and unified.** The system reaches into several back-end systems to give users important summary data in a single, unified experience.
4. **Personalized and private data.** Authenticated users see their own data and that of their team. When managers and employees are located in different countries, data is sometimes masked to comply with a country's privacy laws and customs.
5. **Inherited.** Programs and their due dates are inherited through the user's management chain. In this way, an IBM organization's executive can create, alter, or opt-out of a program (such as Salary Planning Cycle, Performance Assessments, or Mandatory Learning).

Global Navigation Menu

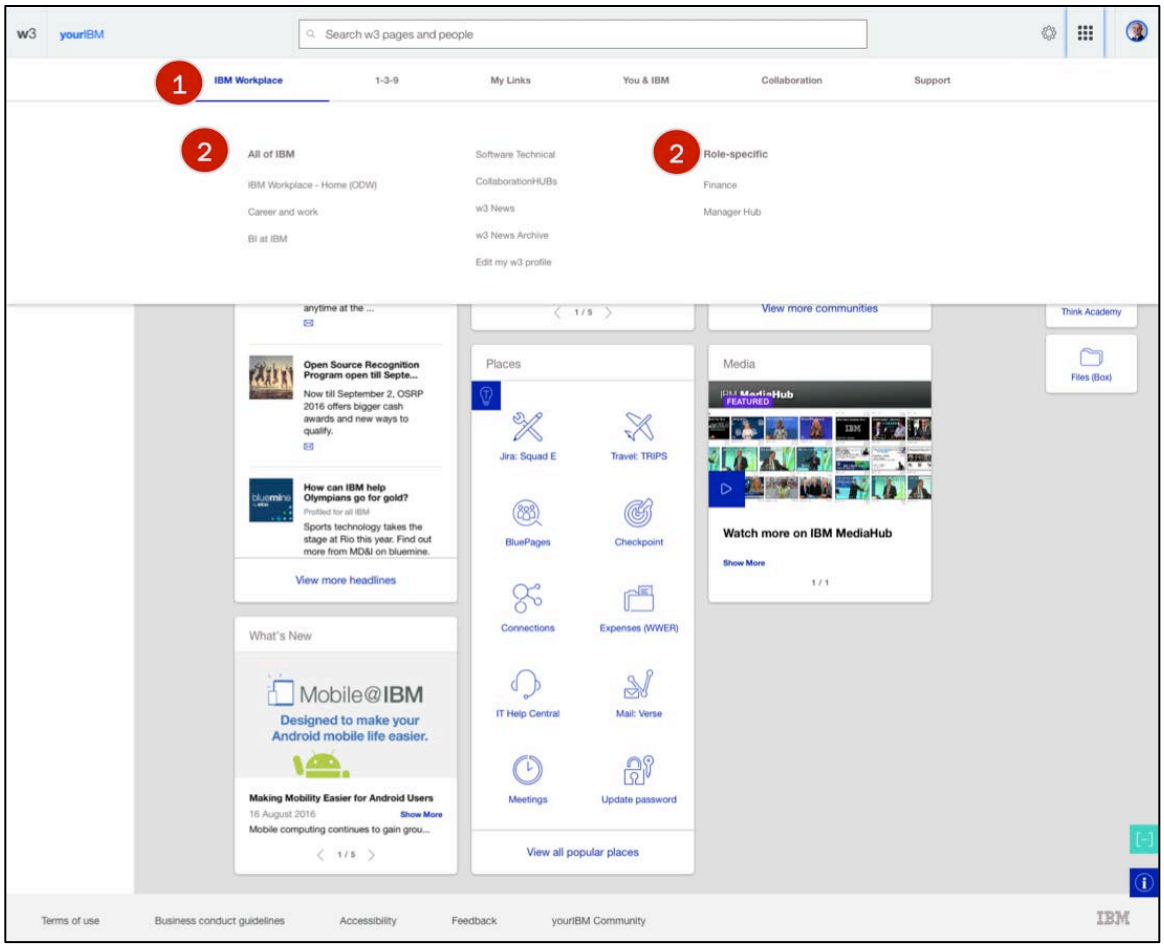


Image 76. IBM Intranet Global Navigation. Users may access the menus to the rest of the intranet via the icon in the upper right. *IBM_13_MegaMenu.png*

Global Navigation Menu Highlights

While so much is available in yourIBM via the icons in the upper left, users can also access additional information on w3 by choosing from suggested commands in the megamenu.

1. **Selected status.** Displaying the selected intranet area is a helpful way-finding cue. For example, the selected menu item changes from standard black text to text that is blue, bold, and underlined. Although the design is elegant, the text types are different enough to be noticeable and helpful.
2. **Commands for one role or all roles.** Headings in the menu specify which links are for everyone at IBM, and which are personalized to the logged-in user. This is particularly helpful when employees collaborate or look for support when using the intranet. When the design is highly personalized and customized, the intranet may look entirely different from one user's desktop to the next; indicating which commands are for all employees and which are for the logged-in user helps people recall (or realize) why their menus look different from those of their colleagues.

DESIGN PROCESS AND USABILITY WORK

The IBM team was fortunate in ways that many intranet teams are not. They started this redesign with a treasure trove of data that had been tracked across various intranet incarnations over the years. The company regularly monitors user feedback and performance in many ways, including the following:

- IBM Digital Analytics to monitor user behavior
- An IBM *Connections* user community for sharing, discussing, and rating ideas
- In-page ratings, interrupt surveys, and polls
- Quarterly IT surveys that span a host of topics
- *Employee Jams* — occasional online events in which IBMers engage in discussions in moderated forums

Thus, as an organization, IBM is fairly data-rich in what it knows about its intranet. Yet, if anything, it does not always manage to take full advantage of that available data. When it comes time for a redesign, however, the team has many tools to help focus its efforts.

Satisfaction and Usage Data

Both yourIBM and BluePages were significant evolutionary improvements to the prior intranet systems used within IBM. The teams had an extensive amount of existing satisfaction and usage data, as well as feedback on the prior systems collected through the following means:

- Large-scale employee surveys
- Direct interviews with specific user populations (including sellers, architects, managers, and administrative assistants)
- Individual usability evaluations

These activities yielded actionable data on user pain points and desired new features. For example, collected data helped the team decide how to organize information on the sites, identify new use cases, and help prioritize the feature-deployment order.

In addition to observational and other objective data (such as completion rates and error-free rates), the team also relied on subjective data, such as standardized satisfaction questions, System Usability Scale (SUS), and Net Promoter Score (NPS), to evaluate mockups, prototypes, and deployed code.

Design Approach

Landing on the correct IA approach was an emphasis of both the yourIBM and BluePages projects. A good example that illustrates the team's approach is the question of how users might want to search for and use an employee profile. Through a variety of techniques, including those mentioned above, the IBM team knows that users typically conduct one of the following three types of people searches:

- Find someone I know, typically by name

- Find someone I only somewhat know
- Find someone I do not know — that is, the "needle in the haystack"

Users are typically looking for different types of information in each of these searches. For example, many users search for someone they know personally so they can contact them or find their manager or backup. In contrast, they may search for someone they do not know well because they need to know about the person's job responsibilities or place in the organizational structure. Finally, they may search for someone they do not know when looking for certain skills or a given role within IBM (find someone in Chicago site operations, for example).

One of the primary design directions for BluePages was to progressively disclose information to users, given the variety of uses identified for an employee directory. Survey data helped identify the most frequently sought profile data. Survey data was contextualized and better understood through direct interviews with users. Design and IA decisions were validated with sponsor users, as well as a broader sample of users through usability evaluations. The following examples show how the team applied this data to its design decisions:

- **BluePages search results.** Through the iterative process described above, search results are available in both grid and mini-grid modes, which include the following data:

Grid (default)	Mini Grid
• Name • Photo • Job responsibility • Business unity • Work location (city) • Office phone number • Mobile phone number • Email address • IBM Notes address • Administrative assistant	• Name • Photo • Job responsibility

  Users can toggle between these views, allowing them to view either more data or more results. In both modes, users can navigate easily to an employee's full profile, or expand an individual result into a quick view that displays all of the grid result data, along with

  - Serial number
  - Employee type
  - Work location (building, floor, and office)
  - Important contact information (such as, "I work onsite at a client location. If I am unavailable, please contact Jane Doe")

    - Team information (leadership, peers, direct reports)

  As the name suggests, the quick view successfully enables users to access the most frequently sought information, beyond basic contact details, and without having to open the full profile.

- **BluePages profile.** The BluePages profile is organized into cards, and each card is further organized into sections and individual data elements. The organization of this data was based on the priority that users gave the data, as well as relationships among data. The initial release included the following cards:
    - Header (unlabeled)
    - Contact
    - Team
    - Department/organization

  The team subsequently added the following cards, deployed based on the priority of the data:
    - **Disclaimer:** displayed on the profiles of non-employees, such as vendors and contractors
    - **Assistant to:** displayed on the profiles of administrative assistants
    - **Expertise**

  Additional cards are planned and will be added to the profile over time, including a *Projects* card and a *Social Networks* card. As additional cards are added, a simple set of sticky anchor links will be displayed on the profile to facilitate discovery and quick navigation to the desired profile content.

Agile Sprint Cycles

The company follows an Agile process, and typically plans on a three-month release schedule. At the start of a release, the team holds a planning session to understand and discuss the *hills* — an IBM Design Thinking term for clearly stated and measurable goals that the team commits to achieve. Often, team members will have completed initial designs before (or even during) the planning session. Then, they conduct "sprint 0."

Sprints are typically two-week spans, during which team members identify specific stories[2] (user-focused Agile requirements) to accomplish. During sprint 0, they create more designs and get interlock on the direction of the release. The user research team takes early wireframes and evaluates them with users, who provide

[2] In Agile terminology, **stories** are "an Agile requirement, stated as a sentence or two of plain English. A user story is often expressed from the user's point of view, and describes a unit of desired functionality." Source: http://agiledictionary.com/277/user-story/

feedback. (For example, the research team's latest focus is accessibility.) The team takes that user feedback and begins running standard sprints, during which the design team might do spikes[3] to further refine designs or work directly with the developers coding the solution. Once they have a solution coded, the research team either evaluates it with users again or launches the item to a limited group of users. (The IBM framework gives the team fine control; for example, the team can release a new feature to users whose IDs begin with the letters A–C.) If the solution is successful, team members decide whether to focus future sprints on other items, or build new stories to further improve the newly released feature.

"In terms of priorities, this can be tricky," says Ed McFadden, User Research and Design Lead, "as there are many stakeholders, problems to solve, and user ideas. As a group, we tend to identify possible hills, with management providing business direction. Then, within a release, product owners set priorities for stories that span sprints. Typically, we prioritize in favor of items that we believe will have the most impact to the greatest number of users."

A Unique Approach to Usability Testing

The IBM team adopted a unique approach to usability testing, which has been an integral part of its design and development efforts. The team has a dedicated user research scrum team that has a backlog of user research activities. New user research activities are conducted in three- to four-week sprints, with users pulled randomly from a database of more than 2,200 usability test volunteers from across the globe. Each round of user testing includes one-on-one testing with participants and parallel survey-based activities. The user research team includes five experienced usability professionals from India, China, and the US.

Adoption and Buy-In

Adoption of the new systems has been very successful. The yourIBM homepage is now the only homepage used by employees. It has been very well received as an entry point for the IBM intranet — both via search and browsing techniques — and is becoming a place where users can complete tasks, such as logging completed learning activities, without having to access a unique page or tool.

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[3] In Agile terminology, **spike** is an "an activity intended to gather information necessary to reduce the risk of a technical approach, better understand a requirement, or increase the reliability of a story estimate." Source: http://agiledictionary.com/209/spike/

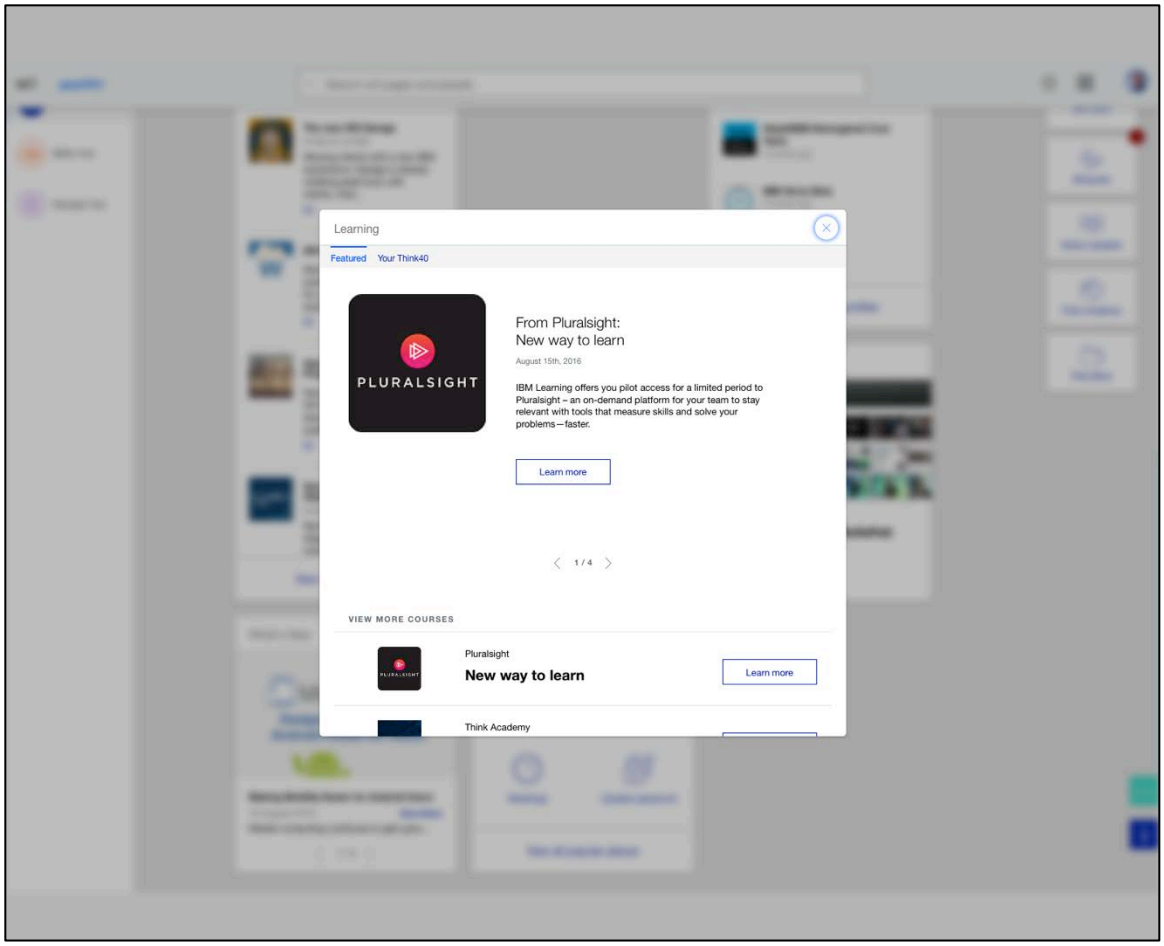


Image 77. IBM Intranet *Learning* Card. Users can open the *Learning* card to explore new learning options. *IBM_14_Learning_expanded.png*

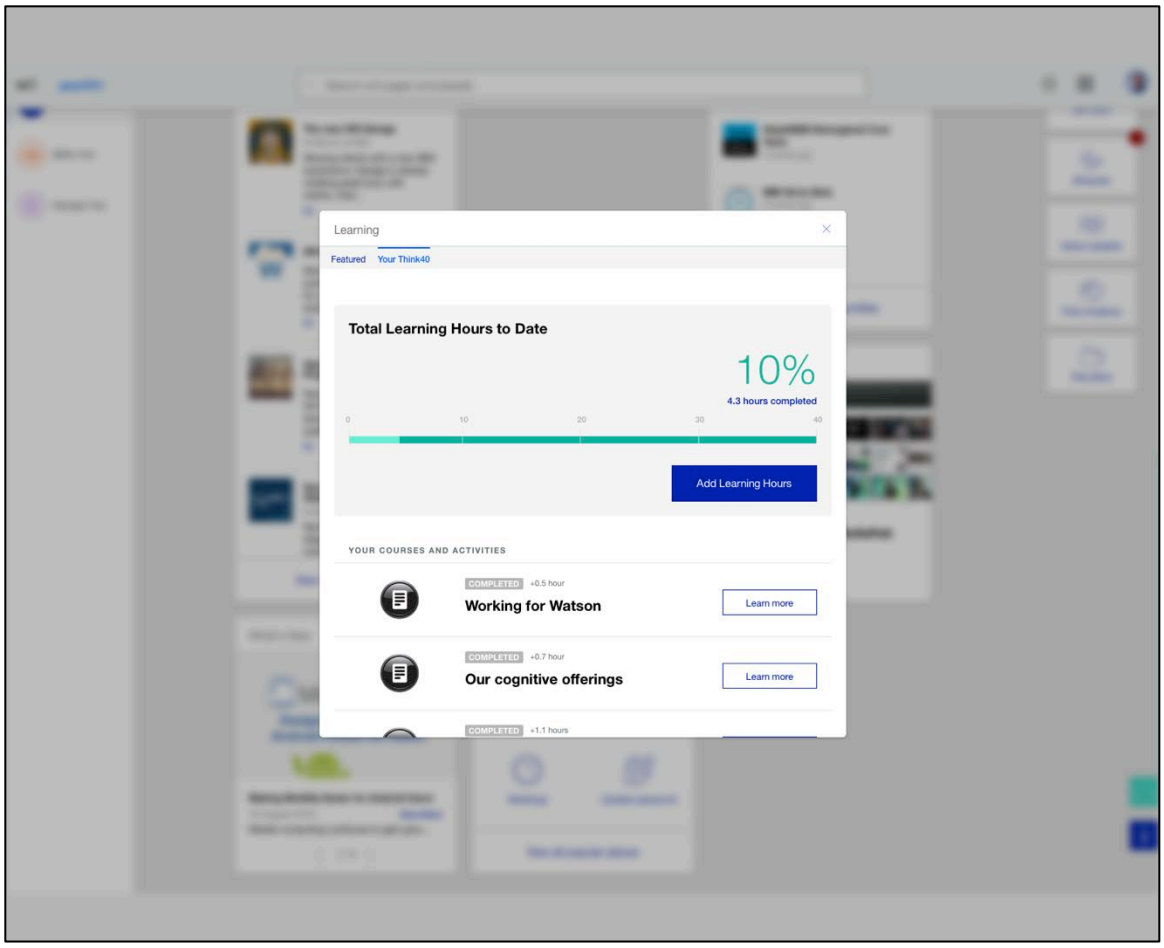


Image 78. IBM Intranet *Learning* Goals Progress. Within the expanded *Learning* card, users can click *Your Think40* to review their progress against their annual learning goals. *IBM_15_Learning_Hours.png*

BluePages has also been successfully adopted. Even though the prior version continues to be available until all remaining profile data is migrated to the new system, most users choose to use the new BluePages. Reasons for this adoption include its significantly improved search performance and results quality, as well as improvements to the overall UX — in terms of both visual design and usability.

Despite the enthusiastic adoption of yourIBM and BluePages, the team noted that the rapid rate of significant updates left some users unaware of new features. To address this, the team added a *What's New* card on yourIBM. This prominent card highlights updates to these and other internal IBM systems, and offers links to lengthier blog posts or news article for users wanting a more detailed description of new features.

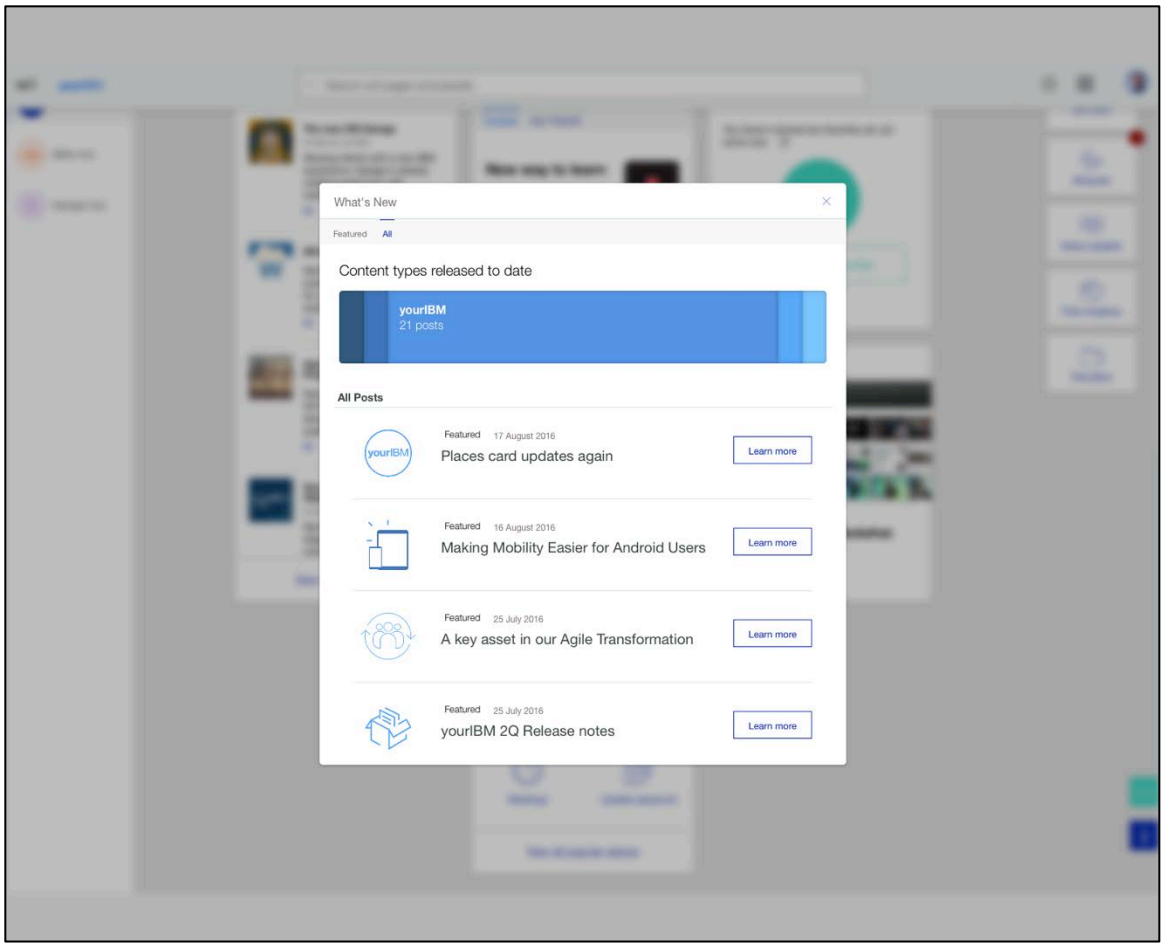


Image 79. IBM Intranet *What's New* Card. Users can open the *What's New* card to learn about the latest changes to yourIBM as well as changes to other tools and resources for IBMers. *IBM_16_What's_New_Expanded_Archive.png*

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
VSA Partners, Inc. Consultancy providing interconnected, cross-channel branding and communications solutions	VSA supported IBM in the design and development of the yourIBM Intranet experience. In partnership with the IBM team, VSA provided graphic and UX design, branding, writing, technology, communications, digital, and other services and deliverables.

GOVERNANCE

The Workplace as a Service domain (a department within the CIO) owns intranet strategy and experience, and partners with organizations across the company (such as Corporate Communications and Learning) to create a holistic and meaningful experience for IBMers. The team recognizes that no single group can be responsible for, or successful at, creating a comprehensive, highly usable and useful global intranet experience — especially for a company as large and varied as IBM.

It is crucial that the Workplace as a Service owners be tightly integrated with the company's internal strategic partnerships, external vendor partnership with VSA, and user feedback as it envisions and delivers a great intranet experience. Collaborating equally and effectively across the varied (and sometimes competing) strategies and objectives of the business is not without challenges. The team therefore united around the ideal that a successful intranet experience should:

1. Succeed at supporting the needs and wants of IBMers today
2. Have a clearly defined roadmap for tomorrow
3. Build on a framework — both literally and figuratively — that enables agility, encourages course correction, and increasingly provides partners with ways to play more active, integrated roles in crafting the experience

Although having as many contributors to the intranet as IBM does has many positive aspects, it can sometimes lead to debate and strategic conflict. For example, one party might aim to give users what they need, while another focuses on executive messaging. To help manage these challenges, the intranet team depends on user reviews, metrics monitoring, and its Agile approach.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Workplace as a Service (WaaS) CIO team	• Provide UX design and evaluation, front- and back-end development, architecture, Organizational Change Management (OCM), hosting and deployment, governance, and manager and stakeholder support • Manage the UX, technology, and deployment; content is fed through APIs and JavaScript Object Notation (JSON) files from numerous sites across the intranet
Communications Team	• Create content displayed through channels on yourIBM and partner with the yourIBM CIO team on all announcements and communications showcasing IT-related information for all IBMers, from simple banners to company-wide "Signature Moments"
Intranet Site and Content Owners	• Provide access and APIs to site information that can be displayed on yourIBM

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	w3.ibm.com (desktop and mobile)
Default Status	IBMers can set any page they wish as their homepage, but yourIBM is the one-and-only IBM intranet homepage, replacing all previous homepages. The one exception is for Quebec employees; because they require French Canadian translation, they are currently directed to the previous homepage. (Although yourIBM is itself translated, the content displayed within it is pulled from across the intranet, and the yourIBM team cannot yet guarantee that source content is appropriately translated.) IBM does not override browser settings, or push or bookmark any sites. Instead, the company supports users' choices of OS and browser. Only when IBMers actively access the IBM intranet will they land on yourIBM. (New laptops' browsers are typically set with w3.ibm.com as the homepage, however.)
Remote Access	IBMers can access yourIBM — or any intranet page — only from the corporate VPN (desktop) or a BYO device or corporate managed phone with the appropriate Mobile Device Management (MDM) access.

TIMELINE

PROJECT MILESTONES: YOURIBM	
Milestone Date	**Milestone Description**
Pre-2000	**Early days:** The intranet evolved from a list of corporate-wide links and news items to a page featuring news items matching IBMers' unique profiles, along with an employee directory (BluePages). The team also introduced some standard design and navigation elements that were common at the time.
2000–2002	**w3 Home, versions 5–7 added:** • User profiles • Dynamic content • Enterprise taxonomy • Integrated search
2005–2006	**On-Demand Workplace added:** • Business portals • Enhanced personalization • Role enablement (content directed towards IBMers filling specific job roles)
2011	**IBM Workplace** • Primarily a theme and technology update
August 2013	**Lightweight homepage** • A simple, stripped down version of the homepage focused on a few primary tasks, with fast response and no downtime • News and links • Some personalization • Productivity and support widgets in masthead
March–October 2015	**yourIBM (current release) added:** • Richer content and an updated UX • Cards-based design offering different user views into content, depending on the user's needs • A technology framework that other IBM teams can leverage

PROJECT MILESTONES: BLUEPAGES	
Milestone Date	**Milestone Description**
Pre–1996	• **The Dark Ages:** IBM used a command line VM employee directory
1996	• The original BluePages deployed as a relatively basic web-based employee directory
2003	• A significant BluePages redesign, which created a more expansive employee profile
December 2014	• A new iOS BluePages mobile app deployed
January 2015	• A new Android BluePages mobile app deployed, followed by numerous updates for both iOS and Android throughout the year
May 2015	• Tablet version of BluePages mobile app deployed
October 2015	• The first major update to the BluePages website in more than a decade is officially deployed
2016	• Several releases throughout the year, adding additional functionality, profile data, and design enhancements



Image 80. IBM Intranet Evolution. The IBM intranet's evolution over time, from the green screen era (VM) to dynamic content and integrated search. Images of this evolution timeline continue below. *IBM_17_Homepage_timeline-part-1.png*

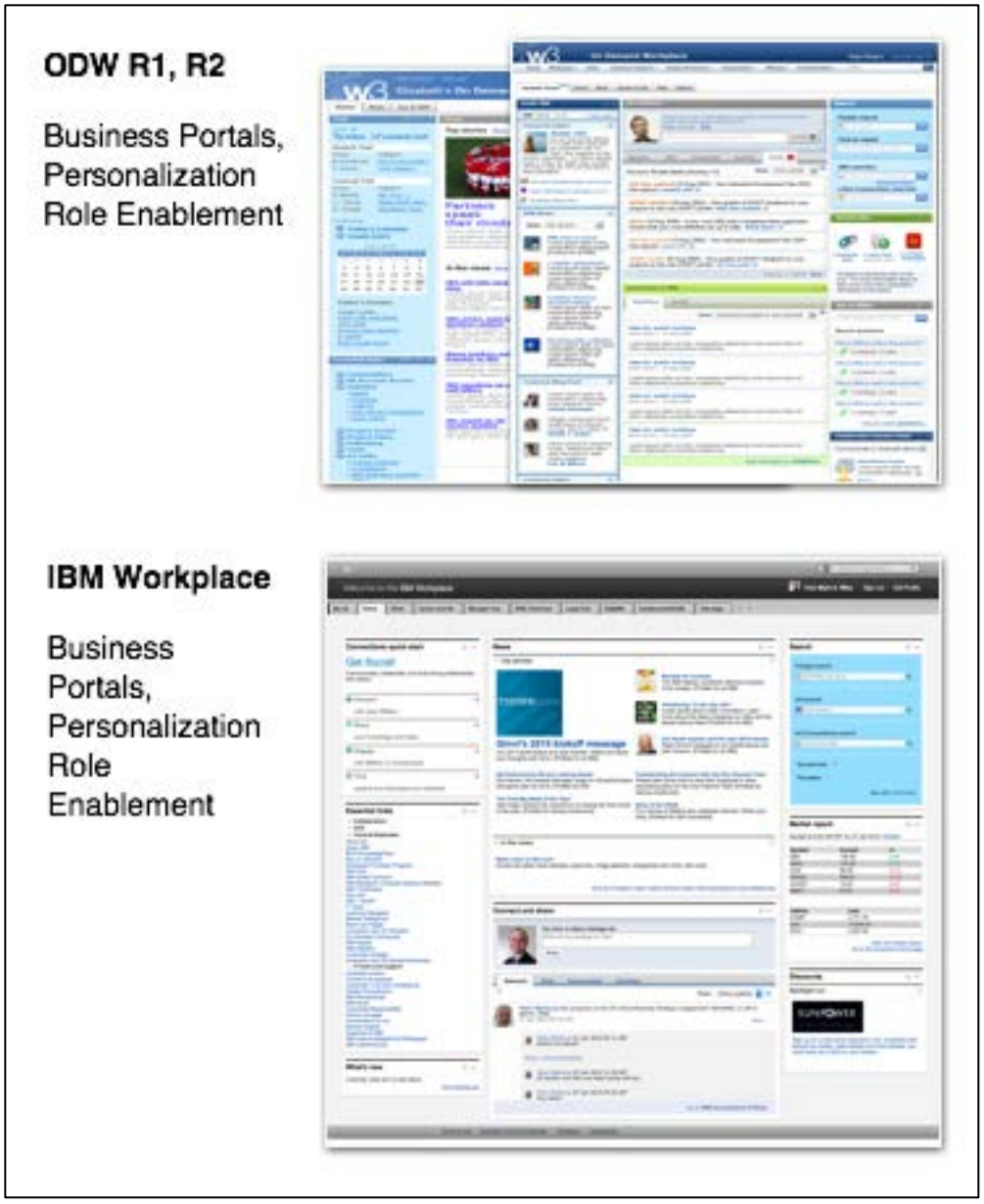


Image 81. IBM Intranet Evolution. The IBM intranet's evolution over time, from On-Demand Workplace to the IBM Workplace upgrades, both of which emphasized business portals and personalization. *IBM_18_Homepage_timeline-part_2.png*

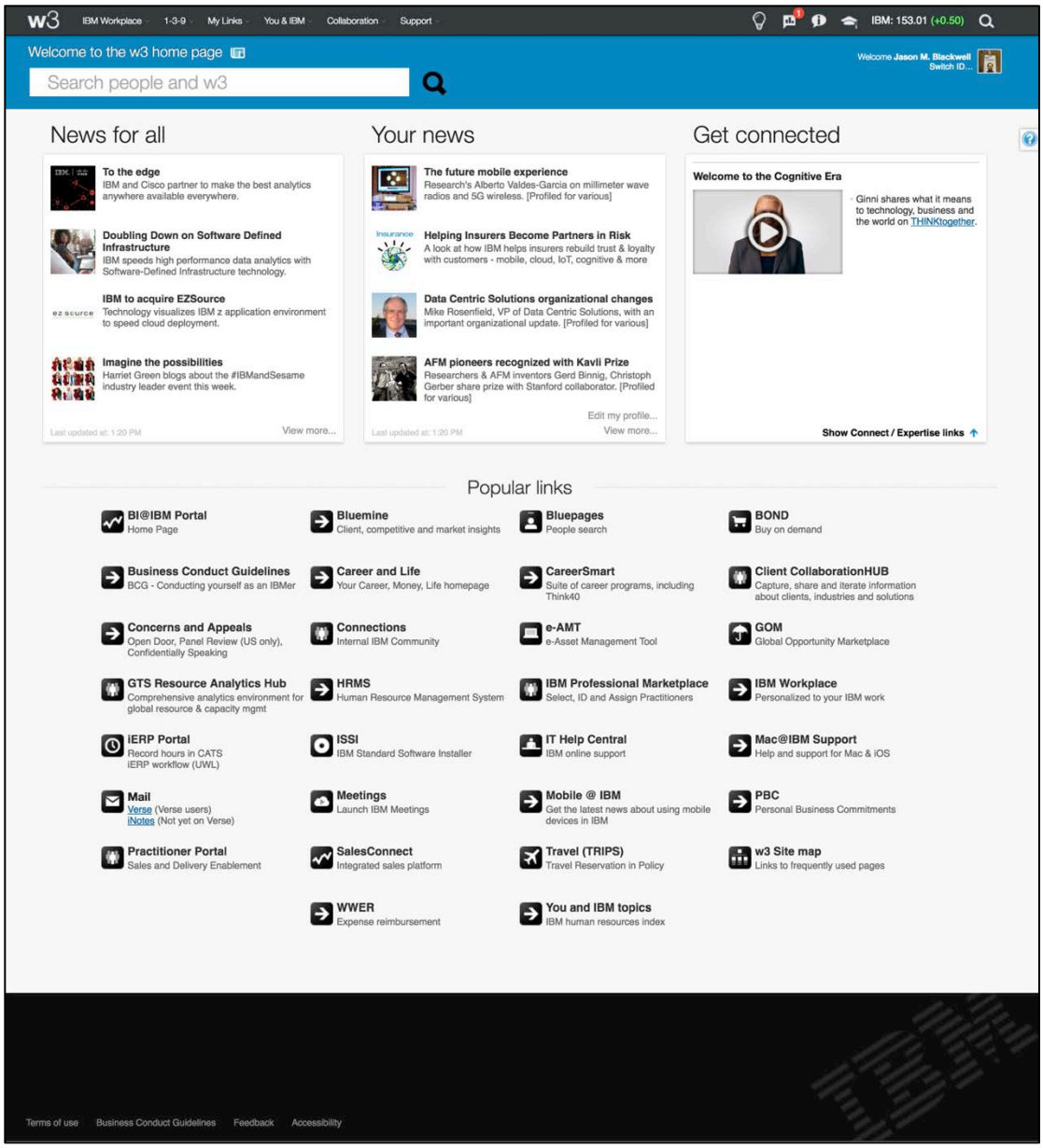


Image 82. IBM Intranet Old Homepage (Lightweight Version). This lightweight homepage is the most recent previous version of the IBM intranet, released in August 2013. *IBM_19_previous-version.png*

CONTENT AND CONTENT CONTRIBUTORS

The IBM intranet (w3) has many types of content, including

- Corporate communications
- Enterprise content
- Private content
- Social content

The following outlines how each type of content is managed.

Corporate Communications

yourIBM provides several touch points for communicating content to IBMers. IBM Communications controls the intranet news feed, so the news can have the most impact with IBMers. Wherever possible, stories are scheduled on a calendar — profiled by industry, job role, location, and interest — and reviewed to prioritize importance.

The yourIBM site supports several communications channels. Up front, there are cards for news headlines, media, and "What's New." Headlines also appear on IBMer Hub (employee-specific news) and Manager Hub (manager-specific news). Because yourIBM knows who visitors are, content is profiled to match users and their registered interests.

The *Headlines* card is fed traditional IBM news articles, as curated by the corporate communications organization. The *Media* card does the same, for non-article communications, such as videos. The *What's New* card started off speaking to IBMers only about how the yourIBM site itself was growing and changing, but has become a useful channel to speak about changes in the wider IT toolset and offerings.

Like a newspaper front page, the constraint of a limited set of yourIBM cards helps the Communications team on both ends in two key ways:

- **It consolidates value** in a known area, so users can scan and consume valuable messages in a single location.
- **It provides a brake** against a tidal wave of messages that might come from the hundreds of tool and process owners, each of whom wants his or her message sent to all of IBM. The Communications team can and does say no to lower-priority messages, but these can be shared in Connections communities, blogs, newsletters, and other targeted channels.

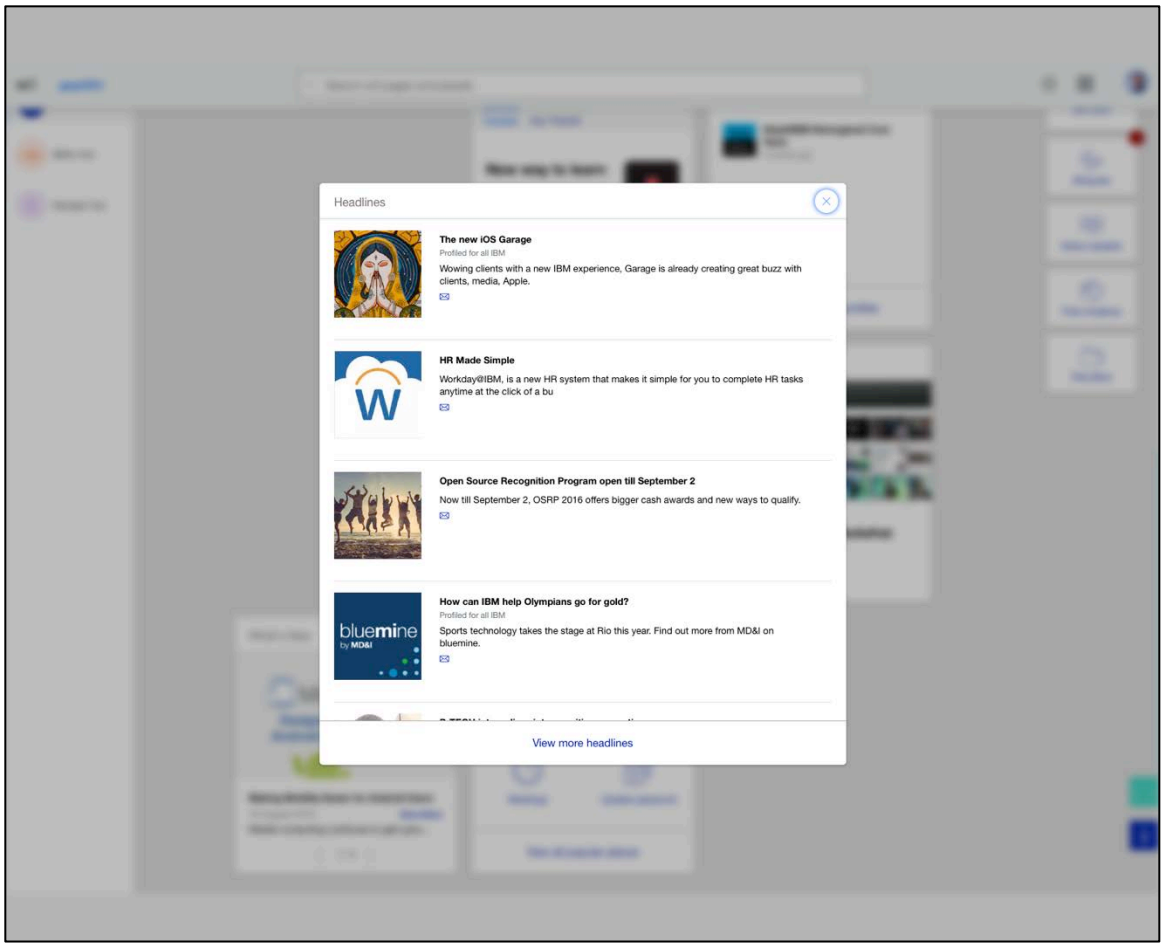


Image 83. IBM Intranet *Headlines* Card. Users can open the *Headlines* card to view all recent news on the IBM intranet. *IBM_20_Headlines_Expanded.png*

Enterprise Content

IBM is a multinational corporation with many business units, scores of companies around the globe, and hundreds of thousands of employees — not to mention vendors and contractors. As such, it has hundreds of content owners. Formal policies and programs have official owners with auditable content trails, while a large body of less formal content is typically shared more socially in Connections communities, wikis, and so on.

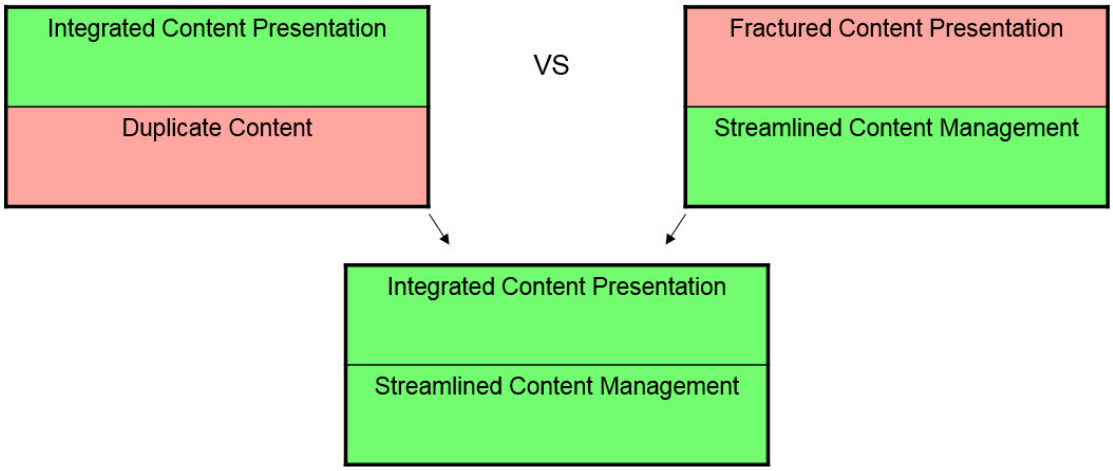
Culling Enterprise Content

A good example of how enterprise content is culled is to look at how IBM manages HR content. When the team first started reducing HR content, it had more than 169,000 HR pages; once it finished pruning the duplicate, defunct, and unnecessary content, there were fewer than 25,000 HR pages left. On the face of it, such numbers make it seem like the effort was a huge win for the organization and for the intranet. However, if you scratch the surface, the cracks begin to show.

With IBM employees located across the globe, some HR content was global, some regional, and some local. When team members tried to create a single, integrated site for each employee population, they unintentionally created a massive duplication of global and regional content, which then fell out of sync and required considerable effort to correct and maintain.

When they segregated content by area, however, they left employees with a very fractured experience. To find applicable policies and programs, an IBMer in the Czech Republic might have to go to several sites: the Czech HR site, the Central European HR site, the main European HR site, and the Global HR site. The team then sought to fix this through user profiling.

"We cut the Gordian Knot and created a content integration system that would allow us to manage the content in segregated sections, but integrate them into a single HR site based on user profiling," says Colin Crehan, Strategy and Design Lead, yourIBM.



This diagram illustrates how the IBM team took a layered approach to content integration, so that content was aggregated, yet accessible, based on user profiling.

Content must be managed on several layers that are largely independent, but related. By focusing on the problems in each layer, the team was able to make tremendous progress. The UX team owns layers five (Content Organization and Navigation) and six (Content Presentation and Consistency), but works with other layer owners to address user and usability issues.



This diagram outlines the content layers behind the IBM intranet.

"We have been experimenting with less formal content creation," says Crehan, "where a single person can be owner, author, and content publisher. This works for many kinds of content, but appears to lead to problems of accuracy, auditability, and content proliferation. As such, we have avoided this model for our core, formal enterprise content in many instances."

Enterprise Content Governance

IBM had a culture in which creating content was easy, but removing content was difficult. The company's shift in culture allowed it to reverse this trend by applying the following mechanisms:

- **Governance Board.** This small board is headed by a representative of the global process owners, but includes usability experts and webmasters. The board strives to keep content focused, effective, and efficient. Integration and personalization are key goals that it stresses to teams that come to it seeking to have content added to a site. When content is added, the board asks which existing content should be sunset.

- **Process owners.** Process owners are encouraged to edit and reduce their content areas. Global and local process owners conduct annual reviews, both to ensure that the ownership is correct and clear and to remove stale content.
- **Content jail.** Content of uncertain value goes to "content hail," where it is out of the main navigation structure, but still searchable. Content that continues to have no owner and no users is archived and removed from the IBM intranet.

Private Personnel Content

The yourIBM system knows who you are and can show you private personnel information about yourself (and your team, if you are a manager). All private data is stored by trusted sources in their back-end system of record. Data services provide private data to authenticated users (via single sign-on). Data masking ensures that managers can see only the data of employees on their team, and only then if the employee lives in a country whose privacy laws allow it.

Social Content

The yourIBM system can also highlight social content, which is managed on IBM Connections, and allows IBMers to follow streams or be tagged in discussions in Connections forums, wikis, activities, files, and other Connections spaces that support conversation. There is no formal governance of the social content space, though each user can throttle notifications via subscription preferences.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Linux servers: three-node IHS cluster with load balancer for web content, hosted on IBM Events Infrastructure • Two-node WAS Liberty cluster with load balancer for services, hosted on IBM SoftLayer
Bug Tracking/Quality Assurance	• JIRA • Custom monitoring agents to confirm availability • JsUnit • LoadRunner
Design Tools	• Sketch • Adobe Illustrator • Adobe Premier Pro • Zeplin
Site Building Tools	• AWF: a custom-built framework • JavaScript libraries including lodash, jQuery, and Backbone • Automation tools including Grunt, Jenkins, and UrbanCode Deploy • GitHub Enterprise
Content Management Tools	• Enterprise Content Management • JSON files • Custom-built CMS
Search	• Custom-built rapid results system (now a part of AWF) • Moving to Watson Explorer for full search

Technology Evaluation

The team's primary focus with technology was performance and flexibility. The IBM Events Infrastructure was initially built to provide an extremely stable, high-availability environment for key external events. The company opted to provide that same level of performance to its own employees. It also had the person-power to make custom enhancements (such as the AWF framework and custom search

features), which somewhat reduced the evaluation of other solutions. Ultimately, the team created its vision first, then evaluated solutions based on their ability to deliver on that vision and built them as necessary.

The IBM team is very open to trying new tools, both its own and third-party. Team members follow Agile practices, so they often use retrospectives (the Agile term for a meeting held at the end of an iteration) to collect feedback from the team as to a tool's efficacy.

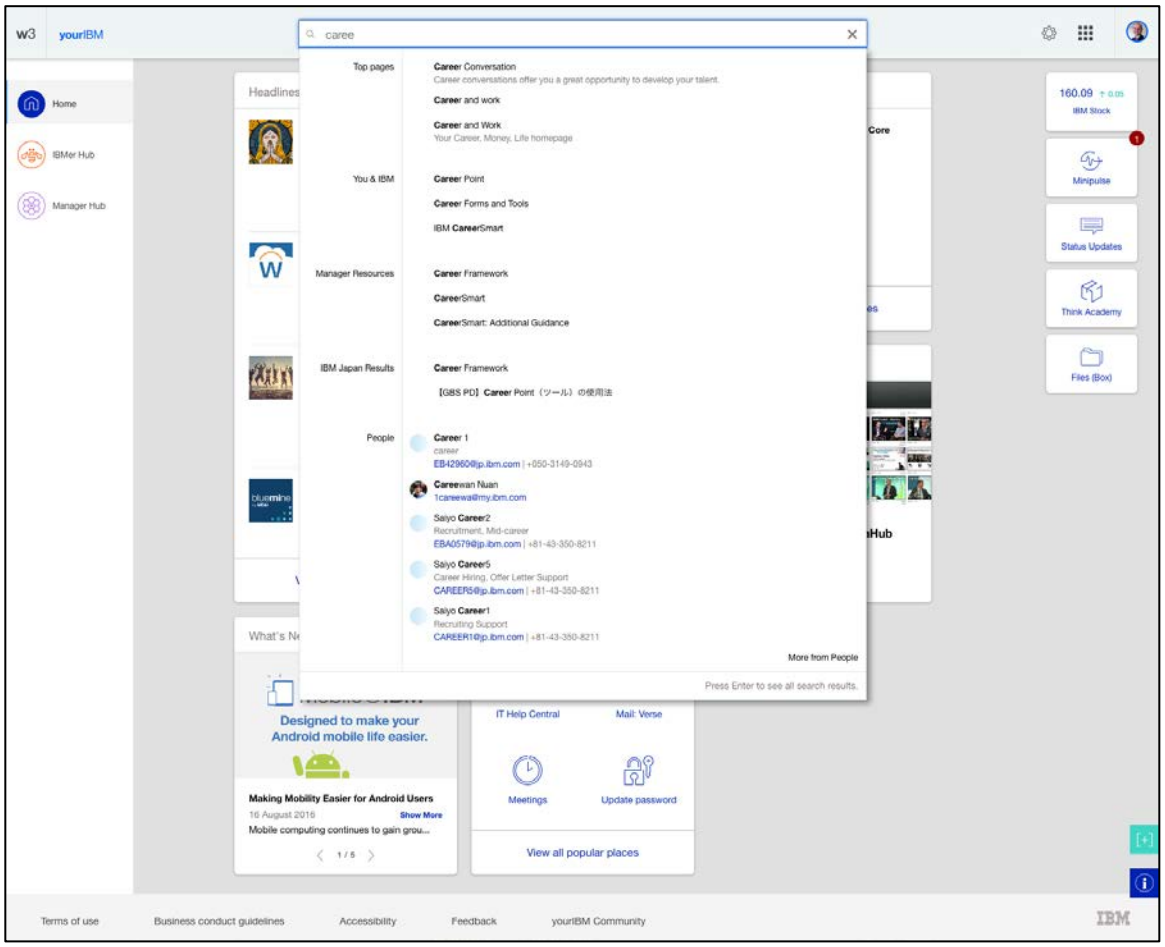


Image 84. IBM Intranet Rapid Results Search. The site provides character-by-character suggestions; here it shows results as a user types "career." Several categories are profiled, including *You & IBM*, providing results specific to the user's country, and *Manager resources*, which appears only to managers. *IBM_21_Search_Rapid_Results.png*

ROI

The yourIBM site is an optional front door to the company's larger w3 intranet, and is meant to increase IBMers' productivity and ability to find their way around the intranet. As such, the basic measures of its success remain adoption (usage) and satisfaction. Individual interactions are studied separately, but following is an overall view:

- IBM has **hundreds of thousands of potential users**, though many are at customer sites and do not have ready access to IBM's intranet at all times.
- The yourIBM site receives more than **14 million visits per month**. There are regularly more than **350,000 visits per day** and more than **2.5 million per week**.
- Although logging in to yourIBM unlocks many valuable features, users are not required to log in at this time. Soon, the team will make logging in both easy and mandatory. In this way, it will provide more powerful features to a wider audience — and considerably improve its ability to track metrics.
- Measured on a five-point scale, overall satisfaction is **74%** (interestingly, on a seven-point scale, it measures at **79%**).

Definition of Terms

- **Visitors:** Measures individual users.
- **Adopter penetration:** Measures total unique visitors out of the total population of users (for example, 350,000 visitors out of 500,000 total users = 70% adoption for that day).
- **Visits:** Measures distinct times that a user enters a site.
- **Views:** Measures the number of page loads.
- **Interactions:** Measures views in which users went beyond looking and started clicking.
- **Overall satisfaction:** Measured through a globally sampled survey.

LESSONS LEARNED AND BEST PRACTICES

Lessons Learned

Because the IBM team uses its Agile retrospectives as opportunities to capture incremental lessons learned, such learning is built into its process. However, in terms of big picture lessons learned — or, as Blackwell candidly acknowledges, *relearned* in some cases — the team offers the following from the most recent redesign:

- **Business owners love big bang changes; users, less so.** "Again, this is more of a relearned lesson. When we did our redesign, we wanted to announce it with some fanfare. For the most part, this worked out well, however, there was a vocal minority who resented the fact that their corporate intranet homepage had changed at all. These users only employed a few basic functions, and resented any sort of change (such as: the link they click all the time is in a new spot). A more modern approach is to introduce changes slowly over time, so users don't experience a sudden major change and you are less likely to hit a favorite function of certain users. Since our release, we've made many changes — some fairly significant — and never got the same type of push back as when we released a 'major change.'"
- **It's easy to not invest enough in stakeholder engagement — it is also easy to invest too much**. "Bluntly, with a company the size of IBM (and with an intranet the size of IBM's), were one to interlock with every party who feels they should have veto power on a new intranet solution, one would never release a new design. Furthermore, we ultimately wanted the focus to be on user needs. That said, stakeholders often have a deeper understanding of their users, needs, and business goals than a single central team can ever have. The net-net is that we likely involved some groups more than we should, and neglected others. Further, I wouldn't say we've necessarily solved this problem — it is an ever-evolving one. Ultimately, however, when in doubt, let your end users break the tie."
- **Integrators need education.** "Related to the above, another lesson we constantly relearn is that not all integrators have the same level of design knowledge or goals that you do. One problem we encounter regularly is those who are seeking a 'prominent presence' or those who view the homepage as a promotional play. The challenge comes in when they don't measure themselves in a way that you'd expect. For example, some stakeholders aren't necessarily driven by traffic to their pages — they may instead feel that they can show progress to their executives if they can show their content has a prominent space. Likewise, it can be a challenge for stakeholders to see the 'big picture' when they are focused on such a narrow aspect of the intranet."

- **Agile development is a culture, a process, and a practice change.** "Early on, we would have claimed to be 'Agile.' And, indeed, we followed the practices. However, it takes a while for concepts like 'fail quickly,' 'what is an MVP,' and the like to truly sink in. We are not done with our Agile maturation, but for those interested in becoming more Agile, the best we can recommend is to simply get started. Our lesson is that some aspects can only be mastered in practicing."

Best Practices

Blackwell also shares a few best practices that other teams can apply to their own intranet projects:

- **Large-scale projects need constant communication.** "When you have a lot of people working, make sure the lines of communication are wide open. We tend to document less now, so the key to avoiding creating something that doesn't look like it fits together is to have open communication."
- **Focus on fundamentals: search, performance, and reliability.** "At times, to create something innovative, we can neglect the basics. Your awesome new collaboration feature won't mean much if your page doesn't load or it takes so long to load that the users give up or will hate whatever they get after the wait. If your page isn't reliable and reasonably fast, you are starting your redesign in a hole. For large intranets, search is the key function that all users will want and want to work well — and fast."
- **Know your user's pain points, and involve them throughout the process.** "Sort of Usability 101, but when you are aiming for innovation and business needs, users can get lost. Everyone on your project should know who your users are (at least in the broad sense), and they should know the pain point for the solution they are currently coding."

JetBlue

OVERVIEW

COMPANY

JetBlue offers flights to 100+ destinations, with free inflight entertainment, free brand name snacks and drinks, lots of legroom, and award-winning service.

Headquarters: Long Island City, Queens, New York, US

Company locations: Latin America, the Caribbean, and the US

Locations where people use the intranet: the US, Latin America, and the Caribbean

Annual revenue: $6.2 billion (USD)

THE INTRANET

Users: All of JetBlue's 20,000+ Crewmembers (employees) and 200–300 vendors (business partners) have limited access to the intranet.

Mobile approach: Responsive web design

Technology platform: Custom PHP-based application

TEAM

Design team: A team of approximately 10 JetBlue team members worked with an agency (Imarc) to ensure the new intranet was on brand, improved internal efficiencies, and met stakeholder expectations. These team members included Corporate Communications, Content Managers, and Work Group Leaders. The Imarc team consisted of approximately 12 people, who worked through the range of project phases — discovery, strategy, UX, visual design, application design, front-end and back-end implementation, systems integration, server setup, and content migration.

JetBlue team members: Sebastian White, Director Corporate Communications; Kate McMillan, Content Manager

Imarc team members: David Tufts, Managing Partner, CTO; Thomas Saraceno, Director of Experience; Marcel Moreau, Lead Experience Engineer; Robert Mohns, Lead Strategist; Jared Laham, Creative Director; Paul Kelley, Lead Designer; Katie Desmond, Partner, Chief Business Development Officer

INTRANET TEAM



Team members shown here (standing, left to right): Jared Laham, Paul Kelley, Thomas Saraceno, David Tufts, and Marcel Moreau; (seated, left to right): Katie Desmond and Jeff Turcotte.

HIGHLIGHTS ABOUT THIS WINNER

Realizing the company culture was alive and well, and that Crewmembers (the company's name for all employees) expected the same fun, creative wordplay on the intranet as they see in the company's public-facing marketing, the intranet team went straight to work. They updated the branding and iterated the design through UX research to derive a simple, responsive site that has more personality than most struggling comedians.

Operations and performance information, news, resources, social, and much more drive engagement, while puns and jokes dot the site. Anyone from a pilot using a smartphone at 35,000 feet to a flight attendant using a tablet while boarding or a Crewmember working a gate and using Citrix on a desktop can be productive and engaged with HelloJetBlue.

Supporting the very strong, positive company culture, HelloJetBlue offers a combination of resources, tools, and news packaged in a friendly, imaginative way. The intranet keeps Crewmembers motivated and firmly grounded, even while soaring above the clouds.

- **Fast.** A slow intranet is a difficult intranet. Some designers focus so much on making an intranet interesting and easy to use that they forget the basics, like performance. HelloJetBlue, however, optimizes for speed.
- **Responsive design.** The same content appears on desktop, phone, and tablet, with small performance tweaks and content reordering to suit a device's screen real estate.
- **Toolbox.** The site personalizes news, social, and even the list of tools that Crewmembers have at their disposal. They use these tools daily to get their jobs done.
- **Custom CMS.** The team built a custom CMS for maximum flexibility. It not only allows content administrators to add content with increased efficiency, but they can also hide the "fun" feature on an article or on the global level to suit pages that include more serious topics.
- **Social features.** Comments, mentions, and likes (in this case called "That's Fly") enable Crewmembers to share ideas, have lively discussions, and support one another.
- **Notifications.** The status bar at the top of the homepage provides important real-time information so Crewmembers can stay in the know.

BACKGROUND

Goals

The project's overarching goal was to create an intranet that would better represent the JetBlue brand and be responsive to the needs of all Crewmembers. The old site was past its prime, and it was simply time to upgrade.

The company also outlined a list of tactical project goals; the new intranet had to provide the following:

- The ability for a small communications team to easily publish content
- Two-way dialogue allowing users to comment on content
- Personalization and targeted content
- A great UX that included dashboards so the intranet team could deliver fresh content throughout the day
- Improved navigation, content organization, search, and tagging
- Single sign-on authentication
- Mobile optimized through responsive web design

Challenges

With goals come challenges, and the JetBlue team tackled many:

- The strategy and development work was separated by a six-month gap due to shifting internal priorities.
- Legacy systems created complex integration issues.
- The project required manual content migration from the old site.
- Hosting and performance requirements were difficult to meet.
- The new site had to go live to 19,000 users without real-world load testing.

Approach

The project team utilized a modified waterfall methodology. It began with an initial discovery and strategy phase that consisted of surveying 2,300 Crewmembers via email and SurveyMonkey, interviewing key stakeholders across departments, and auditing content and functionality. Core team members from JetBlue's agency partner, Imarc, participated in JetBlue University, a new employee onboarding program. This gave the team members insights into what it's like to live in the JetBlue world as a Crewmember. These activities played a central role in informing the team's discovery and fact gathering.

"We wanted to focus on a user-centric design by first understanding the audiences and their daily tasks," says Thomas Saraceno, Imarc's Director of Experience. "After participating with the core team brainstorm and ideation, we tested our UX assumptions against the input of real users. These exercises included: information architecture testing using Treejack, paper prototyping, and hallway testing. Subject matter experts were interviewed and the team crafted personas for all seven work groups."

These personas were effective in highlighting day-to-day activities, behaviors, wishes, and goals. They also helped the team identify and map key touch points to determine how they would relate to mobile device access.



Image 85. JetBlue Intranet Original About the Company Page. It is evident that this page does not communicate the brand to employees in the same way the brand is communicated to travelers.
JetBlue_01_about_page_version1.png

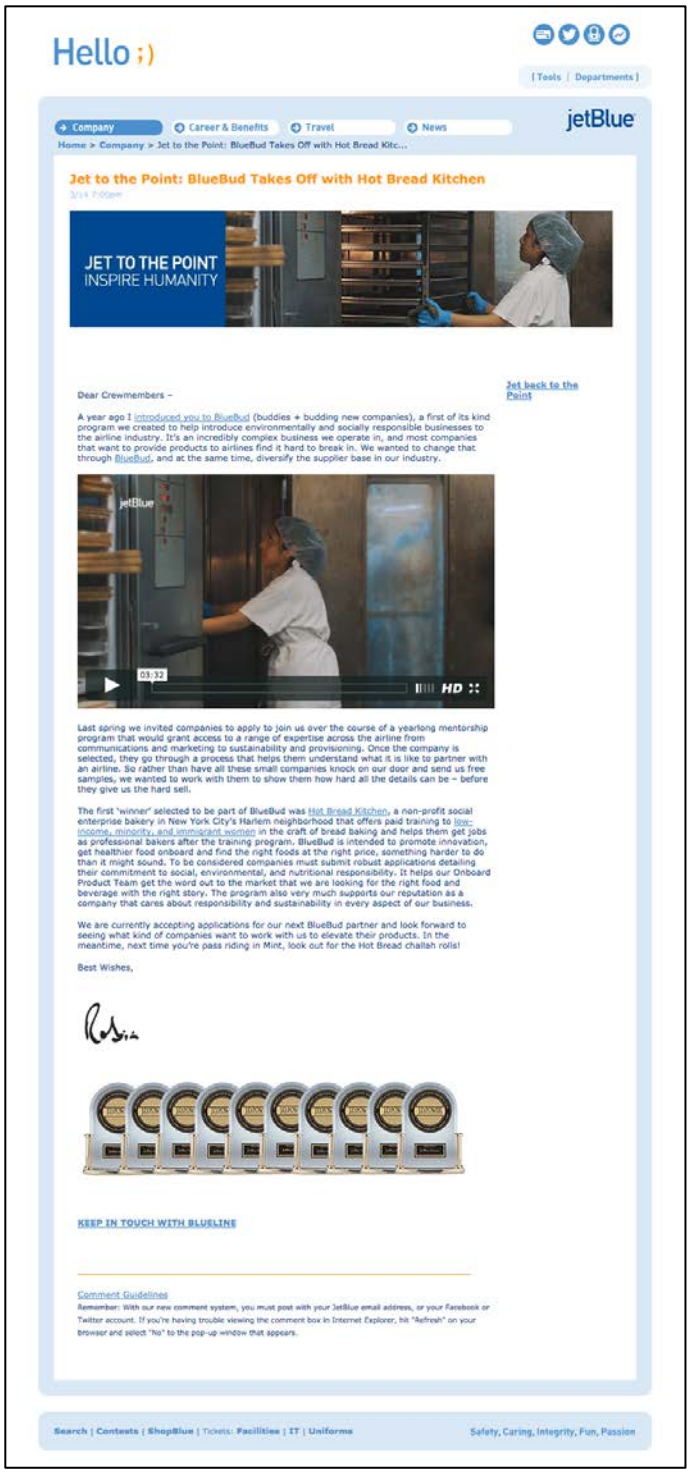


Image 86. JetBlue Intranet Original Article Page. The original article page on the JetBlue intranet offers no personalization or engagement. *JetBlue_02_article_detail_page_version1.png*



DESIGN REVIEW

Homepage

Image 87. JetBlue Intranet Homepage. The new homepage displays news and business metrics to keep all Crewmembers apprised of the company's business goals. *JetBlue_03_homepage_daily_news_live.png*

Homepage Highlights

1. **Visual look.** The style is modern, fun, simple, and unassuming, and matches the JetBlue brand. The color palette, typefaces, and imagery used is similar to those used on the public-facing website.
2. **Tone of voice.** The JetBlue culture is to be light and fun. Puns are part of their common language, so homepage and pages throughout HellloJetBlue contain many small jokes and puns. These are well received and even expected by the Crewmembers.
3. **Featured hero image.** A global massage or promotion appears in the hero; it is not personalized to individual Crewmembers like some of the content below it. As we know from our eye tracking research, elements that look like advertisements are often ignored, suffering from banner blindness, but promotions that match the site's color and typeface are usually looked at in the same way as other page elements, and do not suffer the banner blindness issues. The hero on HelloJetBlue's homepage has traits of the most visually attractive promotions, including:
    - Light (white) text on a dark (blue) background
    - Text in a simple typeface
    - An image near the text (but not as a background behind the text)
    - An item the user can click on, such as an open text field, link, or (as in this example) a button with a label that's a call to action (in this case, *Check it Out)*
4. ***Daily News* items.** News items and high-quality accompanying images appear toward the top of the homepage. The *Daily News* section consists of global articles applicable to all Crewmembers as well as targeted news specific to the logged-in user's role and department. Helpful information appears below the news. Headlines are bold and easy to scan to, letting Crewmembers quickly get a sense of the most recent happenings at JetBlue. Headlines are followed by a short summary of the article, and the date and time it was published. The date spells out the month, making the format helpful for international, and the time specifies the time zone. This information is especially helpful given that many of the 19,000 Crewmembers are frequently flying around the world. Typically, about five news items appear per day, and the homepage will update every time a new piece of content is published. This default setting in the CMS can be overridden so important stories can appear for longer time periods.
5. **Workgroup communications.** This section contains news targeted to the logged-in user's role and location. It is usually updated at least once a day. The image shown above displays Workgroup communications for a member of the *Support Center Workgroup*, one of nine Workgroups on HelloJetBlue.
6. **Access to all news.** The *View All Daily News* link below the hero links to the intranet's main news section. The blue *Load More* button lets people see more news on the homepage. When accessing HelloJetBlue on a phone with a small screen, the interaction cost for loading more items on the same page is likely

lower than that of going to another page. These two different commands could be used on either desktop or mobile, but users can make the choice about which will be most beneficial given their situation and device.

7. **Performance metrics.** The homepage displays performance metrics, personalized to the logged-in user, so Crewmembers can see how their Workgroup is performing. This is important, as performance impacts incentives. Example sections include: *Safety*, *On-Time*, *Profit Per Departure*, *Aircraft Damage Rate*, and *Crewmember Injury Rate.* So, upon opening HelloJetBlue, the Crewmembers can think about not only the short-term, but also about how to make a longer-term positive impact on the business.

   Making performance metrics available helps Crewmembers see where the company is doing a good job, and where they need to improve. This can spark ideas about how *they* (Crewmembers) can be responsible for improving things. Without that, people can easily get bogged down in day-to-day minutia. But not at JetBlue. Given that its customers want to feel in control and have their scheduled flights leave and arrive at the planned times, it's no surprise that JetBlue places a high priority on efficiency and measurement. In fact, Crewmembers' performance bonuses are tied to how well their company and their Workgroup performs. Thus, Crewmembers want to see the performance needles move in the right direction.

8. ***Stock Price*.** The company's stock price is listed under the news items. The simple, large text on just a sliver of white space makes it easy to read. Displaying this can help motivate all Crewmembers, whether they have literally invested in the company or not. The stock price appears first; it then shows the change in price — first the absolute change, then the percentage change.

9. **Events.** The *JetBlue Events* section includes a clear title at the top of the section, daily events that are personalized to the user's Workgroup and location, and a *View All Events* button at the top of the section. Each event is listed in clear white text its own dark blue box. The airport codes for the locations the event relates to appear in the lower left of each box. Because Crewmembers know their common airport codes, these are as recognizable to them as the fully written name would be.

10. **Social.** The next homepage section, *@HelloJetBlueSocial*, includes live social media updates and icons that link to Facebook, Twitter, and Instagram. Recent posts and photos make it easy for Crewmembers to get a pulse on what people are saying. To help encourage people to participate in social, designers ensured that the content was compelling so people were interested in it. They then designed an interface with common social elements, making it easy to discover and use.

11. **Mentions.** Users can highlight specific content for their colleagues by using an @ sign before their name in a comment. This helps bring the organization together, one conversation at a time. Crewmembers can access their own mentions via an icon in the upper right of pages.

12. **Footer.** At the bottom of the homepage are links to *Submit a story*, where users can fill in a questionnaire to make suggestions for news stories; *IT Ticket*, where they can get assistance with software systems; *Facilities Ticket*, where they can get assistance with office building services; and *Logout.* This section also includes a link to the search capabilities to remind users that search is possible if they reach the end of the page and have not yet found what they want. The section also has a link to the intranet's archive, again, in case users can't find what they need. It's helpful to have options like this in the footer; if users have scrolled all the way to the bottom of a page, they might be looking hard for something and might need assistance or a larger body of content to find it.

Mobile Homepage



Image 88. JetBlue Intranet Responsive Design. The JetBlue intranet is responsive, and designers made specific tradeoffs to accommodate slow networks, small-screen real estate, and schedule constraints. *JetBlue_04_mobile_homepage_live.png*

Mobile Homepage Highlights

Mobile access is crucial for JetBlue Crewmembers, as many use their personal mobile devices. Also, pilots and other inflight staff are issued iOS devices (typically iPads), and employees in ground operations also use shared PCs or Citrix terminals and do not have dedicated workspaces. On these shared workstations, computing resources are very limited. To help Crewmembers be productive no matter where they are in (or above) the world, Imarc made HelloJetBlue a responsive site with all content available on mobile.

Understanding the environments where Crewmembers typically work meant that Imarc had to accommodate slow networks and poor performance. It thus made design tradeoffs to accommodate this and other constraints, including limited screen real estate and limited time in Crewmembers' schedules. For example, the desktop interface offers robust content filtering with fly-out sidebar panels that let users filter by Workgroup, location, and other criteria. On smaller screens, executing filtering with the same detail level would have required the team to completely rethink how mobile filters would work. Instead, it opted to push this feature off until a later release. When making this tradeoff, the designers considered how often people would use the feature and how helpful it would be on mobile. Given that advanced filtering was less important than other features and would take longer to implement and test, designers decided to eliminate it from the current release, but they plan to add on mobile in future releases. One of the lessons learned here? Simple desktop patterns become much more complex in a mobile experience.

1. **Filtering content. Limited animations.** Animations and other more decorative elements are hidden on Citrix workstations, where computing resources are shared and limited. While these animations (clouds and a flying plane, for example) are whimsical touches that support the corporate culture, being able to *use* the intranet on shared workstations trumps these benefits.
2. **Responsive page layout for small screens.** In answer to the limited screen real estate constraint, news stories on the homepage switch from the mosaic layout seen on the desktop view to a touch-optimized carousel that lets users swipe left and right to move through articles.

Mentions

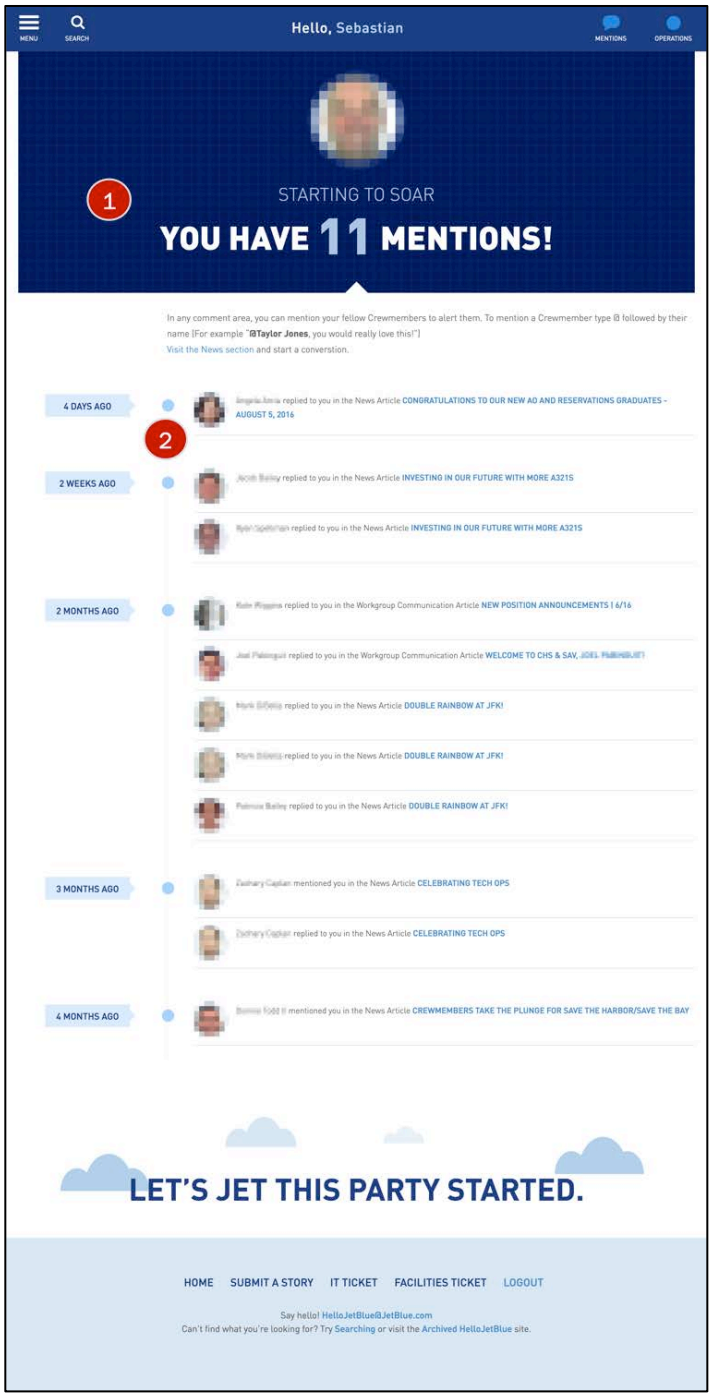


Image 89. JetBlue Intranet Mentions Page. Users can view their mentions page to see who mentioned them and where.
JetBlue_05_mentions_page_live.png

Mentions Highlights

1. **Summary.** The total number of mentions appears at the top. This helps users be more aware of which colleagues are thinking of them.
2. **Mentions.** Each mention is listed, along with the colleague who made it and when. This helps Crewmembers stay current.

Search Results



Image 90. JetBlue Intranet Search Results. Search results are immediate and show the most relevant results organized by people and content. *JetBlue_06_homepage_search_live.png*

Search Results Highlights

1. **Query repeated.** The search term is repeated at the top of the SERP, which helps users easily search again if they do not find what they want.
2. **Sections.** Results are organized by type: , such as *Crewmembers* and *Content.* The two columns make these types very easy to see.
3. **Buttons to all results.** The most relevant results appear immediately, but users can click the *View All Crewmembers* or *View All Content* buttons to see additional results. This option offers flexibility without getting in the way of the visible results.

Mobile Search

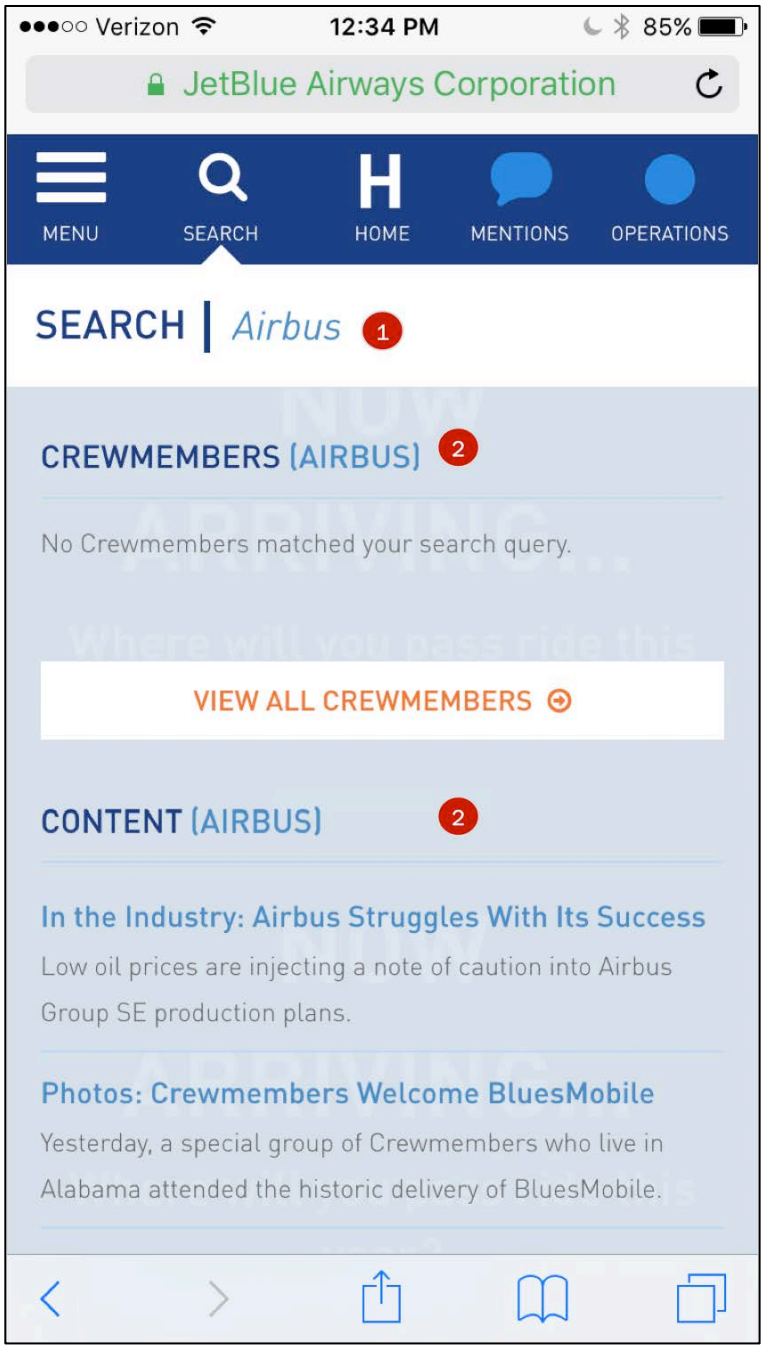


Image 91. JetBlue Intranet Mobile Search Results. Mobile search results, like desktop search results, are organized by type — *such as Crewmembers* and *Content* — but the page flows in a way that works for mobile. *JetBlue_07_mobile_search_live.png*

Mobile Search Highlights

1. **Query repeated.** As in the desktop UI, the search term is repeated at the top of the SERP, which helps users easily search again if they do not find what they want.
2. **Sections.** As in desktop search, results are organized by type: such as *Crewmembers* and *Content.* The column drops below in the mobile interface.

News List Page

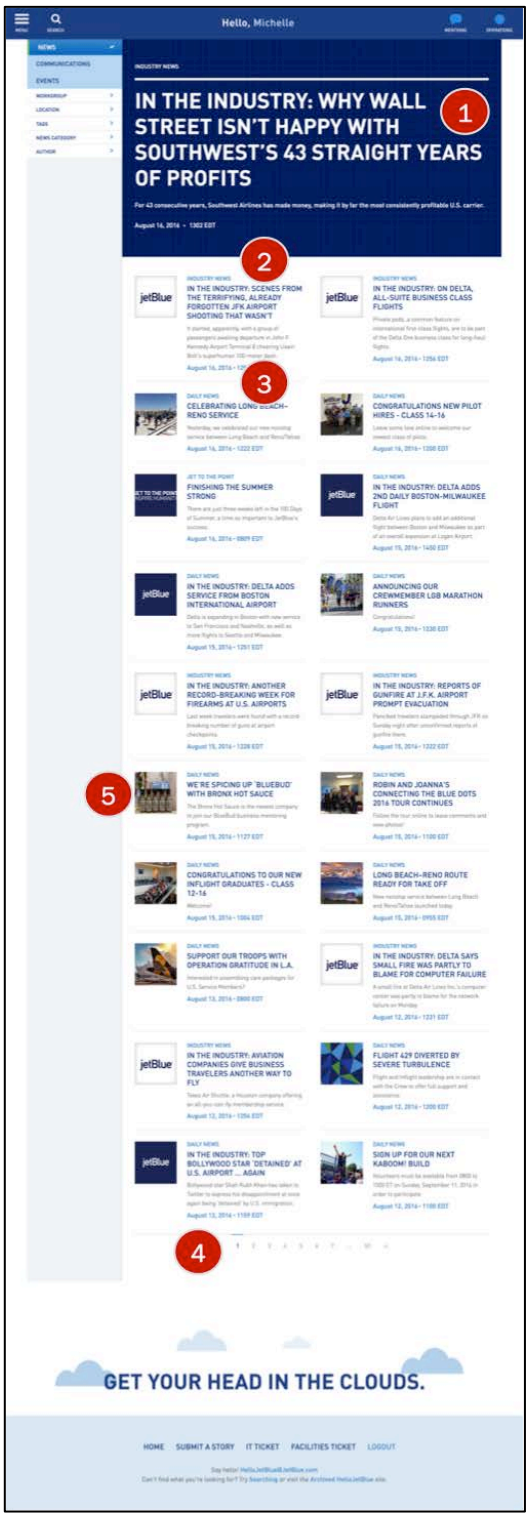


Image 92. JetBlue Intranet News List Page. The news list page includes a showcased news item. For each of the remaining news entries it displays clear titles, labels for the news type, images, short summaries, and an internationally formatted date and time stamp. *JetBlue_08_news_list_page_live.png*

News List Page Highlights

1. **Top story.** An important news story is showcased in the banner at the top of the news list page.
2. **News categories.** News is categorized (example: *Industry News*), which lets Crewmembers easily scan articles and click to view more of the subject matter of interest.
3. **Daily (internal) news.** Corporate Communications writes daily news about everything under the sun at the company.
4. **Pagination.** The number links at the bottom of the page make it easy to scroll or swipe through the news items. Thus, when focused on news, Crewmembers can spend some time educating themselves about many topics related to their jobs. People who know their job, plus what's happening at the organization, with competitors, and in the industry as a whole are incredibly valuable at any company. This pagination feature helps make this type of employee quite common at JetBlue.
5. **Related images.** Related pictures accompany many news stories. Whenever possible, these images are photos of JetBlue employees and events, rather than stock art. Illustrations are meant to stay true to the JetBlue brand. Such photos and illustrations add more information and entice site visitors to further engage with the article.

News Article

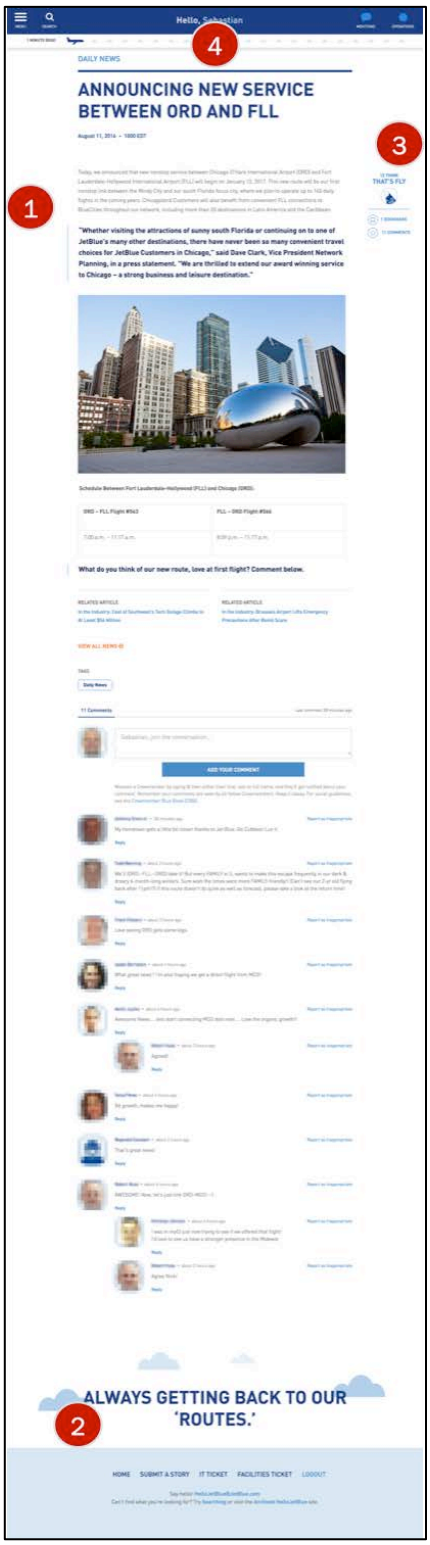


Image 93. JetBlue Intranet Articles. Articles share interesting information; employees can like them by choosing *That's Fly*. *JetBlue_09_article_detail_live.png*

News Article Highlights

1. **Strong tone of voice.** Humor is a healthy element in JetBlue's culture and is the tone of voice used in the company's marketing materials, on its planes, and on the public-facing website. The same tone is used on HelloJetBlue, which is professional, but also light and humorous. In particular, puns — such as "Let's jet this party started" and "Jet to the point" — are peppered throughout the site. And, if Crewmembers want to show they enjoyed an article, they click *That's Fly*, rather than the more traditional "like."
2. **Puns at the bottom of pages.** The fun feature nicknamed the "fortune cookie" displays random puns created by the marketing team — such as "Get your head in the clouds" and "Always getting back to our 'routes'" — at the bottom of most pages. These help keep pages fun and engaging. As amusing as these may be, JetBlue can be serious when it should be. In the event of an operational advisory, an alert, or when articles focus on more somber topics, admins can hide the fun features, either globally or per article.
3. **Social.** The number of comments, *That's Fly*s, and people who have bookmarked the article appears in the upper right rail. This helps Crewmembers judge an article's popularity and may entice them to engage more deeply. The design team opted to use the *That's Fly* instead of "like" because they felt that likes tend to come with social baggage, such as the need to view *my* likes or see who liked a particular page. The goal here was to keep this feature more ephemeral, eliminating the expectations that might come with traditional likes. Clicking *That's Fly* triggers a cute animation and updates the count, but does nothing more.
4. ***Minutes to Read.*** The *Minutes to Read* status is a fun feature that gives users a sense about roughly how long it will take to read a particular article. By default, minutes are calculated based on the content: 300 words counts for one minute of reading. However, the CMS lets content administrators override this. The status that the user sees includes a small airplane graphic that subtly travels horizontally at the top of the page as the reader scrolls down.

About



Image 94. JetBlue Intranet *About* Section. The *About* section includes information about the organization, teams, partners, equipment, products, cities where they travel, and executives. *JetBlue_10_about_page_live.png*

About Highlights

The *About* page serves as a high-level overview of the JetBlue brand. It can be used as a brand guideline for new Crewmembers, as well as for an overview of all things important to JetBlue — including its values, partners, tailfin graphics, planes, products, and locations.

1. ***Inspiring Humanity*.** The *About* page encompasses information about the company and its values, tipping its hand with the page's title — *Inspiring Humanity* — which is JetBlue's mission.
2. ***Crewmembers*.** This section helps Crewmembers learn about or be reminded of what different teams at the organization do. This aids in collaboration, growth, and continued improvement in customer support.
3. ***Exec Crew*.** Here, Crewmembers can read about the company's highest-level managers.

Operational Status

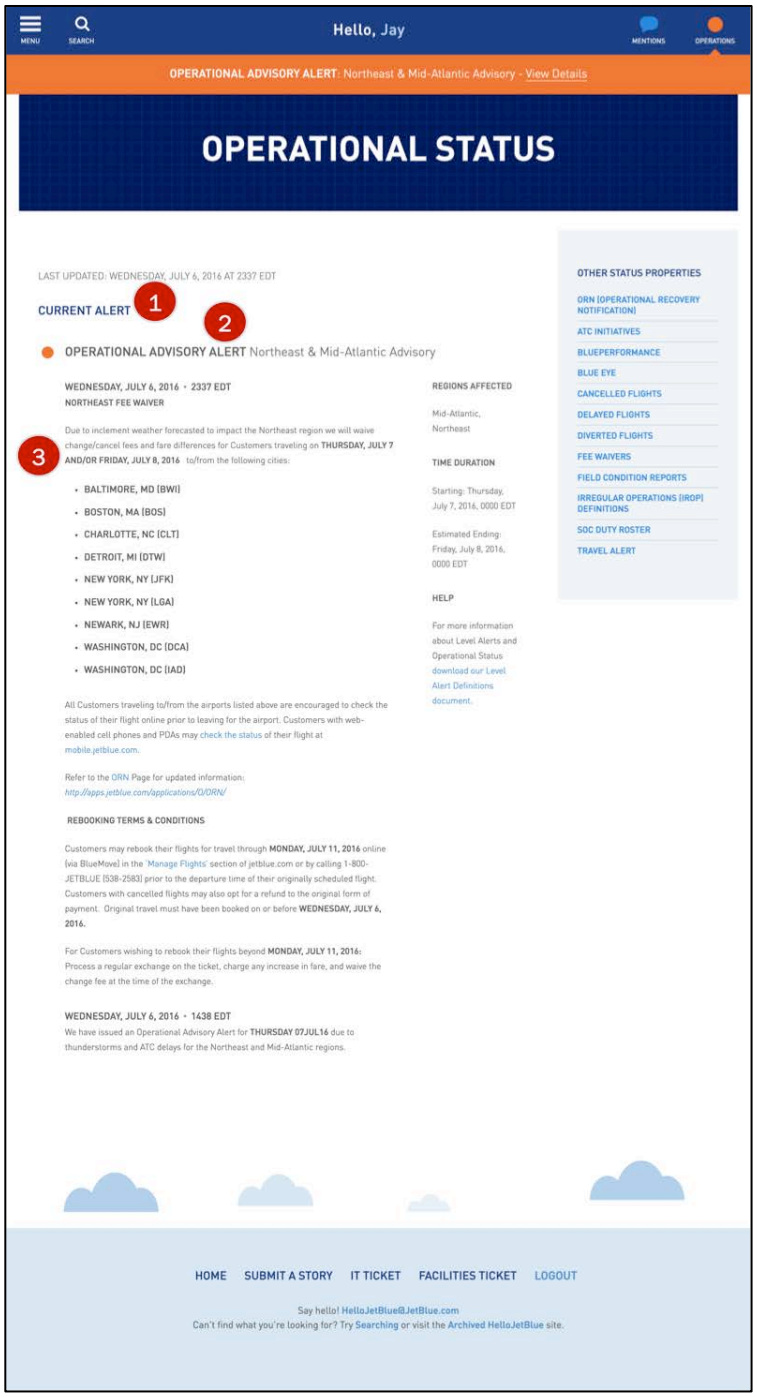


Image 95. JetBlue Intranet Operational Status. A globally visible messaging feature on the JetBlue intranet alerts employees to JetBlue's flight status. *JetBlue_11_operational_status_live.png*

Operational Status Highlights

1. ***Current Alert*.** This appropriately labeled section contains the most up-to-date information.
2. **Alert type.** Below the *Current Alert*, the alert type and subject are clearly marked, letting Crewmembers quickly see the important information.
3. **Information and steps.** The body of the alert aims to help Crewmembers understand the scenario and proceed in a consistent and helpful way. A narrow text column and obvious subheads make the page easy to digest.

Resources

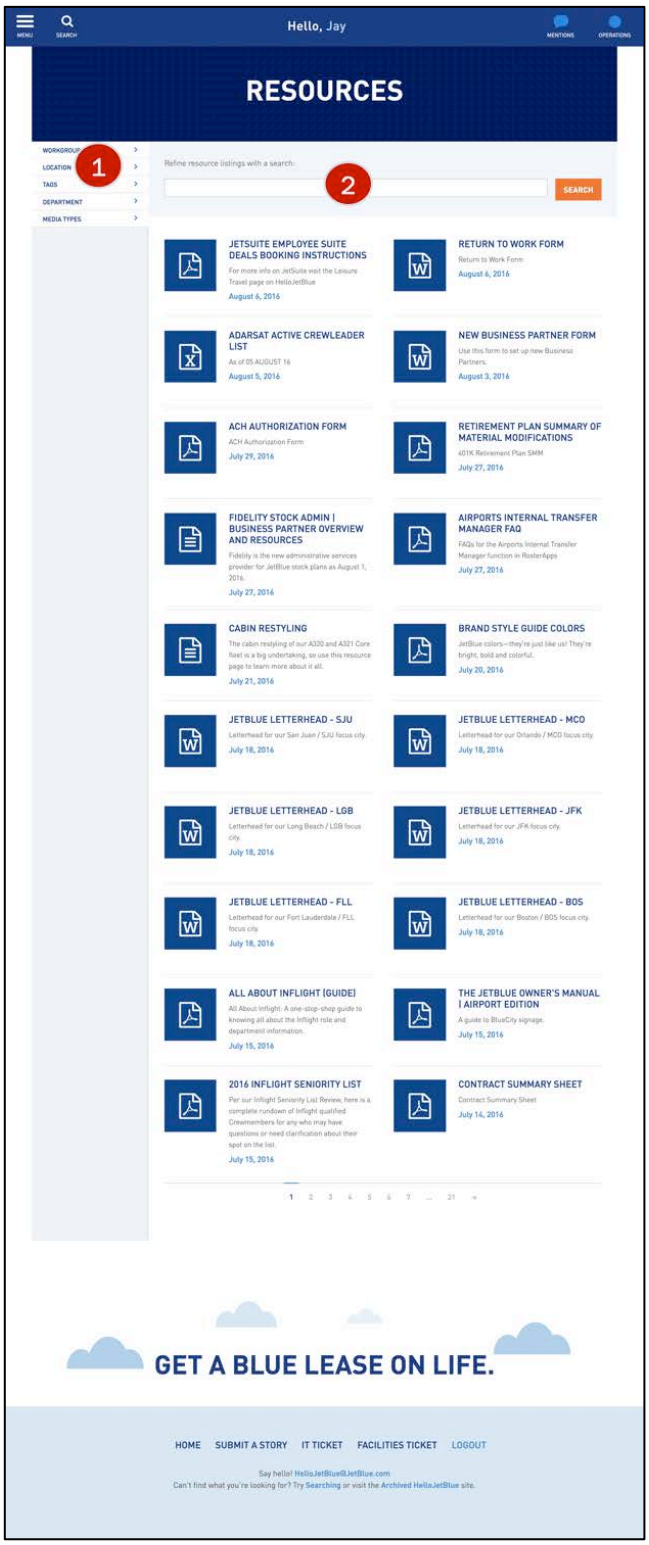


Image 96. JetBlue Intranet *Resources* Page. The *Resources* page consolidates many tools and other resources all in one place. *JetBlue_12_resource_list_page_live.png*

Resources Highlights

1. **Menu.** The left-side navigation menu helps advertise which resources are available. It also makes it easy for users to browse the numerous offerings by traits such as *Workgroup*, *location*, and *tags*.
2. **Search.** When users are unsure about which resource they need, they can try searching for related terms for help. If they know exactly which resource they need and what it is commonly called, they can search for that as well.

DESIGN PROCESS AND USABILITY WORK

Direct User Feedback

Throughout the discovery phase, the team sought to balance the stakeholders' vision with actual user needs, so it focused its efforts on a few main research methods aimed at including users directly whenever possible:

- **JetBlue University.** The Imarc team began the discovery phase by attending JetBlue University, a two-day new Crewmember onboarding process and brand-initiation event in Orlando.
- **Survey of 2,300 Crewmembers.** Imarc asked a series of questions across JetBlue's major Workgroups with the goal of understanding their top intranet uses, content priorities, device usage, current pain points, and constructive ideas.
- **Paper prototyping.** The team traveled to a quarterly value summit, which is a gathering of representatives from each of the Workgroups. Here, Imarc printed tabloid-sized wireframes of high-level use cases, taped them to a wall, and surveyed small groups of Crewmembers about what they would click on to accomplish certain tasks. These simple, low-effort exercises led to much discussion and yielded great feedback. Imarc incorporated the findings into the next iteration of wireframes.

The team used the feedback and other findings from these efforts to craft the sitemap and additional wireframes.

During the design process, the team also reviewed previous editions of NN/g Intranet Design Annual reports so it could learn from other companies' best practices and study their successful intranets.

Redesigning the IA

The main challenge for the site redesign was the way in which the existing 10-year-old JetBlue intranet had grown. The existing IA tried its best to mimic the company's organizational structure, but had organically lost focus over time. As a result, information had become siloed and hard to access, requiring users to have previous knowledge of where to find particular documents or pages.

The other IA challenge was that JetBlue users were very familiar with the site's structure, and its task flow had become ingrained in their daily activities — despite the fact that it had long been difficult to use. A key decision Imarc made early on in the design process was to advocate for a complete re-architecture of the site, even though such a transformation would require a relearning period for JetBlue's Crewmembers.

The new IA approach is focused on organizing the content based on a task and Workgroup perspective, making the site easier to use for daily activities, as well as more intuitive for users who like to browse. The team also created robust search functionality to help transition users to the new architecture. Imarc drafted new IA concepts and validated them with the core team through a series of meetings and work sessions. Then, the team tested its assumptions directly with JetBlue

Crewmembers utilizing Treejack by OptimalSort. This hands-on, iterative process enabled the design team to create a more intuitive and useful IA through user feedback.

Adoption and Buy-In

Adoption was easy in some respects because HelloJetBlue is set as the default site on every Crewmember's JetBlue-issued device. HelloJetBlue is also the primary jumping-off point to access company webmail, HR, and other key services.

Buy-in, however was a strategic initiative that started at the very beginning of the project. This was important because the team recognized that even the slightest change in a piece of software that is used daily can disrupt someone's workflow and cause a negative experience. With this in mind, the team began its design activities aiming for user outreach throughout the process.

Buy-in was also fueled by many of the site's new components. By providing social components — such as comments, user notifications, favorites, and likes — site users were much more apt to spend time reading and interacting with content rather than simply using the site as a hub to jump to other systems as they had in the past.

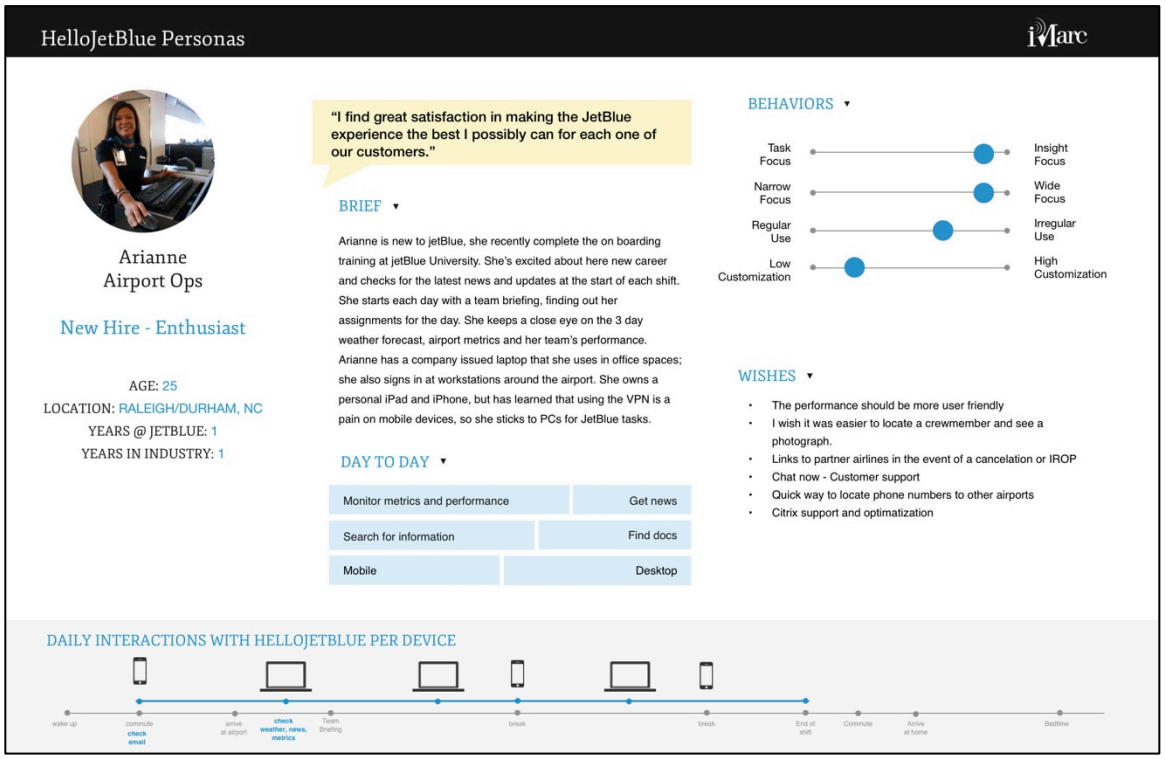


Image 97. JetBlue Intranet Personas. The design team interviewed SMEs and used the information to craft personas. The personas were effective in highlighting day-to-day activities, behaviors, wishes, and goals, as well as how the new intranet could meet these goals. *JetBlue_13_personas_2.jpg*

GOVERNANCE

Corporate Communications owns the intranet and keeps the site updated with important news content. It is never stagnant. The ownership team continues to prioritize improvements with biweekly releases of updates; having this teams also allows for centralized storage of all resources, links, and internal communications.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Corporate Core Team	• Provide vision, set overall goals, coordinate among other stakeholders and managers, and set quality standards for interactivity and design • Author content, including video, graphical, and resource-based assets • Communicate corporate vision and direction to Crewmembers • Curate and summarize the most important industry-related stories (including mergers, new regulations, and so on)
Workgroup Leaders	• Provide access to Workgroup and department Crewmembers so they can contribute feedback, testing, and insight • Communicate updates; teams are moving away from Workgroup-wide emails in favor of posts on HelloJetBlue • Organize and promote events

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://hellojetblue.com
Default Status	The intranet is the default homepage on all JetBlue-issued devices.
Remote Access	Pilots, in-flight staff, and most Workgroups regularly check the site remotely.
Shared Workstations or Kiosks	Various departments — such as pilots, inflight, and ground operations — use shared PCs and/or Citrix terminals, as they do not have dedicated workspaces. Shared workstations increase the value of being able to access the intranet from personal mobile devices. Users are not tied to their workstation and can still access the intranet when others are using the workstation.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
October 2012	• JetBlue's initial intranet redesign RFP
October 2013	• Updated JetBlue RFP
October 2012–March 2014	• Sales and business development process
May 2014	• Strategy project: Kickoff
May–August 2014	• Strategy project: Initial discovery and strategy
June–September 2014	• Strategy project: Initial creative design
October 2014	• JetBlue's RFP for development and implementation
February 2015	• Development kickoff
March–July 2015	• UX: Sitemap and wireframes
July–October 2015	• Creative design
June–December 2015	• Development and implementation
October 2015–January 2016	• Content migration
January–February 2016	• QA: Three testing cycles
March 2016	• Beta period: New site open to 200–300 select users
April 6, 2016	• Company-wide rollout
Total project timeline: 19–20 months	

CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Contributors	During the initial project phase approximately 4–10 Corporate Communications Crewmembers, one Imarc team member, and one other JetBlue Crewmember examined existing content to determine what would be brought over and what would be curated.
Contribution	Corporate Communications dictates the frequency and number of news stories. Because the site is so well used and well liked, it encourages contribution. Many Crewmembers want to contribute, and Corporate Communication helps filter that content. The team provides a mechanism for people to contribute (*Submit a Story*) and then chooses which stories to feature.
Training	**Training tools include:** • Multiple onsite working meetings and remote screenshares • The CMS includes large amounts of contextual help text and documentation • Some training session screenshares were recorded and are available on the intranet
Management	• The intranet has a versioning system that allows content creators to review drafts internally • Social content is monitored internally. Any user can flag a comment as inappropriate.
Quality	Corporate Communications manages content quality
Culling Content	The project team met with the heads of each department to see which content they wanted to bring over. Once the new site was seen during the beta period, a lot more content was brought over as the department heads had aggressively culled during the first round.

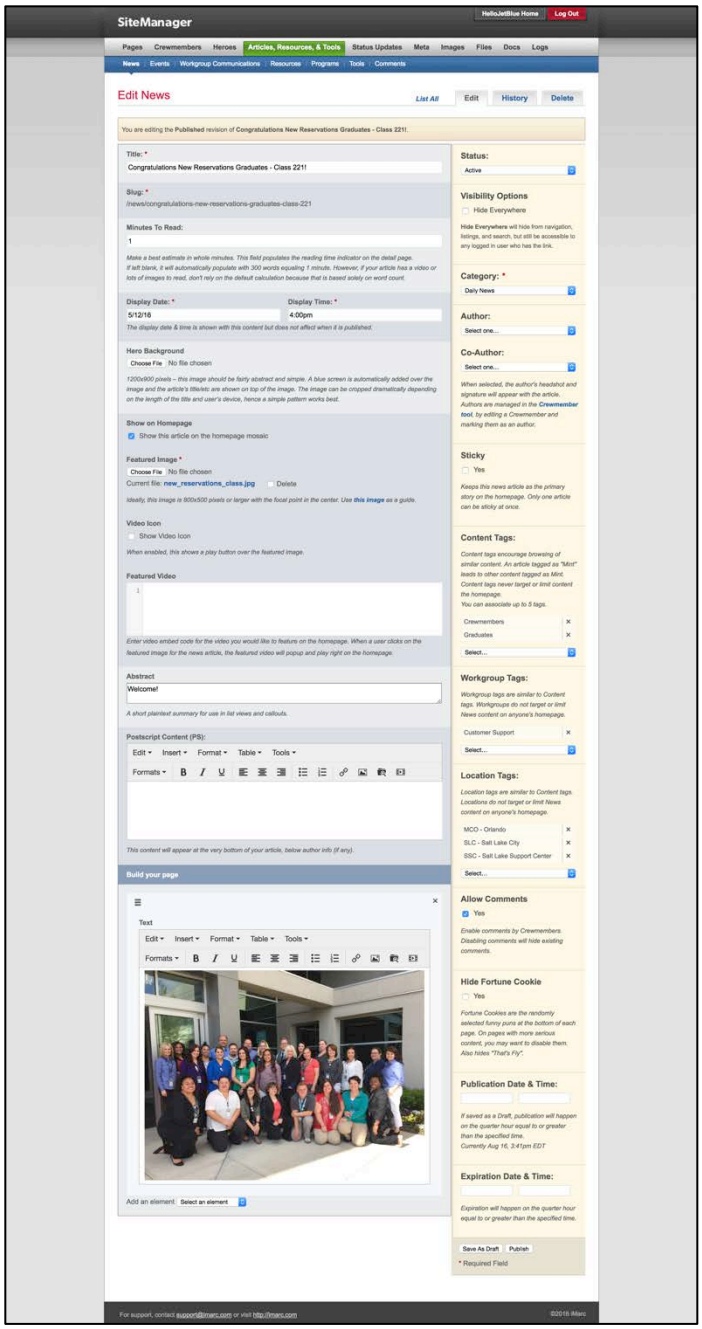


Image 98. JetBlue Intranet Custom CMS. Content managers can build an article in this custom CMS interface. It was designed to include an abundance of coaching text, so even inexperienced team members can build out an article. Each feature is segmented and offers a preview of what the article will look like when it's live on the site. *JetBlueAirways_14_CMS_article_detail_live.png*

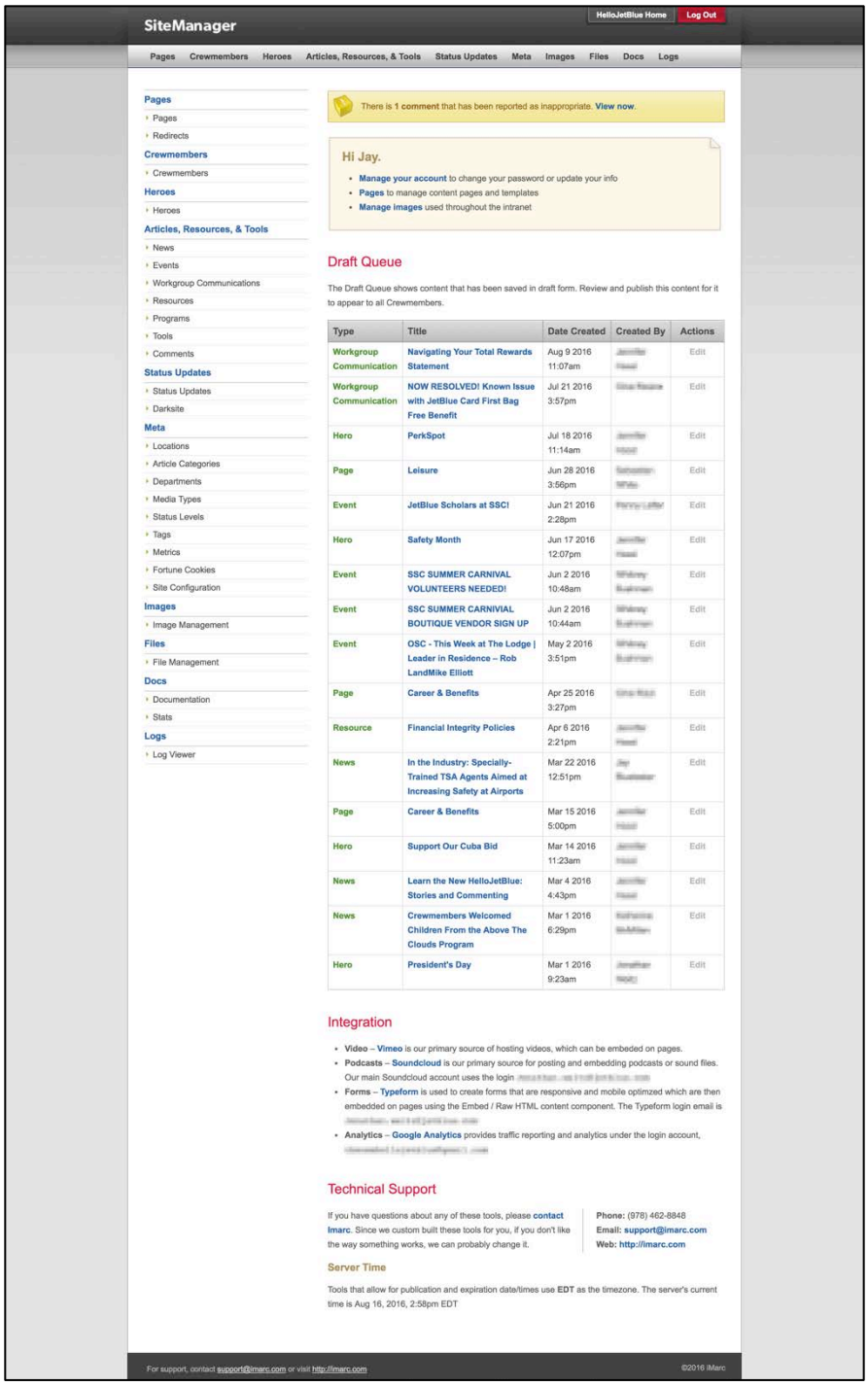


Image 99. JetBlue Intranet Administrator Interface. Administrators see this page when they first sign in to SiteManager on the JetBlue intranet. Highlighted here are the most frequently used tools, drafts awaiting review, and quick links to third-party platforms (Google Analytics, Vimeo, Sound Cloud). *JetBlue_15_CMS_dashboard_live.png*

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• CentOS Linux on dedicated hardware, Apache, PHP, Memcached, and PostgreSQL
Bug Tracking/Quality Assurance	• ActiveCollab
Design Tools	• Adobe Photoshop, Adobe Illustrator, Adobe After Effects, and OmniGraffle
Site Building Tools	• GitHub, Composer, and npm
Content Management Tools	• Custom CMS (SiteManager)
Search	• Postgres full-text search
Other Functions	• Users are authenticated through JetBlue's SAML 2.0 single sign-on service; the website also receives nightly exports from SAP, which contains additional user information (such as Workgroup, location, contact info, and badge photo)

ROI

As a company, JetBlue places a high priority on efficiency and measurement through metrics. The project's stakeholders — Corporate Communications — regularly talk with departments in an effort to obtain qualitative feedback on the new intranet. The intranet team is also planning to do a follow-up survey and conduct focus groups.

The intranet team tracks several useful metrics to gauge how Crewmembers are using the site on a daily basis. Following are some of the notable Google Analytics metrics measured over a three-month period (May 1–August 1, 2016):

- **Page views:** 3,118,466
- **Site traffic** (sessions): 2,140,294
- **Average session duration:** 3 minutes
- **Location:** accessed from 108 countries

Stats from the SiteManager (CMS) also give the team insight into how people use features and engage with content. These figures represent tracking during the period since launch (April–August 2016):

- **Number of tools saved:** 83,961
- **Number of people saving tools:** 13,499
- **Number of likes:** 4,397
- **Number of people who liked:** 1,163

- **Number of mentions:** 1,690
- **Number of mention replies:** 791
- **Number of comments:** 3,862
- **Number of commenters:** 1,846
- **Number of bookmarks:** 1,658
- **Number of Crewmembers bookmarking:** 1,049
- **Number of unique bookmarks:** 416

LESSONS LEARNED

Lessons Learned

Members of the Imarc team talk about the lessons the team learned while working on this redesign:

- **Mobile interactions are complex and must be designed for.** "Desktop features can be surprisingly complex on mobile because it is an intranet. We had to forgo some filtering features on mobile simply because there was not enough time to get the interaction design right. Simple desktop patterns become increasingly more difficult given task complexity and lack of real estate on device screens." (Thomas Saraceno, Director of Experience, Imarc)
- **Have a good mix of team members.** "Team make-up is extremely important in such a collaborative effort. Imarc's team worked extremely well, both internally and with the JetBlue core team. There was a good sense of camaraderie and passion to create something successful — as well as unique — in the space of intranets. The success of the project is a result of this collaboration." (Marcel Moreau, Lead Experience Engineer, Imarc)

Best Practices

Imarc team members also have a few best practices that other teams can apply to their own projects:

- **Interact with the user — often.** "We were able to validate our ideas and learn a great deal along the way by closely interacting with users and validating our understanding about how they use the site for daily tasks and company communications."
- **Set expectations for the intranet.** "The social aspect could be compared to Facebook, which it will never be able to stack up against. We decided to differentiate our social aspect by not using terms such as 'like' so it is not held up to Facebook standards."
- **Connect people.** "The social functionality we implemented is hugely successful and bridges the gap between 19,000 Crewmembers working in 80-plus locations."

Kerry Group plc

OVERVIEW

COMPANY

Kerry Group provides the largest, most innovative portfolio of Taste & Nutrition technologies and systems, and functional ingredients & actives for the global food, beverage, and pharmaceutical industries. The consumer foods division, Kerry Foods, is also a leading consumer foods processor and supplier in select EU markets.

Headquarters: Tralee, County Kerry, Ireland

Company locations: Worldwide

Locations where people use the intranet: Employees at all Kerry Group sites, offices, factories, and locations use mykerry,

Annual revenue: 2015 Group revenue was €6.1 billion (euros)

THE INTRANET

Users: Approximately 13,000 users at 163 sites in nearly 50 different countries across five continents

Mobile approach: Responsive web design

Technology platform: SharePoint 2013

TEAM

Executive sponsorship: Gerry Behan, President & CEO Kerry; Flor Healy, CEO Kerry Foods; Michael O'Neill, President & CEO North America; Brian Mehigan, CFO; Frank Hayes, Director of Corporate Affairs, Kerry Group; Iain Witherington, Senior Vice-President Group HR

Executive leadership: Noelle Watts, VP of ICT & Digital Lead; Jim Egan, Director, Employee Communications & Engagement Kerry; Tony Bergin, Group Internal Communications Manager; Sue Lamon Diver, Marketing Communications Director–EMEA; Sharon Whitehead, VP of Global HR; Noranne Courtney, Regional Business Engagement Manager; Dillan Shikotra, Internal Communications, Kerry Foods

Functional Leadership: Andy Royston, Chief Marketing Officer Kerry; Khaled Zitoun, Global CTO; Tom Murphy, Chief Procurement Officer; Pat Casey, CIO–Retired; Brenda L'Estrange, Chief Information and Process Officer

CORE TEAM

Design/Analyst Team: Gillian O'Halloran, mykerry Team Lead; Paul MacDonald, Analyst; Robert McWhinney, Analyst

External: Randall Snare, Head of Content Strategy; Owen Derby, Creative Director; Sheena Bouchier, UX Designer; Lynsey Duncan, UX Designer; Tom Cunningham, Graphic Designer; Charles Fenoughty, Digital Strategist; Emily Atkins, UX Designer

Technical Team: Adnan Ahmed, SharePoint Architect; Liam McCambridge, Senior Developer; Nicole Hesser, SharePoint Administrator

External: Sridhar Bommana, Technical Lead; Krishna Vungarala, Technical Lead; Saurabh Tripati, Technical Lead; Akash Rawat, SharePoint Developer; Adrian Heaney, UX Developer; Conor Luddy, UX Developer; Rod Farry, UX Developer; Ingars Paeglitis, Senior SharePoint Developer; Joao Lopez, Senior SharePoint Developer

Communications: Gemma Lougheed, Communications Assistant; Michele Caldwell, Communications and Community Relations Representative

Training: Noel McDermott, Global Learning Manager; Romeo Damian, Global Learning Specialist

INTRANET TEAM



Team members shown here (top row, left to right): Gillian O'Halloran, Paul MacDonald, Robert McWhinney, Adnan Ahmed, Liam McCambridge, and Nicole Hesser; (bottom row, left to right): Noelle Watts, Tony Bergin, Jim Egan, Michele Caldwell, Noel McDermott, and Gemma Lougheed.

HIGHLIGHTS ABOUT THIS WINNER

The Kerry Group intranet, mykerry, supports 13,000 of Kerry Group's employees, across five continents and 163 locations in 50 countries. The new site was designed with collaboration and knowledge sharing in mind, to help employees find information and connect with one another. The team integrated social tools for the first time, added video, and created personalized experiences for employees around the world.

- **Regional content.** The new site includes personalized content based on the employee's region. News is now targeted to specific geographic areas, helping to ensure content is useful and relevant to local audiences. When the communications team adds a news story to the site, they can send it to the global organization or tag it by specific region or functional department to target it to specific people.
- **Introducing social tools.** To help meet the goal of fostering a global culture of knowledge sharing and collaboration, the team introduced social tools, enabling two-way communication on the intranet for the first time. The team encourages participation with the new tools by using an informal tone and getting leadership involved in creating and reacting to content. The team also launched a "Let's Get Social" campaign with posters and signage, and started a leaderboard competition. The campaign aimed to increase awareness and use. It included information about how to use social elements, such as hashtags (#), how to label content, and how to use the @ symbol to refer to other employees or groups in posts.

- **Single platform.** The site provides a single entry point for information and productivity applications across the entire worldwide organization. One goal of the site is to help employees find the information and people they need to help bring the most value to customers. The intranet also acts to unite an organization that is constantly growing. As Kerry Group acquires businesses around the world, the new site helps integrate these new businesses and employees, enabling them to easily connect with their new colleagues.
- **Quick delivery.** The team had a nine-month timeline, including design, sign off, testing, and implementation. This was a very tight schedule, so it was vital that the project was scoped appropriately. Decisions had to be made to identify the functionality that would bring the most benefit, and these elements were prioritized over less critical functionality, which was scheduled for future releases. This process gave the organization a pipeline for future development and ongoing improvement, while the appropriately scoped project was delivered on time and within budget.

BACKGROUND

Kerry Group's intranet, mykerry, is a collaboration and knowledge space developed to significantly enhance information availability and UX for Kerry Group employees. It includes information on people, strategies, policies, locations, technologies, products, brands, and customers and is built to connect the company's employees across the globe and help them do their jobs more easily.

The main reason for the most recent intranet redesign was to replace an existing legacy intranet solution, which was outdated and no longer met the organization's needs. Kerry Group had grown significantly since the original solution was deployed and has become a truly global organization, with employees dispersed across the world and often on the move.

To support this growth and the information needs of its employees, the company needed an up-to-date intranet solution with a whole host of new functionality, including regionally customized news, video, social, content management, access security, mobile availability, and integration with a variety of other systems.

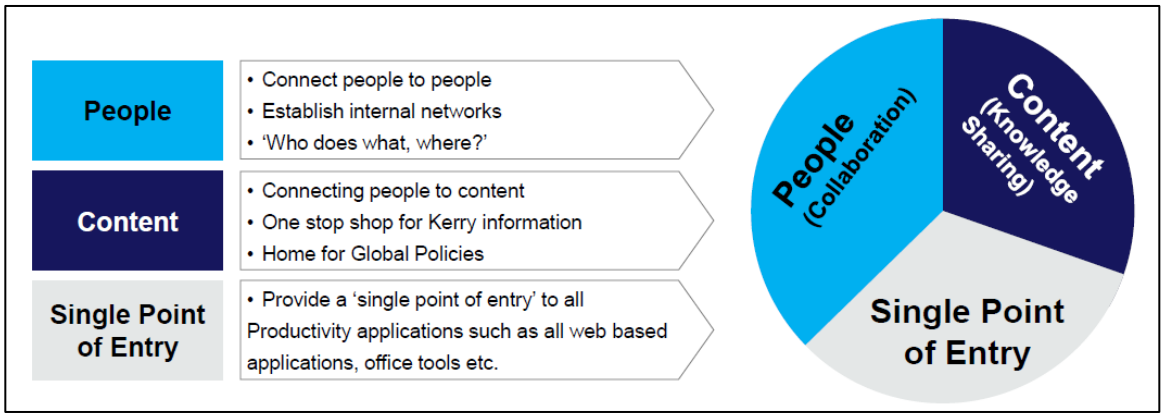
In addition, the organization needed a new, scalable technical solution that could meet its needs as the business evolved. It chose SharePoint to meet this requirement.

Goals

The project's overall goal was to foster a global culture of knowledge sharing, knowledge transfer, and collaboration. The redesign's high-level goals were to better connect

- **People to people:** Support collaboration by establishing a comprehensive employee profile database and various internal networks across subject matter and locations.

- **People to content:** Provide easy access to and rules for content and information storage, supported by integrated search.
- **Single point of entry:** Provide one access point to all productivity applications.



This chart illustrates the company's high level goals as they embarked on an intranet redesign project.

Specific goals included the following:

- Support global business growth strategies
- Drive business efficiency for all future acquisitions
- Accelerate the on-boarding process for employees taking on new roles and responsibilities
- Encourage employee growth by facilitating strong working relationships
- Promote continuous improvement and consistent ways of working across all global functions, technologies, and end-use markets
- Value, recognize, and reward employee expertise, knowledge, and engagement
- Provide a single, user-friendly, and intuitive virtual global platform that would
    - Enable and sustain knowledge management success through global governance
    - Provide a continuous stream of meaningful, interesting, and fresh content
    - Provide a single point of entry for all knowledge, applications, and contacts employees require to maximize their performance
    - Integrate with communication technologies including mobile devices, applications, videos, and social media

In addition to these broad goals, the organization wanted the new intranet to accomplish some tactical wins by adding new functionality to support news, video, and social components. It also wanted to spruce up the homepage's look and feel to better reflect the branding and modernity of the organization.

Challenges

- **Timeline.** The timeline was the most significant project challenge. The team had only nine months to get the new intranet designed, approved, signed-off, tested, and implemented. Some elements of the original design had to be pushed into a future release because they required more time for technical work (the presence indicators on social, for example) or because the content was not ready.
- **User feedback.** Getting comprehensive user feedback from a global organization was also a challenge in the short timeframe. To accomplish this, the team formed super user and focus groups so it could gather as much input as possible. After go-live, the team continued to conduct focus groups, with the resulting feedback leading to some rework. Keeping the focus groups going has proven very valuable; the team has gained excellent insights from people using the new intranet in their day-to-day jobs.

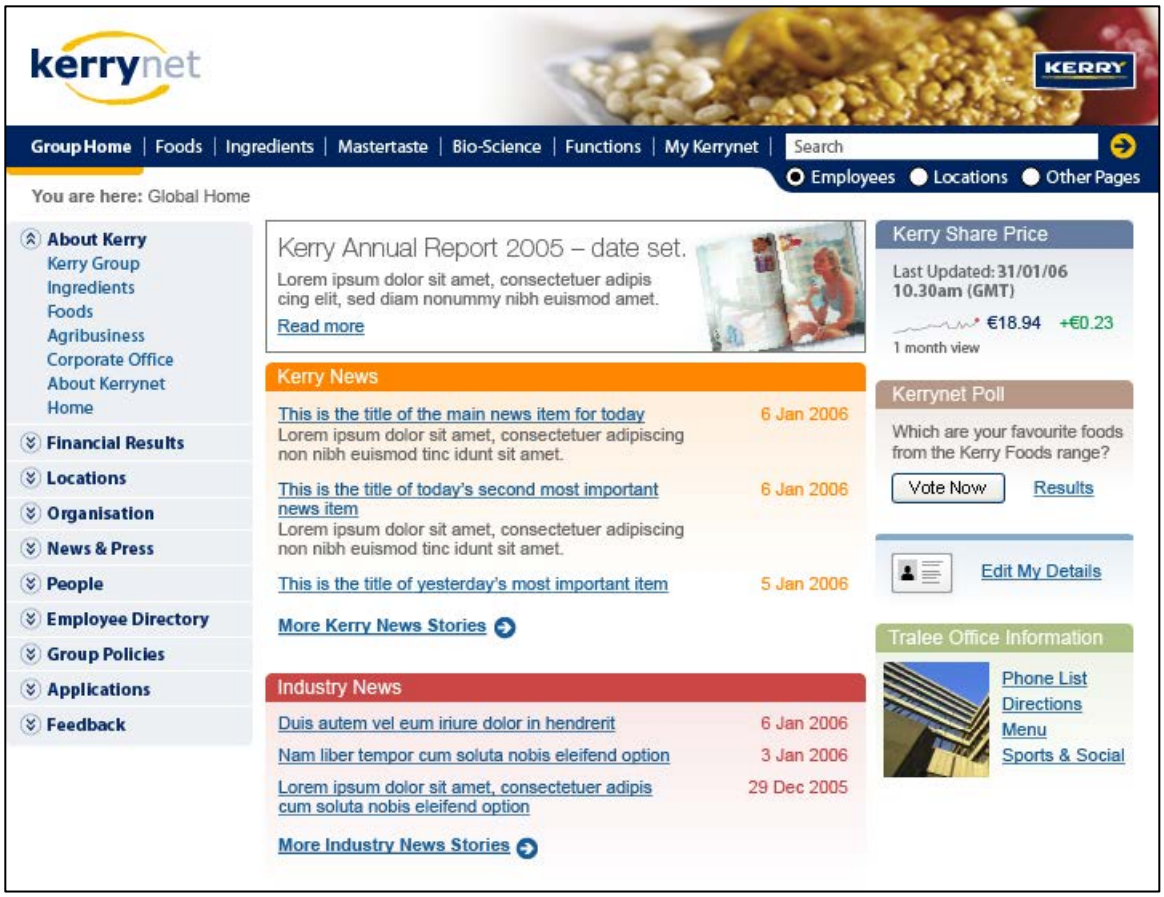


Image 100. Kerry Group Intranet Old Homepage. The old homepage, as it looked prior to the redesign. *Kerry Group_01_home_version1.png*

DESIGN REVIEW

Homepage

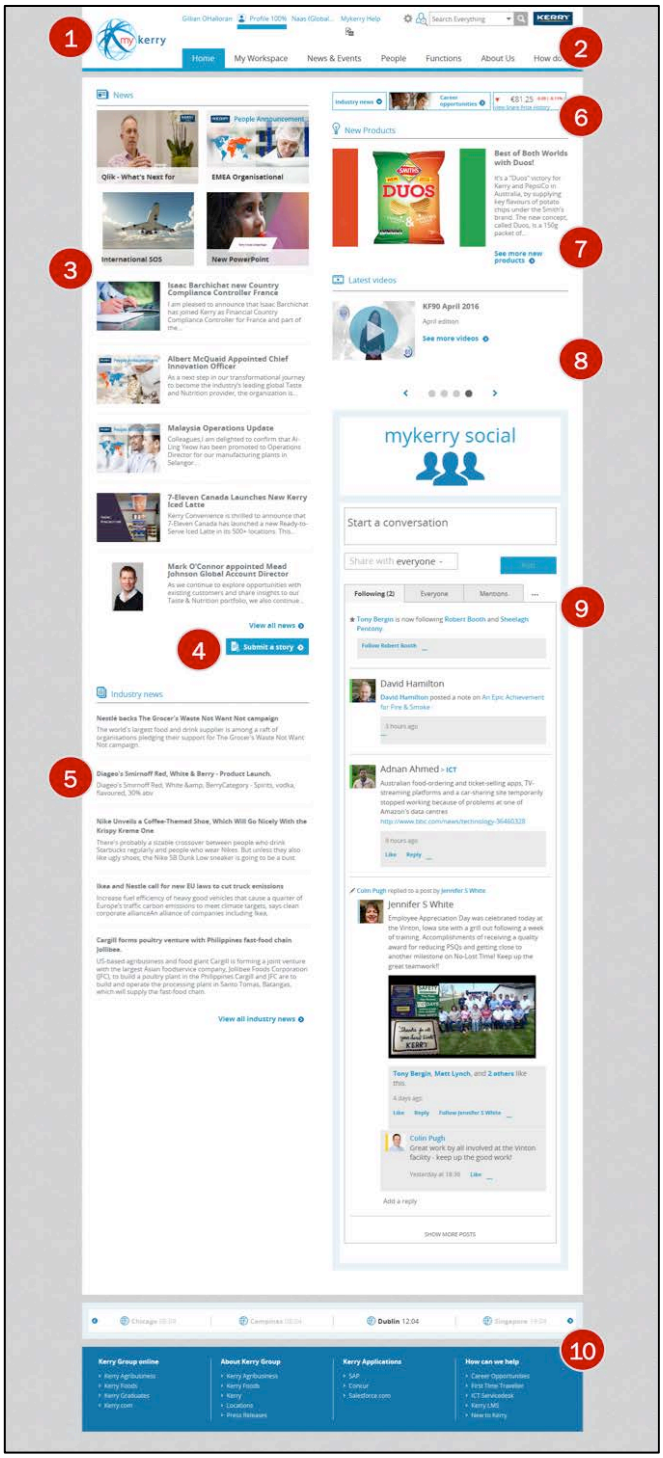


Image 101. Kerry Group Intranet New Homepage. *Kerry Group_02_home_live.png*

Homepage Highlights

1. **Modern design.** The new design reflects the organization's branding, using the corporate color of blue balanced with sufficient white space.
2. **Navigation.** The currently selected navigational section is indicated in a blue tab; the other section tabs appear as gray text on a white background.
3. **News.** The homepage prominently features news: the top four items are images with brief headlines. If users move the mouse over a news item, more information is revealed. Additional news items are listed below, with an image accompanied by a headline and the first few lines of text from the story. News is personalized based on the employee's division, location and department.
4. **Submit news.** Employees can submit ideas for news stories. A large, clear call to action — the blue button with a page icon and a link to *Submit a story* — appears directly beneath the list of news items. Any employee can submit a news story. The story goes through an approval process and can be published for a specific group or "upgraded" to the entire organization.
5. **Industry news.** At the bottom left side of the page, the *Industry news* section gives users access to information about taste, nutrition, and international consumer foods that is relevant to the organization's day-to-day work. The information is pulled into the site via an RSS feed.
6. **Quick links and information.** The homepage's upper right section includes a link to *Industry news*, which helps visitors navigate to the headlines further down the page; a link to *Career Opportunities*; and the company's share price, together with a link to the share price history. The *Career Opportunities* link was added to the homepage in response to user feedback and requests after the initial launch. Eighteen months after go-live, the team revamped and improved the homepage based on this and other user feedback.
7. ***New Products*.** Information about products from around the world appears in the upper right area, with a picture of the product and a brief description. Visitors can click through to see more new products as well. This informs and educates employees on products and also encourages new product concepts and ideas in other regions. In addition, it helps keep employees connected with both their end products and their customers.
8. **Video.** The homepage also features a carousel of the company's *Latest videos*. People can play a video from the page, navigate through the video carousel via the forward or back icons, or click a link to see more videos.
9. **Social.** *mykerry social* is featured prominently on the lower half of the homepage. Here, visitors are encouraged to *Start a conversation* via a large text field, select who will see the posted information, and then push a button to post the content. The prominence of the prompt in the design shows the importance of social sharing to the organization. The posting section is followed by three tabs that let people quickly see: posts from people they are following, posts from everyone at Kerry Group, and posts that mention them. Employees can like or reply to any post in mykerry social.

10. **Footer.** Each page's footer includes world clocks from key geographic locations: Chicago, Campinas (Brazil), Tralee (Ireland), Singapore, and Shanghai. It also provides links to external sites and Kerry Group corporate information, key applications, and support information (such as travel support and the ICT Servicedesk).

Employee Directory

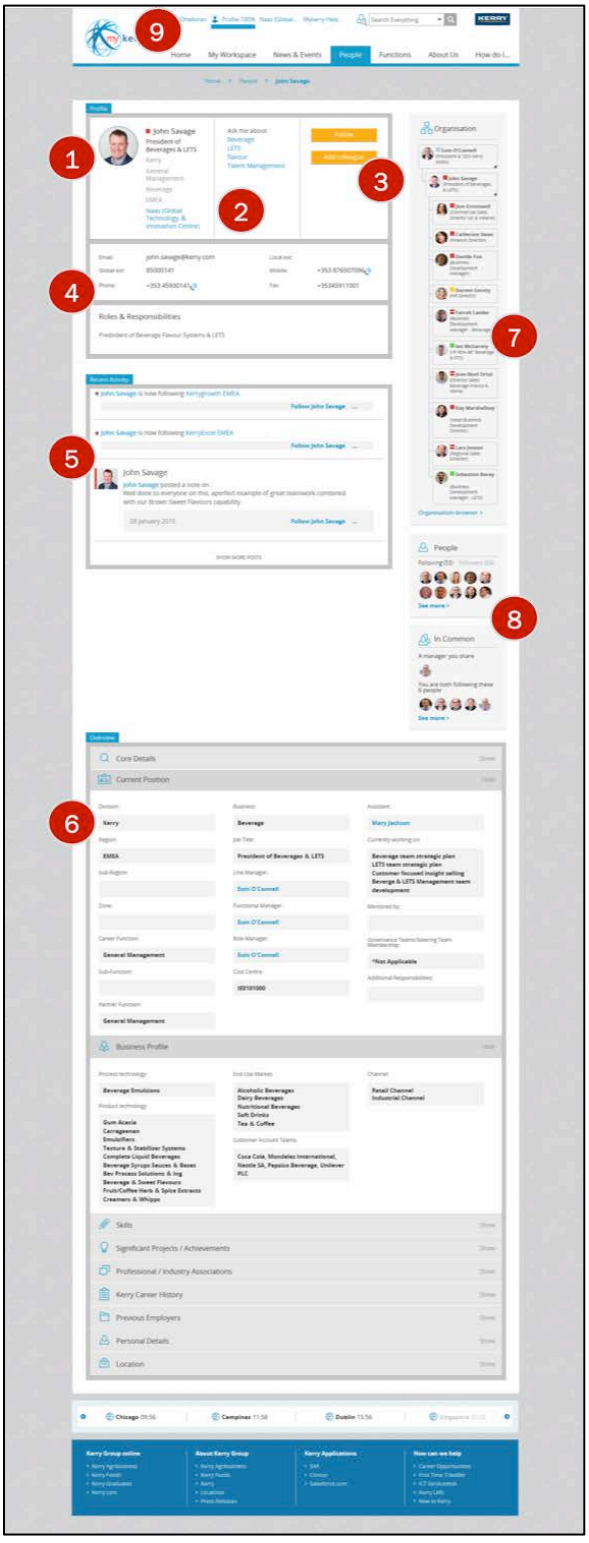


Image 102. Kerry Group Intranet Employee Profiles Page. *Kerry Group_03_Profiles_live.png*

Employee Directory Highlights

1. **Robust profiles.** The company aims to provide comprehensive employee profiles to enable connections between employees and across SMEs and locations. With more information in each profile, people can learn more about each other; the site can also use the information to help connect people via search. The additional information makes the site's search capabilities stronger, as the site has more information about each individual's expertise.
2. **Expertise.** The profile starts with information about expertise, rather than contact information. A hierarchical listing of the employee's department, starting at Kerry and going down to the user's specific group, follows the employee's picture. The next column includes areas of expertise, which employees add to their own profiles. For example, an employee working on a new ice cream coating can add "coating" as something they know about.
3. **Follow.** Employees can follow one another, and track each other's activity on mykerry.
4. **Contact information.** Key contact information includes the employee's email, global extension, phone number, and mobile number.
5. **Recent activity.** The profile includes a snapshot of the user's most recent social activity on the site.
6. **Overview.** The bottom of the page contains a more detailed view of information about the employee. This includes a statement about what the employee is currently working on in the *Current Position* area, and detailed information about expertise and markets in the *Business Profile* section. People can expand and collapse the profile section as needed. Sections include *Core Details*, *Current Position*, *Skills*, *Significant Projects/Achievements*, *Professional/Industry Associations*, *Kerry Career History*, *Previous Employers*, *Personal Details*, and *Location*.
7. **Organizational chart.** The right side of the page includes a view of where the user falls within the organizational structure, showing who the employee reports to as well as who reports to the employee.
8. **Relationships.** The *People* and *In-Common* areas work to foster relationships across the organization. The *People* area shows who the employee is following as well as who is following that employee. The *In Common* area shows employees their shared connections in the organization. In this case, the employees share a common manager and six colleagues that they are both following.
9. **Updated information.** People are encouraged to complete all sections of the employee profile. A person's profile status is shown at the top of each intranet page as a reminder to people who may not have completed their full profile. If the profile is not 100% complete, both the employee and the employee's manager receive periodic and personalized email reminders about what needs to be added and why the person should fill in the information.

The site provides a quick reference sheet for employees so they understand what needs to be completed to achieve the 100% profile rating. To help with profile completion, the team opened the profile pages to employees about a month before the new site's launch so people could add information early. It also ran a campaign around filling in profiles to further encourage their completion. To get employees' profiles started, the site pulled existing information from a variety of sources.

Video

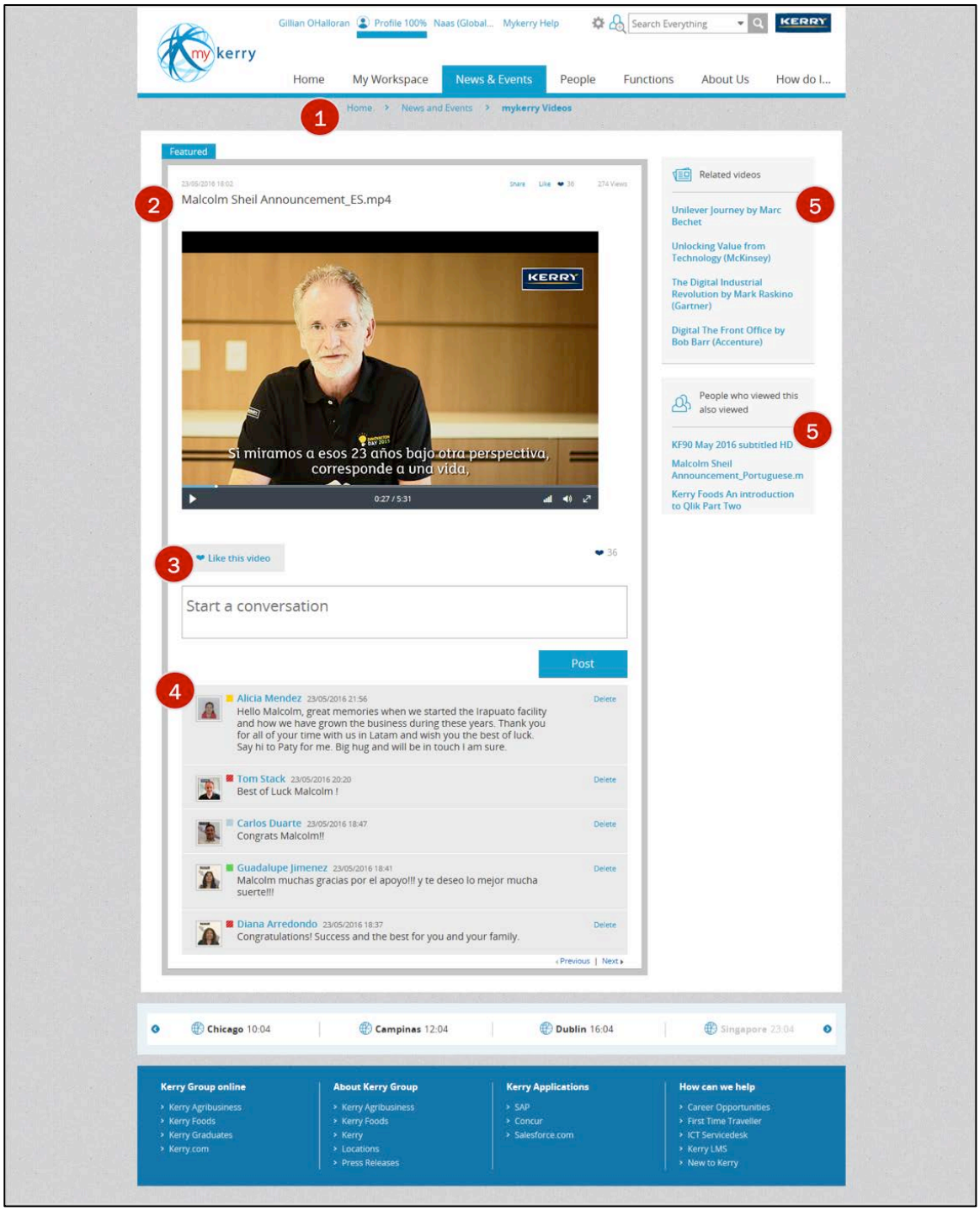


Image 103. Kerry Group Intranet Video Page. *Kerry Group_04_Video Functionality_live.png*

Video Highlights

1. **Video.** Video is a new addition to the site. Videos are featured in the site's *mykerry Videos* section, which appears within *News & Events*. Videos are also featured throughout the site and on the homepage, where a carousel of recent content appears.
2. **Details.** Each video page includes the date the content was posted along with the file name. The video's length is displayed below the image, where the time completed and time remaining are also shown. Videos play within the body of the page, rather than in a separate window.
3. **Likes and comments.** A clear and prominent *Like* button appears with each video, along with a heart icon and a number indicating how many likes the video has received. A large text field with the prompt text *Start a conversation* appears below, with a button to post a comment. This phrase is used throughout the site to invite people to add comments or post information.
4. **Latest comments.** Next, the latest comments about the video are shown. The contributor's picture and name are included, together with the date and time the comment was posted. Visitors can page through comments via the *Previous* and *Next* buttons at the bottom of the last comment.
5. **Recommended content.** The site's right column includes a list of related videos. This content is presented based on metadata and pulls content similar to the video being viewed. Following this is a section called *People who viewed this also viewed*. This list of recommended viewing is based on other visitors' behavior on the site. This is a good use of data about user activities to help people find information of interest.

Functions Hub

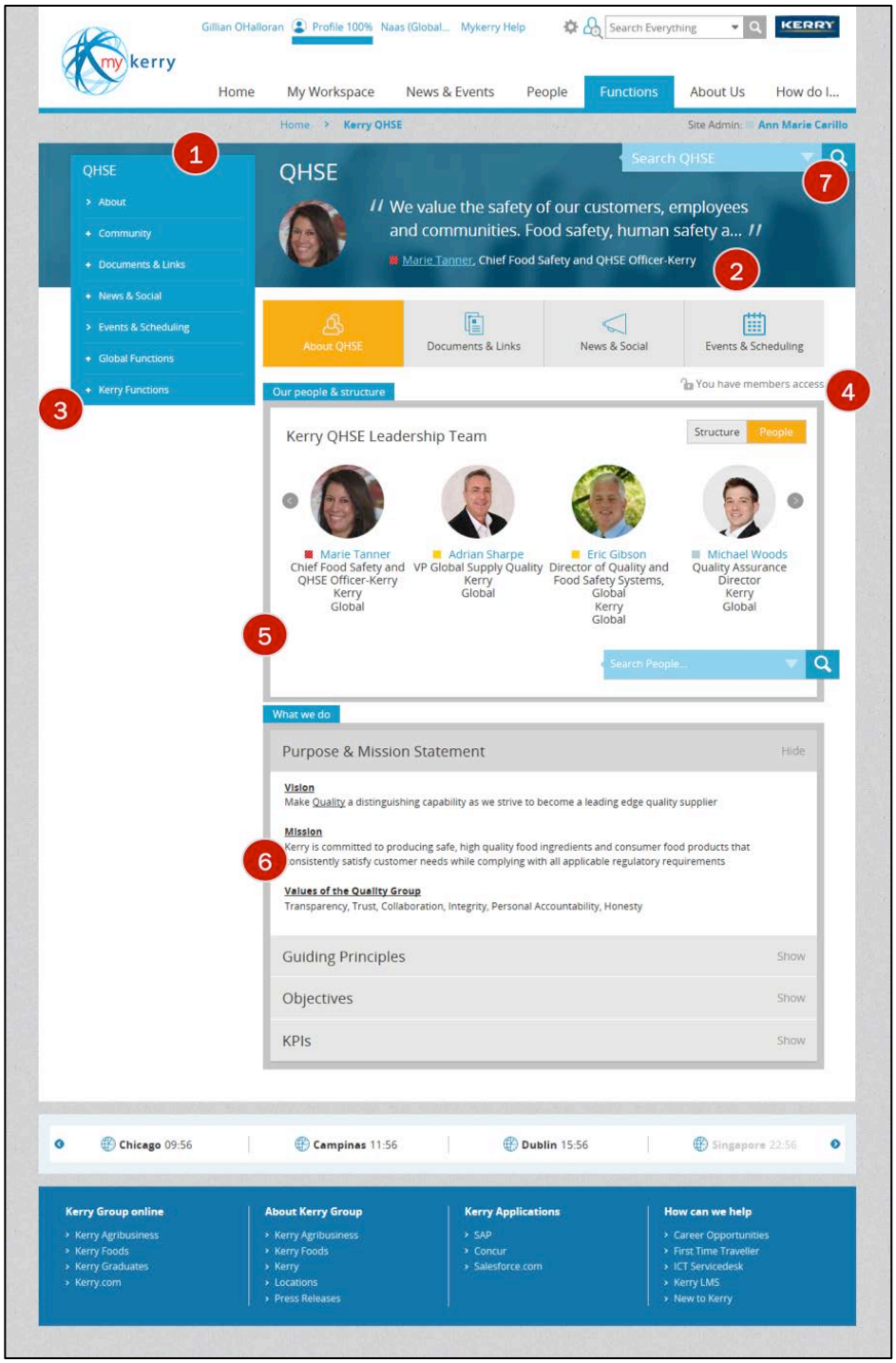


Image 104. Kerry Group Intranet Department Homepage. *Kerry Group_05_Function Hubs_live.png*

Functions Hub Highlights

1. ***Functions* hub.** In this portal area, different functions explain their role in the organization and share specific functional content and news with colleagues or the whole company. The portal lets members of various hubs communicate with each other and share information.
2. **Quote.** Each function page includes the function's name, a picture of a leader, and a quote, together with a link to that leader's profile.
3. **Secondary navigation.** The pages include navigation along the left side that lets visitors explore the hub. Key areas are also highlighted in boxes across the top of the page.
4. **Members.** Function members have extended access to the site. A lock in the corner indicates whether a user has member access or not. Members can access private areas that are open only to people within the function; these areas include discussion forums for sharing knowledge and posting to fellow employees.
5. **People and structure.** This section highlights the function's leadership team in a carousel that users can rotate via arrows on either side of the employee images. A toggle in the upper right lets users change the view from *People* to *Structure*. Under the images of the leaders is a blue search box that offers a quick way to search people within the team.
6. **Basic information.** This area contains information about the function's *Purpose & Mission Statement*, *Guiding Principles*, *Objectives*, and *KPIs* in an accordion structure, which is opened and closed via *Show* and *Hide* links.
7. **Local search.** A search specific to the group is included at the top of the page's content area to distinguish it from the site-wide search available at the top of each page. Filler text helps distinguish this search as well; here, it specifies the functional area — *Search QHSE* — in contrast to the *Search Everything* or *Search People* text in the page's other available search boxes.

DESIGN PROCESS AND USABILITY WORK

Design Approach

Various activities informed the design choices for the new intranet, including the following:

- **Selecting a design partner.** The first step on the design journey was to identify an external design partner with relevant expertise. The project steering team assessed several organizations, choosing a partner that had appropriate experience and skills, and was a good fit for Kerry Group.
- **Assembling a design team.** A multifunctional team was assembled to work with the design partner. This team included representation from senior executives; key functions such as HR, ICT, and Marketing; internal designers; and internal communications.
- **Conducting peer-company analysis.** The team began its research by looking at other companies' intranet designs and took cues from designs that seemed to work particularly well.
- **Determining critical requirements.** The team mapped out the new intranet's critical objectives and identified its required functionality; this was a key driver in the design process.
- **Holding persona workshops.** The team conducted workshops to identify the personas of potential users. To create a design that would reflect various user viewpoints, the team sought to determine what various users wanted to see and would find engaging, as well as to identify their needs, and so on.
- **Prioritizing content.** The team prioritized page content through activities such as card sorting. They enlisted employees from different functions and regions to help them define the IA.
- **Holding sketch sessions.** The design team took an iterative approach to page design and wireframing, holding sketch sessions where team members sketched out different approaches, then reviewed them with representative users.
- **Ensuring company branding.** Color schemes, logos, and the overall look and feel were critically assessed to ensure that they aligned with Kerry branding, both internally and externally.
- **Using interactive HTML.** As the design advanced, the team prepared a clickable prototype to show how a typical user could journey across the website. This was a particularly valuable demonstration tool.
- **Courting user acceptance and input.** Wireframes and prototypes were shown to user focus groups across the company's regions, to help the team hone, improve, and finalize the design.

IA Approach

The team focused strongly on getting the IA right. Because the company had large divisions and subdivisions, it was important to have a cohesive intranet that also incorporated the requirements of its many entities. The final design used several navigation mechanisms:

- **Meta navigation.** A small menu on the top, in blue text, that is secondary to the primary navigation. This meta navigation provides quick links to the employee's profile, location page, and help material. It also shows the percentage of the profile that is completed.
- **Megamenu.** On the previous intranet, this menu showed all the main navigation at once. However, the design team's research found that user reactions were very mixed toward the megamenu, so the team removed the megamenu when it did the redesign.
- **Side navigation.** This shows two layers of subnavigation beneath the main navigation.
- **Breadcrumbs.** This lets people easily navigate back up, as well as quickly understand the context of their location in the intranet.
- **Footer.** The footer provides quick links to frequently used applications and information.

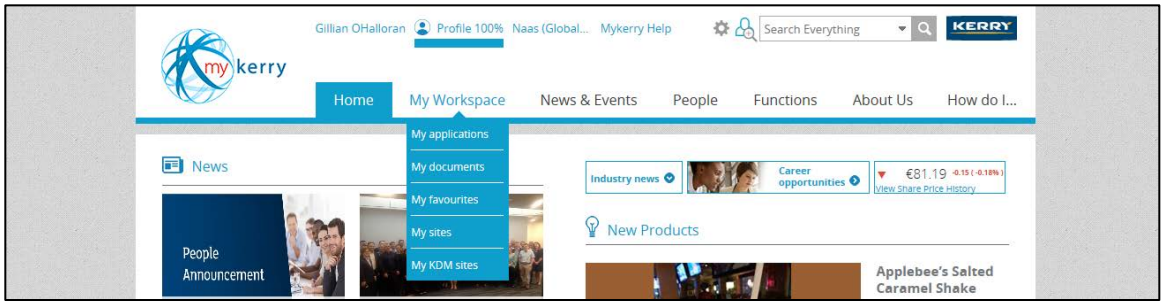


Image 105. Kerry Group Intranet Meta Navigation. At the top, in blue, the secondary navigation provides quick links to an employee's profile, location page, and help materials. It also shows the percentage of the profile that is completed. *Kerry Group_06_Navigation Header_live.png*

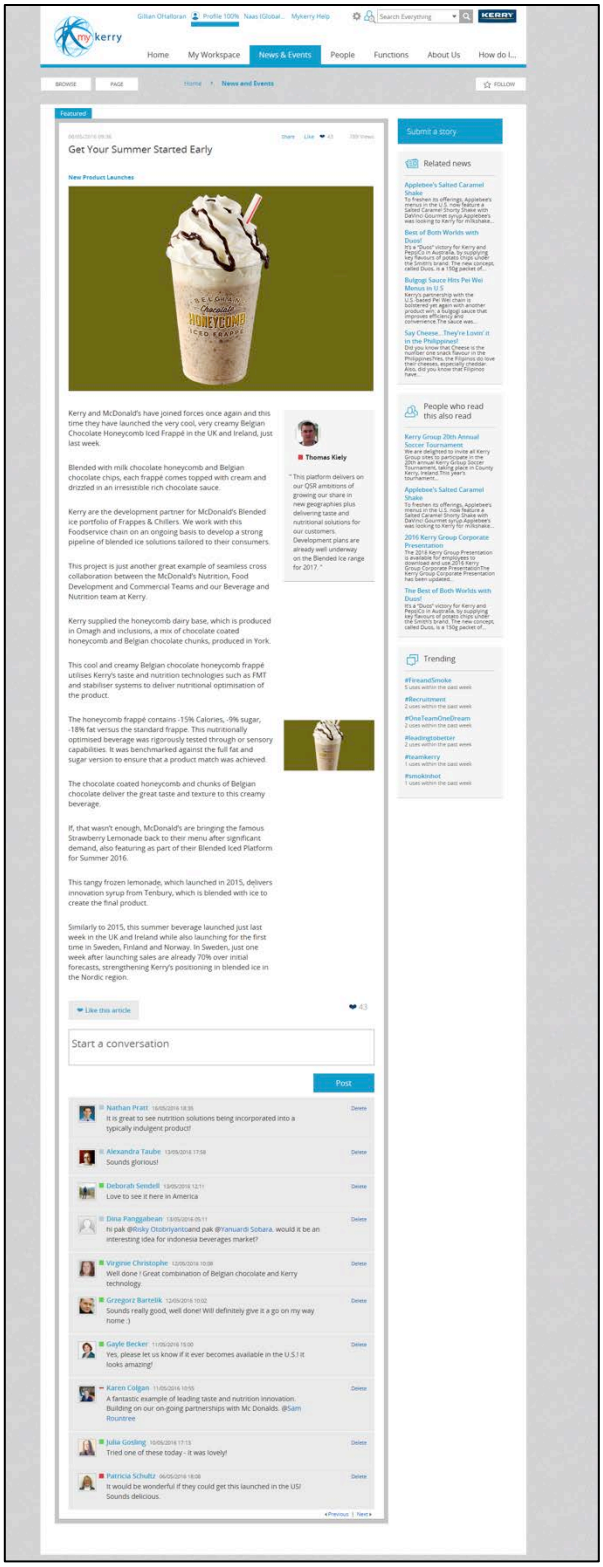


Image 106. Kerry Group Intranet News Story. This shows a typical news story, which employees can like, share, or comment on. *Kerry Group_07_News Story Social Feature_live.png*

Adoption and Buy-in

The Kerry Group team treated adoption as a serious issue to be planned for and accommodated throughout the rollout. Following are some of the approaches the team used to ensure the intranet was ultimately used and appreciated:

- **Get leaders on board.** The team had full buy-in from the company's senior leadership team and from the heads of key functions such as HR and ICT. One of the company's senior business leaders took an active role in the project's implementation, which was a major factor in its success. Further, most senior executives completed their employee profiles before the system went live to encourage others to do the same.
- **Try different approaches to entice people.** Moving from a custom Lotus Notes-based system to an up-to-date SharePoint solution was a big change for all of Kerry Group's users. Some embraced it quickly, while others took a little longer to acclimate.

  The intranet team tried many things to get people on board; the following approaches were most effective:

  - Create an animation introducing mykerry
  - Explain what the new intranet could do through roadshow presentations and town hall meetings across regions
  - Nominate mykerry super users and champions on key sites, giving mykerry an all-important local face to answer questions, resolve problems, and promote the new platform
  - Provide branded merchandise to help build mykerry's brand recognition
  - Make the intranet the default homepage for all employees — a small but crucial step toward adoption.
- **Train people.** Recorded training sessions were set up after go-live to help people get the most out of the new intranet. The training program also included a suite of training materials, including user guides, quick reference guides, and tips and tricks. Despite the availability of all these tools, many people tried to figure out the intranet on their own by simply exploring it. These explorations led to queries and helped identify additional training needs. This, in turn, helped the team realize that the training program and materials needed to evolve over time.
- **Customize when needed.** Out-of-the-box is not always the best solution to encourage technology use; the Kerry Group team learned that sometimes you need to spend a little more and customize the UI design of critical functionality to make it more usable. For example, completing people profiles was an initial key requirement of employees, yet the interface to do it was clunky and unfamiliar to many people. This led to some initial frustrations. To address them, the team had to make the software easier to use.

- **The adoption program never ends.** The adoption program must continue indefinitely, as people's intranet needs evolve and new people join the organization. This is important to bear in mind: don't plan for a one-off training program at launch. Rather, plan for continuous training and awareness-raising year in and year out.

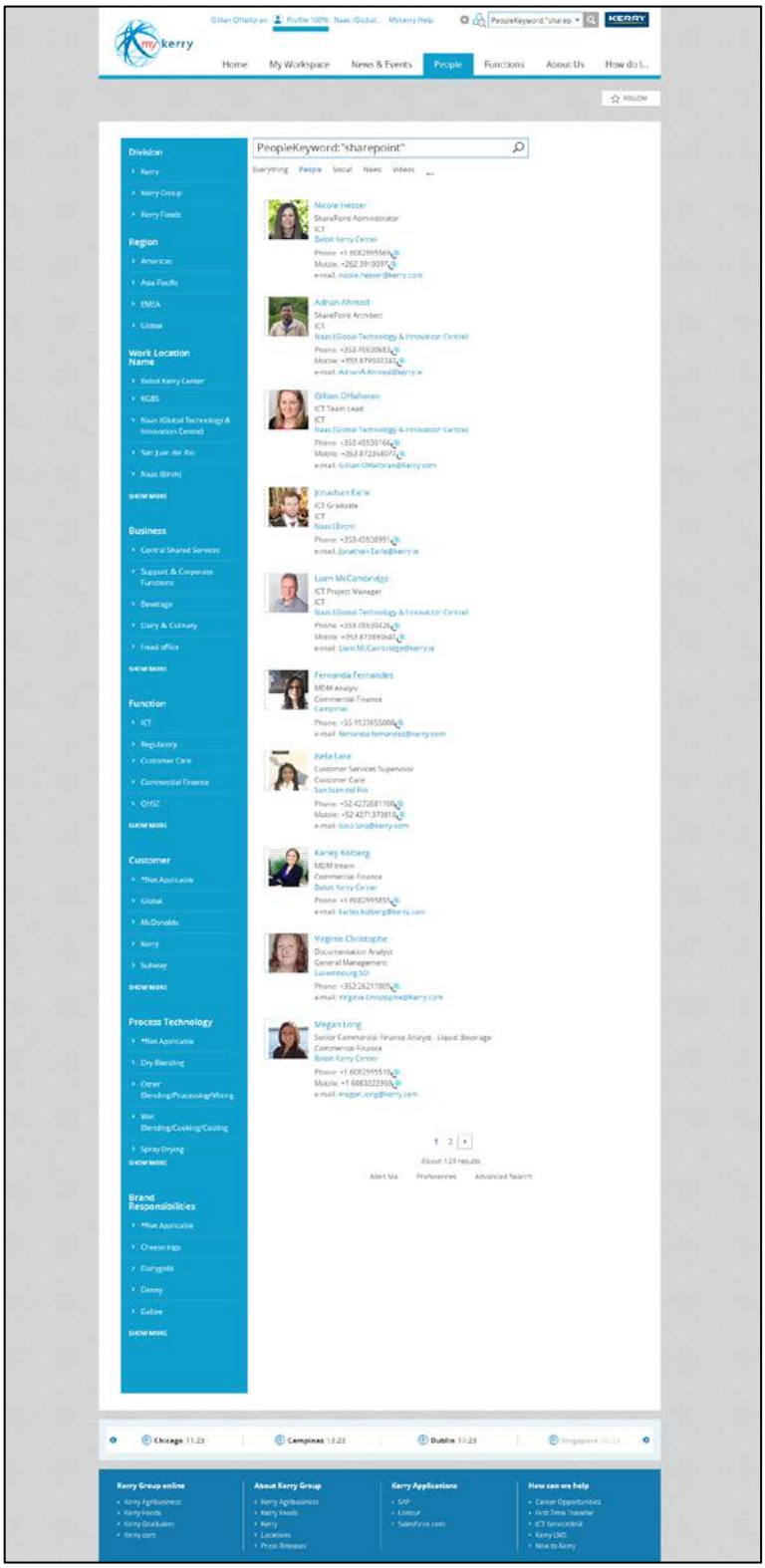


Image 107. Kerry Group Intranet Search Results. This shows the main results screen that users see after searching for a particular person in the company directory. This page lets users IM the person directly from the listing. It also offers an email link, along with personal and professional information. *Kerry_Group_08_Search_Results_live.png*

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
iQ Content (now: Each & Other) A UX design and research consultancy	**Initial Launch of mykerry:** • Designed the IA, conducted card sorts with relevant user groups, and so on • Designed wireframes and graphics • Implemented HTML page design
Storm	• Developed SharePoint solutions
Sequel	**Homepage resign phase:** • Designed wireframes and graphics • Implemented HTML page design
Avanade (Accenture)	• Developed SharePoint solutions

GOVERNANCE

The ultimate owners of the mykerry intranet are the Kerry Group businesses. This is demonstrated by the fact that the intranet sponsors are the organization's most senior executives. Communications, HR, and ICT jointly own the intranet's ongoing development and administration.

Having business representatives and multiple functions involved in intranet ownership has been very positive. With so many opinions and ideas, the team feels that the end result is a very well-rounded intranet. This model has also forced the organization to have a clear governance structure so that all requests and requirements are reviewed appropriately and scheduled for delivery depending on priority assigned by the group, resulting (hopefully) in no angry customers around delivery time. The involvement of such high-level stakeholders also means that the intranet team has support from people on the ground in every region who are advocating for mykerry and driving it forward all the time.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Executive Sponsorship	• Account for the success of mykerry • Actively advocate for and visibly sponsor mykerry • Nominate executive leads • Oversee nomination of function leadership • Represent senior executive and business and functional leads
Executive Leadership	• Advocate for and sponsor mykerry at meetings • Ensure appropriate support structures are in place for the success of mykerry • Determine governance priorities: affirm the message, time, resources, and support, and engage with the strategy
Function Leadership	• Advocate for and promote mykerry • Ensure the implementation and success of mykerry in their business area • Remove obstacles to mykerry adoption • Provide regular updates on adoption progress and encourage feedback • Apply standards, promote best practice, and escalate issues to executive leads • Work with the core team to deliver implementation and enhancements
Core Team	• Provide governance, program management, coaching, support, and evaluation of mykerry • Ensure that content and features are available on the group intranet level
Super Users	• Work with the intranet core team to prioritize changes and enhancements and test new functionality • Promote and drive adoption in their region • Encourage employees in their region to complete their profiles • Support the Site Champions, who provide

	the first line of support to employees • Act as a go-to person for Champions: answer any questions about the intranet in their region • Train and support content owners
Site Champions	• Ensure that location pages are up-to-date and consistent • Act as the first port of call for all employee queries at their location • Educate and train employees on how to navigate and use the intranet; communicate new changes and updates • Collate feedback and suggestions from their location back into the core team
Content Owners	• Update their sections and ensure consistency • Delegate some updates and changes to other members of their team or department

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	• http://mykerry/Pages/default.aspx • **Mobile URL:** https://mykerry.kerry.com/Pages/default.aspx
Default Status	• mykerry is set as each employee's homepage; this is a global policy, and the homepage cannot be changed. • The mobile URL is pushed down as a bookmarked icon to employee's home screens on all company phones and tablets. • People can also bookmark the URL on their personal phones.
Remote Access	• People can use the mobile URL to access the intranet remotely, without being connected to the Kerry network. This is especially useful for sales and marketing teams, who are often out visiting customers and exhibiting at trade shows. This easy intranet access lets them stay connected with what's going on internally and also easily collaborate and access documentation while on the move.
Shared Workstations or Kiosks	• Factory-based employees access mykerry via shared workstations (where available). • All of the manufacturing locations' processes and procedures are stored on the intranet, and this documentation is regularly accessed and referenced throughout the day. (Access to this documentation is particularly important when auditors visit.) • The intranet also stores key regulatory documentation, such as product specifications and safety data sheets. • Factory employees also use the intranet to find people through the site's extensive search functionality and to stay up-to-date on all company news and events.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2000	First company intranet built on Lotus Notes technology
2004	SharePoint 2007 was leveraged across Kerry Group for project teams document and information repositories
2007	Lotus Notes intranet design and functionality upgraded
2012	Collaboration and team sites launched in SharePoint 2010 as a first pilot of collaboration functionality
February 2013–October 2013	Launch of new intranet on SharePoint 2013 platform complete with enterprise collaboration suite
September–October 2015	Launch of new homepage redesign

CONTENT AND CONTENT CONTRIBUTORS

Contributors

Kerry Group has a team dedicated to communications in every business region — Europe, the Middle East and Africa (EMEA); LATAM; Asia Pacific (APAC); North America; and Foods & Global. Members of this team play a big part in sourcing content for their region, especially news content. In addition to these contributors, any employee, function, project, or team can submit news stories to the intranet. The relevant regional Communications Team member has publishing rights and must approve all content. Should a regional news story be deemed interesting for the whole of Kerry Group, the Group Communications Team can upgrade it accordingly.

The Group Communications Team meets regularly to discuss intranet issues and mykerry content specifically. Promoting mykerry and mykerry content is a significant part of team members' job function, so they have the final say on if, and when, content is published. This workflow ensures a certain level of control and oversight over all news content published on mykerry. A Group-wide editorial calendar helps the team manage content planning and avoid duplication; news is targeted to employees, depending on their job roles and where they are based.

For other, non-news content, various people own pages. For example, the Group Sustainability Manager owns mykerry's *Sustainability* section and is the only person who has editing rights for those pages; any changes must go through that manager.

Contribution

The intranet team seeks out contributors, but it also tries to encourage employees to submit content themselves. This effort is aimed at creating a culture of ownership. Team members want various contributors to feel that they own and are responsible for content, and that they can have influence as a result. Contributors who feel this sense of ownership are far more likely to take their accountability seriously.

The team also engages with SMEs on various topics, checking in with them regularly and encouraging them to submit content. Whenever possible, the intranet team calls on contributors to provide regular updates to the site. For example, the company's Learning Academy sends information on upcoming trainings to post as mykerry content. The Marketing Team also contributes stories. Each week, a member of that team submits a story about a new product, and this regular contribution is factored into the site's editorial calendar. Such a relationship not only serves the intranet — by having a regular schedule of predefined content — it has also helped intranet team members forge strong relationships with Marketing staff members, who now approach them with new, unsolicited content.

The team also runs regular mini-campaigns — on mykerry and through newsletters, emails, and word of mouth — that encourage employees to submit content.

Training

Training for mykerry is something the team takes very seriously. The training methods and tools for mykerry are owned and administered by the Kerry Group Learning Academy, in close conjunction with the mykerry Steering Committee and the Communications Team. Because different employees have different proficiency with mykerry, team members have committed to constantly finding ways to help company employees use different functionalities on the site. They also reach out to people in other ways, including the following:

- **New hires.** The intranet team has prepared training materials for new hires so that they can get the most out of the intranet from their very first day.
- **News items.** The team makes an effort to ensure that the process for submitting a news item is as simple as possible; it also created a one-page quick guide on how to do it.
- **Help.** At the top of the homepage is a quick link to *mykerry help*, where visitors can find information on how to use all the elements of the intranet. Available training materials include how-to videos, slides, recordings, and Quick Reference Guides. People can also filter results based on whether they consider themselves a beginning, intermediate, or advanced user.

Management

The Communications Team ultimately manages all content, but content in each region is owned by the Communications Team in that region. As communication professionals, team members work alongside contributors to make sure all content is accurate, appropriate, well edited, and up-to-date.

For Kerry Group-wide content, page owners are responsible for doing the same, and can enlist the help of the Group Communications Team as needed. For example, mykerry's section on the Bike to Work program is owned by the HR Team, but that team works with the Communications Team to decide what content is most appropriate and how to best present it; the HR Team also got help initially to learn how to upload content.

Quality

Ensuring high-level usability and efficiency is something team members think about a lot, because they want users to keep coming back every day and for mykerry to be the go-to place for information.

"It has taken a lot of effort and enthusiasm from the mykerry Communications Team to make sure that quality is maintained," says Communications Executive Gemma Lougheed. "One effective way we have found is to safeguard strong sponsorship and participation from senior leadership. If content is regularly read and endorsed by senior leadership, then content owners are far more likely to instinctively want their content to be of a high quality."

The way team members engage with SMEs is related to how they deal with other groups of content contributors. The SMEs have expert knowledge of their subject area, and they sometimes have a particularly technical angle or way of approaching the topic. In such cases, Communications Team members can work with them to distill the information and translate it into nontechnical language. "Where possible," Lougheed says, "we give authors plenty of time and resources to meet their obligations."

The Communications Team promotes the use of plain, easily understood and digestible English. It wants web writing to be high quality, so it endorses short, snappy article headlines, clear paragraphs, and interesting quotes from people.

Another simple quality control measure is to always ask simple questions about proposed content, such as: *Is this interesting for our users? Why do they need to know this? What is the benefit for the business?*

"Answering questions like these helps us to focus on improving content," says Lougheed, "rather than producing content for the sake of it."



Image 108. Kerry Group Intranet Content Page. *Kerry Group_09_Content Page_live.png*

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Four web and four application servers, and two SQL database servers (both SQL clustered) • Intel Xeon CPU E5-2620 v2 @ 2.10GHz, 8 cores, 64 GB RAM • Windows Server 2008 R2 Enterprise
Bug Tracking/Quality Assurance	• Visual Studio Online, IE Developer Toolbar, Fiddler, SharePoint Code Analysis Framework, Avanade Code Analysis Tool, SPDispose Check
Design Tools	• Visual Studio IDE, Photoshop, SharePoint Designer
Site Building Tools	• SharePoint 2013, Visual Studio, SharePoint Designer, HTML Editor, Gulp, Sprite, Node.js, JavaScript minifier, FxCop, Content Delivery Network (CDN)
Content Management Tools	• AvePoint Migrator, PowerShell, SharePoint CMS
Search	• SharePoint 2013 Search
Other Functions	• Azure Application Insights for site tracking, Azure CDN for static content, Azure Media Services for global video hosting solution, Factiva Integration to integrate industry news with the intranet, share price Integration, ICIMS Integration to show career opportunities, and so on

ROI

Tracking Metrics

The Kerry Group team tracks many aspects of its intranet usage to keep an eye on trends. These measurements include the following:

- **Total population:** The number of unique users per month as a percentage of the total employee population and, out of this, the number of social users (providing likes, comments, posts, etc.) and mobile users.
- **Users by country:** The number of unique users by country.

- **Social:** Total contributions, broken down by comments, likes, shares, and the number of mobile users.
- **News:** The number of likes, comments, views, and shares, both as a total number and segmented by news category type.
- **Video:** Total number of likes, comments, views, and shares.
- **Device usage:** Tracks intranet users by access device (desktop, tablet, or smartphone).
- **Terms acceptance:** The number of people who have accepted the site's *Terms & Conditions*.
- **Search:** Total number of searches, broken down by categories (people, news, etc.); top-searched terms; and search results that return no matches. The team also runs system reports that cover search activities in detail, using the following qualifiers:
    - Number of queries performed
    - Top queries by day
    - Abandoned queries by day
    - Abandoned queries by month
    - No-result queries by day
    - No-result queries by month
    - Query rule usage by day
    - Query rule usage by month
- **Additional metrics:** Homepage hits, top five pages visited, average time spent on site per user, average pages per user per visit.

Softer Measures

The intranet team also tracks softer measures to keep a pulse on how the site is being received. These measures include the following:

- **User satisfaction.** The team puts a premium on user satisfaction as tracked by word of mouth. Also, because leaders at the highest level are tightly involved in the intranet, team members can simply ask them what they think of mykerry and various enhancements the team has carried out.
- **Pulse gauging.** From time to time, team members engage in "pulse gauging" activities. These are typically surveys (conducted via Survey Monkey) that the team uses to get feedback on specific enhancements. Another softer measure they track is the star-ratings earned on intranet pages. Here, users can rate their overall approval of pages; this gives the team an informal way to gauge employees' approval of page content and design throughout the site.

- **Annual survey.** A more formal measure of intranet satisfaction is the annual ICT survey, which asks all computer users in the organization for feedback on their ICT experience. The survey allocates an entire section solely to questions about mykerry. This means that, each year, the company asks all PC users 6–10 questions specifically about the intranet, which gives the intranet team key feedback data it can track year over year. The questions cover topics such as satisfaction with performance, functionality, and design; identification of user issues; and suggestions for improvements. This annual ICT survey is a well-established and respected tool, so team members feel they can strongly rely on the responses they receive from it.

LESSONS LEARNED

Lessons Learned

Tony Bergin, Group Internal Communications Manager, describes some of the key lessons the team learned through their redesign efforts:

- **Study other company's intranets.** "Carrying out a good due diligence of other organization's intranets was a key learning point in the whole process, as was seeking advice from design teams who had experience of what works well and what doesn't."
- **Choose a designer who is willing to listen.** "Having a designer who listens to user requirements and really understands the organization's needs was essential."
- **Take time to involve people prior to launch.** "In order to hit your go-live deadline, you are likely to be limited in the amount of user feedback and input you can solicit before an intranet goes live. Take as much time to garner feedback as possible. It irons out the kinks that can really annoy users."
- **It's never too late to involve people.** "We viewed our new intranet design as an interactive approach that potentially would require tweaking even after go-live. We therefore engaged independent focus groups from across the business to give feedback. We took this feedback and applied updates to some elements of the homepage design that proved universally positive to the intranet audience."

Best Practices

The team also has some best practice advice that other teams can apply to their own intranet projects:

- **Communicate early and often.** "The main piece of advice we would give to others starting out on a redesign project is to continuously talk to others who have experience. Ask them what works well and what doesn't. Think about what the needs of your organization are and liaise regularly other key departments."

- **Continue to develop and improve.** "Something to always bear in mind is that a good intranet will constantly need to be tweaked and updated in order to improve. Therefore, think about what is most important for your go-live and, consequently, what could wait to be improved on at a later date. With this in mind, have your plan in place, but also schedule time for unforeseen mishaps."
- **Involve leaders from day one.** "Our intranet redesign project would not have worked if we had not kept senior leaders briefed, so that they knew what to expect and were on board from day one."
- **Get buy-in from above.** "Having the buy-in and proactive involvement and support of senior executives, both from the business and key functions such as HR and ICT, was a huge benefit to the project. This enabled critical decisions to be made more easily, ensured adequate resources were available, and meant we had some high-level champions when mykerry went live."
- **Appoint a project manager.** "Having a designated, independent project manager helped keep everything on track and kept everyone on the team honest on their deliverables. Aligned to that is the importance of a dedicated, internal multidisciplinary project team: vital so that everyone works towards the same goals."
- **Engage with people.** "Constantly engaging with users was also imperative, to have them at the forefront of what we were doing all the time in order to keep mykerry as user friendly as possible."

Latvian Railway: State Joint Stock Company "Latvijas dzelzceļš"

OVERVIEW

COMPANY

Latvian Railway Group consists of the holding company SJSC Latvijas dzelzceļš and six subsidiaries: JSC LatRailNet, which determines cost infrastructure usage (such as cost and prices) and allocation of the railway infrastructure capacity; LDz Cargo LLC, which ensures railway cargo transportation and international passenger transportation; the infrastructure construction and maintenance company, LDz Infrastruktūra LLC; the rolling stock repair and maintenance company, LDz Ritošā sastāva serviss LLC; and the security company, LDz Apsardze LLC.

Latvijas dzelzceļš has been the leader in Baltic states transported freight, by volume, for almost 10 years.

Latvian Railway Group employs 12,000, or 1.38% of the country's employed residents.

The main freight line runs from the Latvian eastern border with Russia and Belarus toward three of Latvia's biggest ports: Riga, Ventspils, and Liepaja. The main categories of transported goods include coal, oil, and oil products from Latvian ports. These products then continue on to factories, primarily in Germany and France.

Headquarters: Riga, Latvia

Company locations: All across Latvia

Locations where people use the intranet: At all Latvian Railway locations

Annual revenue: Joint Stock Company Latvijas Dzelzceļš: €217.8 million in 2015 (euros)

THE INTRANET

Users: Approximately 6,500 employees in the holding company Latvijas dzelzceļš use the intranet.

Mobile approach: Full intranet functionality has been adapted to mobile screens, smartphones, and tablets through responsive web design.

Technology platform: Drupal

TEAM

There was no internal design or development team.

Two internal staff members took part in the project: Toms Kalnītis, Product Owner, Communications; and Jurģis Gaigals, IT Development Manager.

Wunderkraut Latvia team

Design: Henrijs Šešo

Continuous design work: Sanita Ločmele

Development, maintenance, and support: Jānis Bebrītis, Gatis Rudiņš

Additional development: Mārtiņš Bērtiņš, Artis Bajārs

Project management: Ernests Gabrāns

Account manager and continuous development project manager: Līva Otvare

INTRANET TEAM



Team members shown here (left to right): Jānis Bebrītis, Jurģis Gaigals, Artis Bajārs, Sanita Ločmele, Toms Kalnītis, Līva Otvare, Gatis Rudiņš, Ernests Gabrāns, and Henrijs Šešo.

HIGHLIGHTS ABOUT THIS WINNER

The Latvian Railway intranet supports the 6,500 employees of the State Joint Stock Company, as well as employees in all parts of the holding company, which has 12,000 employees overall. The project set out to create an easy-to-use system for everyday work, with a single interface that let people access all the tools and information they needed without having to seek out multiple sources. The previous design, which was cluttered and difficult to use, could not be revamped due to technology and design limitations, so a new site was created using Drupal.

- **Integration.** The site integrates several different systems from around the organization. A single system supports tasks ranging from inventory to vacation planning to ordering printer cartridges.

- **Responsive design.** The previous intranet was available only to employees who had a workspace with a PC. This meant that employees without regular access received information via a print journal, or they did not receive corporate information at all. Now all employees can access the full intranet, which is available on mobile devices or computers. The organization sees this improved communication as a way to increase employees' company loyalty.
- **Content.** Organizing content was a challenge in the redesign. The team met with all departments to understand their needs and to determine how best to sort and organize site information in a way that met those needs while also making sense to users.

BACKGROUND

The main goal of the intranet redesign was to create a single interface through which users could quickly and easily access and process all of the important information necessary for their work. The organization also wanted to improve the intranet's functionality to reach its business goals for the platform, which included the following:

- Increase the number of users
- Optimize the UX by developing employee self-service tools
- Raise employee awareness of current events
- Provide a platform for eliciting employee feedback on topics

Another critical need was to expand the intranet's reach; the existing intranet served only company employees who work at a traditional office-based workstation equipped with a PC. This population encompasses only 3,500 of the organization's 12,000 employees.

It was clear that a modern intranet was needed to help the organization reach its goals. The team therefore considered various options before settling on a complete redesign using Drupal. Team members considered the option of trying to improve the existing platform, but after looking at the idea critically, they understood that this path would create limitations in both design and functionality. They also considered several licensed solutions, but the Drupal approach seemed best for a few fundamental reasons. The company's IT department had previous successful experience implementing Drupal-based websites and information systems. Also, the company policy is to show preference for open source solutions. Thus, Drupal quickly emerged as the right platform on which to develop the new intranet.

With the newly redesigned intranet up and running, company employees now use one interface to access many systems. Further, everything they need to accomplish their everyday work is integrated within a unified intranet platform.

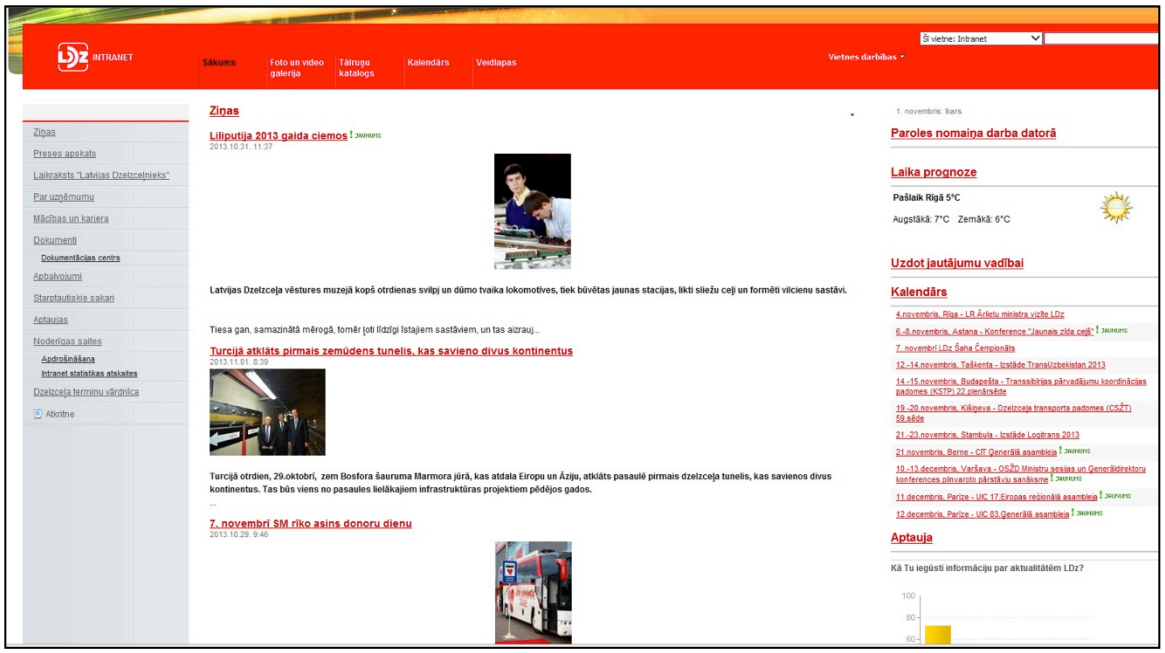


Image 109. Latvian Railway Intranet Old Homepage.
LDz_01_old_intranet.jpg

Challenges

The team faced a host of challenges with the intranet project — some broad, and some specific and vexing. These challenges included the following:

- **Content organization.** One of the project's major challenges was reaching agreement on content design and organization. Many stakeholders were involved: the Communication department, the Legal department (responsible for the documents section), and the HR department (responsible for the contracts section and the vacation schedules). Each of these stakeholders had their own interests and priorities, and all of them had to be taken into account. It was quite challenging to sort and organize information in a way that was both reasonable and equally satisfying for all parties involved.
- **Data migration.** The previous intranet platform had implemented nonstandard functionality, so it wasn't possible to complete data migration in a standard way. After consulting with the Railway's support person, the developer created a solution that migrated the data correctly and precisely, including special Latvian diacritical marks (such as for letters ā, ņ, and č).
- **Contact catalogue technical constraints.** One of the project's technical challenges was the contact catalogue, a tool that contains contact information about each employee. Team members encountered technical limitations that kept them from making it work the way it had been designed. For example, it was difficult to add

several positions for one person if each position had a separate phone number. It was also difficult to show an alternate contact if the person was inaccessible. Although a complicated SAP HR structure was in place from the start, the team had to find a solution to display profile information in a way that is easy for site users to understand.

- **Drupal integration with SharePoint.** Another challenging task was integrating Drupal with the SharePoint portal, where the *Documentation* center is located. It was important for the new intranet to provide incentives to increase people's interest in materials available in the digital library (books and magazines), but trying to accomplish this created technical challenges.
- **Distributed team management.** Many members of the intranet team worked remotely so they had to communicate and collaborate through online tools and hold meetings in Google Hangouts or other video conferencing environments. This approach was effective, but it required a lot of ongoing coordination.
- **Prioritization of needs.** Creating the intranet content involved several stakeholders — the Communication, Legal, and International departments — and it was important to understand each group's specific needs. To accomplish this, the team met with representatives of each department to discuss their content needs and try to understand which functions were most important, as well as which information should be prioritized on the page. In an effort to understand content needs from a user perspective, the design team also analyzed data related to user flow and studied how people were using the existing intranet.
- **Strong offline content competing with online content.** One challenge involved in deciding how to organize the site was related to the project's goal of ensuring people would pay attention to information about both company events and organizational growth, in addition to their own individual interests. For example, a popular internal company magazine was published once a week, providing one print copy for every 10 employees. The goal was for the intranet to become more popular than the magazine so the company could decrease the number of printed copies and eventually stop publishing it altogether. The team found that the real challenge here is that no matter how modern or user friendly the intranet becomes, some employees still prefer to receive their news in print (whether because of age, habits, or an inability to access the intranet). As a result, the printed version still exists. Acknowledging that change happens slowly, the team is taking steps to migrate these people gradually as the intranet evolves.
- **Many stakeholders to please.** Another challenge was that the number of stakeholders was quite high, and it was difficult to combine the needs of everyone into an equally satisfying product.

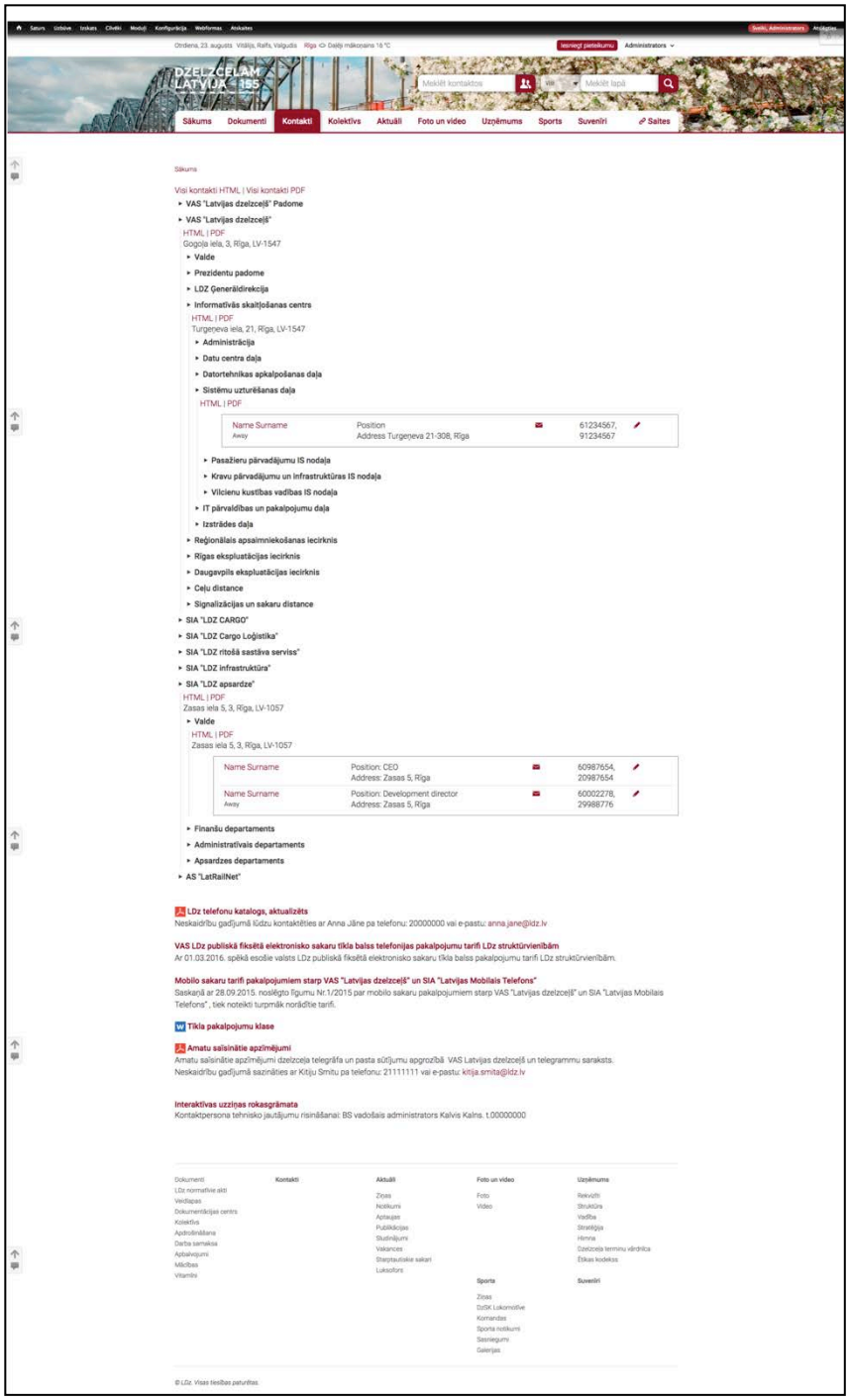


Image 110. Latvian Railway Intranet Contact Catalog. This view shows the branched tree structure and the information that is contained in each branch of the contact catalog. *LDz_02_contact_catalog_structure_live.png*

DESIGN REVIEW

Homepage



Image 111. Latvian Railway Intranet Homepage
LDZ_03_new_intranet_live.png

Homepage Highlights

1. **Look and feel.** The site incorporates images at the top of pages, both with news stories and in image galleries. The use of pictures combines with sufficient white space to create a clean design. Images show real railway locations, employees, and events rather than relying on stock imagery.
2. **Navigation.** Navigational categories appear at the top of the page. The user's current location is indicated with a red background and white text, in contrast to the other categories presented in red text with white background. The navigational categories are
    - ***Home***
    - ***Documents***
    - ***Contacts***
    - ***Collective*:** Information for all employees, including health insurance, available courses, awards, and salary information
    - ***Actual News*:** News that is important at the moment, including the latest news, events, newspaper articles, employee advertisements, and job openings
    - ***Photos and Videos***
    - ***Company***
    - ***Sports***
    - ***Souvenirs*:** An online shop for Latvian Railway-related goods (available only for assigned users)
3. **Search.** Each page of the site includes a text box for the employee directory search and site search. Icons and filler text help distinguish one from the other, with an icon of people for employee search and of a magnifying glass for site search.
4. **News.** News stories are featured prominently on the homepage, and the main news story is accompanied by a photograph. All news items are clearly dated, which helps visitors know which information is new and shows that intranet content is updated regularly. Each story includes an icon showing the number of views and the number of stars. The main news story includes a brief summary, while the others use descriptive headlines.
5. **Publications and galleries.** Beneath the news stories, the organization's latest publications are featured, with an image, title, and link to the publication. Beneath publications are galleries with images from events and promotions, such as health days and railway parades.
6. **Vacancies.** The right side of the page starts with information about job openings at the organization. The link is presented with the number of current openings.
7. **Availability.** Availability information shows the status of various information systems, showing planned downtimes and restored service. Green indicates a

restored service, yellow indicates a system is partially available, and red indicates a system is down. The information is prominent on the site so employees know when systems are not fully functional. This helps prevent unnecessary calls to the help desk about the problem. Each status update is accompanied by a brief description of what is or is not working.

8. **Information and calendar.** Below availability is an area for sharing important information, such as information about the annual Summer Express, and a calendar of events.
9. **New documents.** The final section on the right side is a list of the most recently updated documents available on the site, together with the date the item was updated and a brief description.
10. **Footer.** Each page on the site includes a footer with the main categories and subcategories of the site navigation, giving visitors quick access to information from the bottom of the page.

Mobile



Image 112. Latvian Railway Intranet Mobile View. *LDZ_04_home_mobile_live.png*

Mobile Highlights

1. **Navigation menu.** The site's mobile view uses a three-line hamburger menu to hide the site navigation. The icon is labeled "Izvēlne," which means "menu" in Latvian. Using a clear label for navigation, rather than an icon alone, makes the menu easier for people to find.
2. **Search.** The desktop view's open search fields are condensed into a link for "Meklēt" (search), accompanied by a magnifying glass icon. The lack of clutter makes the icons for both navigation and search easy to find. The labels and icons are also a good size for touch targets.
3. **Content priority.** The site's mobile view contains identical information to the desktop view, simply stacked for the mobile screen. The content is organized by priority: starting with news, then publications, then galleries. The desktop view's left-column information — including vacancies, calendar, and recent documents — follows at the bottom of the page.
4. **Footer.** The desktop view's footer remains as well, giving visitors quick access to site navigation. The footer plays an even more important role on mobile designs than on desktop. Exposing navigation in the page footer gives users who have scrolled to the bottom of a long mobile page quick access to navigation; it also exposes the navigation to users who did not see (or know how to use) the hamburger menu.

Contact Catalog

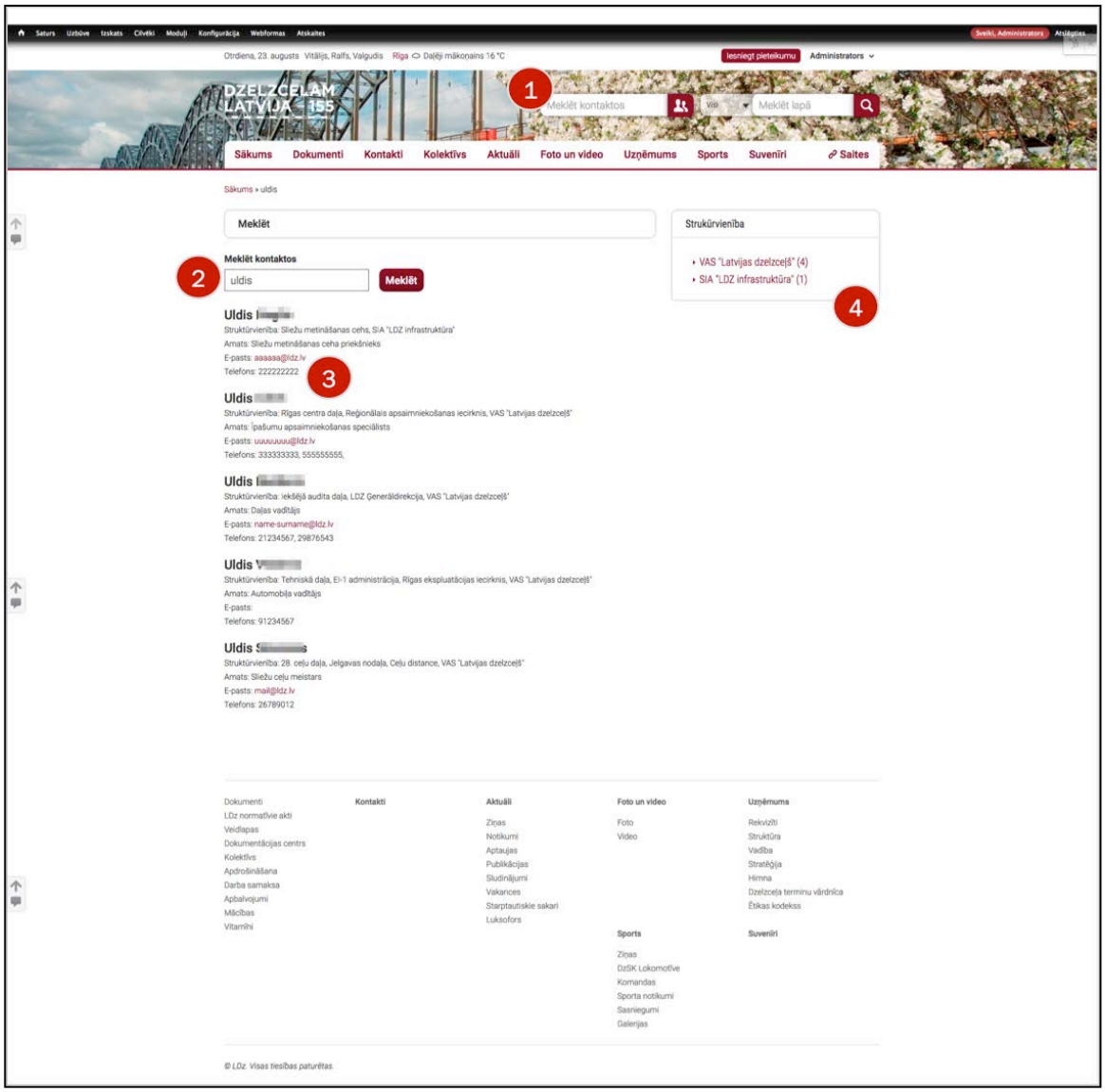


Image 113. Latvian Railway Intranet Contact Catalog.
LDX_05_contact_catalog_search_live.png

Contact Catalog Highlights

1. **Contact catalog.** The contact catalog is the employee directory for the organization. Creating the tool was challenging; it had to support several positions for a single person and allow each position to include a separate phone number. The tool also had to accommodate alternative contact information for when the employee is unavailable. The underlying SAP HR structure was complex, and the team needed to simplify it so employees could use it.
2. **Criteria.** Employees can search by any information available in an employee's contact card (user profile). This information includes name, phone, email, work address, availability (when the employee will be away from work), and who can substitute for the employee in case of absence. Employees can also search by department. The employee search appears at the top of each page of the site.
3. **Results.** Search results show the people matching the query, together with their contact information. Results list the user's department, office, email, and telephone number.
4. **Filter.** The right side of the page allows people to filter by department and move quickly and directly to the correct contact information. Each department is followed by the number of results in that department.

Alkotester Results

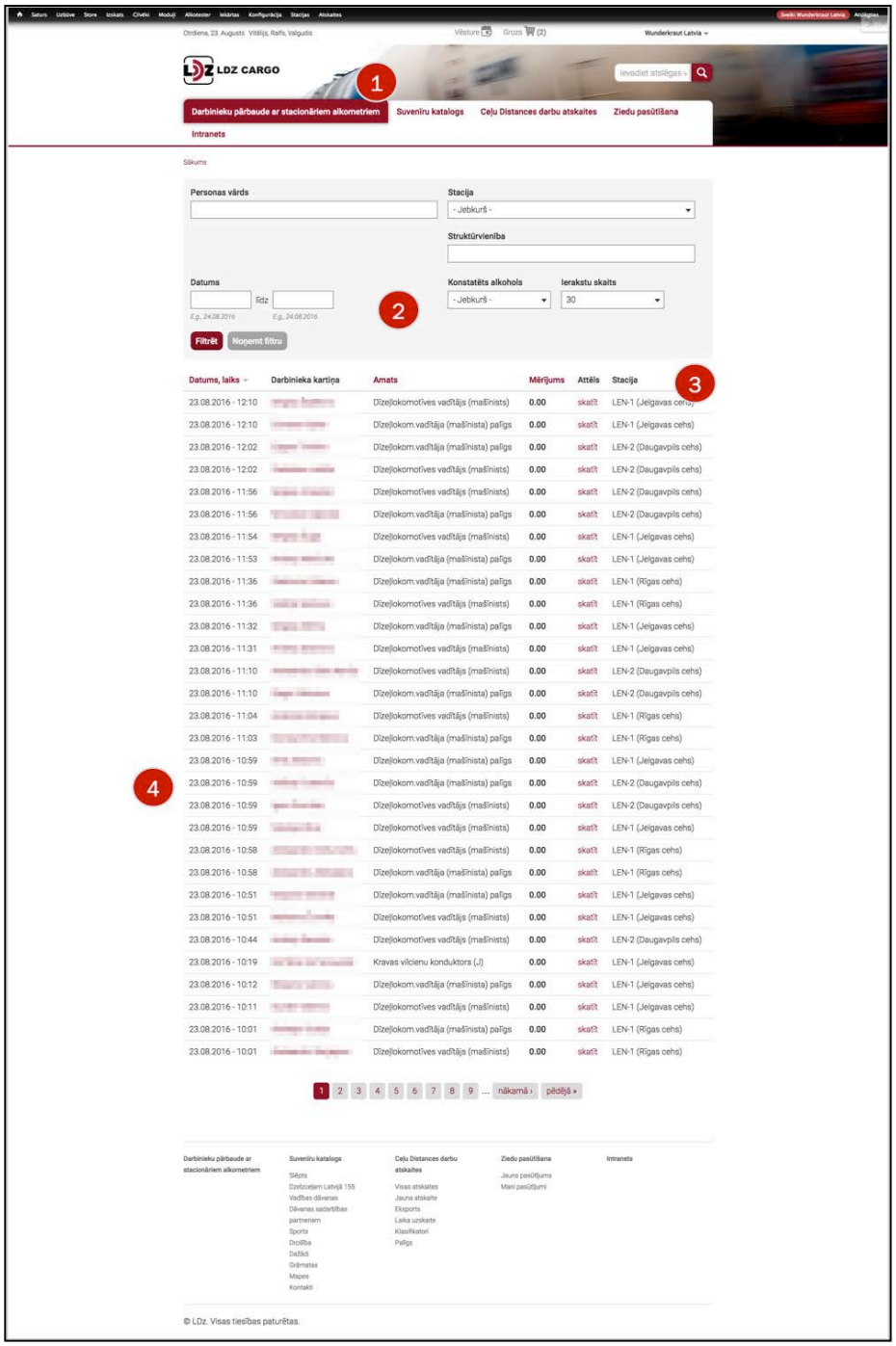


Image 114. Latvian Railway Intranet. This screen shows the results of the alcohol testing that all machinists and their assistants have to do before they can drive. *LDZ_06_alkotester_results_live.png*

Alkotester Result Highlights

1. **Tool integration.** The site integrates work-related tools into the intranet itself. The alkotester page imports results from the alcohol tests that all machinists and assistants must take before driving.
2. **Filters.** The top of page allows people to filter by name, station, department, test result (positive or negative), date range, and how many entries to show on a page.
3. **Sorting.** People can sort results by clicking on any of the red column headings, which include date, office, and measurement amount.
4. **Design.** The site uses a clean design throughout to make tables of information easy to read. Red and gray are used consistently across the site. Tables allow enough space between entries to make them easy to read, with a subtle rule line between each entry.

Road Distance Reports

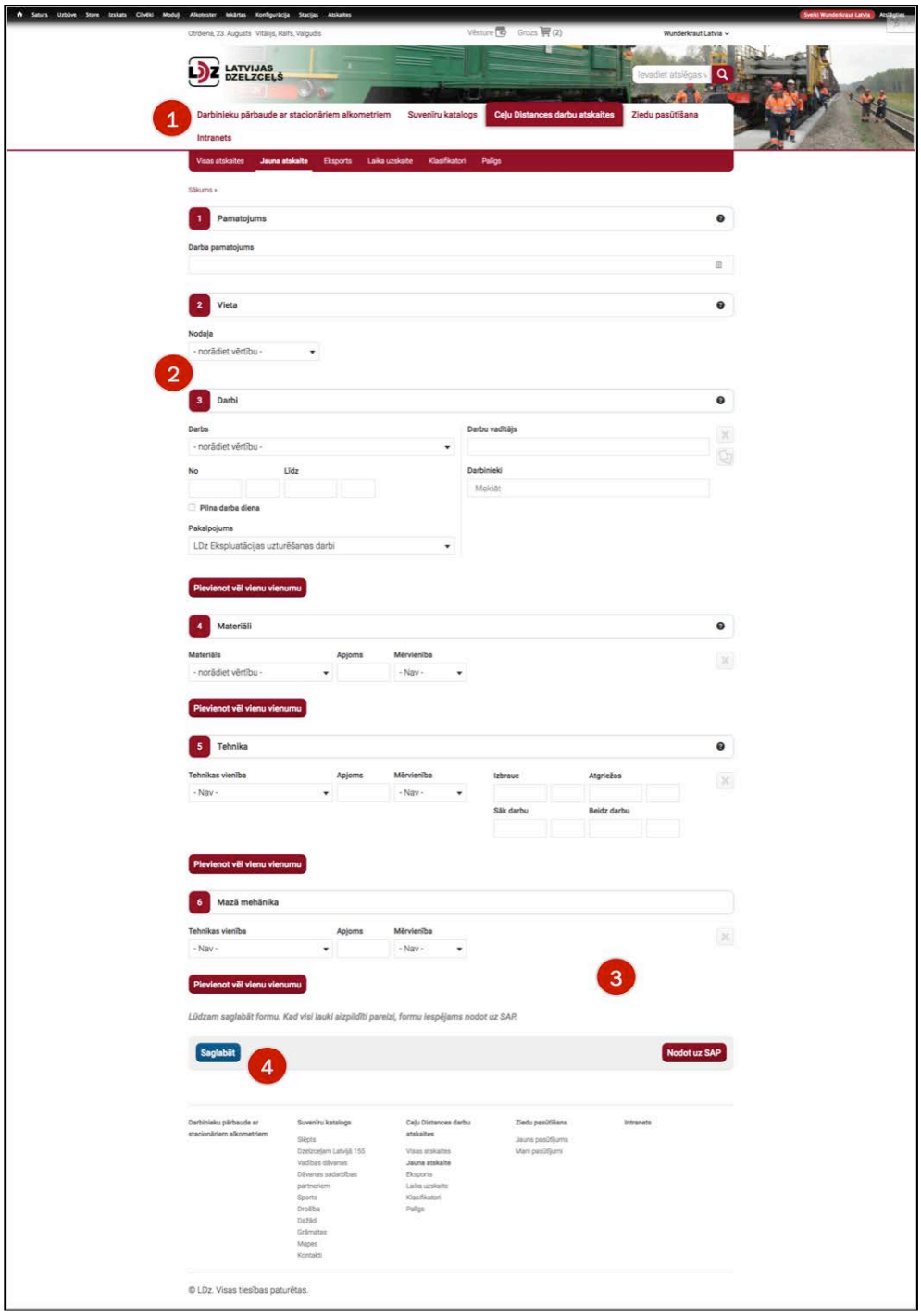


Image 115. Latvian Railway Intranet Road Distance Report.
LDZ_07_road_distance_reports_new_live.png

Road Distance Report Highlights

1. **Road distance report.** The department of Latvijas dzelzceļš does repairs and planned maintenance work on railroads and their surroundings, including stations and other buildings. The work teams use the intranet to report on current projects and tasks via laptops at the railway stations. The system counts the tasks the team does and the time spent doing them. Employees have praised the system for making the process of tracking activities and time simpler.
2. **Fields.** The form allows employees to enter information about where the work was done, which materials and machines were used, and how much time was spent. Fields are numbered and clearly labeled; each is accompanied by a question mark, which leads to additional information about that field and the information it requires. Each step includes a button to add more information if needed.
3. **Invisible timer.** The page includes a timer that is not visible to users; each session recording a project is timed. This information is used to help troubleshoot the system. If someone takes a long time filling out the form, the team contacts that person to see if he or she has questions or needs additional training, or to see if there is a problem with the form itself.
4. **Save or upload.** At the end of the page, users can save a form in progress or upload a completed report to SAP.

DESIGN PROCESS AND USABILITY WORK

The design team from Wunder Latvia worked in sprints to design and refine the new intranet. An iterative approach was helpful because it let team members see how the design looked and worked after each sprint, and make changes as needed.

The key to the team's success in working with the Latvian Railway was communication and collaboration, facilitated by the team's understanding of what the client wanted and needed. The team relied on a few design activities to achieve its goals:

- **A deep dive into existing intranet data.** Team members looked at the existing Latvian Railway intranet in detail, analyzing Google Analytics statistics and content ratings, then evaluating which content was crucial and which could be left behind. Based on this mix of measures, they made decisions about what to prioritize on the new intranet's homepage.
- **Visual workflows.** In the very beginning of the project, the team created visual workflows to illustrate the business logic behind the intranet. These workflows were presented to stakeholders for approval. The drawings helped team members both reach a common understanding of which part of the business was represented in each section of functionality and plan the architecture solution.
- **Business process modeling.** This deliverable outlined a workflow of how the system should work and defined which role does what. It showed business process schemas for the team and stakeholders, as well as defined the system's business needs and further helped the team plan the architecture.
- **Wireframes.** To develop the interaction design approach, the team created wireframes and used InVision App (an online tool) to preview and distribute them to critical stakeholders across the organization. This online collaborative tool was also very helpful in providing an opportunity for stakeholders to comment on and discuss the wireframes in real time.
- **Visual design.** The visual design was derived through a simple, pragmatic process of reviewing other corporate website designs and studying the organization's corporate identity materials.

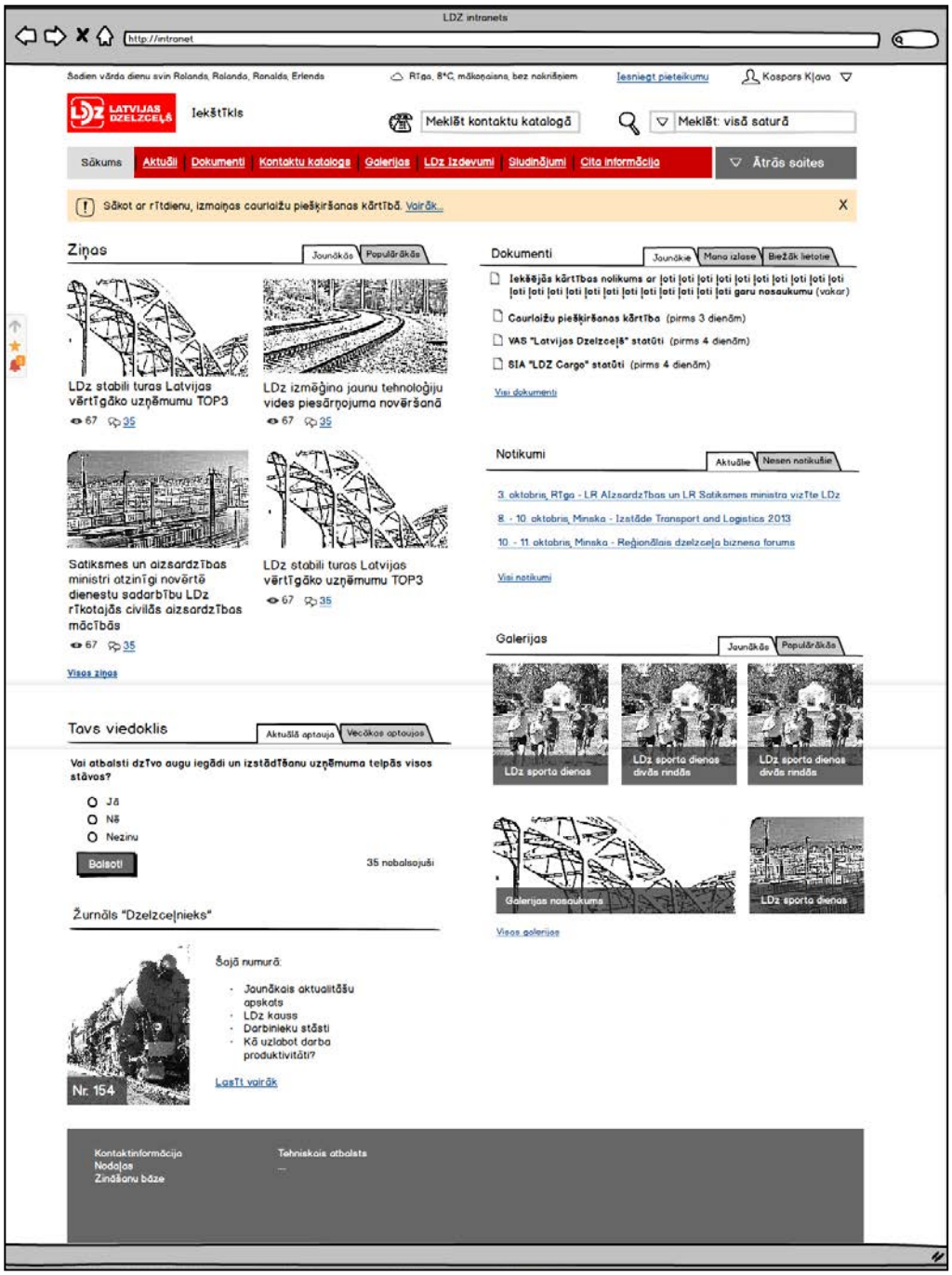


Image 116. Latvian Railway Intranet Wireframe. This wireframe shows a design iteration that evolved over time as the team discussed what was and was not working in prior iterations. *LDz_08_wireframe_front.png*

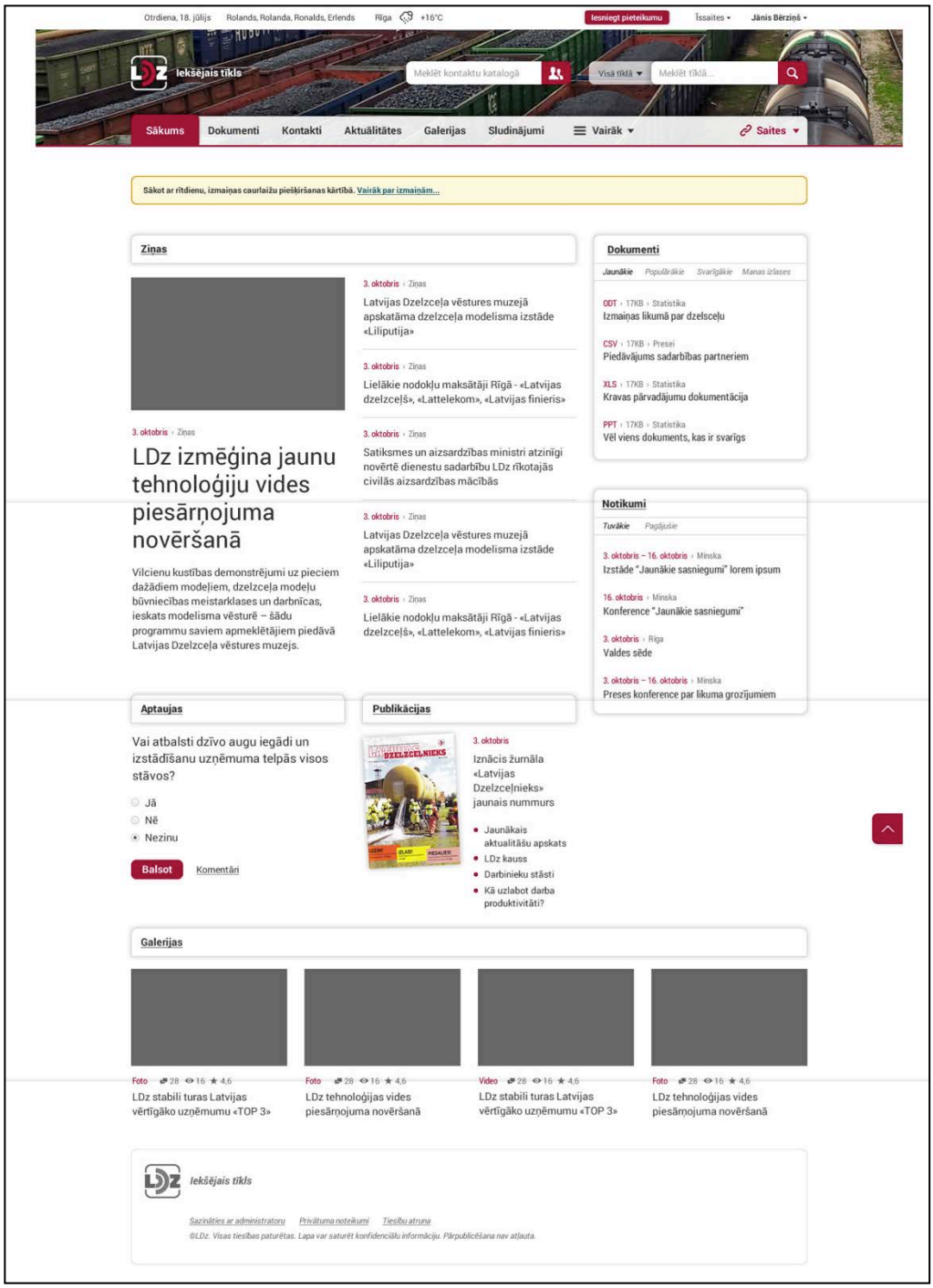


Image 117. Latvian Railway Intranet Design Mock-up. This shows a design mock-up the team created as a next step after the wireframes were approved. *LDz_09_front_graphic.png*

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Wunder Latvia, Ltd	• Designed the layouts (mobile and desktop) • Designed and developed the IA • Developed intranet functionality • Consulted on technical solutions and Agile approach

GOVERNANCE

The owner of intranet is Latvian Railway's Communications department. Wunder Latvia and the internal IT department are jointly responsible for ongoing technical support.

The Communications Department was originally the creator and gatekeeper for all site content, but eventually — due to volume and staffing needs — limited administrator privileges were given to other departments. Now, for example, the Legal Department can publish new versions of documents and the HR department can publish vacancies or other HR-related content. This expansion of content privileges eliminates having the Communications Department be a middleman and bottleneck.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Product Owner	• Attends reviews, retrospective meetings, and planning sessions • Oversees product backlog for all tasks and stories • Maintains a vision of what the company must achieve and what the end product should be
IT Development Manager (Product Owner's "buddy")	The IT Development Manager has many responsibilities, including providing support to the Product Owner. This person should be an employee with previous Agile and Scrum experience — and preferably someone with an understanding of both sides of the project equation: business logic and technical language/solutions. The person provides the following support functions: • Develop intranet and other IT system projects (time, budget, scope) that align with the company's IT strategy • Manage different departments' IT needs inside Latvijas Dzelzceļš • Enter change requests into reporting system • Assist Product Owner with stories (a way of describing tasks), priorities, and so on
Stakeholder Board	• Oversees IT development managers and Product Owners' reports on project progress • Approves changes in budget, scope, and terms • Approves system launch
Legal Experts/Specialists	• Act as a consultant on topics such as data usage, legal documents, and content representation • Provide guidance on which tasks are necessary to support end user and content administration functionality
Security Experts	Provide leadership on: • Creating a secure system architecture and performing system security tests (both

	automated and manual) • Improving the system to increase its security
HR Specialists	• Provide guidance on HR data usage, formatting, end user usability, and permissions to use data
Experts and Developers on Other Systems	• Provide guidance on the other systems' functionality and integration • Perform custom development for integration activities • Lead testing and launch activities for functional components linked to other systems' data usage and integration
Testers	• Conduct end-to-end testing using prepared test scenarios
Server Administrators	• Provide necessary infrastructure to run system smoothly

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	ldzintranet.int.ldz.lv
Default Status	The intranet is the default page in all browsers.
Remote Access	All Ldz employees can access the intranet remotely using bank authorization. When they connect to the intranet through the online bank authorization, employees can see salary and vacation information. Although this is private content, the authorization verifies the user's identity. (In the Latvian Railway network, people must type their password to confirm that they are who they claim to be, rather than, say, some colleague using your system because you forgot to lock the computer screen.) All employees connecting through the online bank see a truncated version of intranet, without sensitive company-wide content (such as sensitive documents
Shared Workstations or Kiosks	Some employees, such as security staff members, have shared accounts. Road distance workers access their reporting functionality on laptops in stations, but they have their own individual accounts.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2009	Launch of intranet 1.0 based on MS SharePoint platform
January–May 2014	Start of intranet 2.0: migration from MS SharePoint to Drupal
May 2014	Launch of intranet 2.0
May 2014–present	Integration with MS SharePoint and other internal systems to expand self-service and automation functionality
September 2015–January 2016	Development of railway construction and repair work report functionality
January 2016	Launch of railway construction and repair work report functionality
January 2016–present	Improvement and maintenance of railway construction and repair work report functionality
October 2015–April 2016	Development of e-banking integration to provide extranet access for using intranet outside the internal network
Overall redesign timeframe: 5 months, with continuous ongoing development	

CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Content Area	**Responsibilities**
Contributors	• Approximately 20 employees are responsible for the intranet content • Four main administrators have access to all intranet functions • The remaining administrators have access to certain parts of the intranet. For example, four primary content administrators maintain the news section, while other administrators supervise and create content in their areas of responsibility.
Contribution	• Communications department employees create intranet content as part of their job function. • Other company employees create content only in particular cases, such as a competition or some other activity that employees take part in (by answering a survey, for example). They can also comment on and discuss news articles and so on. • Employees can submit their own advertisements, but they are published only after administrators' approval.
Training	• **Launch training:** Most of the intensive training was conducted just after the launch, to train editors in how to use the intranet, how to post content, and where to find all necessary functionality. • **How-to articles:** For casual users, there are occasionally news articles published when new functionality is launched. These articles contain a description of where to find the functionality and how to use it.
Management	• Communication department employees are responsible for content and it's accuracy. • The Legal department maintains content in the documents section.

Maintaining Quality	The intranet content is of high quality because it is almost always created specifically for the intranet, and as such it's the sole responsibility of the Communications department employees. Sometimes, the content is republished from ministry news or media agencies, such as when they write articles about Latvijas Dzelceļš. All visitors can provide feedback about article quality by clicking the "Report mistake" button. This sends a message to the editor, who can make any needed corrections.

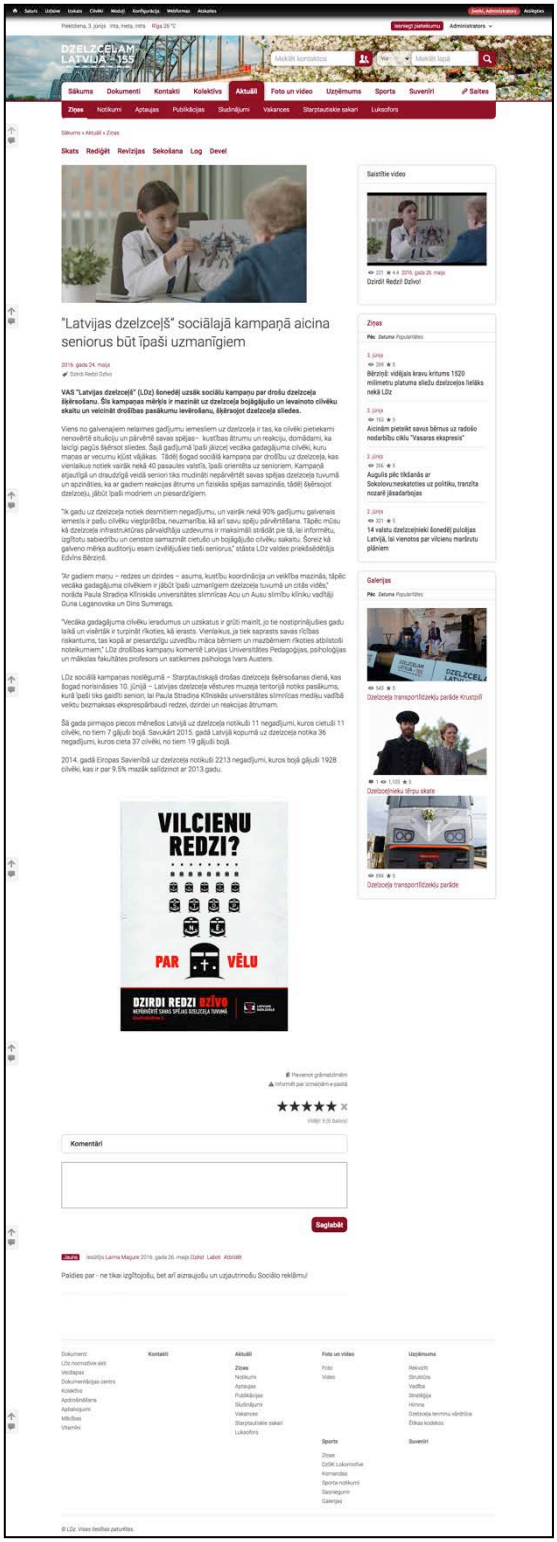


Image 118. Latvian Railway Intranet Article Page. People can comment on all articles. Once a comment is published, other visitors can click on the commenter's name to open his or her contact card. *LDZ_10_content_engagement_live.png*

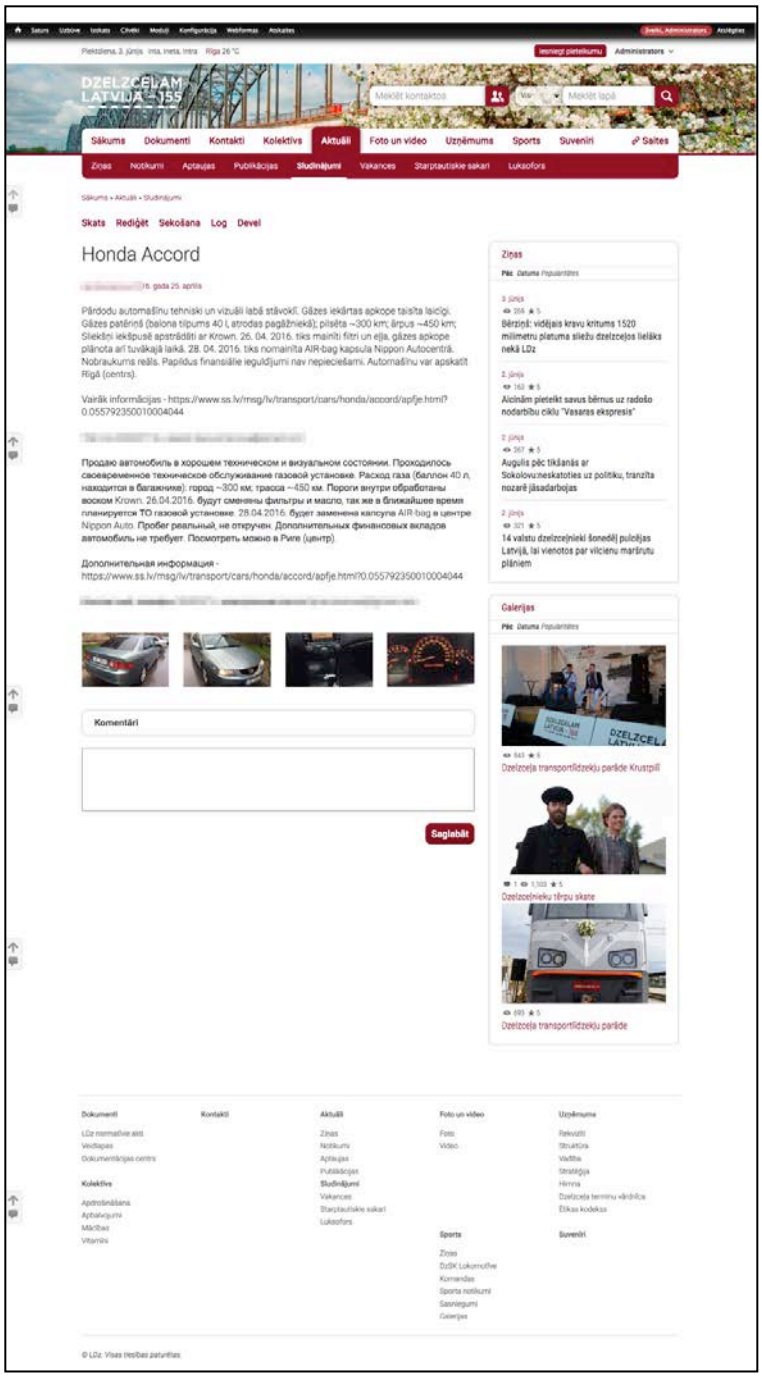


Image 119. Latvian Railway Intranet Goods for Sale Page. Employees can advertise personal goods for sale on the intranet. This shows an ad by an employee who wants to sell a car. An administrator approves all submitted advertising content prior to publishing.
LDZ_11_engagement_advertisement_live.png

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Intel Xeon 2.6 GHz quad core VM, 8Gb RAM, 250Gb HDD for data storage (used primarily for user galleries) • Red Hat Enterprise Linux Server OS • MariaDB DBMS, PHP
Bug Tracking/Quality Assurance	• Freshdesk helpdesk
Design Tools	• InVision, Adobe Illustrator
Site Building Tools	• GitLab, Compass, IDE editors, VirtualBox
Content Management Tools	• WYSIWYG editor
Search	• Solr
Other Functions	• Version control — Git

ROI

After the intranet was launched, success was measured in two ways:

- **Google Analytics data.** Google analytics regularly measures data for the intranet site. Fluctuations in the number of visits are monitored, as are the frequency and regularity of visits.
- **Satisfaction survey.** Every year, employees respond to an internal survey about various information channels, including the intranet. Data from this survey shows that the intranet has developed into a reliable channel of information for employees to learn about internal issues. When comparing data from 2014 and 2015, intranet satisfaction has grown. In 2014, 75% of people said it was useful and comfortable to use; in 2015, that number climbed to 85% as of this writing and is still growing.

Providing Incentives for Use

Prior to the employee portal's development, a survey was conducted to ask employees whether they would use an intranet if it were available from the home network; 71% said they would, so the company green-lit the project.

When the employee portal was initially launched, user activity was quite low. But management decided that the platform was valuable and should be used more often. It thus decided not to give out physical copies of a key company report and make it

available only online. This decision was critical and turned the tide: intranet activity and the number of visits have grown steadily since then.

Evolving through Participation

Another interesting measurement is included in the reporting system for the Road Distances department's railway construction and repair work. When workers begin filling in the report fields, a timer starts; it stops when they finish. The timer is invisible to users, but members of the management team analyze the results. If they find any extremely high numbers, they talk to those people and try to solve whatever problem they might be having with the system. Sometimes, this requires providing extra training about how to fill in the form fields; other times it requires a design tweak to refine the form.

The organization has taken the same approach with the intranet as a whole: It wants people to affect further development of the tool. For example, if someone has some new functionality in mind, content editors can conduct a survey about it, and people can weigh in on whether they think the new functionality is needed or not.



Image 120. Latvian Railway Intranet Road Distance Reports. This is a list of all the Road Distance reports on the intranet. It shows how much time it took each author to fill out the report. Someone visiting this page can sort the list in ascending or descending order to help identify where people might be experiencing challenges with the forms so the problems can be remedied to improve productivity. *LDz_12_Road_distance_reports_time_spent_live.png*

LESSONS LEARNED

IT development manager Jurģis Gaigals shares some lessons the team learned during the redesign project:

- **Everything must be simple and easy to use.** "When talking about the product, a good practice is that everything we create has to be simple and easy to use. Maybe some of the functionalities are missing or aren't thought out in the deepest details, but the solution is well structured and understandable. There is a stereotype that all IT systems are something dreadful, time consuming, and complicated. Thanks to thoughtful deployment of information, this stereotype is broken."
- **Technology must work well, but it also must be visually pleasing.** "Modern tools have been used in intranet development process so the result is progressive, easy to use, and pleasant to view. IT systems have to be pleasant to look at, so that the everyday user in his routine work can have something visually attractive to look at and to return to."
- **Have a clearly defined product owner.** "I think that one of the good practices was a clearly defined product owner. It was clear to everyone which team member had all the knowledge about the product. It was wise to involve other users who were able to give valuable feedback on users' experience, but it was important to know who was the master of the technology."
- **Use a variety of communication tools to support remote workers.** "If working long distance, we recommend using a variety of online solutions like Google Hangouts, Pivotal Tracker, InVision , and others. A good communication practice was to hear and track all the opinions within the intranet team. Of course, some things will stay 'off board' but it is important to give the floor to everyone involved."
- **Know who the experts are.** "When starting to develop a complicated functionality where an integration of another system is needed, make sure that an expert on a particular system is available for consultation. A consultation or a real-time example will save a lot of time and energy."

Santander Group

OVERVIEW

COMPANY

Banco Santander's commercial model aims to satisfy the needs of all types of customers, including individuals with different income levels, companies of any size and various activity sectors, private companies, and public institutions.

Headquarters: Madrid, Spain

Company locations: The Santander Group has a balanced geographic distribution and high market shares in each of its 10 key markets: Spain, Germany, Poland, Portugal, the UK, Brazil, Mexico, Chile, Argentina, and the US.

Locations where people use the intranet: Currently, all users have access to the same group of portals, according to their roles in different countries. In this phase of the new intranet's release, the company accomplished a redesign that serves its first user group at the company's headquarters in Madrid, Spain.

Annual revenue: In 2015, Santander achieved profit of €5,966 million, with a market capitalization of €65.792 million (euros)

THE INTRANET

Users: The Santander intranet is divided by countries. Each country has an intranet based on the Santander intranet model. There are currently 200,000 people using this intranet architecture. The first users of the new intranet are located at the company's headquarters. These people need to access a lot of information, including processes, applications, and the ability to communicate with colleagues from other countries. They also need to share information and documents with other business areas, and they need a modern, innovative, and dynamic intranet that opens up possibilities for other types of communication in future releases.

Mobile approach: Responsive web design

Technology platform: Liferay v6.2, SharePoint 2013, and HTML/CSS/JavaScript

TEAM

Design team: The intranet team is large and spans many roles and tasks. Its members include many other colleagues not listed here.

Leadership: Ana Olabarria, Channels Director; Antonio Alberto Lopez, Portals Manager; Bosco de Dompablo, Portal Project Manager; Lola Ruiz, Security Team Leader; Javier Lopez, Collaboration Manager; Ernesto Rubio, Collaboration Team Leader

Design: David Gil, Usability Manager; Patricio Becher, UX Project Manager; Sergio Cabrera, Creative Director

Development: Santiago Muñoz, Portals Centro Excelencia Director; Miguel Ángel Sanz, Portals Manager; Jose Manuel Organero, Team Leader; Ruben Laso, Developer; Juan Saiz, Design Leader; Eva Pardo, Analyst; Alejandro Barco, Team Leader

Architecture: Angel Redondo, Security Director; Eduardo Calderon, Security Architecture Manager; Jaime Perez, Security Architect; David Fariñas, Software Architect; Julian Nieto, Software Architect; Piedad Garcia, Functional Architecture Manager; Jorge Llano, Functional Architect; Jesus Flores, Technical Architecture; Oscar Zapater, Technical Architecture

Deployment: Santos Montoro, Corporate Area Director; Antonio Martinez, Portals Manager; Eduardo Martin, Collaboration Manager; Luis Ángel Pérez, Portal Leader; Tomas Iglesias, Security Leader; Felipe Rivilla, Content Catalogue Leader; Oscar Sanchez, Service Manager; David Resco, Portal Leader; Jorge Pantoja, Portals

Operations: Nuria Paton, Multichannel Director; Ricardo Barrientos, Multichannel Leader; Ruben Plaza, Contribution Team Leader; María José Luceño, Content Contribution; Marta Gonzalez Leon, Content Contribution

Communication: Alberto Baltanas, Internal Communication Director; Elena Mercader, Internal Communication; Jose Manuel Valverde, Internal Communication; Virginia Garcia, Internal Technical Communication

Technology & Operations: Patricio Barrena, Portals Manager; Daniel Ardines, Portal Project Manager; Daniel Magdalena, Community Manager; Maria José Álvarez, Portal Project Manager; Isabel Jimeno, CIO

INTRANET TEAM



Team members shown here (left to right): Alberto Baltanás, Felipe Rivilla, Eduardo Martín, Oscar Sánchez, Jorge Pantoja, Luis Ángel Pérez, David Resco, Eva Pardo, Antonio Martínez, Rubén Laso, Maipi García, Lola Ruiz, Jorge Llano, Miguel Ángel Sanz, Julián Nieto, Santiago Muñoz, David Fariñas, Ana Olabarría, Ernesto Rubio, Virginia García, Jaime Perez, Patricio Barrena, Bosco de Dompablo, Ángel Redondo, Antonio López, Eduardo Calderón, Alejandro Barco, Daniel Ardines, Elena Mercader, José Manuel Organero, David Luis Gil-Esteban, Juan Saiz, and Sergio Cabrera.

HIGHLIGHTS ABOUT THIS WINNER

A company-wide digital transformation process combined with employee requests for a modern, innovative intranet gave the Santander intranet team a perfect opportunity to greatly improve on an already helpful intranet. With previously evolved communication, collaboration, and personalized tools, the team analyzed employees' habits to further strengthen these areas and, indeed, it worked. The team created an up-to-date, on-brand look that's engaging, and innovatively designed menus slide from nowhere and seem to generate additional screen real estate.

The intranet also seeks to unify 200,000 employees from multiple companies, job roles, and countries. To help meet this goal, the new design fosters use of social media and other communication approaches. Plus, the new design encompasses a scalable design model that can extend to the other companies of the Santander Group. This is a big step in the right direction for establishing a common framework for all employees.

- **Versatile page layouts.** The flexible templates let contributors present content to employees in the best possible layout, rather than having to stick to limited page templates.
- **Secure.** To say that security for a financial intranet is vital is an understatement. With this in mind, the team started its design by outlining a high-security model. Also, team members worked through the many challenges that come with implementing single sign-on, which helps eliminate the security breach of writing down passwords, which users often do when asked to remember multiple passwords.
- **Productivity applications for work.** The intranet includes more than 100 banking applications, which people can easily find and add to their bookmarks. Depending on the need and application, users can open any one of these applications may be opened as either an integrated intranet element or in a new window.
- **Menu panels.** Social channels and the user's portals are personalized by role and are available in expandable panels, which can be opened via icons. These panels are available in one click on every page of the site, but are tucked away by default to economize on valuable screen real estate.
- **Personalized.** The user's role dictates everything from their menus to their search results. This is especially helpful when dealing with such a large amount of content created for employees in such a wide variety of offices, countries, and jobs.
- **Multi-language.** The intranet is available in Spanish and multiple other languages depending on the country in which the employee is based.
- **Microsite for corporate culture.** A corporate culture campaign is thoroughly described and supported on a microsite, helping to instill the same corporate values and norms in all 200,000 employees.

BACKGROUND

The need to define a new intranet model arose as part of the digital transformation process the Santander Group is currently undergoing, as well as from the employees' request for a modern, dynamic, and innovative intranet. This employee demand was revealed in an ideas competition that Santander Bank conducted with its employees. The need for a better intranet rose to the top of the list of ideas requested as part of this competition. Previous to this redesign effort, the Santander Group intranet had evolved organically over time.

Goals

The organization outlined four goals for this major redesign project:

- **Focus on people.** Offer an attractive, logical, and efficient UX with an innovative approach that focuses more on people than processes, and develop an attractive design suited to the company's increasingly technology-minded users.
- **Improve efficiency.** Improve the efficiency of business processes by analyzing user habits, and customize the experience based on roles, enabling people to do their work quickly and safely.
- **Facilitate connections.** Foster social media within the organization by bringing together people from different companies and countries across the Group to expedite employees' day-to-day tasks.
- **Plan for the future.** Create a scalable model, which is easy to implement and adopt, in order to extend its implementation to the Group's other companies, with the ultimate goal of establishing a common model for all employees.

Challenges

To meet these project goals, team members knew they would encounter many challenges, including the need to provide

- A bidirectional communication channel for employees, so that the Bank and its employees can maintain active dialogue
- Access to tools with minimal clicks, to avoid unnecessary actions that may distract user attention
- Quick and easy access to the information employees need to carry out their work (both local and corporate)
- Access to the business processes required to perform work tasks and provide customer service
- Access to individual/personal employee information and HR processes that are specific to each employee, while maintaining the privacy of more sensitive content
- Access to training platforms
- Access to the Group's services for employees, such as hairdressers, medical centers, supermarket purchases, and childcare

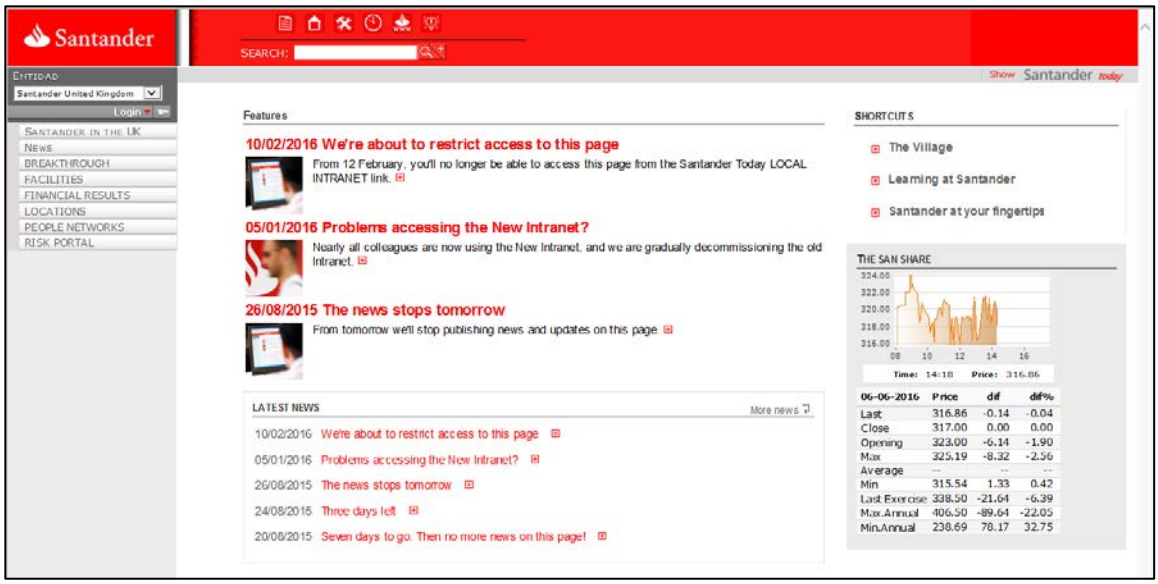


Image 121. Santander Group Intranet Old Homepage. The old homepage design had many shortcomings. For example, portals worked only with a few page templates, so portal managers had very little design flexibility. In each template, portal managers were unable to place components where desired. In addition, portal access (through the carousel on the top right) wasn't usable, so the task of reaching hidden portals was slow and not intuitive. *Santander_01_Screenshots-of-the-site-before-you-made-changes_1_Version.png*

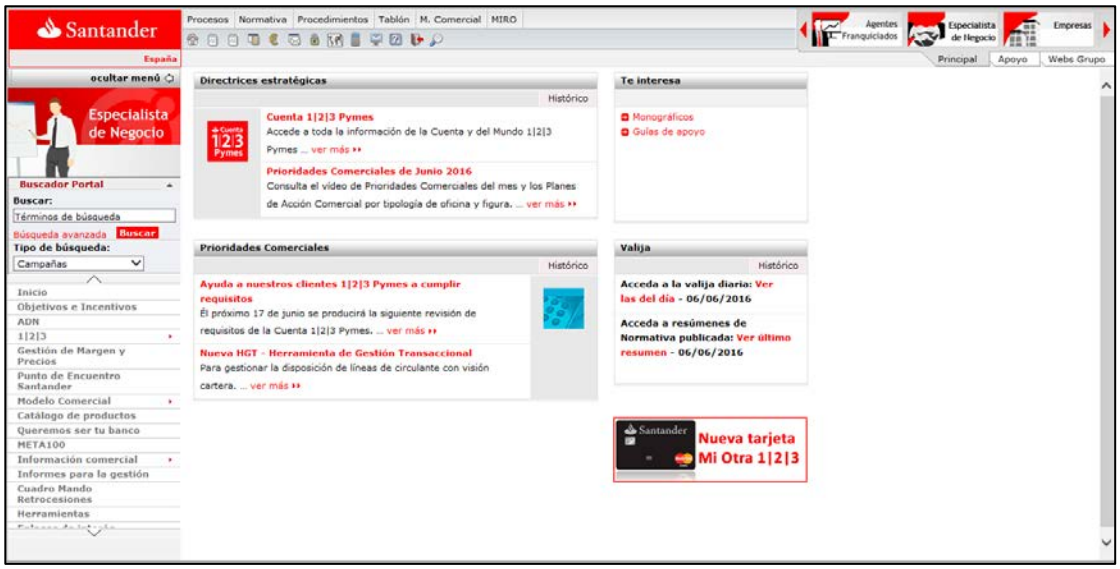


Image 122. Santander Group Intranet Old Homepage. Another view of the intranet prior to the recent redesign. *Santander_02_Screenshots-of-the-site-before-you-made-changes_2_Version.png*

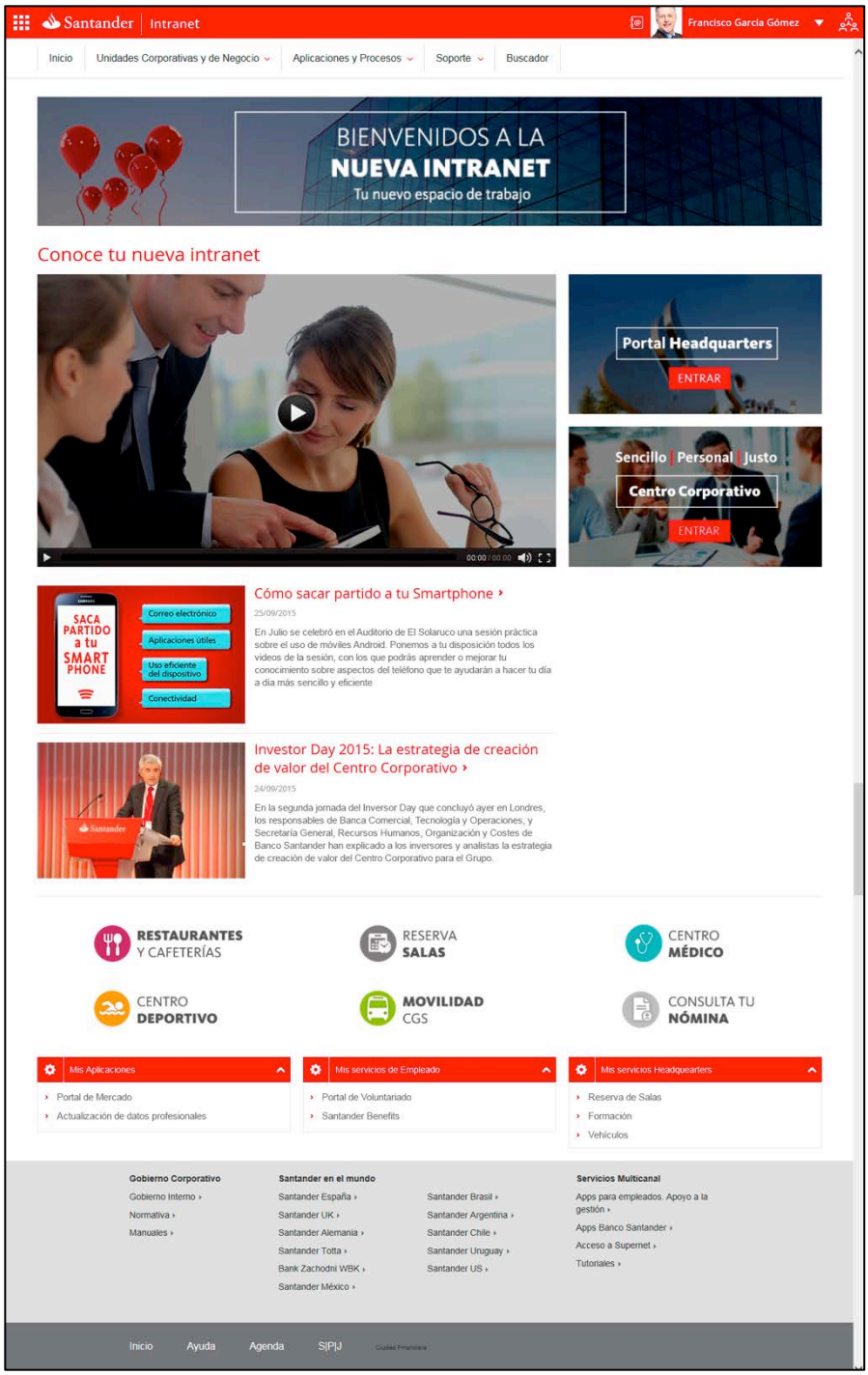


Image 123. Santander Group Intranet Homepage. An older version of the newly redesigned Santander intranet homepage with a large, attractive video story in the upper left. *Santander_03_Homepage_Live.png*

DESIGN REVIEW

Homepage



Image 124. Santander Group Intranet New Homepage. This shows the new intranet homepage with a new three-column layout and no large hero or carousel. The new homepage utilizes dynamic backend pages. *Santander_04-Current-Home_Live.png*

Homepage Highlights

1. **Welcome banner.** The welcome banner at the top of the homepage lets employees know the intranet has a new design. It communicates that employees can access work tools and get updates on the latest company happenings. This banner has been updated a few times since the intranet launched.
2. **News.** The Marketing & Communication department writes the news articles and chooses which ones will appear on the homepage. The news items are about everything from local items, such as *Recuerda que durante tus vacaciones puedes ceder tu plaza de parking* (Remember you can share your parking space while you are on vacation), to general items for everyone at the organization, such as *¿Te vas de vacaciones? Sigue estos consejos* (Are you going on vacation? Follow this advice) and *Vuelve la colección Banco Santander* (The Santander Bank art collection is back).
3. **Common links.** Based on user research, the team determined which links employees use most often; it then added these links to the bottom of the homepage so users don't have to hunt. Memorable, easy-to-recognize icons and brief labels indicate links to the following sections: *Restaurantes y Cafeterías* (Restaurants and Cafes), *Reserva de Salas* (Meeting room reservation services), *Centro Médico* (Medical Center), *Centro Deportivo* (Sports Center), *Cesión de Plaza* (Parking space sharing), and *Movilidad y Parking* (Mobility and Parking).
4. **Social icon.** Visitors can quickly access the "social canvas," which includes social channels, by clicking the three-people icon in the upper right corner. The content on the homepage and other pages is prioritized by default, but social elements are a click away on any intranet page. Users can also click the icon to close the social canvas.
5. **Portals icon.** In the upper left corner, a small nine-squared icon appears that opens a menu of various portals available to the logged-in user.
6. **Footer.** Items in the footer help employees access handy links related to the public-facing websites, corporate governance, the help center, press releases, Santander brand templates, and other resources. The three headings in the footer arrange the links by three topics: Corporate Governance, International Santander Bank internet sites, and Multichannel Services.

Social Canvas, Activity Stream



Image 125. Santander Group Intranet Social Canvas. The social canvas can be opened at any time to expose social channels accessible to the logged-in user. *Santander_05_Activity-stream_Live.png*

Social Canvas, Activity Stream Highlights

The intranet offers a panel with links to the organization's social channels. The social canvas opens and closes by clicking the three-people icon in the top right of all pages. The icon and panel is a helpful, creative solution to making all social channels available from all intranet pages. Three vertical icons within the panel lead to the most common social channels:

1. **Activity**: A social network wall (similar to Facebook).
2. **My contacts:** The logged-in user's contact list.
3. **Social links:** Wikis, communities, Yammer, and so on.

Social Canvas, Connections



Image 126. Santander Group Intranet Social Contacts. A list of the user's social contacts; each contact can be quickly called, video called, chatted with, or emailed. *Santander_06_Connection_Live.png*

Social Canvas, Connections Highlights

1. **Social connections.** Names and photos of social connections are listed in alphabetical order. Hovering over a contact displays several options for communicating with that person, making it very easy for employees to contact each other and collaborate.
2. **Search.** An open search field expedites finding a connection.

Communications, Options

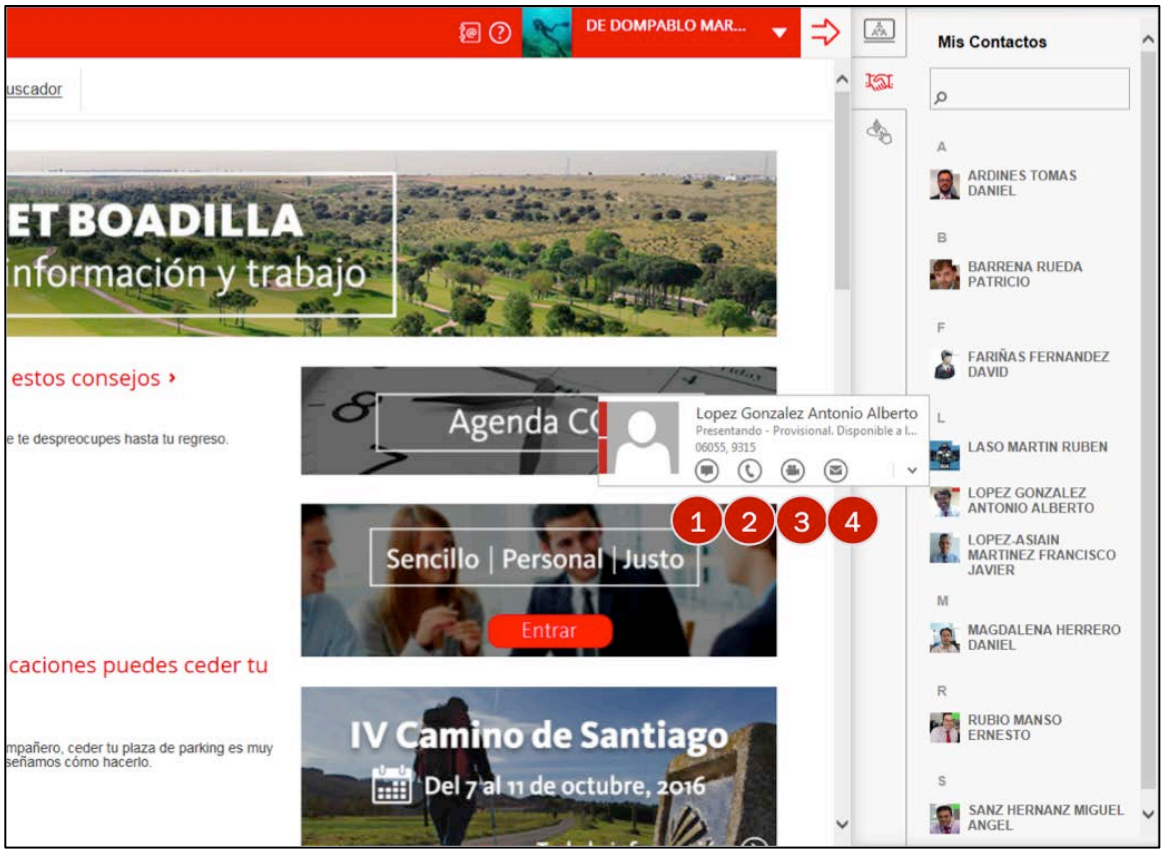


Image 127. Santander Intranet Social Canvas. The social canvas may be opened at any time to expose the social channels to which the logged-in user has access. *Santander_07-Communication-options_Live.png*

Communications, Options Highlights

The intranet makes it easy for employees to communicate with each other online, in any way that suits them. Hovering over a connection lets users click to do any one of the following:

1. Chat
2. Call
3. Videoconference
4. Email

Communications, Chat

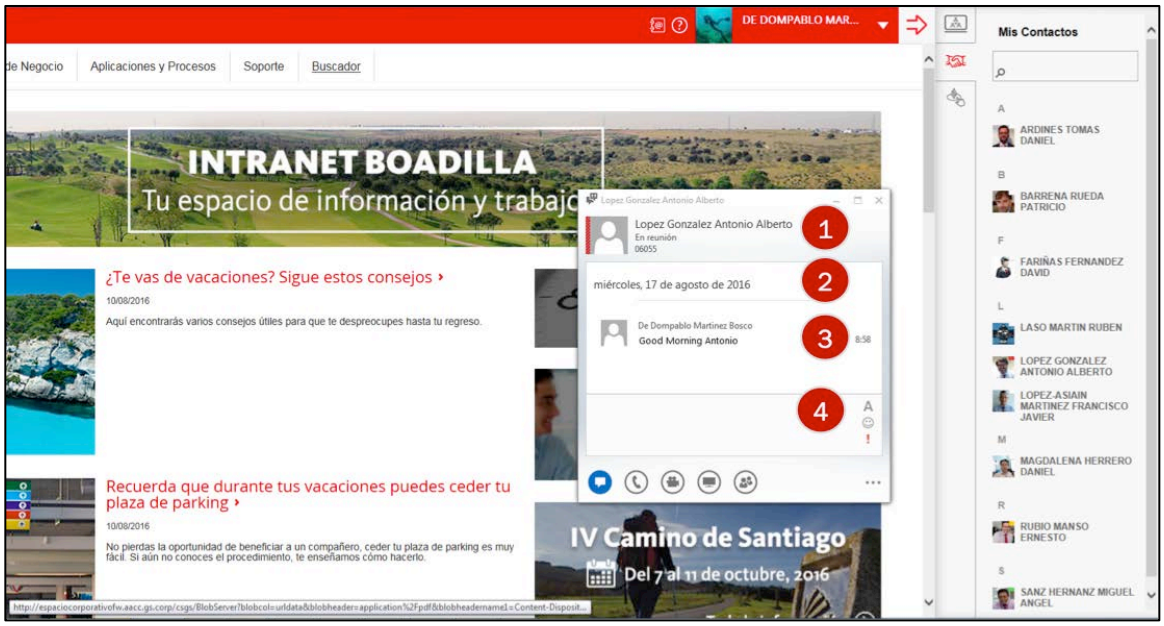


Image 128. Santander Group Intranet Chat Window. The chat window displays the people on the chat and the date and time. *Santander_08-Communication-chat_Live.png*

Communications, Chat Highlights

1. **Parties:** The names of the people chatting are listed at the top.
2. **Day and date:** The day of the week and date of the chat appears near the top.
3. **Time:** The time of the chat is also visible.
4. **Field:** An open field accommodates a few lines of text and icons.

Communications, Call

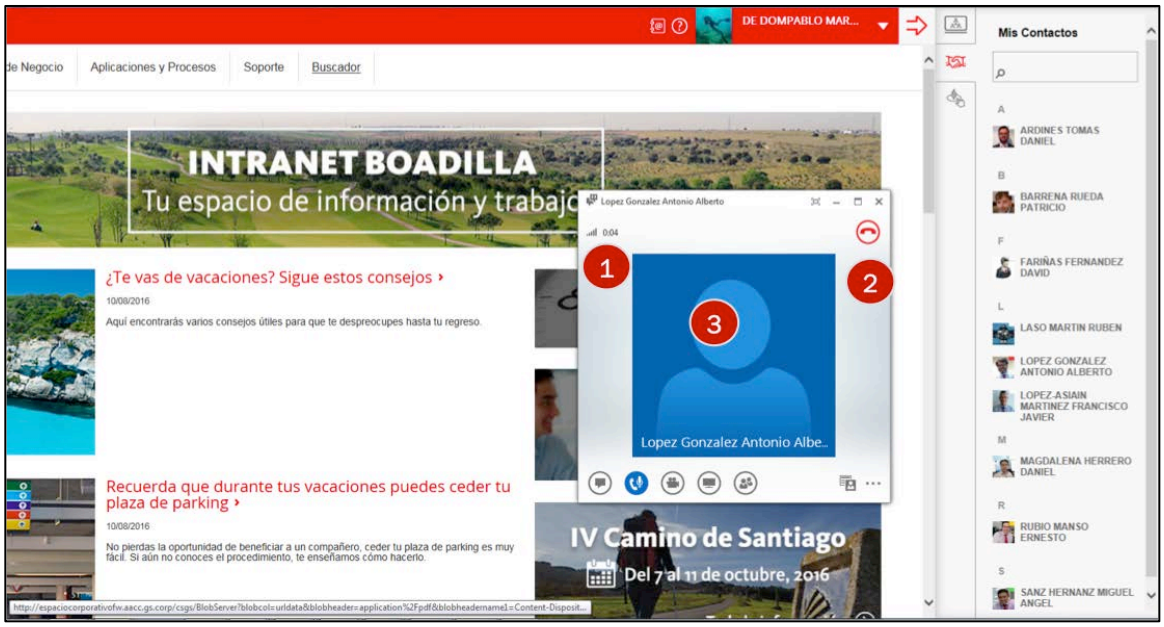


Image 129. Santander Group Intranet Call Window. The call window displays the people on the call, the hang up button, and the date and time. *Santander_09-Communication-call_Live.png*

Communications, Call Highlights

1. **Sound meter:** This shows people that sound is working.
2. **Hang up:** Clicking the red phone icon will end the call.
3. **Icon:** A voice call with no video shows an icon in the center.

Communications, Videoconference

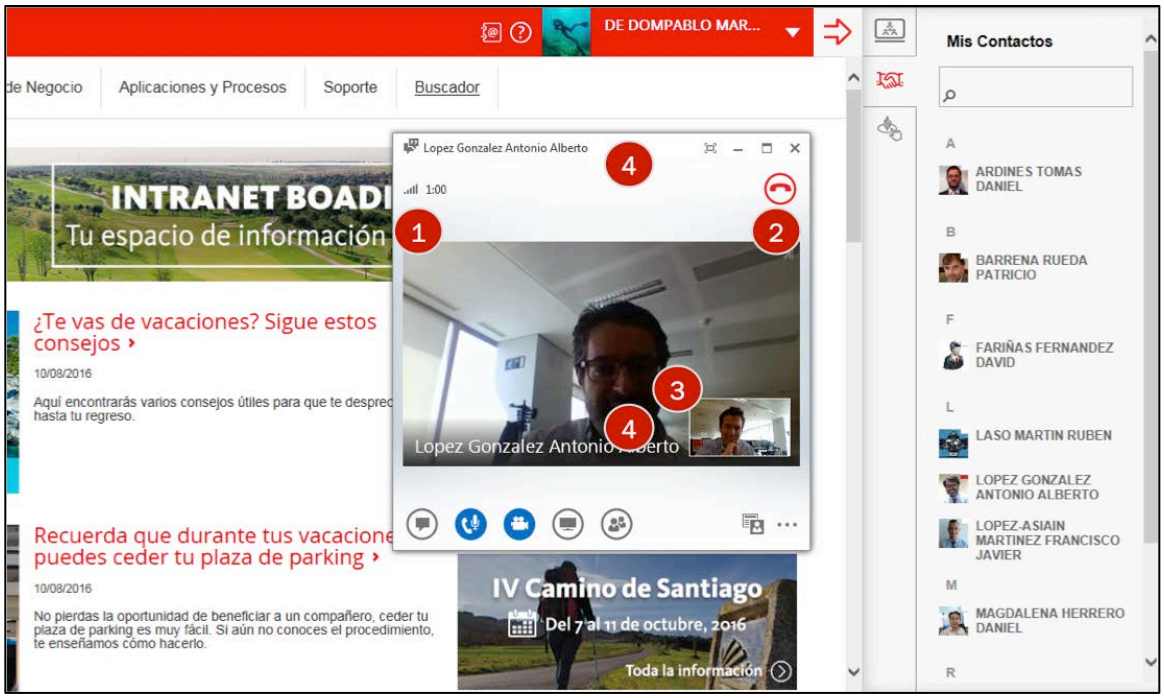


Image 130. Santander Group Intranet Video Call Window. The video call window displays the people on the call, their video, the hang up button, and the date and time. *Santander_10-Communication-Videoconference_Live.png*

Communications, Videoconference Highlights

1. **Sound meter:** This shows people that sound is working.
2. **Hang up:** Clicking the red phone icon will end the call.
3. **Video and inset:** The video of people on the call shows in the center.
4. **Names:** The names of people on the call display on the screen and as the window title.

Communications, Email

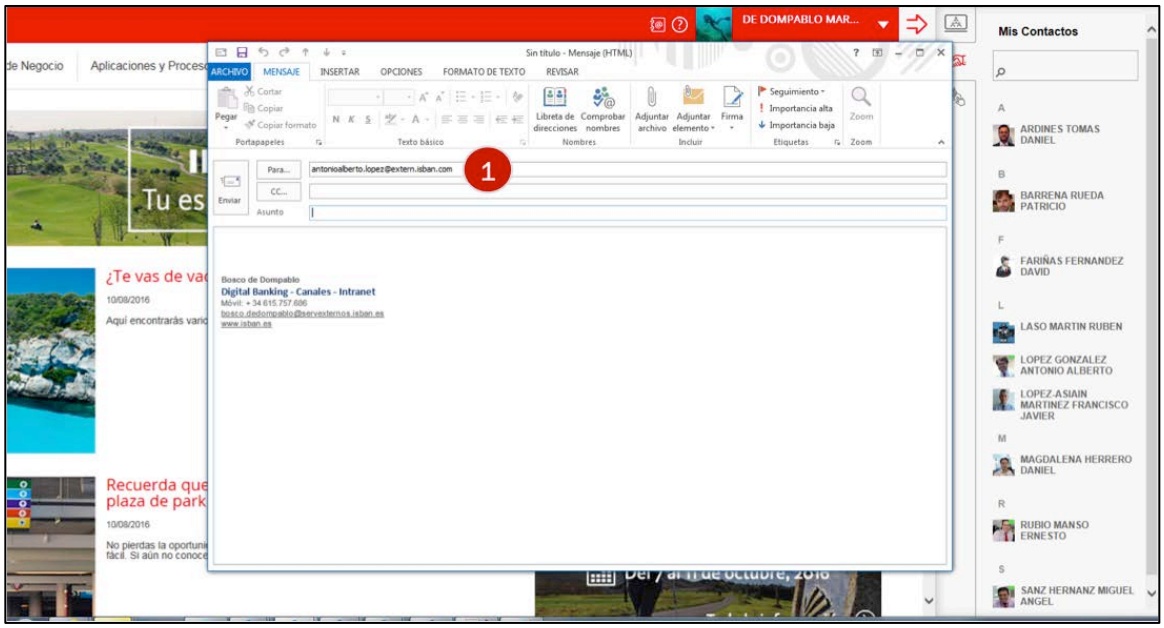


Image 131. Santander Group Intranet Email Message Window. The *to* field is automatically populated when a user clicks on the email icon and launches a message window. *Santander_11-Communication-Email_Live.png*

Communications, Email Highlights

1. **Automatic:** Clicking the email icon launches email; the message is automatically addressed to the contact person.

Personalization

These screens show the different portals and social channels accessible to two different roles. The logged-in user's face displays in the upper right in each.

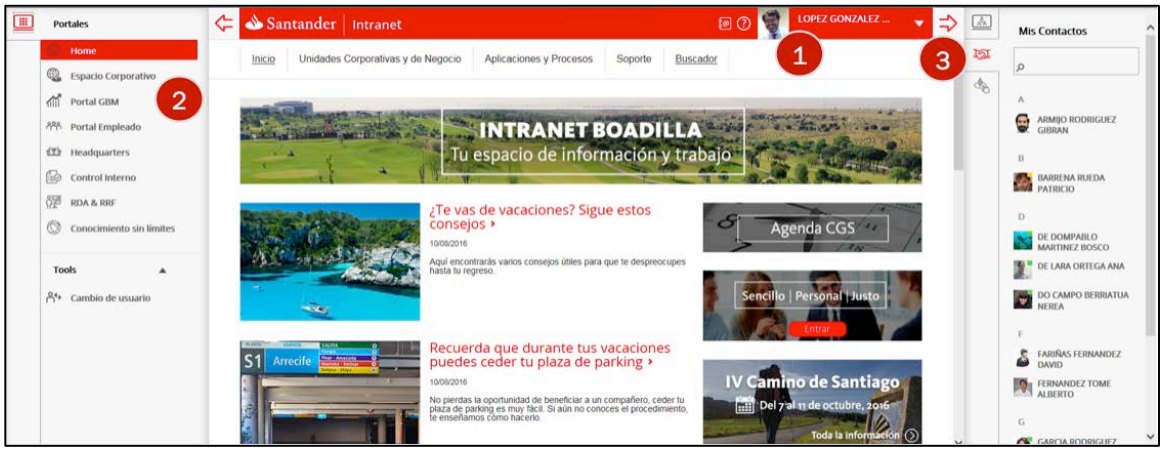


Image 132. Santander Group Intranet Role-Based Personalization. In this view, the user has access to portals and social tabs for **Role1**. *Santander_12-Role-1_Live.png*

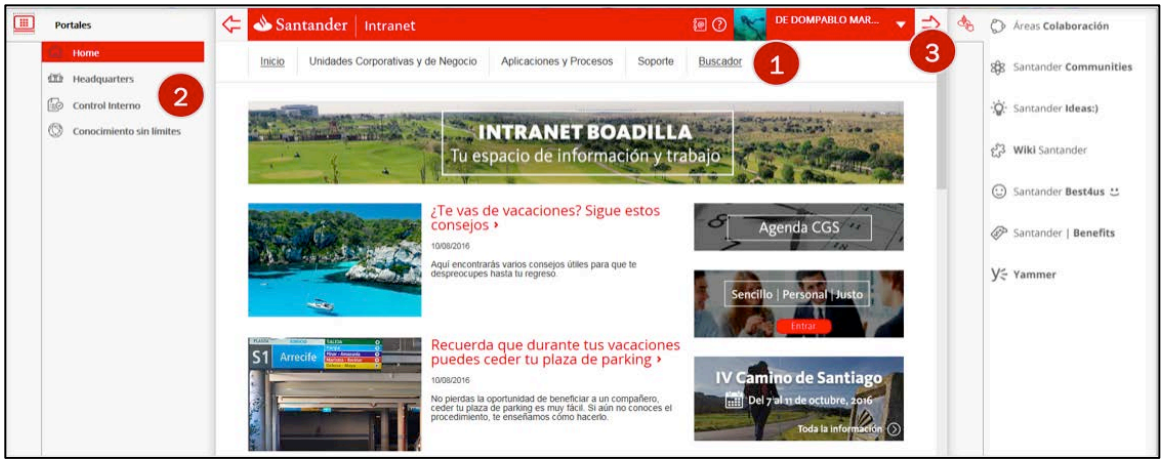


Image 133. Santander Group Intranet Role-Based Personalization. In this view, the user has access to portals and social tabs for **Role2**. *Santander_13-Role-2_Live.png*



Image 134. Santander Group Intranet — Logging Out. The user's picture and menu to the right gives him access to his profile and a link to log out. *Santander_14_Employee-profile-page_Live.png*

Personalization Highlights

Roles are based on various user attributes; the most common ones are related to job and location. The team ensures that careful consideration is given to roles so employees can access the information and applications they need, because security is of highest importance at this and any financial institution. The Corporate Organization Team determines each employee's role, which dictates access to the user's default portal, tools, menus, and information.

1. **Image and login.** An image of the logged-in employee appears at the top of pages, along with a drop-down icon with links to his or her profile and logout.
2. **Varied access to portals.** Role1 (top screen) has access to eight portals (on the left), while Role2 (bottom screen) has access to only four portals.
3. **Varied access to social channels.** Role1 (top screen) has full access to the three social tabs (on the right), while Role2 has access to only one social tab.
4. **Access to profile and logout.** The user's picture and menu to the right gives users access to their profile and a link to log out. Logging out of the intranet is a security feature that is sometimes as important as logging in.

Employee Profile

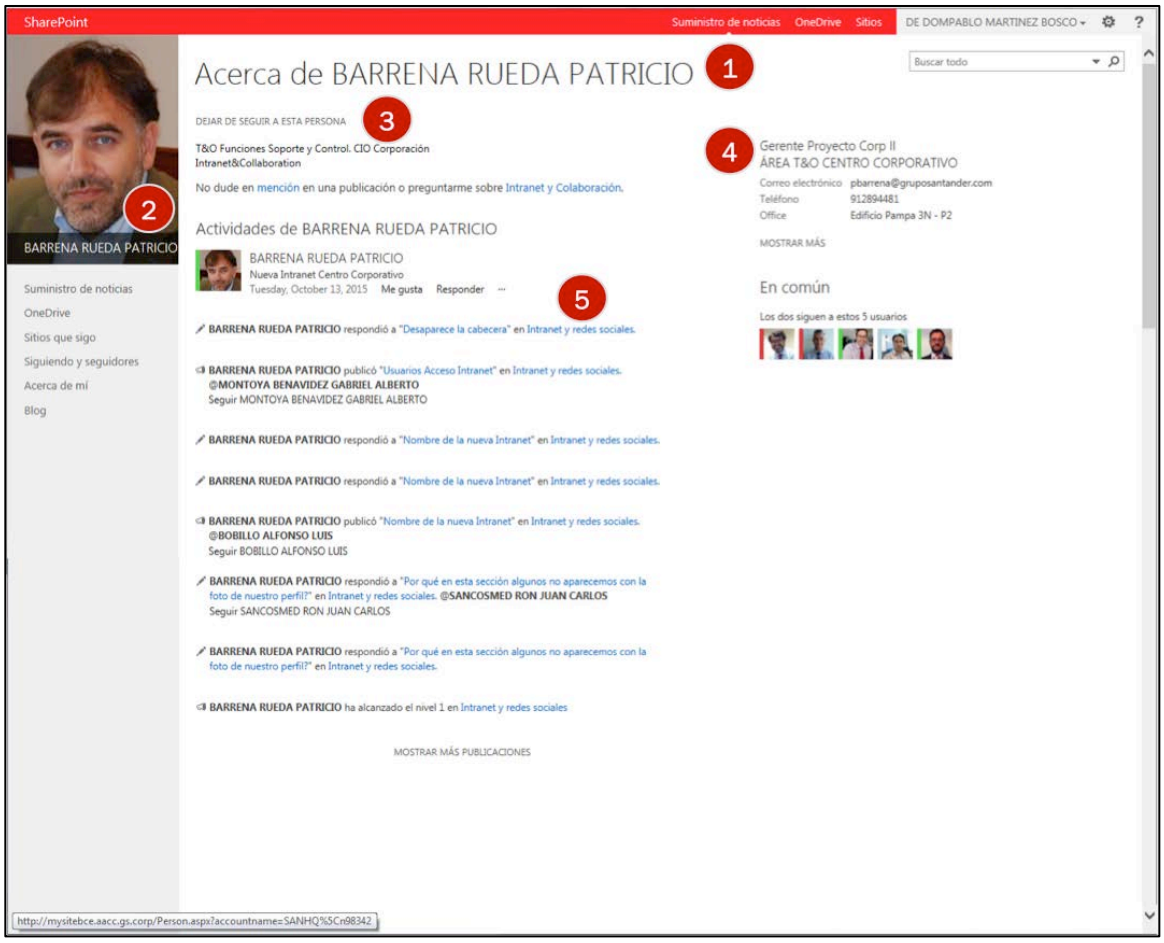


Image 135. Santander Group Intranet Employee Profile Page. The employee profile page includes a photo, job, contact information, and activity stream. *Santander_15_Employee-profile-page-detail_Live.png*

Employee Profile Highlights

1. **Name:** Appears in large letters at the top.
2. **Photo and name**: A clear photo can help employees identify each other, realize which colleagues they haven't yet met, and see what people look like.
3. **Job and area:** Appears below the name.
4. **Contact information:** Phone, email, and office location is visible in the upper right.
5. **Social activity:** Posts and responses make it easy to see what the person is interested in.

Megamenu



Image 136. Santander Group Intranet Megamenu. A simple, uncluttered megamenu. *Santander_16_Top-level-navigation_Live.png*

Megamenu Highlights

1. **Uncluttered menu:** Top-level commands include those for home, corporate and business units, applications and processes, support, and search.
2. **Megamenu background:** The gray background juxtaposed against the page makes the menu easy to see.
3. **Text:** Dark text color provides good contrast against the light gray, making it easy to read.

General Support Services

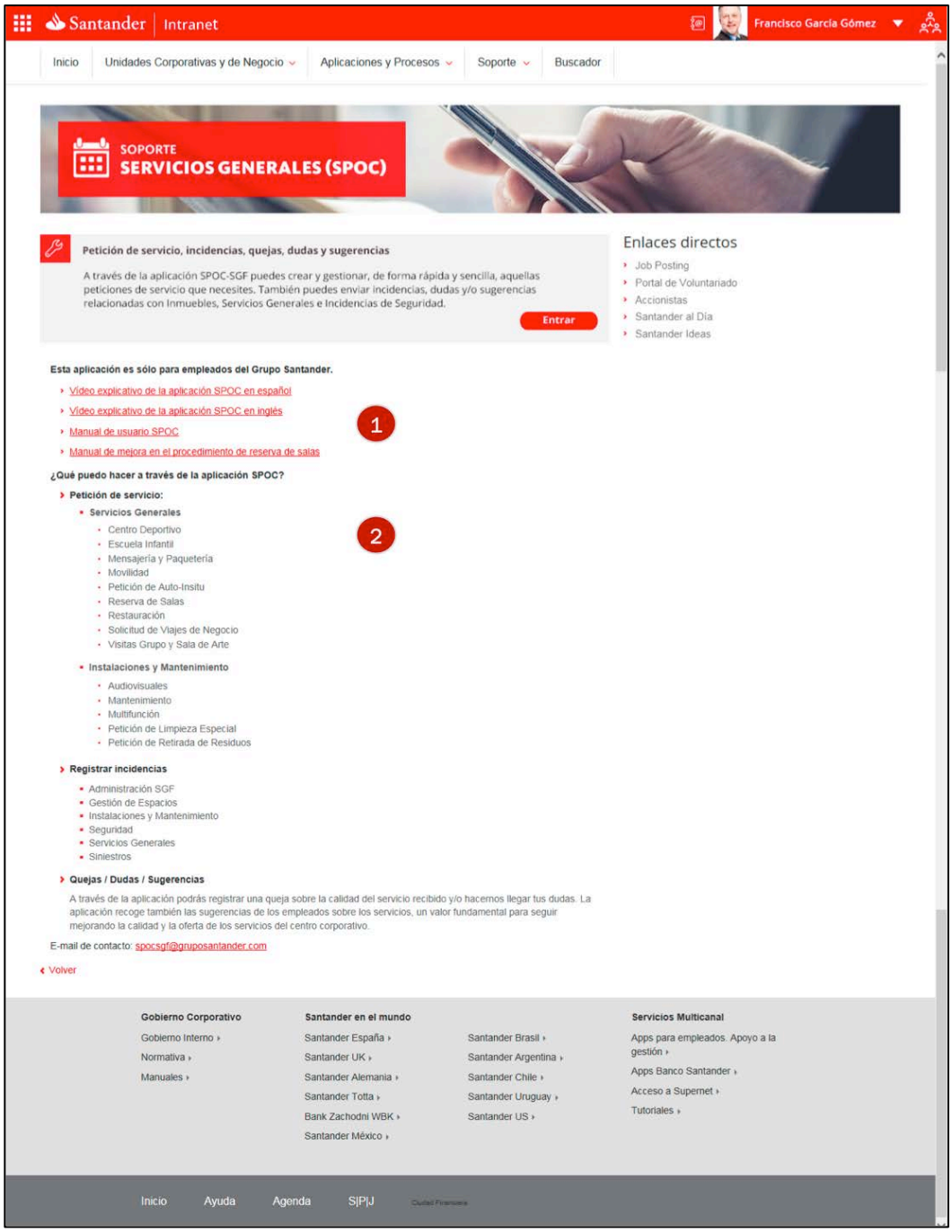


Image 137. Santander Group Intranet Support Page. The support page offers links, videos, and documentation. *Santander_17_Content-level-page-with-interesting-or-helpful-information_Live.png*

General Support Services Highlights

1. **Videos and documentation.** Instructional videos and documentation manuals appear at the top of the page. These features let employees delve deep into a problem and teach themselves how to proceed. It's helpful to let people learn on their own, rather than call support every time they have an issue.
2. **Links to assistance.** Many administrative items, such as moving and IT help, are consolidated on this page. Employees don't need to gather helpful support information from multiple sources, as this page does the work for them.

Corporate Culture Campaign

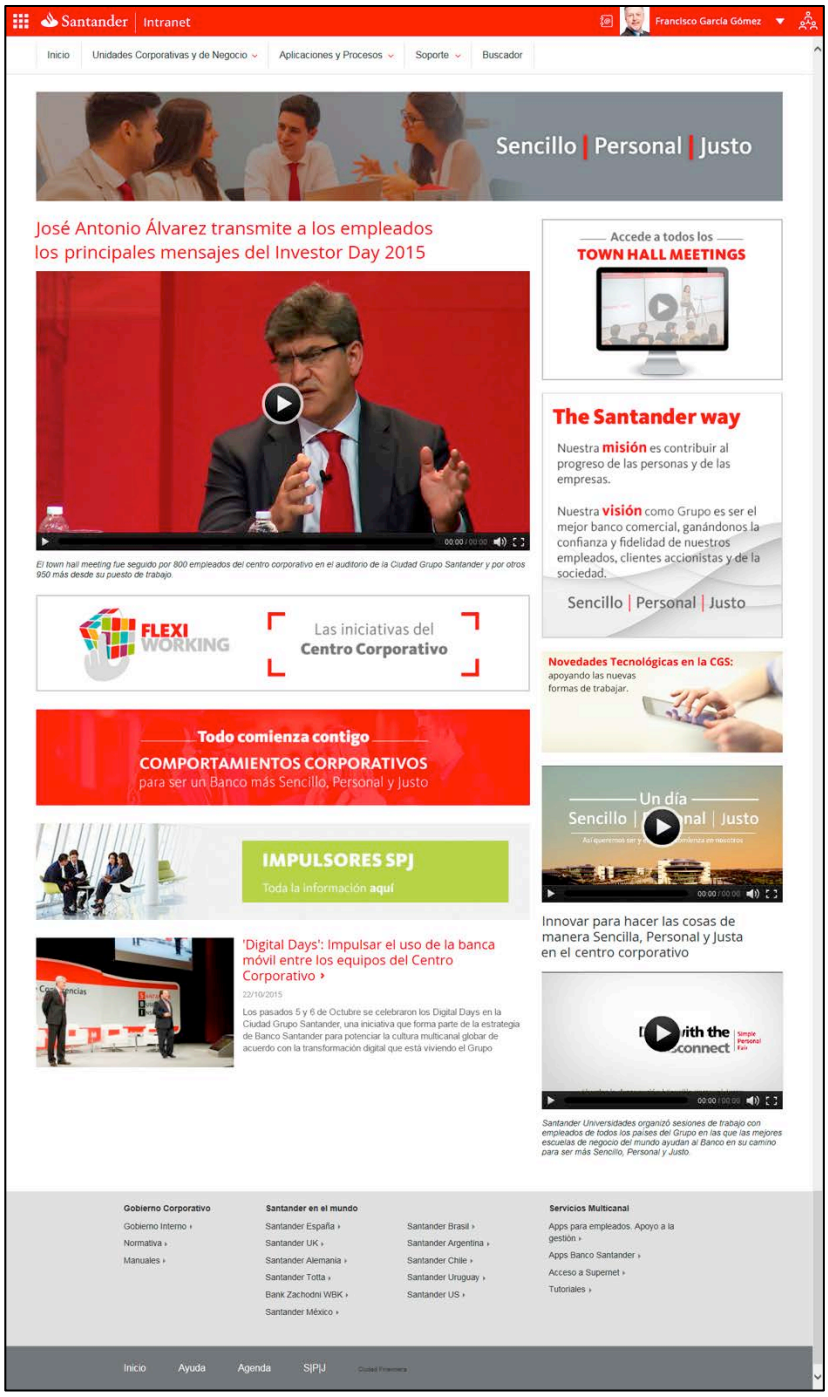
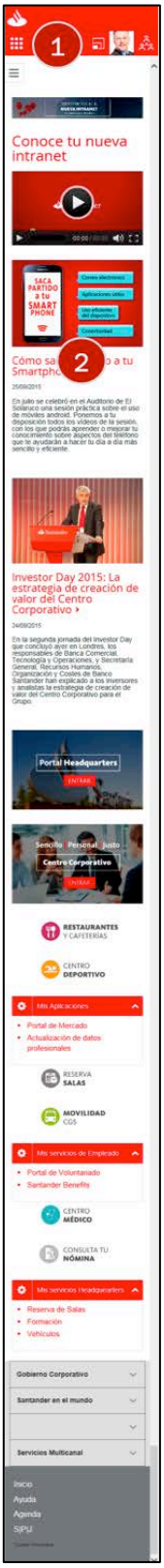


Image 138. Santander Group Intranet Corporate Culture Campaign. The corporate culture campaign unifies the company's many employees. *Santander_18_Page-about-a-particular-team-or-department_Live.png*

Corporate Culture Campaign Highlights

"Simple, Personal, and Fair" is Santander's corporate culture campaign, and it's far more than just a slogan. Rather, it represents how the Santander employees think and operate. More importantly, it defines what Santander customers expect of them, and how Santander interacts with customers, shareholders, and society. This type of campaign and supporting site are invaluable to communicate these norms to all employees, and to remind them what the organization as a whole believes is important, and how it wants to be perceived by the public. This corporate culture microsite includes news, videos, initiatives, and lines of action to sustain the campaign.



Responsive Design-Phone

Image 139. Santander Group Intranet Responsive Design — Phone. The intranet is responsive, and it flows to display well on a phone. Santander_19_Mobile-view-of-the-intranet_smartphone_Live.png

Responsive Design-Phone Highlights

1. **Menu collapses:** To accommodate the small mobile screen, the horizontal menu collapses to a hamburger menu.
2. **Content flows:** In this responsive design, the content sections are rearranged to flow well on a small phone screen.



Responsive Design-Tablet

Image 140. Santander Group Intranet Responsive Design — Tablet. The responsive design flows to display well on a tablet. *Santander_20_Mobile-view-of-the-intranet_tablet_Live.png*

Responsive Design-Tablet Highlights

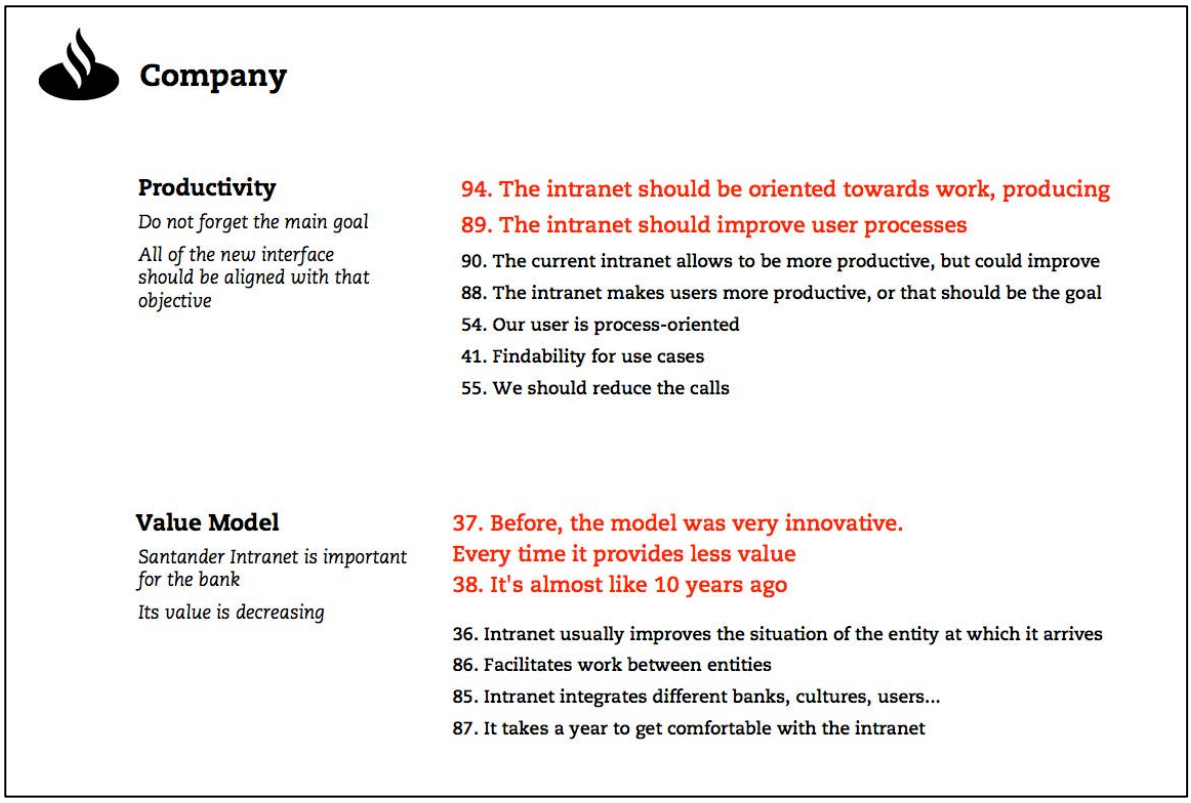
1. **Menu wraps:** To accommodate the tablet screen, the horizontal menu wraps lines.
2. **Content narrows:** In this responsive design, the content sections decrease in width and sometimes move to flow well on the small phone screen.

DESIGN PROCESS AND USABILITY WORK

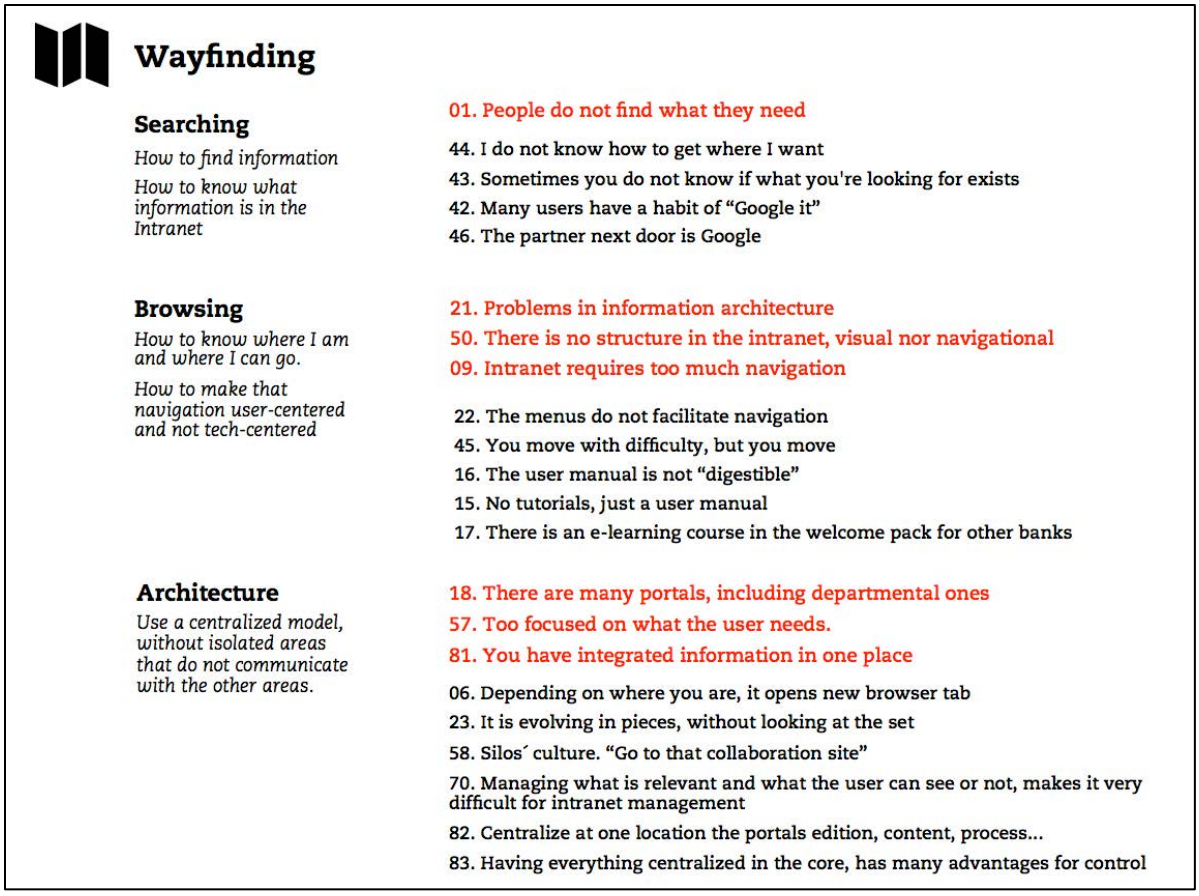
Employees at Santander Group were clamoring for a change, and the technology team felt it needed to surprise them with a new and innovative intranet design. The team also felt that it needed help from experts (other companies, in other sectors) to bring additional perspectives and skills to the project. The internal team therefore partnered with a design agency to help it conduct workshops and mine the organization for storytelling opportunities that would lend themselves to the new intranet tools and features. Given the complexity of Santander Group, having a partner throughout the process helped ensure the project's success.

Following is an overview of the design process activities they used to arrive at the new design:

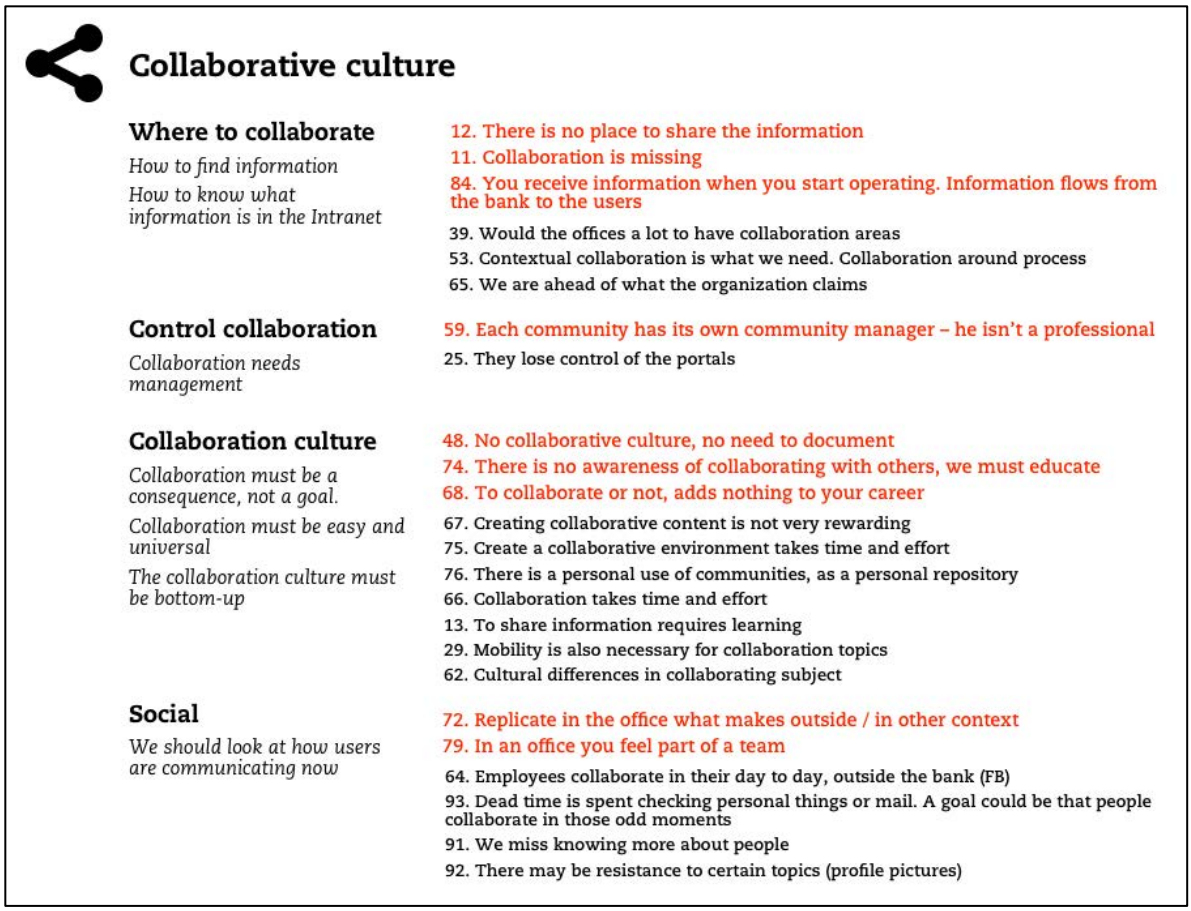
- **Workshops.** Team members conducted workshops with users and arrived at a set of use cases. These use cases helped them get a better picture of how users interacted with the existing intranet and what that would mean for the new model. Through this workshop process, the team arrived at the concept of a model comprised of an intranet and multiple portals.
- **Requirements.** The first task in the workshops was to determine a list of requirements. By the time they were done, the list included nearly 100 requirements.
- **Categorization.** The next step was to categorize the requirements into four overarching areas:
    - **Company:** Facts about strategy and intranet objectives.
    - **Wayfinding:** Facts about content organization, navigation, and the intranet model.
    - **Collaborative culture**: Facts about how to share information and build a real community.
    - **User profiles:** Facts about users, their needs, and their context.



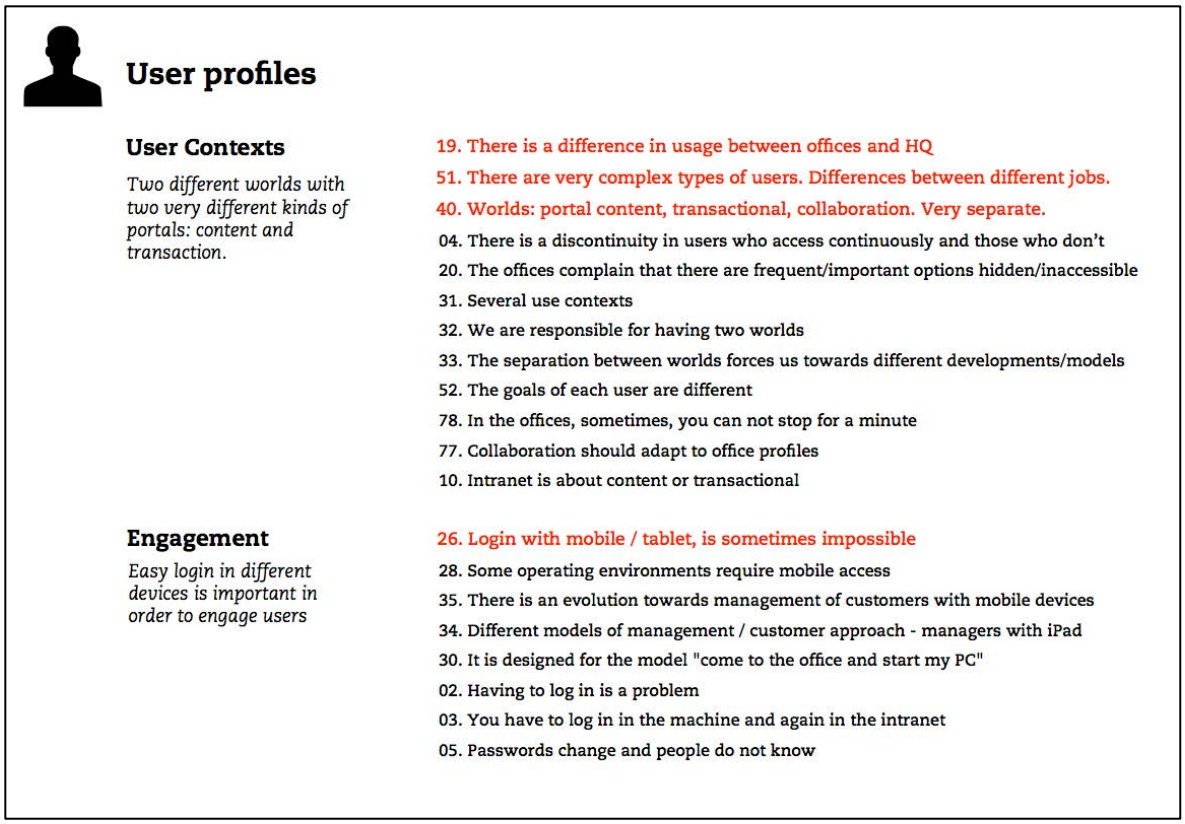
This shows the classification of company requirements the team arrived at through design research activities.



This shows the classification of wayfinding requirements the team arrived at through design research activities.



This shows the classification of collaborative culture requirements the team arrived at through design research activities.



This shows the classification of user profile requirements the team arrived at through design research activities.

- **Use cases.** The project team also worked on use cases during the workshops. These uses cases had to be drawn from the list of requirements generated at the initial sessions. The objective was to illustrate users' needs.
- **Technology definition.** With the initial research in hand, the team worked with software and functional architects to transform the research into technology requirements, exploiting each of the defined use cases through this process.



This diagram shows a project phase in which the team took time to reflect on how the new model would help employees in their daily work. This sketch represents the team's thinking process.

- **Usage data.** The design team analyzed the usage data it had from the existing intranet portals, which included various aspects of use: times of access, most-used applications, and the navigation flow.
- **Prototype.** The team built a navigable responsive design prototype with all the proposed features and demonstrated it to different groups on PCs, iPads, and Android devices. This exercise was a key point for the project's success.

The design research was a success on two fronts. First, the design team established the user as the central focus of its efforts by applying an efficient working methodology and coming together as a multidisciplinary team. In addition, the data gathered through these various exercises helped the team create the basis for the new intranet model, which let users access several portals and applications, with the intranet as the nexus point.

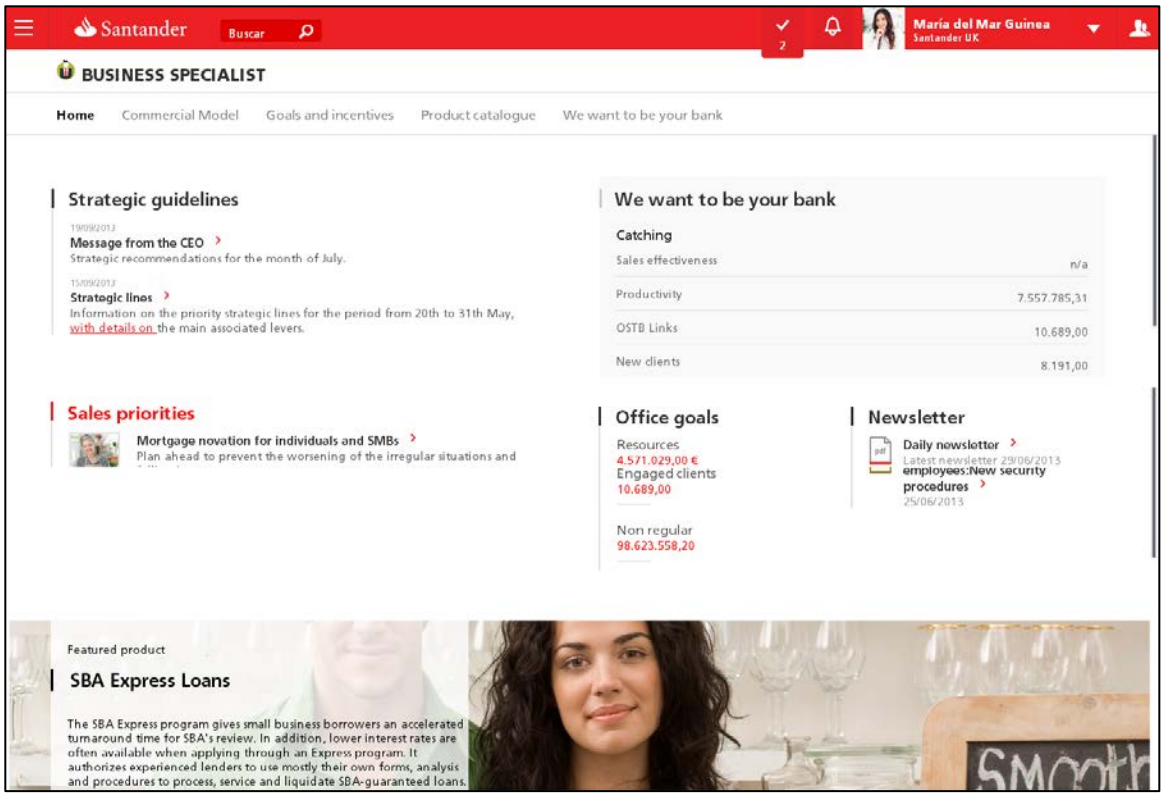


Image 141. Santander Group Intranet Responsive Design Prototype. The design team built a navigable responsive design prototype with all the proposed features, and demonstrated it to different groups on PCs, iPads, and Android devices. This image shows a version of that prototype for the Santander intranet design-in-progress. *Santander_21_Prototype.png*

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Sprint Final UX design and research consultancy	• Supported the final tweaks in the styles and marked the final styles in the portal modules' CSS
DesignIT Global strategic design firm	• Provided support for the conceptual part of the new model and previously and contributed to a previous project's implementation.

GOVERNANCE

The main sponsor of the Santander intranet is the Corporate Communication team, along with Corporate HR team and the Corporate Organization team. These teams manage all types of client- and employee-focused communications for different channels, including the intranet, internet, Twitter, and the press.

Together, these teams defined the new architecture of the company's portals, helped retire old portals and obsolete content, and redefined the intranet UX. This collaborative relationship has provided a positive impact for the intranet as a whole, with the various owners collaborating, bringing in new ideas, and being patient with the inevitable delays in a project of this size and scope.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Corporate Communication Team	Maintains intranet ownership and manages • All content and information that appears on the intranet • The technology evolution of the intranet and portal • Communication
Corporate Human Resources Team	• Provides new employee-related content, documents, and information
Corporate Marketing Team	• Provides design validation
Corporate Technology & Operations Team	• Oversees change management • Coordinates the needs of previous teams • Manages budget for implementation, deployment, and contribution teams
Service Level Team	• Oversees intranet maintenance • Provides incident reports

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	• http://santanderaldia.intranet.gs.corp/ • **Mobile:** http://ssccboa.aacc.gs.corp/Estatico/Comunes/Mobile/html/login.html
Default Status	• Default portal: Home portal
Remote Access	• Remote users can access the intranet through the corporate VPN

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2005	• First company intranet
June 2013	• Launch redesign of intranet model
June–September 2013	• Workshops, storytelling, concepts, and conceptual redesign
October 2013–April 2014	• Work with architectures (software, functional, technical, security) and UX teams to determine which technologies will be used in each functionality
May 2014	• Approbation by management
June 2014	• Budget management and presentation of the project in all areas
June–September 2014	• Requirements with corporate teams
June–October 2014	• Write technical and requirements documentation
October 2014	• Begin the software implementation (frameworks and portal)
February 2015	• Certification by test teams
March–May 2015	• Deployment in intermediate environments, preproduction environment tests, and pro-staging environment
June 2015	• Deployment in pro-delivery environment
July 2015	• Pilot with users
August–September 2015	• Modify styles in CSS after pilot testing
October 2015	• New pilot with changes • Change and communication management
November 2015	• Launch new version of intranet
November 2015–December 2015	• Handover process to maintenance team
November 2015–present	• Review analytics
Overall redesign timeframe: 2 years	

CONTENT AND CONTENT CONTRIBUTORS

Content Workflow

The workflow for content differs based on the three broad content categories:

- **Intranet content.** This content is created by different business areas, such as the Risks, Government, Audit, and Credit departments; the Corporate Communication team also has a committee that decides which content should be posted and where it will be placed on the pages. Once the committee approves the content, the Content Contribution team makes the updates in the content management tools, FatWire, and Liferay. Prior to publishing, members of the Corporate Communication team review the pages and the content.

  The intranet content workflow consists of three user profiles:

  - **Editor:** Edits the content and widgets.
  - **Expert reviewer:** Reviews the content, the structure and format of the widgets, and the page distribution.
  - **Publisher:** Publishes content, widgets, and portal pages.
- **Portal content.** The Content Contribution team manages portal content. It is responsible for most of the corporate content in the portals and for content contribution across most Santander Group entities.
- **Collaborative content.** All employees can use the collaboration tool and participate in collaboration spaces by generating ideas, posting documents, and so on. There aren't any committees or workflow for this type of content — it is open to all employees.



Image 142. Santander Group Intranet Portal Manager Tool. The portal manager lets people easily move portlets from one location to another. Here, for example, the person is moving portlets from column 12 to column 8. *Santander_22-Content-management_1_Live.png*

TECHNOLOGY

Choosing a Platform

An intranet is a combination of many critical pieces — intranet structure, portals, metrics, single sign-on, and so on. To choose the technologies Santander would use to support these pieces, the team conducted a detailed study, examining user requirements, the company's technology environment, available platforms, time, cost, licenses, and the critical issue of making all this technology work together. The goal was to find a solution that delivered on the following key points:

- **Design:** Align with the latest design trends and be based on responsive design to accommodate the next wave of mobile devices.
- **Collaboration:** Provide space for collaboration and sharing among employees and enable communication among all parties.
- **Participation:** Allow people to evaluate content, fostering communication among employees and allowing the team to better understand employee preferences and needs so it can adapt content accordingly.

- **Easy access:** Enable use of single sign-on via user workstations, facilitating access to the intranet and other portals, applications, and so on, while avoiding the use of multiple passwords.
- **Personalization:** Provide personalized content according to user profile and information selected directly by the employee.
- **Mobility:** Make the intranet available for all types of devices on different operating systems and a range of browsers.
- **Analytics:** Offer a platform that provides information based on how and when employees use the intranet, portals, applications, and so on.

This evaluation process led to the following technology choices:

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Windows 2008/Linux Red Hat v6.2
Bug Tracking/Quality Assurance	• HP ALM — Mercury Quality Center/Sonar
Design Tools	• Photoshop 2015, Sketch
Site Building Tools	• Liferay v6.2
Content Management Tools	• FatWire (Oracle Web center)
Search	• IDOL 7.5
Other Functions	• Microsoft ADSF + SharePoint 2013

ROI

Monitoring Use and Making Adjustments

One of the requirements for the new intranet was that it provide Santander Group with information about usage habits. With this in mind, the team developed the new intranet software with Google Analytics tags. All navigation on the intranet and the portal is registered in the Google Analytics account, giving the team access to reports on: length of visits, the content people are interested in, routes of entry and exit, locations where people are visiting from, and so on.

To extract the most effective data from the Google Analytics tool, the Communication and Technology and Operations teams were trained in its use. The tool allows the organization to effectively monitor which intranet features users are interested in and act on that interest.

The new intranet's quality has encouraged people to use it daily; this increased use is helping the team analyze how to make the intranet even better. "Together with Google Analytics, we know the 'taste' of the user," says González.

The Corporate Communication team modifies page structure, intranet content, publishing times, and other aspects of the new intranet to jibe with how people are actually using the site. Google Analytics has proven a powerful ally in helping the team evolve the intranet in line with the interests and habits of its users.

The team also monitors users satisfaction through engagement surveys; the new intranet scored very high on the most recent survey.



Image 143. Santander Group Intranet Google Analytics Report. This and the screen below show the types of data available through the Google Analytics tool that the team uses to track site usage and make adjustments in response. The Santander team created two Google Analytics roles: one to track intranet metrics and another to track portal metrics. This screen shows the intranet data. *Santander_23_Analytics_Intranet.png*

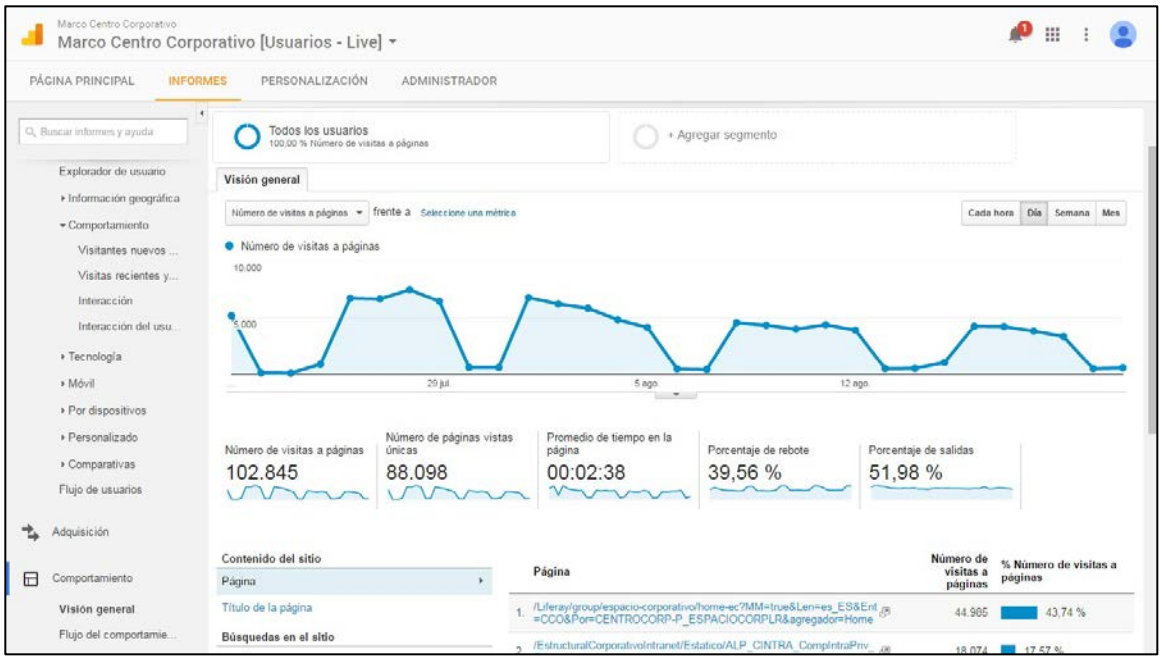


Image 144. Santander Group Intranet Google Analytics Report. This and the screen above show the types of data available through the Google Analytics tool that the team uses to track site usage and make adjustments in response. The Santander team created two Google Analytics roles: one to track intranet metrics and another to track portal metrics. This screen shows the portal data. *Santander_24_Analytics_Portal.png*

LESSONS LEARNED AND BEST PRACTICES

When taking on a big project involving so many different systems, a team must be ready to roll with the punches, knowing that it might make some mistakes but that, in doing so, it will also learn best practices that will inform future decisions.

The Santander team was ready to handle whatever came its way, and in doing so it learned a few things. Portals Project Manager Bosco de Dompablo summarizes those lessons:

- **Don't take things for granted.** "We forgot to consider a secondary cookie the old intranet needed to access some legacy applications. We didn't include this cookie in the new intranet, assuming users wouldn't need to access the old applications, and we were wrong! They did need it. That little mistake made us involve the software architecture and development teams again, late in the project, and of course we had to redo our planning. So I wouldn't take things for granted again."
- **A unified team creates institutional knowledge.** "This project involved more than 100 people, different business areas, and different companies. What we tried to do is encourage them to work toward a common goal, a joint success, and it worked. The whole team worked hard and we built a community of knowledge and fellowship that will be available for upcoming projects."

- **Communication is key.** "Fluent communication with stakeholders can save the project, avoiding deviations between the client's idea and the final product."
- **Transparency is an effective tool.** "We lived by the motto that any problem shall be transparent to the team. We had to be willing to say: 'Team, we have a problem here. What do we do? Who do we involve? There's a meeting in two hours, with software architecture, technical architecture, the security team, and system managers so we can solve the problem and not hide behind the fact that there was a problem to be solved.'"
- **Believe in and encourage the team.** "Every congratulations email or prize won should be communicated to each member of the team, and they all should be congratulated for it."

Tourism New Zealand

OVERVIEW

COMPANY

Tourism New Zealand is the organization responsible for marketing New Zealand to the world as a tourist destination. In a fiercely contested global tourism marketplace, Tourism New Zealand is responsible for ensuring New Zealand remains attractive as a visitor destination internationally. Through the 100% Pure New Zealand campaign, the organization's team of approximately 160 staff in 15 offices takes New Zealand's story to consumers, the travel trade, and the global media, while working with the industry in New Zealand to ensure they deliver on the campaign's promises. Tourism New Zealand is funded by the New Zealand Government.

Headquarters: Auckland, New Zealand

Company locations: Tourism New Zealand has 15 offices across the globe, including in the US, Europe, South America, Asia, Australia, and New Zealand.

Locations where people use the intranet: Employees at all Tourism New Zealand locations use the intranet.

Annual revenue: N/A

THE INTRANET

Users: Approximately 180 people use the intranet. The user population is very diverse in terms of age, time at Tourism New Zealand, English proficiency, locations, role types, and usage types.

Mobile approach: Responsive web design

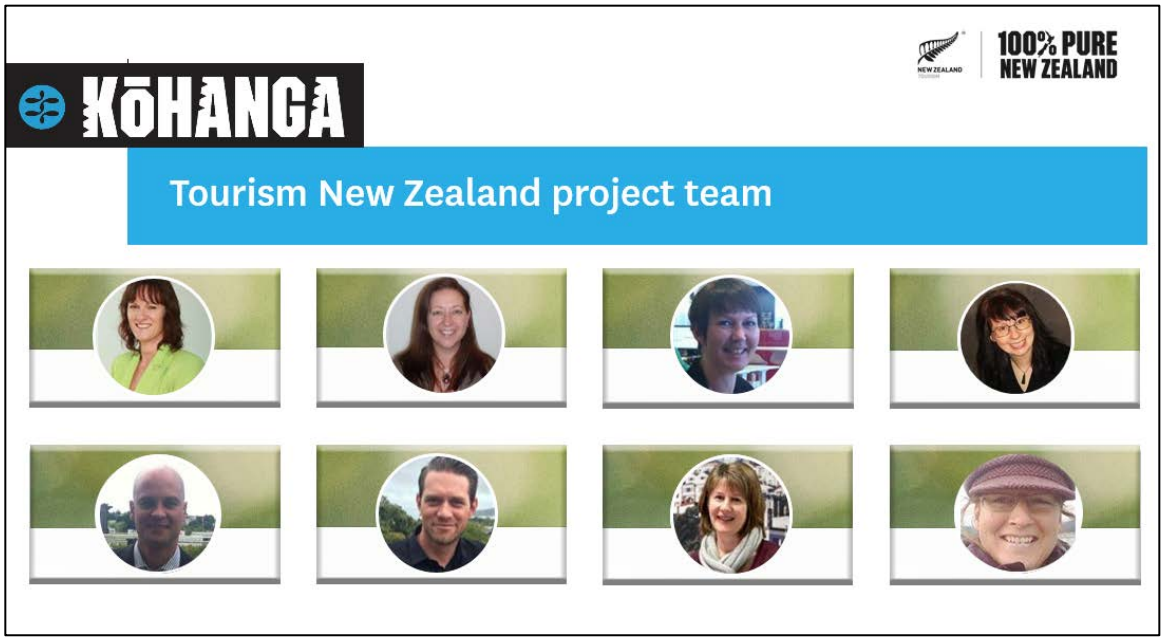
Technology platform: Office 365 (SharePoint online)

TEAM

Project team (internal): Deborah Gray, Project Owner; Sue Parcell, Project Sponsor; Irina Winsley, Project Lead; Brighid Kelly; Matt Moore; Alison Dorrington; David Brem; Christine Adair

Design team (external) Datacom: Katrina MacDonald, Project Manager; Matt Swain, SharePoint Practice Lead; Chris Zhang, SharePoint Architect; Bryan Nimo, Brand and Digital Designer; Trudy Evans, Content Strategist; Keshwal Prakash, Test Analyst

INTRANET TEAM



Team members shown here (left to right, top row): Sue Parcell, Deb Gray, Brighid Kelly, and Irina Winsley; (left to right, bottom row): Matt Moore, Dave Brem, Alison Dorrington, and Christine Adair.

HIGHLIGHTS ABOUT THIS WINNER

Faced with an aging intranet designed to support only desktop usage, the Tourism New Zealand (TNZ) intranet team set out to refresh the site and encourage collaboration and communication, regardless of employee location or device.

TNZ is headquartered in Auckland and made up of 180 people of diverse backgrounds working out of 15 offices across the globe. In just seven months, the team worked with Datacom to create Kōhanga, a new responsive site — built on Office 365 and SharePoint Online — to support users around the world.

- **Responsive design.** The new site uses responsive design to deliver content to all employees, regardless of device. The same information is available across all device types. The switch to responsive design also helped streamline ongoing site maintenance; this was essential, as only one full-time employee is allocated to manage and maintain the site.
- **Rewritten content.** Every piece of intranet content was catalogued and prioritized, and new content needs were identified. Content was evaluated based on age, relevance, quality, length, and usage, and decisions were made to keep, delete, or merge the information. All content was rewritten in plain language, which was particularly important for non-native English speakers. The content lead worked closely with content managers to encourage the use of shorter words and sentences and avoid acronyms and uncommon words.

- **Building excitement.** The team built excitement around the new site by including employees from around the organization throughout the development process; more than 25% of staff was ultimately involved. Team members created launch activities to encourage use, distributed a one-page introduction to the new site highlighting key features, and used regular staff newsletters to build anticipation via a launch countdown. On launch day, intranet champions and project team members throughout the organization presented the new site to staff.
- **Encouraging social participation.** A key goal for the site was to encourage storytelling in order to connect people. The team integrated Yammer throughout the site to encourage employees to share and interact. The prevalence of Yammer content showed employees the tool's importance. Executive team members were encouraged to share ideas and communicate via Yammer as well to lead by example.

  Early on, some employees were hesitant about Yammer, as they did not understand its role on the site. People were overwhelmed, asking if they had to read every little thing that came across their feeds. The intranet team reassured them: of course not. Yammer is for "nice to know" information: conversations, polls, questions, competitions, and sharing photos and videos. Knowing that Yammer's fast-paced nature does not lend itself to having every item read, the team puts all "need to know" information in the homepage news carousel.

  The team found that making this distinction between "nice to know" and "need to know" not only made people more confident in using the site, but it also made them more comfortable using Yammer to communicate. People no longer had to wonder if a piece of content was important enough to post — on Yammer, anything was OK.

  Yammer had a soft launch with the organization's intranet champions a few weeks before the full site went live. The new tool went viral, with all staff members joining within a week. By the time the new intranet was live, rich conversational content was available in all Yammer feeds.

BACKGROUND

The old TNZ intranet was rapidly becoming irrelevant for the organization's users. It was inaccessible on mobile devices and outside the TNZ network. Intranet pages were too visually busy and hard to read, with too much text and scrolling. The result was that people were struggling to find information, and content managers were struggling to keep the content up-to-date. Some people did not even know there was an intranet.

The company needed a new intranet, but it also needed a new approach that would meet its staff member's mobile-first needs. The following business goals were outlined for the project:

- **Enable collaboration.** Create a collaborative environment that supports the organization's mission, vision, and values and supports knowledge-sharing across TNZ by connecting people across the organization, regardless of their location or device.
- **Create a hub.** Make the new intranet a single, intuitive point of access to TNZ tools, systems, and information.

These goals are not exactly the low-hanging fruit of the intranet space, and the team knew they would be difficult to achieve. "It takes many levels to win the game," says Irina Winsley, Information Manager. "We were starting this game from level one, developing a new intranet on the Office 365/SharePoint online platform. We've been using SharePoint for a number of years and therefore were familiar with the capabilities of this platform. However, this project was our first experience with developing a system in the cloud on the Office 365 platform."

The old intranet was designed in 2001, with only one revamp in 2005–2006. Much had changed since that redesign — TNZ's culture and work practices included. The organization now emphasizes staff storytelling, knowledge sharing, and collaboration, and none of this was reflected in the old intranet. Not surprisingly, many of the organization's offshore staff claimed they were not using the old intranet at all.

Although TNZ has only 160 or so full-time staff members, they are spread across many regions and time zones. The organization has 15 international offices, some of which are very small, with only one or two staff members. With an intranet that was not focused on mobile-enabled users, it was a challenge to connect and create business value for all the staff in all regions and offices on a single platform. Lacking the right tool, people were defaulting to the old standby of email and drowning under the weight of the *Reply All* ogre.

"With the redesign, we wanted our new intranet to provide a platform for Tourism New Zealand people to bridge physical location barriers, participate, find information, and hone their storytelling culture," says Deborah Gray, General Manager Corporate Affairs.



Image 145. Tourism New Zealand Intranet Old Homepage.
TourismNZ_01_OldIntranetHomepage.png

DESIGN REVIEW

Homepage

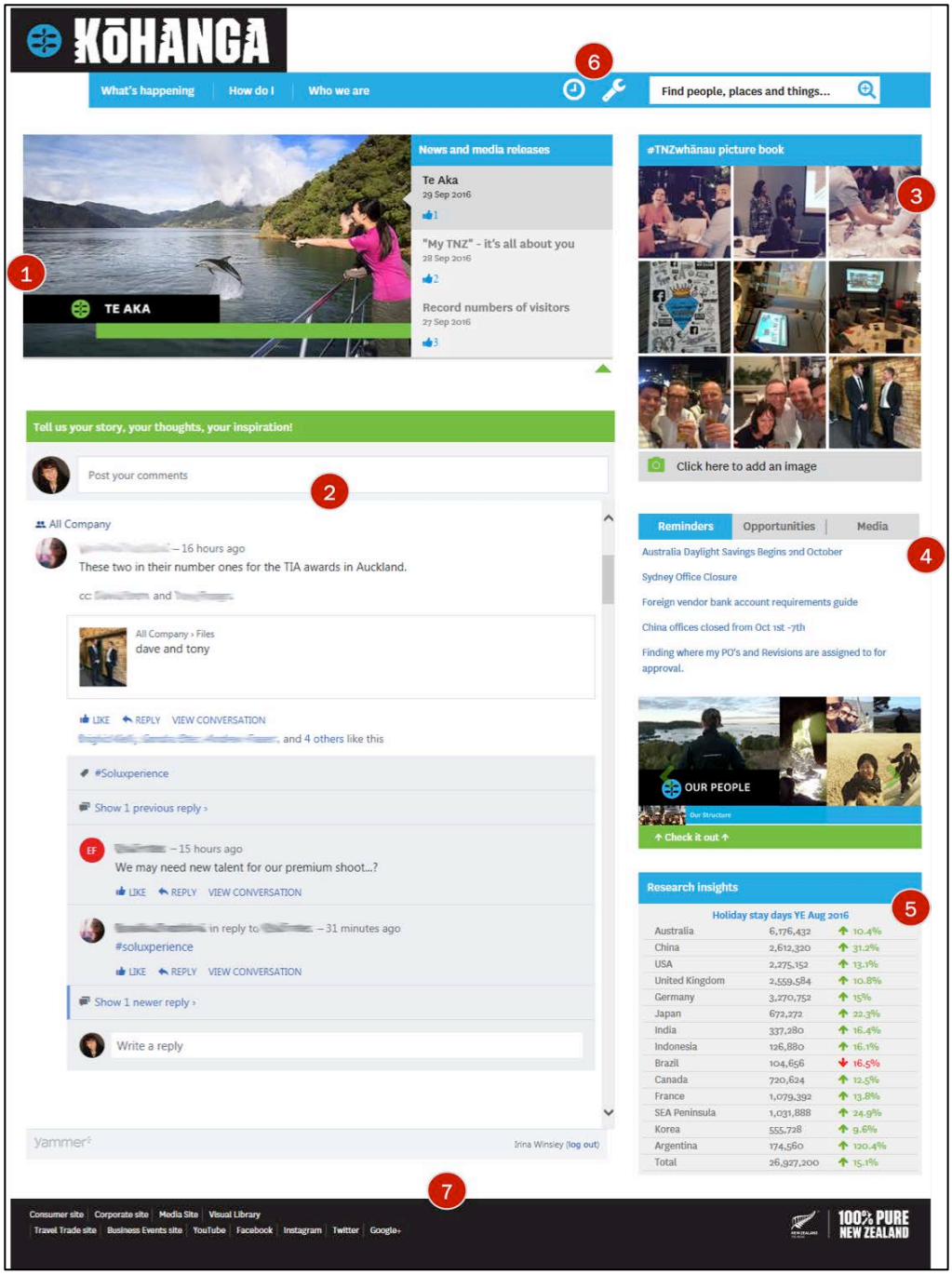


Image 146. Tourism New Zealand Intranet Homepage with Yammer Feed. *TourismNZ_02_IntranetHomepageWithYammerFeed_live.png*

Homepage Highlights

Visual design. The site has a clean, modern look, with plenty of white space balancing out the site's imagery and text. The site also uses colors consistently: pacific blue for banners and headers, fresh green for calls to action, and gray for navigation menus.

1. **Carousel.** The news carousel highlights important information. Although a variety of information is available via Yammer, the site's most important "need to know" information is conveyed in the carousel. Each item is summarized on the left side, letting visitors scan headlines and immediately access items of interest. Each item includes the date it was posted and the number of likes it has received. Corporate Affairs posts all corporate news and media releases, but anyone can post a comment.
2. **Yammer.** Yammer is integrated throughout the site, including on the homepage. Such a prominent placement reflects the tool's importance in the new site. This encourages people to communicate and share information. It also keeps content on the homepage and throughout the site new and dynamic.

   The tool's heading prompts participation. The heading, *Tell us your story, your thoughts, your inspiration!*, is followed by the user's picture and a prompt to *post your comments*. The homepage view is the *All Company* Yammer feed, which includes all messages posted to groups the user belongs to, as well as posts to the *All Company* group. People can easily post, comment, or browse.
3. **Picture book.** The *#TNZwhanau picture book* offers a continuous stream of pictures of employees in action and acts as a quick visual snapshot of what's happening across TNZ. Any employee can post via desktop or mobile using a Yammer app. A clear call to *click here to add an image* encourages people to post and share pictures.

   The feature, which was conceived as a way to offer the "week in pictures," has been very popular. The site is also reusing some of the images in other ways, such as accompanying news items. The team now has a huge repository of images of employees at work, and is thus well positioned to avoid using generic stock photography on the site.
4. ***Reminders*, *Opportunities*, and *Media*.** The homepage's right side includes a tabbed section to keep people informed about time-related information, such as *Reminders* about office closings or planned outages, as well as *Opportunities* and *Media* sections.
5. ***Research insights*.** The site's *Research insights* section presents information related to company-wide KPIs. One of these indicators is displayed on the homepage: Holiday visitors from key countries. Posting performance information on the homepage emphasizes the information's importance while also keeping all employees informed of status or changes.
6. **World clock and tools.** The navigation bar includes access to a world clock, featuring the current time in offices around the globe and quick access to tools people need for daily work. The tools include access to workspaces for

internal and external collaboration. Teams, projects, and communities of practice have collaboration sites, and people can request one via a simple request process intended to avoid duplication and ensure all sites have well-defined goals. Quarterly audits ensure timely removal of redundant workspaces.

7. **Footer.** The page footer includes links to related external sites such as the *Consumer site* and *Corporate site*, as well as links to the organization's presence on social media.

Navigation

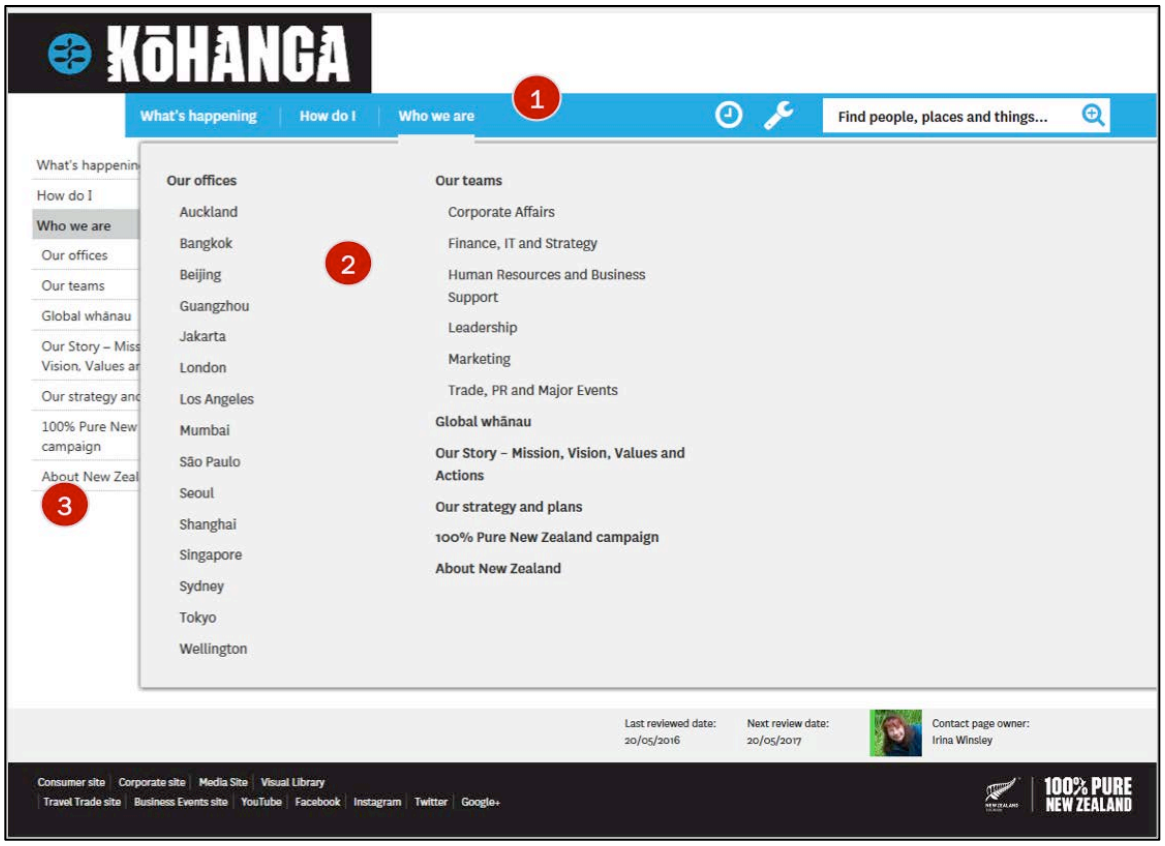


Image 147.Tourism New Zealand Intranet Megamenu.
TourismNZ_03_WhoWeAreSectionMegamenu_live.png

Navigation Highlights

1. **Main categories.** Site content is arranged under three main categories: *What's happening*, *How do I*, and *Who we are*. *What's happening* includes news, events calendar, media updates, presentations, and research; *How do I* includes procedural instructions for completing work-related tasks; and *Who we are* includes information about the organization.
2. **Megamenu.** The megamenu design gives people quick access to information. The menus are arranged with bold categories followed by indented subcategories to help people understand the hierarchical structure and find what they need. The team made sure to use plain language for all labels, avoiding unexplained abbreviations or meaningless jargon to make sections as clear as possible.
3. **Local navigation.** The side of the page displays the user's current location. The main section is highlighted with a gray background and bold text. Subsections are listed beneath, matching the order of the subsections in the megamenu.

Content Page

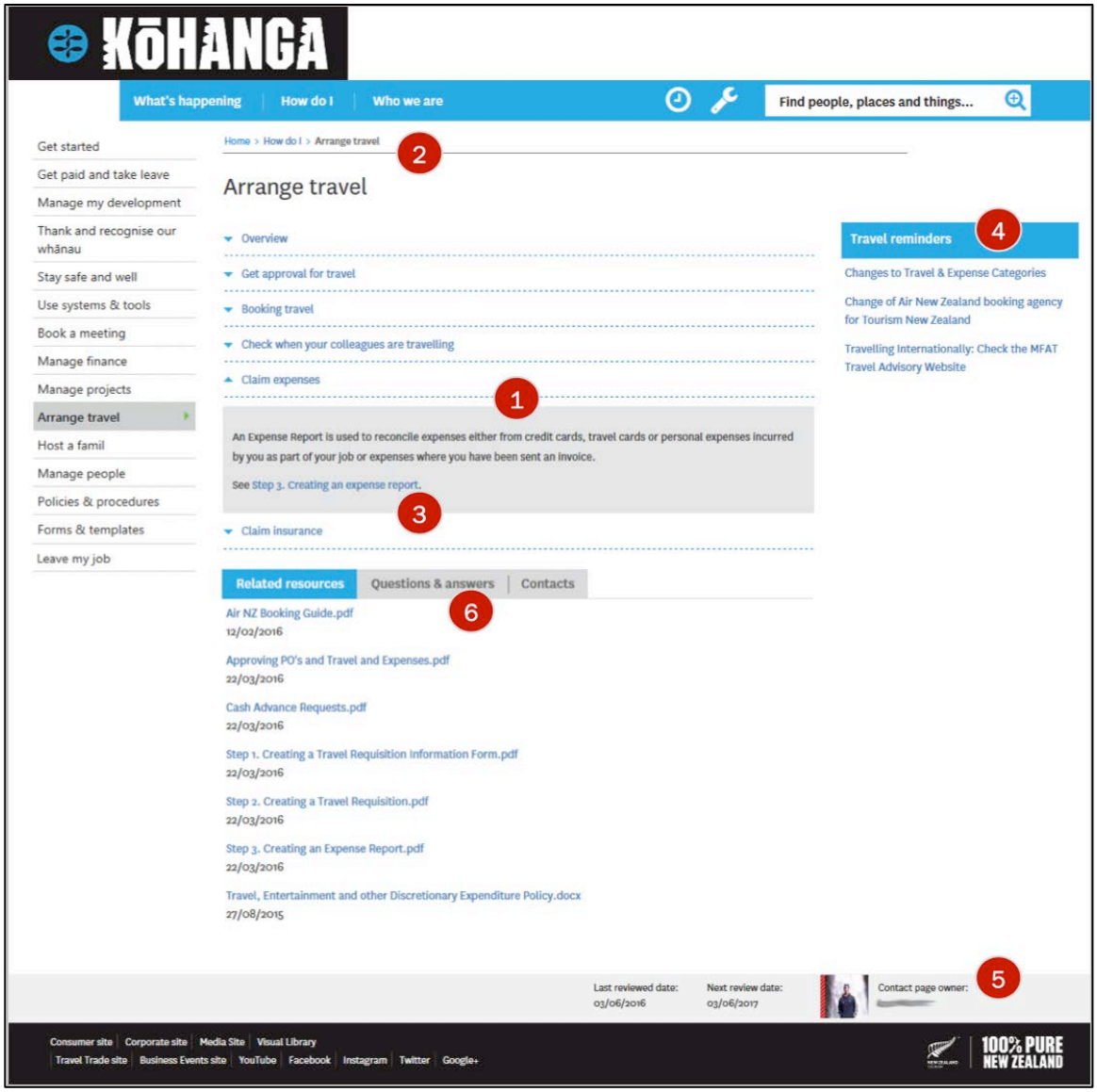


Image 148. Tourism New Zealand Intranet *How Do I*. This is an expanded view of the *How Do I* feature.
TourismNZ_04_HowDoIPageWithExpandedAccordion.png

How do I Highlights

1. **Accordions.** Content pages use accordions where appropriate to categorize information. These act as a page-level table of contents, allowing people to quickly understand what's available on a page and easily choose content of interest. Accordions also translate well to a mobile experience, where a small amount of content can quickly turn into a very long mobile page. In all cases — but especially on mobile — using accordions reduces page length and speeds up information access.
2. **Breadcrumbs.** The top of the page provides navigational breadcrumbs so people can easily navigate to higher levels in the site structure. The links start from the homepage and indicate the section and subsection the user is visiting.
3. **In-text links.** Links within the body of the page lead visitors to relevant information. For instance, information about claiming expenses related to arranging travel link the user to the appropriate instructions.
4. **Reminders.** Timely reminders appear on the side of the page to keep people up-to-date about relevant changes. Reminders are tagged such that they are posted once, but display across any relevant pages. For instance, a reminder tagged with "finance" appears on both the homepage and the *Manage Finance* page.
5. **Page owner.** Page owner information appears at the bottom of each page. This includes the page content owner's picture and name so that employees can contact him or her with questions or comments. The name is color-coded to show the owner's real-time availability: gray = offline, green = available, yellow = away from desk, and red = busy/at a meeting. This functionality is provided by Microsoft Lync (now Skype for Business). This area also shows the date the information was last reviewed and the date the information is up for review; this helps people see how current the information is.
6. **Related information.** Pages in the *How do I* section include links to related resources, a section for questions and answers, and additional contact information.

Research Insights

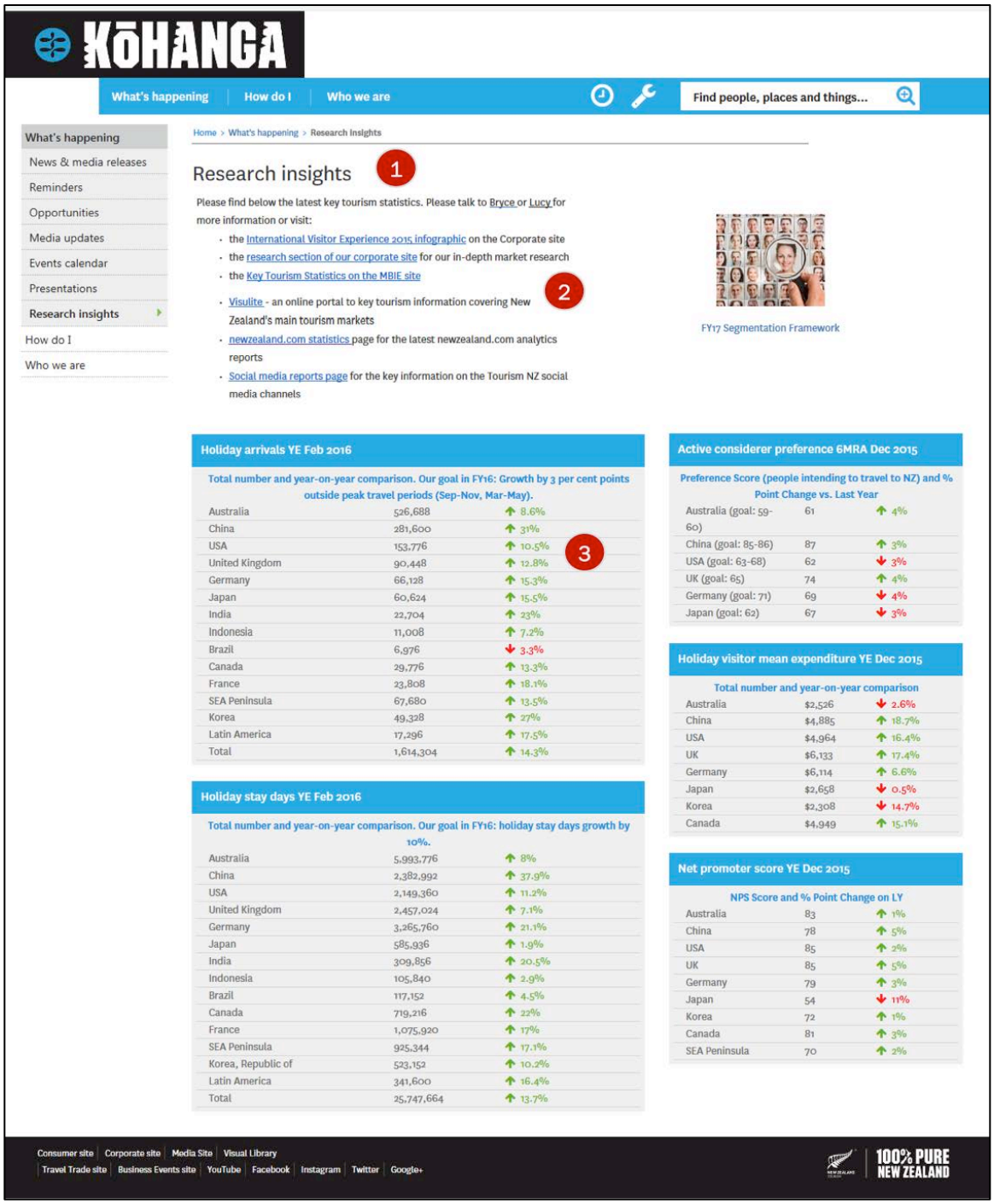


Image 149. Tourism New Zealand Intranet *Research Insights* Page.
TourismNZ_05_ResearchInsightsPage_live.png

Research Insights Highlights

1. ***Research insights*.** The *Research insights* page summarizes important performance information for the organization. For example, all employees have shared KPIs around big picture outcomes, and this information is shared on the *Research insights* page in the *What's happening* section.
2. **Links to additional content.** The page begins with a list of links to sources of key tourism-related statistics. Each source includes brief descriptive text to let users know what to expect behind each link.
3. **Performance summaries.** Each KPI is shown in tabular form, with a clear heading. Some include a summary of the KPI goal, such as "Our goal in FY16: Growth by 3 percent points outside peak travel periods (Sep–Nov, Mar–May)." Each table includes the relevant data and a performance indicator; improved performance is shown in green, with an arrow pointing up, while performance dips are in red, with an arrow pointing down.

Mobile

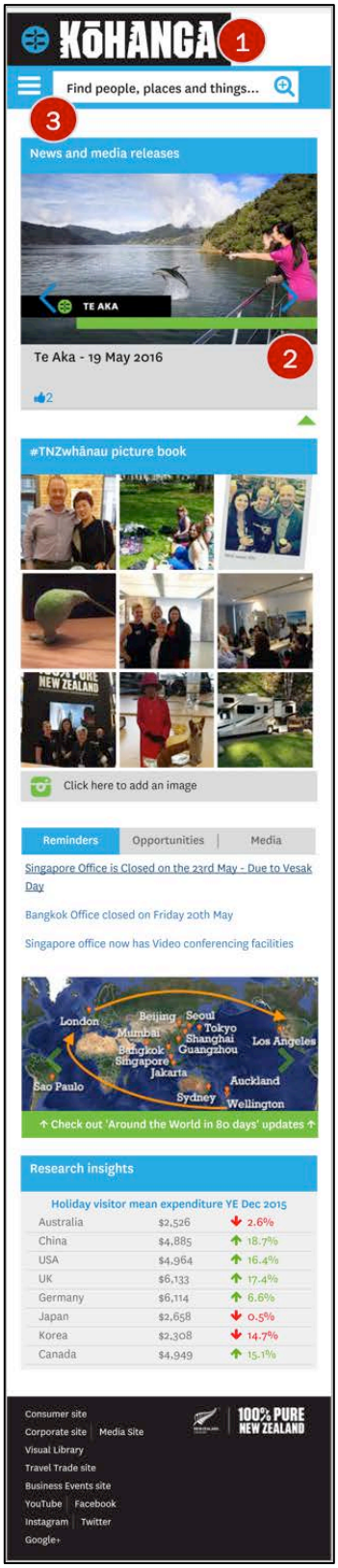


Image 150. Tourism New Zealand Intranet Mobile Homepage.
TourismNZ_06_HomepageMobile.png

Mobile Highlights

1. **Mobile access.** The previous intranet was designed only for desktop use. Having mobile access is a new and essential feature for the travel-related organization. In fact, some frequently traveling employees did not even realize TNZ had an intranet. Now the site is available to all employees as they travel, attend conferences and events, or simply work outside the office. All intranet information is available across all devices.
2. **Prioritization.** Information is shuffled in mobile views so that the highest priority information appears first on the page. The news carousel appears at the top, followed by the picture book and *Reminders*. *Research insights* appears at the bottom of the homepage. The Yammer feed is hidden when the Kōhanga homepage is viewed on mobile devices, but people use Yammer via Yammer apps installed on their mobile devices.
3. **Navigation and search.** The top of the page includes a hamburger menu for navigation. The search box is open, with the prompt text to: *find people, places and things....*

Employee Profiles

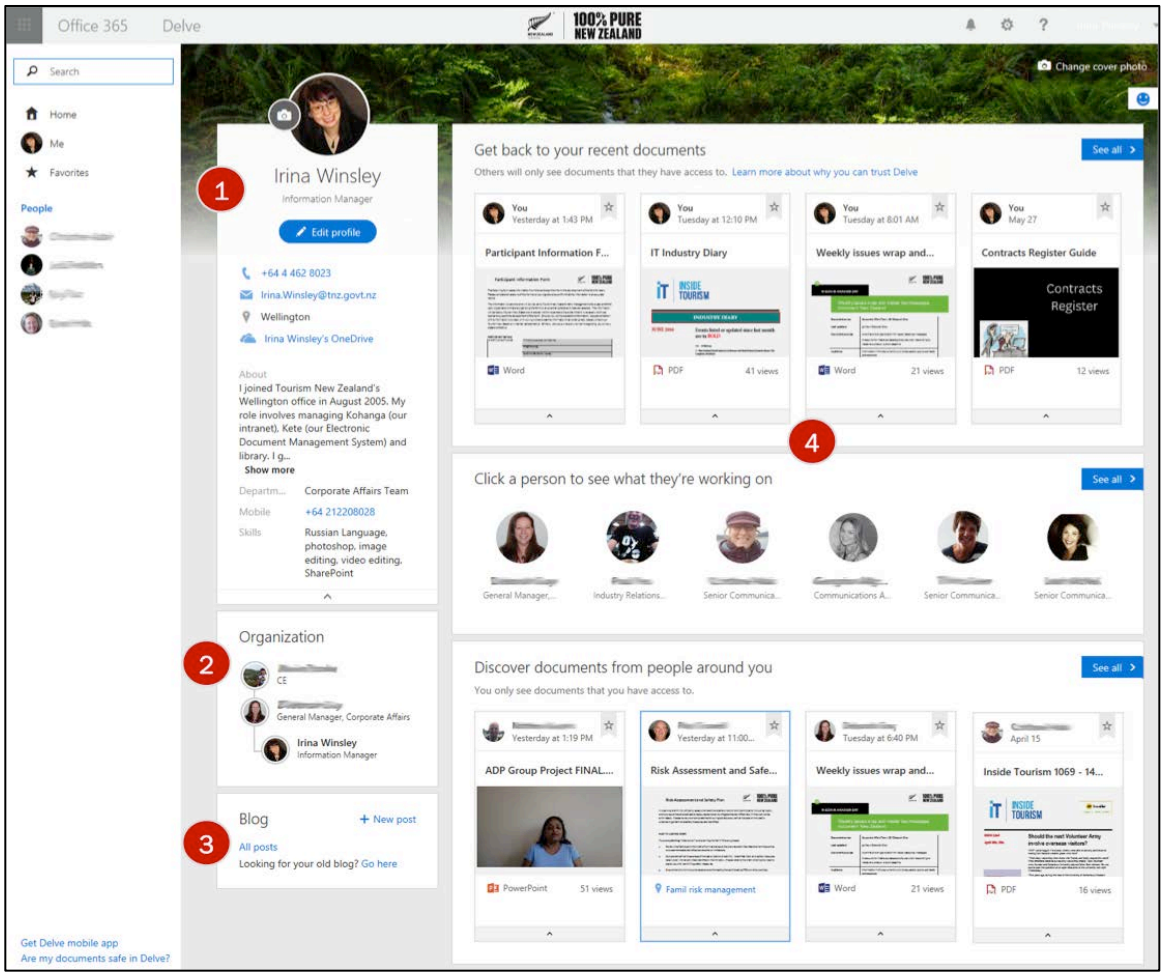


Image 151. Tourism New Zealand Intranet User Profile.
TourismNZ_07_UserProfilePage_live.png

Employee Profile Highlights

1. **Contact information.** Employee profiles provide an employee picture, title, and essential contact information on the left side of the page. Employees can also add an *About* section and information about their skills.
2. **Organizational chart.** An organizational chart appears below the employee details, showing the organization's reporting structure and the employee's place within it.
3. **Blog.** If an employee has a blog, it is available through the employee profile.
4. **Documents and discovery.** The rest of the page displays documents and contacts. The top displays the user's recent documents. Other viewers can see only the documents they have access to. Connections are then listed to provide one-click access to another employee's information. The final section includes links to documents that others are working on, again based on user permissions. This information, part of Office 365's Delve feature, makes the standard employee profile more robust and enables additional knowledge sharing and discovery.

DESIGN PROCESS AND USABILITY WORK

Taking a Multi-Pronged Approach

The project team took a multi-pronged approach to starting the planning and design activities for the new intranet. First, it conducted a series of interactive and collaborative workshops to clarify the requirements. It then developed technical and functional specifications, established the governance framework, developed the content strategy, and created design mock-ups.

Refining the content, navigation, and IA required many online card-sorting and tree-testing exercises, which included participants from different teams, offices, and regions. The team used wireframes as functional prototypes for design, communication, and usability testing, which helped everyone understand what the intranet needed to look like before the team expended considerable time and effort on actual development. Wireframes also helped the team consider various design options before committing resources to a specific design direction.

The design team also used technology to help it deliver the new intranet in a shortened timeframe. This technology included a responsive design approach and Datacom's Social Intranet Accelerator, which delivered mobile-friendly page layouts. Custom SharePoint web parts included in the accelerator package provided the most-requested pieces of functionality on a corporate intranet site, including a news carousel, megamenu, instant search, accordion, and tabbed web parts.

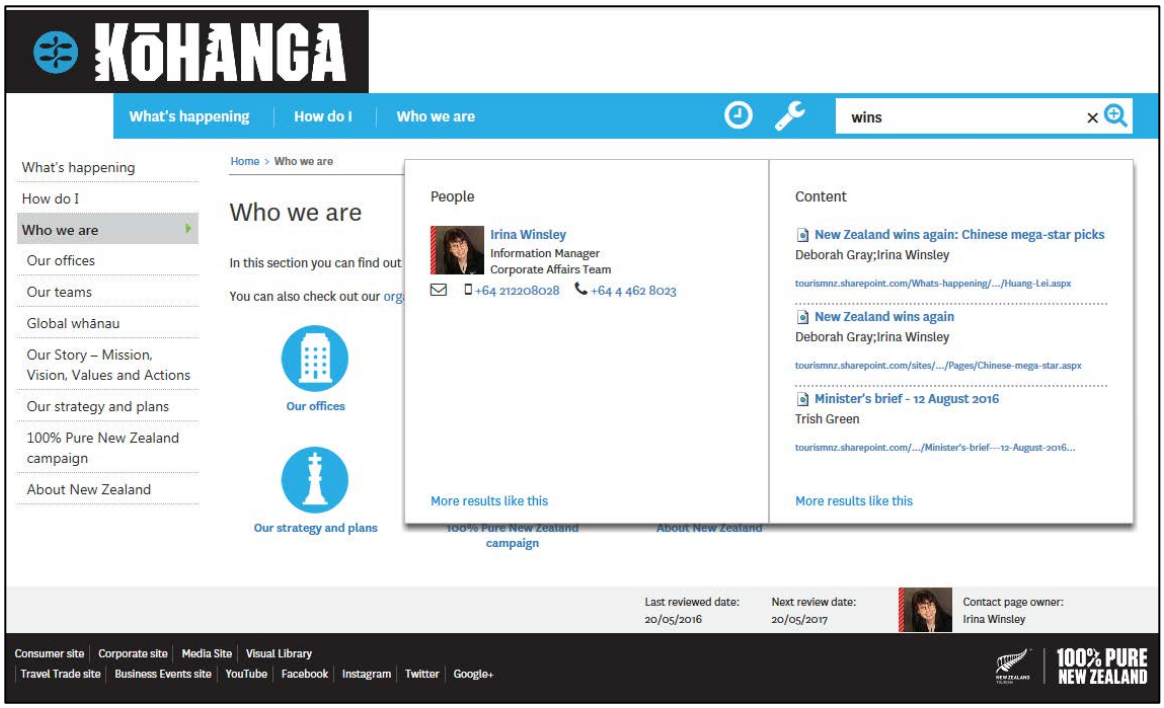


Image 152. Tourism New Zealand Intranet Search. Instant search with type-ahead functionality helps people quickly find the results they need on the TNZ intranet. When users search for a name, the top three people matches are displayed with a name, image, job title, and contact details, along with a link to the full people search. When users search for content, the top three content matches are displayed in instant search, along with a link to the full content search. *TourismNZ_08_InstantSearch_live.png*

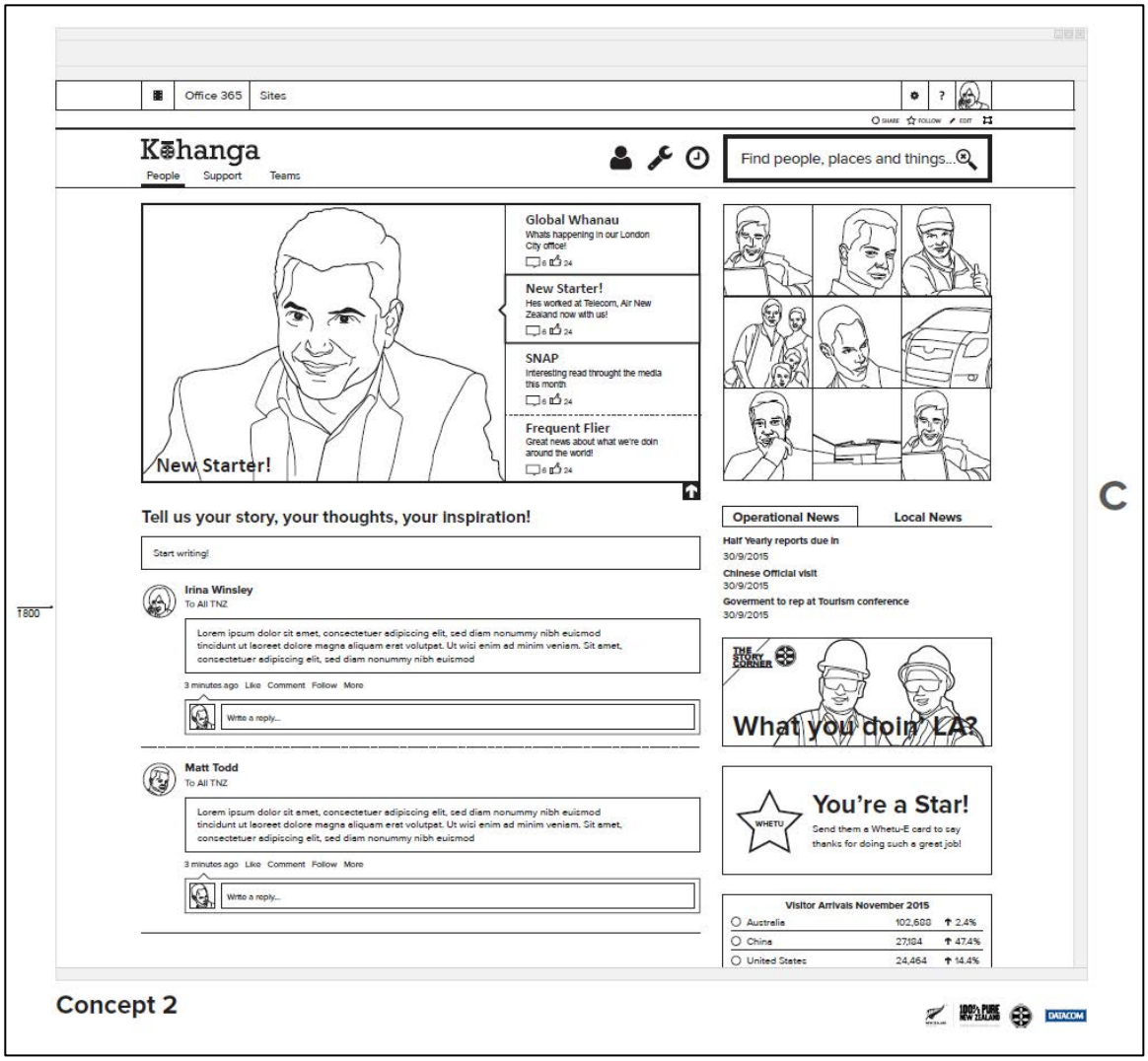


Image 153. Tourism New Zealand Intranet Wireframe. This wireframe shows one of the many iterations the team designed to achieve the final design and functionality. The team used wireframes such as this as functional prototypes for design, communication, and usability testing. The wireframes also helped everyone involved in the project understand what the intranet needed to look like before the team expended considerable time and effort on actual development. Using wireframes, the team could consider various design options before committing resources to a specific design direction. *TourismNZ_09_Wireframes.png*

Ensuring Effective IA

The team simplified the navigation structure and tested it thoroughly with employees, using card-sort and tree-jack exercises to ensure they would not get lost or be confused on the new intranet. Team members also gave people other tools to help them easily find their way around at all times. These tools include using plain language for all labels, section, and page names, and allowing access to all site pages from the megamenu. Breadcrumb navigation is also provided on all pages.

Before the team built all these design tools to help people, it first spent considerable time behind the scenes, cataloging and organizing site content. It then tested the results with card-sorting tools. A group of intranet champions from different regions also helped the team get input from the wide cross section of people involved in the navigation structure testing.

Adoption and Buy-in

This TNZ team made many great decisions to ensure that the new intranet would be a successful tool that people cared about — but getting buy-in right means getting the right people involved in the project from the start. The TNZ team recruited nine people from different teams and offices around the organization to participate in the redevelopment project team. These key people included the General Manager for Corporate Affairs, the General Manager of Finance and IT, and the General Manager of HR.

Thus, the team not only drew from a wide swath of company stakeholders to ensure success, it also put the right people in front of the project, making sure HR, Communications, Finance, and IT were driving the project agenda. Involving these key stakeholders and including them in the decision-making process from day one helped ensure a successful outcome. Further, participation was not just a top-down affair; more than 25% of all TNZ staff were involved in the intranet redevelopment project as project team members, intranet champions, or content managers. The champions in particular proved pivotal from beginning to end.

"We had a fantastic team of intranet champions," says Winsley. "This team was brought together early on, well before any actual work was done, long before we had a supplier in place. Initially, our champions gathered feedback from the entire organization on what the new intranet needed to look like. Then they helped us with running the naming competition."

They also helped test the look and feel and page load speed in different offices, and were heavily involved in intranet launch activities.

The core principle of the organization's user adoption strategy was to involve all staff in discovering how Kōhanga can support their everyday business needs, improve communication, facilitate collaboration, and encourage continuous organizational improvement. The team employed a number of tactics to achieve those goals, including the following:

- Developed and circulated a one-page outline of the new intranet's key features
- Made presentations to the Executive Leadership Team

- Created Yammer groups for content managers, intranet champions, and project team members
- Provided regular updates and a launch countdown in staff newsletters
- Enlisted intranet champions and project team members to present the new intranet to all staff in all offices on launch day
- Provided training and support for all users
- Posted regular tips on how to use Yammer and the new intranet
- Created a series of brief video tutorials for users
- Conducted quick polls posted on Yammer
- Created fun challenges aimed at getting people excited about the site

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Datacom IT company that designs, builds, and runs IT systems and process for businesses	• Developed technical and functional specifications • Conducted navigation structure testing: card-sorting and tree-testing exercises • Provided visual design • Developed governance framework • Assisted with the content strategy development • Developed the new intranet on the Office 365/SharePoint online platform

GOVERNANCE

The Corporate Affairs team is the overall owner of the TNZ intranet. Because this team is responsible for TNZ's internal and external communications, it is very well equipped to be the driving force behind the intranet. The team is comprised of a good mix of communications skills and technical, business, usability, and IA knowledge — all of which are essential for driving the intranet forward. However, the intranet is more than just a communications platform. So, to ensure the intranet's ongoing value as a key internal business tool, the organization's intranet governance group also includes representatives from the HR, IT, and Digital teams.

Three Corporate Affairs team members also played key roles on the intranet development project team: the business owner, the project lead, and the communications/user adoption lead.

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Intranet Sponsor	• Ensure the intranet's success • Ensure that the intranet's required resources are secured, including resources for go-live and ongoing value maintenance
Intranet Owner	• Ensure the integrity of the intranet's information • Lead the intranet strategy for the organization • Manage overall intranet operations
Intranet Redevelopment Project Lead/Governance Group Chair	• Lead the intranet development project • Lead the Governance group
Intranet Development Project Team	• Ensure the smooth and successful execution of the intranet development project
Governance Group	• Champion the benefits of the governance principles • Encourage adoption of agreed-on practices • Assess, arbitrate, or escalate all on-going technology and content management issues • Recommend education and training to support the intranet's continued success • Continuously review and improve the governance framework • Review the content owner list to ensure all areas of the intranet are managed in line with the Governance Framework • Evaluate the intranet's ongoing success • Report performance, findings, and recommendations to the Intranet Owner
The Intranet Manager (Irina Winsley, Information Manager)	• Lead/chair the Governance Group • Manage the intranet's technical aspects (including new site creation, term stores, site navigation, and so on) • Work with other areas of the Technology team to resolve incidents and problems • Provide technical information and guidance to the Internal Communications & User

	Adoption Lead and Site Owners • Provide training to all content managers and project site owners • Create project sites • Maintain project site templates • Close project sites that are no longer required • Prepare monthly analytical reports
Internal Communications & User Adoption Lead	• Manage homepage content • Ensure that CE content is regularly posted and that CE posts responses to comments • Work with the Intranet Manager, Content Managers, and HR team to plan for and support the user adoption process • Produce and update the intranet style guidelines (tone of voice, etc.) as required • Produce training for content managers on writing for the web and provide ongoing coaching and support
Content managers	• Create, review, and maintain content to ensure it is relevant and timely, following best practices for writing for an online audience
Corporate Affairs team	• Generate corporate (official) news and targeted content displayed in the news and media releases carousel on the intranet homepage • Generate the media wraps and issues register displayed under the *Media* tab on the homepage
Project Collaboration Sites owners	• Ensure their sites support users within their project team • Ensure the sites meet both the minimum content standards laid out in the Governance Framework and any additional site-specific requirements (such as specific business requirements)

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://tourismnz.sharepoint.com/
Default Status	The intranet is set as each user's homepage. People can't change this setting.
Remote Access	The intranet can be accessed remotely on any device; the Corporate LAN is not required.

TIMELINE

PROJECT MILESTONES	
Item	**Status**
2001	• Developed the first company intranet on the Shado platform
2005–2006	• Redesigned the intranet on the Shado platform
July 2014	• Set up a project team for the intranet redevelopment project
December 2014	• Supplier (Datacom) selected for the intranet redevelopment project
January 2015	• Began working on developing the new intranet on the SharePoint Online (Office 365) platform
July 2015	• Launched the new intranet on the SharePoint Online (Office 365) platform
Overall redesign timeframe: 7 months (January–July 2015)	

CONTENT AND CONTENT CONTRIBUTORS

Conducting a Content Redesign

For intranet content to be easily consumed by the largest number of people, you must ensure that the content is great — that is, useful, well written, and easy to find. None of that is achieved without effort and planning.

As part of the intranet redesign project, all of the new TNZ intranet's content was rewritten in plain language to make it easily accessible to all of the company's users, particularly those who speak English as their second language. This meant using shorter words and sentences, and avoiding acronyms and uncommon words. The

content team lead worked closely with all of the content managers to make sure these guidelines were followed. Plain language is particularly important for an organization such as TNZ, due to the global nature of its business. "It helps our people to move efficiently through a flow of information to complete their intranet tasks," says Gray.

The key to successful content management long term is to never leave well enough alone; each year, TNZ conducts a comprehensive content audit to review and update all intranet content. The intranet manager and content lead are in charge of these annual audits.

Culling Content

One of the critical pieces of creating great new content is to take a deep dive into the old content before porting it over to the new site. The TNZ team conducted a full audit of the existing intranet content (all pages and documents) and captured its findings in the "Master Content Migration" document. All content was then reviewed and prioritized by the content owners. Content evaluation criteria included content age, relevance, quality, length, and usage; all of these factors were used to make decisions regarding which content to keep, leave, or merge in each topic area.

The intranet team provided a template for content managers so that they could codify the new content that would be required on the new intranet. That template contains fields for key information (including meta data) and also includes brief editorial guidelines.

Good Content Requires a Big Effort

Many content managers were involved in producing the new intranet's high-quality content. The intranet team provided all content managers with training on writing best practices and how to upload content. The team held content loading parties to facilitate the uploading process. At these events, technical team leads were available to assist content managers as they uploaded files.

CONTRIBUTION AND OVERSIGHT **An Inclusive Content Model**	
Contributors	• All TNZ staff can post reminders on the intranet homepage, participate in Yammer groups, post messages on Yammer, and post photos on the *#TNZwhanau* picture book. No approvals or reviewers are needed for this user-generated content. Self-help video tutorials on using Yammer are available to all employees. • The Corporate Affairs team is responsible for delivering corporate content (corporate news and media releases), but all users can post comments on the news items.
Maintaining Quality	• Content managers are given a standard set of templates and styles that ensure consistency across the intranet. The intranet manager and content lead are available to provide training and ongoing support to all content managers to ensure their content is regularly updated, on brand, user friendly, and written in plain language.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Office 365/SharePoint Online
Bug Tracking/Quality Assurance	• JIRA
Design Tools	• Adobe Creative Suite • SharePoint designer, Visual Studio
Site Building Tools	• SharePoint designer, PowerShell for SharePoint
Content Management Tools	• Office 365/SharePoint Online
Search	• SharePoint Enterprise Search for Office 365
Other Functions	• Yammer • The API of Time and Date service is used to provide real-time world clocks for all TNZ offices

ROI

Determining Ways to Measure Success

The TNZ team outlined several clear, specific, and measurable metrics to help define the tangible improvements the organization has realized from it efforts with the new intranet. These measures are being regularly reviewed and refined, but currently include the following:

- **Staff feedback** via an annual engagement survey, annual internal communications survey, and anecdotal feedback
- **Kōhanga statistics,** including the number of unique visitors per day, corporate news item views, and volume of user generated content and likes
- **Yammer statistics,** including the number of active users and the number of posts, likes, and reads

Improvement Measured via Survey Results

The annual internal communication survey measures the intranet's effectiveness as an internal communication channel. The team gathered baseline data in February 2015, six months before the new intranet launched. It then conducted a follow-up survey in February 2016 to track progress toward the intranet's established improvement targets. The results showed a good uptick in intranet usage, with 80% of respondents using the new intranet at least every couple of days. The overall

internal communications rating also improved, with 85% of respondents rating internal communications as excellent or very good overall.

Following are some of the survey comments:

> "The internal communications has improved a lot, and Kōhanga stores a lot of useful information and is easy to navigate."
>
> "Kōhanga is fantastic!"
>
> "One of the best intranets I've used."
>
> "I've never worked for an organization that keeps stuff so well informed."

BEST PRACTICES

TNZ team members share some of the best practices they've learned through the redesign process:

- **Be strategic about change management.** "Change management is a crucial part of the intranet development project. A strategic approach to change management is important for making sure all users are informed about the project and are involved from the earliest stages whenever possible." (Deborah Gray)
- **Governance is what keeps the new intranet running smoothly.** "A good governance framework is the key for ongoing intranet maintenance and future growth. It enables the decision-making and planning processes for the intranet, provides support for the intranet team, and assists with the smooth running of the intranet." (Sue Parcell)
- **Get people involved and keep them involved.** "Incorporate all staff throughout the process to get a better understanding of your users and their needs, as well as help all staff to be a part of the process, part of the change." (Brighid Kelly)
- **Keep it simple.** "Keep it simple. Simplicity and fun are key to user adoption." (Matt Moore)
- **Use photos to your advantage.** "Pictures are worth more than thousands of words. Use them effectively." (Irina Winsley)
- **Plan for mobile first, but don't stop there.** "For internal users, think mobile-first, but not mobile only. Today people use many different devices to handle daily business processes. Start with mobile first by placing mobile devices at the heart of the design and development strategy, and then grow outward to a desktop-friendly version." (David Brem)

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Intranet Design Annual Winners Through the Years: Countries and Industries

2017: SIX COUNTRIES AND EIGHT INDUSTRIES

North America has a strong showing in this year's annual, with two winning organizations from Canada and four from the US. Three European organizations appear in the top 10 as well, with one each from Ireland, Latvia, and Spain. Latvian Railways is our first Design Annual winner based in Latvia. Tourism New Zealand rounds out the list.

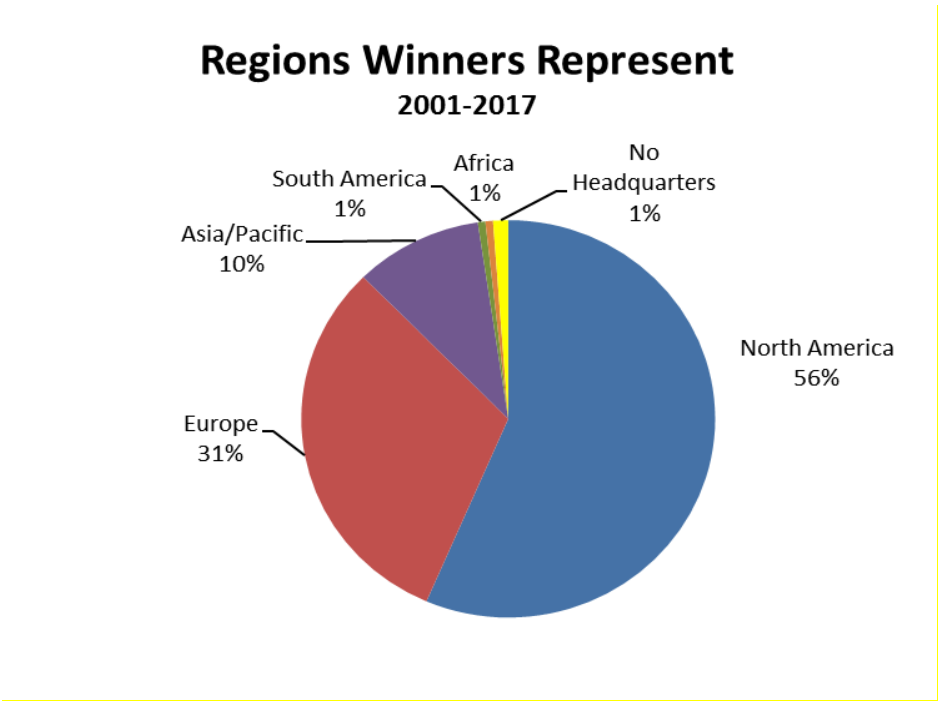
DESIGN ANNUAL 2017 WINNERS BY COUNTRY	
Country	**Number of Winners**
United States	4
Canada	2
Ireland	1
Latvia	1
New Zealand	1
Spain	1

Design Annual 2017 Winners by Country

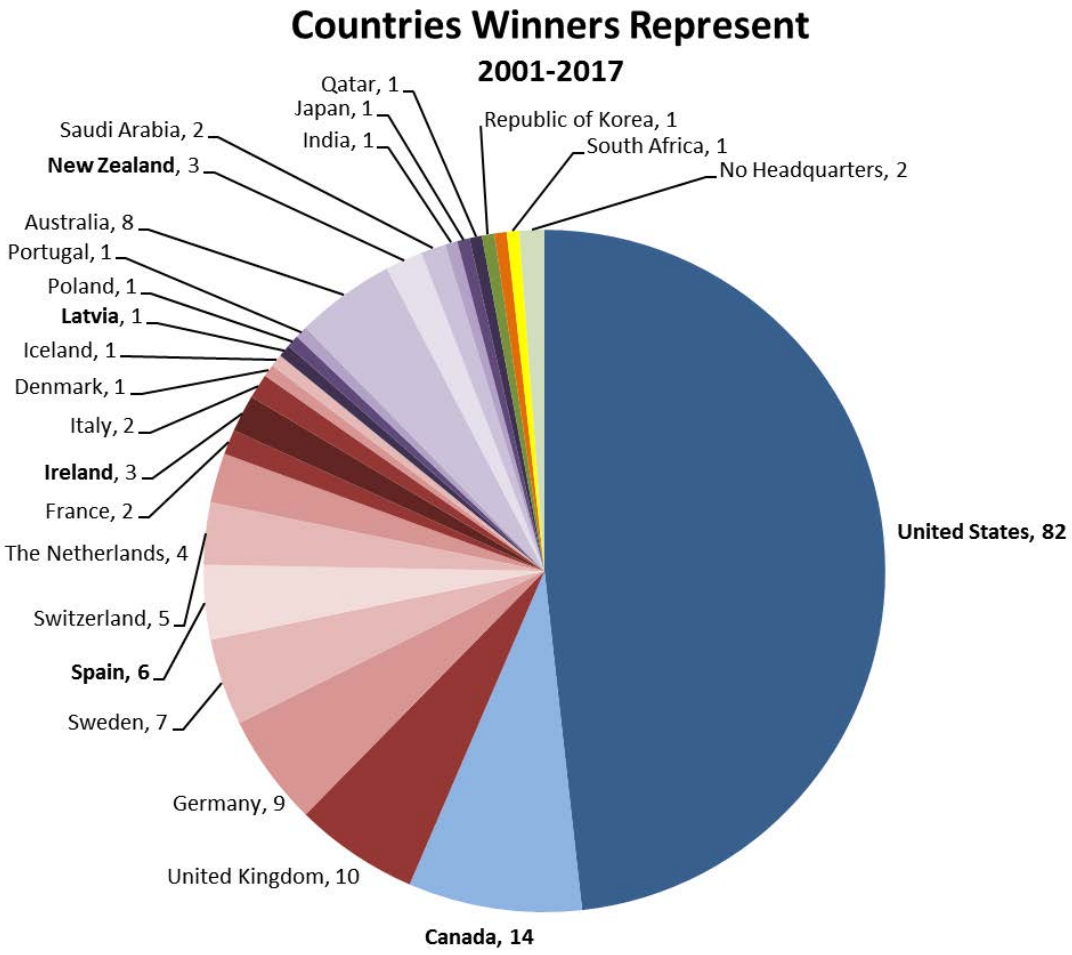
Following are the world regions and their total percentages of winning organizations since we launched the Intranet Design Annual in 2001:

- North America (56%)
- Europe (31%)
- Asia Pacific and the Middle East (10%)
- South America (1%)
- Africa (1%)

Two organizations, representing 1% of all winners over time, claimed to have no headquarters: one was a global network of organizations, and the other considered itself global and not located in any specific country.



Regions Represented by Winners: 2001–2017. The world regions and respective percentages of winners throughout the Design Annual's history are North America at 56% (96 winners), Europe at 31% (53 winners), Asia Pacific and the Middle East at 10% (17 winners), South America at 1% (1 winner), and Africa at 1% (1 winner); 1% (2 winners) claimed no official regional headquarters.



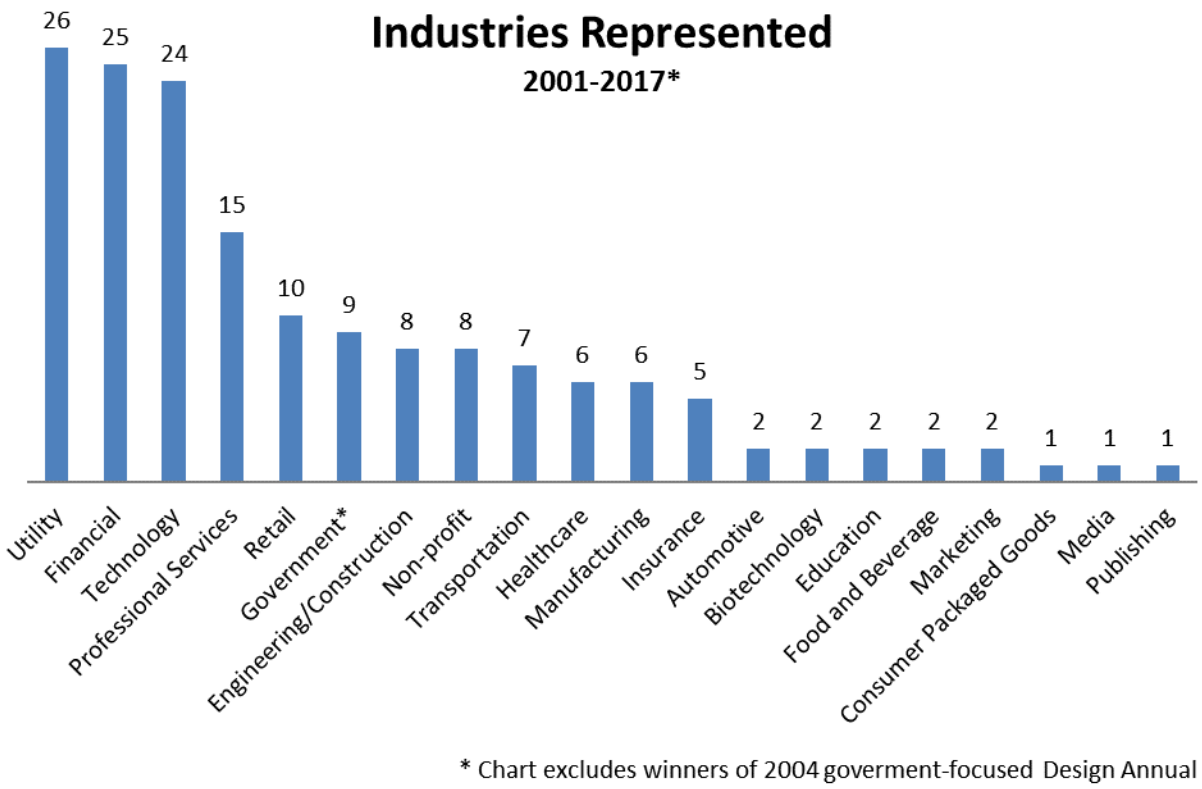
Countries Represented by Winners: 2001–2017. Winning organizations come from 25 different countries. Countries are grouped here by region (moving clockwise from top): North America, Europe, Asia Pacific and the Middle East, and South America. The countries of 2017 winners are shown in bold.

This year's winners represent eight different industries. Utilities retain the top spot as the industry with the most winners, aided this year by Encana's win. Bank of America and Santander keep the financial industry in a close second.

Following are this year's winning industries and the number of winners in each:

- Financial (2)
- Transportation (2)
- Construction (1)
- Food and Beverage (1)
- Nonprofit (1)
- Marketing (1)
- Technology (1)

- Utility (1)



* Chart excludes winners of 2004 goverment-focused Design Annual

Industries Represented: 2001–2017. This year's winners represent eight different industries of the 20 recognized throughout the history of the Design Annual. The industries and their winning counts for 2017 are financial (2), transportation (2), construction (1), food and beverage (1), nonprofit (1), marketing (1), technology (1), and utility (1).

Intranets Not Selected: Common Issues

The intranets in this report might make it look easy to design a great intranet. But it is not easy. Poor design patterns, ill-equipped teams, lack of focus, politics, technology, impossibly short schedules, missing leadership, and a slew of other issues and detractors often and easily foil good intranet design. These negative causes lead to poor effects — in this case, bad intranet design. Following are examples of poor design elements we found among some of the non-winning submissions to this year's contest.

LACK OF PAGE HIERARCHY

Cards and masonry layout are sirens to responsive design. Compartmentalizing page sections into modules makes it easy to flow pages based on the screen size detected. That's all very good. But sections still need something to differentiate their importance. If every section possesses the same visual traits — such as heading size and the size of the section itself — users have no way of telling which part of the page is important. The page can also take on the appearance of a Jackson Pollack painting, with sections seemingly splashed on at random.

MENUS WITH OVERLAPPING CATEGORIES AND TOO MUCH CLUTTER

Defining an IA and creating understandable navigation requires research and time, and often considerable discussion with stakeholders. Without these elements, navigation can get out of control. In some designs this year, menus had far too many commands to be easily scannable. A flat hierarchy can be usable, but it still needs link categories, headings, and subheadings.

OUT-OF-BOX

Some teams do not have the resources — or possibly the expertise — to truly make SharePoint their own. In other cases, the default solutions are enough to meet an organization's goals and needs, at least in the short term. However, an out-of-box experience will not deliver the out-of-body experience that the winning intranets offer.

ILLEGIBLE TEXT

Too-small text, highly stylized typefaces, and poor contrast between the text and background colors still vex intranet designs. Leaning, pinching, squinting, and straining are activities you might engage in at the gym, but are not good when using the intranet.

HAMBURGER MENU ON DESKTOP

Hamburger menus hide commands rather than advertise what's available on an intranet. They are thus unsuited to desktop, where they are both unexpected and hard to see. Designers might choose a hamburger icon instead of displaying navigation links in a phone UI to make room for content on the small screen, but desktop interfaces should show the menu links. You have the space. Use it for this important wayfinding cue and to advertise what the site offers users.

ALL SOCIAL

Social features let everyone share information. But as a content strategy, social can't carry a typical intranet. Intranets that have walls and feeds still need stories and other announcements to keep employees engaged and informed — as well as to ensure a steady stream of varied and important information.

LOPSIDED PAGE CONTENT

Pages must be balanced and easy to scan. On some intranets, many pages were nearly empty, while others were cluttered and long. Of course, every page can't have the same amount of content, but extremely heavy and/or extremely light pages should not be common on a site.

MISALLOCATION OF SCREEN REAL ESTATE

A promotion might be important to the business, but should it dominate the intranet homepage? Some designs section off a huge part of the top of the homepage for promotions pushing all of the more important content down the page.

Selection Criteria and Process

Nielsen Norman Group's Intranet Design Annual rewards great examples of useful, usable intranets that meet the needs of people using them. To find these intranets and their teams, we post a call for entries each year in May on our corporate website, www.nngroup.com.

To enter, organizations — either the design firms responsible for the intranet or the organization's own intranet team — submit background information about the organization and a brief description of the intranet, including its features, functions, and users, and what makes it unique.

We review each entry, then judge and select the winners based on a four-step process:

1. Initial design reviews and numeric rankings
2. Follow-up questions with the top submissions (as necessary)
3. In-depth design reviews on the top entries to choose the top 10
4. Follow-up interviews with the top 10

Each step is detailed below.

INITIAL DESIGN REVIEWS AND NUMERIC RANKINGS

The judges (see the next section, *About the Authors*) conduct baseline design reviews and narrow the field down to tier-one submissions. We rate each site numerically and note any great or missing features and qualities. We base the numeric rankings on criteria typically viewed as key to intranet usability, including criteria that emerge from submissions or trends in previous years. We rate each submission on a scale of 0 to 3, with 3 being the best rating. Criteria include the following:

Navigation

- Main navigation on every page
- Consistent, easy navigation
- Clear hierarchy
- Consistent style across the intranet
- Horizontal scrolling and swiping used appropriately
- Expected page layout and appropriate vertical scrolling

Design

- Pleasing aesthetics, clean design
- Page hierarchy and priority
- Brand support (without over-branding)
- Engaging and helpful homepage design

- Good contrast between text and background
- Good use of graphics
- Legible text
- Distinguishable headings and links
- The right amount of text and links

Search

- Consistently available search
- Employee directory or directory search
- Clear relationship between site and employee search
- Good search design (ideally, a simple open field at the top of pages on desktop and tablet, and a magnifying glass on phones)

Personalization and News Delivery:

- Personalization and roles, catering to different offices or cultures
- Organization-related news
- Information about internal groups

Content:

- Well-written text
- Appropriate, engaging tone of voice
- Content management, content curation, and editorial team management
- Information that meets business needs

Collaboration and Social:

- Content posting and editing capabilities for all employees
- Rating, commenting on, and sharing content

Overall:

- Simple forms
- Support for the main corporate functions
- Encapsulation of the organization's spirit
- Use of innovative, fun, or original features
- Accessible to all users
- Useful mobile offerings
- Originality or "something special"
- Challenges faced compared with output achieved

About the Authors

Kara Pernice is Senior Vice President at Nielsen Norman Group and works with clients to derive UX strategy and designs that meet business goals. With more than 20 years of experience in management and user experience (UX) research and design, she has led many major intercontinental research studies, authored a variety of research reports and hundreds of guidelines, and coauthored the book *Eyetracking Web Usability*. *The Wall Street Journal* called Pernice an "intranet guru." She has lectured around the world on a wide range of topics, and her client work spans many businesses and industries. Before joining NN/g, Pernice gained invaluable experience pioneering UX and building and managing UX teams in an assortment of development environments and established several successful UX programs. A champion for usability, Pernice chaired the Usability Professionals' Association 2000 and 2001 conferences, and served as 2002 conference advisor. She holds an MBA from Northeastern University and a BA from Simmons College.

Amy Schade is a Director at Nielsen Norman Group with more than 20 years of experience in usability, user research, and website design and development. She leads research, authors reports, and teaches courses on the usability of intranets, mobile websites and applications, responsive design, emerging design patterns, and ecommerce. She has co-authored the Intranet Design Annual since 2010. She also runs Nielsen Norman Group's Online Seminar program.

Schade works with clients large and small in industries including telecommunications, ecommerce, nonprofits, government, education, and publishing, including extensive work on corporate intranets. She has conducted worldwide user research — including longitudinal studies, remote studies, accessibility studies, and eyetracking research — 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.

Acknowledgements

Thank you to the designers and organizations associated with the 10 intranets in this report. We appreciate them for submitting their work, cooperating in interviews, reviewing the report, and mostly for their exceptional intranet designs.

A special thank you to all of the organizations who entered their intranets for consideration.

Thanks to Jeanette Pidanick for her assistance throughout the review process, to Susan Pernice for helping us refine that process, and to Keri Schreiner for editing this report.

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Have a great intranet? Large or small, you could win next year's Intranet Design Annual competition.

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Eligible designs include anything currently running inside a company that is not accessible on the public web, including:

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