Intranet Design Annual 2019

The Year's 10 Best Intranets

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Executive Summary

ORGANIZATIONS

Following are the organizations with the 10 best-designed intranets for 2019:

- **3M** (US), a global science company
- **Anthem, Inc.,** (US), one of the leading health benefits companies in the US
- **BHP Billiton Limited** (Australia), a leading global resources company
- **Duke Energy** (US), one of the largest electric power holding companies in the US, supplying and delivering electricity to approximately 7.4 million US customers
- **European Bank for Reconstruction and Development (EBRD)** (UK), an international, multilateral development bank that provides financial instruments and advisory services that strengthen economies on three continents
- **Flight Centre Travel Group** (Australia), the world's largest independent travel company, specializing in vacations, tours, and corporate travel
- **The International Business Machines Corporation (IBM)** (US), an American multinational technology company
- **Lamprell Energy Limited** (United Arab Emirates), a leading provider of fabrication, engineering, and contracting services to the offshore and onshore oil & gas and renewable energy industries
- **Messer Construction Co.** (US), an employee-owned commercial construction company
- **Norwegian Government Security and Service Organization** (Norway), a shared services organization within the central government of Norway

THE UNITED STATES CONTINUES TO SUPPLY THE MOST WINNERS

Of the 10 winning teams, five hail from the US. For the first time in years, Canada has no winners this year. Of the remaining five winners, Australia has two, and Dubai, Norway, and the UK each have one.

UTILITIES AND GOVERNMENT HAVE THE STRONGEST SHOWING

We broaden the definition of "utilities" to include mining and other natural resources; given that, utilities remain the most winning industry, with 31 winners (17%) since the start of this contest. This year, three utilities companies are among the winners.

Two government agencies—the Norwegian Government Security and Service Organization and EBRD—are among this year's winners. (EBRD also qualifies as a financial institution.)

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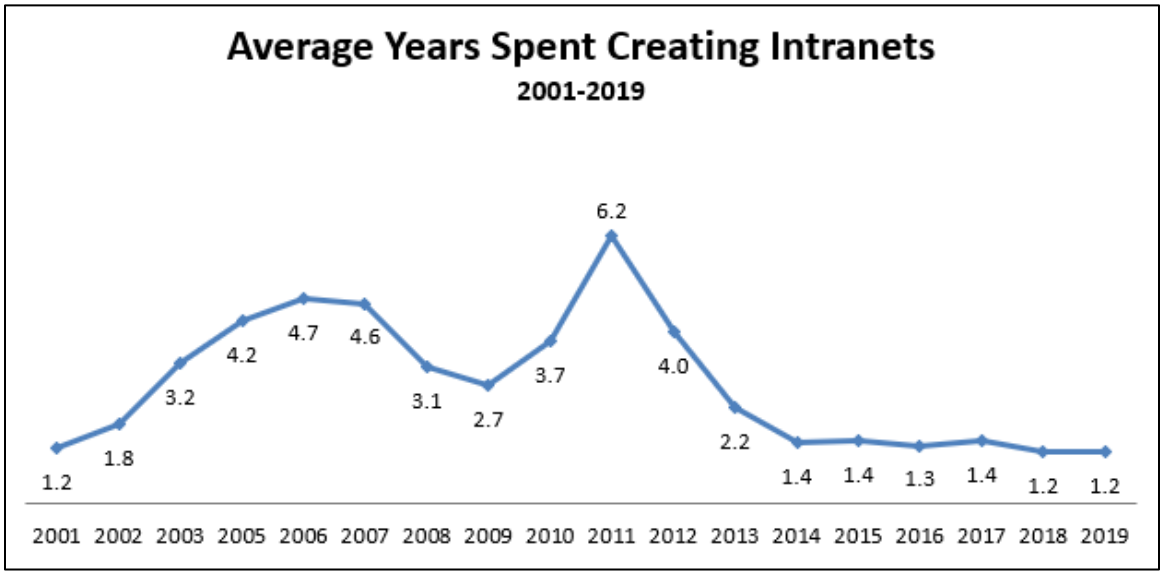
Technology and finance continue to be strongly represented industries, and each has one winner this year. While certainly good, the representation of tech and finance is less than we saw in the first decade of this award and indicates that a broader range of industries are now taking intranet design and user experience (UX) seriously.

RAPID INTRANET DEVELOPMENT

From 2001 to the present, the overall average development time is 33.1 months (2.8 years). But the more interesting story is the consistent and significant drop in this average starting in 2014. From 2001 to 2013, the average was 23.5 months (2.0 years), while the average from 2014 forward was just 15.9 months (1.3 years). Last year, the average winning intranets' development time dropped even further, to 14 months (1.2 years), and it held at 14 months again this year.

The approach that teams take to an intranet "redesign" has also changed. Today's redesign may include restructuring the IA, auditing content, revamping search, and changing the look and feel. However, Agile development has removed the sense of *finality* of a released design. Teams still plan major components, but they deliver them in waves, often after the big redesign goes live. Thus, the great intranets are always improving. In consequence, the redesign time measured doesn't include all of the intranet design work. It simply can't, because redesign is an ongoing project.

Further, good intranet-creation tools can expedite development. For example, two of this year's winners used intranet solutions that let them go live in just seven and nine months, respectively.

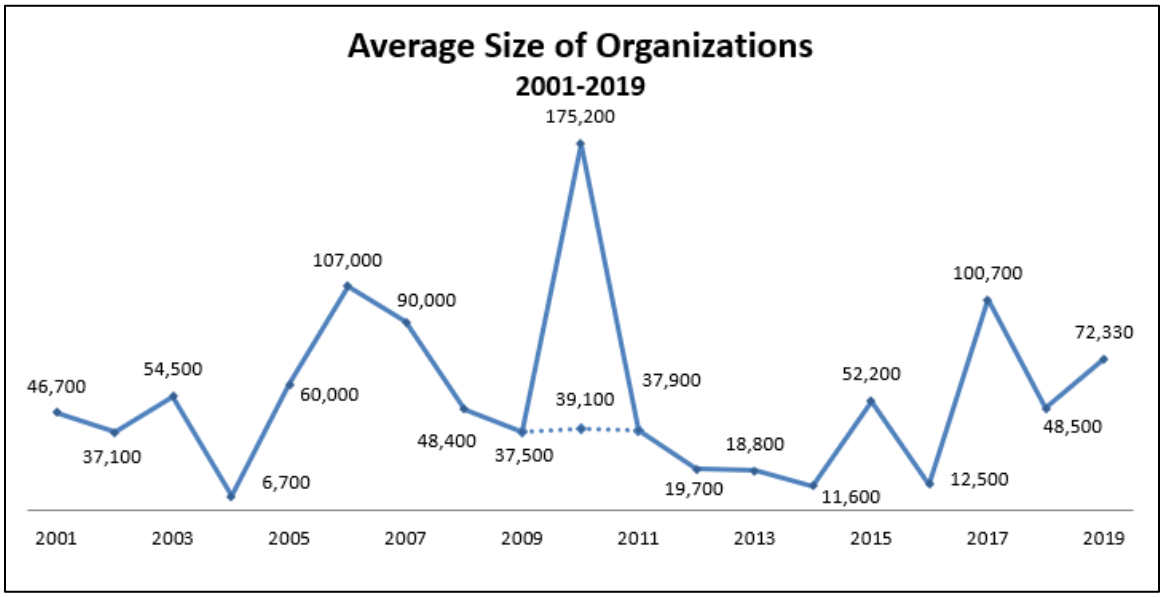


Average Years Spent Creating Intranets: 2001–2019. Teams created this year's winning sites in an average of 14 months (1.2 years). This development time continues the trend that started in 2014, when creating the winning intranets began taking less than 1.5 years on average. In contrast, from 2001 to 2013, winning intranet teams took an average of 23.5 months (2.0 years) to complete their redesigns.

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ORGANIZATION SIZE

The median company size of this year's winners was 33,000 employees. On average, winning organizations had 72,330 employees, ranging from 1,200 employees at Messer Construction Co. to 380,000 at IBM.



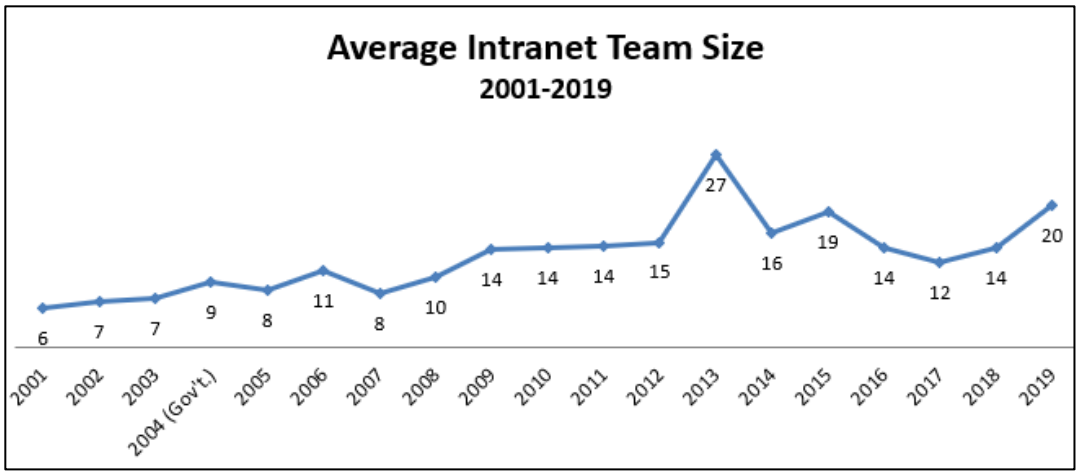
Average Organization Size: 2001–2019. The winning 2018 intranets come from organizations with an average of 72,330 employees. This year's median was 33,000 employees. (The high average in 2010 was due to winning organization Walmart's size, with an intranet supporting 1.4 million store associates. Excluding Walmart, the average for that year was 39,100.)

LARGER CORE TEAMS

This year's average team size for the winning intranets was 20 members—the second largest we have seen. Team sizes ranged from as few as two members at Flight Centre Travel Group to as many as 50 at IBM. Four teams—Anthem, Inc., BHP Billiton Limited, Duke Energy, and IBM—were larger than the average size of last year's winners (14 team members).

These numbers reflect the core intranet teams, as opposed to extended teams, which might include content authors or short-term project members. Core teams comprised internal and external staff and full- and part-time employees.

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Average Intranet Team Size: 2001–2019. In 2019, the average team size was 20 members; this is the largest average we have seen since 2013, when the average was 27 members.

It's encouraging to see an increase in the average core-team size for the winning intranets. For too long, intranet teams have been making do with limited human resources. Creating and maintaining an intranet—no matter how much you automate and build good workflows—is still a manual job in many ways. Including individuals from across the organization always requires deep research, handholding, and political maneuvering.

Further, our team numbers here reflect the number of employees working on the *intranet redesign*; often, even fewer employees remain dedicated to intranet maintenance, governance, and iterative development after the major redesign effort is complete. Given the intranet's importance—both for communicating internally and completing daily work—intranet teams should be even more generously staffed.

INTRANET TEAM SIZE RELATIVE TO NUMBER OF EMPLOYEES

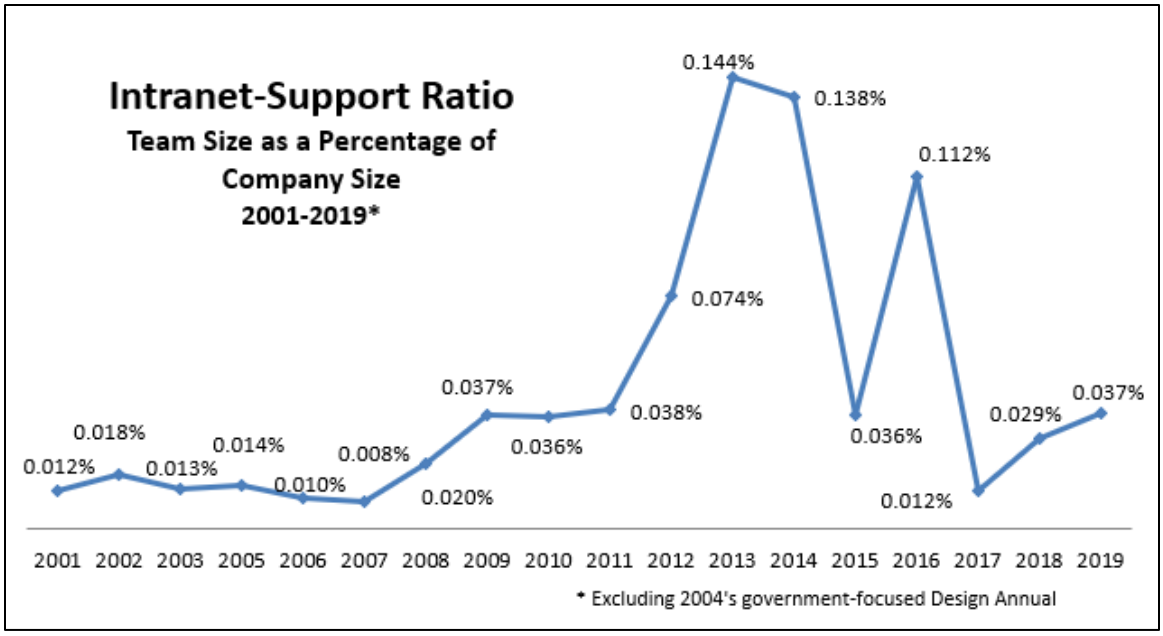
The median company size of this year's winners was 33,000 employees. On average, winning organizations had 72,330 employees, ranging from 1,200 employees at Messer Construction Co. to 380,000 at IBM.[1]

For the winning designs, we also consider team size relative to organization size. Intranet teams are special in that a small number of people can have a huge impact on many people at the organization. For example, the 3M team had 12 people supporting 121,000 users.

As a percentage, this year's teams comprised 0.037% of company size. That is, for every 10,000 employees, 3.7 worked on the intranet team.

[1] In these counts, we considered the number of employees at the organization, not the number of people the application supports. Most Design Annual winners are intranets that are meant to support the whole organization. However, while IBM has 380,000 employees, only 125,000 are supported by the Bluemine application, and Messer Construction Co. has 1,200 employees, but only approximately 800 have an O365 account and can regularly access the intranet.

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Team Size as a Percentage of Company Size: 2001–2019. This year's winning intranet teams comprised 0.037% of the entire organization.

To further explore the relationship between organization and team sizes, we compared team size to company size over the past 10 Intranet Design Annuals. We found that our winning intranets have a similar *intranet support ratio*, or percentage of employees that work on the intranet team.

The rather complex formula below summarizes the relationship between team size and organization size for winning Intranet Design Annual teams. The intranet support ratio formula is:

$$\textit{Intranet support ratio} = 6.689 * \textit{number of employees}^{-0.926}$$

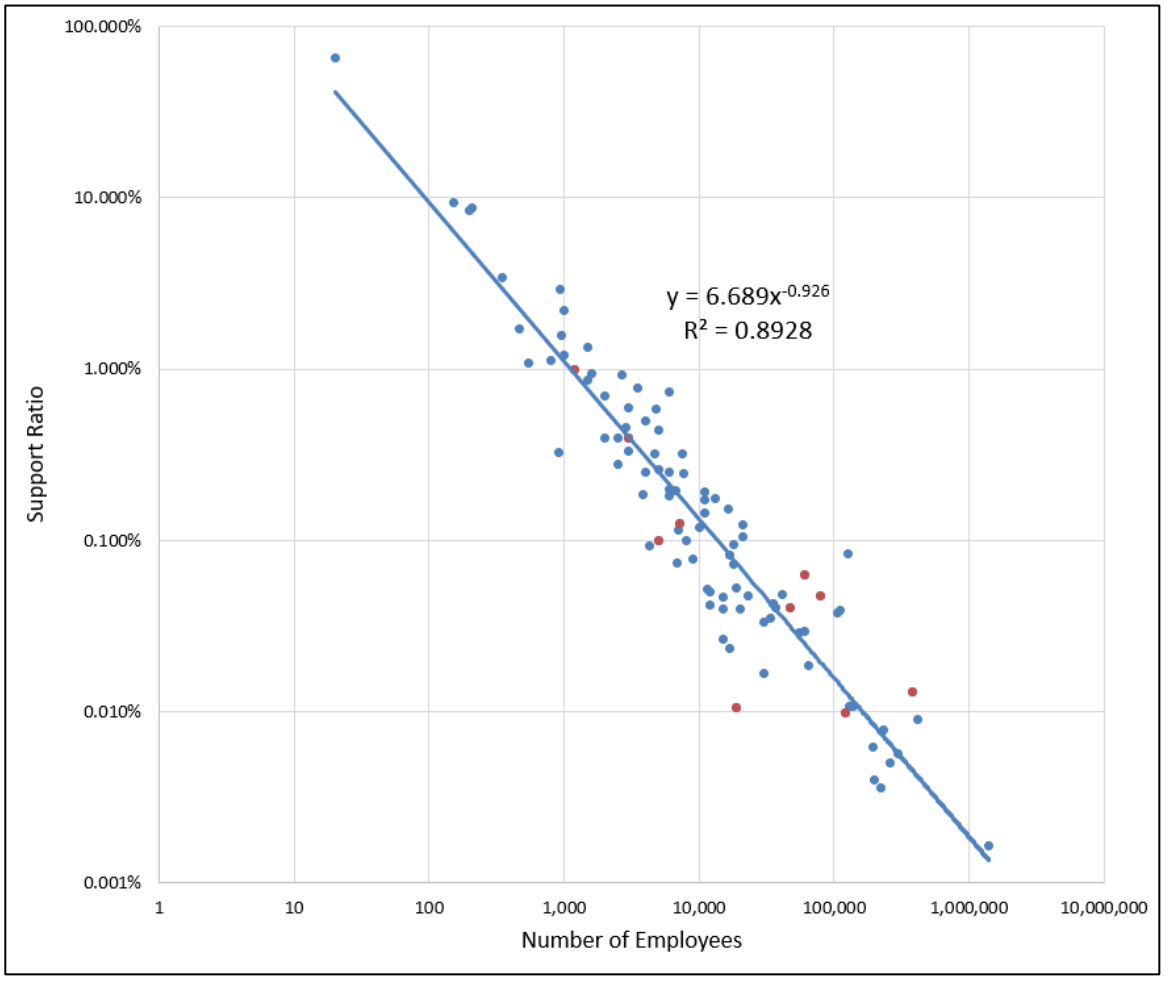
That is, you take the number of employees the intranet supports and raise it to the power of -0.926. You then multiply the resulting number by 6.689 to get the expected intranet support ratio. This ratio, multiplied by the number of employees, results in a team size. (The equation explains 89% of the variability in intranet support ratios.)

As complex at this equation is, in practice, it breaks down simply to team sizes of 8–10 people as follows:

Number of employees at winning organizations	Size of winning intranet teams
100	7.5
1,000	8.0
10,000	8.5

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100,000	9.0
500,000	9.4



Intranet Support Ratio: 2010–2019. The *intranet support ratio* equation explains 89% of the variability in intranet support ratios. This effect is visible in the chart, which plots the numbers on a double logarithmic scale.

These numbers are likely so small because the teams enlisted agency support. Regardless, we do not recommend having only 7–10 people on intranet teams. In fact, teams should have many more people; this year's winners, for example, had 20 team members on average. Teams may need many more (or, in rare cases, fewer) people, depending on the circumstances. These numbers are simply a suggested minimum team size.

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BRINGING IN OUTSIDE HELP

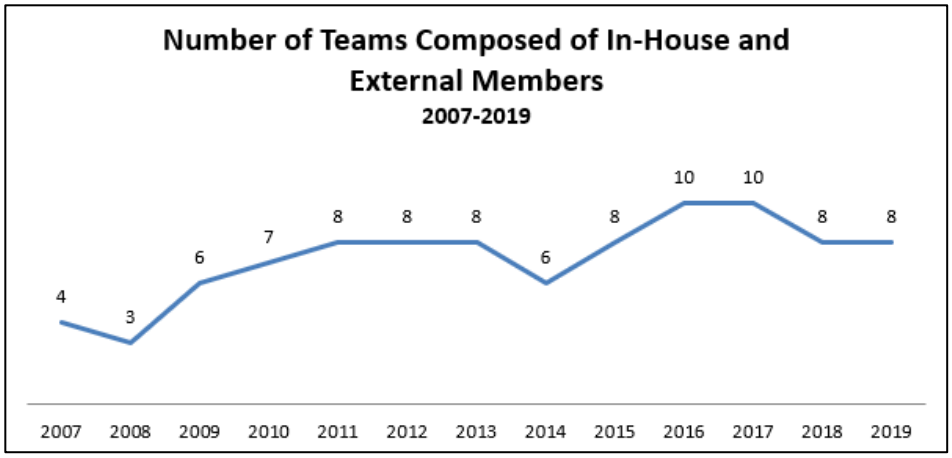
Eight of this year's winning organizations looked to outside agencies and consultants to help with their intranet redesign, bringing in an average of two agencies each.

Key areas that teams sought help for included:

- Content creation and editor training
- Development
- Discovery
- Ideation
- Information architecture
- Persona creation
- Journey map creation
- Project management
- Prototyping
- User research
- Visual design
- Wireframes

Over the years, many winning intranet teams have engaged external resources to help in their redesign projects, both to fill internal team gaps and gain outside experience and perspective.

Reliance on outside resources is a double-edged sword, however. Many winning organizations have quick development times and iterative practices, which raises a crucial question: *When these short-term external resources leave, who is left to iterate, maintain, and continually improve the new site?*



Number of Teams Composed of In-House and External Members: 2007–2019. This year, 8 of 10 winning organizations used outside resources in their intranet-redesign projects.

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

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Overview of the Winners

THE 10 WINNERS *IN ALPHABETICAL ORDER*	
3M (Manufacturing; US)	It should be no surprise that a company with such a rich history of innovation, including the creation of the original Post-It Note, could also conquer the challenge of creating a truly global intranet. The 3M case study humbly reminds us that even a complicated organization can deftly design an attractive and easy-to-use intranet that entices its users to keep coming back for more.
Anthem, Inc. (Health Insurance; US)	A remarkable HR section, an "access to everything" dashboard, hearty employee profiles, and a comprehensive homepage help Anthem employees be highly productive and feel in control. Experiencing the peaceful visual color palette in the design is just one more benefit of using Pulse.
BHP Billiton Limited (Global Resources/Mining; AUS)	The BHP intranet offers impressive search features, strong support for collaboration across time zones, and rich news and applications. These features and many more help BHP employees rise to any occasion and shine.
Duke Energy (Utility/Energy; US)	Thoughtful web parts and a thorough guide to their use are just two of the above-and-beyond elements that make The Portal a consistent, brand-supporting, and easy-to-use site. This portal does far more than simply promise links to content: It exceeds expectations and quickly and concisely delivers more information than users typically expect.
European Bank for Reconstruction (EBRD) (Financial; UK)	The themes of this redesign are *freedom* and *flexibility*. Stepping as far away as possible from the previous intranet's design (which was old and rigid), the new EBRD intranet allows users to customize the homepage and apps list (among other things) and lets all employees write and be responsible for the intranet's highly diverse content.
Flight Centre Travel Group (Travel/Tourism; AUS)	Content accuracy and assembling everything employees need in one place are features emphasized in this pleasing design. PILOT pulls together a wealth of information, tools, and applications in a way that lifts Flight Centre employees to their full productivity potential.
The International Business Machines Corporation (IBM) (Technology; US)	The subtle, terse-texted, nearly graphic-free design of IBM's Bluemine platform happily takes the backseat to the far more important market-intelligence reports, which are the site's true focus. A robust search, a select few pieces of promoted content, a customizable bookmarks page, and extensive help tools make it possible to find an entire world of priceless competitive research in just moments.
Lamprell Energy Limited (Energy; United Arab Emirates)	*Set goals, measure, and be transparent about it*. These are the qualities of great businesses that students learn about in business school—and exactly the kind of information that

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	LamprellConnect shares. Key charts and statistics support employees and teams in understanding what they should be doing, how they are doing, and whether they need to recalibrate.
Messer Construction Co. (Construction; US)	This site caters meticulously to its two general user types: the business and the skilled trade. MyMesser is rich with features and content; its most compelling areas include safety information, jobsite checklists and cameras, department and regional sections, news, and thorough process flows.
Norwegian Government Security and Service Organization (DSS) (Government; Norway)	What a pleasure to experience the outstanding and innovative personalization and search functions ministering to ministry employees. The common design platform across multiple government intranets and the content-sharing feature are other notable elements that inspired us to vote a resounding “ja!” for this design.

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COMPANIES AT A GLANCE				
Company	**Headquarters**	**Industry**	**# of Employees**	**Intranet Team Size**
3M	US	Manufacturing	91,000 employees and 30,000 contractors	3M project team (design and build): 12 3M run-state (post go-live): 8
Anthem, Inc.	US	Health Insurance	58,000 associates and 22,000 contractors	38 (24 internal/14 external)
BHP	Australia	Global Resources/Mining	More than 62,000 employees and contractors	38 (internal/external)
Duke Energy	US	Energy	47,000, including 17,000 contingent workers or contractors with intranet access	20 (10 internal/ 10 external)
European Bank for Reconstruction (EBRD)	UK	Government	3,500	Prior to project: 1 During project: core staff varied from 12–20 at different stages, but averaged closer to 12
Flight Centre Travel Group	Australia	Travel & Tourism	19,000	2 (internal)
IBM	US	Technology	380,000 total, of whom 125,000 use the Bluemine intranet application	50 (internal)
Lamprell Energy Limited	United Arab Emirates	Energy	5,000+	5 (internal)
Messer Construction Co.	US	Construction	1,200 total, of whom approximately 800 regularly use the intranet; the rest of the company's employees do not have an Office 365 (O365) account, but can sign in at a shared workstation	12 (internal/ external)
Norwegian Government Security and Service	Norway	Government	750 employees who serve 7,100 employees in	During primary development: 9 internal and 10–12

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Organization			Norway's central government and ministries	consultants, plus 12 ministry intranet editors and editorial team members

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INTRANETS AT A GLANCE				
Company	**Intranet Platform**	**Language(s)**	**Mobile Approach**	**Agile Development**
3M	SharePoint Online	15 primary languages, with more options available for content owners to use any languages that O365 supports	Responsive web design	Yes (for second half of build and ongoing run-state)
Anthem, Inc.	Oracle WebCenter Suite 12c	English	Responsive web design	Yes
BHP	SharePoint Online	English and Spanish	Responsive web design and a mobile app (in development)	Yes
Duke Energy	SharePoint Online (O365)	English	Responsive web design	Yes
European Bank for Reconstruction (EBRD)	Oracle WebCenter Sites	English	Responsive web design	Yes
Flight Centre Travel Group	Unily	Auto translation and 1:1 translation	Responsive web design and dedicated iOS and Android app	Yes
IBM	Bluemine	English and Japanese (for some reports and tools)	Responsive web design	Yes
Lamprell Energy Limited	IIS, ASP.Net	English	Responsive web design	Yes
Messer Construction Co.	SharePoint Online (O365)	English	Responsive web design	Yes
Norwegian Government Security and Service Organization (DSS)	A custom implementation of EPiserver CMS 11, along with SharePoint 2013 for search and collaboration	Norwegian, English	Responsive web design	Yes (monthly releases of new functions)

Common Themes Among the Winners

HUB OF THE DIGITAL WORKPLACE

For many years, intranets have struggled to find and take their rightful place in today's *digital workplace*—that is, the collection of digital tools accessible to employees. Small steps from previous years, such as acting as a "portal" and including links to a few commonly used tools, have now given way to more robust ways of organizing, linking, summarizing content, and exposing tool features that employees need.

At almost any organization, the number of applications available to employees can be countless; knowing when to use which tool, mystifying; and how to find the right tool, seemingly impossible. But today's intranets are very good at finding the applications that employees need and making them readily available. Intranet teams take inventories of tools and applications, and then determine which are necessary and popular. Intranets can house and serve tools in many ways, including to:

- Include them in the overall site search.
- Present them in a list of popular tools.
- Serve them to individual employees based on their roles.
- Let employees save links to their favorite tools.
- Store links to and descriptions of all tools in their own intranet area.

These effective techniques are implemented in various creative ways on this year's winning intranets.

LAUNCH AND RELAUNCH

Imagine that your organization is saddled with an unhelpful intranet that employees either ignore or use for at most a few features. Now imagine that a new, great, helpful intranet will be replacing the old one. How do you change an employee's mindset to give the new design a chance? One way is through launch efforts and continued education.

This year's winners tapped into their public relations savvy to get their new designs noticed—and used.

IBM created short video vignettes describing the redesign to communicate how the Bluemine design had changed. Duke Energy looked backward to go forward; its team spent weeks before launch moving every news story from the previous six months to the new template and made all of the stories searchable. 3M implemented a monthly email newsletter and weekly tip card about the 3M Go intranet.

RESEARCH

Involving stakeholders is the mainstay of an intranet design project. But even with schedules closing in, the best intranet teams involved not just stakeholders who spoke for their users, but also the users themselves. This year's winners conducted behavioral research—such as usability tests and field studies—as well as attitudinal research, which included interviews, focus groups, and surveys, with the employees

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who use the intranet. Early in the design process, teams made great efforts to understand how employees work and what they need.

Over the course of its project, the 3M team conducted exhaustive user research with more than 4,500 employees. Messer Construction Co. paid close attention and chose the most impactful research methods to meet various needs. For example, the team used discovery interviews in the beginning and, when the IA was about to take shape, it turned to card sorting. Further, throughout the project, the team employed user personas to anchor its design decisions.

KEEPING CONTENT CURRENT

Ensuring that content is current is the bane of many an intranet editor. A workflow-enabled CMS with content expiration and replacement can help greatly, as can including the name and contact information of each page's owner. This year, the winners advanced the quest for current content in thought-provoking ways.

At Flight Centre, a mini-form enables any employee to provide feedback about page content, while a monthly content audit with key content managers goes a long way toward ensuring that content stays fresh. 3M entices employees to update their employee profiles by offering a simple editing process; it also provides a progress chart to show profile completeness. In addition, the site's form to submit news is so straightforward that it requires no training whatsoever.

PERSONALIZATION AND CUSTOMIZATION

Personalization (pushing content and features to employees based on their roles) and customization (allowing users to make content and features they want easily accessible) remain highly valuable ways to increase intranet communication and productivity. Personalization and customization features prevent employees from being inundated with information or lost in a quagmire of links and menus.

Lamprell presents content based on the logged-in user's role. Anthem's intranet incorporates personalization and customization in several areas, including news, applications, and a helpful dashboard. Duke Energy personalizes links to eliminate clutter. EBRD tracks the content that employees create, as well as their selected apps, Twitter handles, bookmarks, and various other personalized information.

For years, the lines between personalization and customization have been blurring. About 10 years ago, winning companies began letting their users switch roles to see different intranet content. We saw this type of flexibility again this year. 3M's intranet offers something that falls between traditional personalization and customization: it targets content to employees based on preferences that they select, and they can change those preferences at any time.

DOMAIN KNOWLEDGE SUPPORT

Great intranets continue to support the most basic administrative features, such as how to report a dysfunctional printer or find out what type of paid time-off the organization offers. Designing these types of features as simple intranet tasks helps an organization run smoothly, but great intranets go further. They support the deep, specialized expertise that comprises the organization.

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At Flight Centre, the intranet tracks and communicates events that could cause—or have already caused—travel interruptions, so employees can immediately assist customers. It also offers a killer app that provides information on the employee perk of special travel discounts.

At Lamprell, workplace safety is a core company value. The intranet shares charts of safety statistics based on employee role. These charts help employees monitor their achievements and strive to further improve. A special page for managers lets them perform most of their day-to-day activities in just a few clicks.

Messer Construction Co. offers its skilled trade workers checklists and resources to ameliorate their work in the field. An intranet section consolidates much of what they need in one place and is usable on mobile devices.

Anthem, a health insurance company, offers a comprehensive HR section on its intranet. The section provides personalized benefits information, performance growth information, and other educational content that demonstrates the organization's high investment in its employees.

INFRASTRUCTURE FOR DESIGN

As an intranet grows and the list of features bloats, the design can quickly become unmanageable for the team and unusable for employees. Lacking a plan for contributors to follow, an intranet's IA, menus, search, page hierarchy, and overall content hierarchy can break. Winning intranet teams avoid these issues in several ways:

- Create a design system with style guides, pattern libraries, and component libraries
- Offer only a small set of page templates
- Assist and train content contributors and intranet section owners

This year's winners did these things and more. For example, Duke Energy defined content types and then created 30 web parts that help all designers stay true to the company branding and be consistent in their user interface (UI) designs. The team also created a combination UI style guide and pattern library.

Similarly, EBRD investigated and iterated design templates for intranet sections; this liberated the intranet designers and employees so they could focus on content.

The Norwegian Government Security and Service Organization's common design system was thoroughly usability tested. With this system, designers can reuse visual design, interaction design, and technical components. The consistent design that results creates consistent UIs and time savings for both users and intranet teams.

CATERING TO EMPLOYEES AROUND THE WORLD

On winning intranets, employees from all locations—regardless of their distance from headquarters—feel that the intranet was created with them in mind, to help them do their work and stay informed.

BHP caters to employees around the world with collaboration tools and team capabilities. A clock feature helps employees compare times zones and see if the local time represents working hours in six other important BHP locations. News is

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also translated to the employee's local language. 3M supports more than 15 languages and allows employees to explore and search for all news from all countries in all languages. The Norwegian Government Security and Service Organization also supports multiple languages and lets users switch languages.

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Feature Trends

Today's winning intranets act as modern centers of the digital workplace. Within their larger infrastructures, many small features and details make these great intranets what they are today. To enhance your own intranet, consider adopting some of the following trend-worthy features.

TOOLS AND APPLICATIONS

Do I link to the application? Do I ignore it? Do I expose some of its features and content on the intranet itself? These are only some of the questions that great intranet designers ask and answer as they determine how to best work with tools and apps.

Some organizations focus on bringing app content out into the open on the intranet. For example, Lamprell created a platform that provides a single UI to consolidate much of the data and the most frequently used modules from many different applications. Linking between applications and back-end systems lets employees see real-time data on the intranet, and they can always get more details by clicking links to the full applications.

Findability and quick access to tools are other factors that winning designers focus on. For example, the BHP intranet offers multiple features—including the *App Finder* and *My Work*—that make it possible for users to find the right app at the right time. EBRD offers a page that lists many applications and lets users choose their six favorite application links to post on the homepage. On the Flight Centre intranet, employees have a targeted homepage with a list that offers access to their key business tools and applications, and an application search feature that helps them find apps that are not in their list.

Ever-presence of tools is another theme this year. For example, a toolbar with custom favorites and tools appears on every page of the 3M intranet. Likewise, every page on the Norwegian Government Security and Service Organization's intranet offers a waffle menu that leads to essential applications; each page also offers links and customizable bookmarks to popular pages and tools. Anthem's dashboard includes icons that link to key apps—some of which are personalized to the user, such as a corporate calendar—as well as to the user's customized apps list and favorites. This always-available dashboard appears near the site's global navigation.

Intranets and applications have been harmoniously joined, and we love this love story.

BOOKMARKING PAGES AND APPLICATIONS

The ability to bookmark intranet pages has been an important feature for many years. Bookmarks travel with employees, no matter where they go, which is invaluable—especially for people who share workstations and kiosks. Bookmarks make it abundantly easy for employees to find pages they use frequently. They also provide the added help needed to access pages that might otherwise be tricky to locate in a complex IA or a subpar search.

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At BHP, bookmarking features help employees locate key pages. The site also offers a search innovation: the search tool shows—at the top—how many of the user's favorites appear in the search results.

IBM lets employees customize their bookmarks page and sign up for email digests that summarize recent reports about topics of their choosing. The Norwegian Government Security and Service Organization offers some bookmarks by default and some that are customized by users.

NUMERIC DATA AT EMPLOYEES' FINGERTIPS

Big data has arrived on intranets this year, giving employees access to statistics and other meaningful numbers. Lamprell leads the charge with important key performance indicators (KPIs) on the homepage and dashboards. Employees can see how their own KPIs align with those of their department and the company. Several statistics—related to safety, finance, people, supply chain, and other KPIs—both inform and motivate employees.

FLAT IS OUT; INDIVIDUAL VISUAL DESIGN IS IN

Usable, useful, and beautiful describe this year's winning designs. Flat is gone (thank you!) replaced by Flat 2.0. Even the very minimalist visual designs include subtle but noticeable signifiers to indicate that a link is clickable and that a button is a button.

Text that is legible, yet calm and pleasing to the eye—such as the text on 3M's intranet—provides an unassuming visual look. Duke Energy's subtle colors and shading make pages a pleasure to scan and consume. EBRD's color palette makes pages look good and also helps create visual hierarchy. IBM uses images sparingly to reinforce messages. Anthem juxtaposes a comforting color palette with punches of orange to make buttons and other elements visible.

FILTERS AND FACETS TO REFINE

A previously uncommon, advanced feature—filters and facets—is now standard in great intranets. Using keywords to filter page content and search results gives employees practically unlimited control over the content they see. Winning teams employ these filters in many ways, not just in site search. For example, Flight Centre's employee search takes advantage of exhaustive metadata and offers various filtering and sorting options.

SEARCH ADVANCEMENTS

Predictive search and the ability to filter and sort results are just a few of the search features that help employees find what they need on this year's winning intranets.

It's helpful when search crawls as much information as possible. For example, Lamprell's intranet searches policies and documents even if they are stored in various applications. EBRD's intranet search includes all intranet content—including content contained in collaborative spaces—and the search results display as the user types, making search fast and easy.

The Norwegian Government Security and Service Organization offers a common global search that crawls multiple intranets, an extranet, and SharePoint resources,

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and returns results regardless of the source. Search is also targeted to the logged-in user.

Site search makes it possible for employees to find anything. On the BHP intranet, however, select places have their own scoped search. This makes search more accurate, and also makes it easier to deal with the results.

IBM's Bluemine is the company's market intelligence intranet. Given such a deep repository of data, sorting and filters are essential, and the search offers thorough, yet uncumbersome refining features. Further, metadata for each report is carefully documented, described, and tagged to maintain both repository health and search success.

EMPLOYEE PROFILES AND EMPLOYEE SEARCH

Employee search is the most-used feature on intranets. Key needs include finding a phone number, email address, or office location. The rich content in today's employee profiles helps employees get to know one another and work together more effectively.

Anthem's robust people finder supports search with simple criteria or an elaborate query. The rich employee profiles house a large amount of information about each employee and include employee bookmarks and selected apps.

BHP's comprehensive employee profiles include experience, skills, and teams. At Lamprell, employees can access their own information about time off and more.

Flight Centre's employee profiles offer a wide variety of information about the employee, plus articles, documents, and people the employee has engaged with.

ORGANIZATION CHARTS

Organization charts and their availability through employee profiles are not a new concept, but many intranets had stopped offering them. But now, more than ever, employees want to know how they and their colleagues fit within the organization, so org charts are back this year. Displaying teams, hierarchy, and individuals in organization charts is once again a prevalent feature on intranets. Employees who work remotely and across teams usually take special notice of these org charts.

INFORMATION ABOUT TEAMS

Employees may know little or nothing about teams they never work with, particularly if they work at large organizations. Providing information about the work of different groups can give employees a broader picture of their organization as a whole. It can also help employees work together or change jobs more effectively.

EBRD's intranet includes sections for departments, regional offices, and countries that communicate what each unit does and how its staff members can help coworkers, as well as offering key contacts and more.

Flight Centre's brand pages help track the company's 40 travel brands. Each brand describes what it does and provides key facts and KPIs, contacts, and events, along with links to websites and documents for further reading.

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Messer Construction Co.'s project information includes descriptions of construction projects and teams, along with photos and live video feeds.

COMMUNITIES AND TEAM SPACES

Communities, forums, team spaces… regardless of what they are called, they all have a similar goal: to offer employees ways to collaborate on a focused topic or project.

Anthem communities include an overview, resources, events, and blogs. EBRD's mini-collaboration tools, *Spaces,* are easy for any employee to set up and share, and are easy to find via site search. Lamprell's team information keeps employees abreast of team tasks and coworkers' out-of-office time; it also provides the opportunity for people to share ideas and make comments.

UBIQUITOUS RESPONSIVE DESIGN

This year, teams reported far less pushback on providing mobile intranet access than they had in years past. Most of this year's winners have responsive or nearly responsive intranets.

Lamprell's intranet is accessible from any device. Messer Construction Co.'s intranet is responsive, and more than 75% of users access the site on a smart phone or tablet.

Although only about 1% of Bluemine usage is mobile, IBM created a fully responsive site to accommodate all users' needs. Likewise, while Duke Energy determined that most employees will not primarily access the intranet via mobile, the team created a fully responsive site to meet the expected future demands.

NEWS

Employees look to the intranet to get information from executives and about the organization.

Messer Construction Co.'s news, videos from leaders, and project information all keep employees informed, interested, and invested. The BHP intranet offers robust news, with no fewer than seven types of media to keep employees in the know. Duke Energy's news articles are shared internally and sometimes publicly.

At EBRD, any employee can write news; this generates more news, includes more employees, and takes the stress of populating all of the intranet's news off the Corporate Communications team. Also, to further build news awareness, an email that pulls news content directly from the CMS into an email template is sent to employees each day.

CELEBRATING EMPLOYEES

Work is work and play is play—except, that is, when work is play. Organizations are increasingly cultivating relationships among employees so that they will better understand one another, collaborate successfully, and create a more pleasurable work environment.

Lamprell's intranet encourages employees to share in each other's successes and celebrate things such as work anniversaries, birthdays, and new hires. Messer

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Construction Co.'s intranet showcases executive promotions, new employees, and work anniversaries. Also, employees are encouraged to volunteer, and to share their efforts and plans on the intranet.

SYSTEM STATUS

The intranet remains the de facto place to find out which applications and technology systems are functioning or malfunctioning within the organization. IT groups embrace the idea of communicating status on the intranet's homepage. This helps them avoid having to send a shotgun email to all users and saves all users from having to deal with that email; it also helps users triage whether a system is actually down or if some other issues are affecting its performance.

Offering status updates on the intranet can save employees many wasted hours trying to find, diagnose, and deal with system status issues. The communication also goes both ways, as employees can easily inform IT of any system malfunctions.

The Norwegian Government Security and Service Organization displays information about the organization's key systems and their status.

Flight Centre combines simple self-service options and one-to-one assistance. The homepage includes IT system status information, making it easy for IT to inform all employees about system outages.

SEE SOMETHING, SAY SOMETHING

Even the most diligent management teams can struggle to keep up with every possible issue at an organization. Winning intranets provide assistance in this area. For example, the Anthem intranet has a section that encourages employees to report any issues they see related to ethics, finance, fraud, or security. A tool consolidates possible issues, offers links to descriptions to help employees identify them, and provides methods for reporting them.

GOOD FORMS

Traditionally, intranets have suffered from an insidious issue: bad forms. This year's winning intranets have corrected this with simple forms that have clear labels, well-positioned fields, and help text peppered in just the right places. For example, the Norwegian Government Security and Service Organization eliminates busy work and possible user errors by prepopulating form fields with user data and offering built-in common workflows.

FAT FOOTERS

Fat footers—that is, a large footer at the bottom of every page—help employees find information that they were unable to locate on the page or through global navigation. Fat footers may include duplicate global navigation or a site map, or call out elements that are harder to find, such as administrative links, social links, and contact information.

IBM Bluemine's fat footer includes help, FAQ, accessibility, and contact information. EBRD's footer includes help for the intranet, HR, and IT. Anthem, BHP, and Duke

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Energy offer various elements in their footers, including site maps, support, search, social, help contacts, intranet tips, and links related to safety and ethics.

HELP

Ideally, intranets shouldn't need to offer help; they should simply be easy to use without it. It never hurts, however, to offer instructions and tips that make features and content easy to locate and lift usage to its highest potential.

3M peppers concise messages throughout forms and other places to explain and reassure employees. IBM's Bluemine includes help, FAQ, detailed release notes for each app update, what's new information, and help about each tool and dashboard. It also offers short video vignettes that describe how to use key features.

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Best Practices for the Intranet Design Process

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

For the past 16 years, we have examined intranet design patterns across case studies of award-winning intranets, as well as in our intranet research work for our clients and other NN/g reports. Through this process, we have identified specific steps to create intranets that meet user needs. Screenshots and features might inspire you, and case studies might educate and inform, but without a good design process, it is difficult to create an outstanding intranet.

Here, we offer a few of the most important recommendations for designing a successful intranet that can truly help your organization and its employees.

BASIC STEPS TO ACHIEVE GREAT INTRANET DESIGN

Successful teams take several common steps to create great designs:

1. Get management buy-in
2. Quickly pinpoint stakeholder champions across the organization and keep them involved
3. Launch the discovery process to learn about employees and their needs
4. Review the current intranet's analytics and support logs
5. Inventory and audit tools and applications
6. Review and plan resources and intranet development
7. Run field studies and usability tests of current systems with employees
8. Set intranet goals
9. Create and share personas
10. Develop a content strategy
11. Brainstorm design ideas
12. Continually collaborate with stakeholders via interviews and workshops
13. Review design iterations with target users and conduct ongoing usability testing
14. Inventory and audit content
15. Research and build the IA
16. Conduct card-sorting exercises with stakeholders and users
17. Iterate menu design and organization
18. Tree-test categories and links

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19. Plan and communicate a governance strategy
20. Support, train, and establish ongoing enrichment and rewards for content managers and authors
21. Establish a sustainable governance model
22. Promote and advertise the intranet before, during, and after launch (or launches, in an Agile world)
23. Set up analytics before launch
24. Measure UX through research and other metrics

CONSIDER INCREMENTAL FEATURE ADDITIONS

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

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

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

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

USE SOCIAL TO LEARN

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

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

PLAN FOR MOBILE FROM THE START AND AS ITS OWN DESIGN

Not every team needs to buy in to the “mobile first” mentality, but it would behoove every team to think about mobile early on, and to truly plan the mobile UX. Although some technologies almost automatically create mobile versions of desktop intranets, you should not assume that the defaults are usable. Plan the mobile design and usability test it.

Decide how to optimize for mobile access and desktop from the start, including how you will do it and which devices you will target. Teams today almost always choose a responsive approach to accommodate all display sizes, rather than pigeonholing people to a particular device. Regardless, if you plan, prioritize, and test features and

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content throughout the design process, you can optimize the UX for all targeted devices.

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

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

WATCH EMPLOYEES WORK

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

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

USE SITE ANALYTICS

Set goals for the types of analytics you want to capture on the intranet. Next, capture that data both *before* the new project begins and *after* launch. You can then compare the two data sets. Finally, keep up with analytics; they are powerful numbers and can support (or disprove) the hypotheses you derive from behavioral user research.

CONDUCT USABILITY RESEARCH

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

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

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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 design, pre-launch, and post-launch activities. Advertise the redesign and the new features. Following are some tips to create a good intranet design process:

- Include key players from around the organization in the design process. These people can help generate design and feature ideas, as well as excite their groups about the coming new intranet.
- As you develop the new design, consider giving employees access to it (on a staging server) and encourage their feedback. Explain the major changes and highlight the benefits.
- Include usability and beta testing in the design and communication processes. Follow up the usability research by communicating how user behavior and feedback helped steer design changes. (But don't use the testing sessions themselves to convince people that the new intranet is better; these sessions are best used solely for research and analysis.)
- Designate staff members to respond to employee questions and comments for the first few months after launching a new design.
- Stage events, contests, and promotions on the intranet itself and in other places to describe new features and processes.
- Write clear, descriptive advertisements for the new design and specific features. Place them strategically in physical work spaces—such as in elevators and the cafeteria—as well as in email newsletters, in online news sections, and on the intranet itself.
- Keep promoting the site for a few months after launch; some employees may not have time to explore it right away.

UNDERSTAND THE TECHNOLOGY AND CONSIDER THE CLOUD

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

Over the years, winning intranet designs have typically come from organizations that took a technology solution and made it fit their needs by extending or customizing it rather than simply using it out of the box. These teams took the time to understand their tools inside and out, and worked with them to meet their organization's specific requirements.

Some teams have the time and expertise to customize tools themselves, while others rely on outside experts to help with technology issues. Also, some companies customize from the get-go, while others stick to what's offered initially and

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customize later. In either case, knowing the technology and any challenges up front can help minimize unexpected glitches down the road.

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

Finally, before you commit to any tool, you should make sure that your design fits its requirements. Do your best to audit content and derive a general IA before choosing a tool. Some solutions have rigorous requirements, and you won't know whether you can meet them unless you have at least some detailed information about your design in advance.

PERSONALIZE AFTER YOU CREATE THE INFRASTRUCTURE

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

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

HELP YOUR CONTENT CONTRIBUTORS SUCCEED

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

The most welcomed intranets are those with fresh information that people need and want. One way to keep information updated and interesting is to give employees ways to add and edit information themselves. Allowing people other than designated content providers to also contribute content gives them a stake in the intranet's success. Such efforts invariably produce compounded returns. Fostering excellent content providers results in better content overall, which leads to more varied and useful information, which drives more employees to the intranet, and thus ensures that the intranet remains a business-critical tool.

CONSIDER ACCESSIBILITY

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

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

MEASURE ROI

When embarking on any intranet redesign, measure whatever you can. To show the new site's return on investment, you must have starting values against which to measure.

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

A simple ROI measurement is *time on task*—that is, the time people require to accomplish a task, both before and after a redesign. Use the decreased measure of time on task to calculate the resulting financial savings across your organization. Communicate the positive ROI both to the various departments involved and 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 their 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

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sites to be successful, they must be maintained and managed. Although a team dedicated to the redesign is, of course, going to be larger than a team left to run the intranet once it's established, the remaining team must be large enough to support the site structure, help content contributors, and plan and execute enhancements and continual improvements to the site.

Intranet development shouldn't be viewed as a finite project, but rather as a continual process that includes the following:

- Governance team meetings
- Assigned (and accepted) roles
- Budgeted resources
- Support for content creators
- Audits and reviews of site structure and content
- Search tool enhancements
- Technology maintenance

As this list shows, at the end of a redesign effort, much work remains to be done.

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3M

OVERVIEW

COMPANY

3M is a global science company that never stops inventing. Using 46 technology platforms, the company's integrated team of scientists and researchers works with customers to create breakthroughs. 3Ms inventions have improved daily life for hundreds of millions of people all over the world. With $32 billion in sales, its 91,000 employees connect with customers all around the world. Scientists, researchers, and marketers work across countries and across subjects to solve challenges big and small.

Headquarters: St. Paul, Minnesota, US

Company locations: 3M operates in 70 countries.

Locations where people use the intranet: All 3M locations

Annual revenue: $32 billion in nearly 200 countries

THE INTRANET

Users: 91,000 employees and 30,000 contract workers have access to 3M Go

Mobile approach: Responsive web design

Technology platform: SharePoint Online

TEAM

In-house:

3M Leadership:

Krysta Neisen (Digital Workplace)
Laura Opsahl (Communications)
Steve Yetter (IT)
Tracy Kodluboy (IT)

3M Team Members:

Laurie Workman (Digital Workplace)
Meghan Keating (Digital Workplace)
Tonya Gale (Digital Workplace)
Silvia Stahn (Digital Workplace)
Paul Raimondo (Digital Workplace)
Jennifer Besadny (Digital Workplace)
Max Blair (Digital Workplace)
Mike Lynch (IT)

Outsourced:

DMI: global research and initial concept
Rightpoint: design and usability
Shinebox: launch campaign materials

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INTRANET TEAM

Team members shown here (back row, left to right): Meghan Keating, Paul Raimondo, Silvia Stahn, Jennifer Besadny; (front row, left to right): Laurie Workman, Laura Opsahl, Krysta Neisen, Tracy Kodluboy. Not pictured: Tonya Gale, Max Blair, Steve Yetter, Mike Lynch.

HIGHLIGHTS ABOUT THIS WINNER

3M Go, 3M's intranet, is a modern digital workplace hub that connects 91,000 employees and 30,000 contract workers in 70 countries with 15 different primary languages. A beautiful design, targeted content based on user preferences, saved tools, and help that helps are a few of the traits that help make 3M Go users such go-getters.

Findings from exhaustive research with more than 4,500 employees acted as a beacon for the intranet design team as it worked to banish multiple disconnected systems with significant usability issues and replace them with one centralized, personalized, and customizable hub that gives employees quick access to everything they need.

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- **Inspiring visual design:** The unassuming visual look employs flat 2.0 elements, legible and attractive text, anchoring visual grids, obvious page hierarchy, whimsical icons, and splashes of color (corporate 3M red, of course) in the just the right places.
- **Toolbar:** A toolbar with custom favorites and tools appears on every intranet page and makes it possible for employees to immediately access the tools and information they need to do their jobs effectively.
- **Preferences:** 3M Go's *Preferences* reside somewhere between traditional personalization and customization features. As users select their preferences, content is targeted to them accordingly, ensuring that they see the type of content pertinent to them. Preferences are highly flexible, and employees may change them at any time; the effects of such changes are instant.
- **Fetching methods for employee profile updates:** The site creatively entices employees to update their employee profiles. The more information in these profiles, the more coworkers can learn about one another and locate the person they need. The UI makes the editing process obvious, while a progress chart aims to ignite employees' spirit to achieve.
- **Intranet education:** A monthly email newsletter and weekly homepage tip card educate employees about 3M Go and set them up for success.
- **Assistance and tours:** Peppered throughout the forms and elsewhere, concise messages explain and reassure employees, without overwhelming them. These just-in-time information tidbits are powerful teaching instruments. In addition, UI tours explain various sections of 3M Go so users can learn about, locate, and use important features.
- **Submit news form:** The UI for the form to submit news is so straightforward that it requires no training whatsoever. Further, fields and labels help communicators assign thorough and appropriate metadata to ensure that their stories are findable.
- **Consistent page layout:** Templates are flexible enough to be used in multiple places. The result is a cohesive looking and acting interface that makes it easy for employees to quickly acclimate on any page.
- **Formatting text for the web:** Text-heavy pages are pleasantly palatable because of the deft deployment of several web writing techniques: content chunking, obvious headings and subheadings, bullets, and bolding important words.

BACKGROUND

In 2015, the 3M Communications team pitched 3M executives, asking for funding to build a brand-new global digital workplace from the ground up, instead of simply migrating all existing intranet content to 3M's new SharePoint Online platform. The

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Communications team saw an opportunity to create a modern, global digital workplace that would transform the way 3Mers communicate, collaborate, and work.

The business case the team made was simple:

- Replace 3M Source, a burning platform with serious usability issues, which was the primary intranet for 76% of 3M's workforce.
- Deliver cost savings by retiring an additional 25+ off-platform country intranets.
- Increase global communication and collaboration by providing a single platform for all employees, created based on research and feedback from employees globally.
- Increase productivity for employees, communicators, and site/content owners.
- Maximize 3M's investment in Office 365 (O365) and SharePoint Online.

The team received the funding, and the journey began.

The next two years were spent on the most challenging yet rewarding project the team had ever completed. 3M is a complex, global matrixed organization made up of 91,000 employees, 30,000 contingent workers, 5 business groups, and 32 functions spanning 70 countries and 15 primary languages. In addition to 3M's organizational complexity, the team faced other challenges, including a lack of clear ownership for the 3M Source legacy intranet, more than 25 other country intranets to replace, and decentralized communications with more than 300 site and content owners and 200 communicators globally.

3M Source was a usability nightmare—a link farm with virtually no search capabilities, no central navigation, and different designs and layouts on almost every site due to a complete lack of governance and content strategy. In addition, 3M Source required technical resources to update content.

The Communications team, which previously owned only the company's HR sites, took full ownership of the new platform, created a dedicated Digital Workplace team, established a strong partnership with IT, and started planning for the project of a lifetime.

The team had in-house expertise in project management, content strategy, and communications. It also leveraged three external agencies to provide research, design, and launch materials: DMI conducted the global research and initial concept, Rightpoint completed design and usability activities, and Shinebox created the launch campaign materials.

To design the new platform to meet the needs of 3Mers globally, the team spent three months on extensive research with employees, site and content owners, and communicators around the world. This research consisted of one-on-one and group interview sessions, focus groups, workshops, a digital workplace survey, a communications survey, and benchmarking with more than 15 companies.

Based on these research activities, the team identified and delivered on the key features that were most important to the organization and its employees:

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- **Consistent design and intuitive navigation:** With a branded, simple, and clean design, and a consistent layout for all 3M Go sites, users can navigate effectively throughout the platform.
- **Personalization:** All sites and content displayed throughout the platform are relevant to users based on their selected preferences for language, location, and organization.
- **Centralized news and events:** All of the news and events displayed on the 3M Go homepage are based on the user preferences. This eliminates the need for users to go to multiple disconnected systems and sites to find company, location-specific, and organization news.
- **Quick-access toolbar:** A customizable omnipresent toolbar section provides quick and easy access to *Favorites*, *Tools* (systems/applications), *Collaboration Sites*, and *Preferences*.
- **Search functionality:** Robust search functionality allows users to search for everything in one place… all people, content, sites, tools, news, and events. Search refiners and filters help users narrow their searches and find what they are looking for. All content on 3M Go is tagged with consistent metadata to enhance search functionality.
- **Search feedback:** To continuously improve search and ensure that employees find what they need, a question at the bottom of the search page—*Did you find what you were looking for?*—lets users provide feedback.
- **Mobile access:** Built on SharePoint Online with responsive design, 3M Go is accessible from any iOS device (3M does not support Android).
- **Easy content management:** Hundreds of site owners, content owners, and communicators globally can easily create and maintain their own content, without a developer's help. Approver workflow, easy step-by-step training, and centralized support and site administration help this distributed content management model succeed.

As a part of the strategy, the management team decided that, instead of migrating content to a new system, the team would evaluate and rebuild all pages to ensure that content was accurate, up-to-date, and relevant. This allowed them to tag all content with accurate metadata, which let content display based on user preferences and also enhanced search capabilities.

After two years of research, design, development, and content creation, 3M Go was launched globally in August 2017.

The dedicated team had transformed the employee experience from one of having to access multiple disconnected systems with significant usability issues to using a centralized, personalized, and customizable place that gave them quick access to everything they need for day-to-day work.

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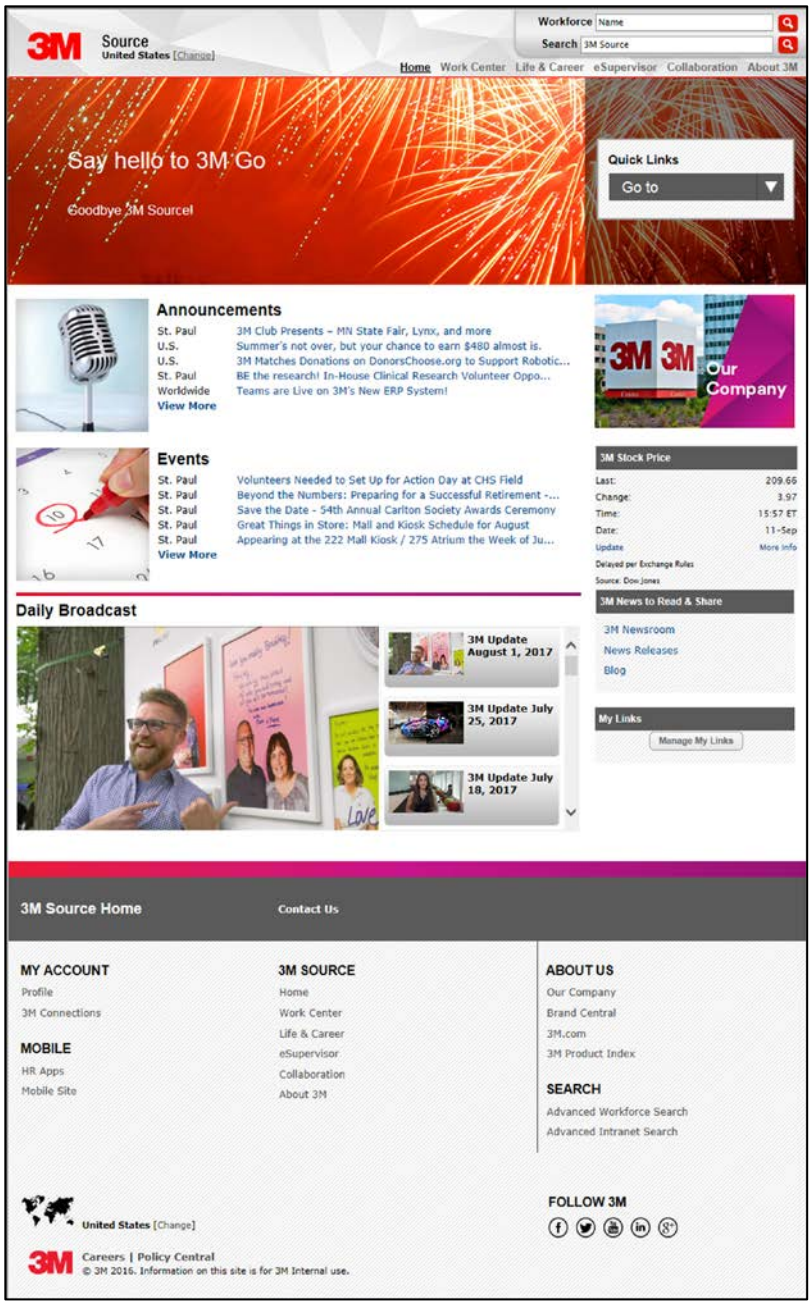


Image 1. The Previous 3M Intranet. 3M Source was the company's primary intranet prior to 3M Go. It underwent a facelift in Q1 2015 to apply the 3M brand look and feel to the homepage. 3M Source was a usability nightmare; it was a link farm with virtually no search capabilities, no central navigation, and a different design and layout on almost every site due to a complete lack of governance and content strategy. In addition, updating the content on 3M Source required technical resources. *01_3M_01_3M_Source_Archived.PNG*

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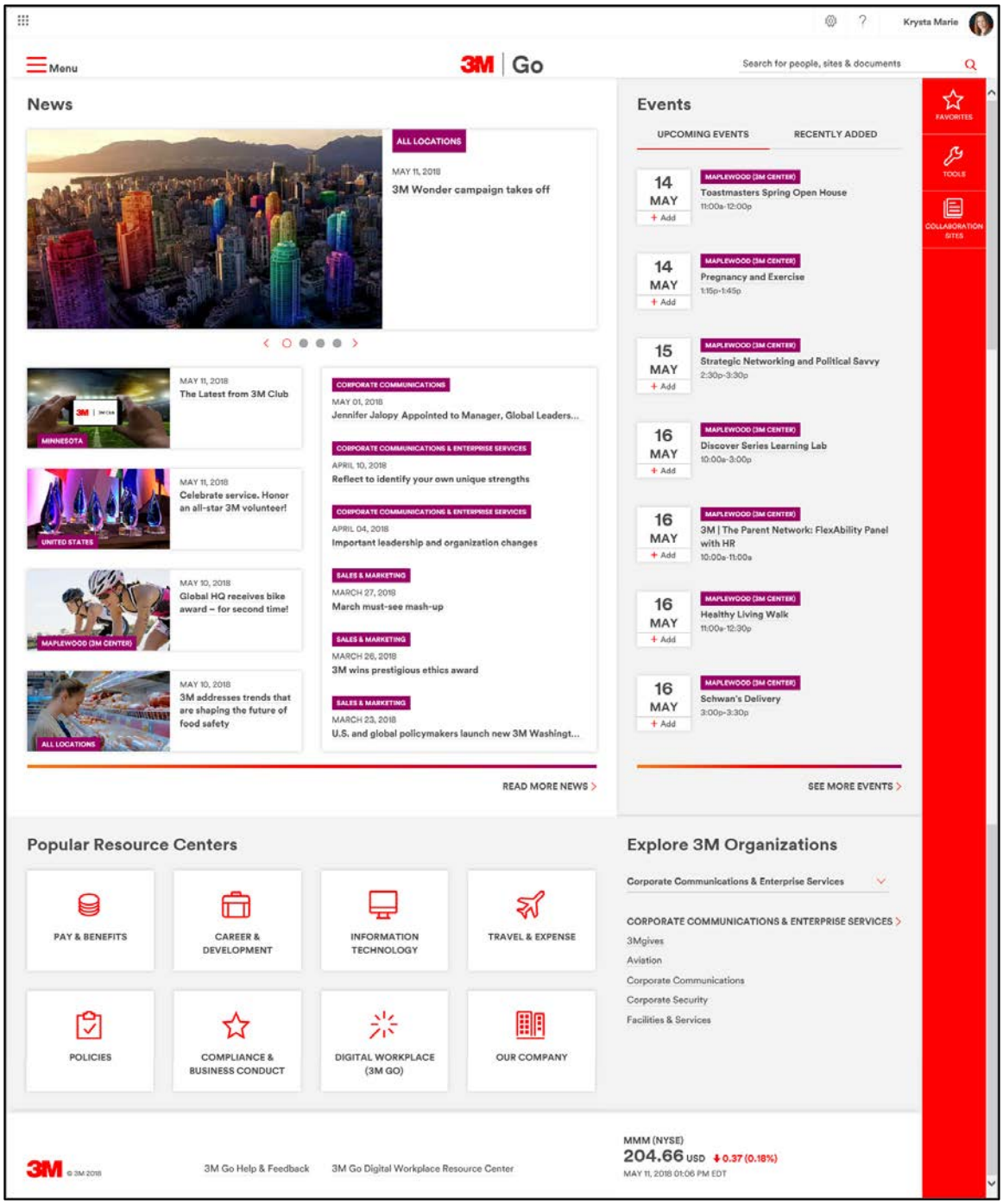


Image 2. 3M Intranet Homepage (Version 1) at Launch. This version combined global news with the user's country news in the left column below the featured carousel; the right column contained targeted organization and function news. The homepage also had a very large *Events* section that users felt was overly crowded with content. *02_3M_02_Home_Page_Version1.PNG*

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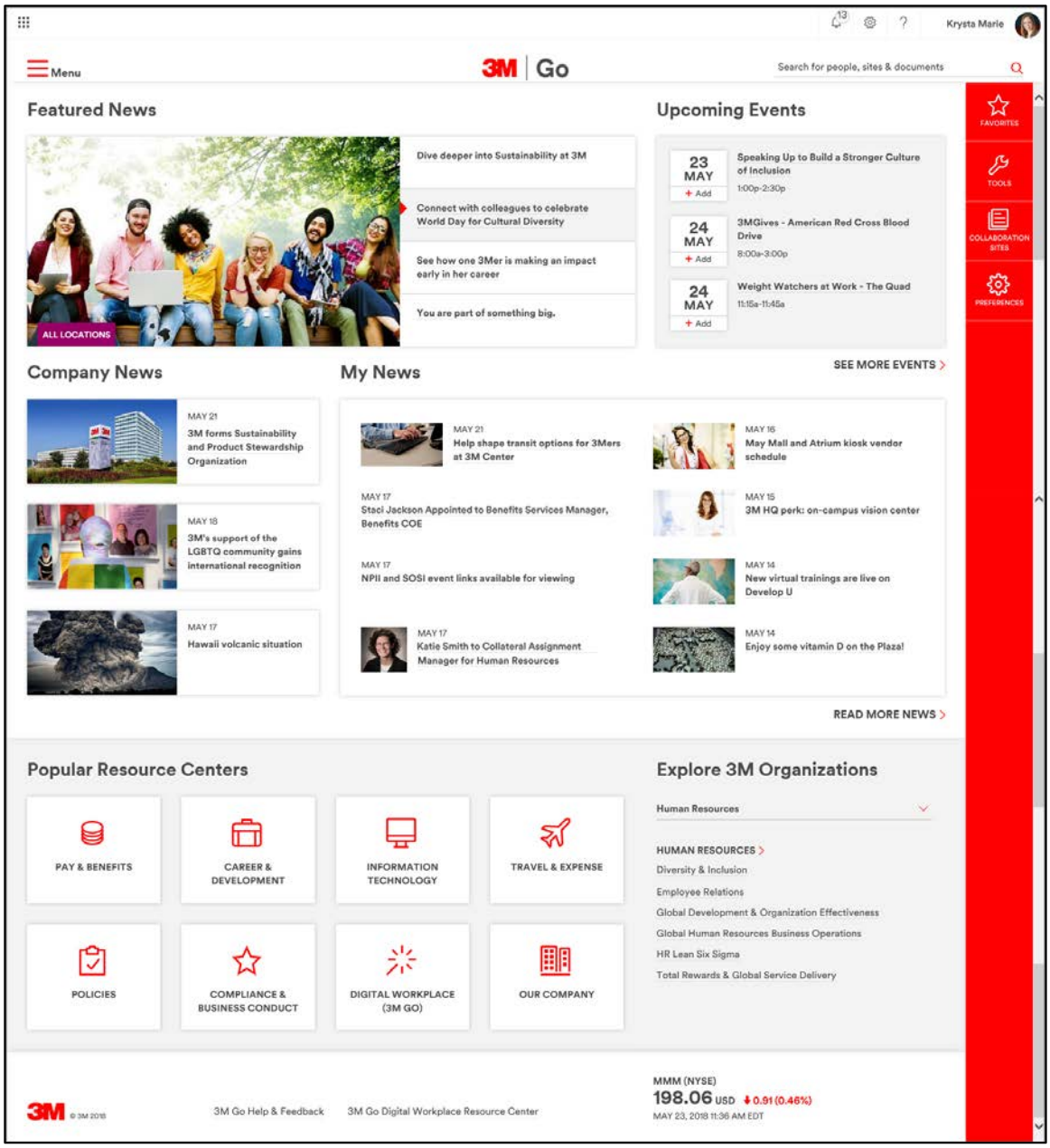


Image 3. 3M Intranet Homepage (Version 2). This version of the 3M Go homepage shows an updated news and events layout. The *Popular Resource Centers* web part provides quick access to the Corporate Resource Center sites that are most frequently used in each user's country. *Explore 3M Organizations* defaults to users' preferred organization, but they can easily select other organizations. *03_3M_03_Home_Page_Version2.PNG*

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DESIGN REVIEW

Homepage

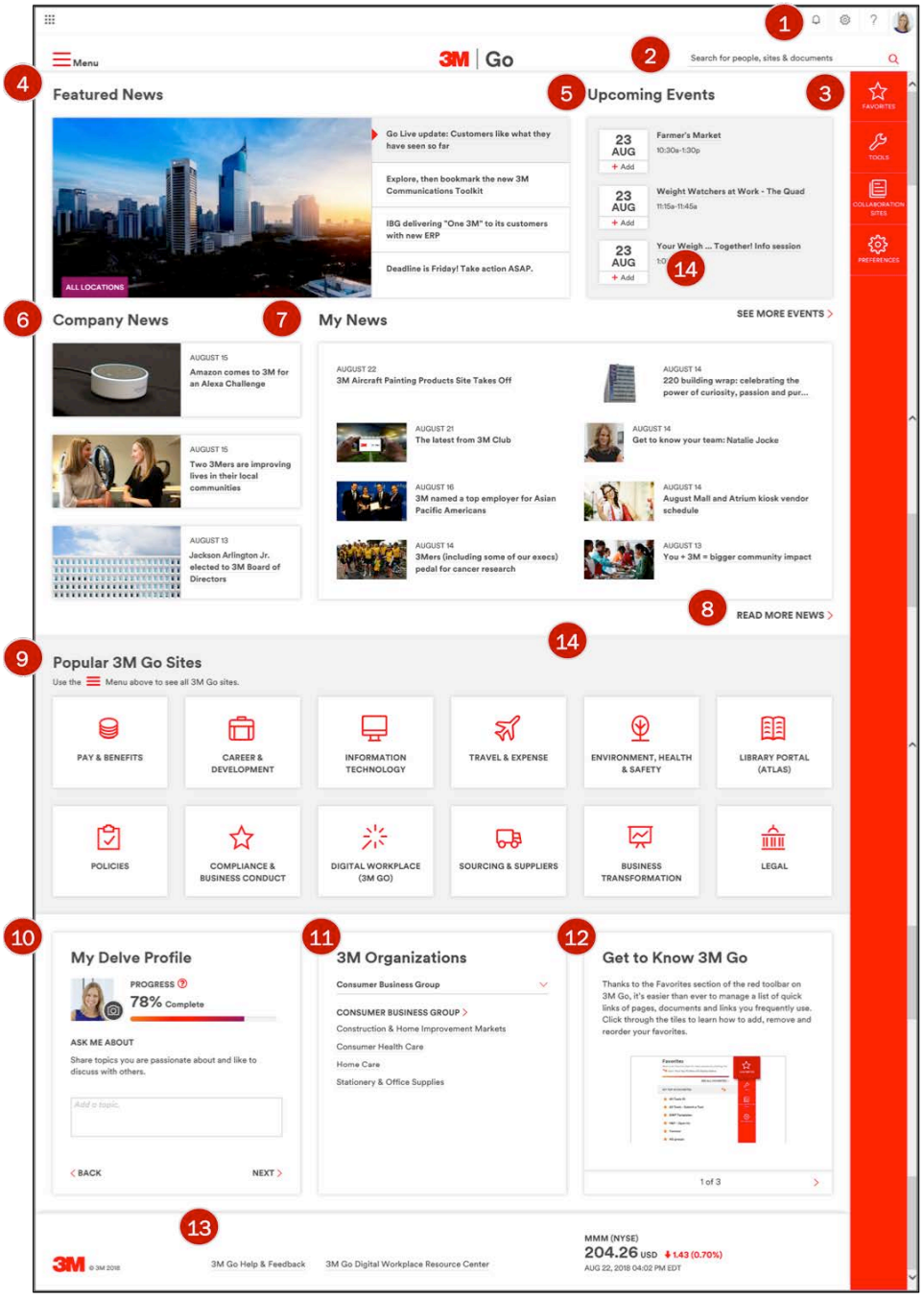


Image 4. 3M's New Intranet Homepage. The new 3M Go homepage offers various types of news, tool, and events, and a lovely visual design. *04_3M_04_Home_Page_Live.PNG*

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Homepage, Highlights

What a fresh, simple look for such an intellectual intranet. 3M Go offers a mix of different types of news that keeps employees well informed about topics they need and want to know about. The homepage information displays based on the logged-in user's preferences for organization, location, and language.

1. **Utility (O365) navigation:** The icons in the far upper right are available on each page of 3M Go and link to alerts, settings, help, and the user's profile information.
2. **Search:** Employees can search for information, tools, sites, coworkers, and documents using the search field in the upper right.
3. **Toolbar:** The ever-present red toolbar on the right gives employees quick access to their favorites, tools, collaboration sites, and preferences.
4. **Top news:** The *Featured News* section takes the top spot on the homepage and cycles through four top news headlines and related photos.
5. **Events:** Showing upcoming events on the homepage is a successful way to entice employees to get involved. At a glance, employees can see events that are happening each day. The *Upcoming Events* section in the upper right displays calendar icons with the event dates. A small *Add* button below each date allows employees to add events to their Outlook calendar. The event's name and time displays to the right of the calendar icon.
6. **3M Company news:** Internal 3M news appears in the homepage's *Company News* section. Each item includes the headline, an image, and the date—just enough to wet an employee's appetite for information.
7. **Targeted news:** The news displayed in the *My News section* is based on the options the user chose in the *Preferences* section.
8. **More news:** If the headlines on the homepage don't suffice, not to worry; the *Read More News* link leads to a page with additional news based on the user's preferences.
9. **Popular resources:** Getting to commonly used resources must be quick and easy. The *Popular 3M Go Sites* section makes it so by displaying large buttons that lead to a dozen most-used areas based on the logged-in user's country. If employees are looking for something beyond the 12 most popular sites, a prompt at the top of the section directs them to a menu at the top of the page that lists additional areas.
10. **Adding user profile information:** A robust employee directory includes not only information from HR and IT databases, but also content that employees provide about themselves to further enrich the directory. Gamification and an abundantly simple design that is positioned to remind people to update their profiles are all creative

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tactics that coax people to add more details to their profile. The *Progress* barometer shows the percentage of the profile they have completed, which can be very motivating to employees and gamifies the task. Further, asking specific questions and offering users an answer field right in the card on the homepage makes updating information so simple that there is almost no excuse for not doing so. Finally, having this option on the homepage reminds people to do it, boosting ease-of-use up a notch.

11. **Organizations:** 3M includes 5 business groups and 32 functions—in other words, many corporate teams and resources to be aware of and understand. The *3M Organizations* card on the homepage gives employees a jumpstart on exploring their company by displaying the list of links for all 3M organizations, with the logged-in user's organization selected by default.
12. **Intranet tips:** The team sends a monthly newsletter to employees about how to best use 3M Go. The team's research showed, however, that employees thirsted for even more 3M Go knowledge, and key themes and questions often arise in help and feedback tickets. Armed with this information, the team creates targeted content for both the newsletter and *Get to Know 3M Go* card, offering tips to educate users on a specific "topic of the week." The User Experience & Analytics team is responsible for keeping this content fresh and relevant.
13. **Footer:** A small page footer offers a few key links to intranet help and feedback, a resource center, and the stock price and direction (up or down).
14. **Visual design:** A subtle grey background appears behind the *Events* and *Popular 3M Go Sites* sections. Although barely visible, this touch helps separate the sections on the page without having to use a thick colored line around sections, bold color for each section, or an obvious zebra-stripe effect.

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Update Preferences

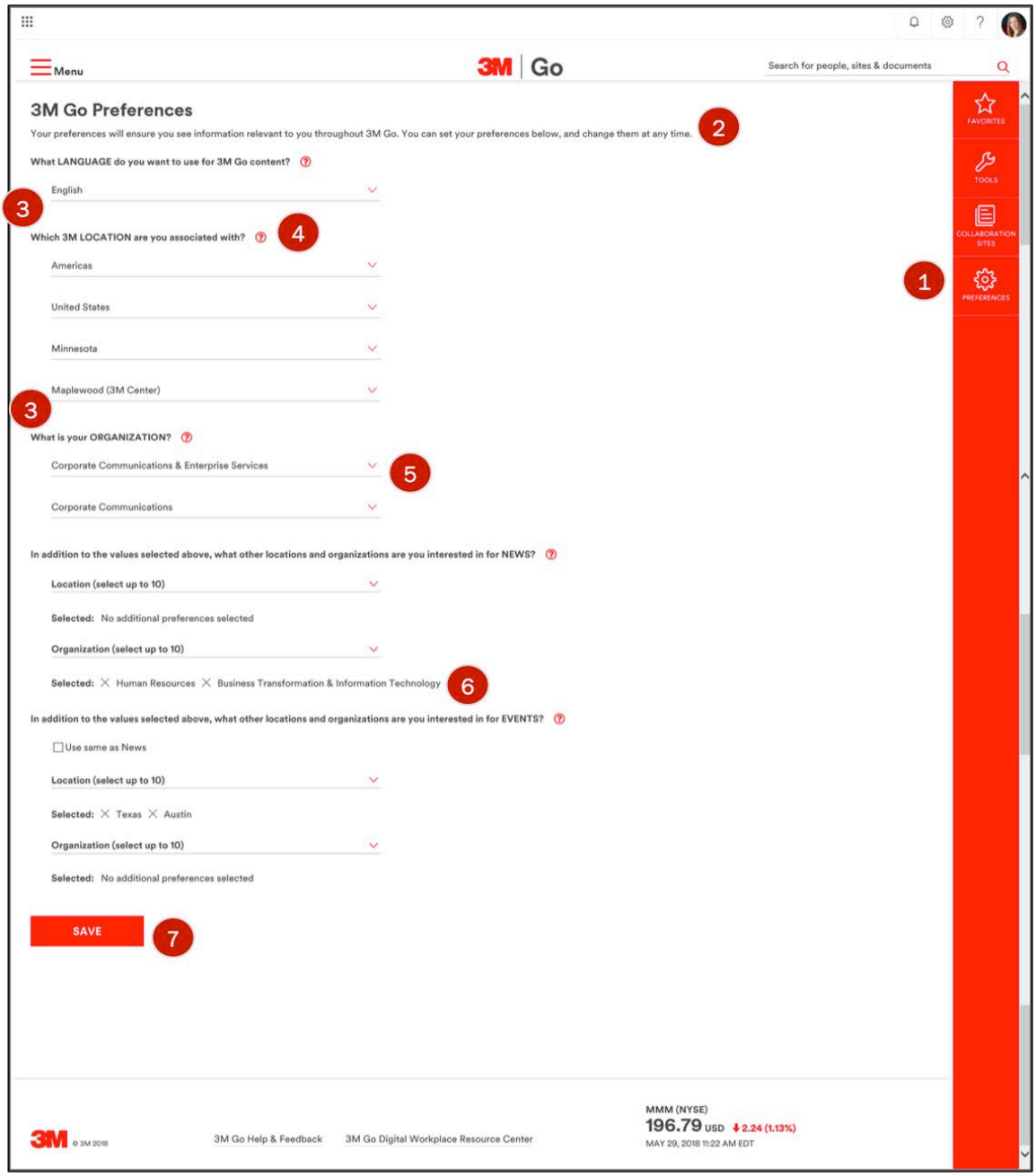


Image 5. 3M Intranet Update Preferences. On the *3M Go Preferences* page, employees choose their primary language, location, and organization—all of which govern the content they will see on the intranet. *05_3M_05_Update_Preferences_Live.PNG*

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Update Preferences, Highlights

On 3M Go, user preferences are significant because they drive much of the content that users receive, including news, events, and the default language. Designers ensured that users would tend to their preferences by asking them to fill out a form the first time they log in to 3M Go; all of the form's fields are required, except for department.

1. **Access to preferences:** Users can change their preferences at any time. The gear icon in the red toolbar on the right, available on every 3M Go page, leads to the *3M Go Preferences* page.
2. **Description:** Two short sentences at the top of the page describe the implications of choosing preferences. Information bits such as this, which are peppered throughout the design, help employees learn about the system and how it can help them in their everyday work.
3. **Clear field labels:** Each question in the form is easy to understand. Words pertaining to the question's main subject appear in all capital letters, making these information-bearing words very visible.
4. **Field help:** The question mark icons that appear by each question offer assistance.
5. **Lists:** To make it extra easy for users to select their preferences—as well as remind or teach them about the available preferences—designers used drop-down lists as the field mechanism.
6. **Multi-select:** For some items, such as location, users can select multiple responses. The selected items appear by a *Selected* prompt. This design avoids the common problem of users not seeing all the selections in a multi-select list. Users can easily remove a selection by clicking the small *x* icon to the left of its name.
7. **Save:** The red *Save* button is positioned at the bottom of the form, as expected. The color stands out against the white page background and, combined with the understandable action verb, it creates a clear call to action. The word *Save* also implies that the changes will occur immediately, as opposed to *Submit*, which could imply that the changes require approval and may entail a time lag before taking effect.

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News

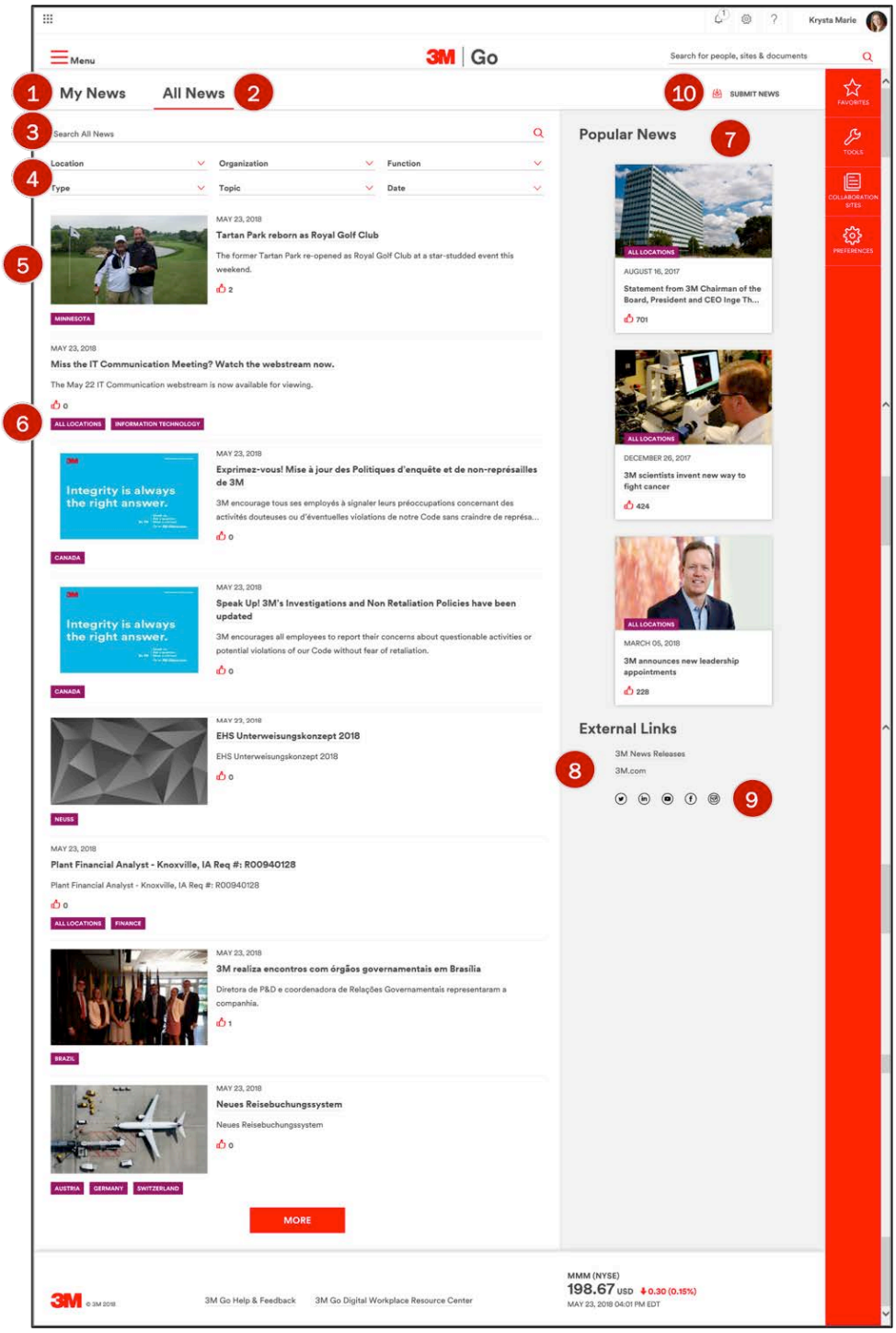


Image 6. 3M Intranet News. News is divided into two sections: news related to the user (*My News*) and *All News*. *06_3M_06_All_News_Live.PNG*

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News, Highlights

3M Go's news section offers all news in a central place. Local news is currently targeted to 38 different countries, reaching many of the 91,000 employees and 30,000 contract workers. Since the new design was introduced, the news on 3M Go is being read 400% more each day than it was on the previous 3M Source intranet.

1. **User-centered news:** The *My News* tab at the top of the page displays news related to the logged-in user based on that user's selected 3M Go preferences.
2. **All news:** Employees are not limited to seeing news directed only toward them. The *All News* tab lets users explore and search for all stories from all countries in all languages. Translation is no small task, as 3M recognizes 15 primary languages: English, Spanish, Portuguese, French, German, Dutch, Italian, Swedish, Russian, Polish, Korean, Thai, Simplified Chinese, Japanese, and Traditional Chinese.
3. **Search field:** The *Search all news* field allows users to type in queries.
4. **Filters:** Filters at the top of the page allow users to see items related only to areas they chose, based on *Location, Type, Organization,* and more.
5. **News story information:** Each news story appears with the headline, date (written in an international format), related image, short summary, and how many likes it has garnered.
6. **Facets:** The magenta rectangles below each news item are a helpful feature. These facets list metadata—such as location and organization—tagged to each article.
7. **Popular:** Three of the most popular trending news items are showcased in the right rail under the unmistakable label: *Popular News.* This feature gives employees an immediate sense of what's important to their coworkers.
8. **External news:** The *External Links* section leads to press releases and the public-facing website. These links make it easy for employees to see what their organization is presenting to customers and the public.
9. **Social:** At the bottom of the right rail, social icons for Twitter, LinkedIn, YouTube, Facebook, and Instagram lead to the 3M channels. This makes it quick and easy for employees to find out what the company and its followers are saying.
10. **Submit news:** Communicators can quickly initiate a new news story via the *Submit News* link at the top.

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News Story

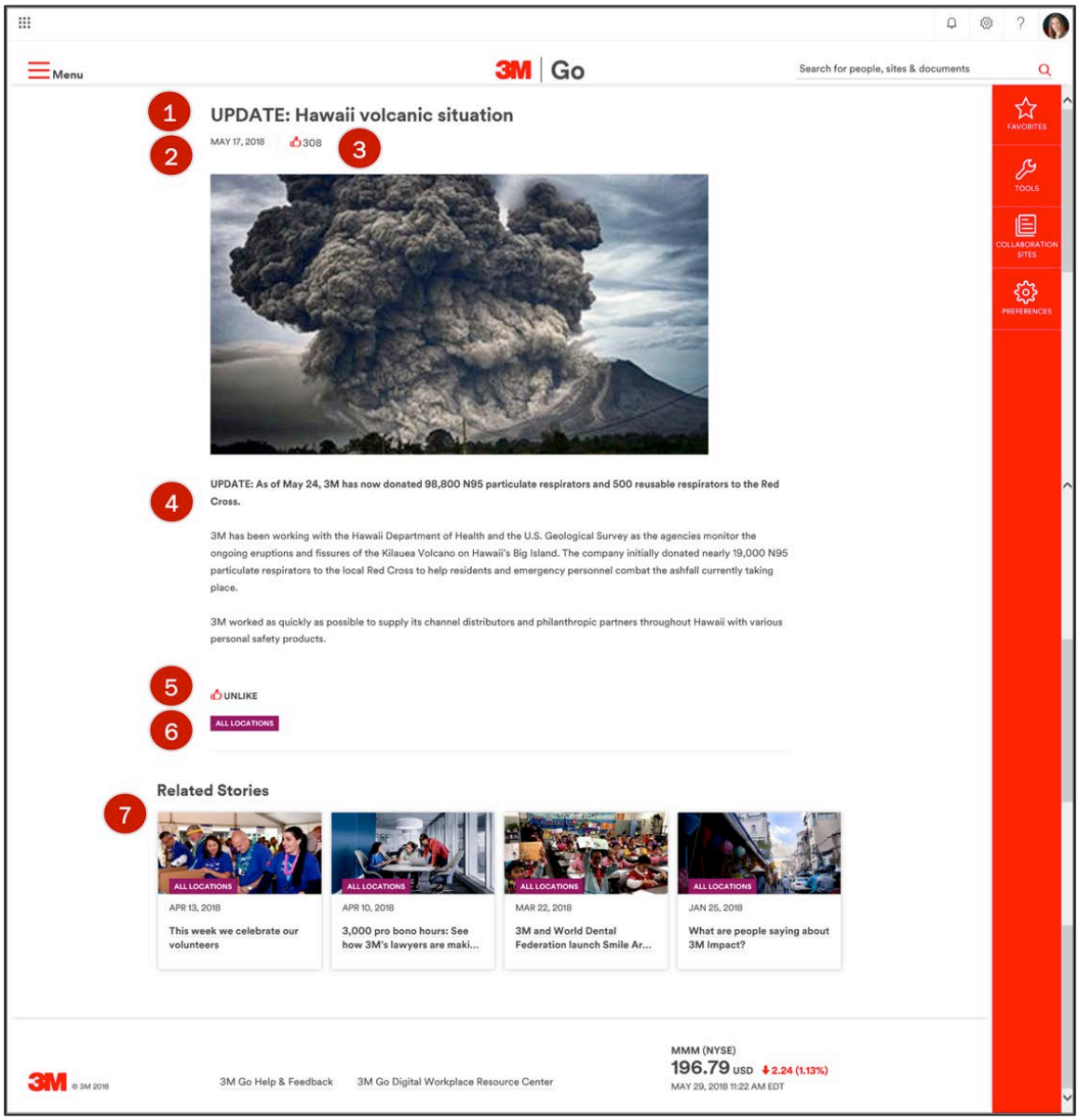


Image 7. 3M Intranet News Story. News stories include text, an image or a video, related stories, and the option to "like" the story. *07_3M_07_News_Story_Live.PNG*

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News Story, Highlights

Each news story on 3M Go uses a consistent format, as well as optional elements such as an image or video (at the top) or links within the story.

1. **Title:** The story title is highly visible at the top of the page in large bold letters.
2. **Date:** The date the story was published appears at the top in an international format, with the month spelled out and a four-digit year.
3. **Likes:** Putting the number of "likes" at the top of the page gives employees an immediate sense of a story's popularity.
4. **Image:** Authors have the option to add an image or video to support the story.
5. **Story:** The news itself appears in the center of the page.
6. **Like:** After reading the story, users have the option to like (or unlike) it; this icon appears after the text.
7. **Facets:** The facets the author selected for the story appear at the end of the page.
8. **Related stories:** Four news items targeted to the same audience and related to the article appear at the end of the page in the *Related Stories* section. This is a good position for these items, as people who read the story to the end are likely to look there for more information.

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Submit News

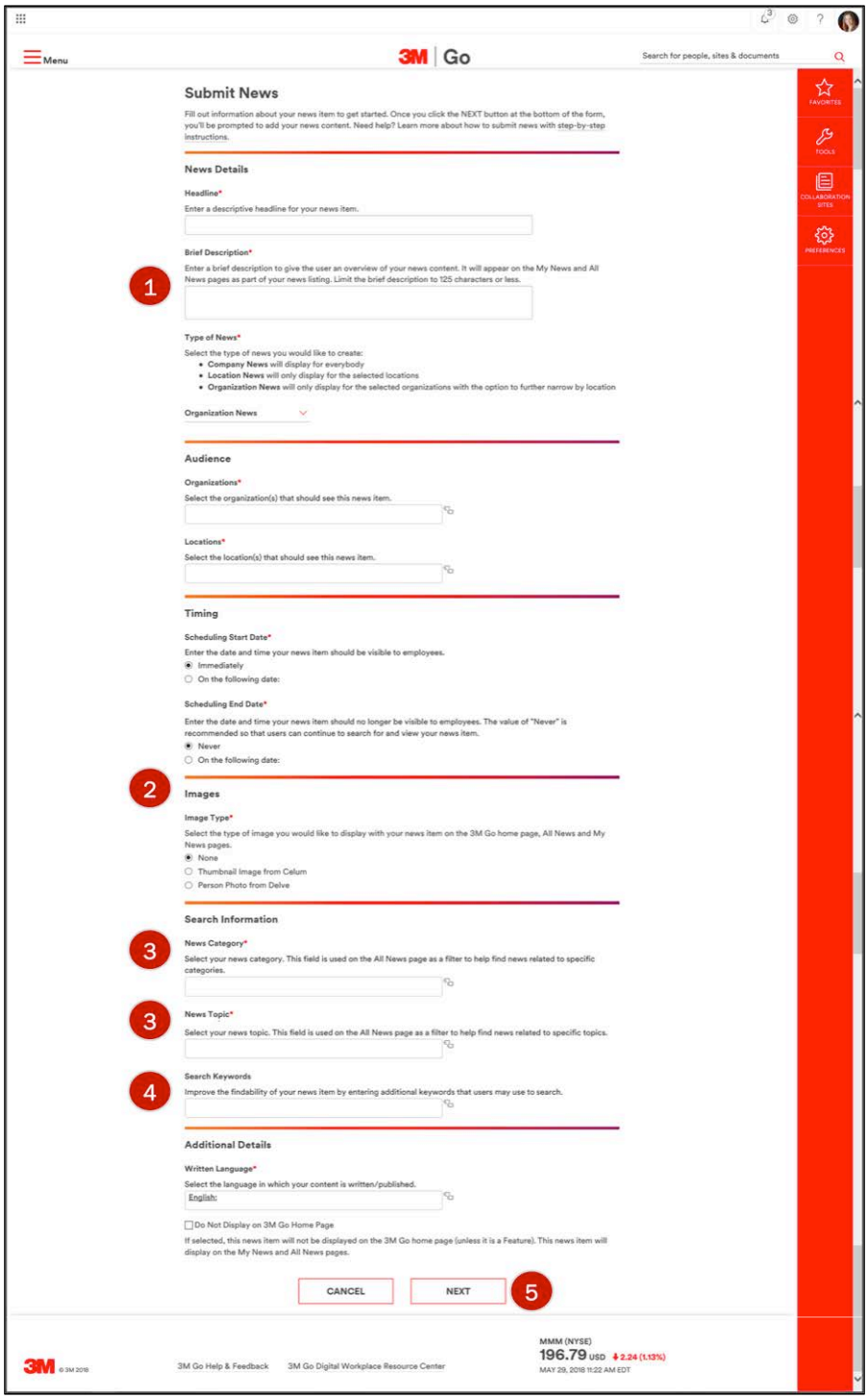


Image 8. 3M Intranet *Submit News*. Content writers can create news items with such ease on 3M Go. *08_3M_08_Submit_News_Form_Page1_Live.PNG*

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Submit News, Highlights

The *Submit News* form for authors is so simple that it requires no CMS training, but a link for help is available at the top, just in case. The *Submit News* form is readily available in multiple places, including the *My News* page, the *All News* page, and the *Communications Resource Center*. The form's simplicity and findability are likely behind the 513% increase in news stories published on 3M Go compared to the previous 3M Source intranet.

1. **News description:** Field labels are very descriptive and communicate to writers the ramifications of their selections. For example, the *Brief Description* field label doesn't end with those two words, though technically they would suffice. Below the label, the system offers more pertinent information: *Enter a brief description to give the user an overview of your news content. It will appear on the* My News *and* All News *pages as part of your news listing. Limit the brief description to 125 characters or less.*
2. **Images:** The *Images* section allows users to choose no image or upload an image from another system.
3. **Topic and category:** Authors must choose a topic and category for the story, which makes it more likely that interested users will find it.
4. **Keywords:** Authors are urged to add keywords with the prompt: *Improve the findability of your news item by entering additional keywords.*
5. **Next step:** The *Next* button leads to a second form where authors can add the news story content.

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Submit News Form

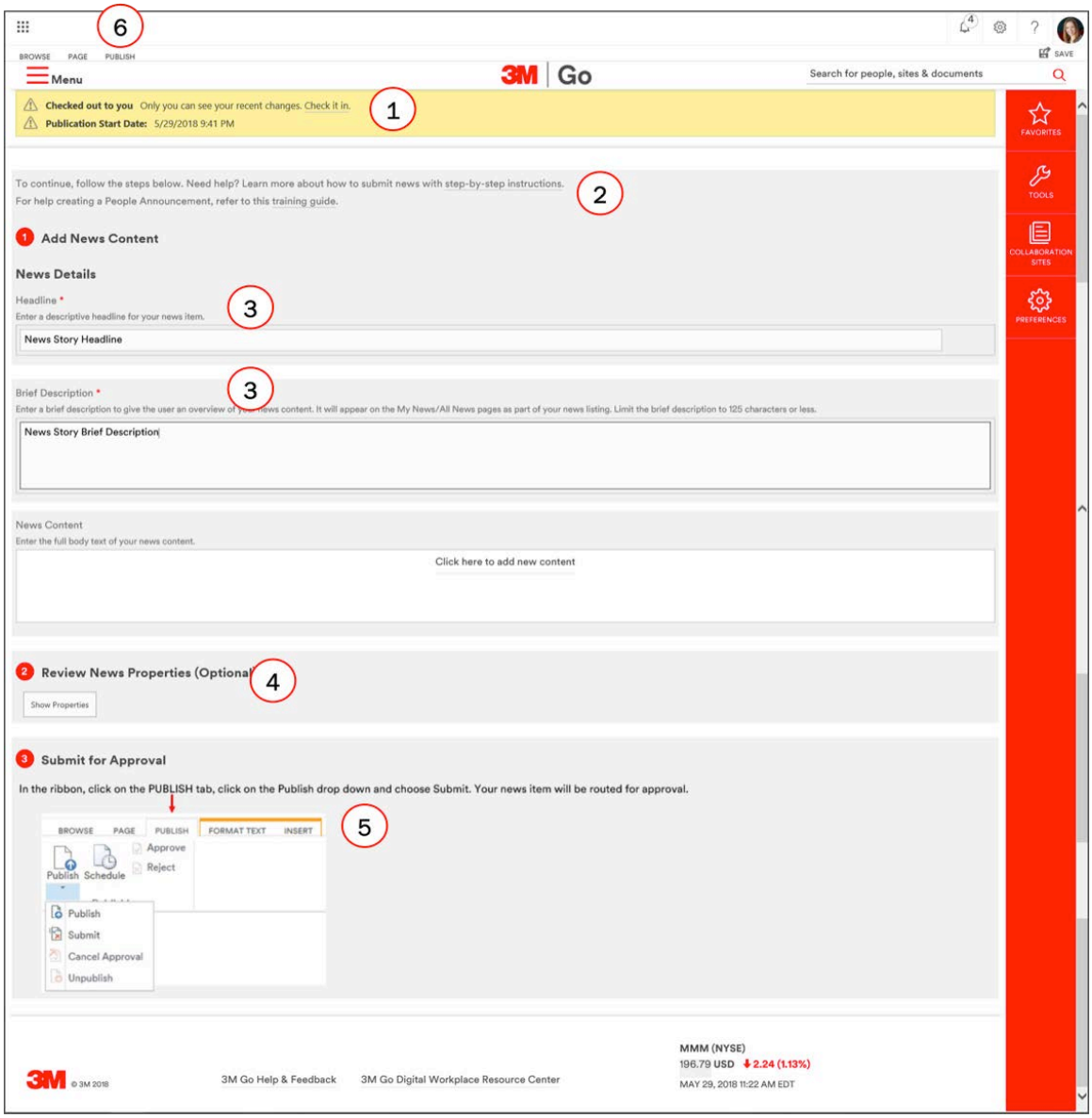


Image 9. 3M Intranet *Submit News* Form. The form to add a news story is easy to use, even without training.
09_3M_09_Submit_News_Form_Page2_Live.PNG

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Submit News Form, Highlights

The form to add news content leads authors through the process of posting news. The form's design eliminates the need for training and requires minimal support, resulting in considerable time and cost savings. Also, the form's simplicity has given rise to the creation of many more news items. On average, 13 news stories are published each day on 3M Go compared to an average of 2 stories per day on 3M Source.

1. **Content management:** A yellow section at the top of the form includes information about the news item's status, including the person currently interacting with the document and the document's planned go-live date.
2. **Help:** If users need more information, they can click links to *step-by-step instructions* and a *training guide* at the top of the form.
3. **Edit:** The story title and description are carried forward from the previous form but appear in fields so that users can edit them if they desire.
4. **Review:** Users can review and edit the topic selections they made in the previous form.
5. **Publish:** Short instructions and a helpful screenshot inform users to use the *Publish* tab in the ribbon at the top of the form to submit the story. Once the form is submitted, it is routed for approval via workflow.

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Events

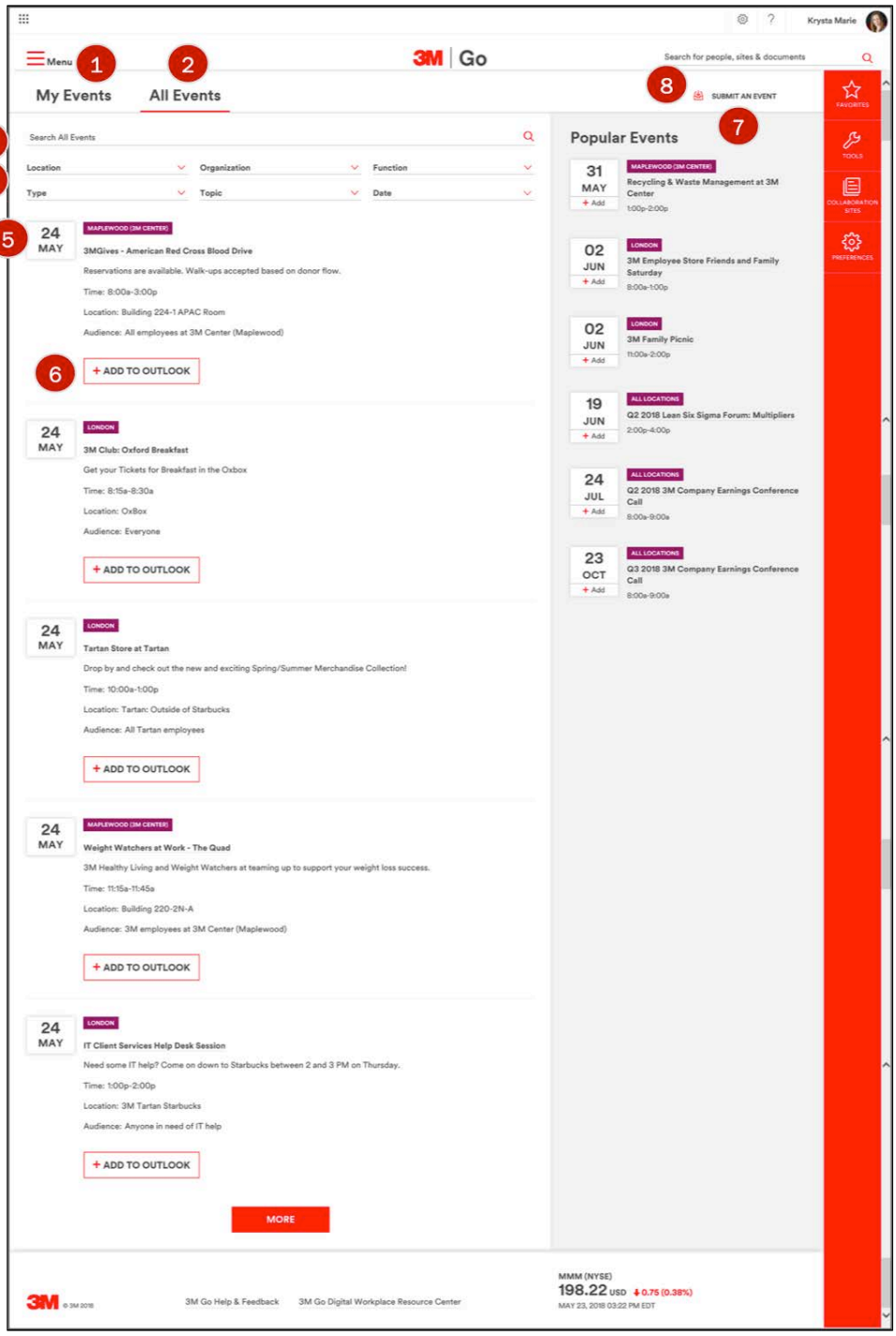


Image 10. 3M Intranet Events. Employees can search and filter events, or see only events based on their preferences. *10_3M_10_All_Events_Live.PNG*

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Events, Highlights

The layout for the intranet's events page is very much like that of the news page in that it offers two tabs: one for personalized events and one for all events. Employees can search events, use filters to refine a list of events, and view popular events. Events are accessed via the *See more events* link on the homepage.

1. **User-centered events:** The *My Events* page displays events based on the logged-in user's preferences.
2. **All events:** The *All Events* section lets employees explore and search for all events from all countries in all languages.
3. **Search field:** The *Search all events* field lets users type in a query related to the event they want.
4. **Filters:** Filters at the top of the page let users view events related only to areas they choose, based on *Location, Type, Organization,* and more.
5. **Event information:** Each event appears with the building location, event name, information about reservations or tickets, specific room location, and audience. Each bit of information offers more insight into the event to help employees decide if they would like to attend.
6. **Add to calendar:** A very helpful feature is the *Add to Outlook* calendar button, which appears below the event.
7. **Popular:** Six of the most popular events are showcased in the right rail under the label: *Popular Events.* This lets employees directly sense the pulse of their coworkers.
8. **Submit event:** Employees can quickly create a new event via the *Submit an Event* link at the top of the page.

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Toolbar, *Favorites*

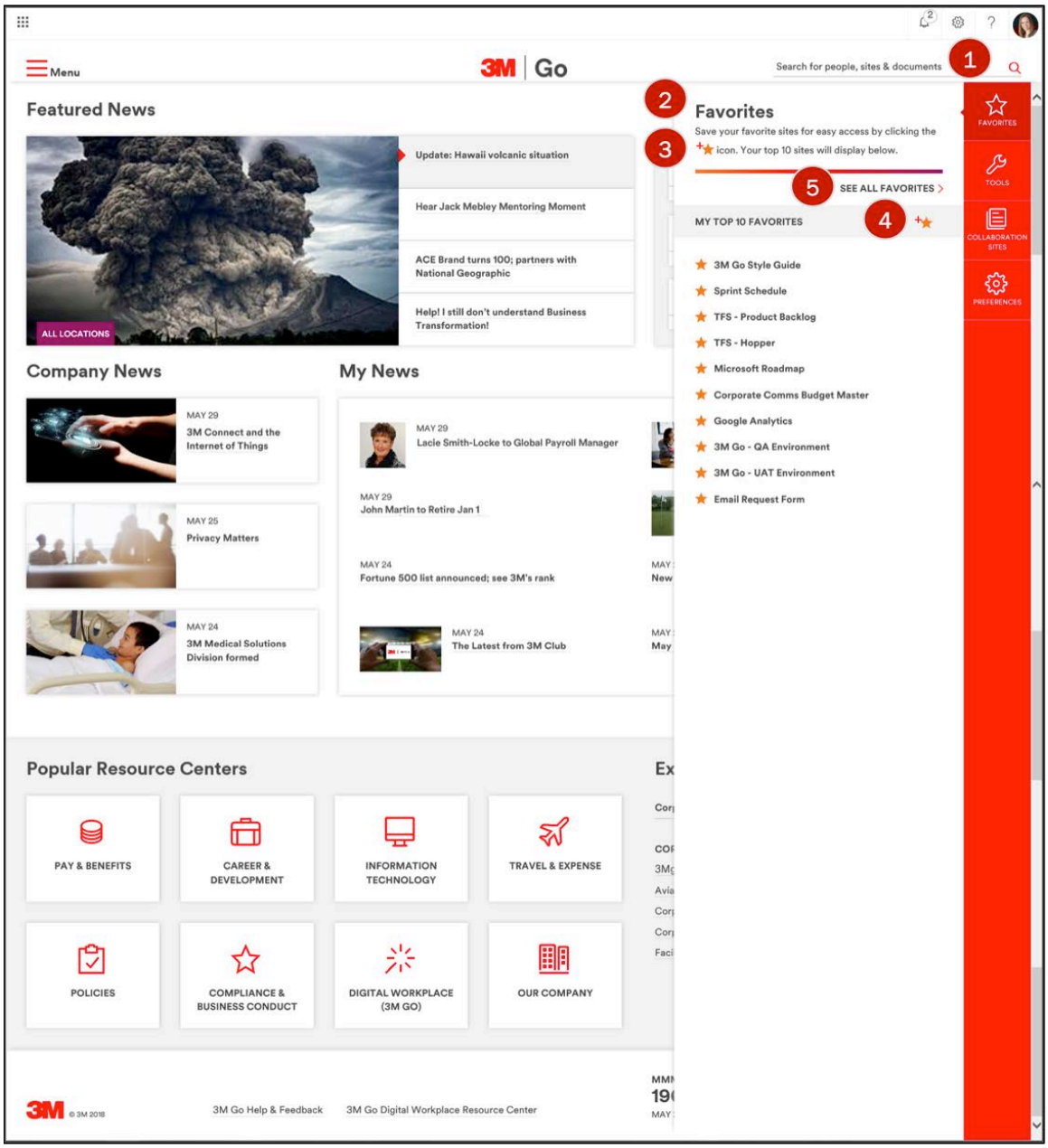


Image 11. 3M Intranet Toolbar, *Favorites*. The right-side toolbar makes the user's favorites quickly accessible. *11_3M_11_Toolbar_Favorites_Live.PNG*

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Favorites, Highlights

Just one click of the mouse opens the world of user-selected favorite sites.

1. **Toolbar:** The always-present red toolbar that runs the length of the right side of pages includes icons for *Favorites, Tools, Collaboration Sites,* and *Preferences.* This pervasive design element makes it easy for employees to access the things they need no matter where they are on 3M Go.
2. **Favorites list:** Clicking the *Favorites* icon in the toolbar opens the *My Top 10 Favorites* panel with the user's top 10 sites, documents, or pages (any URL).
3. **Tip:** A tip at the top of the panel tells users how to create a favorite.
4. **Add:** Users can save a favorite by clicking the star and plus sign icon; this prompts them to name the favorite and add a URL. They can also add favorites on the *All Favorites* page.
5. **All:** Employees are not limited to seeing only their top 10 favorites. Clicking the *See All Favorites* link shows more favorites, and lets users drag and drop to reorder, delete, and add sites.

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Toolbar, *Tools*

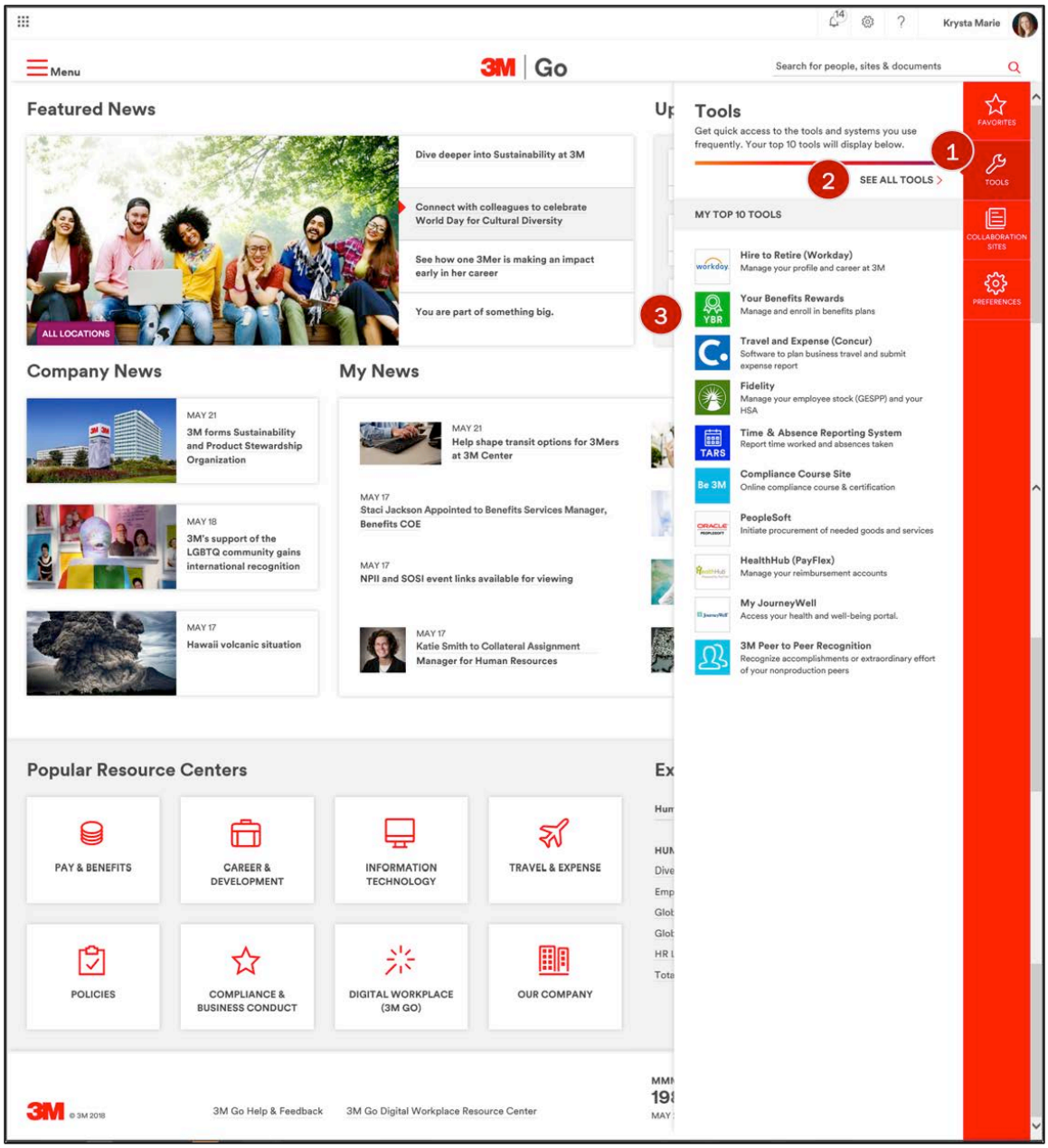


Image 12. 3M Intranet *Tools*. The list of tools saved by the user appears when the *Tools* icon is clicked. *12_3M_12_Toolbar_Tools_Panel_Live.PNG*

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Tools, Highlights

All toolbar sections offer a consistent layout and experience.

1. **Toolbar:** Selecting the *Tools* icon in the toolbar opens a panel with the top 10 picks of all the tools saved by the user.
2. **All:** The user can see more tools by clicking the *See All Tools* link.
3. **List:** Each tool in the list includes the tool's name and a helpful description of what it can be used for. An icon appears with each tool, which helps users easily recognize them.

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Toolbar, *My Tools*

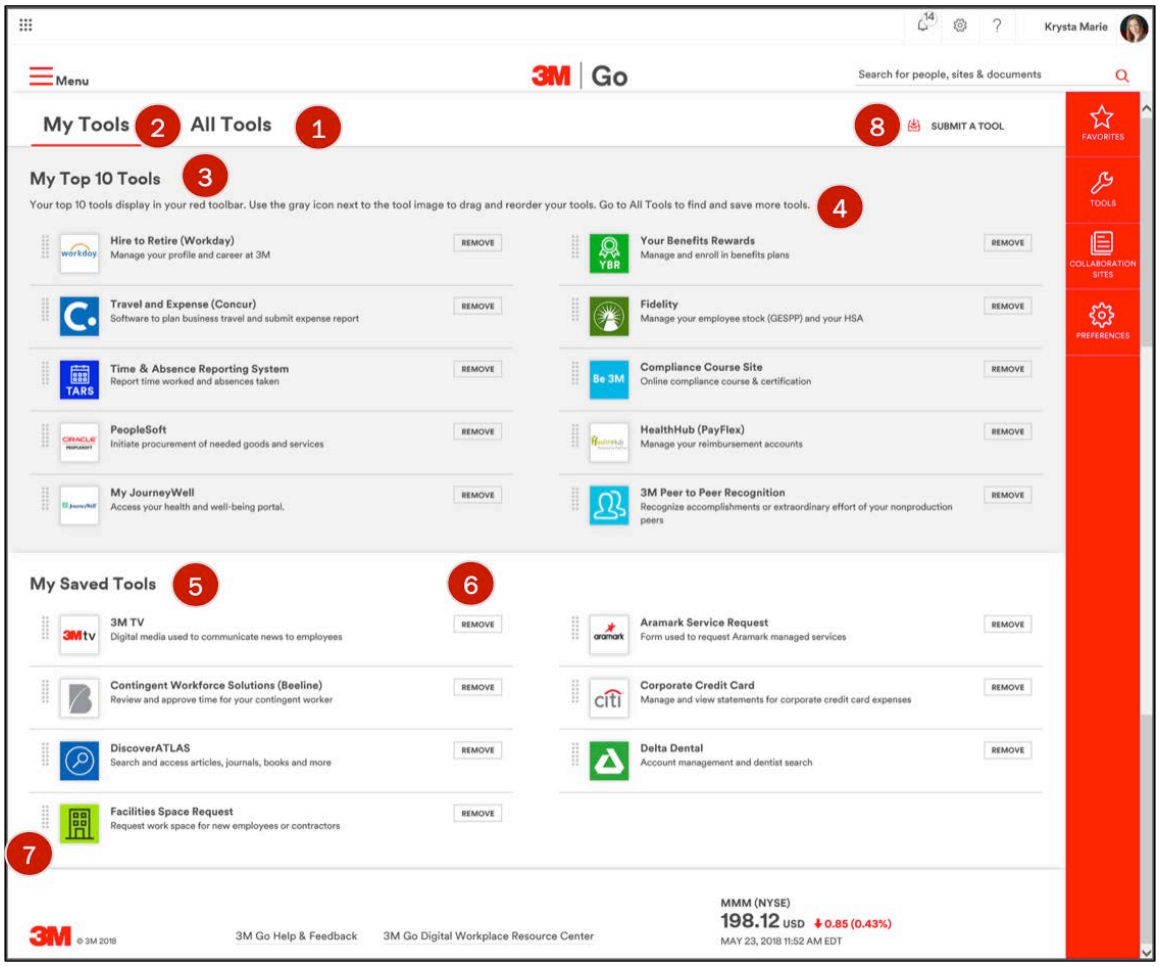


Image 13. 3M Intranet *My Tools*. The *My Tools* page shows the user's saved tools. *13_3M_13_My_Tools_Live.PNG*

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My Tools, Highlights

After clicking the *Tools* icon in the toolbar and then the *See All Tools* link in the panel, a page of tools is displayed.

1. **Tabs:** The two tabs at the top are *My Tools* and *All Tools.*
2. ***My Tools*:** The default tab is *My Tools*, which displays the user's saved tools. The red underline indicates selection, and repeating the term *My* in the page subtitles helps connect the tab name with the page content.
3. **Top tools:** The user's designated top 10 tools appear in the top section of the page labeled *My Top 10 Tools*.
4. **Tip:** Under the *My Top 10 Tools* headline is another example of helpful inline text. This text tells users that the top tools appear in the tools panel, how to reorder the tools, and how to find more tools.
5. **Saved tools:** All tools the user has saved appear in the bottom section of the page under *My Saved Tools*.
6. **Delete:** To the right of each tool is a *Remove* button so users can clean up any tools they no longer need.
7. **Tool order:** Users can use the grey "handle" icon to change the order of the tools by dragging and dropping.
8. **Adding a tool:** Users who use an application that is not offered on 3M Go can add the tool by choosing the *Submit a Tool* link at the top of the page. This opens a form with a series of questions about the tool, what it is used for, who owns it, etc. The *Submit a Tool* link is an easy and handy way to add tools, and it increases the likelihood that all tools used in the 3M digital workplace will be added to the intranet. The tools submissions are sent to the Digital Workplace team for governance review and approval.

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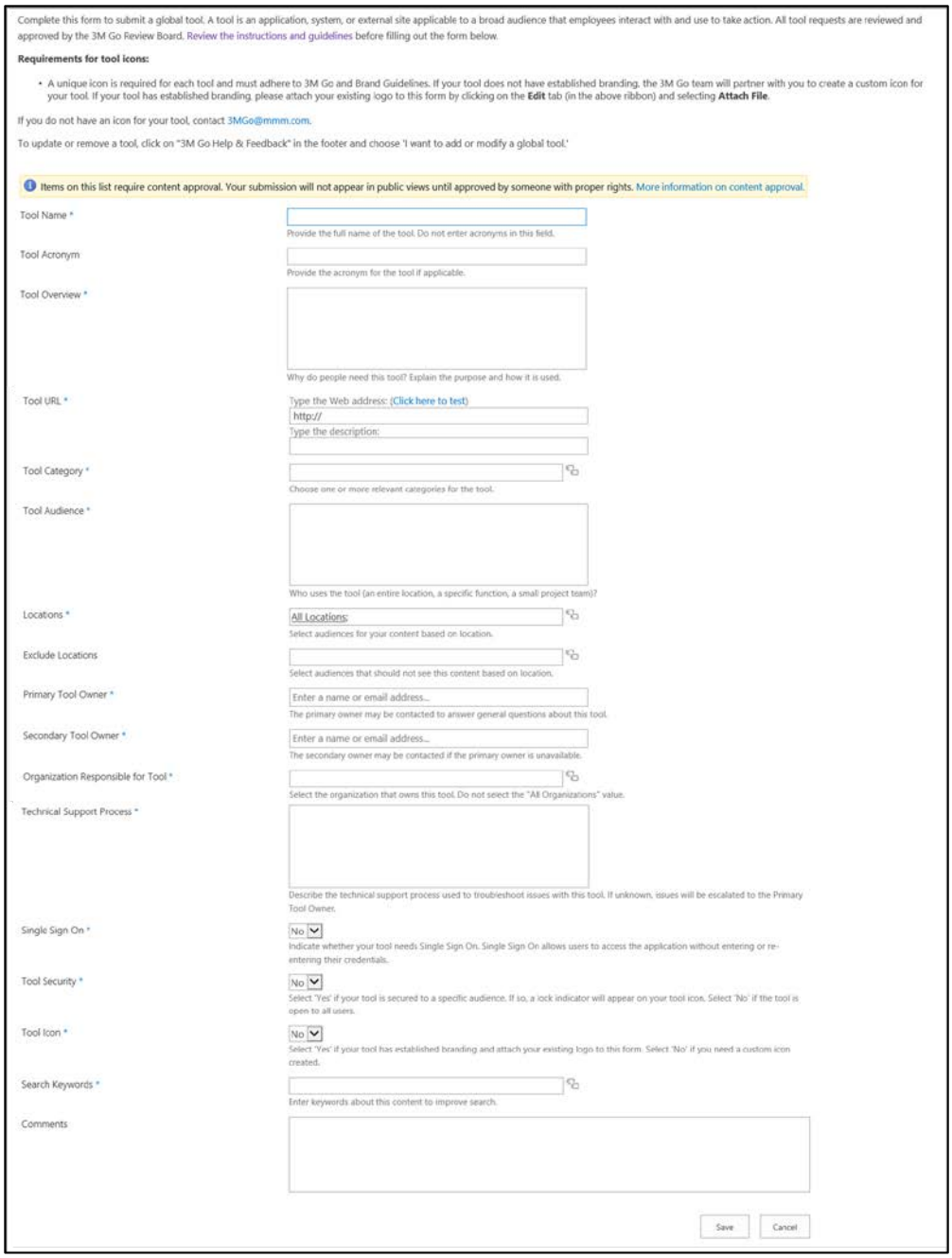
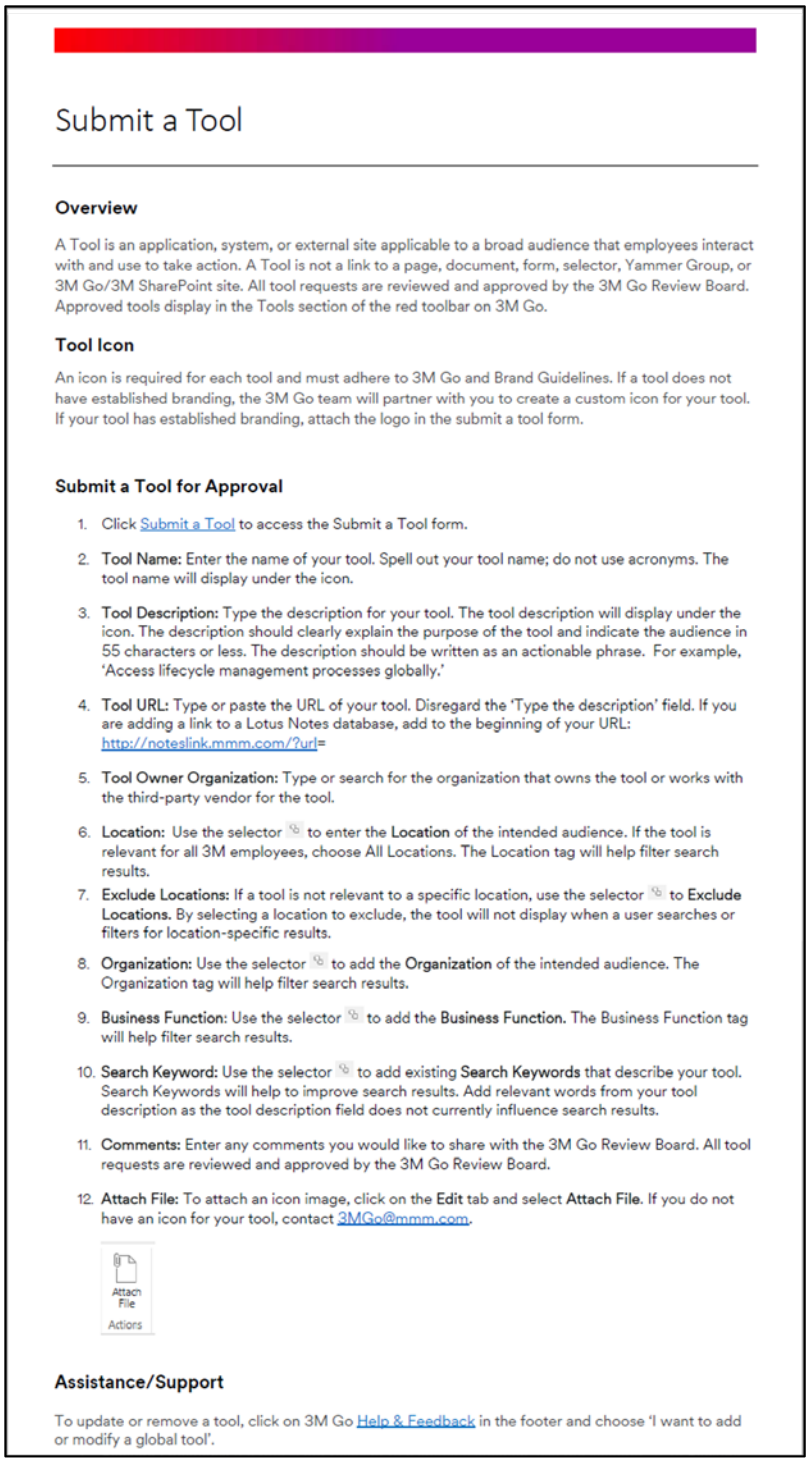


Image 14. 3M Intranet *Submit a Tool* Form. Tool owners can easily submit a request to have a tool added to the intranet via the *Submit a Tool* link. This link takes users to an intuitive and comprehensive form. Once submitted, the content strategy team evaluates the request and determines whether or not the tool meets the criteria for tools offered on the intranet.
14_3M_14_Submit_Tool_Live.PNG

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Submit a Tool

Overview

A Tool is an application, system, or external site applicable to a broad audience that employees interact with and use to take action. A Tool is not a link to a page, document, form, selector, Yammer Group, or 3M Go/3M SharePoint site. All tool requests are reviewed and approved by the 3M Go Review Board. Approved tools display in the Tools section of the red toolbar on 3M Go.

Tool Icon

An icon is required for each tool and must adhere to 3M Go and Brand Guidelines. If a tool does not have established branding, the 3M Go team will partner with you to create a custom icon for your tool. If your tool has established branding, attach the logo in the submit a tool form.

Submit a Tool for Approval

1. Click Submit a Tool to access the Submit a Tool form.
2. **Tool Name:** Enter the name of your tool. Spell out your tool name; do not use acronyms. The tool name will display under the icon.
3. **Tool Description:** Type the description for your tool. The tool description will display under the icon. The description should clearly explain the purpose of the tool and indicate the audience in 55 characters or less. The description should be written as an actionable phrase. For example, 'Access lifecycle management processes globally.'
4. **Tool URL:** Type or paste the URL of your tool. Disregard the 'Type the description' field. If you are adding a link to a Lotus Notes database, add to the beginning of your URL: http://noteslink.mmm.com/?url=
5. **Tool Owner Organization:** Type or search for the organization that owns the tool or works with the third-party vendor for the tool.
6. **Location:** Use the selector to enter the **Location** of the intended audience. If the tool is relevant for all 3M employees, choose All Locations. The Location tag will help filter search results.
7. **Exclude Locations:** If a tool is not relevant to a specific location, use the selector to **Exclude Locations.** By selecting a location to exclude, the tool will not display when a user searches or filters for location-specific results.
8. **Organization:** Use the selector to add the **Organization** of the intended audience. The Organization tag will help filter search results.
9. **Business Function:** Use the selector to add the **Business Function.** The Business Function tag will help filter search results.
10. **Search Keyword:** Use the selector to add existing **Search Keywords** that describe your tool. Search Keywords will help to improve search results. Add relevant words from your tool description as the tool description field does not currently influence search results.
11. **Comments:** Enter any comments you would like to share with the 3M Go Review Board. All tool requests are reviewed and approved by the 3M Go Review Board.
12. **Attach File:** To attach an icon image, click on the **Edit** tab and select **Attach File.** If you do not have an icon for your tool, contact 3MGo@mmm.com.

Attach File
Actions

Assistance/Support

To update or remove a tool, click on 3M Go Help & Feedback in the footer and choose 'I want to add or modify a global tool'.

Image 15. 3M Intranet *Submit a Tool* Form Help. This shows the step-by-step instructions provided for completing the *Submit a Tool* form. *15_3M_15_Submit_Tool_Help_Live.PNG*

Order NNG190115-7904-48466

Toolbar, *All Tools*

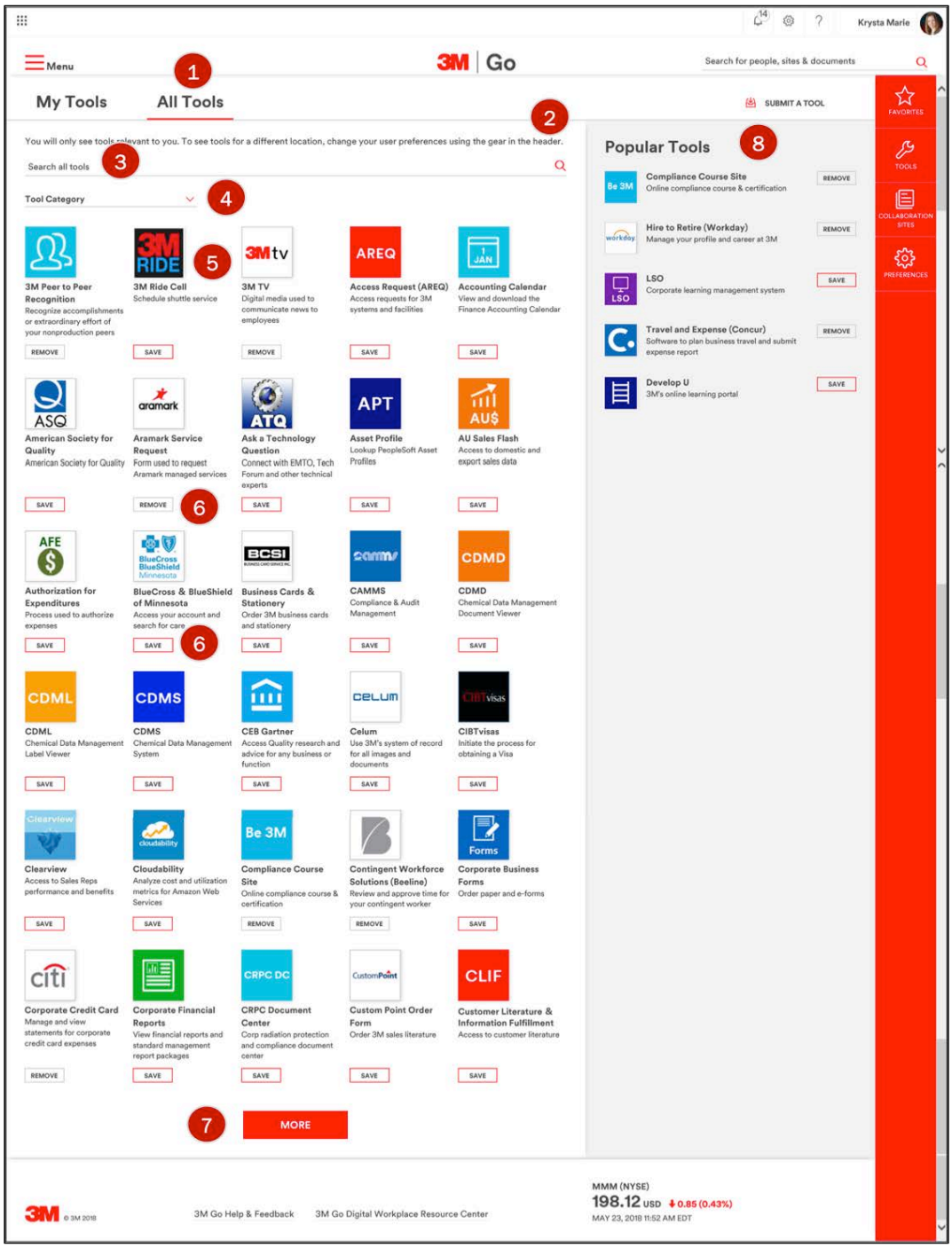


Image 16. 3M Intranet *All Tools*. Users can search for tools and save them on the 3M Go intranet. *16_3M_16_All_Tools_Live.PNG*

Order NNG190115-7904-48466

All Tools, Highlights

Clicking the *All Tools* tab at the top opens a page that displays the many tools relevant to the logged-in user.

1. **All tools:** The *All Tools* tab label indicates that users are no longer looking at their own saved tools, but rather at all available tools at the designated location.
2. **Tip:** Another short tip at the top of the page offers a teaching moment. It tells users that they are seeing only tools assigned to their selected location, and that they can change locations to see more tools.
3. **Search:** Users can use the search field to search by the tool name.
4. **Category:** Users can sort the tools based on various categories.
5. **Tools:** Each tool on the page has a name, description, and icon.
6. **Save or remove:** Below each tool is a button that toggles between two labels: *Save* and *Remove.* Tools that the user has already saved display the option to *Remove*, and tools that have not yet been saved display the option to *Save*. Using one button for the two controls is an elegant, efficient, and space-saving solution.
7. **More:** A large red *More* button leads to more tools.
8. **Popular tools:** The right rail shows the five most popular tools; this helps make users aware of the tools that their colleagues value.

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Toolbar, Collaboration Panel

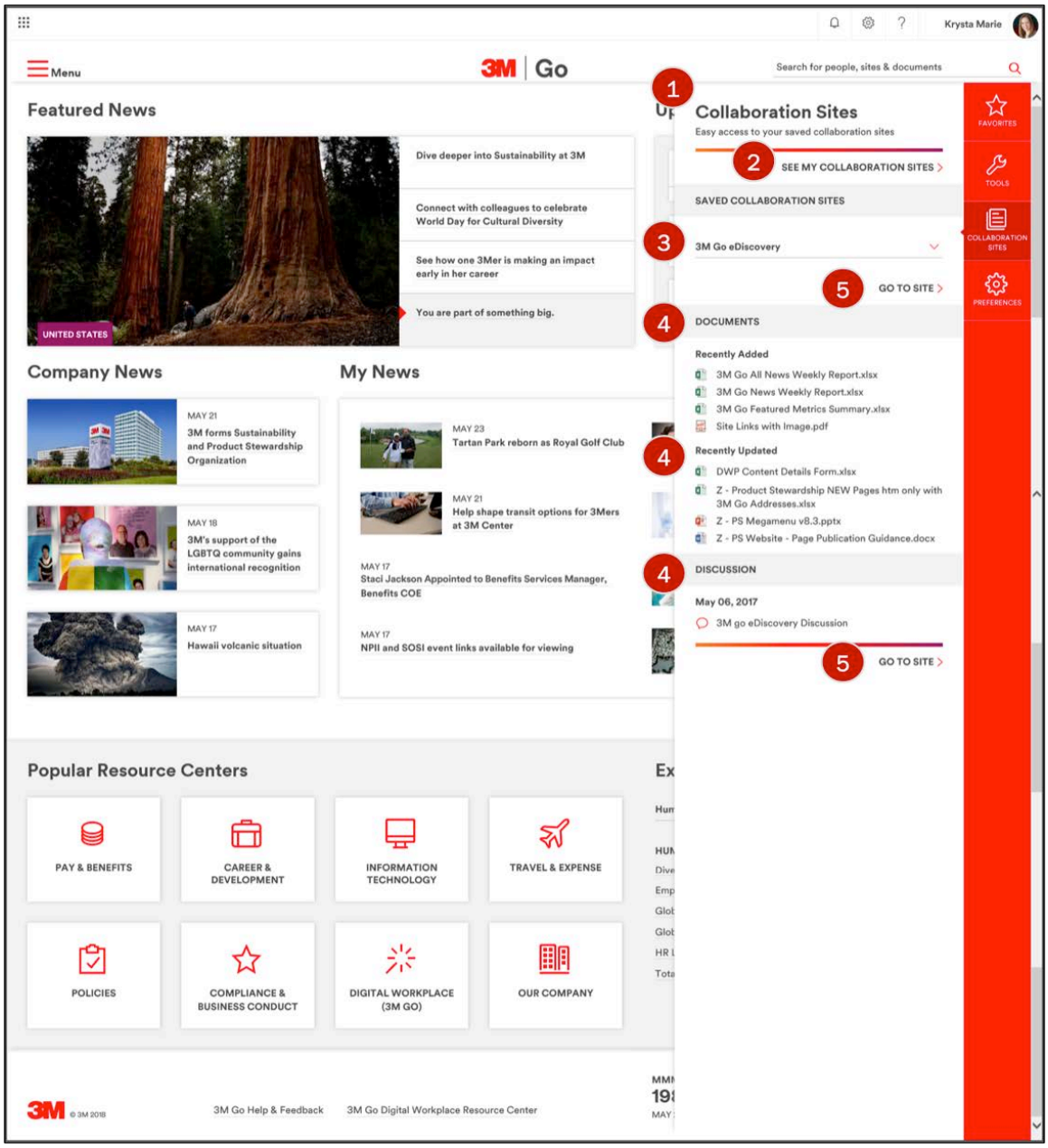


Image 17. 3M Intranet Toolbar Collaboration Panel. Users can access their team and project sites via the *Collaboration Sites* icon in the toolbar on the right. *17_3M_17_Toolbar_Collab_Panel_Live.PNG*

Order NNG190115-7904-48466

Collaboration Sites, Highlights

The third icon on the toolbar is *Collaboration Sites,* which leads to 3M's SharePoint collaboration (team and project) sites.

1. **Accessing sites:** Clicking the *Collaboration Sites* icon in the toolbar opens a panel.
2. **Sites link:** The *See My Collaboration Sites* link opens a list of the user's saved sites.
3. **Drop-down menu of sites:** A drop-down menu offers a list of the user's saved sites.
4. **Site updates:** Clicking a site displays recently added documents, recently updated documents, and recent discussions (if any). It's remarkable that this information appears right in the panel, without users having to visit the collaborating sites to see the recent updates.
5. **Go to site:** The *Go to Site* links (repeated at the bottom of the panel) offer flexibility for users who want to dive in and go to the collaboration space.

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Toolbar, *Preferences*

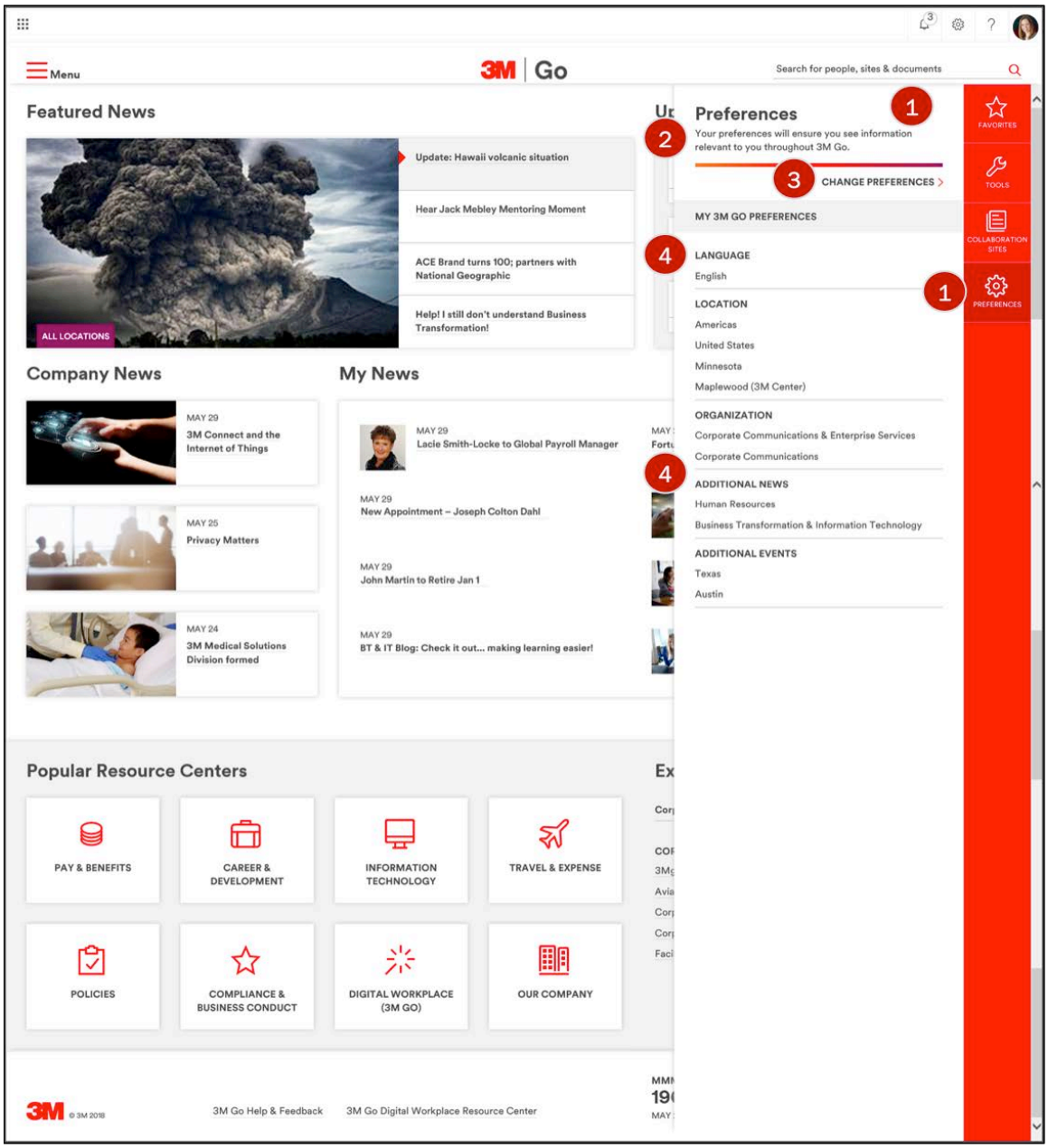


Image 18. 3M Intranet Toolbar *Preferences*. Users can review and edit their 3M Go preferences in the *Preferences* panel.
18_3M_18_Toolbar_Preferences_Live.PNG

Order NNG190115-7904-48466

Preferences, Highlights

3M Go makes it quick and easy for users to review and edit the selections they have made.

1. **Preferences:** Clicking the *Preferences* gear icon in the toolbar opens the *Preferences* panel.
2. **Tip:** Another informative tip reminds users that their customization choices made here resonate throughout their 3M Go experience.
3. **Edit:** Users can edit their preferences by clicking the *Change Preferences* link. Changes take place immediately after the user saves the preferences.
4. **Current selections:** It's easy to review current preference selections in the *Preferences* panel. Each subheading is in bold capital letters that are larger than the selected items, which appear in title case without the bolding. These visual attributes make the text easy to scan.

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Corporate Resource Center Site, Homepage

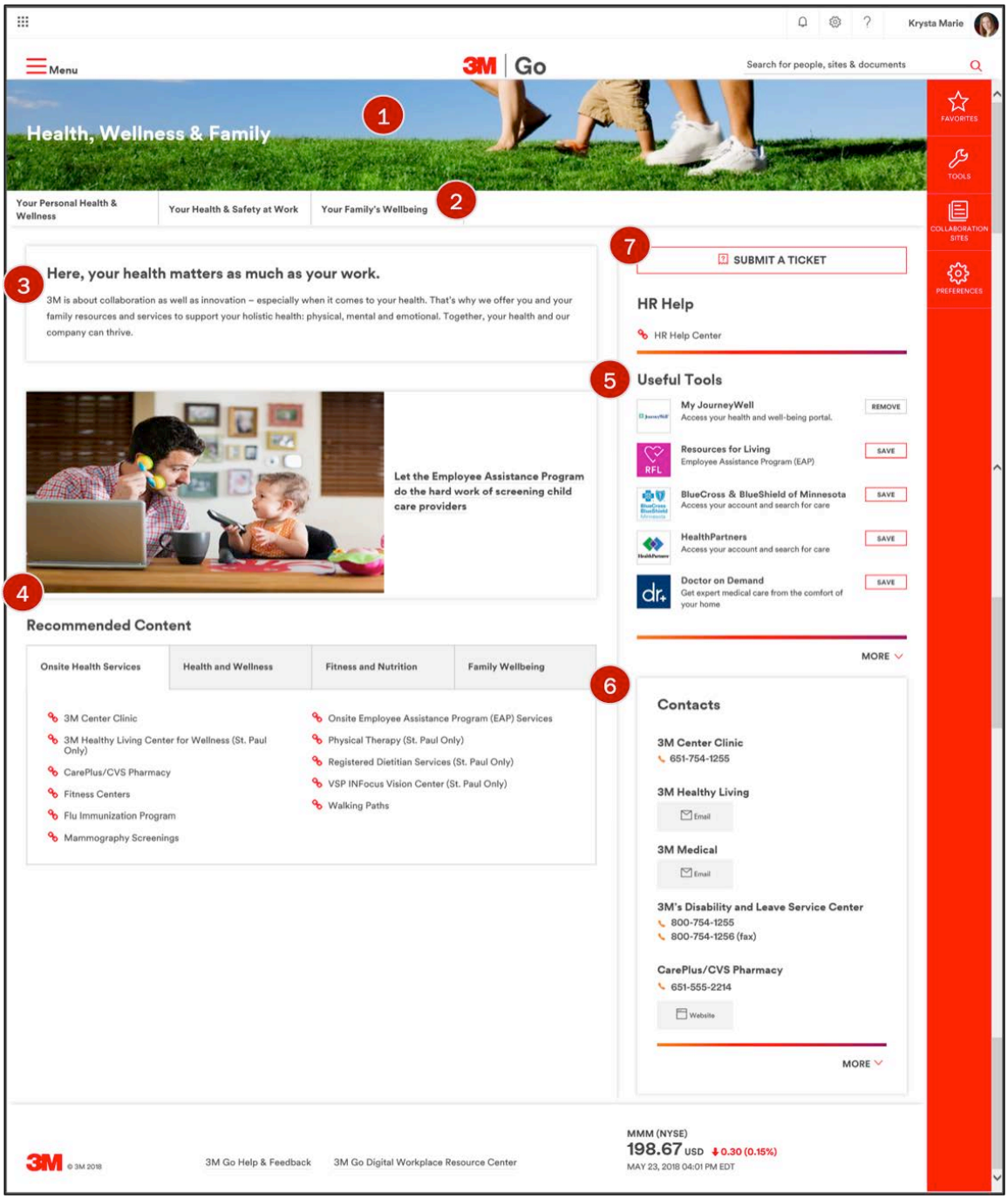


Image 19. 3M Intranet Corporate Resource Center. The *Health, Wellness & Family* section is part of the Corporate Resource Center on the 3M Go intranet. *19_3M_19_Corporate_Resource_Center_Live.PNG*

Order NNG190115-7904-48466

Corporate Resource Center Site Homepage, Highlights

The *Health, Wellness & Family* section, a part of the HR section, is one example of a 3M Go Corporate Resource Center section page. These types of pages offer consistent design and functionality that is used throughout the platform. The most important information is accessible from the section's main page.

1. **Banner:** The banner at the top of the page displays the section title and a related image.
2. **Menu:** Interior pages are accessible from the horizontal navigation that appears below the banner image.
3. **Summary:** A short passage describing the section gives employees a head start in understanding the information before they dig into the details.
4. **Content:** The *Recommended Content* section includes tabs that divide the offered information into meaningful sections: *Onsite Health Services, Health and Wellness, Fitness and Nutrition,* and *Family Wellbeing.*
5. **Tools:** The *Useful Tools* section in the right rail offers a list of related tools along with a button to *Save* (or *Remove,* if the tool was already saved). This lets users easily save relevant tools to their easily accessible toolbar.
6. **Contacts:** The *Contacts* section in the right rail provides key resources, email, and telephone numbers.
7. **Ticket:** When the *Submit a Ticket* button is clicked in this context, it submits a ticket to the HR Help group. A similar button appears on other sites as well, including IT (where it submits a ticket to IT Help) and *Travel* (where it submits a ticket to the Travel center). Text for these buttons is customizable.

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Corporate Resource Center Site, Interior Page

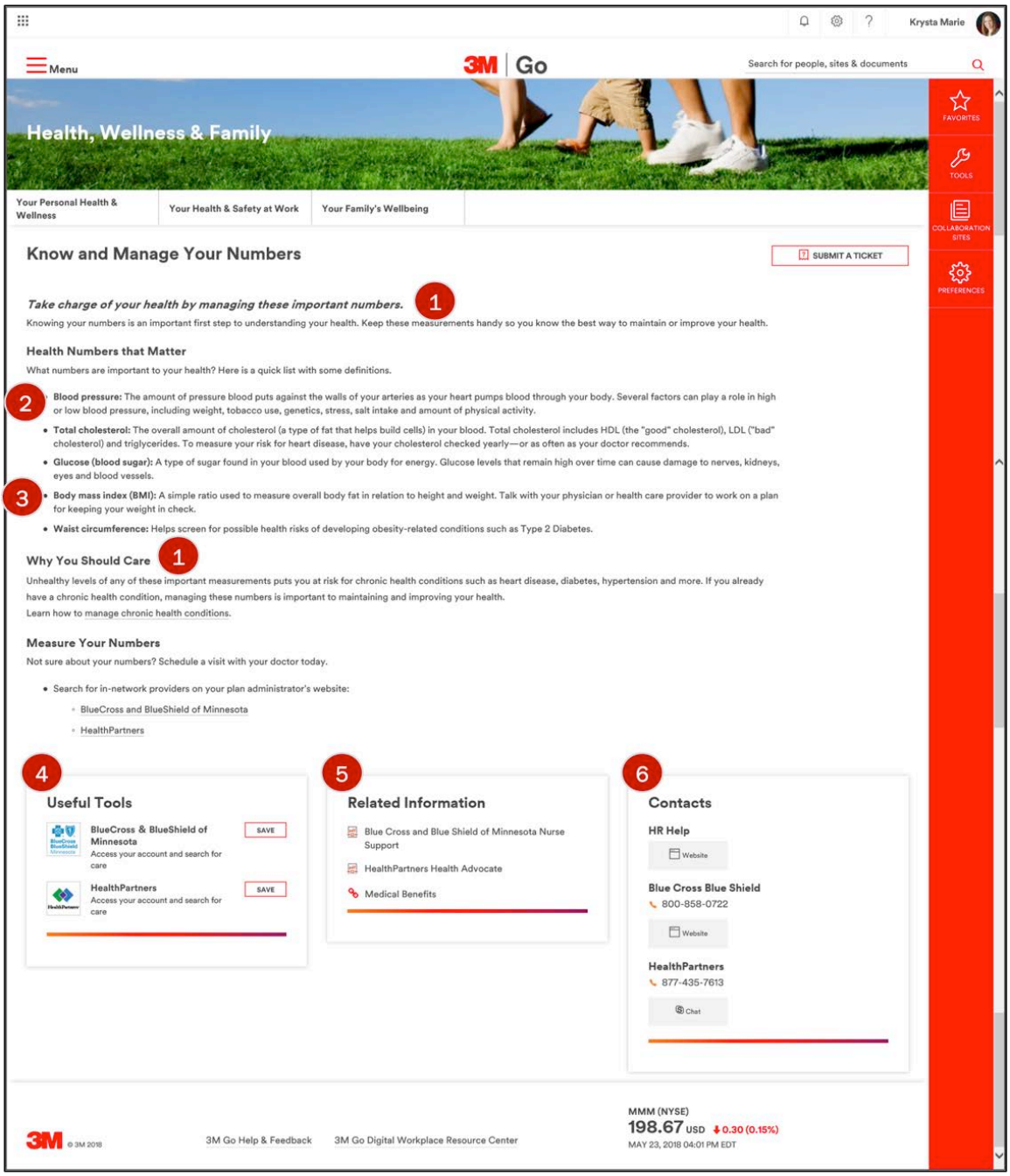


Image 20. 3M Intranet Health & Wellness Section. A page offers detailed health information in the *Health, Wellness & Family* section of 3M Go. *20_3M_20_Corporate_Interior_Live.PNG*

Order NNG190115-7904-48466

Interior Page, Highlights

Consistent elements on 3M Go's interior pages offer a cohesive feel to the interaction, and the text is well formatted for the web.

1. **Hierarchy:** Text size, spacing, and bolding gives subheadings more visual weight than normal text.
2. **Bold:** Using bolding for important, information-bearing words is an effective method for drawing the eye to those words, enabling employees to accumulate pertinent content as they scan the page.
3. **Bullets:** Using bullets is a smart way to chunk content and make it easily digestible.
4. **Tools:** Related tools appear in the *Useful Tools* card at the bottom of the page. Users can click the *Save* button to save them to their tools set in the quick links toolbar.
5. **Related:** The *Related Information* card offers links to other content the reader might be interested in.
6. **Contacts:** Websites, email, phone, and chat options to help users with various health topics appear in the *Contact* card in the lower right of the page.

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Corporate Resource Center Site, 3M Go Mobile

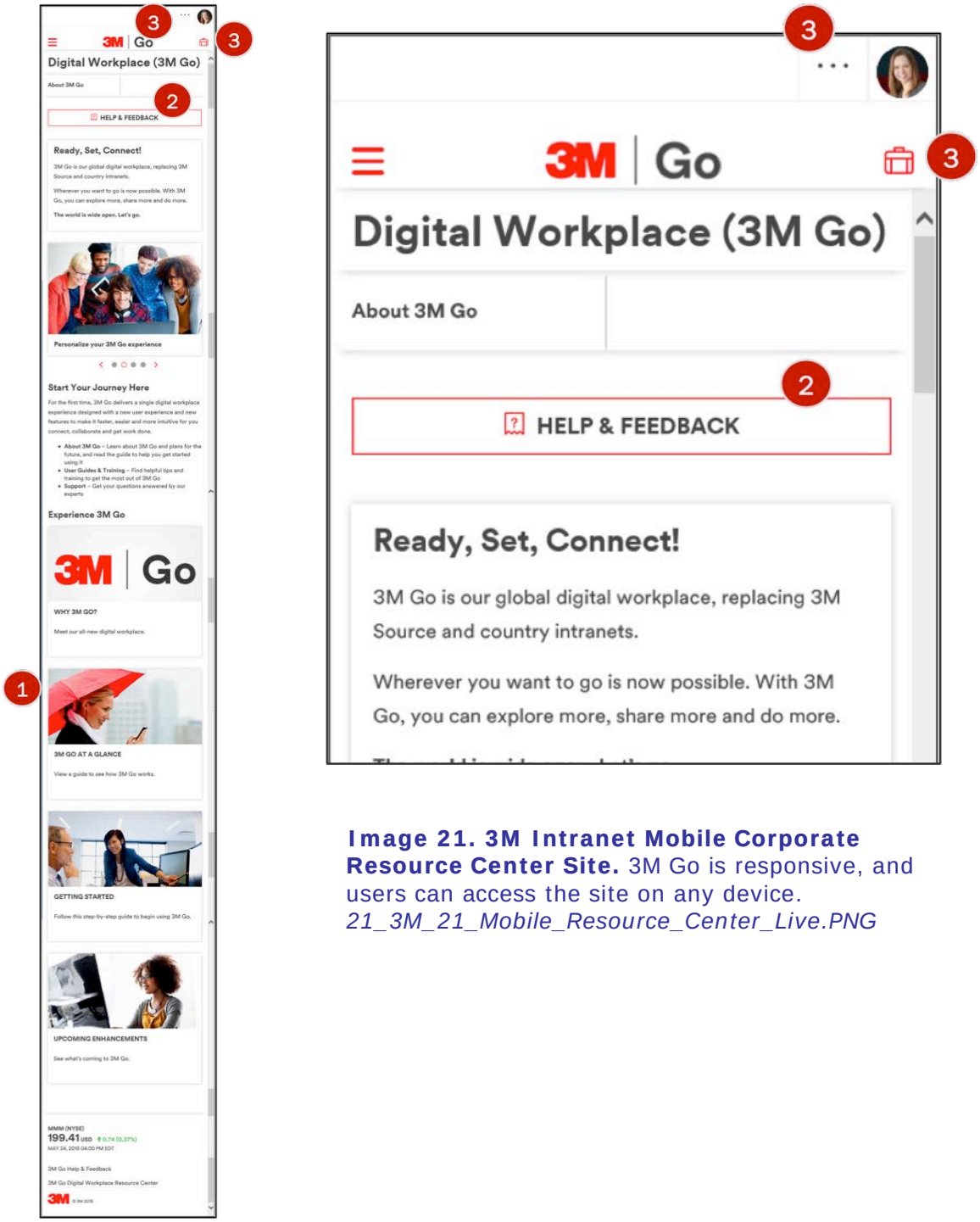


Image 21. 3M Intranet Mobile Corporate Resource Center Site. 3M Go is responsive, and users can access the site on any device. *21_3M_21_Mobile_Resource_Center_Live.PNG*

Order NNG190115-7904-48466

3M Go Mobile, Highlights

The *Digital Workplace (3M Go)* resource center provides user guides and training, and offers access to 3M Go support resources. Because the entire platform is responsive, all 3M Go sites are accessible on any device. The page layout on mobile takes the best advantage of the small screen real estate.

1. **Column drop:** Elements in the right rail drop to the lower sections of the page to make items legible and prevent clutter on the screen.
2. **Wide buttons:** The *Help & Feedback* button is small and appears in the upper right on desktop; on mobile, it takes a top spot and spans the width of the screen to ensure that the button is visible and tappable.
3. **Collapse:** Alerts, settings, and help are collapsed under an ellipse icon to save space. The toolbar collapses under a suitcase icon.

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People Search

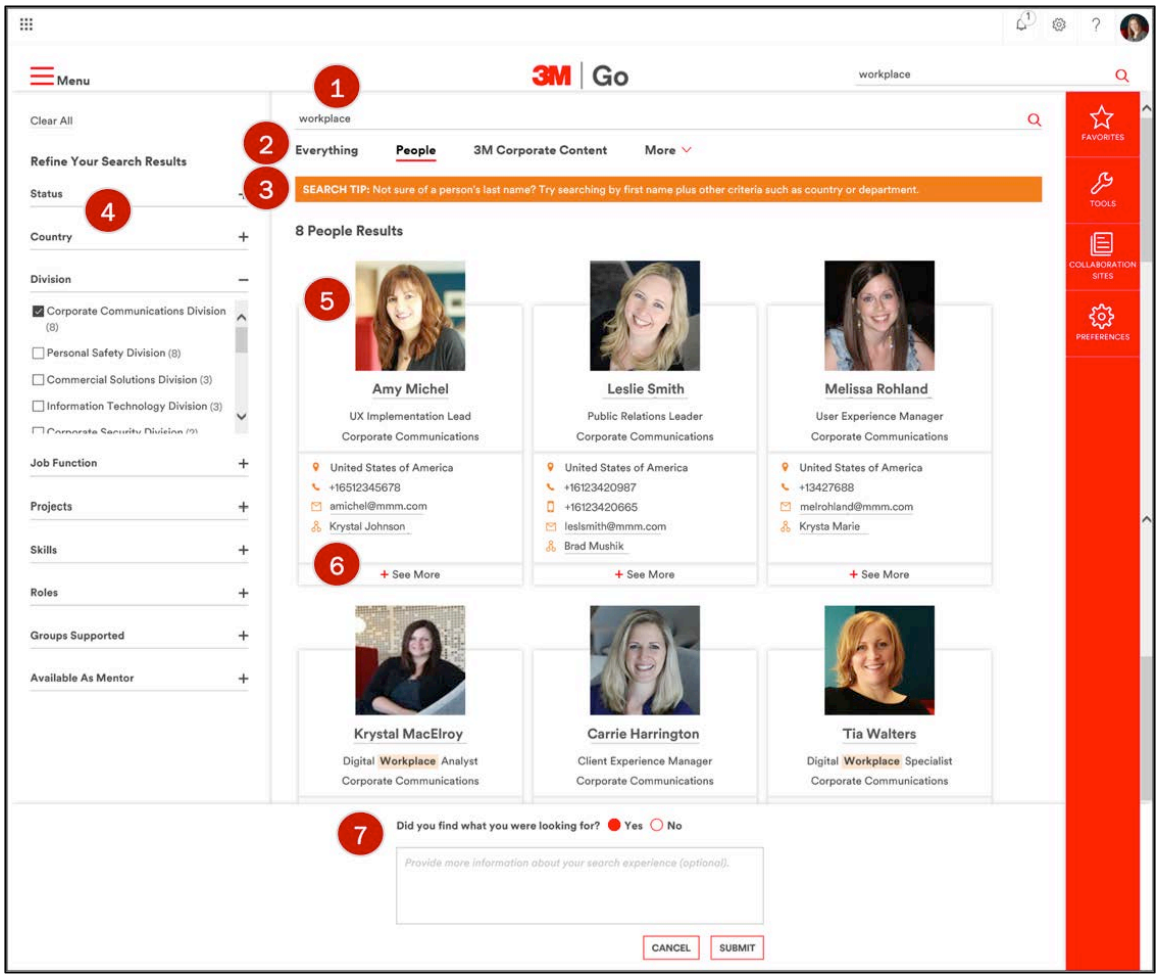


Image 22. 3M Intranet People Search. People search offers various capabilities to search and refine results. *22_3M_22_Search_People_Live.PNG*

Order NNG190115-7904-48466

People Search, Highlights

People search offers plenty of details about employees right on the search engine results page (SERP). Users can give feedback about search results; the intranet team uses that information to continually improve the search function's accuracy.

1. **Query:** Employees can find coworkers by searching on names or other terms. The query remains in the search field to remind users of what they searched for, which is especially helpful if they need to construct a new query.
2. **Search result type tabs:** The SERP shows all results under the *Everything* tab, and people results under the *People* tab. Splitting people search out in its own tab makes it easier for users to find their colleagues.
3. **Tip:** An orange box offers a tip that tells users that they can search by first name, country, or department. This is a pleasant way to help them learn about intranet functionality.
4. **Refine:** Filters and facets appear on the left side and let users refine the results.
5. **People results:** Each result displays the employee's photo, name, title, department, land and mobile phone numbers, email address, and manager.
6. **More:** The *See More* link displays more information in place, while clicking the employee's name or photo leads to that person's Delve profile.
7. **Search feedback:** The question *Did you find what you were looking for?* collects feedback about search results. Selecting either the *Yes* or *No* radio button displays a field where users can share comments.

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Corporate Organization Site (Within 3M)

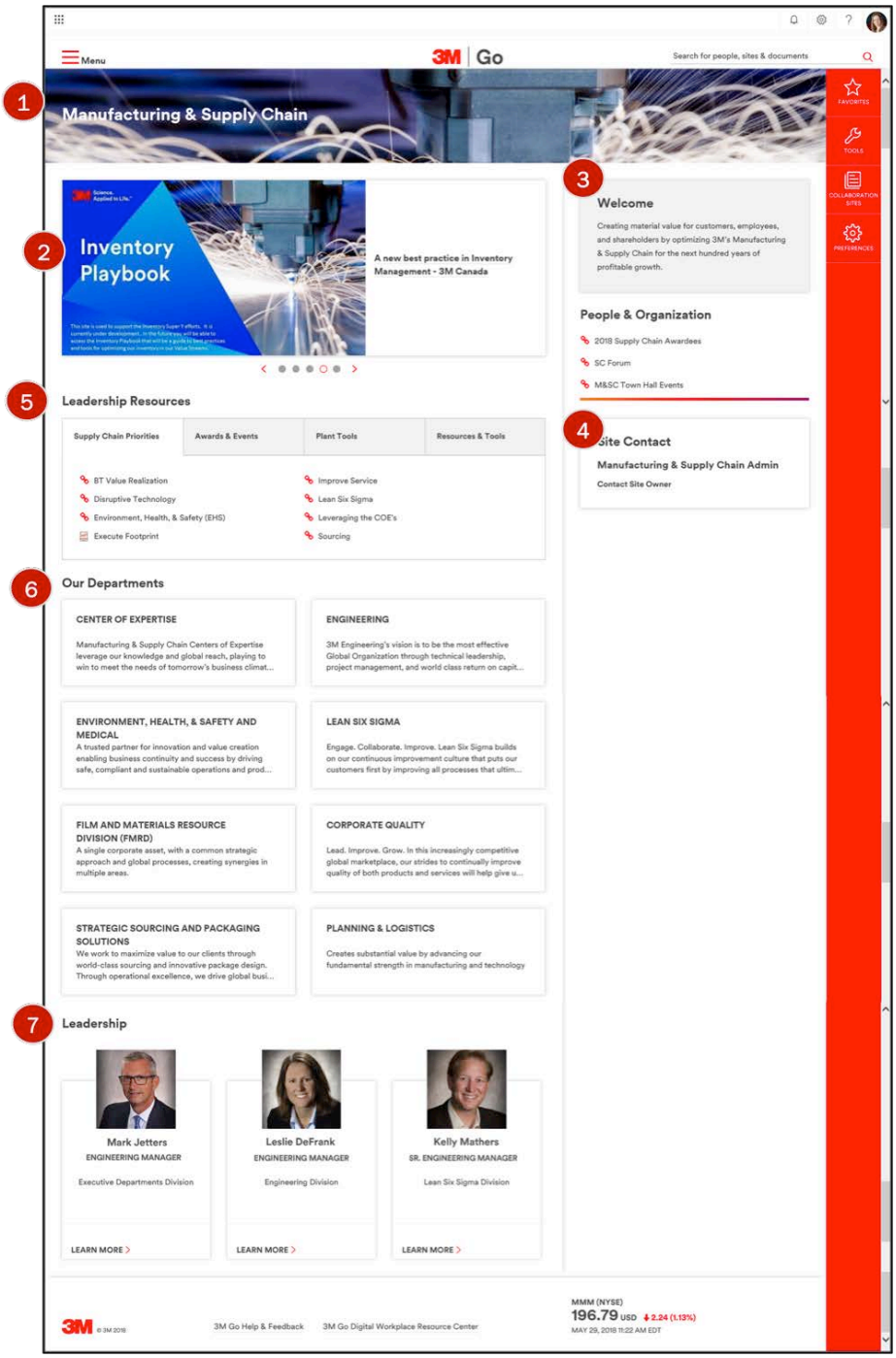


Image 23. 3M Intranet *Manufacturing & Supply Chain* Section. The *Manufacturing & Supply Chain* section provides information about that unit and its resources. *23_3M_23_Corporate_Org_Site_Live.PNG*

Order NNG190115-7904-48466

Corporate Organization Site, Highlights

All corporate organization sites on 3M Go provide information about the organization (within 3M), along with its key resources and leadership. These corporate sections all feature a consistent design; some page elements are optional to best meet each section owner's goals. The site's *Manufacturing & Supply Chain* section shown above is an example of a corporate section.

1. **Header:** The page header includes the organization name and a related image.
2. **Carousel of key points:** A few key points and related images appear in a carousel at the top of the page.
3. **Welcome:** A short *Welcome* message in the right rail explains what the organization does.
4. **Contact:** A link to the site owner's contact information lets employees get in touch if they have issues with the content.
5. **Resources:** Links to key *Leadership Resources* appear in a four-tabbed section.
6. **Departments:** Each department within the organization is listed in *Our Departments*, along with a summary of its mission. This is a great way to familiarize employees with the organization's structure.
7. **Leaders:** The *Leadership* section includes the name, title, division, and a photo of division leaders. This helps new employees get familiar with the leadership team members.

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Tour

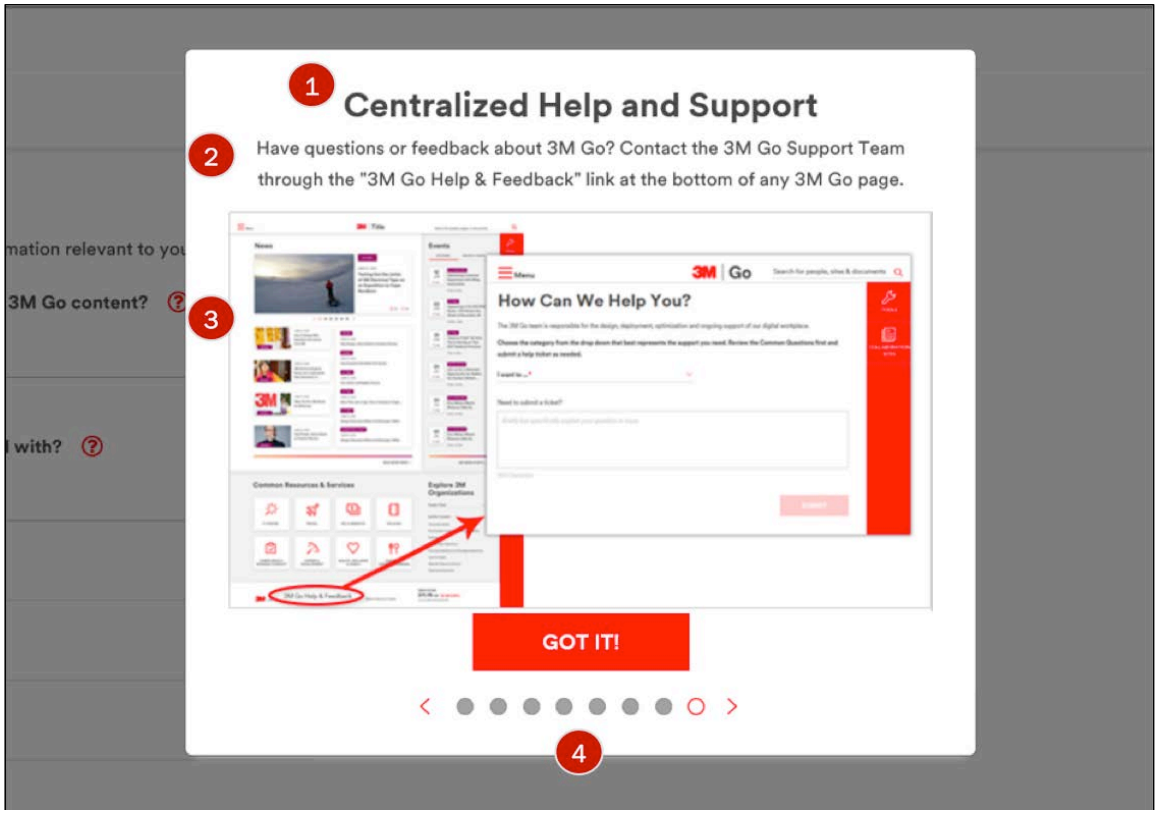


Image 24. 3M Intranet Tour. A helpful tour through 3M Go features can help users get started with the new system. *24_3M_24_Extra_Intro_Tour_Live.PNG*

Tour, Highlights

Users new to 3M Go get helpful training by taking the site tour.

1. **Topic:** A large headline summarizes the intranet feature being described.
2. **Description:** Below the title is a concise explanation of the feature. Having words and visuals on the same page supports different ways of learning.
3. **Screenshots:** Screenshots, zoomed-in images, and annotations help users identify the UI element that the tour is referencing.
4. **Progress:** Dots and arrows at the bottom of the lightbox display progress and allow users to go backward and forward.

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DESIGN PROCESS AND USABILITY WORK

Research Phase

The initial three-month research phase consisted of one-on-one and group interview sessions, focus groups, workshops, a digital workplace survey, a communications survey, and benchmarking with more than 15 companies. This phase provided clear insights for the team to use as a jumping off point for its work.

This research helped the team more clearly understand the existing 3M Source intranet's gaps:

- Most users felt that 3M Source was **disorganized and difficult to navigate**. They relied on search to find content, but had little confidence in the relevance of the search tool's output.
- Users often published content where they were most comfortable—not necessarily where it made the most sense. When it came to knowledge sharing, there were **no rules and standards**.
- 3M Source was not considered a communication platform. Although users felt that **too much communication happened via email**, there wasn't a better way to reach their desired audiences. Further, despite the high volume of email, **employees were not getting all of the communications they wanted and needed**.
- Users felt that the site had too many tools and it was not always clear how the tools should be used. As a result, it was **difficult to keep track of sites and tools** they needed for daily work.
- Users relied on personal connections to find important contacts, which made life difficult for new employees. Not surprisingly, ***Workforce Directory*** **(people search) was one of the most valuable tools on 3M Source**.

More than 4,500 employees and communicators globally participated and provided feedback. They were clear about which features and functionality that they felt were essential for a new platform to make their day-to-day work more productive. Representative comments include:

- *Allow me to stay connected through personalized news, events, and content that are relevant to me.*
- *Make it easy to find the information I need through consistent design, dependable search, and intuitive navigation.*
- *Give me quick access to the tools (applications and systems) that I use on a regular basis, on all devices.*
- *Provide me with a robust people search so that I can find people based on criteria other than name.*
- *Deliver a solution where I can save my SharePoint collaboration sites centrally instead of having to bookmark them in my browser.*

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Design Phase

Based on the global research results, sketches were created to illustrate the intended UX. After several rounds of revisions, the team landed on a vision and concept for the new digital workplace. From there, it detailed the needed functionality and created annotated wireframes. Each concept was meticulously evaluated through multiple rounds of feedback and usability sessions with employees globally to ensure the new intranet would meet user needs.

Once the team determined the functionality and web parts, it created design comps. The design approach reflected a simple, clean, and modern visual design for the new platform, and leveraged the 3M brand guidelines using a complementary color palette. The team documented the use of colors, fonts, and spacing for all design elements in a detailed style guide.

Throughout the design process, the team identified foundational elements to personalize and customize the UX:

- An ever-present, quick-access toolbar would let users easily access and customize their favorites, tools, collaboration sites, and preferences.
- Using a content-targeting approach, the system would display only relevant content to users by matching content metadata to user-chosen preferences for location, language, and organization.
- News and events content would be centrally located on the homepage and be displayed based on user preferences.
- Delve was established as the employee profile for the new platform. The tool already contained information from HR (via a daily feed), and also provided additional fields that users could complete to further enhance people search functionality.
- The site needed a single search experience for people, sites, and content. Knowing the importance of the search feature, the team opted to customize the search query to display only relevant content based on the user's language and location preferences.

While the design focus was strongly based on the employee experience, the team also wanted a positive experience for content owners, content editors, and communicators. Because the previous platform had required technical resources to update content, it was extremely important to the team to give users a simple, intuitive way to create and maintain content on the new site.

To create content on the new platform, content owners can simply choose the layout for their page from a set of nine custom templates, then add content, provide metadata, and save it. To create news and events, communicators can submit their own stories by filling out a simple form, adding content, and routing the story for approval via workflow.

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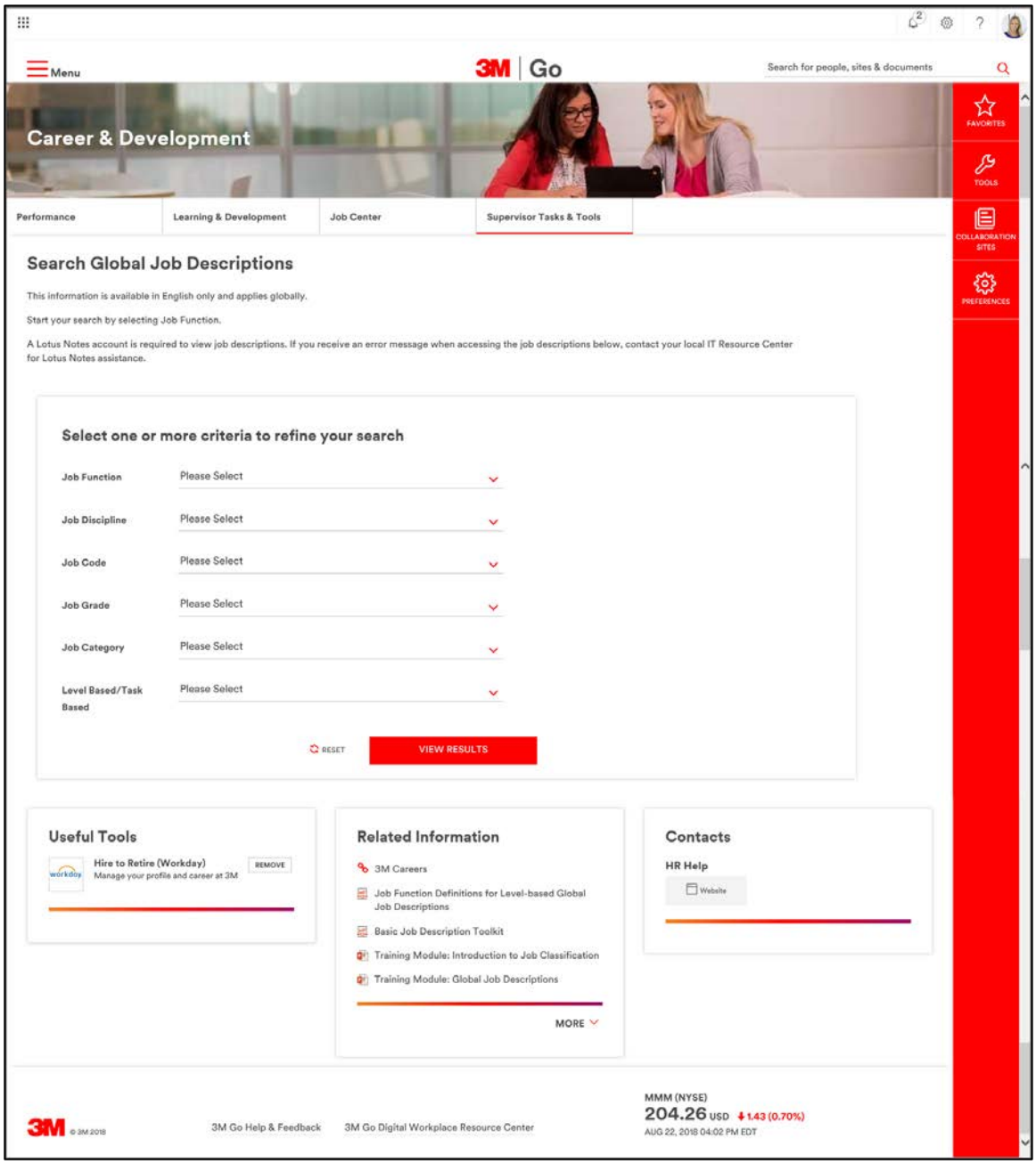


Image 25. 3M Intranet Interior Page Selector Layout. One of the interior page layouts is a selector tool that helps users easily find content or information based on specific criteria.
25_3M_25_Corporate_Interior_Selector_Live.PNG

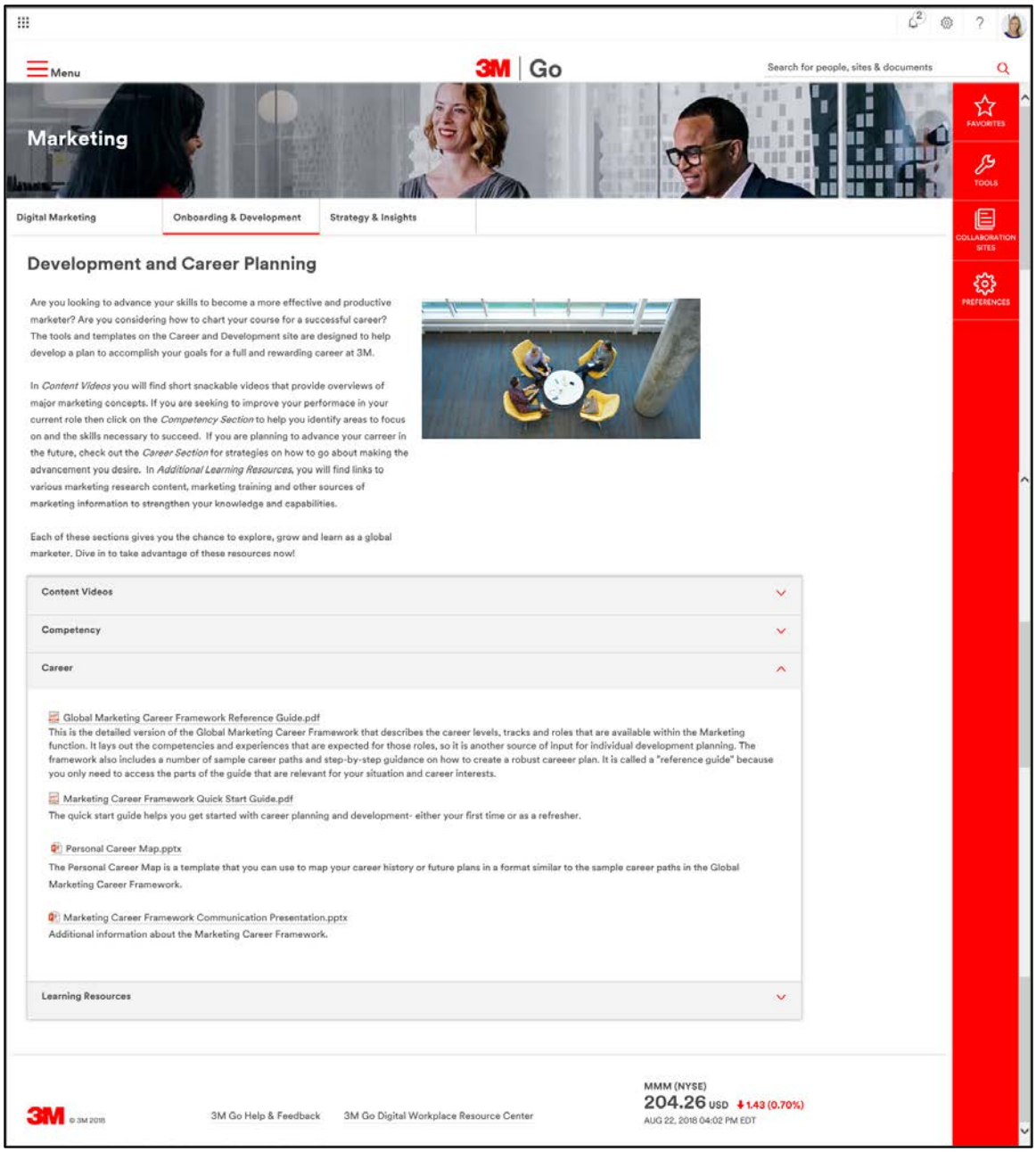


Image 26. 3M Intranet Interior Page Accordion Layout. The accordion layout lets page creators group content together into sections. Users can then simply click on a section to expand it.
26_3M_26_Corporate_Interior_Accordion_Live.PNG

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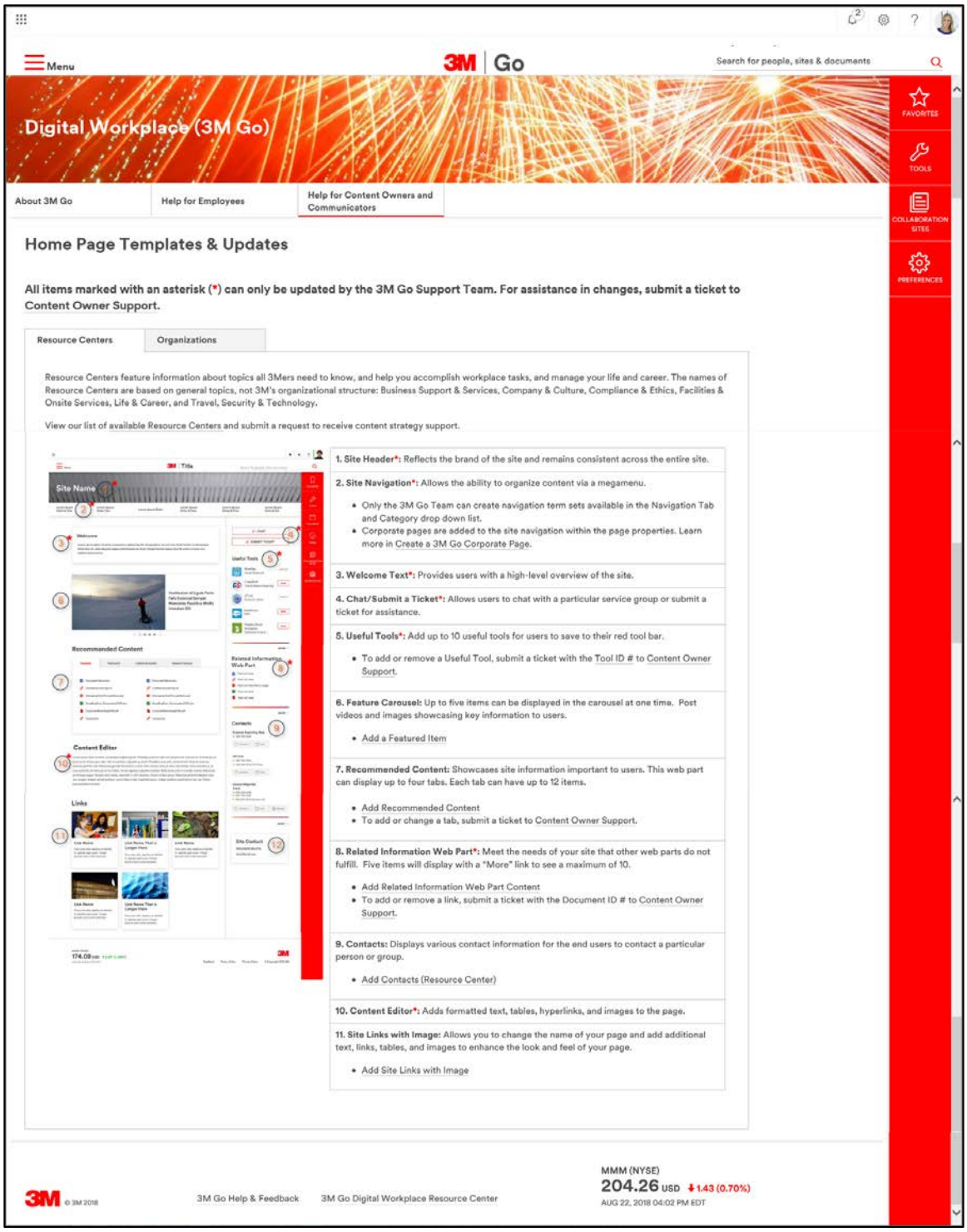


Image 27. 3M Intranet Interior Page Tab Layout. The tab layout allows page creators to break up a large amount of content into categories within tabs. *27_3M_27_Corporate_Interior_Tab_Live.PNG*

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Soft Launch

Two weeks prior to the official go-live, the team conducted a soft launch with a group of approximately 7,600 employees in select 3M organizations—including HR and IT—whose jobs ranged from administrative assistants to global communicators and site owners. The purpose of the soft launch was to stress test the environment for performance and identify any showstopper issues prior to the official global launch. This also helped with initial adoption and buy-in, because these early users created excitement for the launch.

During the two-week soft launch, 5,100 unique users participated (more than 67% of the group), resulting in 10,000 sessions and 68,000 page views. Only minimal issues were identified and only 200 tickets reported, but the icing on the cake was the glowing feedback the team received, such as: *"The site is overall very well organized and easy to navigate. I had several things to look up this morning, and I was able to find everything I needed about 5x faster than when using 3M Source!"* and *"It looks awesome from my mobile phone!"*

Post-Launch Activities

After launch, the team started a monthly 3M Go email newsletter with updates and tips & tricks, which continues to be sent to all 3M employees globally. The team also created a new *Get to Know 3M Go* web part on the homepage, which highlights tips and tricks related to a new topic each week.

Perhaps most important—and most effective for increased adoption—is the fact that the intranet team listens to its users. The team asks for and responds to continuous feedback through channels such as help and feedback tickets, surveys, polls, and group feedback sessions. In addition, team members actively engage employees in usability sessions to ensure that they are still making the right changes. A global network of volunteers provides ongoing feedback and input on upcoming enhancements and the intranet roadmap. Team members publish news stories to let employees know "we heard you" and share the continuous enhancements that they are making to 3M Go.

As of the one-year anniversary of 3M Go (August 8, 2018), the team had pushed out more than 140 enhancements. On the one-year anniversary, it also hosted an anniversary party of sorts—a small event where team members handed out branded 3M Go cookies and flyers that featured "top things you need to know." They also encouraged employees to provide feedback on enhancements that they would like to see made in year two.

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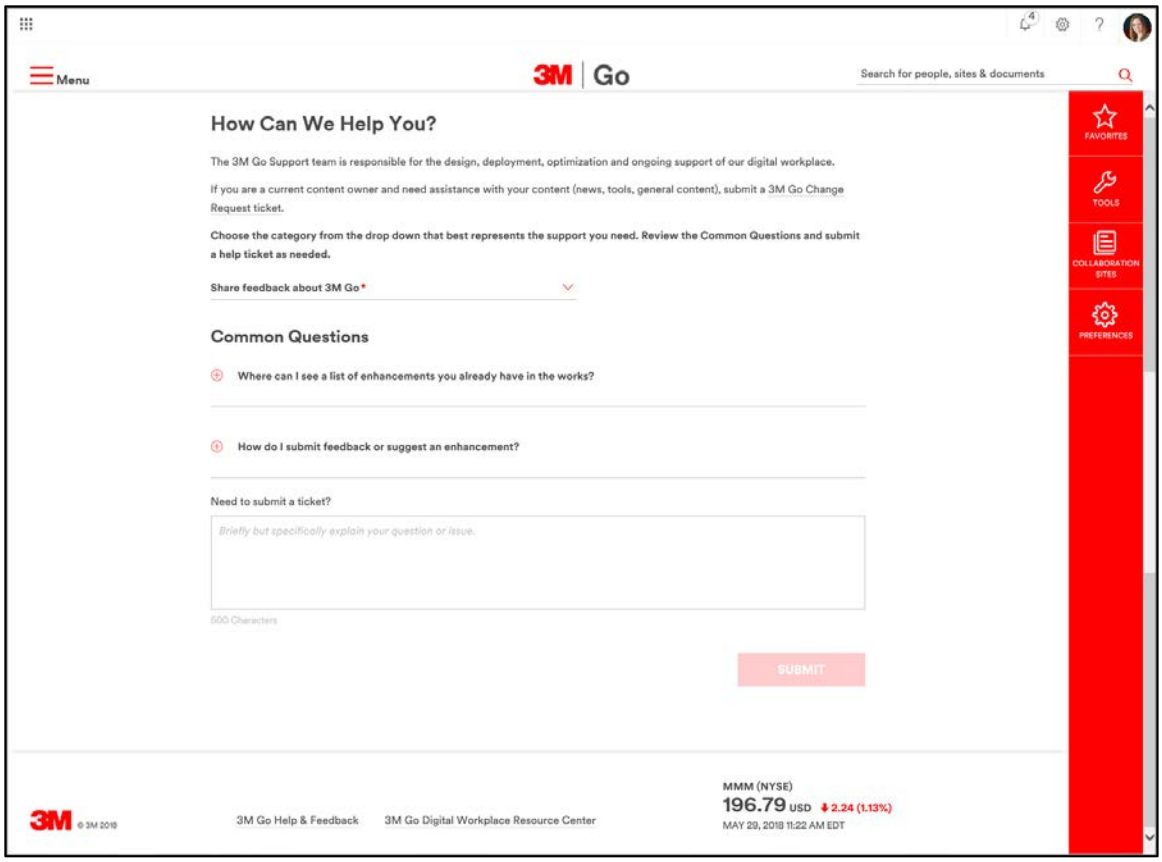


Image 28. 3M Intranet *Help & Feedback* Page. The *Help & Feedback* page is accessible from the footer at all times. Here, users can find answers to common questions (displayed based on the drop-down category selection), as well as submit help tickets directly to the Digital Workplace team. *28_3M_28_3M_Go_Help_Feedback_Live.PNG*

Information Architecture

To provide a framework and structure for the new platform, sites were separated into three types: Core, Corporate, and Collaboration.

- **Core sites** include the homepage and supporting pages for search, news, events, and the quick-access toolbar.
- **Corporate sites** consist of official 3M organization sites (based on 3M's corporate organizational structure) and topic-based Resource Center sites for general information and resources. Corporate sites are accessible from the menu in the header and from custom web parts on the homepage. Tree jack studies and usability sessions helped the team determine the organization of corporate sites within the menu. The Digital Workplace team governs both Core and Corporate sites.

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- **Collaboration sites** (self-service SharePoint team sites) are accessible from the quick-access toolbar so that users can customize which sites to save. Collaboration site templates and the process to request a new site was already owned by the IT organization.

ADOPTION AND BUY-IN

Launch Campaign

The launch campaign was multipronged, using a variety of techniques to reach out to employees internationally and highlight new intranet features and how those features would serve employees. The launch campaign continued for months before go-live, with an in-person roadshow presented to nearly every department and division within 3M to build awareness and knowledge about the new platform. The materials created for the campaign were engaging and compelling. The team also encouraged site owners to promote 3M Go and help make people aware of where to find their site content on the new platform.

Launch campaign events included:

- **Naming contest:** The launch campaign started with a naming contest that received more than 1,500 unique ideas from employees around the world. After narrowing the options, the team vetted the choices with legal and presented a poll to employees so they could choose their favorite from the short list. 3M Go was the clear winner.
- **Roadshow:** The roadshow was a presentation given to employees at Town Hall events (which include all employees within a department or division) or other communication meetings. The Communications team showed a short video to generate excitement for the new experience, and then gave a PowerPoint presentation. During these events, the team described the research approach and findings and discussed how 3M Go would address these top employee needs. Each presentation was customized to the audience (either a business or staff group organization) to show how the new site would benefit them specifically, and also to give credit to their content owners where appropriate. The video and presentation deck were also provided to global partners for use locally.
- **Themed digital boards:** Digital boards and banners were displayed across the 3M campus to highlight key intranet features such as search, navigation, access to collaboration tools and content, multiple languages, and mobile capabilities.
- **Desk drop:** A week before go-live, all employees at the 3M Global Headquarters location received a desk drop—a printed handout on thick card stock—in addition to a global prelaunch email introducing 3M Go.

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- **Launch day email:** On launch day, all employees globally received an email letting them know that 3M Go was ready and available. Digital Workplace team members, dubbed "3M Go Pros" dressed in 3M Go t-shirts and were stationed at hubs around the 3M Global Headquarters campus to hand out branded giveaways such as laptop stickers and USB car chargers, as well as to offer one-on-one support and answer questions.

  All launch campaign materials were also provided to international site and content owners to promote 3M Go within the country locations. Several countries conducted similar activities for launch, and one country went even further, creating and distributing 3M Go mouse pads.

- **Intro tour:** To help further educate employees about 3M Go functionality, the team created an Intro Tour that was displayed when users accessed the site for the first time via single sign-on. Also, news stories on the 3M Go homepage and information in the 3M Go Resource Center site introduced new functionality to users.

The launch campaign was well designed to provide engaging and compelling materials. Taking the time to invest in awareness and change management efforts prior to launch helped to educate employees and make the launch a huge success.

Working with Outside Agencies

With in-house expertise in project management, content strategy, and communications, the internal team leveraged several different agencies for research, design, and launch materials for the new global digital workplace: DMI conducted global research and initial concept, Rightpoint completed the design and usability activities, and Shinebox created the launch campaign materials.

The primary project partner for design was Rightpoint, a digital experience agency headquartered in Chicago, Illinois. Collaboration with its group of UX, design, and technical experts helped the internal project team refine its initial concept and bring it to life.

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WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
DMI	• Conducted global research and initial concept
Rightpoint	• Handled design and usability
Shinebox	• Created launch campaign materials

GOVERNANCE

Ownership

The 3M (Corporate) Communications team owns the global intranet, which has had a positive effect on platform health. The Communications team has all of the resources it needs to lead the business side, and it maintains a strong partnership and governance board with IT for platform capabilities and development activities to improve the intranet going forward.

Establishing Governance

During the design phase, a Digital Workplace Governance Review Board was established both to ensure that business and IT were aligned on key decisions and to create a positive and consistent UX. The HR Communications team owned the UX, but IT owned the platform, so it was important that they work closely together.

Together these teams defined and documented the purpose and scope of the Governance Review Board and also the roles and responsibilities of its members. The board makes strategic decisions about the UX, standards, types of sites (Core, Corporate, and Collaboration), security and access levels, IA, the use of Microsoft technology, and much more. And the board continues to be extremely effective in ensuring that the business and IT organizations stay aligned and connected.

The board meets on a monthly basis, or more often as needed. It is a cross-functional board, with representation from various areas of IT and Corporate Communications. Each of the eight team members (three in Communications and five in IT), play a specific role as follows:

- **Digital Workplace Manager** (Corporate Communications): manages the Digital Workplace team and is responsible for leading the Governance Review Board, determining its agenda, facilitating meetings, providing detailed meeting notes, and following up on action items.
- **Content Strategy and Support Manager** (Corporate Communications): represents site and content owners and escalates site-level governance decisions as needed.
- **User Experience & Analytics Manager** (Corporate Communications): represents the global employee audience and presents updates on upcoming 3M Go priorities and enhancements.

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- **IT Applications IT Manager:** responsible for technical resources and mobile access of 3M Go and helps to break down barriers and communicate with IT executive sponsors as needed.
- **Digital Workplace IT Manager:** directly manages the 3M Go technical team and is responsible for bringing technical-, system-, and interface-related items to the team, as well as for providing addition to updates regarding technical resources.
- **IT Collaboration Manager**: owns the O365 platform and is responsible for strategic decisions about use of O365 tools and functionality; also provides details and updates regarding IT projects underway that may impact 3M Go.
- **IT Architect:** provides technical expertise regarding O365 and SharePoint platform, provides possible solutions to technical or platform-level issues, and serves as a connection to the Microsoft team.
- **IT Specialist:** an O365 expert who provides Microsoft roadmap updates and information about upcoming O365 features and functionality.

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3M INTRANET RESPONSIBILITIES	
Role	**Responsibilities**
Digital Workplace Solutions Team	• Manage intranet strategy and roadmap, UX, design, site- and platform-level governance, content strategy, metrics and analytics, site administration, training, communication, and education to increase employee adoption • Provide help and support for employees, site owners, content editors, and communicators • Manage design and business requirements for enhancements, and oversees 3M Go global deployment (adding local country content to 3M Go and eliminating off-platform intranets)
IT Area Leads	• Identify country resources for 3M Go global adoption and deployment project • Report progress to management and keep project team on track
Communicators	• Publish country-specific news and events (global and US news and events are managed and approved centrally, while communicators are located in each country)
Site Owners	• Act as the primary point of contact for content owners on organization sites (the Digital Workplace team owns Resource Center sites) • Identify content that belongs on their organization site • Ensure that the site remains up-to-date and that content is relevant to users
Content Owners	• Publish content and ensure that it remains up-to-date
Content Editors	• Make updates on behalf of content owners as needed (most content owners update their content themselves)

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Run-State Governance

The post-launch run-state intranet business team consists of the following full-time 3M employees. This list does not include site owners, content owners/editors, communicators, or any contract workers or managed services resources.

RUN-STATE INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Digital Workplace Manager	• Provides management and leadership for Digital Workplace Solutions team, which consists of global intranet and email management • Develops strategy and roadmap for 3M internal communications channels and technology • Provides resources, support, and funding model for digital communication solutions • Leads governance and change review boards for 3M Go • Manages 3M Go global adoption/deployment program • Works with Microsoft for strategy and roadmap
UX & Analytics Manager	• Leads 3M Go UX & Analytics team • Partners with IT Manager to implement enhancements to 3M Go • Conducts 3M Go usability activities and collects feedback • Determines UX for ongoing changes • Provides business requirements and design for enhancements • Leads ongoing communication and adoption tactics, including overseeing monthly 3M Go newsletter communications to employees globally • Provides metrics and analytics as needed

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UX Implementation Lead	• Leads prioritization sessions for enhancements and bugs with business leads • Works with technical team for business and technical requirements and provides clarifications as needed • Acts as product-owner proxy • Conducts user acceptance testing
Content Strategy & Support Manager	• Leads Support and Content Strategy team • Manages site-level governance • Provides support, communications, and updates to communicators, site owners, and content owners • Leads content strategy activities; guides content owners as needed • Ensures that team provides thorough training materials to employees, communicators, site owners, and content owners
Content Strategist	• Provides content strategy expertise for organizing content on 3M Go sites • Supports communicators, site owners, and content owners • Provides employee support (help and feedback tickets) as time allows • Completes site administration activities (web part configuration) as needed • Assists countries in mapping local content from previous intranet systems to 3M Go
Support Analyst	• Supports employees by responding to help and feedback, and *Did you find what you were looking for?* search feedback questions • Analyzes responses to the feedback and questions to determine key themes • Partners with other Digital Workplace teams to determine communications and training opportunities and provide feedback into the prioritization of enhancements and bugs • Updates and creates new training materials as needed

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Global Adoption Project Lead	• Leads the deployment of 3M Go globally • Provides project management expertise • Leads countries, one by one, through a detailed deployment process to evaluate 3M Go functionality, add content to 3M Go, and launch • Provides training to country communicators and content owners
IT Manager	• Serves as Scrum master and manager of development resources

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	**Full URL:** https://skydrive3m.sharepoint.com/sites/Go/Pages/Home.aspx **Short URL:** go.3M.com/home
Default Status	3M Go is each user's homepage. Users can override this setting, and the site is not bookmarked in users' browsers.
Remote Access	The intranet can be accessed from home with VPN access or from any mobile device with Intune device management.
Kiosks	Plant employees, who are not typically at computers during the day, access the site via centrally located kiosks.

TIMELINE

The Global Digital Workplace project officially started at the end of July 2015. The project took two years to complete from start to finish, ending with a soft launch in July 2017 and an official global go-live on August 8, 2017. Overall, the team spent three months on research, 10 months on design, 17 months on development, 18 months on content evaluation and cleanup, and 10 months on site/content build, with many phases and activities happening simultaneously.

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PROJECT MILESTONES	
Milestone Date	**Milestone Description**
July 2015	• Started project to create a new global digital workplace for 3M
July–Sept 2015	• Conducted global research with employees and communicators
October 2015–February 2016	• Designed and determined functionality for Corporate (organization and resource center) sites • Established custom location and language logic • Engaged site and content owners
March–December 2016	• Developed and tested Corporate sites
May–September 2016	• Designed and determined functionality for Core sites (home page, news, events, toolbar, search)
September 2016–June 2017	• Built and configured Corporate sites • Created Corporate site content on new platform
January–July 2017	• Developed and tested Core sites
March–July 2017	• Built and configured Core sites • Created Core site content (such as news and events) on new platform
July 2017	• Soft launch
August 2017	• Official go-live of 3M Go
Overall redesign timeframe: 2 years	

CONTENT AND CONTENT CONTRIBUTORS

A Commitment to Quality

Concurrent with the research and design phases, the team engaged hundreds of site and content owners to evaluate and cleanup existing content and prepare to rebuild on the new platform.

A dedicated 3M content strategy team worked with 300 content owners to determine which sites needed to be created and how the content would be organized. The content strategy team's purpose was to ensure that clients (content owners) understood how their content fit in the broader 3M Go structure, as well as to train

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clients on content creation and maintenance. The team consisted of a supervisor and eight contract workers: four content strategists and four content editors (for non-HR content; a separate team handled HR content). The team for non-HR content leveraged metrics, mock-ups, and card-sorting activities along with continuous user feedback to design the Corporate sites' layout and organization approach.

Content owners self-identified based on their need to publish content they own on the new platform. Because the previous intranet site had a cumbersome structure and was difficult to use, content owners had a vested interest in a newly redesigned digital workplace and were engaged throughout the process. The team held monthly content-owner meetings to capture feedback and provide project updates; such meetings were in addition to the many individual working sessions aimed at helping the design team understand the content structure, conduct content strategy activities, and train owners on how to create content. Updating 3M Go is a small part of most content owners' overall responsibilities; therefore, it's critical to offer an easy-to-use platform, as well as ongoing support and training as needed.

The team put significant effort into creating nearly 150 visual step-by-step guides and training documents for employees, site administrators, site owners, content owners/editors, and communicators. Although the team held many in-person and video demonstrations of functionality, it relied heavily on self-service guides to help the thousands of site users globally.

Content Governance

The content strategy team drives content management governance, which ensures that all content has an identified owner to keep it updated. To reinforce this commitment, prior to go-live, content that lacked an identified owner was not moved into the new platform. Also, the team established an automated 18-month review cycle to delete any content that had not been updated in 24 months. The content strategy team owns all employee-facing sites and is thus the key decision maker on the sites' content and look and feel. This helps eliminate duplicated content and provides a better experience for end users.

As a result of the various content management activities, 3M Go launched with an estimated 7,000 pages across 138 corporate sites; this was a significant reduction from the previous intranet, which had more than 16,000 pages and 250-plus sites, many of which were outdated and irrelevant.

Maintaining Quality Long-Term

While all of these activities were crucial to a successful launch, the content management processes did not stop at launch. Post-launch, the team implemented an annual audit process to ensure that content is on the correct sites, tools still work, content owners are still relevant, and all corporate sites still provide a good UX.

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TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• O365 SharePoint Online
Bug Tracking / Quality Assurance	• Team Foundation Server for bug tracking • Test Manager for test plans • Selenium for test script automation
Design Tools	• SharePoint Designer • Photoshop and PowerPoint
Site Building Tools	• Patterns and Practices management shell to create site collections/sites • SharePoint Framework for client-side web part development
Content Management Tools	• No tools; content is managed using SharePoint custom web parts
Search	• No tools; the default out-of-the box web parts, query rules, and result sources are used for search
Other Functions	• CSOM PowerShell Script to get Term store information • Stock API to get the latest stock number • JQuery Text Editor for edit options in the JQuery Text area • SharePoint-hosted app for the selector tool • Budicons, Font Awesome, and Bootstrap for UI development • Git for code source control • JQuery Touch Swipe Plugin to allow swiping on tablets and mobile devices • Moment Time Zone Plugin to adjust the time zone based on user location

Technology Evaluation

The new platform's primary driver was to provide a means for content owners and editors to maintain their own content—which was not possible on the previous

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intranet platform. In addition, team members conducted an evaluation to identify the best long-term technology solution that was the most cost-effective and sustainable.

They chose O365 for several reasons:

- It let them leverage existing O365 technology.
- It provided cloud-based service, so the company didn't have to buy, maintain, and support servers.
- Its improved search function allows incorporation of 3M Go and collaboration content.
- It offers easy access to other O365 applications.

Replacing Obsolete Technology

3M Go replaced 3M Source, which was built on the obsolete (and no longer supported) EWCD platform. One month after 3M Go went Live, 3M Source was harvested.

SEARCH

Tools

3M Go uses out-of-the-box O365 search as a starting point (branded with the 3M Go look and feel), taking advantage of the platform's people and content search.

For filtering, the team used the refiners provided for people and content search, with the people refiners based on SharePoint user profile fields in Delve, and the content refiners based on the metadata associated with the content.

Establishing and Maintaining Relevancy

The intranet team demonstrates its commitment to keeping search results relevant based on feedback, metrics, and usability testing. When users perform a search, they are asked if they found what they were searching for. Based on this data, the team works with content owners to add new content, tag existing content, and adjust verbiage, as needed.

To ensure relevant search results, the team uses both manual and technology tools. Also, the search crawler tracks how many people choose results and how often items are updated. Popularity and frequent content updates increase result relevancy.

Also, 3M Go search benefits from the experienced development team members behind it and the adjustments they continue to learn about and evaluate with the goal of improving search functionality on an ongoing basis.

The team also continues to enhance the search interface (which is largely custom) and conduct usability sessions with employees to gather feedback.

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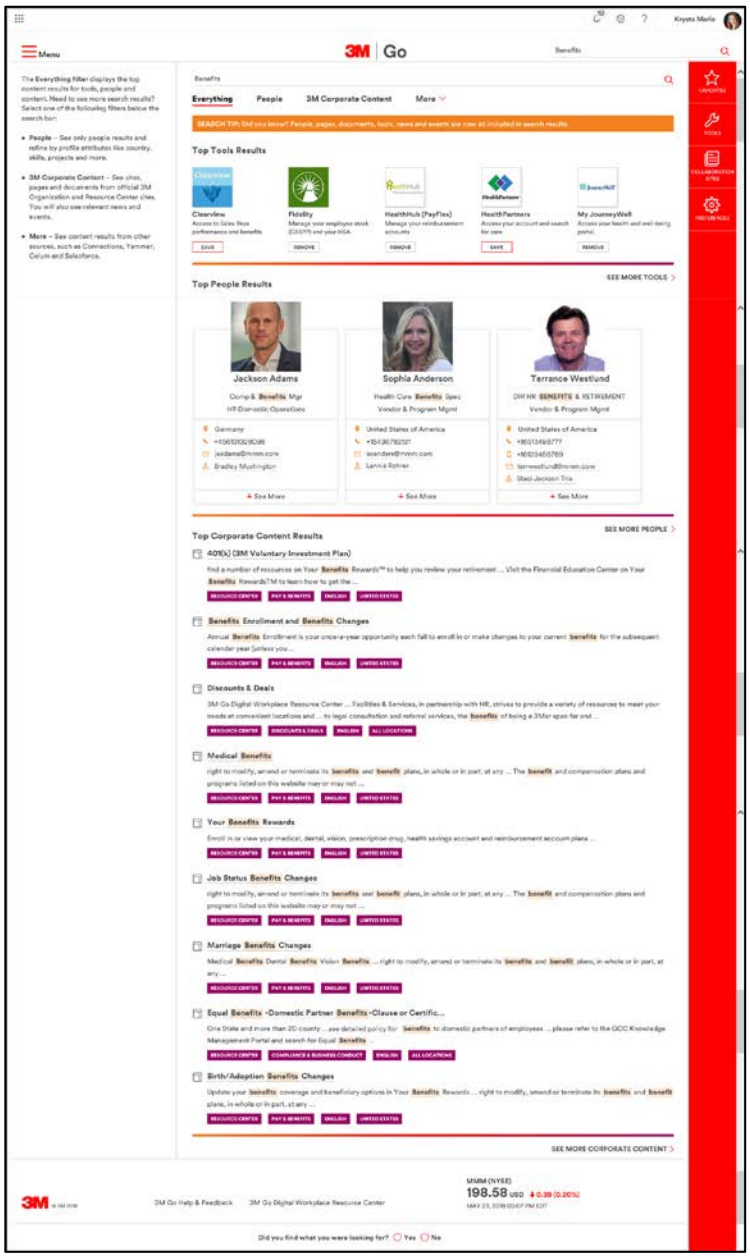


Image 29. 3M Intranet Search Center *Everything* Filter. The *Everything* filter displays search results for tools, people, sites, pages, documents, news, and events all in a single spot. Collaboration content was also included at launch, but concerns about data security caused the team to temporarily remove this functionality. The *Did you find what you were looking for?* question is ever-present and always visible at the bottom of the screen (even when users scroll). *29_3M_29_Search_Everything_Live.PNG*

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ROI

3M Go has provided several key benefits to 3M and its employees globally, including:

- **Increased productivity** as employees find information quickly and easily with a single point of entry for all 3M systems, applications, and tools; enhanced search functionality; consistent design and navigation; and mobile access on iOS devices.
- **More informed and engaged employees** due to centralized and appealing news content.
- **Increased global communication,** including the ability for communicators to publish content themselves and target their desired audiences based on location and/or organization.
- **Greater data consistency and knowledge sharing.** This is achieved through increased visibility into business processes and information globally on a single platform, as well as through the elimination of duplicated content on disconnected systems.
- **Better understanding of 3M.** All 3M organizations are represented on 3M Go (following the *3M Corporate Organizational Guide*).
- **Higher global connectivity and collaboration,** including the ability to easily find people who have a similar role, skills, or interests through a robust people search that works even with partial information.
- **Increased speed** of content updates and **eliminated reliance** on technical resources.
- **Reduced cost, maintenance, and support** for local country intranets and communications platforms.

The impact of these benefits is further defined across the following categorized improvements.

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MEASUREABLE IMPACTS OF 3M GO	
Category	**Measure of Impact**
Business Problems Solved	• Productivity increases when employees have a single platform for all day-to-day work information rather than having to navigate to multiple disconnected systems. • With 3M Go, site and content owners can update their content directly and no longer need to rely on technical resources. On 3M Source, updating content required 112 nondedicated (partial) and 4 dedicated technical resources. Because 3M Go does not require these resources, it saves on costs and allows technical resources to be reallocated to other work. • Using 3M Go, Communicators can now publish their own news, as well as target news and events to a specific audience (country, organization, or a combination of the two). These capabilities allow for a more streamlined process for communicators, saving time and reducing email volume. • The number of news stories published in a six-month timeframe increased 513% from 3M Source to 3M Go. On average, 13 news stories are published each day on 3M Go (targeted to varying audiences) compared to an average of 2 stories per day on 3M Source. In addition, news is read 400% more each day on 3M Go than it was on 3M Source. • All 3M organizations have a Corporate site, increasing the visibility of 3M's organizational structure, purpose, leadership, and initiatives. This increases employee understanding of 3M and helps people feel more connected and engaged.
Strategic Benefits	• A single global platform for all of 3M is cost and resource efficient. • 3M Go ensures the security of 3M's confidential information. • The intranet maximizes 3M's investment in O365/SharePoint Online.

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Cost Savings	By the end of 2019, 3M Go will replace more than 25 local country intranet and communications platforms, saving on maintenance and support costs.
Usability Benefits	• Consistent design elements and navigation for all sites throughout the platform allow users to easily find the information they need. • The new intranet reduced the number of sites by 45%, from 250-plus sites on 3M Source to 138 on 3M Go. The new site combined content on similar topics on a single site, providing a more intuitive experience and making related content easier to find. • The amount of overall content was reduced by 56% from approximately 16,000 pages on 3M Source to 7,000 pages on 3M Go. This reduction resulted from content cleanup efforts to rewrite, consolidate, and eliminate unnecessary or out-of-date content. • In a post-launch satisfaction survey, the team asked employees: “Which three things do you find the most valuable about 3M Go?” In response, the team received 819 comments citing the following features: tools (38%) 3M Go content (20%), news (19%), and people search (19%). Other key mentions included the site’s centralization and visual design.

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Time Savings	• Enhanced search functionality allows users to find people and content quickly and easily. With 3M Go, users can search for people based on name, organization, skills, interests, and more! Further, because all content is tagged, it is easy to refine search results. • Prior to 3M Go, users went to dozens of different platforms and relied heavily on internet browser bookmarks to find sites and tools. 3M Go provides one central location for all employees globally to access content, communications, tools, and sites. • Users no longer need to visit multiple sites for news because it's now centralized on their personalized homepage. • Site and content owners save time by updating their content directly, which requires 5–10 minutes; on the previous site, they had to wait up to two days for their request to be completed by technical resources.
Adoption and Usage	• Only 19 countries have local content on 3M Go, yet it has been accessed by more than 75% of the workforce since launch—that is, 91,700 unique users in 67 countries. Usage is high, with an average of more than 1.7 million sessions and 3.6 million page views per month. On an average day, 3M Go has 30,000–40,000 users, more than 80,000 sessions, and 168,000 page views. • Over a six-month period, overall page views on 3M Go were down by 48% compared to 3M Source, yet the total number of sessions during that period were up more than 50%. This could indicate that people are able to find the content they need faster on 3M Go and thus require fewer clicks.

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Before and After Comparison	• **Before (3M Source):** Poor UX, link farm, inconsistent site design and navigation, outdated content, no ownership, no governance, reliance on technical resources for updating content, "archaic" (according to employees), extremely poor search functionality, no ability to publish country-based news or events, not considered a place to go for news. • **After (3M Go):** clean, simple, and modern design; consistent site layouts and navigation throughout the platform; up-to-date, accurate content; robust search functionality; ability to target content (including news and events) to a specific audience based on location or organization; personalized, customizable, and easy-to-update content; news noted in post-launch survey as a top feature.
Other Evidence of Impact	3M Go lets 3M eliminate other systems and platforms beyond communications and intranet systems. For example: • In an April 2018 email, the Product Application Support Manager stated: *"After further review, investigation, and diligence, we made the decision to no longer pay for support of the* [name removed] *software. This is from a direct result that 3M Go has improved to a point, not only from a contact/people perspective, but beneficial from an overall search capability as well. As such, we are able to save ~$5,800/year thanks to the Go teams hard work!"*

LESSONS LEARNED AND BEST PRACTICES

3M team members have learned many lessons during the 3M Go project, yet the keys to their successful creation and delivery of a new global digital workplace can be boiled down to strong project management and leadership; a clear vision and strategy; a dedicated and passionate team; a solid partnership between the HR, IT, and communications teams; newly established governance and processes; and, most important, a focus on UX supported by research and data.

Other lessons learned include:

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- **Plan in advance to secure collaboration content.** "Ensure leadership and that employees understand the impact of surfacing SharePoint collaboration content in Delve and search prior to launch. We had to turn off the Delve API (which allowed for content discovery in Delve) and remove collaboration content from 3M Go search. A training initiative was kicked off by IT to educate users on how to secure content and SharePoint collaboration sites properly. Just this week, a year after launch, we received approval to turn these features back on."
- **Pay attention to page load times early in the development process.** "Make sure custom code is as efficient as possible."
- **Agile newbies need support.** "Make sure the development team has the proper experience and support if starting Agile for the first time."

Best Practices

For other teams embarking on a similar intranet journey, the team offers the following advice:

- **Don't skimp on research.** "Take time to do thorough research. Having clear data to anchor to will keep you focused on what matters most."
- **Keep the focus on the users.** "End-user focus makes all the difference. Get continuous feedback when determining design and functionality."
- **Successful change management is possible, but it takes work.** "It's very hard to change some users' habits, but don't be afraid to push the envelope! Invest in an effective launch campaign and continue with an awareness and adoption campaign after launch."
- **Help people envision a new solution.** Use visuals and "day in the life" examples when you can, stepping people through what they can expect with the experience."
- **Be flexible with roles and organization planning.** "Members of our team played different roles in various phases of the project. Expect to re-evaluate and adjust roles after launch for a more effective run-state."

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Anthem, Inc.

OVERVIEW

COMPANY

Anthem is working to transform health care with trusted and caring solutions. The company's health plan companies deliver quality products and services that give their members access to the care they need. With over 73 million people served by its affiliated companies, including nearly 40 million within its family of health plans, Anthem is one of the nation's leading health benefits companies.

Headquarters: Indianapolis, IN, US

Company locations: All across the US

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

Annual revenue: Approximately $90 billion USD in 2017

THE INTRANET

Users: All Anthem associates and the majority of the company's contractors use the company's intranet, Pulse, on a daily basis. Anthem's intranet is designed to provide users with an experience that aids both in daily tasks and personal needs through its advanced SSO HR portal. The intranet is used for both internal and external customer service needs and was designed as a one-stop-shop.

Mobile approach: Responsive web design

Technology platform: Oracle WebCenter Suite 12c

TEAM

Leadership: Peter Lobred, Staff VP Enterprise Communications; Ramesh Aki, Director II Technology; Mike Berry, VP HR Service and Solutions; Sanjeeva Kodimala, Director I Technology; Christian Jansen, Director Corporate Communications; Brendan McGarret, Manager II Technology.

Design and development: Amanda Aszman, Corp. Comm. Specialist Sr.; Andre McMillan, Software Architect; Anthony Francisco, Developer Advisor; Arlen Vargas, UX/UI Designer Lead; Barbara Howrey, Systems Analyst Sr.; Brian King, Developer Advisor; Calvin Grier, Security Analyst Sr.; Cole Smith, Systems Analyst; Daniel Smith, Scrum Master; Devi Shailender, UX Designer; Dinesh Bandari, Developer Sr.; Doug Glaze, Developer Advisor; Emily Gosselin, Initiative Project Leader; Harsha Kakumanu, Developer I; Jenn Minder, Staff VP, Communications; Joe Moro, Developer Advisor; Kamalakar Peta, Developer; Leslie Williams, QA Lead; Mary Katherine Lane, Systems Analyst Sr. Advisor; Prashant Baliyan, Content Developer; Raja Raja Chozhan Velayutham, Developer; Rajani Saini, Systems Analyst; Rajvi Jariwala, Developer Advisor; Raviknth Kolagatla, Front-End Developer; Shiva Ram Krishna Pandla, QA Analyst; Sourav Mohapatra, QA Analyst; Srikanth Narala, Front-End Developer; Subhashree Mishra, QA Analyst; Suresh Loganathan, Developer Lead; Tim Schluttenhofer, Scrum Master; Veera Vantipalli, Developer; Vengadessane Sittanandam, Performance Analyst; Vikas Reddy Yelguru, Developer; Whitney Kelso, Administrative Assistant II.

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INTRANET TEAM



Team members shown here (top row, left to right): Peter Lobred, Ramesh Aki, Mike Berry, Sanjeeva Kodimala, Christian Jansen, Brendan McGarret; (second row, left to right): Amanda Aszman, Andre McMillan, Anthony Francisco, Arlen Vargas, Barbara Howrey, Brian King, Calvin Grier; (third row, left to right): Cole Smith, Daniel Smith, Devi Shailender, Dinesh Bandari, Doug Glaze, Emily Gosselin, Harsha Kakumanu; (fourth row, left to right): Jennifer Minder, Joe Moro, Kamalakar Peta, Leslie Williams, Mary Katherine Lane, Prashant Baliyan, Raja Raja Chozhan Velayutham; (fifth row, left to right): Rajani Saini, Rajvi Jariwala, Raviknth Kolagatla, Shiva Ram Krishna Pandla, Sourav Mohapatra, Srikanth Narala, Subhashree Mishra; (bottom row, left to right): Suresh Loganathan, Tim Schluttenhofer, Veera Vantipalli, Vengadessane Sittanandam, Vikas Reddy Yelguru, Whitney Kelso.

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HIGHLIGHTS ABOUT THIS WINNER

The team behind Anthem's Pulse intranet described its three goals for the intranet's design as: 1) connect, 2) inform, and 3) continually improve the UX. Without question, the team achieved all three goals with flying colors. The intranet gives an inordinate yet manageable amount of information about HR, the company, and individuals. In addition, its collaboration features make it commonplace for individuals to work together. Finally, the UI iteration history and the team's future plans promise that the design will continue to evolve and make the UX even better.

- **HR:** It's not surprising that a health insurance company would have a good HR section on its own intranet, but Anthem's is still unexpectedly impressive. Pulse's comprehensive *Human Resource* section makes it possible for users to discover and find valuable tools, benefits, and content that can improve their work and personal lives. Personalized benefits information and self-service options put employees in control and give them clear options to improve their well being. Performance-improvement and other educational content demonstrate that the organization is highly invested in its employees.
- **Personalized and customizable:** Applications, news, and a helpful dashboard are among the areas tailored to each employee. This declutters the intranet and pushes only the right content to the individual.
- **Brand and logo:** Not every intranet has a name, and many lack their own logo. Pulse, however, has both. Together, they help make the intranet both an easily recognized and referenced tool and a force in its own right.
- **Comforting color palette:** Light blue, royal blue, and grey make a pleasant palette for pages, while punches of orange make buttons and other elements visible. By subtly working in Anthem's traditional healthy brand color palette and adding a dash of flare, Pulse stands out without calling undue attention to the design.
- **Dashboard to apps, favorites, and more:** The dashboard feature includes icons that link to key apps—some of which are personalized to the user, such as the corporate calendar—and to the user's customized apps list and favorites. This always-available dashboard appears near the site's global navigation.
- **Communities:** Communities let any employee create a space to communicate information about a topic or project. Communities include an overview, key resources, events, and blogs. Pulse communities are separated into three categories: *State Communities* include associates located in a specific state; *Communities of Interest* let any associate create a customized community; and *Business Communities* directly relate to the Anthem business.
- **Robust people search:** On any page, the *People Finder* lets users easily search for colleges using either simple or elaborate queries, and then see thorough results within moments.

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- **Rich employee profile:** The employee profile houses a large amount of information about each employee. This helps employees get to know one another and work together. The profile area also lets users create and manage their lists of important applications and bookmarks.
- **Reporting issues:** Pulse includes a section that lets employees know that it's okay—and even encouraged—to report issues they notice on anything related to ethics, finance, fraud, or security. A tool consolidates possible issues and links to descriptions to help identify issues and methods to report them. This shows that Anthem wants employees to speak up, and that their voices matter.

BACKGROUND

In 2016, Anthem embarked on a project to create a new, customized intranet that would not only inform and educate users through communication technologies, but also aid in their day-to-day tasks. As a company in the health care industry, it has numerous customers who rely on accurate information on a minute-to-minute basis. Anthem therefore required a best-in-class system that would empower its internal associates to serve customers with great care, accuracy, and commitment. Prior to Pulse, Anthem used an intranet called WorkNet, which had become outdated and cumbersome. Anthem needed a new solution that would serve its current needs as well as provide a foundation for its needs for many years to come.

As with any project, the new Anthem intranet came with its own set of obstacles, but none that proved too difficult for the team to overcome. A dedicated and diversified team of Anthem associates from several enterprise areas set out on a multifaceted mission to create a best-in-class intranet experience for each and every user.

Starting small was the name of the game when the idea for the new intranet—Pulse—first came to be. The Anthem team knew it had to aim high, but it also knew that taking on too much would surely mean delays and unavoidable mishaps so it kept even the team size intentionally small. This small but mighty group soon adopted the adage: *No idea is a bad idea*.

Anthem has many different business areas with needs that deserve attention and consideration, so the Pulse team was comprised of diverse individuals representing each of the functional areas. One of the team's first tasks was to brainstorm project objectives, which it did through a series of sessions. Because the intranet had not been updated for more than 10 years, identifying needed changes was rather easy. The question was: *Which changes were of the highest priority?* And, as a follow-on: *Which approach would be best to implement those changes?* The team clearly had enormous opportunity and potential for success, but to achieve it, a strategic and methodical approach was needed. The team could not rely solely on the input of its members—especially within such a large organization—so a Pulse Ambassador Committee was formed made up of volunteer associates from across the company to aid in specific tasks, including surveys, focus groups, and early adoption testing. As the project progressed, the Ambassador Committee, along with the Pulse Steering Committee, proved invaluable in validating appropriate solutions and processes.

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The Anthem team used an Agile approach throughout the entire Pulse creation process, and continues to use it today as the site evolves. Agile lets the team pivot quickly without being too disruptive. During primary development, regular backlog grooming sessions and daily Scrum calls helped keep the team on task, connected, and engaged. And, in an effort to continue to listen to Pulse users post launch an internal suggestion box was set up. Feedback received through this mailbox has helped the team identify what users like, don't like, and find most relevant. The team has also been able to keep a running list of suggested features that may be added to the site as it evolves. The team has found that being open to suggestions from the user base is extremely important and valuable.



Image 30. Anthem Previous Intranet Homepage. The homepage of WorkNet, Anthem's previous intranet. *30_Anthem_01_home_version1.png*

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DESIGN REVIEW

Homepage



Image 31. Anthem's New Pulse Intranet Homepage. News, access to tools, and a lovely color palette make the new Anthem intranet homepage supportive and pleasant. *31_Anthem_02_home_live.png*

Homepage, Highlights

The Anthem intranet homepage offers personalized news and a customizable apps list so users can easily see what's important and access what they need each day.

You can't help but notice the intranet's color palette—light blue, royal blue, grey, and black—along with judiciously used punches of color (such as green for an elevated stock price). The palette creates a calm vibe and supports the content without taking attention away from it.

To ensure that everyone can find the intranet easily, all Anthem associates have Pulse set as the homepage in their web browser, and a shortcut icon to Pulse is on their computer's desktop.

1. **Logo:** The name of the intranet, *Pulse*, is embedded in the intranet's logo, along with the tagline: *Your Anthem Network*. This immediately tells users where they are and what the tool is for.
2. **Utility navigation:** The far upper right houses a few tools, including stock price, *Site Tips*, site search, an alerts icon, and the logged-in user's photo. These are items employees might need at any time and appear on each Pulse page. Also, search and login appear in the upper right of pages, where users expect to see them.
3. **Global navigation:** A narrow global navigation structure puts forth just four top-level navigation links: *Collaborate*, *Human Resources*, *Our Company*, and *Tools & Resources*. Because the labels are distinct, it is easy for users to scan the links and make a selection. Further, the blue text pops on the white background, making it easy to see. Breadcrumbs in the upper left of pages help users see where in the IA they are.
4. **Dashboard icons:** Each user has a personalized, customizable dashboard with apps, favorites, and more. Icons appear to the right of the global navigation menu; because these icons lead to commonly used and highly important Pulse sections, they are always available.
5. **Carousel:** The five most important articles rotate in the carousel at the top of the homepage. The title, a short summary, and an image help engage employees.
6. **News:** A tabbed news section below the carousel separates the news into three different categories: 1) *Anthem News* focuses on the enterprise, including HR, tools and resources, and general company news. 2) *My News* is personalized news related to user's community, groups, and so on. 3) *External News* focuses on public media mentions of Anthem. The labels for each news type are clear and their tabs are visible, with the selected one changing from grey to blue. This is a highly successful interface element. Including both the news carousel and a tabbed news section on the homepage make the news highly visible. In fact, these UI elements increased Anthem's internal news engagement by 256%.

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7. **Applications:** The homepage's *My Apps* section appears below the carousal. Here, without clicking or hovering, users can immediately see their list of apps. The small icons in the upper left of the apps section let users show the apps as a list or as large icons. The orange gear icon lets them edit their apps list. Finally, the *View All Apps* link leads to a list of all applications available to them. This area makes it a breeze for employees to find and access their common tools.
8. **Cafeteria menu:** It is not surprising that the cafeteria menu is an important feature for intranet users. After all, don't most of us want to know where our next meal is coming from, and what that meal will be? The *Café Menu* section lists the hours of operation and a link to the menu for the café and catering. A happy belly helps make a happy employee.
9. **Promoted content and polls:** Sections for current initiatives and polls appear in the same row below the news. Users look here to see interesting and sometimes fun elements, and to see their colleagues' answers to the current poll.
10. **Weather:** Health-conscious health-insurance employees can get a glimpse of the weather outside just by looking at the Pulse homepage. Anyone who wants to go out for a dose of vitamin D or an adrenalin-pumping bicycle ride can see the weather outside in the weather section. The background image illustrates current conditions, such as showing clouds or a sun.
11. **Fat footer:** The footer at the bottom of the page is delineated by a blue line and a background grey that is slighter darker than that of the homepage. The text for the three columns headings is darker than the rest of the links, making it easy for employees to scan the main topics. The footer includes company information, methods for reporting concerns, help contacts for the intranet and its collaboration tool, and a link to share feedback. The footer appears on every page since these are important links, but not ones that people need to see in the global navigation or above the fold.

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Home, Mobile

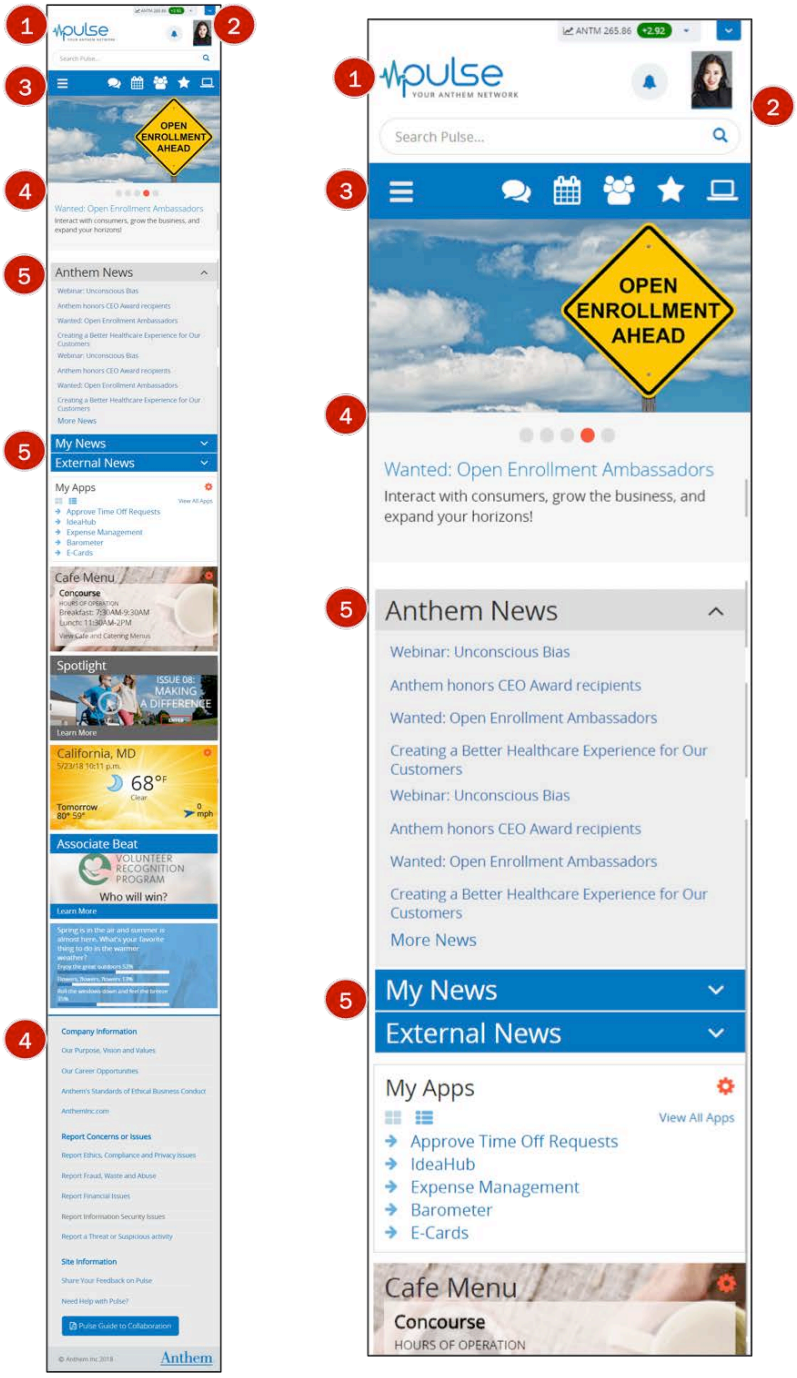


Image 32. Anthem Intranet Mobile Homepage. When viewed on mobile devices, homepage sections and the entire page layout changes orientation from horizontal to vertical. *32_Anthem_03_mobilehome_live.png*

Home, Mobile Highlights

Research revealed that few people would access the intranet from shared workstations and mobile devices, so the team took a desktop-first approach to designing Pulse, while also making it responsive. In doing this, the team focused on designing for Anthem-issued mobile devices and conducted research to identify the tasks employees would use most on mobile. Two of the top features that users mentioned were the people finder and organization charts.

1. **Logo:** The logo and tagline appears in the same place on mobile as it does on desktop.
2. **Utility navigation:** The stock price, alerts icon, and user's login image appear in the same area on mobile as they do on desktop (the upper right). The help feature is collapsed into a small blue button. The search field drops down a row and spans the screen's width, making it easier for users to tap, type, and see the query.
3. **Global navigation and dashboard icons:** The global navigation collapses into a hamburger menu on mobile, and the dashboard icon appears on the same row.
4. **Column drop and vertical layout:** The rest of the items on the homepage are prioritized vertically, utilizing the "column drop" responsive layout method on mobile. The carousel and some other sections change their orientation to a vertical layout on mobile to accommodate the smaller screen size. The footer links also change to a vertical layout.
5. **Accordion:** The news tabs that appear on desktop change to an accordion menu that users can expand and collapse to reveal the different news categories.

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Dashboard Icons Wizard

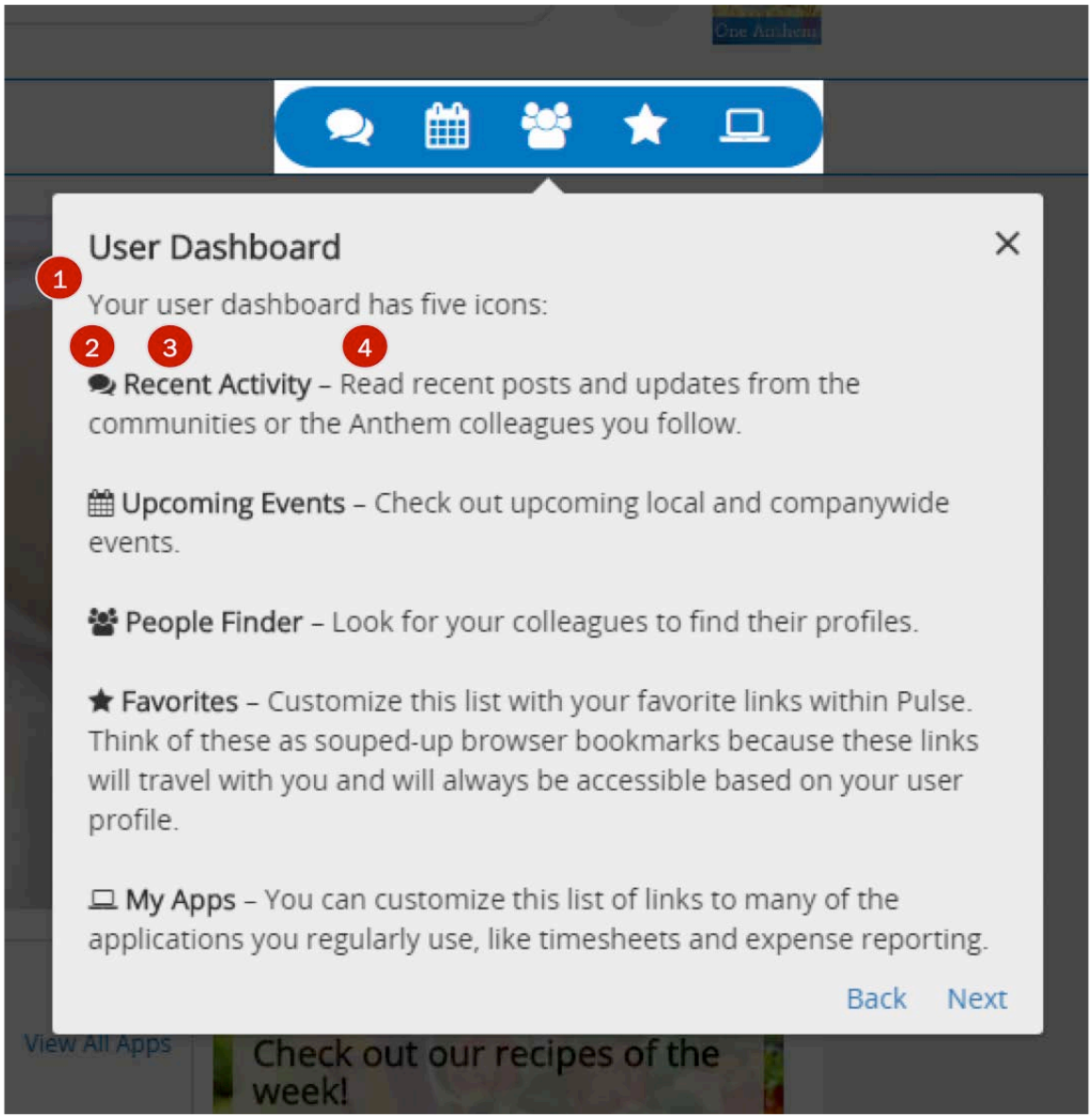


Image 33. Anthem Intranet Dashboard Icons Wizard. Clicking on the site tips wizard icon on most Pulse pages gives users helpful tutorial content, which is particularly useful for an expanding company that regularly adds new associates. *33_Anthem_04_sitewizard_live.png*

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Dashboard Icons Wizard, Highlights

To ensure that employees understand the dashboard icons, the site tips wizard icon on most Pulse pages offers a helpful tutorial of content.

1. **Title:** The title and the short description below it indicates that the icons are related to the user's dashboard.
2. **Icon:** Each icon in the dashboard (icon toolbar) is repeated in the lightbox list, making it easy for users to match the icon to its description.
3. **Section name:** The name of each dashboard section appears next.
4. **Description:** A short description of each dashboard section follows its respective name, letting users know more specifically what they can do in their dashboard.

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Dashboard, Events

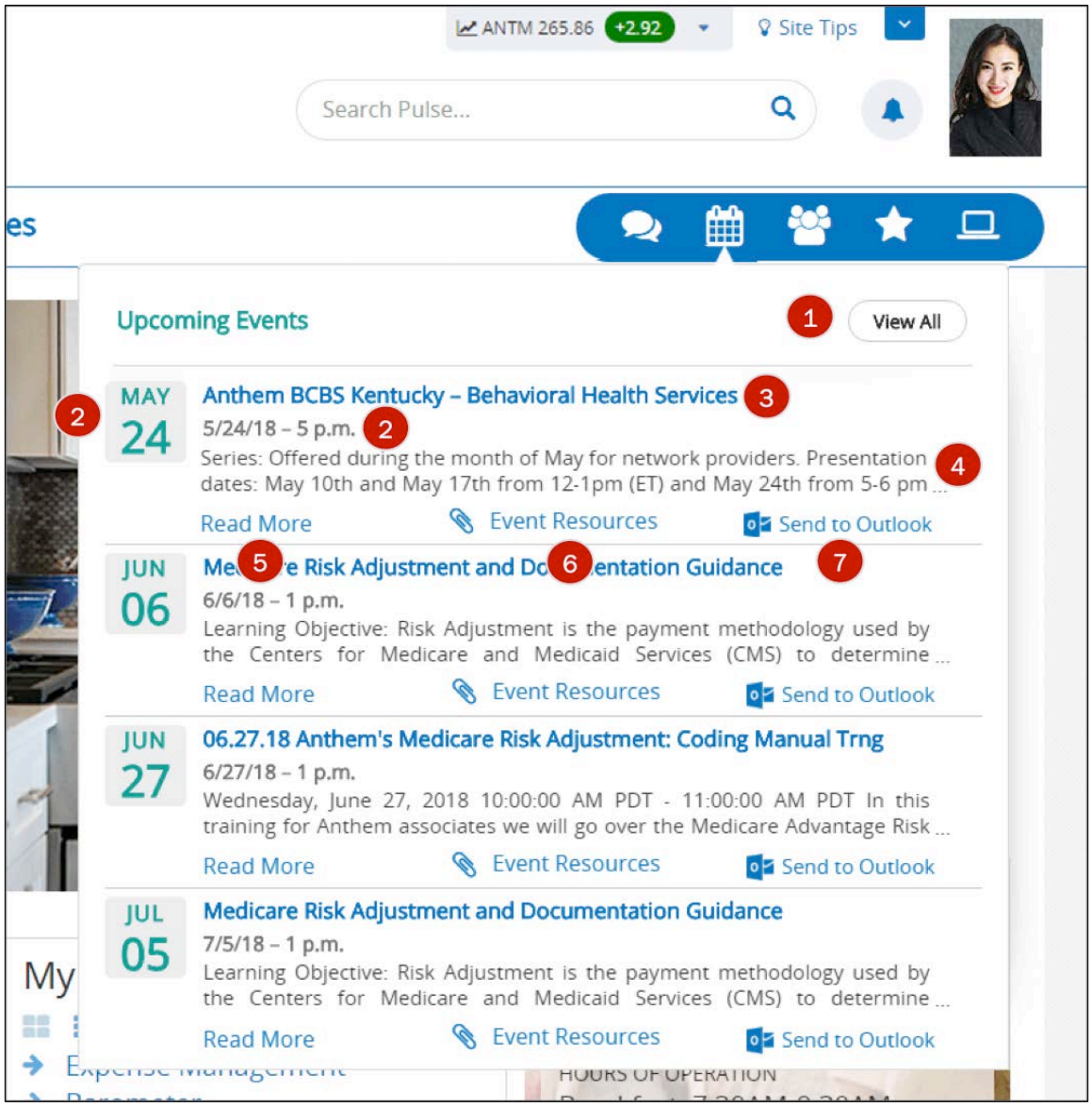


Image 34. Anthem Intranet Events Dashboard. Each users' events are listed in their dashboard calendar.
34_Anthem_05_userdashboardupcomingevents_live.png

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Dashboard Events, Highlights

Clicking the dashboard calendar icon opens a list of four *Upcoming Events*. All calendar entries are personalized to the user and most entries are created by a department, such as HR.

1. **View all events:** To see all of their events, users can click the *View All* button.
2. **Date and time:** Each event has a large calendar icon on the left, denoting the date. The date is again listed, along with the event time, below the title.
3. **Title:** The event's name appears in large blue letters.
4. **Description:** A short description lets employees know what the event is about.
5. **More information:** Users can click the *Read More* link to find additional details about the event.
6. **Event-related materials:** If the event has materials for attendees, users can access them via the *Event Resources* link.
7. **Add to calendar:** If users are interested in an event, they can add it to their Outlook calendar (the preferred personal calendar tool at Anthem). Clicking *Send to Outlook* creates an event entry in Outlook.

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Dashboard, *People Finder*

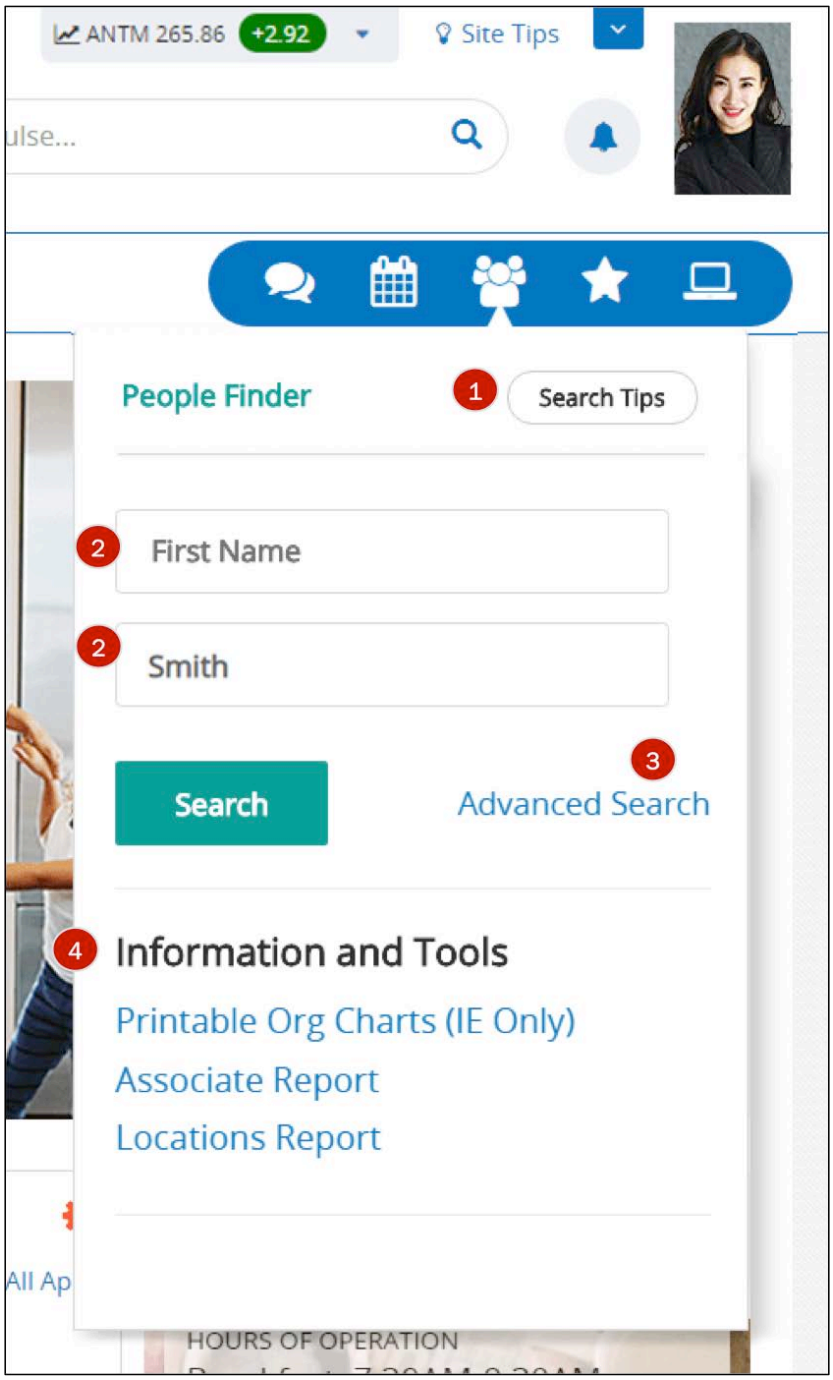


Image 35. Anthem Intranet *People Finder* Dashboard. The *People Finder* is a killer app that allows users to search for colleagues. *35_Anthem_06_userdashboard_peopleform_live.png*

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Dashboard *People Finder*, Highlights

Anthem employs more than 70,000 people, and they all have opportunities to be a resource for their colleagues—assuming their colleagues can find them. The *People Finder* makes this possible.

1. **Tips:** Users looking for help don't have to look far. The *Search Tips* button appears in the upper right of the *People Finder*.
2. **Search fields:** Users can search for colleagues by first name, last name, or both. This is a flexible option for people who don't know a coworker's full name. Users can also do a special character search by typing * at the beginning or end of a name if they are not sure of exact spelling.
3. **Advanced:** Users can search by criteria beyond the person's name when they access the *Advanced Search* features. Putting these less-common ways to search under a link makes the default search simple and approachable. Further, the label, *Advanced Search*, is easily understood, so people seeking more flexibility and power can easily find it.
4. **More resources:** Anthem has various resources—including org charts and locations—related to people. Links to a few of these appear at the bottom of the *People Finder*.

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Dashboard, People Results

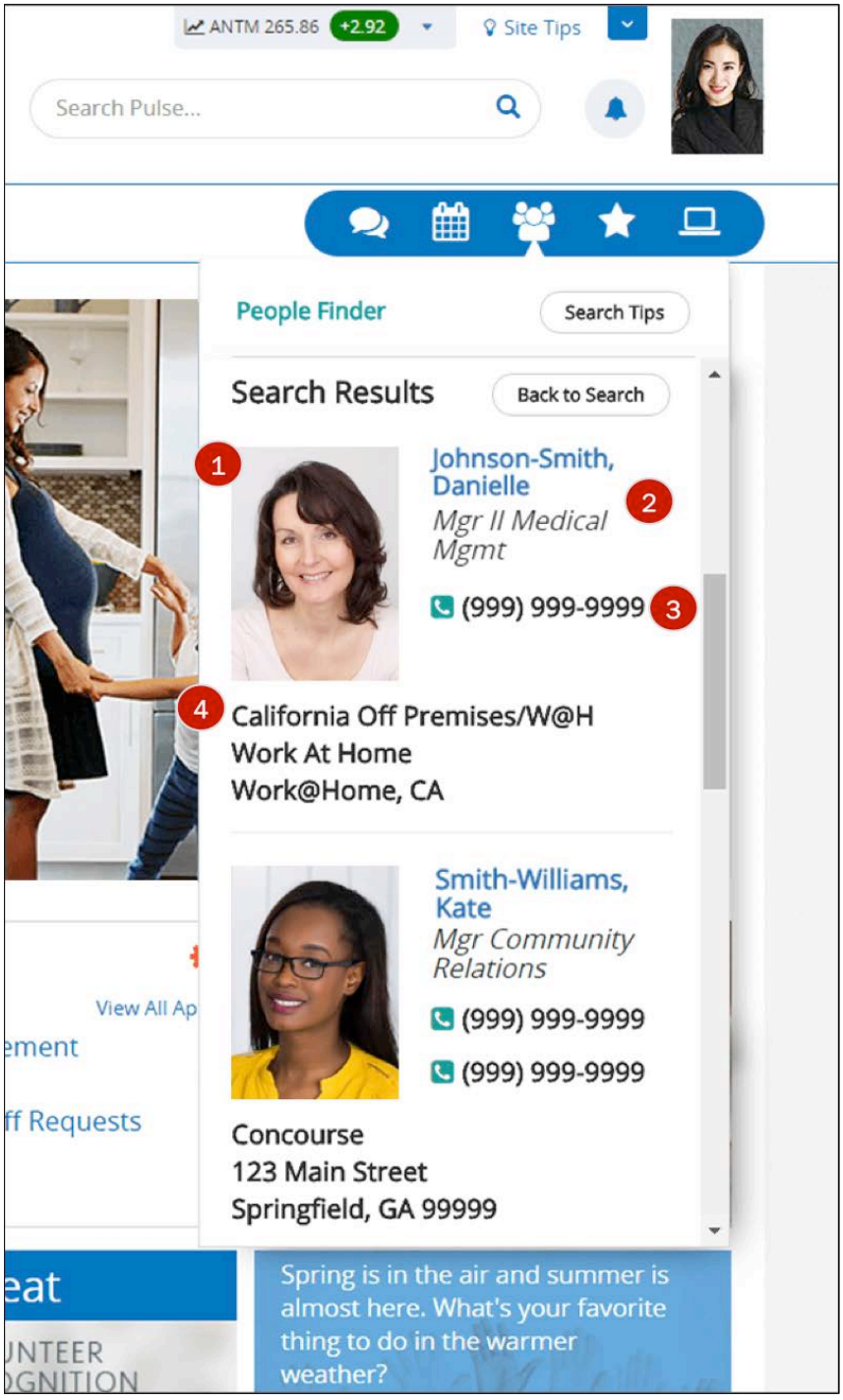


Image 36. Anthem Intranet People Search. This shows a search for people results in a scrollable list of rich results.
36_Anthem_07_userdashboard_peopleresults_live.png

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Dashboard People Results, Highlights

With just a few keystrokes and without having to leave the page, users can find the coworkers they are looking for. The immediacy of the search results' detailed information helps employees to proceed speedily.

1. **Photo:** The employee's photo appears first, giving the search results a human angle.
2. **Name and title:** The employee's name appears is blue text, which both makes it visible and indicates that it's a clickable link (which leads to the employee's profile page). Just below the name is the employee's job title, which clues colleagues in on the person's role at Anthem.
3. **Phone:** The employee's phone number appears next, making it easy for people to call each other right from the search results.
4. **Location:** The employee's office location appears below the photo, including for those who work from home.

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Dashboard, Advanced People Search

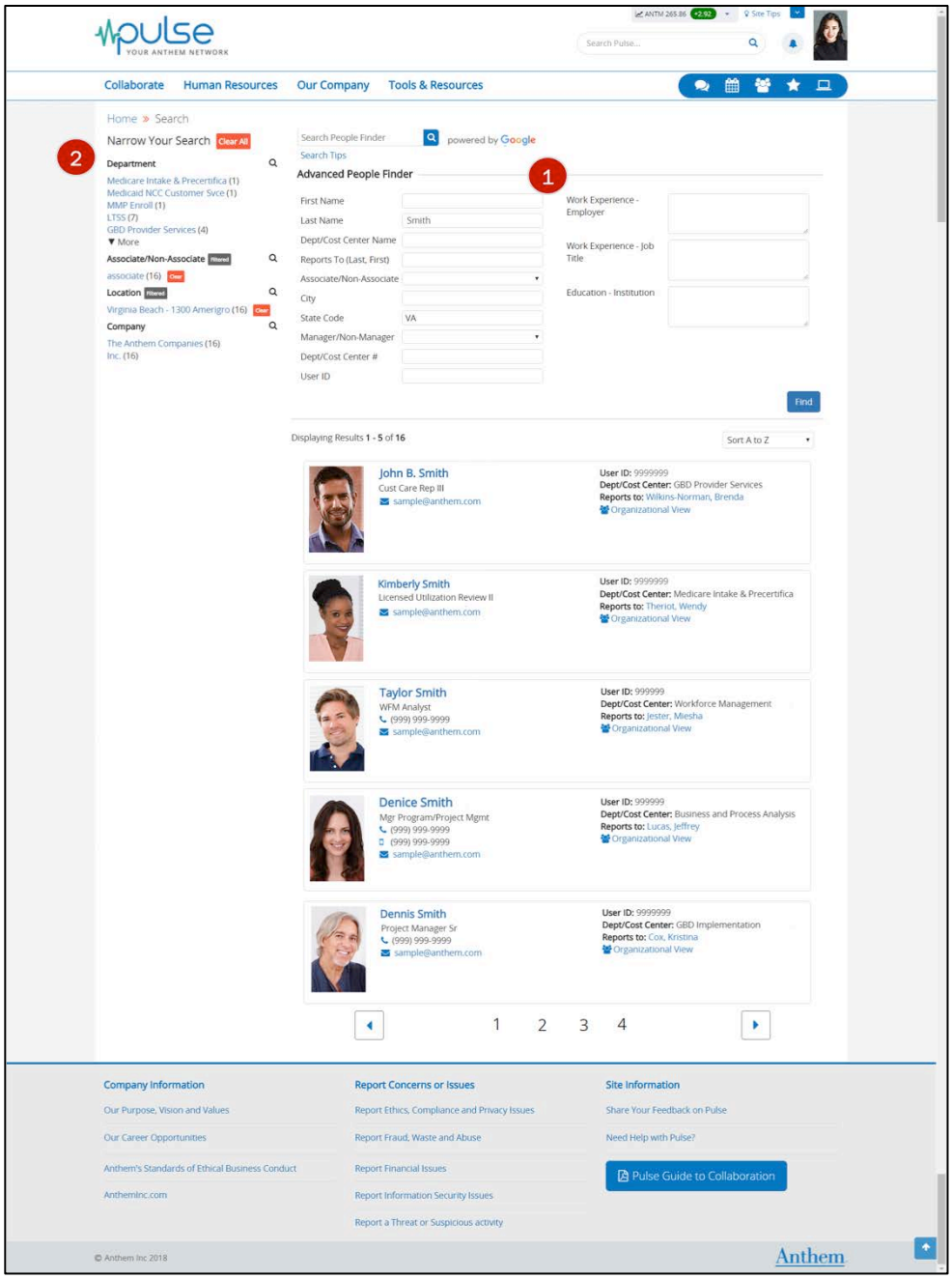


Image 37. Anthem Intranet Advanced People Search. Employees can search by detailed criteria using the *Advanced People Finder* function. *37_Anthem_08_searchpeopleadvanced_live.png*

Dashboard Advanced People Search, Highlights

Employees can search for one another using a variety of fields and filters.

1. **Fields:** Users can search using any of the numerous fields related to pertinent employee information, including manager, city, and education.
2. **Filters:** Users can select from the suggested filters on the left to refine the results. To start fresh with filters, users simply click the orange *Clear All* button above the list of filters.

Dashboard, Favorites

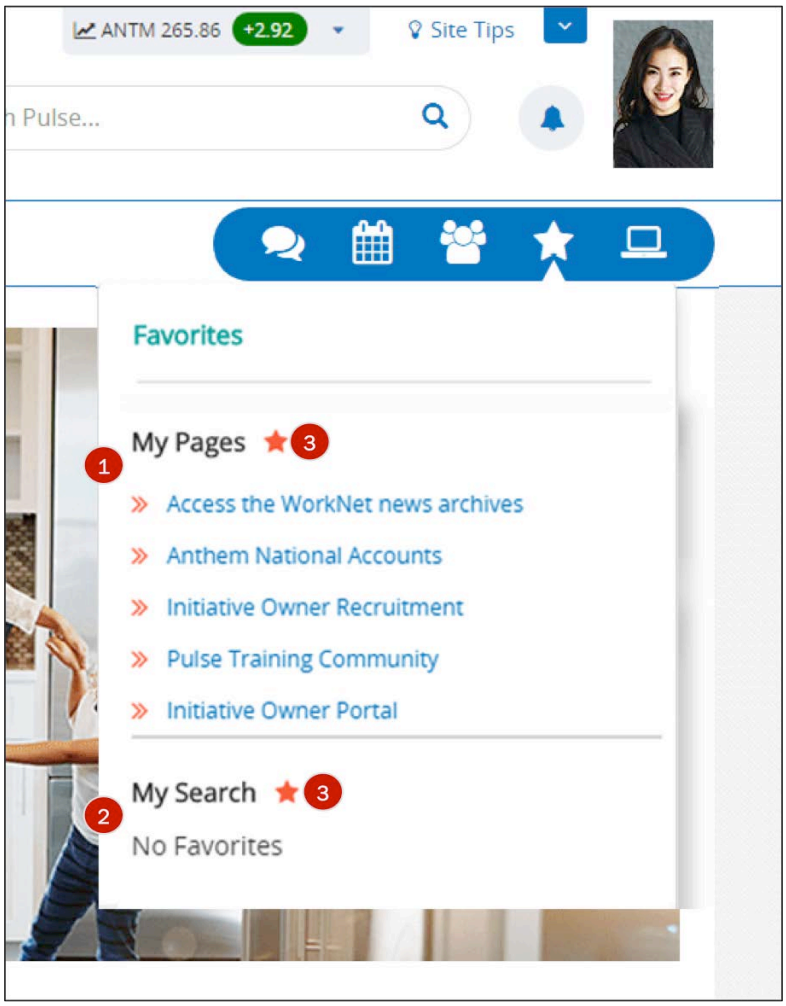


Image 38. Anthem Intranet Favorites Dashboard. Users can add bookmarks to any pages or search results pages on the site. *38_Anthem_09_userdashboard_favorites_live.png*

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Dashboard Favorites, Highlights

Users can manage their favorites by clicking the orange star that appears on almost every page. They can quickly access the list of bookmarks via the favorites icon (a white star) in the dashboard. There is power to having the user's favorites accessible from any computer rather than tied to browser bookmarks.

1. **Links to pages:** The *My Pages* title at the top is informative and reminds the user of the type of favorites that appear. The links are in blue text, indicating that they are clickable.
2. **Links to saved searches:** The *My Search* section offers links to pages of search results that the user has saved. If users have not created any search query bookmarks, the status message *No Favorites* appears instead.
3. **Manage:** Users can add, remove, or reorder their favorites by clicking either of the orange star icons in the menu.

Dashboard, Applications

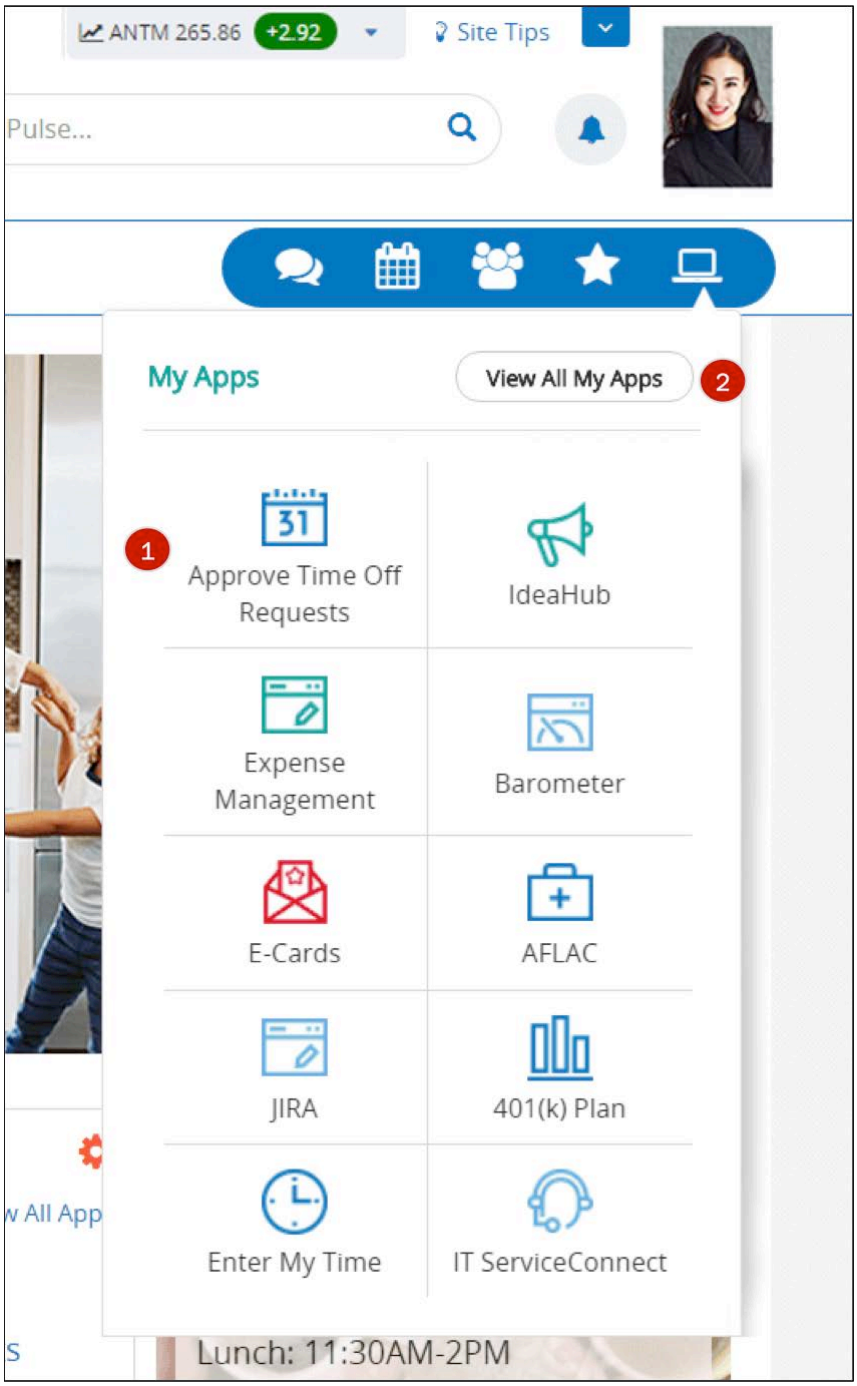


Image 39. Anthem Intranet Applications Dashboard. The dashboard's application icon opens a list of the logged-in user's applications.
39_Anthem_10_userdashboardmyapps_live.png

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Dashboard Applications, Highlights

Users can create a list of preferred applications that appears both in a section on the homepage and in a menu of links and icons that opens when users click the apps dashboard icon (a computer).

1. **Applications:** The name and a related icon for each application appear in the apps menu, giving users quick access to apps.
2. **Viewing options:** The *View All My Apps* button opens a page of all apps that the user is interested in; users can also add and remove apps on this page. The intranet supports approximately 130 applications. The most-used applications—including the HR dashboard, user profiles, and *People Finder*—are integrated into Pulse. Other applications are linked third-party apps that are still supported with the intranet's single-sign on.

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Global Navigation

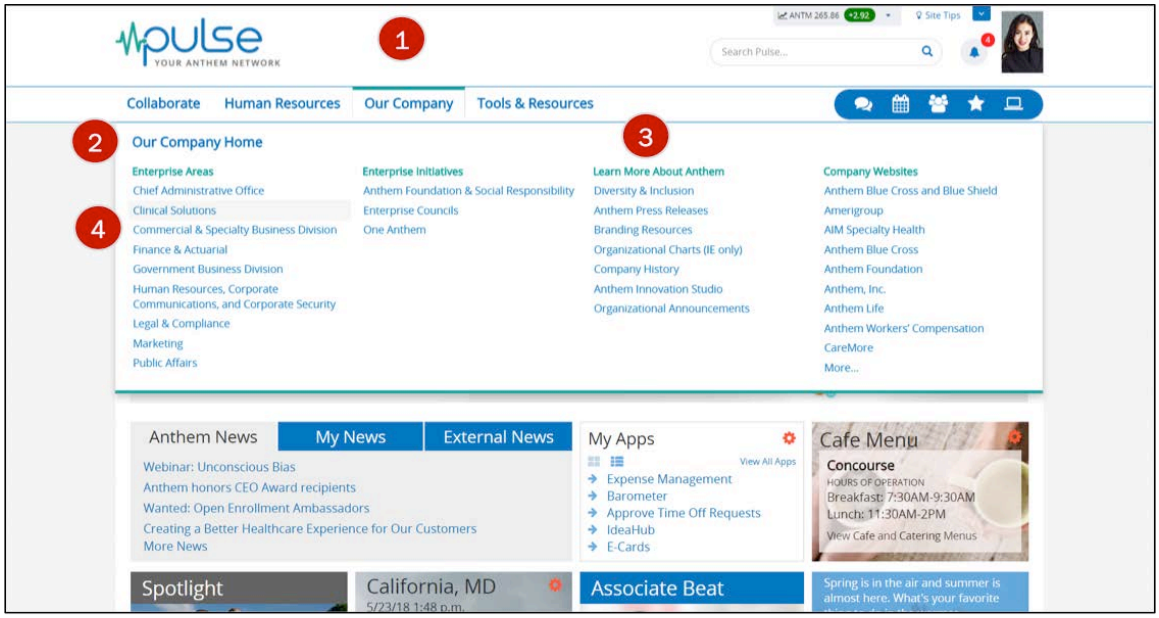




Image 40. Anthem Intranet Global Navigation. The megamenu makes it easy for users to scan all the options in each top-level category. *40_Anthem_11_topnavigation_live.png*

Global Navigation, Highlights

The megamenu uses subtle visual indicators to convey the hierarchy of choices.

1. **Current selection:** The currently selected top-level global navigation link looks selected because of the thick teal line above it and the subtle grey bars flanking the text label. The nonselected items have none of these traits, which clearly distinguishes the selected one.
2. **Link to section page:** When team members evaluated Pulse's content and IA (to inform the global navigation design), they determined that a section page for each intranet area would be helpful. The *Our Company Home* link repeats the intranet section's name, *Our Company,* signaling that the page describes that section. Another signal of that link's importance is its size and color: it is the same color as the text in the top-level global navigation menu, with just a slightly smaller font.
3. **Subheadings:** Subheadings make megamenus easy to deal with, as users can scan them to find the right section before they read the links. The label over each column of links describes the links in that column. The subheading's position and different text color (teal) and bolding indicates the subhead's place in the hierarchy, just below the section page link and above the page links.
4. **Links:** The blue links are legible and obviously clickable.
5. **Hover on links:** When users hover the cursor over a link, a subtle grey background appears.

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Global Navigation, Mobile

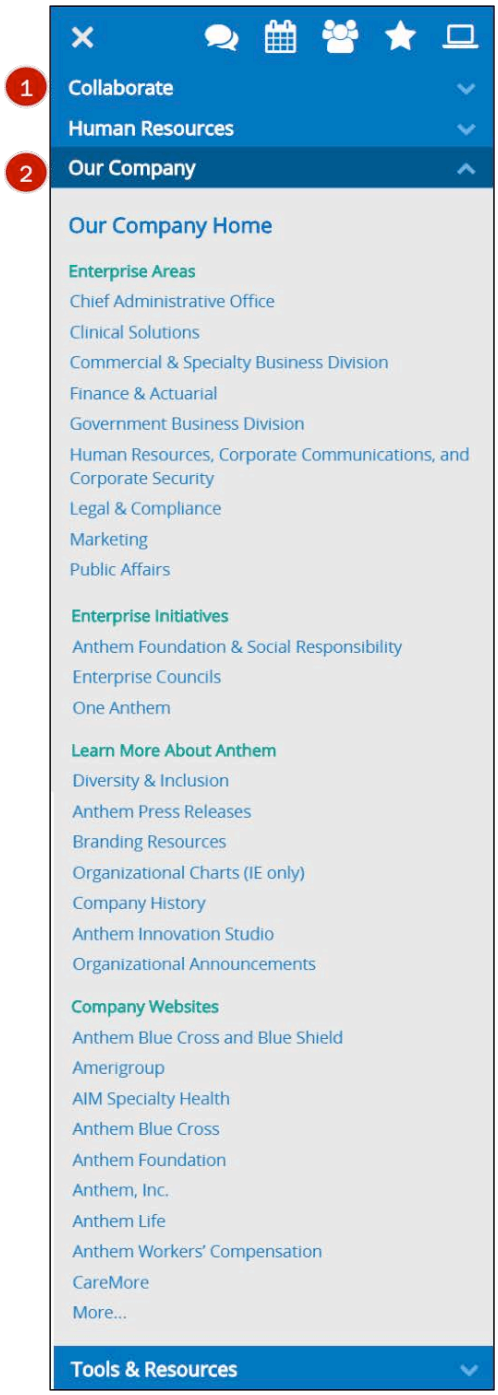


Image 41. Anthem Intranet Mobile Global Navigation. The global navigation appears in a mobile-friendly way on phones. *41_Anthem_12_mobilemegamenu_live.png*

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Global Navigation, Mobile Highlights

Megamenus typically don't display in a usable way on mobile phones, so the Pulse designers opted for an accordion menu.

1. **Collapsed menu:** The menus that are not selected appear collapsed; they have a consistent look, including bold white text, a dark blue background, and a carat icon pointing down (signaling that, if clicked, it will expand the menu).
2. **Expanded menu:** The selected menu is expanded. The top-level label has a darker blue background than the deselected menus. The carat points up (signaling that, if clicked, it will collapse the menu). The menu items are stacked vertically and have subheadings for easy scanning.

Search

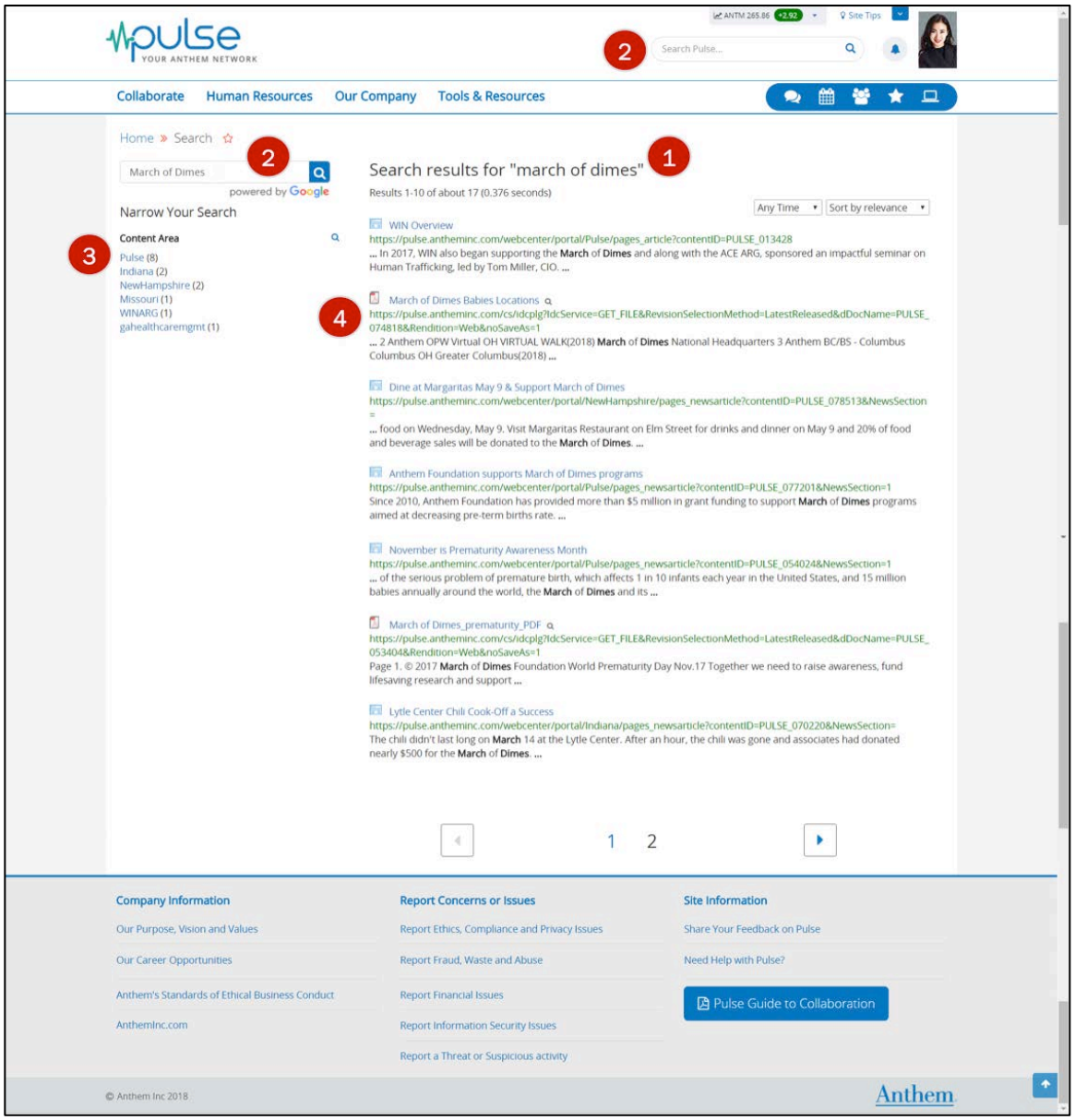


Image 42. Anthem Intranet Search. A slightly tweaked out-of-box solution powers the Pulse site search. *42_Anthem_13_searchglobal_live.png*

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Search, Highlights

The SERP includes the user's query, the search results, and options for filtering the results.

1. **Query:** Repeating the query helps users search again if needed.
2. **Fields:** Users can search again from either of two search fields on the SERP.
3. **Filters:** Clicking links in the set of filters on the left refines the results.
4. **Results:** The results include a large amount of pertinent information to help users decide if they have the results they need and which results might be most helpful. Each result includes: an icon showing its medium, the title, the URL, and a short selection of content from the page or file.

Employee Profile

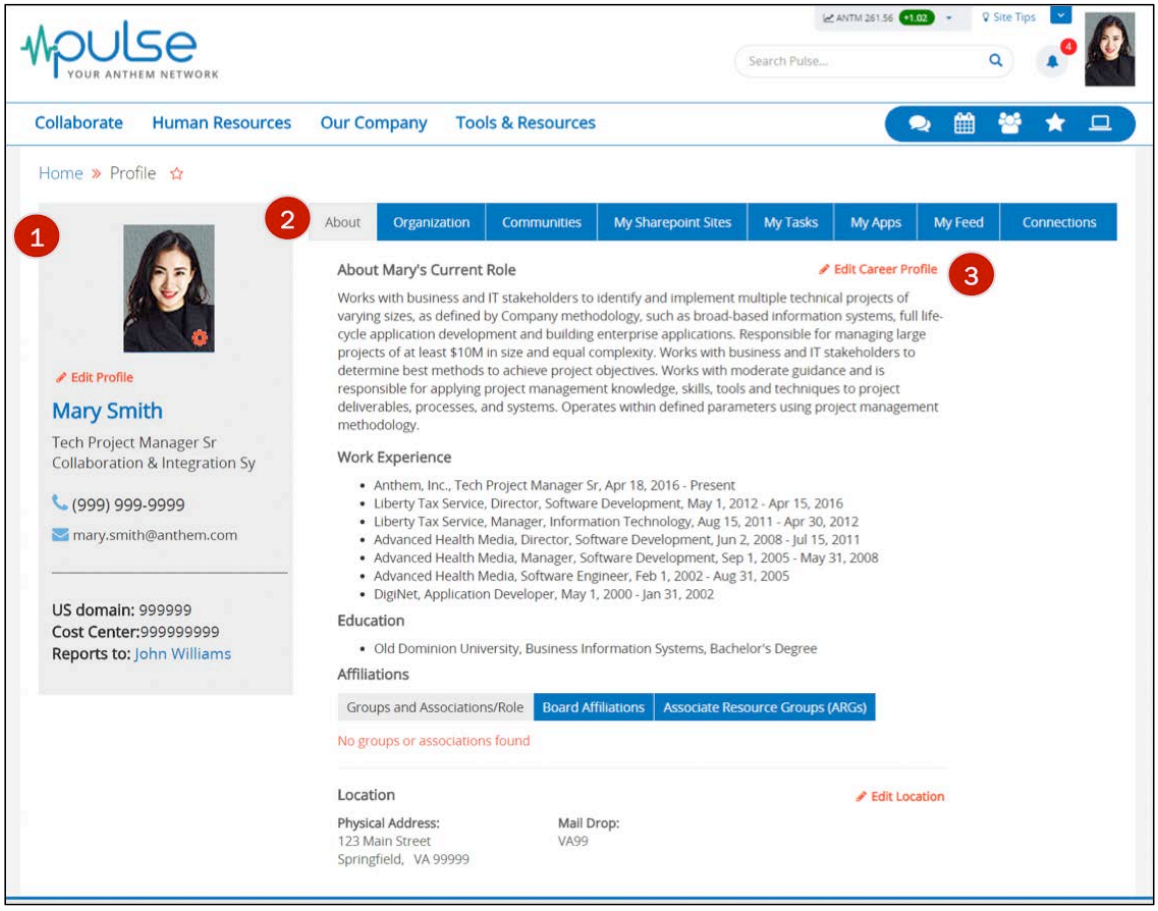


Image 43. Anthem Intranet Employee Profile. Employee profile documents on Pulse include basic contact information and much more.
43_Anthem_14_profile_live.png

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Employee Profile Highlights

A huge amount of information—some from HR systems and some that the users provide—is housed in the employee profile documents.

1. **Key information:** A grey section on the left includes the employee's photo, name, job, contact information, cost center, and manger. In many cases, the information in the grey box is all a user needs to move forward.
2. **Tabbed sections:** The eight tabs across the top lead to employee-related content, including the person's communities, tasks, and apps.
3. **Edit:** Users are encouraged to write various profile sections, and they can edit these sections at any time by clicking the red *edit* links.

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Employee Profile, Mobile

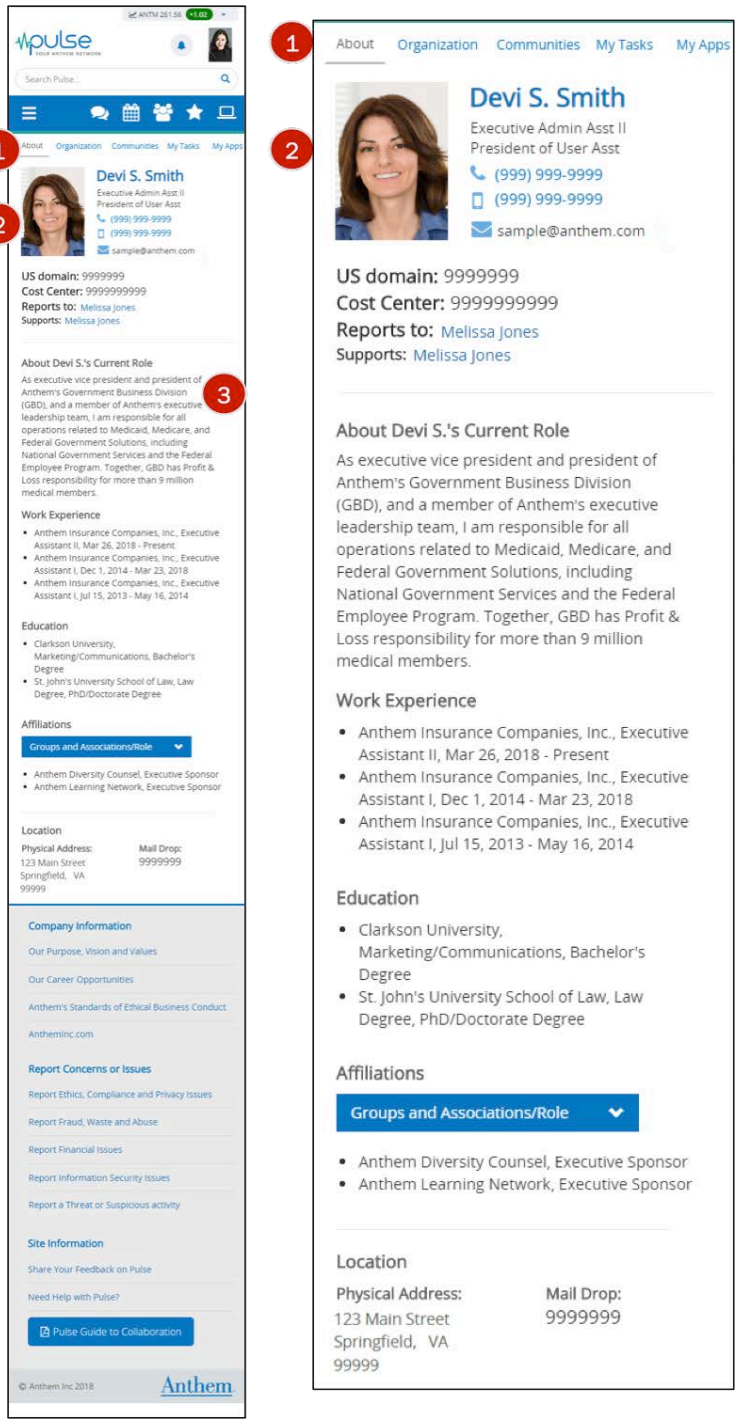


Image 44. Anthem Intranet Mobile Employee Profile. When using a mobile device, employees can access all the information in employee profile documents. *44_Anthem_15_mobileuserprofile_live.png*

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Employee Profile, Mobile Highlights

The same thorough information that appears in the employee profile document on desktop also appears on mobile, but is formatted for mobile consumption.

1. **Navigation links:** The tabs are present, but their look is simplified to . On mobile they appear more like horizontal navigation links.
2. **Key information:** The designers omitted the gray background here to increase both page load times and the contrast between the text and background (making the text easier to read).
3. **Narrow column:** The text column width is greatly reduced, making text easier to read.

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Employee Profile, *My Apps*

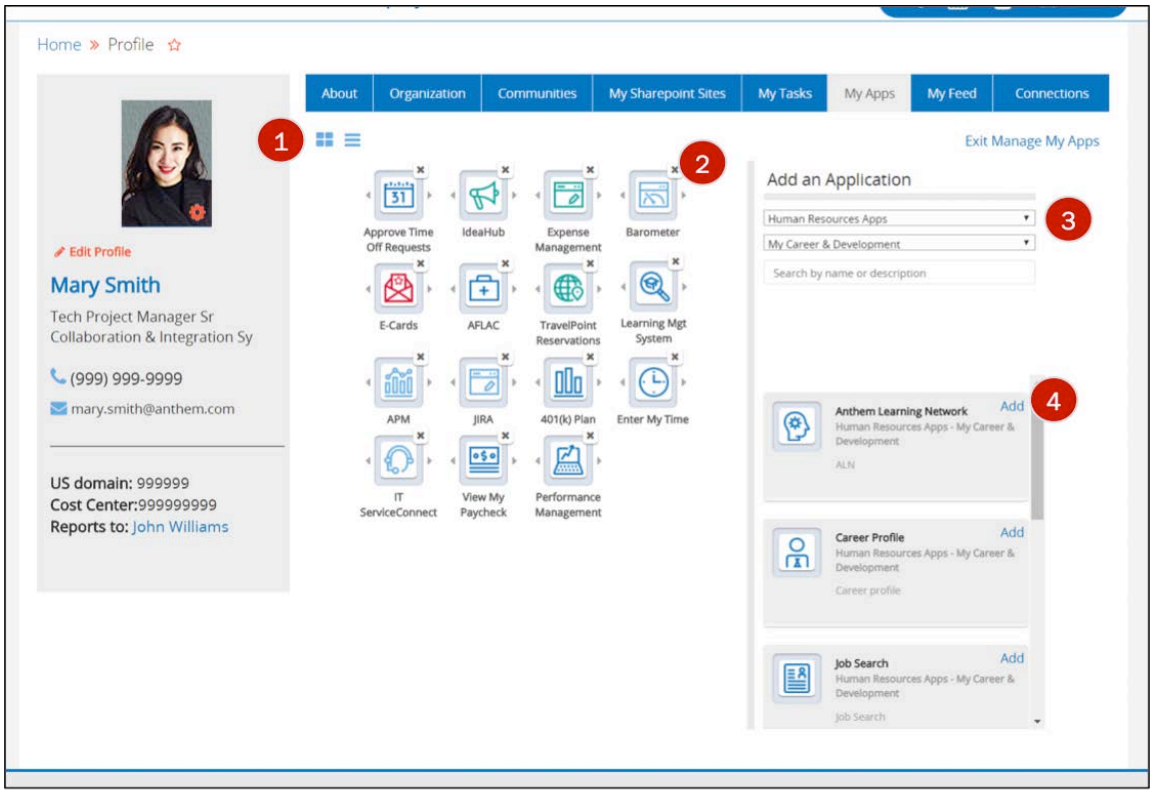




Image 45. Anthem Intranet Employee Profile *My Apps*. Users manage their applications list in the *My Apps* section of their profile document. *45_Anthem_16_profilemyapps_live.png*

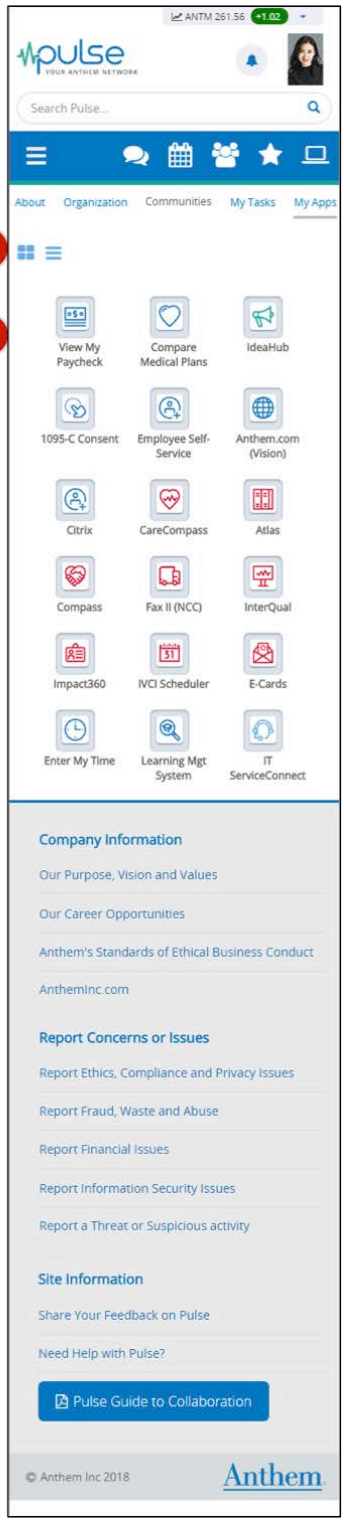
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Employee Profile *My Apps, Highlights*

The Pulse team's single sign-on lets the intranet offer users seamless access to many apps; they can organize the ones they use most in the *My Apps* section of their profile page.

1. **Views:** Icons offer a way to view the set of applications as either a list or as icons.
2. **Delete:** Users can delete any application by clicking the x icon on the app icon. To prevent accidental deleting, a confirmation asks if they meant to delete the application.
3. **Find applications:** To find applications, users can select from drop-down lists to see applications related to topics, or search in the open search field.
4. **Add:** When users locate an application they want in their set, they simply click the blue *Add* link. This adds the application to the set on the left.

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Employee Profile *My Apps*, Mobile

Image 46. Anthem Intranet *My Apps* Mobile. Users can view their apps list on mobile.
46_Anthem_17_mobileprofilemyapps_live.png

Order NNG190115-7904-48466

Employee Profile *My Apps*, Mobile Highlights

Although users cannot yet edit apps on mobile, they can access their list of apps.

1. **Views:** Users can view their applications set in a list or as icons.
2. **Application icons:** Each icon has a text label, making it easy to identify, and the icons are a large enough to make them easy to tab.

Employee Profile *Communities*, Mobile

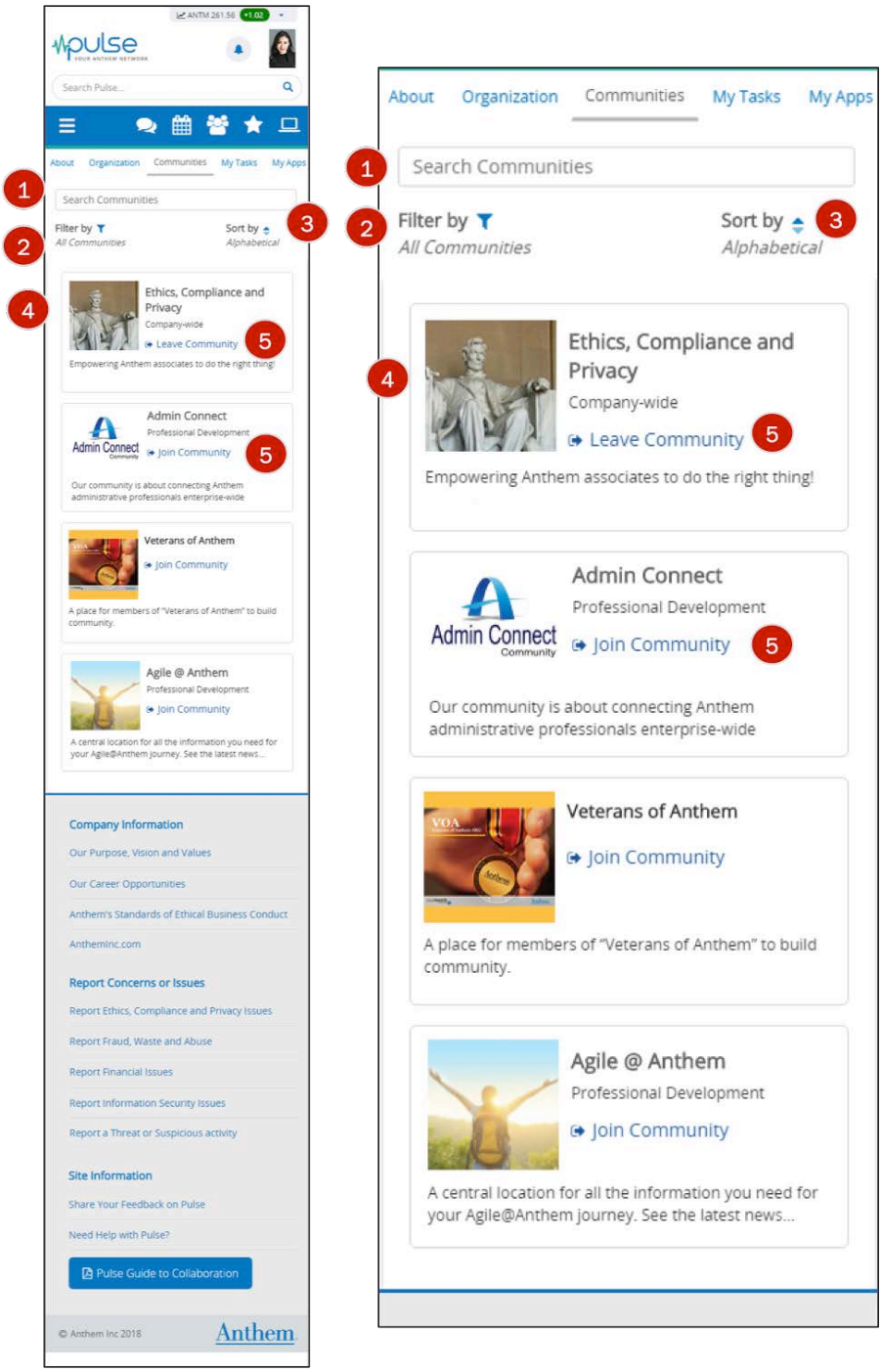


Image 47. Anthem Intranet Employee Profile *Communities*, Mobile View. Communities can help employees collaborate and engage with one another. *47_Anthem_18_mobileprofilecommunities_live.png*

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Employee Profile *Communities*, Mobile Highlights

Communities offer employees a way to collaborate online, about any project, topic, or initiative they want. Community owners work to keep the content current and relevant, which can be a challenge.

1. **Search:** If users know the topic or the name of a community, they can search for it using the special communities search feature.
2. **Filter:** A drop-down of filters lets users refine the list of communities using certain keywords.
3. **Sort:** Users can sort the list.
4. **Information:** Each community card displays the name of the community, its category (such as *Company-wide* or *Professional Development*), and a one-sentence description. An image adds a touch of flair and sometimes more information as well.
5. **Join or leave:** A blue link in each community's card urges users to either join or leave the community. If they are not yet a member, the link label is: *Join Community*; if they are already a member, the link label is: *Leave Community.* These links make it easy for users to keep their list of communities current.

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Employee Profile Organization Chart

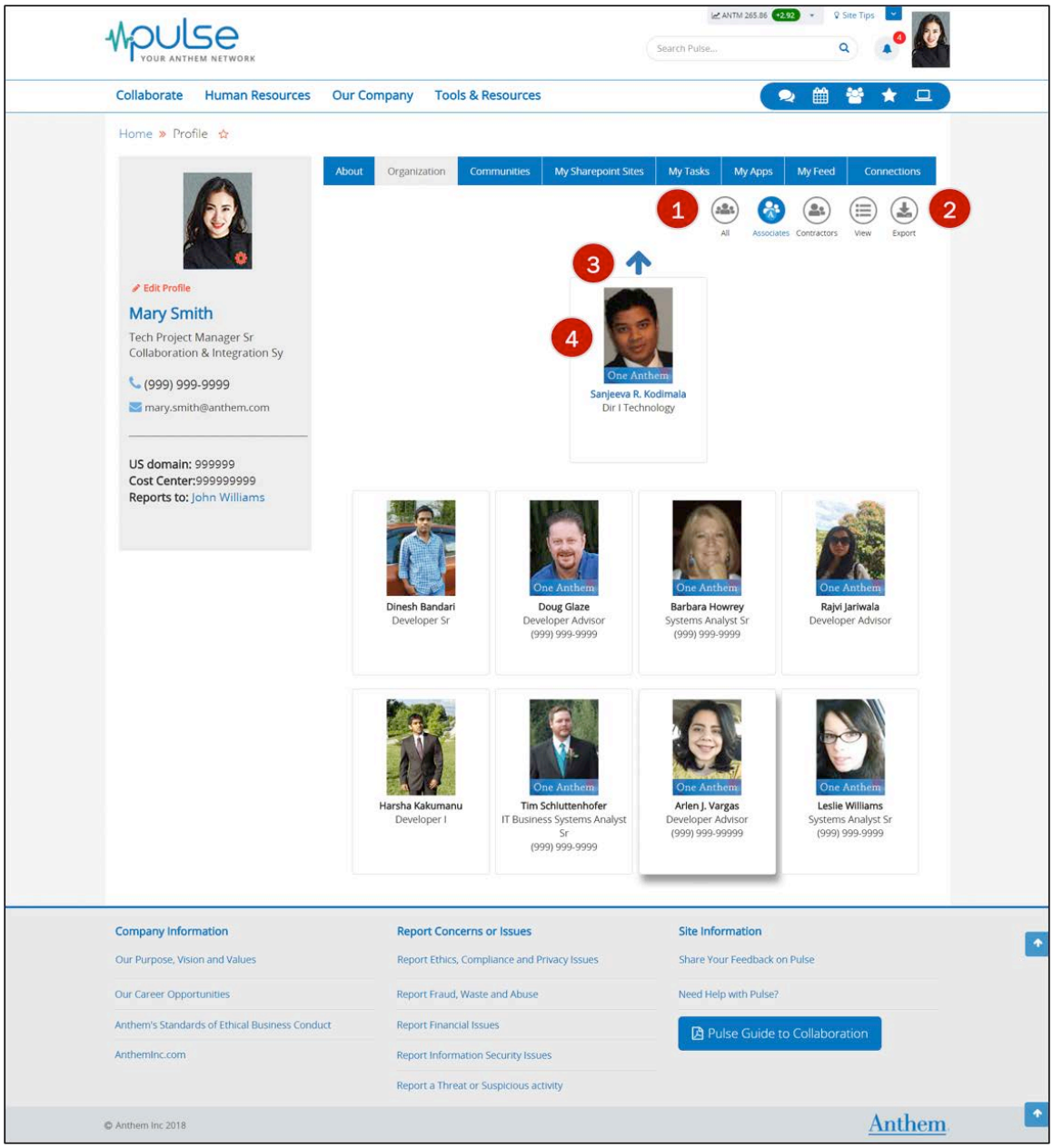


Image 48. Anthem Intranet Employee Profile Organization Chart. Organization charts are a key feature on Pulse.
48_Anthem_19_profile_orgchart_live.png

Employee Profile Organization Chart, Highlights

Larger organizations such as Anthem, which has more than 70,000 employees and contractors, often benefit from having a usable org chart feature on the intranet. Pulse's org chart functionality gives employees the lay of the land of the organization and its structure.

1. **Views:** The icons in the upper right of the org chart let users see *All* people who work at Anthem, only *Associates* (people who work for Anthem), and *Contractors.* A *View* icon lets users see the org chart as a list or in the more traditional hierarchical format complete with photos, names, and job titles. People who are more visual and want to see a small set of employees benefit from this level, while users who want to see more at once can benefit from the list view.
2. **Export:** Users can export the org chart so they can store or print it. This can help in many situations, including when planning projects, working with a new team, or looking at a reorg. Some people like to print their own section of the org chart in a team-building exercise.
3. **Up and down levels:** Clicking the blue up arrow icon at the top of the visible section of the org chart displays the chart's next highest level, while the down arrow at the bottom of the chart displays the next level down.
4. **Employee cards:** Users can click on any employee to see his or her profile document.

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Employee Profile Organization Chart, List View

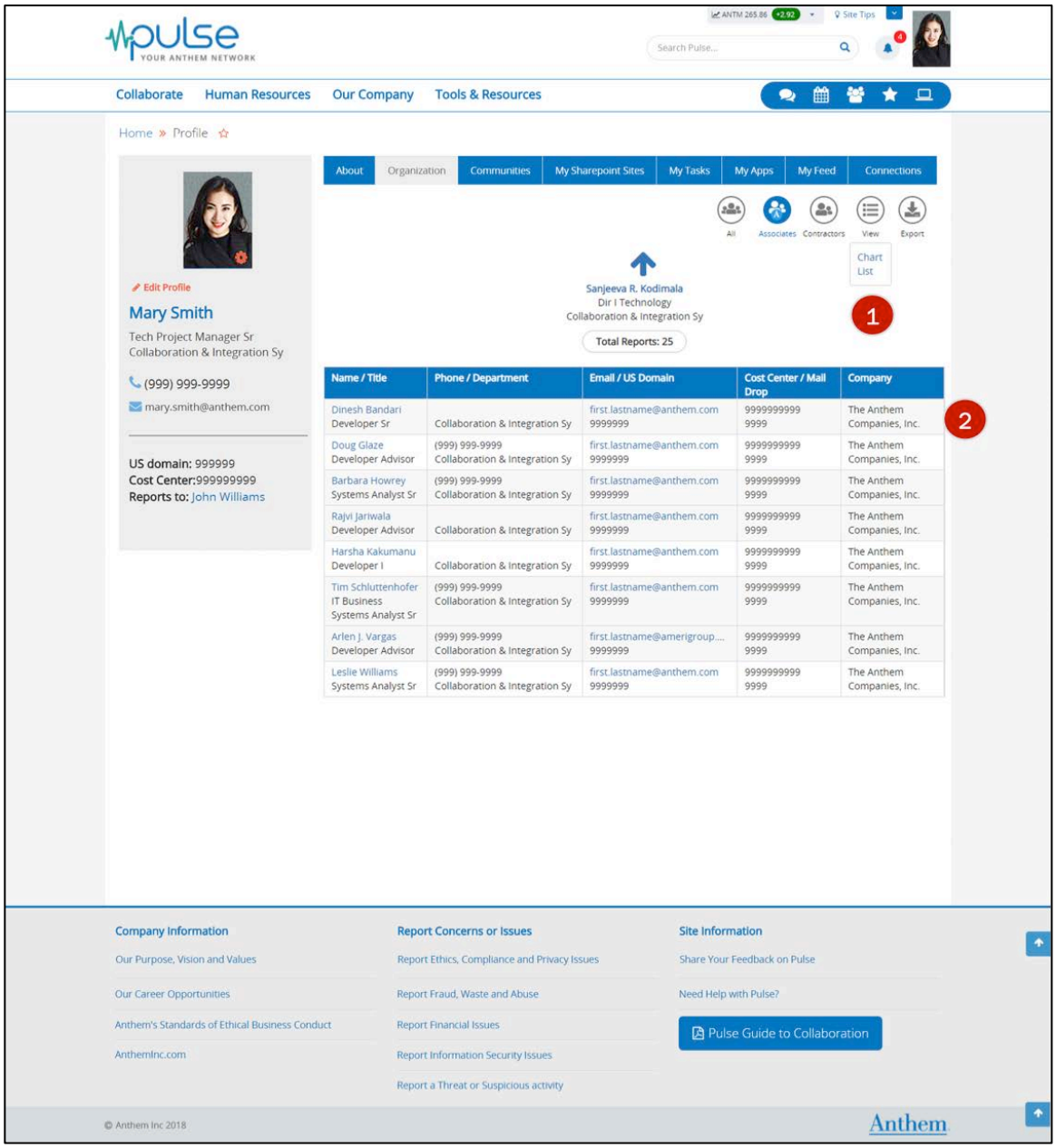


Image 49. Anthem Intranet Employee Profile Organization Chart, List View. The org chart can be displayed as a list on Pulse.
49_Anthem_20_profile_orgchart_ListView_live.png

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Employee Profile Organization Chart, List View, Highlights

The list view organizes the org chart into a table; while it shows more information about each employee, photos are omitted.

1. **Views:** The *Chart List* icon enables users to see the org chart in the more traditional hierarchical format.
2. **Employee rows:** Users can click on an employee name to see his or her profile document. Much of the pertinent information, however, is already displayed in the org chart table.

Employee Profile Organization Chart, Mobile

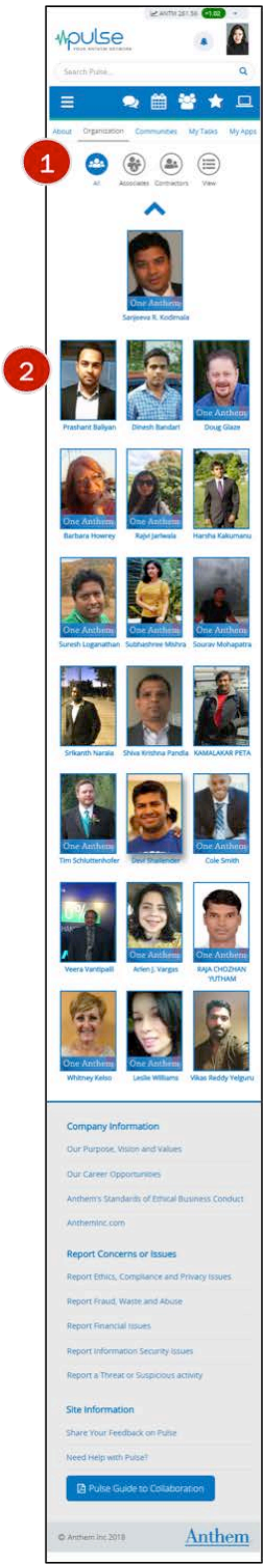


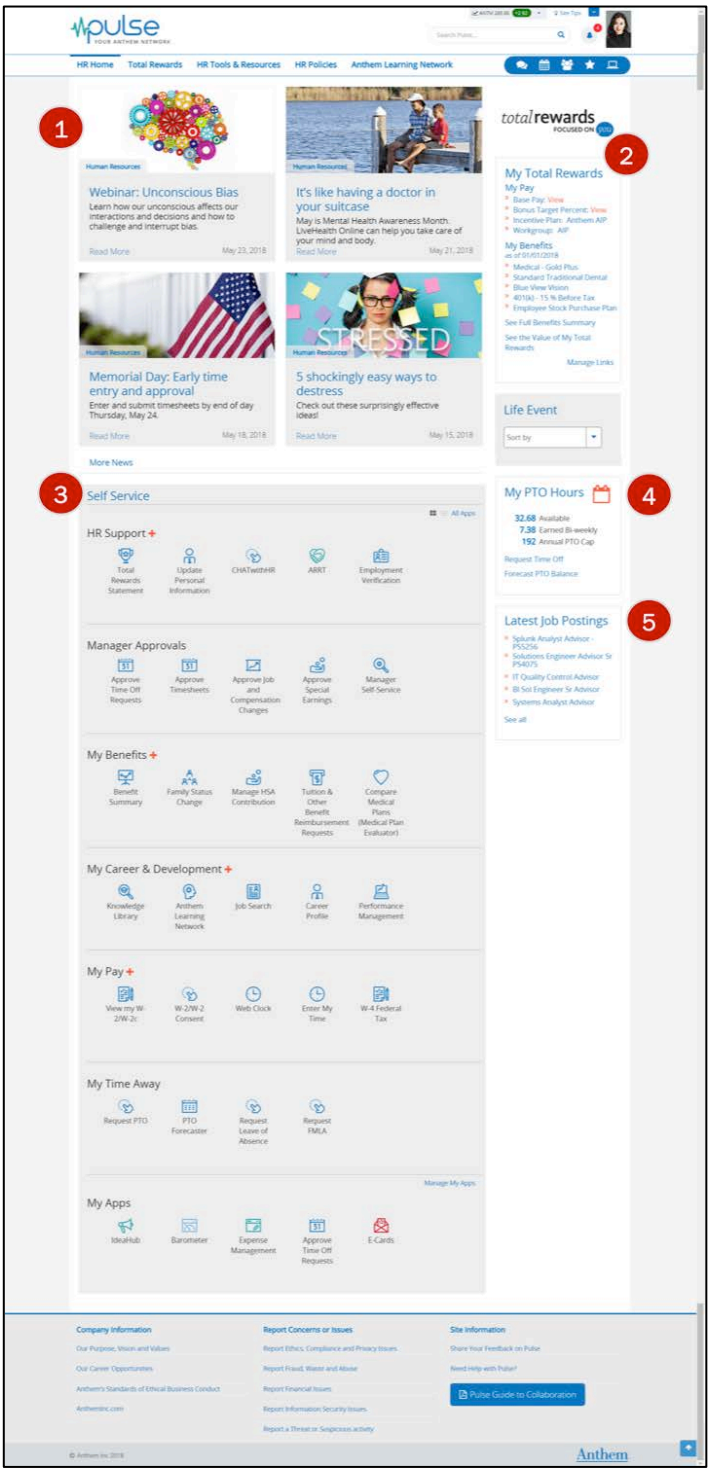
Image 50. Anthem Intranet Mobile Org Chart. It's easy to use the org chart features on mobile, too. *50_Anthem_21_mobileprofileorgchart_live.png*

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Employee Profile Organization Chart, Mobile Highlights

The representation of the org chart features on mobile is similar to that on desktop, but everything is shrunk to fit the small screen and the export feature is omitted.

1. **View icons:** The icons on mobile are like those on desktop, but their position shifts left so that they appear in the top center. The icons are large enough to see and tap on mobile.
2. **Employee cards:** Due to space constraints, the org chart cards display a little less information about each employee on mobile, but users can click on an employee card to see the profile.



Human Resources

Image 51. Anthem Intranet Human Resources. Employees can have all of their HR needs fulfilled on Pulse's vigorous HR section. *51_Anthem_22_personalization_live.png*

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Human Resources, Highlights

Pulse's HR section provides a highly comprehensive set of information, tools, and self-serve tasks. Most importantly, it consolidates HR resources in one place—a place that is one of the most visited on the intranet.

Announcements (such as a special deadline for timesheets) and webinars on topics related to employee welfare (such as unconscious bias) increase employee awareness of the many services and options available to them. HR features also help employees take control of their benefits and use them to their best advantage, which contributes to keeping employees happy. The HR section's design makes accessing HR information easy, which takes stress off the HR department employees.

1. **Promoted content and news:** At the top of the HR homepage, four large sections showcase promoted HR initiatives and news. Information featured here includes topics such as how to tend to one's mental health using online tools and how to eliminate stress. This section demonstrates that the organization cares and wants to cultivate employees and help keep them healthy. Employees who want to read more HR-related news can click the *More News* link at the bottom of this section.
2. **Benefits and pay:** The *My Total Rewards* section in the right rail is no area to be ignored. It includes links to the user's personal pay and benefits information. To remind users about all of their benefits and the benefits' value, this information is consolidated and accessible via the *See Full Benefits Summary* and the *See the Value of My Total Rewards* links at the bottom of this section. *Manage Links,* at the very end, allows users to customize the set of links that appear in *My Total Rewards*.
3. **HR dashboard:** Much of the HR page real estate is reserved for the grey *Self Service* section below the HR news. Each section houses links and icons related to important HR activities and tools—offering pretty much anything an employee might need from HR. Among the topics are personal information, timesheets, family status change, training, performance management, job search, time-off request, and management-related tools. Each section has a subtitle indicating what it's about, which makes the page easy to scan. The consistent visual layout—spacing and a grey line between each row, and five or four icons per row—make the page easy for users to scan and use.
4. **Time off:** In addition to its inclusion in the dashboard, paid time-off information appears in the right rail. The *PTO* section helps users manage their time off, helping them plan so that they can recharge both their brain and body. It displays how much paid time off employees have accumulated, how much they earn every two weeks, and the caps placed on the amount they can earn per year. The *Request Time Off* and *PTO Balance* links help users take action related to time off.
5. **Job listings:** The *Latest Job Postings* section shows Anthem's five most recent jobs openings and a link to *See all.* Employees are often the best recruiters for jobs, so this is a smart section to show in the HR area. Also, good employees who want a new challenge can throw their hats in the ring.

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Tools



Image 52. Anthem Intranet Tools. *Tools & Resources* for Anthem's wide variety of job roles are consolidated in one section of the Pulse intranet. *52_Anthem_23_toolsandresources_live.png*

Order NNG190115-7904-48466

Tools, Highlights

HR isn't the only department that provides resources for Anthem employees. IT, purchasing, security, facilities, PR, and legal are a few of the groups that often work with or counsel Anthem's many employees. Pulse's *Tools & Resources* section helps increase employee awareness about what they need to do. It also consolidates many of the tools that employees with diverse jobs need—from brand standard guides for communications professionals to medical policies for nurse case managers—so there is no need for users to hunt around to complete common tasks.

1. **Breadcrumb:** The breadcrumb at the top displays where users are in the IA and also acts as the page title. This, combined with the selected global navigation menu (which has a thin blue bar above it to distinguish it from unselected menus), acts as an anchor to tell users where they are in the UI.
2. **Promoted content:** Two news items or internet initiative promotions appear at the top of the *Tools & Resources* page. The *More Tools & Resources News* link below leads to additional news items.
3. **Popular tools:** Links to the most popular tools are consolidated in the *Top Tools* section in the right rail.
4. **Policies:** The most important Anthem policies, which all employees should be aware of, are listed in the *Our Policies* section.
5. **Issues:** Employees are encouraged to report issues that need attention—from ethics to fraud to finance. Links to some areas to report potential issues appear in the *Report an Issue or Contact* section in the right rail. This section lets employees know that it's okay for them to report something they feel is not right. Having links on Pulse takes away the stigma of reporting an issue, legitimizes the process, and provides further information about how to identify issues and what to do.
6. **Tabbed section:** The familiar blue in-page tab UI, seen on several Pulse pages, presents various tool and resource categories. The links—*Information Technology, Human Resources, Purchasing & Expenses, Facilities & Security, Brand/Comms/PR,* and *Legal/Ethics & Compliance*—cover the gamut of topics for which employees need tools and resources.
7. **Links:** Each tabbed section offers a comprehensive set of links related to the main topic. While lists may be long, hunting in a list is far faster and easier than hunting across a large organization.

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Community Search

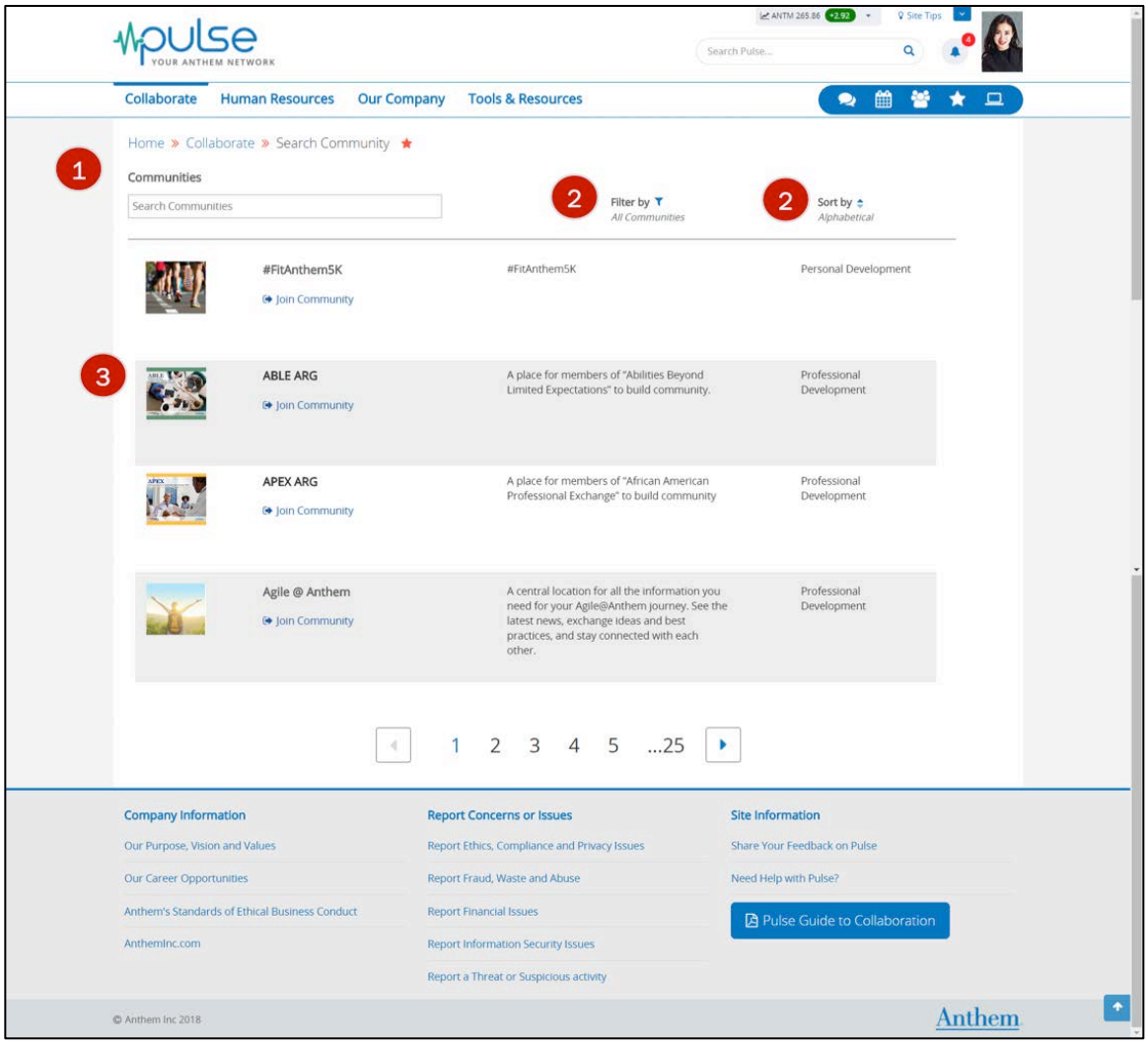


Image 53. Anthem Intranet Community Search. Users can search for any topic to see if a related community exists.
53_Anthem_24_searchacommunity_live.png

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Community Search, Highlights

The community search feature makes it possible for people to find communities they need or are interested in. It's also a helpful safeguard against duplicate communities, as potential new community owners can search to ensure there is not already a community like the one they plan to create.

1. **Page name:** Users can find the community search feature in the intranet's *Collaborate* section. The *Communities* page name helps remind users that they are searching specifically for communities and nothing else.
2. **Filter and sort:** The filter and sort features in the upper right come in handy when the search returns many community results related to the user's query.
3. **Result:** Each result displays the community name, the option to *join the community* right from the SERP, information about the community, and the category it falls under. This information can help users determine whether a community is right for them.

Community, Resources

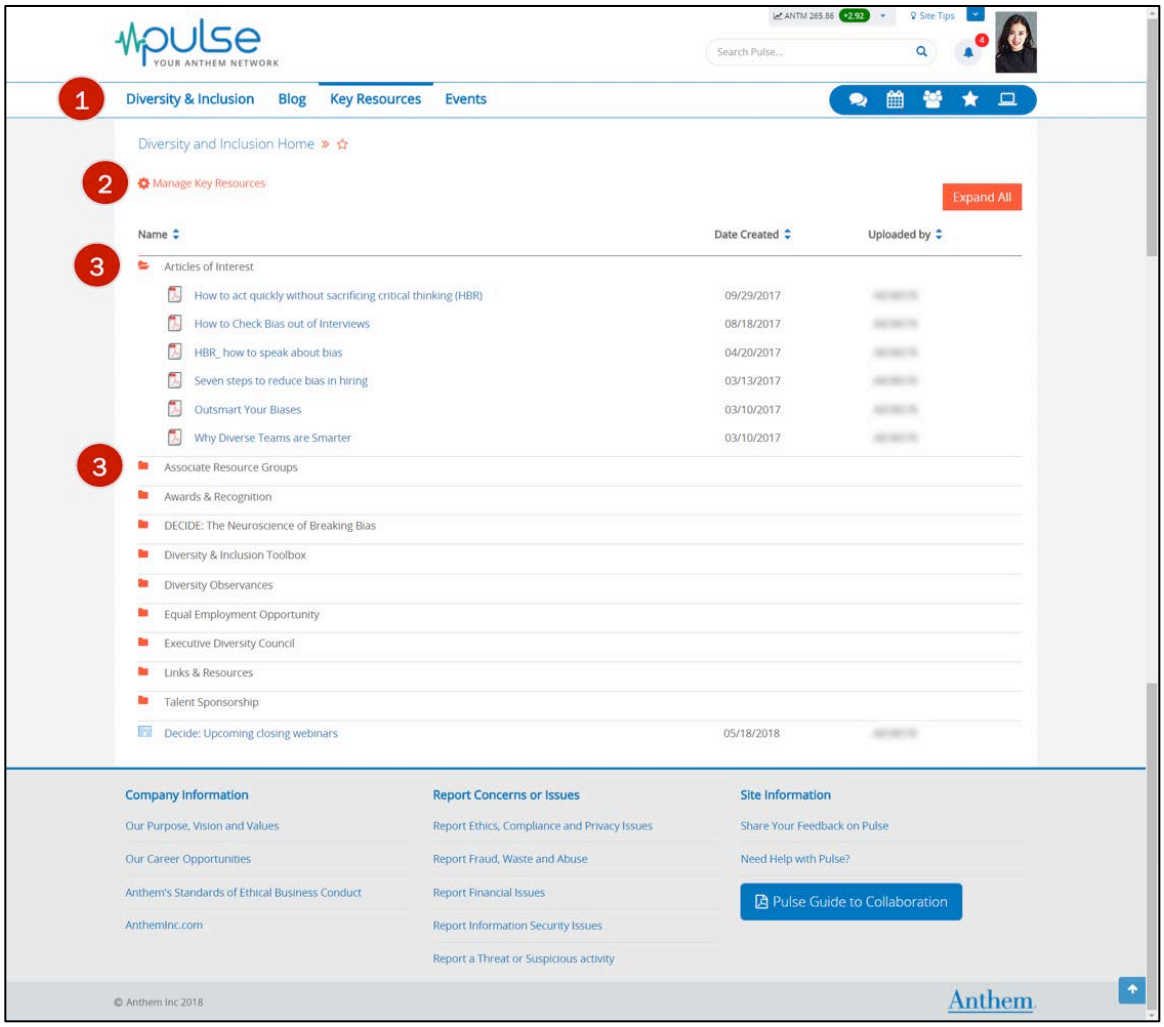


Image 54. Anthem Intranet Community Resources. Communities each have a section in which owners can post resources for members. *54_Anthem_25_communityshareresources_live.png*

Community Resources, Highlights

Pulse lets employees set up communities for projects and initiatives. Each community has a section where owners can post resources so that members can easily locate them. These resource sections are popular; in fact, many of the 22,000 pieces of content on Pulse are these key resources.

1. **Navigation:** The navigation menu in each community includes the main page (usually the community name), a *Blog, Key Resources,* and *Events*.
2. **Manage resources:** On the *Key Resources* page, community managers can add, remove, and categorize the resources in folders. Managers can access these features via the orange *Manage Key Resources* link at the top of the page.
3. **Folders:** Resources appear in folders, which can be expanded (to show the list of items in them) or collapsed (to hide them).

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Manage Community Resources

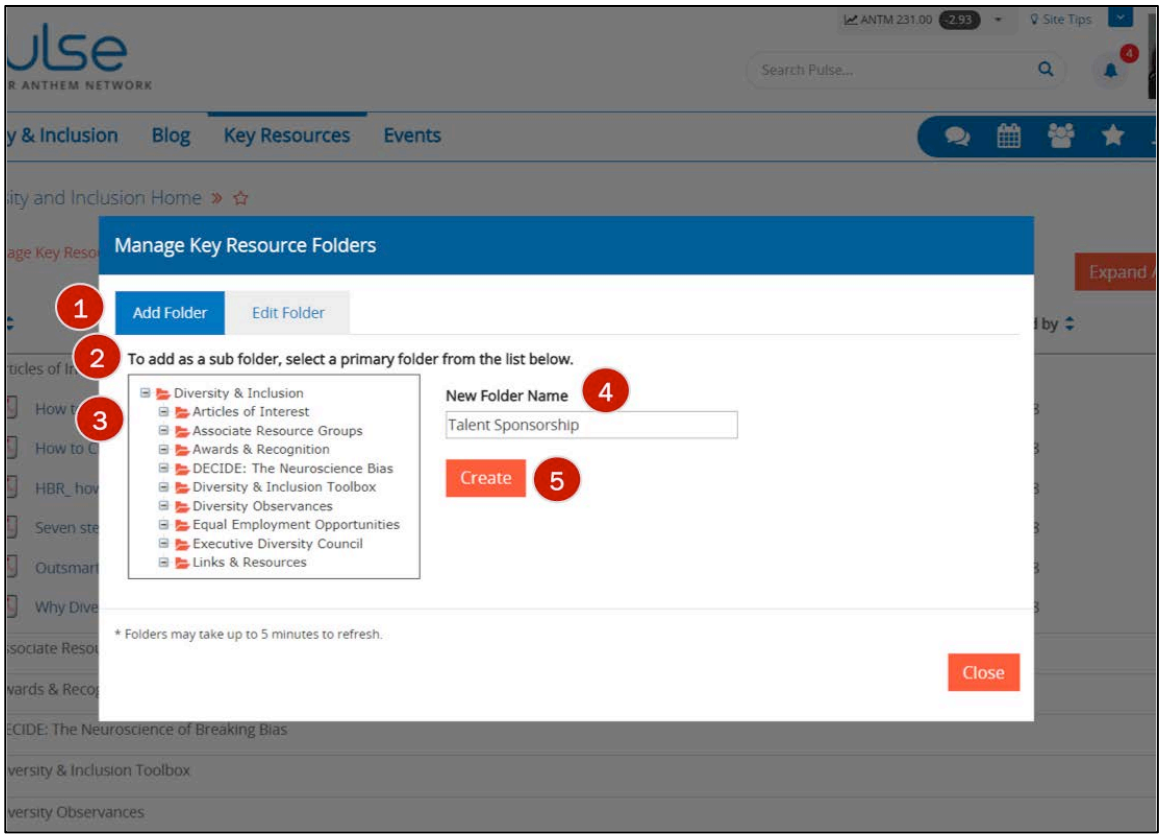


Image 55. Anthem Intranet Community Resources. Simple commands in the lightbox allow community owners to manage key resources on the Anthem intranet. *55_Anthem_26_communityshareresources_live.png*

Manage Community Resources, Highlights

Community owners can edit folders in a simple UI.

1. **Tabs:** Familiar blue tabs offer to *Add Folder* or *Edit Folder.*
2. **Instructions:** A sentence communicates how to add folders and position them as desired.
3. **Folder display:** All the current folders show in a list, making it easy for users to see the types of resources already created.
4. **Field:** The *New Folder Name* label makes it easy for users to know what to type.
5. **Create:** The orange *Create* button is visible and obvious.

Comment

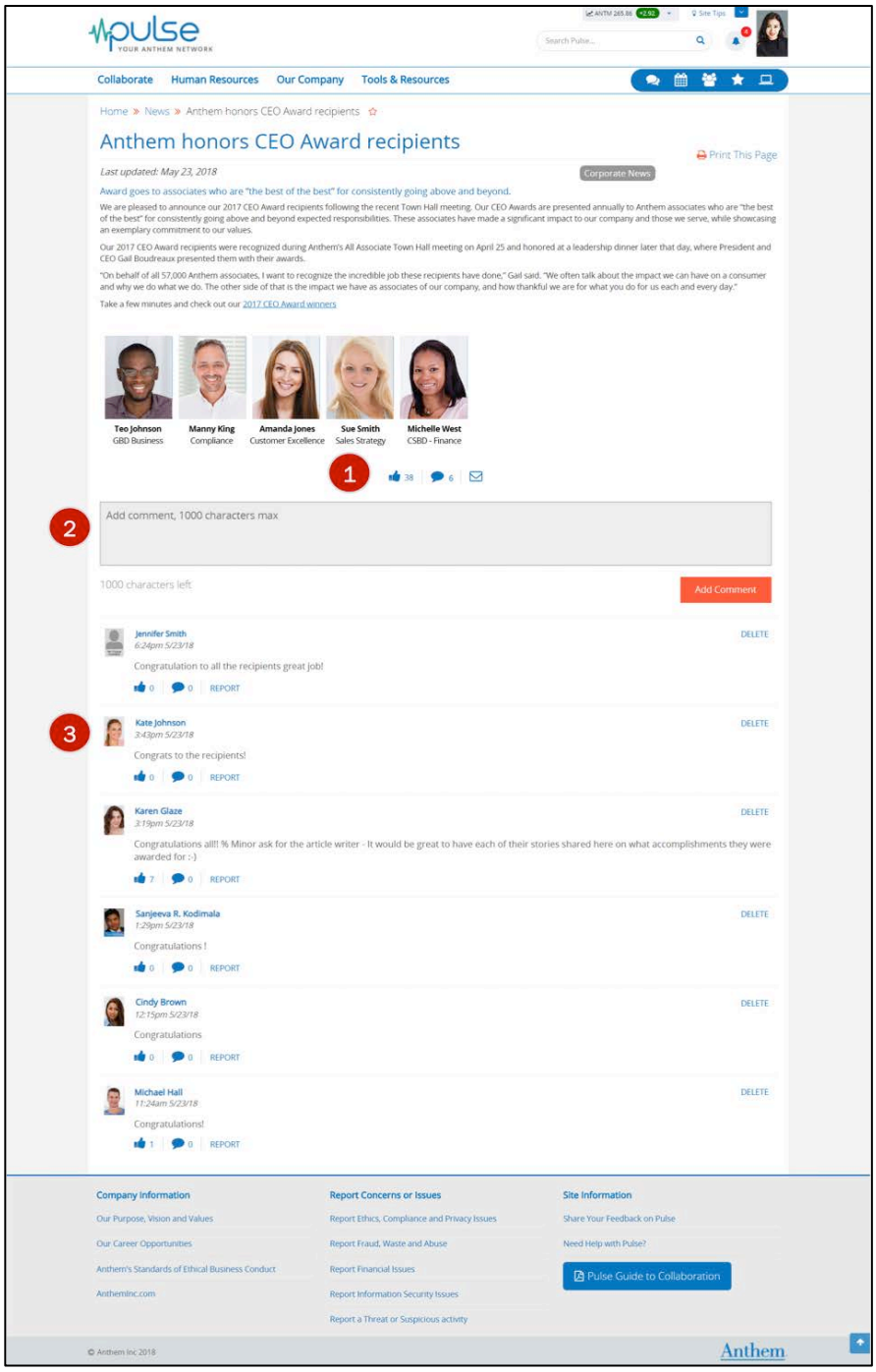


Image 56. Anthem Intranet Comment Function. Employees can like and comment on news. *56_Anthem_27_social_commentlikeshare_live.png*

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Comment, Highlights

Communities are not the only collaboration option. Employees can like and comment on news items via a simple commenting UI.

1. **Comments and likes:** The current number of comments and likes is indicated just below the article.
2. **Field:** A comment field below the article invites employees to engage with the content.
3. **Comments:** Seeing other people and their comments can be interesting for employees to read. Comments also inspire people to join in and comment themselves.

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Company Page

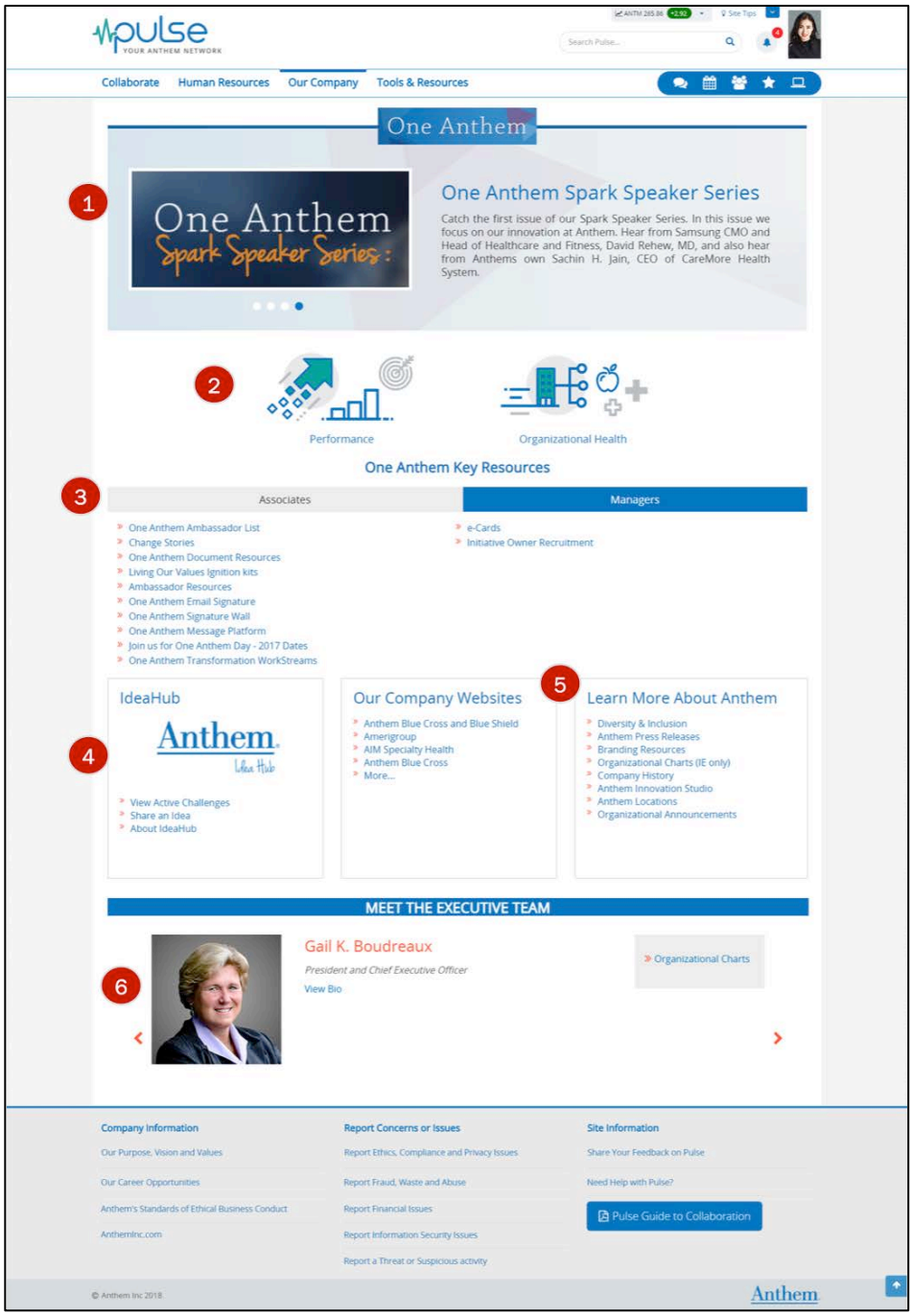


Image 57. Anthem Intranet Company Page. The company page houses key information about the organization. *57_Anthem_28_ourcompany_live.png*

Company Page, Highlights

One might assume that employees should just know about the organization at which they work, but many don't know as much as they could or should. Intranets are a great way for employees to learn more and be reminded about how their organization works and how well it is doing. Anthem is forthcoming in providing company information to employees. The Pulse *One Anthem* page offers myriad information about the company that employees can easily peruse.

1. **Promoted content and initiatives:** The top of the *One Anthem* page promotes a business initiate—such as a speaker series with experts in various business topics.
2. **Company performance and health:** Executives share information about how the company is doing in terms of *Performance* and *Organizational Health.* This type of information helps employees set their priorities and better understand business decisions that are being made. Sharing this type of information with employees helps them feel informed, respected, and valued.
3. **Tabbed section:** The familiar blue in-page tabs in the *One Anthem Key* Resources section show links to sections for *Associates* (employees) or *Managers* and lists cool initiatives and need-to-know processes. The *e-Cards* feature allows employees to send each other thank you and congratulatory cards.
4. **Ideas:** The *IdeaHub* card offers links to a program that inspires employees to suggest new ideas. This is a great way to let employees stretch their creativity, and for managers to find out about poor processes and possible solutions.
5. **More Anthem information:** The next two cards on the page share links to company websites and more information about the company, including its history and locations.
6. **Executives:** The *Meet the Executive Team* section at the bottom of the page displays the president and CEO's name and photo, as well as a link to her bio. Orange arrows let employees scroll through to other executives, while the *Organizational Charts* button leads to the full org charts. This area is a great way for employees to get acquainted with the people who captain the ship that is Anthem.

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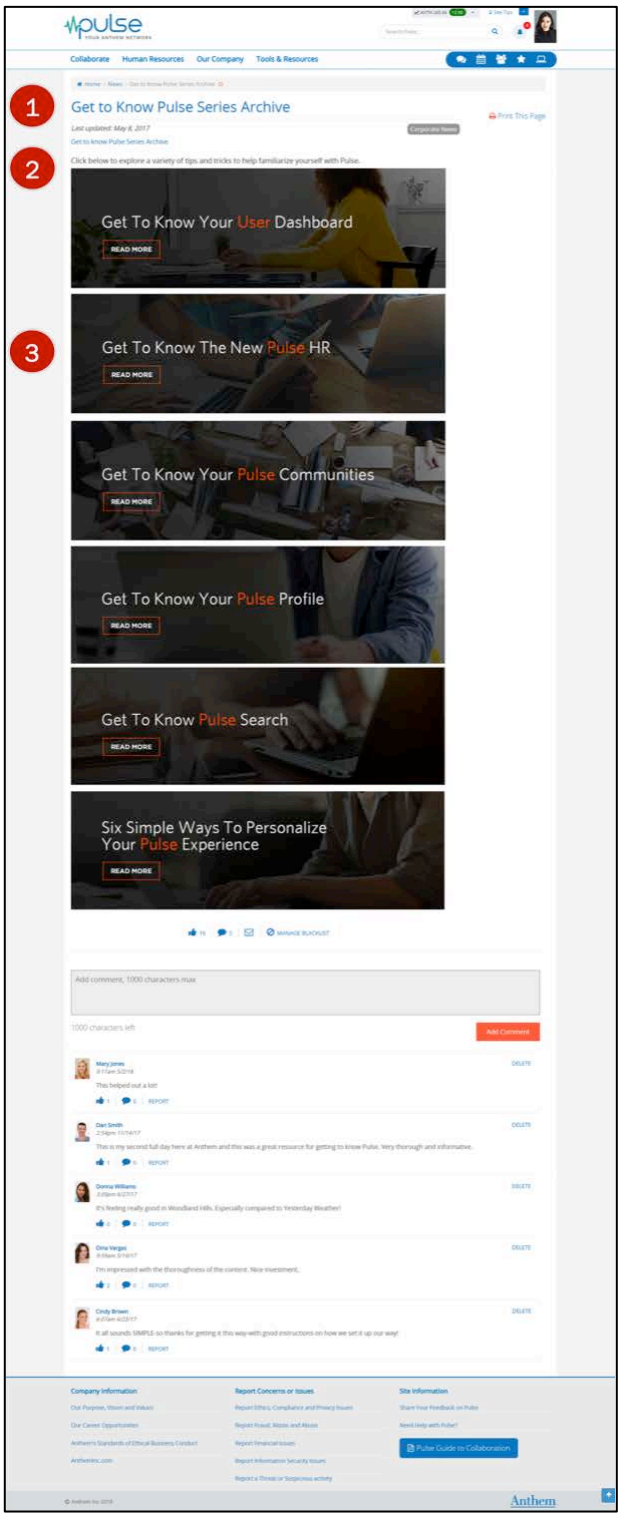


Image 58. Anthem Intranet Help. The *Get to Know* Pulse series offers tips and tricks for optimal Anthem intranet use. *58_Anthem_29_gettoknowpulse_live.png*

Help and Promoting Intranet Features, Highlights

Sometimes the best way to make users aware that features exist is to tell them. The *Get to Know Pulse* series does just that. These articles give tips and help related to the Anthem intranet's many features.

1. **Archive:** All the articles about Pulse are consolidated in the intranet's *Get to Know Pulse Series Archive* section.
2. **Instruction:** One simple sentence encapsulates why these articles are helpful and what the user should do.
3. **Titles:** The titles in each large card indicate the feature that the module describes.

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DESIGN PROCESS AND USABILITY WORK

Let UX Lead the Charge

Iterative wireframe sessions and feedback from several focus groups conducted at the start of the redesign project informed decisions about Pulse's feature roadmap. The wireframe design brought together key stakeholders from the site's different areas and helped speed up specification gathering. This process worked well, reducing weeks' worth of business analysis into an average of two sessions, in which the team identified and approved features that would meet the needs of each area. To maximize session productivity, the team's UX lead took loosely documented requirements and designed wireframes to represent the interface structure of each feature using Balsamiq Mockups. This approach helped stakeholders provide feedback during each iterative review and revise session. These mockups ultimately morphed into polished schematics that were applied to the site design. Almost every element of Pulse went through this process; this let the design be driven by those who specialize in UX rather than by committee, and resulted in a clean look and easy-to-use features.

The biggest insight that emerged from the research activities was that the design must be intuitive for people to use. Industry best practice research showed this as a common thread among successful intranets. The team also worked hard to ensure that the site was not over-engineered. It took the most important tasks, prioritized them, and then prioritized them again throughout the design process. This is a practice that the team still uses today, as the site continues to be refined.

Getting Buy-In

Change management was a focus throughout the Pulse creation process. To ensure the project would be a success, the Pulse team formed a Change Management Workstream early on that met regularly. Key milestones and touch points were identified up front, and these helped guide the project and keep it on track. Because people had been using the old platform for so long, the team knew there might be adoption—or even acceptance—issues. To combat this, the team kept the site intuitive and simple, and also developed a series of communications that were delivered to users pre- and post-launch.

Because associates were eager to experience Pulse and the team didn't want to operate in a complete vacuum, it offered a series of interactive Pulse Sneak Peeks leading up to launch. Associates were able to experience Pulse in a virtual setting with limited functionality over the course of three in-depth interactive sessions. After launch, the team ran an eight-week *Get to Know Pulse* series that focused on different Pulse areas and offered helpful tips along the way.

The team also called on the Pulse Ambassadors to help out on launch day. These employees served as Pulse experts who could help answer associates' questions. And, of course, the ambassadors were given early access to Pulse to help prepare them for their duties.

The team also created a comprehensive Site Wizard to help associates through the adoption process. Because Pulse has so many potential users, the team wanted to try to avoid having too many people contact the help desk or email the Pulse inbox

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with their questions, as those channels would likely become overwhelmed. The Site Wizard proved to be a helpful tool and is still active today.

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Buck Consulting An HR benefits consulting firm	• Landing page design and HR benefits access
FishBowl Solutions IT development and implementation team	• Oracle WebCenter customization and unique personalization that aligned with the overall vision for Pulse
Pulse Point Group Change management consulting firm	• Change management • User surveying • IT project management

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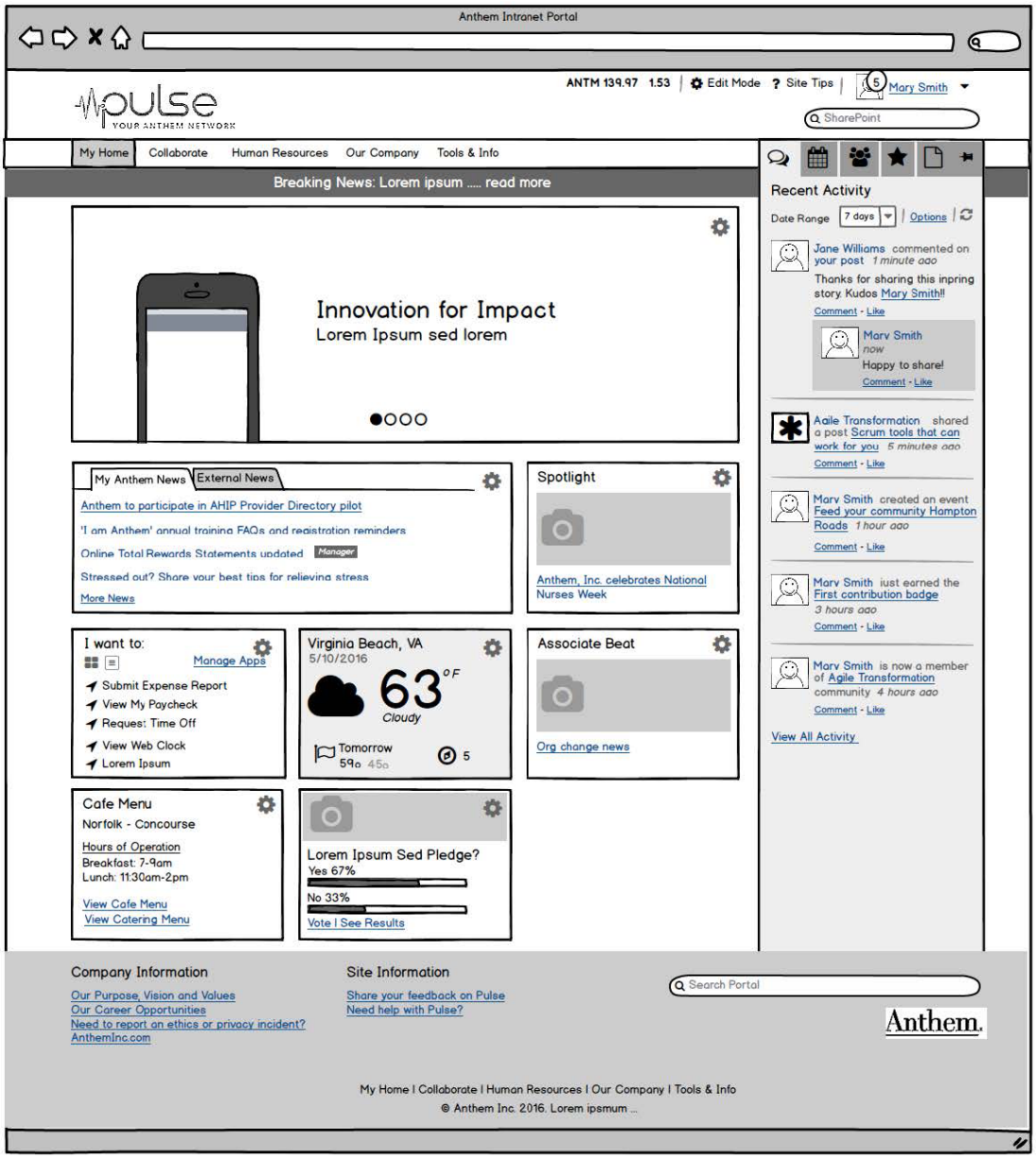


Image 59. Anthem Intranet Homepage Wireframe. This homepage wireframe, created using Balsamiq, was part of the team's design workflow. Wireframes such as this helped the team discover the best solutions faster. *59_Anthem_30_homepage_wireframe.png*

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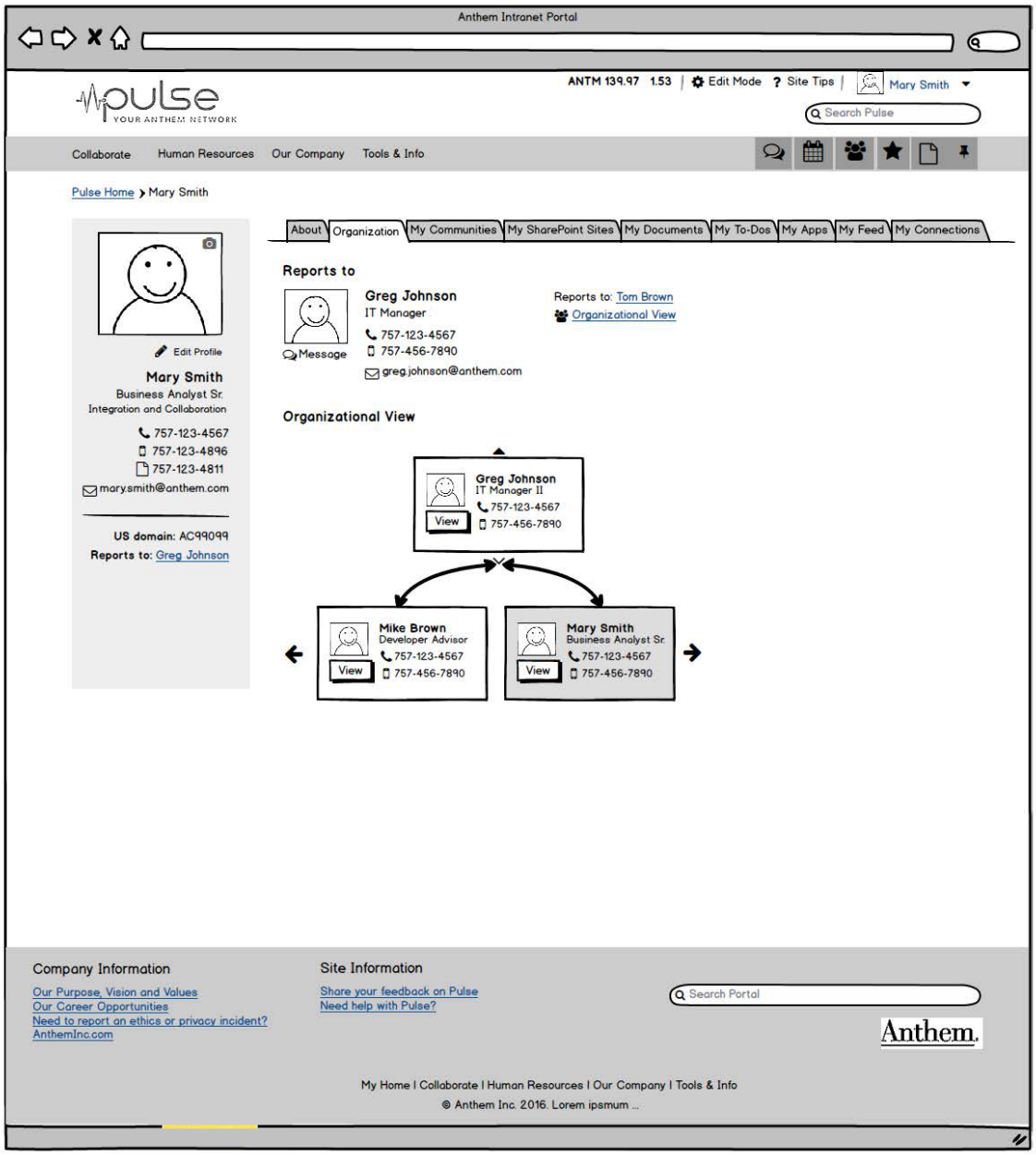


Image 60. Anthem Intranet Profile Page Wireframe. This is the Balsamiq wireframe created to help design the user profile page organization tab. *60_Anthem_31_profile_wireframe.png*

GOVERNANCE

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Development Team	A small cross-functional team of developers, testers, and other specialists working collaboratively to deliver a vertical slice of functionality.
Product Owner (PO)	The content authority for the Team Backlog and the only team member empowered to accept Stories as done. Also: • Defines Stories and prioritizes the backlog
Scrum Master	• Helps the team remove impediments, facilitates team events, and fosters an environment for high-performing teams
System Team	A special Agile team that provides assistance in building and using the Agile development environment, including continuous integration, test automation, and continuous deployment. This team: • Assists with the integration of assets from Agile teams • Performs end-to-end solution testing as needed • Assists with deployment and release
System Architect/Engineer	An individual or small cross-discipline team that truly applies systems thinking and also: • Defines the system's overall architecture • Helps define nonfunctional requirements • Determines the major elements and subsystems • Helps define the interfaces and collaborations among them
Release Train Engineer (RTE)	Servant leader and chief Scrum Master for the train. In this role, the RTE: • Facilitates optimizing the flow of value through the program using various mechanisms, such as the Program Kanban, Inspect & Adapt workshop, and PI Planning
Lean User Experience Team	• Embraces a mindset, a culture, and a

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	process of Lean-Agile methods • Implements functionality in minimum viable increments and determines success by measuring results against an outcome hypothesis

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://pulse.antheminc.com
Default Status	By default, all Anthem associates have Pulse set as their homepage and cannot change this setting. A shortcut to Pulse is placed on each associate's desktop.
Remote Access	Associates can access Pulse from anywhere using two-step verification for security (log-in credentials and a one-time passcode sent via a preferred method, such as to a phone). Some Pulse content is not viewable outside of the Anthem network to ensure proper site security. However, applications such as HR transactions and expense reporting are externally available through Pulse.
Shared Workstations	Some corporate offices provide shared computer facilities to be used during breaks. Although not widely used, Pulse is accessible via these workstations.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
November 2005	• Launch of WorkNet
September 2014	• Collaboration (commenting and liking) added to WorkNet's news articles; homepage refresh
May 2016—April 2017	• Redesign of Pulse (v.1): branding overhaul, IA, new features
April 2017	• Launch of new design
April 2018	• Redesign of main header, footer, and primary navigation, including reducing header height by half, consolidated profile photo section, and introduction of sticky navigation • Mobile responsiveness and accessibility improvements to main page template
July 2018	• Enhanced photo upload tool, including cropping and resizing, and an upgraded UX • Configurable widgets
September 2018	• Launch of Pulse (v.2)
Overall redesign timeframe: 1 year	

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CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Contributors	Pulse currently has 364 contributors. The Corporate Communication team member who oversees each business area selects contributors for the *Our Company*, *HR*, and *Tools & Resources* sections. Few, if any, Pulse contributors work full-time on the intranet; people contribute to their intranet areas on top of their standard job requirements. Also, any employee interested in having a community can request one and contribute to its content.
Encouraging Contribution	Each area or community can have one or more people contribute content. Contributors are motivated from the top. Each section on Pulse has accountability for its own content within the intranet's distributed contribution model. Almost all intranet areas are also engaged with and encouraged by the site's partnership with Corporate Communications.
Training	Anyone who wants to be a contributor must attend training. The training lasts two hours and is held through a conference call and Skype for Business screen share. The Pulse Trainer shows attendees how to contribute various types of content, and the intranet's *Pulse Training Community* section provides a library of PDFs for all contributor tasks. Once people have completed the training, they are granted contributor access to Pulse.
Maintaining Quality	The Pulse Admin audits content on a regular basis. If content is outdated or poorly displayed, the admin contacts the contributor and works with that person to improve the area.
Culling Content	When the team moved from the more than 10-year-old WorkNet to the new Pulse, it essentially started from scratch. Outside of core business documents, which are meticulously maintained and heavily regulated, only minimal content was migrated. The vast majority of content was recreated in the new system. The team engaged with contributors in the site's major areas, and Corporate Communications partners rewrote and updated much of the content. The switch also reduced the number of contributors significantly.

	The old content was all archived per a document-retention policy and could be retrieved if needed for audit. This start-from-scratch approach was somewhat dictated by the fact that the legacy system was so old that the team did not have an automated system for identifying and updating old content. Recreating the content was a lot of work, but it was worth it for quality purposes—and ultimately satisfying to start with a clean slate.

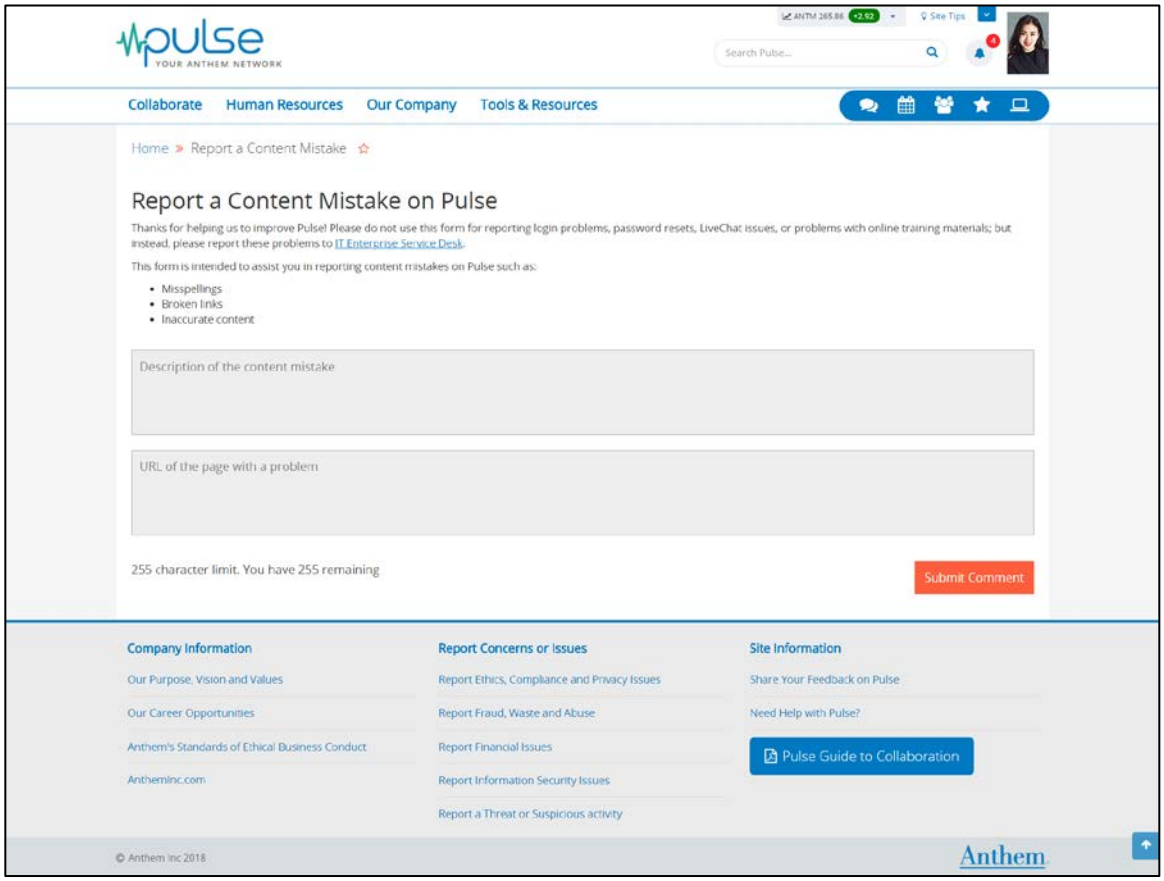


Image 61. Anthem Intranet Site Feedback Form. Users can report feedback directly through the site. A button for this feedback form can be found on nearly every page. *61_Anthem_32_formreportcontent_live.png*

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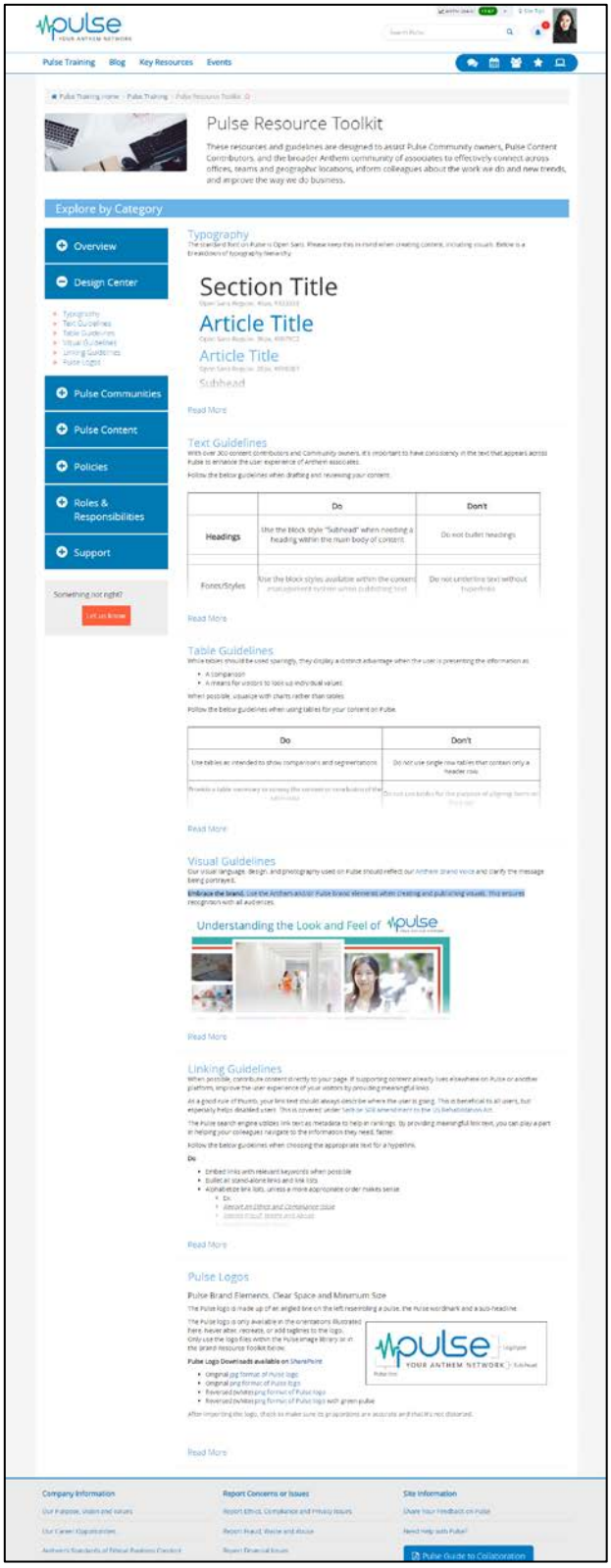


Image 62. Anthem Intranet Resource Toolkit. The *Pulse Resource Toolkit* lists resources and guidelines to assist Pulse community owners, Pulse content contributors, and the broader Anthem community of associates to effectively connect across offices and improve the way business is done. *62_Anthem_33_pulseresourcetoolkit_live.png*

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Web Tier: IBM HTTP Server • App Tier: Oracle WebLogic Server 12c • Operating System: Redhat Enterprise Linux Server release 6.8 (Santiago) • Hardware: AMD 64 • Database: Oracle 12c RAC Enterprise DB
Bug Tracking / Quality Assurance	• Bug Tracking & QA: JIRA Atlassian • Monitoring: Splunk, CA APM, Wily • Documentation: Confluence Atlassian
Design Tools	• Architecture Design: Microsoft Visio 2013 • UX Design: Adobe Photoshop, Balsamiq, InVision
Site Building Tools	• Eclipse, Oracle JDeveloper 12c, Web Storm, Microsoft VS Code, Atom IDE
Content Management Tools	• Oracle WebCenter Content 12c
Search	• Google Search Appliance (GSA)
Other Functions	• App Tier Caching: Oracle Coherence Caching 12c • Web Tire Caching: Apache Module Caching

Technology Migration

The Anthem team's technology migration progressed as follows:

- Migrated legacy application from unsupported technology (Oracle Content Server 10g) to the next-generation intranet platform (Oracle Content Server 12c) by launching automated content migration and enhancement.
- Upgraded and migrated legacy application from Windows platform to Linux for better security and performance.
- Introduced architecture transformation foundational framework to replace the third-party licensed products with more reusable components in an Agile System Development Life Cycle (SDLC).

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- Replaced Google Search Appliance (GSA) with Elastic Search as an enterprise search solution as GSA was scheduled to reach the end of its life support at the end of 2018.

MOBILE

When designing Pulse, the team took a design approach that emphasized the optimization of the desktop experience first, and then mobile. The majority of users access the site via their desktop daily; while the team knew that mobile would be nice to have, it was important to have a solid desktop version first. The team entertained the idea of a mobile app for a few months, but stepped away from that idea. Instead, it set out to make the desktop version best-in-class and marry it with a responsive web design. While focusing on the responsive design, the team also sought to identify which aspects of the site would be utilized most in the context of a responsive mobile experience. It ultimately determined these aspects to be the people finder and org charts.

Target Platforms and Devices

The Anthem design team wanted Pulse to work across all devices and be specifically optimized for company-issued devices. It therefore adopted the following mobile screen sizes as the target platforms: iPad Pro and iPhone 8 and later.

The team also conducted testing on Android for those associates accessing the intranet through personal devices.

ROI

Aside from the obvious benefit of Pulse providing Anthem with a much-needed intranet lift, significant ROI was also realized shortly after launch. From an IT perspective, the new intranet allowed for the decommissioning of 20 stressed servers and reduced significant cost and complexity of Oracle operational support, including reduced infrastructure risk and outdated OS and DB web applications.

The launch of Pulse also allowed for single sign-on capability and previously unavailable external access to more than 130 specific Anthem apps, which users can now manage and access simply and securely. Pulse also proved to be an immediate win in terms of associate engagement, which rose by more than 250% for Pulse content. Also, the Pulse team was able to expire more than 120,000 pieces of outdated WorkNet content.

Overall, the team has been extremely happy with the performance and new abilities that Pulse provides.

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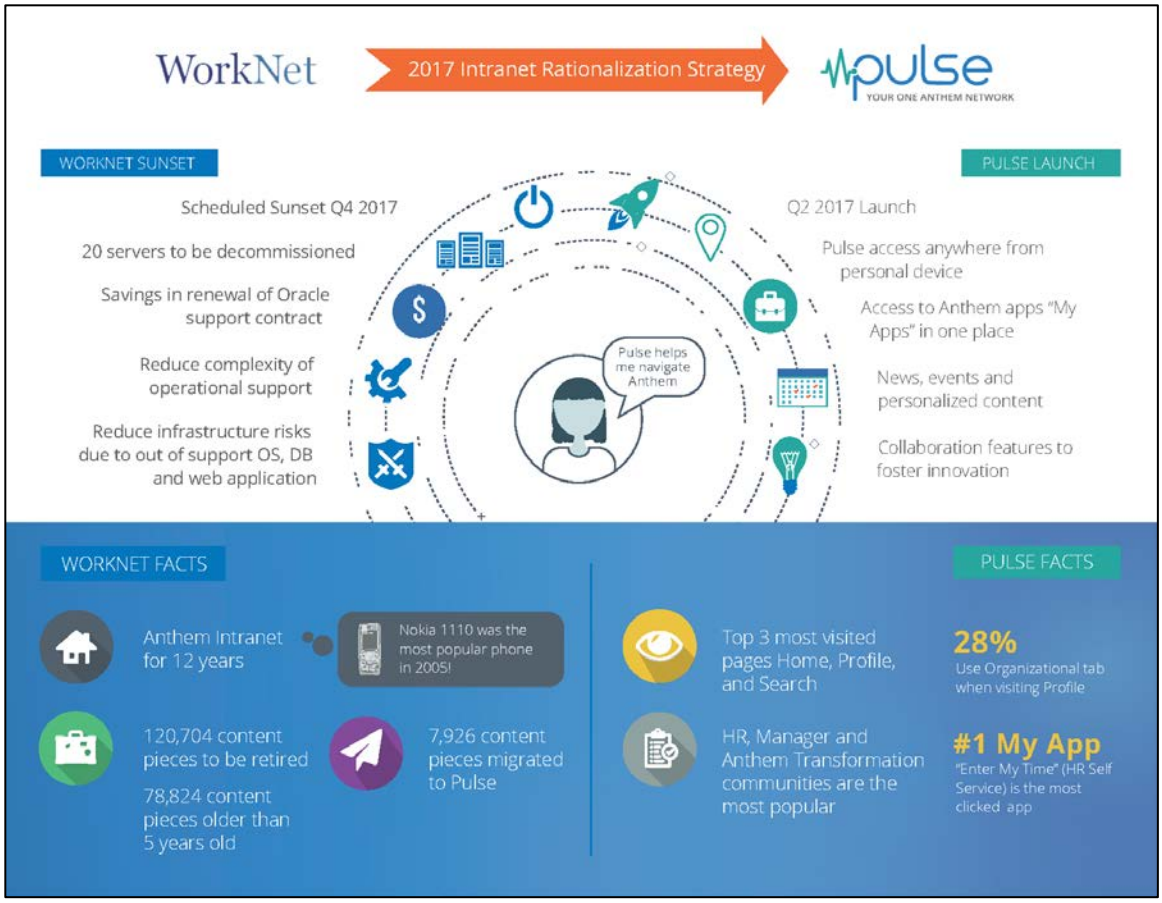


Image 63. Anthem Intranet Worknet vs. Pulse. This infographic illustrates some of the key differences between Anthem's previous intranet, WorkNet, and its current Pulse platform. *63_Anthem_34_WorkNetvsPulse_infographic.png*

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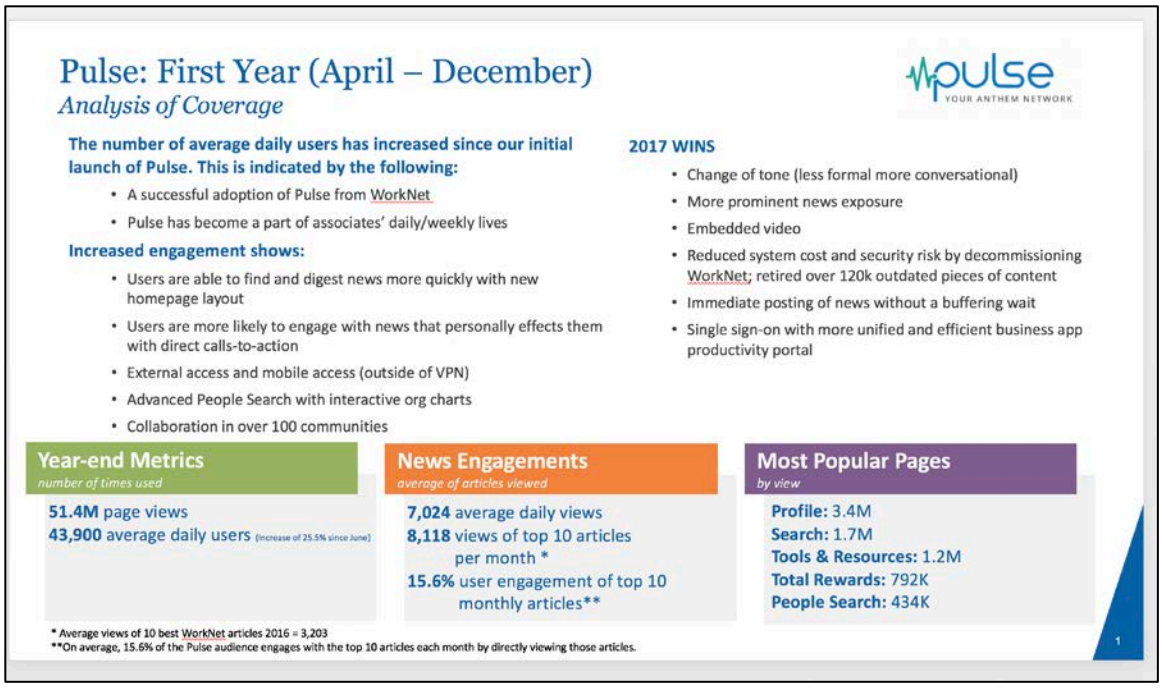


Image 64. Anthem Intranet First Year Stats. This graphic shows the 2017 year-end key metrics for the new Pulse intranet.
64_Anthem_35_pulsefirstyearstats.png

LESSONS LEARNED

The Anthem team learned many lessons during the Pulse project, and it shares two key lessons here:

- **Launch slow, but fail quickly.** "If you have the time, use it. Launch slow, but fail quickly. Don't feel rushed to move on to the next thing. Respect your timeline, but also demand perfection, if not close to it. If something isn't right, fix it. Always act with your end users in mind and don't be clouded by your own curse of knowledge. Just because you know how something works and realize what value it adds doesn't mean the end user will. Additionally, make sure that your team is made up of diverse individuals who really care about the product and realize the impact it can have. Give everyone a voice. From end users to project testers to those on your development and design teams, everyone has great value to add. Simply allow them to add that value with their voice, perspective, and opinion."

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- **Pay close attention to change management efforts.** “Change management is especially important if an organization has a lot of diverse users. Ease your audience and users into the adoption and do not just drop the new system on them. The Pulse team found that seeing is believing, so don’t be afraid to give glimpses into the current state and vision for the final product. Lastly, once live, don’t leave users on their own. Continue to support them and make sure that they feel a sense of ownership and ask them for their input. Make sure they know you value their input, but the team can’t do everything.”

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BHP Billiton Limited (BHP)

OVERVIEW

COMPANY

BHP is a leading global resources company.

Headquarters: Melbourne, Australia

Locations where the intranet is used: Employees at all BHP locations use the intranet.

Company locations: BHP has operations and office locations in more than 90 locations across the globe, primarily in Australia and the Americas.

Annual revenue: $43.6 Billion USD (FY2018)

THE INTRANET

Users: The Digital Workspace connects people to the tools, people, and information they need to do their work and stay informed about BHP. Approximately 62,000 BHP staff use the Digital Workspace to access the global and local tools they need to do their job, with tasks ranging from entering annual leave requests to launching SAP transactions.

Mobile approach: Responsive web design, with a mobile app currently in development

Technology platform: SharePoint Online

TEAM

Digital Workspace project team: Consists of 38 people, including a project manager, a solution architect, a team of developers and testers, two dedicated business analysts, a UX developer, and a UX designer. A single content lead manages page updates and content creation, and curates all company news. A broader publishing team of approximately 20 communications professionals leads content creation for specific parts of the business. A team also supports the ongoing product maintenance.

Current team members include:
Leadership: Angela Jackson, Digital Experience Platform Manager, Technology; Laura Clifton-Jones, Global Online & Social Media Specialist, Communications; Chris Luffman, Project Management; Ujjwal Dhingra, Development Lead; Siraj Shaik, Solution Architect; Mohan Sirur, Platform Lead.

Design (Creative Services): Alan Ong, UX Designer (Adelphi Digital); Christopher Cohen, UX Developer.

Business analysts: Carl Bergman, Business Analyst; Vineet Desai, Business Analyst; Joe Goodman, previous Business Analyst.

Development (InfoSys): Tripurari Tripathi, Developer; Amit Badge, Senior Developer; Navya Dibbidi, Performance Tester; Deevyanshu Yogi, Performance Tester; Manish Kumar, Developer; Ankit Middha, Developer; Namrata Lohani, Developer; Priya Dudeja, Developer; Munish Gumber, Developer; Vipul Sharma, Senior Developer; Jayshri Tayade, Developer; Sayalee Dandekar, Developer; Manasi Karnade, Tester; Rinkal Thadani, Developer; Vedashree Selukar, Developer; Lalita Desale, Developer; Raj Chauhan, Developer; Shobhit Agarwal, Developer; Ajinkya More, Functional Analyst; Hrushikesh Avhad, Functional Analyst; Selvin Rajendran, Developer; Amol Khalipe, Senior Developer; Sagar Purankar, Project Manager; Mihul Singh, Developer; Shreyas Prasad Urs, Senior Tester; Deepa Cheluvarjau, Test Manager.

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INTRANET TEAM



Current team members shown here (top row, left to right): Amit Bagde, Vineet Desai, Carl Bergman, Angela Jackson, Laura Clifton-Jones, Christopher Cohen, Alan Ong; (second row, left to right): Kirsten Aldrich, Tripurari Tripathi, Joe Goodman, Ujjwal Dhingra, Mohan Sirur, Siraj Shaik, Chris Luffman; (third row, left to right): Navya Dibbidi, Deevyanshu Yogi, Manish Kumar, Ankit Middha, Namrata Lohani, Priya Dudeja, Munish Gumber, Vipul Sharma; (bottom row, left to right): Jayshri Tayade, Sayalee Dandekar, Manasi Karnade, Rinkal Thadani, Vedashree Selukar, Lalita Desale, Raj Chauhan, Shobhit Agarwal, Ajinkya More, Hrushikesh Avhad, Selvin Rajendran, Amol Khalipe, Sagar Purankar, Mihul Singh, Shreyas Prasad Urs, Deepa Cheluvarjau.

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HIGHLIGHTS ABOUT THIS WINNER

Whether it's the many collaboration channels available or the multiple applications that inform user notifications, it can be difficult and time-consuming for employees to mine many different company apps to gather information. The BHP intranet does this work for them, gathering everything together in one place. Also, no matter where BHP employees are located, they can find, communicate with, and collaborate with their colleagues around the world. And multiple hearty search features give users the utmost control.

- **Catering to employees across time zones:** Many online collaboration tools and team capabilities make it easy for BHP employees to collaborate, regardless of their global location or time zone. A convenient clock feature facilitates scheduling meetings with people in other times zones, letting employees know at a glance whether their local time corresponds with working hours in six other important company locations that cover all of BHP's main operating time zones around the world. The BHP intranet also empowers employees around the world by offering news translated into local languages.
- **Applications:** The BHP intranet supports and links to a wide variety of applications to help users do their work. Several features, including the *App Finder* and *My Work,* make it possible for users to find the right app at the right time.
- **Communication:** The intranet delivers a ton of information through various types of media—news, leadership messages, notifications, wall feeds, trending, and publications—to keep employees in the know.
- **Search options:** A site search makes it possible for employees to find anything, and some sections—teams, documents, people, locations, and news—also have their own scoped search, offering faster, more accurate, and easier to deal with results. Sorting and filtering options empowers employees further. What's especially noteworthy about these searches is that they present a consistent front-end query UI and a similar SERP UI. This consistency helps employees become easily accustomed to the UIs and use them efficiently and effectively.
- **Favorites:** The ability to bookmark pages helps BHP employees easily access pages they deem important. Another interesting feature is that a user's favorites are noted in search results. So, when users search, the results show the number of favorited results within the search parameters and offers shortcuts to those results.
- **Employee profile:** Once you have read an employee's comprehensive profile document, you almost feel as if you know that person. Experience, skills, teams, and where they sit in the organization are only the beginning. Designers ensured that employee profiles are meticulously detailed.

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BACKGROUND

From Organization-Centric Portal to Digital Workspace

The previous BHP portal was built on SAP, and its functionality was extremely limited. People had no ability to share information, and the IA was inconsistent and often resulted in duplicate content. Navigation was based on organizational structure rather than focusing on people's needs, which encouraged the sprawl of microsites and, in so doing, disconnected the business. The intranet team didn't have any way of surfacing the tools people needed to do their jobs beyond providing lists of links. And no employees had user profiles outside of their SAP roles, so the only personalization available was in their favorites widget on the homepage. Further, there was limited development work to keep up with the changing needs of the business. As a result, the portal remained largely unchanged for many years, and it was difficult for authors to update their content. Employee needs had evolved, but the portal hadn't kept up.

BHP's new Digital Workspace now puts people first, focusing on what they need to do their jobs and feel connected to the company. Global information is available on the homepage or in navigation, and has been removed from region, asset, and function pages. The latter now present only specialized information and tools in an effort to move people away from the microsite behaviors that had become the norm on the old portal.

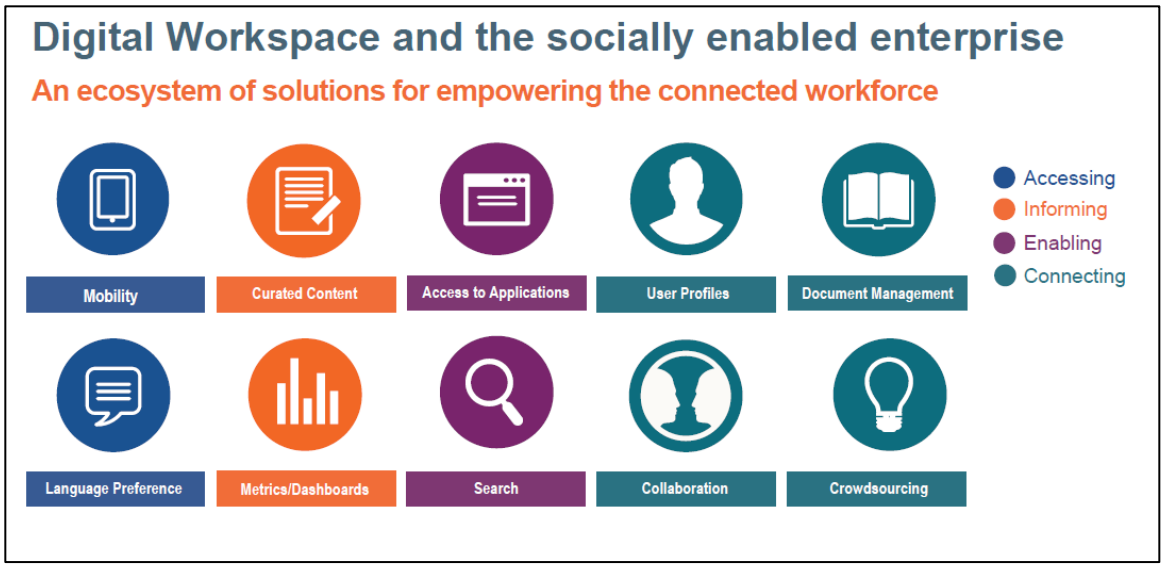
Designing with an Eye Toward the Future

The project team has taken an adaptive, or iterative, approach to design, refining the solution and enhancing and developing new functionality to a regular monthly drumbeat. This Agile way of working means that users can provide feedback and see that it has been heard and acted on within a reasonable time period. The intranet team also tracks people's behavior using an analytics platform; this gives the team data to continually improve design, inform decision-making for future developments, and measure the success of new functionality.

Goals

The overarching goal of the Digital Workspace is to connect people to the tools, people, and information they need to do their work and stay informed about BHP. The new platform provides them with accurate, timely, and trusted content that is personalized for their location and business area; it also gives them the tools they need to do their jobs via custom applications that serve up the relevant SAP transactions, reports, and applications needed for daily tasks. The platform is connected with an integrated search that returns documents, people, and news from around the company, including business critical documents stored in the records system.

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The BHP Digital Workspace solution is based on four pillars: accessing, informing, enabling, and connecting.

Challenges

The BHP team faced many of the challenges common to all intranet design teams, but the size and scope of its workforce introduced particular challenges, including:

- **The challenge of a global workforce:** BHP is lucky to have a business presence in countries around the world, but that level of global penetration introduces challenges associated with performance variations and demand for multilingual content. So, the team had to be mindful of how its design decisions would affect performance, particularly in some of the company's remote operating regions.
- **The challenge of intuitive design:** Perhaps one of the biggest challenges for BHP lay in having a large, globally dispersed, and time-poor user base. The design team knew it had to make the solution intuitive and easy to use with little or no training. It had to realize the individual needs of each business area and, at the same time, present a united front, ensuring that its workforce worked as one company. To achieve this, the team has been introducing more personalization features that let users make their own mark on the solution, while the solution presents a united front to the organization.

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Homepage

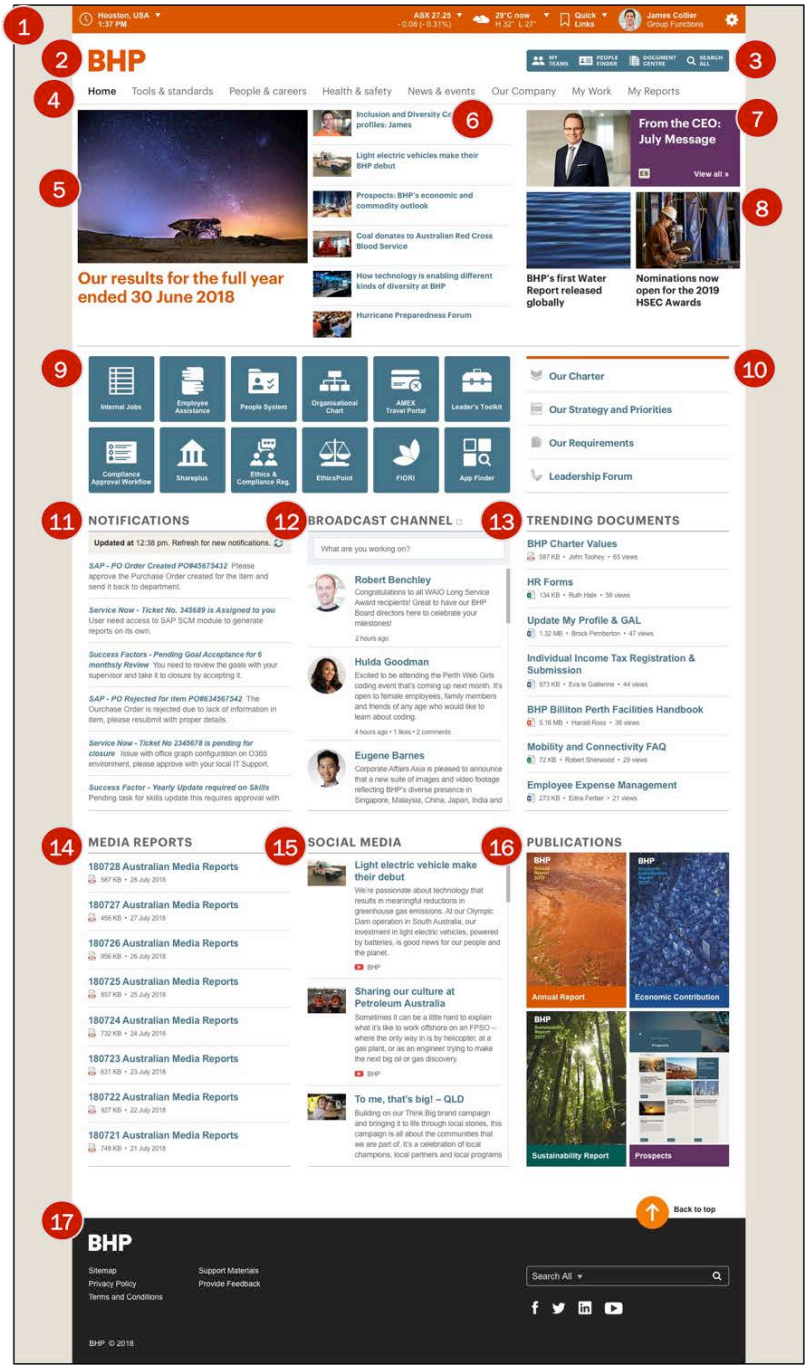


Image 65. BHP Intranet Homepage. News, apps, tools, a CEO message, and more comprise the helpful offerings on the BHP intranet homepage. *65_BHP_01_Homepage.jpg*

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Homepage, Highlights

Employees can access almost everything they need directly from the BHP homepage.

1. **Utility navigation:** An orange bar across the top of the page packs a lot of information into a small space. Because the bar is at the very top of the page, users can easily ignore it when they don't need the information it contains—and just as easily find it when they do. That information includes the user's main office name and time on the far left; and the company stock price and activity on the right, which helps employees stay abreast of how well the company is doing. The local weather also appears on the right, which is especially helpful for employees who do outdoor work. Next comes important links, followed by the logged-in user's photo and name. On the far right is a gear icon that leads to settings for customizing the intranet.
2. **Logo:** The orange BHP logo, made from its initials, reflects the company's humble beginnings as Broken Hill Proprietary in the 1850s. The logo anchors the top left corner of every intranet page and links users to the homepage.
3. **Tools:** Across from the logo on the right is a small toolbar with four labeled application icons for commonly used tools—*My Teams*, *People Finder*, *Document Center*, and *Search*—that deserve a prominent place on the page. The toolbar's teal background makes it stand out against the white page background.
4. **Global navigation:** The global navigation appears as grey links, with the selected link displaying in bold black text. The broad navigation menu includes six sections, plus the homepage. The topic names are distinctive and easy to choose between.
5. **Main news story:** A total of seven news stories appear on the homepage. An image related to the top news story appears on the top left side; below that image is a large bold orange title. The team wanted to signal the story's importance by placing it in the most prominent position and making it larger than any other item on the page.
6. **Top news stories:** Six more top new stories appear in a list to the right of the top story. When users log in, they can quickly get a sense of what they need to know about their company. They can personalize this newsfeed to display both *All Company* news and news from their business area.
7. **CEO's message:** Two cards for the CEO's message occupy a prominent position in the upper right of the homepage. An image of the CEO accompanies links in the purple box on the right; the links lead to the latest message and to previous CEO messages.
8. **Promoted content:** The cards below the CEO's message offer international promoted content and announcements about initiatives.

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9. **Applications:** Below the news is a wide section with oversized buttons that advertise important applications. The last of these is the *App Finder,* which helps employees locate additional applications that they might need to do their work.
10. **Company information:** To the right of the apps buttons is a list of company-related information, such as *Our Charter* and *Our Strategy and Priorities*. These links remind employees of the company's mission and values.
11. **Notifications:** The *Notifications* section displays alerts for the logged-in user. The time of the latest notification updates appears just below the section heading. The team integrated with back-end systems, including SAP, technology support, HR, and collaboration tools to pull user notifications. Consolidating these notifications in one place on the homepage means that users can spend less time navigating to apps and more time working on their to-do items.
12. **Social feed:** A *Broadcast Channel* section has a field that prompts users to write about their projects. This is a great way to enable employees to talk about work they are proud of or to request help from others. This feed adds to the liveliness of the homepage with short bursts of diverse types of information from many different employees.
13. **Popular documents:** The most popular documents are displayed in the *Trending Documents* section. Each document displays the document title, type, size, author, and number of views.
14. **Media:** The *Media Reports* section informs employees about press coverage related to BHP. This can help employees provide support to their communities and stakeholders.
15. **Social media:** BHP's social media posts appear in the *Social Media* section. The posts include a title, image or video thumbnail, and description to give employees an overview of the company's social media activity.
16. **Publications:** Important company publications, such as the BHP *Annual Report* and *Sustainability Report* appear in the *Publications* section.
17. **Footer:** The footer's black background on an otherwise white homepage signals the end of the page. The footer houses links to the *Sitemap* and *Privacy Policy*, along with links to support, site feedback, search, and social icons.

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My Work

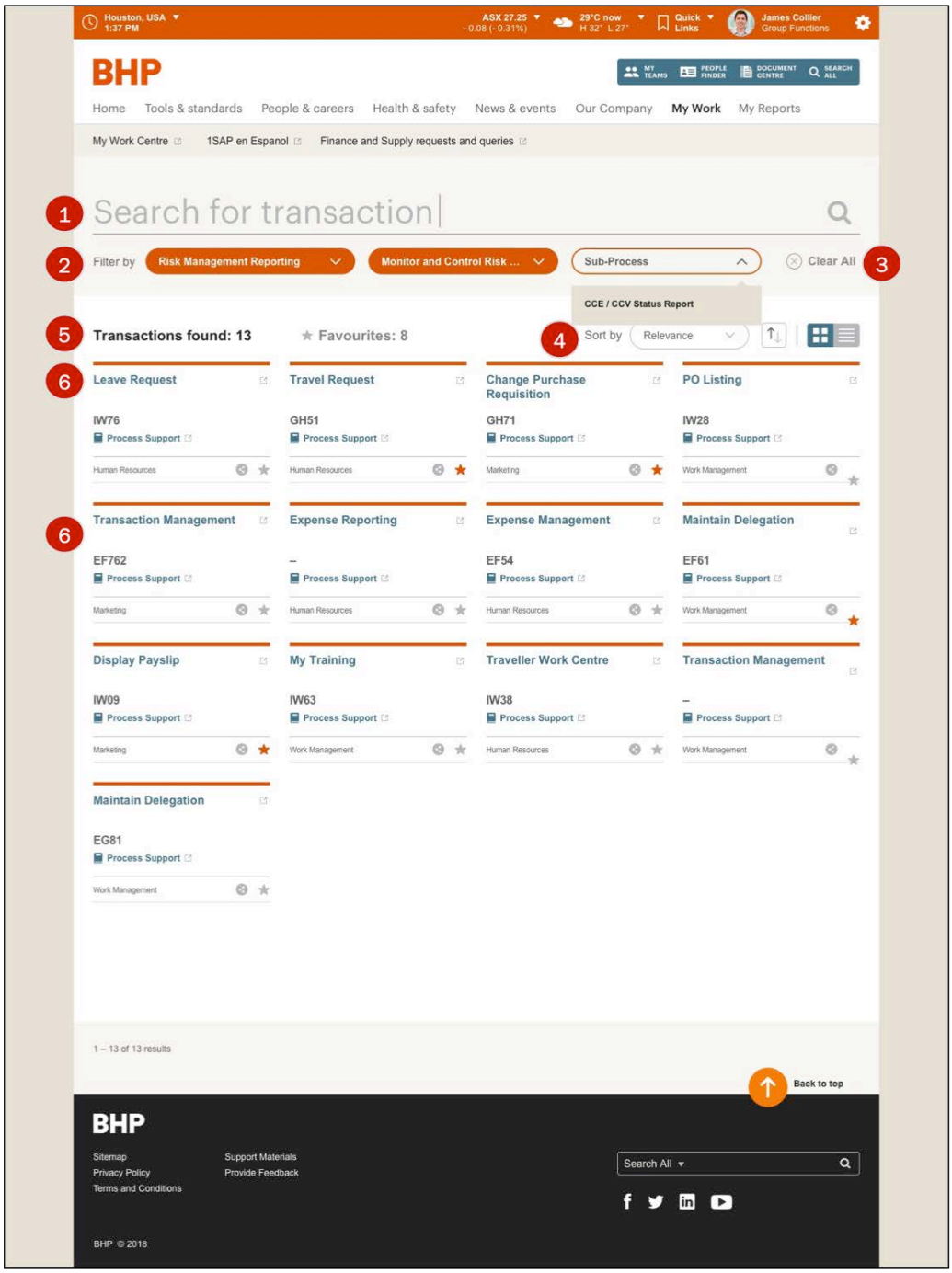


Image 66. BHP Intranet *My Work*. *My Work* is the place users go to locate the tools and information they need to do almost anything at the organization. *66_BHP_02_My_Work_DD3.jpg*

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My Work, Highlights

A wide assortment of apps and tasks are available through the BHP intranet. The *My Work* area lets employees quickly find and access whatever they need, ranging from making a travel request to placing material orders.

1. **Search:** Users can search for any kind of task using the *Search for transaction* field.
2. **Filters:** Filters make it easy to search the many possible transaction types. The *Filter by* section at the top offers buttons that, when clicked, drop open a menu of filters for users to choose from. The selected filters display within the buttons at the top, which helps users remember what they selected.
3. **Clearing filters:** It's easy to remove all filters and start fresh by simply clicking the *Clear all* link to the right of the filters.
4. **Sort:** The *Sort by* drop-down lets users display search results in a way that's most meaningful to them.
5. **Summary:** The *Transactions found* prompt indicates the number of search results and, to the right, the *Favourites* label shows the user's favorited transactions. Employees can favorite any of the transactions by clicking the associated grey star. Stars for the cards the user has already favorited appear in orange. These *Favorites* become the default view for employees, but users can also search or select *View All* if the transaction is not listed among their favorites.
6. **Transaction cards:** Each transaction in the search results is presented in a carefully arranged area with a bold orange line at the top and bottom. Leaving out the vertical lines that would form a box, as well as a background color, creates a pleasant minimalist look. The title of each transaction appears at the top of the card in bold blue text. Below it is the transaction code, a transaction reference guide, and work group category for the task.

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Clock

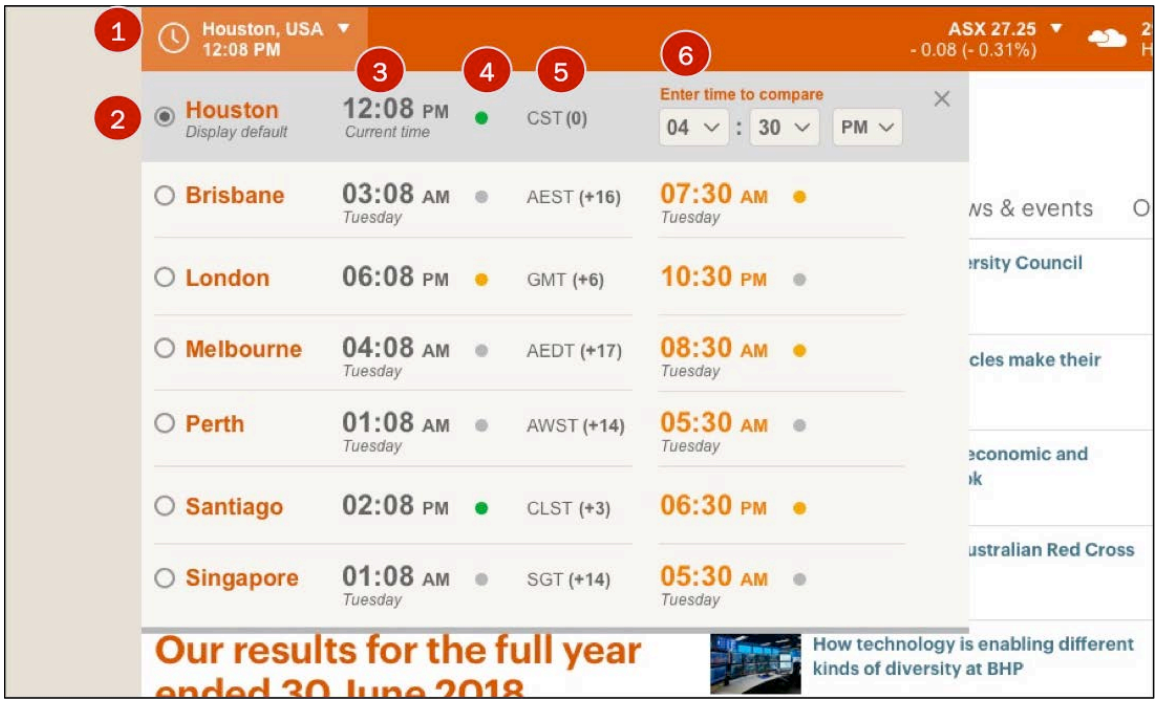


Image 67. BHP Intranet Clock. BHP employees use the intranet clock feature to see the working hours at the main BHP locations.
67_BHP_03_Homepage_ClockWidget.jpg

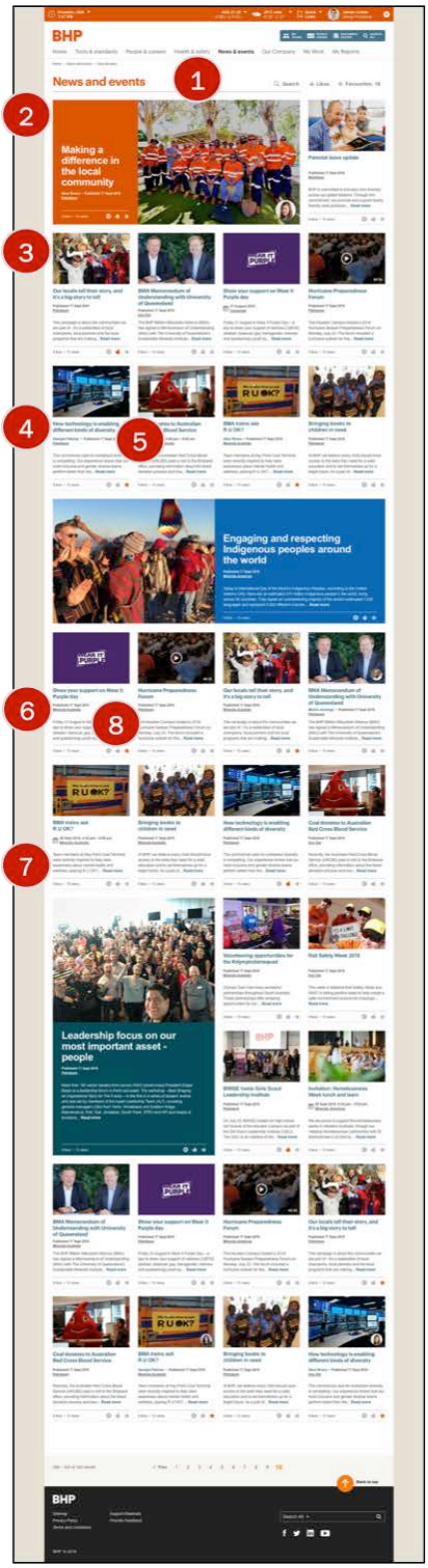
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Clock, Highlights

BHP has employees all around the world, so it's no surprise that the intranet clock is a very popular feature. The clock displays the main BHP locations with their working times so employees know whether a colleague in another location is likely to be available.

1. **Access:** Employees can see the clock feature, as well as six other time zones, by clicking the clock section on the upper left.
2. **Default:** To the left of each location name, a radio button lets users set that location as the default. This shows on the homepage and anchors the clock's comparison feature.
3. **Current time and day:** The current time of day, including AM and PM, is listed to the right of the location name. Because it appears in large dark grey letters, it is easy to scan and see it.
4. **Working hours icon:** During a location's common working hours, its indicator dot is green. During borderline hours—those that might be a bit early or late for some employees—the dot is orange. This lets employees know that they may or may not reach colleagues at that location. The grey dot represents non-working hours when users are unlikely to reach anyone at that location.
5. **Time zone:** The name of the office's time zone is listed in a column near the center of the clock applet.
6. **Compare times:** While the current times appear in grey, the option to compare times appears in orange. Drop-down choices at the top of the column let employees *Enter times to compare* to their default time zone. This is a handy feature when scheduling events with people in another time zone, and especially with multiple colleagues from multiple time zones. Employees can experiment by choosing different times and scanning the results for green (and orange) dots to find a common work time.

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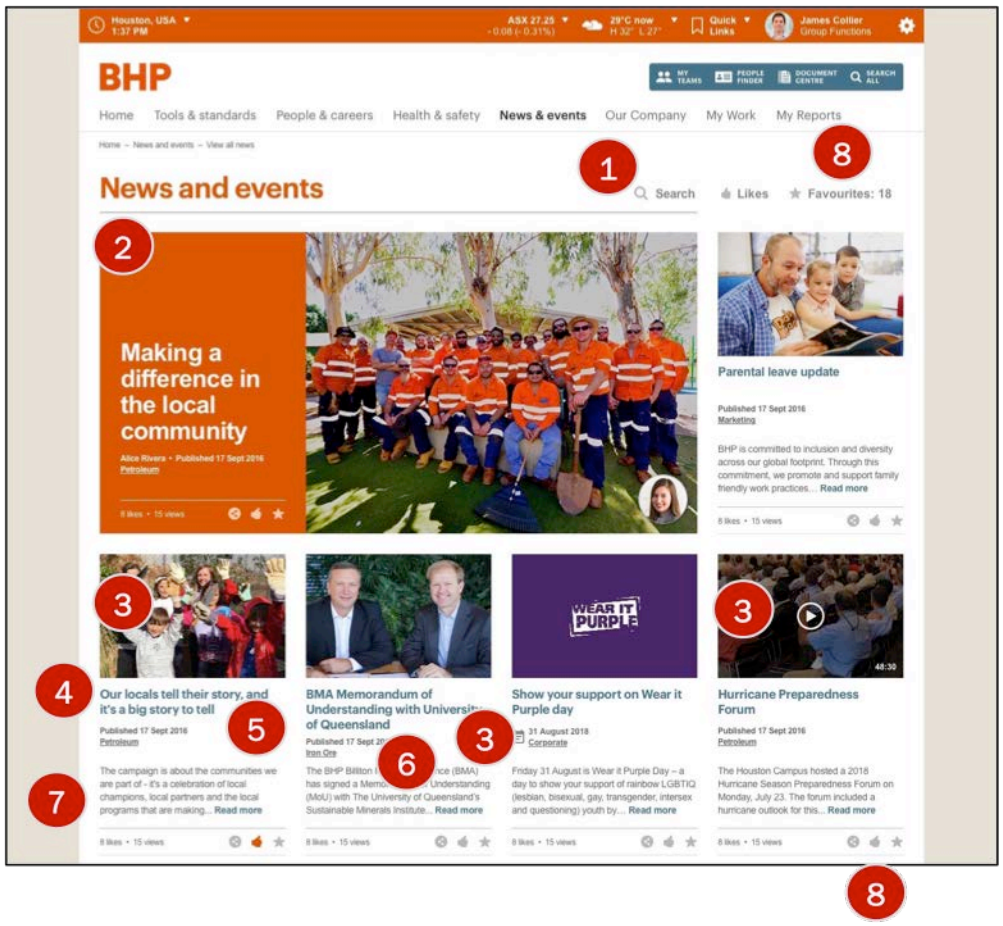


News & events (Full Page View)

Image 68. BHP Intranet News & events. As this and the following screen show, the *News & events* section gives a sense of how vibrant BHP is as an organization.
68_BHP_04_News_Listing.jpg

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News & events (Top of the Page)



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News and Events, Highlights

The BHP intranet's *News & events* section offers a sundry of news articles, videos, and event information. The items displayed target the user's business area or other ways in which the user has chosen to personalize news.

1. **Search news:** The *News & events* section has its own search feature as well as the global site search in the toolbar above it. Scoping a search feature to one intranet section can be awkward; however, given the vast amount of news on the BHP intranet, this is an entirely appropriate place to add this functionality. The search icon's position—parallel to the *News and events* page title—helps convey that it will search only news and events.
2. **Top news story:** Some items are given prominence because of their location toward the top of the page. Other articles are given prominence by displaying in a different size and color. For example, the top news story appears at the top of the page as a large orange card, with bold white text for the headline and a photo that takes up half the width of the page.
3. **Image:** Aside from the large items, most items are small cards with a related image at the top. The images give a sense of the story and engage employees. If the news is in video format, the play button icon appears in the center of the image, with the video length in the lower right. If the item is an event, a small calendar icon appears below the event name.
4. **Title:** The article or event title appears in bold blue letters, visually stronger than the normal text below.
5. **Date:** The publish date is shown in an international format with the month spelled out and the four-digit year.
6. **Audience:** The article's target is displayed below the date.
7. **Sample:** A few lines of the article give users an idea of whether they want to read further.
8. **Social:** The news card's bottom section shows the number of likes and views for the article. The small icons in the lower right let users participate, with share, like, and favorite options. In the upper right of the *News & events* section, the user can select links to see their own likes and favorites.

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News in Spanish

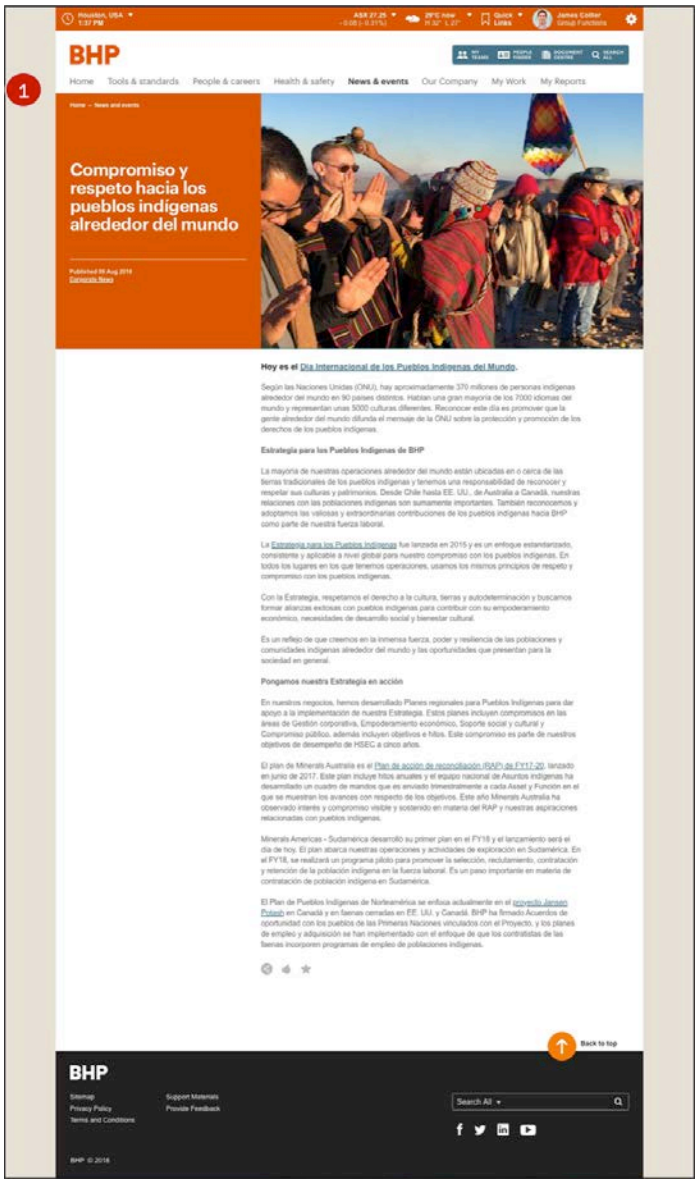


Image 69. BHP Intranet News in Spanish. Users in locations where Spanish is the most prevalent language are served their news in Spanish. *69_BHP_05_News_Spanish.jpg*

News in Spanish, Highlights

News is translated to the local languages used in the main BHP offices.

1. **Look:** The visual look of the page—image text, link, layout, column-width, and title—is the same regardless of language. The language served depends on the user's location.

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Find Teams

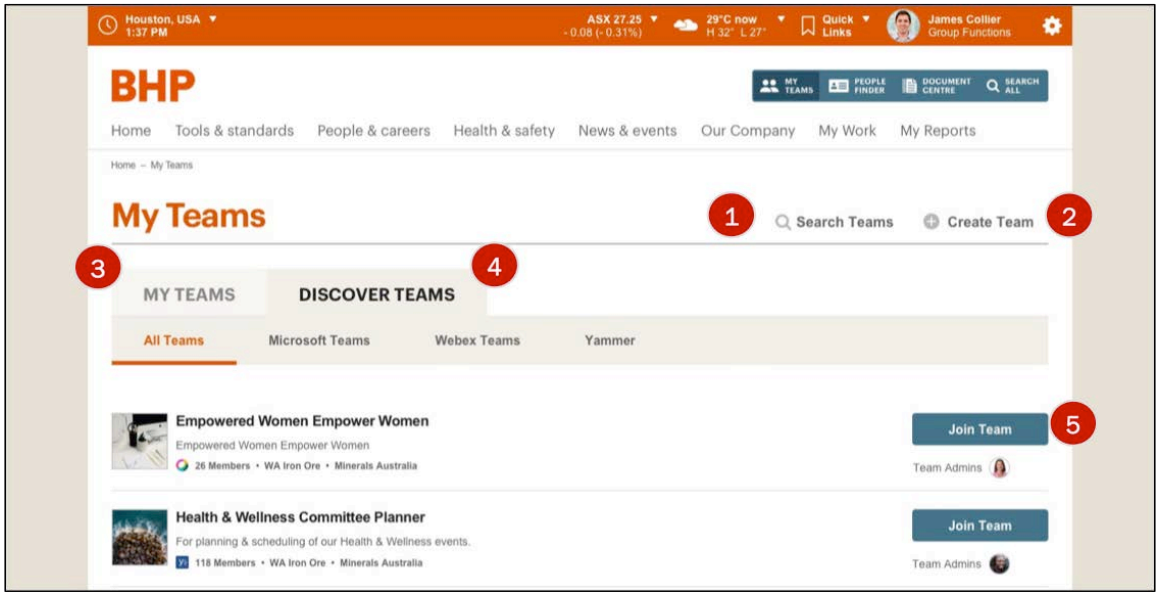


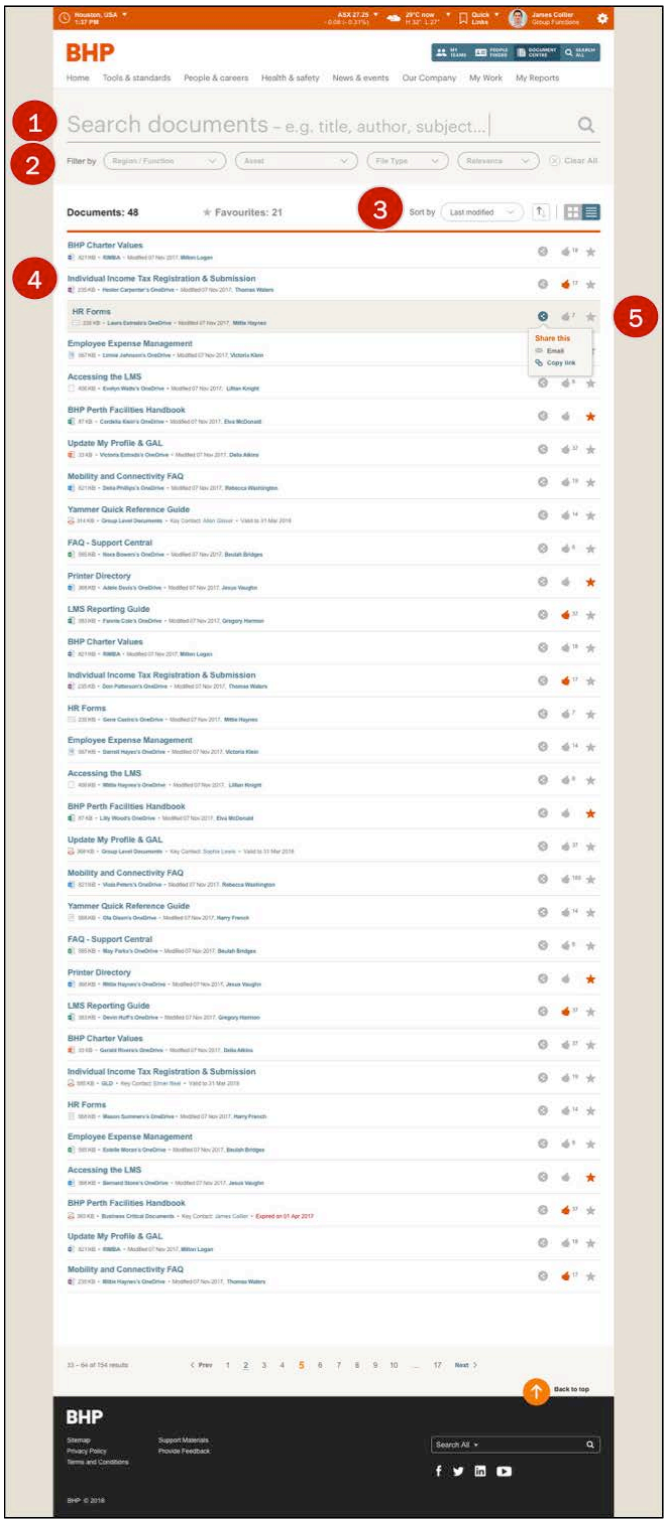
Image 70. BHP Intranet Find Teams. Team features on the intranet enable BHP employees to collaborate online. *70_BHP_06_Discover_Teams.PNG*

Find Teams, Highlights

Online collaboration capabilities are especially important for organizations with international employees who work in different time zones. On the BHP intranet, employees can create collaboration groups using various collaboration space capabilities and tools.

1. **Search teams:** If users are interested in a topic or know a team's name, they can use the search feature in the upper right to expedite their pursuit.
2. **Create a new team:** The *Create Team* link makes it possible for any employee to create a new group in which to collaborate with colleagues. This is a powerful feature that helps people communicate harmoniously.
3. **My teams:** Teams that the employee has joined appear in the *My Teams* section. Consolidating teams in one place is a helpful feature.
4. **Find teams:** The *Discover Teams* tab shows all teams. Users can also choose to sort them by the type of collaboration space, including *Microsoft Teams, WebEx Teams,* and *Yammer.* This is especially helpful when users know the space type but not the exact name.
5. **Join:** It couldn't be easier to join a team. Once users find a team they want, they simply click the inviting *Join Group* button.

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Document Search

Image 71. BHP Intranet Document Search. Users can search, sort, and filter more than a million indexed documents on the BHP intranet. *71_BHP_07_Document_Centre.jpg*

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Document Search, Highlights

The BHP intranet team has indexed more than a million documents; as a result, users can search and sort them to their heart's content. The SERP shows employees only documents to which they have access, which streamlines the SERP and makes data mining easier.

1. **Search:** Employees can search for any document by title, author, subject, or keywords, making this a commanding tool for finding the right documents.
2. **Filter:** Filters allow users to handle many results.
3. **Sort:** Various sort options—such as when the document was created or modified, and its popularity—help users see the results in the order they need.
4. **Name, type, and info:** Each result displays the document's name and an icon indicating its type (i.e., Word or PDF), along with its size, location, the date it was last modified, and the author. This metadata is what makes the search work so well, and helps employees determine if the document they find is the one they are looking for.
5. **Social:** Users can share, like, or favorite a result using the icons on the right side.

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Document Search Results

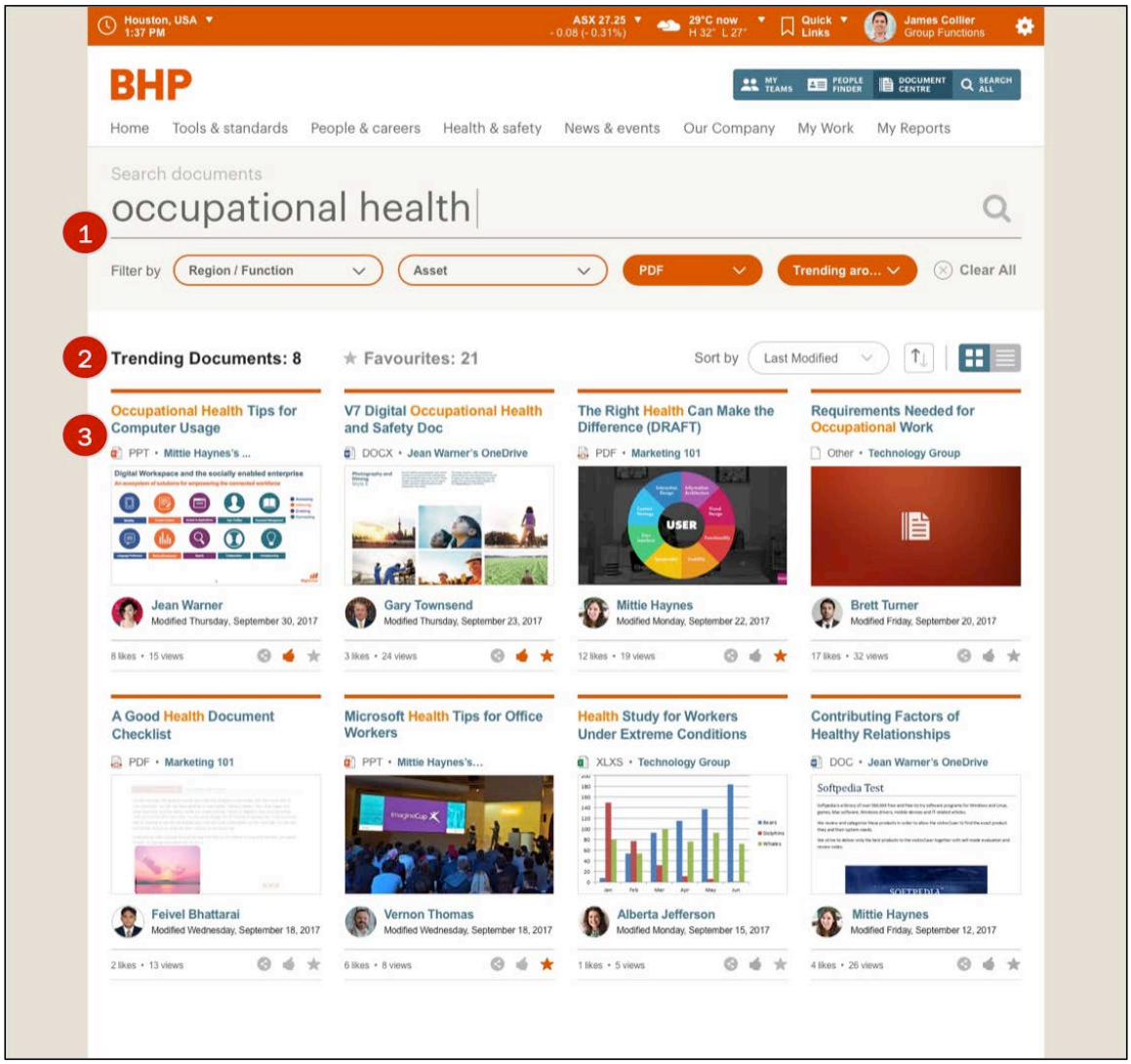


Image 72. BHP Intranet Document Search Results. Document search results include thumbnails for each document found. *72_BHP_08_Document_Centre_Search_Results.jpg*

Document Search Results, Highlights

Document thumbnail images aid users in finding the right source.

1. **Search and filters remain selected:** Once the SERP appears, the search term and any filters selected remain visible. This helps users recall what they searched for and selected, which also helps them refine the search if needed.
2. **Popular and favorites:** The number of *Documents* and *Favourites* appear at the top of the results. These numbers give users a sense of how much interest others have in these documents, as well as how much interest they personally have had in them previously.
3. **Result:** Each result contains the same information that appears in the documents list—attributes such as name, type, date, and author—plus a large thumbnail image of the document. This vibrant image makes it easy for users to recognize a familiar document, and gives them a small taste of what's to come in other documents.

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People Finder

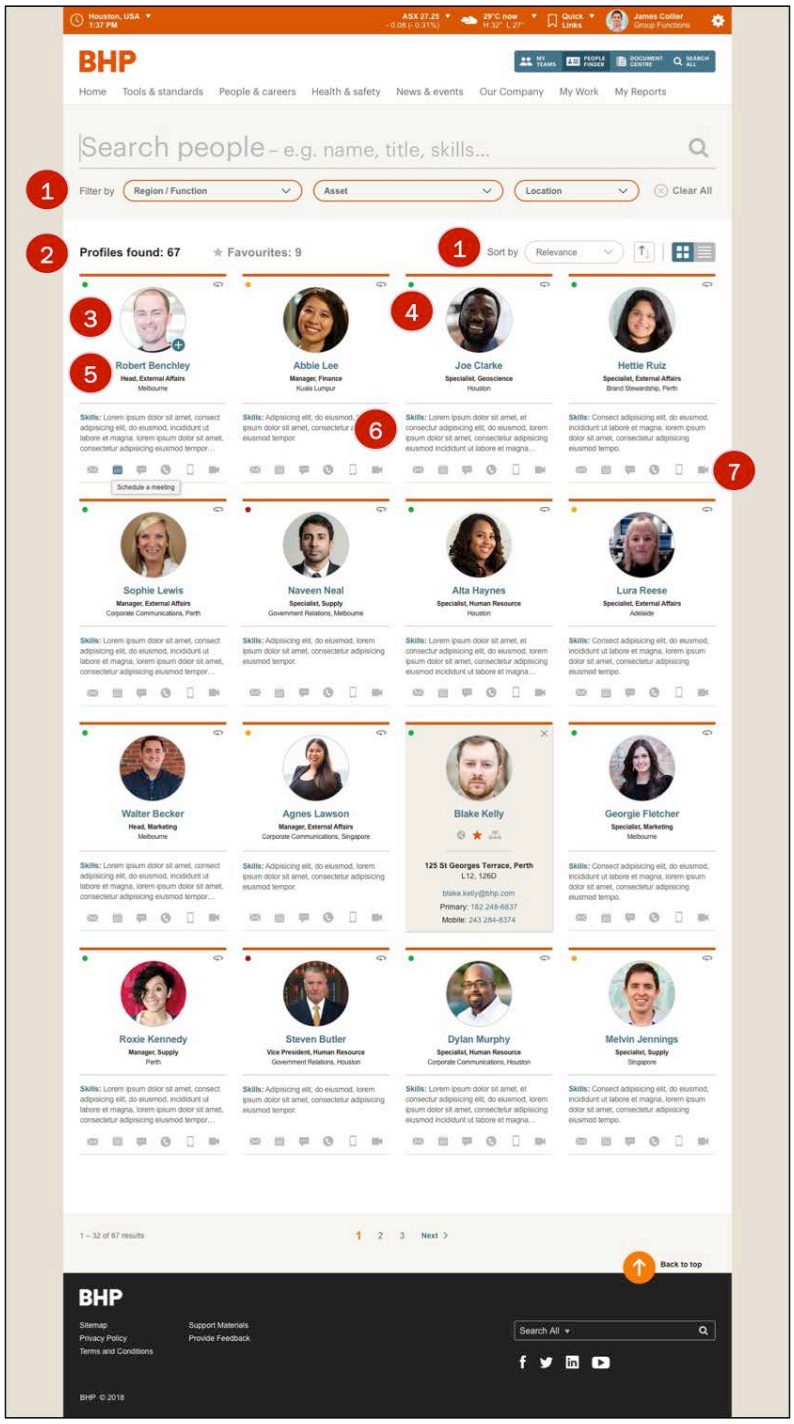


Image 73. BHP Intranet People Finder. People search results are presented in an innovative and fresh way on the BHP intranet.
73_BHP_09_People_Finder_Listing.jpg

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People Finder, Highlights

The people SERPs present just enough information about each employee to be useful yet not overwhelm. Considerable information is packed into each result, yet the results look elegant and uncluttered.

1. **Filter and sort:** Like the other searches on the BHP intranet, the people search offers filters and sorting capabilities.
2. **Results found:** The number of results and how many are favorites of the logged-in user appear at the top.
3. **Photo:** A photo makes the results more personal and helps employees recognize one another.
4. **Work time zone icon:** The familiar green, orange, and grey dot icons found in the clock feature appear in the upper left corner of each employee's card. These show whether the employee is likely to be working, possibly working, or not working.
5. **Name, title, and group:** The employee's name appears in large blue letters below the photo. The person's title and group appear below that in smaller bold black letters, followed by the office location.
6. **Skills:** Skills are differentiators for each employee, so the results showcase them. This makes it easy to find a coworker who knows how to do a target task.
7. **Contact:** Icons related to various ways to contact the employee—email, schedule a meeting, chat, landline call, mobile call, video call—appear at the bottom of each result.

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Employee Profile

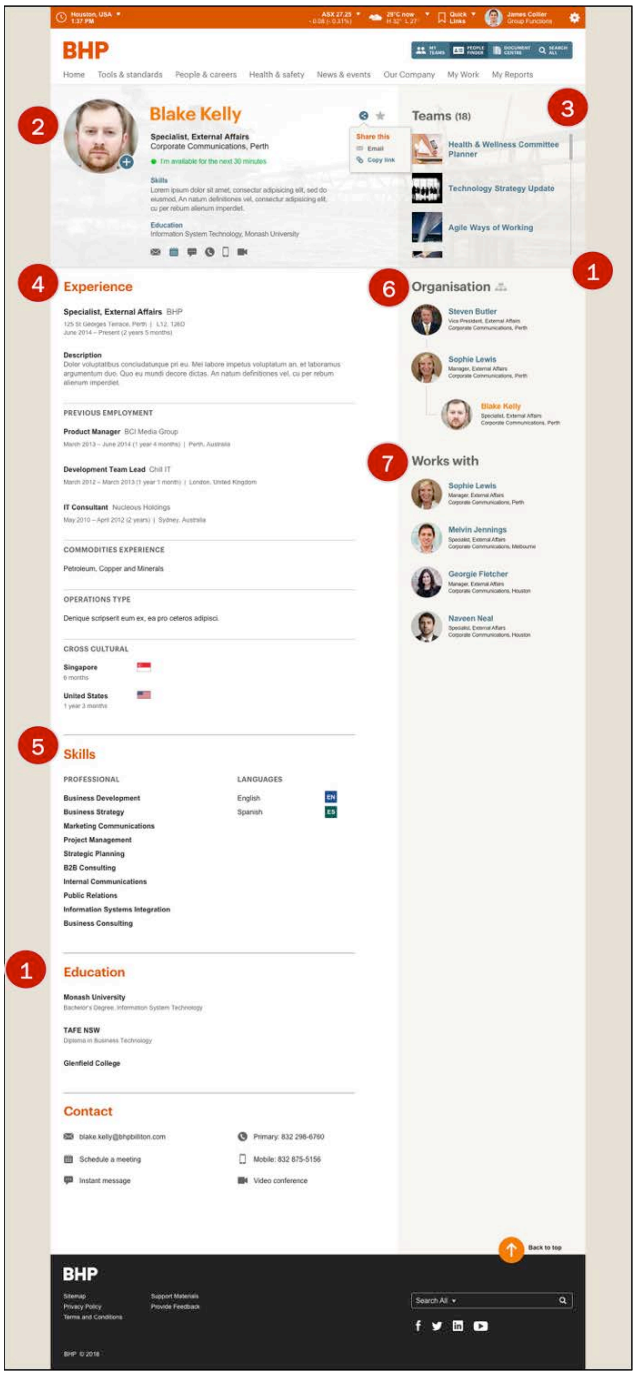


Image 74. BHP Intranet Employee Profile. Astoundingly thorough employee profile documents are a delightful way to begin getting to know colleagues. *74_BHP_10_Profile_Page.jpg*

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Employee Profile, Highlights

Employee profile documents on the BHP intranet go on for miles, in a good way.

1. **Sections:** Large subheading text and varied background colors make it easy to identify different profile sections.
2. **Main section:** The profile's top section includes the things one usually needs in an employee profile: name, photo, title, group, location, education, skills, and contact capabilities. But this section goes above and beyond that, including whether the user is available and for how long (based on time zone and work hours). This is a nifty way of making employees aware of one another's availability.
3. **Teams:** A list of the employee's teams appears in the upper right, which gives colleagues a sense of the person's interests, experience, and projects.
4. **Experience:** The intranet profile includes the employee's work history.
5. **Skills:** As with the *Experience* section, the *Skills* section also pulls data from the employee's LinkedIn profile.
6. **Organization:** An abbreviated subset of the org chart shows how the employee fits into the bigger picture, including whom the employee reports to, along with that person's name, photo, job title, and group.
7. **Colleagues:** People the employee *Works with* also appear in the right column.

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Locations

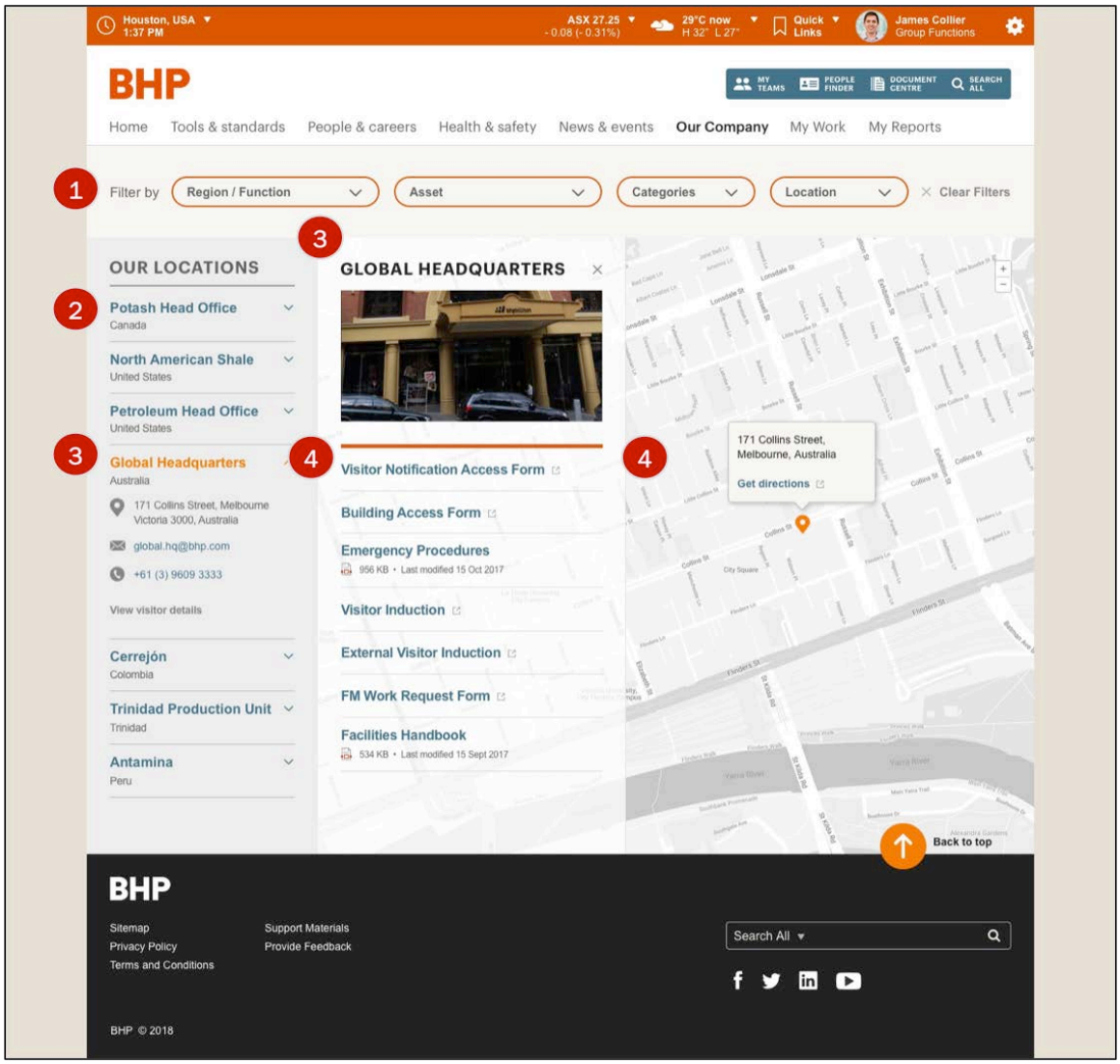


Image 75. BHP Intranet Locations. The Digital Workspace contains a comprehensive listing of BHP locations and is integrated with GIS information for visual display. Selecting a location displays detailed information for that location, including contact and address details, available services, directions, and relevant documentation and access procedures.
75_BHP_11_Our_Locations_Clicked.jpg

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Locations, Highlights

The intranet team worked closely with the Facilities team to provide detailed information on all BHP locations.

1. **Filters:** Employees can filter by different geographical areas, capabilities, and other criteria to find an office.
2. **Location collapsed:** Locations appear in a list on the left. The collapsed (default) information includes the location name and country.
3. **Location selected and expanded:** The selected location expands in the list to reveal the address, contact email address, and phone number. When expanded, the location's name turns gold, the caret icon turns from down to up (indicating that clicking it will collapse the item), and the page's main content area fills with more information about the location.
4. **Information:** Links to helpful information about the location, such as how visitors can prepare for a visit, appear beneath a photo of the front of the building. Also, a map shows the exact geographic location.

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Global Navigation

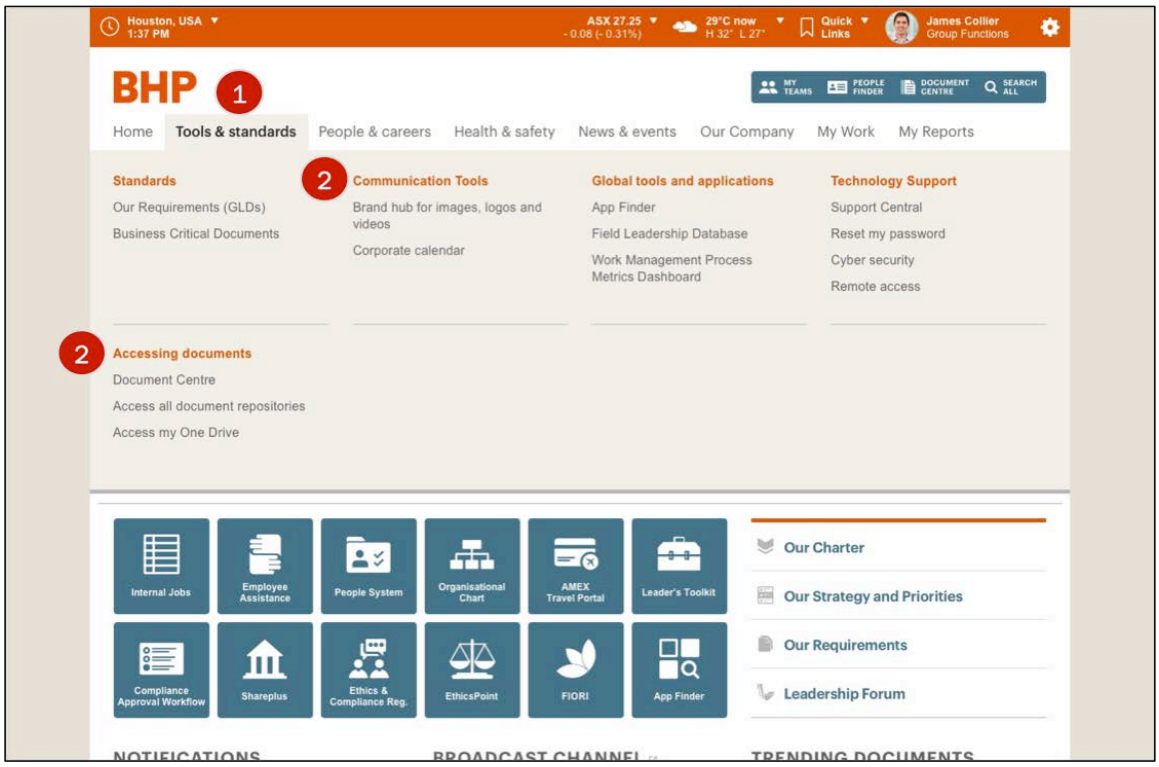


Image 76. BHP Intranet Global Navigation. The global navigation appears in a megamenu so that users can scan several links at once.
76_BHP_12_Homepage_Megamenu.jpg

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Global Navigation, Highlights

The megamenu design makes it easy to scan subtopics and links.

1. **Selected tab:** The visual treatment for the selected global navigation menu is a bold black label on a beige tab. This same beige color follows through as the background for all the submenus and links under that global navigation menu link. This visual continuity makes it easy to tell which menu is selected.
2. **Subheadings:** Subheadings describing sets of links appear in large bold orange text. These stand out, making it easy for employees to scan topics and decide if the links below might be of interest to them.

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DESIGN PROCESS AND USABILITY WORK

The BHP team used various research methods to design and build its Digital Workspace, including:

- **Wireframes:** The team used wireframes of the homepage, people finder, and collaboration space to give users an opportunity to review the designs, to create buy-in with senior stakeholders, and to help the team advocate for UX research and user testing.

  The team shared initial feedback from these sessions with a group of stakeholders from across the business to ensure that they understood the product's value and the implications for future support and integration. The feedback from these stakeholders was positive; so, after this initial review, the team began iterating the designs by running sprints and gathering feedback on working prototypes of the design.

- **Personas:** The team began work with a set of five personas: Executive, Office Worker, Mine/Field Worker—English, Mine/Field Worker—Spanish, and On-Site Worker. It then developed user stories based on the needs and daily work of these personas and the goals of using Digital Workspace to complete that work.

- **UX research:** Given the Digital Workspace's prominence, the team felt it was best to conduct usability testing with actual users so it could gather data on their needs and how the platform might best support them. The team also conducted one-on-one interviews in which a UX researcher discussed design features and walked users through the prototypes so they could better understand the designers' goals for the product.

User Testing

The project team held a series of usability test sessions with employees from all over the world who worked in many different job functions. These sessions consisted of one-on-one interviews intended to gather open feedback on the design (using a prototyping tool), as well as a task-based assessment in which users completed specific tasks. The latter use the Digital Workspace so the project team could map the processes, pathways, and roadblocks that users encountered when completing a task.

The team logged the gathered feedback in a usability report. Team members implemented some of the key feedback immediately; other feedback that aligned with the project's vision was entered into the backlog for future product development efforts.

Findings

Based on key user feedback from the one-on-one interviews, the team made the following observations:

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- Participants loved the quick links section and thought it would offer faster access to applications. They asked if it would be possible to personalize the links.
- Users viewed the notifications as important because they pertain to their everyday tasks. They also loved that their notifications were aggregated in one place so they didn't have to log in to various applications to see them. Participants said they wanted the notifications to be moved up higher on the page for faster access.
- Participants asked to see the time in key company locations so they could quickly determine the time zone for other offices.

The overarching reveal from these sessions was that users were coming to the intranet to get their work done, and they wanted the intranet to support that goal.

Each of the above observations resulted in immediate changes shortly after the Digital Workspace launched. These included changes to the clock widget and led to making notifications more prominent on the homepage, as well personalizing the quick links section.

The task-based assessments also provided further insights including the following:

- Digital Workspace's foundational pieces—such as the people finder and *Document Centre*—were not prominent enough in the design prototype. Basically, they were small underlined text links. Because they were not part of the main navigation, users often overlooked them. The team had to go back to design and make these links more prominent, while still having them compliment the main navigation.
- Users found that, in some places, different words were used for the same function, such as "find" and "search"; they also found the use of acronyms confusing. Based on these results, the team decided to avoid acronyms or at least ensure they were spelled out on first use. They also noted a need to ensure a more consistent use of terms across the site.
- As users were introduced to the prototypes, some were already thinking ahead about how they could get other software tools that their teams were using integrated into the Digital Workspace. These suggestions were logged for review for future development possibilities.

Users were eager to raise concerns about issues they noticed, given that the new platform would greatly impact the way they worked. They asked about mobile accessibility and access to documents, and noted the importance of intelligent search, as well as how critical communication and training would be during launch so that everyone could get off to a good start.

At the end of the sessions, users complimented the new design and said it was more intuitive, visually interesting, and much easier to read and navigate than the old portal. And they were excited for it to be launched as soon as possible.

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Adoption and Buy-In

The team focused on delivering a simple, intuitive design that was visually appealing and easy to learn. It was informed by analytics from the previous portal, consultation with a representative cross-section of the company's workforce, and user-tested before launch to lay the foundation for a successful launch.

The team kept employees abreast of what was going on and let them know that they could contribute to the intranet design through consultations before and after launch. Further, when employees gave feedback, the team listened and made changes in the subsequent releases in a timely manner. Team members also made a point to let employees know when changes occurred that were based on their feedback. All together, this made a huge difference in how people received the tool. People didn't have to expend much effort to locate and begin using the tools and information they rely on, and they saw that the team was committed to continuous improvement.

The team also took several steps to ensure that things went just as smoothly in the weeks that followed the launch as they did in the weeks leading up it. Those efforts included:

- **Keeping the old portal available.** To help mitigate any gaps it had failed to address or think of, the team launched both the new Digital Workspace (in the first tab) and the legacy portal (in a second tab) by default when people logged in. This default configuration existed for a few months while people made their way around the new intranet and got used to it.

  There was strong adoption of the new platform right from the beginning. And each week, more and more people were moving to it. Within a few months, team members felt that they could confidently turn off the legacy portal, and the feedback was overwhelmingly positive.

- **Providing training tools.** For several weeks, a pinned article welcomed people to the Digital Workspace and presented them with a suite of *Quick Reference Guides* and videos to help them find their way around. The team also made these training materials permanently available through links in the footer of every page. Users also had access to an email address where they could send questions, feedback, or suggestions. This is also permanently located in the footer.

- **Posting articles on key features.** In addition to the various training materials, the team created a series of articles that focused on a specific intranet feature or piece of functionality to help people make the most of the platform. These articles were distributed globally through the usual communications channels and served as an additional layer on top of the company's normal suite of tactics used to communicate any change in the business.

Change is always a challenge. Users fixate on little things. With the new BHP intranet, for example, they fixated on the blue tiles on the homepage instead of exploring the navigation more broadly. The team also encountered challenges when

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it updated content based on usage statistics; by sharing that analytics data, however, it helped give users the context they needed to understand the change. The game changer that helped folks fully transition was the introduction of WalkMe, a tool that pops up next to any element that had changed. The pop up displays a message explaining the reasoning behind the change and provides a link to support materials if users want to delve further.

Information Architecture

The previous portal navigation was designed around the organizational structure, which encouraged a sprawl of microsites filled primarily with duplicate information. Culturally, this IA didn't provide a united front for the company and there was no single source of truth; this introduced a lot of risk given the proliferation of out-of-date content. So, when it came to the IA for the new intranet, team members wanted to ensure they presented a single source of truth. No content would be replicated, and navigation had to be user-centric rather than follow an organization design. In a time-poor organization, navigation must be intuitive.

The new IA is designed so that all global information and tools are in navigation or on the homepage. These are not to be duplicated on "local" pages, which house only information that is completely unique to that region, asset, function, or center of excellence.

To determine how to approach the new IA, design team members looked carefully at analytics data from the previous portal and mapped out the most-clicked links and most in demand content. They gave the top-10 most-clicked on apps prime homepage placement and organized the rest under logical groupings: *Tools & Standards*, *People & Careers*, *News & Events*, and *Our Company*. *My Work* and *My Reports* offer two entry points to SAP transactions, which are vital in helping people do their jobs; given their importance, the team decided to keep their titles and current prominence. Team members reasoned that because employees had many other changes to adapt to, it was best not to interrupt these key daily tasks.

After the team completed a first draft of the new IA, it conducted a card-sorting exercise with a cross-section of employees to validate the design choices and make any necessary adjustments.

Going forward, the team continues to regularly report on navigation effectiveness using Webtrends so it can verify and make adjustments as it goes.

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WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Adelphi Digital	• Engaged to assist with extensive user research activities • Responsible for design and CSS packages
InfoSys	• Software development • Business analysis • Solution architecture

GOVERNANCE

Ownership

The Digital Workspace is a functionality-rich product, and as such, ownership is broken up across ownership areas where it most makes sense:

- **External Affairs** is the key decision maker for the homepage, menu structure, news, events, CMS, and business pages.
- **Technology** is responsible for applications (*My Work*, *My Apps*, *My Reports*, *My Teams*), *Document Centre*, the overall solution architecture, ongoing support, and maintenance.
- **HR** is the decision authority behind the people finder.

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INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Steering Committee	• Representatives from HR, Technology, and External Affairs meets periodically to help with executive decision-making and embedment
Executive Sponsor	• Provides oversight and strategic vision for the project • Serves as the point of escalation when the project needs help with budget and resource challenges
Project Manager	• Manages project deliverables and financials, and ensures that the project runs smoothly • Ensures that the project delivers the agreed business benefits according to the timeline
Product Owner	• Prioritizes user stories in the backlog • Works with the team to define product sprints • Acts as the voice of the customer
Corporate Communications Lead	• Governs the homepage design, navigation, and page content • Leads the news and content strategy • Governs and supports content editors
Content Editors	• Manages content for their respective region, asset, function, or center of excellence
OCM / Embedment (the change team)	• Ensures that organization impact is appropriately managed
ECM / Collaboration Architect	• Ensures that the solution complies with BHP architecture and standards

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URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
Default Status	Digital Workspace is set as every user's web browser homepage; it is also accessible through a tile located in the O365 waffle.
Remote Access	Employees are able to access Digital Workspace from any device at any time; to gain remote access, they must register for multifactor authentication.
Kiosks	Some field workers do not have accounts and must use kiosks to access corporate information on the intranet.

TIMELINE

PROJECT MILESTONES	
Item	**Status**
End of 2009	• Original release of SAP NetWeaver Portal
November 2016	• Requirements gathering and design commence
September 2017	• Release Gen 1 of Digital Workspace
March 2018	• Release Gen 2 of Digital Workspace
Ongoing	• Continual releases every six weeks

CONTENT AND CONTENT CONTRIBUTORS

Contributors

To understand the content authoring team, you need to understand the company's approach to categorizing news. Most of the content on Digital Workspace follows a categorization and/or tagging system that reflects the business and topics pertinent to company priorities. The categories follow the BHP organizational structure and help with various personalization features, including the local news carousels on the pages dedicated to each business area (defined as regions, assets, functions, or a center of excellence).

No one person on a content team is solely dedicated to the Digital Workspace. In many cases, publishing news on the platform is just a tiny portion of a contributor's

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overall job responsibilities. So, the following outlines roles for content development, but not how the team is structured in the organization:

- **Content lead:** sets the strategy for content pages, the homepage, and *All Company* news. This is in line with BHP's Global Communications Strategy.
- **Editor:** serves as the editor for a specific business area. Editors are charged with maintaining the standards, publishing pace, and news and content for their dedicated business page. A broader communications team supports this core group of about 20 people.
- **Content developer:** Many communications professionals at BHP have a role in developing content that can be published on the Digital Workspace. Another 20 people have authoring access to contribute and publish news for their dedicated topic or audience (business area).

CONTENT DEVELOPMENT AND OVERSIGHT	
Contribution	Given the popularity of the Digital Workspace, there is no shortage of people who want to contribute content. The intranet also complements several existing communications channels, so there was already a regular drumbeat it could fit into; for example, articles can now be published on the Digital Workspace first and linked to newsletters from there.
Training	The platform features a simple custom CMS, so training is not too onerous. Having a distributed publishing team means that most communicators on the team can publish a news article and someone who can help is never too far away. A training guide and one-on-one training helps with onboarding.
Management	The team has a central content planning calendar that the global communications team can contribute to; it also has a form to help people understand how to write for the Digital Workspace, what workflow they should follow, and what they need to submit to the publishing team.

Culling Content

The team's decision to move global links to the navigation and local links to the region, asset, function, or center of excellence meant that it could remove a lot of duplicate content from each page when migrating to the new system. The team also decided to migrate only the last three months' worth of news content. Archive functionality is built into the new CMS, which archives news stories by default after

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one year. Thus, a number of factors contributed to the team being able to achieve significant content reduction on the new platform.

Team members relied heavily on analytics to inform the decisions they made regarding content reduction. In places where clicks were low, they didn't include the old content on the new platform, taking a "wait and see" approach to see if anyone missed it, and then acting accordingly if so.

They also kept maintenance requirements front of mind when trying to decide what should stay and what should go. Because the company does not have a full-time, dedicated intranet content management team, maintaining the Digital Workspace is only a small portion of many content authors' responsibilities. The sophisticated integration of other systems, such as BHP's document repositories, means that portions of the intranet, such as business critical documents, can be maintained by the appropriate SMEs instead of the content team.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• SharePoint Online and SharePoint on-premise solution using provider-hosted applications
Bug Tracking / Quality Assurance	• JIRA supports Agile delivery, including sprint planning, user stories, prioritization, and bug/problem tracking
Design Tools	• InVision for high-fidelity mock-ups and to facilitate signoff and refine design
Content Management Tools	• Custom-built CMS
Digital Adoption	• WalkMe highlights each release's changes and assists with uptake
Analytics	• WebTrends tracks usage and offers input to prioritize backlog

MOBILE

BHP's ambition for a fully mobile-optimized solution was a high-minded goal, and it had to be tempered by practical considerations. Many people in the company's frontline workforce don't have company-owned devices, for example, and at some sites, safety standards prohibit mobile use during operations. So, while the design shown on these pages is responsive, the team is working to create a more complex mobile design that will recognize the unique requirements of BHP workers. This will take shape as a native mobile application that will be used as a robust app finder. The Digital Workspace has an app finder that lets employees access the applications required to complete their work. And, while the desktop app finder is a

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comprehensive list of applications, the team is not naïve enough to think that it is a complete set.

ROI

Gains That Cannot Be Measured

The Digital Workspace was never expected to deliver any direct financial cost savings; it has and will continue to deliver significant new functionality that cannot be benchmarked against current systems and utilization patterns. So, the key value realization was found in productivity benefits achieved by delivering incremental improvements to the digital experience and a collaboration toolset that has cultivated a connected and highly networked workforce. A connected workforce leads to improved productivity, promotes an outcome-focused culture, and fosters a borderless organization.

The team uses Web Analytics to prioritize the backlog and focus ongoing improvements.

To date, the Digital Workspace has completed two major releases, which included replacing the prior portal and providing the basics of a new collaboration environment. The team has also issued a series of minor releases to continually improve and refine the solution.

Feedback since the new platform's release has been overwhelmingly positive. People find the solution visibly fresh, easy to navigate, and intuitive. For example, one person wrote "Happiness is when you [used to] spend three days looking for a document, and try the new Digital Workspace and find it within three minutes."

So far, the functionalities that users appreciate most include powerful search, the ability to save favorites, and features that provide personalization and customization. Other benefits are starting to emerge as more people experience the Digital Workspace functionality and its potential to improve their way of working, sharing, and learning by giving them the ability to connect with others and locate key business documents and tools. This connectedness is enhanced by the platform's single sign-on functionality, which makes a world of difference for people who use multiple applications each day.

LESSONS LEARNED

The BHP team shares two key lessons learned through this project:

- **Find a product owner before you begin.** "Digital workplaces require strong business buy-in and product ownership. Advice to other teams looking to embark on the digital workplace journey would be: Confirm a product owner from within the business before commencing development."

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- **Change management efforts require help from above.** “Ensure strong management support to assist with the enormity of the change. One example of this was when the product was launched; the document center indexed an unprecedented number of documents. There were demands made to revise the scope of the document center, essentially limiting it to just Digital Workspace, however—with the support of senior management—the team was able to stick to the original plan of a full search and educate users on how to set permissions on individual OneDrive/SharePoint Online sites.”

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Duke Energy

OVERVIEW

COMPANY

Duke Energy is one of the largest electric power holding companies in the US, supplying and delivering electricity to approximately 7.6 million US customers in the Carolinas, the Midwest, and Florida. Its natural gas distribution services serve more than 1.6 million customers in Ohio, Kentucky, Tennessee, and the Carolinas. Its commercial business owns and operates diverse power-generation assets in North America, including a portfolio of renewable energy assets.

Headquarters: Charlotte, North Carolina, US

Locations where the intranet is used: Employees and contingent workers at all company locations use the intranet.

Company locations: Duke Energy operates regulated businesses in North Carolina, South Carolina, Ohio, Kentucky, Tennessee, Florida, and Indiana. It has nonregulated businesses throughout the US.

Annual revenue: Duke Energy's operating revenue is $23.6 billion.

THE INTRANET

Users: All of Duke Energy's employees and contingent workers—approximately 47,000 people—use the intranet.

Mobile approach: Responsive web design

Technology platform: SharePoint Online (O365)

TEAM

Design (Digital Media Team): James H. Bowen, UX Team Manager; Capricia Townes, Lead UI Designer; Doug McGuirt, UX Designer; Kiley LoCascio, Cardinal Solutions.

Development: Karissa Martindale, Cardinal Solutions; Sarah Doran, Cardinal Solutions; Bermon Painter, Cardinal Solutions; Brian Neese, Sr. IT Applications Analyst; Chris Greufe, Front-End Developer.

Content: Clark Kearns, Sr. Creative/Web Specialist; Stacey Krespan, Contract Web Specialist; Debbie Nobida-Jones, Communications Consultant; William Natta, Contract Web Specialist; Nyra Constant, Contract Web Specialist; Jerry Wells, Contract Web Specialist.

Leadership: Martha Brown, Product Owner; Deepa Shah, IT Solutions Delivery Manager; Maria Jennings, Scrum Master; Greg Wright, Contract Project Manager; Lauren Nguyen, Change Management Contractor; Michelle Pearson, Digital Media Team Manager & Business Sponsor; Michelle Littlejohn, IT Manager and IT Sponsor; Jeff Worboys, IT Manager.

Note: Some project team members worked part-time on the project: James Bowen, Manager (50%); Chris Greufe, Development Team (75%); Jerry Wells, Content Team (50%); Lauren Nguyen, Change Management (25%); Kiley LoCascio, Design Team (40%); Debbie Nobida-Jones, Content Team (40%); and Maria Jennings, Scrum Master (50%). Also, other managers (Michelle Pearson, Michelle Littlejohn, Deepa Shah, and Jeff Worboys) were not officially allocated to the project, but nonetheless spent approximately 20% of their time on it.

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INTRANET TEAM



Team members shown here (back row, left to right): Clark Kearns, James Bowen, Jerry Wells, Greg Wright; (second row, left to right): Chris Greufe, Lauren Nguyen, Debbie Nobida-Jones, Stacey Krespan, Karissa Martindale; (front row, left to right): Martha Brown, Will Natta, Capricia Townes, Sarah Doran.



Additional team members shown here (left to right): Nyra Constant, Kiley LoCascio, Doug McGuirt, Brian Neese, Bermon Painter.

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HIGHLIGHTS ABOUT THIS WINNER

This is the second Design Annual win for Duke Energy, which impressed us again with its innovation, organization, and communication, and its creative approach to exploiting information positively. So many features and so much content—which was painstakingly reviewed and edited for this redesign—make The Portal a wonderful tool for Duke employees.

- **Web parts:** The team's thorough review and analysis of all content on the legacy intranet revealed patterns of content types. Based on the defined content types, the team created 30 web parts, including: *Call to Action* (for links to applications), *Leadership Messages, Announcements, Contacts,* and the *Media Slideshow*. Each of these web parts was thoughtfully created, and they all embed smart defaults and encourage writers to make good decisions when they post content. These parts create opportunities for data sharing and help all designers stay true to the Duke Energy brand and remain consistent with other web channels at the organization.
- **Mobile:** While mobile is not yet a primary method used to reach The Portal, the team created a fully responsive site to meet the expected future mobile demands. Currently, many employees at generation and distribution facilities access The Portal via shared workstations. However, the company has begun issuing tablets and laptops to many of its non-office workers; if that trend continues, those workers will be increasingly likely to rely on mobile intranet access.
- **Brand:** A refreshed branding effort at Duke Energy inspired the intranet team to hop on board and create a consistent new look and feel for The Portal. For continuity's sake, *The Portal* name remains the same as the legacy intranet.
- **Relaunch:** To ensure that employees understood that a new, improved design was replacing the old, the team engaged employees in a wide variety of launch outreach activities to spread the word and build excitement around the relaunch.
- **Seeding content:** Leading up to the new site's launch, the Employee Communications team spent weeks recreating news stories in the new *News Article* template from the previous six months so that they would be searchable in the new intranet.
- **Personalized menus:** Only the links to intranet areas that users have access to are visible in the menu. This eliminates clutter and the possibility of alienating users who might click a link only to find that they don't have access to its content.
- **Visual hierarchy in megamenus and accordions:** Megamenus on desktop and accordions on mobile make it easy for users to scan and interact with links of interest. The visuals used in those menus—font, color, size, background, and spacing—all contribute to a menu structure that makes the hierarchy easily understandable.

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- **Technology:** Upgrading from an old version of SharePoint (and launching O365 at the same time) allowed the team to take advantage of the cloud and new features.
- **Search:** The team used SharePoint's out-of-box search features, including filters.
- **Visual design:** Subtle colors, shading, and flat elements with clear visual signifiers make the design a pleasure to behold and scan.
- **News publishing options:** When publishing news, editors are given various interesting options including turning commenting off and indicating whether a news story should be featured on the company's 425 physical digital signs, which are located in elevator lobbies and cafes in Duke Energy offices and facilities.
- **News:** Many news articles, shared internally and sometimes publicly, provide rich, engaging information about the company and its activities.
- **Guide:** The Portal guide acts as a combination UI style guide and pattern library, summarizing, describing, and recommending usage for the site's many web parts. The description pages also include images of the feature elements. The guide ensures that users will find, understand, and appropriately use the web parts. In the end, this creates a faster and better process for the design team and site managers; it also creates an improved and consistent design across The Portal, optimizing the UX for all employees.

BACKGROUND

Goals

Duke Energy had a portal that had been on a SharePoint 2007 platform since 2009, and Microsoft support for the platform was coming to an end. Given this, the team had a mandate to create a new portal, and to do so quickly. Too many new SharePoint versions had been released since 2007 to make a migration feasible, so the team felt that the best approach would be to recreate The Portal from scratch. This would provide an opportunity to think about the content in new ways and to streamline it for a mobile experience. The old portal pages were heavy with text and links, and over the years, content had become bloated and outdated, cluttering search results. It was time for a fresh start. Also, the company had launched a new external website in 2016, and through that work had established a new brand experience and design aesthetic for the company's digital properties; however, that aesthetic was not reflected in the legacy intranet. The team was eager to apply this work to the new portal and to offer Duke Energy employees a clean, modern, and mobile-friendly experience.

Challenges

The Duke Energy team overcame significant hurdles to get the new portal off the ground, including:

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- **Learning Agile.** For years, many of the team's members had worked together on projects, so roles and processes were well ingrained and established. The old ways—that is, a waterfall process of developing business requirements and detailed project plans, and then moving through a project's plan, design, build, and test phases—felt very natural, although inefficient and sometimes ill-suited for web work. While the team was eager to embrace Agile Scrum as a new, less encumbered way of working, there was much to learn.

  In the beginning, so much energy was spent learning Agile that the actual work got off to a sluggish start. The team struggled with the Agile core value that working software should be delivered at the end of every sprint, when there were as yet no designs to build and no development environments created.

  Eventually the team found its stride, and Agile brought out its creativity and resourcefulness in many unexpected ways. The Portal was built in layers, allowing all teams (content, design, and development) to work simultaneously, rather than wait for finished products and hand-offs. Continual iteration provided the opportunity to incorporate ongoing feedback, adjust to changing needs, and hone designs throughout the project. In the past, portal upgrades and redesigns took at least 18 months. With Agile, the team was able to do both in just 12 months. That said, the team continues to experiment with the best ways to approach design work in Agile, and whether that work should be managed within the core team or separately.

  Duke Energy is very committed to Agile, with a goal to transition all IT projects to Agile by 2020. An Agile Center of Excellence provides coaches and other resources to help make this transition successful. Further, having a widespread cultural shift to Agile has meant that teams are now empowered to work with autonomy, and that stakeholders and users have come to expect continual iteration. Some Agile teams are using Scaled Agile Framework (SAFe) to manage the complexities involved in supporting a common product.

  Since the launch, the team has switched from Scrum to Kanban, which seems better suited to support teams that may need to reprioritize work without interrupting sprint cycles. The team has moved from a two-week sprint cycle, with a Sprint Review ceremony at the end of each sprint, to a review conducted during the last week of each month.

- **Learning SharePoint Online.** The project was well underway before the team realized that it lacked expertise with SharePoint Online. Having worked in SharePoint for years with the old portal, the team thought: *How hard could it be?* Fortunately, Cardinal Solutions was able to step in and fill the gaps. Developing web parts using SharePoint Framework (SPFx) was a specialized skill set that went beyond a front-end developer's usual work. In addition, working in SharePoint Online involved many nuances, such as those related to creating a security-trimmed global navigation. Understanding these nuances required specific experience and expertise.

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Lots of changes in the internal digital landscape. Through coincidence—or perhaps really terrible karma—HR was moving to a new system for pay and benefits, with a drop-dead deadline of New Year's Eve. Originally, the team hoped to launch the new portal in September, in advance of the company's annual fall benefits enrollment window, but it became obvious that aligning both launches to the same date was the best choice. Doing so would minimize the change impact on employees, and it would mean the team wouldn't need to build out sites for HR that would become obsolete almost immediately.

Although this timeline change bought team members some much-needed time, it also gave them a nonnegotiable launch date and thus the stakes were high; because The Portal is the way employees access their pay and benefits (through single sign-on to hosted solutions), things had to go well.

With HR working through its own negotiations with the vendor on what content would move and how it would be organized on the vendor site, The Portal's scope was continually changing. The team originally planned to build the HR sites first, because they're such a high priority, but ended up moving them back in the schedule until it became clear what was needed.

In the end, it all came together and the date was met, with both teams in conference rooms and on calls celebrating the New Year together.

Further, The Portal's launch also coincided with the O365 rollout at Duke Energy. As with most projects, the timeline experienced some shifts. Because The Portal was dependent on two key tools—Delve for people search and web parts that featured employees, and Yammer for commenting on news stories—the team had to deal with uncertainty and delays in integrating these features. There were also ongoing questions about whether O365 tools would be available off the Duke Energy network. In the end, both Delve and Yammer are not allowed off the network, restricting user abilities to comment and to view employee profiles when on devices without network access. The O365 rollout also brought change management impacts, especially because it required that employees take a one-time action to create their O365 profiles. Without this profile, employees cannot access The Portal. So, while the profile was a necessity to access any tools in the O365 suite, because The Portal was the first tool to launch, the association complicated change management strategies and user perceptions of the new portal's ease of use.

- **Transitioning to the cloud:** *The Portal* is aptly named—serving as the entry point for a wide assortment of applications—but moving it to the cloud created some challenges because many of those applications remained on premises, including those in the Microsoft suite, such as Outlook and SharePoint.

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- **On-site search vs. cloud search.** One example of an unexpected impact of this reality was that the team originally planned to use search to surface content both in The Portal libraries and in on-premise SharePoint libraries, and even file shares, as an option (not the default). However, there wasn't time before launch to implement a solution that would bring back both cloud and on-premises content. This will probably be a future initiative for The Portal, although eventually most SharePoint sites will move to the cloud, so the conditions for enterprise search will change.
- **Licensing models.** Another impact of transitioning to the cloud has been that licensing models for cloud-based tools may be cost-prohibitive because vendors are still in the process of adapting to cloud-based business models. The team has been slow to implement a metrics tools for this reason, and this work is ongoing.
- **Load time.** Load time for The Portal has been an issue. When working the cloud, such issues require vendor support and—as is the case with all things new—everyone is learning. Early adopters always reveal unforeseen problems, and they also uncover insights that pave the way for new solutions and enhancements.

- **Mobile design in a "Bring Your Own Device" environment:** Creating a mobile-friendly design was not a challenge for the Duke Energy team as it is well versed in responsive design. However, persistent technical challenges make it difficult for employees to access The Portal on their phones—specifically, those phones that are enrolled in the company's Personal Mobile Device (PMD) program. The PMD program gives employees access to company email, contacts, and calendars; it also installs a secure browser, which is currently experiencing incompatibilities with Microsoft and defaults to The Portal homepage only intermittently. This challenge continues even today, and team members are working to resolve it. In the meantime, employees can access The Portal on mobile devices by entering its URL in a browser. O365 provides two-factor authentication, so employees receive a phone call to validate their identity. Until a better experience can be offered, the team has not listed The Portal in the internal PMD catalog for installation on personal mobile devices.

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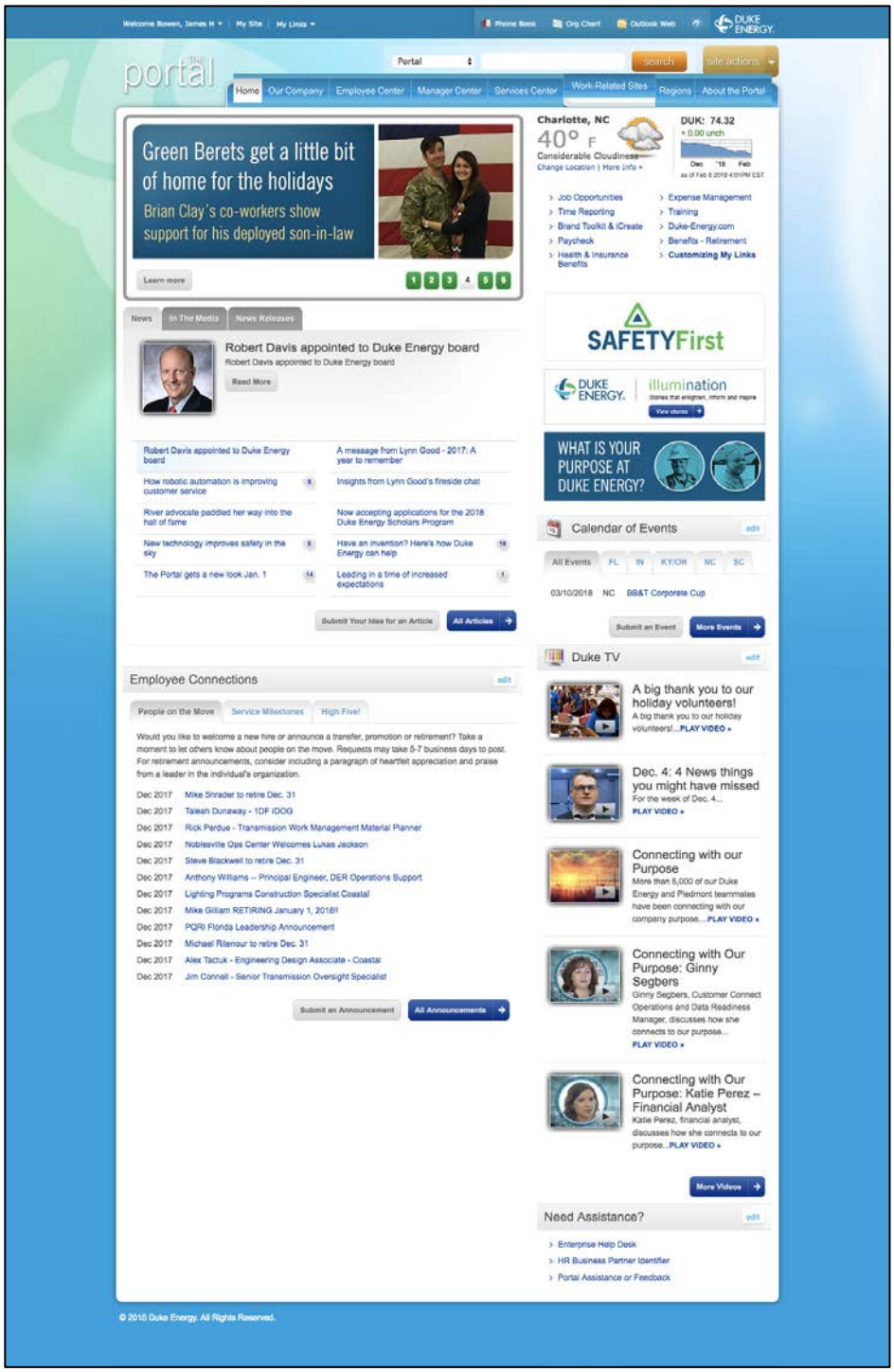


Image 77. Duke Energy Intranet Previous Homepage. This is Duke Energy's previous homepage, 2010–2017.
77_DukeEnergy_01_Old_Intranet_Homepage.png

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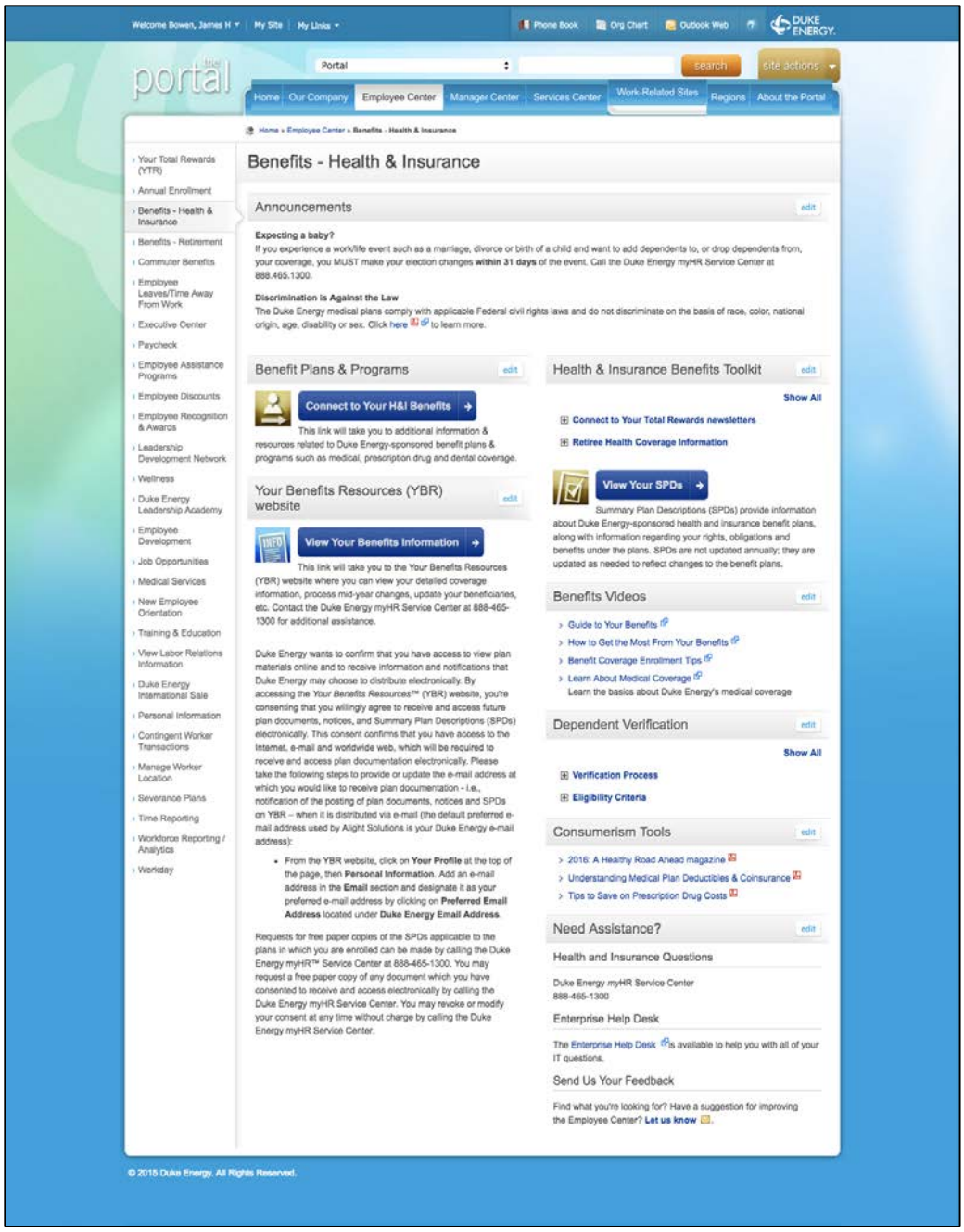


Image 78. Duke Energy Intranet Previous *Health & Insurance* Page. This *Health & Insurance* page from the previous portal shows some of the problems that the new design solved, including multiple buttons that competed for focus on the page and lots of text and links. *78_DukeEnergy_02_Old_Intranet_Health_and_Insurance_page.png*

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DESIGN REVIEW

Homepage (top)

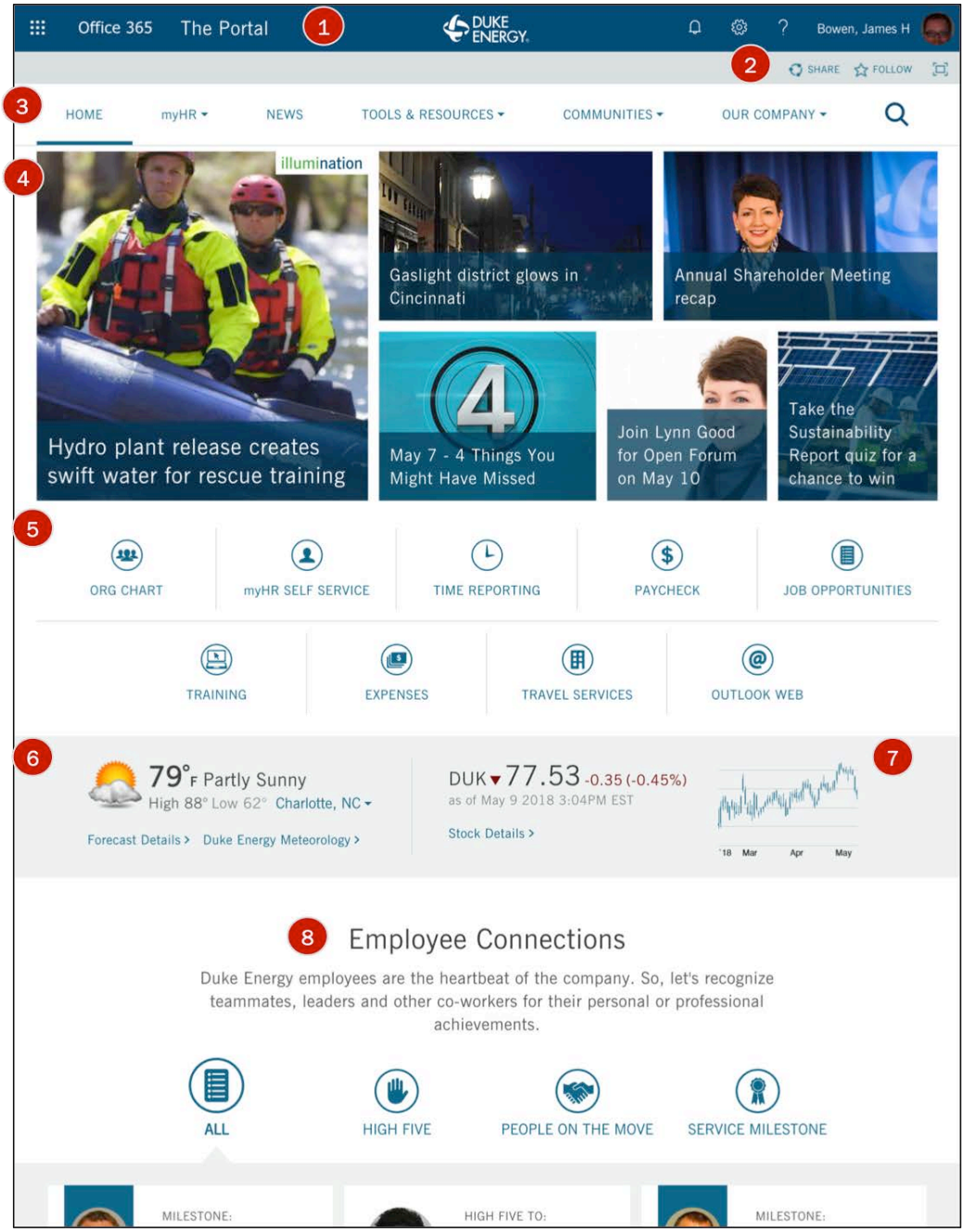
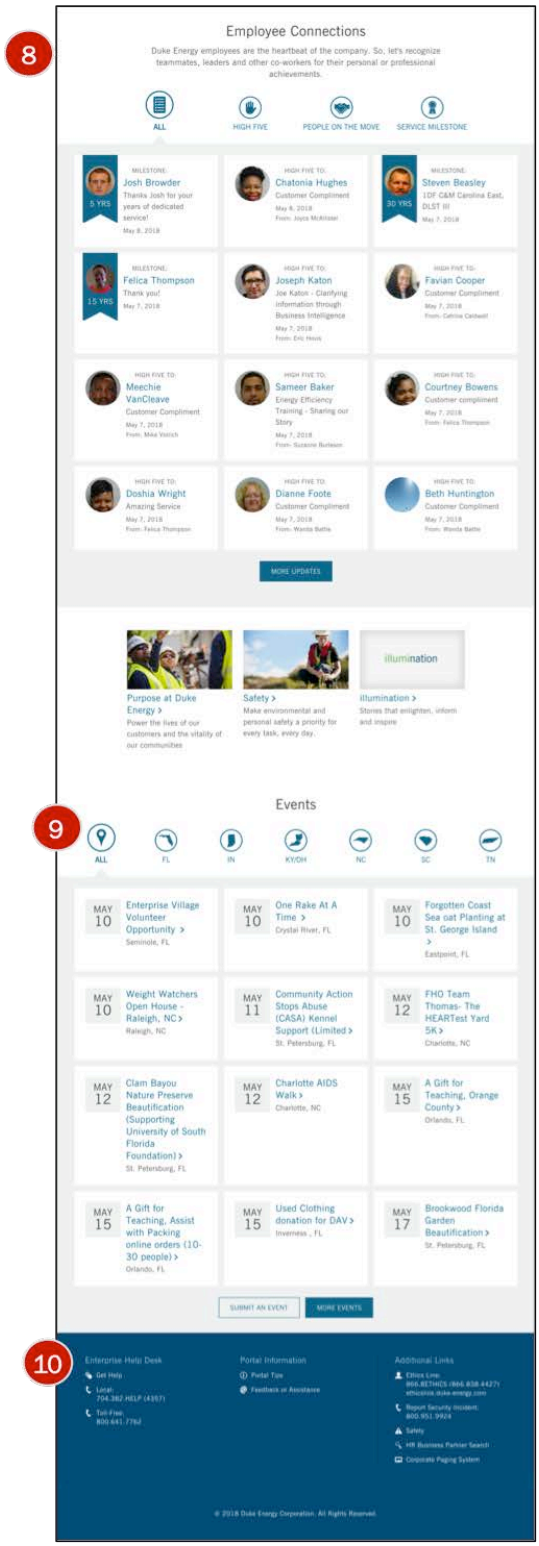


Image 79. Duke Energy Intranet Homepage. Duke Energy's intranet homepage (shown here and below) is easy to scan for news, tools, and other engaging content. *79_DukeEnergy_03_Home_Desktop.png*

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Homepage (continued)



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Homepage, Highlights

Packed with content, the well-planned visual design of the homepage informs users without overwhelming them.

1. **Logo, login, and links.** The homepage's topmost section, delineated with a dark blue background bar, includes the O365 App launcher (a nine-dot waffle menu); the logo and intranet name (*The Portal*), and the Duke Energy company name and logo, which is on brand. The right side of this topmost bar includes an alerts icon, which changes state when the user has alerts to view; a settings gear icon; a question mark icon for O365 help; and the logged-in user's name and photo. Each of these items is positioned in an expected location, and the bar is constant across all pages.
2. **Actions.** An action bar appears below the topmost bar, with a light grey horizontal background to distinguish it from the dark bar above and the white bar below. It includes commands and associated icons for *Share,* to share the page with colleagues (an out-of-the-box Microsoft feature); *Follow,* to follow the page and its updates; and a full-screen icon to show the content maximized, without the browser's chrome.
3. **Global navigation.** Even with three horizontal bars across the top of the page, the global navigation is visible and recognizable. The team took pains to tweak the visual design to ensure this visibility. The text is legible, and each menu link name describes homogeneous content. A search icon expands the site search field.
4. **News web part.** The topmost homepage content section displays the latest news items. These are gathered in a custom web part, called a *Mosaic,* which can display as many as six news stories or as few as one. This gives news editors the flexibility to promote several stories or just one important piece of news. To ensure that text is legible and looks pleasing, news titles resize based on the number of stories displayed. The titles appear in light text over a special banner overlay, so that the image details don't hinder the contrast between the text and background. Seemingly small visual touches such as this are just one of the things that make The Portal a winning design.
5. **Applications links.** Links to the most frequently used applications appear as icons just below the news *Mosaic*. Different applications show depending on the logged-in user's role.
6. **Weather.** Because weather is critical to daily operations in the energy industry, Duke Energy employs in-house meteorologists. Their forecasts are showcased center stage on the intranet homepage for all employees to see. The temperature, a short weather summary, and a related icon (such as a picture of a cloud) make it easy to scan the basics. The high and low temperatures for the day appear in smaller text, along with a link to the meteorology site (a separate website that features satellite imagery).

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7. **Stock price.** Keeping employees abreast of how well the company is doing in the stock market can be inspiring, especially for those who own company stock and options. To the right of the weather forecast is the stock symbol, current stock price, stock status (up or down), the date and time, a line chart of the stock performance for the last three months, and a link to more *Stock Details* for employees who want more analysis. This small patch of homepage real estate is packed with information; clearly, these designers know how to make use of space.
8. **Employee connections.** Duke Energy employees have long celebrated one another's tenure at the organization, as well as their promotions and other achievements. This is a special part of the corporate culture. The legacy intranet offered an *Employee Corner* to showcase this information; the new design improved on it in the form of the *Employee Connections* section of the homepage. This large section displays work anniversaries, promotions, and recognition for a job well done. Each item shows the employee's photo and name, the type of milestone, a description of it, and the date. For the *High Five* recognition awards, the name of the person who suggested the award is also listed. A work anniversary milestone is visually distinguished with a blue ribbon behind the employee's photo swatch and the number of years he or she has worked at Duke. *People on the Move* includes promotions and new jobs. All items in this section are submitted by employees, approved by the Employee Communications team, and then posted for display. The buttons for submitting items appear under the tabs to filter by *High Five*, *People on the Move*, and *Service Milestones*. These features are so popular that submissions are often backlogged for several days; the team allows such a backlog to give each submission time to be seen before it is retired to make room for the next.
9. **Events.** The company encourages employees to volunteer in their community and support company-related events, as well as to share the information about those events with one another. Employees can submit items to the events calendar via the *Submit an Event* button that appears below the table. They can filter the events by location using the state's abbreviation link and icon, which appears just above the calendar grid. Refining by location allows employees to find their local events easier.
10. **Footer.** At the bottom of all portal pages, the footer appears, distinguished by a blue background. The footer contains three sections: *Enterprise Help Desk*, with phone numbers for contacting the help desk; *Portal Information*, with links to tips about The Portal and links for giving feedback; and *Additional Links*, which includes phone numbers for the Ethics Line and security and a link to safety information.

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Home Mobile

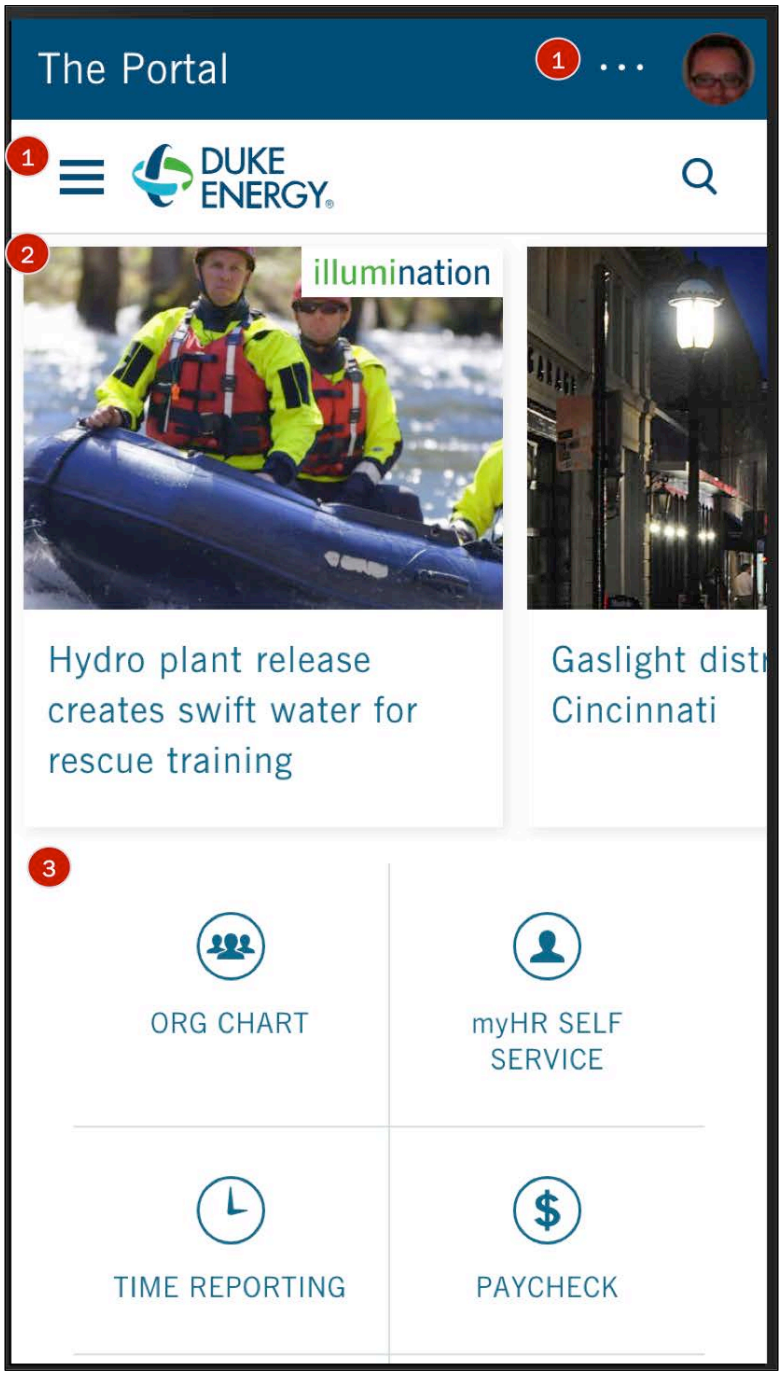


Image 80. Duke Energy Intranet Homepage, Mobile View. When accessed on phones, the site offers all the same capabilities optimized for mobile. *80_DukeEnergy_04_Home_Mobile.png*

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Home Mobile, Highlights

When the homepage is accessed on a phone, the news and applications flow to make the most of the screen real estate.

1. **Menus.** The site's top sections are collapsed on mobile. Alerts and settings are collapsed under an ellipse icon, while the global navigation is under a hamburger menu icon.
2. **News web part.** The same news items that appear on desktop also appear on mobile, but they are presented differently. The text is separated from the image, appearing just below it and removing the background color to make it legible on the small screen. The *Mosaic* web part makes all tiles equal in size on mobile. One news item uses about 33% of the screen real estate, while the next item is partially visible, bleeding off the screen and clearly signifying to users to swipe to see more.
3. **Responsive flow.** On mobile, the content is prioritized and most of the sections stack vertically instead of horizontally as on desktop. Items that are in tabbed sections on desktop appear as accordions on mobile. These design choices make the most of the screen real estate and create targets that are easy to tap.

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Menu

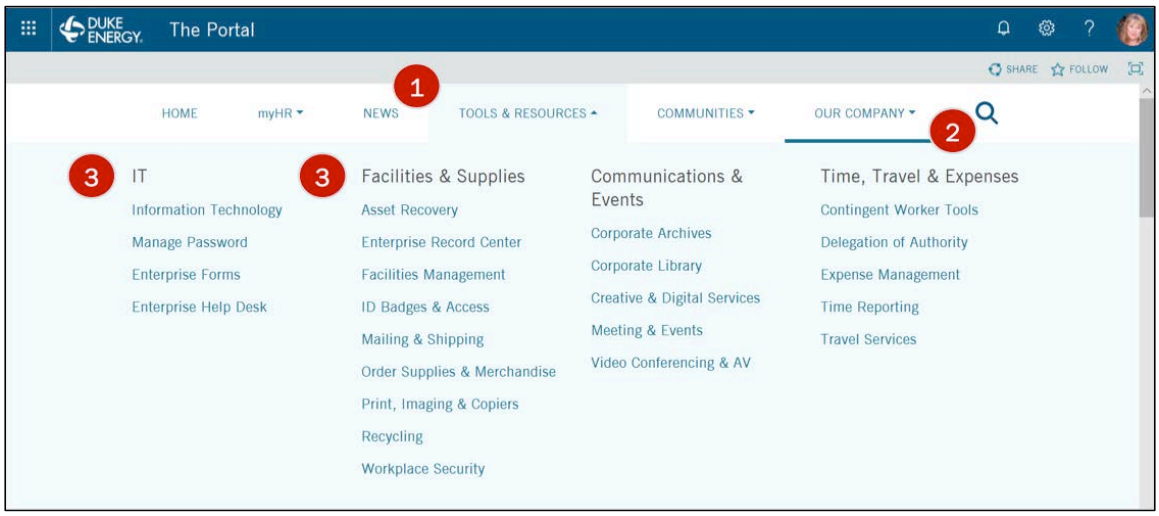


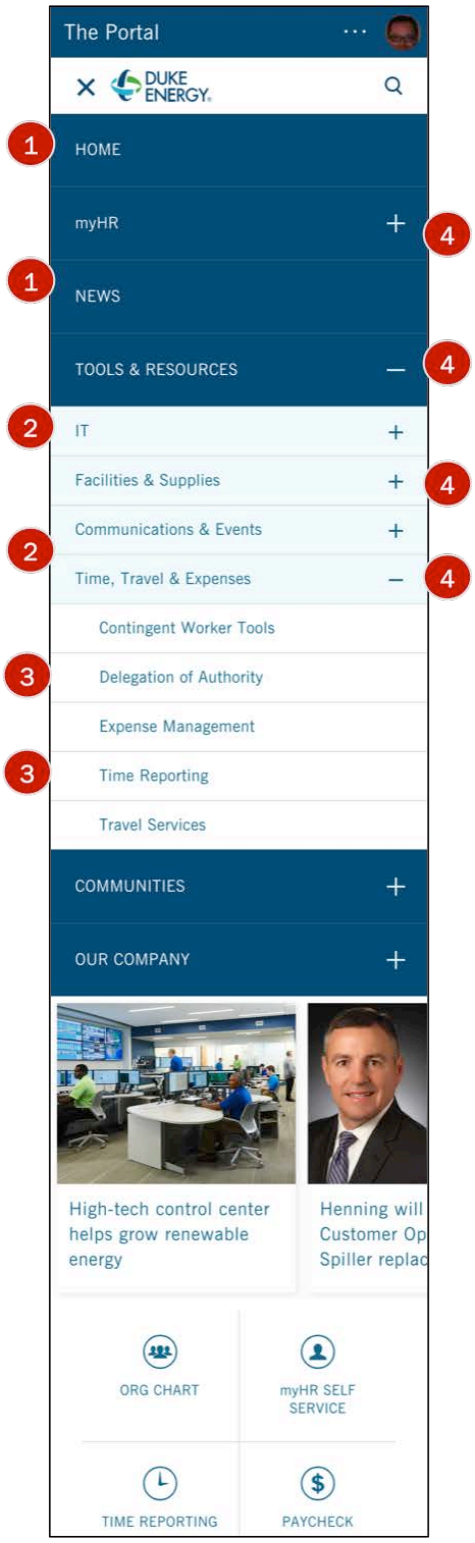
Image 81. Duke Energy Intranet Megamenu. The megamenu opens on click on desktop. *81_DukeEnergy_05_MegaMenu_Tools_Desktop.png*

Menu, Highlights

The megamenu lets users see many commands at once and scan to make the best choice.

1. **Click to select and open:** Once clicked, the selected menu appears with a subtle light grey background. The selected global navigation link—in this example, *Tools & Resources*—is denoted with a grey tab and the same grey background is carried down behind all the subcommands in that open megamenu.
2. **Highlight feedback:** As users move the cursor along the menu, a blue underline indicates the position; clicking opens the underlined menu.
3. **Subheadings:** Marks of a great megamenu are clear subheadings and good spacing. This megamenu distinguished subheadings from the menu links by using text that is both larger and a different color (dark grey versus blue). Spacing between links is ample, but not overly broad.

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Menu Mobile

Image 82. Duke Energy Intranet Mobile Menu. On mobile, the global navigation links appear in an accordion menu. *82_DukeEnergy_06_MegaMenu_Tools_Mobile.png*

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Menu Mobile, Highlights

The accordion menu's visual design communicates both the hierarchy of the navigation links and the availabiity of additional links.

1. **Level-one menu links:** The topmost global navigation commands appear in large grey all-capital letters on a dark blue background. This is the most prominent visual of all of the menu links.
2. **Level-two menu links:** Second-level commands appear in slightly smaller blue text on a light blue background. The text links are in title case (that is, only the first letter of each word capitalized) and are left-aligned with the topmost menu commands. This visual treatment—background, color, capitalization, and alignment—make these commands seem less important than the first-level commands, but more important than the third-level commands.
3. **Level-three menu links:** The text of third-level commands is the same size and color as in level-two, and it also appears in title case; the big difference here is found in the third-level background color (white) and the deep indentation of the text, both of which clearly convey priority.
4. **Expand and collapse:** Menu links with sub-choices have a plus or minus sign on the right, while menus with no sub-choices leave the area on the right blank. The plus icon alerts users that sub-choices exist, while the minus indicates that a section has already been expanded and that clicking the minus icon will collapse it.

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myHR Menu

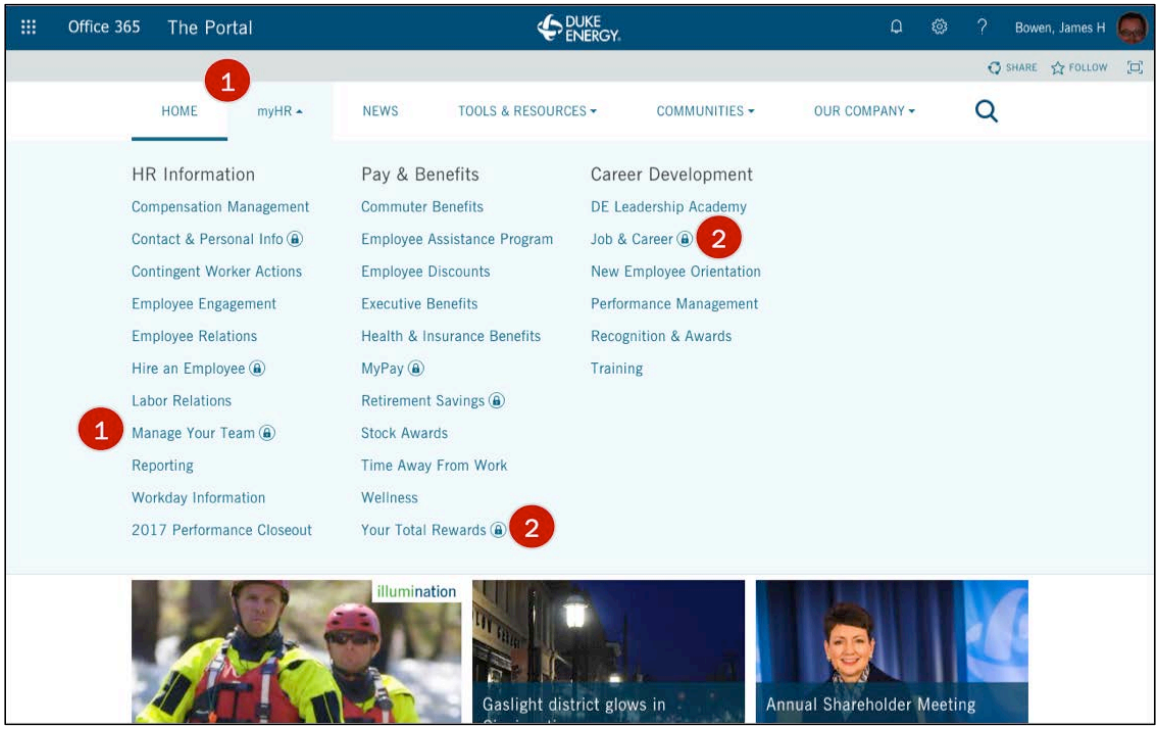


Image 83. Duke Energy Intranet *myHR* Menu. The *myHR* menu is personalized to the user's role and hides links to any sections that the logged-in user cannot access. *83_DukeEnergy_07_MegaMenu_MyHR_Desktop.png*

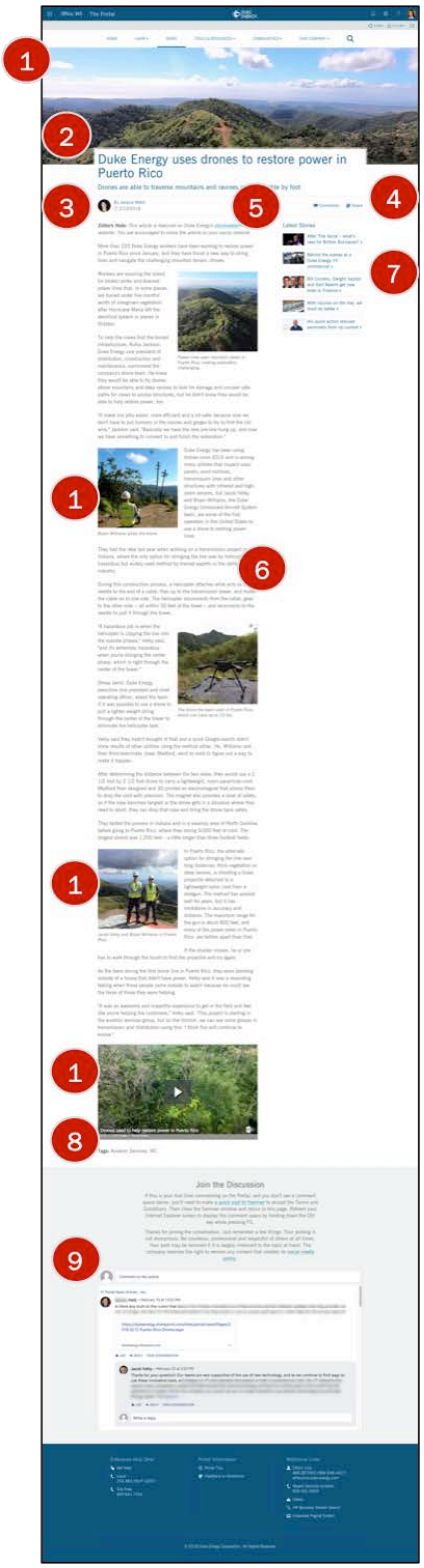
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myHR Menu, Highlights

The *myHR* menu has some sophisticated work happening in the background and leads to secured sites that are not part of The Portal. Also, the logged-in user's role dictates which menu links are visible or hidden.

1. **Personalized:** The menu is personalized to the logged-in user. Thus, only employees see the top-level *myHR tab*; consultants without access don't see it at all. Likewise, some sections within *myHR* are visible only to managers, and only executives see the *Executive Benefits* section. Hiding menus and submenus can be a good way to help prevent employees, consultants, and temporary workers from feeling alienated and constantly reminded of benefits they don't have. It also helps protect content that regular employees should not have access to, such as management-specific information. Clearing the decks of inaccessible content also eliminates unnecessary clutter and makes menus easier for users to scan.
2. **Vendor sites indicator:** Some links in the *myHR* menu lead to vendor sites, which are not considered part of The Portal. To help communicate the fact that clicking these links will mean leaving The Portal and opening a secure site, the team added a padlock icon to the right of all of such commands.

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News Article

Image 84. Duke Energy Intranet News. The news article pages offer narrow text columns and related photos, so readers can become easily absorbed in the content. *84_DukeEnergy_08_News_Article_Desktop.png*

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News Article, Highlights

News articles are presented in narrow columns, making the text easy to read. Images, videos, recent stories, tags, and commenting options increase the articles' appeal.

1. **Images and video:** A large photo related to the story appears at the top of the page, like a hero image. This is not done for every story, but the design intentionally built the template to accommodate these images to introduce the article in a visual way before the text begins. Smaller images appear inline with the article's text. Each image has a caption below it, describing the image. This added information makes the images more informative and pleasurable to consume. If the article includes a video, it appears in line with the text or at the top or bottom of the article, at the publisher's discretion. The video thumbnail shows a still image of part of the video; below it, small text describes the video, including its title, length, number of views, and location on The Portal.
2. **Title and subtitle:** The article title appears in very large blue text at the top of the page, with a stylish cut into the image above it. The subtitle, when there is one, appears in smaller blue text below the title.
3. **Author and date:** The author's photo and name appear next, along with the date the article was published.
4. **Social:** Links and associated icons for *Comments* and *Share* appear toward the top on the right. These visible links encourage employees to participate in the discussion, further enriching the sense of community at Duke Energy. *Comments* links to the comments at the bottom of the story.
5. **Shared on journalism website:** Duke Energy offers a public-facing branded journalism site called *Illumination.* On it, the company shares interesting stories related to Duke Energy with the public. It's noted under the byline when an article on The Portal is also featured on *Illumination,* and the note encourages employees to share the article outside work and with their social networks. Further, Duke Energy offers more than 425 physical digital signs located in office lobbies and cafes in its office buildings and facilities. News publishers can choose to have the article be included on these signs to make the content even more visible through more channels.
6. **Column width:** The column width of the article text is quite narrow, which makes it easy for users to read the article.
7. **Latest stories:** The five most recent stories appear in the upper right of the article page. Employees can thus easily see other news topics that might be of interest to them.
8. **Tags:** The articles tags appear below the article text.

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9. **Comments:** User comments appear at the bottom of the page. The publishers can choose to turn off the commenting feature if appropriate. The *Join the Discussion* section in grey above the comments is important; it informs users who have not already accepted the terms and conditions for Yammer, the commenting tool, they must do so before they can participate. On the positive side, designers say that using Yammer mostly meets the commenting needs of The Portal, and users have to accept the terms and conditions only once. But, on the negative side, designers report that having to sign the Yammer agreement has proven to be a barrier for some employees to provide comments, and that the link to the Yammer channel that appears with each comment is distracting.

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Advertising the New Portal

Image 85. Duke Energy Intranet—Advertising the New Portal. One of the many articles that were written about the new portal. It is rich with descriptions and screenshots of features, with the goal of getting employees amped up to use the new design.
85_DukeEnergy_09_Article_Announcing_New_Portal.png

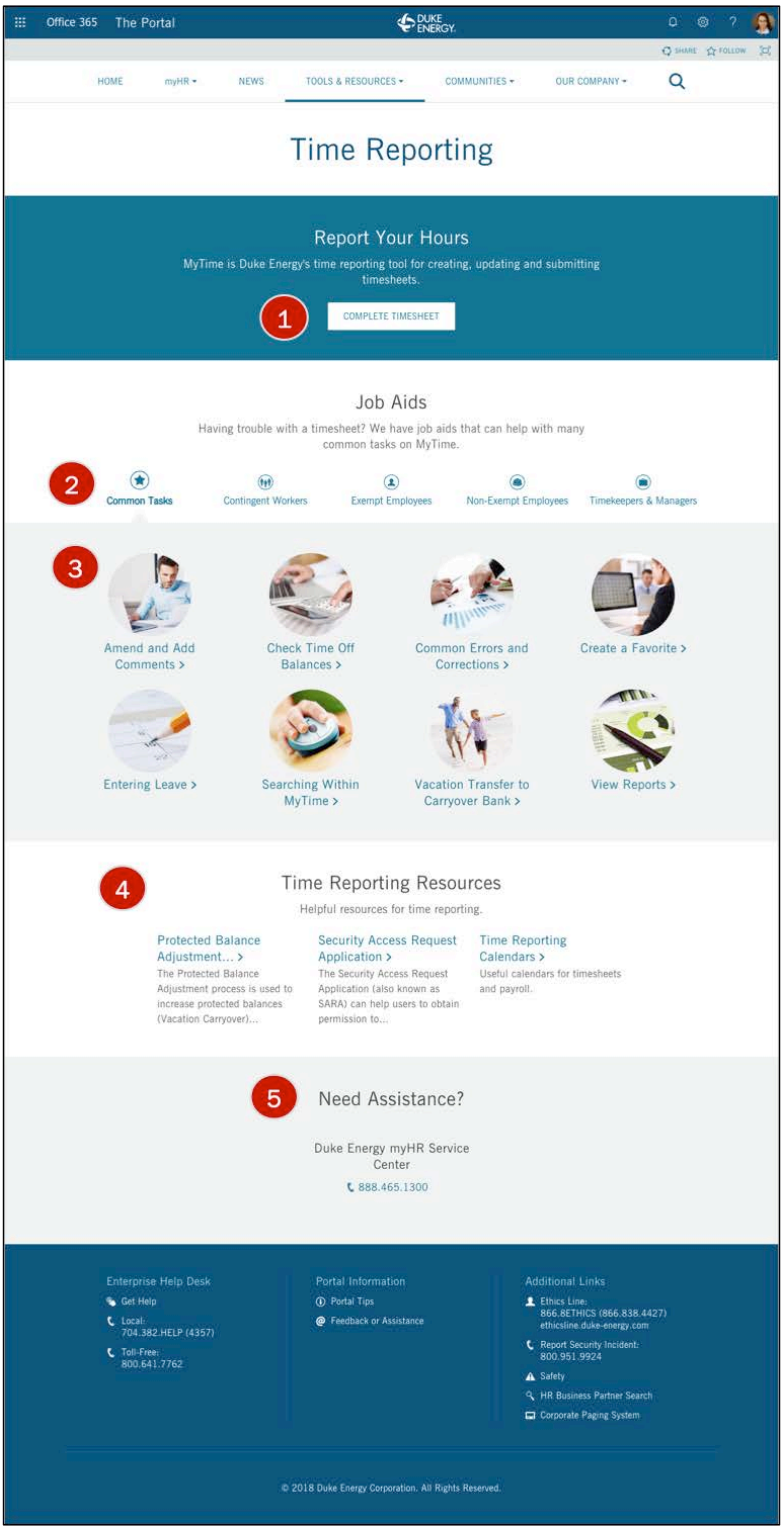
Order NNG190115-7904-48466

Advertising the New Portal, Highlights

For months leading up to the new portal's launch, the team published articles about the redesign and new features. This let users learn about it a little at a time and get excited about the change. The articles remain on the site today and are easily searchable.

1. **Launch article:** An article announcing that the new portal has gone live welcomes users and describes some of the site's features.
2. **Screenshots:** Screenshots of sections of the new design shows new features, which are described in the accompanying text. This got users excited to learn more and try out the new design.

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Time Reporting

Image 86. Duke Energy Intranet *Time Reporting*. Because time reporting is the most-used app, The Portal provides various resources to ensure that users understand how to do the task quickly and correctly. *86_DukeEnergy_10_TimeReporting_Desktop.png*

Order NNG190115-7904-48466

Time Reporting, Highlights

The *Time Reporting* tool is the greatest killer app on The Portal, as all employees must use it regularly to account for their time.

1. **Timesheet:** Employees can find the *Complete Timesheet* button at the top of the page. The note above the button describes the tool and its importance.
2. **Employee type filters:** Employees can filter tools and other available information related to time keeping using the links and associated icons. Choices such as *Exempt Employees* and *Non-Exempt Employees* help users to identify themselves and locate the tools the need.
3. **Job assistance:** Employees who have special situations or need more information can refer to the *Job Aids* section of the page. Here, each tool is named according to the task it relates to, such as *Entering Leave* and *Check Time Off Balances.* The tool labels are simple and clear, making it easy for users to find what they need.
4. **More resources:** Even more help is available in the bottom section of the page, which includes links to related resources (such as calendars).
5. **Assistance:** If employees need still more help, they can seek it via the phone number offered at the end of the page. Providing this additional contact information shows that the organization cares that employees understand how to do their tasks and makes resources available to help them. This is comforting to employees.

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Time Reporting, Mobile

Image 87. Duke Energy Intranet *Time Reporting*. The mobile *Time Reporting* area has all the same tools as desktop, but in a mobile-friendly layout.
87_DukeEnergy_11_TimeReporting_Mobile.png

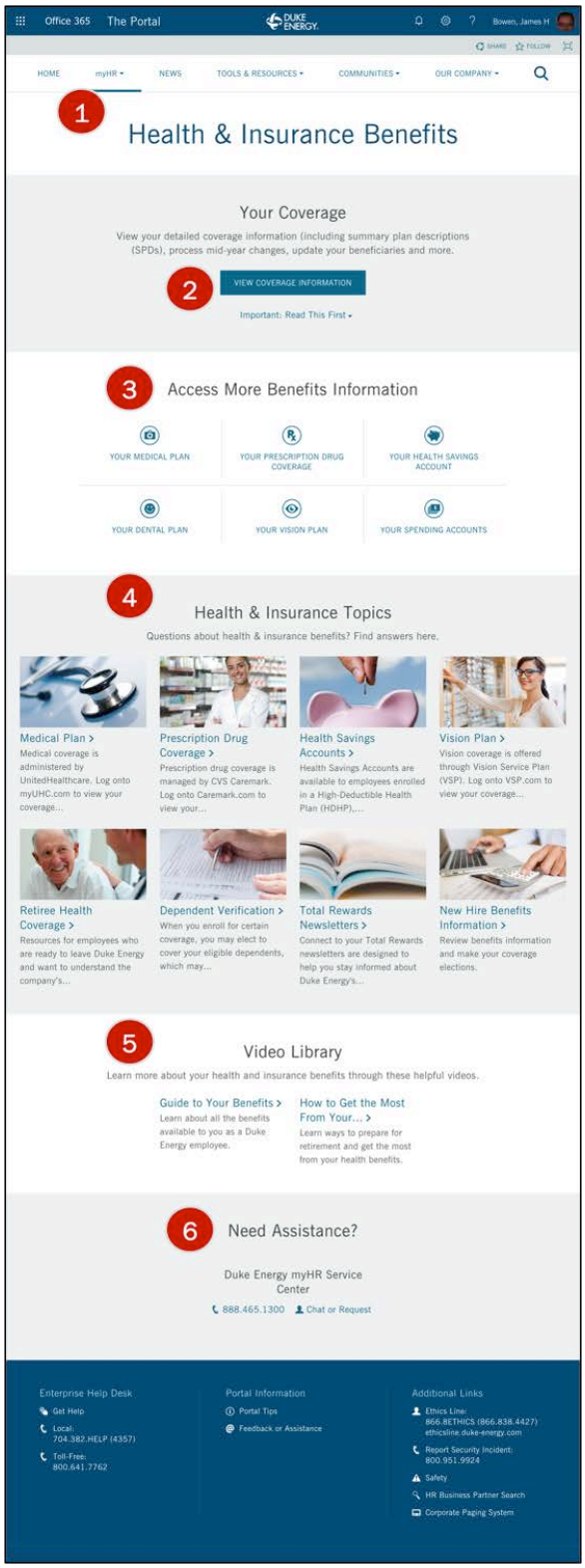
Order NNG190115-7904-48466

Time Reporting, Mobile Highlights

It makes sense that the most-used app would be easily accessible on mobile.

1. **Timesheet:** On mobile, the *Complete Timesheet* button is visible by default (and before swiping).
2. **Description:** The description of the timesheet tool is one of the first things users see when accessing the intranet on mobile.
3. **Helpful tools:** The *Job Aids* tools are listed vertically and easy to read.
4. **Resources:** Resources are also listed vertically on mobile.

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Employee Benefits

Image 88. Duke Energy Intranet Employee Benefits. Employees want the option to easily review their benefits at any time. The *Health & Insurance Benefits* section makes this a snap. *88_DukeEnergy_12_Health_and_Insurance_Page_Desktop.png*

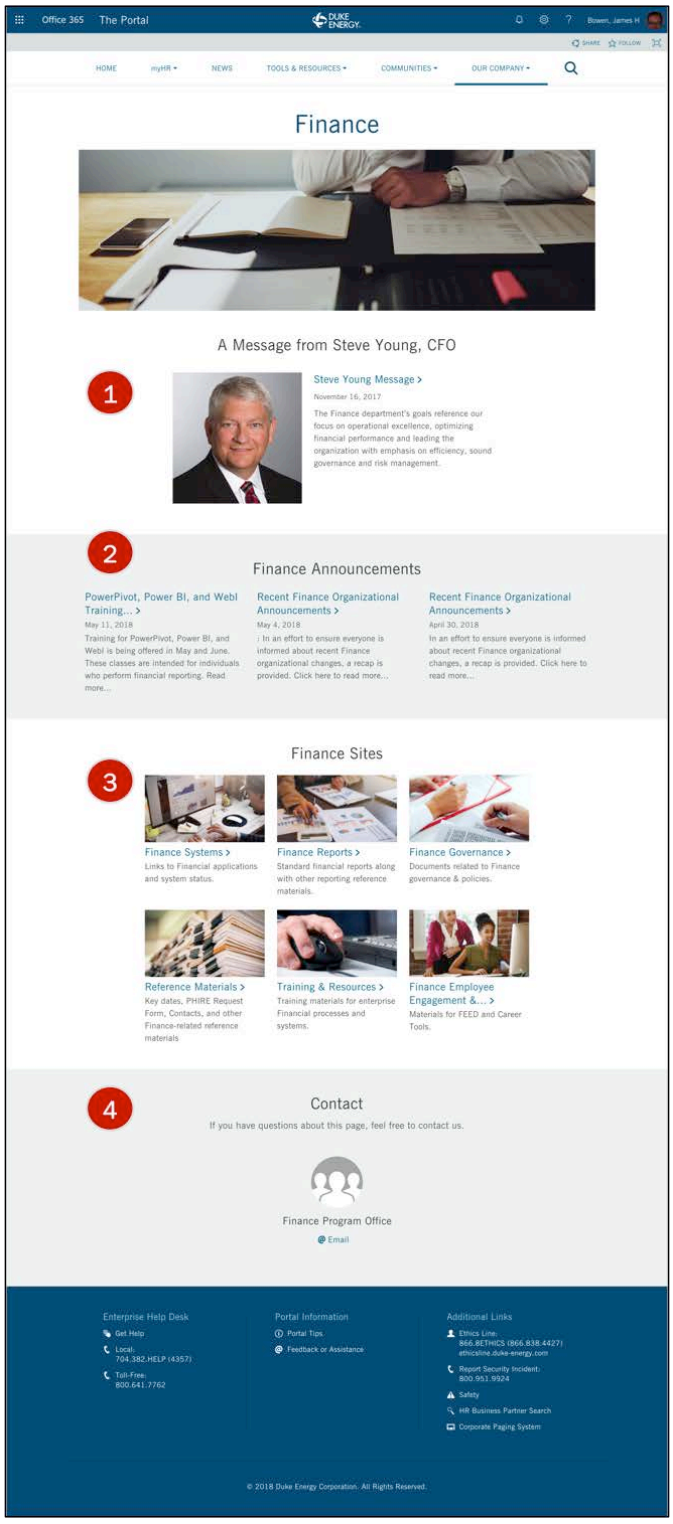
Order NNG190115-7904-48466

Employee Benefits, Highlights

Everything employees might want to know about their health and insurance benefits is consolidated in one area.

1. **Benefits:** Users can access their health and insurance benefits via the *myHR* global navigation link. This is in an expected place and is easy to find.
2. **Coverage:** The most relevant call to action is the *View Coverage Information* button, which appears at the top of the page and stands out in dark blue on the light background.
3. **More benefits:** The section in the center of the page consolidates other tools and sections related to health benefits, including medical and dental plans. Everything is clearly named and readily clickable.
4. **More topics:** The page's next section offers links to all the information users might need about health and insurance benefits, preventing them from having to hunt for them or call HR. What a time savings.
5. **Videos:** For even more information, related videos appear as links with descriptions at the end of the page. (Note that, in most cases, site videos display in a custom video player web part; here, however, that web part wasn't used as the videos link to a third-party vendor-hosted site.)
6. **Contact:** The *Assistance* section offers a phone number and option to chat. This helps employees get quick answers to any outstanding questions they may have.

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Finance

Image 89. Duke Energy Intranet Finance Department. Like many departments, the Finance Department has its own intranet section with links to important pages and a message from the leader. *89_DukeEnergy_13_Finance_Desktop.png*

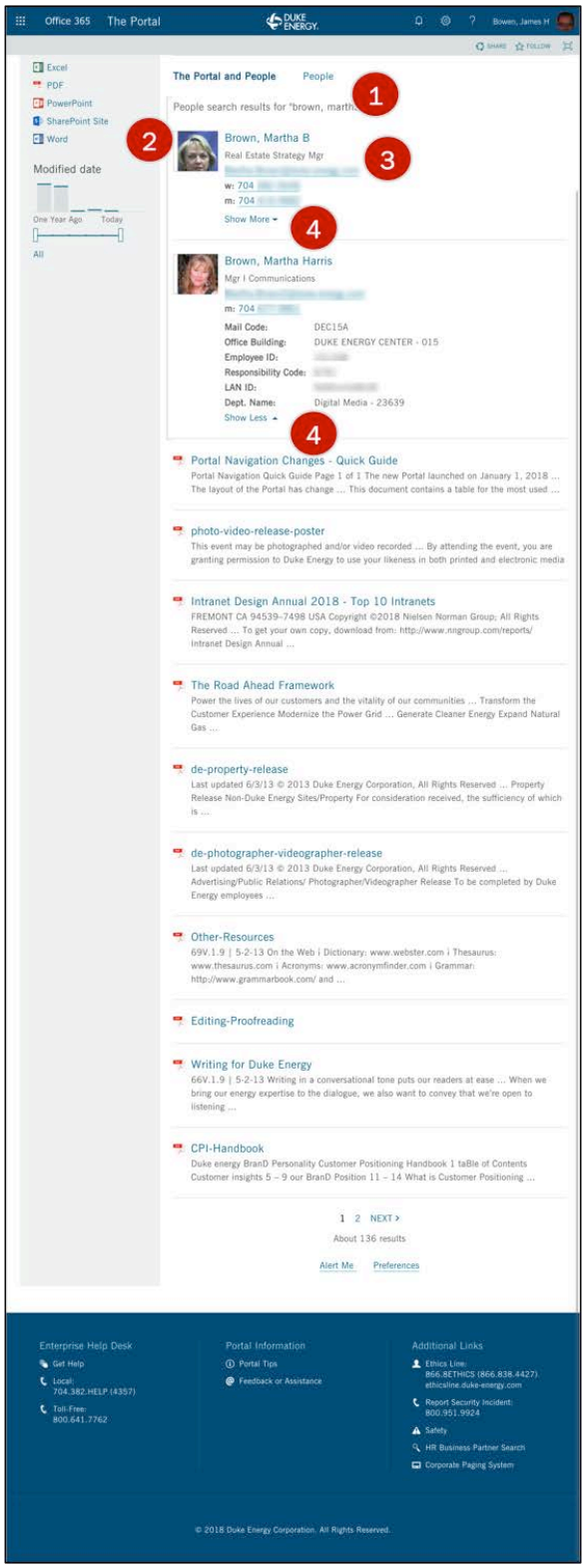
Order NNG190115-7904-48466

Finance, Highlights

Like many departments at Duke Energy, the Finance Department has its own area on The Portal that describes what the team does and offers links to related pages. This and other department pages help employees better understand the organization, what makes it tick, and which resources are available; links to department pages are accessible via the *Our Company* global navigation menu.

1. **Leader message:** The department leader—in this case, the CFO—offers a message at the top of the page. The link leads to the full message and is accompanied by a summary, the date, and a photo of the leader. The leader's name and title also appear at the top. Such features help employees easily become familiar with organization leaders and their ideas. This message was created in the *Leadership Message* web part, which was designed so that all executives could easily share information. This is a great way to communicate to employees and demonstrate that leadership respects them and wants to keep them informed.
2. **Announcements:** Three or fewer announcements can appear at once, and each announcement has an expiration date set at its creation. This is to prevent old announcements from sitting forever and getting stale on The Portal. It also means that announcement authors write only information that is indeed temporary in this area. The *Announcements* web part was created with these smart safeguards in mind and to give people a place to advertise timely information.
3. **Related sites:** Websites related to the Finance team are listed in the *Finance Sites* section. Listing sites by topic and with a short description helps employees decide which sites are right for them. This sites section was created in the *Navigation Pod* web part, which offers rectangular images and links.
4. **Contact:** The contact section at the end of the page shows the Finance Department's email address. This section was created with the *Contact* web part.

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Profile SERP

Image 90. Duke Energy Intranet SERP Profile. At the heart of the Duke Energy organization are its employees, each of whom has a profile document. The most important information from the profiles appears in related search engine results. *90_DukeEnergy_14_SearchPeopleDetails_Desktop.png*

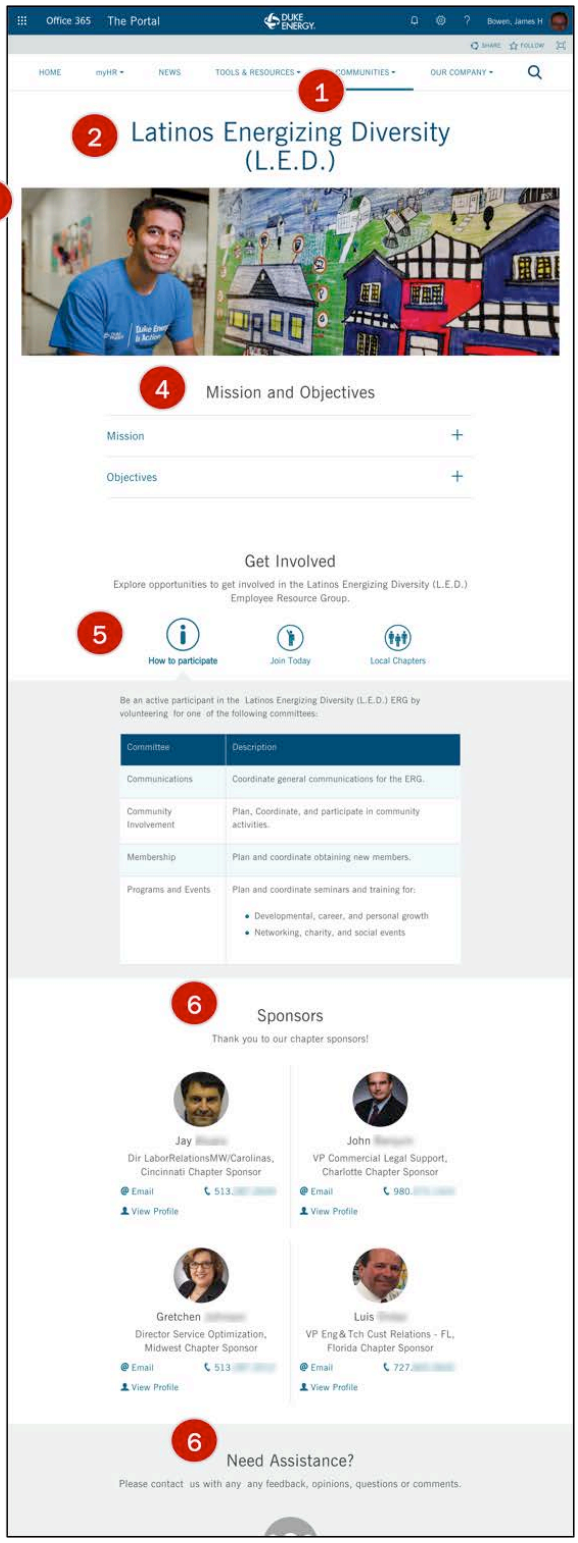
Order NNG190115-7904-48466

Profile SERP, Highlights

The user profile (provided through Delve, a popular tool outside The Portal) offers a variety of information about employees. The Portal team ensured that searching for a person in The Portal would return the most important information—especially the phone number—on the SERP.

1. **Query:** The name queried is repeated at the top of the SERP.
2. **Photo:** The person's photo appears in the result, making it easy to put a name to a coworker's face.
3. **Name and information:** The person's name appears as a link; clicking the link opens that person's profile. The SERP also includes job title, email, and phone numbers.
4. **More information:** The *Show More* link reveals more information on the SERP, including building and department. It's helpful to get such information without having to leave the page. Clicking the *Show Less* link collapses these items, creating more room for search results on the page.

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Communities

Image 91. Duke Energy Intranet *Communities*. All types of employees and locations are represented in The Portal's *Communities* area. *91_DukeEnergy_15_Community_Desktop.png*

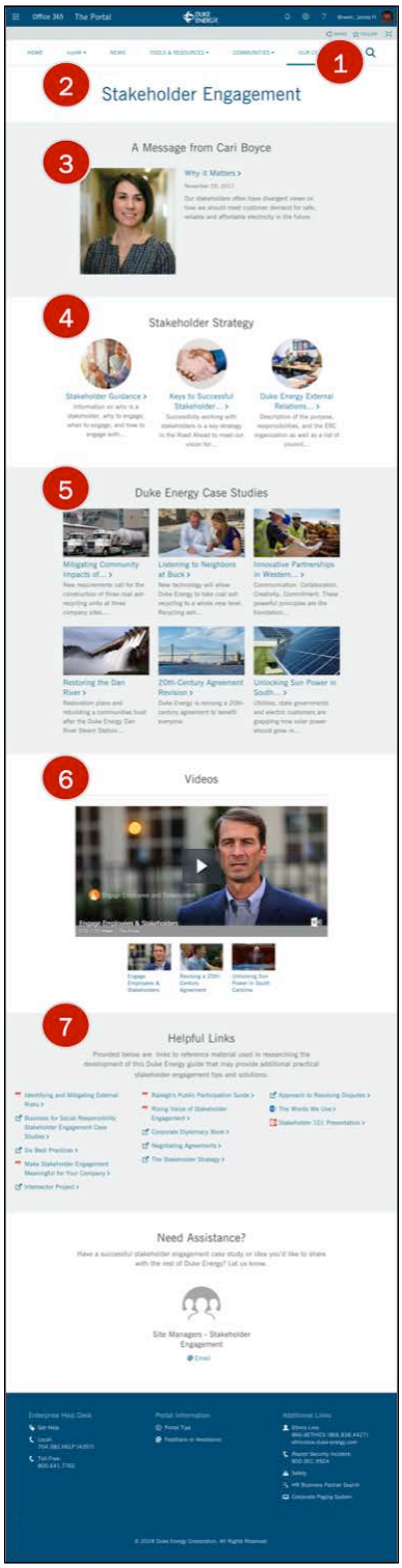
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Communities, Highlights

The site's *Communities* section lets all kinds of groups and locations have an intranet presence. This can make the organization feel highly inclusive, and can help all employees feel that they are valued and part of the overall team.

1. **Navigation position:** Listing the *Communities* section in the global navigation is new in this version of The Portal. The team made this change to make communities easier to find.
2. **Title:** Latinos Energizing Diversity (L.E.D.) is one of the Employee Resource Group sites in the *Communities* section.
3. **Image:** The hero image gives a sense of what this community is about, and injects the page with character and personality.
4. **Mission and objectives:** The first section of the page summarizes the community's mission and objectives, without assuming any knowledge about the community on the part of users. This is a positive, all-encompassing approach for describing any community or department. The custom *Accordion* web part is useful for managing the amount of text that displays on the page and for grouping content in meaningful ways. It is often used for FAQs.
5. **Tabs:** The *How to Participate* tab displays a table with specific steps that employees can follow to get involved. This is a great way to be transparent and to boost confidence among possible new members. The *Join Today* tab is a great call to action, and the link reveals how to join. Each local chapter of L.E.D. has its own SharePoint site (which may change to SharePoint Teams in the future). Users can find links to these sites under the *Local Chapters* tab. This section uses the *Tabs* web part and icons from the Icon Library, which has hundreds of icons that are used for all Duke Energy digital channels.
6. **Sponsors and contacts:** The page's last two sections display the community's sponsors and their contact information. This enables anyone who wants to get in touch with a human to do so.

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Stakeholder Engagement

Image 92. Duke Energy *Stakeholder Engagement*. Leaders at Duke Energy often share their views with employees. *92_DukeEnergy_16_StakeholderEngagement_Desktop.png*

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Stakeholder Engagement, Highlights

The Portal supports the organization's strong culture of leadership and the ways it communicates with employees. Designers provide several ways for leaders to accomplish this on the site, including by offering a *Stakeholder Engagement* section.

1. **Location:** The *Our Company* section of the global navigation houses the intranet's *Stakeholder Engagement* section.
2. **Leader communications:** Duke Energy *Stakeholder Engagement* leaders take turns offering messages in this section of The Portal.
3. **Message:** The leader, his or her photo, the message title, and a summary of the message appear at the top of the page.
4. **Strategy statements:** Understanding strategy helps employees see how their day-to-day work fits into the overall company plan. In short, strategy statements give employees a sense of purpose and meaning. The page's *Stakeholder Strategy* section links to strategy statements related to different efforts.
5. **Case studies:** The *Case Studies* give employees further insights into how the leaders put their plans into practice.
6. **Videos:** A more personal way to get a message across is through a video. Leaders record these as a way to connect further with employees, no matter where they are located. The *Video Player* web part can play up to 12 videos from the O365 Video Portal.
7. **Further information:** Links to resources that contributed to the page content, along with additional sources, appear toward at the bottom of the page.

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Stakeholder Engagement, Mobile

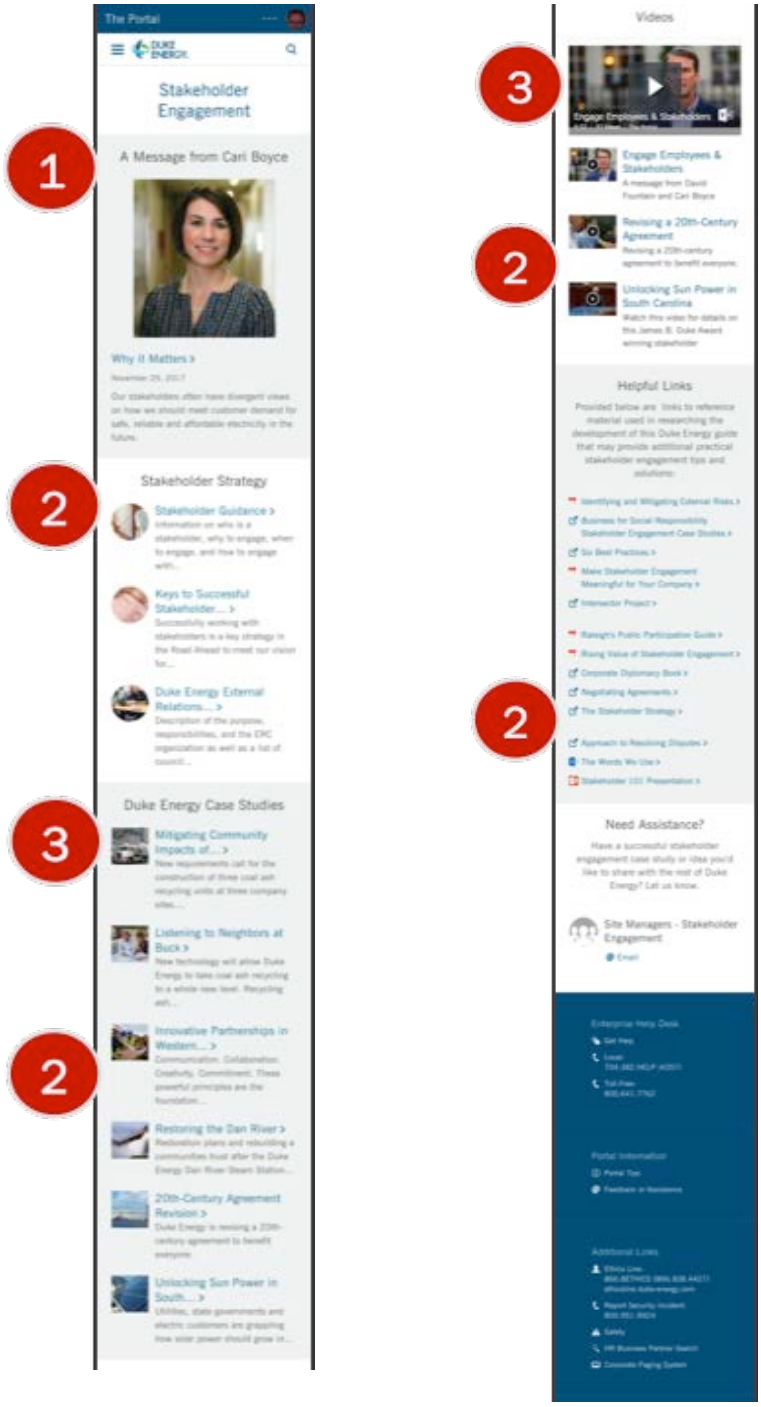


Image 93. Duke Energy Intranet *Stakeholder Engagement*, Mobile View. Like all portal pages, the *Stakeholder Engagement* page is mobile friendly. *93_DukeEnergy_17_StakeholderEngagement_Mobile.png*

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Stakeholder Engagement, Mobile Highlights

The *Stakeholder Engagement* page is easy to scan and read on mobile phones.

1. **Priority:** The most important content—the leader's message—appears on the screen by default, with no swiping required.
2. **Vertical:** Content is displayed vertically, instead of horizontally, on mobile.
3. **Images and video:** Images and video display smaller on mobile than on desktop to accommodate the smaller viewable area.

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Design Guide

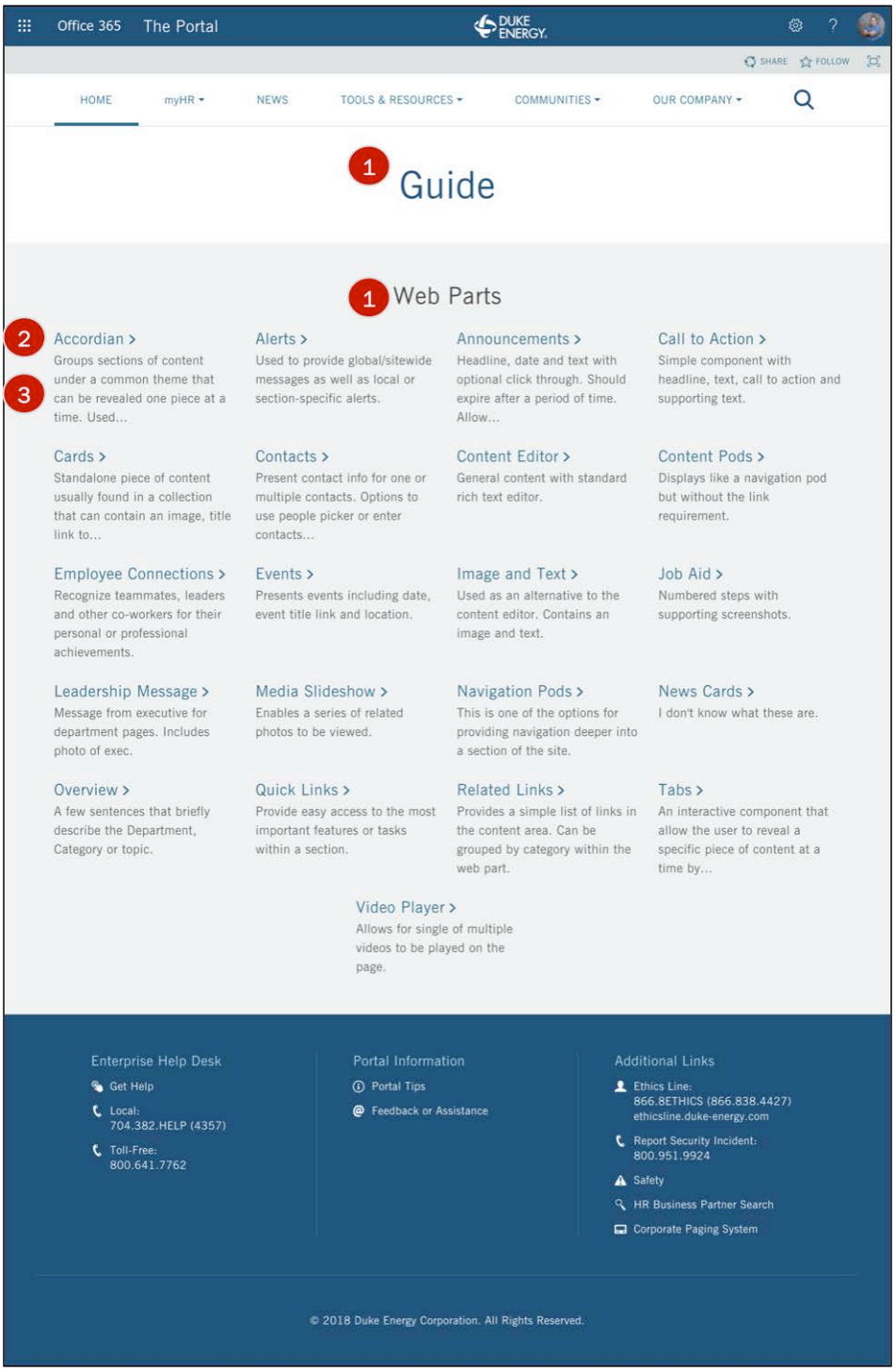


Image 94. Duke Energy Intranet Design Guide. The UI design guide offers descriptions for the many web parts available to designers.
94_DukeEnergy_18_Guide.png

Design Guide, Highlights

Roughly 120 site managers manage the content for about 100 sections of The Portal. To speed up design, make it the highest quality, and keep it consistent across sites, the team created the *Guide*. The *Guide* acts as a UI style guide and pattern library for site managers. It results in a better UX for all employees using The Portal, as well as a better process for site managers and the intranet team as a whole.

1. **Title and subtitle:** This page, like all pages on The Portal, has a title, letting users know what the page is about. The subtitle tells users what these items are—here, *Web Parts.*
2. **Web part name:** The name of the web part is written in large blue letters. The name acts as a link to the page for that part.
3. **Description:** A short description of the web part follows the name.

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DESIGN PROCESS AND USABILITY WORK

Analysis and Research

The redesign project began with the team thoroughly reviewing the old site, analyzing usage metrics, and determining which content delivered the most value to employees based on both the number of people who used the content and the frequency of that use. During this review, the team also looked for recurring patterns and themes. For example, how often were site managers publishing messages from leaders, organizational news, and status updates on goals? How frequently were they linking to applications or to other sites? What types of information was lurking in Word documents and PDF files that would be more accessible and mobile-friendly if it were converted to web pages? What similarities existed between different types of sites, regardless of whether they were focused on tools and applications, departments, news, or other topics?

With the insight gained from this thorough review, team members created content categories. They then began designing web parts for each category, such as a *Call to Action* web part for links to applications. Other web parts included *Leadership Messages*, *Announcements*, *Contacts*, and *Media Slideshow*. In total, the team identified 30 web parts for different content needs. Creating custom web parts let the team design an experience that was true to the Duke Energy brand and consistent with other Duke Energy web channels. It also created the best UX.

Next, the team came up with suggested web part pairings; these led to prototypes for different types of pages as well as to basic guidelines. For example:

- Department pages would have *Leadership Messages* at the top, followed by *Announcements*.
- Pages with links to applications would have a *Call to Action* web part at the top, drawing the focus of the page to the key task.
- Pages should have only one *Call to Action* so that users wouldn't be confused by competing priorities.

On the old portal, links to launch applications were sometimes obscured by lots of qualifying text, making them hard to find. The new page templates were designed to put the focus on task completion. Also, because topic pages break content into small chunks and are built around a single topic, pages are easier to scan and more mobile friendly.

The goal was to create a design that supported flexibility, while ensuring a consistent and responsive UX across every page in each of the approximately 100 sites that make up The Portal.

As part of their analysis, team members reviewed Help Desk tickets to identify trends or problem areas with the old Portal, and they have continued to review tickets since the launch. This information led to some changes in global navigation. For example, the team added *Manage Password* to the megamenu, and added Help Desk links and phone numbers to The Portal footer, so that they appear on every page. Since the launch, the team has also added a *Chat Now* link to the footer.

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Each year, the team reviews the Nielsen Norman Group's Intranet Design Annual together, usually over pizza and a very long lunch. The Portal Product Owner belongs to the Digital Workplace Group and attends meetings and webinars to get insight into the intranets and best practices of other companies.

Design Methods

The team used a variety of tools and methods to redesign and refine the new intranet, including:

- **Prototypes:** Design prototypes were built in Axure, constructed in HTML, and then developed in SharePoint Framework (SPFx). The team reviewed each web part as it was designed as well as during the Sprint Review sessions it held every two weeks (in keeping with Agile Scrum ceremonies).
- **Applying metadata to content types:** Knowing that time was short and that the process for designing and building the web parts would keep the Design and Development Teams busy throughout the year, the Content Team began uploading content to libraries so that it would be ready when it was time to build web pages. The team analyzed the content and created content types and defined the associated metadata. Team members then looked at usage reports from the old portal to determine which files could be left behind. They uploaded any content that was less than two years old and had been accessed by employees, assigning content types and entering metadata during the process.
- **Rethinking the homepage:** A focus on the homepage came late in the project because its needs were unique and the web parts for the rest of The Portal had to be available first to build the large volume of sites. Nowhere is a shift to a cleaner, more streamlined experience more critical than the homepage, and nowhere is space more coveted, so the team was fortunate to have the support of key stakeholders in achieving this delicate balance. The first decision was to move from a two-column layout to a single column to create the optimal mobile experience. Other changes included rethinking the quick links, the story layout, and the old *Employee Corner* feature. The redesign of each feature required research and a focus on use:
    - ***Quick Links*:** Watching users navigate the old portal confirmed that they often used a *Quick Links* section to navigate to popular tools such as *Time Reporting* rather than clicking through the global navigation and megamenus. The new design thus features *Quick Links* more prominently, right below the news. The *Quick Links* are based on metrics that indicated The Portal's top tasks, supporting the team's focus on creating a design that helped users find and complete key tasks quickly.

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- **News:** The old site had a carousel for news stories, and watching users interact with it revealed that they were not clicking through to see the various stories. As a result, important news was going unnoticed. To address this, the team designed a *Mosaic* web part that displays up to six stories at a time. If an unusually important news story arises, the *Mosaic* can display a single story, filling the space and giving the story added prominence on the page.
- ***Employee Corner*:** The old *Employee Corner*, which featured employee service anniversaries, promotions, organizational announcements, and "high fives" (a recognition program), was renamed *Employee Connections* and given more space. Duke Energy has a century-long history of service, and many employees have worked for the company for 40, 50, and sometimes even 60 years. Honoring this tradition of commitment and dedication is very important. This feature was always popular with employees, and with the new portal, the team enhanced it by adding employee photos. Since then, usage has increased substantially, and the submissions are often backlogged for several days to allow enough time for each submission to be seen before it moves on to make room for the next.

Once all of the content was uploaded and the most frequently used web parts were built and available for use, the content team began building pages and training the 120 site managers who were ready to review the drafts of their sites and revise as needed. The final web parts were added to pages as the parts became available in the weeks before launch.

Refining the Information Architecture

Early on in the project, the team worked to refine the global navigation and IA, conducting card-sorting and tree-testing exercises. Card sorting led to various new groupings and labels that were then validated (or invalidated) through tree testing. Different groups of users were given different navigation structures, and tree testing revealed which were most effective in helping users find tasks they needed to complete.

The most significant IA change was to eliminate a section that was for managers only, consolidating that information into the rest of The Portal. The site now uses audience targeting and document libraries with manager-only permissions as needed. Also, the departmental information previously housed under the *Work-Related Sites* section was moved under *Our Company* and into subgroupings labeled *Operations* and *Corporate Departments & Initiatives*. Further, *Services Center* became *Tools & Resources*, and the *About the Portal* section moved to the footer and was renamed *Portal Tips*. A new section, *Communities*, housed the old *Regions* sites, along with sites for employee resource groups, which was not listed in the old portal's global navigation. This move made the information easier to find. Care was also taken to separate tool- and application-based sites from informational sites by putting them in either the *Tools & Resources* section or the *myHR* section.

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Solving Navigation Challenges

Designing a global navigation can lead to many debates over preferences. Tree testing not only helped inform the best design for the Duke Energy intranet, it also provided quantitative data about what users found most helpful. These tests gave the team insights into best practices it could apply to the new site. Following are a few of these insights:

- **Use nonbranded names:** The team adhered as closely as possible to the practice of using nonbranded names in navigation, opting instead for common, everyday language. This is particularly helpful for new employees who may not know the names of applications or understand company acronyms.
- **Use short names:** Keeping names as short as possible is also helpful and makes the megamenus easier to scan.
- **Use alphabetical listings:** Listing sites alphabetically in the megamenus is helpful; any other approach is potentially confusing to users and difficult to defend with stakeholders.
- **Keep megamenu size in check:** On large intranets, megamenus can easily become so large that they're overwhelming. The team designed the *Navigation Pod* web part to help shift the burden from the menus onto the pages, which represents a different way of thinking about where navigation may be found. *Navigation Pod* web parts are used within the body of pages to link to relevant topic pages within the site. This keeps those topics out of megamenus and into logical groupings on prominent pages. *Navigation Pods* feature rectangular or circular images, with a link title and an optional short description for each pod. They're designed to be easy for users to scan.
- **Keep browse and search in close proximity:** Combining search with the megamenus accommodates users who like to browse as well as those who prefer to search.

Although the team views the current global navigation design as solid, ideas for improvements are being considered and tested. The menus are large, and although they offer an important view into everything The Portal offers, other design options might make the information easier to consume.

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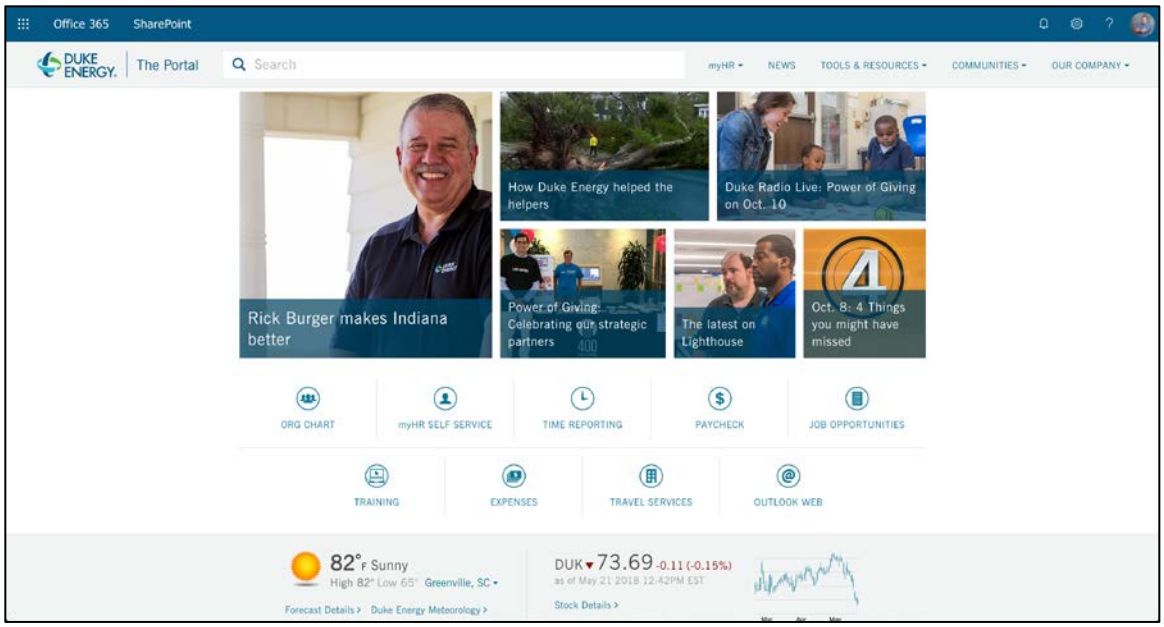


Image 95. Duke Energy Intranet Future Navigation Option. This is one option the team is evaluating for possible changes to the top navigation and search. The goal is to make search more prominent. In this design option, the Duke Energy logo and The Portal title move to the left of the navigation and out of the top bar. *The Portal* would replace the *Home* heading in the global navigation. In this design, the search bar remains open, whereas in the current design it can be opened by clicking the magnifying glass. Also, here, the headings in the global navigation shift to the right. *95_DukeEnergy_19_Possible_New_Design_Top_Nav_and_Search.png*

Adoption and Buy-In

Because Duke Energy employees have used various versions of The Portal for 17 years, it has widespread brand recognition and a well-established adoption rate; this is especially true give that it is the default homepage on Duke Energy workstations and employees use it for single sign-on to applications they use frequently.

Before launch, the team created several homepage stories about the features and design of the new portal, preparing employees for this change. The stories included video highlights. Also, a story with additional videos and details about the changes was published on the launch date. The team engaged in other outreach activities as well to remind employees that The Portal was coming soon:

- **Pre-launch weekly email:** In anticipation of the relaunch a weekly email, *This Week @ Duke Energy*, was sent to all employees to remind them that the new portal was coming. It provided links to stories and videos on The Portal's homepage.
- **Email reminder for managers:** Managers also received an additional email reminder in a monthly *Managing Ahead* distribution.

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- **Yammer hashtag:** At launch, the team created a portal hashtag in Yammer so that it would be easier to find and engage with employees who posed questions or gave feedback on the new portal.

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Cardinal Solutions A digital solution provider with specialists in all things SharePoint **Note:** In August 2018, Cardinal Solutions was acquired by Insight.	• SharePoint Framework (SPFx) development of web parts • SharePoint consulting and expertise • Imagery selections

GOVERNANCE

Ownership

The intranet has been owned by Corporate Communications and supported by a Digital Media team for the past seven years. Prior to 2010, the intranet was owned by a Shared Services organization. The Digital Media team enjoys a close partnership with the Employee Communications team, which manages the homepage content.

In October 2017, the Digital Media team—and intranet ownership—moved to the Marketing & Customer Engagement team. Because the Digital Media team also supports the external website, www.duke-energy.com, which is closely aligned with customer strategies, the reorganization focused on keeping internal and external digital design under one umbrella.

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INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Portal Product Owner	• Provides program management, establishes governance, prioritizes enhancements, maintains roadmap, reviews and signs off on designs, gathers feedback from sponsors and stakeholders, chairs advisory council
Core Portal Team	• Designs, develops, and supports The Portal
Agile Lead	• Conducts Agile ceremonies, assists Product Owner with managing the Jira Board (the work management tool), manages Risks and Impediments register, coaches team on Agile practices
Sponsors	• Remove impediments
Site Managers	• Manage content on approximately 100 portal sites
Employee Communications Team	• Manages content on the homepage and *News* site
HR Team	• Manages the integration with HR tools and systems and oversees the content on *myHR* sites
O365 Team	• Supports the SharePoint Online environment
Portal Advisory Council	• Meets quarterly to review The Portal roadmap, align strategies, and suggest enhancements • Advocates for portal initiatives

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URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://dukeenergy.sharepoint.com/sites/portal/
Default Status	The intranet is set as the homepage on every Duke Energy workstation. Although users can change the setting, when new workstation images are deployed (with security patches, etc.), the changed setting is overwritten and reverts to The Portal.
Remote Access	Users can access The Portal on any browser on any device. When off the network, The Portal requires two-factor authentication provided through O365. *Note:* Although The Portal will work in most browsers, Duke Energy provides support only for Microsoft browsers (IE, Edge). At this time, portal metrics are unavailable, as a metrics tool has not been implemented. In the future, the team hopes to have access to more information about remote users and their devices and browsers.
Shared Workstations	Many users access the site on shared workstations at all types of power generation and distribution facilities. These workstations are usually centrally located near offices and break rooms. Because these workers are not office-based, they may not have an assigned workstation. However, in the past two to three years, many non-office workers have been issued company tablets and laptops to ensure that they have the tools they need to work effectively.

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TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2001	• First intranet launched
2009	• Intranet moved to SharePoint 2007 platform with minimal changes
2010	• Visual redesign
2011—2012	• Acquired Progress Energy and consolidated intranets, retiring the Progress Energy intranet and adding approximately 10,000 intranet users
2013	• Attempt to upgrade to SharePoint 2010 was postponed indefinitely due to technical challenges
Q4 2015	• Preliminary concept work around revising the IA
2016	• Acquired Piedmont Natural Gas and consolidated intranets, retiring the Piedmont Natural Gas intranet and adding approximately 2,500 intranet users
January–December 2017	• Created new intranet, with new design, on SharePoint Online
Overall redesign timeframe: 12 months	

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CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Contributors	• Approximately 120 site managers create and update pages and manage content in libraries • Approximately 35 content contributors manage content in libraries, but are not able to create or update pages In most cases, site management is only part of a site manager's job function. When sites are created, the business must identify at least one site manager—and preferably two. More than two is discouraged because it increases the number of people who must be trained and supported by the core portal team. The team also discourages appointing contractors to site manager roles because it results in frequent turnover.
Management	The content team conducts ongoing site reviews and reaches out to site managers when it finds items of concern. The team specifically looks for pages and documents that are lingering in an unpublished state, new lists that might not follow naming standards, and new document libraries that may need to have content types and versioning applied. In the future, the team will also look for content that has not been modified within the previous six months. As sites are audited, the team asks site managers to confirm that their roles have not changed, and also asks for any input on topics that might require additional advanced training.

Training Content Contributors

The Portal team uses a variety of methods to support content contributors, including:

- **Monthly training sessions:** Before they're given access, site managers must attend a two-hour training session offered by The Portal team. Classes are offered in person, but can be attended virtually. Training is usually offered monthly, based on demand.

  Content contributors are not required to attend training because their work is standard SharePoint library management, with nothing unique to The Portal other than entering metadata fields that have been assigned to the libraries.

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- **Yammer channel:** The Portal team also manages a Yammer Channel for site managers where updates, reminders, and tips are posted. Sometimes emails are pushed to the site manager group using a distribution list.
- **One-on-one training:** Site managers can, and often do, request assistance from the team when making changes to their pages. The Content Team schedules time—usually through Skype sessions and screen sharing—to provide extra one-on-one training as needed.
- **Video library:** The Content Team is beginning to build a video library that will contain videos that demonstrate how to use each web part.
- **Portal Guide:** The team created a portal *Guide* site that gives examples of each custom web part and all of its possible configurations, along with any rules or standards governing the web part use. This is intended to help site managers best choose web parts that meet their needs and support the overall design. It has an added benefit of making testing easier by putting all the web parts together in one location.
- **Resources site:** A *Site Manager Resources* site offers training and support materials, including a training manual, a presentation, and links to job aids and videos.

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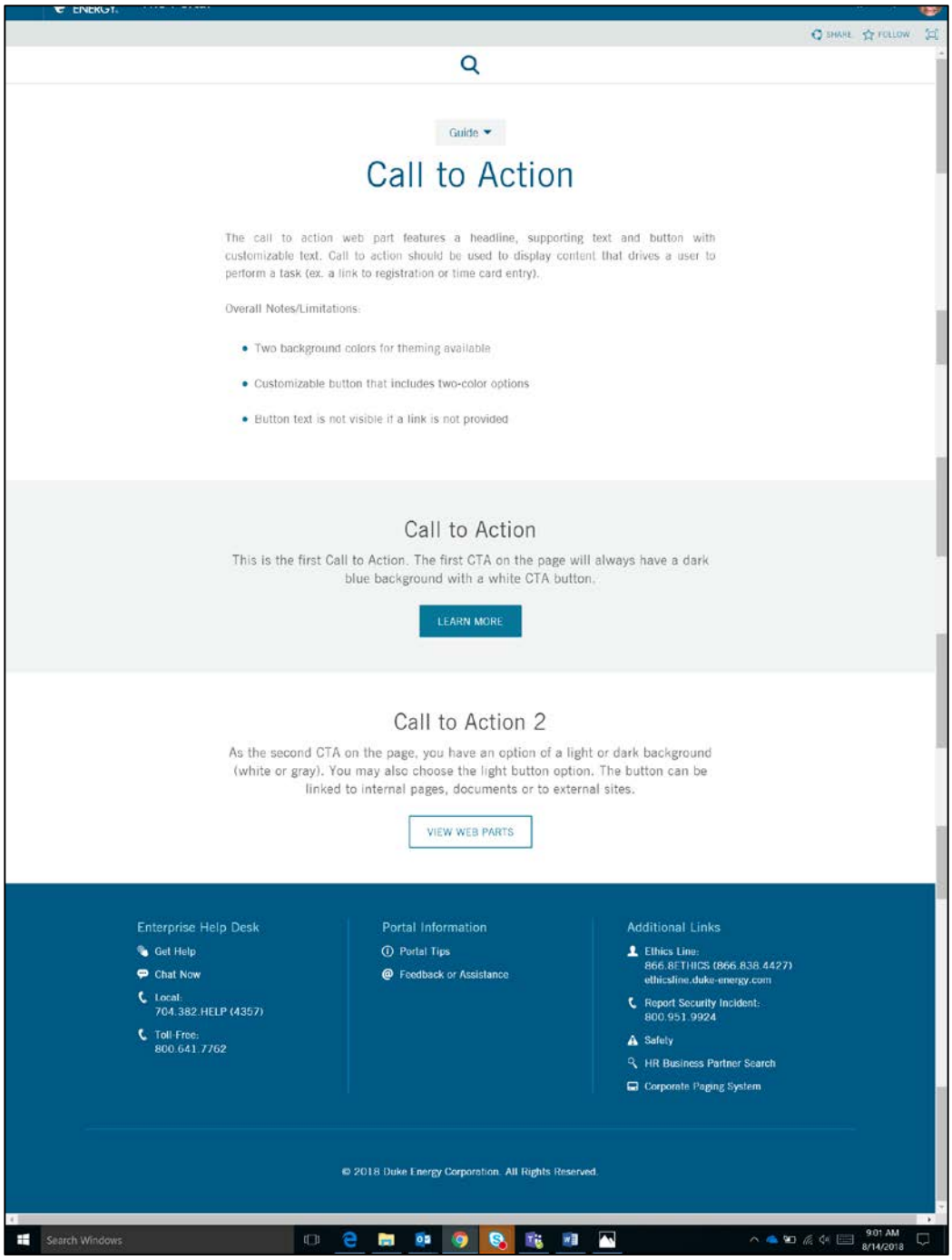


Image 96. Duke Energy Intranet Portal Guide. This is a sample page from the intranet *Guide*, which offers information on how to use the *Call to Action* web part and two example configuration options.
96_DukeEnergy_20_PortalGuide_CTA_page.png

Supporting Site Managers Before and After the Relaunch

During the design project, site managers were invited to attend project updates and get demos of work that was in development. They were also invited to Sprint Review sessions during the last few months of the project so that they could receive ongoing updates on the web parts and the sites being built.

To expedite the site build, The Portal Content Team built the initial pages for each site. Training classes were offered in person (and virtually), with class sizes limited to 20 people. The sessions were four hours long; the first two hours were instructor-led, and the last two were hands-on, with Content Team members available for coaching. The sessions were held over an eight-week period, and site managers were invited as their sites were built, so that the training was "just in time" and they could immediately begin working.

Over the project's last eight weeks, the Content Team held weekly all-day, in-person working and collaboration sessions. It invited site managers to attend these sessions and work side-by-side with the team. Many did. Breakfasts and lunches were catered so that the team was available throughout the day and site managers could stop by, work with the team, and enjoy a meal.

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TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• SharePoint Online
Bug Tracking / Quality Assurance	• Jira
Design Tools	• Axure • Photoshop • Illustrator • Sketch
Site Building Tools	• SharePoint Framework (SPFx) • React
Content Management Tools	• SharePoint Online
Search	• SharePoint Online
Other Functions	• Optimal Workshop for card sorting and tree testing • Jira for work management • Microsoft Teams for collaboration

MOBILE

Designing for the Future

All pages on The Portal use the custom web parts, which have responsive design. Although mobile devices are not yet more prevalent than desktops/laptops at Duke Energy, the shift is coming. The team therefore felt that it was best to build for the future, especially since using a cloud-based platform would mean that large scale redesign projects should become a thing of the past. Also, waiting to implement a comprehensive mobile design might put The Portal at risk of becoming unable to keep up with rapidly changing technologies.

Because many workers are in power generation facilities or work from trucks in field locations, the need for mobile-friendly tools and devices is clear. In the last few years, approximately 4,000 field workers have been issued company Windows 10 tablets. The company also offers incentives for employees to enroll their mobile devices in the PMD program, which gives them access to a secure browser and their corporate email, contacts, and calendar. Employees are also encouraged to participate in the Bring Your Own PC (BYOPC) program, which gives their PCs a virtual desktop and the same level of network access as those using company-owned computers.

The Long Road Toward a Ubiquitous Mobile Environment

Although The Portal links to applications—such as the Expense Management system—that are beginning to offer mobile-friendly designs, the team acknowledges that it may take years before Duke Energy has a comprehensive and ubiquitous digital workplace that is mobile friendly. Currently, The Portal design does not indicate which applications are mobile-enabled or hide those that are not when users access the intranet on mobile devices. The team thought that offering such indications might frustrate mobile device users, who expect to find the same links consistently regardless of the device used. Also, while tools may not be optimized for mobile devices, they may still be usable. A third and equally valid reason for allowing mobile users access to the full suite of applications is strategic: The team hopes that, by providing links to all applications on mobile devices, user feedback will encourage application owners to improve their mobile experience. The Portal can also help provide quantitative data about mobile access that will help owners secure funding for enhancements. Otherwise, application owners might have a misperception that there is no demand for mobile usage, when employees simply aren't attempting it because they have no access to the applications.

ROI

The team has not yet been able to implement a metrics tool on the new portal. In the past, the Product Owner wrote quarterly and annual detailed metrics reports that described trends, number of users, and other insights into user behavior, including time-of-day peaks and month-to-month usage patterns. This will resume in the future, when a tool is available.

With the launch, the project was considered successful in several ways. User feedback was mostly positive, with only a few users unhappy about change. A War Room that was set up in anticipation of possible issues with the launch was discontinued several days early because things were running smoothly. Help Desk tickets about portal issues were minimal.

LESSONS LEARNED AND BEST PRACTICES

Duke Energy's Portal Product Owner, Martha Brown, explains some of the key lessons learned from the latest redesign project, followed by Brown and other team members describing some of the best practices that also emerged.

Lessons Learned

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- **Adapt Agile in a way that works for the team.** "When the project began, Agile was new for the team. It was a dramatic change from old ways of working. It can take time to internalize Agile and understand how it should work before you feel confident in making any changes so that it works comfortably for your team's specific needs. For example, the team began to treat stories as placeholders for conversations rather than attempting to capture all the details in them or use prescribed language in them that felt unnatural and unhelpful. The team also accepted that design work needed its own sprint(s), even though it didn't result in working software. This altered our 'definition of done.' Once the team reached that comfort level, work began in earnest and productivity increased quickly. More was accomplished in less time using Agile than could have ever been imagined before."
- **Foster partnerships with other projects.** "No one would recommend launching a new intranet at the same time HR systems are moving to a new vendor and the company is rolling out O365 and starting the move to the cloud. Not only does this create a lot of change at one time for employees, but it also spreads resources thin and creates instability in the digital landscape. Since the team found itself in this situation, it managed through by keeping communications open with other teams, getting sponsorship involvement to identify dependencies and coordinate milestones across projects, and asking lots of questions to keep informed about potential impacts."
- **Raise the white flag early.** "With lots of experience working in SharePoint (although an old version), the team was a bit surprised by the complexity of doing custom development in SharePoint Framework and by the changes involved in moving to the Cloud. We struggled along for several months before acknowledging that it was time to bring in external resources with SharePoint expertise. Fortunately, Cardinal Solutions was able to send in reinforcements and get the project on track."
- **Don't overlook long-term planning.** "There may be many ways to address long-term planning with Agile teams, but in the beginning, the team was focused on working sprint-to-sprint, in two-week increments, and was struggling with how to predict where we would be when our deadline came around. Fortunately, our sponsors had the foresight to bring in a project manager who handled the budget and did forecasting of resource needs. This helped us to anticipate that we needed more people on the Content Team and to get them on-boarded in time to make a positive impact."

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- **Thinking "mobile" requires some training.** "Designing for a mobile experience is a big change from the old days of dense pages with multiple columns and lots of links. It's a change that snuck up on anyone not paying careful attention, which was nearly everyone except for the Design Team. When the designs were built and ready for use by the Content Team, a little bit of chaos ensued, as it was unclear how the web parts were to be used. The vision and intent of the design was not being interpreted with accuracy. The Design Team stepped in and began creating wire frames of pages until the Content Team become more comfortable with using the designs. This prototyping ensured that sites were built with consistency and that web parts were well suited to the content."

Best Practices

- **Use in-house design talent.** "The Portal design was created by Duke Energy's in-house design team. Whereas many design firms can do great work, there's an intrinsic awareness of employees, the company culture, and the ways people work that gives in-house designers an edge. Not only is the edge aesthetic, in-house designers are also aware of unique technology challenges and constraints that may impact designs, and they know the right questions to ask and where to find the answers. In-house teams are better positioned to create and maintain consistency in the brand, as changes in the intranet design may benefit the design of other web channels, or vice versa, and lessons learned through usability studies and user feedback may benefit everyone. While teams can supplement with external design expertise, it's best to use in-house talent to direct designs when possible." (Brown)
- **Use card sorting and tree testing to design IA.** "Open card-sorting exercises, in which users were asked to create their own groupings of topics, were very eye opening for the team. Users had a wide range of mental models of how information should be structured, and seeing these models challenged long-standing assumptions. They also revealed the diversity of perspectives within the company and the complexity inherent in attempting to find a common vocabulary. Besides all that, it was just fun to see how people think. Using the results to create different navigation prototypes that were then tree tested with users enabled the team to make the decisions based on data rather than personal preferences." (Brown)
- **Keep your executives close.** "Throughout the project, the executive sponsors were given several demos of work in progress and were made aware of impediments and risks that were unresolved. Before Agile, executives might have been shielded from the imperfections of unfinished work. Showing executives what was happening and offering them transparency into the workings of the team helped them support and advocate for the project more effectively and gave everyone the sense that both accomplishments and challenges would be faced together." (Brown)

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- **Mind the care and feeding of the team.** "The team was spread over several cities, so getting everyone together took planning. Throughout the project, the team agreed that assembling in a room from time to time helped push through points of feeling stuck and confused, inspired creativity, strengthened collaboration, built relationships, and made things more fun.... Over the last few months of the project, the team assembled weekly and invited site managers to join for food, assistance, and collaboration. The tensions were high, with multiple projects dealing with dependencies and nonnegotiable deadlines, so these sessions were instrumental in creating partnerships and equipping people to be successful." (Brown)
- **Find a cadence for design.** "One of the signature qualities of Agile is that it has a cadence. Everything occurs systemically on a regular cycle: reviews, retros, and planning every two weeks; stand-ups every day; repeat. Design needs to find ways to get in synch with that cadence. One of the really effective techniques we used during the project were recurring Design Workshops. Twice a week, the designers and devs would meet for an hour to discuss any pressing issues. Sometimes we would look ahead and discuss upcoming stories or review work in progress, or designers would answer questions from devs about a particular detail that wasn't in the design. If there was nothing to talk about, we cut it short or cancelled. This was not intended to curtail direct collaboration, but it saves a lot of random emails and ad hoc meetings. We're continuing to do that still but we've slowed the cadence down to once a week." (James Bowen, UX Team Manager)
- **Give design some breathing room—sometimes.** "One of the other challenges with being a designer in an Agile world is the nature of design work. Designers are often asked to envision something from nothing, to take a problem and come up with a creative solution. How long does it take you to come up with a creative solution? The answer is, it depends. Some types of design can be estimated pretty well—let's say you're producing a new variant in a well-defined design system—but a lot of design and the research that goes into design does not fit well into predefined time boxes, especially if that design needs to flow directly into working software during the same sprint. Sometimes the pressure is good and brings out inspiration but it can also force you to just get it done and churn out mediocrity. And once that mediocrity starts to scale, you are on your way to a very bad place." (Capricia Townes, Lead UI Designer)

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- **Study the old to create the new.** “Designers often start with a blank page. But, redesign projects offer a treasure trove of valuable insights for designers. Analyzing the old intranet content led to big wins in efficiency and usability improvements. The team evaluated the site content, focusing on several key web parts and pages, as well as those that offered unique design challenges. This helped the team identify web parts to support existing and future content needs, to design prototypes and templates using real content, and to prioritize work around the types of content most frequently used. So, designers should love the content. Embrace it. Analyze it. And allow it to propel them to create digital solutions that present content in a visually-appealing, user-friendly manner.” (Townes)

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European Bank for Reconstruction and Development (EBRD)

OVERVIEW

COMPANY

The European Bank for Reconstruction and Development (EBRD) was established to help build a new post-Cold-War era in Central and Eastern Europe. It has since played a historic role and gained unique expertise in fostering change in the region and beyond. The EBRD is committed to furthering progress toward market-oriented economies and the promotion of private and entrepreneurial initiative. This has been its guiding principle since its creation in the early 1990s; with new challenges and the welcoming of new countries to the EBRD world notwithstanding, it will continue to be its mission in the years to come.

Headquarters: London, UK

Company locations: Offices in 38 countries focused on North Africa, Europe, and Central Asia—from Morocco in the west to Mongolia in the east.

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

Annual revenue: As a multilateral development bank, the key metric is investment level rather than profit. In 2017, EBRD invested 9.7 billion Euros.

THE INTRANET

Users: Approximately 3,500 people use the intranet, with approximately 70% of them based at HQ and the rest in multiple locations. Outside of London, the biggest offices are in Kiev, Cairo, and Istanbul, and they have up to 100 staff members each.

Staff uses the intranet to get news from around the organization, find information related to working at EBRD, and access third-party applications for self-service HR tasks, log IT requests, run procurement efforts, and much more.

Users roles include:

Front-line banking staff: Front-line staff who work on project finance use the intranet to access banking applications, track project statuses, and generally stay abreast of what EBRD is doing.

Economists and analysts: For these workers, the intranet is a source of knowledge sharing, providing access to regional news and data.

Administrative and support staff: These staff members do practical tasks, such as booking travel, organizing events, and finding meeting rooms.

Communications teams and departmental coordinators: These staffers use the intranet to share their work internally and inform staff about announcements and plans.

Mobile approach: Responsive web design

Technology platform: Oracle WebCenter Sites

TEAM

Communications team (internal): The EBRD Communications Department's project team consisted of two existing staff members.

Design team (external): Manifesto Digital supplied five design and UX staff, plus a project manager.

Leadership: James Bregman, Principal Manager, Digital Development (Communications); Andy Dean, Project Manager.

UX and design/creative services (Manifesto Digital): Richard Williams, Principal Design Consultant; Adi Harari, UX Consultant; Mark Ellis, Creative Director; Yasmin El-Amery, Designer.

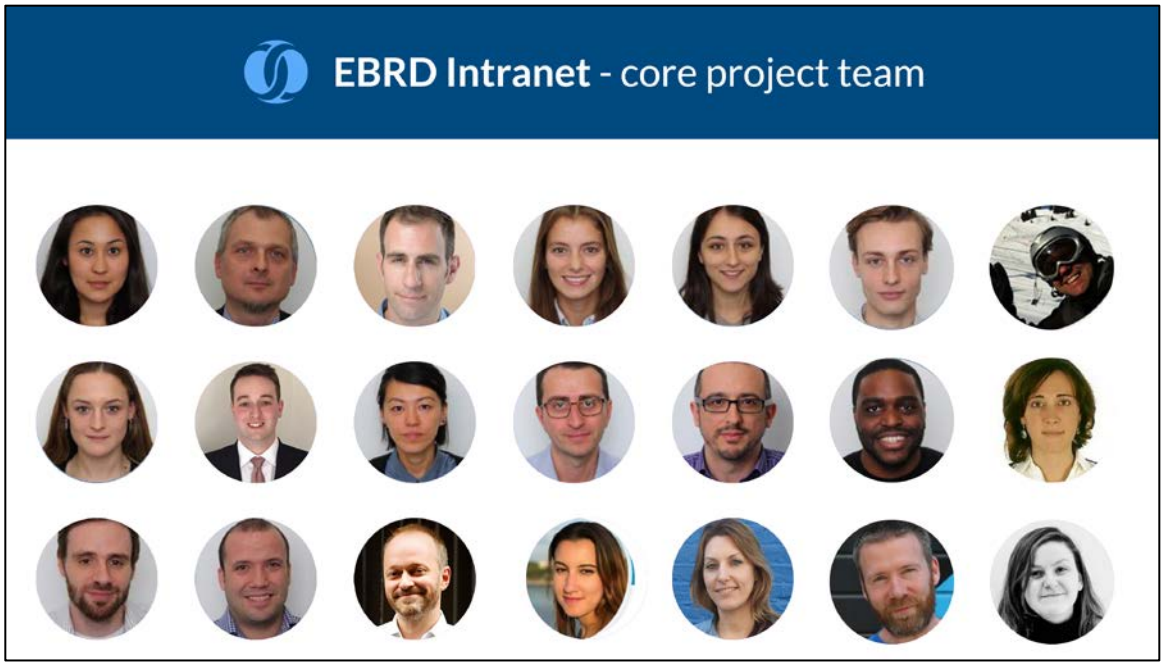
Development (internal): Bojan Vukasinovic, Development Lead/WebCenter Sites developer, with support from various EBRD IT staff, including ad hoc testers, Unix managers, etc.

Development (VASS IT): Gerardo Rodriguez, Delivery Manager; Nathan Nelson, Front-end Developer; Pedro Guttierez, WebCenter Sites Developer; Racan Osman, WebCenter Sites Developer; Noelia Alonso, Scrum Master.

Communications: Yuki Kijima, Marketing Designer; Robert Dillon, Tester and Production Temp; Dylan Bell, Intern and general all-round support; Nicole Minkova, Intern; Benedetta Maisano, Intern; Rebecca Carden, Change Management Adviser; Nigina Mirbabaeva, Digital Officer; Rosanna Vellacott, Content Coordinator (taking over from Cecilia Calatrava).

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INTRANET TEAM



Team members shown here (top row, left to right—EBRD): Nigina Mirbabaeva, Bojan Vukasinovic, James Bregman, Benedetta Maisano, Nicole Minkova, Dylan Bell, Andy Dean; (middle row, left to right—EBRD): Rosanna Vellacott, Robert Dillon, Yuki Kijima, Luigi Zoso; (VASS IT): Pedro Gutierrez, Nathan Nelson, Noelia Alonso; (bottom row, left to right—VASS IT): Racan Osman, Gerardo Rodriguez; (Manifesto Digital): Rich Williams, Yasmin El-Amery, Emilie Vaillant, Mark Ellis, Adi Harari.

HIGHLIGHTS ABOUT THIS WINNER

Research, cultivating relationships, and good design sense are just a few of the traits that helped this team create a winning intranet design. EBRD intranet team members attribute much of their success to a beta period, during which they collected invaluable data about their designs—which they were able and willing to change in order to improve them. They worked closely with the head of Corporate Communications to turn the content model on its head and create a more open and distributed way of adding news, collaborative spaces, and comments on the intranet. Further, a new editorial tone and purpose focuses on having senior staff share more content with employees—and align that content with the new intranet's more open and unifying tone. Employees have warmly accepted these changes and have both generated and consumed intranet content at previously unheard of levels.

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- **News written by all employees:** Any employee at EBRD can write news. This is a great way to: 1) generate a large quantity of news on a wide variety of topics, 2) include all employees, and 3) reduce the pressure on the Corporate Communications team to sniff out a variety of interesting new stories. And, while the Corporate Communications team continues to edit the homepage, other employees individually produce much of the material showcased there. A successful mark of the intranet's new, decentralized content model is that the Corporate Communications team is now perceived as a content facilitator and coordinator rather than a content owner, which lessens legacy perceptions of the intranet as a top-down, management-biased news source. Employees are the owners, which is special and different.
- **Applications list:** A page listing many applications is accessible through a link on the homepage, and users can also choose their six favorite application links to appear on the homepage itself. This makes using their most important apps a cinch.
- **Visual:** The site's consistent color palette includes light blue accent areas and backgrounds, light blue text for links, black for normal text, larger light blue text for headings, dark blue buttons for common buttons (such as for bookmarking pages), light blue buttons for demoted actions, yellow call-to-action buttons, and yellow and blue for highlighting selected navigational elements. The consistent use of color and style not only makes pages good looking, it helps create hierarchy on pages and helps users easily understand which items are clickable.
- **Social:** A Twitter account of the user's choosing (or the default, @ebrd) shows the three latest tweets on the homepage. Comment and like modules are positioned within most content items and are heavily used.
- **Personalization and customization:** The intranet tracks the content users create, along with their selected apps, selected Twitter handle to follow, bookmarks, and various other personalized information. These options help declutter the intranet and serve the best information to each user.
- **Promoted content:** A select few areas are reserved for internal advertisements; these promote interesting content or ongoing campaigns.
- **Events:** The detailed events calendar helps employees easily stay abreast of EBRD happenings.
- **Footer with help and support:** Employees can easily get help for the intranet, HR, IT, and other commonly needed areas. It's also easy to contact people in any other department for support. These offerings help prevent employees from wasting time trying to resolve unresolvable issues on their own.

- **Daily email:** The *Your ERB Today* email newsletter is sent out once a day by Internal Communications and is meant to replace many of the emails sent by various departments. The intranet team facilitated this by creating a system that pulls content directly from the CMS into an email template, making it easy to compile a variety of the day's top news items. The newsletter is an at-a-glance digest that leads staff to click into the intranet to read more. It also removes the need for multiple daily all-staff emails by consolidating key information into a single reference point.
- **Spaces:** Any employee can easily set up and share mini-collaboration tools called *Spaces*. These *Spaces* are easily findable via site search, and the *Spaces* that users are members of are saved on their profile pages. *Spaces* were created to be generic enough to be used for any work project or for running a social activity, and they make it easy for people across time zones to collaborate. In addition to members, the *Spaces* include rich components such as discussions, schedules, and documents. The *Spaces* UI is also consistent with the rest of the intranet. *Spaces* are very popular, and teams continue to request new features, which the intranet team then researches and implements.
- **Calendar:** A calendar is not just a work schedule at EBRD. Rather, the corporate calendar keeps employees involved in and informed about the thousands of events that the bank is involved in—sponsoring, hosting, and organizing—throughout the year.
- **Search:** The search includes all intranet content, including collaborative spaces. The UI offers predictive search (suggestions) and displays search results on the page as the user types, making search fast and easy. For employees who want to refine results, tabs and filters lead them forward. The *suggested keyword tags* feature is an added nicety.
- **Group sections:** Departments, regional offices, and countries each have an intranet section. Those sections communicate what they do and how they can help coworkers, and provide key contact information and more. These group sections make the large company seem a little smaller and make even far-apart workers seem a little closer.
- **Templates:** The project team thoroughly investigated and iterated template designs for many sections—including regional offices, countries, departments, and collaborative spaces—to ensure that the new platform would house all content, which was coordinated in parallel. In the template, content automatically fits in with the global navigation and site search. Within these templates, methodically researched and designed page layouts make content easy for users to digest.

BACKGROUND

The EBRD's existing intranet was ancient and in a state of disrepair. Indeed, one veteran staff member claimed that the intranet was approximately 18 years old,

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which seemed impossible to believe; after some internal digging, however, it was revealed to be true. Aside from some minor facelifts to key pages in recent years, the organization's legacy intranet was almost as old as some of the staff members.

EBRD staff consistently regarded the visual design as embarrassingly outdated, functionality as limited, content authoring as slow, and the platform as constantly crashing. It was awash with terrible UX and had a baffling and messy content structure. And it was totally inaccessible on mobile.

In addition to its crumbling front end, the intranet was also hugely labor-intensive to use at even a basic level on the back end, and the CMS was outdated, user-unfriendly, and poorly configured.

Everyone agreed it was time for a new intranet, yet it was not any one of these obvious failings that finally proved to be the lynchpin that pushed the project forward. It was failing technology that finally opened the budget floodgates. The CMS that powered the old intranet had reached its end-of-life status and had to be replaced or the bank would be stuck with a dead intranet that couldn't be updated.

Goals

The top-level design goals were fairly straightforward, as an abundance of staff input had been offered by the time the project kicked off. People were calling for an intranet that would be simple, usable, and navigable. They also wanted a robust search engine and some personalization and interactivity. Those pillars became the project focus and from them the team developed a functional specification that contained approximately 20 core requirements. These requirements became the project must-haves; the remaining items were added to a backlog roadmap for consideration during further development activities post-launch.

The core requirements for the new intranet included:

- **Implement a new CMS:** Oracle WebCenter Sites had been implemented in-house a couple of years earlier to power external facing websites. Because it had been a big success, it was a no brainer to build a new intranet from scratch and use WebCenter Sites to do it.

  On the legacy intranet, publishing was so painful and prone to collapse that content output was at a lower level than anyone would like; output was also geared toward a newspaper-style once-weekly release of new content. This approach put a Band-Aid on a failing system and kept it from completely failing, but it was not practical or modern. The correlations between the CMS's quality and the intranet's limitations were easy to see. Provisioning a new CMS was a central project goal, and the aim was not just to use a new CMS, but also to implement it as a leading-edge content-authoring platform that was as streamlined and user-friendly as possible.

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User testing of front-end UX and design was extensive and central to the project. Considerable time was also spent working with content managers on back-end elements during development to ensure that templates and publishing processes were intuitive, reflected their needs, and minimized the number of clicks or stages in required for any given production task.

- **Make the intranet social and inclusive:** Another goal was to create an intranet that was not merely a one-directional news channel from management to staff, but an interactive, social platform in which all EBRD employees could communicate and collaborate. This would constitute a sea change: At EBRD, openness in internal communication and direct access to publishing were very new ideas.

  Enacting this cultural shift became a primary consideration in the change management plans. The old intranet was thoroughly one-directional—a news source that management could use to inform staff. There was no interaction or sense of inclusivity, and that had to change completely for the project to succeed.

  Further, the team determined that the new intranet needed to be perceived as a tool intended for the organization as a whole. That is, it had to stretch across many user types and a huge geographical region, rather than be focus only on the needs of a subset of corporate staff at the London headquarters.

- **Make it great, not merely good:** Any new web platform should incorporate standard, modern design conventions and responsive behaviors. However, because the long-neglected legacy intranet had inflicted such a bad UX upon staff, the project team felt compelled to go the extra mile and obsess over the UX and visual design. Throughout the design process, team members repeatedly consulted with staff members to ensure that they found the new platform easy to use. There was a feeling that having an okay design wasn't going to be enough; the team had to produce a truly outstanding, modern intranet to win people over.

- **Create a culture of continuous improvement:** The team also intended to introduce the new intranet as a starting point, rather than a finished product. This meant the team had to set the stage for a long-term roadmap that could be accommodated, both from a practical and a political perspective.

  Taking an Agile approach to the project went a long way toward achieving this goal. Getting in-house stakeholders familiar with the cycles of continuous improvement that were used during the project set the stage for those that would be used post-launch. Whenever templates or features were developed, the team made a conscious effort to ask how they could be extended in the future and to avoid too much interdependence between different parts of the platform that might turn out to be constrictive later.

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- **Decentralize publishing:** Another artifact of the old system was that the publishing process was so challenging and unwieldy that even staff members who had access struggled to use it. The bulk of publishing was therefore funneled through one webmaster in the Communications Department. This system was inefficient and impractical, and put limits on the amount and quality of content that could be published. For the new intranet, the target model was to decentralize almost all publishing by empowering some 80 staff members across business teams to publish and manage content directly. Even within the Communications Department, which owned the intranet, the goal was to empower numerous staff members to publish easily themselves, rather than create a dependency on a few staff members. The team felt this emphasis on decentralization would make a big difference and improve the quality and quantity of information available on the new intranet.
- **Save everyone time:** One of the primary business drivers behind the intranet project was the possibility of significant gains in user efficiency. The old intranet's search engine was basically unusable. It had not indexed new content for several years, and the existing indexing was poor; as a result, finding information generally took a very long time or ended in failure and frustration. The new site's search engine had to be modern, fast, and fit-for-purpose, and the site needed an improved IA to further facilitate speed.

  The team knew that the new intranet would be judged on how well, clearly, and quickly it made information available. The time saved in basic information-seeking tasks could be extrapolated to enable huge time-savings—and therefore cost-savings—across the organization.

Challenges

The challenges the team faced included the following:

- **Timeline:** While few design teams enjoy the luxury of a leisurely timeline, the EBRD team's timeline was particularly challenging. IT stakeholders wanted the entire project wrapped up within one year of starting. Further, HR required that the intranet's first iteration be live in just three months, so that it could support a critical new staff information initiative that was scheduled to launch. Even though that first intranet release could be a basic version with limited features, the timeline still alarmed some team members and governed the way the team had to approach certain processes. Perhaps most critically, the timeline put a noticeable squeeze on the design and UX period, which was compressed as a result.
- **Staffing:** The languishing state of the old intranet justified a scant ongoing staffing investment. On the legacy site, just one part-time "webmaster" kept the intranet running so that Internal Communications staff could publish a few content items per week and departments could keep their areas updated at an absolute minimum level.

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In this environment, there was no notion of product management, design development, roadmaps, or anything else. So, starting without a team was a logistical challenge—but it also turned out to be a project upside. The staffing vacuum provided an opportunity to go out and find the best possible group to work on the project from scratch.

- **Overcoming caution, cynicism, and risk concerns:** Although there had been plenty of feedback calling for interactivity, social features, and a much more inclusive and collaborative intranet, many employees were also concerned (or perhaps cynical) about the likely success of these features, even though they themselves fully supported them. Cultural challenges such as these are founded on justifiable fears and are therefore hard to overcome. For example, one worry was that the organization would build a "social intranet" with opportunities for staff interaction and it would go unused, making the new platform look empty and ridiculous. Another worry was that staff members couldn't be trusted with the "dangerous new weapon" of self-publishing.

  Weighing heavily on these cultural concerns was the fact that several years earlier, an attempt to introduce intranet message boards and chat rooms had been a bit of train wreck, from both an editorial and technical perspective. So, another attempt to introduce user-generated content had to be approached keeping in mind lessons learned from the previous, disappointing attempt.

  Team members took a proactive approach to quelling these justifiable fears: From the start of the project, they engaged in discussions with an array of stakeholders, including members from IT, risk management, and communications. Contingency planning was deemed an effective way to settle many things. That is, for every possible "what if" scenario, the team formed a mitigation plan. Such scenarios included: *What if someone publishes inappropriate content? What if the new collaboration functionality is used to share a sensitive document?*

  When staff members saw prototypes of prospective social interactions in early user research sessions, a common response was, "I'd love to use this kind of thing, but I'd worry about my manager thinking I had too much time on my hands." Working to overcome this concern became another project goal: Design social features that are clearly an element of core, work-related intranet functionality, and not a frivolous add-on for the sake of it.

- **Testing personalization:** Time and resource constraints meant that the CMS couldn't be configured to simulate, during testing, how the new intranet would look to a particular user. However, the team decided very early on that the new intranet would have this type of role-based personalization. It was therefore with considerable trepidation that team members committed to developing a personalized intranet without being able to truly test that personalization functionality in advance. They did however, put measures in place to mitigate this process shortcoming. For example, the development team conducted a general load-testing simulation and, while they were confident it would work, it remained a point of concern until the launch was successful and staff (thankfully) found a successfully authenticated and personalized intranet experience.



Image 97. EBRD Previous Intranet Navigation and Header. The previous intranet had several menu options, which led to landing pages with subnavigation. It was illogical, unintuitive, and repetitive. Some headings were reused as subheadings, and the journey between sections was convoluted. As a result, when using search, employees had to use a different field to find people or content pages, and each choice ran a different—and equally dysfunctional—search process. *97_EBRD_01_old_intranet_nav_header.png*

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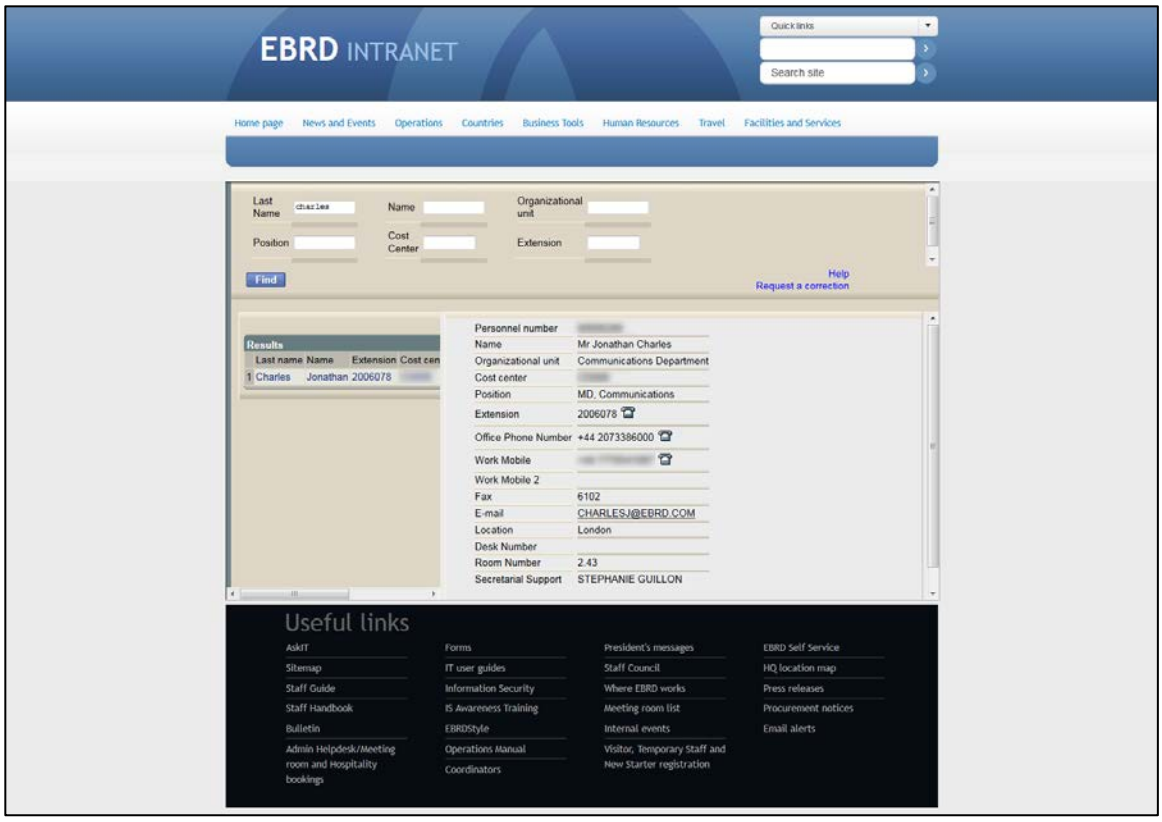
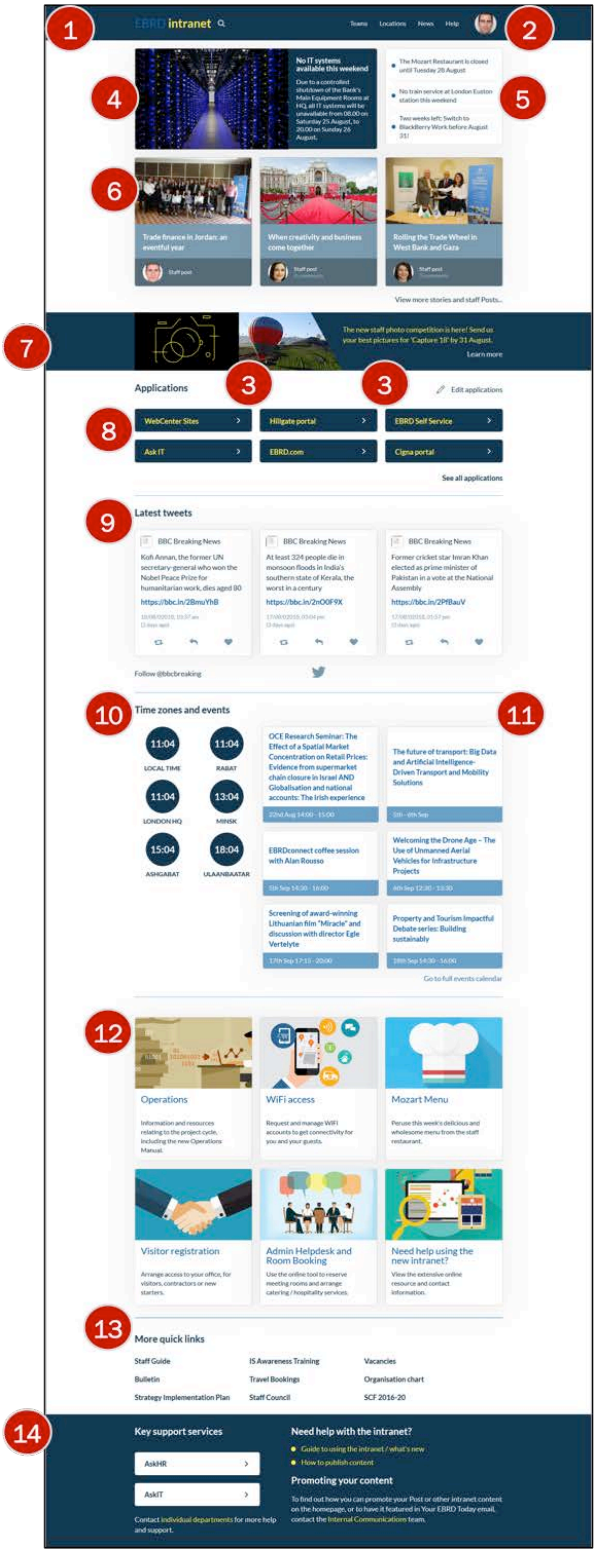


Image 98. EBRD Previous Intranet Staff Profile. On the previous intranet, staff profiles were automatic, very basic, and could be searched based only on user name. *98_EBRD_02_old_intranet_staff_profile.png*

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Homepage

Image 99. EBRD Intranet Homepage. The new EBRD homepage includes news, apps, events, help, announcements, and more. *99_EBRD_03_homepage.png*

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Homepage, Highlights

The homepage's visual design is pleasing and resembles the design of the bank's public-facing website, giving employees some brand consistency. News (produced by employees), announcements, and other promotions keep EBRD employees informed.

1. **Logo and global navigation:** A thick dark blue bar at the top delineates the intranet logo, search icon, and global navigation menu. The heavy visual treatment anchors these always-present, vital items. User research helped the team select the top-level navigation options: *Teams*, *Locations* (leading to overseas office information), *News*, and *Help* (which covers both using the intranet itself and getting help from key departments, such as the IT service desk).
2. **Logged-in user photo:** The photo indicates that the user is logged in. Clicking their photo leads users to a menu of their personal and customized information, including links to their selected top-six applications, an aggregated set of their published content, and access to various other personalization settings.
3. **Grid:** The three-column layout and vertical grid gives the page balance and is a pleasure to gaze upon.
4. **News:** An important recent news item created by Corporate Communications appears at the top of the homepage. An image related to the news captures attention and appears with the headline and title.
5. **Announcements:** To the right of the main news item is a space reserved for three announcements. Urgent or unplanned announcements typically go in this area. The white background for this section shows well on the grey page background, and the blue text juxtaposed against the white background makes this section highly visible yet not distracting. Because it's important that people see these entries, this is a well-suited look.
6. **News by employees:** Anyone can write news on the intranet. This choice makes it easy for employees to share information, generate helpful news, and create a feeling of inclusiveness. News items written by employees outside the formal Corporate Communications team are called "staff posts." Three recent items appear just below the main news item and announcements. The *View More Stories* and *Staff Posts* link leads to a page of news items.
7. **Promoted content:** A wide, short section below the news is reserved for non-urgent information, initiatives with broad appeal, and ongoing campaigns.
8. **Applications:** It's easy for users to locate the apps they use most, or that are most important to them. Buttons to six apps appear below the promotion section (the team's considerable user research found that six was the right number of applications to provide quick access to). The button's size makes their presence obvious. Employees choose which applications they want to appear in their button set on

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the homepage using the *Edit Applications* link that appears just above the buttons. Positioning edit capabilities in the upper right is standard and makes it easy for employees to change their set of apps. While app selection can be edited in-page, some users find it more intuitive to refine that selection in the context of overall homepage customization management. So, a separate UI for reordering homepage elements also lets users manage their six preferred apps. Prior to users customizing these buttons, a default set appears based on various factors, including metrics of the most used apps, importance, newness, and apps with potential relevance for many staff members that aren't currently well known. In some cases, a new application is put into the default six temporarily to give it an initial push, before moving it further down the list. Below the buttons, a *See All Applications* link takes users to a page of approximately 50 apps that they can choose from; links to new apps are regularly added to this page, and old ones are regularly retired.

9. **Twitter**: Employees can choose which Twitter account they want to see, and that account's three latest tweets appear on their homepage. If the user doesn't change the source, the tweets come from @ebrd, EBRD's Twitter handle. Each tweet displays the source name, the tweet and a link, its date and time, and share and like icons. Users can thus act on the tweets right from the EBRD intranet homepage. This module began life as a highly customizable news module to give staff external news at a glance from multiple sources. However, the designers eventually decided that a simple Twitter feature covered all options (as all news sources are on Twitter) and it would be a far less complex concept to implement and use.
10. **Time zones:** Because EBRD staff work across dozens of countries and several time zones, the intranet displays a set of time zones from locations across the areas in which EBRD works. The local time appears first in the set of circles, followed by the five other time zones.
11. **Events:** Six upcoming events appear in boxes to the right of the time zone circles. The event title, which is also a link to more details, appears first, followed by the date and time. This feature makes it more likely that employees will know about events and attend the ones they are required to or interested in. The *Go to Full Events* calendar leads to the list of all upcoming events.
12. **Promoted tools and facilities:** The page's final large section is used to promote six popular tools and facilities, such as the *Mozart Menu* (the menu for the staff restaurant) and *Visitor Registration* to help people visiting the office.
13. **List of links:** The *More Quick Links* section gives employees one more opportunity on the homepage to find links to the content and tools they want.

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14. **Footer, help, and support:** The large footer at the bottom of the page offers support for HR, IT, and the intranet—the three the most commonly needed support areas. Each individual department link goes to the full list of all department pages. A contact is also clearly visible on each landing page, which helps employees find the right contact person. The footer, which appears at the bottom of every intranet page, is designed with the same dark blue background used for the global navigation at the top of pages. This makes for a polished visual design.

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Homepage, Edit

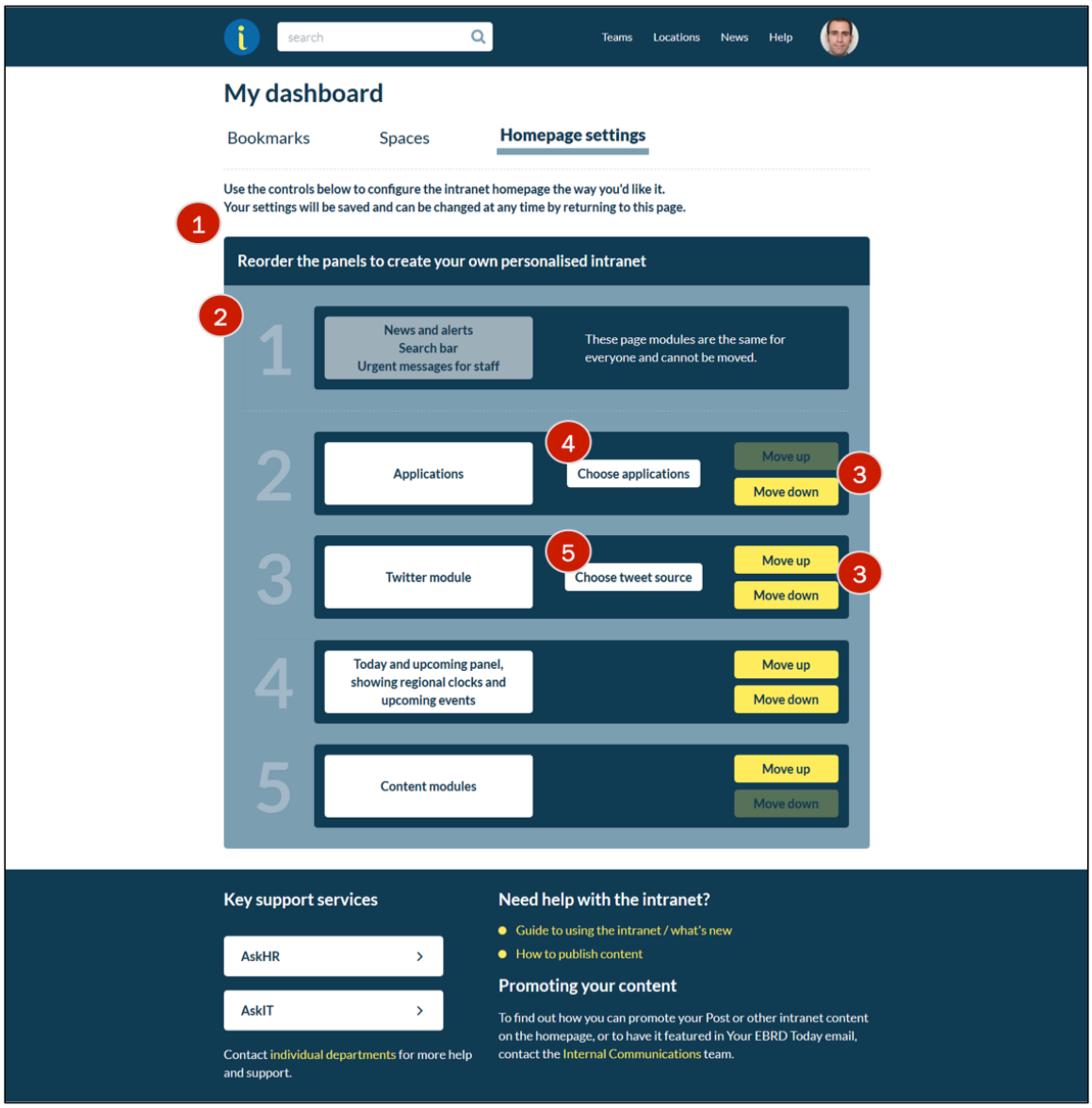


Image 100. EBRD Intranet Edit Homepage. Users can move sections of the homepage to suit their needs. *100_EBRD_04_manage_homepage.png*

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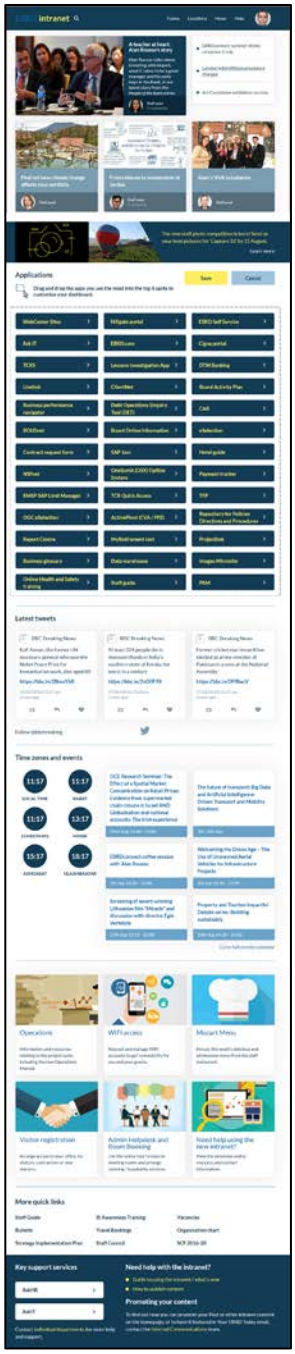
Homepage Edits, Highlights

Allowing users to reorder homepage sections helps make the intranet feel flexible and open. It also caters to the needs of the individuals that make up EBRD's diverse staff. Users access this editing dashboard through a personalized menu that appears when they click their image in the far upper right.

1. **Instructions:** Two short sentences explain how to use the page and what it's for. While many users won't need this, it's a nice example of the handholding that makes an intranet great.
2. **Order number:** Large numerals (1–5) appear in the left column of *My dashboard, Homepage settings* section. This indicates the vertical position of the item on the homepage.
3. **Move buttons:** The yellow *Move up* and *Move down* buttons appear with each section on the homepage, so users can easily change their order. *Move up* is greyed out for the top choice, since it cannot move any further up, and *Move down* is greyed out for the last choice. Users can also forgo the buttons and instead drag and drop the items to the desired position.
4. **Edit applications list:** In addition to editing their top six application buttons while on the homepage, users can edit them here using the white *Choose Application* button.
5. **Choose Twitter source:** The white *Choose Tweet Source* button lets users choose any Twitter feed they want to follow. The source's three most recent Tweets will appear on their homepage.

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Homepage, Edit Apps



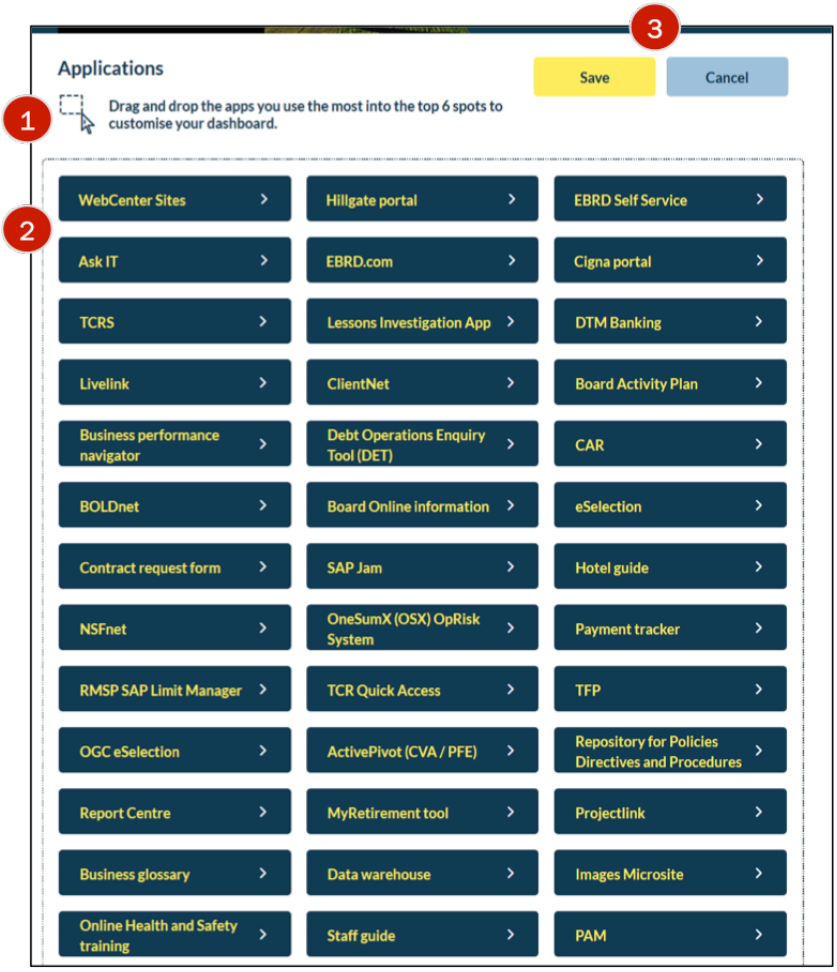


Image 101. EBRD Intranet Edit Homepage Apps. Users can drag their top six chosen apps into position. *101_EBRD_05_homepage_edit_apps.png*

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Homepage Edit Apps, Highlights

Users drag and drop their top six apps into position, so they will appear on their homepage.

1. **Instructions:** A clear sentence instructs users to drag and drop their top six applications to the beginning of the list.
2. **Apps:** Each app is represented with a large blue button that is easy to grab and drag with the cursor.
3. **Save or cancel:** Users can *Save* or *Cancel* the changes they made.

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Bookmarks

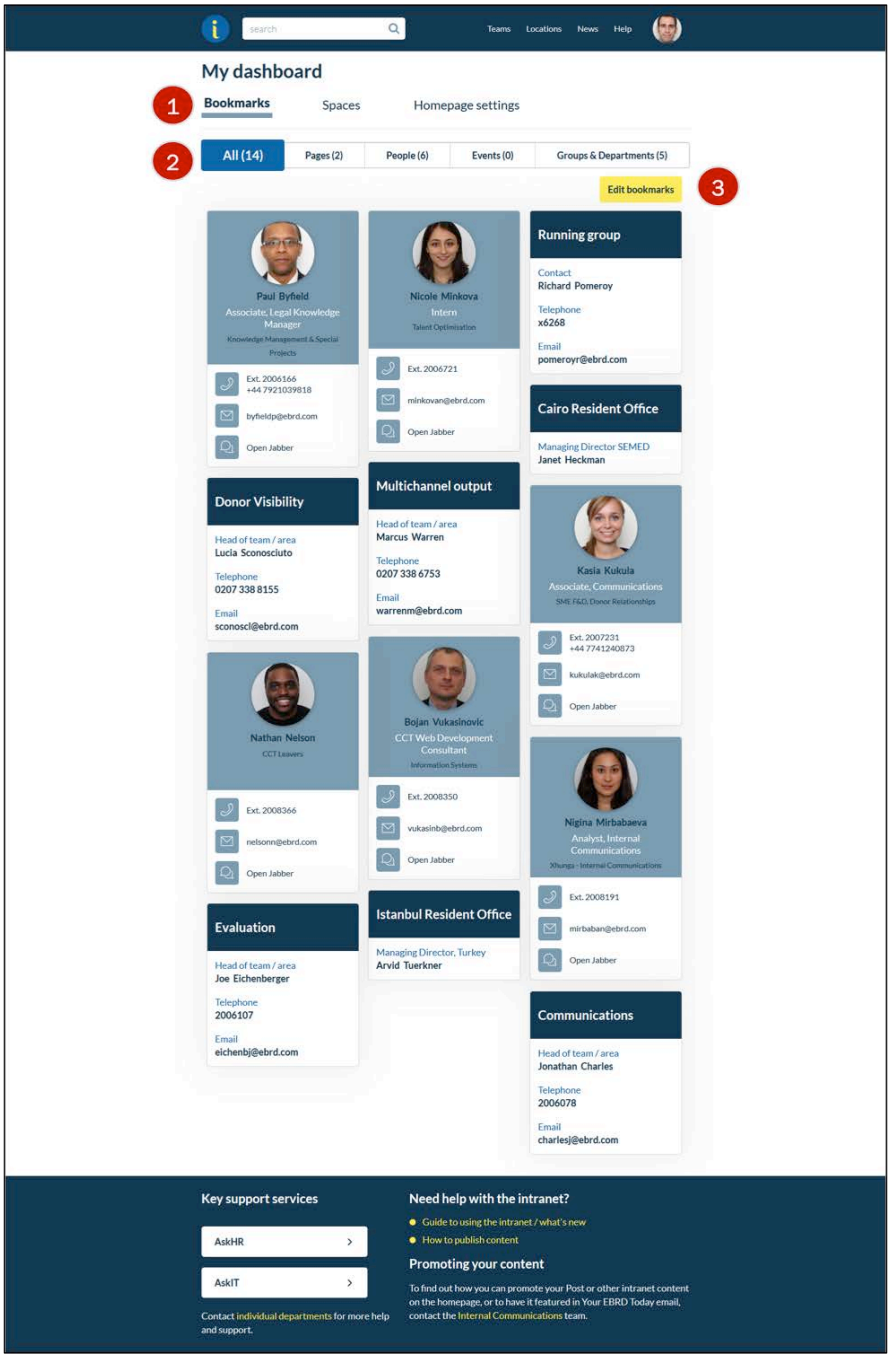


Image 102. EBRD Intranet *Bookmarks*. Users can access and edit their bookmarks on the *Bookmarks* tab of *My Dashboard*. *102_EBRD_06_dashboard_bookmarks.png*

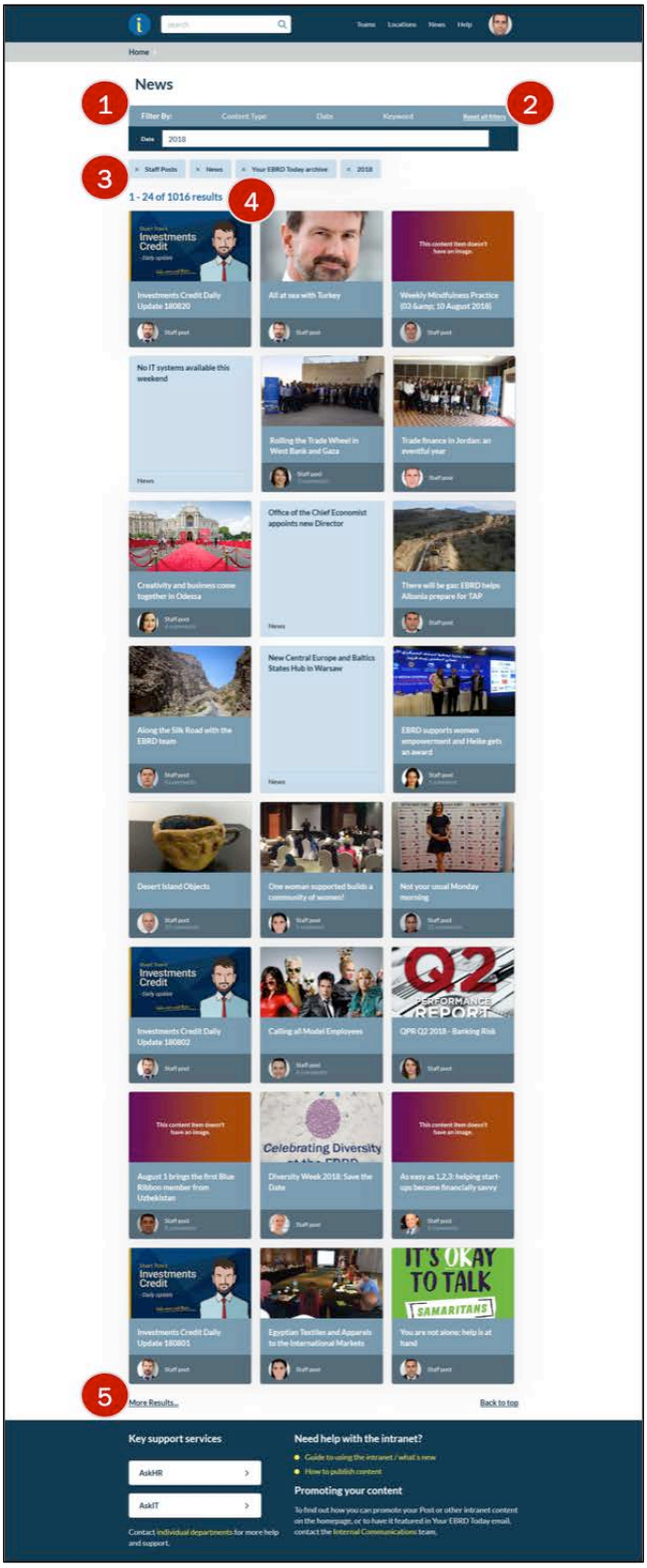
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Bookmarks, Highlights

All EBRD employees have their own *Bookmarks* page where, in a bold and visual UI, cards represent the pages they have bookmarked. Users create bookmarks via a dark blue *Bookmark page* button that appears in the upper right of most intranet pages. When a page is bookmarked, a yellow ribbon appears within the bookmark button in the upper right of pages. Clicking that button take them to their *Bookmarks* page where they can remove the bookmark if they want.

1. **Bookmarks:** The *Bookmarks* section of the *Dashboard* displays all the pages the user has bookmarked.
2. **Filter:** Employees can see their bookmarks by type—*Pages, People, Events,* and *Groups & Department*—by clicking one of the tabs at the top. A status number to the right of each item type displays how many of that type of page the user has bookmarked.
3. **Edit:** The yellow *Edit bookmarks* button in the upper right lets users change their bookmarks. The yellow button is bright, making it a good call-to-action visual juxtaposed against the blues and white on the page.

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News

Image 103. EBRD Intranet *News*. All news is consolidated on the *News* page. *103_EBRD_07_news_landing.png*

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News, Highlights

News, whether produced by Corporate Communications or any other ERDB employee, appears on the *News* page.

1. **Filters:** To find news they are interested in, employees can use the filters at the top of the *News* page. Among the available filters are *Content type* (such as *Staff Posts* by any employee and *News* by Corporate Communications), *Date,* and *Keywords*.
2. **Reset:** The *Reset all filters* link in the upper right makes it easy for users to remove all filters, see all the news, and start a fresh search. Alternatively, they can click the *x* icon that appears with each filter to remove them one at a time.
3. **Selected filters:** A common issue with faceted UIs is that users cannot see which ones are currently selected. That is not the case on this intranet. Here, users can easily discover and find the currently selected facets. Each word or set of words appears in a light blue button just above the news items. The large text makes the facets legible, and the blue buttons make them visible.
4. **Results:** If it wasn't already obvious to users that the page is displaying a subset of the news, the result label provides one more hint. Large blue text states, for example, *1-24 of 1016 results.* This clearly informs users that they are looking at a subset of the news.
5. **More:** The *More Results…* link at the bottom of the page displays the next set of results based on the current search.

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Employee Article (Post)

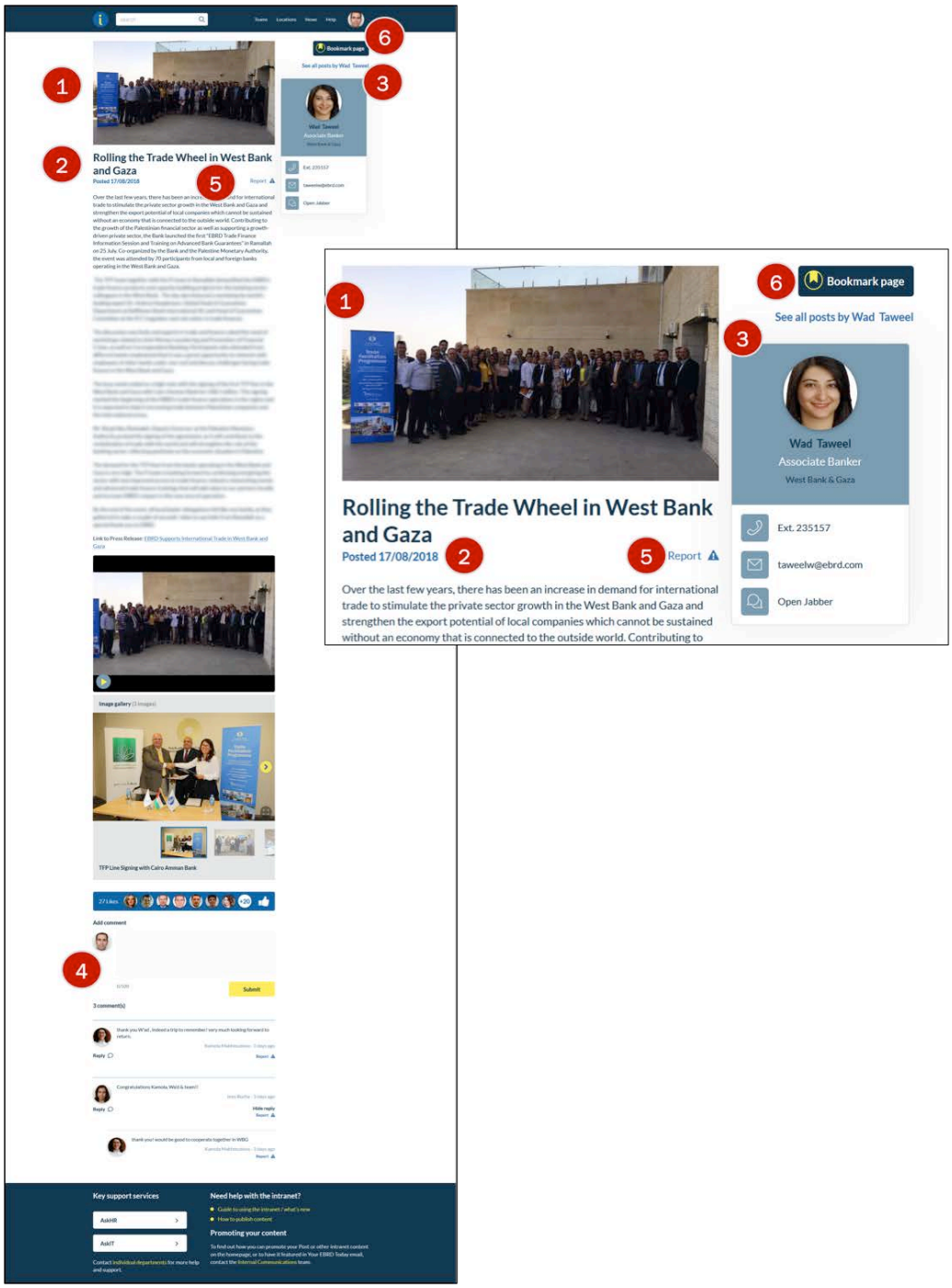


Image 104. EBRD Intranet Employee Article (Post). Posts are articles written by any employee who is not part of the Corporate Communications Department. *104_EBRD_08_staff_post.png*

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Employee Article (Post), Highlights

In a bold move to decentralize new content, all employees are encouraged to write articles for the ERDB intranet. Articles written by employees who do not work in Corporate Communications are called *posts*. There are typically dozens of new posts each week—far more than the Corporate Communications team alone could create. Also, because the team moved the article creation UI outside the CMS, staff in the many regional offices who don't have CMS access can to publish and comment on articles.

1. **Images:** If related photos or images are available for a post, one typically appears at the top of the article, with any additional photos or videos at the end.
2. **Title and date:** The article's title appears in large dark letters above the body text, with the posting date just below it.
3. **Author:** The article's author is listed in the upper right, along with the person's photo, job title, location, phone extension, and email address or instant message (via Cisco Jabber). Because any employee can post an article, it's especially important that coworkers can see the source and be able to communicate directly with that author. The *See all posts by [author]* link above the byline area lets employees further explore a particular author's thoughts and opinions. This can help forge a bond between people who have never met and extend an employee's contact network.
4. **Comments:** Coworkers can comment and reply to articles. Commenting remains a good option for employees to communicate with one another about work and internal processes and events. Commenting on an article is positive because it lets people discuss a topic and share their knowledge about what they just read. Many senior staff and even the EBRD president have used the like button or added comments to posts, which helps diminish any perceived taboos related to employees writing and/or commenting on articles.
5. **Report an issue:** ERDB's decentralized content model has been highly successful. Still, the team has safeguards in place in case any issues arise with a story's content. If readers find a problem with an article, they can easily report it to the intranet team via the *Report* link at the top. (So far, only one article was flagged as possibly breaking the house rules, but it ultimately turned out to be fine.)
6. **Bookmark:** Clicking the blue *Bookmark page* button in the upper right adds the article to the logged in user's list of bookmarks.

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Article, Mobile

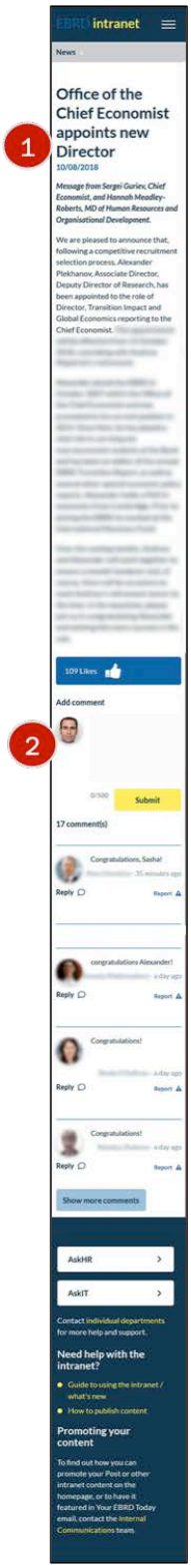


Image 105. EBRD Intranet Mobile Articles View. Articles are streamlined for mobile access. *105_EBRD_09_mobile_article.png*

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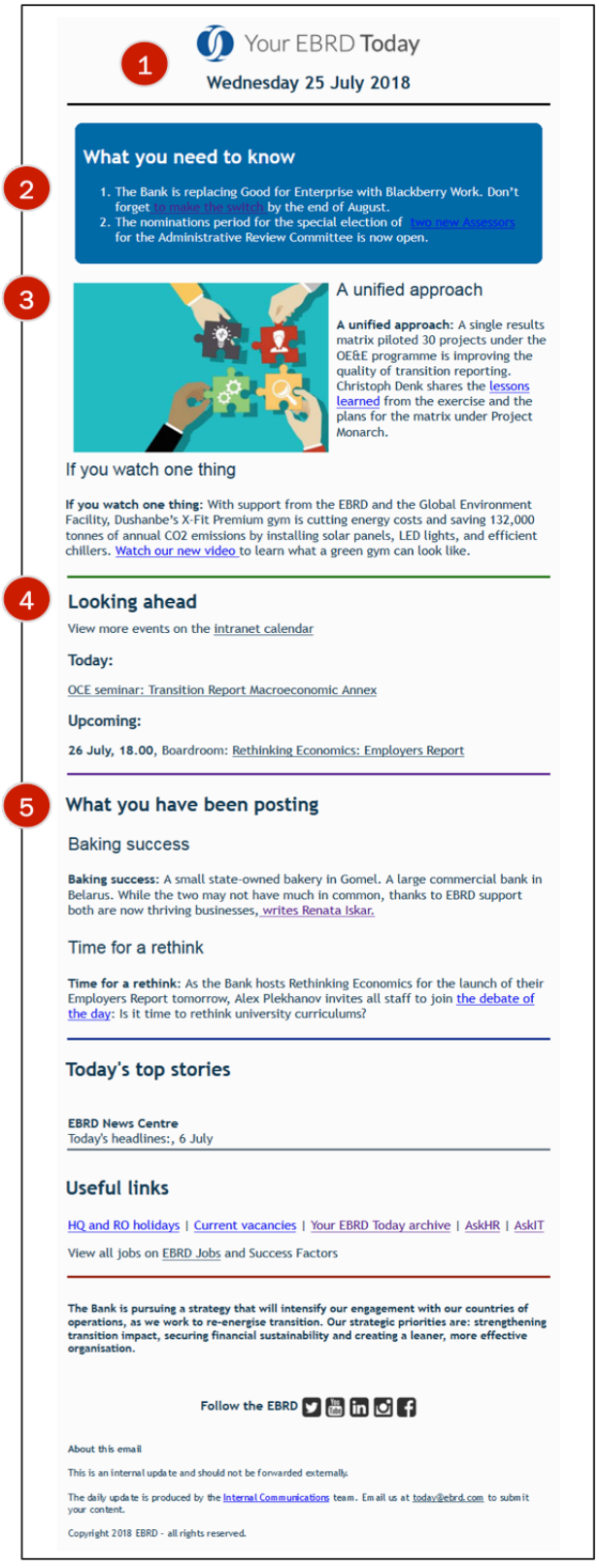
Article, Mobile Highlights

At the time of the new intranet's design, the mobile strategy was still forming; that, coupled with limited usage of internal systems on mobile, led the intranet team to develop as much responsive functionality as possible, while focusing on getting desktop access at good as it could be. In the end, about 75% of the intranet (excluding more complex transactions) works on mobile, and articles and posts viewed on phones look a lot like they do on desktop.

The team's creative "coping strategy" for dealing with items that are not mobile-friendly is to warn users before they hit an unfriendly mobile app. The team created introductory pages about key applications and included an explanation on those pages about how mobile-friendly (or not) an app is, along with a link to the application.

1. **Title, date, and author:** The title, date, and author appear at the top. Some of the author information and images are omitted or condensed.
2. **Comments:** As on desktop, comments and a comment field appear at the end of the article on mobile.

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Email Newsletter

Image 106. EBRD Intranet Email Newsletter. The *Your ERB Today* email newsletter is sent to all employees once a day to brief them on the day's news topics and announcements. *106_EBRD_10_email_composition.png*

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Email Newsletter, Highlights

To eliminate the many daily emails department were sending to all employees, the team created a system to easily compile information from the CMS into a special email template tool. The Corporate Communications team curates the content to be included in the daily email message. This message offers a simple way to remind people to check out the intranet news, while at the same time giving them a taste of some of the day's topics. Consolidating the messages into a single email eliminates frustration, clogged email inboxes, and the risk that employees (when they become inundated) will ignore the messages.

1. **Title and date:** The newsletter title and the date appear at the top of the message.
2. **Need to know:** The top blue section, *What you need to know*, includes urgent and somewhat urgent information. The visual treatment, title, and position at the top clue employees to the items' importance. Links lead to more information, and the words used as links are descriptive. Users scanning to the links can get a sense of what the topics are (as opposed to links with generic terms, such as *go* and *more)*.
3. **News summaries:** A few current news items produced by Corporate Communications appear next; these items are intentionally spare and include just enough information—a title, a brief summary, and an image (if applicable)—to give employees a basic idea of the news story, along with a link to the full article on the intranet.
4. **Events:** The *Looking ahead* section shows items on the corporate calendar for the current day and the near future, along with a link to the calendar itself. These help employees stay up-to-date on relevant events.
5. **Posts:** Articles written by employees appear in the *What you have been posting* section. In keeping with the newsletter's minimalist content theme, these entries include only a title, short description, and link to the article on the intranet.

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Space

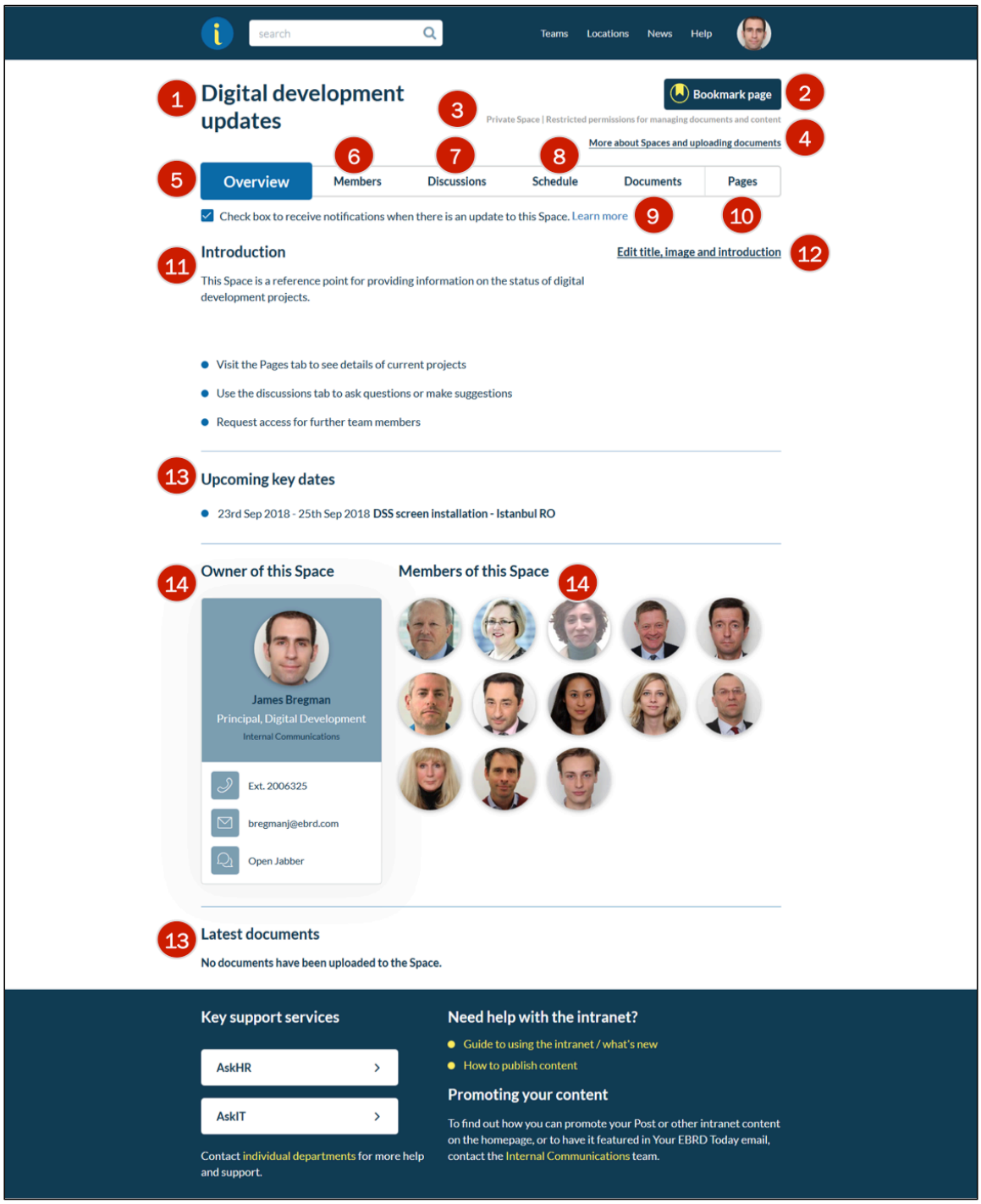


Image 107. EBRD Intranet Spaces. *Spaces* makes it easy for employees in different countries and time zones to collaborate.
107_EBRD_11_space_main.png

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Spaces, Highlights

Spaces was designed to be an extremely easy-to-use collaboration tool that was nonetheless rich in features and functions. The team iterated the design many times to simplify it, making it a more desirable solution for their users than third-party commercial collaboration applications, which are more robust but also more complicated to use. *Spaces* aims to create order in collaboration in place of the disorder of fragmentation and too many third-party applications used by EBRD. Although the bank still uses third-party tools for some large-scale knowledge management activities, *Spaces* aim to be the primary platform for simple internal collaboration.

Another great benefit of the individual *Spaces* is that they are easy to find; they are included in site search and saved on their members' profile pages.

Finally, because EBRD staff work in many countries and time zones, *Spaces* provide a thoughtful, organized method for collaboration among disparate staff (and those working on cross-departmental projects).

1. **Name:** The space's name appears in large letters at the top.
2. **Bookmark:** As with articles, employees can bookmark a space to make it extra easy to find. The blue *Bookmark page* button appears consistently in the upper right of the page.
3. **Access:** If an administrator has made a space private, this status shows at the top of the page.
4. **Help:** Users can find more information about spaces and their features via the *More about Spaces* link.
5. **Overview:** The default space page is the *Overview* and is the first tab selected in the set of tabs at the top. The selected item appears in blue with bold white text that is larger than the text used for unselected tabs. This visual change for the selected item makes it easy for users to see where in the UI they are, and the topic title is sufficiently visible and informative to eliminate the need for an *Overview* title on the page.
6. **Members:** The *Members* tab displays a page listing all of the space's members. The administrator can add and remove members via this tab.
7. **Discussions:** Members discuss and collaborate on space-related topics.
8. **Schedule:** Users can share any time-related items on this page, including project milestones, targets, meetings, and events.
9. **Documents:** A robust *Documents* section allows users to post documents and make them discoverable by adding metadata. Users are encouraged to categorize documents in sections related to the appropriate theme and to tag documents with keywords.
10. **Pages:** The *Pages* section is an area open for members to create pages. Those pages can include files, such as presentations.

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11. **Introduction:** The default introduction for any space describes *Spaces* and a few of its features.
12. **Edit introduction:** Using the *Edit title, image and introduction* link, the space owner (administrator) can easily change the introduction to tailor it more to the space.
13. **Dates and documents:** Key upcoming dates and the latest documents posted are called out on the overview page, giving members a snapshot of recent happenings before they dig in to the space's other tabs.
14. **Owner and members:** The space owner's card is displayed with the person's photo, name, job tile, department, phone extension, email, and a link to the instant messaging tool. This makes it easy for people to request access to a space or inquire about it, or for existing members to get assistance. Member photos appear to the right of the owner, showing the richness of the community.

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Space Creation

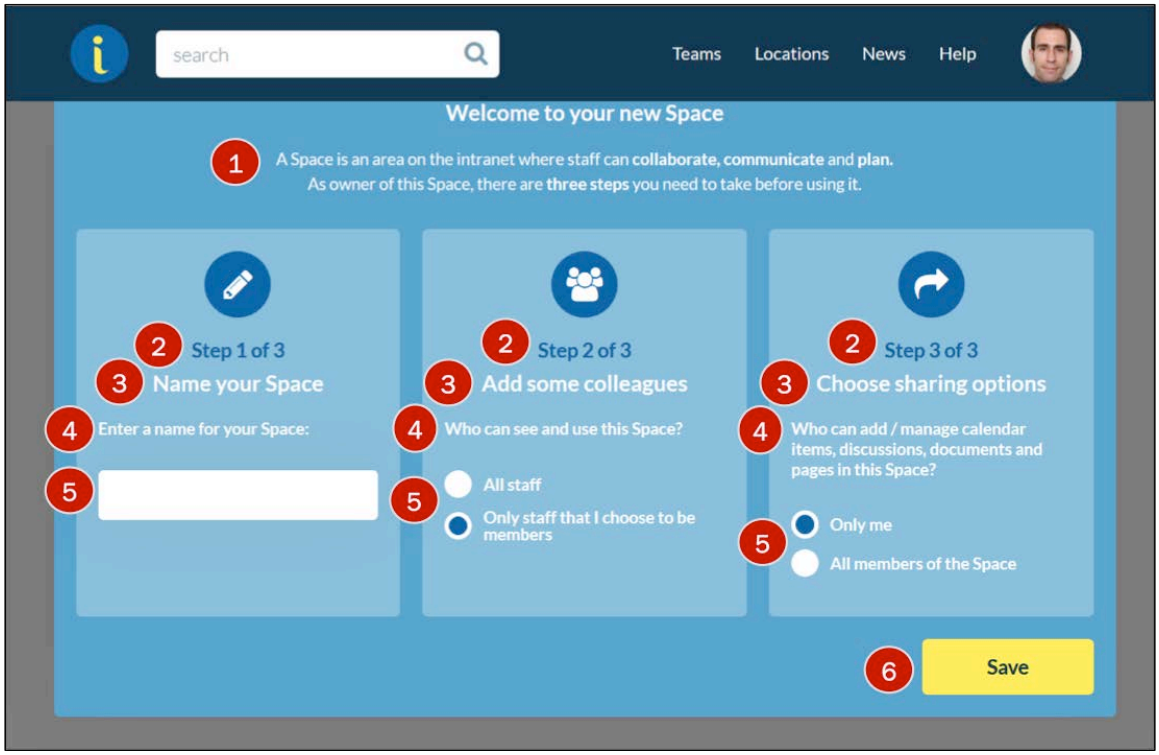


Image 108. EBRD Intranet Space Creation. Employees can create a new space quickly and easily. *108_EBRD_12_space_creation.png*

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Space Creation, Highlights

Spaces are fast and easy to create. Employees initiate the process by clicking their login photo in the upper right of pages. This reveals their personalized menu and a link to create a new space; once they click the link, they are then guided through space creation. The space will go live on the intranet almost immediately.

The space creation screen was a feature that the design team agonized over in great detail. The team knew it was absolutely critical to get this screen perfect if people were going to use *Spaces* at all. Its ease of use and simplicity were as important as the UI within the spaces themselves. The team continued to work on this tool late in the project using an external designer who hadn't seen the rest of the project. This was an unintentional but useful plus, as the designer's lack of prior knowledge positioned her well to focus solely on creating a slick, easy-to-use design.

1. **Introduction:** A short introduction at the top of the page communicates the basic features of *Spaces*.
2. **Numbered steps:** A wizard-like approach, complete with chronological steps, leads the space owner through the creation process. The numbers indicate the chronological steps, and the total number of steps (3) lets users know they don't have far to go to finish the set-up.
3. **Step names:** Each step has a name that identifies what the user is doing in the process.
4. **Labels:** Labels for the field and radio buttons are ultra-easy to understand. Roles with unusual names or branded actions don't muddy the interface. Instead, the welcome UI uses plain and natural language, with questions such as, "Who can see and use this Space?" that have clear options for answers: "All staff" and "Only staff that I choose to be members." What could be easier?
5. **UI elements:** The text field is empty and white, making it clearly visible and easy to type in. Radio buttons are slightly oversized and easy to click.
6. **Call to action:** The *Save* button call to action is positioned in the expected chronological space at the end. The yellow button stands out against the blue page background and the page's overall color palette.

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Space Pages (Wiki)

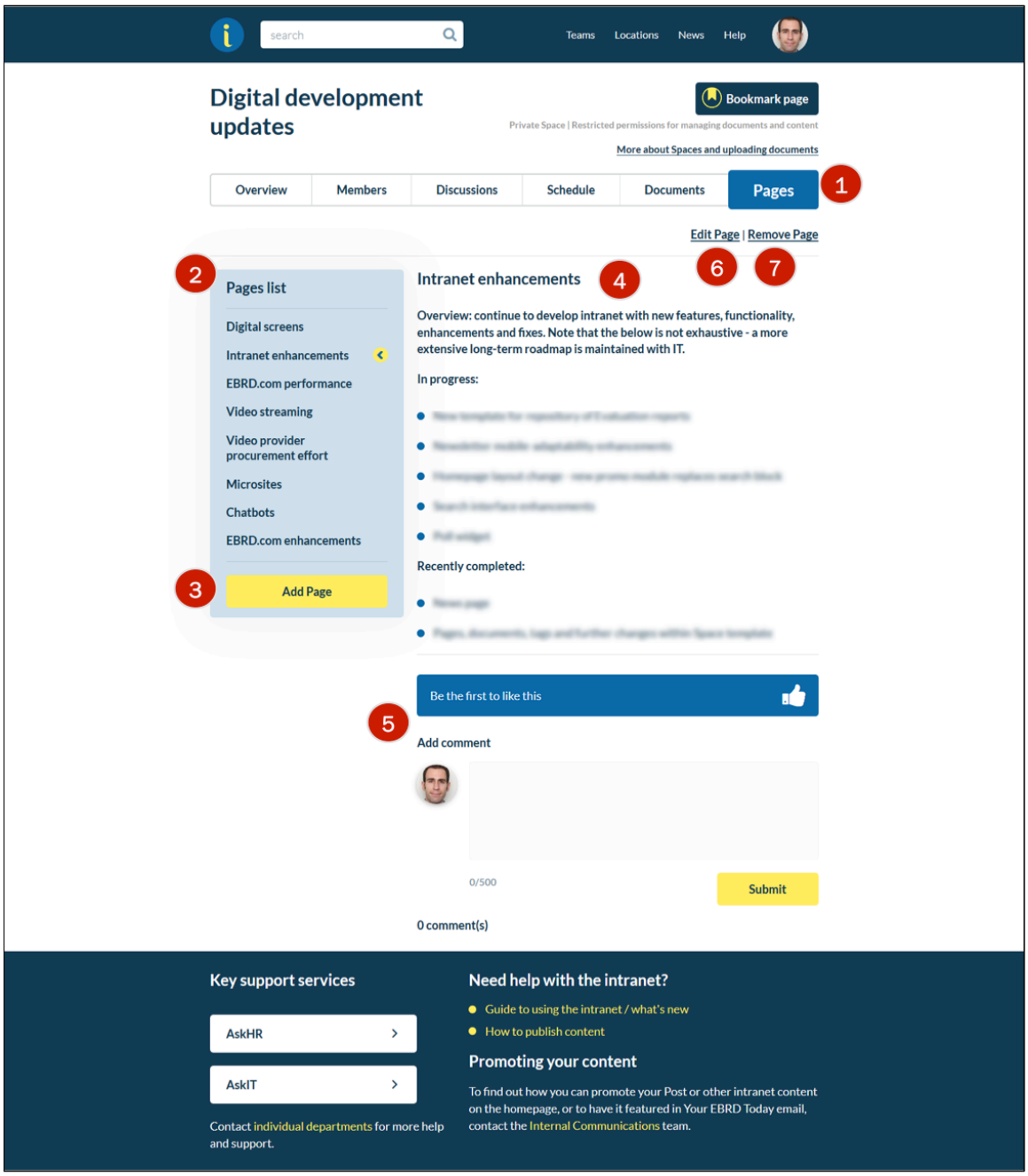


Image 109 EBRD Intranet Space Pages (Wiki). Users can create webpages in the space related to the project. *109_EBRD_13_space_wiki_pages.png*

Space Pages (Wiki), Highlights

The *Pages* area in *Spaces* lets members add content as web pages within their space.

1. **Global navigation:** The *Pages* menu in the global navigation appears selected, showing which section of the space the user has entered.
2. **Menu:** The *Pages list* area, delineated with a light blue background on the left side, acts as a secondary menu for the site's *Pages* section. Each page in the *Pages* section is listed here, and users can click the links to navigate to each associated page.
3. **Adding pages:** At the bottom of the menu is a highly visible bright yellow *Add Page* button that matches the style of the *Spaces* template. The label itself is clear and understandable, while the button's visibility and simplicity make it obvious that members are allowed to add pages.
4. **Content:** The content section of pages offers legible text, an appropriate text column width, and bullets—all of which make the page easy to scan or read.
5. **Comment:** Users can easily like and comment on pages through a standard commenting UI.
6. **Editing content:** An *Edit Page* link in the upper right makes it more likely for people to keep page content current, because it is visible and easy to access.
7. **Removing content:** Likewise, the *Remove Page* link makes it easy for page owners to delete expired content.

Calendar

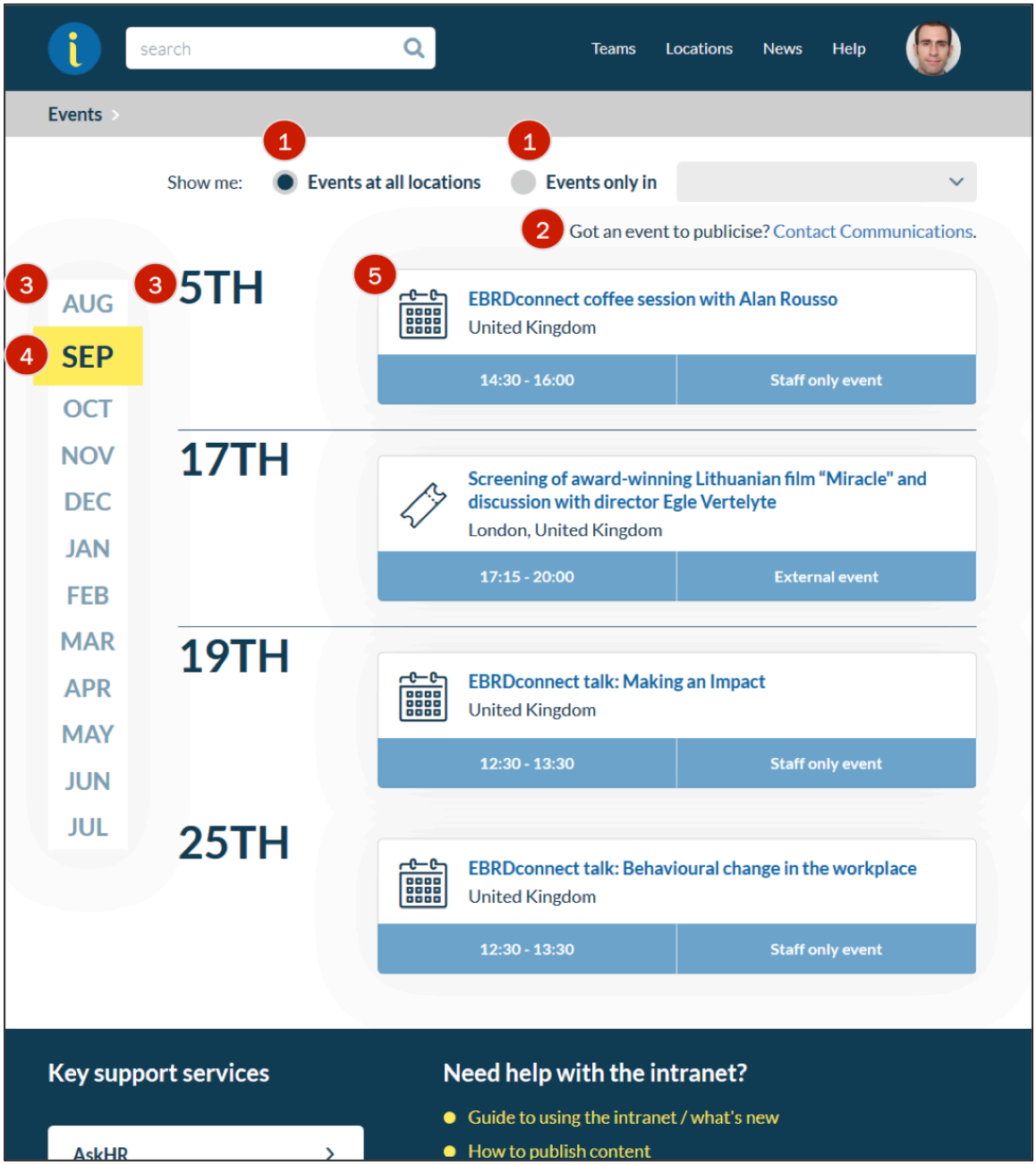


Image 110. EBRD Intranet Calendar. Most employees access the EBRD corporate calendar regularly. *110_EBRD_14_calendar.png.png*

Order NNG190115-7904-48466

Calendar, Highlights

EBRD hosts, sponsors, or co-organizes thousands of events each year. Many employees are involved or interested in these events; to find them, most rely on the corporate calendar, which is accessible from a link on the homepage. A few upcoming events are pulled from the calendar to appear on the homepage.

1. **Where:** Employees can filter calendar events by specific locations or see all locations. This lets users find local events as well as see all the events in which EBRD is participating. Radio buttons with clear language and a drop-down list of locations make it easy for users to filter events.
2. **Create an event:** The *Contact Communications* link lets any employee add an event to the calendar and publicize it.
3. **Month and date:** The month and date are presented in large text that is pleasing aesthetically and easy to read. The month navigation is sticky, so if users scroll through many events, they can still see the month on the left.
4. **Selected month:** The selected month is highlighted in yellow, matching the color palette for the rest of the intranet (such as the yellow call-to-action buttons used in *Spaces*).
5. **Event:** Each event lists the event name, location, time, and whether the event is employee-only or open to those outside EBRD. Having internal and external events on the same calendar fosters a feeling that all events are important.

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Event

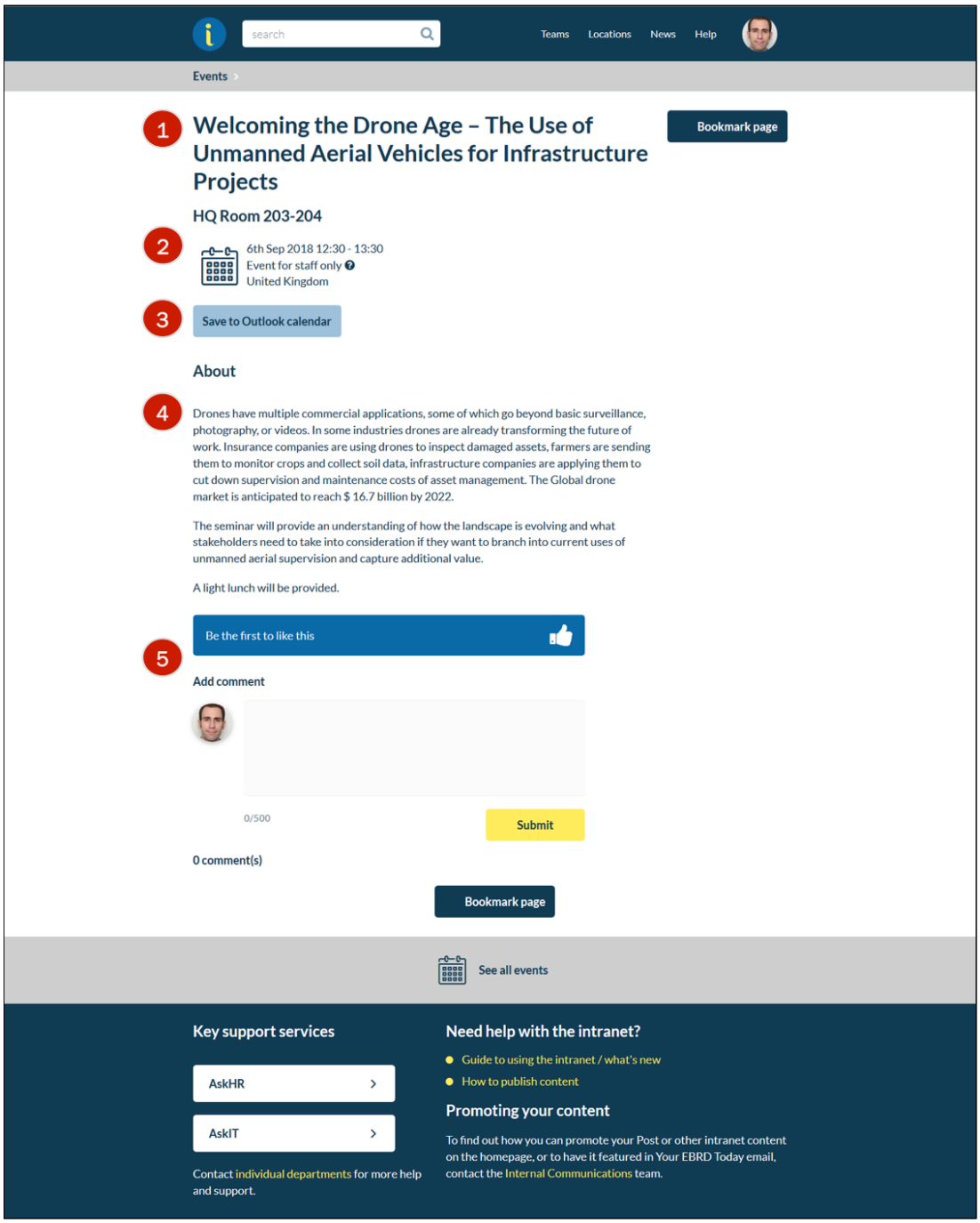


Image 111. EBRD Intranet Events. Each event has its own detail page that summarizes the event information and its time and location. *111_EBRD_15_event_page.png*

Event, Highlights

Event pages provide everything employees might need to know about an upcoming event.

1. **Name:** The name of the event appears in large letters at the top of the page.
2. **Location, date, and time:** Details of the event's location are available below the title, along with the date and time, and whether the event is public or employee-only.
3. **Save to personal calendar:** Users interested in an event can add it to their own calendar easily by clicking the blue *Save to Outlook calendar* button.
4. **Description:** Event details entice employees to participate.
5. **Comments:** As with articles and in *Spaces*, users can comment on and like events. This helps users gauge interest in an event and in particular types of events.

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Search Engine Results Page, (SERP)

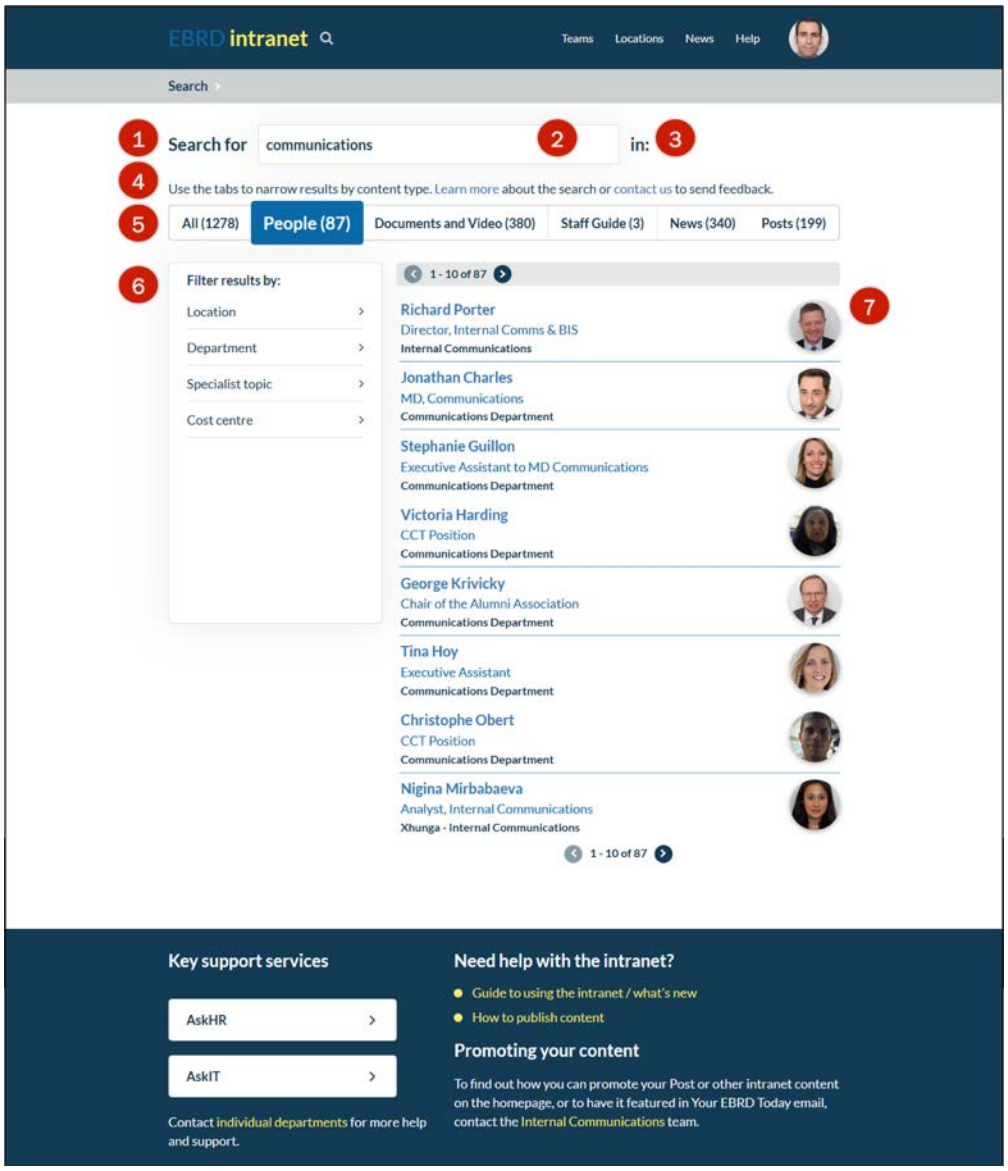


Image 112. EBRD Intranet Search Results. Search results appear as users type. Users can filter the results by various criteria.
112_EBRD_16_search_results_filter1.png

Order NNG190115-7904-48466

SERP, Highlights

One of the main goals the team achieved was to make searching quick and easy, while still offering granular controls for users who need them. The team also added an interesting document-related search enhancement that provides context: A *show where used* link near each result opens a small panel that shows links to all of the pages that reference the document.

1. **Label and field:** The *Search for* label makes it abundantly clear that the field to the right is the place to type the query.

Invoke the query: The search (powered by Solr, the bundled search in WebCenter Sites) offers results as users type their queries. Predictive search results also drop down from the field as the user types. There is no Search or *Go* button to invoke the search. As with sites such as www.kayak.com, for example, fast results appear as the employee types, so buttons are not necessary.

"In": The small but important word *in:* indicates that there are more options users can choose related to their search results. The word, followed by a colon, tells users to look below and see what is selected, and which options are available.

Type narrowing tip: A short prompt suggests that users narrow the results by type, which is done by selecting a tab. This is a helpful (but not distracting) way to alert users to the narrowing features.

Type tabs: The large tabs at the top of the SERP let users show results of a certain type, such as *People* or *Documents and Video.* the small number by each tab's label indicates the number of results of that type. The selected tab is indicated with a blue background, making it stand out. The default tab is *All*, which is a smart selection to start with.

Filters: Additional filters appear on the left of the SERP.

People SERP: When the *People* tab is selected, the results show the basic details about the people along with a photo, which is a nice touch.

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SERP Filters

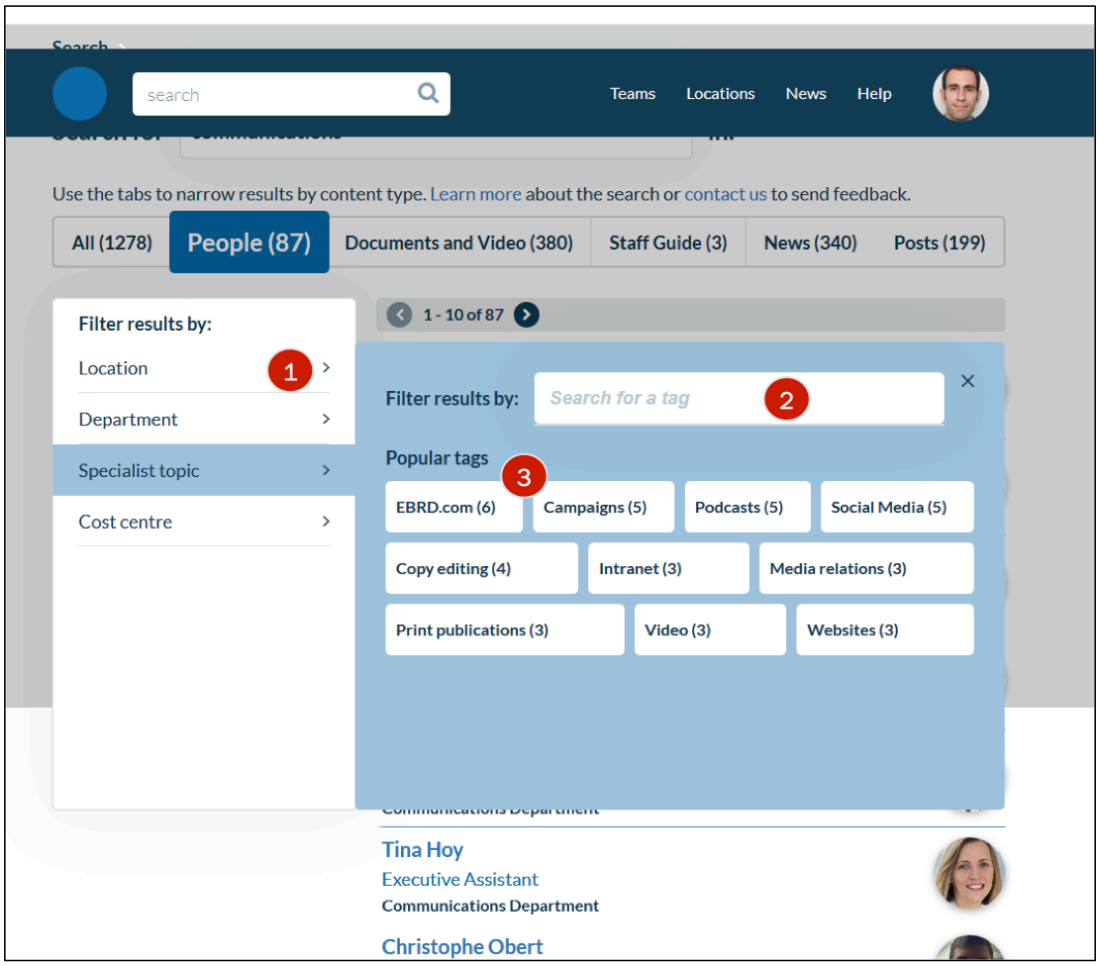
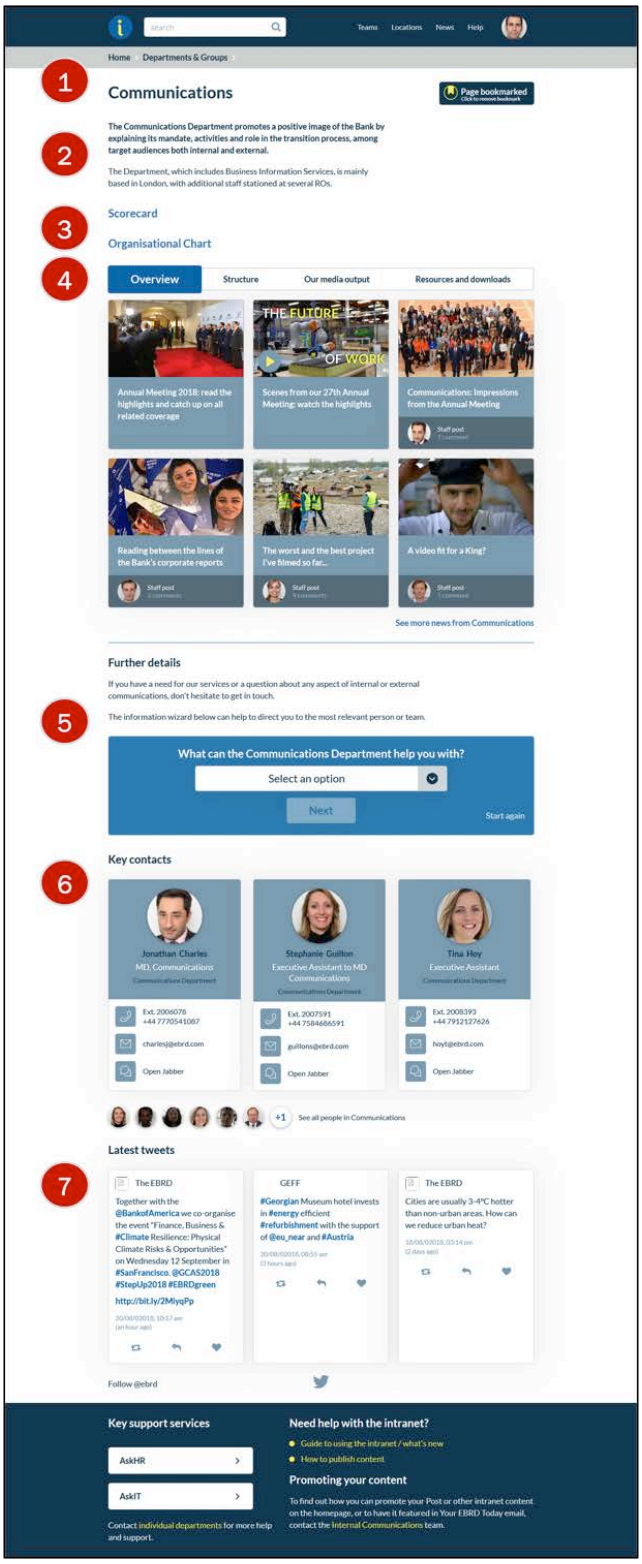


Image 113. EBRD Intranet SERP Filters. The suggested tags make using filters error-proof. *113_EBRD_17_search_results_filter2.png*

SERP Filters, Highlights

A menu of filters leads users to the next step as they narrow their search.

1. **Arrow:** A small arrow icon pointed right indicates that the link will expand.
2. **Field:** Users who have an idea of the tag they want to use can type it in the search field.
3. **Suggested keywords:** To make choosing a tag even easier and make users aware of popular tags, keyword suggestions are listed below the blank field. Clicking a tag will add it to the search.



Department

Image 114. EBRD Intranet Department Pages. All teams and groups are represented on the EBRD intranet. These sites use the *Team* template, sometimes with minor tweaks. *114_EBRD_18_department.png*

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Department, Highlights

Like many banks, EBRD has numerous complex hierarchies of divisions, departments, groups, and subgroups. Rather than attempting to present this complex hierarchy in the intranet's menu structure, the team simplified the idea and created a *Team* template. This template is used to communicate information about any staff grouping. With a little configuration, the *Team* template can be used for a huge subdivision or a small team within a department or and anything in between. Participants in user tests understood the interface, and using this template approach helped to equalize content based on employee needs rather than organizational hierarchy.

1. **Title:** The department name appears at the top of the page.
2. **Description:** A short description acts as an introduction to the department. Reading these is a great way for employees to get acquainted with all of the EBRD teams.
3. **Org chart:** An *Organisational Chart* link leads to a hierarchical diagram that shows how the team is organized.
4. **Details tabs:** The in-page tabs lead to sections with further details about areas such as structure, media, and resources.
5. **How the team can help:** A *Further details* section describes the services that the team can provide to EBRD employees. In this example, a short wizard leads employees through a set of questions that helps them see the many benefits gained from engaging the team.
6. **Contacts:** A list of *Key contacts*—which includes the names, jobs, photos, and contact information for various department staff—appears toward the end of the page.
7. **Tweets:** The department can include Twitter feeds that it subscribes to at the bottom of the overview page.

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Department, Mobile

Image 115. EBRD Intranet Department Page, Mobile View. The same information on desktop appears on mobile, reformatted to fit the smaller screen.
115_EBRD_19_department_mobile.png

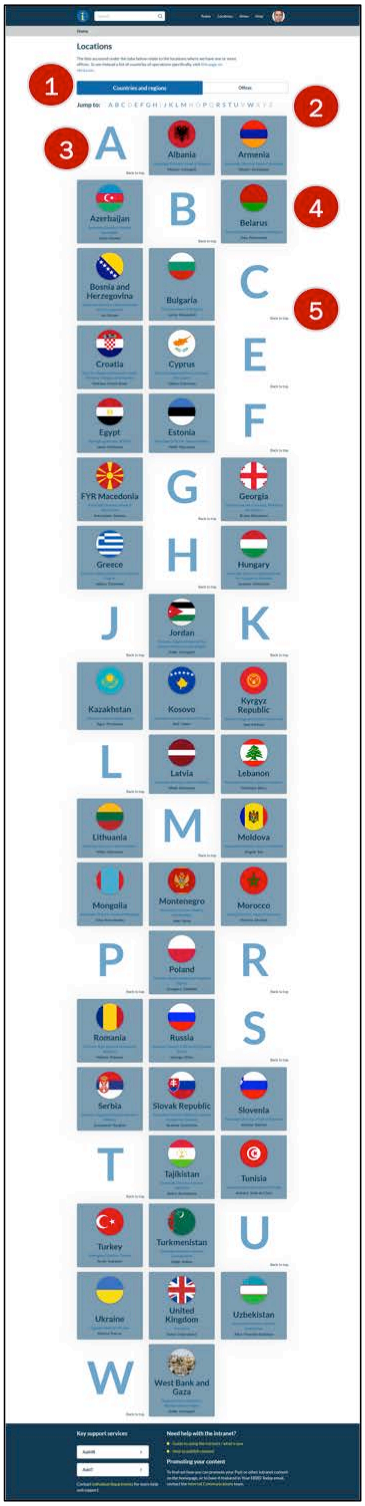
Department, Mobile Highlights

When the department page is viewed on mobile, the layout drops most of the vertical columns to display a single-column layout.

1. **Vertical menu:** The horizontal tabs on desktop are arranged as a list of vertical links on mobile. The background of the selected item turns blue; the other tabs display as black text on a white background.
2. **Open in place:** The selected button opens the related content in the current screen.

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Country List



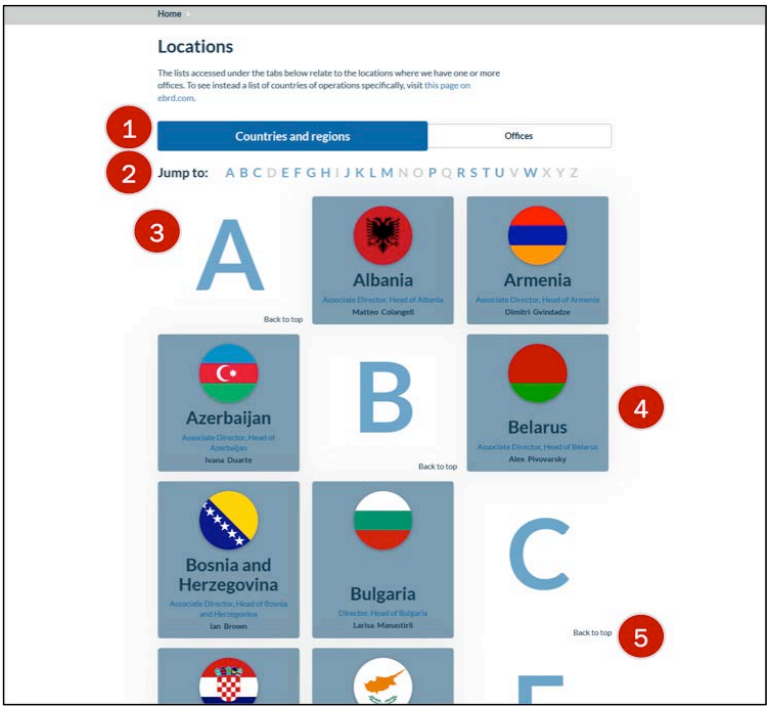


Image 116 EBRD Intranet Country List. The dozens of countries in which EBRD staff work are listed on the *Locations* page.
116_EBRD_20_country_list.png

Order NNG190115-7904-48466

Country List, Highlights

EBRD staff work in many countries. Each country is represented on the intranet and can be found in the *Locations* area under the *Countries and Regions* tab.

1. **Tabs:** Tabs at the top offer choices for viewing *Countries and Regions* or *Offices.*
2. **Alpha list:** The list is sorted alphabetically so that users can choose a letter in the *Jump to* list of letter links at the top to go to that letter's section of the page.
3. **Letter card:** Very large blue letters act as a signpost for the next set of countries in the list.
4. **Country card:** Each country is represented in a blue card, which includes the country's name and flag, the manager responsible for the country or region, and his or her name.
5. **Easy page navigation:** A small *Back to top* link appears in the bottom right of each letter card; this makes the long page easier to navigate.

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Country

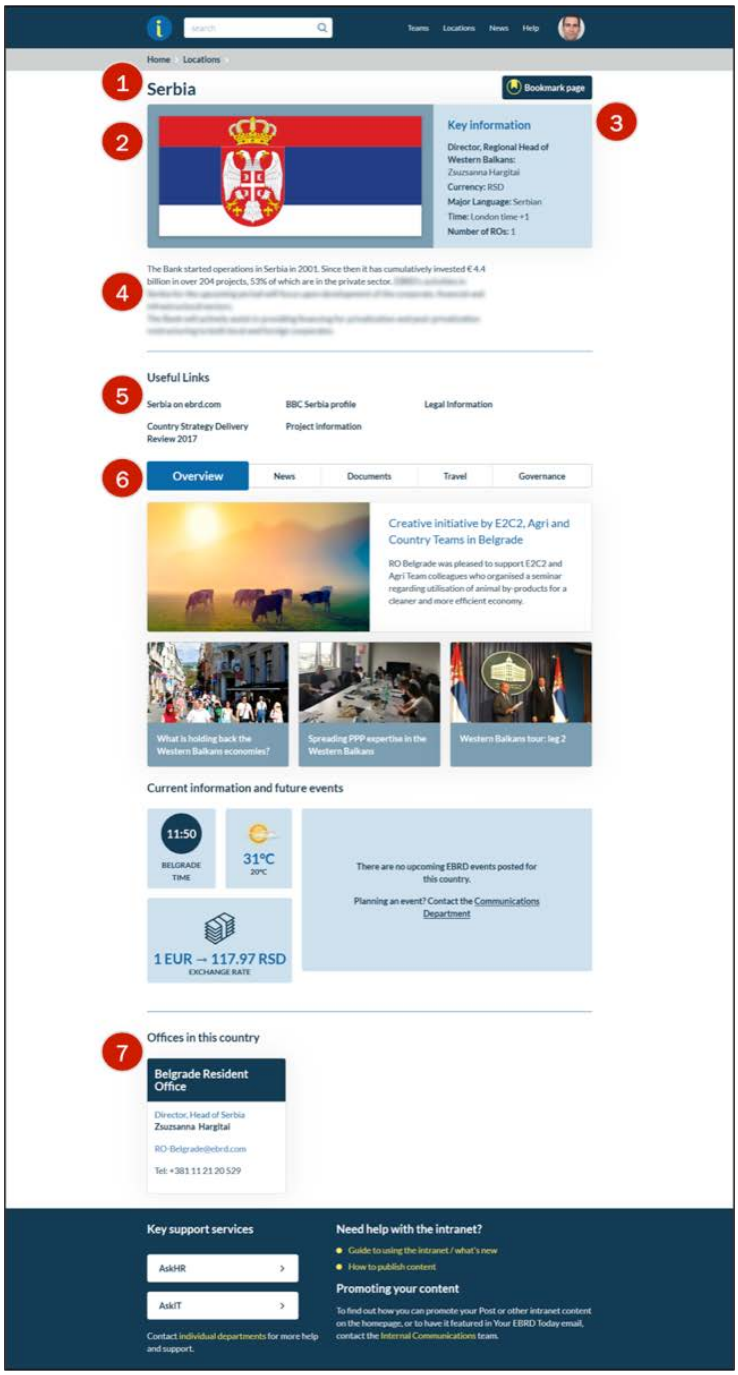


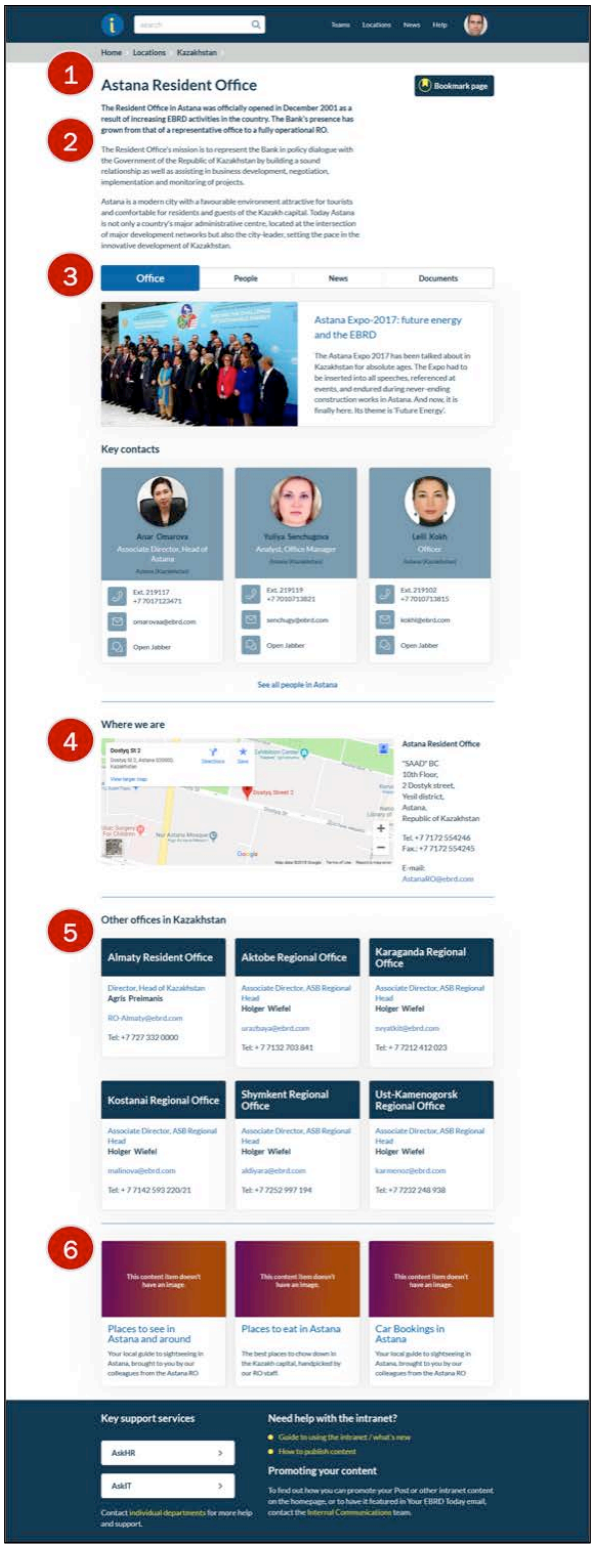
Image 117. EBRD Intranet Country Pages. Country pages include key information and are helpful for coworkers visiting that location. *117_EBRD_21_serbia_country_page.png*

Country, Highlights

Because many employees travel between countries for work, the country pages were created to help people get the lay of the land before they arrive. These pages can also help employees who work in those countries, as well as other employees who are curious to know how and where EBRD operates so they can better understand their employer.

1. **Name:** The name of the country appears at the top of the page.
2. **Flag:** A large image representing the country's flag adds a touch of personality and a splash of patriotism to the page.
3. **Stats:** The *Key Information* section appears near the country flag and lists the highest-level mangers, currency used, major language spoken, time zone, and number of regional offices.
4. **Description:** A short description summarizes EBRD's past and current work in the country.
5. **Links:** A set of useful links leads to country-related resources that visitors might not think to look for on their own.
6. **Tabbed Sections:** The page's tabbed sections include information about everything from the weather to travel, health, and security information.
7. **Offices:** Office information at the bottom of the page lists the country offices and their basic information, including address and phone number.

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Office

Image 118. EBRD Intranet Office Pages. Office pages are similar to country pages and provide pertinent information about various offices.
118_EBRD_22_astana_office_page.png

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Office, Highlights

The regional office pages are designed for two types of users: 1) employees working in that regional office, and 2) colleagues planning a visit. The office pages resemble the country pages, but they use their own template (based on the *Team* template, but with expanded features). The team aimed for familiar UI traits, but because the team and office pages had key differences that couldn't be covered by a single template, the team created an extension. The office pages house different types of content than the country pages, and have their own personality.

1. **Name:** The office name appears at the top.
2. **Description:** A short summary describes the office and its mission, and often describes the city in which it resides.
3. **Tabbed sections:** The tabbed sections include details about the office, including a mix of local news and logistical information, including key contacts, news, and documents. A link at the bottom of the *Key contacts* section leads to a list of all contacts in the country, making it easy to locate resources.
4. **Map and location information:** A map, address, phone number, and email address make it easy to know how to contact the office.
5. **Other offices:** A set of cards for other offices in the same country appears below.
6. **Travel resources:** The page's final section includes specific details about getting around, such as basic location information, what to eat, and how to travel (for example, by car or by shuttle). This can help employees feel more confident and in control of their visit when they travel to the office. It can also save the company money when people are given good travel suggestions that meet EBRD requirements and guidelines.

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Profile

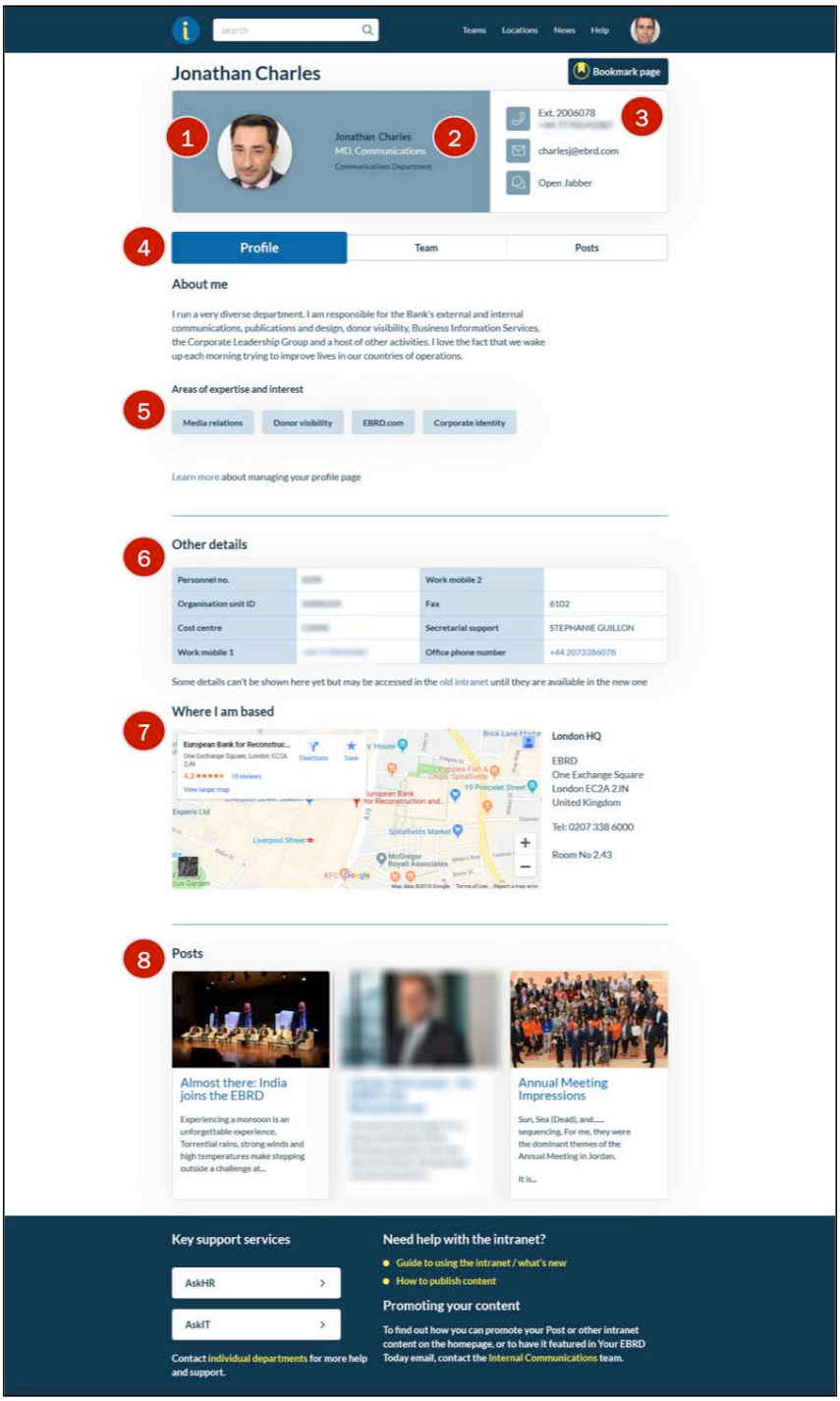


Image 119. EBRD Intranet Profile Page. Employee profile pages help employees learn about one another. *119_EBRD_23_profile_main.png*

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Profile, Highlights

Information in the employee profile documents includes a combination of content written by employees themselves and information extracted from SAP (which was no small feat to achieve in the format needed.) The team worked with the SAP developers to get the pages into the desired format, and the team's vigilant planning regarding profile tone and the information each would provide paid off. Other work ensured that profiles are included in the site search.

1. **Photo:** Photos of employees personify them. They also help employees recognize each other.
2. **Basic information:** The person's name, title, and department—the key employee information—appears with the photo.
3. **Contact:** One of the top tasks on most intranets is to find a colleague's phone number. Thus, the employee's phone number appears at the top, followed by an email address and an instant messaging link.
4. **Tabbed sections:** Employees can edit their own *About me* section, expressing the things they want their coworkers to know about them. Most people write a short biography. Their team information, including where they sit on the org chart, appears in the *Team* section. The *Posts* area consolidates all articles the person has written on the intranet. Users can also add links to external sources relevant to them.
5. **Expertise:** Users can choose from a set of tags to describe their skills or areas they work on. These tags are also included in the site search so coworkers who search for a topic in an employee's keyword set will find that employee. Users can also refine results based on these tags, so an employee looking for special skills can home in on the right set of colleagues.
6. **Details:** Other specific details, such as cost center and administrative assistant, appear in a table.
7. **Office location:** The user's office address and a map appear next in the *Where I am based* section.
8. **Posts samples:** Cards for three of the user's most recent posts also appear at the bottom of the profile page, providing an immediate taste of the person's work and insights.

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Staff Guide

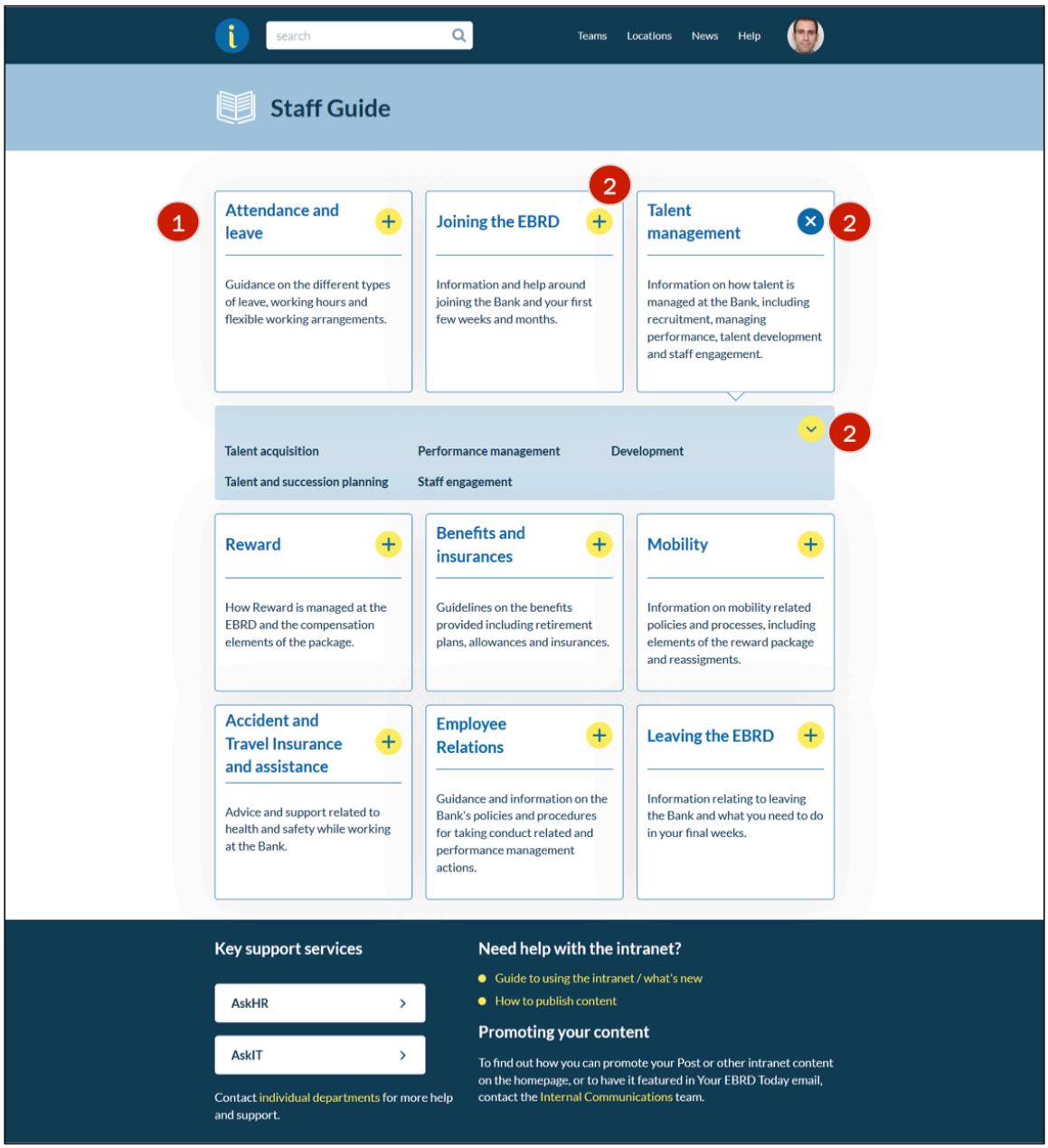


Image 120. EBRD Intranet Staff Guide. The intranet's *Staff Guide* section, which will be its own site in the future, includes all policies for EBRD employees. *120_EBRD. EBRD_24_staff_guide_main_page.png*

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Staff Guide, Highlights

The *Staff Guide* comprises a newly rewritten set of all policies, reference points, and legal information related to working at EBRD. The team was tasked with making the *Staff Guide* a self-contained site-within-a-site because the section will likely be spun off from the intranet eventually. So, while the team used a similar look and feel as the rest of the intranet so employees can move seamlessly between the apps, there are a few areas with UI differences and unique in-page components (such as Q&A modules).

1. **Cards:** Each topic has its own simple card with a title and description.
2. **Links:** Clicking the yellow plus icon opens a blue menu of links related to the topic. The blue *x* icon closes the menu.

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Onboarding

Image 121. EBRD Intranet Onboarding. The onboarding section is comprehensive and highly informative for new employees. *121_EBRD_25_staff_guide_content.png*

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Onboarding, Highlights

In this section, new employees can learn a huge amount about what they need to know and do during the first month of EBRD employment.

1. **Title and introduction:** At the top of the page, new employees are offered a warm and fuzzy welcome. This sets a comforting tone and lets them know that the document will lead them through the steps they need to take to onboard.
2. **Anchor links:** The *On this page* section in the right rail lists the subtitles for each page section. This is helpful on such a long page, and gives employees tools to manage their access to the available content based on what they need. For example, new employees who have been at EBRD for two weeks can quickly skip: *What you need to do/learn in your first week* section.
3. **Onboarding process:** This section provides specific information about who to contact for clarification and where to submit official documents as part of their onboarding process.
4. **Milestones:** Three basic milestones—first day, first week, and first month—are neatly broken down for employees. Each title is followed by a table with a list of steps, useful links, and details about each to-do item.
5. **Documents:** Two documents—*New starters presentation* and *Code of Conduct for EBRD personnel*—are ready for download from the *Documents* section.
6. **FAQ:** A few of the most frequently asked questions appear near the end of the page. Clicking the blue plus icon expands to display the answers. This is helpful for new hires who don't want to ask too many questions.
7. **Contact info:** The *Ask HR* section on the bottom left of the page offers a phone number and email address. It's helpful to give new employees multiple options for getting answers, and the immediacy of the phone and email can prevent them from sitting too long on a question that's bothering them.
8. **Page feedback:** Users can give feedback about the page through a star rating or by writing comments. This helps the page owners make improvements.
9. **Related pages:** The page's last section before the footer, *Other pages in Joining the EBRD*, lists related pages in the onboarding section.

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DESIGN PROCESS AND USABILITY WORK

The clock was ticking for the design team. It had to approach design and research in a way that would allow it to meet the project's pressing schedule demands—and do so without straying from best practices and conventions.

Luckily, before the project was green-lit, there was already useful data available from a staff questionnaire that had been conducted the previous year. That questionnaire asked people for their wish list for the new intranet, as well as to compare the legacy intranet to any others they'd used in previous jobs. The stories they told provided interesting insights into which features and functionality people had seen and used at other companies, and which were lacking at EBRD. This information served as a starting point.

Initial User Testing

Once funding had been approved, there was a short gap before the project could fully begin. The team therefore decided to use that small window to run some informal user tests. The goal was to get a head start, if possible, and gather some initial feedback that would prime the pump and help team members begin to generate ideas. Their hope was that the exercise would save them some time and provide some focus. In the best-case scenario, they thought the information might provide directional clues about where to steer certain features and how to prioritize others—as well as what they could rule out.

About 20 staff members were invited to participate in interviews focused on what they'd like to see in a new intranet. During these sessions, the team also gave participants very simple clickable Axure prototypes to look at that illustrated potential new features and layouts. Finally, the team led participants through existing intranet user journeys and asked for feedback.

The goal of these tests was not to dive into a granular level of detail, but rather to get a general sense of areas that might be of interest to users. Team members could then pass this information on to their agency partner, Manifesto, to serve as a jumping off point when their work commenced. The outcome from these sessions was a lot of truly valuable initial feedback.

Diving into the Details

Team members also considered specific aspects of the intranet in their research so that they could make decisions regarding how to best use intranet tools to serve the EBRD's specific needs. These needs included:

- **A customized experience:** The team investigated what people thought of having a flexible intranet that would let them configure the homepage, dashboard, and other parts to suit their preferences. Users liked this idea and specifically said they wanted tools they could use to set up quick access to their favorite applications.

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- **Social:** Looking at various social approaches made it possible to see nuances that would affect their use at EBRD. Staff liked the idea of sharing and collaborating, as long as it didn't become too pervasive. They consistently indicated a strong preference for social elements sprinkled around the intranet, but did not want an intranet centered around any kind of underlying feed or other features that were similar to a typical social network. This was very useful because, at one point, EBRD had considered using something like Facebook Workplace instead of creating a new intranet—or at least as a supplement to an intranet—but all signs from testing indicated that this was not an avenue to pursue.
- **Tone:** Tone was another element that came up in the research. Social interactions were deemed useful and professional, but if they felt or looked too lightweight, some staff said that might deter them from engaging in case their managers thought it was frivolous.
- **Search:** Some unexpected things emerged from the research also—particularly around information-finding habits. When staff looked at early prototypes and were invited to give task-based feedback (e.g., "Where would you click on this page to find section XYZ?"), they consistently overlooked the search bar and focused entirely on navigating through clicks. When asked about this, they often said that because the old intranet search was essentially broken, they hadn't thought to use the search in the new prototypes. This reinforced the need for a change management effort that included basic elements such as getting staff to use internal search, as they were completely unaccustomed to doing so on the legacy site.

The various findings from these early tests were passed on to Manifesto to feed into the agency's discovery phase, and they also helped the EBRD team communicate what it was looking for from the agency.

Once the Manifesto team began working in-house, it continued to run regular user test sessions on many UI elements during development. The search interface, which was relatively complex in its mechanics but had to feel easy to use, was among those elements subjected to particularly extensive rounds of testing.

Visual Design

To meet deadlines, visual design work began in parallel with UX. Even without wireframes to hang the test designs on, however, Manifesto had started to look at color palettes and styles to get a sense of the right visual tone. Quick and informal feedback sessions were arranged so it could gather instant feedback, and the team quickly reached a level of confidence about the tone and style needed.

Next, three rounds of these research sessions were held, with about 10 staff members in each. The team changed the session format from one session to the next. Some tests were designer-lead, which let designers direct the conversation and respond to feedback instantly to share their expert perspective, while other tests were run by project staff—without designers present—so team members could urge the users to offer honest feedback without fear of offending the designers. This

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unconventional research approach worked, with participants offering plenty of useful and consistent feedback. Aside from some employees needing time to adjust to the new intranet's much larger font sizes and "big overall feel," the design was very well received and the design schemes were finalized well before the IA and UX designs were complete.

Project Steering Group

A further useful—and unexpected—layer of UX and design input came from the project steering group, which met every 3–6 weeks. Formed to satisfy project management and governance requirements, the group also gave the team an opportunity to show designs, wireframes, and IA diagrams to yet another set of stakeholders (including some senior staff) for quick feedback. In addition to core research feedback, these demo sessions gave the team a general sense of which features would be the most impressive and accessible. Seeing this group's reaction to specific features gave the team a clear sense of which features and functionality would be the most effective when put at the forefront of internal marketing campaigns.

Creating an IA from the Ground Up

Manifesto began with a traditional kick-off workshop for the project team, where team members discussed how to best define who the intranet was for and what it needed to do. A major card sort was conducted to determine the functions of each of the existing intranet's different facets. This resulted in a set of approximately 20 of the most common interactions, which let the team map the existing paths that staff members used to carry out these tasks. The 80/20 rule played out heavily in the card-sort results: many user journeys, for all staff types, centered around just a few of the most-used areas and applications, particularly those related to HR self-service processes.

Because the timeline was tight and the legacy intranet didn't have a visible structure, breadcrumbs, or a coherent menu, the team took the unconventional step of auditing it and producing a site map for reference. Next, the UX team endeavored to quickly define a drastically simplified IA for the new site and then map existing sections onto it. Because the goal was to completely revise department content—and the departments were willing to do it—it was viable to start with a framework for them to bring their content into, rather than create a framework defined by what departments had done in the past.

The bulk of intranet content would logically be static sets of information related to different departments across EBRD. However, it was also essential that the IA and UI avoid any approach that would lead to departments obsessing over their hierarchal position or any other overly specific categorization. So, the team aimed to create a system in which the intranet IA was more about page *types* than the status of the team or groups using those pages.

On the old intranet, users could be on a page and have zero sense of where they were in the site hierarchy. Although this chaotic approach made navigating the site confusing, it had an unintended benefit: the intranet structure didn't fall into the classic trap of being hinged on the organizational structure of the bank itself.

For the new intranet, initial research indicated that staff was happy with that free-form approach as long as the content was findable, but at the same time, some kind of basic structure was needed.

EBRD has many complex hierarchies, including divisions, departments, groups, and subgroups, but the new intranet aimed to equalize them and present content based on need rather than for its own sake. For example, some high-level divisions didn't need a substantial page of content about them at all, while some small teams-within-teams-within-teams still had practical relevance for all staff and thus merited their own section.

So the preferred approach the team decided upon—and showed to test groups to confirm that the logic was appealing—was to simply have a *Team* template, which referred to any staff grouping. With only slight configuration changes, the *Team* format can cover anything from a huge subdivision of the organization to a small team within a department or a cross-departmental initiative—or even a social group. This kept UIs simpler and more consistent, and proved completely workable. Also, controls within the CMS would add definition to the correct type of content represented by each use of the *Team* page.

Such controls are useful in the A–Z index template, which aggregates *Team* pages and offers filtering by team type—including tabs for *Departments*, which covers departments of all sizes; *Initiatives and committees*, which covers staff outside of work groups, cross-departmental projects, staff networks, and so forth; and *Social Groups*, which accommodates staff-run sports and interest groups.

When it came to positioning content from EBRD's overseas Resident Offices (ROs), it was clear that the team format couldn't be stretched enough to cover RO requirements. User research had made it clear that RO pages had to offer a mix of local news updates and logistical information about that office. Thus, a custom template was needed to serve both types of staff: RO staff, who want to see what's going on; and other colleagues who want information about traveling to or engaging with ROs. These are two very different types of interactions that need to be available through a single interface.

Navigation Menu Approach

The project team sought a navigation approach that would achieve three key goals: allow for a simple set of options to facilitate tidiness and a stress-free UX; be well suited to optimize mobile access; and put more emphasis on search.

Although many companies use megamenus effectively, the EBRD team felt that having too many links in a global nav would deter staff from getting familiar with the new intranet and using its search facility. It also felt that a megamenu approach would lead users to become too dependent on idiosyncratic click paths, which had become the *only* way to get anywhere in the old system. Finally, the team thought a large menu might make the platform feel more complex and less user-friendly than it really was.

Legacy was another consideration. The old intranet had offered a confusing and inconsistent menu structure with numerous options, none of which felt intuitively organized or related to any overall logic. However, staff had grown accustomed to using one of its elements—a massive drop-down menu that offered links to all

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departments at once. This was the most dependable route to navigate the old site, but was also unwieldy and took up a lot of precious screen real estate. While some staff would have happily voted to keep it, the design team knew that doing so would deter people from using the search or from engaging fully with the site and buying into its new structure and simplified approach. So, the new design's ultra-simple navigation was another purposeful step away from the old approach.

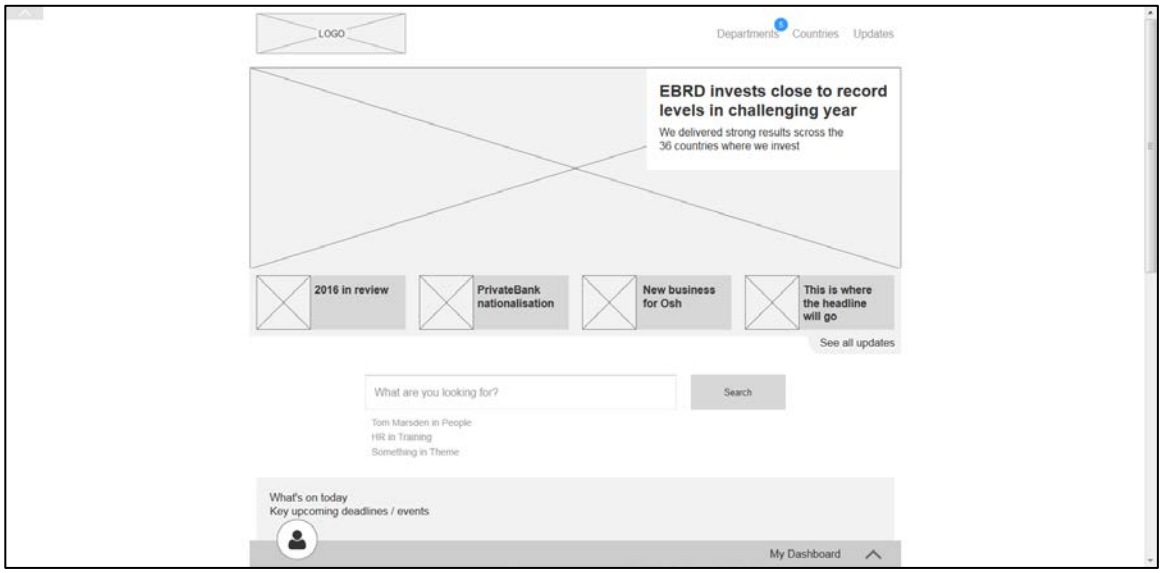


Image 122. EBRD Intranet Homepage Wireframe. This is an example of one of the many layouts discussed during the design phase. During the homepage wireframing process, the team considered more than 20 possible concepts. Getting the homepage right was identified as such a key factor in the success of the new site that it was scrutinized by the project team and user-tested more than any other facet of the site.
122_EBRD_26_homepage_wireframe.png

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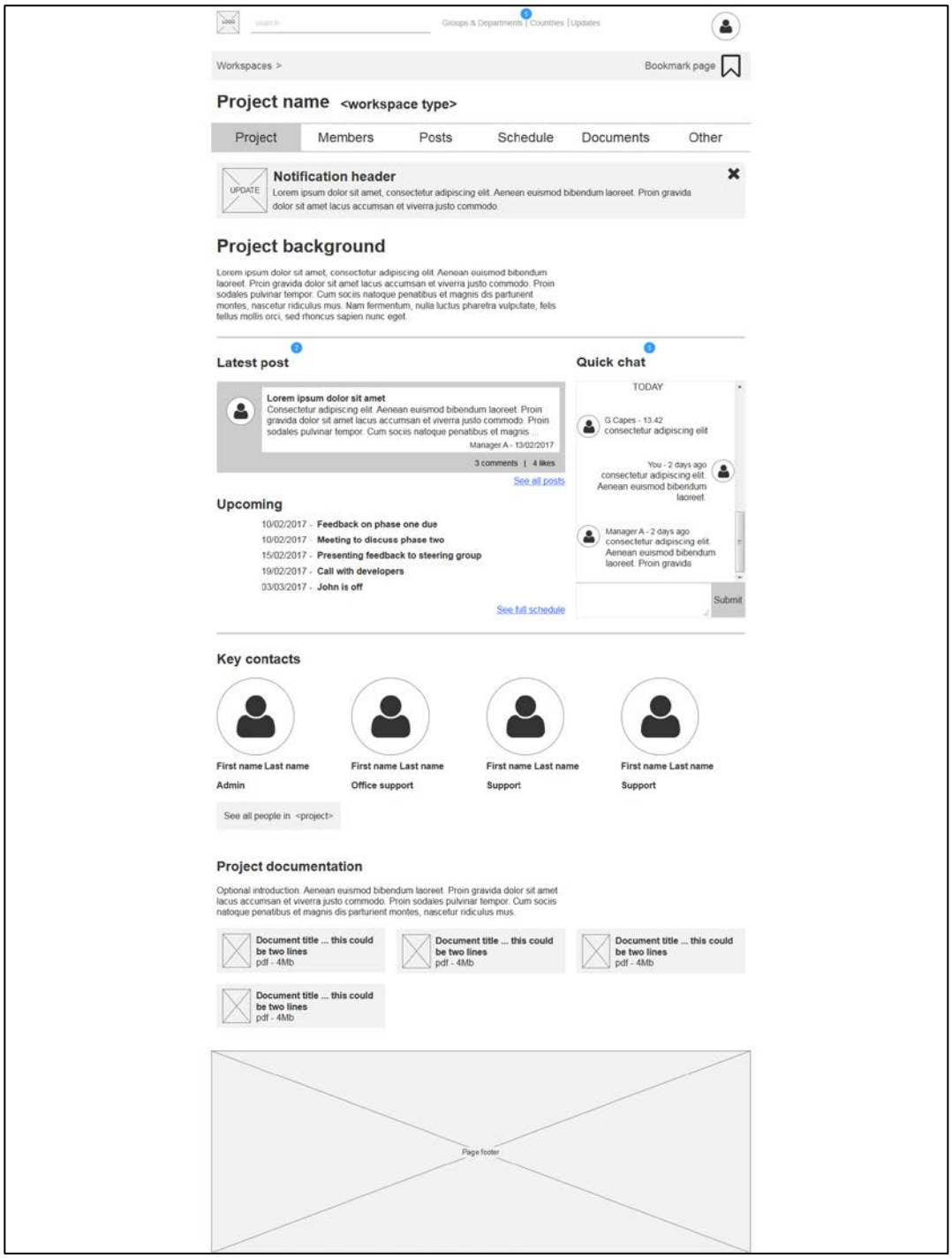


Image 123. EBRD Intranet Spaces Wireframe. A wireframe from the development of *Spaces* (at this point, labeled "Workspaces") shows the higher complexity level in earlier iterations. Simplicity was a vital goal, so the final UI was less complex, had fewer features, and was easier use. *123_EBRD_27_space_wireframe.png*

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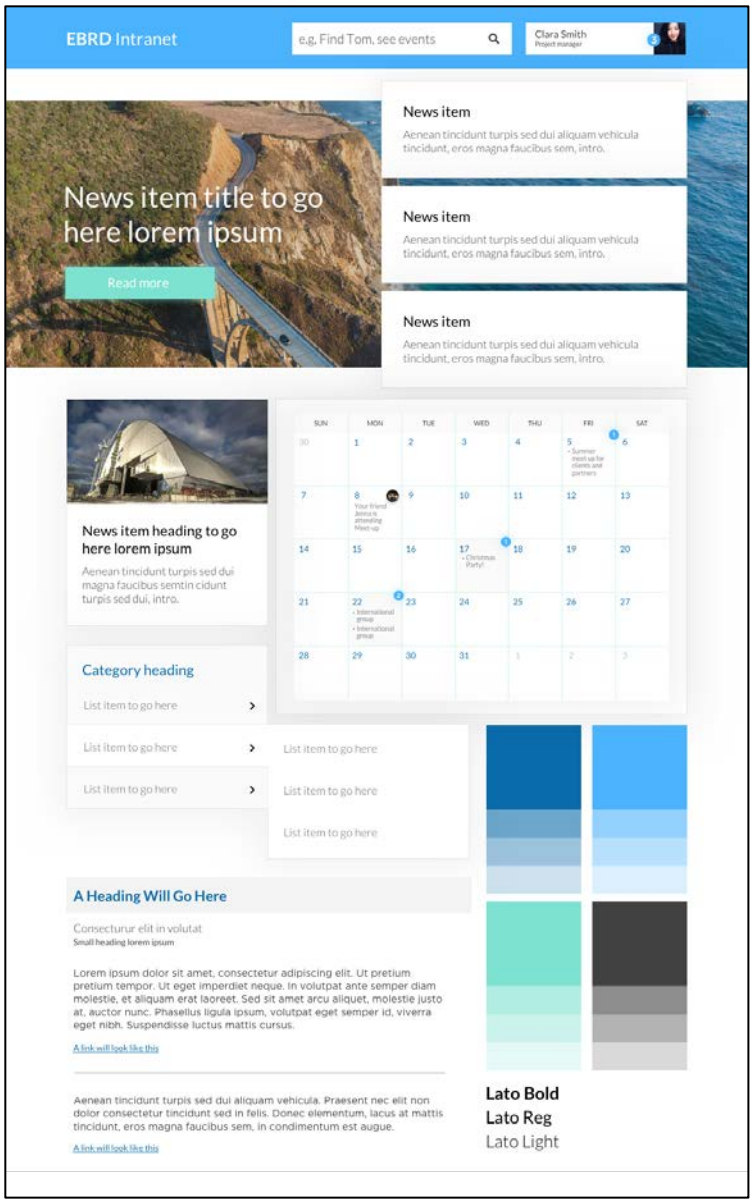


Image 124. EBRD Intranet Early Design Concept. The designers rapidly produced several different design options and user-tested each to get a quick feel for what staff members liked. In this example, a tentative and somewhat arbitrary UI was used because wireframing was happening in parallel and there was not yet a finished layout on which to hang design examples. The project team initially looked at general consistent traits—such as how flat the design was, the size of text, font choice, and the squareness of panels—so that user testing could focus on palettes and the design's general tone and feel. *124_EBRD_28_early_design_1.png*

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Adoption and Buy-in

Adoption and buy-in was probably the area of broadest concern for the project team, yet it was also an area that played out in a pleasantly surprising way.

Having a beta phase was a positive, controlled way of allowing staff members to adjust to the new site without forcing it on them all at once. Allowing them to explore the new platform at their leisure—and on their own terms—optimized the likelihood that they would receive it well, as opposed to simply switching them all over from the old intranet to the new one on launch day.

Further, running so many user tests at each design stage with users from across the organization meant that hundreds of staff members were aware of the project and/or had seen snippets of it. That approach reduced the possibility of shock, created a positive buzz, and reinforced the point that the project team was truly taking staff input into account. Other outreach activities included:

- **In-person demos:** During the beta, the team set up a table in the HQ building's coffee bar area and staffed it with team members armed with laptops—and chocolate. The team members did a demo of the site surrounded by lively digital signage advertising the launch. Staff members could stop by, ask questions, give feedback, and, again, feel that they were being encouraged to engage with the project rather than having it thrust upon them as a fait accompli.
- **Digital signage:** Digital signage was a key method of change management throughout the project. The EBRD has several large screens in its HQ building. Early on, the team used these to run simple teaser advertisements with a save-the-date message referring to the launch day later in the year. As the project progressed, the project team's marketing designer created several eye-catching animated promos for new intranet features to prepare staff for the type and scale of change that was coming. And, during the beta, the digital screens showed glossy explainer videos to communicate the breadth of new features and precisely how to use them.
- **Evangelists:** Another strategy that worked well for boosting adoption rates was an effort to target evangelists among senior staff who would give public support to the project and engage with the new intranet's interactive features early on. The evangelists provided validation and demonstrated to other staff that the new platform was easy to use, was blessed by members of EBRD's upper orders, and was something to embrace rather than fear.
- **Remote staff outreach:** Change management and marketing activities were more challenging when trying to reach RO audiences, who couldn't benefit from the physical marketing efforts in the London HQ. This audience was given a lot of personal contact via all-staff emails in each office, updating them on the project's progress, as well as creating a connection between the project team's content coordinator and the intranet representative at each RO.

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One initiative that proved successful at involving remote staff with the new intranet was a set of competitions that were run to celebrate the beta launch. The first of these was a contest to encourage staff members to update their profile pages. Everyone who wrote a short bio and chose topic tags for their profile was entered into a drawing for a tablet PC. Another contest awarded Beats headphones to the person who did the most to engage with the new platform during the beta phase. The winner was a person who added lots of useful information to his profile page and wrote enthusiastic posts in the weeks following launch.

OUTSIDE AGENCIES	
Agency	**Project Role**
Manifesto Digital A full service digital agency	• Developed UX, IA, and visual design • Ran user testing sessions
VASS IT A full service digital agency	• Developed front-end code, CMS implementation, back-end integrations, technical delivery, deployment

GOVERNANCE

Toward a Decentralized Ownership Model

The EBRD intranet is owned and run by the Communications Department. In the past, this in itself led to perceptions among some staff members that the intranet's main function was as a management mouthpiece, used to broadcast propaganda that the Communications staff were curating.

One of the redevelopment project's goals was to push past that kind of skepticism. This meant that the new intranet had to feel open and uncensored. Letting staff members publish anything they want and comment on what others post diminished the charges of propaganda and increased staff enthusiasm and engagement.

Communications continues to edit the homepage, which is the intranet's central hub. However, because the homepage offers a broad mix of content—and about 70% of it is created by non-Communications staff—the sense of controlled management of news easily dissipates.

Content decentralization was also a factor in the new intranet ownership model. By devolving responsibility for intranet sections and empowering departments to play a much more direct role, the sense of overall Communications ownership further diminished in a positive way. Indeed, the Communications team now seems to be perceived more as a facilitator and coordinator of the intranet than as an owner, which was very much the intention of the project.

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INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Internal Communications Core Team (3)	• Provide editorial ownership • Manage homepage content • Create and publish news items and posts • Provide editorial support for staff who need help writing or publishing content • Provide first-line nontechnical support and basic troubleshooting • Own roadmap for intranet enhancements • Publish CMS content on behalf of overseas offices that lack publishing access
Intranet Adviser (1) and Digital Development Lead (1)	• Provide first-line, nontechnical support and basic troubleshooting • Capture feature requests and manage discussion around queries, issues, and enhancement requests • Liaise with IT to develop new roadmap features • Arrange training and support documentation for business content managers
Business Content Owners (approximately 80)	• Update content in their section/area • Engage with core internal communications team to propose new features or enhancements
Resident Office Content Owners (approximately 40)	• Liaise with core internal communications team to publish content
IT Developers (2)	• Provide technical support/troubleshooting when genuine issues are confirmed • Develop and release new roadmap features in collaboration with Digital Development lead
End Users (approximately 3,000)	• Publish content through the front end • Involve Internal Communications core team for editorial or practical guidance • Propose enhancements and give feedback

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URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	Intranet.ebrd.com
Default Status	The intranet is the default homepage for all staff browsers upon login and cannot be replaced. Also, IE boots automatically upon Windows login, so all staff see the intranet homepage at least once per session.
Remote Access	Users can access the site through the company's Citrix infrastructure. They can also visit the mobile site through either EBRD iPhones or on a BYOD basis, in both cases using the BlackBerry for Work browser.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
1999 (approximately)	• First company intranet launched
November 2012	• Minor redesign to homepage and navigation
September 2013	• WebCenter Sites procured for external-facing websites, with the intention of later use for new intranet
Summer 2015	• Based on the (later thwarted) expectation of starting the project that year, wide-scale staff survey carried out to gather feedback about existing intranet and wish list for a new one
October 2016	• New intranet project green lit and budget agreed
November–December 2016	• Project preparation: recruitment, internal staffing arrangements and logistics, RFP for agency support • Initial top-level user research to capture general ideas and suggestions, development of Axure prototypes to demo early concepts to staff and generally test the water • Agency vendors evaluated and procured
January 2017	• Project begins in earnest
April 1, 2017	• Launch of first iteration of new intranet based on the new *Staff Guide*—a set of pages detailing all rules and regulations about working at EBRD
Early September 2017	• Beta version of full new intranet
Late November 2017	• Beta version of the new intranet becomes the default standard intranet; old intranet (and CMS) retired and available only as a static archive
Overall redesign timeframe: 1 year (including preparatory stage)	

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CONTENT AND CONTENT MANAGEMENT

Contributors

Many dozens of business areas and all ROs are represented on the intranet, and each has a designated intranet representative. These representatives are often those whose main job involves communications, outreach, or working on interdepartmental initiatives; however, intranet work is typically only a very small part of their overall duties.

Intranet representatives are given CMS access and may be joined by one or more other CMS users in the same area depending on need and workload. They're responsible for their own content and are fully entrusted to cover it, keep information up-to-date, and adhere to best practices based on guidance from Communications.

An email group for all CMS users is used for communicating updates, patches, and downtime, along with new features. Substantial enhancements are also publicized on the intranet homepage as news items and sometimes on the organization's digital signage system as well.

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CONTENT DEVELOPMENT AND OVERSIGHT	
Contribution	Likely as a reflection of the new intranet's quality, CMS user engagement is strong and so far has required little encouragement. Further, since launch, several teams that weren't previously involved in the intranet have requested a presence and become directly involved. Departmental intranet representatives have done a good job of keeping functional content updated and have contributed plenty of news content about their area to supplement and keep it fresh.
Training	New CMS users get introductory training, which is always tailored around real-world content needs and takes place only when they first have something to publish. Compared to nebulous full-system training, this approach is more effective as it is tailored to users' specific needs. The CMS is very easy to use, but new users need one or two further ad hoc refresher meetings after the first training. Extensive training materials were assembled for CMS users. One of the benefits of the new intranet and the use of WebCenter Sites is that calls for support have dropped significantly. This extends to general CMS use as well as publishing blockages and other system faults. Things run far more smoothly than in the past. Also, when Communications gets calls now, those calls are almost always for a positive reason, such as users wanting help to improve a section, build a more creative layout, or try something new.
Management	The intranet is new enough that formal processes for governing its maintenance are not yet in place. In time, however, the team will introduce general rules and procedures to politely compel everyone to attend to their content duties. A CMS upgrade planned for 2019 will provide advanced tools to finally enable automated content management auditing as well as track who is publishing what and when.
Maintaining Quality	The Communications team keeps an informal eye on many intranet sections on a daily basis and follows up with departmental representatives if issues are identified. Ultimately, however, there is too much content and not enough resources to truly, formally police the content, so in-page

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	feedback modules on each page are the primary way users can alert the intranet team to content that is incomplete, out-of-date, or unclear. There are also comment forms and a simple *How useful was this information?* module that lets users choose a usefulness star rating for any page. Users have contributed a huge amount of feedback through these tools, so the self-policing approach is proving useful. Longer-term, however, the team knows it must create more formal quality-control measures—a task that remains on the intranet roadmap.

Culling Content

A dedicated content coordinator on the project team was tasked with liaising with every EBRD business team and RO to designate an intranet contact. In some cases, the contact was a person who had interacted with the Communications department to publish content on the old system, but mostly they were newly appointed content owners.

These coordinators were informed about the redesign and encouraged, from very early in the project, to begin considering the content they wanted to include in the new intranet. Staff members were happy to participate in this process and were generally keen to be quite brutal with the submitted content, cutting it down where needed and, in many cases, opting to create brand new content from scratch. As templates were developed, the project team kept staff members informed about available layouts. Those staff members simultaneously participated in the project's UI design process by letting the design team know which formats and UI elements worked for them.

Despite being a mess, the EBRD's old intranet didn't have an outrageously high number of pages; it just felt like it did because the IA was so random and little thought had gone into its development. The problems worsened over the years as neglected pages lived in isolation and business teams often simply parked a fact or a piece of content on a page without thought to its usefulness or visibility. The result was countless pages with just a paragraph or two of content. The key goal, then, was not so much to cull the overall amount of content as to organize the content and create a framework for more disciplined contributions.

To make this happen, the team used three methods:

- **Combine pages:** A right-hand "scrollspy" widget for anchor links was introduced for regular content pages. This made it easier for readers to digest long pages, and thus encouraged business teams to condense several pages into one. In many cases, the project team was able to merge five or more existing content items into a single page, which not only reduced the overall number but also created a more ordered UX.

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- **Dive deep:** Content owners across the business were given extensive guidance and encouragement to look at their content from scratch and take a measured, fresh approach to how they might best communicate the information. By allowing ample time for this activity, content owners had the chance to work in-depth with their respective teams and managers to give each area as much input as needed into the new content.
- **Apply best practices:** By offering guidance on best practices for structuring and writing good content, and delivering in-page widgets that supported a varied layout, the project team gave further encouragement to teams to have fewer pages, but with more information on each. WebCenter Sites makes it easy to apply pre-designed styles to content when it's produced, so content managers can easily add tables, tabbed boxes, step-by-step guides and other in-page UI components to support the production of readable, compelling, and streamlined content.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Apache httpd/2.2.15 • Apache Tomcat/7.0.82
Bug Tracking / Quality Assurance	• JIRA
Design Tools	• Axure, Photoshop, Sketch, Omnigraffle
Site Building Tools	• Java, Javascipt, Angular, Maven, SVN
Content Management Tools	• Oracle WebCenter Sites
Search	• Solr
Other Functions	• Authentication via Kerberos • REST API using Spring Boot • Integration with SAP for staff profile content • After Effects for animated marketing • Brightcove and YouTube APIs for video integration

Replacing Obsolete Technology

EMC Documentum was the platform powering the existing intranet. In the past, it was a robust enterprise-grade system, but it hadn't received adequate support in

many years and would soon be retired by the vendor. Even without that end-of-life status, it would not have been viable to build a new intranet with the old CMS.

Because WebCenter Sites had been in place since 2013 to power EBRD's external websites, building a new intranet with it was the obvious and only choice. The intranet benefitted greatly from the enhanced system understanding that the organization's IT and Communications teams had gleaned from prior WebCenter Sites projects. The intranet implementation of WebCenter Sites was far better organized and executed than earlier website projects, thanks largely to VASS IT's expertise and extensive experience with the platform.

In early discussions and during procurement, a recurring concern was that the kind of social intranet the team wanted—one with lots of front-end interaction and per-user personalization—would not be achievable using this platform; some thought a portal product would be needed to handle authentication and personalization. Others assumed that third-party plugins might be needed for the social components. However, the VASS team insisted that WebCenter Sites could cover everything, and this assertion really paid off. The business owners are now able to manage the whole platform—along with other web products—through one CMS.

Choosing the Right Technology for the Job

Several technology-selection decisions fell into place without much deliberation. WebCenter Sites was the only choice for content management, and SOLR was a part of that, and the SAP payroll system had to be leveraged for staff profile data.

Kerberos was already EBRD's preferred protocol for authentication management, and Angular was a preferred framework for in-house web development and thus became a natural choice.

One of the main discussions about technology use focused on user-generated content elements—specifically, whether *Spaces* and *Posts* should be developed as functionality entirely outside WebCenter Sites, which might allow a faster front-end experience for the staff using them. It was ultimately decided that, for a small trade-off on speed, having those elements developed within the CMS framework would have more advantages and be more efficient. For example, when staff members request assistance with user generated content, the Communications team can access it in the CMS to troubleshoot or develop it.

So, the end result provides vital access for Communications staff to support and troubleshoot UGC. The downside is that when staff members create a post or space, it doesn't go live until the next automated publishing time. Because these times are 20 minutes apart, the delay is anywhere from 1 to 20 minutes. This turned out to be less a concern than expected; few staff members have objected to the delay and there's even been feedback that it's useful in that it gives contributors a small window in which to refine their work before it's live.

The EBRD produces numerous marketing videos and many of these are of interest to staff, so providing video players within the intranet was important. The intranet also needs to show staff-only videos. EBRD's existing video hosting platform was Brightcove, whose API was leveraged to let content managers easily add Brightcove videos to pages. On the homepage, videos can be played in situ—from a promo—and

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users can click on a video and have it play right there in a light box. The team also integrated YouTube, which is a secondary option for video presentation.

MOBILE

Mobile Enough for Now

The new intranet is about 75% responsive—that is, 75% of content is adequately usable on a phone. The team felt that templates adapted to a phone-sized viewport were essential—and mostly achievable as part of this project—but a separate dedicated tablet-size version would be superfluous and not viable.

The more complex templates are not yet fully mobile-friendly, so they remain in the roadmap. During development, the team tried to be sensibly future-aware, and in some cases even managed to apply a mobile-first philosophy. At the same time, in the rush to get the basics covered, it could not justify treating mobile performance as a huge priority because, at that time, internal system use on mobile was very limited and there was no reason to expect an imminent change. Getting things working well on desktop was by necessity an absolute priority, followed by ensuring only the most basic mobile performance.

Mobile Strategy Challenges

Creating a mobile version of the new intranet was challenging because of the uncertainty over an impending IT strategy that could have affected the design approach. The IT department was in the midst of a huge, multiyear transformation and it wasn't possible to know for sure how the intranet would fit into the EBRD's future mobile infrastructure. There had been talk of an Internal Communications app and a refocus around a portal platform, but nothing was at all certain. The safest bet was therefore to simply develop as much responsive functionality as possible in the intranet with a view toward having it work as well as a mobile website. This would mean that staff members could use the intranet from mobile devices as long as they were authenticated into the EBRD network.

Mobile access on the legacy intranet was very limited by the mobile browser used, so there was no legacy mobile experience at all.

In the months after the new intranet was launched, a separate initiative replaced the mobile browser that staff members can use. This more-robust approach, coupled with the new intranet's decent responsive behaviors, has resulted in much improved and more popular mobile usage.

Currently, nearly all of the new intranet can be used adequately on mobile, although complex interactions, such as those in user posts and collaborative spaces, are not really suited to mobile usage. Further, even when the basic mechanics work, some of the mobile UI components are merely satisfactory in terms of UX, so mobile is certainly an area where resources will be focused in the months and years ahead.

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ROI

Success Measured Through Engagement

In keeping with EBRD's new internal communications strategy, the big metric for this project was *engagement*. The project sponsor wanted the new intranet to promote interaction, information sharing, and collaboration in new ways. Given this new direction for staff, setting specific targets seemed unwise as it could take months or years to tease out solid staff engagement and willingness to interact. Instead, the project team set a very informal target of getting 10 posts or *Spaces* by Christmas 2017, which was almost two months after the full launch. The team hoped to achieve this goal by proactively asking senior staff and evangelists to lead the way and participate in the writing.

All expectations were surpassed; by Christmas break, there were more than 150 posts and *Spaces;* a few months later, that total exceeded 1,000. In addition to these published content items, there were many thousands of comments and discussions and likes. People were engaged. Once team members noticed that EBRD's President had been looking at content and clicking the *like* button, it was clear that their approach had paid off and that the previously feared taboos around staff contribution had been overcome.

The new platform has resulted in many other engagement gains, including:

- **Increased senior staff contribution:** The new intranet has also resulted in more content originating from senior staff—and in a format that feels more genuine and elicits a better reception. It is the best of both worlds. User feedback on the old intranet sometimes featured words such as "propaganda" because its news items were centralized, and it felt like management was talking at them. Now that everyone can publish whatever they like, content from senior staff is more warmly received, as it is seen in the context of contributions from people from all corners of the organization and across all staff levels. Content from senior staff also tends to have a slightly different tone of voice now: it's more open and more unifying, and thus is often more accessible.
- **Increased content volume:** The volume of new content had not been a specific target, but the proliferation of staff-contributed material means that the intranet now has dozens of new pieces of content each week. In the past, it would be closer to 5–10—the most that an over-worked team of Internal Communications staff, using a cumbersome CMS, could produce.
- **Better engagement from RO staff:** RO staff, like everyone else, can publish directly to the intranet regardless of location or time zone. CMS access, which RO staff does not have, is no longer a barrier to involvement.

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- **Reduced support needs:** Another KPI—which wasn't formally targeted, but was certainly hoped for—was that support requirements would diminish by moving from a challenging, unstable CMS to a simpler and more robust new one. That has certainly been the case. Calls to both IT and Communications have dropped substantially with the advent of the new intranet.

LESSONS LEARNED & BEST PRACTICES

Members of the EBRD team share lessons learned and best practices from their project experiences.

Lessons Learned

- **Change management is a big deal.** "It's not that the EBRD failed to grasp this. Indeed, the very first person hired for the project was a change management specialist. But while we grasped the importance, we did maybe underestimate just how many facets there would be within the area of change management, and how time-consuming some would be to tackle. It also turned out that many of the trickiest issues, in our case, were offline. The biggest aspects of change management were focused on stakeholder departments that had to come to terms with a lot of new things around content management, as opposed to the end users getting familiar with how to consume and use the new site. End users took to it [the new intranet] with comparative ease (a pleasant relief) but there were many dozens of work streams behind the scenes to cover things as obscure as the terms and conditions staff had to sign to self-publish content, which took a good deal of discussion.

  "And with the new intranet doing so much more than the old one, there were concerns from some departments that it could cannibalize other applications. The project team was adamant this shouldn't and wouldn't be the case, and addressed each of these concerns very carefully, and in some instances these sort of discussions became lengthy."

- **Plan for both failure and success.** "With the project being within a bank and operating in a heavily project-managed fashion, there was plenty of focus on risk mitigation, and we really planned in detail for every possible mishap or problem that could happen. This paid dividends on many occasions.

  "What we entirely failed to plan for was unexpected successes, where user adoption and enthusiasm went far beyond the most ambitious hopes. The big one was posts. Because self-publishing, and sharing information openly, were such new and big concepts within the organization, there was a wide fear, which came up again and again, that 'people just won't use this.' So, we had plans in place to encourage usage, getting a few cheerleaders to demo the feature and guide others, and so forth. It was even a UI consideration: 'How will this template look if we have to pull out the comments module, which is just a wasteland?'

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"But in fact, usage went through the roof. This actually became a problem in a few ways; one was that the homepage design anticipated lots of traditional news stories and the occasional staff post. With a proliferation of posts, the UI felt odd because promos for staff posts had a different look and feel, intended for occasional use, but now they were used several times daily.

"There was also the issue that more use of posts meant more first-line support requirements than had been expected. However easy to use the format was, some staff was wary of using it the first time without guidance. The most 'positive problem' we had was that staff quickly began to demand that posts, which were intentionally made to be ultra-simple (just text and images mainly), should offer more features, like the capacity to embed videos, galleries, and Tweets. So the roadmap was urgently reordered so that such features could be added post-launch."

- **A beta release is a good thing, but be careful.** "The new EBRD intranet had a beta launch two months ahead of the full launch (and eventual switch-off of the old system). This meant the new platform was available to staff, and could be fully used, but the old intranet remained the default main one. This made lots of sense and gave us the chance to detect bugs, capture feedback, and even sneak in some last-minute enhancements. During the beta, we tracked how many staff had looked at it and the numbers were encouraging. Still though, on the day of the full switchover, there was a tsunami of feedback and support requests from the couple of hundred staff that hadn't looked at the beta at all. Again, it's not that this wasn't anticipated, but the scale and impact of that spike was bigger than might have been hoped for. These late adopters also, by definition tended to be a mix of staff that had the least interest in the intranet, and had limited opportunity and/or willingness to devote time to familiarize themselves with it. That meant a perfect storm with this group being the most vociferous and critical audience, making their feedback sometimes more blunt and challenging and all arriving at the last minute."
- **Employ a mix of personalities.** "If there is a brand new team being staffed up, a mix of personalities is really productive. The project team had a wide mix of nationalities, character types, and temperaments, and it created a great dynamic. Having one or two hard-to-please staff can make for a good benchmark. If a proposed feature can win over whoever is the most cynical member of the project group, then it has a good chance of pleasing staff. Also, the more varied the team, the more likely it is to simulate the similarly broad and mixed characteristics of the ultimate staff audience that the new intranet will face."

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Best Practices

- **A mobile-first approach has advantages beyond mobile.** "It's unoriginal, but a mobile-first mindset can never hurt, even if you are an organization, like ours, where the intranet is still used overwhelmingly on desktop PCs. If you consider mobile first, you not only have the responsive site falling into place in a streamlined fashion, but you are also forced to give more attention to simplicity and ease of access, and to boiling down UI interactions to a really usable level."
- **Choose agency partners with care.** When selecting agencies, take into account whether or not they can adequately do the following well:
    - **Handle design as well as development with equal skill**: "Otherwise, consider splitting the two elements like the EBRD did and working with multiple agencies. Development-centric houses may or may not have in-house design resources as good as that of smaller, more design-centric agencies. The EBRD's experience was that managing two agencies at once didn't create problematic extra overheads and yielded great results. It also brought a wider and more diverse set of personalities to the project, which meant more collaboration, ideas, and originality could be shared."
    - **Understand the real differences and nuances of an intranet vs. an external-facing site.** "Some agencies are a lot better at this than others. An intranet is not simply a regular website that's viewed within a company. There's a lot more to it than that, and not all agencies necessarily appreciate the sensibilities."
    - **Be engaged with the organization as much as possible:** "When agencies want to work on-site, ask how many staff they'll be able to do tests with, and make an effort to truly understand you—the customer—then they're the ones to go for."
- **Give user testing a seat at the table.** "Testing should be engrained in the project and something that the whole team is focused on and supports throughout. Whether it's as a large formal round of testing for an IA approach, an ad hoc straw poll of a few people about a color palette, or a case of accosting a few staff in the coffee bar to test an Axure prototype of a widget, it is invaluable to get feedback at every possible opportunity. An intranet project has an advantage versus an external-facing platform in that you have easy access to your actual audience. The downside is that they are going to be more demanding because the intranet is vital to their day-to-day work and they can't tolerate anything that inhibits or slows them. They also know your name and can find you to provide frank feedback whether you seek it or not, so it's best to hear their views early on. By testing you cut down the chance of producing anything that risks not meeting your audience's needs."

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- **Resist the temptation to design overly complex UI widgets**. "Our UX lead was violently opposed to carousels and was determined not to have any UI component that involved having to make effort to find hidden content. It was the right choice, and we can in fact display far more content now on the homepage screen than in the old carousel-heavy intranet."
- **Encourage project staff to also give input in their capacity as end users.** "Aside from third-party contractors, those working on the project are going to be audiences of the intranet as well its creators. So foster a working environment where they are encouraged to keep giving feedback on that basis, and have a mindset of both working to support the end user and considering themselves one of those end users."
- **Adopt an Agile project management approach.** "Agile project management made complete sense for the EBRD's intranet redesign and is easy to recommend, as long as you are realistic about the way to deploy it and align it sensibly with the nature of the project. In our case, several 2–3 week sprints were implemented in the early stages, in heavily governed fashion and using all the processes and roles of Scrum.

  "Beyond the core early development and first release, it then made sense to keep doing sprints, but in a fashion that became more free form, with an eye toward Kanban. Later in the project, the activities again called for a more governed approach, so the format became a bit more disciplined/formal and Scrum-like again."
- **Think about governance from the very beginning.** "Establish what the end point for governance will be, especially if it is different from what went before. Also consider how the new intranet will be managed and developed once the redesign project comes to an end. Don't let this be an afterthought.

  "In the EBRD's case, advance planning for the governance and management aspects was very difficult for various reasons, particularly as key departments were undergoing many changes in tandem with intranet redevelopment. But with even a partial picture of who would work on the finished intranet and in what capacity, who would own it, and how development management and resourcing would work, it was possible to plan more effectively to support that.

  "A redeveloped intranet can achieve many things but [those achievements] have to be sustainable and align with the way the organization works, and particularly the position that the intranet occupies within it. This is critical for the intranet to be a long-term success. Good agencies will get this point, too, ensuring they work toward a model that can operate in the future rather than simply check boxes in the short term."

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- **Don't underestimate the scope and effort required for change management.** "Be aware that resistance or skepticism can come from any quarter. Don't fall for misleading clichés, like the assumption that older, more senior staff will resist and struggle with change and younger colleagues will automatically embrace it. The picture is complex. Also be prepared for any aspect of change management to become a major issue, while conversely you may be pleasantly surprised when anticipated challenges blow over.

  "Above all else, target a scenario such that when your intranet launches, however good or bad the audience decides it is, they feel like they had a fair level of input into shaping its development."
- **Provide strategic ways for users to give feedback.** "It's imperative to offer end users a clear means of giving feedback and support requests, both on a general level and in relation to individual pages or features. A dedicated email account is perhaps the bare minimum, however, it's also important not to go too far. Arguably the EBRD project team designed too many different ways for staff to give feedback, by having in-page star ratings, an in-page feedback form, an inbox, a helpline, and also a web-form in the footer. Streamlining these and reducing the options (which we did post-launch) was conducive to a more streamlined and actionable flow of feedback."
- **Get the CMS right, and know how to use it.** "We were fortunate to use WebCenter Sites, which is a great platform and served us well. I don't think the results would have been as good, however, if this had been our first project using the platform. We'd learned how to get the best from it over the course of a few years and could apply that in the implementation of the intranet. So a worthwhile bit of advice might be that intranets—which are by definition ultra-high visibility and therefore high pressure and risk-laden—should use a system you're robust at using, not one being brought in for the first time."

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Flight Centre Travel Group

OVERVIEW

COMPANY

Flight Centre Travel Group is the world's largest independent travel company, specializing in vacations, tours, and corporate travel. With more than 19,000 global employees, Flight Centre serves its customers online and through more than 2,800 retail outlets in over 90 different countries across more than 40 different sub-brands. Founded in 1982 in Brisbane, Queensland, Australia, Flight Centre takes pride in its expert travel knowledge and excellent customer service.

Headquarters: Brisbane, Australia

Company locations: More than 2,800 retail outlets in over 90 different countries.

Locations where people use the intranet: 44 locations across the UK, with plans to roll out across the EU; after that, plans are in place to carry out a global rollout.

Annual sales: EU: £1.32 billion; globally: £11 Billion

THE INTRANET

Users: The intranet currently serves an initial group of 1,892 users across 130 locations. These users need access to accurate information on the latest travel offers, local expertise, and travel information from anywhere in the world. Users span sales, operations, finance, marketing, and travel consultants, all the way to the leadership team.

Mobile approach: Responsive web design and a dedicated IOS and Android app

Technology platform: Unily

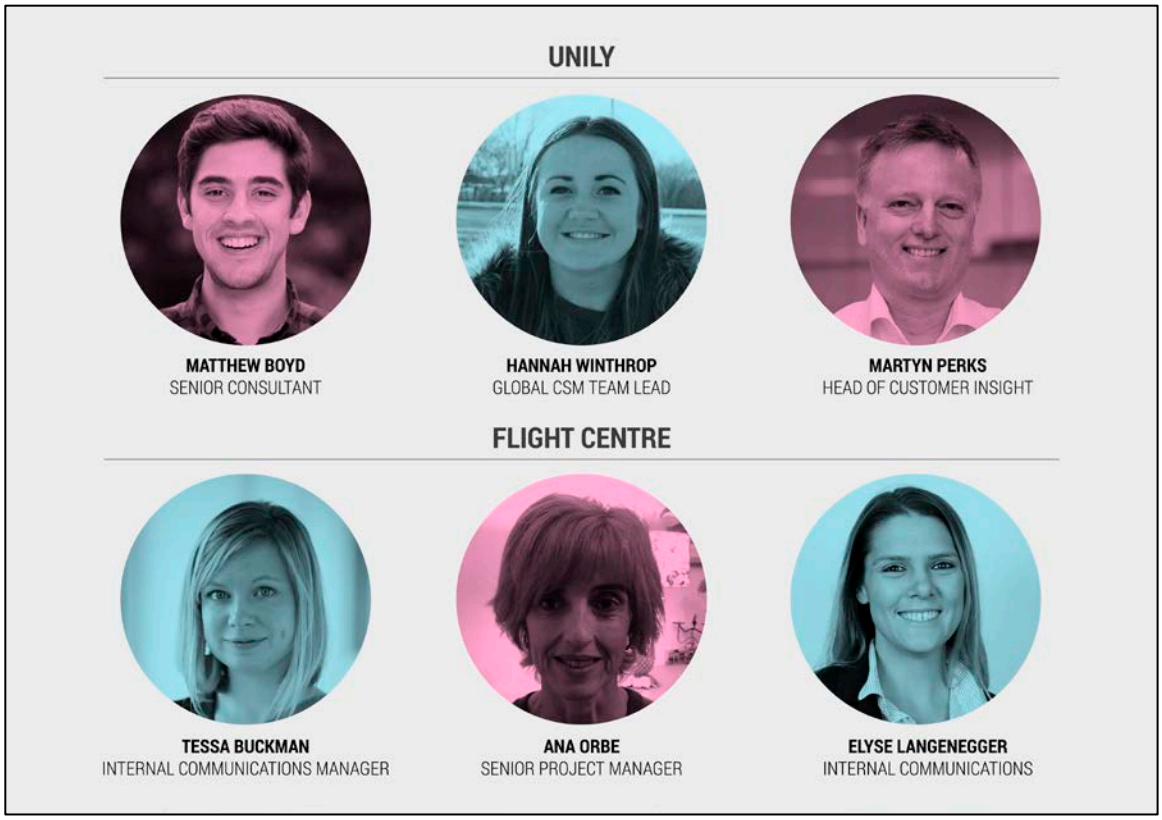
TEAM

Internal team: Tessa Buckman, Head of Internal Communications; Elyse Langenegger, Internal Communications.

Unily (formerly BrightStarr): Matthew Boyd, Senior Intranet Consultant; Hannah Winthrop, Team UK Lead, Customer Success Manager.

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INTRANET TEAM



Team members shown here (top row, left to right—Unily): Matthew Boyd, Hannah Winthrop, Martyn Perks; (bottom row, left to right—Flight Centre): Tessa Buckman, Ana Orbe, Elyse Langenegger.

HIGHLIGHTS ABOUT THIS WINNER

Information and tools on the Flight Centre Travel Group's *PILOT* intranet truly support employees' needs. Administrative tasks, sure; but also the nitty-gritty little things that make a one-of-a-kind intranet—like knowing when any global incident occurs that might impact customer travel, or finding resources that a trusted teammate deemed valuable.

- **Content that supports jobs:** In numerous places, the intranet's information supports the way Flight Centre employees work. One of the more interesting examples is the site tracking and the way the site facilitates communication of world events that could cause or have already caused travel interruptions. Knowing this information helps employees start to deal with potential issues long before customers begin to contact them.
- **Applications and tools:** Employees can access business tools and applications on their list on the targeted homepage. Also, an application search feature makes it possible to find apps not in their list. This puts PILOT at the center of Flight Centre's digital workplace.

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- **IT:** A combination of simple self-service options and one-to-one assistance make it easy for Flight Center employees to quickly unravel any technology knots. The IT system status information, accessible from the homepage, makes it easy for IT to inform all employees about system outages. It also helps employees find information to simply solve problems on their own.
- **Perks:** The team made a smart move and a killer app all at once with the *Travelwise* feature, which lets employees access many special travel discounts. Once this feature went live, usage took off and has never come down.
- **Employee search:** Exhaustive metadata, filtering and sorting options, and attractively presented results make searching for colleagues as pleasant as going on vacation. Skype for Business integration expedites one-click calling right from the search results.

BACKGROUND

Flight Centre has been offering advice and making travel arrangements for customers since 1982, when it opened its first store in Sydney, Australia. Today, 36 years later, it is one of the world's largest and most successful independent travel retailers. As the company has grown, so has its need for effective two-way communication, knowledge sharing, and seamless collaboration between globally dispersed employees in various job functions. To support Flight Centre's objective of delivering superior travel experiences, a new intranet was implemented to:

- Bring together employees working across seven different travel sub-brands in the UK.
- Give them access to accurate, real-time information to improve the quality of their customers' experiences.

Flight Centre's vision for its new intranet project was to deliver a digital workplace platform that would let users quickly find accurate information wherever they are, from any device.

The platform offers a highly engaging UX while distributing expert travel knowledge to users in a timely and highly relevant manner. Content targeting allows content owners to ensure that the most relevant information reaches the right people based on their location, function, and brand. Employees now have quick and easy access to SMEs, which lets them unlock tacit knowledge from around the business. In addition, all of Flight Centre's business applications have been integrated with the platform in a security-trimmed manner, so users are one click away from all the business applications they need to do their jobs. Since launch, the platform has reduced emails by 88% with 97.5% of staff active. From May to June 2018, usage soared, with 12,085 profile searches, 195,858 views, and 48,593 sessions across the platform.

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DESIGN REVIEW

Homepage

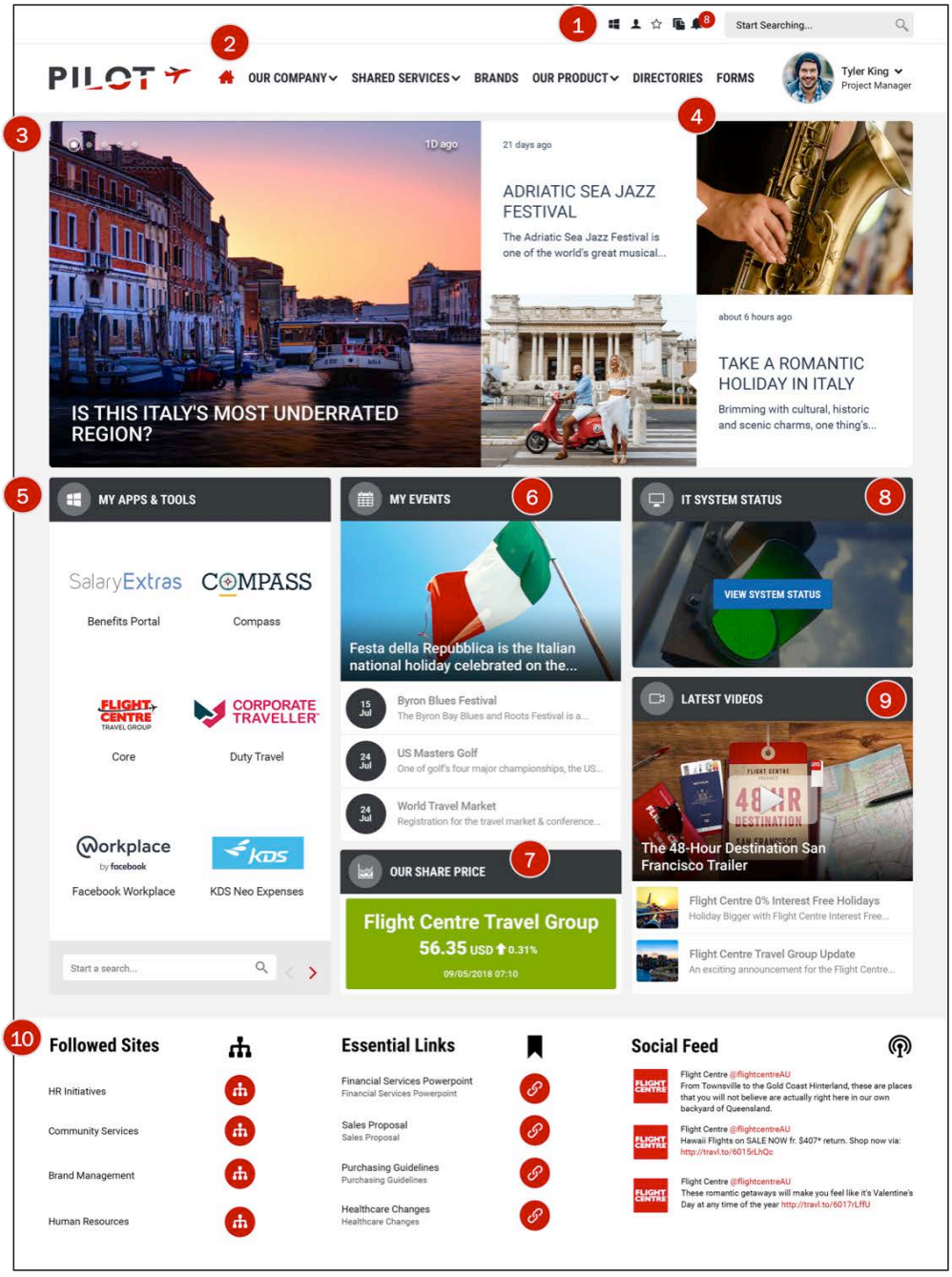


Image 125. Flight Centre Intranet Homepage. The homepage on the Flight Center Travel Group intranet presents a lot of information in a scannable, low-pressure format. *125_FlightCentre_01_Homepage.png*

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Homepage, Highlights

The Flight Centre Travel Group's intranet homepage aims to target the best and most current information to each employee. PILOT displays homepage news, events, and videos based on the logged-in user's location, business, and function at the organization. This role-based approach makes the vast amount of content produced across the organization manageable. It also makes it possible for the Flight Center's diverse user population to be effective using the same tool.

The PILOT homepage's visual appearance is lively but uncluttered. The subheadings for each section include large white text on a grey background. This consistent visual treatment makes sections easy to decipher.

1. **Utility navigation:** The search field appears in the far upper right of the page, along with a few icons. These icons let users open a menu of their applications, find employees, access their favorites, open the document find page, read alerts targeted to them, and mark content as a mandatory read. The global search has extensive functionality including: search the overall site, documents, policies and procedures (through the SharePoint site), applications, people, teams, and suppliers.
2. **Global navigation:** Six level-one topics appear as the global navigation links. A professional-looking site logo appears to the left of the global navigation, and the logged-in user's picture and name appear to its right. Here, users can open a menu of their applications, personalize the intranet with their chosen topics, favorite a page, and access their favorites and read alerts targeted to them.
3. **Top news item:** A top news item, which might have either a global or local focus, appears in the upper right on the homepage. The large attractive image gives a sense of the topic and draws employees in, while the article's title appears in legible text. The article's time since posting also appears in small letters on the image to show how current the news is.
4. **Other news:** Two more news items seize the space to the right of the main image. Each of these items has a smaller, but still attractive, image; a large title in all caps; a short sample of the article's text; and the time since the article was posted.
5. **Applications and tools:** The *My Apps & Tools* section brings to the fore the business tools and applications—from O365 and other sources—that logged-in users need. Having these at their fingertips can only help employees be more productive. Users can also easily find more applications not on the homepage by using the application search feature at the bottom of this section. This feature opens a world of applications to all employees.
6. **Events:** The *My Events* area displays upcoming events relevant to the logged-in user.
7. **Stock price:** At the request of the senior leadership team, the company's stock price appears on the homepage in the *Our Share*

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Price section. The current share price appears in large white bold numbers. To its right, an arrow shows whether the price is up or down, and a number indicates how much it has moved. The information is kept current, updating every 15 minutes. Displaying the stock price helps promote employee awareness about the organization's performance.

8. **IT:** The homepage's IT section*, IT System Status,* provides a link to the IT service page. The blue button offers a call to action: *View System Status*. IT system status may not seem like something employees often need, but once they click it, they see an overview of the real-time status of all business systems. So, if users are wondering if an application is having issues, they no longer need to call IT or look for an email announcement to find out. This feature also eliminates the need for IT to send out service status email notifications (which were previously sent every 15 minutes when a service was having issues) or answer support calls about down apps.
9. **Videos:** The *Latest Videos* section includes the top three videos, with one more prominently displayed than the others. The videos displayed are based on the logged-in user's role. Clicking on a video allows the user to see the video archive.
10. **Footer:** The page footer includes three columns of links with large bold black text for the subheadings. *Followed Sites* lists links to four PILOT areas that most users choose to follow. *Essential Links* lists links to four initiatives, processes, or announcements that all employees should know. The *Social Feed* column displays the three most recent tweets made on the recent@flightcenterAU Twitter account. This helps keep employees apprised of what the organization is putting out to the public. The page's footer area is subtly distinguished from the rest of the page visually by the absence of grey page background and a different subheading text style.

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Homepage, Mobile

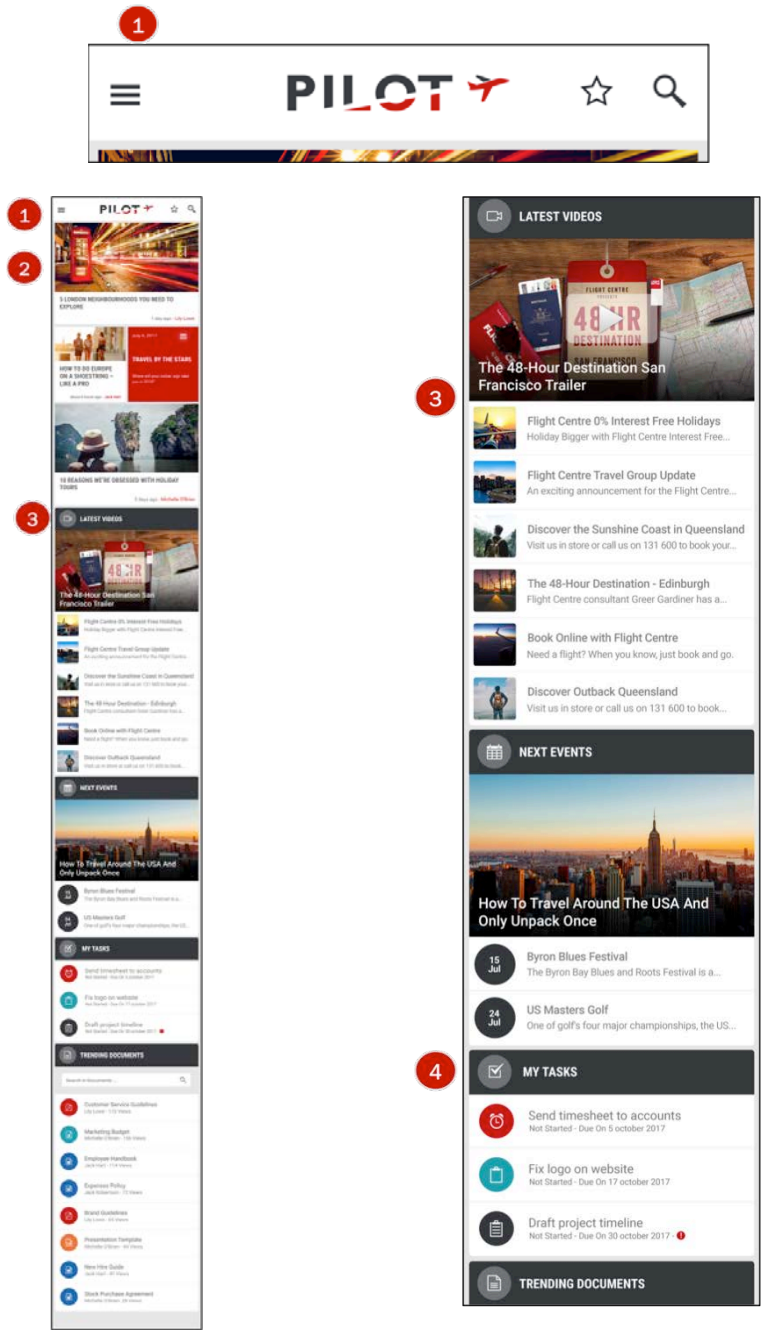


Image 126. Flight Centre Intranet Mobile Homepage. The mobile homepage features include social, documents, apps and tools, news and insights, videos, and photos. *126_FlightCentre_02_Mobile_Homepage.png*

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Homepage, Mobile Highlights

Mobile access was clearly important to the PILOT design team, and the intranet works well when accessed on mobile devices. Employees in the 114 retail outlets and corporate locations across the UK especially benefit from having mobile access. While many desktop features work on mobile, some are not available because the mobile content set has been specifically selected from all available desktop content. On the flip side, some content that is not exposed on the desktop homepage is exposed on the mobile homepage.

Further, to create the best possible mobile UX, the position of the features on mobile is different than on the desktop. In the CMS, content managers can select which content and functionality should be on mobile. Also, employees have the option to download the mobile version as a native app for iOS and Android. The mobile app is designed for traveling consultants; it targets information accordingly and is easy to navigate.

1. **Navigation:** On mobile, the utility navigation is pared down and displayed on the same horizontal line with the global navigation menu. The global navigation is collapsed in a hamburger menu, the logo appears in the center, and a search icon and favorite icon are the only utility navigation items.
2. **News:** As on desktop, the mobile homepage displays four news items near the top of the screen. Their layout—width and text placement—is altered to fit the mobile screen.
3. **Videos:** The *Video* section displays more videos on the mobile homepage than the desktop homepage, as the team felt that employees are more likely to watch videos when they are on the go.
4. **User tasks:** The *My Tasks* section appears on the mobile homepage but not on the desktop one. This section lists the logged-in user's to-do items, along with each one's title, status, and due date. Exposing these on the mobile home screen helps employees stay on top of their work.

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Employee Benefits

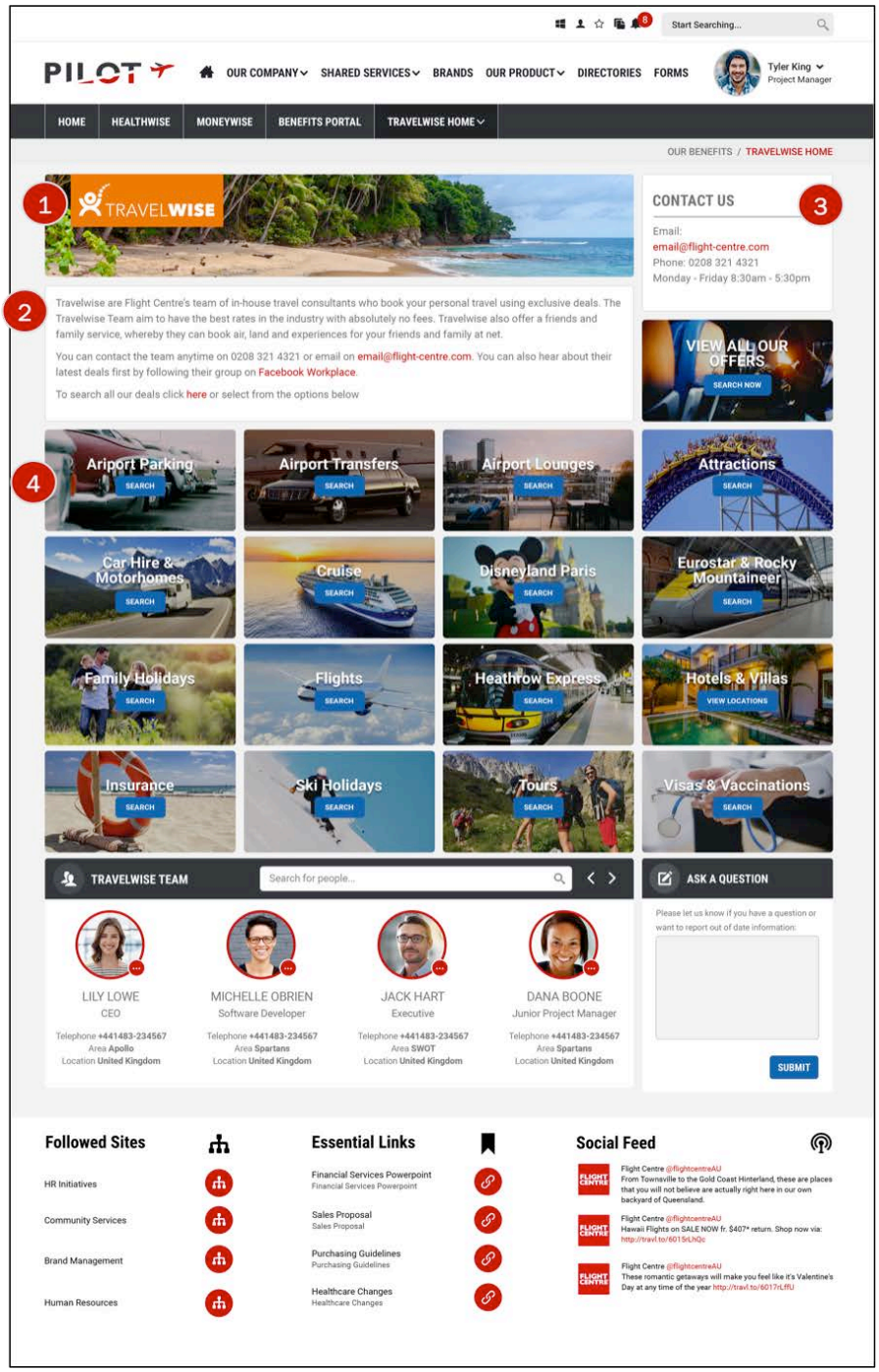


Image 127. Flight Centre Intranet Employee Benefits. This screen shows how Flight Centre showcases a beloved employee perk—discounted travel—on its intranet. *127_FlightCentre_03_Travelwise.png*

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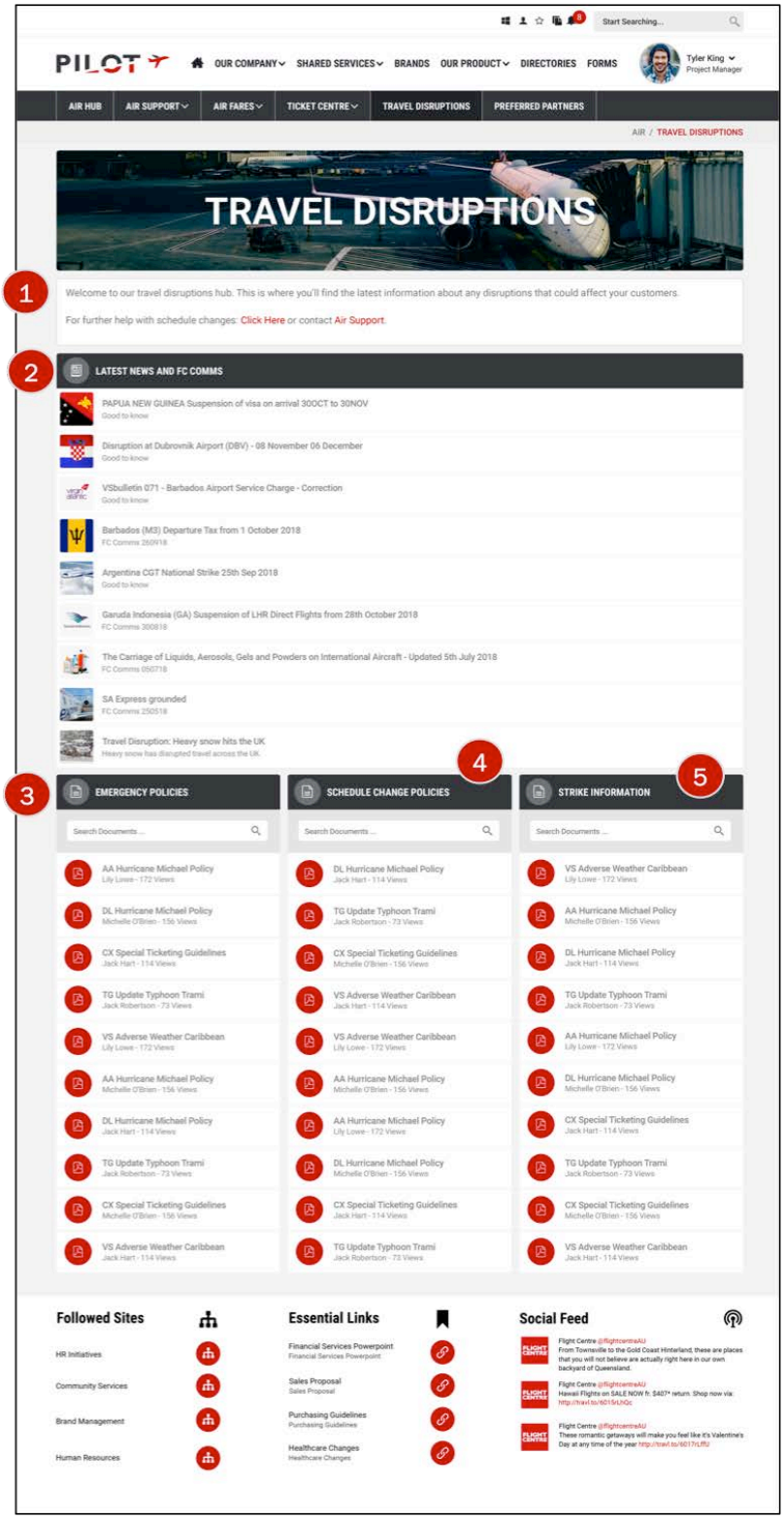
Employee Benefit, Highlights

A treasured perk for Flight Centre employees is discounts on travel and vacation packages. Because the intranet team knew that accessing benefits and perks on the intranet is always popular, it created the *Travelwise* feature. This feature offers easy access to discounted travel and, as predicted, it is a huge success and has resulted in record-breaking employee purchases—as well as an upsurge in intranet engagement.

Airlines around the world give Flight Centre product teams the latest information. This is fed to the Travelwise team, which uploads the information to the intranet. This information also syncs to other business applications, such as Facebook Workplace. This ensures fast delivery of accurate information to employees.

1. **Hero:** The section title appears on an image that would make most people want to go on vacation: an empty beach scene with blue water, green trees, and gentle waves.
2. **Description:** The description communicates that employees get the best rates here, and that they can book travel for friends and family as well. A phone number, email address, and Facebook link round out the information.
3. **Contacts:** Email address, phone number, and hours appear in the upper right.
4. **Search cards:** Cards on the page offer various travel types and categories, including *Cruise, Airport Parking, Flights, Tours, Insurance,* and *Visas & Vaccines*. No wonder employees love this benefit—it offers everything a person could want and it's easily to find on the intranet. Clicking any of the buttons leads users through sets of questions to help them home in on their best travel deal. For example, users looking for flights to Budapest click on the blue button in the *Flights* section, which presents them with countries. Once they select the country, they are presented a results page with the *flight* and *Hungary* filters applied.

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Travel Disruptions

Image 128. Flight Centre Intranet Travel Disruptions. This section informs employees about events that could impact customer travel plans. *128_FlightCentre_04_Corporate_travel_Disruptions.png*

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Travel Disruptions, Highlights

It's imperative that customer-facing employees are aware of anything that might affect their clients' travel. Although the company's customer support sites also have the latest information on travel disruptions, employees can find this information on the *Travel Disruptions* page.

1. **Summary:** The top of the page displays the title, along with an image of an airport worker directing a plane. The image is interesting and gets the point across, without being too sensational. A short welcome message confirms that employees should look here for the latest travel disruption information.
2. **News:** A few news items about travel disruptions—such as those related to an airline, airport, or new TSA policy—appear in *The Latest News* section.
3. **Emergency-related travel disruptions:** This is the first of three columns of information about current disruptions. Emergencies such as inclement weather or equipment malfunctions appear in the *Emergency Policies* area. Users can also search for these.
4. **Disruptions related to schedule changes:** Schedule and route changes appear in the *Schedule Change Policies* section.
5. **Strike-related travel disruptions:** Many jobs in the air travel industry are unionized and employees sometimes go on strike. These events are communicated in the *Strike Information* column.

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Applications

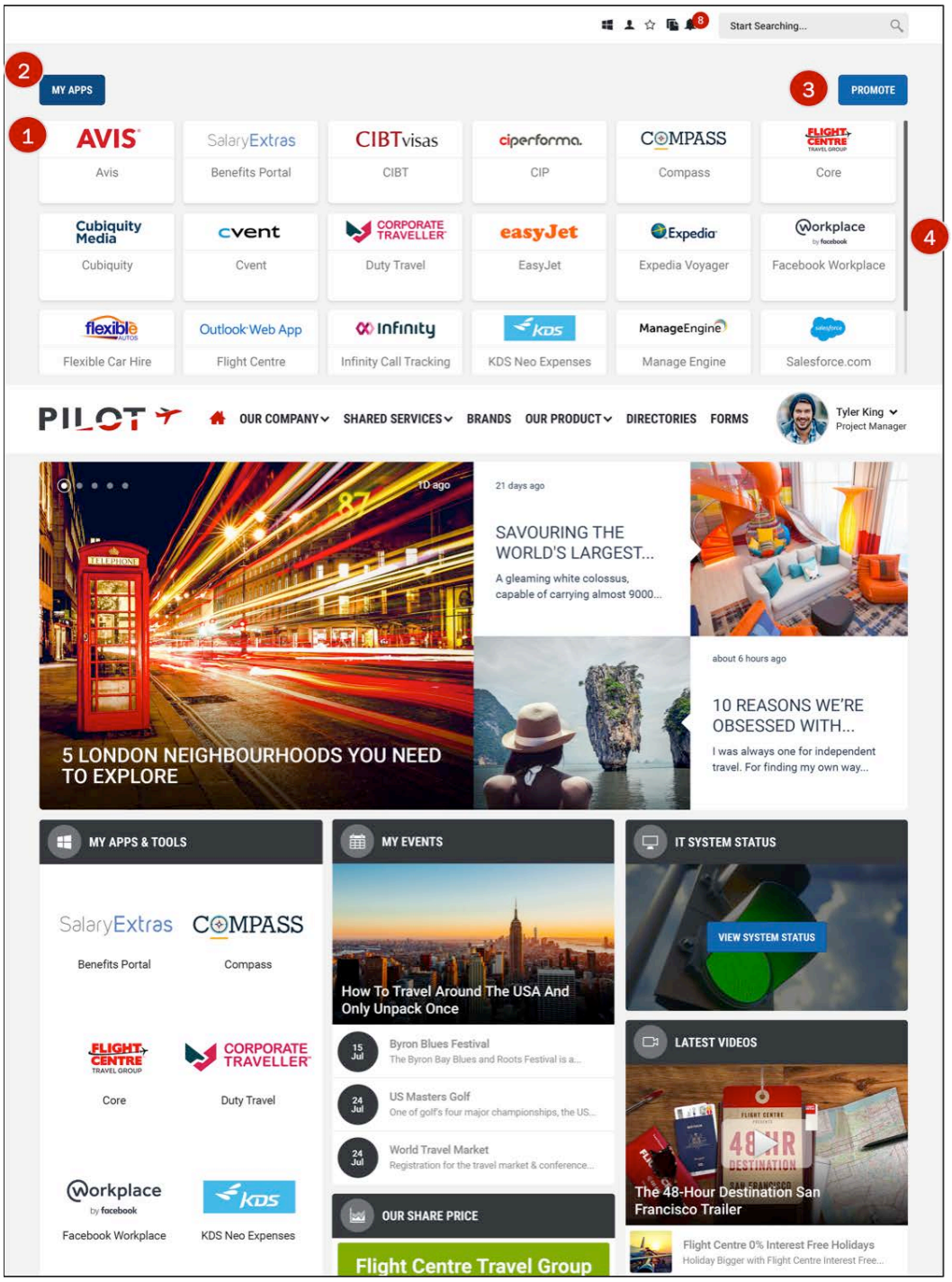


Image 129. Flight Centre Intranet Applications. The applications and tools menu acts as an entryway to Flight Center's whole digital workplace. *129_FlightCentre_05_Apps_and_Tools.png*

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Applications, Highlights

All company applications and tools are accessible via PILOT. Employees can get to these either via their homepage applications section or the small icon on the far left in the utility navigation. (The intranet team can also add apps in the *Essential Links* section in the footer.) Clicking that small icon opens a large scrolling menu of apps. Users see only applications they have access to, which keeps the menu from becoming unnecessarily unwieldy.

1. **Applications:** The menu displays a set of buttons leading to several applications. The application's name and logo appear on each button.
2. ***My Apps*:** When a user clicks the blue *My Apps* heading, it shows a page of all the user's applications, as they are security controlled.
3. **Promote:** Users can change the application order by clicking the blue *Promote* button. This lets users promote any of their apps to the global homepage for even quicker access. Once promoted to the homepage, apps appear in alphabetical order.
4. **Scrollbar:** The scrollbar position indicates that there are more applications to see.

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Employee Directory

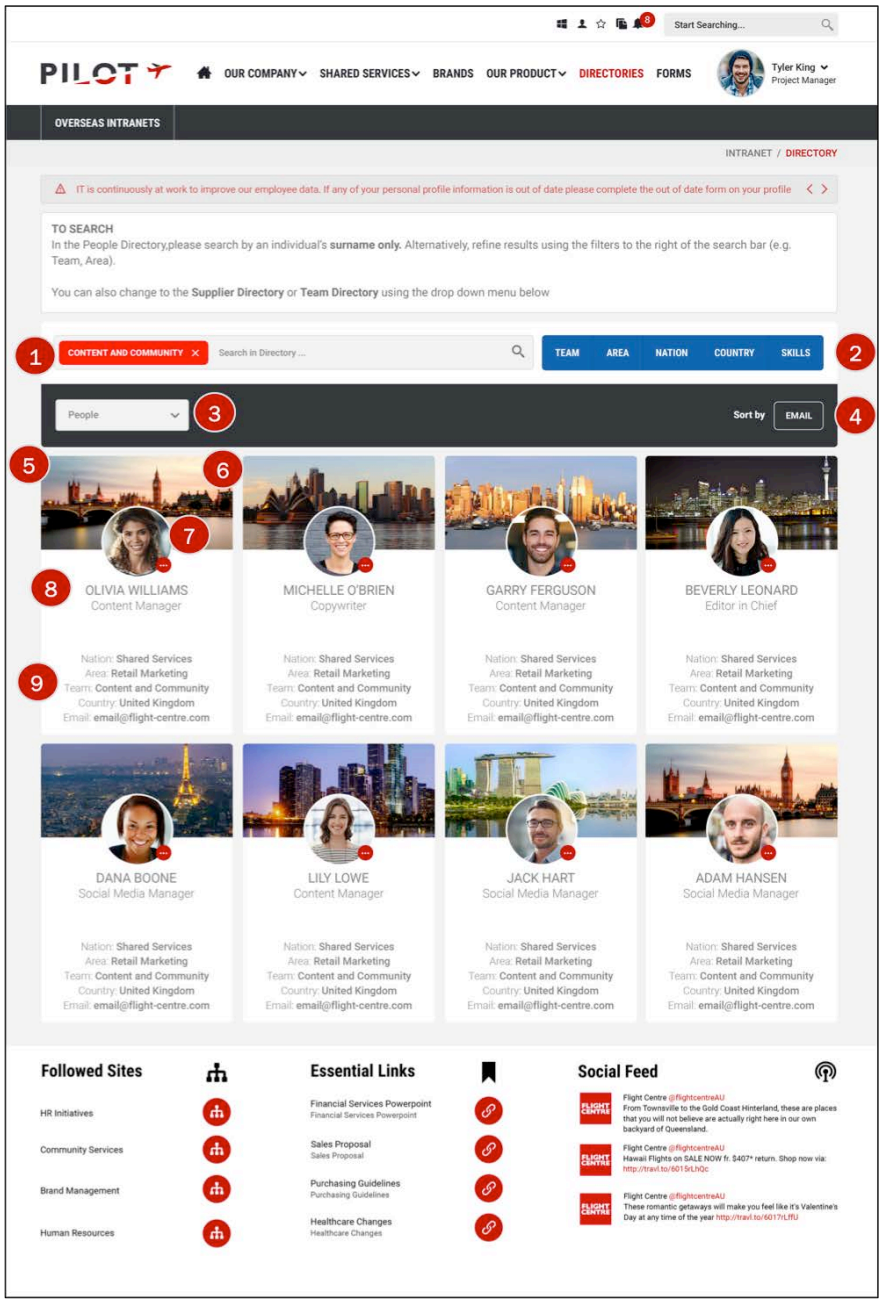


Image 130. Flight Centre Intranet Employee Directory. The employee search offers many filtering and sorting capabilities. The employee results provide plenty of information to help people move forward. *130_FlightCentre_06_People_Directory.png*

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Employee Directory, Highlights

Employee search, accessible from the utility navigation, is a wonderful way to help employees find and connect with one another. On PILOT, the capabilities make it easy for the company's 2,000 global employees across 12 different travel sub-brands and support service areas to find and get in touch with one another. Search, sort, and filtering features help ensure that the right colleagues appear in the results. Also, as the user types, the search utilizes predictive responses and displays suggest search queries.

1. **Search:** The search field at the top of the page lets users search by name to find coworkers.
2. **Keywords:** To the right of the search field, five buttons—*Team*, *Area*, *Nation*, *Country*, *Skills*—act as drop-downs for keywords related to each topic. The user can use these to search by the suggested criteria.
3. **Filter:** In the black horizontal bar below the search field are sorting and filtering features to help users manage the results. This filter switches between a directory of employees, suppliers, and teams within the business. Each one has contact cards (like the people one above it), but with content pertinent to that directory type. For example, the supplier directory displays supplier name and status (such as gold), and each supplier and team also has its own landing page. A drop-down menu on the left lets users filter by elements such as *people* or *locations*. With this, they can see only the kind of results they are interested in.
4. **Sort:** On the right side of that same horizontal black bar is the *Sort by* option. This lets users manipulate the search results and change their order by sorting them by a particular criterion, such as name or email address.
5. **Cards:** The information for each employee that appears in the results is in a card. These cards contain enough information to accommodate many users' needs, so they don't need to open a profile document.
6. **Location image:** A nice visual, information-rich touch comes in the form of the card background image: a fetching photo of the city skyline of each user's location. Details like this are part of what makes PILOT a winning design.
7. **Photo:** Each card display's a clear, close-up photo of the employee.
8. **Name and job title:** Next to the photo, in large all-cap letters, are the person's name and job title.
9. **More information:** Users don't need to look far to find the person's phone number, department, email, and location at the bottom of the card.

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One-Click Skype in Employee Directory

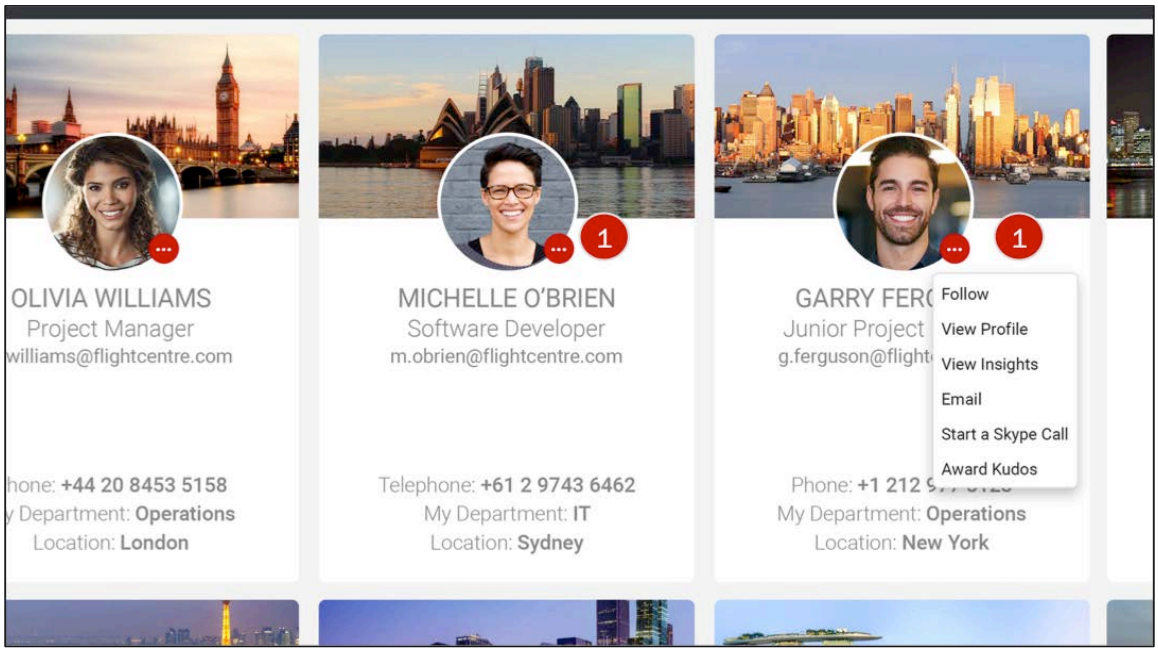


Image 131. Flight Centre Intranet One-Click Skype. Skype for Business integration allows employees to initiate a Skype call right from the employee search results page. *131_FlightCentre_07_People_Directory_Skype.png*

One-Click Skype Highlights

The PILOT team integrated Skype for Business into the employee directory, knowing that it would accelerate communication between coworkers. Employees make use of its features, including instant messaging and one-click calling.

1. **Menu:** Clicking the small red dot icon on the employee's photo opens a context menu from which users can initiate a Skype call. This eliminates having to find the person in Skype—a nice time saver. From this menu, users can also do various other tasks, such as email or follow people and see articles/insights they have written. Finally, *Award Kudos* lets employees recognize one another for a job well done.

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Employee Profile

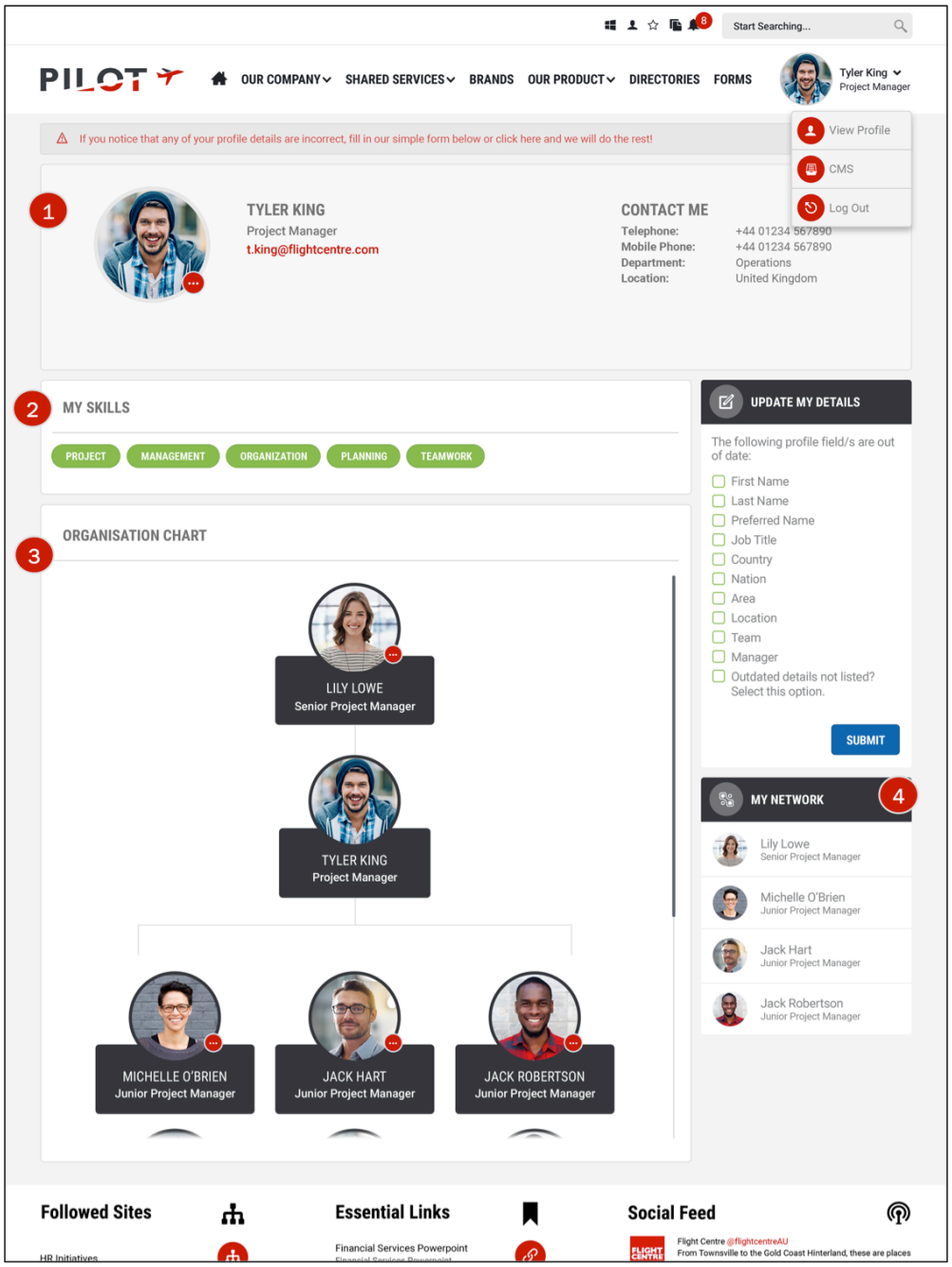


Image 132. Flight Centre Intranet Employee Profile. The employee profile shows detailed information about employees, including: *About me*, social information, insights they have authored, social activity, and a tree structure of where they fit within the organization. *132_FlightCentre_08_Profile.png.*

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Employee Profile, Highlights

The PILOT employee profile design is brimming with information about employees and ways to contact them. Seeing a person's topics of interest and connections helps employees find other interesting content and people.

Users can edit some sections of their profile, including their skills, summary statement, and languages they speak. Other sections are automatically filled in. Profiles sync data with an employee database (Azure AD) to ensure consistency.

1. **Summary and contact:** The employee's photo, name, job title, and email address appear first in the profile document, as this is the main information many users want to know. To the right are the person's landline telephone number, mobile number, department, and location. But that's not all. In this same grey-backgrounded introduction section, users can also access (via the small red circle icon) a menu with various options including initiating a Skype call and emailing. Clicking the blue *Connect* button adds the person to the user's list of connections (which appear in the lower right of the employee profile document). Finally, black icons lead to the employee's LinkedIn profile, Twitter feed, and Skype. So many helpful morsels, and this is just the top section.
2. **Skills:** Users also choose the skills that appear in the *My Skills* section, which provides important insights into employees as a resource for others at Flight Centre. Users looking for help, for example, can search by skills to find the right colleague for the job.
3. **Organization chart:** An organization chart, zooming in on the employee's team, gives a sense of the person's location in the Flight Centre organization.
4. **People:** The *My Network* section lists coworkers that the person is connected with. Like the other items in the right rail, this gives more insight into the employee and also may suggest valuable contacts.

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Forms Library

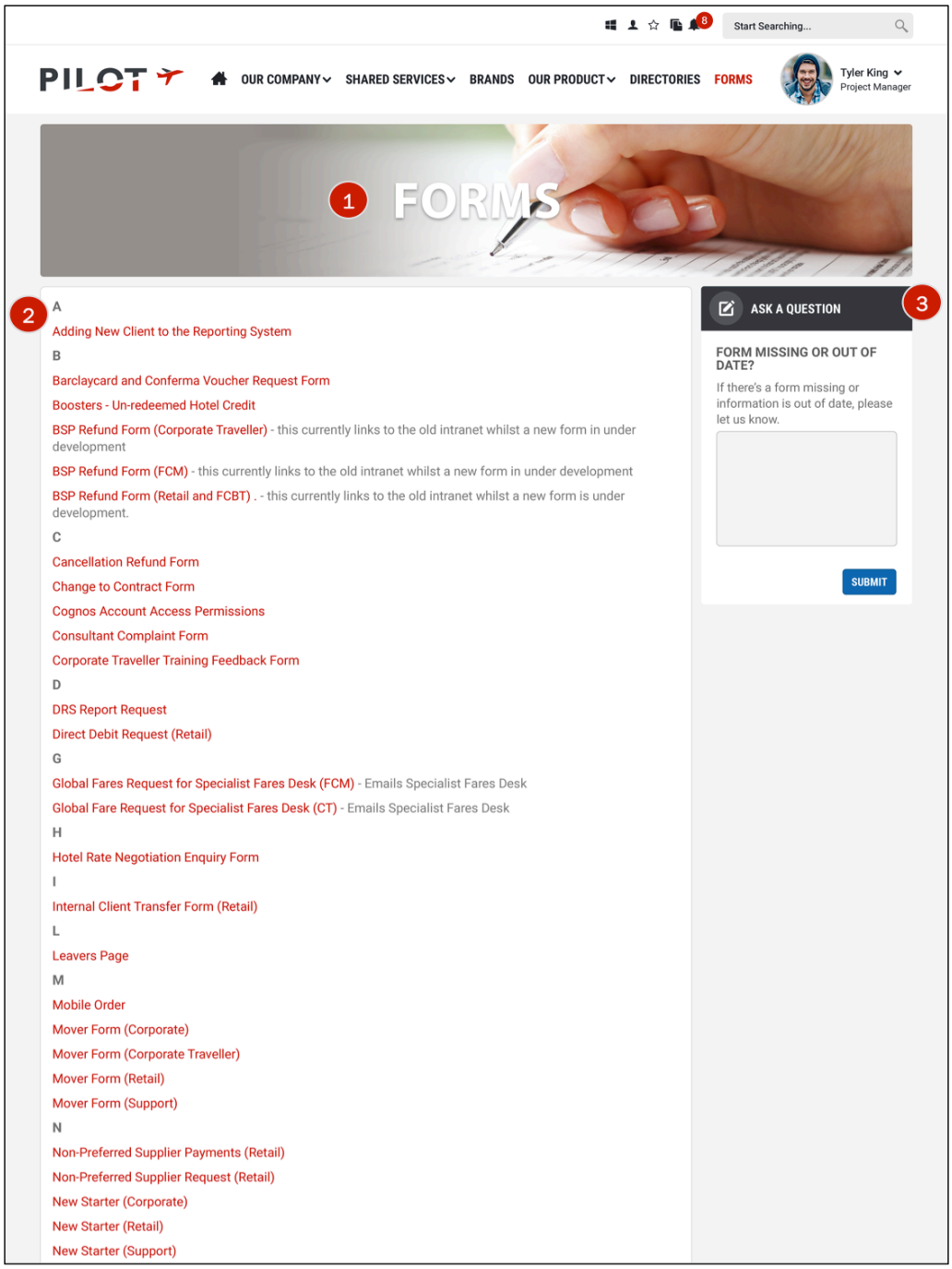


Image 133. Flight Centre Intranet Forms Library. The Flight Centre intranet consolidates all forms on one page, arranged in an alphabetical list. *133_FlightCentre_09_Feedback_Form.png*

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Forms Library, Highlights

The forms library houses all forms on the Flight Centre intranet. Putting these all in one place eliminates the need to hunt for forms. Employees can access the library via the global navigation, so no matter where they are on the intranet it is readily available.

1. **Page title:** The page title, *Forms,* confirms to users that they are on the *Forms* page.
2. **List:** Forms are listed in alphabetical order. Each letter of the alphabet acts as a section heading.
3. **Page feedback:** The *Ask a* Question mini-form in the right rail appears on many pages on PILOT. Using it, employees can note when content is inaccurate or needs an update. The instruction is welcoming, letting users know they can ask a question or report out-of-date information. The intranet administrator and page owner both receive an automated email notification about all such comments.

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New Hires Form

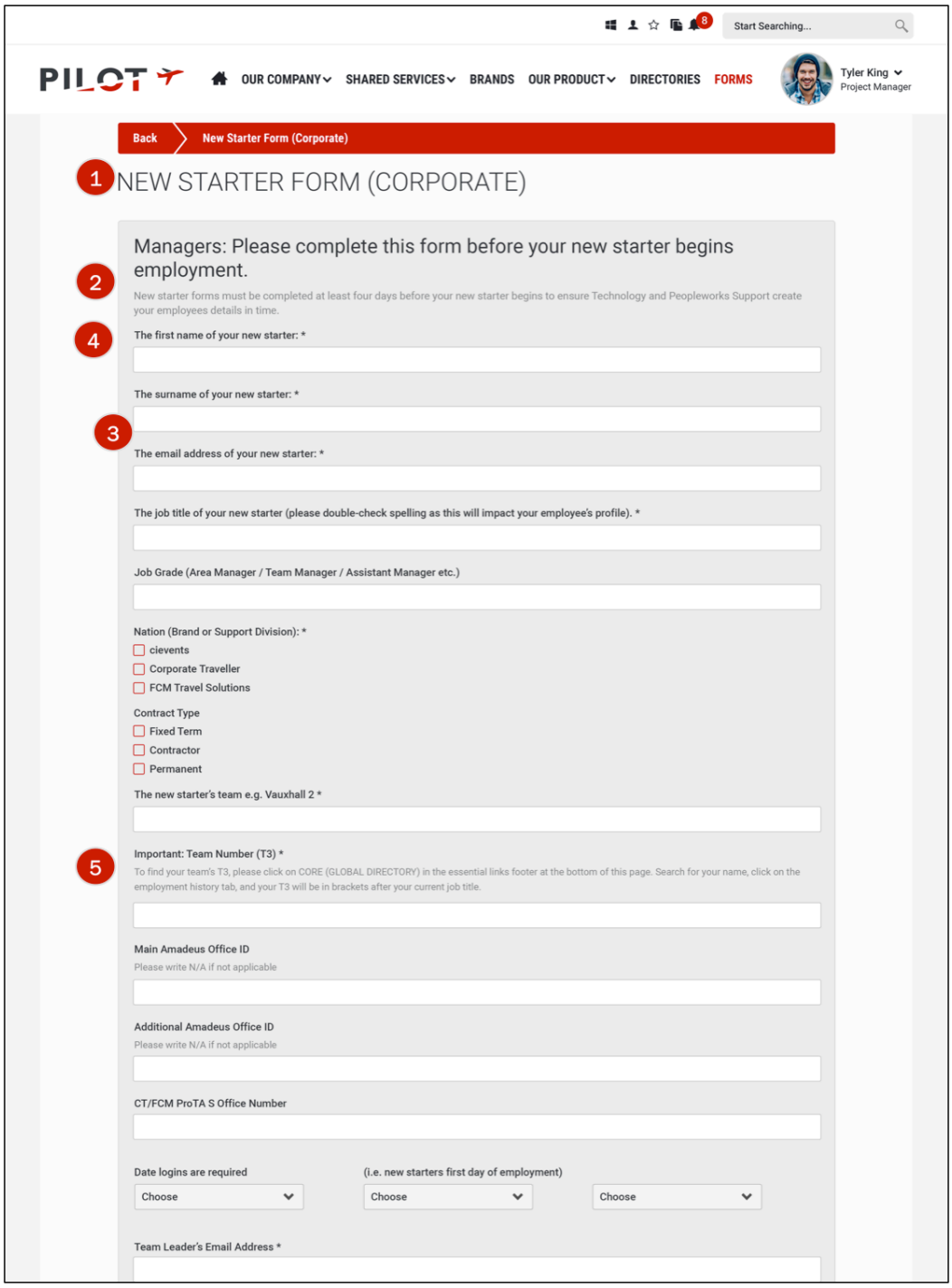


Image 134. Flight Centre Intranet New Hire Forms. The new hires form makes it a snap for managers to get new hires set up in Flight Center systems. *134_FlightCentre_10_Forms.png*

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New Hires Form, Highlights

The well-designed new hires form makes it easy for managers to ensure that new Flight Center employees will be set up to use the needed systems. A simple tool like this helps keep managers' tasks in check, and starts new employees off on the right footing.

1. **Title:** The large title confirms that users are on the *New Starter Form* page.
2. **Instructions:** Large text below the title offers basic instructions about who should fill in the form, why, and when. Smaller text with more details appears below the larger text.
3. **Field label spacing:** Field labels appear just above the associated field, making them easy to scan and use. In this design, the team thwarted a common usability issue with labels above fields—that is, that users cannot tell if the label is associated with the field above or below it. This excellent design shows the simple solution that's not always easy to implement: provide the appropriate amount of vertical spacing between the label and its field. Also, provide enough (and more) vertical spacing between the field and the label below it that's related to the next field. This design nails it.
4. **Field label content:** The labels are detailed yet not overwhelming. For example, *The first name of your new starter* reminds managers that they are filling in the form about someone else, not themselves.
5. **Assistance text:** Some of the more complicated or lesser-known processes have an explanation between the label and the field. These prompts help ensure that users are answering everything accurately.

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IT Department

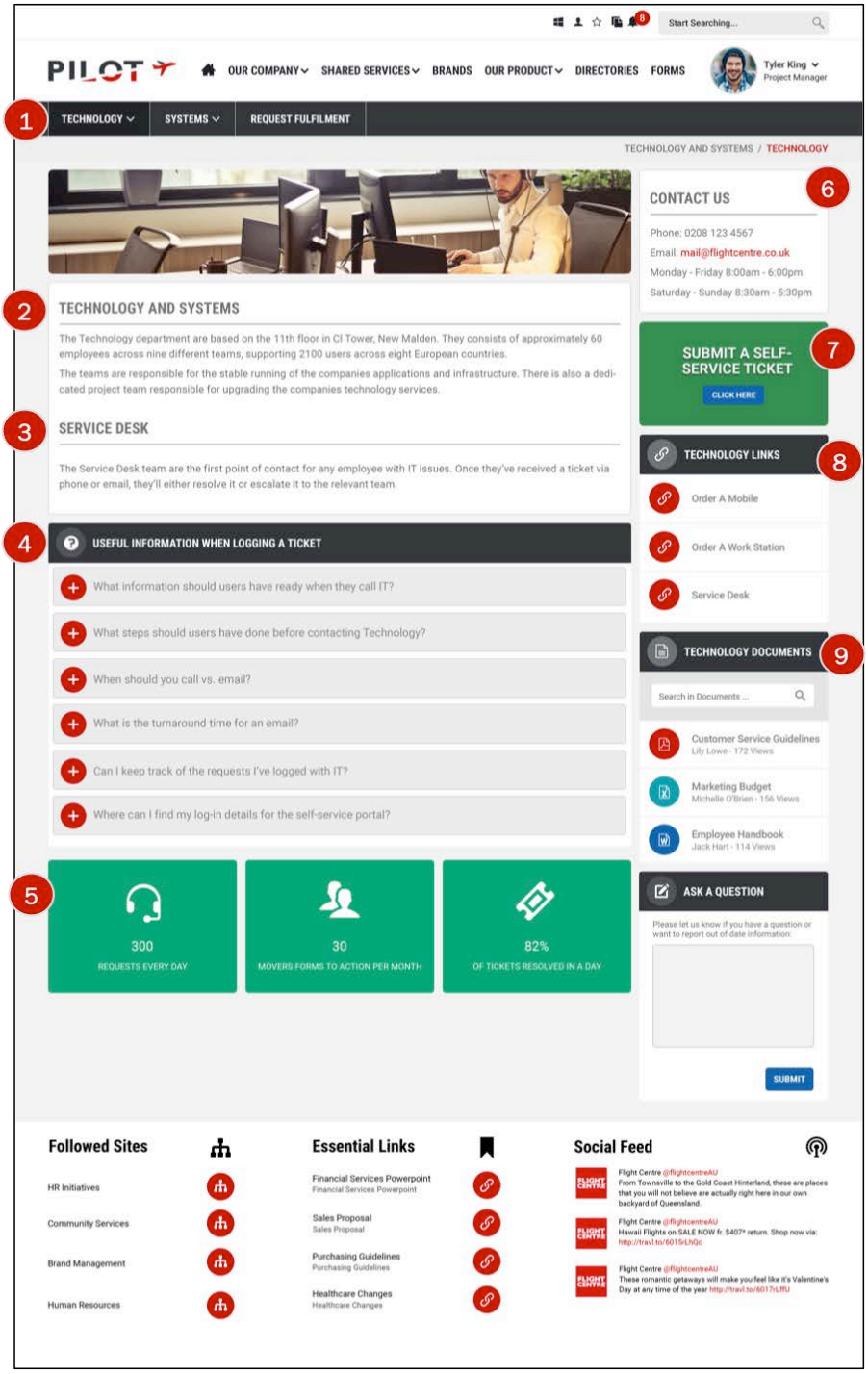


Image 135. Flight Centre Intranet IT Department. Employees can self-diagnose issues, create service request, and much more in the intranet's IT section. *135_FlightCentre_11_Department_IT.png*

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IT Department, Highlights

The Technology Department at Flight Centre offers a comprehensive *Technology* section on the intranet. Pages include everything from policies and guidelines to creating service requests. Also, a services page shows the status of all IT managed systems across the organization. At a glance, users can identify if a technology they want to use is having issues, click to get more information, and receive real-time updates. The addition of this page on PILOT has reduced email overload exponentially, as the previous intranet required IT to email service updates to the entire organization every 15 minutes.

1. **Menu:** The IT section includes several pages, so it offers its own navigation menu at the top. This makes it easy for internal clients to traverse the IT-related content.
2. **Introduction:** The page's top section, *Technology and Systems,* describes which tasks the department is responsible for, how many people work for IT, and where they are located. This helps employees understand more about the group and how IT can be of service.
3. **Service:** The *Service Desk* section describes how IT acts as a funnel, routing issues to the right people and teams.
4. **Ticket help:** To assist employees in creating an IT service request, also known as a *ticket,* the page provides an FAQ with six common questions. Each can be expanded (with a red plus icon) to show the answers. Following the instructions in this list ensures that employees get their issues reported thoroughly and solved quickly so they can get back to doing productive work.
5. **Department statistics:** Briefing employees about the amount of work a department does can be interesting, and it demonstrates a hard-working team's results. Statistics such as *300 requests every day* can also create empathy in employees who might otherwise expect their service request to be addressed immediately.
6. **Contact:** The phone number, email address, and hours of operation show that IT is approachable and willing to provide one-on-one assistance.
7. **Service request:** The *Submit a Self-Service Ticket* section appears above the fold, as it is a regularly used feature.
8. **Links:** Links related to common technology needs, such as ordering a phone or computer, appear in the right rail.
9. **Documents:** IT-related documents are consolidated for employees in the *Technology Documents* section.

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Brand Page



Image 136. Flight Centre Intranet Brand Page. Each of the 40 Flight Centre travel brands has an intranet page that describes the team, what they do, and more. *136_FlightCentre_12_Corporate_Traveller.png*

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Brand Page, Highlights

There are seven brands within the UK. Each one has a page on PILOT that describes the brand and its team, presents internal and external brand events, coordinates discussions around hot topics, and tracks the brand's KPIs.

1. **Summary:** The page's top section includes the page title, followed by a detailed description of how many people work for the brand, what the brand does, and why it's special. This description is a great way for employees to learn about each of the seven brands.
2. **How the team works:** The *How We Do This* section provides an overview of the brand's core Customer Value Propositions and shows how the team will achieve those targets. Topics about technology, service, expertise, and promise can each be expanded to reveal the related information. Sharing this can help the brand teams learn from one another and develop new ideas for how to improve their own brands.
3. **Team:** A subset of employees, along with their photo and contact information, appears across the width of the page. Employees can use the search field to look for a person working on the brand.
4. **KPIs:** The brands reveal some of their KPIs in cards in the *Key Facts* section. These figures can help keep a brand's team members on track and motivate them to reach shared goals.
5. **Calendar:** The calendar indicates brand-related events with a white dot on event dates. Clicking the date opens a page with event details and allows users to click to add the event to their Outlook calendar.
6. **Documents:** A list of four brand-related documents shows on the page, and the search feature enables users to find others.
7. **Links:** The brand suggests a list of useful websites for their colleagues to consult.

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Global Navigation

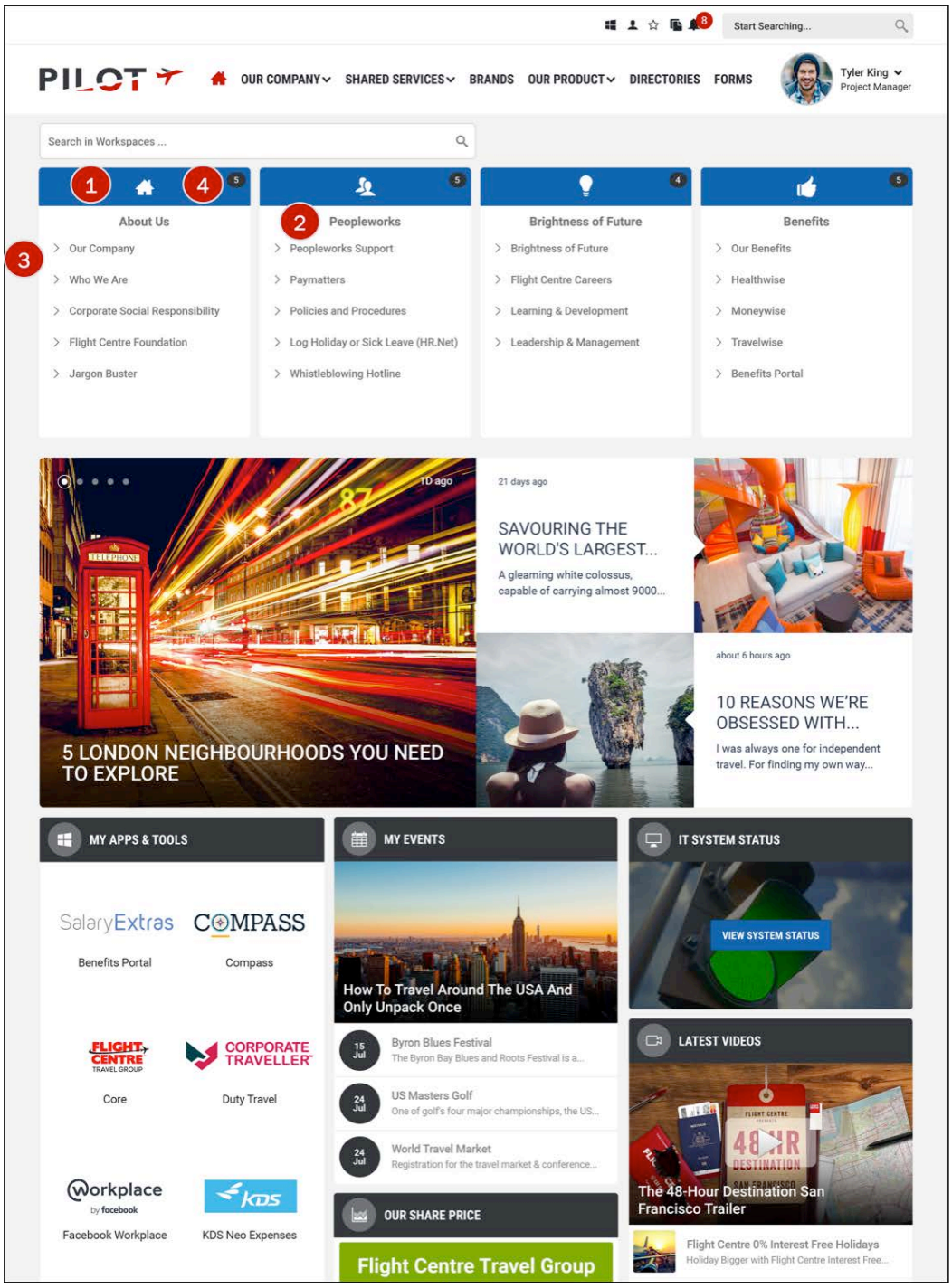


Image 137. Flight Centre Intranet Global Navigation. The global navigation links are easy to scan in the menu.
137_FlightCentre_13_Workspaces.png

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Global Navigation, Highlights

An unconventional global navigation approach gathers content and sites into collections. Each link appears under the appropriate global navigation area. This is loaded manually based on the information users are likely looking for. The site uses analytics on the back end to end to justify these selections.

1. **Section:** The open menu offers sections, each indicated with a blue bar at the top and light grey shading around the remaining three sides. Similar terms are put together to make up each section. Icons at the top attempt to differentiate the sections and make them quickly recognizable.
2. **Title:** Each section title is in bold grey text—dark enough to read, without appearing too heavy.
3. **Links:** Links appear in columns. The short lists are easy for users to read.
4. **New:** The number of links that appear in each section is automatically counted and displayed within the black circle in the top blue section. When searching within this menu, it filters all the columns in real time so that users can quickly refine it to just a few links by typing a few letters.

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DESIGN PROCESS AND USABILITY WORK

The design team conducted various research activities to inform the new intranet's design direction:

- **Surveys and workshops:** For Flight Centre's Internal Communications team, the new site's design was of paramount importance. The company therefore conducted employee surveys and workshops that let the design team gauge the interests, goals, and objectives of end users. One of the questions was: *What ways can an intranet make your working life easier?* The responses suggested improvements to content, design, productivity savings, timeliness, and content accessibility. These findings were largely focused on the need to better organize information on the intranet in order to bolster staff members' ability to work together and collaborate. One particular comment on navigation and design served to influence the new structure: "*I don't think it has to be over complicated. It should be easy to find the department you are looking for. The current issue is that there is a mismatch of information scattered all over the place.*"

  The workshops allowed Flight Centre staff members to talk through concerns about the existing intranet and prioritize areas they found most useful. Site maps were then created to illustrate a structure that would surface important information.

- **Focus groups:** Improving the UX was also an important part of the intranet redesign. The survey results played a huge part in helping to identify what users found important from a UX perspective. The intranet team carried out several focus groups with intranet champions from different areas of the business including Internal Communications, front-line sales, finance, support teams, operations, and leadership to ensure all requirements had been captured and were reflected in the site structure. Among the requirements surfaced were two key needs—the need to have personalized apps and tools available on the homepage, and the need to make forms accessible through the top-level navigation. Also, to ensure consistency and quality, templating was crucial. The design team developed a brand page template in conjunction with brand leaders and others. This gave these leaders a clear understanding of the content they needed to gather and maintain, and also ensured that users would have a seamless experience from one brand to the next.

  Focus group participants also discussed the previous site and how it overwhelmed employees with extremely busy navigation and many buried pages. Further, the site had low-performing search capabilities, and users didn't trust the content's integrity as documents were often outdated. The new site completely overhauled all of these elements—offering streamlined navigation, powerful global search capabilities, and the ability to work collaboratively, with real-time editing on the same documents (permission trimmed), including information on who edited the document last and when.

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- **Card sorting:** Core IA was established through card-sorting activities, in which design team members had users build an IA that they thought best represented the business and how they would look for information. The team merged these findings into a final IA that kept important information in sight and aligned it to the business structure.
- **Site audit:** The design team also audited the current site to understand which pages and assets were being used, as well as what was important to migrate and give prominence in the new IA.

Buy-In

Buy-in for the new Flight Centre intranet was easy to achieve as the previous intranet had outdated content and poor performance. Users were eager to move on to a new and improved platform, particularly with the new site's emphasis on providing up-to-date and relevant content.

People can now find the latest travel information—including information about disruptions, deals, and business strategy announcements—all in once place. Most importantly, the information they find on the intranet is considered the source of truth, as it is not available elsewhere; business critical information is no longer being communicated via email.

Working with Outside Agencies

Unily is responsible for the intranet's operations, support, and ongoing development. The Unily Consulting and Customer Success teams ensure Flight Centre is able to use the latest product features, provide support for page building, and contribute to the platform's ongoing success and adoption.

GOVERNANCE

INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Internal Communications Team	• Manage the intranet, govern the platform, and train content creators and platform super users
Content Creators	• Create content, build pages, and ensure content is up-to-date on their own department and regional pages

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URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	intranet.flightcentre.co.uk
Default Status	The intranet homepage is enforced on Flight Centre's preferred browser, Internet Explorer

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2002	• First intranet (designed by IT) launched
April 2017	• Recent engagement with Unily began
2018	• New intranet launched • Six-month post-launch survey conducted

CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Contributors	The Internal Communications team has empowered up to 20 different content managers from across the organization to contribute content in their areas of expertise. For example, IT personnel have ownership of the IT page, which allows them to update information quickly without needing Internal Communications approval. Because IT team members are SMEs, it makes sense to give them ownership to share business-critical information that is important for the wider organization.
Contribution	Two Internal Communications managers and approximately 20 other content contributors provide content across the site. Other employees can offer feedback on content to ensure it stays up-to-date by posting to a dedicated forum, submitting a form, or contacting the Internal Communications team directly. News stories and articles can also be submitted for approval.
Training	• Unily consultants conducted training sessions and workshops for content authors so they could learn best practices prior to contributing to the new site. • The Internal Communications team provides ongoing support and training on topics including content creation, page creation, layouts, and best practices. • Guidelines are provided to encourage a consistent tone of voice (informal) to ensure that content is easily communicated without jargon.
Maintaining Quality	The biggest challenge on the Flight Centre intranet is to ensure information is kept up-to-date. Flight Centre has overcome this challenge by giving employees a forum on the platform where they can notify the Internal Communications team if they spot any out-of-date content. Forms have also been strategically placed on pages across the platform, allowing users to highlight outdated content. A completed form is automatically sent to

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	the content author and the Intranet Manager to notify them of any suggested changes to outdated content. Also, a content audit is carried every month to ensure that there is no missing or inaccurate information. The Internal Communications team controls the entire site, but it delegates content authoring to relevant content managers.

TECHNOLOGY

Flight Centre required a solution that could be easily deployed out-of-the-box, and could also be configured and tailored to its specific business needs. It therefore chose to use the Unily intranet platform hosted on Microsoft Azure. Unily's core functionality let Flight Centre implement a rich feature set very quickly and then build unique elements—such as the supplier directory—on top. The platform integrates seamlessly with O365, including SharePoint Online, Skype for Business, OneDrive for Business, Delve, and much more. The site also feeds all company applications and tools into the platform through an OKTA API integration. With OKTA, Flight Centre has a security-trimmed collection of business applications.

ROI

The new intranet's success can be measured in quality of life gains for employees and quality of engagement for the organization as a whole. Specific wins include:

- **Reduction in email traffic:** A key success factor for the Flight Centre intranet project was to reduce email communication across the organization by 88%. Prior to the implementing the new intranet platform, email was the main source of company communication, causing an overload of email traffic that resulted in confusion and critical communications being missed.
- **Provide a single source of truth:** Not only is the site the go-to place for all company information, but it is also viewed as the place to go to receive and digest *credible* information. The Flight Centre leadership team uses the platform for all leadership communication, including to communicate changes in company strategy. In essence, it's not true until it's communicated via the intranet. This has proven to be a huge success factor for the platform.
- **Provide access to company benefits:** The site has made it easy for employees to access company benefits by offering them in a single go-to place. The *Travelwise* page offers easy access to discounted travel and vacation options available to staff; this achievement alone made the redesign worthwhile. By allowing employees to access their company benefits through the site, Flight Centre has seen a record-breaking increase in employee purchases and a huge bump in engagement with the platform.

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- **Create a self-service environment:** With the previous solution, employees had to spend considerable time on the phone with support teams to complete basic tasks. The new platform is far more transactional, high-performing, and intuitive, which has greatly reduced the need for phone support and given employees the ability to serve themselves and increase their efficiency.
- **Follow a content migration principle:** The team followed a straightforward content migration principle: *If it is easier to find the information on Google, then it doesn't belong in the intranet.* This approach facilitated smart decisions about what should stay and what should go. For example, information such as baggage allowance can be found on each airline's website, so Flight Centre didn't need to copy and paste it into a page and use resources to try to keep it updated. Decisions such as this were a big cleanse for the new platform, as was the decision to cut any page without a minimum number of monthly views.

LESSONS LEARNED

The Flight Centre design team learned many valuable lessons through this project, and it shares some of those lessons here:

- **Find champions.** "Identify your intranet champions from across the organization and make sure they are committed from the start. Flight Centre's champions influenced the direction of the project massively."
- **Add a contingency to the project timeline.** "Timelines are estimates and things can go wrong. Plan for the possibility in advance."
- **Don't overlook the IA.** "IA is a critical component of any successful intranet. Make sure the information architecture is useful and ensure it is up-to-date. This will save a lot of time in the long run."
- **Projects don't manage themselves.** "Ensure you have a dedicated intranet manager who has a passion and drive for the project. This will help with the development of your site and will ensure your project stays on track."
- **Choose a partner with care.** "The partner you choose to work with will influence your project massively. Ensure your chosen partner is able to give you the face-to-face time the project needs. Conduct workshops, pre-launch meetings, and training sessions with expert partners and this will drive the success of your project. This was essential to the Flight Centre project."
- **Keep content lean.** "When planning an information architecture solution, only include what's necessary. If the information is easier to find on Google, it shouldn't be on the intranet."

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- **Profile data is key.** “Profile data is the backbone of delivering highly relevant experiences, as what you know about your people defines what you push to them on the intranet. Make time to understand your audience. Involve IT and HR and build a process for maintaining this data going forward.”

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The International Business Machines Corporation (IBM)

OVERVIEW

COMPANY

The International Business Machines Corporation (IBM) is an American multinational technology company.

Headquarters: Armonk, New York, US

Company locations: IBM has offices in 170 countries around the world, including the US, Europe, Latin/Central America, Canada, India, Japan, the Middle East, and Africa.

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

Annual revenue: Approximately $80 billion USD in 2017

THE INTRANET

Users: Bluemine serves nearly a third of IBM employees—approximately 125,000—from around the globe. They come to Bluemine for its deep repository of market insights and, once there, can discover relevant market information, share market intelligence with colleagues, and follow the latest market trends.

Mobile approach: Responsive web design

Technology platform: IBM Cloud

TEAM

Design team: A team of 11 designed and helped build the front end, including the IA and graphic design. A software development team, consisting of approximately 30 developers located in the US, India, the Philippines, and Brazil, worked on the back-end data, development, and infrastructure. Approximately 10 other IBMers with background and skills in marketing and analytics helped with user research, metrics, and data analysis.

Leadership: Cynthia Wang, Director of Design and Digital Engagement, Bluemine.

Design (Creative Services): Allison Hwang, Design Lead; Ivette Morello, Content Strategy; Sarah Elix, UX Researcher; Kristen Zelenka, UX Researcher; Jerry Peitzman, UX Designer; Jordan Powell, UX Designer; Kevin Zhou, Front-End Developer; Elysia Hwang, Front-End Developer; Chris Magdalenski, UX Designer; Radcliffe Saddler, UX Designer; Makrand Patwardhan, UX Researcher.

Development: Allen Montejo, Alyne Goncalves Prado Aguiar Martins, Arul Natarajan, Deepanjali C S, Jaspreet Singh, Kam Yee, Karthick Rao, Krithi Urubail, Lakshmi Manyam, Mahendran Nagarajan, Matthew Mead, Panduranga Bhandarkar, Praveen Sr, Rajesh Sharma, Richard Tacsion, Richard Nesbitt, Sanjiv Kumar, Santhosh Brugubanda, Shanmugha Rajarathinam, Shreyas Ms, Shyamal Shivam, Sudharkar Kuntumalla, Swaroop Shastri, Venkata Sp Krishna.

Project management/support: Betty Zeugin, Project Manager/Support; Brian Kulak, Project Manager; Avinash Kohirkar, Development Manager.

Marketing/analytics: Alison Gregory, Debbie Bunnell, Deepak Gopalan, Flemming Hansen, Hana Heringova, Kirsty Haynes, Margot Juros, Marie Nuccio, Michael Golas, Radhika Jodhani, Rishabh Jain, Robert Vanderheyden, Sushma Vasudevan, Tushar Pagar.

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INTRANET TEAM



Team members shown here (top row, left to right): Cynthia Wang, Allison Hwang, Jerry Peitzman, Jordan Powell, Elysia Hwang, Kevin Zhou, Sarah Elix, Chris Magdalenski; (second row, left to right): Ivette Morello, Kristen Zelenka, Radcliffe Saddler, Makrand Patwardhan, Allen Montejo, Alyne Goncalves Prado Aguiar Martins, Deepanjali C S, Jaspreet Singh; (third row, left to right): Kam Yee, Karthick Rao, Krithi Urubail, Lakshmi Manyam, Mahendran Nagarajan, Matthew Mead, Richard Tacsion, Richard Nesbitt; (fourth row, left to right): Sanjiv Kumar, Shreyas Ms, Shyamal Shivam, Sudharkar Kuntumalla, Swaroop Shastri, Venkata Sp Krishna Betty Zeugin, Brian Kulak; (fifth row, left to right): Avinash Kohirkar, Alison Gregory, Debbie Bunnell, Flemming Hansen, Hana Heringova, Kirsty Haynes, Margot Juros, Marie Nuccio; (bottom row, left to right): Michael Golas, Radhika Jodhani, Rishabh Jain, Robert Vanderheyden, Sushma Vasudevan, Tushar Pagar. Not pictured: Arul Natarajan, Panduranga Bhandarkar, Praveen Sr, Santhosh Brugubanda, Rajesh Sharma, Shanmugha Rajarathinam, Deepak Gopalanz.

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HIGHLIGHTS ABOUT THIS WINNER

The International Business Machines Corporation (IBM) is no stranger to creating great intranets; this is its third appearance in our Intranet Design Annual. This year's winning entry, *Bluemine*, is its market intelligence intranet, which is full of internal and subscription-based reports and insights that inform about a third of all IBM employees (approximately 125,000 people from around the globe) and help the company triumph in the technological marketplace.

- **Content:** The application mines and consolidates more than 68,000 IT analyst reports from more that 25 different vendors and provides these rich reports for IBM employees. Bluemine also exposes and makes available additional content for purchase, rounding up every possible research outlet that employees might need to gain competitive insights.
- **Metadata:** Each report is carefully documented, described, and tagged to maintain the repository's health and make information easy to search for and find.
- **Search:** Sorting and filters are necessary for such a deep data repository. The refining features are thorough, but not cumbersome, and float the most important information to the top of the SERP.
- **Search feedback:** Users can provide site and SERP feedback, all of which designers use in their persistent pursuit to make search, and the site as a whole, even better.
- **Mobile:** Although only about one percent of Bluemine use comes from mobile, the team created a fully responsive site to accommodate all users' needs, no matter how they choose to access the site. All features and content are accessible via mobile. This new design eliminates issues that were present in the legacy (and nonresponsive) version of Bluemine, including the need to allocate resources to maintain a separate native app for mobile users; fixed-width UI issues; limited functionality in the native app (it offered only search); inability to access proprietary tools, dashboards, or landing pages; and inability to download internal reports or access external analyst reports.
- **Bookmarks and notifications:** Users can customize their bookmarks page and sign up for email digests that summarize recent reports on topics of their choosing. These features take the search work out of the equation, while keeping users apprised of information that matters to them.
- **Simple text:** Content writers were very disciplined when writing the text for this site. The market reports can be dense, but the writers provide simple, short text to describe pages and features, offering a welcome break for users—and getting them to the main point as quickly as possible.
- **Relaunch information:** To make clear how the design has changed since the legacy version of Bluemine, designers included summaries of site content and short video vignettes to described the redesign.

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- **Help:** The wide set of help-related features assist people in using Bluemine to its highest potential. The site includes help, FAQ, detailed release notes for each app update, *What's New* tips, help about every available tool and dashboard, and short video vignettes describing how to use key features such as search.
- **Fat footer:** The large footer at the bottom of all pages includes the help and FAQ, accessibility information, contact, and more. The grey background is a subtle visual indicator that separates the footer from the rest of the page content.
- **Graphic design:** Images are used sparingly on the site, and mainly to reinforce messages. The dark blue section backgrounds and small chunks of text give the site a consistent, minimalist, and recognizable style. The market intelligence report content is clearly the star being showcased in this design.

BACKGROUND

While Bluemine has provided high-quality content to IBMers for nearly 15 years, users described the legacy intranet application as hard to navigate and overwhelming. With limited resources available and the need for strict adherence to IBM's intranet regulations, past efforts to improve the UX had been challenging; further, as the number of users increased, the intranet's patchwork and stop-gap solutions became unsustainable.

Prior to the complete overhaul of Bluemine, several preceding projects aimed to address many of the existing pain points by introducing new and novel features—such as cognitive search—but as these features were appended to legacy Bluemine, the overall experience began to suffer. The platform started to feel disjointed and "Franken-knitted." Then, in 2016, an in-house design team was hired and, in 2017, Bluemine leadership changed. These events eventually culminated in a proposal to redesign the entire Bluemine application.

Goals

The goal of the redesign was to transform Bluemine into a simple but comprehensive community for consuming, monitoring, and sharing market insights. The redesign aimed to simplify navigation and improve the platform's search capabilities, as well as improve the front-end interface and back-end technology.

Challenges

The IBM team encountered and overcame many challenges during the redesign, including:

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- **How to achieve content alignment:** Early research revealed that the most valuable part of the Bluemine application was the content, so the redesign relied heavily on creating a content strategy to support its deep repository of data and insights. The project team knew that it was important to first align the content before sketching even a single wireframe. With that in mind, the team began a content audit to inventory Bluemine's considerable content offerings, which included 668 pages, 126 tools, and 1,800+ internal active reports. These assets were managed by 50 content owners from different parts of the Bluemine intranet application. In addition to internal content, the application also offered more than 88,000 external reports provided through vendor relationships. So, the audit helped to identify many challenges the team would have to address, including content redundancies, the need for significant manual upkeep, and a cumbersome search engine.
- **How to grow the team:** As the growing mountain of work came into focus, the team realized that in order to ship a redesign before the end of 2017, it would need to add new talent to the team beyond the initial core group of 20 designers and developers. As the team grew in number, it also grew in areas of expertise, and eventually included content managers, marketers, data analysts, and folks from across many other disciplines. With this team expansion, however, it was harder to maintain strategy alignment. Product owners wanted to keep content focused on the new architecture as much as possible, yet some stakeholders had a limited understanding of the team's process. These stakeholders mostly expected the team to take existing content, re-skin it, and then move it to new backing technology without considering the architecture or content organization. That is, they expected the team to "lift & shift"—lift the content, shift it to a new cloud platform, and make it look good. Along with nearly all the content owners, these stakeholders felt very protective of their content.
- **How to apply user research:** Applying user research was a big part of how the Bluemine team achieved content alignment. In the past (pre-2016), the team typically relied on quantitative data and directives from stakeholders. Qualitative research wasn't an integral part of the process until recently, so learning to incorporate this as a process step that could be shared with everyone on the team—from stakeholders to developers to marketers—was a learning curve the team had to overcome. Rich information is at the core of why IBMers come to Bluemine. Armed with this understanding, the team knew it was important to approach the research and design with a content-first strategy.

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- **How to support the old while building the new:** While working on the Bluemine redesign, the same team had to concurrently maintain and support legacy Bluemine so that IBMers could continue to access market intelligence and information. Although this was certainly a challenge given the limited time and resources available to support both efforts, having to continue to debug and maintain the legacy application gave the team valuable insights into existing user pain points—and helped keep them always in their periphery.

Aside from the common issues that arise in a project of this scope, the team also faced unique challenges that it had to address in tandem with the application redesign. These included figuring out how to create foundational components that didn't previously exist, how to develop a cohesive design system that communicates the organization's brand, and how to build a new application while continuing to support and maintain the old one.

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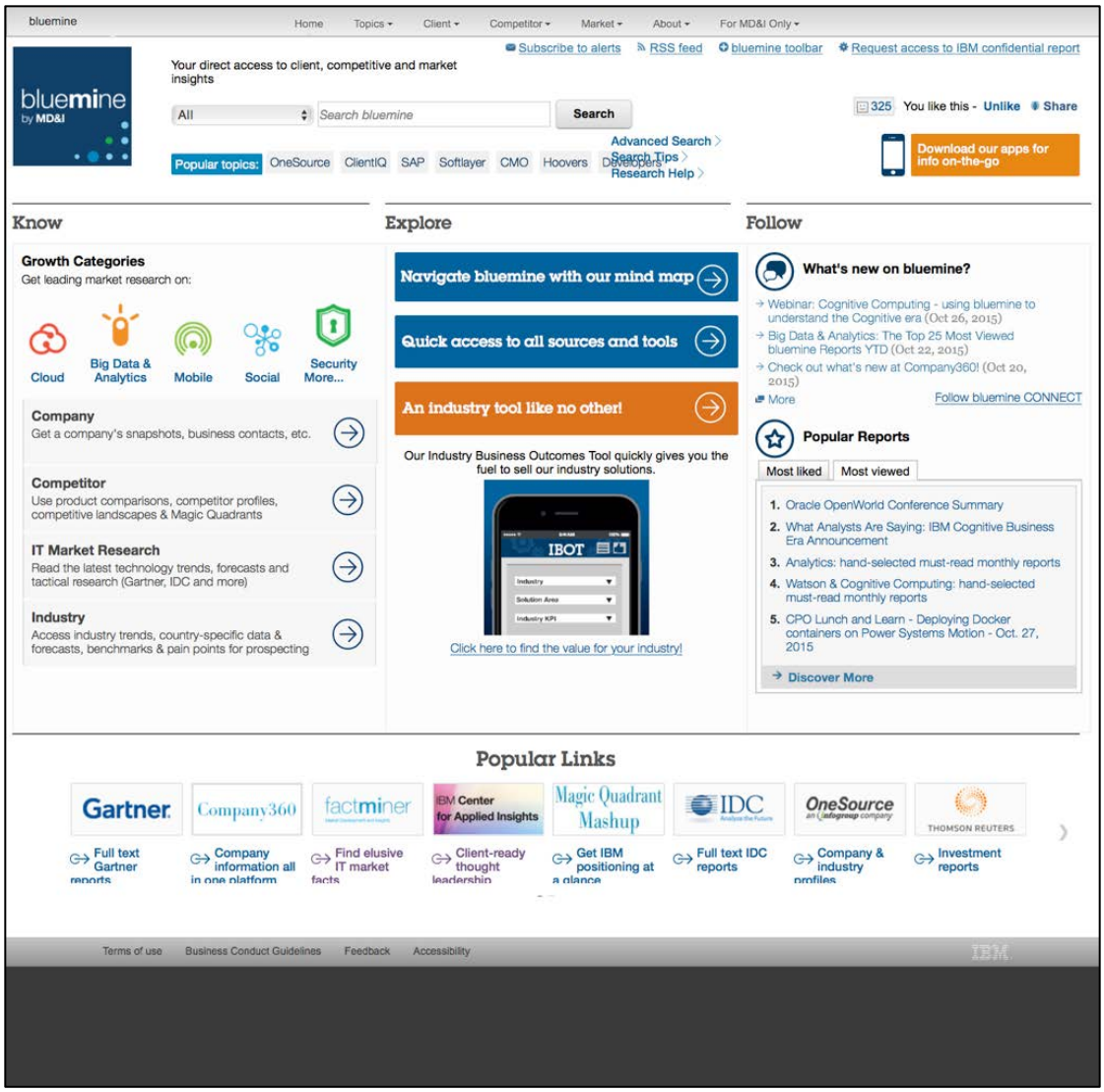
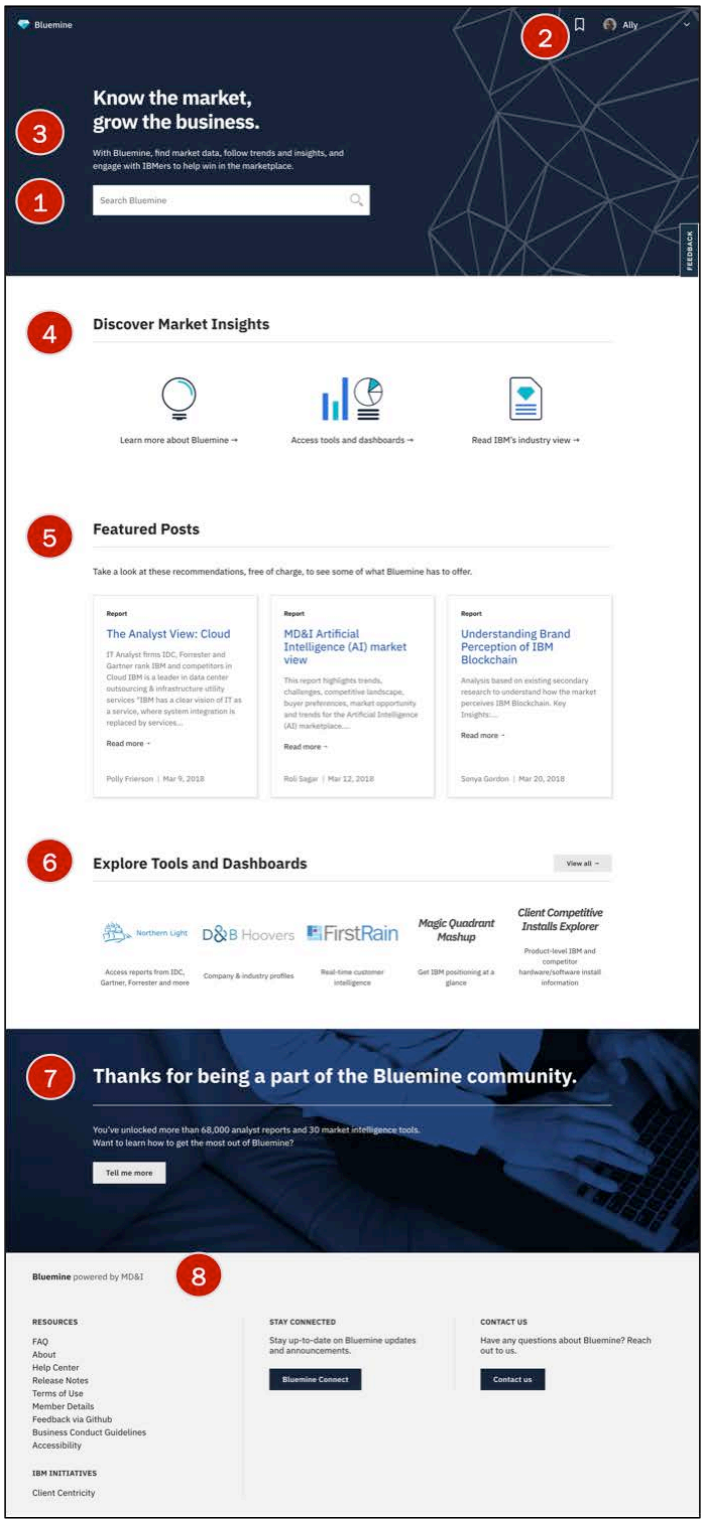


Image 138. IBM Bluemine Legacy Homepage. The previous homepage (circa 2016) was littered with duplicate links. The megamenu at the top was saturated with upwards of 20 links per submenu, while visual defects—such as overlapping links with tags—also degraded the perception of site quality. *138_IBMBluemine_01_home_old.png*

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Homepage

Image 139. IBM Bluemine Homepage. The IBM Bluemine homepage makes it easy for employees to search, access their bookmarks, and get suggestions about market intelligence. *139_IBMBluemine_02_home_live.png*

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Homepage, Highlights

The Bluemine homepage is designed to cater to various situations and personas, including users who 1) know the search terms they are looking for; 2) are not sure what they want, but are looking to discover new market insights; and 3) have already located information and bookmarked it previously.

Given this thoughtful design, it is not surprising that 50% of IBM employees start their quest for market insights on Bluemine's homepage.

1. **Search:** Because most people use search to find information on Bluemine, the team worked to make the search feature a prominent homepage element. Large and located above the fold, the search field lets users type in anything they want to learn about in their markets, and either click the subtle search magnifying glass icon or press their keyboard's *enter* key to invoke the query. Having a light field on the dark blue background makes the search field stand out.
2. **Bookmark icon:** Users can bookmark any pages on Bluemine. Doing so adds the page to the user's bookmarks page, which is accessible by clicking the always-available bookmark (ribbon) icon in the upper right.
3. **Summary:** A short statement explains what Bluemine is and encourages employees to "help win in the marketplace." Having an introduction line ensures that IBMers know what this tool is; keeping the text short makes it more likely to be read.
4. **Discover:** The *Discover Market Insights* section, which appears below the search area, leads to sections that teach users about Bluemine and how it can help them. The first link, *Learn more about Bluemine,* leads to an introduction to the application, its uses, and features. The next section, *Access tools and dashboards,* leads to features that help users find the market intelligence they crave. The final section, *Read IBM's industry view,* leads to an overview of 18 industry topics.
5. **Featured posts:** IBM has many SMEs, and they share their knowledge regularly with colleagues through reports on Bluemine. The *Featured Posts* section features reports related to popular market-related topics. The card for each featured report is easy to scan and includes the title, summary, author, and date.
6. **Explore tools and dashboards:** Users can access more than 30 tools and dashboards related to market intelligence, while the five most popular ones are listed on the homepage.
7. **Thanks—and more:** For people looking for still more information, the homepage's last section before the footer helps with that. It welcomes users to Bluemine, thanks them for using it, advertises that there are more than 68,000 analyst reports and 30 market intelligence tools, and provides links to get more information on how to effectively use them.

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8. **Footer:** The fat footer located at the bottom of the homepage—and all pages—gives users a final chance to find what they need. The left column displays various resources, such as help and business conduct guidelines, while the center and right columns include options to get email updates and contact the Bluemine team, respectively.

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Mobile Homepage

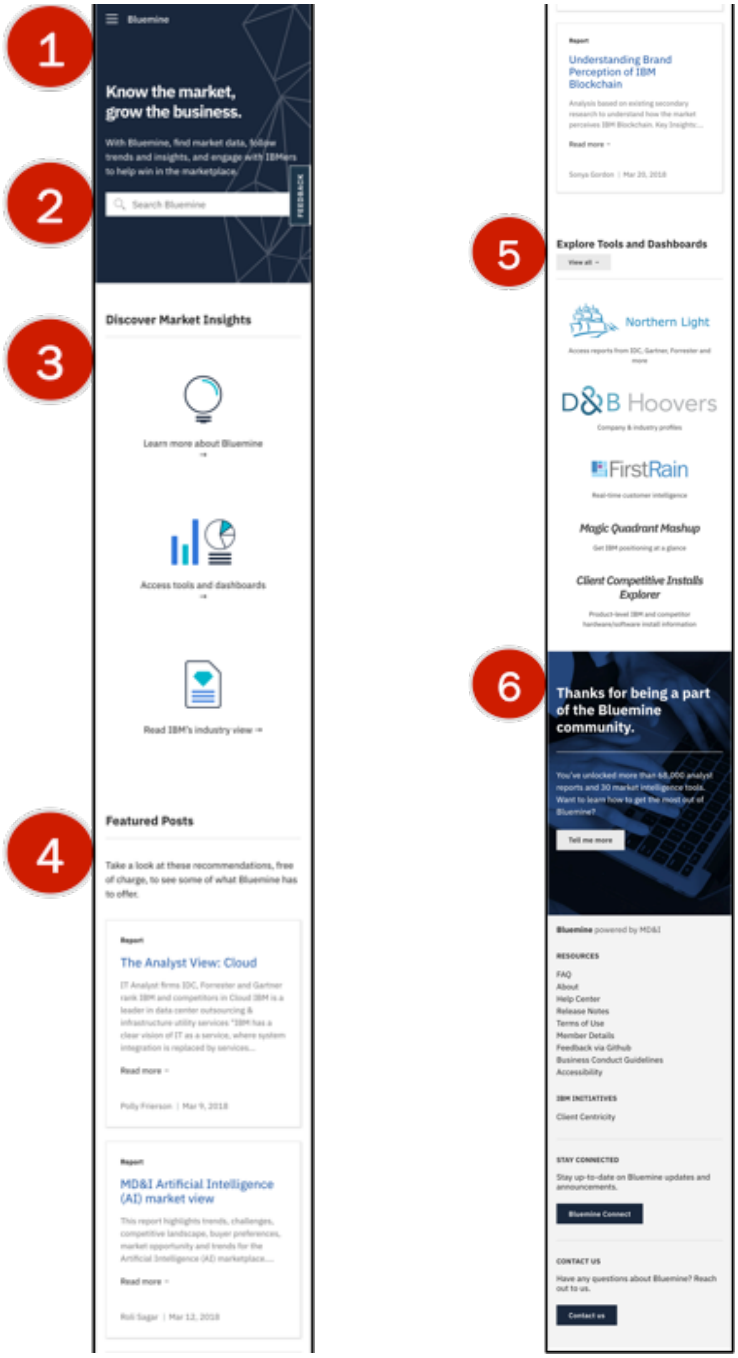


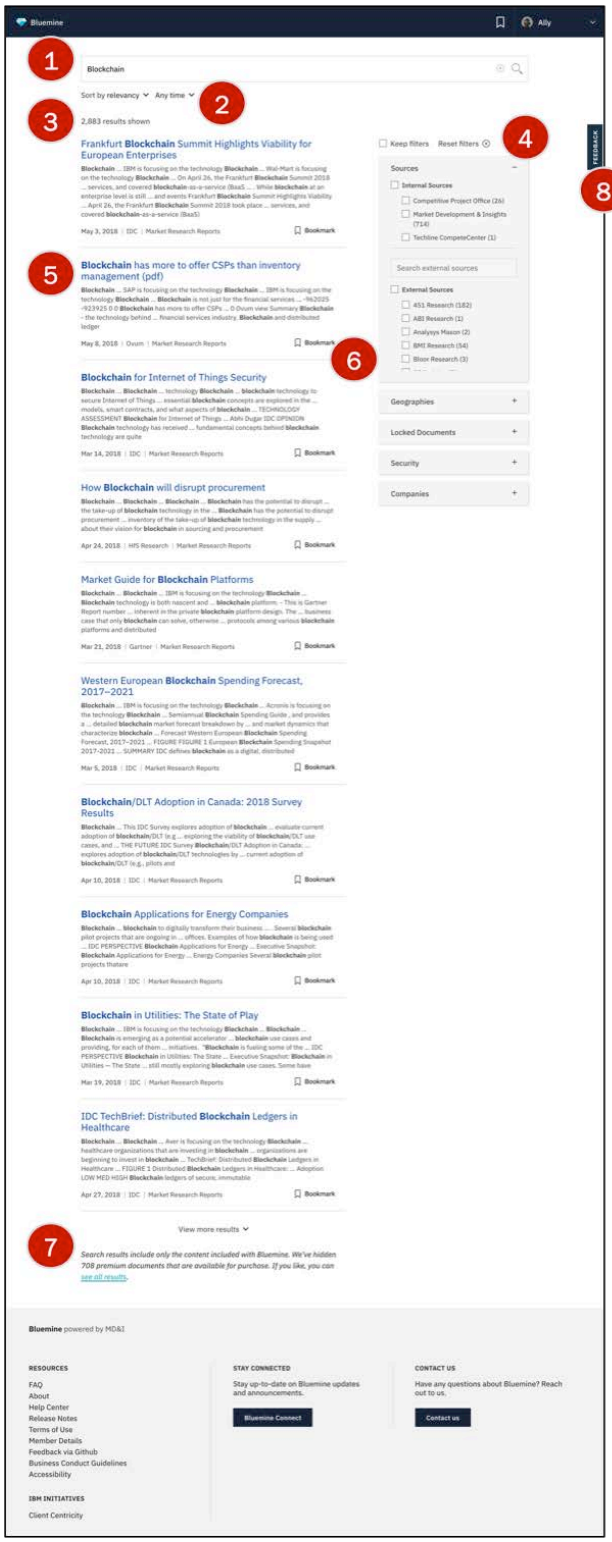
Image 140. IBM Bluemine Mobile Homepage. The mobile version of the homepage is the same as the desktop version, aside from a few responsive formatting tweaks. *140_IBMBluemine_03_homepage_livemobile.png*

Homepage, Mobile Highlights

All features on the mobile version of the responsive homepage are the same as the desktop version, aside from formatting updates to accommodate the smaller screen:

1. **Navigation menu** is collapsed under a hamburger icon.
2. **Search** has a narrower column than on desktop.
3. ***Discover Market Insights*** is stacked vertically instead of horizontally.
4. ***Featured Posts*** is stacked vertically instead of horizontally.
5. ***Explore Tools and Dashboards*** is stacked vertically instead of horizontally.
6. ***Thanks, and more*** has a narrower column than on desktop.

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Search

Image 141. IBM Bluemine Search Results. Search results pages offer sorting and multiple facets to help users refine and home in on the best results. *141_IBMBluemine_04_search_live.png*

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Search, Highlights

Search is the most flexible method for finding the right market intelligence information. The SERPs make the process easy and allow employees to view results in the ways they need to.

1. **Query:** The editable field displays the query so users can easily recall what they entered.
2. **Sorting:** Users can use the down arrow icons to sort results by date, or they can keep the default sorting by relevancy. Also, they can leave the default time period (any time), choose a more specific time period—such as past week, past month, past three months, or past year—or enter a date range. These options help users home in on large sets of search results.
3. **Results:** The number of results is clearly stated.
4. **Refine:** The right side of the SERP offers users a variety of filters, including sources (such as internal and external), geographies, locked documents, security, and related company. The *Reset Filters* link with the *x* icon makes it easy to clear all the filters; this comes in handy when the filter sections are collapsed and filters are not visible.
5. **Result:** Each result displays the title, an easy-to-read summary with the query term in bold, the date in an international format with the month spelled out, the source, and the type of market report.
6. **Bookmark:** A *Bookmark* link with the ribbon icon at the end of each search result makes it easy for users to bookmark a result on the SERP.
7. **More:** Clicking *View more* results displays 10 more results. The URL indicates the pagination, giving users context about how far they are in the results. Clicking *see all results* opens any premium documents that are not part of Bluemine but that employees can purchase, giving them every opportunity to collect as much information as they want.
8. **Feedback:** Users can provide feedback on Bluemine via the *Feedback* button.

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Search Feedback

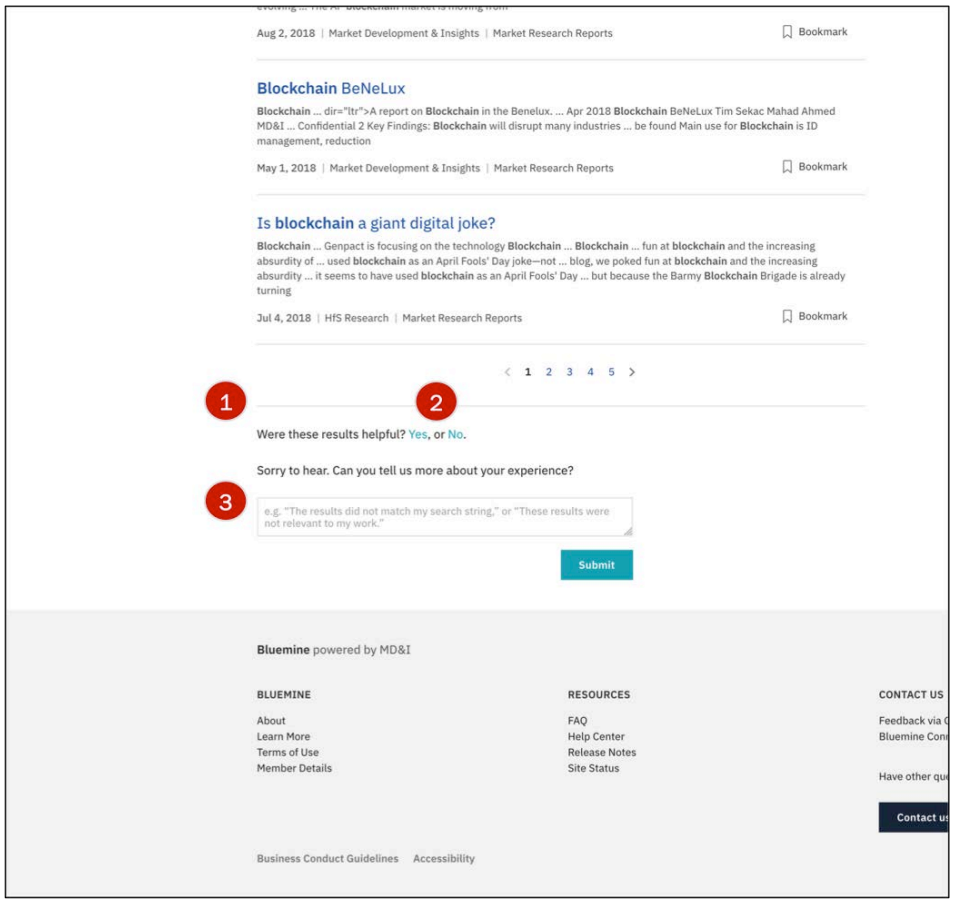


Image 142. IBM Bluemine Search Feedback. The *Were these results helpful?* section at the end of the SERP lets users provide direct feedback about their search. *142_IBMBluemine_05_searchfeedback_live.png*

Search Feedback, Highlights

In an ongoing effort to improve search results, Bluemine developers coded a question about their helpfulness, which appears at the end of the search results. The search team analyzes the feedback for use in its continuing effort to improve search.

1. **Question:** At the end of every search result, users are asked a simple question about whether the search results were helpful.
2. **Yes / no** response: The *Yes* and *No* links make it very quick and easy for people to share their search feedback.
3. **Additional notes field:** When users choose *No,* an additional question and associated open text field appears asking for information about why the results were not helpful.

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Company Cards

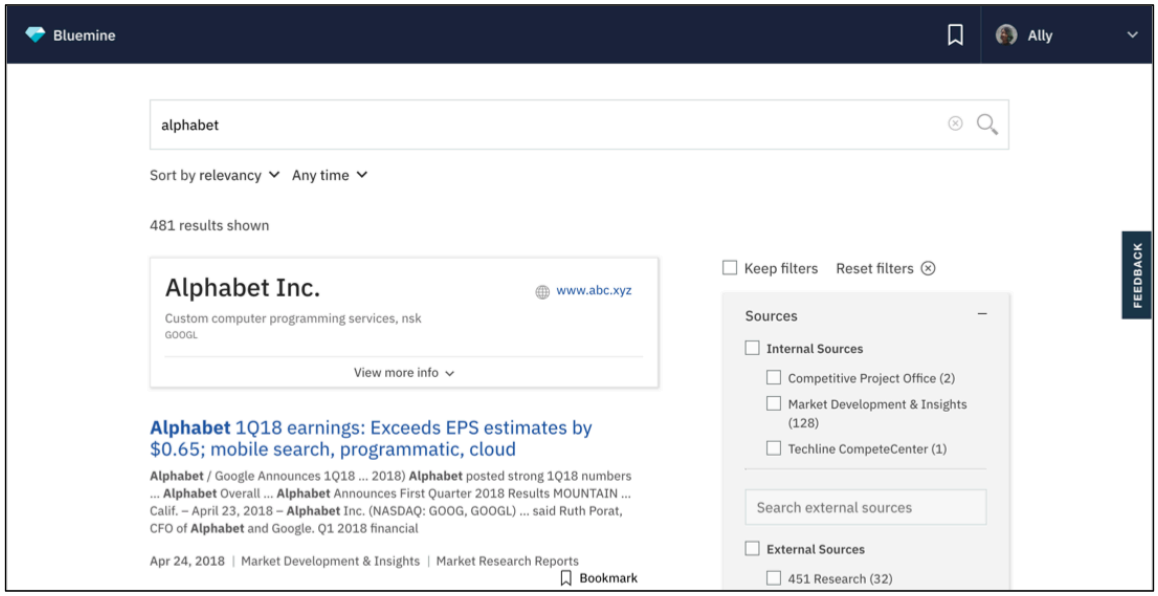


Image 143. IBM Bluemine Company Cards. Company cards appear in search results and show the most basic company information. *143_IBMBluemine_06_searchcompany_live.png*

Company Cards, Highlights

Company cards are another bit of information included in market intelligence. Commonly needed information about clients and competitors is consolidated in cards, making it easy for employees to get the basics quickly.

- **Cards in SERP:** When users query about a company, a company card appears at the top of the SERP, offering basic information such as the company name, URL, and a short description. Clicking the *View more info* expands the card in place to reveal the company's location, number of employees, current chairperson, revenue, revenue growth, DUNS number, and related parent/child companies.

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Mobile Search

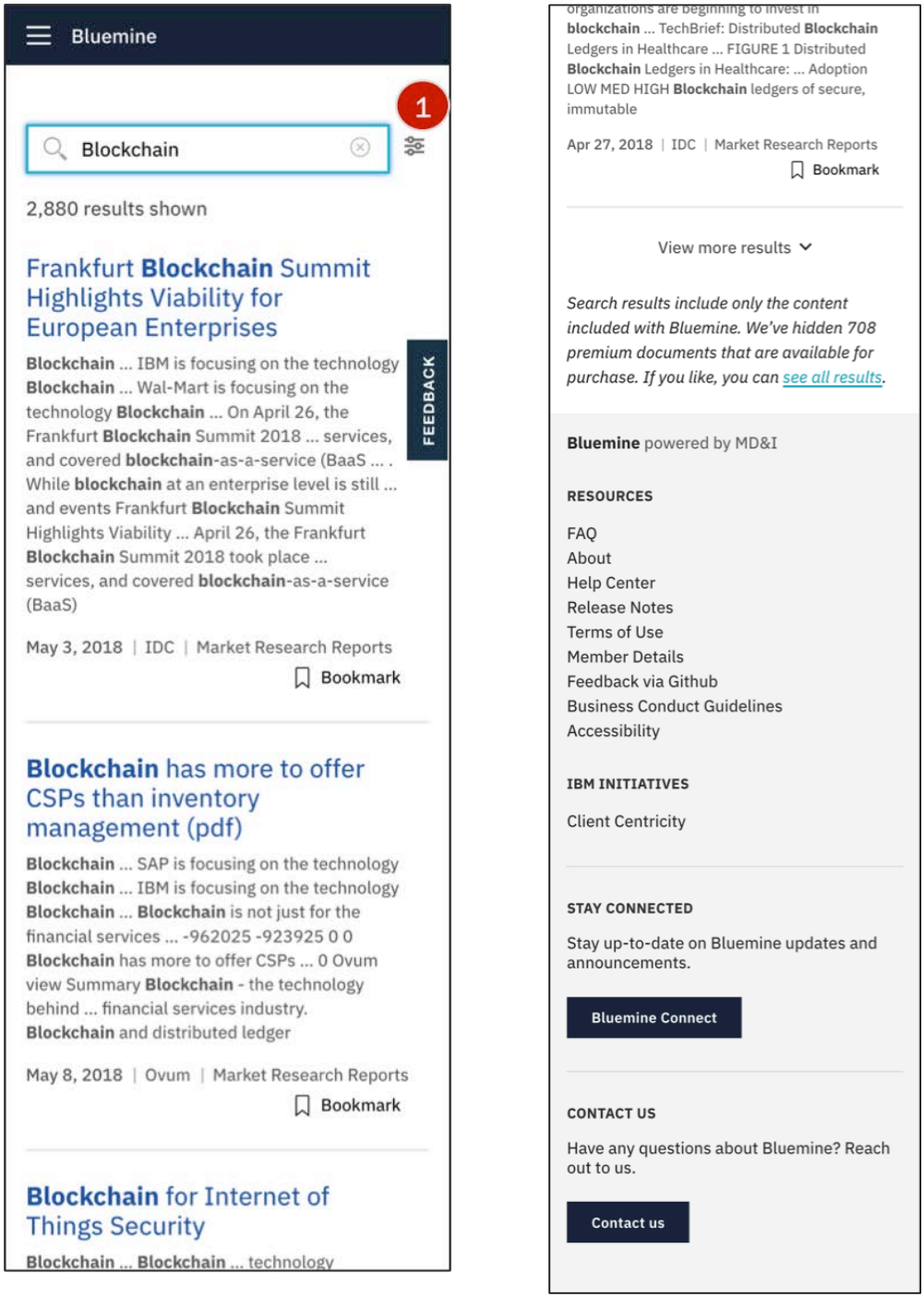


Image 144. IBM Bluemine Mobile Search. Bluemine's search feature is equally simple on mobile devices. *144_IBMBluemine_07_search_livemobile.png*

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Mobile Search, Highlights

Bluemine is a responsive site and—with the exception of a few small prioritization tweaks—the SERP UI on mobile is the same as that on desktop.

1. **Filters:** The filters are collapsed and available via an icon in the upper right; this leaves most of the screen real estate available for the search results.

Mobile Search Filters

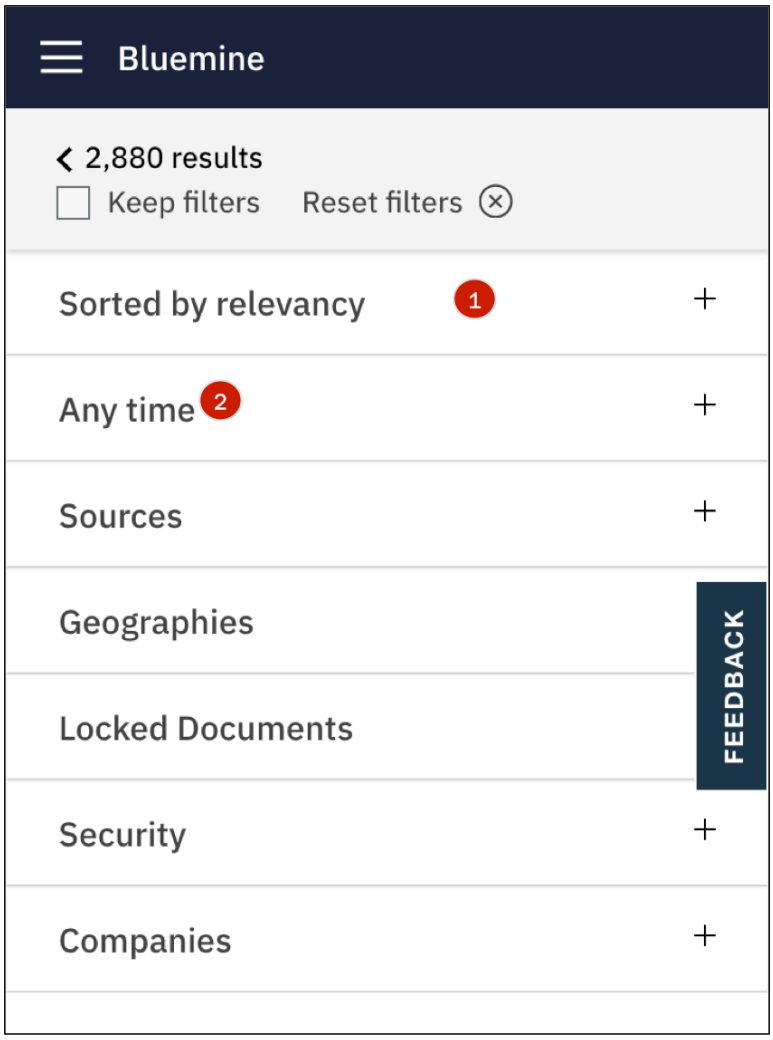


Image 145. IBM Bluemine Mobile Search Filters. When expanded, the filters in SERP allow users to refine the results.
145_IBMBluemine_08_searchfilters_livemobile.png

Mobile Search Filters, Highlights

The same filter topics appear in the mobile UI as in the desktop one.

1. **Expand target:** The buttons to expand the filters are large and tappable, and the plus sign clearly indicates that the section can be expanded to reveal more.
2. **Text:** The text is legible, even on a small mobile screen.

Report

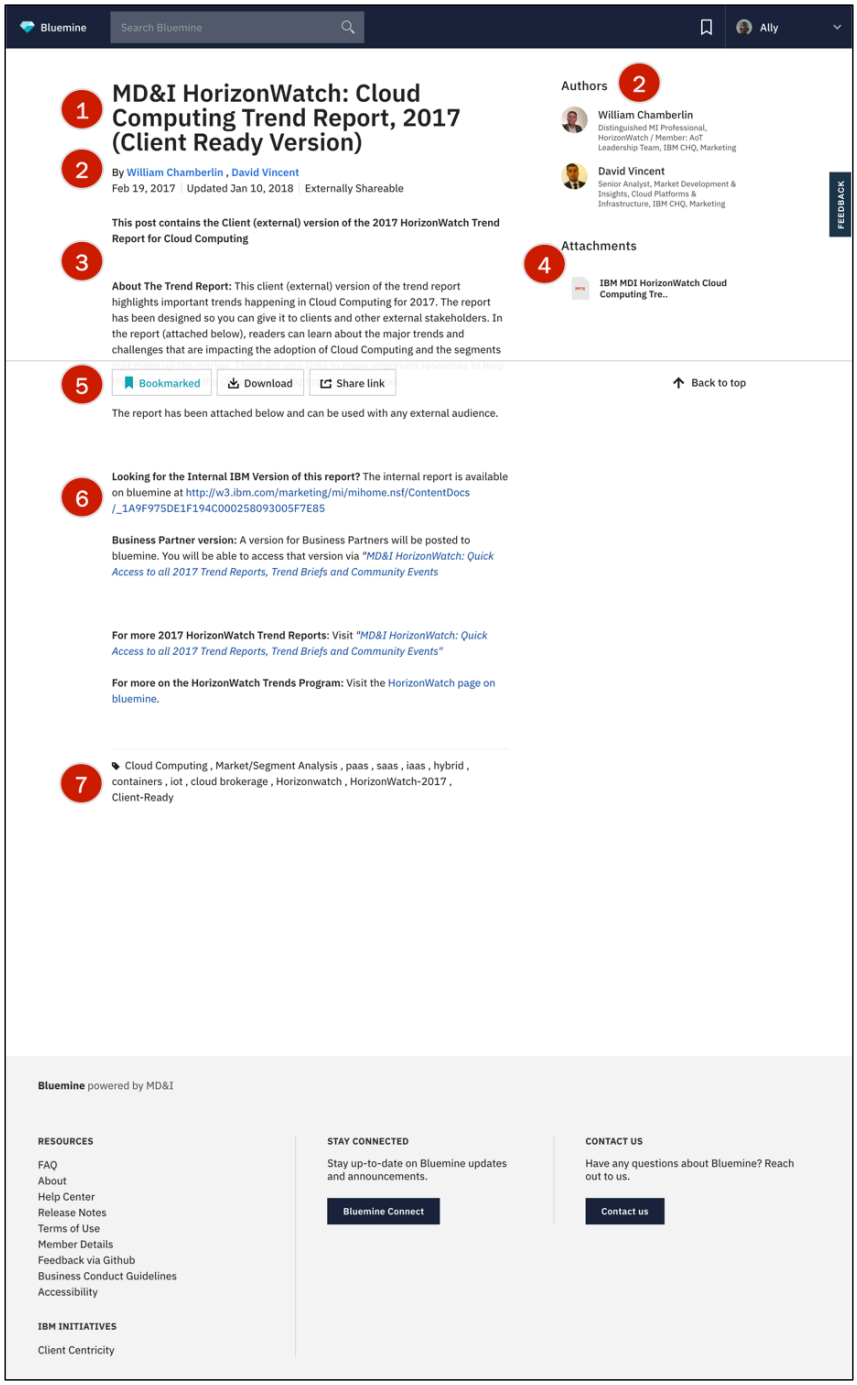


Image 146. IBM Bluemine Report Pages. Intranet report pages summarize information about internal IBM reports.
146_IBMBluemine_09_internalreport_live.png

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Report, Highlights

Bluemine includes reports written by IBM employees as well as reports from external vendors. IBM employees share their perspectives about topics, companies, and industries by writing detailed reports. These reports are housed on Bluemine, along with supporting materials, so that fellow IBMers can benefit from their colleagues' knowledge.

1. **Title:** The report title appears in large bold letters at the top.
2. **Authors:** The authors are listed below the title; their names are links to a list of reports they have authored, which makes it easy for users to read more of their work. Each author's name, photo, and title also appear in the upper right of the page.
3. **Metadata:** Information about the report appears near the top, along with any related versions of the report (such as an external version suitable for sharing with clients).
4. **Attachments:** Authors can also upload other report-related elements, including text files, presentations, videos, images, and audio files. Users can see and download these from the *Attachments* area on the right. The item name appears with an icon denoting the file type.
5. **Actions:** The designers refer to the section below the report's top area as the *action bar* as it includes buttons to initiate several important report actions—including to bookmark, download, or share a link to the report. This action bar is programmed to stay fixed at the bottom of the browser window so that the buttons are always visible if users scroll.
6. **Further information:** This section includes links to more information, including versions that can be shared internally or with external business partners.
7. **Tags:** Tags appear at the end of the report page. These tags relate to industry, company, geography, and topics, and they help readers discover other related reports.

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Bookmarks

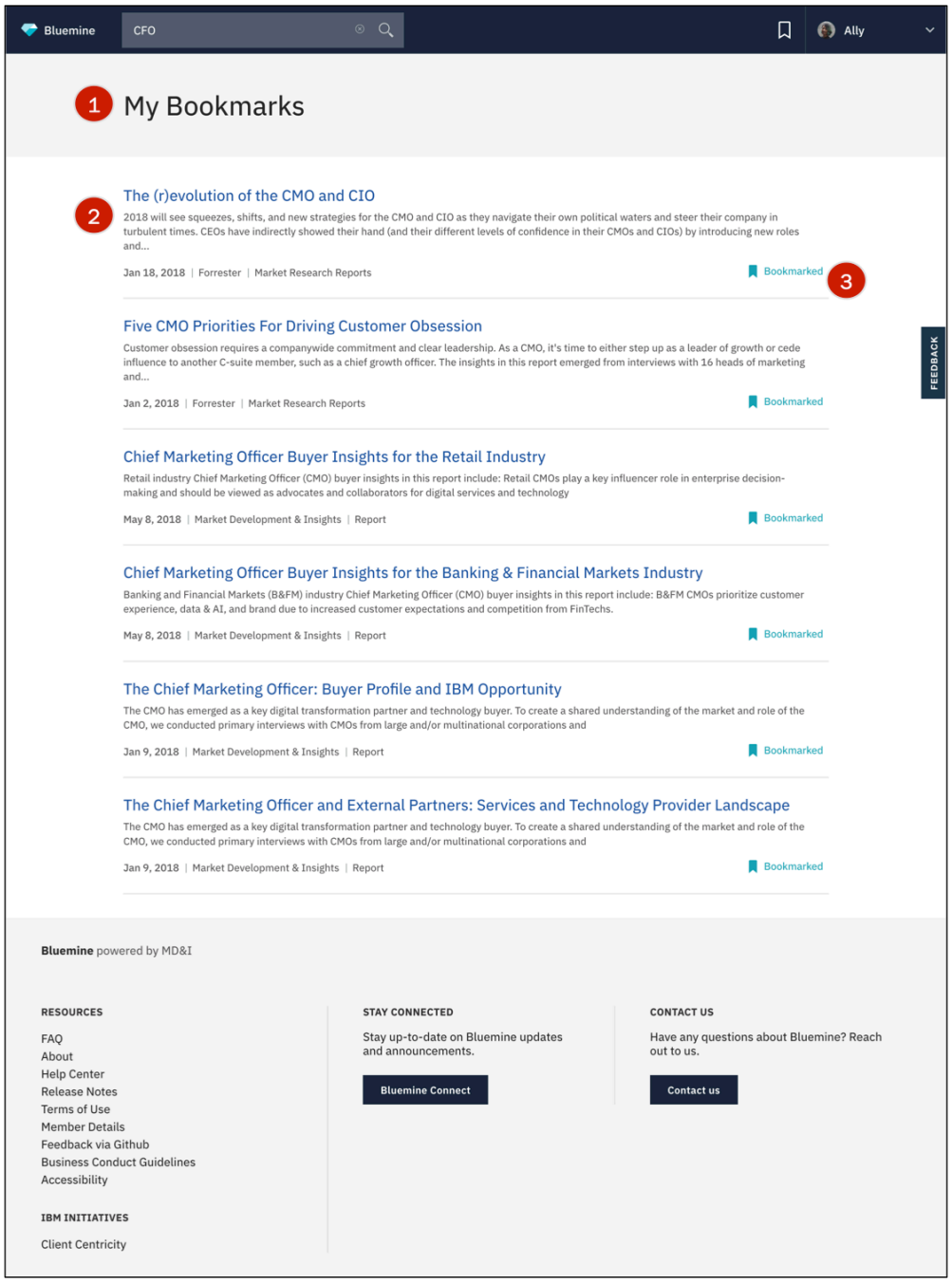


Image 147. IBM Bluemine Bookmarks. Users can see all of their bookmarked items on the *My Bookmarks* page.
147_IBMBluemine_10_bookmarks_live.png

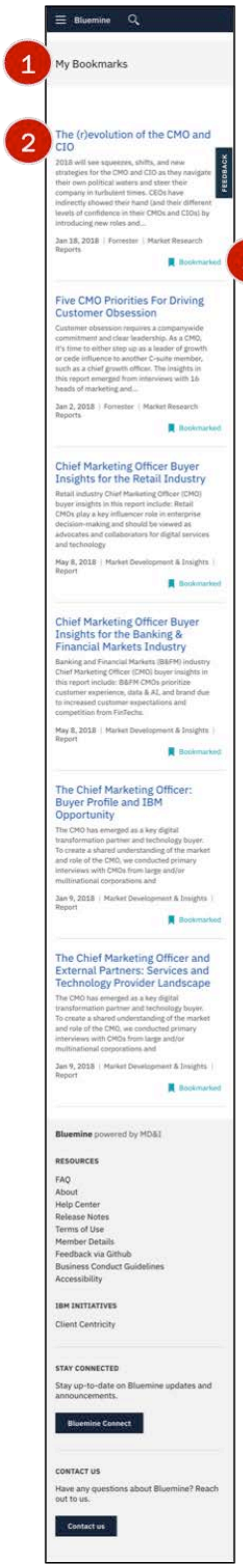
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Bookmarks, Highlights

Employees can create their own sub-repository of research papers on the *My Bookmarks* page.

1. **Page Title:** The *My Bookmarks* title acts as a signpost, reminding users that they are on their personal bookmarks page.
2. **Title and summary:** Each item in the bookmarks list includes the document title, summary, source, and date.
3. **Remove:** Users can remove a bookmark by clicking its associated *Bookmarked* link or icon; that bookmark will disappear from the list once the page is refreshed.

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Mobile Bookmarks

Image 148. IBM Bluemine Mobile Bookmarks.
Bookmarks are available on mobile, with almost the same UI as desktop.
148_IBMBluemine_11_bookmarks_livemobile.png

Mobile Bookmarks Highlights

The mobile version of the bookmarks page is nearly the same as the desktop version.

1. **Page title:** The *My Bookmarks* title acts as a signpost, reminding users that they are on their personal bookmarks page.
2. **Title and summary:** Each item in the bookmarks list includes the document title, summary, source, and date.
3. **Remove:** Users can remove a bookmark by clicking its associated *Bookmarked* link or icon.

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Account Overview

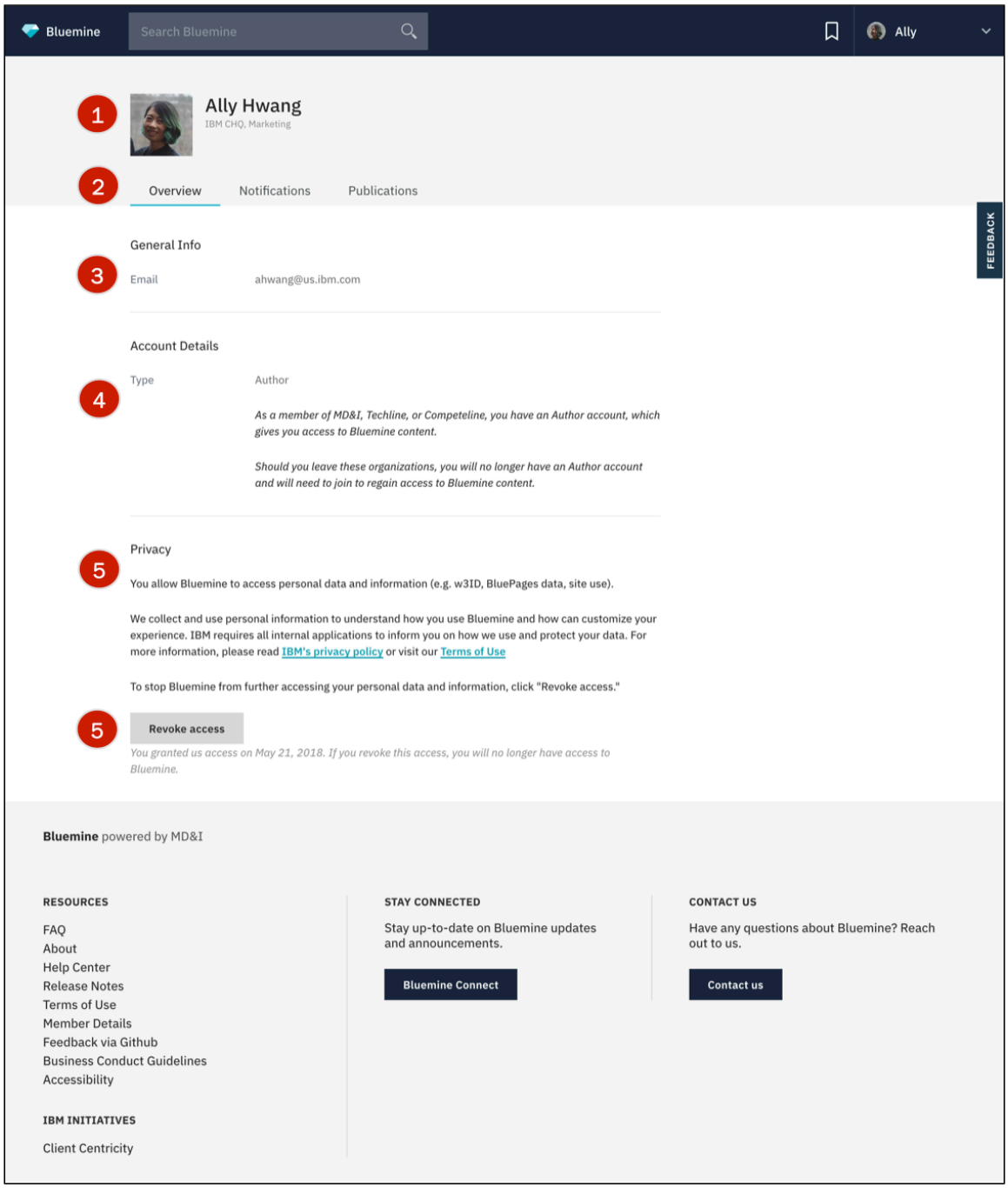


Image 149. IBM Bluemine Account Overview. This page gives users an overview of their own Bluemine account information.
149_IBMBluemine_12_accountoverview_live.png

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Account Overview, Highlights

All IBM Bluemine users have a personal account page that shows their account type, publications they have written, and any notifications they have signed up for, all in a single location.

1. **Name and title:** The user's photo, name, title, and work area appears at the top of the account page.
2. **Sections:** Users can click links to see their notifications and publications.
3. **Email:** The user's email address, which other Bluemine users can also find, appears next.
4. **Details:** The *Account Details* section shows the user's Bluemine account type, along with a description of it. Bluemine has three different accounts type: visitor, member, and author. *Visitors* are typically first-time users, those who have not accepted the Terms of Use, or those who have not consented to letting Bluemine collect personal information in the app. *Members* are IBM employees who have accepted the Terms of Use and granted access to data collection. *Authors* are IBM employees who post content, such as reports and blogs, to Bluemine.
5. **GDPR:** By asking permission to collect personal information (PI), Bluemine meets General Data Protection Regulation (GDPR) requirements. IBM employees must consent to having their PI collected before they will be granted access to Bluemine. The privacy section explains why Bluemine collects PI data; it also states the time at which the employee agreed to grant Bluemine such access. IBM employees can revoke that access at any time using the *Revoke access* button at the bottom of their account page.

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Notifications

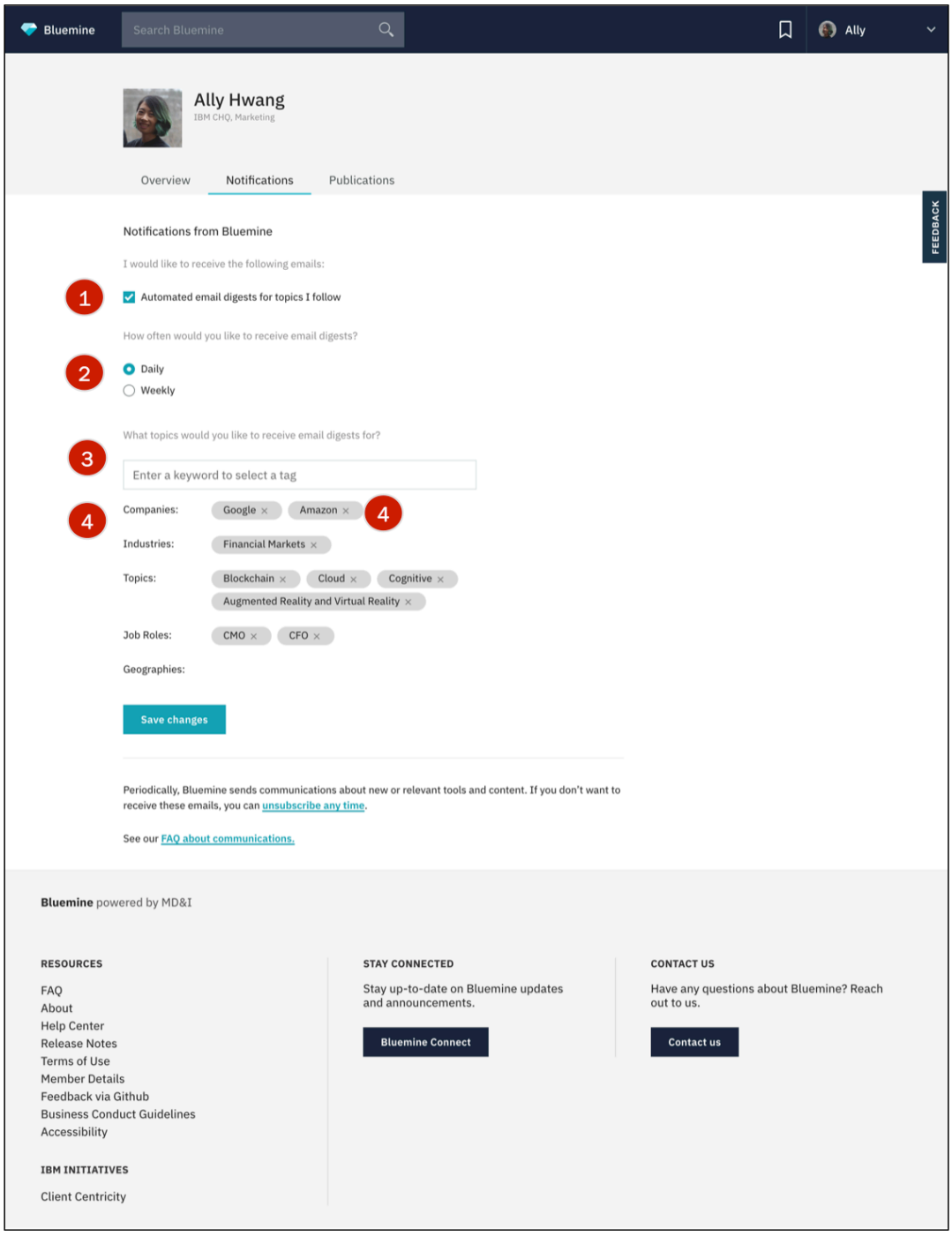


Image 150. IBM Bluemine Account Notifications. Users can see their notifications in the *Notifications from Bluemine* section of their account page. *150_IBMBluemine_13_accountnotifications_live.png*

Notifications, Highlights

It's easy to add topics to an email digest under the *notifications* tab of the employee account page. These email digests aggregate the latest reports added to the Bluemine database for the topics an IBM employee has subscribed to.

1. **Agree:** Clicking a simple checkbox is all the user needs to do to agree to receive an email digest containing the most recent reports added to Bluemine.
2. **Timing:** Simple radio buttons let users choose whether to receive the email digest daily or weekly.
3. **Choose topics:** Users can type keywords in an open field to find topics they would like to subscribe to; they can add as many topics as they like.
4. **Subscribed:** Each topic the user has subscribed to appears on the page alongside a subheading describing the topic type, including: companies, industries, topics, job roles, and geographies. Users can remove any topic at any time by clicking the *x* icon that appears with the related tag title.

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Digest

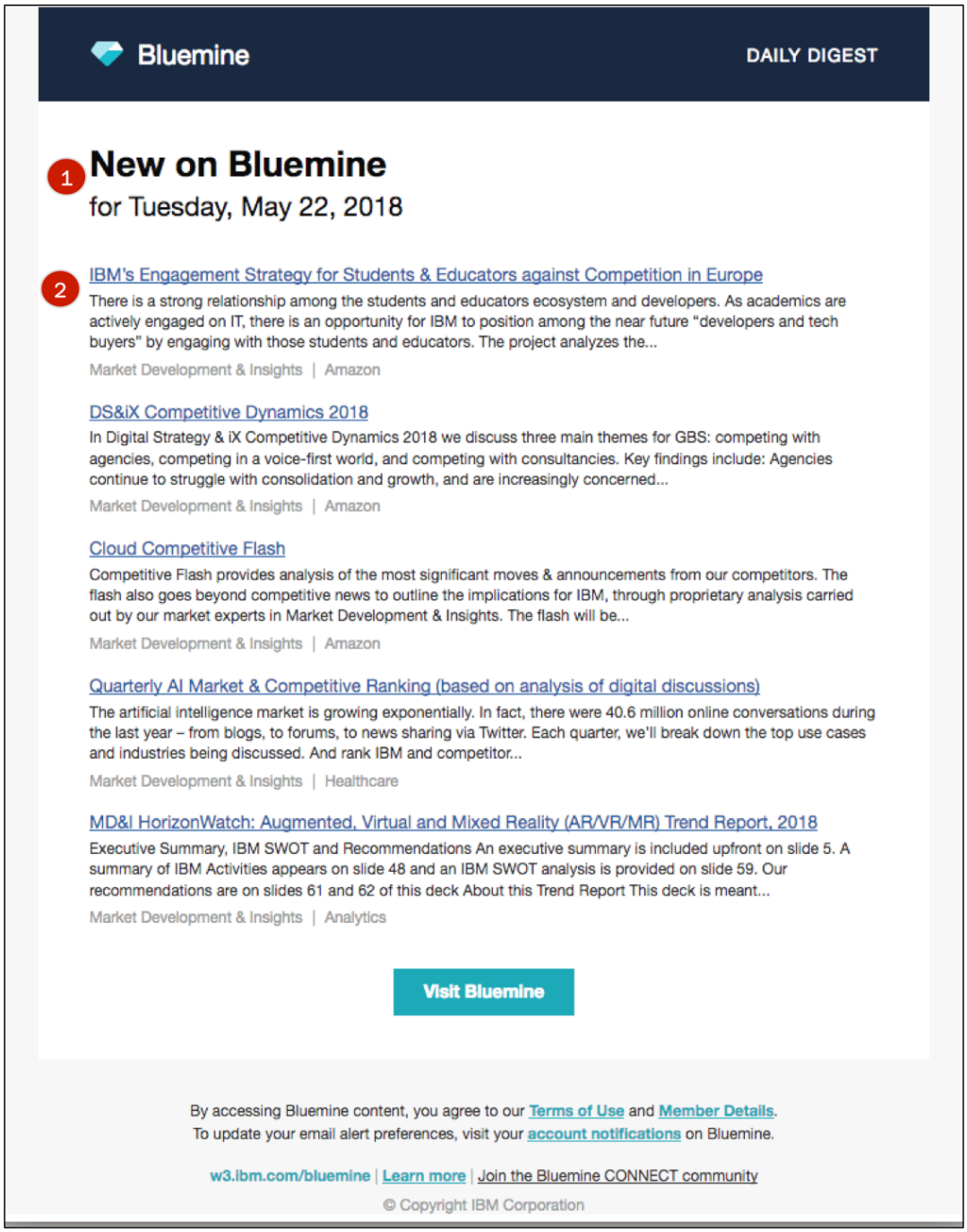


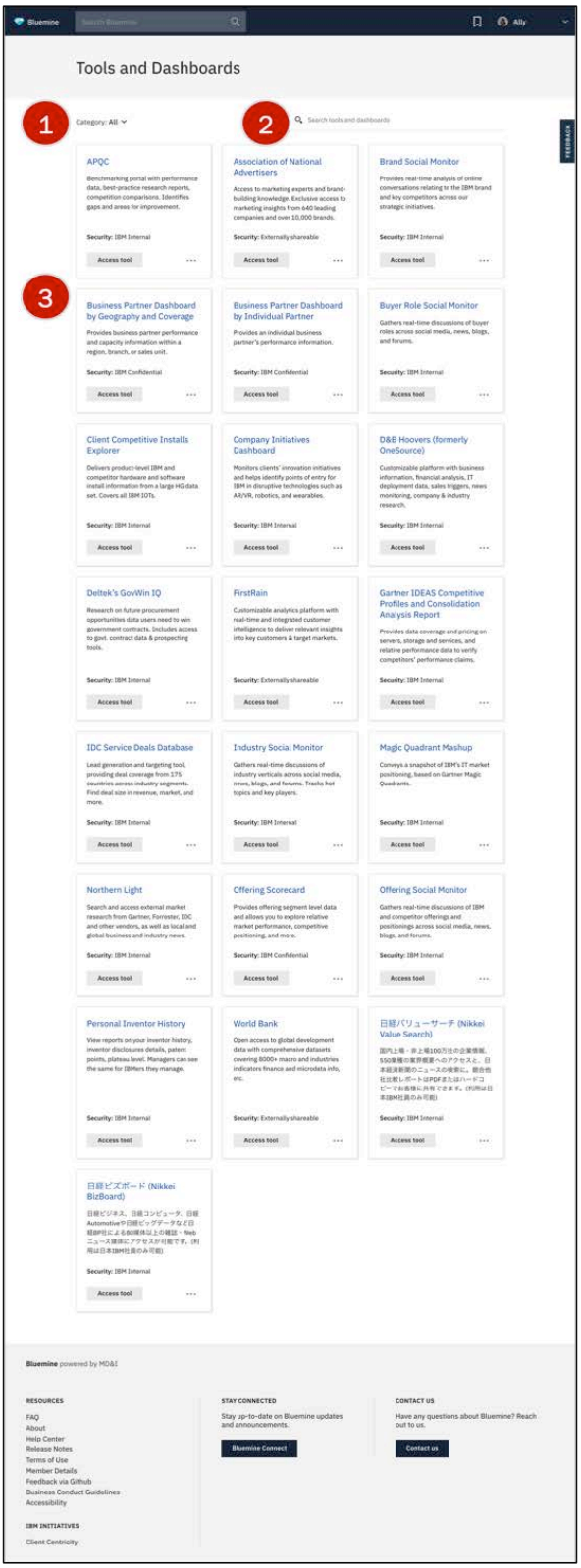
Image 151. IBM Bluemine Digest. The digest comprises the list of new reports related to topics to which the user is subscribed.
151_IBMBluemine_14_automateddigests_live.png

Digest, Highlights

The digest enables employees to stay up-to-date without having to troll Bluemine frequently.

1. **Title and date:** The *New on Bluemine* title makes it clear that this digest contains only new reports. The subtitle includes the day of the week and the date written in an international format.
2. **Summary:** Each report in the digest lists the report title (which also acts as a link to the report page), part of the report's opening paragraph as a summary, the source of the report, and the tag that triggered the report's appearance in the user's email digest.

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Tools and Dashboards

Image 152. IBM Bluemine Tools and Dashboards. The site's *Tools and Dashboards* page consolidates the list of tools and dashboards that employees can use to leverage their research. *152_IBMBluemine_15_toolsdashboards_live.png*

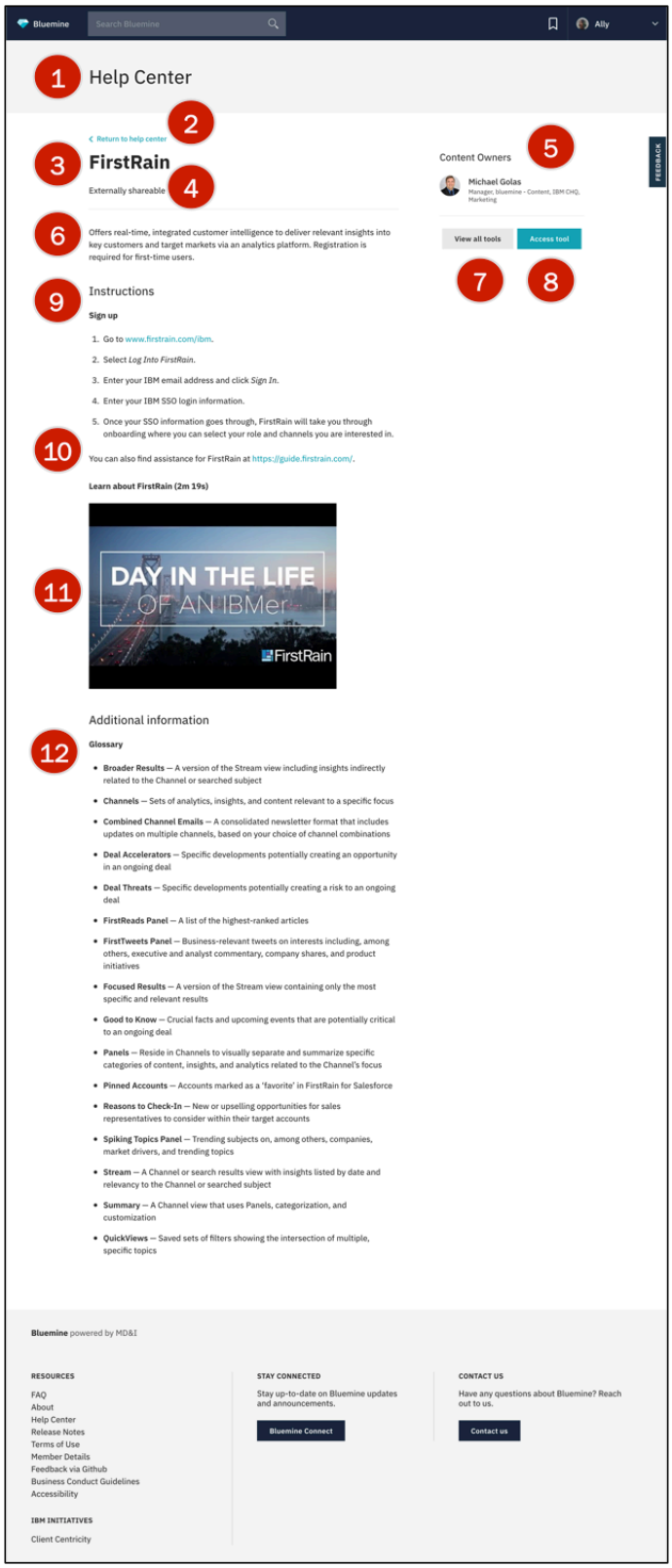
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Tools and Dashboards, Highlights

Bluemine's *Tools and Dashboards* page consolidates various tools and dashboards—created internally or by third-parties—that employees can use to further leverage their research.

1. **Category filters:** The smart default displays tools in *All* categories, so users are not accidentally leaving off some from the start. The page's many tools, however, make it easy to refine the list. Users can click the drop-down menu caret icon to reveal nine category choices: *industry, technology, offerings, clients, partners, buyers, sales, brand,* and *companies.*
2. **Search:** A search function, separate from the main site search, lets users narrow the *Tools and Dashboards* on the page.
3. **Cards:** Each card displays the name of the tool or dashboard, a short summary of it, the security level of the information, and a button to access the tool.

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Help Center

Image 153. IBM Bluemine *Help Center*. The *Help Center* has information about every tool and dashboard on Bluemine. *153_IBMBluemine_16_toolhelp_live.png*

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Help Center Highlights

Every tool and dashboard, whether built internally or offered via a third-party vendor, is accompanied by documentation and instructions in the *Help Center*.

1. **Page title:** The *Help Center* title clearly reminds users where they are on the site.
2. **Return link:** The link, *Return to help center*, makes it easy for users to navigate back to the list of help for *Tools and Dashboards*.
3. **Name:** The tool's name is the most prominent item at the top of the page in large bold black text.
4. **Security:** Different dashboards and tools are assigned different access and security levels. One level of security relates to sharing information, as some items can be shared only internally.
5. **Content owners:** Each tool has a content owner who helps maintain the internal tool or oversees the vendor relationship for a third-party tool. The person's name, photo, and title appear in the upper right of the tool's page, so users may contact him or her if need be.
6. **Summary:** A few sentences summarize the tool and what it can be used for.
7. **View all:** The *View all tools* button takes users to the list of all tools and dashboards.
8. **Access:** The *Access tool* button opens the tool described on the page.
9. **Access information:** The page's *Instructions* section offers numbered steps describing exactly how to access the tool; because Bluemine offers free access to third-party tools that typically require a subscription, instructions are always included to ensure that IBMers get open access. These steps are so clear that they eliminate any confusion or need to call support for help, which is a major time savings for everyone involved.
10. **Guide**: For even more information, users can follow the link to read a guide about the tool.
11. **Video:** To cover every possible information base, the page also offers a short video describing the tool. The video includes information about how various employees might benefit from using the tool, so employees can understand opportunities for leveraging it.

Additional information: Because some tools have robust features that make them seem complex at first, this section offers supplementary information to help employees use the tool more successfully. The section may include anything from command queries to glossaries, which gets users up to speed on what the tool can do and what the terms within it mean. The section also provides information about which data sources the tool is extracting from.

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Learn More

Image 154. IBM Bluemine Learn More. Bluemine's value is clearly described so everyone can understand its potential benefits. *154_IBMBluemine_17_learnmore_live.png*

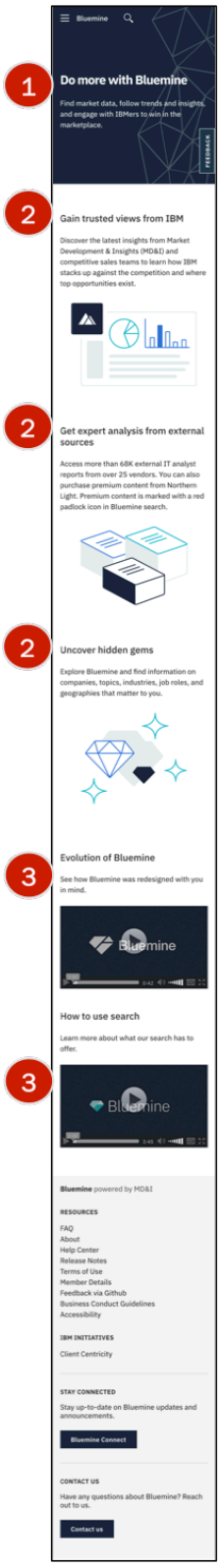
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Learn More, Highlights

Users new to Bluemine can learn the value of using it by reading this page.

1. **Summary:** The hero at the top states *Do more with Bluemine,* making it clear that this application can add value to the employees' work. The text below that describes how it lets users follow market trends and engage with other IBMers. This is especially helpful for users new to Bluemine and those who were accustomed to the legacy version.
2. **Content summarized:** Three small text sections summarize the vast and various types of Bluemine content and how people can use it. These summaries could have been much wordier, but instead the team chose to keep it simple, concise, and modern, with just a tagline and a summary sentence or two.
3. **Video help:** These two short, carefully selected videos describe how the site was redesigned and how to use the new search function. Any relaunch can benefit from advertising why the redesign is better, how to get the most from it, and how to most effectively use key features.

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Mobile Learn More

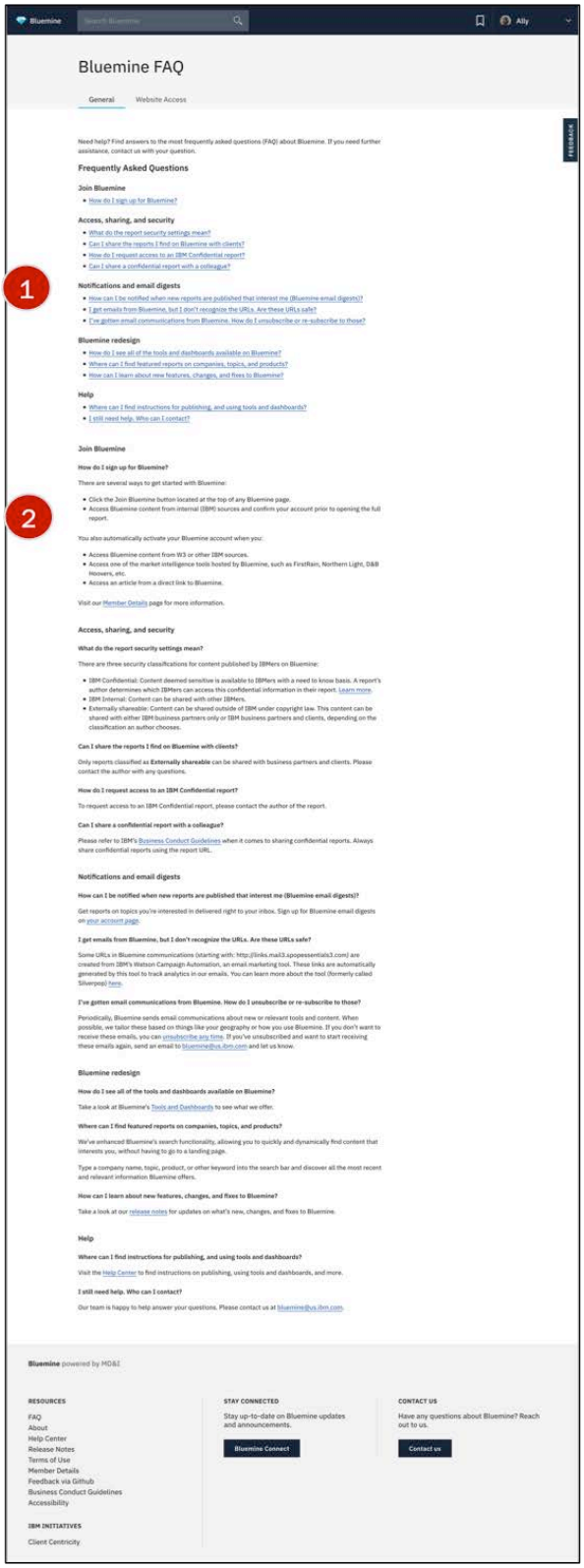
Image 155. IBM Bluemine Learn More Mobile View. The learn more area is almost the same on mobile as it is on desktop. *155_IBMBluemine_18_learnmore_livemobile.png*

Mobile Learn More Highlights

Even if users access the site on mobile, those new to Bluemine can learn the value of using it by reading this page.

1. **Summary:** As on the desktop, the page's *Do more with Bluemine* title makes the application's benefit clear and is followed by text describing is value to users, that they can follow market trends and engage with other IBMers. This is especially helpful for new users and to those who used the legacy version.
2. **Content summary:** On mobile, the images follow the text in the three small sections describing Bluemine content.
3. **Video help:** The two short videos describing the site's redesign are stacked vertically on mobile.

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FAQ

Image 156. IBM *Bluemine FAQ*. The *Bluemine FAQ* includes common questions and their answers. *156_IBMBluemine_19_FAQ_live.png*

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FAQ, Highlights

The FAQ addresses a few highly valuable—yet slightly less transparent—Bluemine elements, such as URL safety and getting confidential reports.

1. **Anchor links:** The page's top section summarizes the questions and sorts them under subheadings, making them easy to scan by topic.
2. **Formatting Answers:** Sorted under topic headings, the questions are in bold text and the answers are written concisely, sometimes using bullets to help users easily glean the key points.

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What's New

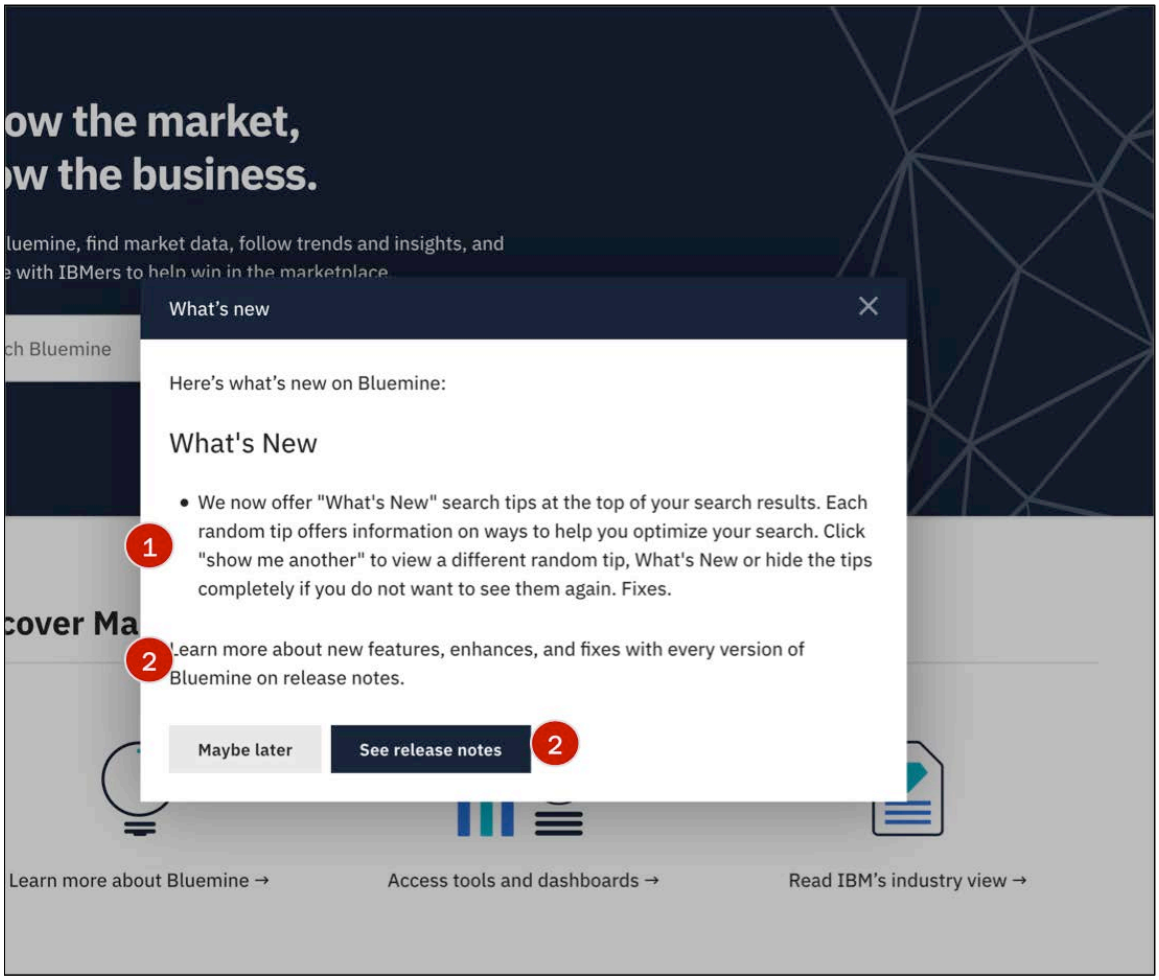


Image 157. IBM Bluemine *What's New*. Users who want to keep up on new features and release notes can click the *What's New* notification. *157_IBMBluemine_20_whatsnewmodal_live.png*

What's New, Highlights

The Bluemine team releases app updates every two weeks that introduce new features and bug fixes. The *What's New* feature lets anyone read about these changes. A notification badge appears on the employee's profile avatar in the upper right of the page, which users can either click or ignore. Clicking the badge opens a menu with a *What's New* option.

1. **Tip:** The latest *What's New* tip opens in a modal after users click the notification in the upper right. The tip describes the feature—in this case, search tips.
2. **Release Notes:** Users interested in reading more about the latest new features, past release notes, and bug fixes can click the *Release Notes* button at the bottom of the modal.

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DESIGN PROCESS AND USABILITY WORK

A Research-Based Approach

The Bluemine team used various research methods to inform their design decisions. Some common activities—such as checking server logs and usage stats—led to surprising insights because the team didn't simply take the data at face value and run with it. Instead, it dug deeper and its inquiries yielded interesting results.

Research was a natural starting point for the Bluemine design team because the organization employs the Enterprise Design Thinking framework (observe, reflect, make) as a matter of course.

Checking Server Logs and Usage Stats

The Bluemine team has two primary ways of capturing and synthesizing application usage:

1. IBM Tealeaf analytics software
2. Custom-built dashboards that visualize user logs

Hard data captured from user logs were especially useful in guiding which content should be kept, refined, or archived prior to migrating content from legacy Bluemine to the new platform. However, while performing the content audit, the team realized that hard data should not be taken at face value; just because an internal report had only 65 views and two likes did not mean the content wasn't useful or valuable.

Static numbers depicting total number of visitors and views don't show traffic spikes due to marketing campaigns, external news and events, or seasonal trends (such as people looking up quarterly earnings). So, while the team extracted and analyzed metrics during the content audit, it didn't use metrics as the sole determining factor on whether to keep or kill content; rather, it was used as an opportunity to pose user research questions to try to discover why some content tended to out-perform other content. Simply asking why certain pages and reports were more popular than others helped the team focus on whether or not there were navigational or findability issues the redesign should address.

For example, one of the pages the team decided to keep was a tools portal for data-proficient users. This page was not listed in legacy Bluemine's main navigation, nor was it featured on the homepage or even included as part of a marketing campaign. This was because it was still in beta. Yet, despite the page not having been officially released or promoted, it still generated decent foot traffic—and the team couldn't figure out why. After asking people in interviews how they stumbled on this particular portal, a majority said they learned about the page through word-of-mouth. And it turned out that once users found the portal, they found it easy to navigate back to it and were determined to do so because the page's content was essential to their daily work, and they wanted to access the page's data sets and tools. So, once users found the page, they shared the portal link with other team members.

Monitoring Support Needs

Since shipping the minimal viable product (MVP) in December 2017, the Bluemine director, in partnership with the marketing team, has held quarterly workshops and roundtables for IBMers to:

- Learn about the latest Bluemine updates
- Provide feedback on using Bluemine

Representative designers and developers from the Bluemine team audit these calls to hear user questions, concerns, and feedback. Then, the Bluemine marketing team (often) pulls together a summary deck of user insights and shares it with the larger Bluemine team.

Surveys

As one of its first project research activities, the team conducted a survey to better understand the types of market information IBMers looked for on Bluemine and what information they wanted to see in the new version. The survey's goal was to identify potential users needs. The team also wanted to recruit participants for generative interviews.

Of the 527 completed survey responses, 40 IBMers volunteered to be further interviewed by the design team. Many of theses 40 Bluemine users became important project contributors—providing feedback and participating in multiple research activities throughout 2017. These participants were heavily invested in improving Bluemine as they saw its potential but felt like they weren't able to maximize the existing version's value.

Although not a detriment to the survey's goal of recruiting users, there were lessons learned through some of the mistakes made with the survey design. When the team created the demographic questions, it did not include choices for more targeted segmentation. The survey included roles for *Sales*, *Marketing*, *Services*, *Offering Management*, and *Other*, but it did not include an option for *Market Development & Insights* (MD&I). Although MD&I is a Marketing sub-segment, its staff members use Bluemine differently than other people and make up a large percentage of content publishers. Thus, being able to segment out MD&Iers would have been useful. Other demographics, such as geography and length of employment, would also have helped the team better cluster user types.

The other lesson learned related to a mistake in the design of the survey's flow. The survey asked respondents to volunteer their email on a separate page prior to submitting the survey for completion. However, many respondents closed the nearly finished surveys before clicking *submit*, so the team had to go through more than 100 of these partial surveys individually to extract their data.

Generative Interviews

Much of what the team initially prioritized in the redesign stemmed not from the survey results, but from the conversations that happened during the first generative interviews that followed.

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Generative Research Key Findings:

- Bluemine's experience was inconsistent and outdated.
- Many landing pages often got in the way of getting directly to the desired content, especially for pages that were rarely maintained.
- Search didn't always come back with relevant results; at times, reports dating back five years would appear in top results, thwarting user expectations.
- Finding market answers was time-consuming. Because of how search was structured, IBMers often had to read through many reports to find a key nugget of information.
- The publishing process was also time-consuming: it took 30–90 minutes to post content that had already been written as a report, and another 24 hours before the content would go live.
- The publishing tool's categorization and selection criteria were out-of-date and complicated to use.

These findings were prioritized over others for two primary reasons:

1. The team tended to weigh widespread concerns more heavily than those that were infrequent.
2. The team mapped findings to feasibility (how easy an issue was for the team to address) and importance (its potential value to users). Mapping pain points in this manner helped facilitate deep discussions within the team and formed the foundation of what would go into Bluemine's MVP.

Usability Testing

In addition to the research methods described above, the team conducted several rounds of user testing on design prototypes to test various Bluemine features. Following is what it tested and what it learned:

- **Testing search relevancy:** Early on, the design team tested low-fidelity search using paper prototypes with users. The team realized that the flow was intuitive to users, but it was difficult to know if the experience truly met their expectations. This is because the search results relevancy is a primary factor in determining whether search works well or not, and the team was not able to test that with a static prototype.

- **Optimizing search results ranking:** Once the team had a working prototype with a sample of 2,000 reports, users went through a second round of usability tests with search. They were able to perform all of the tasks, and they found most of the design intuitive; however, during testing, several users felt that the search results ranking did not meet their expectations. Many wanted to see popular sources ranked higher than pure matches. Finally, given the limited number of reports being indexed in this sandbox environment, the users often felt that the results were lacking.

  The team had to acknowledge this shortcoming because the bulk of reports would not be indexed until all content was migrated into the new Bluemine. The solution was for the team to launch with their best attempt at a search algorithm, all the way through the first release, and rely on feedback to continuously improve search while it was live. This was a risk because you don't always get a second chance to make a first impression with users. The team knew that if users didn't trust search, there was a possibility they would not return to use it again.

  Search has come a long way since the initial prototype. While much improvement remains to be made, the team has been able to continuously improve search through online workshops, Slack feedback channels, and release notes. Release notes often let users know which specific aspect of search was improved and how, which helps them feel like the team is listening to their feedback.

  Admittedly, there are users (albeit a minority) that tried search once and have not returned. The team is still working out ways to regain trust with those users.

- **Testing the publishing tool:** Similar to the search testing process, the design team tested low-fidelity publishing tool prototypes with publishers. The first round of testing was aimed at evaluating two different proposed navigation flows for the new publishing process. The team thus conducted a series of A/B tests that investigated the two navigation flows and styles. Between interviews, the team alternated which navigation the user saw first as an attempt to control how A/B order might affect responses. Three main insights emerged from these test sessions:

  - **Users found that both of the proposed navigation flows were simpler and better than legacy Bluemine.** Some users did not even notice the difference between the two different navigations until the interviewer pointed it out.
  - **Users found the top navigation more intuitive.** The majority of users said that they preferred the top navigation because it was in a location where they would expect to see navigation prompts.
  - **Users found the required preview screen useful.** Nearly all users said they appreciated that the flow forced them to preview the report before it was published.

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While both designs made sense to publishers, the team knew a working prototype was needed to get a real sense of how difficult or easy the tool would be to use in practice. Once the team developed a working prototype in Bluemine's staging environment, the team approached six publishers who had previously participated in usability tests. The ask was simple: upload pre-made content to Bluemine. The research team timed each task and found that all publishers could upload reports in less than 15 minutes. Publishers who took longer typically spent time formatting pre-made content by adding additional images, editing font styles and sizes, and styling data tables in the tool.

Every publisher who participated in this task-based test said the publishing tool was not only an improvement but was also extremely easy to use.

- **Testing bookmarks:** The design team crafted an interview protocol to try to understand users' general behaviors and also:
    - How they save research material to view later
    - How they prefer to share material with team members
    - Their expectations for a bookmarking feature

  Participants were shown a prototype and asked questions about tasks they performed on each page of a flow. One key finding centered on the use of language and the word choice of "bookmarks" versus "collections" or "folders."

  The research also revealed that users heavily rely on:

    - **Browser bookmarks** for saving searches and individual results
    - **Box Notes** for creating annotated lists and collaborating with team members to develop a perspective on the topic
    - **Mural for synthesizing research findings** from several sources (as an individual and within a team)
- **Usability testing the new site:** In January 2018, a month after Bluemine's MVP was deployed, the team conducted a round of research that would help gauge user adoption at the behavior level. The goal of that research, dubbed *10-10-10 Testing*, was to follow a group of users over a period of time to see how their habits and behaviors changed. The team interviewed users during the following time periods:

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- **In the first 10 minutes:** These first moments would help the team understand immediate impressions of using the new application design and how first-time and long-time Bluemine users perceived the platform. During the first 10 minutes, the team assessed intuitiveness and ease of use by observing how users interacted with features and navigated the redesigned site.
- **After 10 weeks:** The team initially wanted to check in on users earlier than 10 weeks; however, due to timeline constraints and resources, the second interaction was scheduled for 10 weeks later. This second interview probed users on short-term adoption and use. Are they still using Bluemine? If yes, how frequently did they use the site and what parts are they using the most? How has Bluemine started to integrate into their workflow? Which aspects are meeting their expectations and which are not?
- **After 10 months:** This research sprint was conducted in October 2018. The goal was to compare results from this sprint to those seen during the 10-weeks sprint. The team aimed to assess if and how people used Bluemine after a long period of time: Are they still using Bluemine? What are the characteristics of frequent and power users? What parts of the platform do people use and how have they adopted Bluemine into their workflow (or conversely, adapted their workflow to Bluemine)? As of this writing, the specific results of this research sprint are not yet available.

In the first round of 10-10-10s, users were generally positive about the redesign. Many commented on bringing Bluemine to modernity and simplifying the experience. One interviewee said, “It is one of our better efforts as a company.”

Despite the positive feedback, **three primary areas of improvement emerged from the study:**

- **Price confusion:** 12 of 12 users were confused about the interdepartmental charge and overall pricing of Bluemine.
- **Lack of search prominence:** Users lacked confidence in starting their journey using Bluemine; in fact, 6 of 12 users did not initially notice the search box on the homepage.
- **Search relevance:** While searching, users who entered compound search phrases such as [topic + geography] did not feel the search results were relevant enough.

A cross-comparison of the results of the first round of 10-10-10 to webpage heatmaps and user logs guided the team in prioritizing the first releases post-MVP. Priorities included refining the homepage, improving search relevancy, and focusing on copy and microcopy that would help IBMers better understand Bluemine’s value and capabilities.

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In the second round of 10-10-10, the team reached out to the same set of users. For this round of interviews, only 7 of the original 12 users could participate due to holidays and scheduling conflicts.

Four main themes emerged from this second research sprint:

1. Of the 7 users, 4 had changed their job role, scope, or project work. Only frequent users noticed feature changes and could articulate those distinctions between Round 1 and Round 2 of 10-10-10s.
2. Users who could articulate changes in features and functions seen in Round 1 versus Round 2 a) used Bluemine daily, and b) primarily focused feedback on parts of the experience that were not meeting expectations.
3. Users still struggled to start their journey beyond the search bar, and search relevancy was still an issue.
4. The team noted that sporadic usage is not detrimental to Bluemine. The Bluemine team must be mindful of the fact that many IBMers change job roles within the company. As with the priorities that came out of Round 1, the team again amended designs and language to support the transition between discovery, onboarding, and regular usage.

Many of these concerns about search relevancy were already previously documented. And, while search relevancy continued to improve, it still did not meet user expectations. Users felt company cards showed up when they weren't relevant and that priority should be given to recency instead of ranking results purely on keyword matches. Users also could not filter at the global level or exclude specific geographies. These findings led the team to refine both the search interface and the algorithm backing it. In addition, it led the team to design an in-app feedback function to track at scale which search results were not meeting expectations.

Reworking the Information Architecture

Legacy Bluemine had two content types—landing pages and report pages—and both lived off the homepage in a flat architecture. However, from the user's viewpoint, landing pages were accessible only via the top menu and report pages were accessible only from either select landing pages or via search.

Previous Bluemine teams had limited resources available to maintain the landing pages. So, as a workaround, content creators began repurposing some of their report pages as landing pages, promoting these pages in marketing outreach, education sessions, and in other ways. This workaround caused significant problems:

- Users couldn't find what they were looking for using search.
- They had difficulty navigating the website.
- There was redundant or duplicate content across landing pages.
- The many forgotten or orphaned pages resulted in cluttered search results.

User research conducted during the redesign revealed that content owners felt it was important to group the reports so they could find and promote them in a single location on Bluemine. However, users valued the reports themselves—and not necessarily the buckets or landing pages where the content owners grouped them. In fact, for many users, a report classified as being under Landing Page A, might also be applicable to Landing Page B, but unless the content owner of Landing Page B included the report, users of Landing Page B might never find it unless they found it through search or simply stumbled upon it on Landing Page A.

Reworking the IA to solve these sorts of challenges was essential to the redesign process. To solve existing IA issues, Bluemine's content strategist and design lead coordinated a small team of seven members drawn from executive, technical, content, and design areas. The content inventory and a diagram of the legacy architecture helped start the conversation by allowing involved parties to see the complex spider-web the legacy Bluemine had become. It also helped inform the taxonomic structure the team would eventually adopt through the redesign. However, there wasn't a "secret sauce" UX activity that helped them solve all the IA ills. Instead, the seven team members met for several weeks to review, refine, and stress test the IA proposed by the team's content strategy and design lead. Because the proposed IA was laid out in a web application called Mural, the full team could remotely collaborate and edit the IA framework together in real time.

In the redesign, the team chose to sunset most landing pages; it also shifted the focus to improving search and leveraging Elastic Search technology. To address content owners' need to locate their content in one location, two solutions were incorporated:

1. The team personalized the publishing tool, so that it would display only the content created by the content owner(s). In the publishing tool, content creators can categorize reports with tags and facets. These tags and facets would also be available in search, enabling IBMers to add or subtract reports by internal source, external source, geographies, security level, pay wall, and related companies.
2. The team shared many of the research findings with content owners and showed that what users valued most was the information itself, not which content owner created it. If the purpose of the content created was to inform users, users should no longer be inhibited by having content ownership valued over Bluemine's mission. Going forward, the marketing team promoted content by focusing on the subject, not content created by any particular owner.

Adoption and Buy-In

Because the application is positioned as IBM's trusted digital source for fact-based insights about clients, competitors, and markets—and knowing that this redesign effort was long overdue, as the old site wasn't meeting user expectations—the intranet team had leadership buy-in from the beginning.

That said, the team did experience some early difficulties with user adoption. Given that the site is a subscription-based business model, the team found that there's a nuance to presenting the annual fee in a way that ensures users understand the value and ROI they can expect once they sign up. The value or value proposition must be explained in a succinct, compelling way so that within seconds of coming across the call to action (to subscribe), users feel confident that subscribing is the right business decision. Also, receiving and reading market insights is habit forming, so users who were accustomed to the older application's look and feel felt that "something was missing" with the new site's minimalist design. They were also having trouble trusting that this newly designed site could deliver the same rich content on its uncluttered pages.

GOVERNANCE

Ownership

As part of IBM MD&I, the Bluemine team owns this intranet site. Ownership is defined as having the right and responsibility to choose and procure content for the site and take on its fiscal responsibilities.

This is the same team that designs, builds, and runs Bluemine. This is an advantage in that the site is being managed as a business, with its own profit and loss. The team's level of autonomy is therefore greater than some intranet teams. The number of external parties that the team has to coordinate with or seek buy-in from to move forward is kept to a minimum. This helps with the team's agility and speed a great deal.

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INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Product Management Team	This group is comprised of Bluemine's product owners, project managers, and design and technical leads. They provide the following support functions: • Oversee the Bluemine roadmap, release planning, and overall product strategy • Manage team organization, allocate resources, and improve team dynamics and processes
Design and Research	• Identify existing users' pain points and design opportunities • Design features, layouts, and the Bluemine application's flow • Lead workshops with users, team members, and stakeholders
Development, Technology, and Support	• Develop and deploy features and content • Oversee user support and feedback repositories • Work with product management and design teams to prioritize and scope work
Marketing and Content Owners	• Create, maintain, and promote content in their sections • Maintain relationships with Bluemine publishers and vendors • Manage content posts related to their sections (including geography, industry, market topics) • Host quarterly webinars and round tables to elicit feedback from users • Train and educate other team members
Analytics and Billing	• Conduct monthly report share-out with Bluemine team and stakeholders • Maintain relationships with department- and finance-level IBMers • Maintain relationships with subscription and licensing vendors

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Bluemine Super Admin	This group is comprised of representative team members from Support, Analytics, and Marketing/Content Owners who: • Review content and publications pushed to Bluemine • Manage user accounts

Working with Outside Agencies

The product owners and design lead made a deliberate choice not to use agencies or consultants for this application. Although the team conducted a round of RFQs, it found the agency bids lacking based on several key factors:

- **Domain knowledge:** Given that Bluemine is an application for delivering market insights, an understanding of content and the context are crucial for a successful design. The agencies that bid on the opportunity did not exhibit this competence.
- **Ongoing maintenance and future releases:** Handing these off to agencies would not be cost-effective.
- **Relationship with users:** An understanding of users' evolving needs should be built into the product, which requires a consistent presence in user communities. Given budget constraints, agencies would not be able to provide this.

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	https://w3.ibm.com/marketing/bluemine/
Default Status	Bluemine is not the default homepage set for IBMers, but it is linked directly on IBM's intranet homepage. As seen in both metrics and user interviews, many Bluemine users bookmark Bluemine and its report pages in their browser.
Remote Access	IBMers can access Bluemine remotely using their mobile devices and laptops by first connecting to the IBM network through AT&T or Cisco's AnyConnect Virtual Private Network and then logging in through IBM's single intranet sign-in credential that is used by all internal applications. Many users access Bluemine this way when they are on the go, working remotely, or visiting clients and business partners.
Shared Workstations or Kiosks	It is uncommon for users to access Bluemine through shared workstations and kiosks, but they have done so during IBM events.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2003	• First Bluemine intranet
March–December 2017	• Seven research sprints ran throughout the redesign timeframe, including testing features such as legacy and prototype search, the publishing tool, bookmarks, and website navigation
December 2017	Bluemine redesign MVP launch included: • Improved search • Improved publishing tool • Access to a directory of 30 market tools, dashboards, and third-party subscription sites • Access to 68,000 external market reports and 2,000 internally written reports
January 2017	Two releases that included: • Report metrics views for publishers • Super admin functions and capabilities • Changes to paywall view • Round 1 of the 10-10-10 research testing
February 2018	Two releases that included: • Updated homepage • Custom date filters in search • Copy/share link functions to reports, pages, and tools • Direct email subscribe/unsubscribe • Improved super admin page navigation • Improved search relevancy

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March 2018	Two releases that included: • Ability to save and bookmark reports • Database-driven site statuses and notifications • GDPR compliance • *Tools and Dashboards* cards in search • Improved search relevancy • Round 2 of 10-10-10 research testing
April 2018	Two releases that included: • New industry page highlighting 19 industry-specific reports written for Bluemine audience • Filter functions on *Tools and Dashboards* directory page • Japanese-language names and descriptions in search results for Japan-specific tools and dashboards • *What's new* notification • Featured reports curated by Bluemine team on homepage • Improved search relevancy
April–August 2018	• Redesigning Bluemine proprietary data tools experience to be consistent in branding and functionality
May 2018	Two releases that included: • Updated FAQ based on recent commonly asked questions • Improved email digests split out by topics • Improved documentation in *Help Center* • Improved search relevancy

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June 2018	Two releases that included: • New competitive intelligence page that highlights perspectives from IBMers on individual competitors and across competitors • Updated navigation bar so industry and competitive pages can be accessed from any Bluemine page • Improved search relevancy
June 2018–present	• Design team planning for Bluemine expansion to include conversational channels
July 2018	Two releases that included: • Changed location of locked-document filter in search to improve visibility • Improved *Tools and Dashboards* directory experience on mobile devices • Bluemine site status page informing users if Bluemine parts are experiencing issues/maintenance • Ability to provide in-app search feedback • Improved search relevancy
Overall redesign timeframe: 9 months (March–December 2017) from project kickoff to MVP launch	

CONTENT AND CONTENT CONTRIBUTORS

Contributors

Bluemine has three types of content contributors, and the Bluemine product management team uses a different engagement/business model for each:

- **Data tools built and owned by IBMers or third-party vendors.** Each year, the Bluemine product management team makes select and deselect decisions based on user feedback and usage metrics. The selection criteria include factors such as a compelling business need, cost of acquisition and ongoing maintenance, GDPR compliance, and content relevance to Bluemine users. To date, there are approximately 30 tools of this type.

- **Syndicated third-party market research reports**. The Bluemine product management team also makes annual select and deselect decisions based on user feedback and usage metrics for third-party report vendors. In addition to costs, selection criteria include factors relevant to Bluemine users such as a compelling business need and coverage depth and breadth (that is, niche or global coverage on any market segment). To date, there are approximately 68,000 of these reports produced by 25 third-party analyst firms.
- **IBM-generated market perspectives.** Bluemine houses market analyses and perspectives written by several hundred analysts from the IBM MD&I team and a select group of other IBMers who work in competitive product analysis or sales support. For this group, publishing relevant content is a part of their job function as a "soft requirement"—that is, there's no quota on the number of publications, but publishing is highly encouraged.

Contribution

There are two primary methods the Bluemine team uses to encourage contribution:

- **Dashboard:** The Bluemine metrics team creates and manages a dashboard that dynamically shows usage of reports and tools (by author name) and offers YTD and year-over-year comparisons as applicable. This dashboard is ordered by rank from most popular to least popular. Additional analysis such as "first visited asset" and "repeat visits to bookmark pages" are shared with Bluemine publishers via this metrics dashboard so that publishers can see where their content ranks compared to other content contributors. The same metrics are shared with the MD&I leaders that the authors report to facilitate recognition at the departmental level and celebrate the best-producing content creators.
- **Outreach:** The Bluemine marketing team proactively reaches out to MD&I analysts when planning marketing campaigns so that timely, relevant, and actionable content is merchandised in the appropriate places throughout the company. This outreach has helped content owners and publishers be more mindful of how they plan to write about a subject to address users' interests and needs before they actually begin writing. Also, post-marketing campaign successes are shared so that content creators can see their immediate business impact in driving traffic to Bluemine.

Aside from these two proactive methods, research and informal conversations show that publishers also have a vested interest in sharing their viewpoints to build personal eminence in the IBM workplace. IBMers that the team spoke with were enthusiastic about sharing knowledge with others and using Bluemine as a platform to voice thought leadership, analyses, and foundational information.

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Simplified Publishing Tool

Many intranets focus on the user's experience; however, part of making sure users have good content is ensuring that its creators have a well-designed publishing tool. Legacy Bluemine required that all publishers create reports from an IBM Notes Domino database, separate from the Bluemine application. Depending on the time of day they submitted their report, publishers had to wait anywhere from 1 to 24 hours for it to appear on Bluemine. Every publisher the research team interviewed said that using the publishing tool was time-consuming and overwhelming, especially when content was created beforehand. Indeed, using the previous version of Bluemine, it could take publishers 30–90 minutes to complete the fields required to publish a report.

The new publishing tool is web-based and located within the Bluemine app. It simplifies the form into a three-step process of adding content, applying settings, and previewing the final report. Publishers said that the new publishing process is easy, and that they can fill out a report form for pre-made content in 5–15 minutes—which is up to six times faster than before. Once the report is submitted, the content immediately goes live on Bluemine and is available in search.

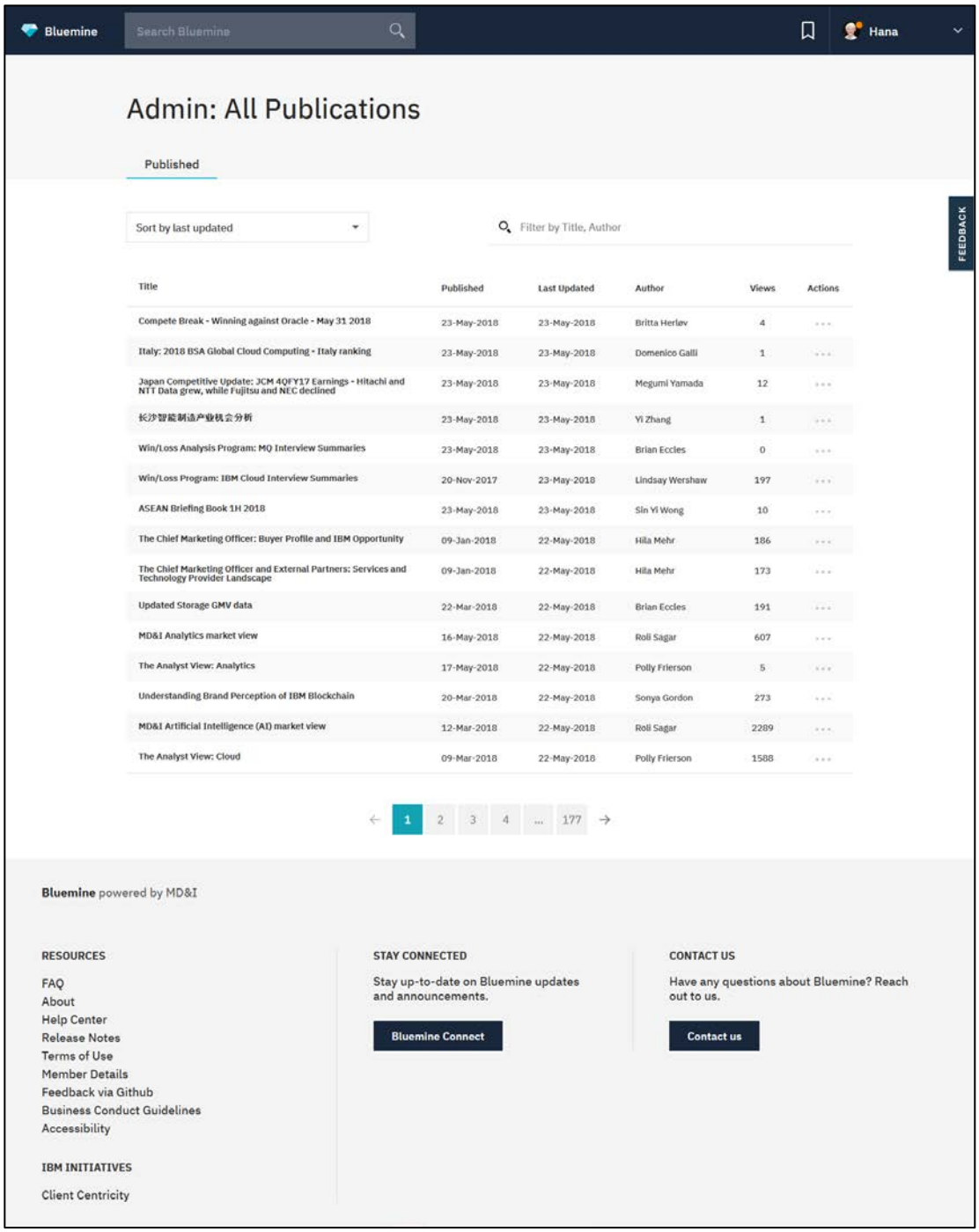


Image 158. IBM Bluemine Administrator View. The Bluemine publication administrator's view of all active internal reports published by IBMers and sorted by most recently published. Administrators can edit, manage, and delete any report. *158_IBMBluemine_21_publicationadmin_live.png*

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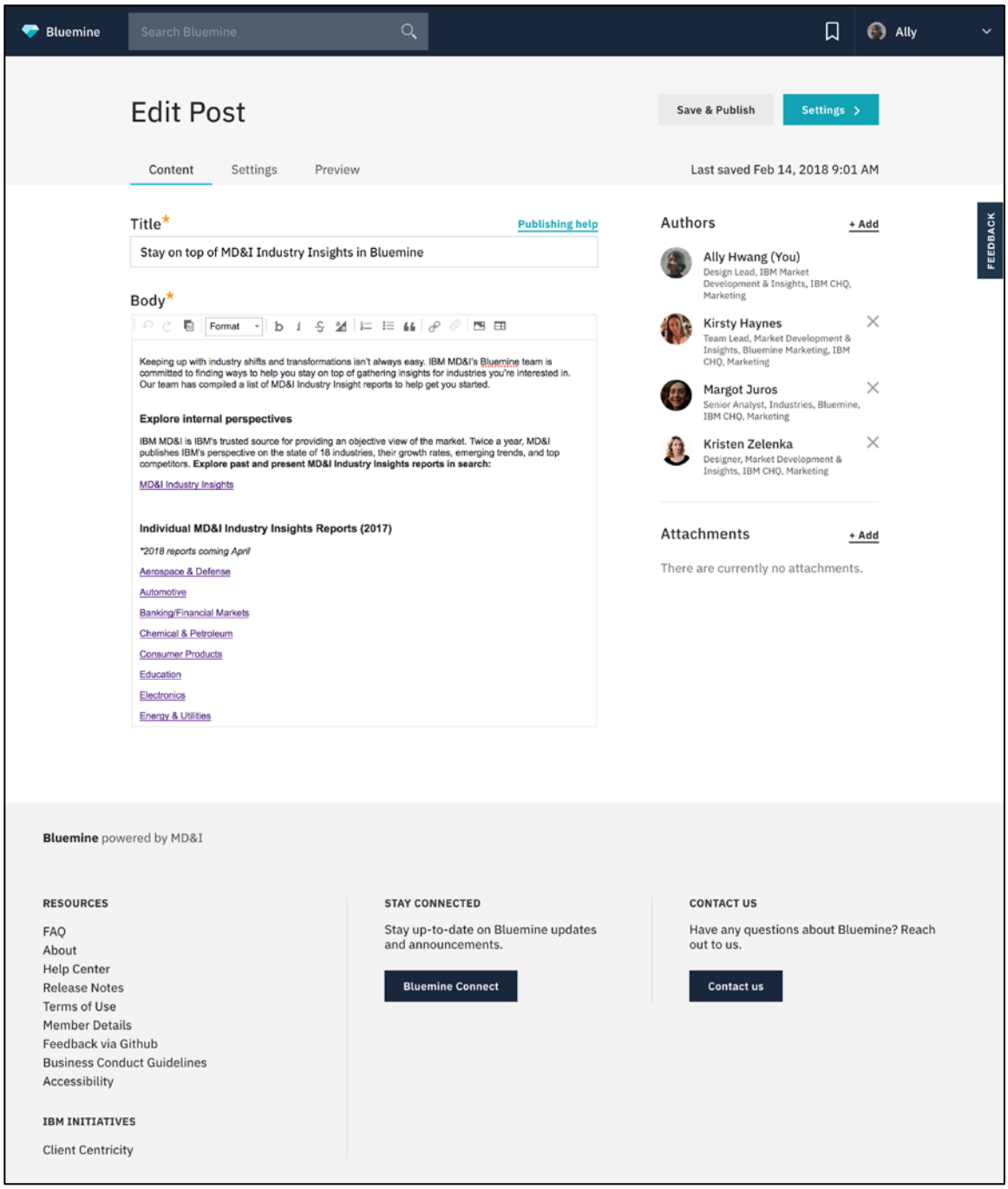


Image 159. IBM Bluemine Publishing Tool. Bluemine's publishing tool includes a three-step form that lets publishers add content and assets to a Bluemine report page, adjust the settings, apply metadata, and preview the report before it is published. *159_IBMBluemine_22_editpublication_live.png*

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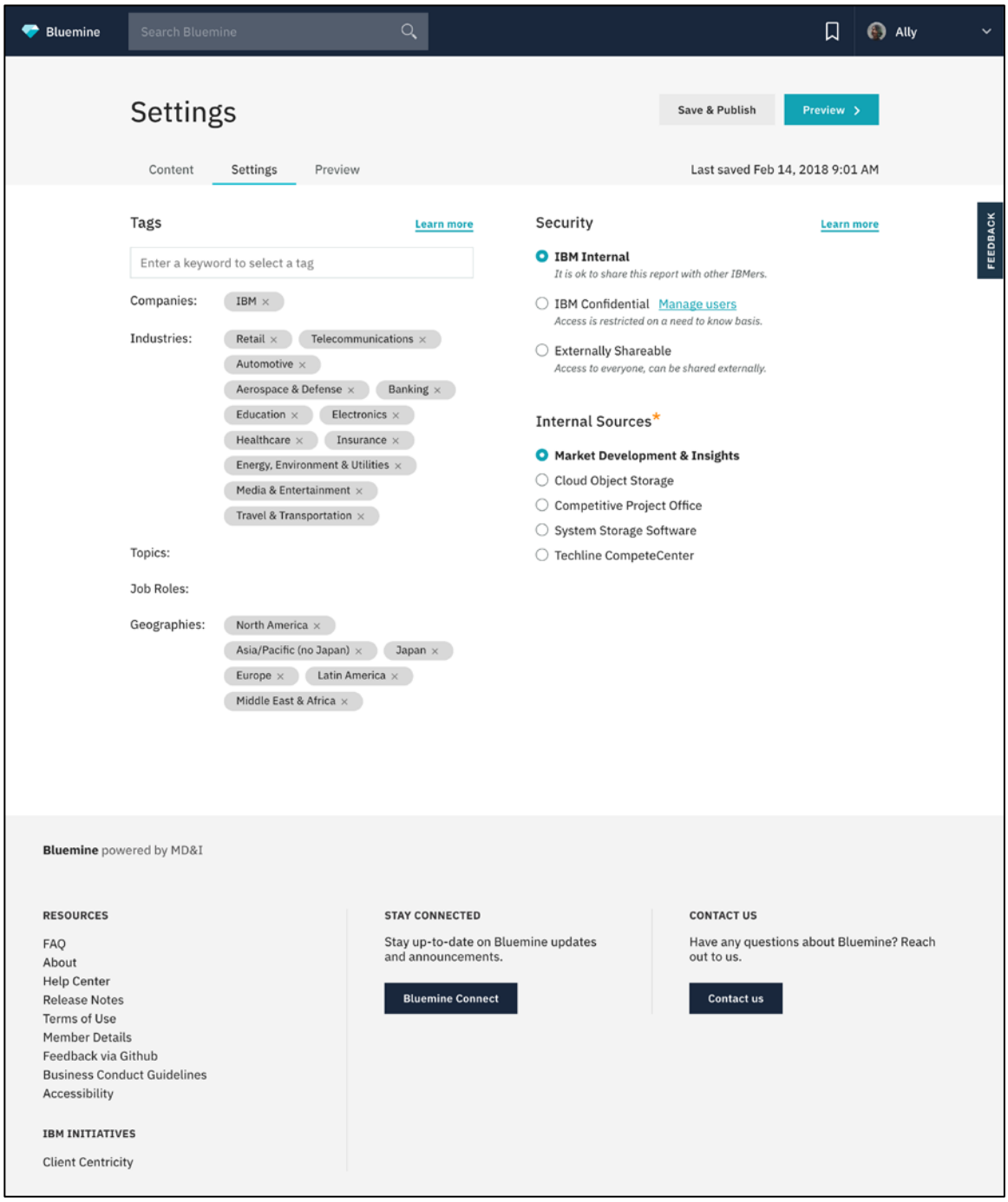


Image 160. IBM Bluemine Publishing Tool Settings Tab. The settings tab in the publishing tool lets publishers add tags and select the confidentiality level and the internal group they are writing on behalf of prior to publishing the report. *160_IBMBluemine_23_publicationmetadata_live.png*

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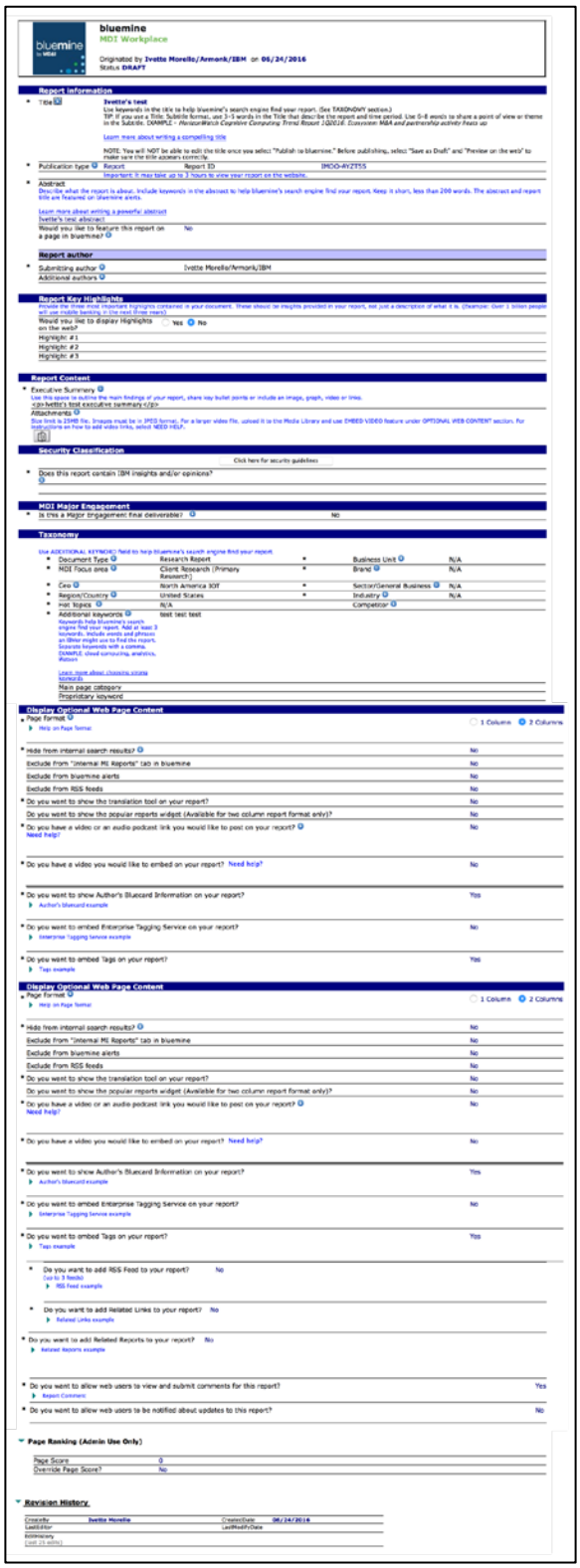


Image 161. IBM Bluemine Legacy Publishing Tool. The legacy Bluemine publishing tool required all publishers to create reports from an IBM Notes database. After populating the publication form with content and related assets, publishers typically had to wait 1–24 hours for the report to show up on Bluemine, depending on when they submitted the report.
161_IBMBluemine_24_newpublication_old.png

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Training

Bluemine offers training for internal content creators in three different ways:

- **Annual conference:** Bluemine publishers have an opportunity to attend an annual internal conference, free of charge, where topics such as Gestalt theory, writing, and communication skills are offered as workshop electives. During these sessions, instructors contextualize ways to generate content for different user segments. Sessions from recent years covered voice and tone, storytelling and flow, and how to write effective titles.
- **Apex:** In 2016, the Bluemine design team created and published MD&I's first design system, Apex, which is built on IBM's Design Language. Apex is housed in an internal-facing site that documents communication guidelines for voice and tone, data visualization, and use of images or stock photography. All Bluemine publishers have access to the Apex site and are not only encouraged to use it, but to contribute to it as well.
- **Workshops and "pro tips":** Workshops and written "pro tips" are provided throughout the year by the Bluemine marketing team through webinars and one-on-one meetings. The marketing team's relationship with publishers allows it to provide personalized recommendations to different teams and individuals who contribute content to Bluemine.

Content Management

The Bluemine team takes a multipronged approach to content management, applying a range of tools to the many challenges associated with keeping content in the best shape possible to maximize its value:

- **Accuracy:** Content creators are responsible for ensuring content accuracy. If readers find errors or have feedback, they can email the Bluemine support team, which then contacts the publishers or owners and works with them to address the issues.
- **Appropriateness:** All IBM publishers must adhere to IBM's corporate Business Conduct Guidelines when it comes to communications; the Bluemine team also uses these guidelines to judge content appropriateness.
- **Balancing new and old:** For market research purposes, many users wanted to retrieve older content and data for comparative and longitudinal studies. Given this, the Bluemine product management and development teams deliberately decided to keep older content accessible. When ranking results, however, the platform's search algorithm factors in recency so that older content won't clutter the SERPs. When users are looking for older content, they can sort results by date and apply custom date filters.

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Given Bluemine's current server and storage infrastructure, the cost of keeping published content without archiving is relatively low. Keeping dated content accessible has not created any performance issues that might affect the search experience.

- **Editing:** Publishers can edit previously published reports using the publishing tool. They can rewrite content, add or delete co-authors, and change relevant document tags. To let users know when content has changed, Bluemine displays both the original published date and the date of the last update for each report.

  The marketing team lead also acts as the editor-in-chief for Bluemine content. This is not a typical marketing responsibility, but the Bluemine marketing team oversees several aspects of user advocacy and education for IBMers. This marketing team not only works with publishers to create editorial content, but it also works with teams and individuals to ensure that promoted content both aligns with Bluemine's mission and meets user needs.

Maintaining Content Quality

Given Bluemine's nature and purpose—to find market data, follow trends and insights, and engage with IBMers to help win in the marketplace—the Bluemine team does not have concerns about content overlap. In fact, having different publishers contribute their unique perspectives and analyses on common topics adds to Bluemine's strength. Users expect to read a wide range of opinions, interpretations, and suggested next steps.

In a few rare situations, certain types of data are sanctioned across IBM as the "single version of the truth." One example is the official market segment definition and its associated end-user spending data for the segments that IBM uses for budgeting and planning. In these cases, Bluemine labels the content with clear and consistent descriptors so that users understand that they are consuming the company-sanctioned view of the topic.

CONTENT GUIDELINES EXAMPLE

Following is an excerpt from the *Bluemine Communications Guidelines*:

> We use our writing style to captivate our audience. Share knowledge with enthusiasm and—most importantly—clarity. Bring simplicity to the complex by making the best use of language.
>
> **Use an active voice.**
>
> We inspire action with an active voice. We create apathy with a passive voice. Be bold in language and state your sentence with a subject and an action, in that order. For example:
>
> - **Passive:** The cloud market share of IBM was greatly improved by the addition of new offerings.
> - **Active:** New offerings greatly improved IBM's cloud market share.

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Say it plainly.

We're all smart. We don't need to impress clients with a mastery of beautifully worded, yet long-winded sentences. Be clear, concise, and compelling.

- **Be conversational.** Write the way you tell a story, not the way you write a contract.
- **Avoid jargon.** Don't clutter language with buzzwords and industry terminology.
- **Avoid run-ons.** If you can't read a sentence out loud without taking a breath, or if it runs longer than two lines of text, it's too long.
- **Be concise.** Captivate your audience with brevity:
  - Use "to," not "in order to"
  - Use "we recommend," not "it is our recommendation"
  - Use "result," not "end result"

Culling Content

The team performed a content audit and found that legacy Bluemine housed 668 pages, 126 tools, and 1,800+ internal active reports. In addition to internal content, the application also linked to more than 88,000 external reports provided through vendor relationships. After analyzing Bluemine's content inventory, the team learned that more than 30% of the 668 landing pages had not been updated in two years. For each page, the team populated metadata such as content owners, number of unique visitors, total view count, and linked pages, just to name a few. These pieces of hard data guided the team in flagging content and asking deeper questions.

One major concern the team had was that legacy Bluemine's design weaknesses might bias existing metrics, leading to valuable content being unintentionally killed off. Flagging content, identifying content owners, and understanding how and why content existed in the legacy ecosystem became key steps in the culling process.

The Bluemine team engaged with approximately 50 primary content owners who oversee different parts of the intranet application. These conversations were typically difficult; no one wanted to lose their landing pages, see their reports archived, or be told that their content wasn't relevant to Bluemine anymore. The content strategist and leadership team members therefore carefully managed these relationships.

Ultimately, any content that was not migrated to the new platform was archived in databases. The Bluemine support teams and super administrators work with publishers and content owners to retrieve old reports and review new ones as needed.

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TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• IBM Cloud • Red Hat Enterprise Linux (RHEL) • IBM HTTPS Server (IHS)
Bug Tracking / Quality Assurance	• Zenhub/Github • Selenium
Design Tools	• Mural • InVision • Sketch • Adobe Illustrator • Zenhub/Github • SurveyGizmo
Site Building Tools	• Eclipse • Spring tool suite (STS) • Visual Studio Code • Webstorm • Atom • Postman
Content Management Tools	• IBM Proprietary
Search	• Elastic Search
Other Functions	• Datastage (ETL) • DB2 (database) • COS (object storage) • Jenkins (build and deploy) • Kafka (message system) • Watson Automation Manager—Silverpop (marketing automation) • IBM TeaLeaf CX (behavioral analytics) • IBM Cognos, Tableau, Dundas (data visualization)

Replacing Obsolete Technology

The legacy Bluemine, which was hosted using on-premise servers, used Lotus Domino technology for the majority of its functionality. Although the legacy application served users' needs, the team encountered several challenges.

Platform and back-end challenges:

- There was a growing gulf between product offerings and expectations.
- The hosting solution was expensive and required a long lead time to address new service requests.
- Small code changes required a separate release, incurring additional lead time.
- Integration with third-party and internal applications was time-consuming.

How technology impacted the UX:

- The interface and functionality deteriorated on modern browsers.
- The search functionality was inflexible.
- Much of the content served was out-of-date and hence no longer relevant.
- The summary generated in search results was not sufficient for users to determine a report's usefulness.

The technology behind legacy Bluemine also impacted several redesign goals, including to add new features, re-skin the dated look, and patch the navigation issues. So, the team knew that the project scope had to include replacing the back-end technology; if it wasn't replaced, parts of the intranet application would continue to thwart users' ability to find answers to their market questions. The key factors that determined how much of the back-end technology to replace—and how—were time, budget, and resources.

Technology Evaluation

IBM Bluemine team began the project with the following guidelines in mind to drive its technology and architecture choices:

- Favor modern and state-of-the-art technologies to fully realize the potential benefit from technical investment and to ensure that the supporting technology remains relevant for the foreseeable future.
- Build reliable, maintainable, and scalable environments to maximize performance and minimize downtime for users, developers, and the quality assurance team.
- Implement a continuous delivery ("DevOps") environment to enable the team to deploy releases as frequently as needed without undue risk to application stability and performance.

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- Adopt an Agile design, development, and deployment methodology where frequent iteration, prototyping, and releases are leveraged to refine and grow the application in an expedient and disciplined manner.
- Favor cloud-native development and deployment strategies for robust, cost-effective, and scalable application hosting.
- Utilize a responsive web design and development approach to support the largest number of user devices possible (knowing complementary mobile applications would likely not be available immediately after the initial rollout).

With these guidelines in mind, the team evaluated technology trends in enterprise development to determine which options and approaches to explore further. In addition to performing extensive research on popular enterprise development technologies and trends, the team spoke with internal IBM experts to understand which resources and hosting options were available and which might best serve the project's needs. The design team analyzed requirements based on end-user research and a detailed study of the legacy application data and usage patterns. It also utilized input from the design and technical teams to envision what an optimal web application might look like today and how such an application might evolve going forward. This vision informed many important architecture choices, with the goal of positively impacting the users, designers, technical teams, and executive leaders who use the application.

MOBILE

Responsive, But Not Mobile-First

Because Bluemine was designed to be fully responsive, IBMers can access Bluemine content on IBM-configured mobile devices without downloading a separate application. All desktop features and capabilities are available on mobile. Depending on the screen size, the interface layout and interactions might change, but the content remains the same.

When approaching the interface redesign, the team knew that the new solution had to be fully responsive, but that didn't necessarily mean mobile-first. After all, less than 1% of all Bluemine sessions are performed on a mobile device. Taking a fully responsive approach meant that the team could continue to let content drive layout, with a focus on key content pieces sought by IBMers.

This approach was key as the legacy Bluemine's design was fixed-width and tried to keep as much of the content "above the fold" as possible. As a result, it as accompanied by a separate native app for mobile users that included only Bluemine's search functionality. Thus, mobile users were unable to access proprietary tools, dashboards, and landing pages. They were also unable to download any internal reports or access external analyst reports from a mobile device.

Using a responsive approach for the new design also meant that there was no need to allocate resources to maintain two separate experiences; the team could therefore focus on making sure the content displays well across screen sizes in a single experience.

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SEARCH

Search Technology

The Bluemine team adapted Elastic Search to build its proprietary search algorithm. Market information has a temporal element to it, so making sure recent reports, points-of-views, and news appear at the top of search results is important. Through research and testing, the team found that IBMers generally look for well-known, credible IT analyst reports from sources such as IDC, Gartner, and Forrester; the search algorithm thus tends to weigh popular IT analyst reports higher than other sources.

Refining Search Results

Search filtering went through several iterations. In the final design, several search filters help users surface content that is most relevant to them, including the following:

- **Locked reports.** One filter has the ability to show/hide *locked reports*, which are third-party vendor reports that require a purchase to access (that is, they are not free through Bluemine). In legacy Bluemine, users said that many locked reports were the most relevant reports and that these "answers"—that they couldn't access—took up top real estate. Because some departments have the budget to purchase these reports, the team decided to add a locked report filter so users who don't want those reports cluttering up their search results can hide them.
- **Internal vs. external content.** Other filters include the ability to select internal or external sources so that users can compare internal IBM perspectives on market topics versus external perspectives.
- **Geography.** A filter for geography lets IBMers search for localized market information. For example, users assigned to the Asia Pacific region may not want to view results from Europe and Latin America.

Search Relevancy

Search relevancy is an area that the team continues to improve. Although the relevancy has come a long way, there's still a mountain to climb ahead. Methods that have been used to track search accuracy include:

- **Metrics.** The analytics team analyzes incoming search terms, attempts, and result clicks each month, and then shares its findings with the design and development teams.
- **In-app feedback.** At the bottom of each SERP, users can provide feedback on the usefulness of results. They can also provide additional information in an open text field.

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- **Feedback channels:** Bluemine leverages feedback channels such as Slack and an email inbox. Sometimes users can't find what they are looking for, so they contact the team for help to locate documents, reports, etc. Support teams share this feedback with product management teams, as well as with the design and development teams when relevant.

ROI

The Bluemine redesign's success can be illustrated through gains across a wide variety of both quantitative and qualitative metrics:

Quantifiable Metrics

- **Revenue:** Bluemine serves approximately 125,000 IBMers annually. Despite a few stumbles since the launch—and a few curve balls, such as the General Data Protection Regulation (GDPR)—the intranet surpassed revenue projections in the first few months of 2018. In April alone, the team beat revenue forecasts by 15%. Comparing January–April 2018 revenue to the same period in 2017, Bluemine has a lead of approximately $1.8 million on 2017.
- **Time savings:** In legacy Bluemine, publishers spent 30–90 minutes filling out the complicated publication form, while the new form takes as little as 5–15 minutes. This time savings allows people to move on to other daily tasks more quickly.
- **Repeat visitors:** The team defines a *repeat visitor* as someone who visited Bluemine two or more separate days during the year. In 2016, 40,107 IBMers visited Bluemine two or more times between January and May. In 2017 it was 37,060, and in 2018 the number of repeat users rose to 42,108.

  On average, 38,500 IBMers used the legacy Bluemine site multiple times in the first five months of 2016 and 2017. In the first five months since the MVP launched, the team saw Bluemine adoption increase nearly 10%, and it had already garnered 42,108 repeat users, through May 2018.
- **Net Promoter Score (NPS):** As a part of IBM's larger intranet ecosystem, Bluemine is an internal application that many IBMers depend on to do their day-to-day work. While acknowledging that NPS may not be the best success metrics for an internally developed application, the team surveyed Bluemine users before and after the redesign.

  Prior to the redesign launch, NPS for legacy Bluemine sat at -1 in November 2017. In May 2018, NPS for the redesign was +14.

Softer Measures

The Bluemine team has several channels for garnering soft metrics and feedback, including an omnipresent *Feedback* button on the Bluemine site, a public Slack

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channel called #bluemine_feedback, and a semiannual survey released to thousands of IBMers. The results of those measurement efforts include:

- **Feedback button:** Bluemine's Usabilla *Feedback* button lets users quickly rate the site and provide feedback, which Usabilla sends in real-time to the support teams. The team observed that spurts of negative feedback tend to be submitted shortly after new releases deploy. This channel helps the team quickly identify issues and bugs that arise from deployments. The team also uses the qualitative feedback to investigate user concerns and questions. The team also observed that most feedback from this channel is submitted by mobile users. Although mobile usage is low, the information gathered through the feedback button has helped the team improve the design and QA process for mobile usage contexts.
- **Slack channel:** The team monitors a public Slack channel in which users can post feedback and questions about Bluemine. Although the majority of posts are requests for features and enhancements, IBMers sometimes share things they love about Bluemine, too. While difficult to quantify, when users share feedback publicly in Slack and the post is met with a slew of emojis or threaded discussions, the team can get a feel for how certain users perceive parts of Bluemine.

  IBM Employee Workplace Effectiveness survey: Bluemine participates in a semiannual IBM Employee Workplace Effectiveness survey in which a randomized sample of IBMers (approximately 5,000 per survey) is polled. This survey helps the Bluemine team understand the product's NPS and gives it access to verbatim responses to key questions. Example survey questions include:

  - *For those that answered "No, I have not used Bluemine": Why haven't you used Bluemine?*
  - *For those that answered "Yes, I have used Bluemine": What do you use Bluemine for?*
  - *For all respondents: What changes would make you more likely to recommend it?*

  The Bluemine team partners with advisors in Market Research to use text analytics to uncover key themes from the semiannual survey. The themes are also shared with the design and marketing teams, which can use the information to formulate hypotheses for other research endeavors.

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LESSONS LEARNED & BEST PRACTICES

Lessons Learned

- **Test microcopy.** Within the first month of MVP launch, the team realized that there was some confusion about how to access different types of content (e.g., free versus paid content) on Bluemine. While it spent considerable time testing grey-scale wireframes, the microcopy was always the last step to be completed. The team learned, however, that microcopy is just as important as the design, and it can help make or break the UX. Had microcopy been given the attention it deserved during testing, user confusion may have been minimal.
- **Test search at scale.** The designs and implementation of the new search capability was in place well before MVP launch. Further, it had been tested with a handful of IBMers. However, because the testing was in a controlled environment, there was little way to gauge relevancy for all the different queries and inputs across market topics. Shortly after MVP launch, the team received complaints that search wasn't meeting expectations across the board. In hindsight, the team realized that designing an in-app feedback loop—in which users could beta tested the search before the initial launch using the app—would have allowed the team to gather data at scale.

Best Practices

In addition to learning valuable lessons from things that didn't go exactly as planned, the team also found success with great ideas that proved to be critical to the success of the new Bluemine:

- **Develop a brand architecture.** To help keep content aligned to Bluemine's IA, the team developed a model for brand architecture that laid out definitions and categories for the different types of content and initiatives that might live on the site. One of the issues with legacy Bluemine was the overwhelming number of tools, dashboards, and programs offered: the directory contained a whopping 126 offerings. In addition, there were hundreds of landing pages for numerous programs and IBM initiatives. Users stated that many of the offerings overlapped in capabilities and the sheer number of tools available was overwhelming. To support the redesign, not only did the team reduce the number of offerings to 30 and the key programs down to five distinct IBM initiatives, it also created a brand architecture that would guide and maintain the tidiness of the Bluemine portfolio.

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- **Take a content-first approach.** There are a growing number of ways to consume content beyond interfacing with a screen. Thus, rather than focus on mobile-first, which puts devices at the forefront, the team focused on being content-first. Because IBM has begun exploring new ways to interact with content (e.g., voice interfaces and chatbots) across different channels and mediums, the team has begun thinking beyond the screen as well. Its key conversations revolve around which pieces of content users look for and how they might obtain it in different contexts. Applying this strategy from the beginning of the project affected the entire design process, from the way the team tackled the content inventory to how it built user research protocols and created interface wireframes. The design team moved away from drawing empty boxes filled with *Lorem Ipsum* to thinking about how specific, existing content might be laid out differently.
- **Content audits are worth the time.** A content audit was essential to review, prune, and refine content. Although it took several weeks for the team's content strategist and content owners to go through legacy Bluemine, the time spent was worth it to avoid accidentally killing off valuable information.

  Because content audits can be very manual and tedious—especially given the qualitative aspects of interviewing publishers and content owners—it's important to tackle it early in the redesign process. If the team was not content-driven and had instead focused only on replacing Bluemine's backing technology and front-end interface, the overall redesign could have risked feeling like a re-skin to users.

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Lamprell Energy Limited

OVERVIEW

COMPANY

Lamprell is a leading provider of fabrication, engineering, and contracting services to the offshore and onshore oil & gas and renewable energy industries.

Headquarters: Dubai, United Arab Emirates

Company locations: Lamprell has offices in Jebel Ali, Dubai Investment Park, Sharjah, Hamriyah, and Iraq.

Locations where people use the intranet: Administrative staff members at all Lamprell locations use the intranet.

Annual revenue: Approximately $370 million USD in 2017

THE INTRANET

Users: Approximately 1,300 users use the intranet to access various HR-related information. This includes line managers and approvers who are required to approve various requests made through the intranet and users across the organization who come to the intranet to find company memos and announcements.

Mobile approach: Responsive web design

Technology platform: Asp.net, HTML5, JQuery

TEAM

Leadership: Sohail Iqbal, Web Development.

Design (Creative Services): Muhammed Asgher, Technical Consultant.

Development: Sathish Kumar, Technical Consultant; Jenu Varghese, Senior Web Apps Administrator; Manju Sunil, Technical Consultant.

Human resources: Shallet Bhujbal, HR Operations Manager; Sapna Nayak, Compensation & Benefits Manager.

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INTRANET TEAM



Team members shown here (left to right): Jenu Varghese, Sohail Iqbal, Shumon Zaman, Syed Tasaduq, Mohammad Asgher, Sathish Kumar.

HIGHLIGHTS ABOUT THIS WINNER

Transparency and visibility are two great themes for the Lamprell's LamprellConnect intranet. While taking advantage of a core competency and gathering statistics, LamprellConnect offers constant data availability, which means that teams can analyze and reproduce their processes in successful situations or see issues and raise flags well before any condition has gone too far.

- **Omnichannel:** A system of ID cards and software make it possible to track, analyze, and communicate the inner daily workings of Lamprell's 5,000 employees.
- **One UI platform to consolidate information in many applications:** LamprellConnect brings together volumes of data and the most frequently used modules from many different applications. Linking the applications with back-end systems means employees see real-time data on the intranet and can always get more details by clicking links to the full applications. With this, employees can do most of their work on this one platform and act on it, which eliminates the need to switch between various applications.

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- **KPIs on home:** Each employee sees three KPIs on the homepage. These KPIs relate to the employee, the employee's function, and the entire company. This visibility allows employees to see how their own KPIs align with those of their department and the company, and if they are progressing well enough to meet them. This transparency and clear goal setting helps employees take control of their work, and guides them to know when they need to make adjustments.
- **Statistics dashboards:** Lamprell is vigilant about measuring its work and is just as vigilant about sharing the data to keep employees aware and efficient. Several statistics—related to safety, finance, people, supply chain, and other KPIs—are posted in plain sight on dashboards so that employees can learn from them, do research, and act. These data are not just informational, but also motivational for employees.
- **Safety:** Maintenance of a world-class safety standard is a core value at Lamprell. The related statistics help employees monitor their achievements and strive to do better when needed. Thorough charts are easy to access and are displayed to employees based on role.
- **Manager's homepage:** The manager's homepage makes it possible for managers to perform most of their day-to-day activities in just a few clicks. This efficient dashboard lets them take immediate action rather than having to locate, log in to, and work in multiple applications. This homepage helps managers stay on top of their daily tasks and keep their team moving forward.
- **Personalized:** LamprellConnect presents content depending on the logged-in user's role, stripping away noise and targeting information that each user needs.
- **Team information and forum:** Team information keeps employees abreast of tasks, as well as when coworkers plan to be out of the office. The team forum feature gives employees a platform on which to share ideas, comment, and like topics.
- **Individual information:** Employees can access their own information about areas such as time off and ID card swipe errors. This information is readily accessible on LamprellConnect and stored all in one place.
- **Employee spirit:** Work anniversaries, birthdays, and new hire information are a few of the topics shared on LamprellConnect that make employees a connected team rather than just formal coworkers.
- **Search:** Policies and documents are stored in various applications at Lamprell. Still, employees can search, find, and access them easily via the intranet.
- **Responsive**: Employees can access the intranet from any device.

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BACKGROUND

The previous version of the Lamprell intranet was developed in 2010—and eight years is a lifetime in the world of IT. The old intranet was not living up to current standards; the company had developed different business applications for various departments and the old platform wasn't adequately supporting them. The main purpose of the intranet redesign was to make use of the latest browser features, as well as to bring together frequently used modules from different applications and have them operate from a single platform. The goal was to create an environment in which employees could use a single application for approvals, requests, and dashboard viewing. The design team took this goal and pushed it further, adding role-based personalization features.

Goals

The team faced many challenges, including those related to speed, security, and business requirements. The team had to ensure that each page displayed within 2–3 seconds, regardless of the content or integration. For pages that pulled info from various applications, it was a challenge to get them to display quickly.

The second challenge was to ensure high-quality security, as the intranet connects to all areas and domains across the business. The team used proper testing, user classification, and segregation efforts to ensure relevant access was provided. Finally, the team needed to create an intranet that would accommodate various permission levels.

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DESIGN REVIEW

Homepage

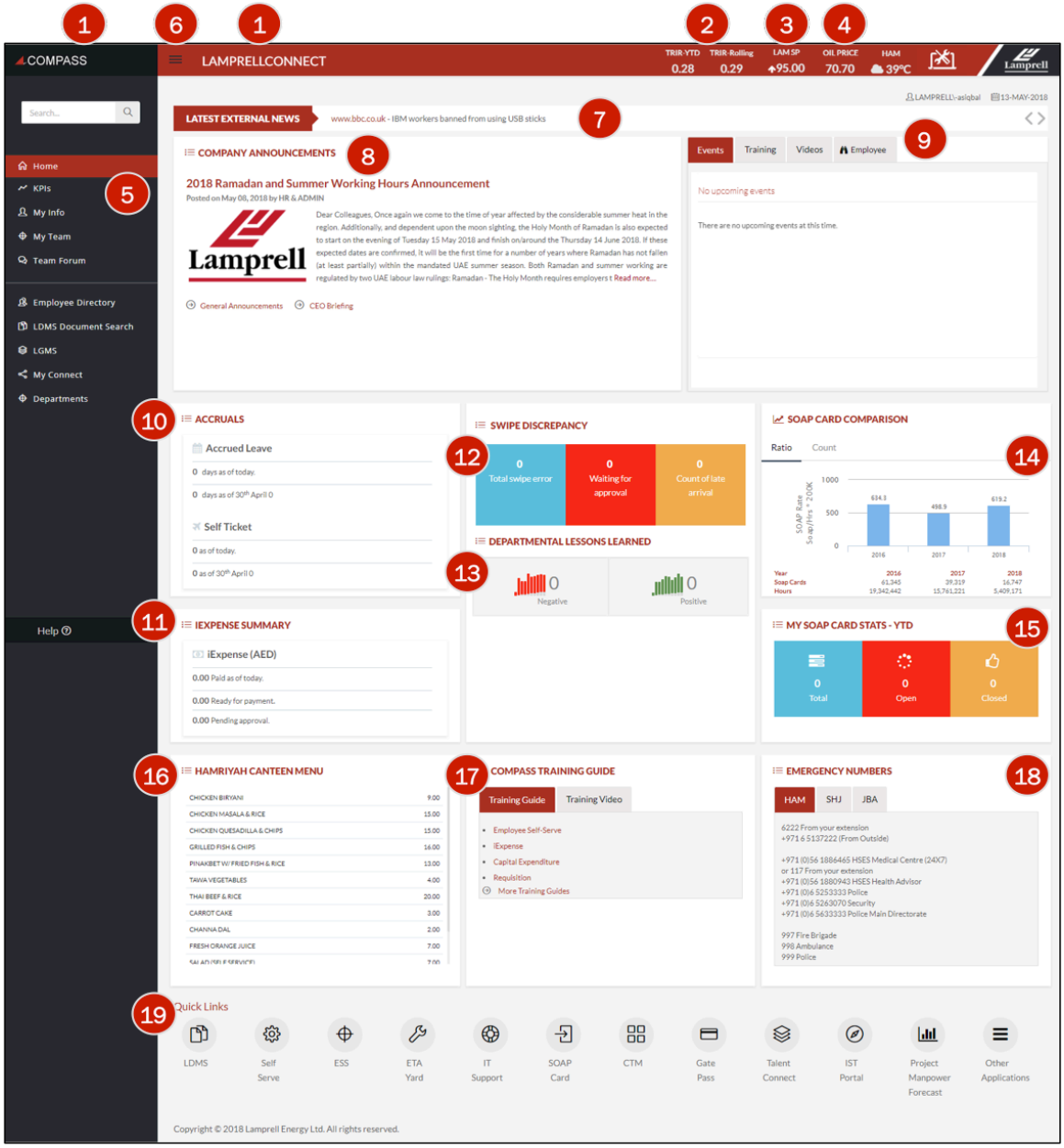


Image 162. Lamprell Intranet Homepage. LamprellConnect's homepage displays important statistics to help employees stay ahead of things.
162_Lamprell_01_home_live.png

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Homepage, Highlights

The LamprellConnect homepage puts several statistics at center stage to give employees an immediate snapshot of the state of affairs and items warranting close attention.

1. **Intranet name:** In the far upper left is the word *Compass*, which is Lamprell's enterprise resource planning team's brand name. The name of the intranet, *LamprellConnect*, also appears toward the upper left.
2. **Statistics:** A red bar spans the top of the page; on the right side of it, employees can review the Total Recordable Incident Rate (TRIR), which shows important statistics associated with OSHA requirements. It's helpful for employees to have these stats at their fingertips, and it reminds them of the importance of following safety procedures.
3. **Share and price:** Also in the upper right is Lamprell's stock share price, labeled *LAM SP*. The number indicates the current price, and the arrow to its left shows whether the price is up or down. Seeing the company's stock price and its direction can both motivate and excite employees.
4. **Oil price:** Core to the business, the latest price of oil is also clearly listed in the upper right.
5. **Navigation:** Links in the left-side navigation menu are shown based on the logged-in user. Removing unneeded links can eliminate clutter and confusion. The menu's visual treatment makes it easy to spot if you need it, but just as easy to ignore if you don't. A dark grey background makes the area look like a menu, and the white text is legible on the dark background. A splash of red signifies the menu's selected section. The team chose to separate the menu into two parts: 1) business-related items, which require security rights for the employee to view, and 2) personal and general items, which are available to all employees and do not require authentication.
6. **Collapse:** The three-line icon in the red bar at the top allows users to collapse the left-side navigation menu and display only the icons (shortcuts). This is a nice way to let employees use screen real estate effectively, depending on their current tasks.
7. **External news:** The first item in the homepage's content area is a link to a recent news headline, with the tile and its source. Employees can choose which news topics they would like to see, which keeps them in control and interested in logging in to LamprellConnect.
8. **Announcements:** The *Company Announcements* occupy a large piece of the homepage to ensure that employees are aware of vital information. A recent announcement displays with a large red title, the date it was posted, which department posted it, and a paragraph of text. The *Read more…* link leads to the full announcement. Likewise, the *General Announcement* link leads to a page with more announcements. To ensure that the CEO's message gets out to everyone, the *CEO Briefing* link appears in the same announcement area.

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9. **Events and training:** To the right of the *Announcements* area is a section that includes user-specific information in four tabs: *Events, Training, Videos,* and *Employee.* Items related to the logged-in employee appear in these tabs, giving employees quick and easy-to-access information about events and training important to their work.
10. **Leave accrual:** The *Accruals* section details how much time off the employee has accrued. This is a good way to help employees plan and manage their time away.
11. **Expenses:** An expense report summary section shows the user's expense reports and how much of those expenses are paid, ready for payment, or pending approval. This lets employees easily pan, track, and follow-up on expenses as needed.
12. **Swipes:** On the right side of the homepage are four different metrics that employees track. The first, *Swipes*, relates to checking in for work. All employees are issued swipe cards and are required to clock in and out. The intranet team's research revealed that swipe discrepancies were one of the most common reasons that employees contacted support. Typically, either the employee forgot to swipe the card, or the swipe did not work, and thus the time was incorrectly tracked. Employees must reconcile any inconsistencies by a specific deadline each month to ensure that they are paid the right amount. Adding the *Swipes* section on the homepage helps employees notice any swipe discrepancies quickly and is one way that the intranet team sought to help decrease support calls.
13. **Lessons learned:** Next, two small bar charts show statistics about positive and negative things the department has learned. This can be motivational for employees to share and to learn about to help improve department processes.
14. **Comparison statistics:** Employee safety is top of mind at Lamprell, and the company tracks safety events vigilantly. Part of understanding safety is ensuring that all employees take part in the safety observation. Every month, whenever a discrepancy is noticed anywhere in the organization, employees create Safety Observation Assessment Program (SOAP) Cards. These show statistics on how many issues are open, closed, and resolved.
15. **Status:** The status of SOAP Cards that employee raise appear in the *My SOAP Card Stats* section. This lets employees see how many of their own SOAP Cards are closed or remain open.
16. **Cafeteria menu:** It is always important for employees to know what's available for lunch. The *Hamriyah Canteen Menu* section in the lower left of the homepage lists the menu—from appetizers to desserts—and prices. With this, employees can plan their mid-day break.
17. **Intranet training:** To teach employees how to get the most from the intranet, the team created training documents and videos. The *Compass Training Guide* section at the bottom of the homepage offers links to helpful guides on how to complete top tasks—from creating an employee hiring requisition to purchasing equipment.

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18. **Emergency:** Knowing who to call in an emergency helps in high-risk situations, so the intranet offers pertinent phone numbers right on the homepage in the *Emergency Numbers* section.
19. **Links:** The designers understood how important it is for employees to access the most frequently used applications, so they chose to display icons with helpful labels linking to 11 applications at the bottom of each page. They chose the 11 apps after analyzing usage data. To ensure that employees can access more than just these 11 apps, the designers also included *Other Applications* as the last icon so users can see the full list.

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Homepage for Managers

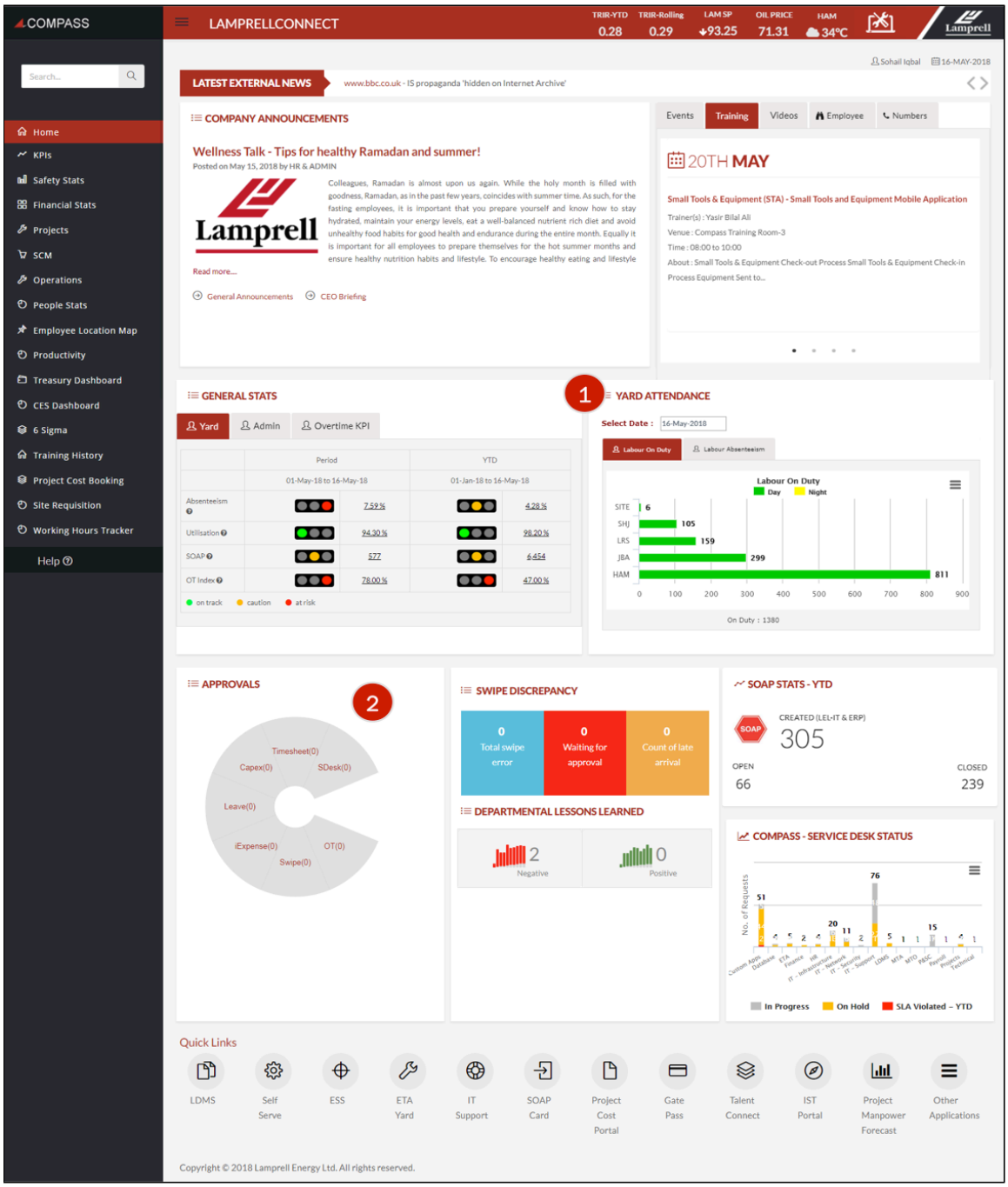


Image 163. Lamprell Intranet Managers' Homepage. The manager homepage on LamprellConnect acts as a dashboard of statistics about a manager's team. *163_Lamprell_02_home_live.png*

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Homepage for Managers, Highlights

Managers get a special version of the homepage, which they can use as a dashboard to stay abreast of general team statistics such as overtime and absenteeism.

1. **Statistics:** Two cards show information about the manager's team. The first, *General Stats,* summarizes information about topics such as *absenteeism* and *SOAP*, and notes the time period and percentage. Colored dots—red, yellow, and green—indicate issues and non-issues; this color code makes it fast and easy for managers to see where they need to put their efforts. The second card, *Yard Attendance,* displays a bar chart showing how many people worked on the selected day. Green bars indicate daytime work, while yellow bars indicate nighttime work. Managers can choose a date using the *Select Date* button at the top. This chart helps managers track their resources efficiently. They can also drill-down further on all of this information to eventually arrive at the transaction-level details.
2. **Approvals:** The *Approvals* chart shows managers their pending approvals. With this simple chart, managers can see what they need to review. When they click on an item, it shows a list where they can approve or reject the item. Rather than open and log in to individual applications, managers can use the dashboard and in a few seconds and a few clicks, they can keep Lamprell's wheels whirring efficiently.

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Key Performance Indicator Page (*KPI*)

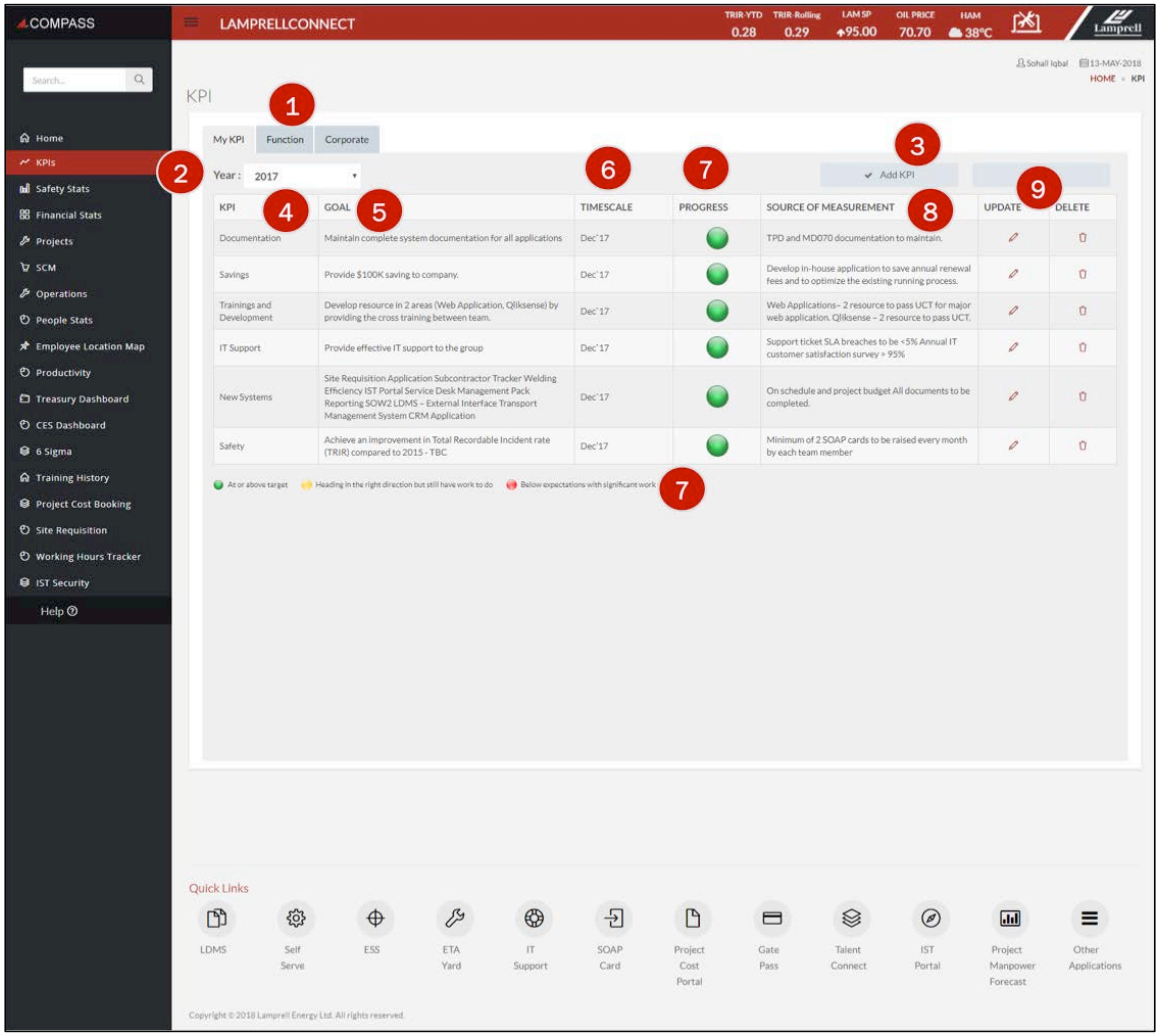


Image 164. Lamprell Intranet *KPI* Page. KPIs are defined, communicated, and tracked on the *KPI* page. *164_Lamprell_03_KPI_live.png*

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KPI, Highlights

KPIs are clearly defined, communicated, and measured for individuals, functions, and the entire company. Making employees aware of these, at all levels, helps them understand exactly what they are working toward and how they are doing. This KPI data is linked with the company's performance management application to ensure that the data is the same in all locations.

1. **Lens:** Selecting a tab at the top shows information for one of three areas. 1) *Individual:* the employee's own KPIs and progress on them. 2) *Function:* KPIs for the employee's department. 3) *Corporate:* targets set for the entire company.
2. **Year:** Users can select the year from a drop-down list to see the current goals, as well as look at past KPIs to compare and learn from history.
3. **Add:** Employees can easily create a new KPI with the *Add KPI* button.
4. **KPI:** The table's first column includes the KPI topic area.
5. **Goal:** The *Goal* column puts a flag in the ground, summarizing the targeted result. Having this detail, written and clear, is priceless for employees. It tells them exactly where to aim.
6. **Time:** The *Timescale* column gives an exact due date for the KPI.
7. **Progress:** The *Progress* column displays a colored indicator—green, yellow, or red—that immediately communicates the KPI's status and whether the work toward meeting it is on track or needs attention. A legend below the table describes each color marker.
8. **Measure:** The *Source of Measurement* column communicates how it will be decided whether the KPI is being met or not. This clarifies for all employees how their work is being tracked.
9. **Update or delete:** The table's last two columns offer icons—a pen and a trash can—that let employees update or delete the KPI.

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Safety Statistics

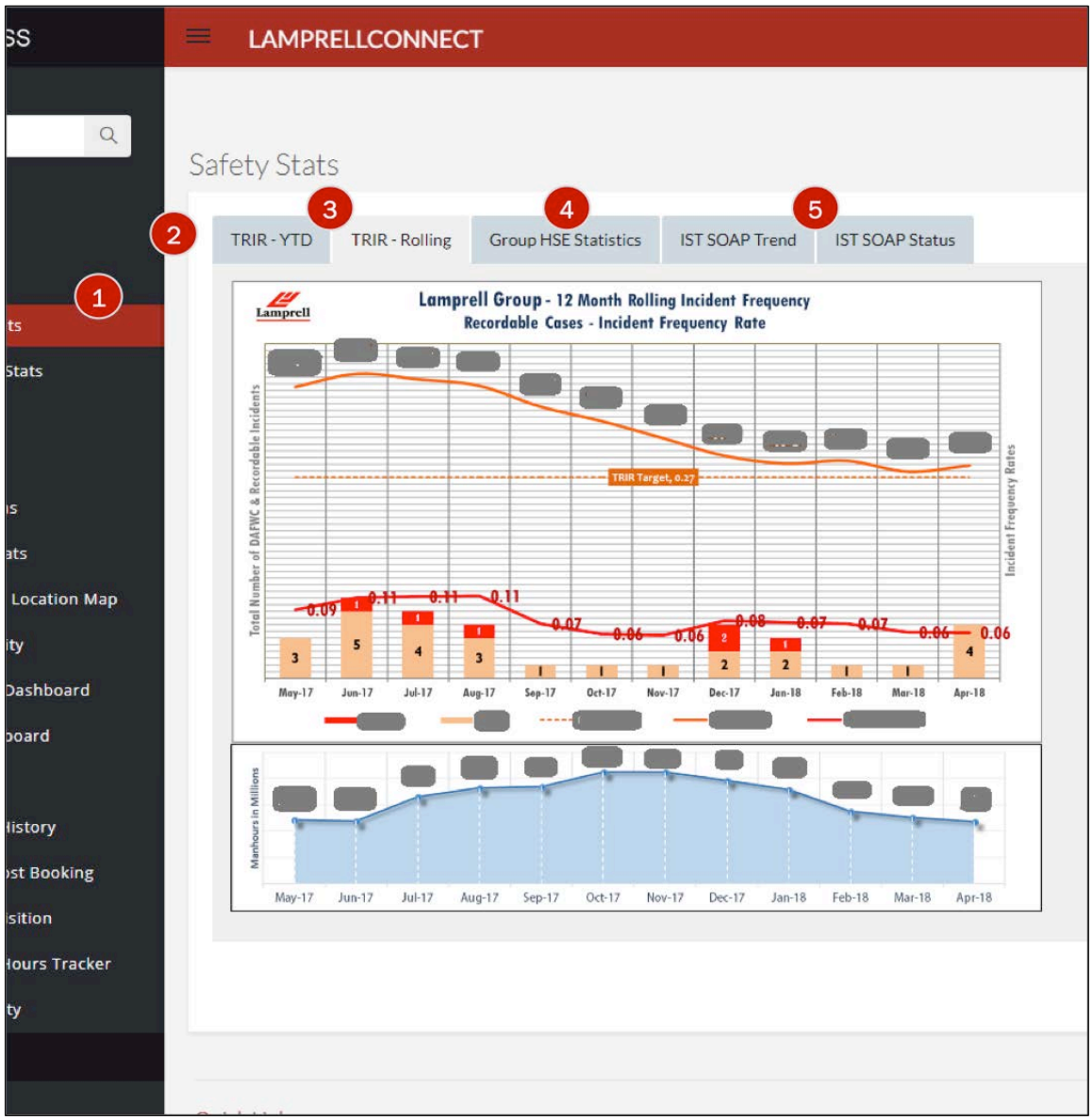


Image 165. Lamprell Intranet Safety Statistics. Thorough charts compile safety statistics that employees can use in their daily work.
165_Lamprell_04_Safety_live.png

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Safety Statistics, Highlights

Working with energy sources is as important as it is dangerous. At Lamprell, the safety of employees and customers is a grave concern. One way the company communicates this concern is through the safety statistics it collects and shares with employees.

1. **Page:** The *Safety Stats* page is the third item in the left-side navigation menu. This high position demonstrates the topic's importance.
2. **Tabs:** The tabs on the *Safety Stats* page include critical safety statistics. Each of the four tabs can be shown or hidden based on the logged-in user's role.
3. **Incident rates:** The first two tabs pertain to TRIR (Total Recordable Incident Rate). The *TRIR-YTD* tab shows the number of incidents related to the total person-hours worked against all projects. The *TRIR-Rolling* tab displays the incident frequency rates in a graph with month-on-month comparisons. The mixed chart type (using both lines and bars) makes it possible for employees to see cyclical trends, which can help them better understand their work and plan for the safest future.
4. **Table format:** The *Group HSES Statistics* tab (for Health, Safety, Environmental and Safety stats) shows the *TRIR-Rolling* tab's information in a tabular format. Showing the same data in multiple ways lets employees study the data in the format that works best for their current task.
5. **Statistics:** SOAP Cards are observations raised by individual employees whenever they notice a safety discrepancy. Every department has KPIs in place to encourage them to raise SOAP Cards every month for the safety department to monitor, analyze, and work on. Once open, SOAP Cards require safety department action; they are closed once they are resolved (by both the safety department and the SOAP Card owner). Both of these tabs show the departmental SOAP Card monthly trend and current status statistics.

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Financial Statistics

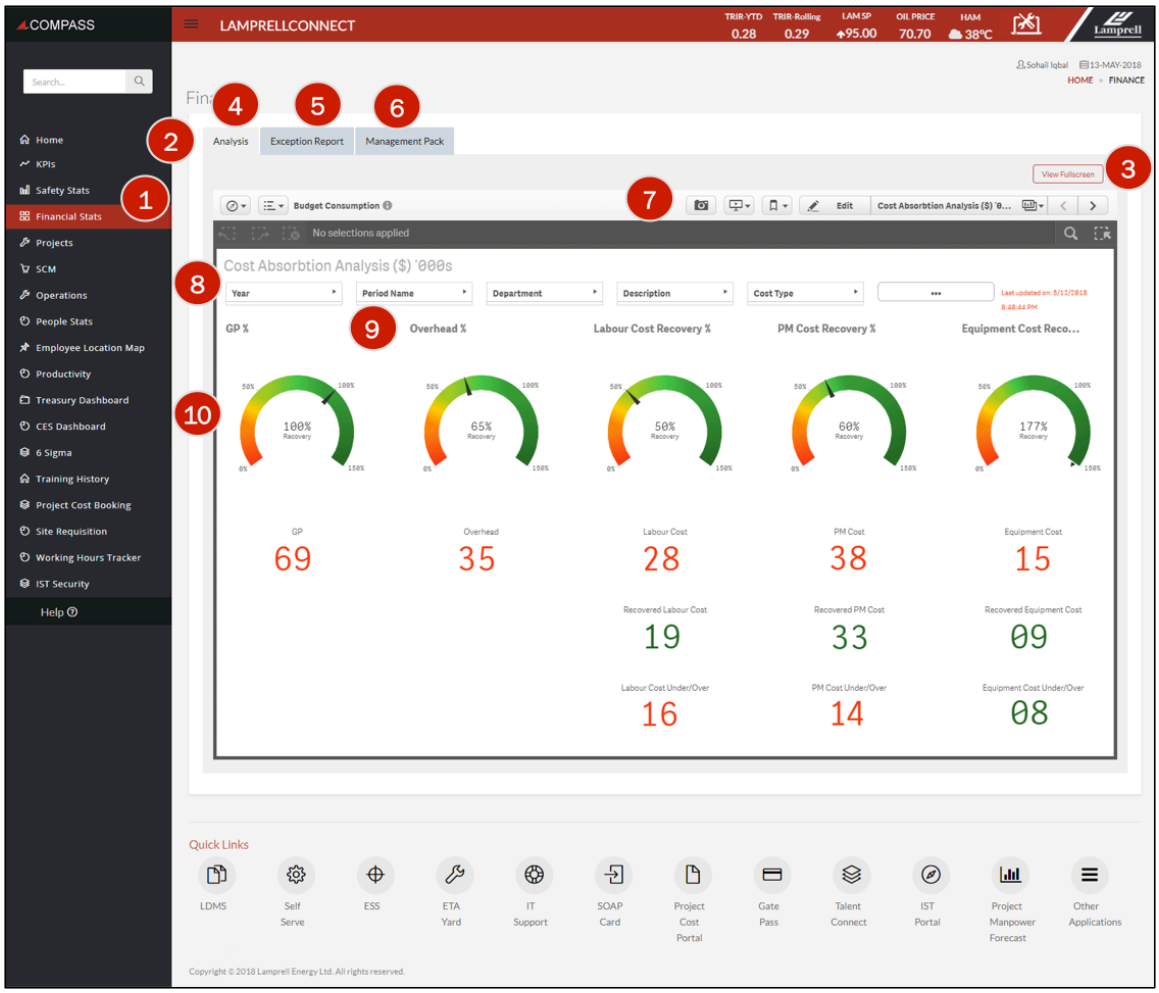


Image 166. Lamprell Intranet Financial Statistics. Sets of pages and charts in LamprellConnect's *Finance Stats* section consolidate financial data for employees. *166_Lamprell_05_FinancialStats_live.png*

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Financial Statistics, Highlights

Lamprell makes it its business to track and chart financial goals and their related statistics. LamprellConnect is linked to Oracle Financials to auto-generate the finance dashboard that displays the data to employees.

1. **Page:** The *Finance* page is accessible from the left-side navigation menu.
2. **Tabs:** The tabs on the *Finance* page include various financial statistics and charts. Each of the three tabs can be shown or hidden based on the logged-in user's role.
3. **Full screen:** Employees who want to dive deep into the data can view the dashboard full screen with the *View Fullscreen* button.
4. **Budget analysis:** The *Analysis* tab shows statistics about how much of their allocated budget a department or group has consumed. This priceless page helps employees monitor spending to stay within budget or raise a flag if unexpected costs are eating a substantial chunk of allocated money.
5. **Discrepancies:** The *Exception Report* tab shows the summary of any discrepancies in *Accounts Receivable*, *Accounts Payable*, *Employee Time Allocation*, and the *General Ledger*. Employees can click the links to access details and act on them.
6. **Company financials:** Senior managers can consult the *Management Pack* tab for the monthly financial status across the entire company. Having these numbers at their fingertips saves senior managers time, which is always at a premium.
7. **Actions:** Clicking icons above the content area lets users take various actions, such as taking a screenshot, editing, or moving to the next chart.
8. **Filters:** Drop-down lists at the top of the content area let employees filter chart data. Manipulating the numbers in various ways helps give employees a full, true picture of what's happening.
9. **Titles:** Each chart has a title, which helps ensure that employees understand exactly what the numbers they are looking at represent. The title is located just above to chart to avoid any confusion about which chart the title describes.
10. **Gauge charts:** Each chart shows a minimum and maximum value—in this case 0% and 150%, respectively. It's important that these values are the same in all dashboard charts as employees use them to compare values. As with a car's speedometer, the dial shows one value—indicated specifically by the percentage in the center of the gauge, and more crudely with the small black needle. Shading colors from red to green give additional subjective feedback about whether the value is positive, neutral, or negative. Absolute numbers related to each chart's percentages are labeled and appear below the chart.

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Not pictured: An *Invoice on Hold* tab shows any invoices on hold in a graphical format; it also provides information about the status and duration of pending invoices.

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Market News

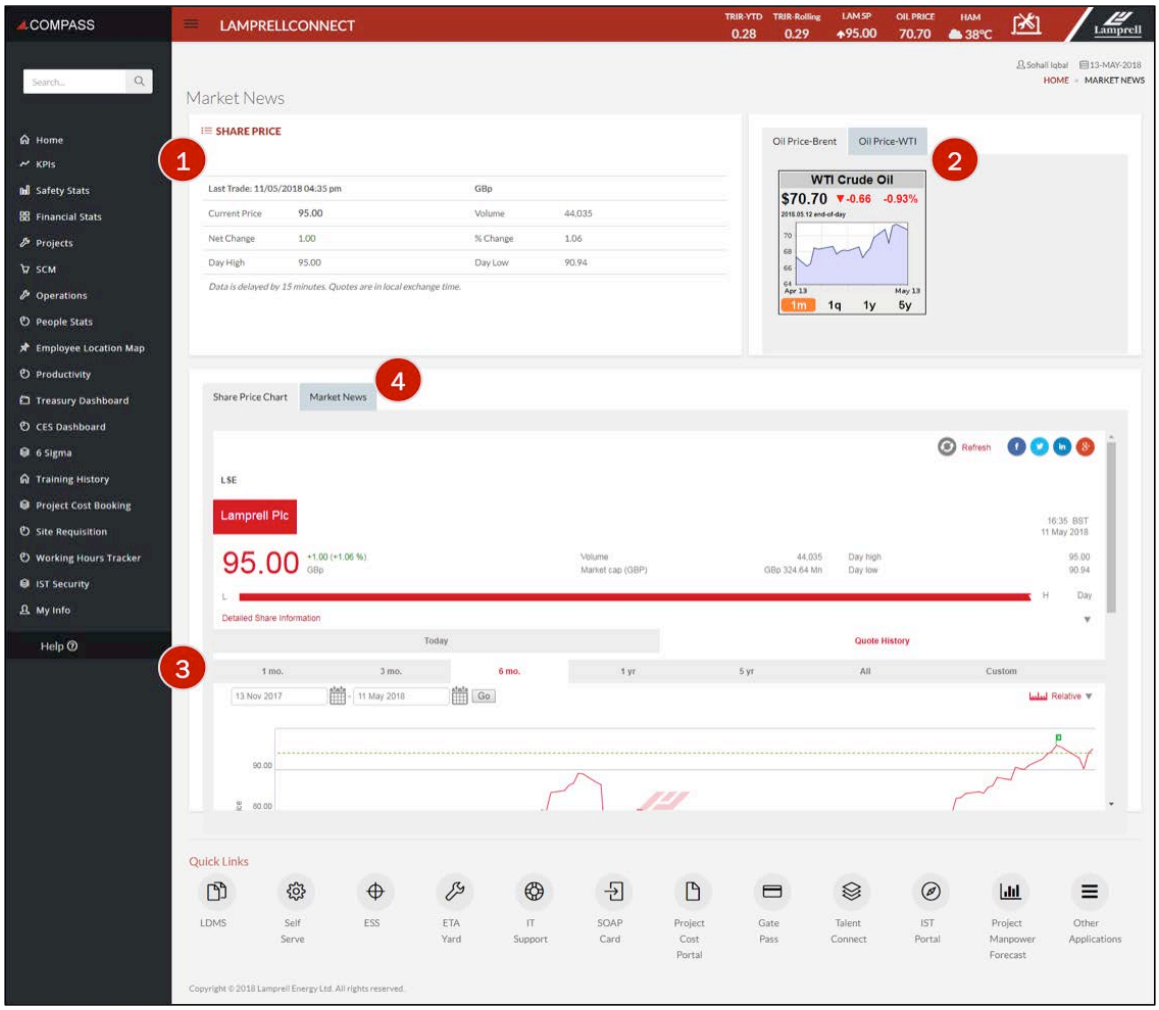


Image 167. Lamprell Intranet Market News. Employees can stay abreast of company stock performance, oil prices, and industry news in the *Market News* section. *167_Lamprell_06_MarketNews_Live.png*

Order NNG190115-7904-48466

Market News, Highlights

The *Market News* page offers thorough information about the company's stock and its industry.

1. **Share price:** The daily trading activity—such as last trade and trading volume—appear in the *Share Price* table at the top of the page. This gives employees the lowdown on the company's stock.
2. **Oil price:** The *Oil Price*-Brent and *Oil Price*-WTI tabs allow employees to view price charts for these two crude oil grades.
3. **Share price over time:** The *Share Price Chart* tab displays the share price within various time intervals. Tabs with different options—such as *one month* or *five years*—let users select the desired interval.
4. **News:** The *Market News* tab includes summaries of and links to the latest industry news articles. This is a user-friendly way for employees to keep up with news in their field.

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Supply Chain Management

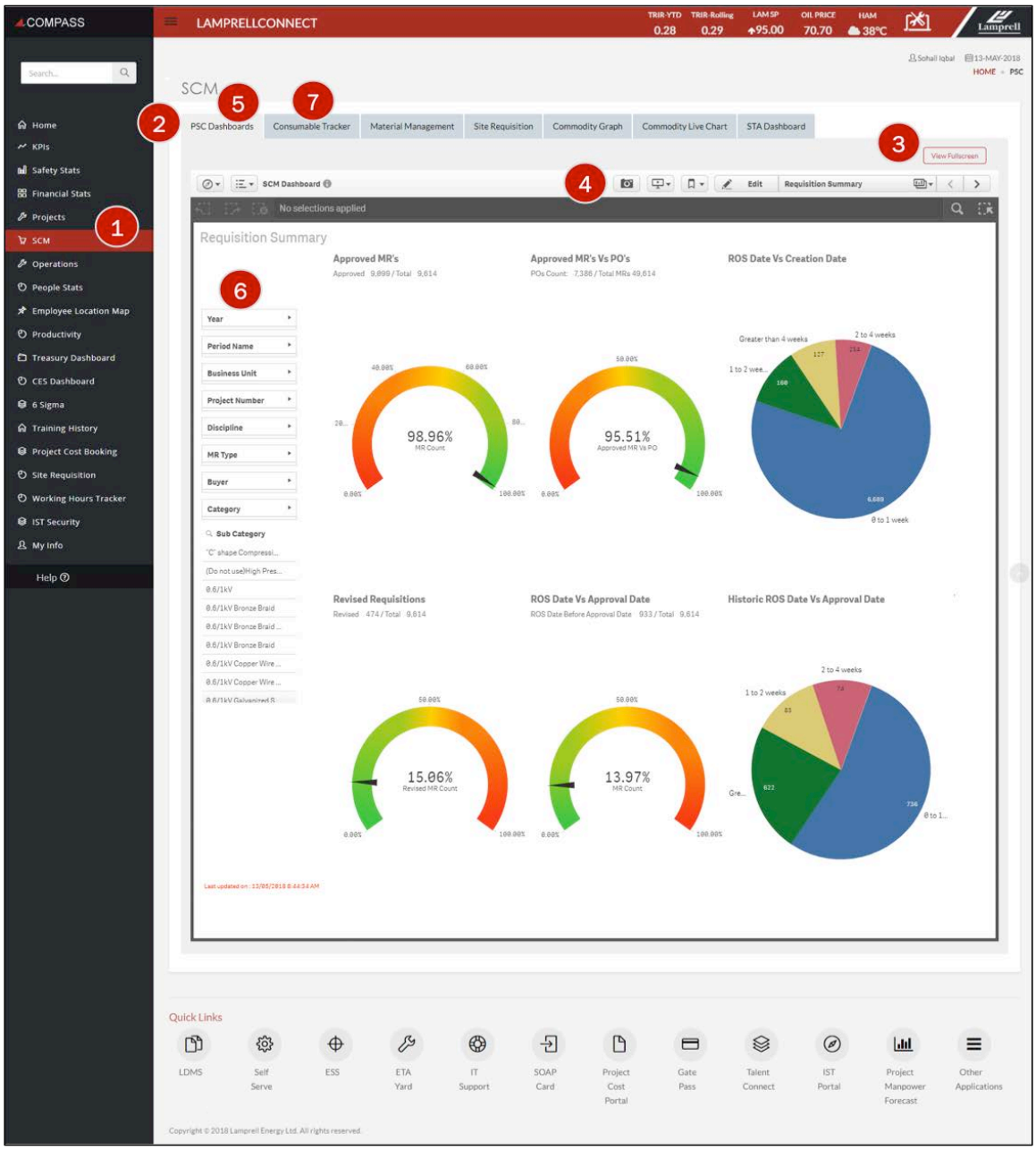


Image 168. Lamprell Intranet Supply Chain Management.
LamprellConnect houses extensive information about how resources are moved to customers in the *SCM* (Supply Chain Management) section.
168_Lamprell_07_SCM_live.png

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Supply Chain Management, Highlights

Moving any product to customers can be challenging, but when energy is your product, that process becomes even more complex. To keep the product flowing smoothly, LamprellConnect communicates real-time supply chain management information.

1. **Page:** The *SCM* page is accessible from the left-side navigation menu.
2. **Tabs:** *SCM* page tabs include various supply-chain statistics and charts. Each of the tabs can be shown or hidden based on the logged-in user's role. The dashboards are linked to the Oracle Procurement module to show real-time information in graphs. The system also maintains an access log with information about which users have accessed which screens and when.
3. **Full screen:** Employees who want to dive deep into the data can view the dashboard full screen with the *View Fullscreen* button.
4. **Actions:** Clicking the icons above the content area lets users take various actions, such as taking a screenshot, editing, or moving to the next chart.
5. **Order tracking:** The *PSC Dashboards* tab displays charts of statistics about material requisitions, purchase orders, and expediting orders. These options make it easy for employees to track when orders were created and approved, and their current status. This ensures that employees have the information they need to fulfill orders and communicate effectively with customers.
6. **Filters:** Several filters on the left—such as *Year, Business Unit,* and *Buyer*—let employees see the data in the most revealing ways given their current task.
7. **Inventory utilization:** The *Consumable Tracker* tab provides information on utilization by project, utilization by employee, and inventory (on-hand aging) dashboards.

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Productivity Dashboard

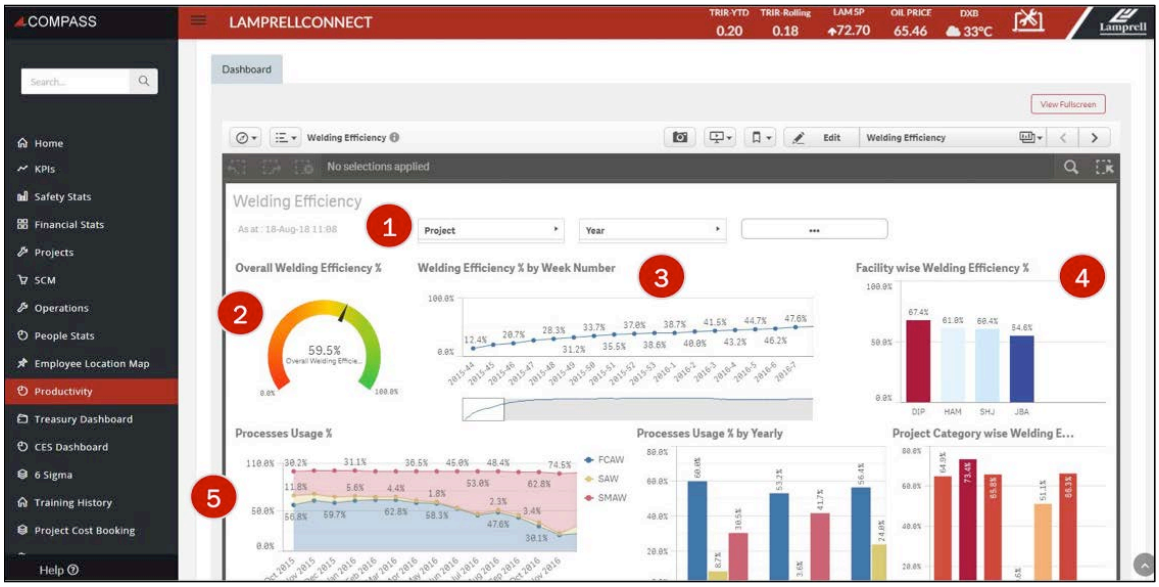


Image 169. Lamprell Intranet Productivity Dashboard. Productivity dashboards make it possible for managers to see how efficiently tasks are being completed. *169_Lamprell_08_WeldingEfficiency_live.png*

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Productivity Dashboard, Highlights

Various charts show production-to-waste ratios for different tasks, so managers and employees can see how efficiently they are working. The *Welding Efficiency* dashboard is an example of a dashboard in the intranet's *Productivity* section.

1. **Filters:** Employees can filter welding efficiency statistics by project or year, making it easy to compare efficiencies.
2. **Overall:** The *Overall Welding Efficiency* chart shows an exact number in the center of the gauge.
3. **Weekly:** The *Welding Efficiency % by Week Number* shows a line chart with circle markers and labels for each week. The year and week number are listed across the *x*-axis, while the percentage scale is on the *y*-axis. As this powerful and telling chart clearly shows, efficiency has been steadily improving each week.
4. **Location:** The *Facility-wise Welding Efficiency %* displays the facility names across the *x*-axis and the percentages along the *y-axis*. Each bar in the chart represents a facility, appears in a different color, and displays a label of the exact percentage just above it.
5. **Charts:** Additional bar and area charts display process usage by month and year, and welding efficiency by project. Employees can get a grip on their welding efficiency by consulting these informative charts.

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People Statistics

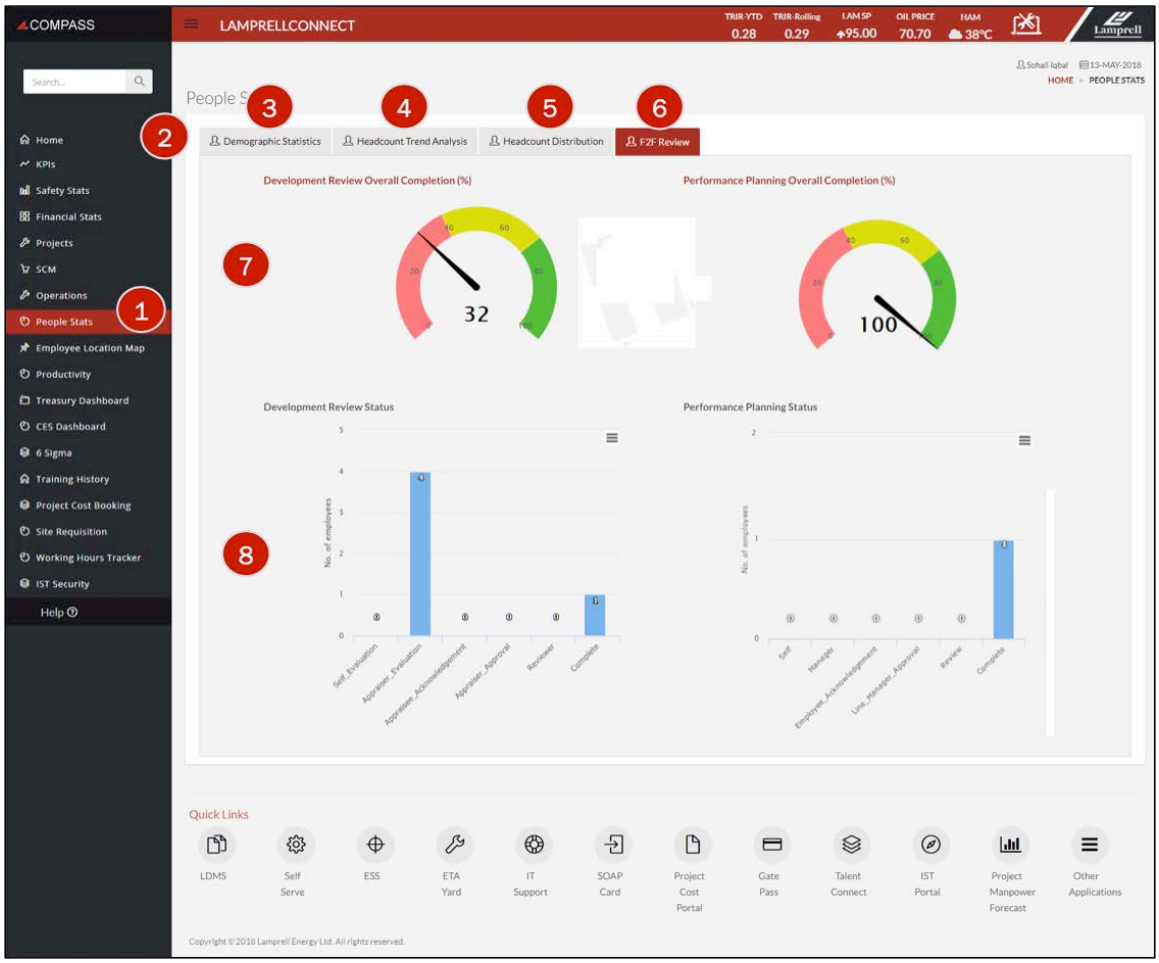


Image 170. Lamprell Intranet People Statistics. The *People Stats* dashboard gives information about the Lamprell workforce makeup. *170_Lamprell_09_HR_live.png*

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People Statistics, Highlights

In addition to KPI tracking, Lamprell tracks its human resources. The *People Stats* interactive dashboard displays workforce information. Linked to the Oracle HR system, it offers a dynamic access (personalization) mechanism that allows administrators to define which employees see which sections of the workforce.

1. **Page:** The *People Stats* page is accessible from the left-side navigation menu.
2. **Tabs:** The tabs on the *People Stats* page include charts with information about employees such as: headcount across years, demographics, teams, and performance. Each chart can be shown or hidden based on the logged-in user's role. Each chart is interactive and allows employees to drill-down to the individual employee level.
3. **Demographics:** The *Demographic Statistics* tab shows graphs with real-time headcount statistics about criteria such as age, length of service, nationality, and gender. This information enables the HR department and mangers to see their workforce diversity and attune as desired.
4. **Headcount trend:** The *Headcount Trend Analysis* tab enables employees to see a month-to-month headcount comparison between the current and previous year. It is sorted by different types of staff, such as office and field workers.
5. **Headcount Distribution:** The *Headcount Distribution* tab offers charts that show how Lamprell's workforce is distributed across companies, locations, departments, business units, expense categories, and payroll. This makes it easy to see exactly where the company spends money.
6. **Performance review:** The *F2F Review* tab provides information about the performance appraisal status of employees.
7. **Completion charts:** The two gauge charts at the top show statistics related to task completion. The left chart pertains to employee reviews, the right one to performance planning. These charts make it easy for managers to see how close they are to meeting their annual people management goals.
8. **Status charts:** The two bar charts at the bottom show the status of the employee reviews and performance planning. The *x-axis* in each chart represents the steps in each process, while the *y-axis* represents the number of employees in each pipeline.

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Employee Directory

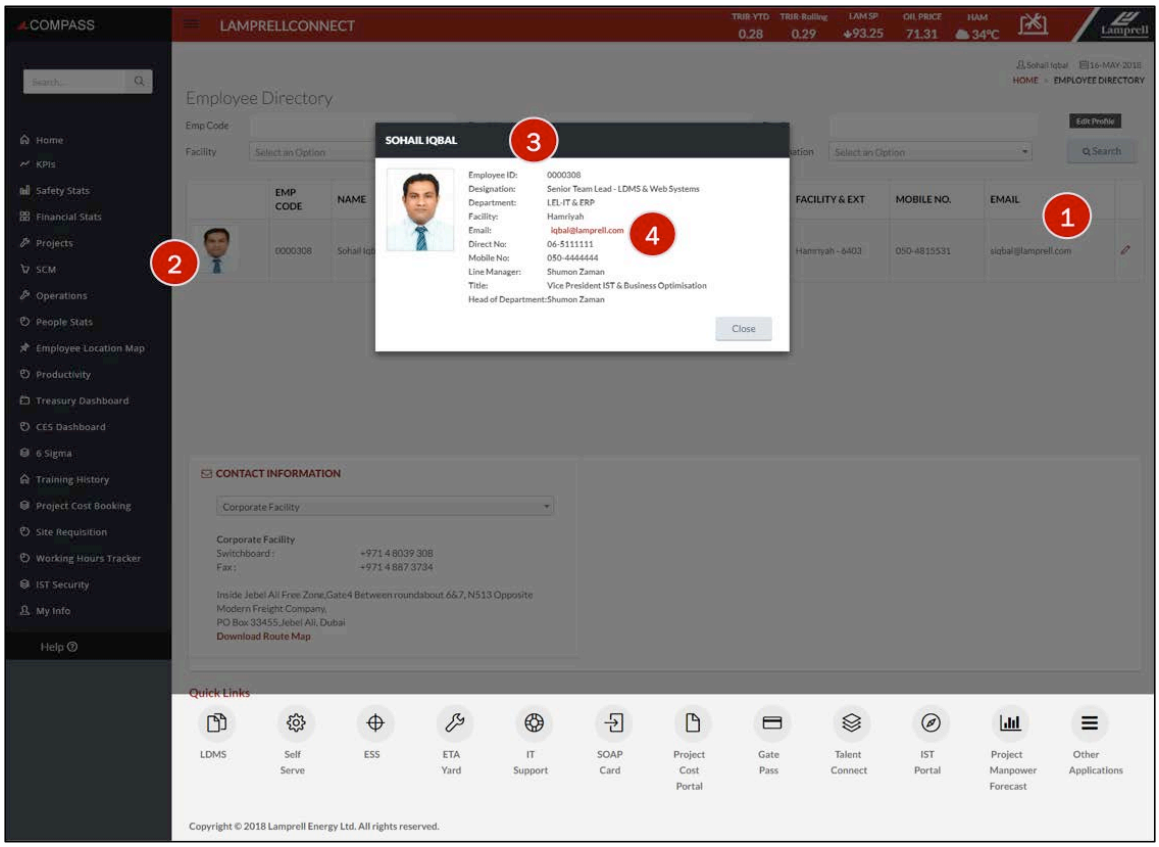


Image 171. Lamprell Intranet *Employee Directory*. Employees can easily find colleagues' contact information in the intranet's *Employee Directory*. *171_Lamprell_10_EmployeeDirectory_live.png*

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Employee Directory, Highlights

Users can search on any criteria in the employee profile—such as name, employee code, or facility—to find colleagues in the employee directory.

1. **Search results:** Results appear in a simple table containing much of the employee's profile information. When an employee document is open (in a lightbox), part of the results continue to be visible behind it.
2. **Photo:** The employee photo makes people easy to identify. Clicking the photo opens the details box.
3. **Profile:** The employee profile includes the following information: name, picture, job title, department, location, email address, phone number, mobile number, manager's name and job title, and the employee's department head.
4. **Email:** Employees can simply click on the email address (an underlined red link) and the system opens the default email client to send an email. Another subtle design nicety: the email address is spelled out, so employees who want to see or copy it can do so.

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Team Forum

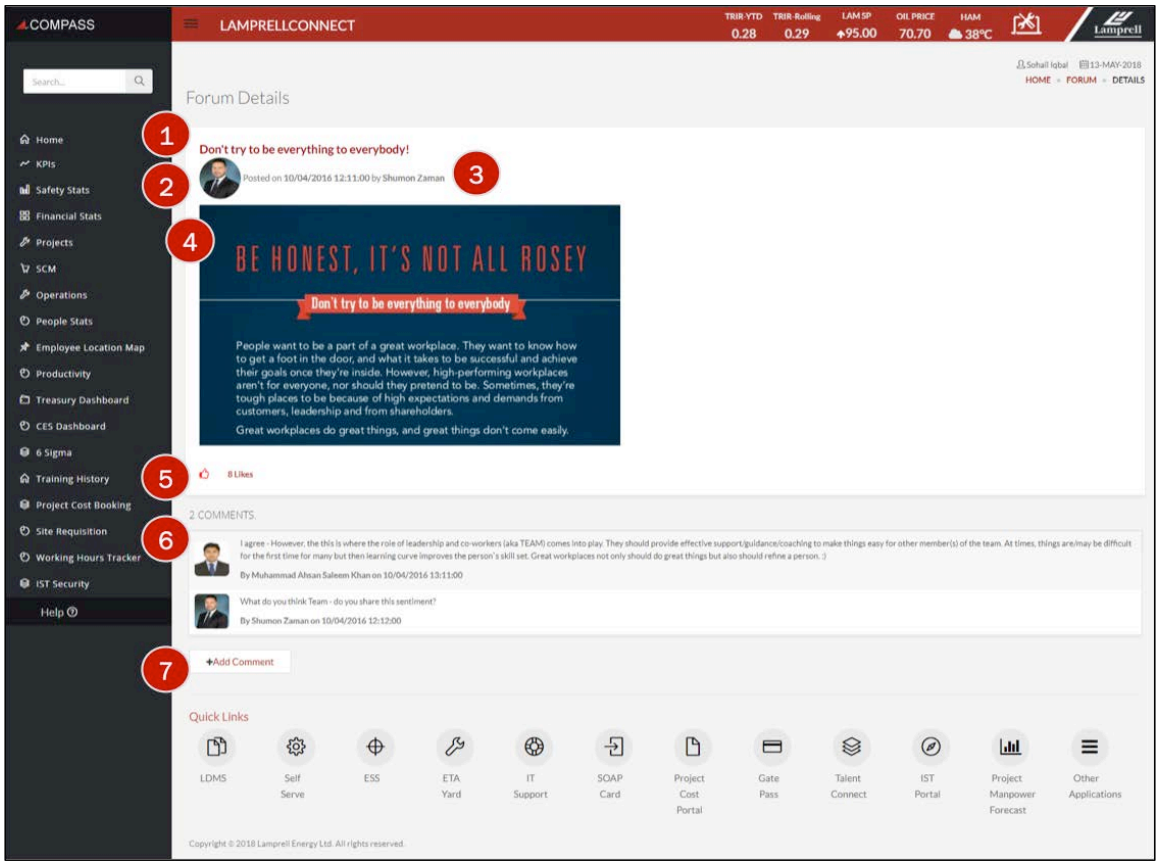


Image 172. Lamprell Intranet Team Forum. The team forum on LamprellConnect allows teams to have lively online discussions. *172_Lamprell_11_Forum_live.png*

Team Forum, Highlights

It's important for employees to have a place online where they can communicate with their colleagues. The team forum is an often-used feature that lets employees share ideas and hold discussions with their team. When an employee posts an article in the forum, the system sends an email to all department staff, as well as selected staff members outside the department. Employees can also disable/re-enable forum notifications.

1. **Title:** The title of the post appears in bold red letters at the top.
2. **Photo:** To make the author recognizable—and remind coworkers that there's an actual person behind each post—a photo of the author appears above the post.
3. **Date, time, and author:** *Posted* is followed by the date and time of day the item was posted, along with the author's name. This lets employees know how recently the item was published.
4. **Post:** The post itself can be simple, or it can be stylized by the user.
5. **Likes:** The number of likes and a like icon appear below the post.
6. **Comments:** The number of comments appears above the comments area. Each comment shows a photo of the commenter, along with the person's name and the time the comment was posted.
7. **New comment:** Users can add a comment by clicking the *Add Comment* button at the bottom.

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My Team

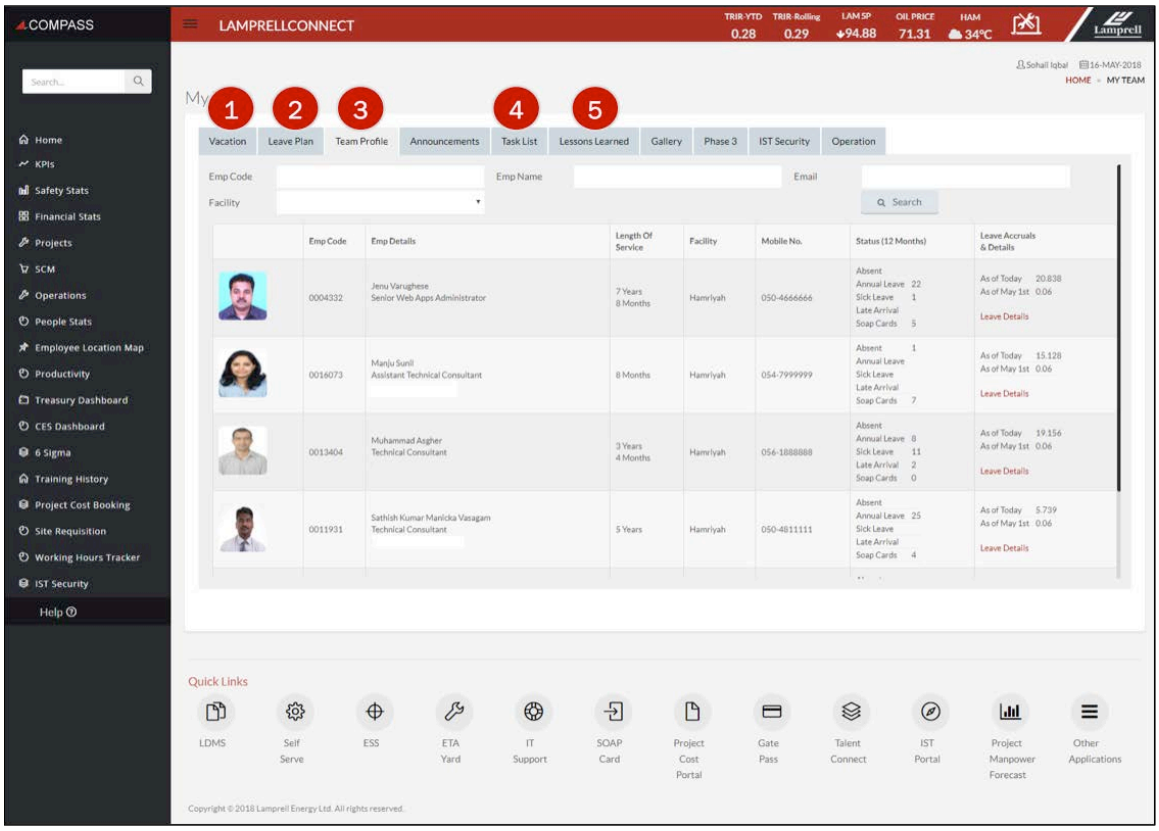


Image 173. Lamprell Intranet *My Team*. *MyTeam* offers all key information about an employee's team or department, including members, tasks, and lessons learned. *173_Lamprell_12_MyTeam_live.png*

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My Team, Highlights

LamprellConnect's *My Team* section offers information about the logged-in employee's team.

1. **Team members on leave:** It's important to know when someone you rely on is out of the office. The *Vacation* tab shows a list of department staff members on leave and includes the employee's photo, name, leave type, leave start and end dates, and a designated staff member to contact while that employee is away.
2. **Leave plan:** Planning for outages is important for keeping projects on schedule and individual workloads manageable. The *Leave Plan* tab lists the future leaves planned within the department, which aids in resource planning.
3. **Members:** The *Team Profile* tab shows the profiles of the employee's team members. The user can get further details by clicking on any team member's picture.
4. **Tasks:** To aid in resource planning, the *Task List* tab shows assigned activities and dates, which the team lead can edit or add.
5. **Lessons:** To foster a focus on constant improvement, the *Lessons Learned* tab shows both positive and negative lesson learned within the department. Employees can add a new entry via the *Add New Lesson Learned* button. Various search and filtering options make it easy to peruse lessons learned.

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Employee's Information

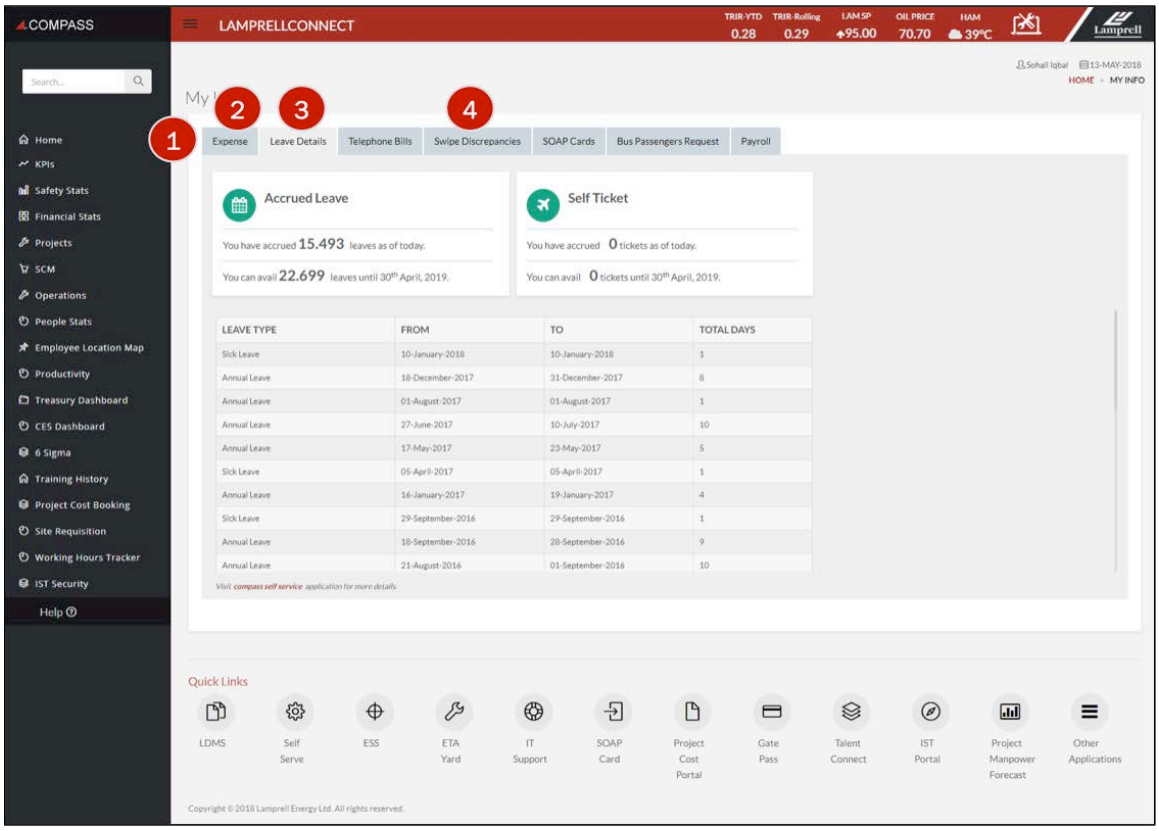


Image 174. Lamprell Intranet Employee Information. Employees can find much of their own information in their *My Info* section on LamprellConnect. *174_Lamprell_13_MyInfo_live.png*

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Employee's Information, Highlights

My Info on LamprellConnect is a place where employees can view information such as their payroll information and accrued time off. Having this information consolidated in one place means employees can find it quickly and trust that it's accurate.

1. **Tabs:** Seven tabs house various kinds of information about the employee's comings and goings. Tab labels—including *Expanse, Leave Details, Telephone Bills, Swipe Discrepancies, SOAP Cards, Bus Passenger Request,* and *Payroll*—are self-explanatory.
2. **Expenses:** The *Expenses* tab is linked to Oracle iExpenses and displays all expenses the employee has submitted. These are sorted by date to make items easy to find. To see more details, employees can click a link at the bottom of the page to the Oracle E-Business Suite.
3. **Time off and airline tickets:** The *Leave Details* tab shows the employee's accrued annual leave in the *Accrued Leave* card in the upper left. This displays how many days of leave the employee has accrued to date, as well as how many days can be accrued by the end of the accrual cycle. The table below this displays the already-used leave time specified by *Leave Type* (such as *Sick* and *Annual),* the dates of leave, and the *Total Days* taken off during that period. A benefit for some employees is to accrue airline tickets for their own and their family's personal travel. The balance appears in the *Self Ticket* card in the upper right of the *Leave Details* area. Information on this page is fetched in real-time from Oracle HRMS, so it is current. Employees can view more details by clicking the red *Compass self service* link at the bottom of the page, which leads to an Oracle application.
4. **Attendance:** All employees are required to swipe in and out of work with their ID card. Card swipe issues are detailed on the *Swipe Discrepancies* tab. Employees can use this page to ferret out discrepancies and take necessary actions to avoid a pay reduction. The tab has three sections: 1) dates of swipe discrepancies, 2) swipe correction requests the employee has made that are pending approval, and 3) dates on which the employee has been late for work. Employees can report a discrepancy via a link to *ESS* (Employee Self Service) at the bottom of the tab.

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My Connect Canteen

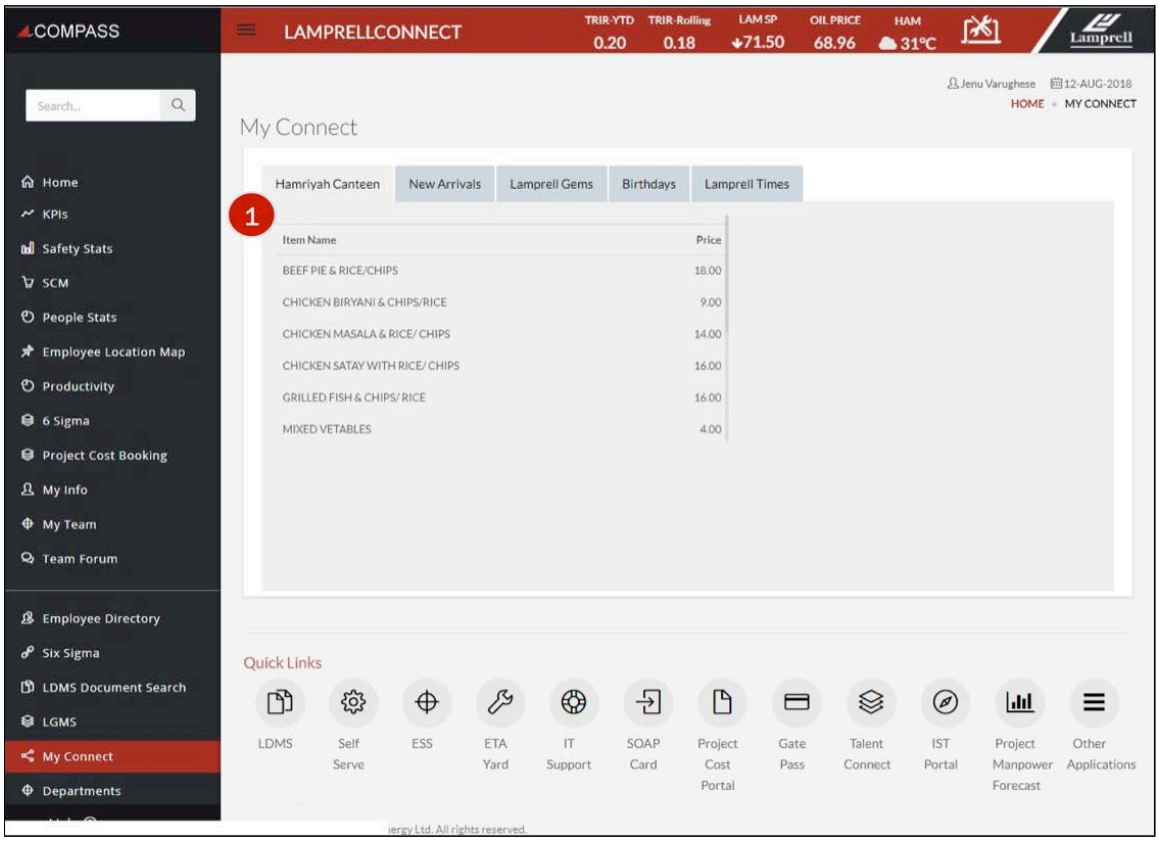


Image 175. Lamprell Intranet *My Connect Canteen*. The *My Connect* section is the intranet equivalent of a hug. One warm and yummy example is its *Canteen* cafeteria menu, which includes prices.
175_Lamprell_14_MyConnect_Canteen_Tab_Live.png

My Connect Canteen, Highlights

The intranet's *My Connect* area offers pleasant information that helps connect employees—somewhat like a "business hug." For example, the *Birthdays* tab shows people whose birthdays are in the upcoming week, so their colleagues can wish them a happy day and be extra nice to them. Likewise, the *Lamprell Gems* tab shows photos of employees who have worked at Lamprell for 10 years. Colleagues can be inspired by such information and also know to wish these folks a happy anniversary.

All information is updated in real-time and linked with the Oracle HR database.

1. **Cafeteria menu:** The *Hamriyah Canteen* tab covers the daily menu and prices. The screen is linked with the canteen management system.

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My Connect New Arrivals

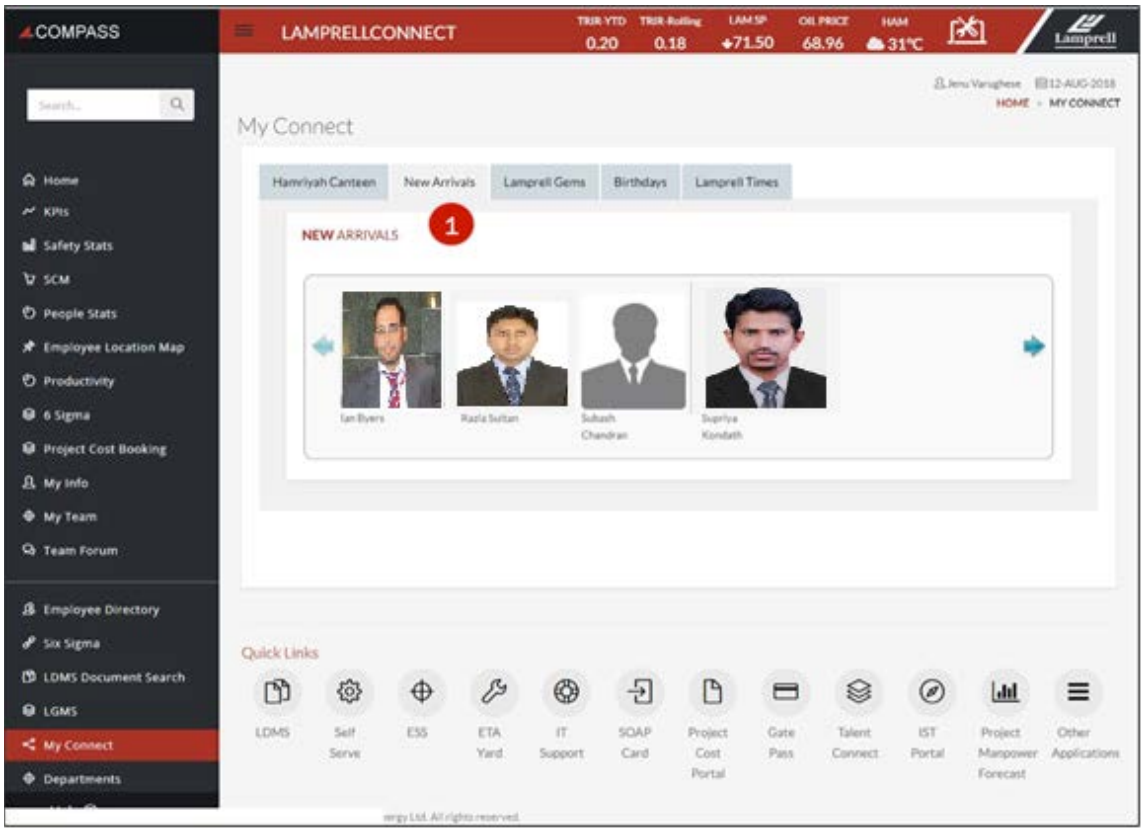


Image 176. Lamprell Intranet *New Arrivals* Tab. Employees hired recently are showcased in the *New Arrivals* tab.
176_Lamprell_15_MyConnect_NewArrival_Tab_1_Live.png

New Arrivals, Highlights

Employees who joined Lamprell within the previous 10 days appear on the *New Arrivals* tab. This information can help make the new hires feel welcome and makes it easier for other employees to break the ice and welcome them. These data are fetched from the Oracle HR module.

1. **Pictures and names:** Pictures and names make new hires recognizable. Clicking a photo displays the new hire's name, job title, and department.

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My Connect Lamprell Times

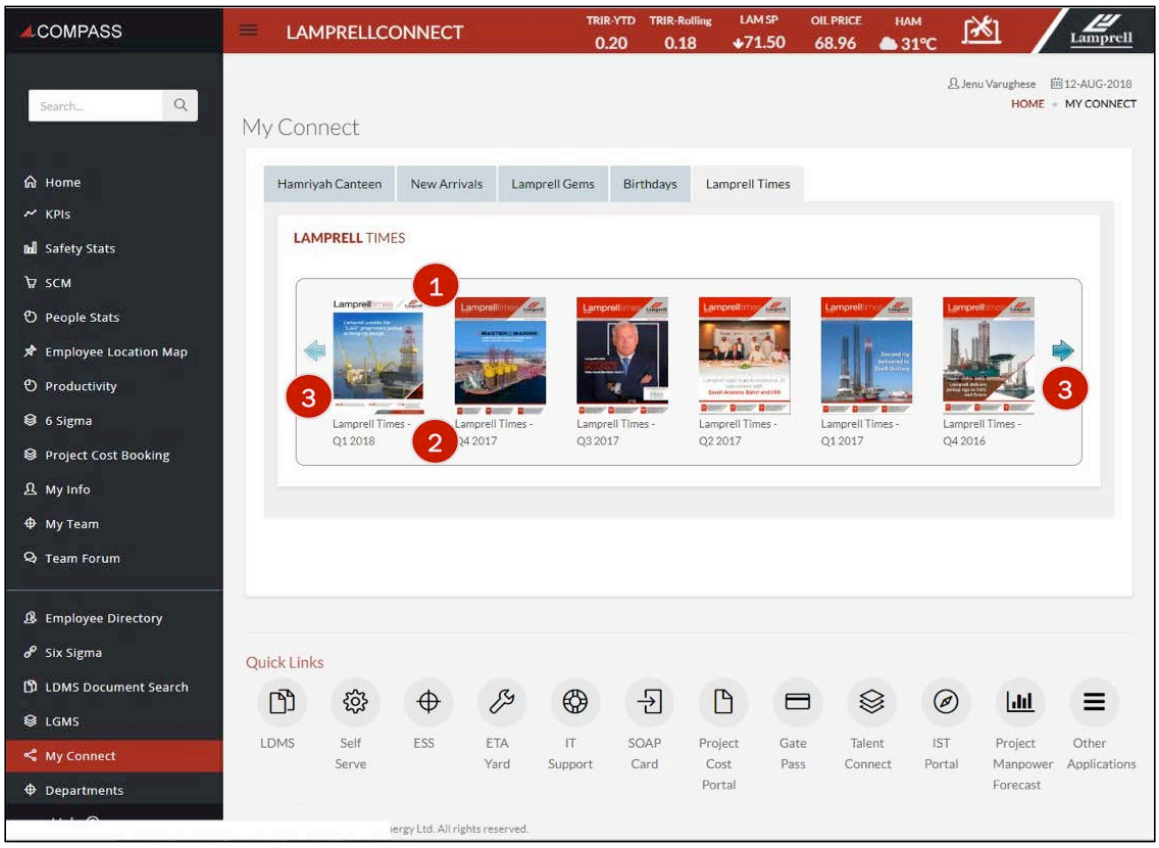


Image 177. Lamprell Intranet *Lamprell Times* Tab. Employees can read the company's quarterly magazine issues published in the current year and as far back as 1993. *177_Lamprell_16_MyConnect_LamprellTimes_Tab_Live.png*

Lamprell Times, Highlights

Employees can access Lamprell's quarterly magazine, *Lamprell Times*, from 1993 to the present in the *Lamprell Times* tab.

1. **Cover:** Each magazine's cover image gives an idea of some of the issue's content and may be recognizable to some employees. Clicking on a cover image opens that issue.
2. **Date:** The year and quarter of publication appears below each cover image.
3. **Navigate:** Blue forward and backward arrows allow employees to scroll through the offerings.

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Section Page

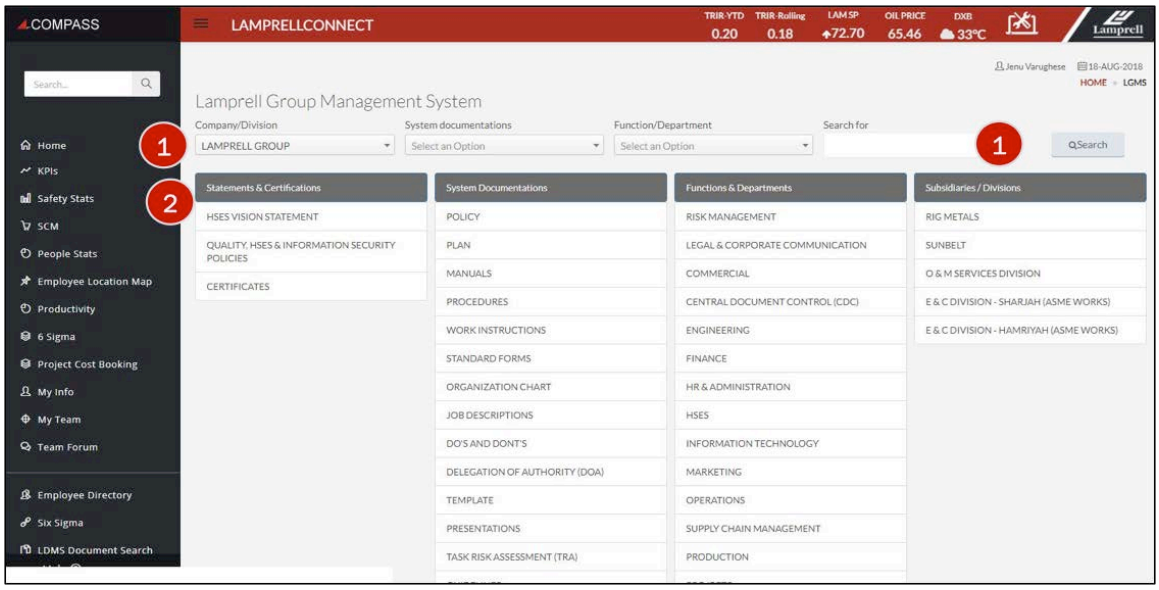


Image 178. Lamprell Intranet Section Page. Employees can find most forms, organization charts, and information about policies and procedures on the *Lamprell Group Management System* section page.
178_Lamprell_17_LGMS_LandingPage_live.png

Section Page, Highlights

The *Lamprell Group Management System* section is a one-stop-shop for policies, procedures, forms, organization charts, and more. User can either scan a list, search by type, or search for keywords. All employees, regardless of their knowledge or how they typically approach the task of finding information, will benefit from this section's options.

1. **Search:** Employees can search for a document by *Company/Division*, *System documentation,* and *Function/Department.* This is helpful when employees know a document's origin but not its name. They can also use the open search field to type in a query.
2. **Browse lists:** Lists of resources sorted into four categories make it possible for users to scan for what they need.

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Search

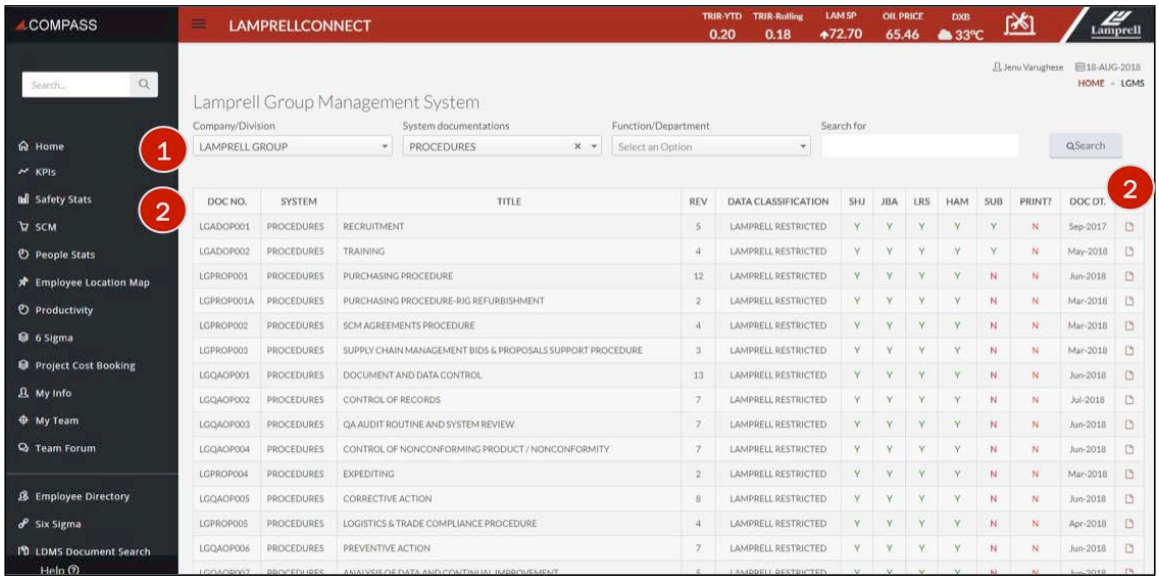


Image 179. Lamprell Intranet Search. Employees who searched for information on the *Lamprell Group Management System* section page can download policies and procedures from the SERP.
179_Lamprell_18_LGMS_SearchPage_live.png

Search, Highlights

Selecting from the drop-down lists at the top of the page returns results related to the selected topics.

1. **Filter lists:** Drop-down lists retain the selections, so that users can see the criteria they searched on.
2. **Results table:** The table displays pertinent information about each result, such as document number, title, and its host system. In the rightmost column, users can click the paper icon to download the document.

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Document Search

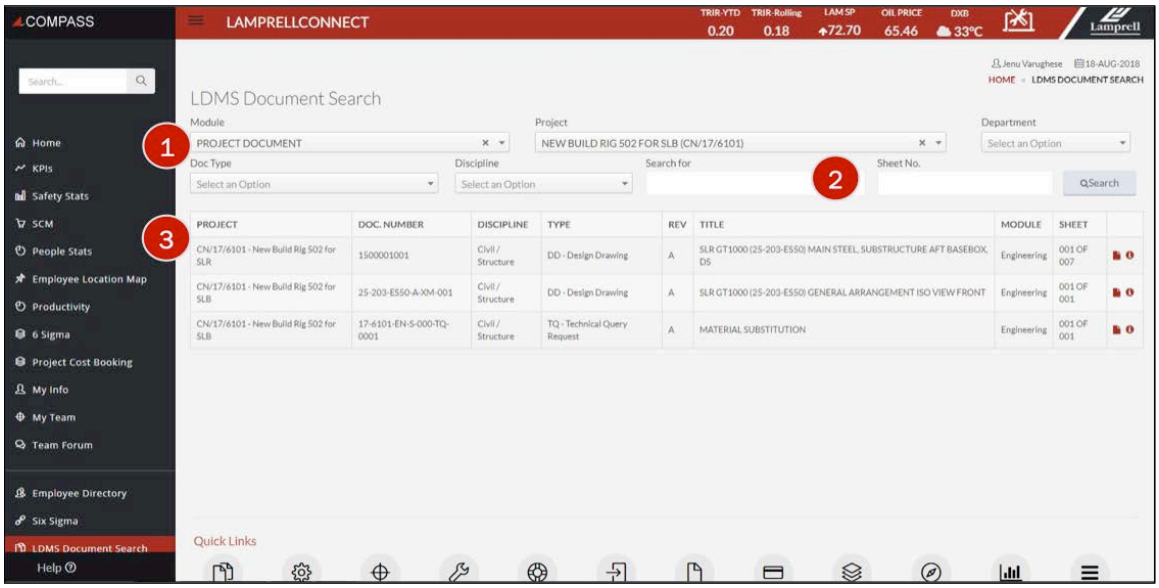


Image 180. Lamprell Intranet *Document Search*. Users can search on LamprellConnect for documents, even ones stored in a totally different system. *180_Lamprell_19_LDMSPage_live.png*

Document Search, Highlights

The document search feature allows employees to search and view documents from the Lampress Document Management System (LDMS), a different application that is linked in real-time to LamprellConnect. Users can search by keywords or choose from topics.

1. **Filter lists:** Drop-down lists provide filters that employees can use to refine their search.
2. **Search field:** An open search field lets employees who know what they are looking for type in a query. If they know the *Sheet number* they need, using that field expedites their search.
3. **Results table:** Information about each document that matches the search criteria appears in the table. Each uploaded document is secure, so employees view only those documents for which they have assigned rights.

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Weather

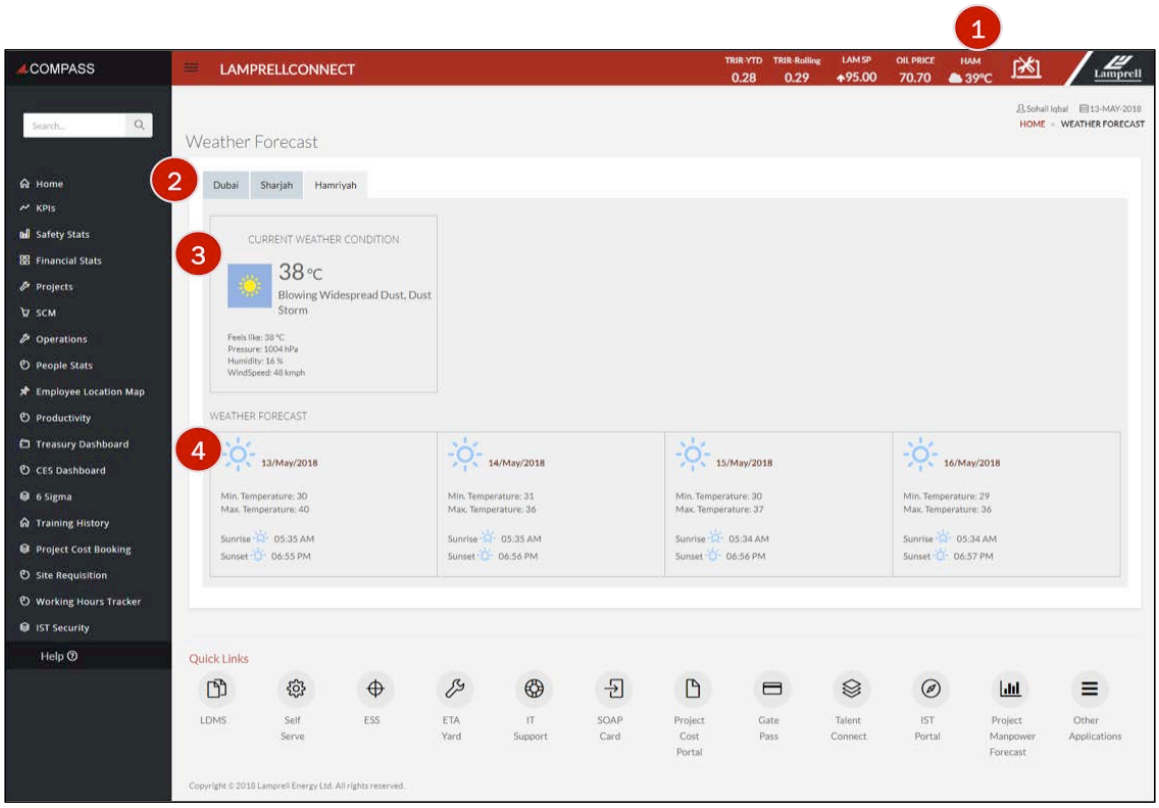


Image 181. Lamprell Intranet Weather. The *Weather Forecast* page provides the current weather and a four-day forecast for key Lamprell locations. *181_Lamprell_20_Weather_live.png*

Weather, Highlights

Weather is very important to companies in energy-related industries, and Lamprell is no exception. Thus, the intranet provides detailed weather information and forecasts.

1. **Icon:** Employees access this page by clicking the temperature icon in the upper right of the top header, or by clicking the *Weather* tab on the homepage.
2. **Location:** Tabs at the top of the *Weather Forecast* page let employees choose from a few key locations. By default, the tab corresponding to the logged-in user's location is selected. The information on this page is real time.
3. **Current:** A card at the top of the page displays the current weather, with an icon showing conditions (such as sunny or cloudy) along with the temperature, pressure, humidity, windspeed, and any other relevant conditions (such as a dust storm).
4. **Four-day forecast:** Four cards each display the date, minimum and maximum temperature predicted, and time of sunrise and sunset.

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Locations

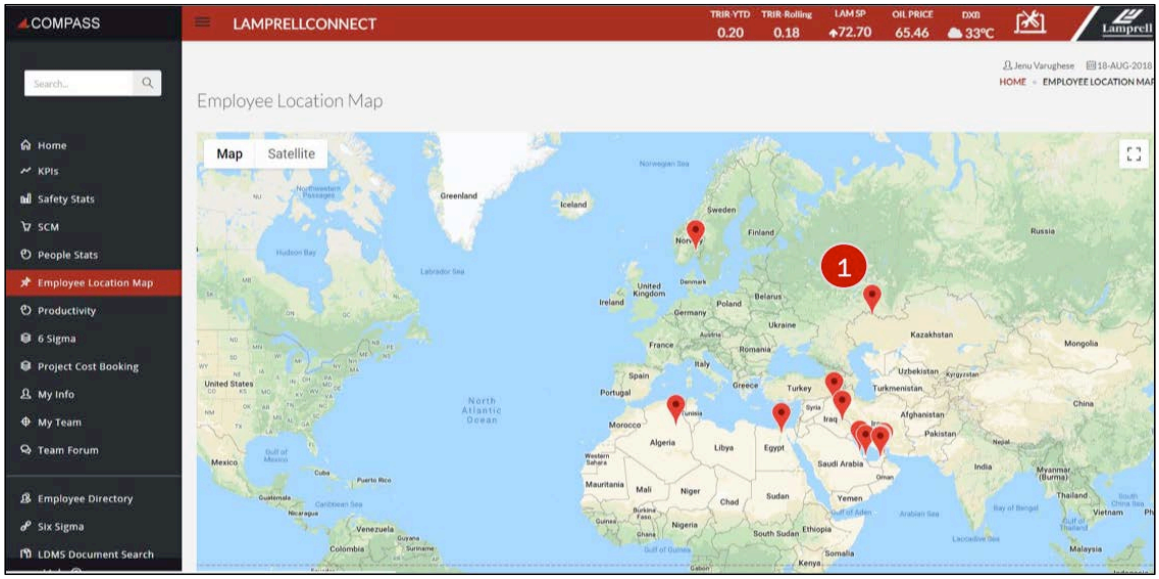


Image 182. Lamprell Intranet Locations. The map shows where in the world Lamprell employees work.
182_Lamprell_21_EmployeeLocationMap_live.png

Locations, Highlights

The *Employee Location Map* shows geographic locations.

1. **Markers:** Red icons indicate Lamprell work locations.

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DESIGN PROCESS AND USABILITY WORK

The team's approach to design was very straightforward. First, it conducted a user survey to identify the current intranet's limitations and determine user expectations. Team members also met with managers and heads of departments and analyzed frequently used sections of the previous intranet, along with the business applications that needed to be prioritized.

After designing the layout, team members conducted several interactive sessions with super users from each department to get feedback they needed to finalize the screens and prioritize which information blocks to display.

The initial version was released to the IST team as a sort of beta test both to check performance and to give the design team more ideas about how real users would interact with the design. This beta period also allowed the team to test the site on different devices and verify the dashboards with business applications for a real-time comparison with the previous version of the Lamprell intranet.

After this initial release, the rollout was a gradual, iterative process: the team added groups and collected feedback in phases until the entire organization had access to the new platform. The team received mixed feedback from the initial launch phase. Some users resisted the new intranet because they were familiar with the old template, its content style, and its navigation. Still, the team forged ahead with the feedback and launched a later version to the senior executives. Then, later versions were launched for every department.

GOVERNANCE

Ownership

The Corporate Communications/IST Team owns the intranet. This ownership has made it easy to make changes when business requirements mandate new features. The ownership structure makes improvements more personalized, swift, and effective, as any requested change is first reviewed by the Communication team to ensure that the content is both accurate and approved by legal. Once approved, IST takes immediate action on the request and rolls it out across the organization.

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INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
Corporate Communications Team	• Provides governance, program management, coaching, and support • Responsible for the content and features available on the group intranet level
IST Team	• Responsible for enhancements and updates
Content Owners	• Each department has a nominated user to manage its content • Content is verified and approved by the respective managers and Corporate Communications before published

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URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	http://lamprellconnect
Default Status	The intranet is set as the default homepage for all users, through Microsoft Windows group settings. Users cannot override this setting.
Remote Access	Remote users can access the intranet after connecting to the Lamprell network through VPN.
Shared Workstations or Kiosks	Kiosks and shared workstations are placed in the yard so that employees can access applications related to their work. For example, yard employees need access to SOAP Cards and to the time-booking module, where employees fill in the time they worked on each project on a daily basis.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
2007	• LamprellNet: First company intranet launched
March 2010	• LamprellConnect version 1 launched
February 2016	• LamprellConnect: Design and development of new version started
October 2016	• LamprellConnect: Launch of new design (current version)

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CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Contributors	• Each department has its own nominated contributor to upload announcements and articles.
Contribution	• Departments can also publish announcements and notify all users or specific active directory groups, as well as upload department specific documents, such as HSES information.
Training	• The team created tutorial videos for users, managers, and executives that are available on the intranet.
Maintaining Quality	• Department managers, delegated users, and members of the Corporate Communications team verify and approve content before it is published.

TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Windows server 2012
Bug Tracking / Quality Assurance	• In-house application
Design Tools	• Visual Studio 2015
Site Building Tools	• Visual Studio 2015
Content Management Tools	• Custom CMS developed in-house
Search	• Custom search functionality

ROI

ROI for the Lamprell intranet can be measured in time savings for the approvals process and in letting employees access information from a single platform instead of having to log in to multiple applications. The team also notes the following improvements:

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KPIs

- Compared to the previous Lamprell intranet, usage has increased due both to the availability of real-time information and a single-platform approval process.
- Daily site usage is monitored to ensure smooth functioning of the site across the organization.

Softer Measures

- The intranet's user satisfaction rating increased to 97%.
- Users can now access real-time information easily.
- An average of 600 people use the Lamprell intranet each day.

LESSONS LEARNED

The team shares some of its project learnngs.

General Lessons

- Keep project scope focused and measurable
- Implement a change management plan
- Measure results over and over
- Periodically review the progress against agreed upon milestones
- Choose the right team members to ensure that you have the right mix of skill sets to complete the project
- Clearly establish roles and responsibilities within the team

Best Practices

- Include representatives and SMEs from different departments
- Include error logging and debugging features in your application
- Create a flow diagram for the application that shows which services it interacts with and the types of requests made of the services
- Choose a modular and optimal design
- Empower developers to create a roadmap, follow it, and make technical decisions, as they understand the details of their work like no one else

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Messer Construction Co.

OVERVIEW

COMPANY

Messer Construction Co. is an employee-owned company that specializes in managing, developing, and performing complex commercial construction and delivering value to clients through quality construction experiences. Since 1932, Messer's track record of success can be traced to past and present architectural icons and institutions located across the Midwest and Southeast. With a sustained commitment to excellence and doing the right thing, it builds its projects safely, on-time, on-budget, and with the utmost craftsmanship, innovation, and care.

Headquarters: Cincinnati, Ohio, US

Company locations: Messer Construction Co. has 10 offices throughout the Midwest and Southeast.

Locations where people use the intranet: Employees at all of Messer's 10 regional offices, construction jobsites, and Corporate Support offices use the intranet.

Annual revenue: $1.12 Billion

THE INTRANET

Users: Approximately 800 employees; the company has 1,200 employees total, but the majority of them do not have an O365 account, though they can sign-in at a shared workstation. Messer employees use the MyMesser intranet to access the information and resources they need to do their jobs, understand the company and business, and engage with other employees. They also use the intranet to access their personalized professional development and benefits platforms.

Mobile approach: Responsive web design

Technology platform: O365 SharePoint Online

TEAM

Design team: A team of four designed the UI and front end. The UX and design team was responsible for the IA, content strategy, UI design, and SharePoint theming. A software development team, consisting of four developers, completed the SharePoint and front-end development.

Leadership: Bethany Smith, Messer Marketing & Corporate Communication Vice President; John Carder, Messer Vice President, Information Technology & CIO.

Design (Creative Services): Michelle Hendrickson, Cardinal UX Practice Manager; Stephanie King, UI Designer; Adam Keller, UI Developer; David Brun, Messer Graphic Designer.

Development: Matt Tallman, Modern Workplace Practice Manager; James Grizzle, SharePoint Architect; Zac Brumbaugh, SharePoint Developer; Susan Critzer, SharePoint Developer; Kim Schaff, Messer SharePoint Admin.

Project services: Katie Cozad, Cardinal Project Management; Blake Porter, Business Analyst; Nan Hatch, Business Analyst; Scott Grothaus, Messer PMO Director.

Content strategists: Jessie Folmar, Messer Senior Public Relations Manager; Jackiedra Wilson, Messer Senior Marketing Manager; Nick Apanius, Messer Operations; Andy Burg, Messer Operations.

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INTRANET TEAM



Team members shown here (back row, left to right): Adam Keller, James Grizzle, David Brun, Matthew Tallman; (middle row, left to right): Zac Brumbaugh, Kim Schaff, Scott GrotHaus (tablet), Jessie Folmar, Jackiedra Wilson, Michelle Hendrickson, Susan Critzer, Blake Porter, Andy Burg (tablet); (front row, left to right): Katie Cozad, John Carder (tablet), Bethany Smith, Nick Apanius (tablet).

HIGHLIGHTS ABOUT THIS WINNER

At Messer Construction Co., in-house designers and developers merged harmoniously with the agency they hired. As a team, they meticulously researched the users, their tasks, and their needs—and together they created MyMesser, a highly supportive solution for employees in the field or in the office.

- **Celebrating employees:** Messer Construction Co. fosters a culture of celebrating its employees and recognizing them. Executive promotions, new employees, and work anniversaries are all prominently showcased on the homepage.

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- **Project information:** Descriptions, teams, photos, and live video feeds are just some of the ways employees stay abreast of all the construction projects the company is involved with. Consistently sharing this information with everyone ensures that all employees feel that they are part of the team. It also helps them get excited about the work the company produces and find new and creative ways to support the business.
- **Skilled trade workers section:** In-depth user research revealed the necessity for skilled trade workers—also known as the *Craftforce* at Messer—to have immediate access to checklists and resources while working in the field. A special section of MyMesser consolidates much of what they need in one place, and is usable on mobile devices; this is critical because, unlike business-side employees, Craftforce employees primarily access MyMesser on smart phones. This is an example of how the team thoroughly investigated its employees' needs, defined the challenge, and then created a design solution that not only supports the core business tasks, but also aligns with company values.
- **Communication:** News, short videos from leaders, and project information are all used to help keep employees informed, interested, and invested.
- **Work and life balance:** The intranet makes it easy for employees to see health benefits, discounts, time off, and more.
- **Team volunteerism:** Employees are encouraged to volunteer and improve the community around them. Their plans and efforts are shared on MyMesser in places such as the events calendar and *Community Report*.
- **Mobile:** The site is responsive, and more than 75% of its users access MyMesser on smart phones or tablets. Stakeholder involvement contributed to decisions about which content should appear on mobile and how. More importantly, user research—including task prioritization exercises—helped the team determine which features should take precedence over others, and whether to remove some features completely or just from one channel. Also, the mobile design accounts for key factors such as screen size, page load time, and data plan usage.
- **UX research infrastructure:** The team concentrated its user research in the most impactful activities, such as discovery interviews and meetings, focus groups, interviews, surveys, card sorting, and creating and using personas. Choosing the right research method at the right time helped the team make confident, thoughtful design decisions.
- **Departments and regions sections:** Site areas aimed at supporting different departments and regions have a consistent design, which helps employees more easily glean the same types of information no matter which group or location they are attempting to learn about.

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- **Breadcrumbs:** Breadcrumb trails are an oldie, but they're still a good feature. They help users stay anchored, discover more about the available site sections, and more easily navigate up a level in the site structure.

BACKGROUND

Goals

Messer wanted to design and implement a responsive, best-in-class employee portal that would strengthen the company's online presence with users—especially those disconnected from the office buildings. The design team also wanted to improve the UX and increase adoption. The new portal design was aimed at meeting all of these goals.

The new site is vastly different than the last two iterations of the company's intranet, which were glorified message boards. Those sites had navigation that wasn't intuitive; ineffective search functions; and zero optimization for mobile. The new site supports both the business and the Craftforceteams. These two groups had different site needs; through discovery sessions and IA workshops, the intranet team was able to design one solution that effectively supported the needs of both.

Challenges

The team faced two primary challenges in designing a new portal to replace a failing intranet:

- **Diverse workforce:** The design team knew that the biggest challenge was going to be the company's diverse workforce and the way people used (or didn't use) the company's legacy intranet.
- **Overcoming a bad reputation:** Because its business is distributed, Messer has many regional offices, which results in a lot of content that needs continual distribution. The legacy intranet had earned a bad reputation with users because it lacked both content strategy and content governance. As a result, users could not find what they were looking for—and what they could find wasn't always the one source of truth.

Approach

The project originated in both the marketing and IT departments equally, and there was some urgency to get it rolling. The Messer marketing team kicked off the project with a discovery roadshow and analytics overview to help determine user needs before bringing in its agency partner. That partner, Cardinal Solutions, was able to take the initial discovery work and meet with stakeholders to create a solution vision. Once the vision was in place, the project continued with a discovery phase followed by design and roadmapping for the future phase of development.

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DESIGN REVIEW

Homepage

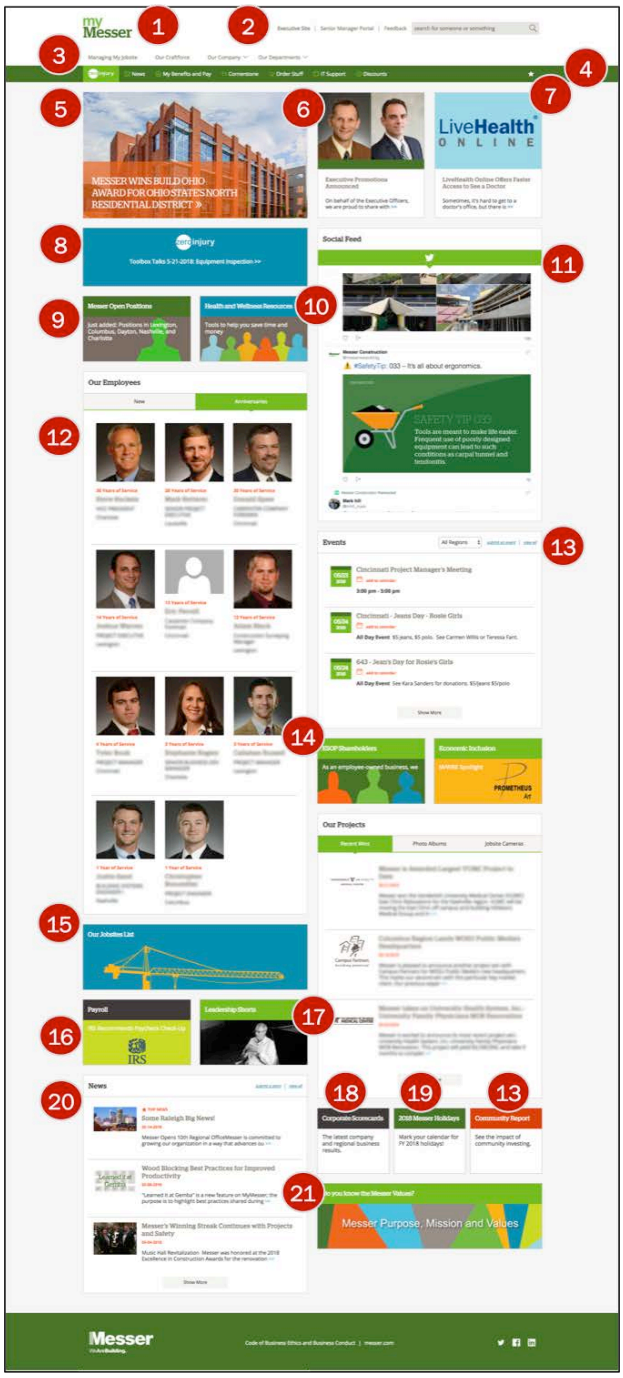


Image 183. Messer Construction Co. Intranet Homepage. The MyMesser homepage is a portal to important content that employees need to help them do their jobs. *183_Messer_01_Home.png*

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Homepage, Highlights

On this homepage, users can find everything from news to employee promotions and new hires. It also features information on work projects and how to stay safe on the job. It is chock-full of information, yet not overwhelming. The consistent style, diversity in content types, chunking and headings, and whitespace between sections makes the page scannable and manageable. And, all in one place, Messer employees can find much of what they need to stay informed and feel like they are part of the company team.

1. **Logo:** The *MyMesser* logo appears in the upper left of all pages. Given that there are other portals at the organization, this logo helps employees stay grounded when they are using MyMesser.
2. **Utility navigation and search:** Utility navigation and search are located to the right of the logo, and subtle links to the *Executive Site* and the *Senior Manager's Portal* appear at the top of pages. These sites are important enough to warrant this prominent page real estate, but the small light grey links ensure that they won't distract those employees who don't have access to or don't use those sites. Likewise, the *Feedback* link is there for those who want it, but it's not in the way for those who don't. The search field is flexible and always available. It beckons users to type a topic or a name.
3. **Global navigation:** Grey links on a white background comprise the site's global navigation. Extensive user research, including card-sorting research studies, helped the team confidently create this narrow menu structure with only four first-level choices: *Managing My jobsite, Our Craftforce, Our Company,* and *Our Departments.* The star icon on the right leads to favorites, so users can easily access their saved pages.
4. **Popular links:** User research not only informed the global navigation, it also helped dictate which site areas are most important to employees and which are the most accessed. The *Quicklinks* section, which appears in green just below the global navigation, showcases some of the most-needed parts of MyMesser. Only the seven most important items are awarded space in the green action bar, so users can easily find the key commands without being overwhelmed by too many choices. Only design discipline—grounded in good user research—gives teams the confidence to make bold decisions such as this.
5. **Key news story:** An important recent news item is allocated the homepage's first, leftmost content block. A related photo accompanies the headline, which acts as a link to the full story.
6. **Executive promotions:** It is in Messer Construction Co.'s culture to celebrate executive promotions. These are announced on the homepage, with executive photos, to humanize the stories.
7. **Online doctor visits:** eVisits with doctors are becoming more and more common. To allow employees the most flexibility possible, as

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well as access just-in-time medical care, Messer Construction Co. offers eVisits as part of its health benefits. These are advertised on the homepage in a prominent spot that also displays new benefits, events, articles, and so on.

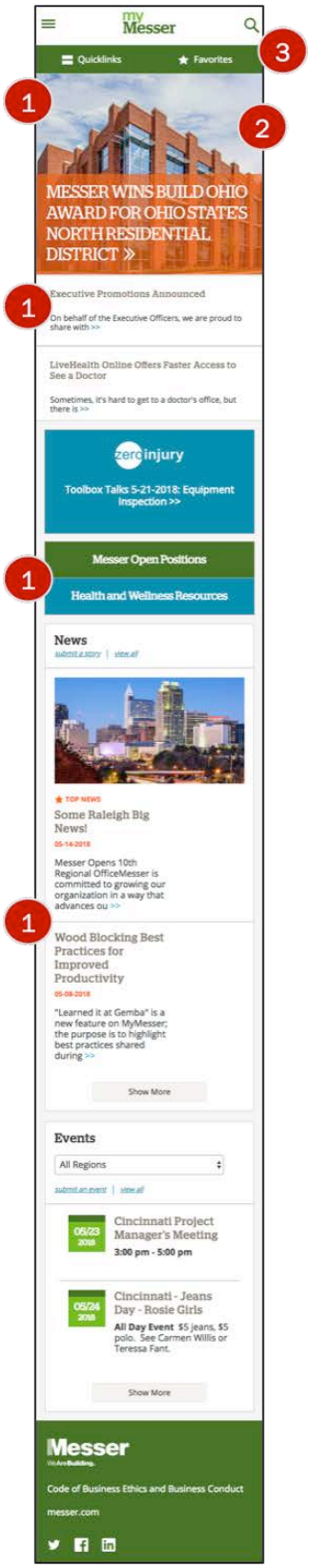
8. **Zero injury:** Construction can be a dangerous business. Understanding this, Messer emphasizes the health and safety of its employees in the field, and everywhere else. The homepage's *zeroinjury* section advertises weekly mini-newsletters to promote hazard awareness and help employees stay safe and healthy.
9. **Job openings:** Understanding that retaining employees and encouraging upward and lateral movement within is healthy for both employees and organizations, Messer advertises open positions on the homepage. The *Messer Open Positions* block lists the locations of the newest open positions.
10. **Work life balance:** Messer strives to ensure that employees are content outside of work also, as it makes for a happier human and a better employee. The homepage's *Health and Wellness* section leads to a site section that helps make employees' life a little easier.
11. **Social:** A large *Social Feed* section displays Messer's Twitter feed (@messerwearebldg), which is the most active social platform for Messer. Displaying it on the intranet's homepage helps employees stay up-to-date on what clients and partners are saying about the company.
12. **Employees:** The *Our Employees* section uses about a fifth of the entire homepage, demonstrating the importance of celebrating individuals. The *New* tab displays new hires, so fellow employees can see which roles have been filled and get to know the people who filled them. The *Anniversaries* tab shows photos, names, and job titles of employees having a Messer work anniversary. It's fun for employees to see and congratulate their coworkers—whether they are new coworkers or those who have worked at the company for more than 30 years.
13. **Volunteerism:** The *Events* calendar lets employees share information about events they plan to volunteer for. Further, the *Community Report* section leads to information about how Messer and its employees have worked to improve the community around them.
14. **Shareholders:** The *ESOP Shareholders* section reminds employees that Messer is an employee-owned business, and leads to information about their shares and the company's performance, along with four short videos that explain how the ESOP works and how it benefits employees in the long run.
15. **Projects:** Construction projects are the core of the business. Whether employees work on the job sites or in the home office, they want to see the work the company is producing. The homepage's *Our Projects* section displays news about recently won projects *(Recent Wins* tab),

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a gallery of images from the jobs (*Photo Album* tab), and live video feeds from the current job sites (*Jobsite Camera*). The *Our Jobsites List* section, which appears on the left of the homepage, links to all the job sites, current and completed. This is another way for employees to learn about the details of the core work, to see what their colleagues do, and to find new ways to support the business.

16. **Payroll:** Employees use the easily accessible *Payroll* area to fill out their timecards.
17. **Leader messages:** *Leadership Shorts* links to video messages about all levels of leadership, from Craftforce to executives. This is one more way that managers include all employees on their corporate journey.
18. **Corporate performance reports:** The *Corporate Scorecards* section links to reports about how the company is doing compared to its competitors.
19. **Holidays:** Another part of work/life balance includes time away from work. Employees can see a list of holidays for the current year on the homepage so they can plan ahead for both work and play.
20. **News:** A few of the top news items appear on the left near the bottom of the page. A title, date, clip of the article, and related image make the list easy to digest.
21. **Mission:** To remind (or teach) employees about the company mission, purpose, and values, a link to these appear toward the end of the homepage.

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Homepage, Mobile

Image 184. Messer Construction Co. Intranet Homepage Mobile View. Content and navigation is optimized for mobile on the MyMesser intranet. *184_Messer_02_Home_mobile2.png*

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Homepage, Mobile Highlights

When researching with users for the MyMesser redesign, it was obvious early on that everyone—from the support team in the back office to individuals on the jobsite—wanted mobile capabilities. In particular, field workers who need access to processes and safety documents would benefit from access on their mobile devices. The new site is responsive, though a few sections are not available on mobile. The team determined which content and features should be on mobile and the order and way in which they should appear. These topics were discussed during several phases, including discovery, content migration, and content strategy priority sessions.

1. **Images shrunk or removed:** On mobile, several images that appear on desktop are either excluded or made smaller to accommodate the mobile screen size, ensure fast page load time, and be mindful of employee data usage. The main news item appears at the top of the screen, in a high-priority position than on desktop. But the related image is smaller, and the headline banner spans the entire image on mobile. Unnecessary images—including purely aesthetic ones, such as the colored silhouettes in the *Messer Open* Positions and *Health and Wellness Resources* graphics—don't appear on mobile, but the consistent green and blue colors make the sections recognizable. Likewise, photos are not included in the *Executive Promotions* section and with some news items.
2. **Priority:** The high-priority features appear toward the top of the mobile screen. Some content, such as new employee and anniversary announcements, were omitted from mobile. Similarly, the Twitter feed does not display on mobile since it has its own app.
3. **Navigation:** The global navigation, quicklinks, and search are all collapsed under icons to make the most of the screen real estate.

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Navigation, Mobile

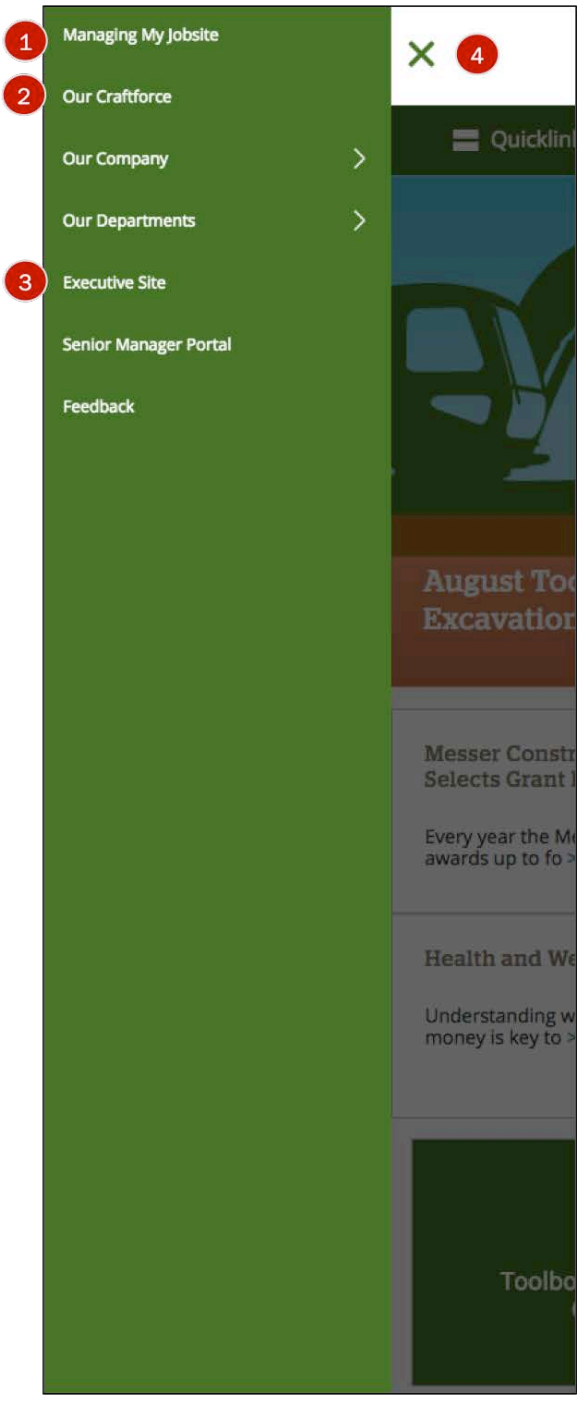


Image 185. Messer Construction Co. Intranet Mobile Navigation. The expanded hamburger menu includes links from the global navigation and utility navigation. *185_Messer_03_Home_mobile3.png*

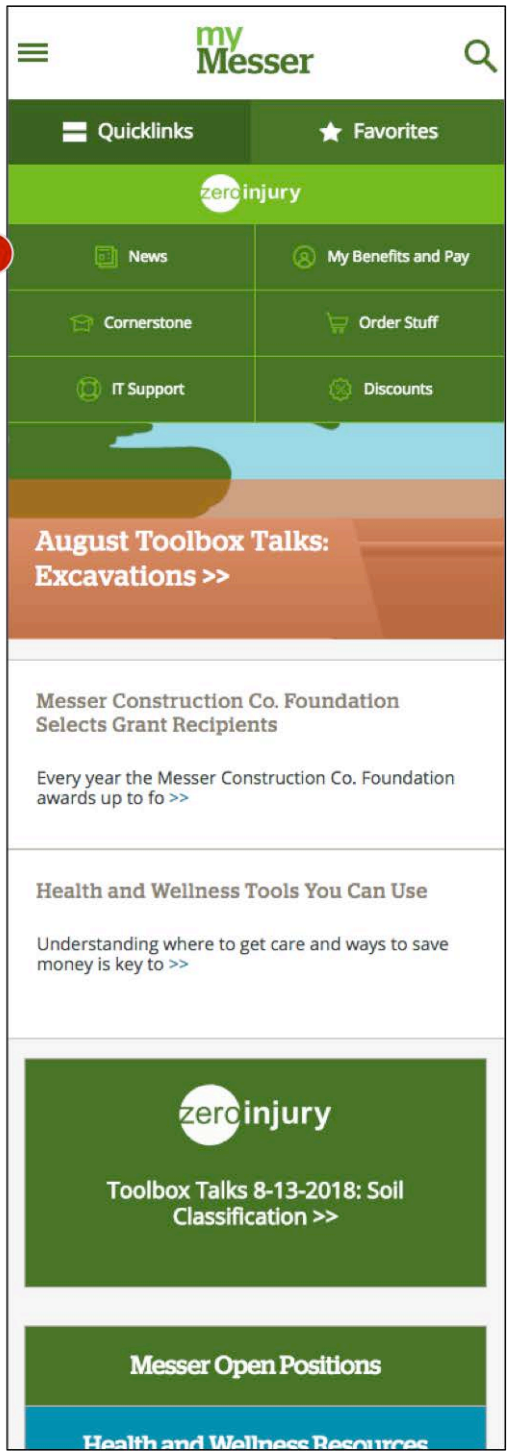
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Navigation, Mobile Highlights

The global and utility navigation links are combined under the hamburger menu in the MyMesser mobile view.

1. **Pillars:** When users tap the hamburger icon to open the menu, the first link is *Managing My Jobsite*. This leads to a page with Messer's four operational pillars.
2. **Global navigation:** The links in the desktop site's global navigation are the first set of links in the expanded hamburger menu on mobile.
3. **Utility navigation:** The links in the desktop's utility navigation are the last set of links in the expanded hamburger menu on mobile. Users with access can go to the *Executive Site* and the *Senior Manager Portal.*
4. **Close:** Closing a large menu on mobile can sometimes turn into a guessing game or a round of whack-a-mole. Here, the large green *x* makes closing this menu simple.

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Quicklinks, Mobile

Image 186. Messer Construction Co. Intranet Mobile *Quicklinks*. Users can expand the *Quicklinks* menu to reveal buttons on mobile. *186_Messer_04_Quicklinks_mobile.png*

Quicklinks, Mobile Highlights

Links in the desktop's *Quicklinks* area appear as buttons on mobile.

1. **Buttons:** The links in the expanded *Quicklinks* menu are large and easy to tap. The white text is highly contrasted against the green button color, making it readable.

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SERP

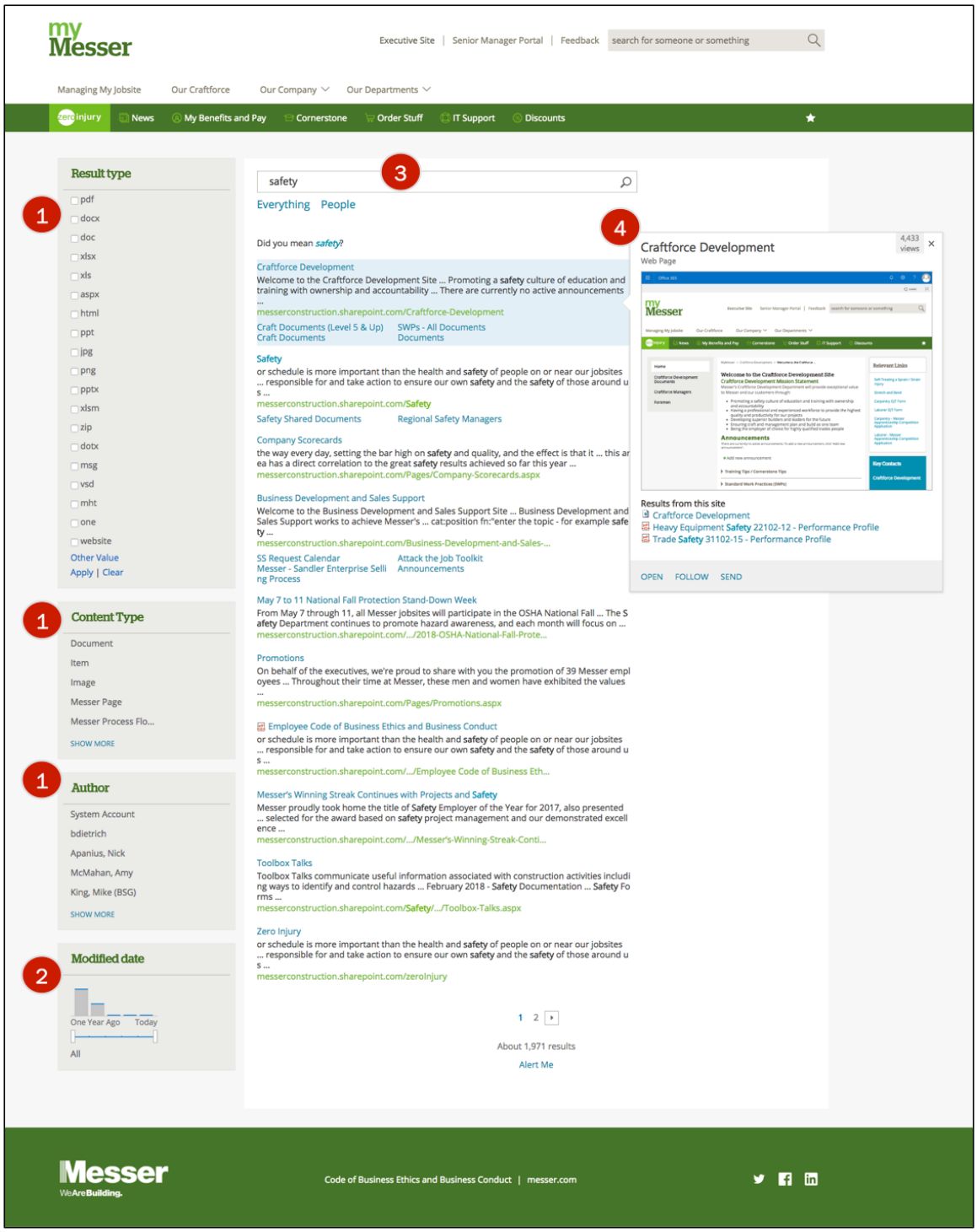


Image 187. Messer Construction Co. Intranet SERP. Filters help employees control their search results. *187_Messer_05_SearchResults.png*

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SERP, Highlights

SharePoint Enterprise search coupled with custom search filtering and refinement features make searching on MyMesser a powerful experience.

1. **Filters:** User can select any, all, or none of the checkboxes in the left section of the SERP, which includes choices for *Result type*, *Content type*, and *Author*. They can also choose to see everything (the default view) or click the *People* link under the search field to see only people related to the search query.
2. **Date:** To choose results within a date range, employees can use the slider feature.
3. **Query:** The SERP shows the search term, reminding users of their query and making it easy to adjust it if need be.
4. **Hover:** Hovering over a result displays a mini-version of the page that the link leads to. Beyond the results itself—with the title, description, type, and source—this mini view of the page not only helps employees decide if the result is the one they want, but it can also give users answers without their needing to leave the SERP. There's great potential for users to find what they want quickly using this SERP.

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Pillars

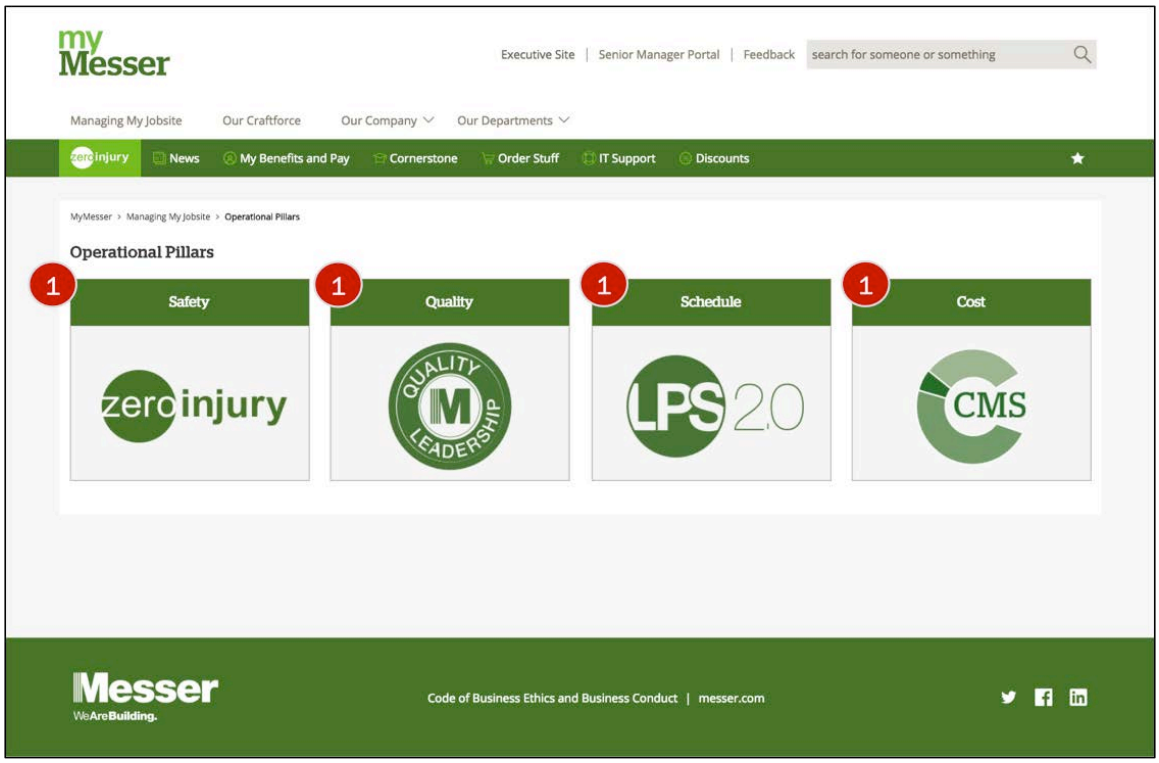


Image 188. Messer Construction Co. Intranet Pillars. This page acts as a great reminder of the company's *Operational Pillars* and provides easy access to information about each. *188_Messer_06_pillars.png*

Pillars, Highlights

The *Managing My jobsite* menu link leads to a page of the company's four operational pillars.

1. **Sections:** The four sections on this page link to tips on *Safety*, *Quality*, *Schedules*, and *Cost*. Safety and quality are the highest priorities at Messer, so they appear first on this page.

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News

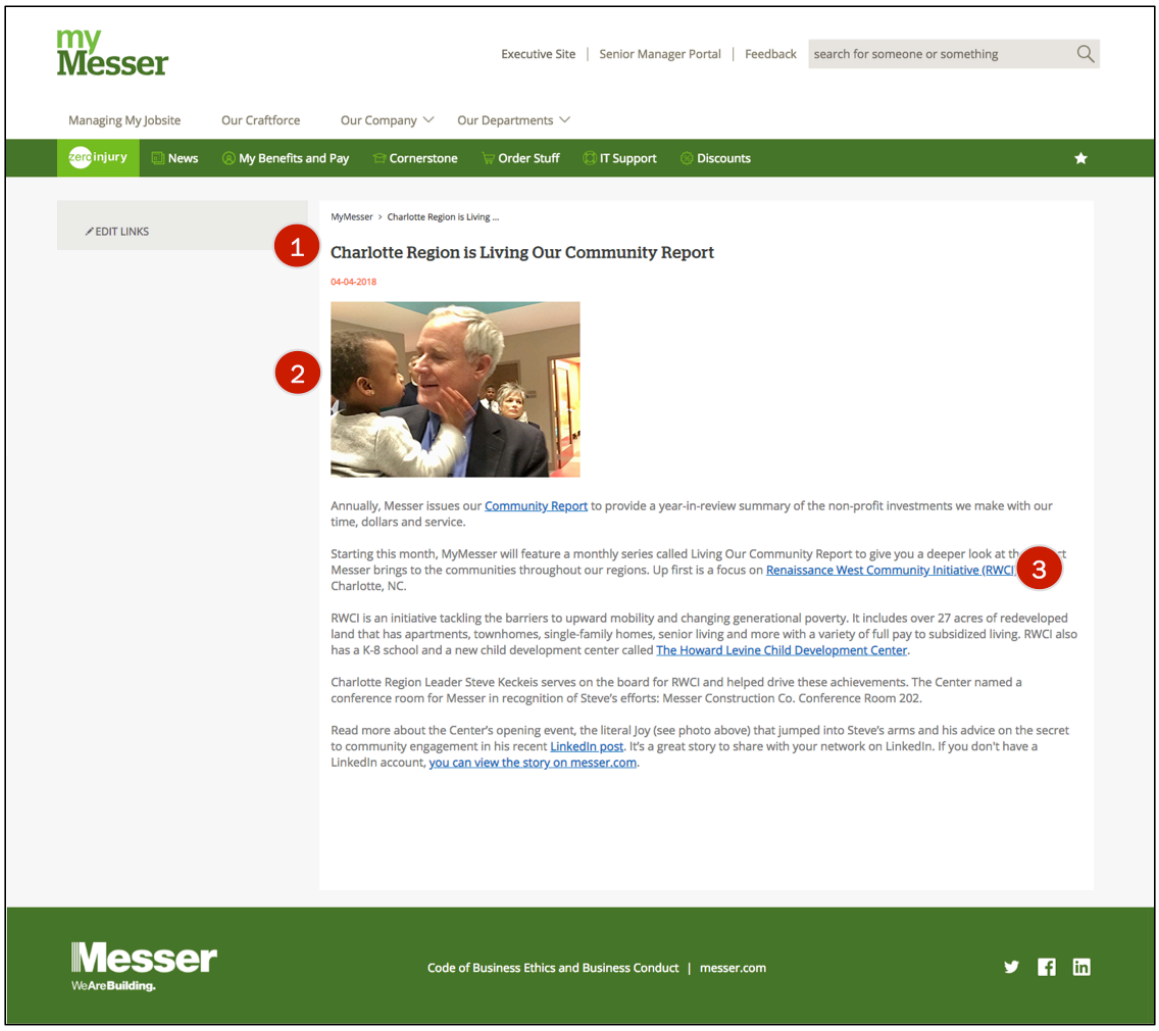


Image 189. Messer Construction Co. Intranet *News*. Inline links in news articles help users find related content. *189_Messer_07_News.png*

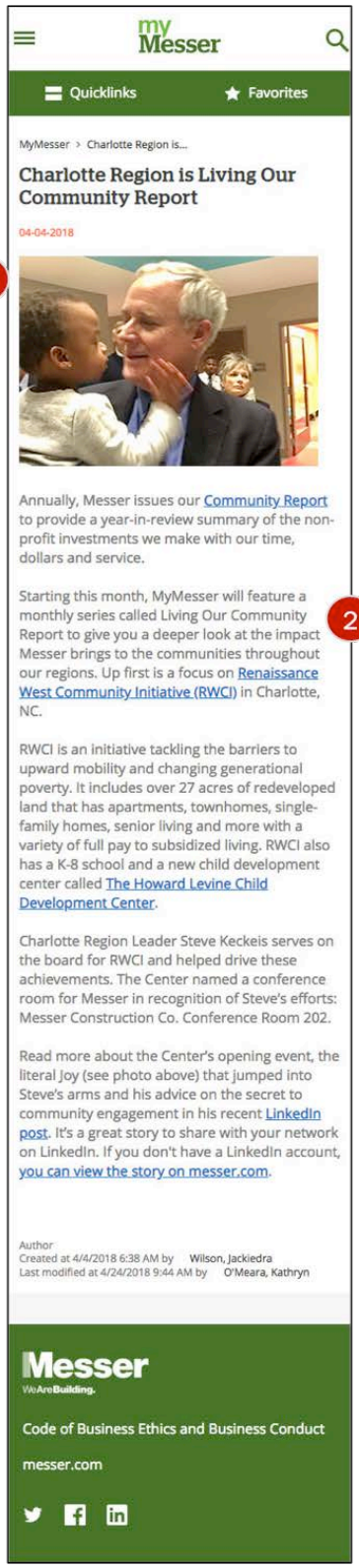
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News, Highlights

News is very popular on MyMesser. Employees are encouraged to suggest news topics, which helps ensure the content interesting and speaks to a wide audience. *News* page views are also boosted by a biweekly newsletter, *In case you missed it*. This includes the news articles, announcements, and social media headlines posted within the past two weeks. The newsletter includes only a few sentences, rather than the full article, but a link to the news story drives readers directly to the article page on MyMesser.

1. **Headline:** The article title is large, clear, and appears at the top of the page.
2. **Photo:** A related image adds a human angle (or some other depth) to the story.
3. **Links:** The blue underlined in-line links are information-bearing words. The style makes them easy to pick out when scanning. The link content helps users decide whether or not they want to click.

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News, Mobile

Image 190. Messer Construction Co. Intranet Mobile *News*. Narrow columns of text in articles are easy to read on mobile devices. *190_Messer_08_News_mobile.png*

Mobile *News* Highlights

The article layout is slightly different on mobile.

1. **Photo:** The photo is resized and smaller on mobile.
2. **Narrow Column:** The narrow column width makes the article text easy to read.

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Process

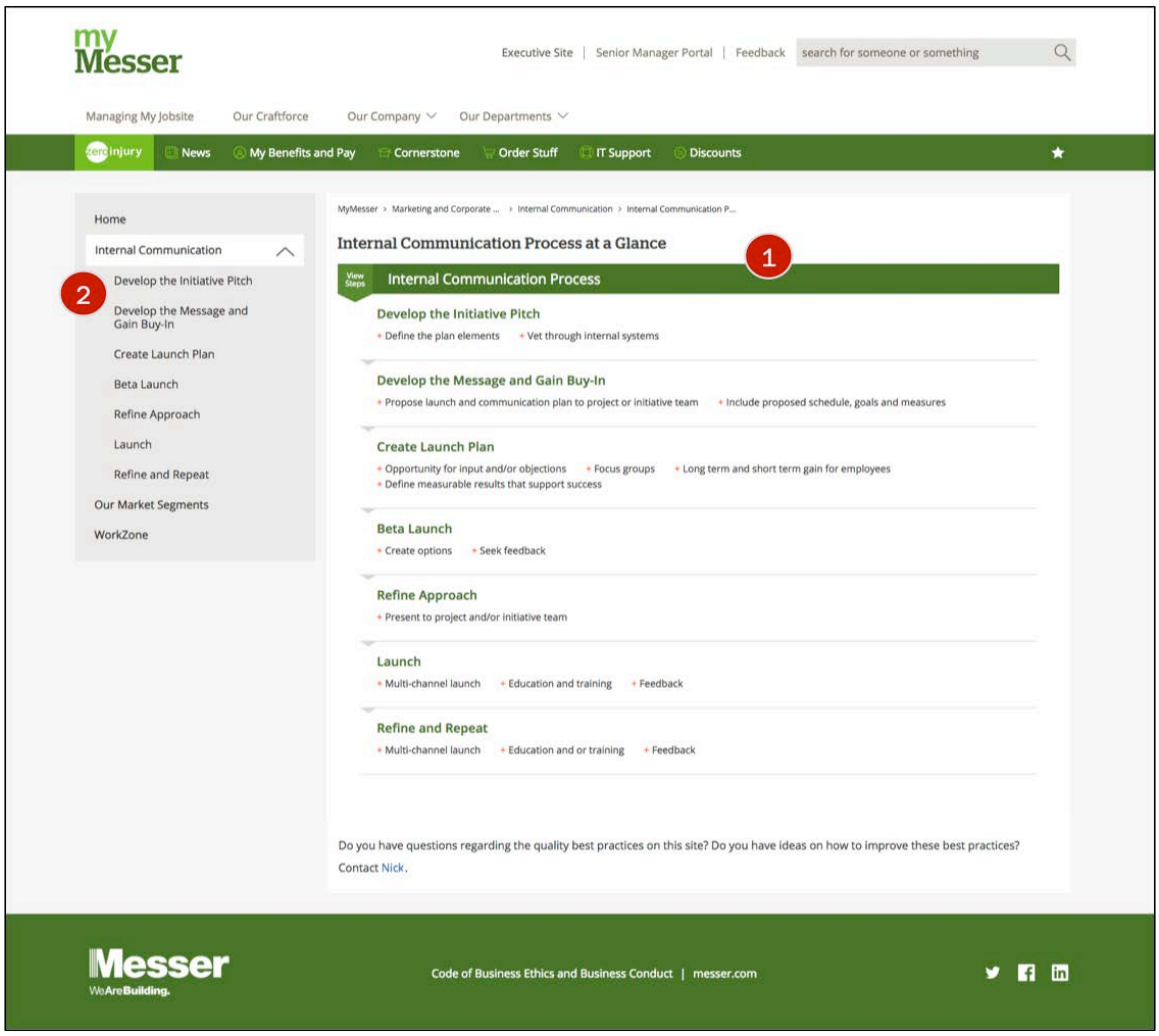


Image 191. Messer Construction Co. Intranet Process Areas. Process areas show an overview of the steps and then provide a menu so users can read the details of each step in the process. *191_Messer_09_Process.png*

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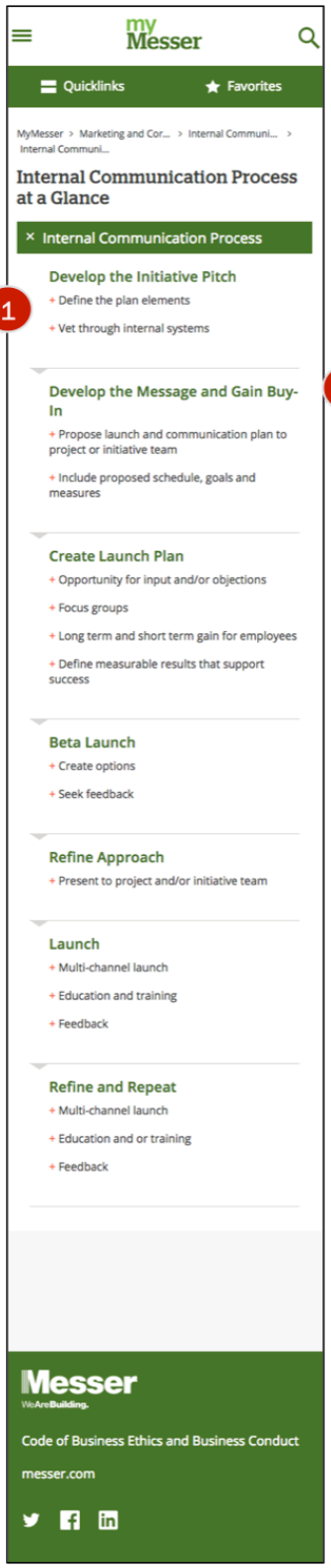
Process, Highlights

Documenting processes at organizations ensures that any employee who needs to know how to do something can find the correct, most recent steps. Process documents increase confidence among employees and consistency across their work. They also help employees cover for each other when someone is out of the office. Finally, they give an overview to employees who might not need the details, but who could benefit from knowing the basic steps involved in getting a task done.

MyMesser includes process documents to make them easily accessible to everyone. The *Internal Communications Process* is one example.

1. **Overview:** Before getting into the nitty gritty, users are offered a page that includes an overview of the process steps. Each step has a title and a few related details.
2. **Menu of steps:** The links in the grey box on the left side of the page display each step as a link. When clicked, the links open the page with the details of the associated step in the process.

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Process, Mobile

Image 192. Messer Construction Co. Intranet Mobile Process Overview. On mobile, the overview shows the steps and a few details, and is arranged vertically to fit the screen. *192_Messer_10_Process_mobile.png*

Process, Mobile Highlights

2

As on the desktop, the mobile screen shows an overview of the process, but the left-side menu was removed due to screen space constraints.

1. **Steps:** Steps and details are easy to read, with dark text on a white background and concise language.
2. **Link:** The green step name is a link that leads to the details page for that step.

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Craftforce Development

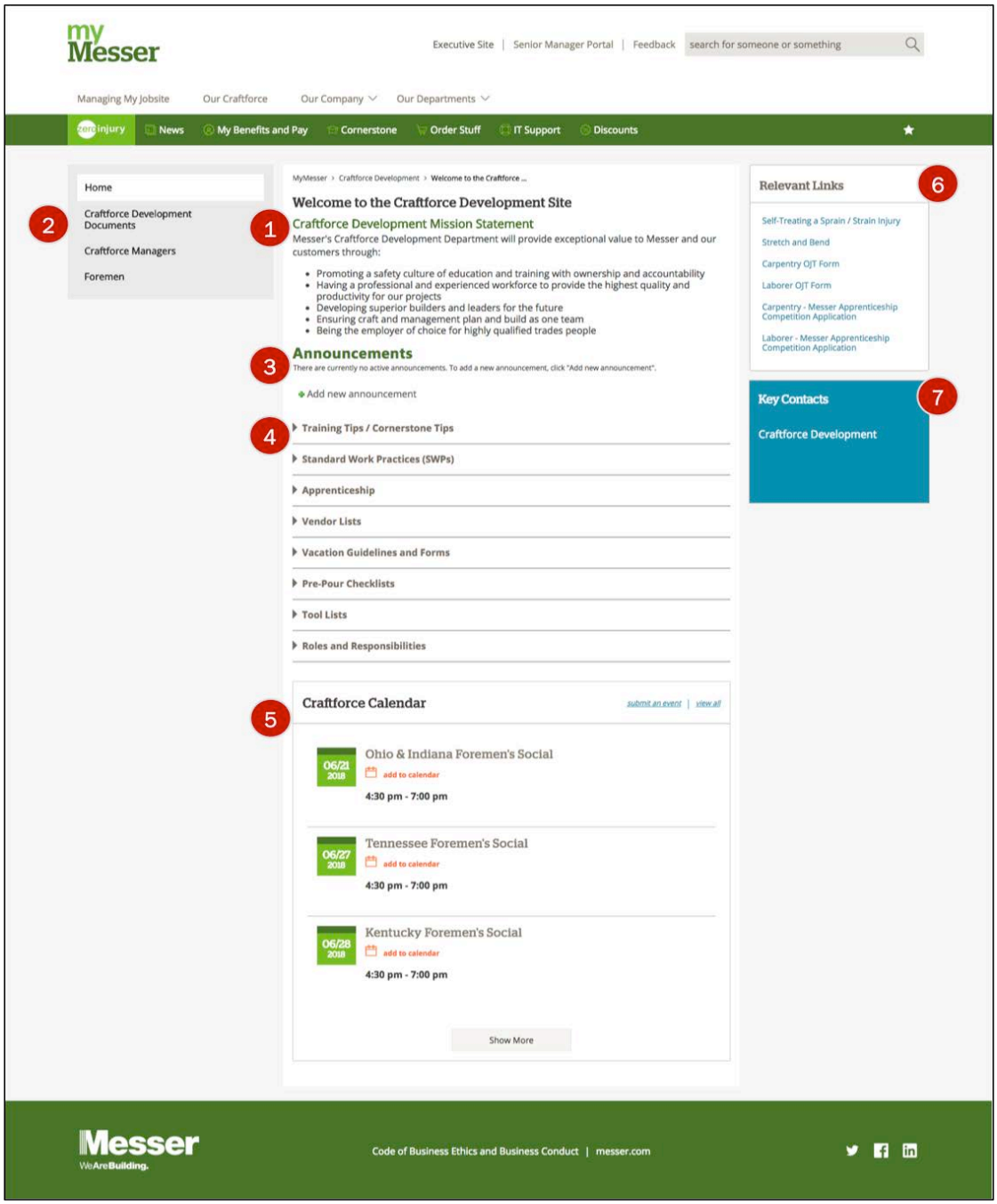


Image 193. Messer Construction Co. Intranet *Craftforce Development*. The company's skilled trade employees, known as the *Craftforce*, have their own special section on MyMesser where they can access pertinent resources and contacts. *193_Messer_11_Craftforce.png*

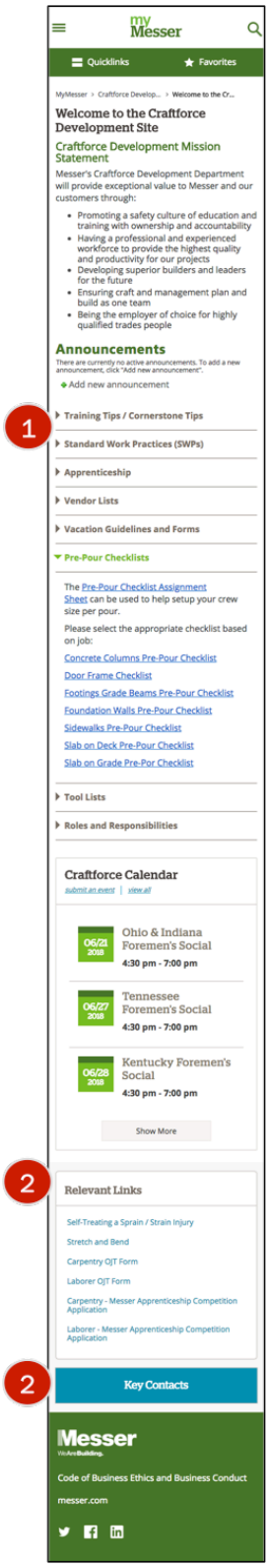
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Craftforce Development, Highlights

While Messer's Craftforce employees can take advantage of much of the information on MyMesser, they especially benefit from the distinct section created for them and related to their work tasks.

1. **Mission:** Employees are reminded of the Messer values, including safety, professionalism, and building craft superiority. The subheading is green and easy to scan to, while bulleted text makes the individual points digestible.
2. **Menu:** The links in the grey menu area on the left lead to development documents and information for managers and foremen.
3. **Announcements:** Users can add announcements of benefit to the Craftforce. This is a great way for craftspeople to keep one another apprised of new developments.
4. **Tips and forms:** The core checklists and resources appear in this section. Here, the Craftforce can find almost any process information in a few clicks.
5. **Calendar:** The calendar lists current events, the date, and the time. Clicking an item leads to the details page. Employees can submit events or view the list of all events.
6. **Additional links:** Other important links that are not part of the core checklists appear in the *Relevant Links* section in the upper right of the page. Here, Craftforce employees can learn about everything from treating their own injuries to upcoming apprenticeship competitions.
7. **Contacts:** The *Key Contacts* section in the right rail leads to that names and contact information of people who can help Craftforce employees with internal processes, working with clients, or emergencies.

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Craftforce Development, Mobile

Image 194. Messer Construction Co. Intranet *Craftforce Development* Mobile View. Craftforce employees work in the field, and they can use their mobile devices to access pertinent resources and contacts. *194_Messer_12_craftforce_mobile.png*

Craftforce Development, Mobile Highlights

It's especially important for Craftforce employees to have access to their MyMesser section via mobile devices.

1. **Tips and forms:** Having processes and forms available on mobile is key for these employees, as they work on job sites. Sections are large and easily tappable. The selected section's title changes from black to green, and the links appear below. Document links are blue and underlined—the most traditional and recognizable signifiers.
2. **Priority:** Except for the left-side menu, all the same elements appear on mobile as appear on desktop. The right rail does a column drop on mobile, as seen here in the *Relevant Links* and *Key Contacts* sections.

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Discounts

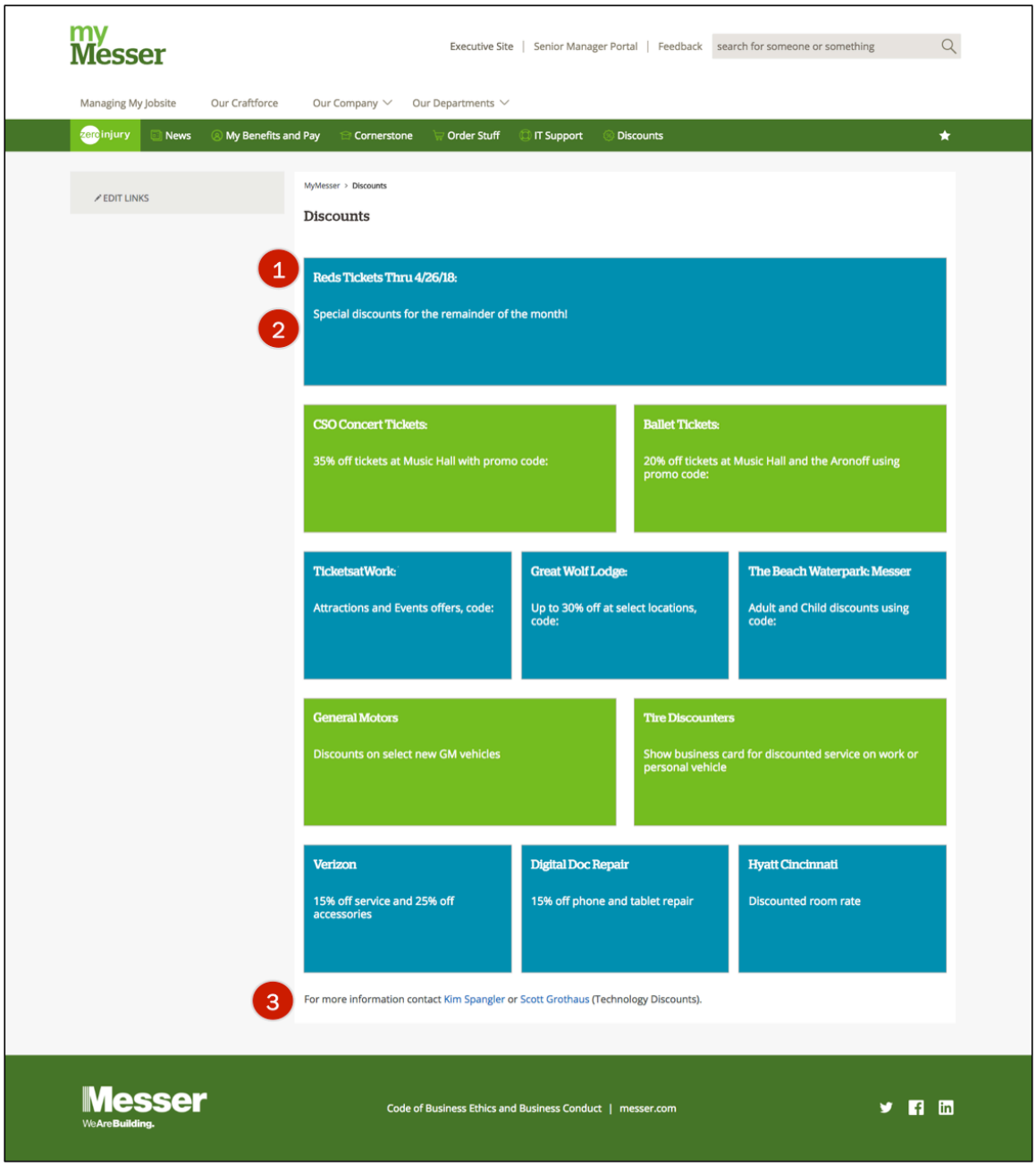


Image 195. Messer Construction Co. Intranet *Discounts*. Discounts are an unexpected employee benefit accessible on MyMesser.
195_Messer_13_discounts.png

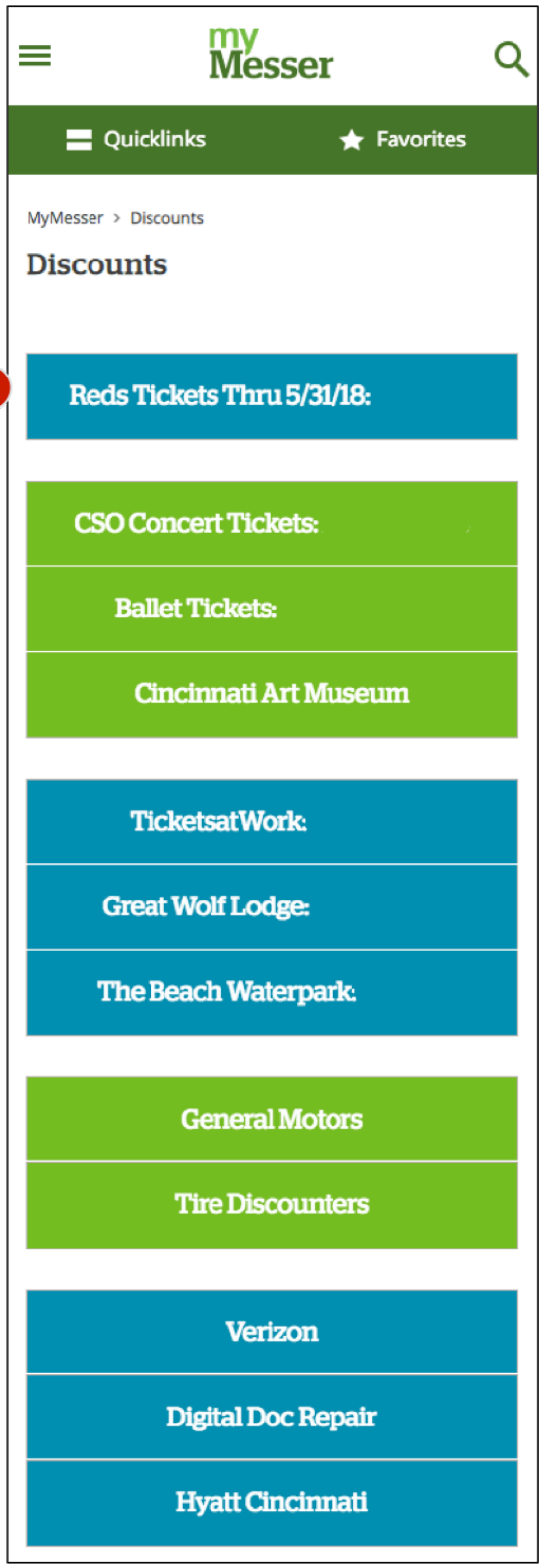
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Discounts, Highlights

Discounts from various companies are a fun, money-saving benefit for employees, with reductions on everything from ballet tickets to automobiles.

1. **Item:** The items employees can buy at a discounted rate each appear in a colored card, with the name of the item at the top.
2. **Description:** The amount of the discount (or whatever information is known) appears in the card below the title.
3. **Contact:** Key contact names appear as links at the bottom of the page in case employees need help with the discounts.

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Discounts, Mobile

Image 196. Messer Construction Co. Intranet *Discounts* Mobile. Employees can view available discounts using their mobile devices. *196_Messer_14_discounts_mobile.png*

Discounts, Mobile Highlights

Discounts are also available on mobile, which is very convenient for employees when they are out shopping or shopping from home.

1. **Discounted items:** The items with discount offers are listed in colored buttons on mobile. The description is not shown due to space constraints.

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Human Resources

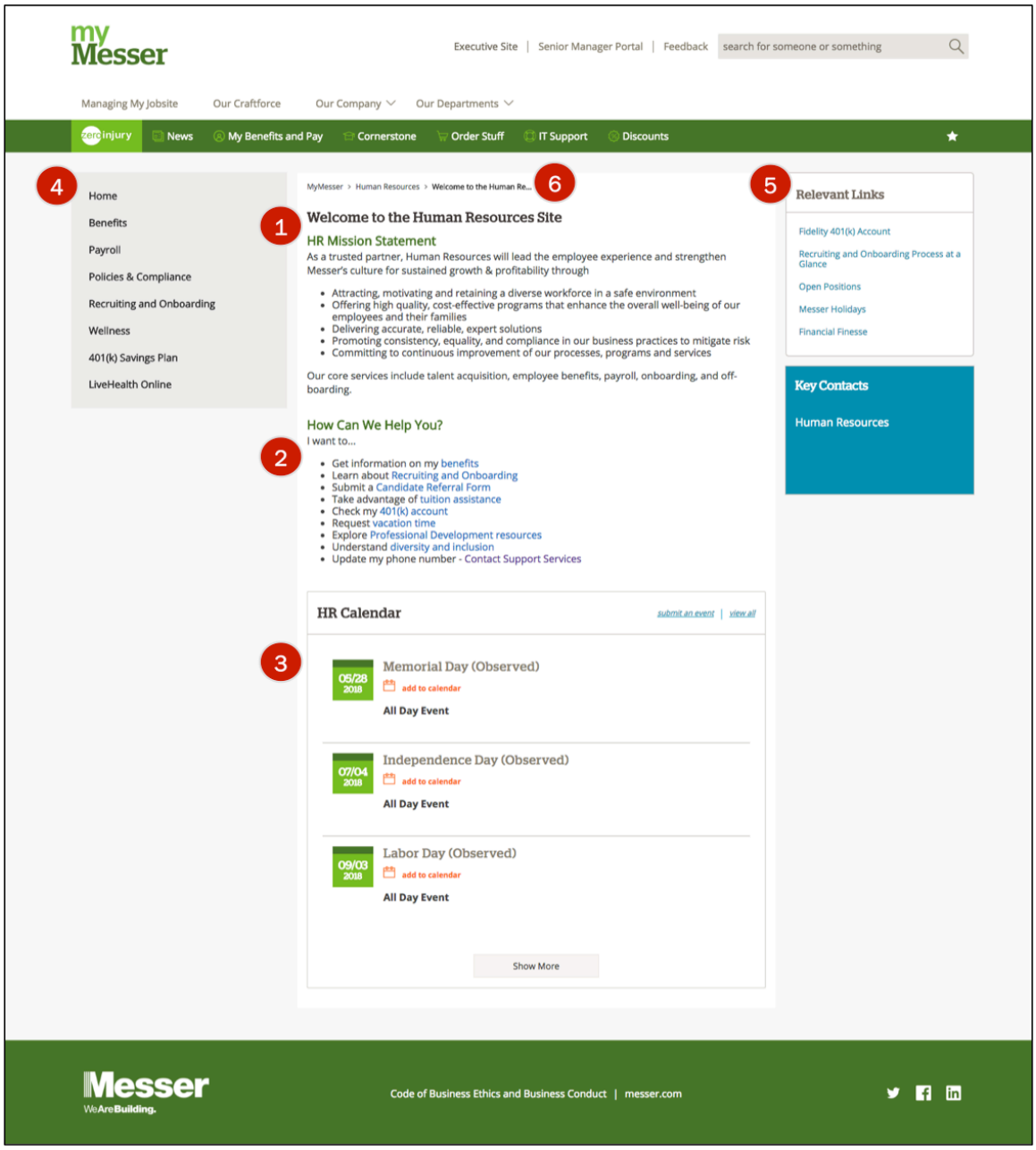


Image 197. Messer Construction Co. Intranet Human Resources. The HR section of MyMesser consolidates information about benefits and much more. *197_Messer_15_DeptHR.png*

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Human Resources, Highlights

Benefits and policies are a staple for most intranets, and MyMesser is no different in that respect. The site boasts a robust HR section. The section's structure follows that of all department pages, which helps users easily locate the same type of information on all department pages.

1. **Mission:** HR's role—including its mission—appears at the top of the HR section page, informing (or reminding) employees what the HR team can do to help them.
2. **Top HR tasks:** Common issues that employees need answers about are listed in the center of the page. Among the links are those related to recruiting, vacation, and benefits to help users serve themselves.
3. **Calendar:** Holidays, which are part of employee benefits, appear in the calendar section at the bottom of the page.
4. **Menu:** The left-side menu links call out the HR area's sections.
5. **Related Links:** The *Related Links* section in the right rail leads to more information; it is one more way the site helps users discover content they might want to explore.
6. **Breadcrumbs:** Aside from the homepage, every page of MyMesser includes breadcrumbs to indicate where the selected page lives in the site structure.

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Marketing

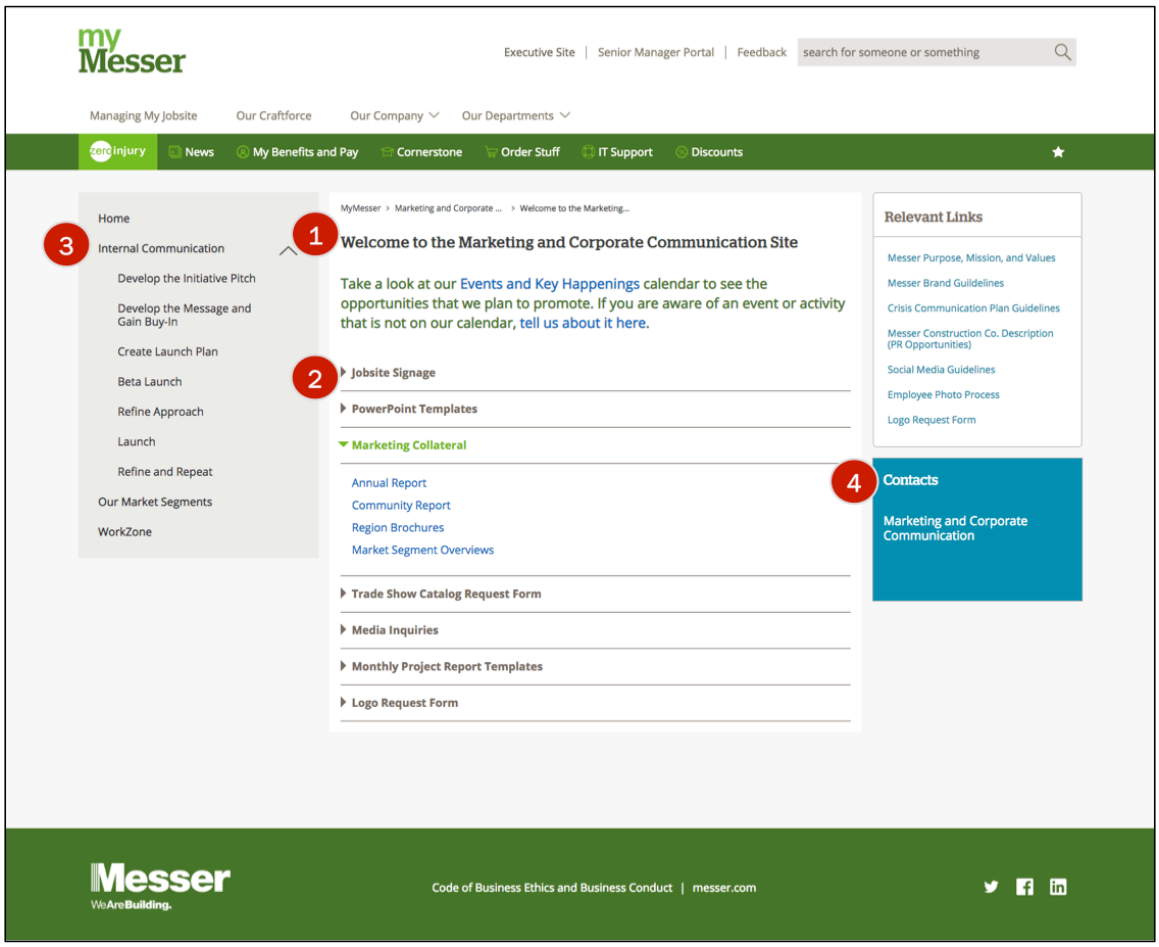


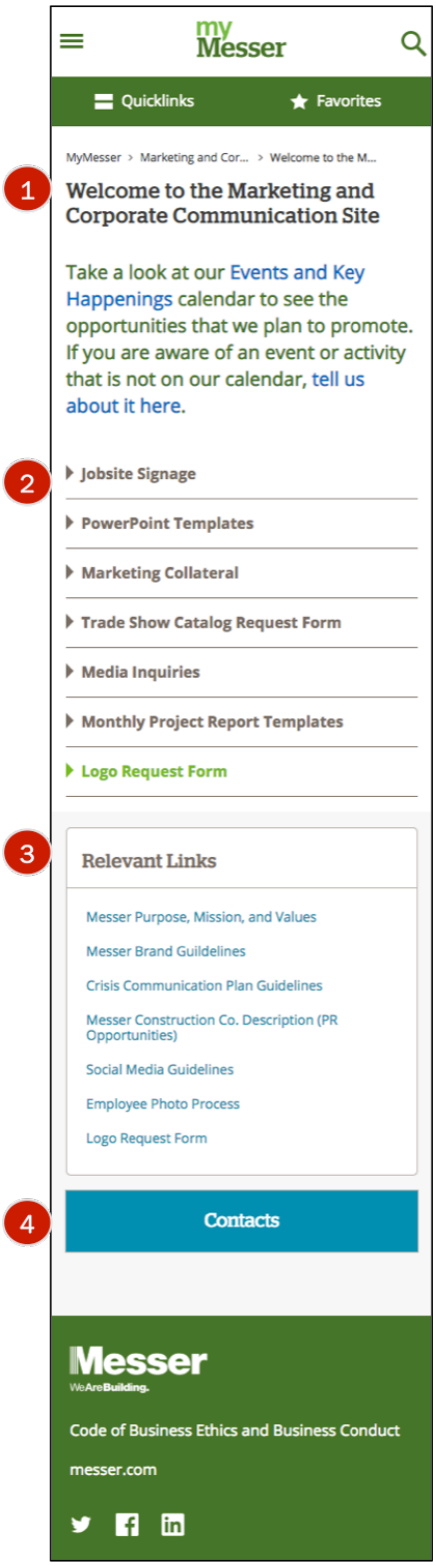
Image 198. Messer Construction Co. Intranet Marketing Department Page. The marketing department's section of MyMesser provides templates, forms, and other resources for and provided by marketing. *198_Messer_16_DeptMarketing.png*

Marketing, Highlights

Like the HR department's main page, the main *Marketing and Corporate Communications* page has an introduction, top areas, and relevant links.

1. **Welcome:** A short statement about the department, complete with inline links to more information, gives a concise department overview.
2. **Links:** More important links are offered as an expandable list, collapsed by default. Each top-level item exposes links to related pages.
3. **Menu:** Task-based menu links appear on the left.
4. **Contacts:** A *Contacts* section at the bottom of the right rail leads to a page about Marketing Department professionals.

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Marketing, Mobile

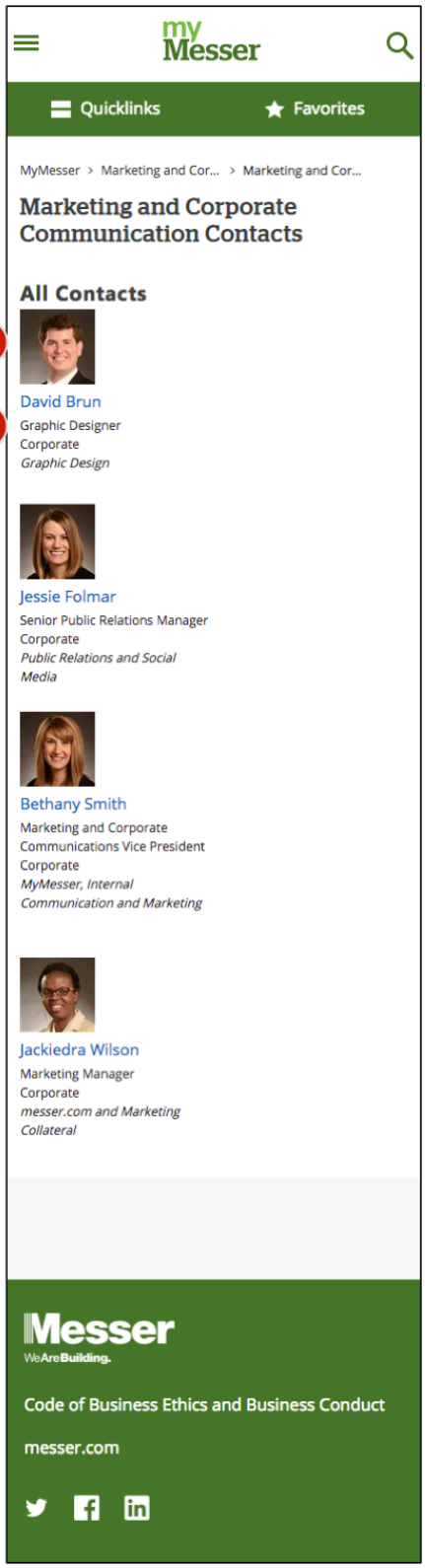
Image 199. Messer Construction Co. Intranet Marketing Department Page Mobile View. The marketing department's section of MyMesser offers the same items on mobile (marketing templates, forms, and resources) as on desktop. *199_Messer_17_DeptMKT_mobile.png*

Marketing, Mobile Highlights

Like the HR department's main page, the marketing main page displays an introduction, top areas, and relevant links.

1. **Welcome:** A short statement about the department is easy to consume on mobile.
2. **Links:** Important links are offered as a list and are easy to read and tap. The links include information and resources for the marketing team, as well as marketing materials for employees in other departments. For example, managers working onsite who need to order signs can do so through *Jobsite Signage*.
3. **Priority:** *Relevant Links* drop from the right rail on desktop to below the top tasks links on mobile.
4. **Contacts:** A *Contacts* button leads to a page of key contacts for the department.

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Department Contacts, Mobile

Image 200. Messer Construction Co. Intranet Department Contacts—Mobile View. Each department lists its key people and contact information.
200_Messer_18_Contacts_mobile.png

Department Contacts, Mobile Highlights

Clicking the *Contacts* button opens a page listing that department's key contacts.

1. **Photo:** A photo of each person helps employees put a name to the face, and vice versa.
2. **Information:** The *Contacts* area includes a photo, name, job title, and department for each person. The name link leads to the person's O365 profile page.

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Department Contacts

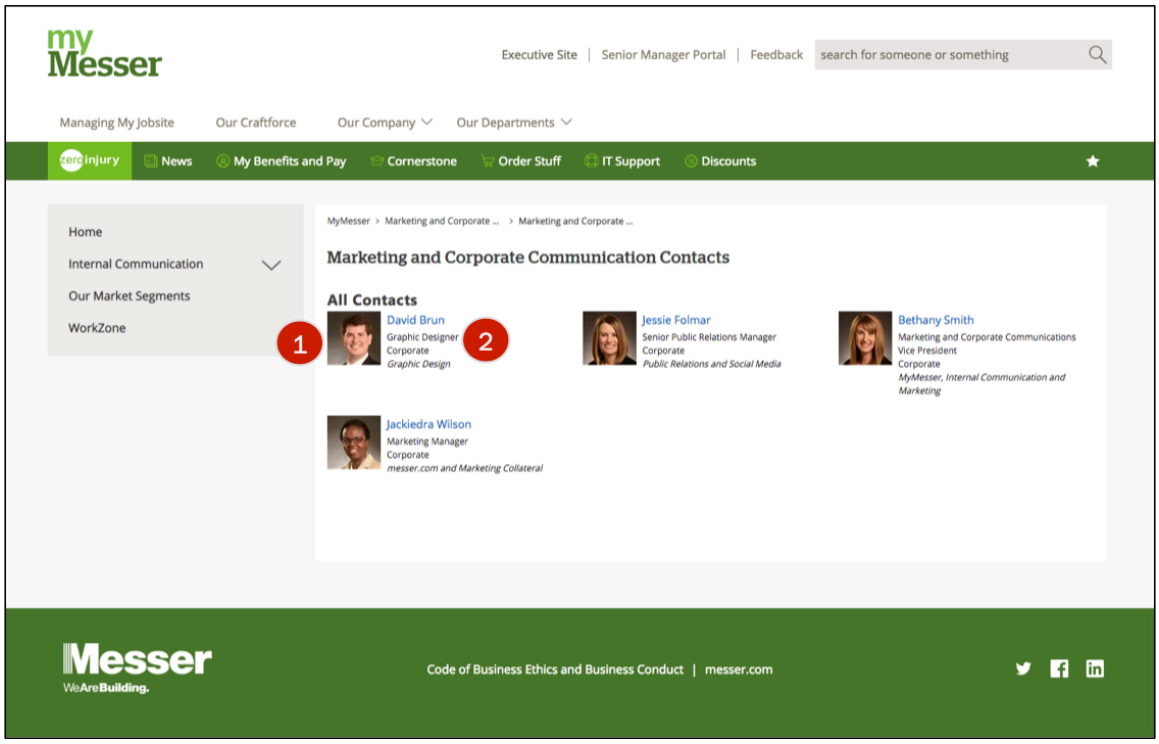


Image 201. Messer Construction Co. Intranet Department Contacts. On desktop, the contacts are listed horizontally. *201_Messer_19_Contacts.png*

Department Contacts, Highlights

Contact pages viewed on desktop use horizontal space on the page.

1. **Photo:** A photo of each person helps employees put a name to the face, and vice versa.
2. **Information:** The contacts area includes each person's photo, name, job title, and department. The name link leads to the person's O365 profile page.

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Region

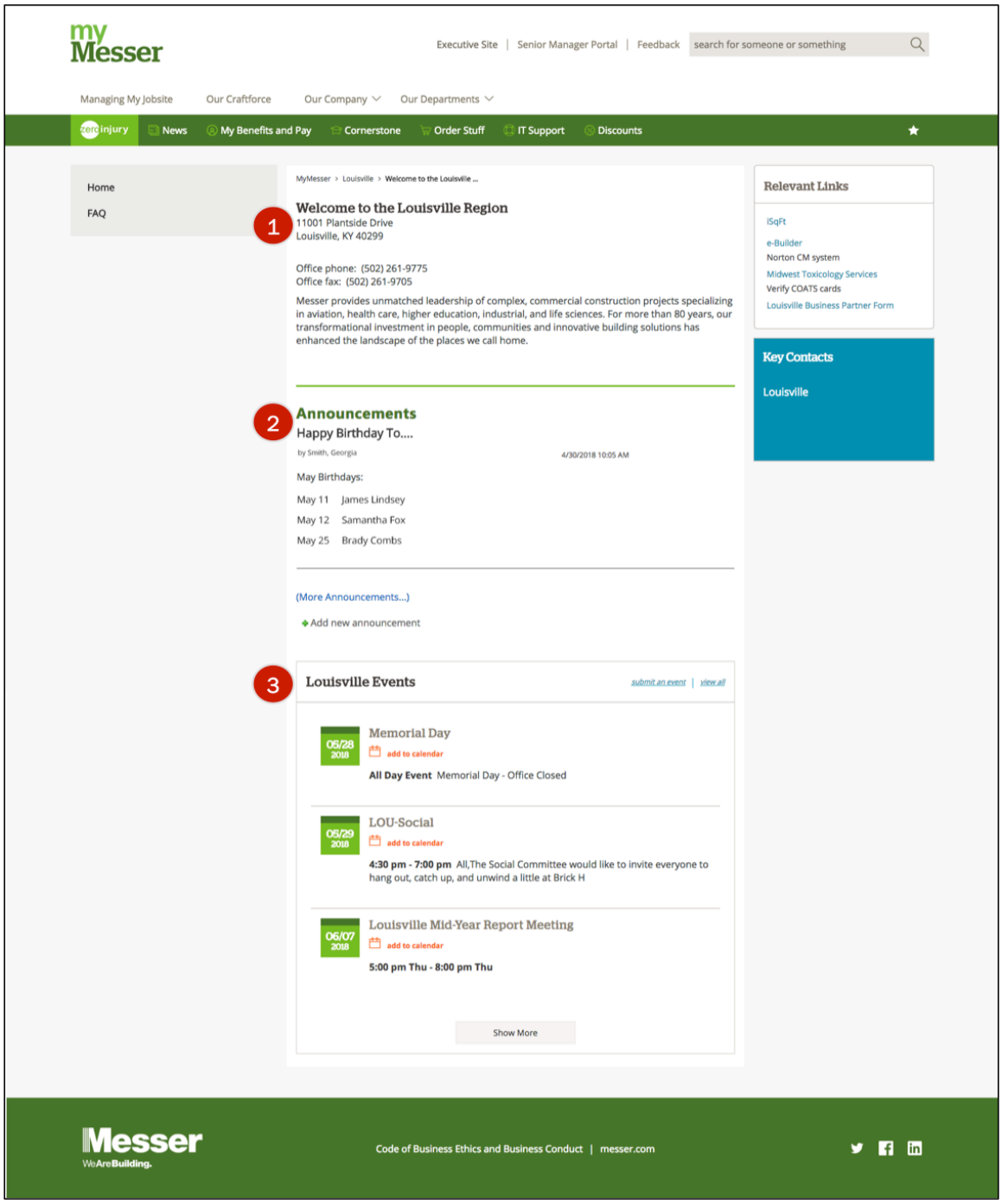


Image 202. Messer Construction Co. Intranet Region Sections. Sections for different regions focus on location-specific events and people. *202_Messer_20_LouisvilleRegion.png*

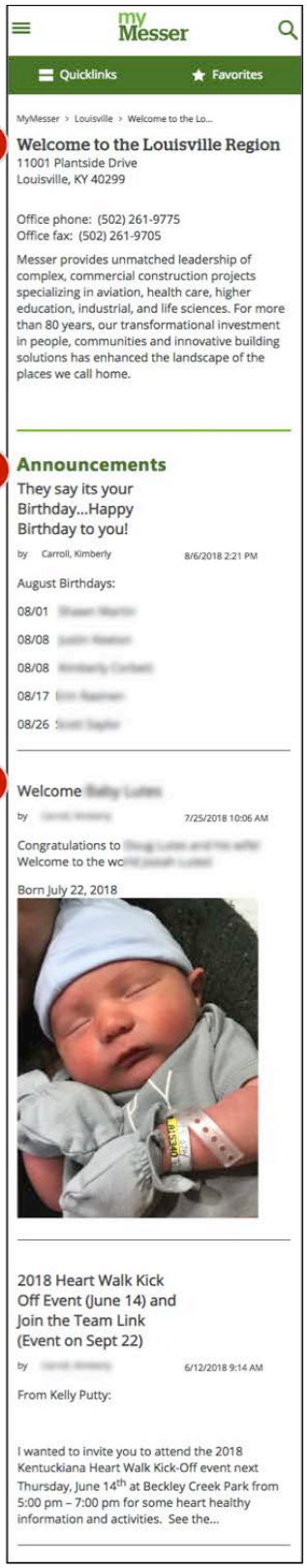
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Region, Highlights

Anyone visiting a different Messer location can go to that region's section of MyMesser for a glimpse into its current events and administrative information. Regional pages follow a layout similar to that of the department pages.

1. **Welcome:** The top section provides the address, phone and fax numbers, and a key sentiment for the region.
2. **Announcements:** Birthdays and other important events for employees at the location are listed for all to see. This is a nice team-building feature.
3. **Events:** Events are listed to bring together the employees from the location. This is a great way to entice employees to participate in events together and bond with one another.

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Region, Mobile

Image 203. Messer Construction Co. Intranet Regions Sections—Mobile View. Sections for different regions are accessible on mobile. *203_Messer_21_LouisvilleRegion_mobile.png*

Region, Mobile Highlights

Travelers to other locations are grateful for the mobile access.

1. **Welcome:** The top section provides the address, along with phone and fax numbers.
2. **Announcements:** Birthdays and other important events are showcased.
3. **Events:** Volunteer events get employees involved in helping the local community. Pertinent info is easy to locate on mobile. Even babies born to employees are announced here, complete with baby photos.

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Events

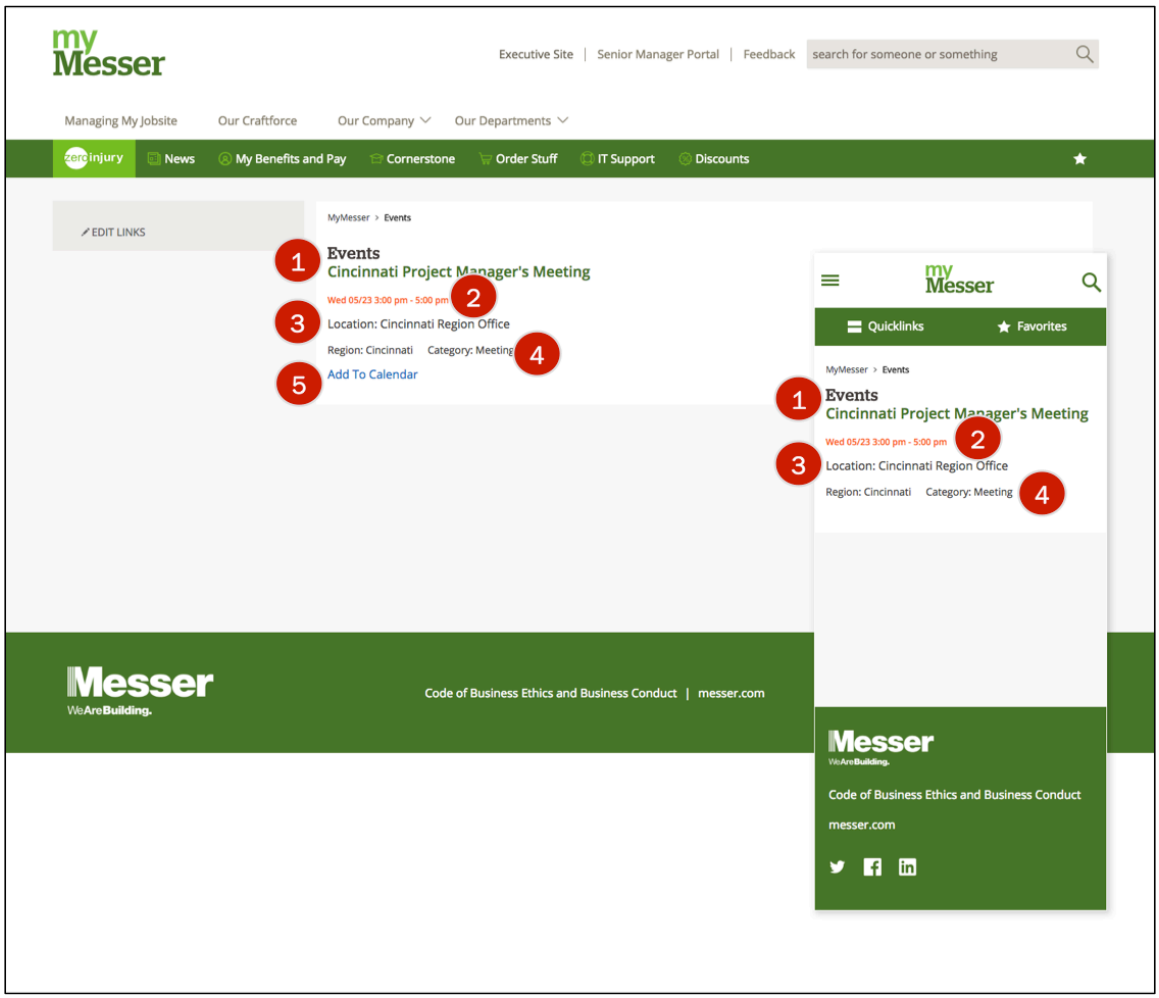


Image 204. Messer Construction Co. Intranet *Events*. Users can easily add events to their personal calendars. *204_Messer_22_Events.png*

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Events, Highlights

Messer encourages employees to spend time together. The events listed on MyMesser help employees find different happenings that they might want to attend. Each event has a page that lists its details, and all of the following are included on both desktop and mobile, except for the final item.

1. **Title:** The event name is listed first.
2. **Time:** The day of the week, date, and time of the event are listed next in red text.
3. **Location:** The location for the event appears in black text.
4. **Category:** For users who search for events by event type, the *Category* assignment may help; it can also help users interested in an event get an idea of what type of event it is.
5. **Add to Calendar:** On desktop, users can click the *Add to Calendar* link at the bottom of the page to add the event to their personal calendar.

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DESIGN PROCESS AND USABILITY WORK

UX Discovery

The design team held a four-week discovery phase in which it conducted UX research and analysis that helped it decide on both the site design and its content; it also helped the team determine a comprehensive set of requirements derived from the needs of both users and stakeholders.

This research fed into the ultimate project goal: to help users find what they are looking for more easily. Discovery activities also helped promote transparency and create buy-in, which ultimately resulted in a high adoption rate for the new, more user-centric intranet.

Research Methods

This initial project phase comprised several research activities, including:

- **Creating a vision:** Cardinal Solutions, the company's agency partner, met with stakeholders to create a *Solution Vision* document. During this session, they discussed the challenges with the legacy intranet and identified specific success criteria for the new site. The *Solution Vision* was referenced throughout the project and served as a tool that the team could return to again and again to keep project goals at the fore as they moved through the design and build phases that followed.
- **Stakeholder focus groups:** The team used conversation-style meetings to help identify usability and UX objectives and rather than focusing on current features or functionality specifically. The main goal of the discussions was to try to understand the culture, business process challenges, and expected project ROI.
- **User interviews:** User interviews were focused on helping the team learn how end users interacted with the legacy intranet, including trying to identify key tasks, motivations, and pain points. The information gleaned from these interviews provided the team with neutral, user-centric data that it used to inform feature preferences, IA, and design decisions throughout the project. This process also paved the way for improved user adoption and helped the intranet fulfill end-user expectations specifically expressed during the interview sessions.
- **User survey:** Surveys are a great way to gain wide exposure for a project with users across a company. The survey the Messer team used focused on the current portal and the systems that users interact with every day. The survey also let Cardinal Solutions reach out to a larger number of users than it had access to in the user interviews.

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- **Card sorting:** Card sorts were used to help evaluate the existing IA's efficacy, as well as to discover specific information that would help the team build a user-friendly, scalable IA for the new intranet. Participants organized physical cards, sorting main, sub, and tertiary topics into categories that they felt would provide an optimal navigation experience. For users who could not participate in person, the team used Optimal Workshop, an online card-sort tool. The results of these sessions translated directly to a site map that illustrated the new intranet's eventual link and page structure.
- **Task prioritization session:** The team also used a collaborative activity to help identify and rank which individual features should take precedence over others. During this activity, each landing page task/feature set was systematically sorted by participants based on perceived usage and the level of importance users ascribed to it. These results provided a roadmap for improving the content hierarchy, as well as the hierarchy of application features, which were collected and delivered using a Task Priority Grid. This provided guidance for the layout and design phase deliverables to come.

Deliverables

Based on the insights gained through the various research activities, the team created a series of deliverables that illustrated project direction, including:

- **Findings:** The team delivered an interview findings report to all stakeholders so they could review the themes that had emerged from the workshops and comment on the proposed IA and content strategy recommendations.
- **Personas:** Personas were created from the information gathered during the user interview sessions. These personas provided (and continue to provide) a deeper understanding of end users, including their desired tasks and frustrations, and offer suggestions for improvement. These personas were used during the redesign, and they will also be used to inform future design decisions as the team continues to make changes and updates to the intranet going forward.
- **Site map:** Based on the card-sort results, Cardinal created a proposed site map, which served as the foundation for the redesigned site and improved IA.
- **Task Priority Diagram:** A Task Priority Diagram was created based on the results of the task priority exercise. It demonstrates how end users prioritize their day-to-day tasks based on frequency and value. These results help define which pieces of the UI should take precedence over others, and pointed to the individual features that should be removed. The diagram was particularly helpful in informing decisions about homepage design and also contributed to decision-making on the overall responsive design approach.

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- **Landing page wireframe:** Using the collective discovery results, a new, low-fidelity blueprint was created to help the team visualize the new and improved UI components and where they would be best placed in specific page areas.
- **Design mockups:** Building on the approved wireframe, the team built a conceptual visual design mockup to showcase the design aesthetic (look and feel). Guided by usability and accessibility best practices, this visual design demonstrated how the Messer brand would be applied and extended to the landing page. Cardinal created a few homepage examples, as well as a collage of specific, consistent design elements that will eventually be part of the new design's pattern library.

Adoption and Buy-In

To gain organizational buy-in for the new site, the team recruited department and region office liaisons to contribute to focus group sessions held during the project kick-off phase. Information gathered from these sessions influenced the site structure, UX, and design throughout the entire project lifecycle. And, as the project neared the launch date, those same participants were brought back in so they could participate again, this time in user testing and design review sessions.

After the new site launched, the team conducted online training sessions and, even today, it continues to have regular check-in meetings with the liaisons to ensure continued adoption and answer questions as they arise.

As these continued efforts show, the team considers buy-in not a one-and-done exercise; it is committed to the intranet's continued growth and success as a comprehensive company tool.

Working with Outside Agencies

The Messer team worked with Cardinal Solutions Group throughout the entire lifecycle of the intranet-redesign project. The agency's participation is outlined in the table that follows:

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CARDINAL SOLUTIONS GROUP	
Role	**Responsibilities**
SharePoint Architect	• Guided all development-related tasks and managed overall direction and health of those activities • Executed stakeholder interviews and discovery sessions to gain insight on business needs and requirements • Developed and guided vision for the overall solution • Architected technical solution • Supported SharePoint-related development and infrastructure activities
SharePoint Developer	• Developed custom functionality and implemented branding under direction of the SharePoint Architect, utilizing Microsoft best practices for SharePoint development • Developed SharePoint page layouts and web parts • Developed SharePoint apps
Business Analyst	• Documented technical requirements • Participated in all stakeholder and requirements sessions • Assisted architect in eliciting and understanding the business needs
Project Manager	• Managed all aspects of project lifecycle delivery, from initiation through close-out and transition • Drove strategic decisions and discussions relating to project priorities • Proactively worked through project issues to mitigate risk • Managed change control process • Managed project schedule and deliverables as outlined in each phase • Led requirements and scope discussions • Reported on project health throughout project

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	• Created and executed change management, training, and communication plans
UX Architect	• Guided the overall effort for all design-related activities • Led stakeholder interviews and focus groups with users to help the team refine the design and content hierarchy • Worked with the UX designer to set a design direction and reviews visual designs
UI Designer	• Worked with the SharePoint designer to design the UI while upholding the brand standard • Applied creative, innovative techniques to help solve problems and craft an engaging interface • Prepared visual assets and developer specifications
Front-End Developer	• Programmed the UI and unique page templates using best-in-class HTML and CSS • Ensured browser compatibility and delivered code to SharePoint developers for back-end integration

GOVERNANCE

Ownership

Intranet ownership is split between the Marketing and Corporate Communications (M&CC) and the IT departments.

This shared ownership model has impacted the site in a positive way. M&CC can schedule stories, share best practices with departments and regions for their dedicated content sections, and use analytics to track and continuously improve visitor engagement. IT works behind the scenes to ensure access and content accuracy and reliability. And these teams work together on overall site governance.

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INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
MyMesser Core Team	• Manage homepage content strategy and messaging
MyMesser Governance Committee	• Clearly define roles and groups for content ownership and publishing
Department Admins	• Manage self-service content for employees and WorkZone usage and adoption
Region Admins	• Manage self-service content and event listings for regional pages and WorkZone usage and adoption

URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	The URL for both the desktop and mobile experience is: www.MesserConstruction.sharepoint.com
Default Status	MyMesser is automatically shown to any Messer employee who logs on with a company device.
Remote Access	The site can be accessed via any web browser (desktop or mobile) with the user's Messer ID and password.
Shared Workstations	iPads and shared workstations are available in many company jobsite trailers and in regional offices to accommodate traveling and Craftforce employees. Every user is assigned a login.

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TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
May–June 2017	• Design and planning
August–October 2017	• Development
October 2017	• User acceptance testing
November 2017	• Training
December 2017	• Launch
Overall redesign timeframe: 5 Months	

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CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Contributors	• The M&CC team meets regularly with the department and region admin leads to identify story opportunities to feature on the homepage. The intranet team writes the content and the SMEs approve it. • Page admin leads and department members manage the content that lives on department pages. • Specific pages devoted to the construction industry's operational best practices are overseen and updated by two of the company's executives.
Contribution	• MyMesser includes a *Submit a Story* option as well as a *Feedback* button to encourage employees to contribute information or insights that can then be shared with the entire company.
Training	• All admins, including department and region admins, received training prior to launch; post-launch, the team holds routine check-in meetings to answer questions and share best practices.
Content Management	• The M&CC team maintains an editorial content calendar to help identify communication opportunities and needs. Admins for pages beyond the homepage are responsible to ensure that their content is useful, informative, accurate, and up-to-date so that users will trust it and continue to want to read it.
Maintaining Quality	• Because the site was designed to optimize UX and make it easy for people to find the information they need and collaborate with others, department pages all have the same look and feel. The team reviews analytics regularly so that it can monitor where people are going and what they are searching for and make changes as needed. The site also invites users to provide feedback via a link on the homepage.

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TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• O365, SharePoint Online
Bug Tracking / Quality Assurance	• Visual Studio Online (VSO)
Design Tools	• InVision • Sketch • Adobe Creative Suite • Optimal Workshop • Pattern Lab
Site Building Tools	• Visual Studio • PowerShell
Content Management Tools	• Layer2
Search	• SharePoint Enterprise Search
Other Functions	• Citrix NetScaler, XenServer

ROI

The success criteria for the new Messer intranet were defined as:

- Improve accessibility and mobility
- Provide better usability
- Improve information finding through search
- Provide in-demand content at the right place and the right time
- Make the intranet the definitive source of truth for the company
- Provide document security

Messer is committed to connecting its employees and driving transparency across all company locations. It rejects the “if you build it they will come” ethos and instead takes an analytical approach to monitoring performance, gauging content traction, and making continuous improvements to the new platform.

Messer continues to work with Cardinal Solutions through a managed service agreement to make continual improvements; for example, it takes the following measures to gauge ongoing performance and user satisfaction:

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- **Measure page views**: The team continues to measure page views so it can understand where users are spending their time on the site and which news stories are generating the most clicks.
- **Monitor engagement:** It's important to monitor engagement of the company's Craftforce employees versus its traditional office staff to ensure the intranet is meeting the needs of both audiences and track whether they're gaining or losing users over time. For example, in June 2018, the intranet had 200 more page views than average each day for the first time since relaunching the site. The increase is attributed to a new biweekly *In case you missed it* email blast that is sent to employees; it provides a round-up of news articles, content, and social media headlines posted on the intranet within the previous two weeks. This email also drives employees to MyMesser to read important company announcements. In the past, the CEO would have emailed this company information to all employees. Now, the CEO still emails employees, but instead of including the full message in the email, readers receive two- to three-sentence messages that direct them to *read more* via a hyperlink to the story page on MyMesser that contains the full announcement.

LESSONS LEARNED

Messer Construction Co., like many companies, chose to work closely with an agency partner throughout its intranet-redesign project. Although that partnership's success shows in the pages of its new intranet design, such good outcomes can make a hard job look deceptively easy. However, it's not always easy to choose a great agency—and it's even harder to make the collaboration work smoothly. Messer scored high on both these points, and its team has lessons to share with other companies considering this type of approach:

- **Choose agency partners with care.** "We learned early on that having a partner that simply understood SharePoint was not enough. We needed a partner that could help us as an organization connect with our users to understand their perspective on what a new employee portal could do to help them stay better informed and do their jobs more efficiently and effectively. Cardinal brought a unique combination of user experience skills along with deep technical expertise that allowed us to understand the needs and wants of our employees, and then determine the best technical approach to deliver what they needed. Starting with user experience activities such as focus groups, stakeholder interviews, card sorts, and task priority exercises provided our employees the opportunity for their voices to be heard, while also aligning what the business stakeholders hoped to accomplish with the new portal."

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- **UX acumen is just as important as technical expertise.** “Much like the lesson learned above, we would recommend engaging a partner like Cardinal Solutions that not only understands the technical aspects of architecting an employee portal but also has the requisite user experience capabilities to truly drive out what employees need and want. The discovery and planning activities that Cardinal led at the project’s inception truly established a foundation for our future employee portal because it incorporated the voice of the end user. The IA, content strategy, key web parts, etc. were established through a highly collaborative process with both end users and stakeholders. The approach Cardinal utilized ensured that we would build a new experience that our employees would need and want to use while also satisfying the goals and expectations of the business sponsors.”

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Norwegian Government Security and Service Organization (Departementenes sikkerhets- og serviceorganisasjon [DSS])

OVERVIEW

COMPANY

The Norwegian Government Security and Service Organization (Departementenes sikkerhets- og serviceorganisasjonm, or *DSS*) provides shared services to the central government in Norway, including the Prime Minister's Office, 15 ministries and embassies, and consulates, as part of the Ministry of Foreign Affairs (MFA).

The main purpose of DSS is to provide synergy for the ministries with cost-effective and reliable shared services, which include cleaning, security, switchboard, and postal services, as well as running computer systems and handling government publications.

The *Department of Digital Services* web section provides web services to the ministries, mainly providing support for the external website www.regjeringen.no (government.no), the norway.no portal for MFA, and a number of smaller sites, along with the intranet platform.

Headquarters: Oslo, Norway

Company locations: DSS (750 employees) and most ministry employees (5,200) are based in Oslo. Roughly 1,800 employees are located in about 85 other countries worldwide (in 110 embassies and consulates).

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

Annual revenue: N/A

THE INTRANET

Users: Approximately 7,500 Depweb/common platform users, of whom 6,700 also have access to a ministry-specific intranet.

Mobile approach: Responsive web design, secure/encrypted access

Technology platform: EPiserver CMS 11 (intranet); SharePoint 2013 (search and collaboration)

TEAM

The platform was designed and implemented—and is continuously maintained and enhanced by—a flexible group of internal and external resources.

In-house team: The internal team handled project management, concept design, UX, IA, tech supervision, dialogue with intranet editors, user research, search, and visual design. Team members: Hilde Kari Sundet (project lead), Petter Thorsrud, Torbjørn Vagstein, Stig Nappen, Shanmugathas Asaipplillai, Mette Haga Nielsen, Kristine Brodahl, Rune Løvnæseth, David Rooke.

External resources: External resources were used for interaction design, UX, visual design, EPiServer CMS, and SharePoint search implementation. These included consultants from: Creuna, EpiNova, and PuzzlePart: Ingrid Håland, Stig Kulvedrøsten, Vidar Olsen, Martin Falck-Ytter, Carl Lundblad, Bjørn Tennøe.

Ministry representatives: In addition to the project/team members, the involvement of the ministries' intranet editors has been (and still is) crucial to the platform's development, maintenance, user support, and further development.

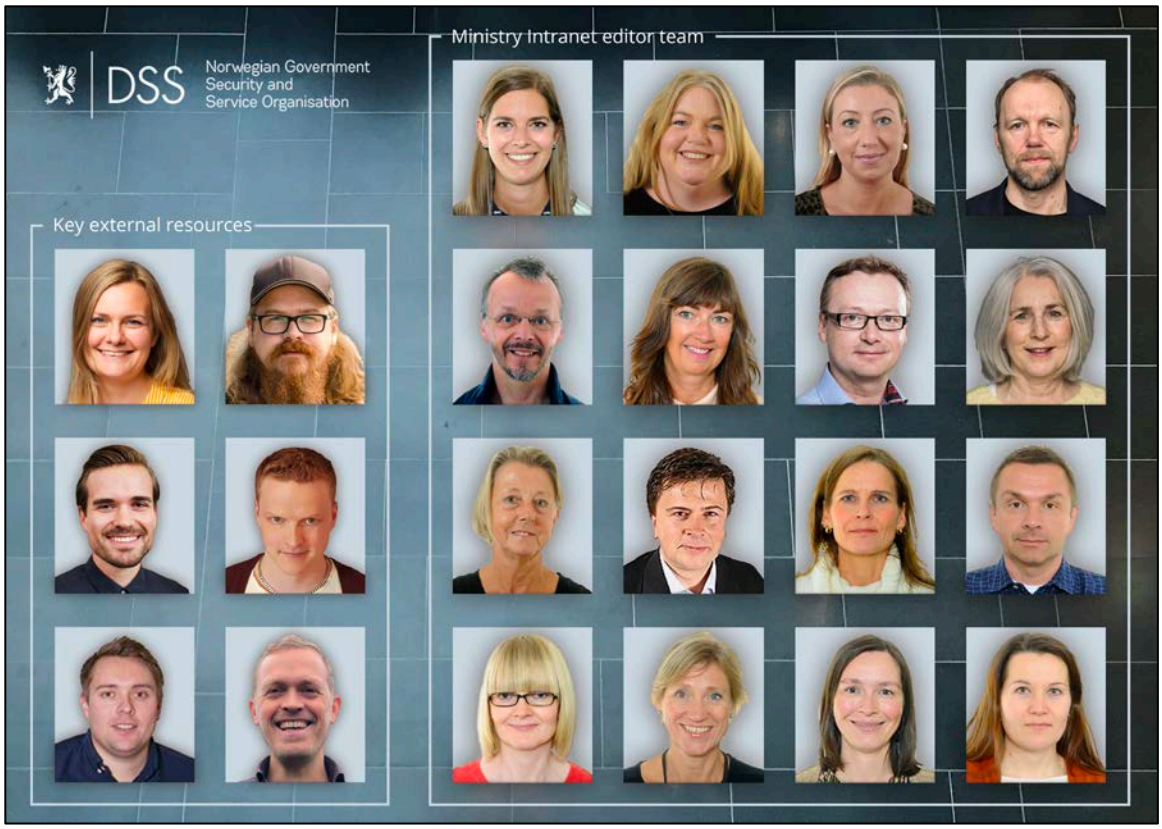
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INTRANET TEAM



Core team members shown here (back row, left to right): Torbjørn Vagstein, Stig Nappen, Mette Haga Nielsen, Rune Løvnæseth, Shanmugathas Asaipplillai; (front row, left to right): Kristine Brodahl, David Rooke, Hilde Kari Sundet, Petter Thorsrud.

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Key external resources shown here (**left grid**, top row, left to right): Ingrid Håland, Vidar Olsen; (second row, left to right): Martin Falck-Ytter, Carl Lundblad; (bottom row, left to right): Stig Kulvedrøsten, Bjørn Tennøe.

Ministry intranet editors shown here (**right grid**, top row, left to right): Silje Lindebrekke, Gunn-Åse Kyrvestad, Ajfer Husejin, Guttorm Aanes; (second row, left to right): Finn Mølmen, Eline Bjerke, Rune Akselsen, Ellen Brit Sekkelsten; (third row, left to right): Marta Haga, Tor Martin Bærum, Anita Sletten, Øyvind Sæther; (bottom row, left to right): Åshild Sæther, Liv Nodeland, Hilde Marie Høberg, Nina Ludvigsen.

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HIGHLIGHTS ABOUT THIS WINNER

The Norwegian Government Security and Service Organization (DSS) intranet designers were resourceful in the way they peppered personalization features throughout the design of this intranet platform. Rather than personalize in basic, traditional ways, their decisions were driven by thorough user research and obvious deep thinking. This, combined with a common design platform and search experience, and countless smart touches, created an inspiring design.

- **Common design system:** A design system unifies 7,500 users, 15 ministries, and the Norwegian Office of the Prime Minister on one intranet platform. Thoroughly usability tested, the platform reuses visual design, interaction design, and technical components. Design guidelines support all intranet efforts. This consistent design creates unity, steadiness of use, and time savings for users and intranet teams.
- **Menu to the digital workplace:** A waffle menu in the upper right gives employees access to applications beyond the intranets that make up the DSS digital workplace.
- **Common linked content:** Articles produced on Depweb (the main common intranet) can be shared and added on ministry intranets. Those intranets can also add ministry-related content above or below the shared content. If the source articles change, the linked pages on the ministry intranets automatically update, without affecting the customized ministry-specific content. This is an innovative way to share content and allow for customization, while also ensuring information accuracy.
- **Links to important pages and tools:** Sections for tools and bookmarks—some offered by default, and others customized by users—help employees find the tools and information they need.
- **Consistent search experience:** A common global search crawls the many intranets, an extranet, and SharePoint resources. Thus, no matter which intranet the user searches from, the search will return results regardless of which source the content is hosted on. SERPS offer filtering capabilities and source tabs to expedite the search, focusing it in on the best results.
- **User-targeted search:** Search is targeted to the logged-in user, and cuts through the junk. For example, suggested search results are based on the query's relevance to the logged-in user. Similarly, when an employee searches for people, the closer in organizational proximity each result is to the user, the higher that result will appear.

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- **Clickable search metadata:** The team also went an extra few miles to create clickable metadata on SERPs. If the results aren't what users need, they may see a related item—such as a department link—and can click on that right on the SERP. Instant related query anyone? Similarly, document previews allow employees to get a better sense of the result, and they can follow or share the document without ever leaving the SERP.
- **System status:** The homepage displays information about and the status of key DSS systems. This prevents a lot of wasted time and effort trying to determine if a system is having an issue and then attempting to report it.
- **Notify author:** A simple form lets users notify an article's author of any issues with it. Further, social commenting and liking features provide an outlet for employees to engage with one another about articles.
- **Multi-language support:** The platform provides support for multi-language intranets, letting users easily switch languages with a simple toggle icon. The Ministry of Foreign Affairs (MFA) in particular has exploited this opportunity because of its large proportion of English-speaking employees in embassies and consulates.
- **Forms with built-in workflow:** The system eliminates busy work and possible user error with niceties such as having form fields prepopulate with user data. Further, built-in workflows automatically route information to the right people at the right time. For example, when an employee signs up for a training course, the system auto-generates and sends an email and a text confirmation, as well as later reminders. The training instructors track the people who have signed up and can manage communication with attendees.

BACKGROUND

The first common intranet platform for the ministries was launched in 2007, as a direct result of a major upgrade to the Norwegian Government's external website (www.regjeringen.no/www.government.no), which united the many ministries under one public platform.

Prior to this, there were 15+ unique ministry intranets with more than half a dozen different technologies and platforms, each "owned" by the respective ministry's ICT department. However, because the ministries were experiencing increasing costs and upgrade issues, they were open to seeking common solutions. This coincided with a need to reduce local ICT staff and use DSS services to strengthen its position as the leading supplier of services to the ministries. DSS is a public agency; although it is owned by one ministry, it offers services to all ministries.

The experiences from the *regjeringen.no* project clearly indicated that offering a single platform to all ministries offered many potential benefits, and it was natural to try to leverage the external site's technology solutions. DSS has therefore sought to standardize both the technical platform and its use of suppliers for all web solutions

and services offered to the ministries. This helps DSS reuse solutions and optimize resources and competencies.

The intranet's previous version had common functionality and design guidelines, but each intranet was hosted as a separate instance, necessitating the need for separate servers and licenses for the CMS and search engine, and in some cases, local hosting inside a specific ministry's firewall.

Since its origin in 2007, the intranet's goal has always been twofold:

- Help employees find relevant information and tools to do their jobs efficiently
- Offer news, background information, and socially-oriented content to help foster a common culture and a good working environment

The new platform is hosted as one instance, which results in savings on licensing, hosting, development, and maintenance. It also allows for central editorial and tech support, common guidelines and page templates, and the ability to share and localize common content on local intranets. This greatly simplifies intranet editors' work, as they can now concentrate on creating content and satisfying users' needs.

The most recent platform upgrade includes new visual and interaction design, new navigation and search, and enhanced functionality. Extensive user research and user testing indicates that user needs have been well taken care of with these many changes and enhancements.

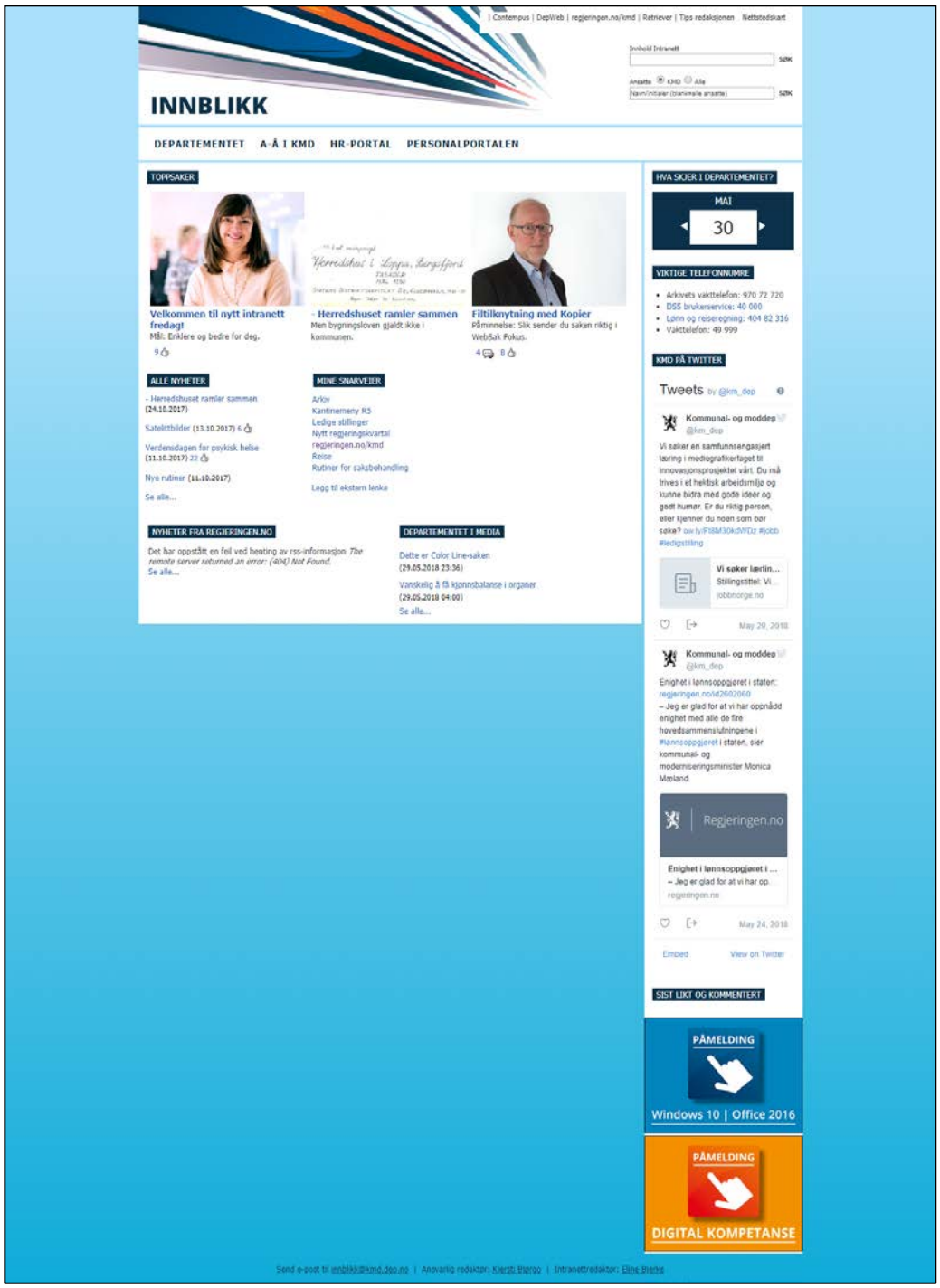


Image 205. Norwegian Government Previous Intranet Homepage. The old platform was less coherent, as fewer elements were shared between various ministry intranets. *205_GovNO_01_OldPlatform_homepage_version2.png*

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Challenges

The team encountered many challenges in undertaking a project of this size and complexity, including:

- **Meeting everyone's needs:** Unifying the requirements and priorities of 15 different ministries into a single coherent platform was the project's single biggest challenge. Originally slated for release in late 2016, the project launch was delayed for two main reasons:
  - The platform architecture was redesigned to offer one centrally hosted application, with content sharing and reuse of a common search. This led to several challenges, including the need to solve access rights and network/firewall challenges, as well as to agree on common content and metadata models.
  - During the development process, additional user needs were identified and met, leading to scope creep, delays, and budget problems.
- **Creating an all-encompassing search:** Early in the process, the team decided that rather than set up an intranet-specific search, it would create the first iteration of an enterprise search covering all important sources, including SharePoint resources and document management and archiving systems. The first version of this search covers all content on the intranet and (common) SharePoint platforms with rights management; it is designed to include document management systems' content and other sources at a later stage. Aiming to create a system that would index and search SharePoint resources meant that the teams responsible for SharePoint functionality, UX, and local SharePoint hosting and maintenance had to be consulted and included in the project. In the long run, this proved useful for all teams, but getting there took time.
- **Deciding what to do about specialized functionality:** The previous platform had a lot of specialized functionality that had been developed over the years. The intranet project was originally intended to remove some specialized functions, but the opposite actually happened. Almost all special functions had to be reimplemented on the new technical platform, and new functionality was also added, including prefilled forms (with personal and organizational info) for ordering services, a new course portal, and a module for producing HTML documentation from Microsoft Word files.

- **Creating a common platform:** From the beginning, two different projects were defined. One project was to renew Depweb (*Ministry-web*), the common site for information concerning all ministries and DSS services to ministries. This site was primarily produced and published by DSS. DepWeb was also the platform to describe and offer DSS services to the ministries. The other project was aimed at intranet solutions; it was not originally intended to cover Depweb but, during the project, it was decided that a single common platform would be an obvious and better solution. As a result, some early insight and analysis work had to be coordinated and agreed upon, which was demanding and very fruitful.
- **Creating a gateway to information sources:** Another challenge was to decide where to store and how to present various information resources. In early 2015, DSS introduced a set of collaboration tools based on SharePoint 2013, and a lot of "permanent" information and documentation (that did not need dynamic editing) was published as PDFs or Word files in SharePoint rooms or on the wiki platform. This caused problems for users who needed that information, as it was difficult to find and metadata and title conventions were not adequately developed. The intranet team initially had little contact with the SharePoint team. As the project progressed, however, the teams began cooperating and seeking common solutions. To reduce the issues with finding information, a waffle menu was introduced to present shortcuts between all available sources and design changes were made to the search experience. These solutions have greatly reduced the problems, but people can still get confused by the multitude of sources and applications.

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DESIGN REVIEW

Platform

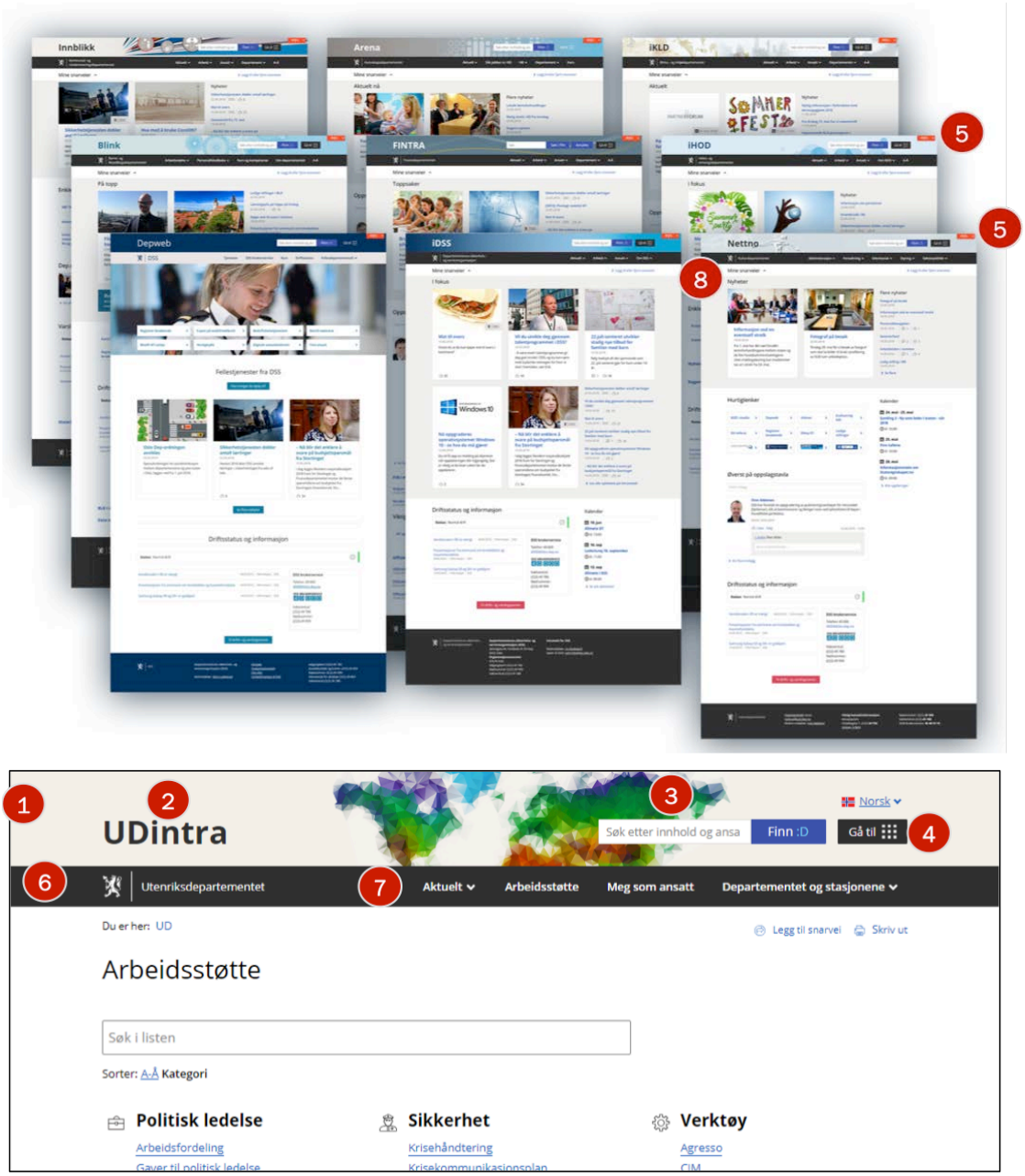


Image 206. Norwegian Government Intranet Platform. All ministry intranets and common intranet/extranets have similar structures. *206_GovNO_02_CollageHome_Live.png (top) and 210_GovNO_06_tools_Live.png (bottom)*

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Platform, Highlights

The DSS intranet platform is not just one intranet; it is a framework for and network of multiple intranets. This system comprises 15 sites. In addition to organization-specific intranets for each of the 13 ministries, plus one for the Norwegian Government Security and Service Organization (DSS), which provides services to the ministries, such as: security, cleaning, ICT, and information services. Depweb acts as the overarching common intranet/extranet for all ministries and includes topic-specific subsites that provide information from one ministry to all ministries; examples include subsites such as one about a common ICT project and one about the planning of new government buildings following the terror attack on July 22, 2011.

Page templates, navigation models, and design guidelines ensure that most pages across the intranets are similar in structure and appearance. This consistency helps employees who visit the pages of multiple ministries find what they need and work productively. It also helps content creators easily and confidently create pages using designs that have already been tested and improved upon.

Each ministry may rearrange, add, or exclude elements on pages to best suit their users' needs. Still, all intranet homepages have a similar structure.

1. **Header area:** The horizontal bar at the top of each intranet can take on whichever color and background a ministry desires. This freedom allows for some ministry-related branding, which makes individual intranets more recognizable at a glance.
2. **Intranet name:** The intranet's name—which can be either an acronym for the ministry name or a branded intranet name—is the first item in the upper left of the top horizontal bar. This name is large and clear, which is of the utmost importance since each of the ministries has its own intranet, and each, in turn, has its own name. These letters act as a signpost that tells employees which intranet they are on; the name also acts as a link to that intranet's homepage. Having this feature available in the same place on each ministry's intranet is helpful to users.
3. **Search:** The intranet search always appears as a white field on the right.
4. **Waffle menu:** A button with the label *Gå til* (go to) and a waffle icon appears on the right side of the top bar on each intranet. This menu makes it easy for users to access the ministry intranets and additional relevant platforms, such as shared workspaces in SharePoint. This small menu is one of the ways that the intranet acts as a hub for the entire DSS digital workspace.
5. **Content editing:** For those users with editing rights, the *Edit* button appears in the far upper right corner, giving them access to the CMS for creating and editing content, based on user rights.
6. **Logo and organization name:** A second colored bar (usually black) toward the top spans the width of the page. On the far left is a small lion logo, based on a heraldic lion, which is followed by the ministry or department name and appears in this spot on all ministry intranets.

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7. **Global navigation:** Each intranet's global navigation appears on the far right of the second (usually black) bar that spans the width of the page. Most ministries have almost identical information structures, including links to both internal and externals services and sites, which is helpful.
8. **Bookmarks:** On the far left of the third bar that spans the width of the page is a drop-down list of bookmarks. *Mine snarveier* (My shortcuts) includes both user-added items and standard shortcuts set by the site administrator.

Homepage

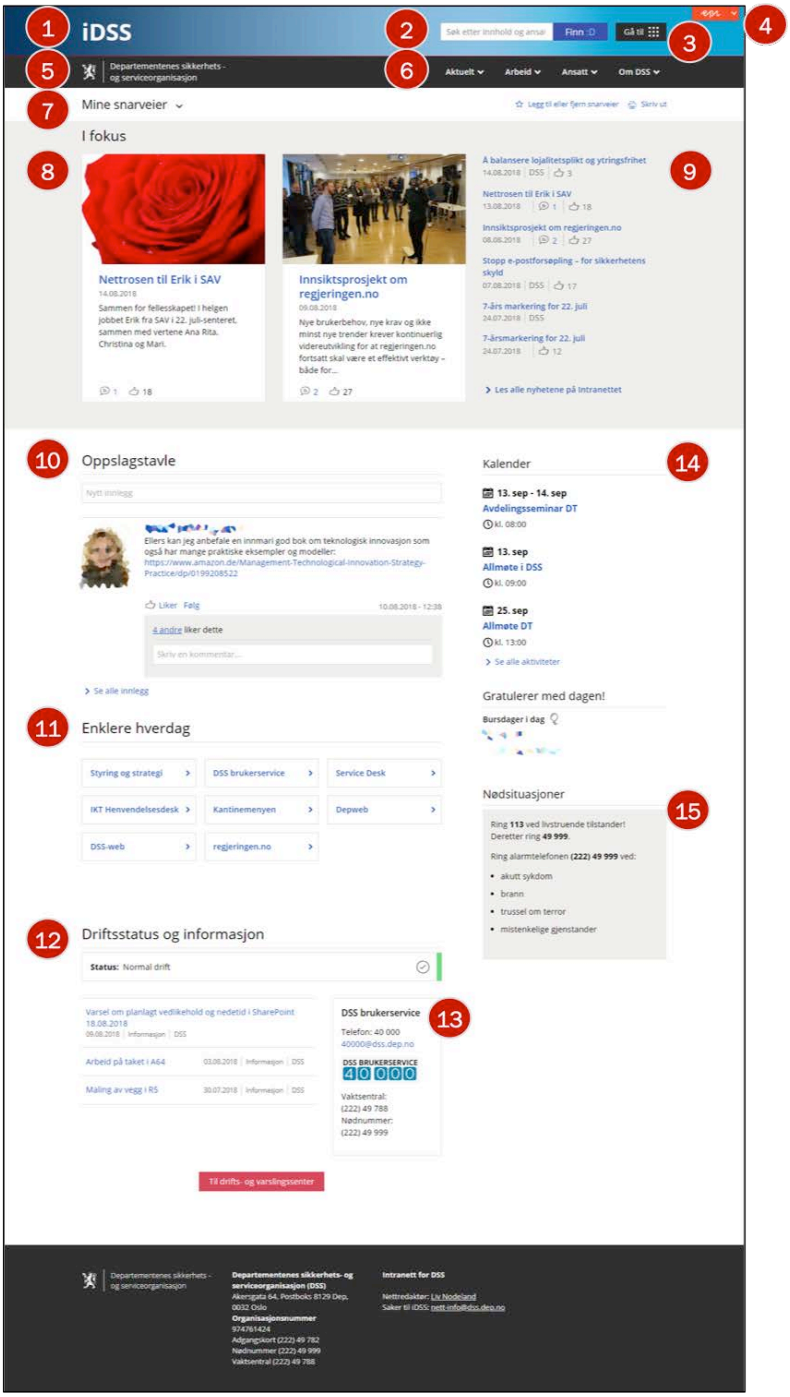


Image 207. Norwegian Government Intranet iDSS Homepage. The iDSS homepage offers news and a wall feed to help DSS employees stay informed. *207_GovNO_03_HomeWeb_Live.png*

Homepage, Highlights

The intranet homepage of DSS itself offers links to common tasks and user-created bookmarks that expedite DSS employees' work. The homepage keeps employees informed with a selection of news, links to more news, and a wall feed where employees can post and react to messages.

1. **Intranet name:** The intranet's name is the first item in the upper left of the DSS intranet homepage. Some ministries and DSS itself have intranet names that add an "i" before ministry acronym (such as *iDSS* and *iLMD* for the Ministry of Agriculture), while others chose catchier names, such as *FINTRA* for the Ministry of Finance and *Arena* for the Ministry of Knowledge.
2. **Search:** The intranet search appears as a white field on the right. The juxtaposition between the white field and blue background bar help make the field visible. This search field is common across all intranets at DSS.
3. **Waffle menu:** A black button with the waffle icon and the label *Gå til* (Go to) appears to the right of search. This menu makes it easy for users to access other relevant platforms, such as shared SharePoint workspaces.
4. **Edit button:** For those users with editing rights, the *Edit* button appears in the far upper right corner. Clicking it gives them access to the CMS for creating and editing content based on their rights.
5. **Logo and organization name:** On the far left of the black bar that spans the width of the page appears a small lion logo followed by the full name of the department.
6. **Global navigation:** The global navigation appears on the far right of the black bar.
7. **Bookmarks:** A drop-down list of bookmarks is on the far left of the white bar that spans the width of the page. *Mine snarveier* (My shortcuts) includes both user-added items and standard shortcuts set by the site administrator.
8. **Top News:** Two top news items appear at the top of the page in the *I fokus* (In focus) section. Each has an associated photo, clear title, date, summary, and number of comments and likes the story has garnered. Selected items, such as important articles, and the news list offer links to the full news listing.
9. **News list:** To the right of the top two news items is a list of six other recent news stores, each with simply a title, date, and number of comments and likes for each.
10. **Feed:** Below the news appears the *Oppslagstavle* (Bulletin board) feed, where employees can post, like, and comment on messages. This offers a way for engaged employees to correspond with—and potentially inspire—each other in a public way.
11. **Common links:** The center of the homepage houses the *Enklere hverdag* (everyday tasks) section with links to some of the most commonly used tools and resource pages on the intranet and on external websites.

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12. **System status:** It's important for employees to know when IT systems are having issues. *Driftsstatus og informasjon* (system status and information) shows a green link and checkmark when systems are all working as expected. A yellow or red line displays to indicate system issues, while a red button links to a page with more information.
13. **Contact:** The *DSS Brukerservice* (DSS service desk) has contact information for important services, including security and emergency services.
14. **Calendar:** The *Kalender* (Calendar) area in the right-side column includes important events and a link to all calendars so that employees can stay abreast of the upcoming happenings at various ministries. A nice feature here is the birthday greetings that wish a happy day to employees having a birthday.
15. **Emergency information:** Below the calendar in the right rail is the *Nødsituasjoner* (Emergencies) section, with information about emergencies and phone numbers to call in the event of an emergency. Many intranets don't house this sort of information, but they should, as it could help employees in a difficult situation.

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Mobile Homepage

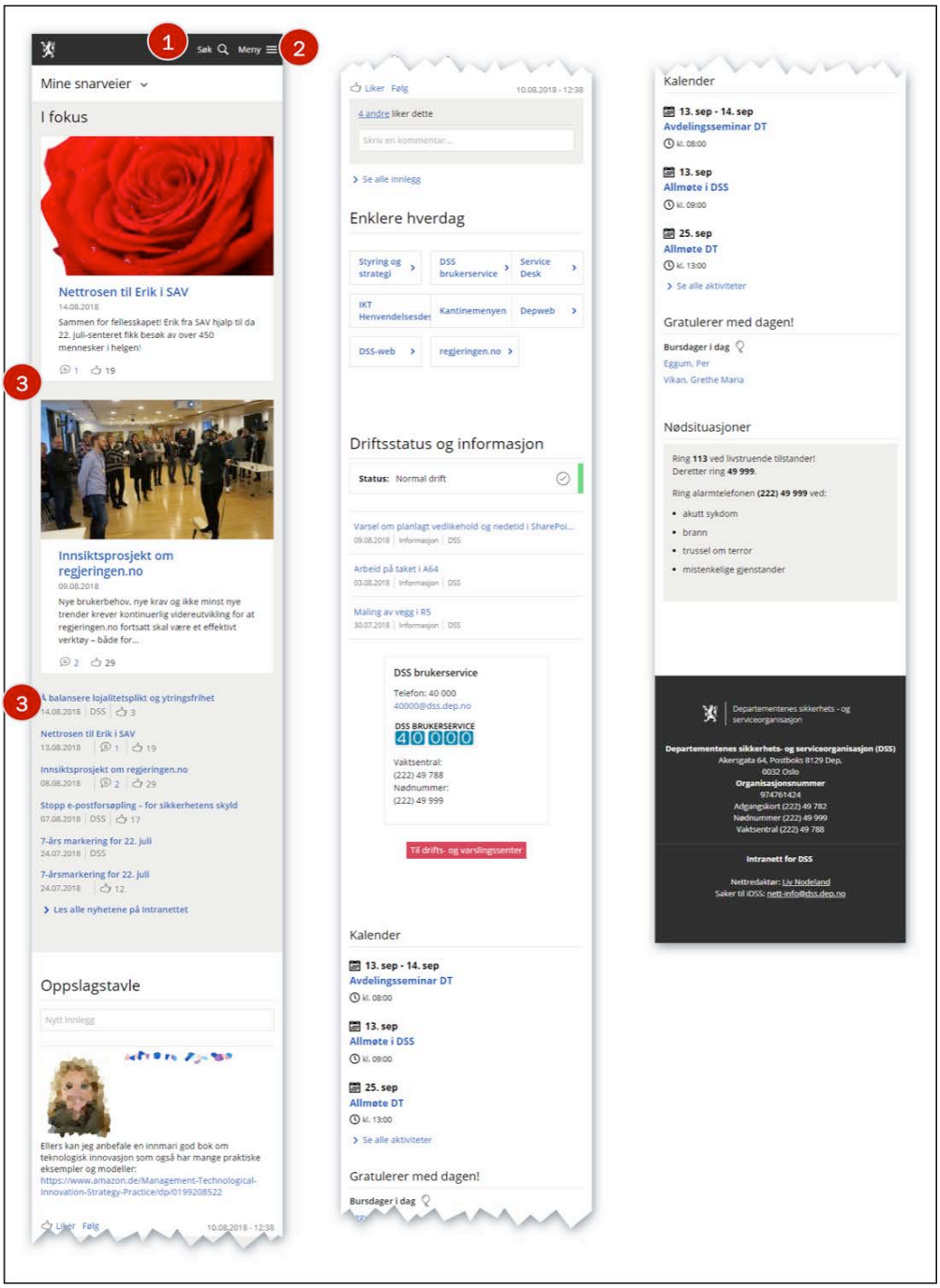


Image 208. Norwegian Government Intranet iDSS Mobile Homepage. The intranet platform is responsive, and all content available on desktop is also available on mobile. *208_GovNO_04_HomeDSSMobile_Live.png*

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Homepage, Mobile Highlights

Rather than eliminating content on mobile or creating different content for mobile, the team created a responsive site. The main differences between the site when accessed on desktop versus mobile relate to the size and organization of page elements and how the navigation is presented. Given technology and resource limitations, it couldn't create a fully responsive search function, but the team plans to reconcile this in a near-future release.

Using the intranet on mobile has proven very useful in some situations, and usage is steadily growing. Use on tablets is very high at some ministries, especially when employees are using tablets in lieu of laptops in meetings and out-of-office situations. Intranet use on phones has not yet reached high adoption rates.

1. **Search:** To save screen real estate on mobile, the search field is collapsed under a magnifying glass icon. The label *Søk (Search)* makes the feature especially easy for users to find.
2. **Menu:** As with search, the menu offers both an icon and a label—in this case, a hamburger icon and the word *Meny* (Menu). The global navigation and the waffle menu are collapsed under this icon.
3. **Content flow:** Two main news item appear first on mobile (as they do on desktop) and include the same information, photos, and features. To use space effectively, six other recent news items appear in the section below, as opposed to being adjacent as on desktop. Generally, designers employ the column drop responsive layout, where the information streams down in one column (rather than two) on mobile.

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Embassies Page (Example of Type-Ahead Portal Page)

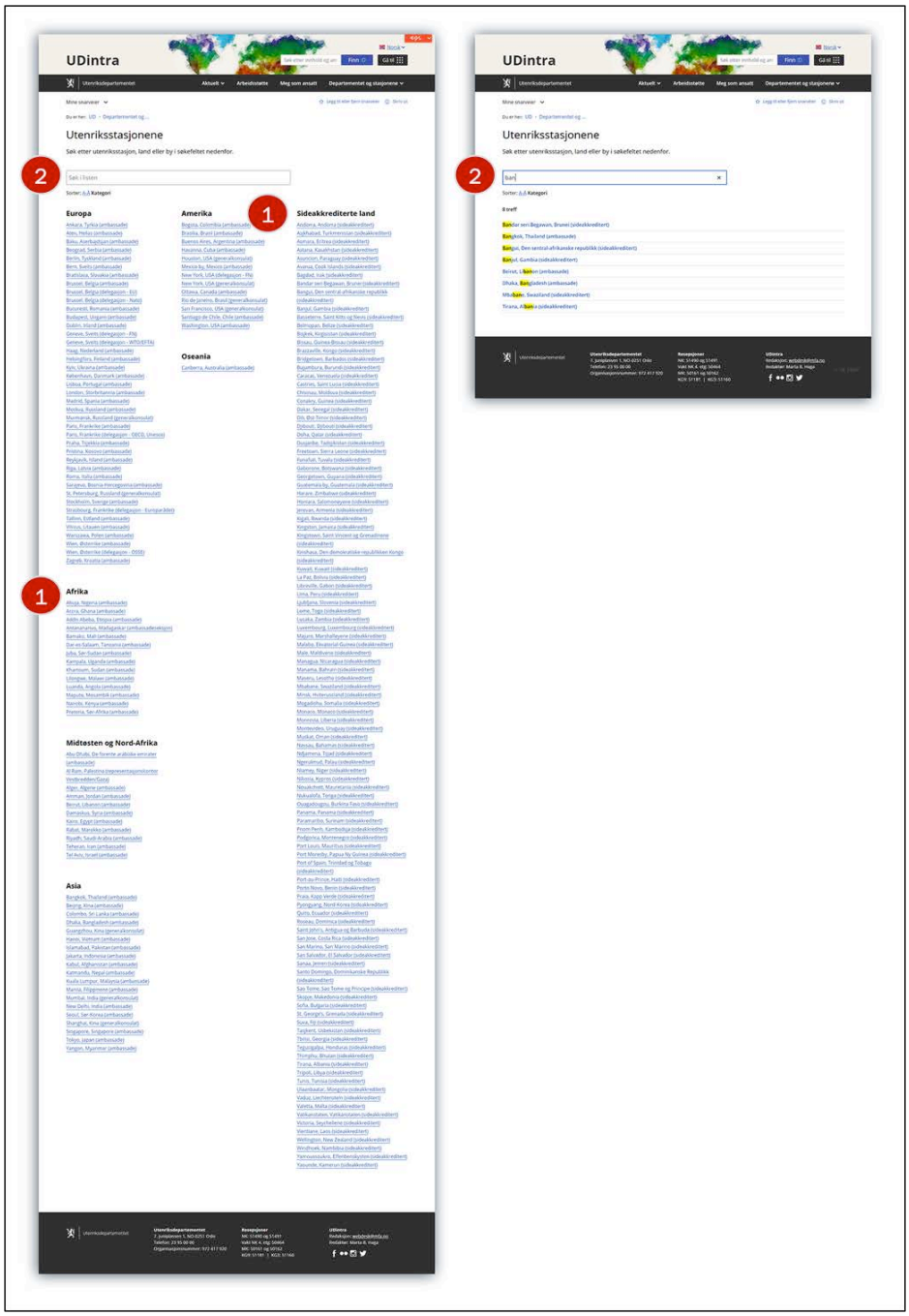


Image 209. Norwegian Government Intranet Embassies Page. A page pattern with a list and type-ahead feature is used on multiple pages, including a page of embassies, on the intranets at DSS.
209_GovNO_05_embassies_Live.png

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Embassies Page (Example of Type-Ahead Portal Page), Highlights

Employees need information about embassies to do their jobs. To expedite access to this information, the intranet offers a page that lists the embassies and offers a search feature. This is a perfect example of how one UI can cater to two user scenarios: users who want to scan everything available, and users who want to search for an explicit item.

This UI works for tasks beyond just finding embassies; indeed, the team includes this page pattern in the intranet design system. Such pages act as micro-portals, and all include type-ahead search. Several other pages across DSS use the same basic page format with various types of content.

1. **Subtitles:** Although the list of embassies is long, black bold subtitles of geographic areas stand out among the blue underlined links. If the users know their target embassy's region, they can begin their hunt by easily scanning to the subtitles.
2. **Search:** The type-ahead search feature makes it efficient for users to find their target embassy. Once users have typed in a few characters, the search function immediately displays embassies that match the query and highlights in yellow the matching letters in the results. The search field is visible at the top so users who know what they are looking for will easily see the search option first rather than start by scanning a long list.

Tools (Example of Type-Ahead Portal Page)

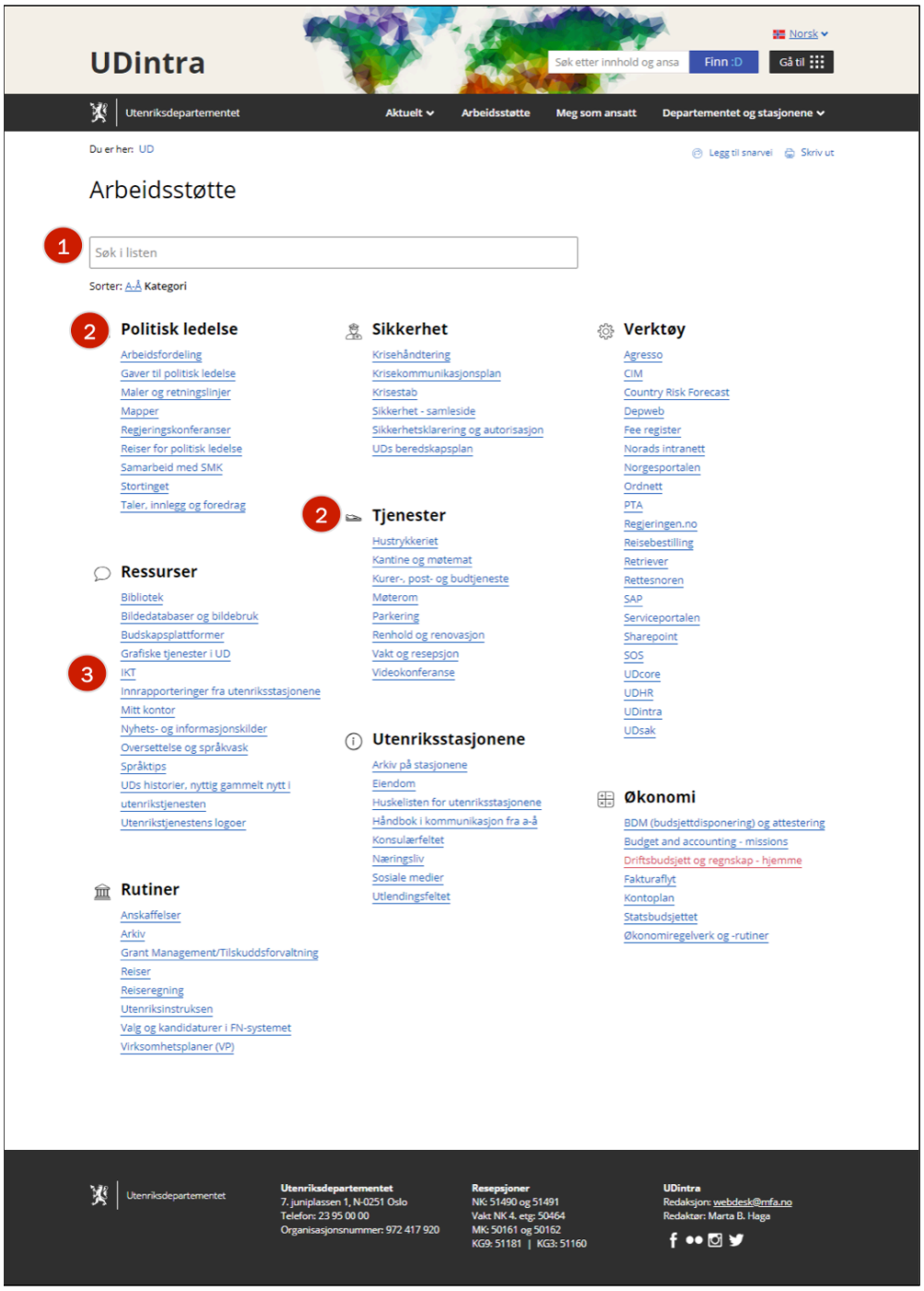


Image 210. Norwegian Government Intranet Tools. Users can scan the list of tools or search for the one they want. *210_GovNO_06_tools_Live.png*

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Tools (Example of Type-Ahead Portal Page), Highlights

Another micro-portal example, this one for tools, appears on the MFA intranet. The page consolidates a selection of important work-support tools. It's searchable, and the search offers suggestions as the user types.

1. **Search:** The search field caters to employees who know the name of the tool they are interested in.
2. **Sections:** Large bold black subheadings make it easy for users to scan tool categories, and then scan the set of links when they find the category they need.
3. **Links:** Links lead to various helpful items, including an external web site or service, a user manual, key documents, or enterprise software systems.

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Global Navigation Menu

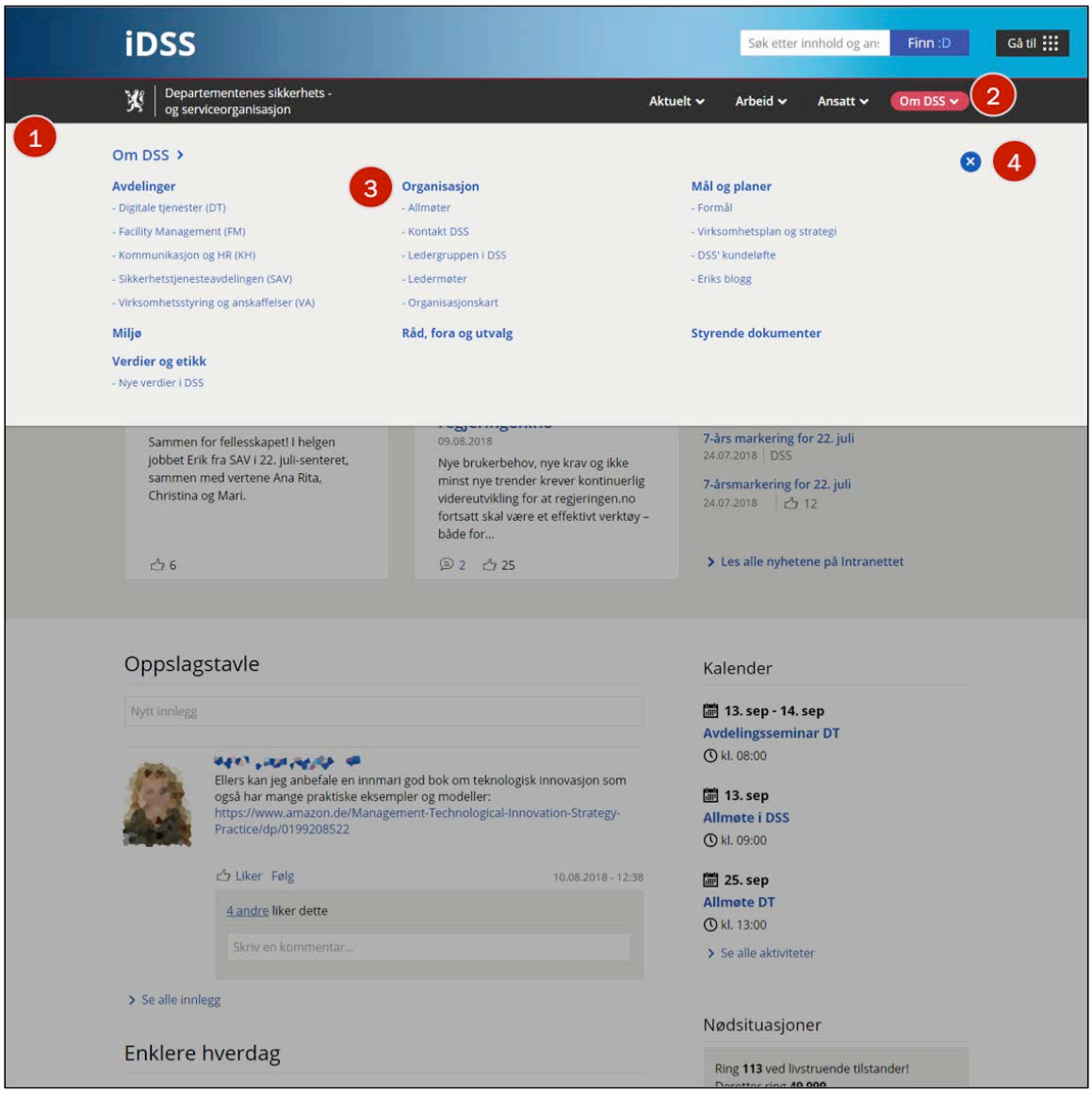


Image 211. Norwegian Government Intranet Global Navigation Menu. Card sorting and other usability testing methods informed the site's IA and global navigation megamenu design. *211_GovNO_07_MainMenu_Live.png*

Global Navigation Menu, Highlights

The DSS intranet team conducted extensive user research, including card sorting and user testing, to derive the site structure and hence the global navigation. The same megamenu UI design is used for each ministry's intranet, but the IA and global navigation links vary due to different needs and ministry sizes, which range from approximately 100 employees to more than 2,500. Ministries conducted their own usability tests and stakeholder workshops to determine the best site and menu structures. Still, most of their global navigation menu content is very similar to that of the DSS site (pictured).

1. **Megamenu:** The megamenu lets employees view several navigation links at once, without having to drill down a hierarchy. This expedites their work as they are more likely to see and rule out the least-likely links and click the best one for the task at hand.
2. **Selected menu:** The selected global navigation link in the top-level menu is designated with a pink oblong ellipse behind the white menu name.
3. **Subheadings:** The blue bold text, which is larger than the link text, indicates that these items are higher in the site structure than the navigation links. The visual treatment makes them easy to scan to.
4. **Close:** Sometimes users mistake very wide megamenus for part of the web page, and thus have trouble closing it. Here, an *x* icon in the upper right helps users escape that situation.

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Waffle Menu and Bookmarks

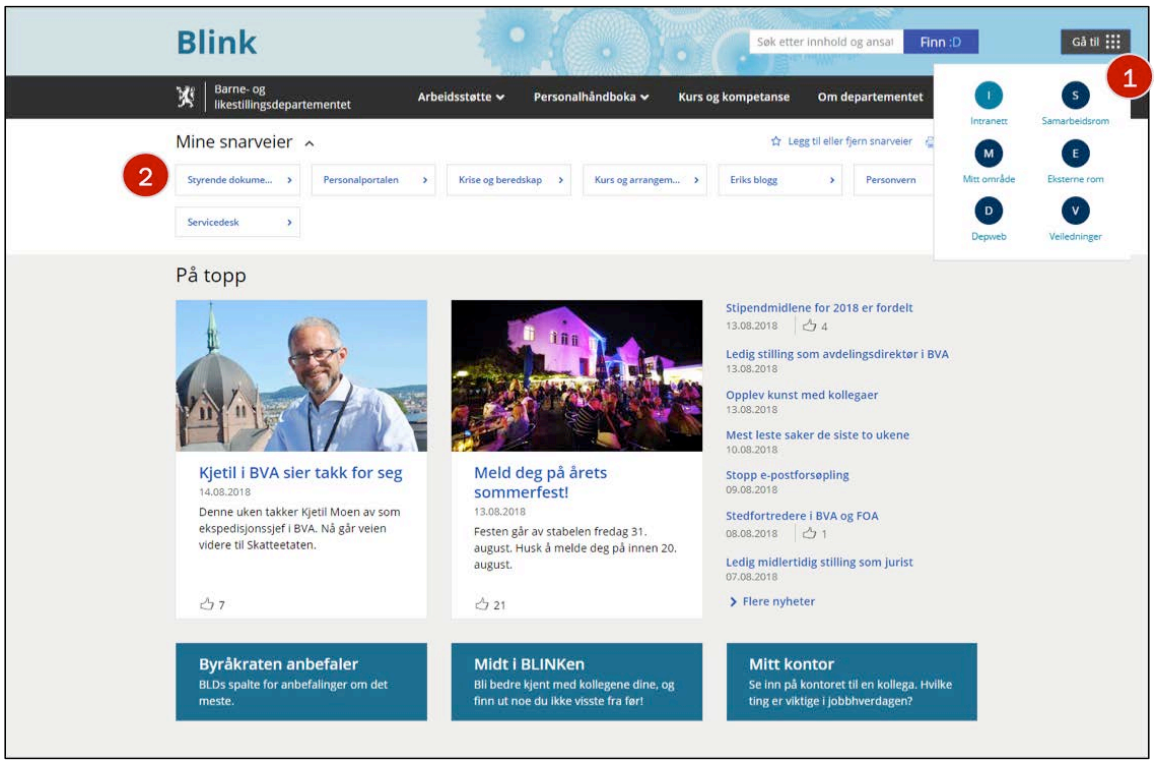


Image 212. Norwegian Government Intranet Waffle Menu and Bookmarks. The expanded waffle menu and favorites menu give instant access to important pages and applications.
212_GovNO_08_WaffleMenu_Live.png

Waffle Menu and Bookmarks, Highlights

Quick access is a theme for this design. The waffle menu provides quick access to tools beyond the intranet, while the bookmarks offer important links, including those chosen by users themselves.

1. **Other tools:** When expanded, the waffle menu displays links to collaboration and information tools such as *Samarbeidsrom* (shared workspaces on a SharePoint platform), *Mitt område* (SharePoint My Page), *Eksterne rom* (cloud-based collaboration with external participants), *Depweb* (the common extranet), and *Veiledninger* (user manuals).
2. **Bookmarks:** When expanded, the *Mine snarveier (My shortcuts)* section displays links to important areas, including links the user has personally added to the list.

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Mobile Menu and Search

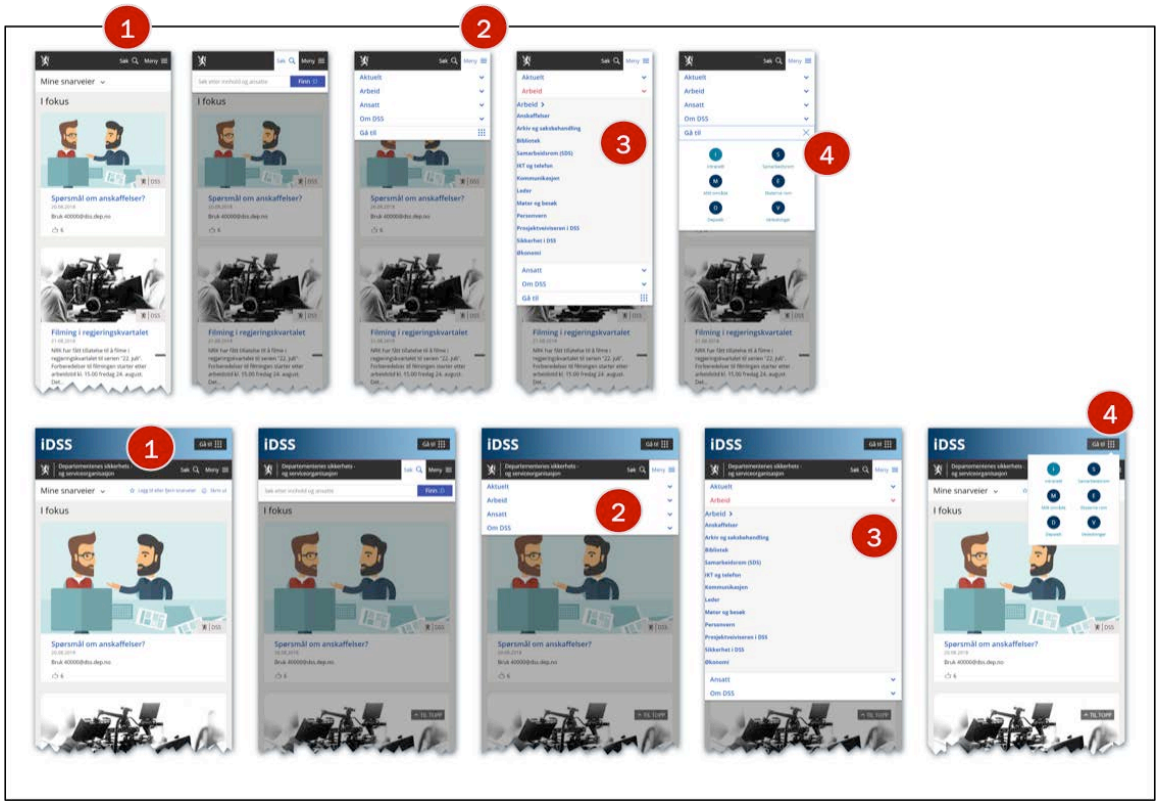


Image 213. Norwegian Government Intranet Mobile Menu and Search. The menus and search feature collapse under icons on mobile to save screen real estate. *213_GovNO_09_menus_mobile_Live.png*

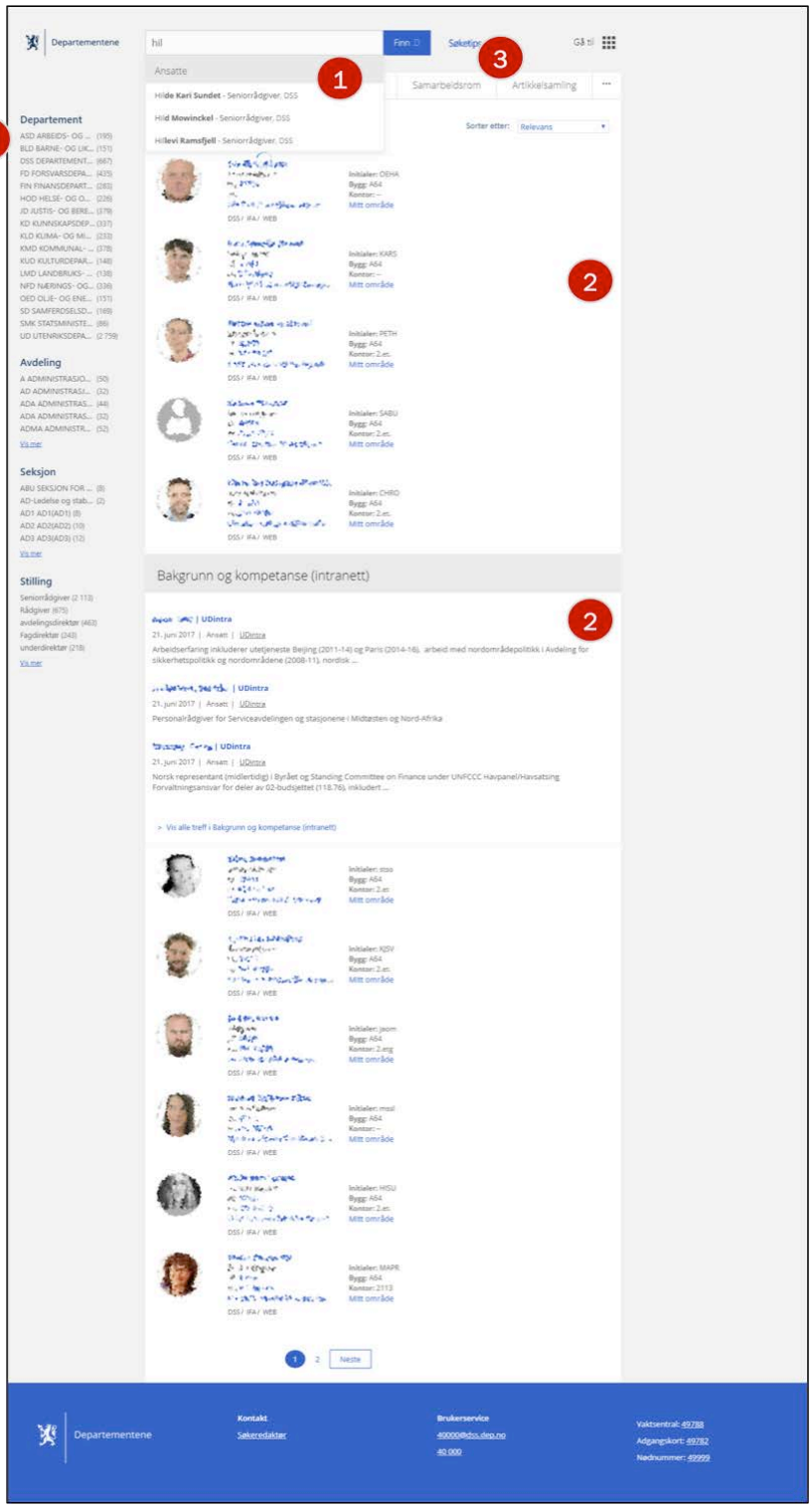
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Mobile Menu and Search, Highlights

The responsive intranet takes on common space-saving attributes when accessed on mobile. To make the most of each medium, there are subtle differences between how the site appears on phone versus tablet.

1. **Search icon:** When the site is accessed on a mobile device, the search field collapses under a magnifying glass icon to save space.
2. **Menu:** When the site is accessed on a phone, the hamburger menu houses the global navigation and waffle menu. On a tablet, the waffle menu keeps its own icon rather than collapse under the hamburger menu. This is one of the differences between viewing the site on a phone and a tablet. The navigation links and waffle menu are collapsed by default on both device types.
3. **Accordion:** Expanding the global navigation accordion menu displays the second-level menu links. These appear outdented with a grey background. The selected level-one menu item turns red, while the others remain blue. These visual changes help users recognize what they have selected.
4. **Waffle:** On phones, the waffle icon at the bottom of the global navigation menu offers a clue that this is not like the other links in the menu. When clicked, the waffle expands the menu, a lot like an accordion. On tablet, the waffle menu appears in the upper right (as on desktop).

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Search

Image 214. Norwegian Government Intranet Search. Search suggestions and results are targeted based on user affiliation and rights. *214_GovNO_10_search_Live.png*

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Search, Highlights

The ministries create and rely on a great deal of information. A well-considered but not overdesigned search feature helps employees locate the content they need. And, like obliging elves on the back end, the search makes wise decisions to target the results to the logged-in user, cutting away the junk. For example, when an employee searches for people, the closer in organizational proximity each result is to the user, the higher that result will appear. So, colleagues the employee is more likely to work with have higher relevance than organizationally distant colleagues. Similarly, suggested search results that appear as the user is typing are based not only on the letters typed, but also based on the query's relevance for the logged-in user. Further, the search can query all of the ministry sites and return results no matter the source, but the SERP includes only sites the user has access to—again, eliminating noise. Finally, intranet editors have the option to create best bets, bubbling up the top result related to the query.

1. **Suggestions:** As users type, suggested search results appear below. These help users get to relevant results directly without even visiting the SERP. Further, the suggestions are based not only on letters in the alphabet, but also on which content is most relevant to the logged-in user. This is the kind of distinct feature that makes the DSS intranet platform one of the 10 best of the year.
2. **Results types:** The SERP displays results of people as well as content, and similar results are grouped together.
3. **Filters:** Employees can filter results by content source using tabs (with each tab offering more-detailed filtering options) or by clicking any of the keywords in the facets list on the left.

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Search Best Bets

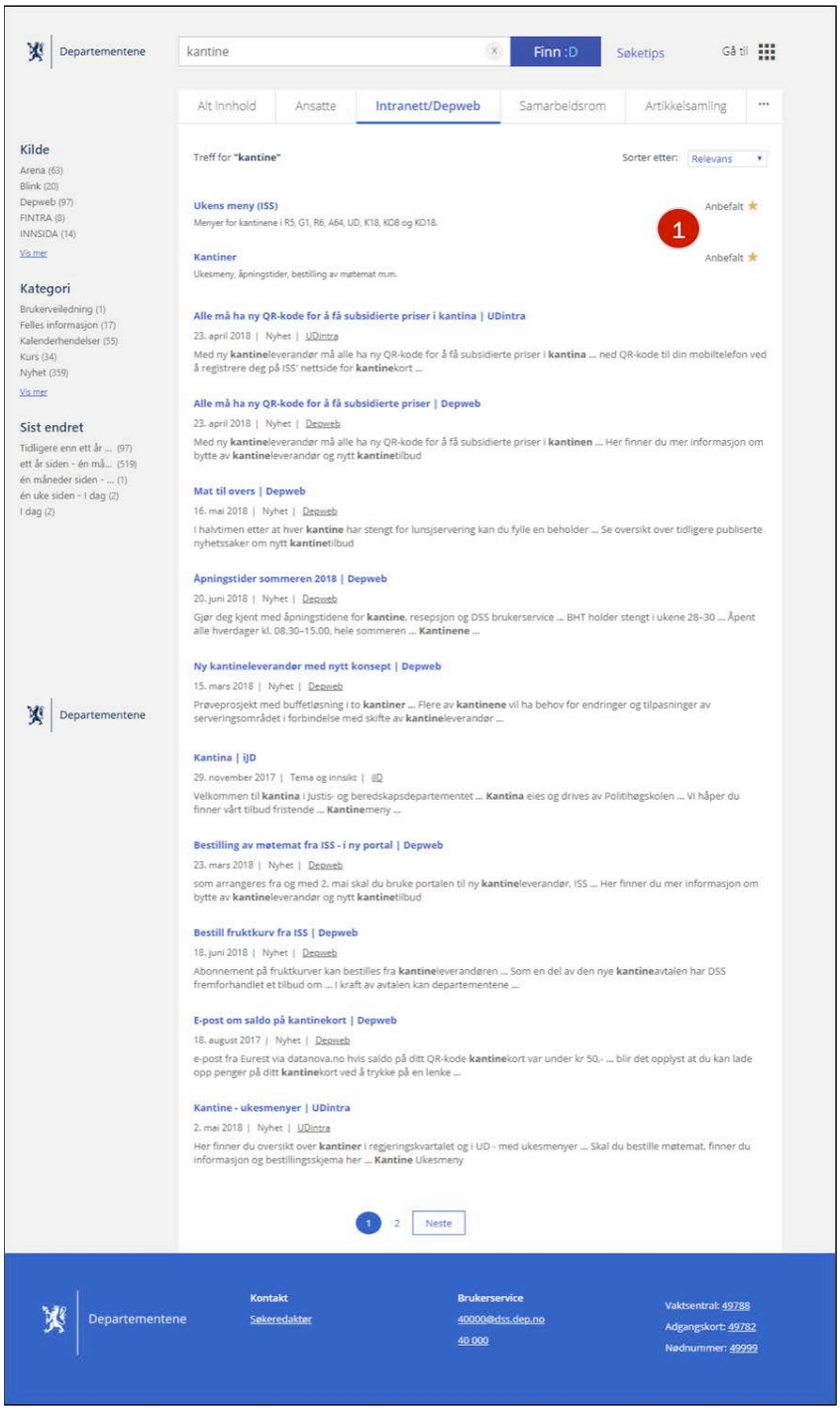


Image 215. Norwegian Government Intranet Search Best Bets. Best bets are like a search results insurance policy.
215_GovNO_11_search_best_bet_Live.png

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Search Best Bets, Highlights

The team is always working to improve intranet search. For example, as part of the editorial process, the team analyzes search statistics for trending terms and creates synonym rings so words with the same meanings return equally good results.

As a safeguard, the team added the capability to create editorial best bets, which lets team members choose documents related to a query term and ensure that those documents appear in the search results.

1. **Best bets:** The best bets search results appear at the top of the SERP; the word *Anbefalt* (Recommended) appears to the right of the title with a star icon.

Search Filters

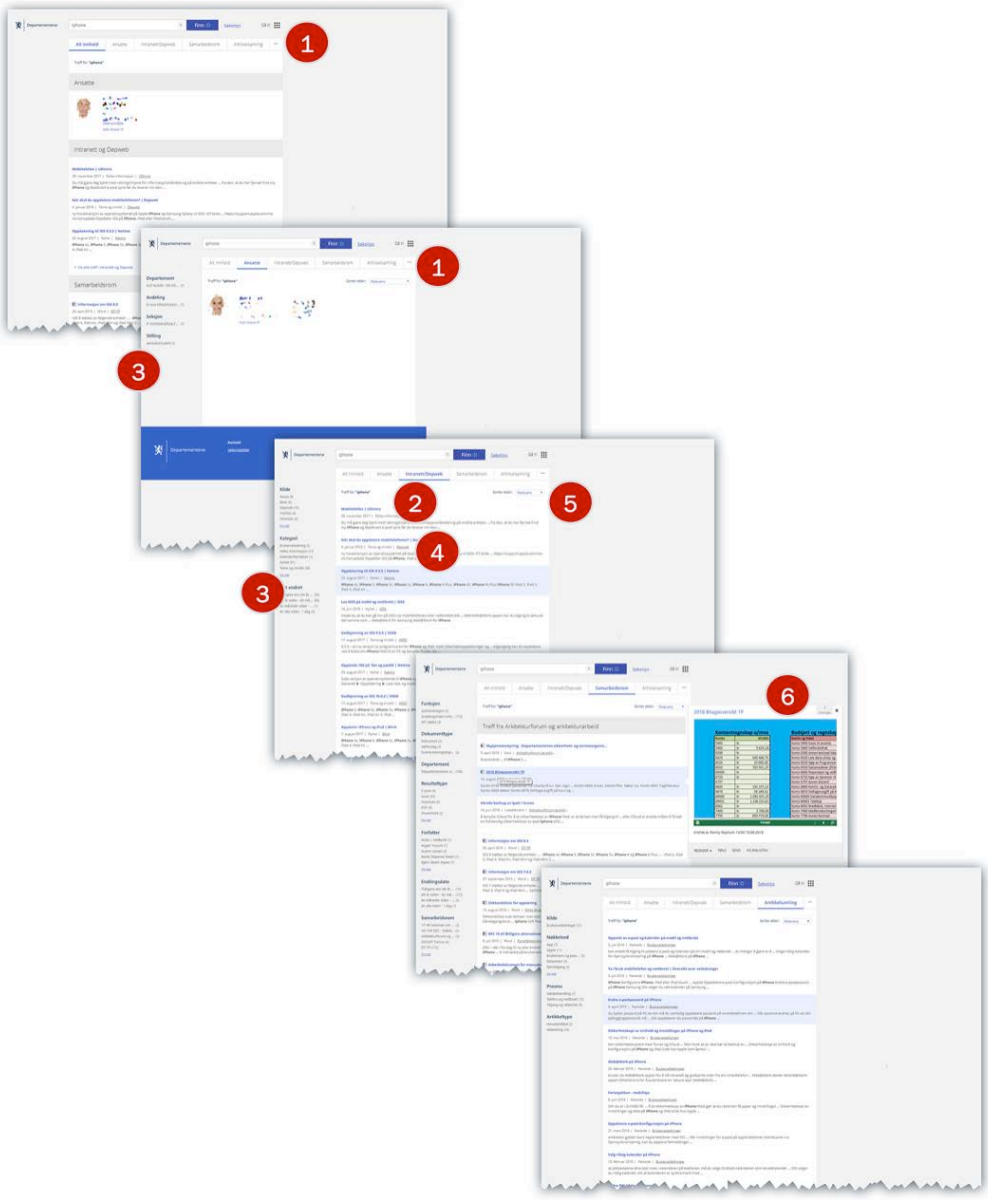


Image 216. Norwegian Government Intranet Search Filters. The search results are organized in tabs, each named for a different content source. *216_GovNO_12_search_facets_Live.png*

Order NNG190115-7904-48466

Search Filter, Highlights

The most important content sources are represented in tabs at the top of the SERP.

1. **Tabs:** Tabs just below the search field include those for all results, employees, intranet/extranet, collaboration rooms, user guidelines/knowledge base, the HR portal, and the user's SharePoint homepage. Less important content sources are placed in a menu to the right of the tabs. The first tab on the SERP is for all results, which includes results from all content sources.
2. **Selected tab:** The selected tab is obvious: the text is blue instead of light grey, and the tab is underlined.
3. **Facets:** All tabs (except "all results") have facets for that content source.
4. **Clickable metadata:** In addition to the clickable result title, the SERP includes other clickable metadata that lets users start a new query. For example, a search for a colleague by name will return a result for that person. Within the result's summary is a clickable link to the person's department, and users can quickly view the person's department colleagues by clicking the department name.
5. **Sort:** Results are initially sorted by relevance, but a drop-down menu just below the tabs allows users to sort the results by date or alphabetically.
6. **Preview:** For documents housed in the collaboration room, the search provides a document preview. This appears on the right side of the SERP when the mouse hovers over the result. Seeing the document can give users an idea of what the document is about without having to open it. From the preview, users can also follow or share the document.

News Article



Image 217. Norwegian Government Intranet News Article. Obvious subheadings make it easy for employees to scan articles and thus save time. *217_GovNO_13_article_w_comments_feedback_Live.png*

Order NNG190115-7904-48466

News, Highlights

Articles keep employees across the various ministries involved and informed.

1. **Title:** The article's title takes its rightful place at the top of the page.
2. **Images:** Large related photos make the article more engaging and informative.
3. **Date:** The publish date appears above the article's copy, informing users of how current the story is.
4. **Byline:** The authors, a link to email them, and their phone number appear in the right rail at the top of the article. With this, employees can offer their thoughts or engage directly with authors.
5. **Subheadings:** Subheadings are the single most important UI design element when designing for scanning—and DSS nailed them. Subheadings appear within the article and are larger, bolder, and darker than the article's body text. This makes it easy for the human eye to pick them out when scanning the page.
6. **Social:** At the end of the article, employees have the options to like and comment. This, of course, makes it possible for employees to participate, but also helps authors and management understand which topics are most interesting to the staff.
7. **Feedback:** A feedback form at the bottom of the page lets readers inform the team about any issues with the page. A question—Fant du det du lette etter? (Did you find what you were looking for?)—appears before an open text field where users can write their comments.

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News Article Translated

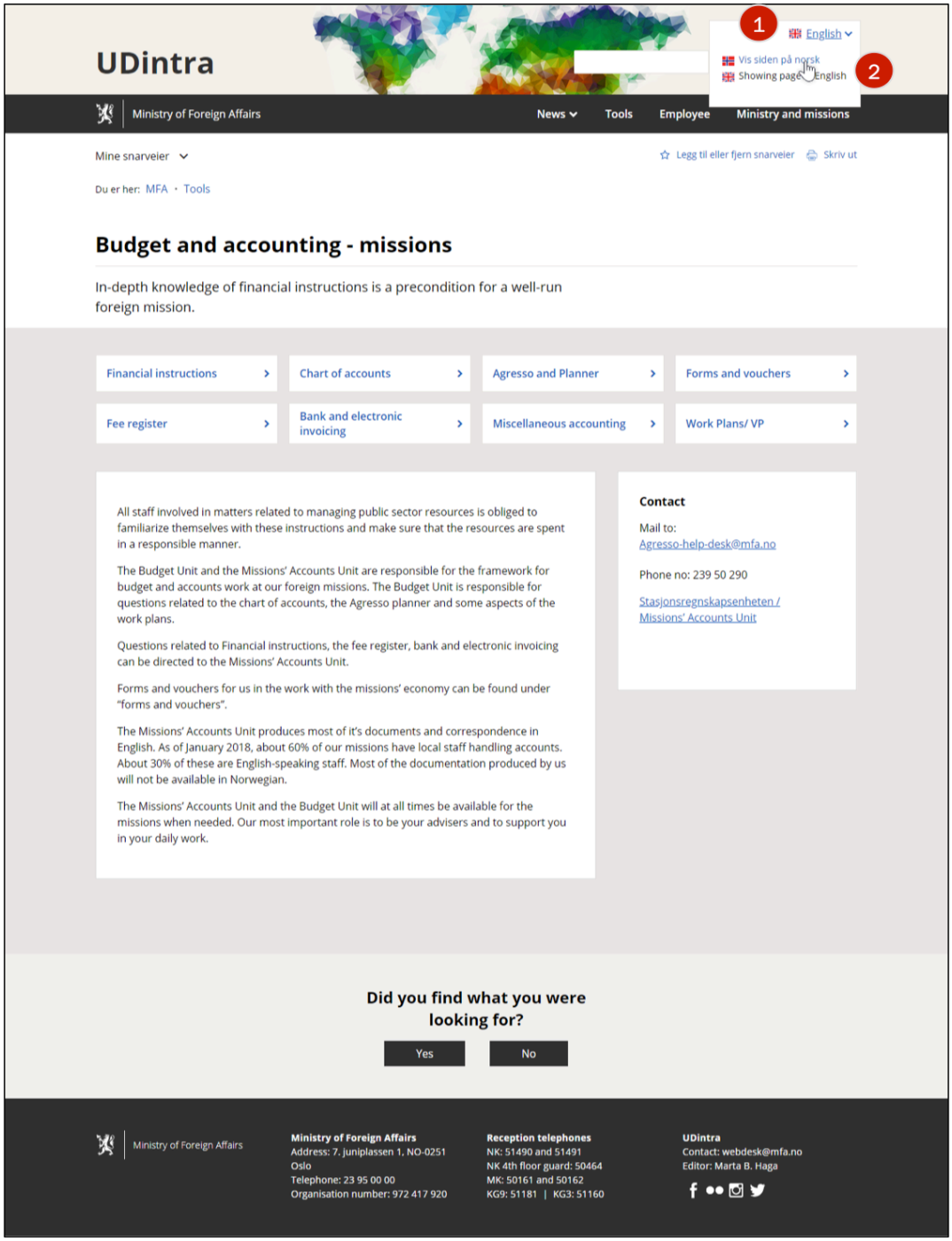


Image 218. Norwegian Government Intranet News Article Translated. With the click of an icon, the article displays in a different language. *218_GovNO_14_Article_EN_Live.png*

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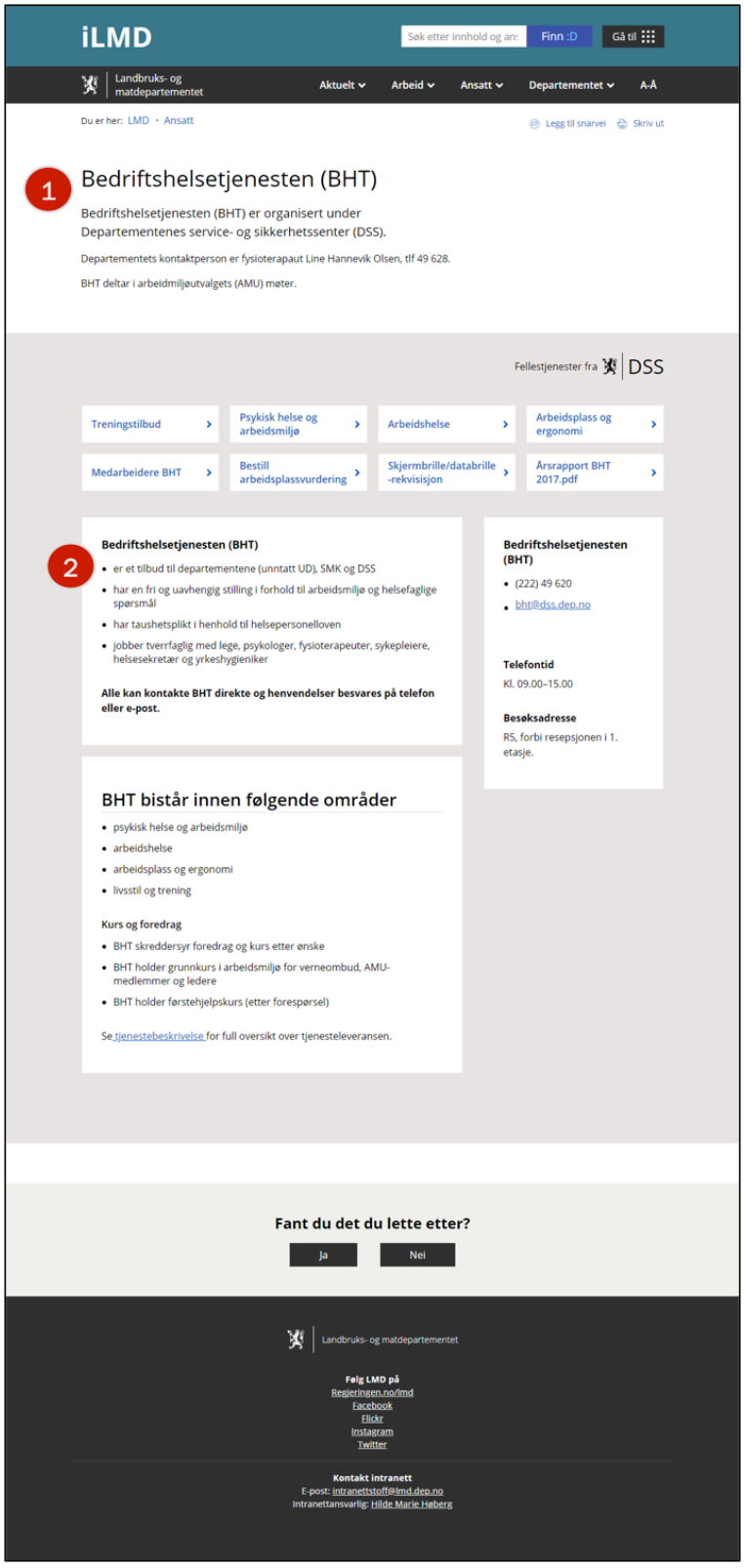
News Article Translated, Highlights

Most of the employees who use the intranet platform are fluent in Norwegian. In a few cases, however, information must also be provided in English.

1. **Icon:** A flag icon appears in the far upper right of the page if the article is available in English.

Text label: The icons' text label makes abundantly clear the current state—here, *Showing page in English*—as well as the action users can take: Vis siden på norsk (Show page on Norwegian).

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News Article with Common Content

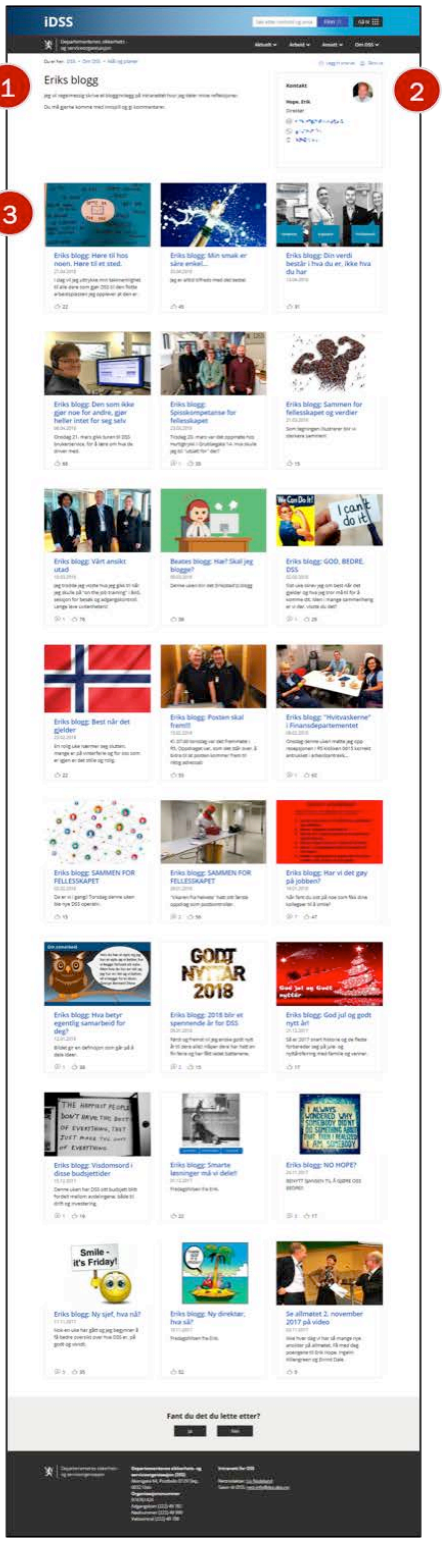
Image 219. Norwegian Government Intranet New Article with Common Content. Depweb, the overarching intranet for all ministries, publishes a range of articles that the other intranets can reuse and edit to provide ministry-specific information. The screenshot shows one such article from Depweb tailored to the needs of the Ministry of Agriculture and Food. *219_GovNO_15_Article CommonContent_Live.png*

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News Article with Common Content, Highlights

Depweb, the overarching intranet/extranet for all ministries, publishes a range of articles that the other intranets can reuse. Further, the ministries can supplement the article, adding content above or below the article's text to suit their employees' specific needs. To ensure that all ministries have the most accurate and updated content, the shared content is linked to the main article on Depweb. Thus, if the main article is edited, the content shared on other intranets will automatically be updated to reflect the changes. If that's not brilliant enough, the intranet is also smart enough to leave the ministry-specific information intact after updates.

1. **Ministry-specific content:** The text just below the page title, *Bedriftshelsetjenesten (BHT),* is ministry-specific and was added by the LMD intranet editor.
2. **Shared content:** The Ministry of Agriculture and Food posted the Depweb-produced article, adding information about the ministry's own contact person above the shared content.



Management Blog

Image 220. Norwegian Government Intranet Management Blog. The director of DSS writes a blog to help keep employees informed. *220_GovNO_16_blog_Live.png*

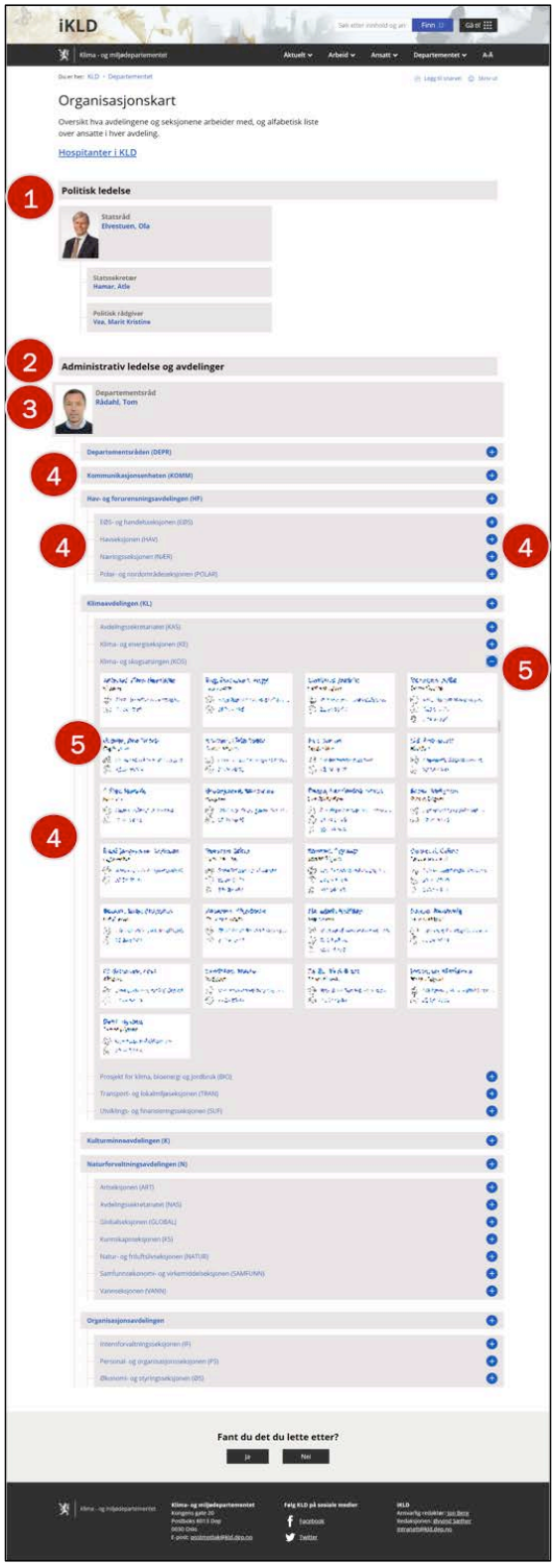
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Management Blog, Highlights

The DSS Director uses the intranet platform to share ideas and invite informal feedback. He shares experiences from “on the job training” during his visits to different departments where he participated in daily tasks. He also mentions current activities in the organization as a whole. This is a delightful way to show employees that management cares enough to communicate with them and wants to hear from them as well.

Most Norwegian government intranets are ministry-specific. In some ministries, the secretary general—who holds the highest position that is not politically appointed in a ministry—offers management blogs.

1. **Informal:** Using the DSS head’s first name as the blog name, *Eriks blogg,* punctuates the informality of the medium.
2. **Photo and contact:** The blog author’s photo, name, title, and contact information appears in the upper right. In a shrewd move, the designers don’t take for granted that every employee knows who each high-level manager is; it always helps to see a name, photo, and title.
3. **Cards:** Each blog entry is summarized in a card on the blog’s main page. The card displays a related image, the blog title, the date it was published, a summary, and how may likes it has acquired.



Organization Chart

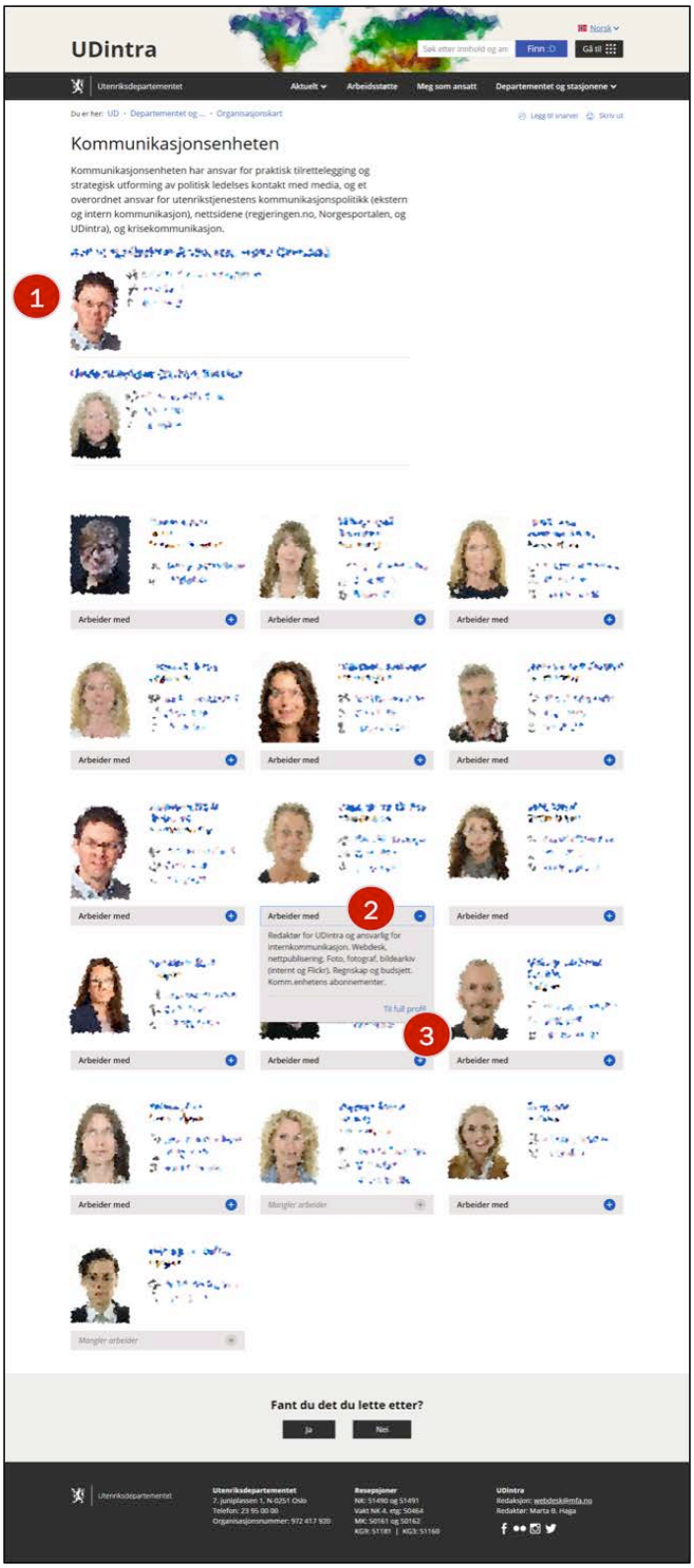
Image 221. Norwegian Government Intranet Organization Chart. Single-page expandable organization maps for the entire ministry make finding contacts within an organization quick and easy. *221_GovNO_17_Organization_map_Live.png*

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Organization Chart, Highlights

Each ministry displays its entire organization on one page in an org chart. These are automatically created with information sourced from back-end systems. The org charts make it possible for employees to get a good sense of how a ministry is organized.

1. **Political staff:** The minister is presented at the top of the chart, along with a photo. Names of political advisors (in this case, there are two) appear just below the minister.
2. **Administrative staff and departments:** Departments and sections in the ministry appear after the minister and advisors.
3. **Ministry head:** The name and photo of the secretary general (the ministry's highest nonpolitical position) appears next.
4. **Departments and sections:** A list of departments (and sections, when applicable) appears next. Department names are in bold, while sections are in smaller text and indented. A plus sign icon on the right expands the department or section to show employees. Clicking a department or section name leads to a page describing the unit and showing its employees with photos.
5. **Department or section staff:** Clicking the plus sign on the right expands the department or section to reveal employees. Clicking an employee name leads to the employee's page.



Organization Chart Section

Image 222. Norwegian Government Intranet Organization Chart Section. The org chart enables users to home in on a section of the ministry, right down to particular employees. The links on employee names lead to their profile documents. *222_GovNO_18_Organization_map_section_Live.png*

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Organization Chart Section, Highlights

Extensive user research—user surveys and interviews, web analytics, and heuristic expert analysis—revealed that employee search and information about organizational structure are the ultimate top tasks at DSS. The intranet team thus created a robust org chart that links to employee profiles.

1. **Photo, name, title, and contact:** When looking at a section of a ministry, users can home in on employees to see more detail. This basic information is provided by HR systems.
2. **Background:** In addition to basic name and job title, users can choose to write and publish a summary of their background and fields of expertise. If available, users can access that background by clicking the blue plus sign icon that appears below the person.
3. **Profile:** Users can see their colleagues' employee profiles by clicking the *Til full profil* (to full profile*)* link (see the screenshot below).

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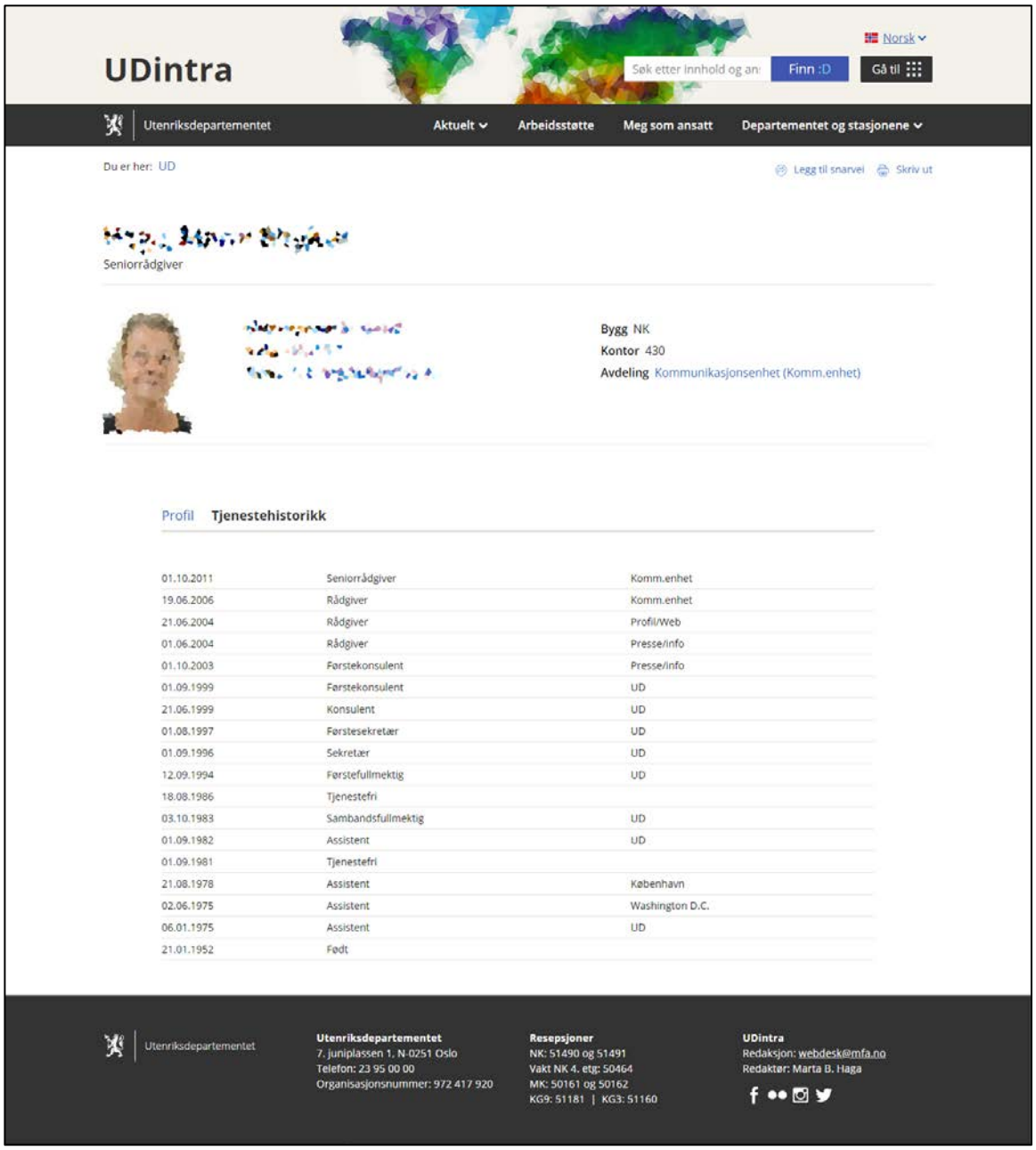


Image 223. Norwegian Government Intranet Employee Profile. Employee profile pages provide detailed information on each employee. Each ministry can decide the level of detail to provide; here, the MFA provides a detailed list of positions that an employee has held within the ministry. *223_GovNO_19_Employee_profile_Live.png*

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Employee Profile

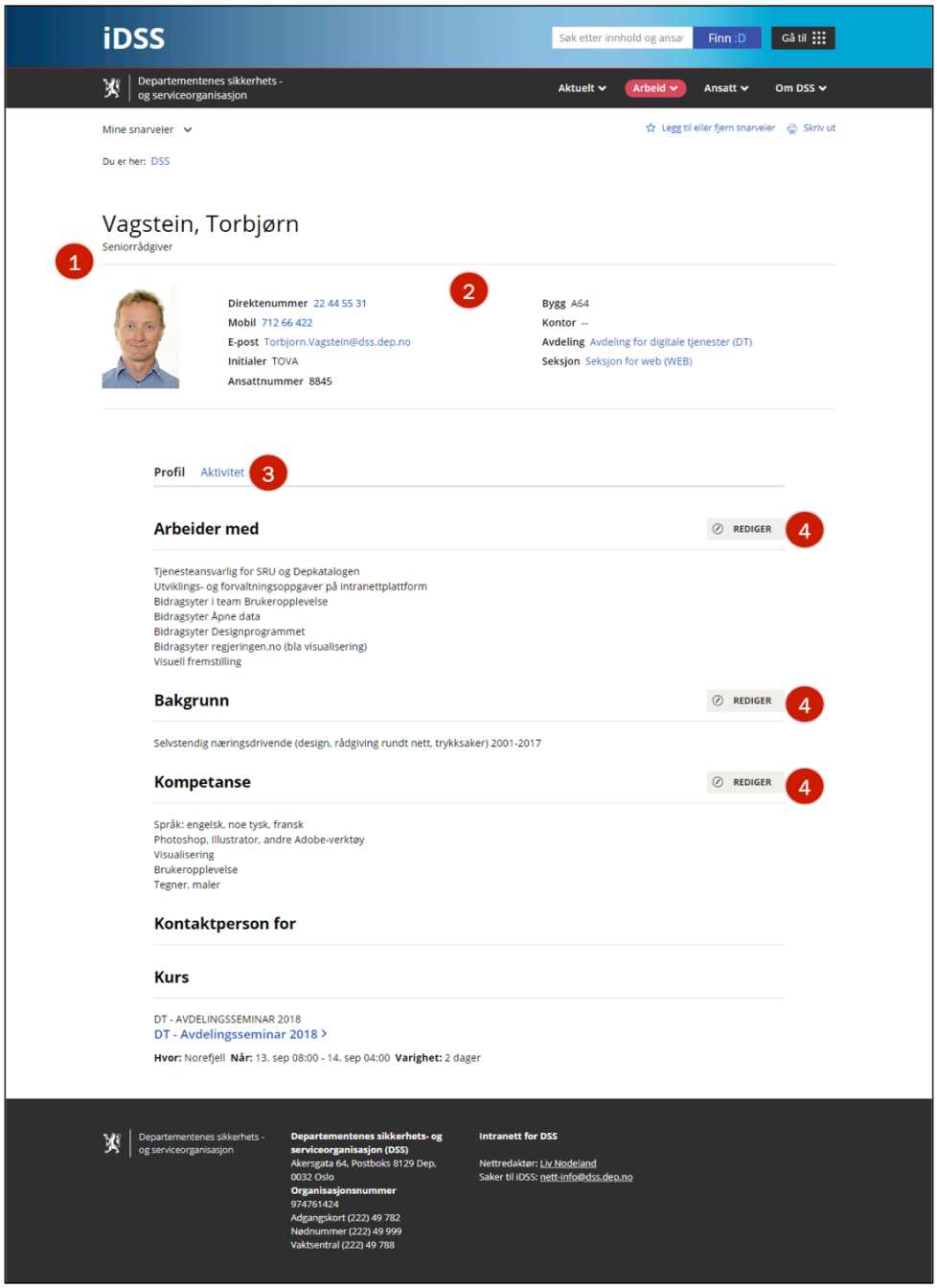


Image 224. Norwegian Government Intranet Employee Profile. An employee profile page for a DSS employee shows detailed contact information including email address, phone number, cell phone number, office location, and employee number. *224_GovNO_20_Employee_profile_Live.png*

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Employee Profile, Highlights

Employee profile pages provide information about each employee. Each ministry can decide which information and how much detail the profiles will provide. Profile pages are populated by information provided by HR systems, and some sections are populated by the employee.

1. **Name and photo:** The user's photo appears at the top just below the name.
2. **Contact:** Since colleagues typically need contact information, it appears front and center in the employee profile.
3. **Profile / activity:** The profile tab (see 4 below) describes the work activities, background/education, and so on that are relevant for other colleagues. Users can also see their social activity under the *Aktivitet* tab. This section, private to the logged-in user, displays liked articles and comments, and user-customizable feeds from social networks. This makes it easy for users to monitor their own social activity.
4. **Editable sections:** Users can edit the detailed profile sections by clicking the associated *Rediger* (edit) button.

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Workspace Health (Form)

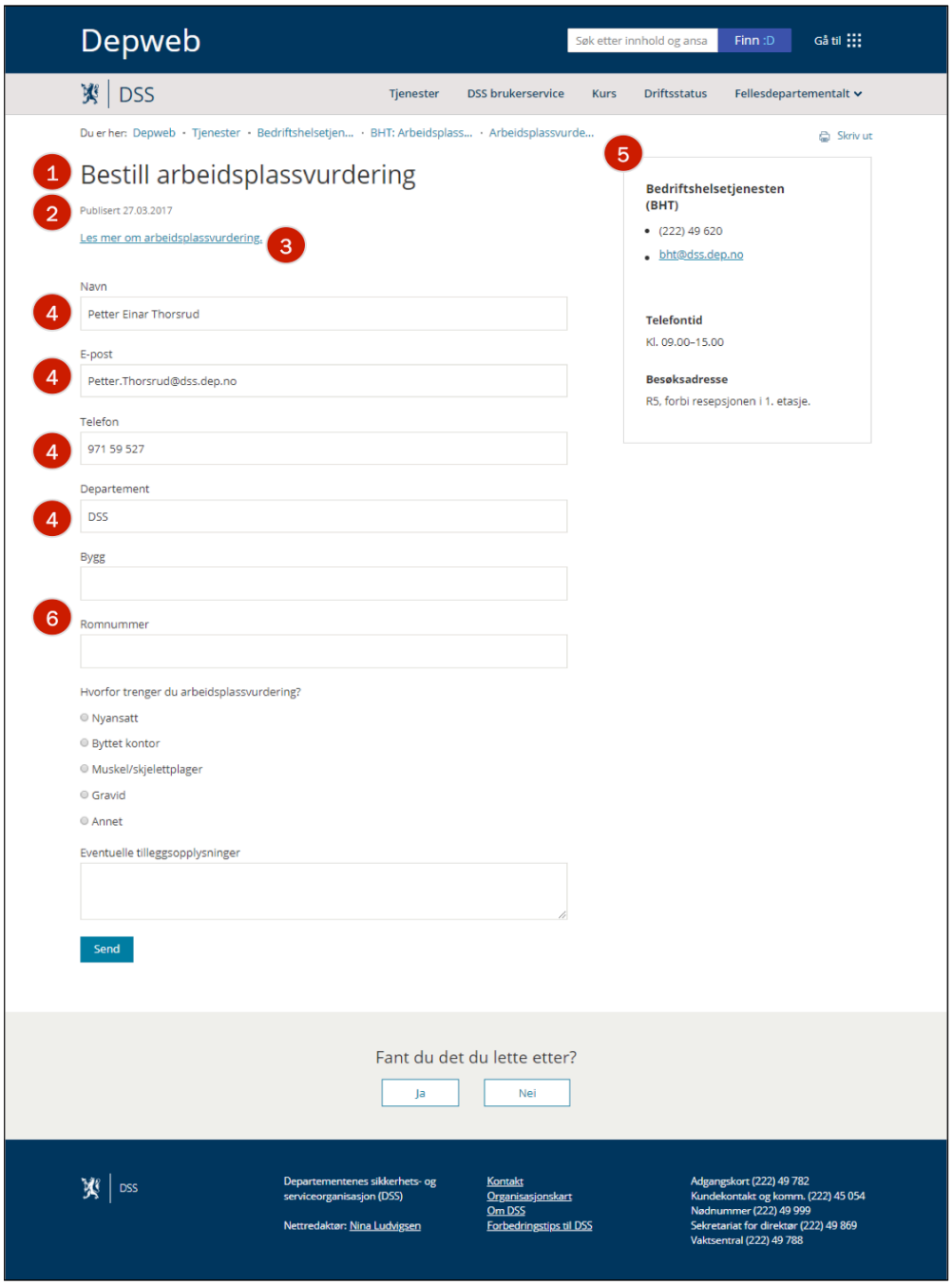


Image 225. Norwegian Government Intranet Workspace Health (Form). Intranet editors can create consistent forms for any tasks, such as this one, which is used to request help for improving the employee's physical workspace. *225_GovNO_21_corporate_health_Live.png*

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Workspace Health (Form), Highlights

Intranet editors can set up forms for just about any task. Some forms are integrated with back-end systems, while others generate an email for further processing. Regardless, the experience users have with forms is consistent, which eliminates unnecessary UI-related confusion.

DSS uses the intranet to expose employee benefits, such as helping to ensure that their workspaces are ergonomically safe and comfortable. A form enables employees to ask for help in adjusting their workplace.

1. **Name:** The name of the form appears in large letters at the top, confirming to users that they are in the right place.
2. **Date:** The date when the form was last updated is listed below the title. While this may not always be meaningful, if a form's date is very recent, the users may feel more confident about the form being up-to-date.
3. **More information:** The link below the date, *Les mer om arbeidsplassvurdering* (read more about workplace assessment), offers employees an opportunity to better understand what the benefit is all about.
4. **Prefilled content:** Whenever possible, the system prepopulates fields with the user's information. This seems like a no brainer, but because of complex back-end systems, many intranets don't take this step (unlike almost every public-facing e-commerce site). Good on you, DSS!
5. **Contact:** Phone numbers, email addresses, and other relevant contact details appear in the right column.
6. **Field labels and spacing:** Field labels appear just above and left-aligned with the associated field, making the text easy to scan and associate with the correct field. On the same note, the right amount of vertical space exists between the label and its field, and the field and the label below it. This visual design attention means users won't accidentally associate the wrong label with a field.

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Visitor Registration

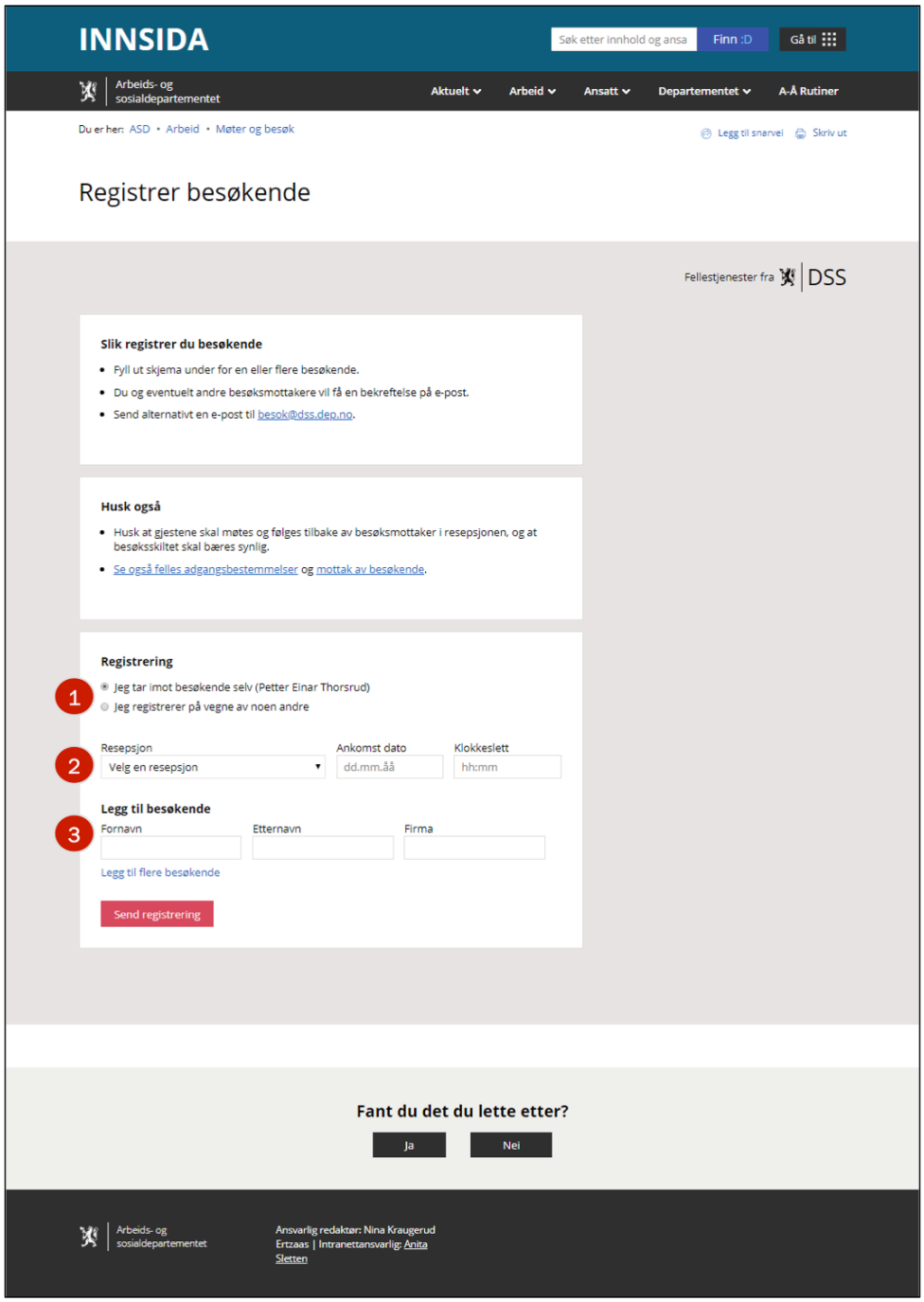


Image 226. Norwegian Government Intranet Visitor Registration.
Employees can easily preregister visitors thanks to a simple form.
226_GovNO_22_visitor_administration_Live.png

Visitor Registration, Highlights

With security of the utmost importance at many offices, ministries take it to a higher level than many places. At the very least, visitors must be registered before entering buildings. The intranets make this easy with a simple and very flexible form. Once processed, visitors receive an email to confirm their visit. Also, visitor nametags are printed automatically at reception. This is a seemingly simple workflow that limits the employee's effort, expedites the visitor's registration, and ultimately makes the visit more pleasant.

1. **Registering the visitor:** Radio buttons let users choose whether they are registering the visitor to visit themselves or someone else: *Jeg registrerer pa vegne an noen andre* (I register on behalf of someone else). This helpful feature lets assistants (or other colleagues) register guests.
2. **Choose reception / building and date / time:** Users must indicate where and when the visitor will arrive.
3. **Add visitors:** In the *Legg til besokende* (add visitors) section toward the bottom of the form, users enter the name of a visitor (or click a link to add multiple visitors). It's helpful to be able to register multiple people in one form rather than having to create multiple forms; niceties such as this make the DSS intranet pleasant to work with.

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Training Courses

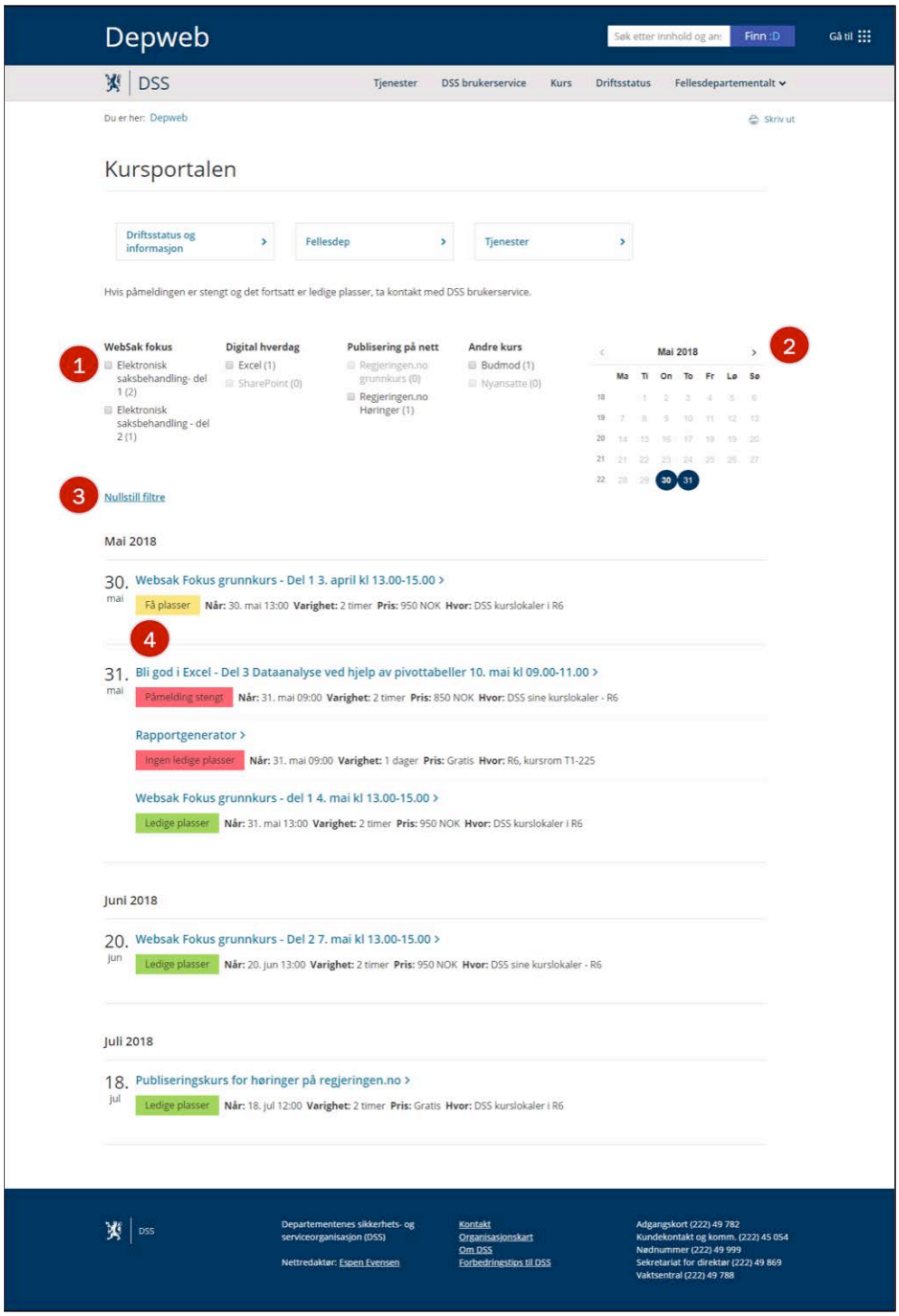


Image 227. Norwegian Government Intranet Training Courses. Users can refine their list of training courses by topic or date.
227_GovNO_23_courses_Live.png

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Training Courses, Highlights

To remain in tip-top work shape, employees are encouraged to participate in training courses. The intranet suggests a list of courses to users based on their affiliation and role.

1. **Filters:** Users can refine their list of courses by selecting a keyword topic. This makes it easy to find training about a particular skill or subject the employee would like or needs to learn.
2. **Date:** Users can also refine the list of courses by month, which helps employees who want training at a certain time to pinpoint an offering.
3. **Reset:** Users can start afresh with the link below the filters, *Nullstill filtre* (reset filters).
4. **Availability:** The red, yellow, and green rectangles by each course listing make it easy for users to quickly see if there is space left in the class. Text labels, such as *ledige plasser* (free seats), make the color-coding unmistakable and also help people who are colorblind.

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Training Sign-Up

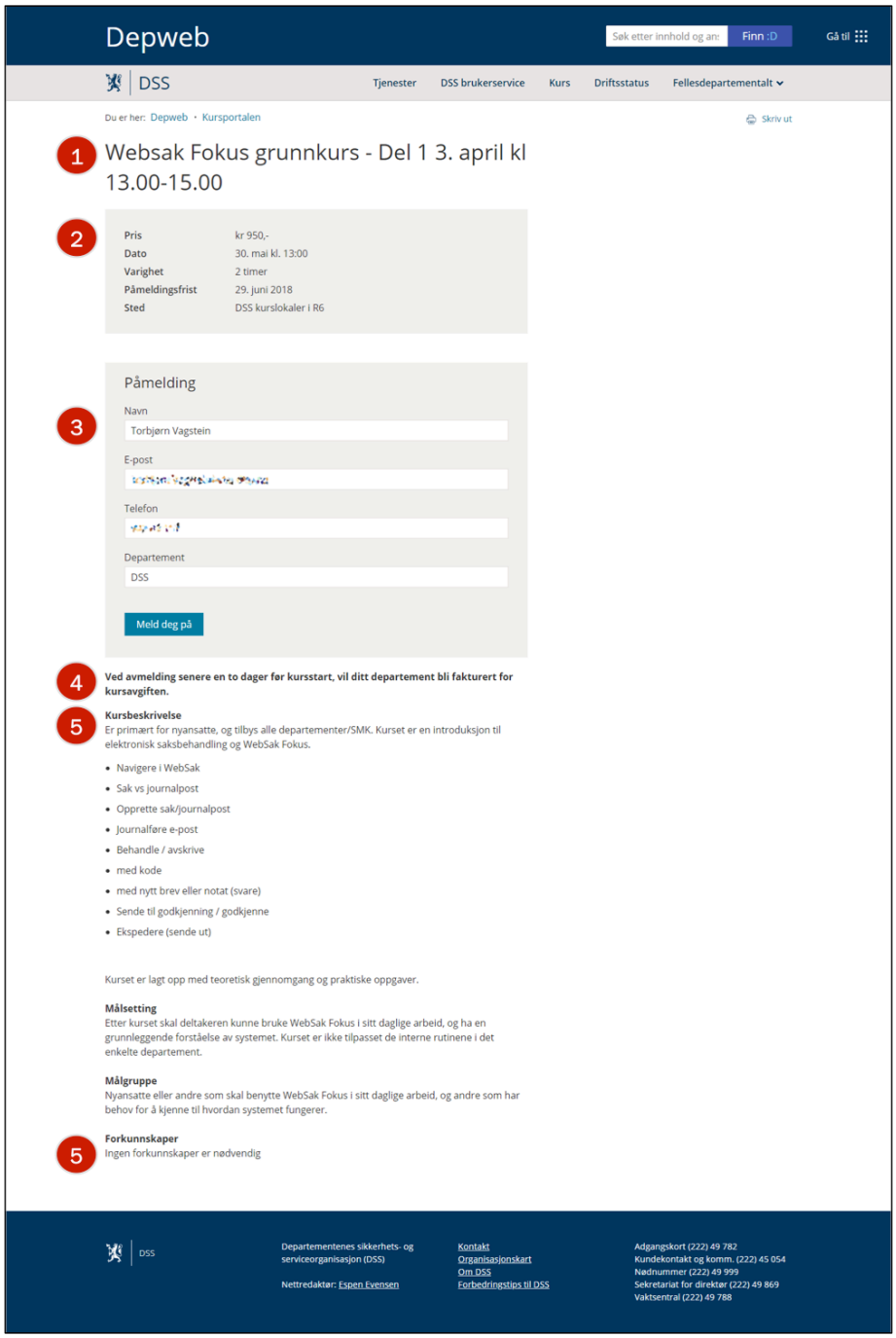


Image 228. Norwegian Government Intranet Training Sign-Up. A form makes it easy for employees to sign up for training.
228_GovNO_24_course_form_Live.png

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Training Sign-Up, Highlights

A form makes it easy for employees to sign up for training courses. Content and logistical details help employees make the best choices and get the most from the training. Once they have signed up, the system sends employees an email and SMS confirmation. Later, the system will email and text them reminders about the course. On the other side of the form, course instructors use built-in tools to track who has signed up, as well as manage participant lists and communicate with attendees.

1. **Course name and date:** It's always helpful to remind users of the name and date of the course for which they are registering.
2. **Logistics:** Logistical information about the course—such as price, date, start time, length, and location—appears at the top of the form. Although users may have already found this information when searching for the course, it helps to confirm all the details at the time of registration.
3. **Prepopulated information:** When possible, the system populates as much information about users as possible, saving them time and avoiding typing errors.
4. **Billing note:** A note under the form warns users that if they cancel less than two days before the course, their department will still be billed for the course fee. It's helpful to know this information at sign-up.
5. **Content-specific information:** Information about the course appears in the second half of the page. The *Kursbeskrivelse* (course description) helps users decide if the training will be helpful for them, while the *Forkunnskaper* (prerequisites) section helps users determine how to best prepare for the training.

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System Status

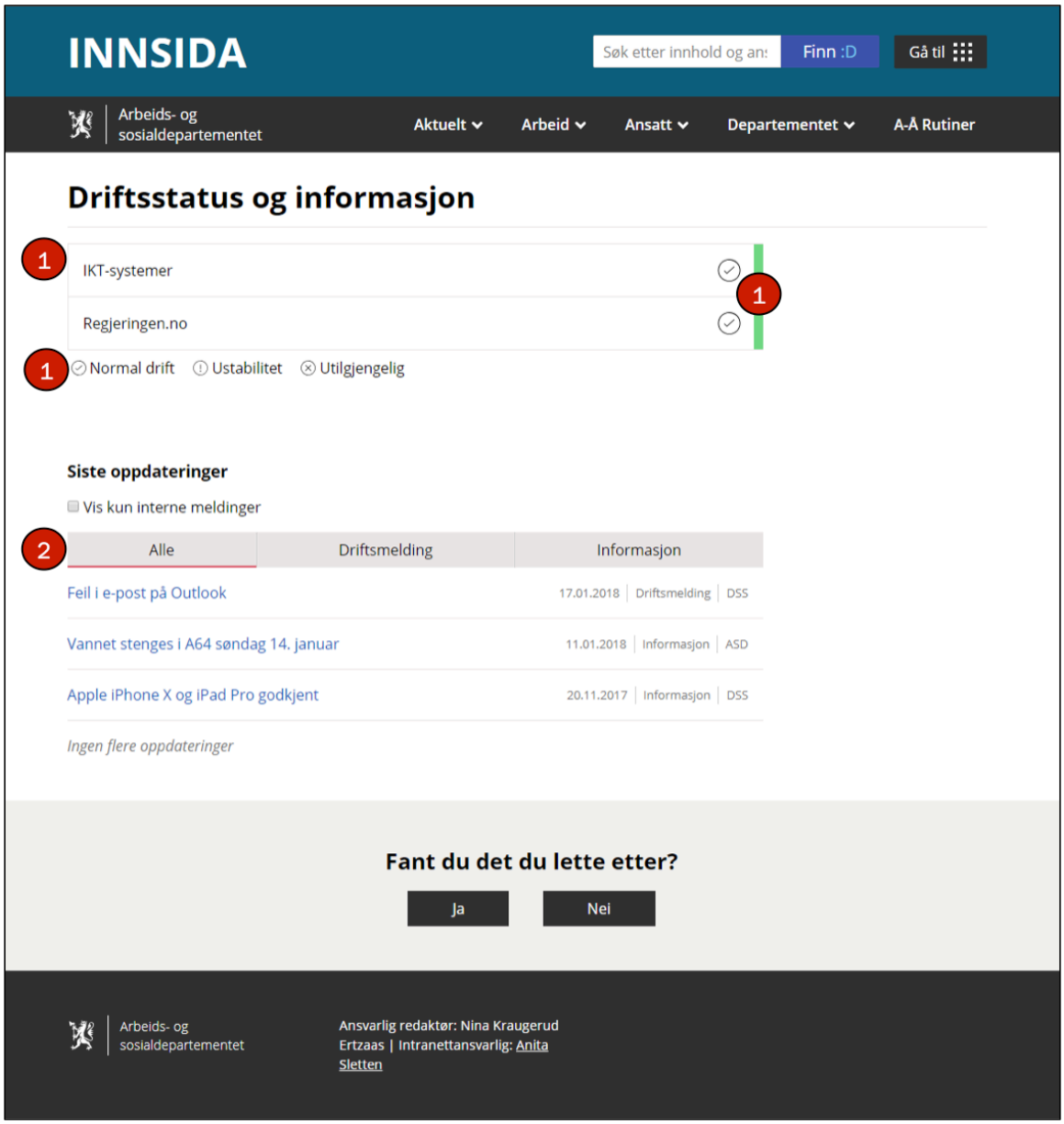


Image 229. Norwegian Government Intranet System Status. A system status page allows employees to learn whether or not their apps are functioning normally. *229_GovNO_25_systems_status_Live.png*

System Status, Highlights

Employees can use system status information to determine whether their tools and applications are working as planned or are having problems. This page prevents employees from trying to use a tool that is currently not functioning. Most intranets have chosen to display highlights from this page on their homepage.

1. **Important notifications:** The status of the most important systems is indicated with an icon. A legend below describes what each icon means: a checkmark means normal, an exclamation point means *Ustabiltet* (Unstable), and an *x* means *Utilgjengelig* (Unavailable). Planned downtime (after regular working hours) is also reported in this section.
2. **Filter:** Tabs let users view the list of system status updates *Siste oppdateringer* (Latest updates) by *Alle* (All), *Driftsmelding* (System notifications), and *Informasjon* (information). The checkbox *Vis kun interne meldinger* (Show internal messages only) lets users filter the notifications.

Urgent warnings: (Not shown in image) The intranet can also display alerts to inform employees about urgent events and emergencies. This is displayed as a red stripe with white text just below the main menu on all pages, with a message such as: “Security exercise today outside building R5 at 17:00—employees are advised not to work late.”

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DESIGN PROCESS AND USABILITY WORK

Casting a Wide Net

Prior to kicking off the redesign project, the intranet team conducted high-level research by visiting public sector agencies and private sector companies to study other intranets both in Norway and abroad. The team also studied Nielsen Norman Group's Intranet Design Annuals to gain useful and interesting perspectives. Before development began on the new intranet platform, the team used a variety of methods to thoroughly evaluated the old platforms (Depweb and the intranet).

Involving Users at Every Stage

User surveys, user interviews, web analytics/statistics, and heuristic expert analysis were among the primary research methods used to inform the new design direction. All such research pointed to one important finding: employee search and organizational structure were the top priorities to add value through the redesign. The team gave these areas high priority when it began developing the new search, navigation, and specialized intranet functionality.

Another highly requested function—which existed in simplified form on the previous intranet—was a searchable A–Z list that included most services and key information. This list served as a third navigational tool, as an alternative to regular search and menu navigation.

Throughout the development process, representatives from the individual ministries provided input on the new design. Editors met with the core DSS team members regularly so they could keep them informed and let them provide feedback and influence decisions at the earliest possible point at each step in the process.

The team gave editors and select users access to the platform, which allowed them to test functionality and UI aspects as they were being developed. Frequent rounds of user testing confirmed that the right design choices were being made along the way. They also helped the team solve vexing design issues; by user testing different alternatives, the team could use the results to establish consensus around issues that were initially difficult to solve. Observing users proved to be most efficient aid in identifying the real problems. Seeing is believing!

For example, in the first round of design for the new platform, the homepage was more task-oriented, allowing room for just a few news articles. The ministries insisted on more space for news, however, pointing to demands from users and management. Hence, the homepage was redesigned to provide more space for news articles, with the option of exposing two or five highlighted news items, in addition to a news list. Based on user behavior on the old platform, the team also decided to rewrite a lot of the old content (excluding news articles, which were transferred to the new platform verbatim), as the new design demanded a new way of organizing the content.

Saving Time and Money by Leveraging Institutional Assets

One of the main tasks of the DSS web section is to provide services and support for regjeringen.no (government.no), the external website for the central government

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and the ministries, so the team wisely decided up front not to reinvent the wheel. Reusing elements of the external site for the intranet platform was considered critical as it would save a lot of time and money, offer a familiar UI for both users and editors, and help ensure compliance with accessibility standards. Although many designers prefer designing something new and fresh, this design team had a strong desire to reuse conventions and standards rather than create something stunning, expensive, and potentially difficult to use.

So, in collaboration with the ministries, the design team decided to reuse design elements and templates from regjeringen.no, saving on development cost and time.

Designing in Agile Cycles

The team's development approach was to work lean and Agile. New versions were launched every month during the development period and then continued through the launch of the first intranets. These cycles were driven by insights gleaned from frequent usability testing of new features, along with statistical analysis of user patterns as the sites were launched.

Giving the Right People Seats at the Table

The design process benefitted from the expertise of professionals both inside and outside the organization.

The internal design team consisted of highly experienced professionals whose expertise weighed heavily in conversations with editors and users. Further, Funka, a company specializing in accessibility, reviewed the platform before and after launch to ensure quality and universal accessibility.

Designing a New Information Architecture

The previous intranet platform's IA had been based primarily on a common IA and main menu structure that was used on nearly all ministry-specific sites. This approach was functional, thoroughly tested with users, and was therefore a good starting point for the new structure's design.

The process of developing that new structure began with workshops with the ministries, which led the team to make adjustments to the old IA. The proposed new IA was then tested with a small user group using card-sorting tools. The workshops, card sorting, and testing led to a design change that reduced the main menu from five to four elements; the team also agreed to offer an A–Z list that would include content from all areas.

The final IA design thus combined design ideas from the individuals who had created the old IA 10 years before, user feedback, and modifications made by new, highly skilled and experienced team members.

The new design's megamenus have been well received, as shown through data from usage statistics and user tests. The waffle menu—a simple square filled with rows of dots in the upper right, which ties together the intranet and collaboration platforms—has not been quite as successful. Many users don't even see the menu at all, and the functionality it contains and its naming conventions do not seem intuitive to most users. It will need more work going forward; this is perhaps okay, because the team

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considers the IA as a whole a work in progress. It continues to adjust the IA based on results from ongoing user tests, usage analysis, and other research. This commitment to refining and optimizing the IA over time shows the importance the team places on its function, which is crucial given that the organization's users have a strong tendency to use menu navigation, list pages, and links rather than search.

Adoption and Buy-In

The intranet team makes an effort to build excitement each time it launches a new ministry intranet, accompanying each rollout with quizzes, gifts, and launch celebrations that include coffee and cake.

Prior to each launch, users are informed of what's coming through meetings and intranet articles. Some ministries hold naming contests to generate interest and underscore the point that the new intranet is not simply the same old intranet in a new wrapper.

Once a ministry intranet is up and running, top managers use blog posts to convey news exclusively through the intranet, rather than through email. This is a good way to force users to regularly check the intranet homepage. New rules that restrict the use of mass emails to convey information also help encourage intranet use. And each user's desktop is set up to launch the intranet homepage by default.

One lesson the team learned about how to handle launches involved when and how to shut down the old sites. At first, the organization allowed users to access the old intranets for several months after a new platform launched. This caused some problems, however. The approach was originally intended to provide a safeguard in case a rush-to-launch stranded any important information on the old platform, but users continued to use the old platform much longer than intended. Having access to the old intranet reduced some of the positive effects of a clean break from the old platform with its cluttered interface and outdated content.

WORKING WITH OUTSIDE AGENCIES	
Agency	**Project Role**
Creuna	• Research and discovery • **Analysis, conceptual design, interaction, and visual design:** Having provided many of the same services during development of regjeringen.no, Creuna's knowledge and familiarity with the government platform greatly aided development
Epinova	• Back end (CMS, databases, migration) • Front-end coding
Funka	• Test and verify usability and accessibility design, and suggest improvements
PuzzlePart	• Implement Finn :D search based on SharePoint search

GOVERNANCE

DSS provides a wide range of services to the various ministries. The common external internet platform for the ministries (www.regjeringen.no) has been DSS's responsibility since 1995. In 2007, during the site's major redesign and technical upgrade, the ministries were deeply involved in design and implementation. This process led the ministries and DSS to look more closely at the plethora of independent intranet platforms that the ministries were using at the time. This led DSS to develop a common intranet platform in close cooperation with the ministries, and a majority of them adopted that platform in 2008–2009. Since then, the platform has been continuously upgraded and developed, with DSS responsible for it and the overall design, while the ministries have done all content publishing.

Coordinating efforts and standardizing the platform has cut costs dramatically and led to a process of continuous development rather than undertaking large projects to create and launch new platforms. The most recent upgrade, however, was larger and more complex than the regular upgrade process because the technology, UX, and functionality all needed a major overhaul. DSS took ownership of this process, while cooperating closely with ministry intranet editors and other stakeholders. The new platform also includes subsites, with content owned by specific ministries. These subsites are coordinated by DSS and offer information to all ministry employees.

Balancing the needs and wishes of intranet users and owners—while still trying to meet management demands and adhere to UX best practices—is a delicate task, but DSS has somehow managed to win and keep the trust of the ministries, which generally accept and advice and suggestions offered by DSS (and external consultants working for it). Financing, however, is a never-ending challenge, as DSS has no budget to pay for the intranet platform, but rather is dependent on the ministries to pay for their services and those of necessary consultants.

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INTRANET TEAM RESPONSIBILITIES	
Role	**Responsibilities**
DSS Intranet Team	• Handle governance, user research, usability, coaching, and intranet editor support • Oversee continued platform development and refinement • Manage content and features available to be shared across intranets
Depweb Team	• Responsible for common content and news, and promote DSS services on Depweb, the common extranet
Ministry Intranet Teams (12)	Manage individual ministry intranets and provide oversight for: • **IA structure:** Adapt features provided by the DSS intranet team to suit individual ministry needs • **Content:** Control content and features available on the ministry level, and reuse common content elements • **Access control:** Manage access control for content with restricted access and provide access across ministries • **Content owner support:** train and support local content owners
Content Owners (locally in ministries)	• Create and update content, and control consistency across specific areas
Search Guru	• Check search logs, monitor user response, refine search, and suggest new features
Tech Team	• Develop new functionality, fix bugs, and ensure high uptime and good performance

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URL AND ACCESS

ACCESS INFORMATION	
Item	**Status**
URL	intra.dep.no: This URL directs users to the homepage of the ministry or organization where they are employed.
Default Status	The homepage is the start page in standard browsers installed on the users' desktop. Users cannot change the homepage, but they can use other nonstandard browsers that do not have this homepage as the default.
Remote Access	The sites may be accessed remotely via VPN. Windows 10 clients use Direct Access for seamless access. ADFS is used for authentication. Mobile access to the intranet is handled by MobileIron/Web@Work to ensure secure access to internal systems. Intranet use on mobile is relatively limited so far, but has proven to be very useful in specific situations for some users.

TIMELINE

PROJECT MILESTONES	
Milestone Date	**Milestone Description**
Late 1990s	• First ministry intranets were hosted by individual ministries and did not share a common platform
July 2007	• First common intranet platform for the ministries
2010	• Upgrade CMS and new version of EpiServer
January 2016	• Recent redesign project start date
February 2017	• Internal launch of the new platform (first version) for intranet editors • Content production on new platform starts
March 2017	• Launch of the Depweb extranet, the first site on the new platform
May 2017	• Launch of DSS intranet, the first intranet site including the Finn :D enterprise search
August 2017–March 2018	• Launch of Ministry intranets
2018	• Launch of new releases every month based on usability testing and stakeholder needs • Some core functions (organization maps, search suggestions, etc.) have been released since the first launch, based on user demands and research
Overall redesign timeframe: 2 years	

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CONTENT AND CONTENT CONTRIBUTORS

CONTENT DEVELOPMENT AND OVERSIGHT	
Contributors	An editor and a team of content owners handle the content on each ministry intranet. The teams generally comprise 7–10 members and meet weekly. Being an editor may be a full or part-time job, but for content owners, the intranet is always only a part of their job description.
Training	Regular courses are offered for contributors. Updated user guides are available on the Depweb extranet; these guides might be in the form of online guides, downloadable PDFs, videos etc. More in-depth guides for particular functions are maintained as separate documents, usually as PDF files.
Encouraging Participation	Upper management encourages participation, and getting users to contribute is not typically a problem.
Maintaining Quality	Content quality is assessed through user surveys. Content owners also get feedback directly from users through the site's feedback tool. During the design process, DSS arranged open houses for all of the editors in the ministries. These meet-ups were intended to help coach and train the editors, and to encourage them to work together and share good ideas. Open houses were also used as an opportunity to discuss new templates and share best practices.

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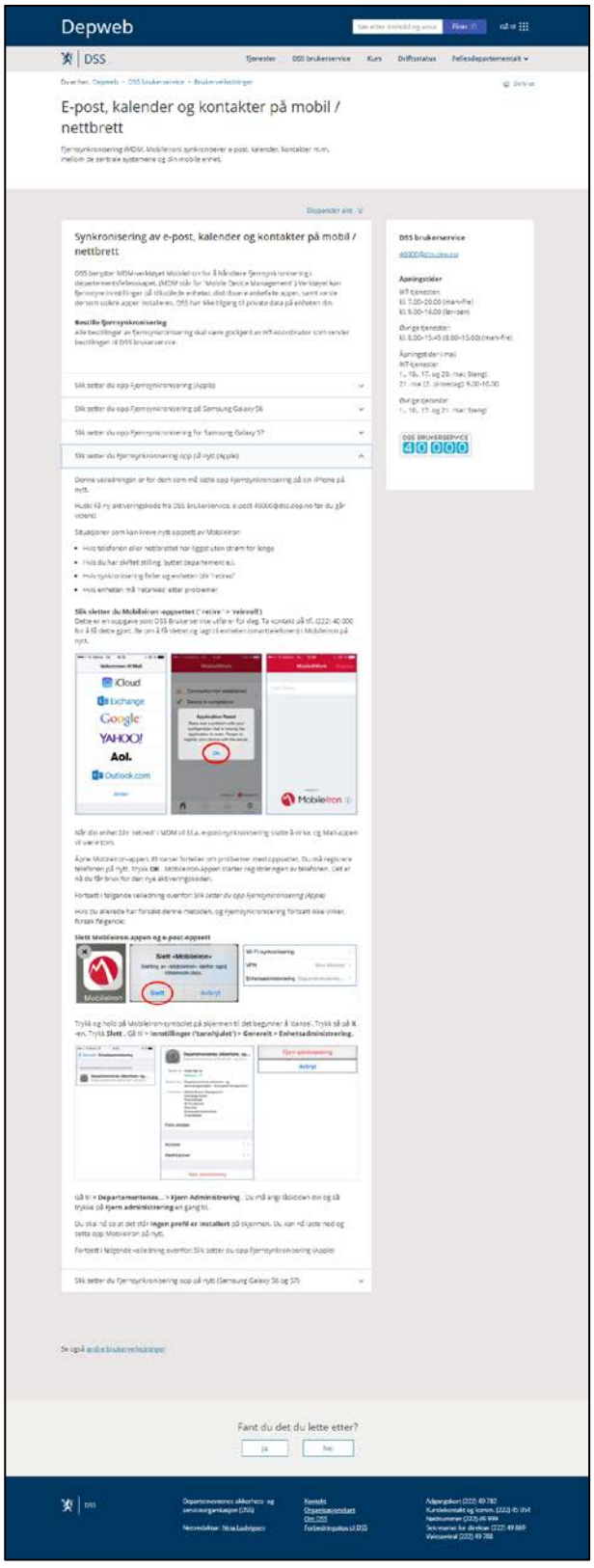


Image 230. Norwegian Government Intranet User Guide. User guides are written in MS Word. The system converts the files to XHTML and displays the guides as expandable sections. *230_GovNO_26_howto_Live.png*

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Culling Content

The old platform contained thousands of articles that had long since ceased to be useful. In many cases, the number of pages was simply a consequence of a platform having been in continual use for a decade.

Because both the new and old intranet platforms were built on EPiServer CMS, migrating content from one platform to the other was straightforward. This could easily have led ministries to import pretty much everything, rather than take the opportunity to cull content and start fresh with a leaner, more focused content base. Thankfully, that's not what happened. Most ministries reduced the amount of content substantially and avoided excessive import from the old platform. In fact, one ministry cut more than 90% of its content.

All ministries deleted a large amount of content or rewrote it in a more user-friendly format. Because the new templates were designed with short, focused content in mind, some rework before migration was essential, regardless of the content or its source.

The team took a methodical approach to deciding what to do with old content. It first got an overview of the old platform, then categorized which content should be deleted, updated, or reworked. Site statistics helped the team identify content with low use and provided pointers to content that would require rework.

The Pros and Cons of Allowing Access to Old Content

As a safeguard, the team made the old intranet and old content available to users for at least several months after launch. Having access to old content—and even being able to link to it (though this was discouraged)—made it easier for editors; if they elected not to migrate a page, they could always migrate it later if it proved valuable.

The drawback of allowing access to the old sites was that it bred complacency. Pages and functions on the old intranet platform remained in use for far longer than intended.

On the flipside, however, intranets that reworked all of their content and focused on having fewer, more-to-the-point pages were rewarded with consistently better feedback from users.

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TECHNOLOGY

TECHNOLOGY	
Category	**Technology Used**
Web Server Hardware and Operating System	• Operating system: Microsoft Windows Server 2012 (64-bit) • Virtual servers: VMware ESXi, 6.0.0, 8934903 • Servers: VMware HP ProLiant DL380 Gen9
Bug Tracking / Quality Assurance	• Jira • Confluence • SharePoint collaboration rooms
Design Tools	• IA and wireframing: Axure RP Pro, Adobe XD • Photoshop
Site Building Tools	• Visual Studio 2017 v15.7.4 • Octopus Deploy 3.4.13 • TeamCity 2018.1 • .NET 4.6.2 • node v4.6.1 • npm v2.15.9
Content Management Tools	• EPiserver CMS v11
Search	• SharePoint 2013
Other Functions	• Matomo (statistics and search logs)

Technology Evaluation

The *regjeringen.no* project experiences pointed to the potential benefits of offering one platform to all ministries, and it was natural to reuse that external site's technology solutions. DSS is now seeking to standardize the technical platform and suppliers for all web solutions and services to enable reuse of solutions and to optimize resources and competence.

In 2006, when a platform consisting of EPiServer CMS, FAST ESP search, and TM Core Topic maps relational engine was chosen for the external site, the main criteria were:

- Platform and components should be technologically mature and offer the necessary functionality with a good user (editor) interface

- Platform and components should come from suppliers of a certain size, with a good probability of market survival and strong representation in Norway
- Platform and components should be offered and supported by professional agencies with a reasonable market share and life expectancy, ensuring long-term access to implementation services independent of a single supplier

At the time, EPiServer was (and still is) a very strong player in Norway's CMS market; it had a large user base and many highly professional agencies offered implementation services. Although the team considered open source solutions, none were considered technologically mature or sufficiently established in the market.

The team chose FAST because of its strong technology and good presence in Norway. To implement Topic Maps, the team found TM Core to be the only realistic alternative; although it carried a considerably higher risk than other components, the dependency on it was less critical, so the risk was accepted.

The intranet went through several technology upgrades and visual/UX redesigns. However, it was still based on the same technical platform when a project was started in 2016 to revise the concept, design, UX, and technology for the whole platform. Meanwhile, regjeringen.no had undergone a total redesign, and a new technical platform had been built. It was an obvious choice to reuse as much of that new platform as possible, because both regjeringen.no and the intranet platform are among the most important services offered to the ministries. The platform chosen for version 4.0 of regjeringen.no launched in December 2014 after more than two years of work and included the following:

- EPiServer CMS as the main platform and publishing interface (upgraded to the newest version)
- EPiFind (based on Elastic search) for search functions and search-based content retrieval
- Relations for EPiServer, a third-party add-on to EPiServer was chosen as a substitute for TM Core. Topic Maps had been abandoned, but extra functionality to handle relations between pages and objects was needed. With the help of developers, this EpiServer add-on was streamlined to fit the organization's needs.

When the intranet project began in 2016, there were three main options:

- **Be thrifty and efficient:** Use as much of the new regjeringen.no platform as possible.
- **Follow the pack:** Switch to SharePoint.
- **Be pragmatic:** Use something old, something new, something borrowed, and something blue.

The team chose the third alternative: pragmatism.

The team realized that, in an environment where SharePoint was already being used as a collaboration tool and storage platform, it would be unwise to implement a search platform that could not handle all of the relevant content. And, since

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SharePoint content is notoriously difficult to index and search using anything other than SharePoint Search, the team set up a pilot project to test SharePoint search. It integrated EpiServer content with the SharePoint search solution using the Search Indexing Toolkit that Microsoft provides to some of its partners. The toolkit defines a standard interface for delivering content to the search solution, including access control to the indexed content. When needed, the same mechanisms can be used for future content sources, such as the document management and archiving system.

Based on the pilot, the team concluded that SharePoint search had its quirks and implementation difficulties (especially handling access rights for non-SP content), but it would be the best choice for an enterprise search platform, and implementing search would be the first step.

Keeping EPiServer as a CMS and publishing platform was a relatively easy choice. After listening to experiences and lessons learned from other public-sector organizations, it became clear that SharePoint *could* be transformed into a solution that would meet users' needs. However, doing so would be costly, time-consuming, and risky, as custom solutions built on the SharePoint platform are known to be difficult to upgrade. Further, many of the intranet editors in the ministries are also responsible for external publishing on regjeringen.no, so giving them a well-known tool—and a competent organization to support, maintain, and further develop a stable platform—seemed like a good idea.

So, the EPiServer and IA could be seen as the "something old." SharePoint search, the concept, and the visual design were something new. And a lot of the functionality, interaction design, and resources—both in-house personnel and external consultants from the regjeringen.no team—were borrowed. And as for the *blue*? Team members joke that Microsoft tends to use a lot of blue, especially in SharePoint components, so they were covered.

MOBILE

The design team decided to use a fully responsive design, adapted from the regjeringen.no project. All intranet content is available on mobile, but the element sequence and placement may be changed. All employees who use *Mobile Iron* can use all intranet services. The search experience is not quite ideal; limitations in SP 2013 make it too costly to build a responsive search. However, this will be remedied as part of a SharePoint upgrade.

Users have not expressed a strong need for mobile access, and most ministries have not been very active in promoting it. That said, there is a growing use—especially on tablets/pads, which some people are using as an alternative to portable PCs in meetings and other out-of-office situations. Serving these users, and those using iPhones or Android smartphones, is considered important, as the use and usefulness of these devices is steadily increasing.

ROI

The Challenge of Measuring "Success"

In the initial phase of the redesign process (after changing the scope to provide a unified solution), the team identified and documented potential benefits in a *Benefits*

realization plan. This document was intended to provide direction for governance and further development, and it described potential benefits in terms of both hard numbers and softer measures, such as higher user satisfaction.

There has been a strong desire at DSS to use metrics and hard data to assess the platform's success, as well as to find relevant tools to accomplish those measurements. However, measuring intranet success entails great challenges. For example, all ministries have defined the intranet as the default browser start page. This creates traffic that has little value, unless the users actually read content on the front page or begin navigating or searching to provide a click stream.

Thus, so far, the user stats have not indicated any big increase in general use, but some trends are clear, including a significant increase in:

- Visitors to the Depweb extranet
- Visitors to shared content and system status
- The number of sign-ups for courses

In addition to central measurements provided by the DSS team, the ministries generate reports on the most-used pages. In these reports they point out the most popular news items and use of tools, and other general information. This information can help the teams create better content aimed at satisfying users' needs.

Applying Metrics

Despite the challenge of measuring exactly what success means, the organization recognizes that great strides have been made with the intranet redesign, with benefits that include:

- **Reduced costs**
    - **Common platform:** Hosting all of the intranets on a common platform has greatly reduced costs; the savings on licensing alone amounts to roughly $30,000 USD per year.
    - **Improved accessibility:** The importance of providing the best possible usability and accessibility has permeated the project from the start. While providing good usability and accessibility is an obvious target for any site (intranet or internet), accessible websites are now mandated by law in Norway and site owners can be fined for noncompliance. The project hired accessibility experts from Funka to ensure high-quality accessibility. And, because the platform in under constant development, Funka now conducts regular accessibility checks and all new functionality is tested for accessibility. DSS sites now have a strong reputation as examples of good accessibility, which in turn makes the sites friendlier for all users.
- **Time savings:**

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- **Pooling resources:** Pooling development and maintenance resources means that each intranet site is kept up-to-date for a fraction of the cost of updating each site as a separate instance.
- **Content sharing:** Content sharing and collaboration among editors saves time for the ministries, providing increased quality for less cost.
- **Enterprise search:** Having an intranet with good enterprise search results saves time for all employees, allowing them to find needed content and helping them perform tasks more efficiently.

Measuring the Impact of Improved Search

Knowing that improvements in search functionality greatly impact use and the quality of intranet usage overall, the team set out to ensure that search reporting was of the highest possible quality.

Initially, the team relied on SharePoint's standard statistics reports. These reports present usage patterns for search, abandoned queries, and zero-result queries, but the team found that these reports needed a lot of post-processing to offer any value, and it eventually decided not to use them. Instead, it presented a summary of findings from these reports, supplemented with the search manager's interpretation of the data.

The major issue with the standard SharePoint reports was that they could not be broken down by ministry. So, to provide editorial group members with additional data on search usage for their specific users, the intranet team added Matomo, a JavaScript tracking API, to the search solution. When it introduced Matomo, the team also created a generic search dashboard for each member of the editorial group.

Although the organization does not formally report on KPIs, search is the exception. To measure search KPIs, it has established a framework inspired by ideas presented in Louis Rosenfeld's book *Search Analytics for Your Site*. Currently, the team monitors generic search usage patterns, trends in abandoned queries, zero-result queries, relevancy trends for the top 30 popular search terms, and precision trends for the top 30 popular search terms. These KPIs are part of a monthly presentation to the editorial group, which includes results across the following search areas:

Since launch:

- Trends in relevancy
- Trends in precision
- Queries per month
- Average query length per month
- Average number of terms per query per month
- Trends in abandoned queries

- Trends in zero-result queries

Previous month:

- Number of queries per search tab per day
- Unique users per day
- # of queries per user, per day
- # queries per 25 most popular topics
- Recent trends in query terms, with content suggestions
- Top 10 abandoned queries and zero-result queries

Last three months:

- 25 most popular topics per month

Softer Measures

Content quality is assessed primarily through feedback generated from an intranet form and, for now, this feedback is not quantified. However, the team plans to quantify the feedback in the future, and also to set goals.

The practice of frequent user testing—both of new features and of the intranet as a whole—will continue. Several ministries are also conducting user interviews or using questionnaires to track user response, but these efforts have not been summarized yet.

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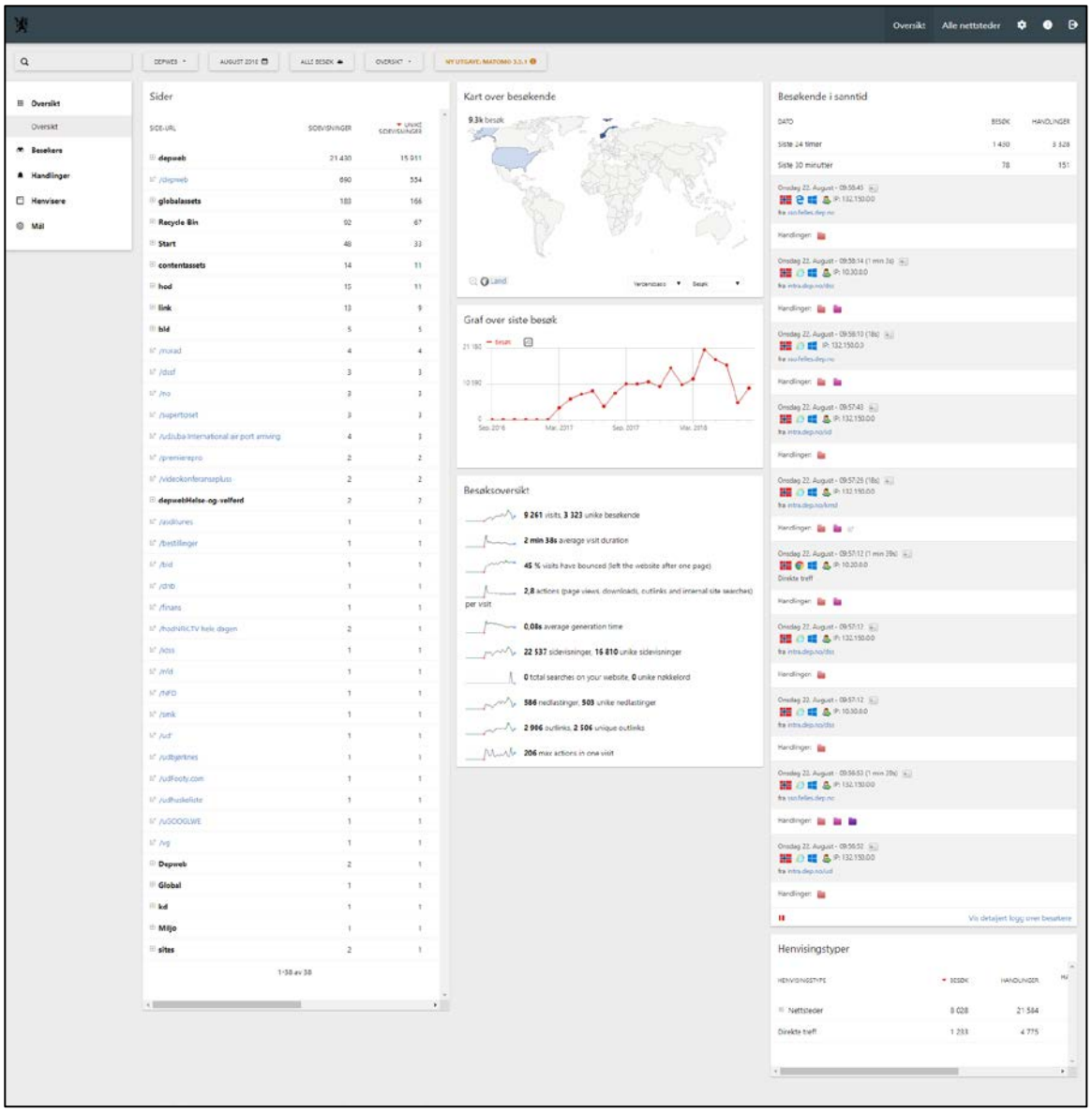


Image 231. Norwegian Government Intranet Analytics Tool. Matomo collects and analyzes traffic from all of the intranets on the platform. Each editor has access to information on her or his intranet. Administrators can access data on all intranets and crunch the numbers to create aggregate views into the data. *231_GovNO_27_statistics.png*

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Image 232. Norwegian Government Intranet—Improving Search. The enterprise search portal is closely monitored to improve search precision and relevance. This image shows two pages from the periodic report produced by the search manager. These two pages illustrate (from top to bottom, left to right): trends in relevancy, trends in precision, average number of terms per query per month, trends in abandoned queries, and trends in zero-result queries. *232_GovNO_28_search_QA.png*

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LESSONS LEARNED AND BEST PRACTICES

After the new intranet launched, members of the intranet team and intranet editors in the ministries were asked to identify the project's successes and areas that needed improvement. The most important result that emerged was that everyone was happy with the new intranet platform. Also, satisfaction was high related to governance, continuing development, and the team's commitment to conducting user tests and issuing new releases every month.

But, for all of the positive feedback, these surveys also revealed project shortcomings, which the team took to heart and other teams can learn from.

Lessons Learned

- **Be specific with specifications.** "The intranet team could have been more precise when specifying tasks sent to developers, potentially saving time and cost on superfluous meetings. Using Scrum/Agile methods, the development team of three felt that only one product owner responsible for specifications was insufficient. More team members should have worked with stakeholders and users to specify the design details and new functionality. Also, staff members of the team changed a lot during the development period. Skills and knowledge were not always on the required level, and this caused delays in the process."
- **Don't overlook training.** "Some editors wanted more training and courses to adapt to the new platform. The needs for training vary a lot. It is a challenge to satisfy all needs when time, money, and resources are limited. However, the concept of 'open house'—where intranet editors and DSS team members get together on a regular basis to go through new concepts and functions, and work on content—has proved to be an excellent platform for sharing knowledge, defining best practice, and helping each other."
- **Sometimes functionality can change culture.** "In the new intranet platform, employee search was a part of the enterprise search (Finn :D). Previously, employee search was a unique search function with its own specific interface and functionality. Introducing an entirely new search concept caused some resistance, as users of the old version were used to certain tools that no longer existed. These users particularly missed being able to create lists of employees that could be easily pasted into Excel for further use. This was considered to be out of scope for the new search project, but it is very likely that as part of the post-launch development activities an alternative search display will be developed to meet these requests.

  "The old employee search was mainly directed at finding people in your own ministry, with a different search for all ministries, with limited information. The new Finn :D search made all ministry employee information available to everybody, and this challenged the culture in the ministries."

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- **If you build it, they may not come, so plan accordingly.** "Users in the ministries are generally employees with good education and high professional skills, and a strong sense of pride in the work they are doing. However, many of the most experienced employees have fairly low skills and interest in adopting new technology, and this causes some challenges when introducing new systems. Also, it can be difficult to motivate users to fulfill tasks for which they see no direct benefit for themselves. An example is updating personal profiles with experience and work tasks. Lack of data for many users reduces the value of the employee search and the possibilities of finding resource people, thus leading to less frequent use of employee search."

Best Practices

- **Identify opportunities and change direction if you need to.** "In the initial phase of the design process, the scope was to upgrade and redesign the intranets, without changing the concept of separate intranets. Enterprise search and shared content between extranet and intranets was not within the scope of the project, and budget and deadlines were set accordingly. However, after seeing results from insight and research work, and wishing to fulfill requests from stakeholders (in the ministries), it was decided to widen the scope of the redesign process to get a platform that would serve users better, and save resources in the long run. More funding was provided and deadlines extended, all in collaboration with management and stakeholders."
- **Work lean.** "During development, we used Prince II, Agile, and Scrum methods, with releases every month. Intranet editors had access early on, allowing for user testing and dealing with requests from the very start. In the process, we used insight, research, and analytics (metrics, KPI) to adjust and improve. We also arranged frequently user tests, often on smaller groups for easier administration. This proved to be very helpful in the process of achieving a user-friendly intranet. After launch, it was user tested and improved a dozen times."
- **Create opportunities for collaboration.** "Previous experience from the *regjeringen.no* project had indicated that regular 'open house' meetings where all editors could meet DSS team members (an, in some instances, external consultants involved in the project) to go through new concepts and features, and work together on concrete content production and problem solving, had been extremely useful. Throughout the intranet development period, open house meet-ups were held biweekly (or weekly), so that editors got accustomed to the platform and could get mutual help in creating good content."
- **Don't try to reinvent the wheel.** "In general, reusing design, concepts, technology, and methods from previous projects (most notably the regjeringen.no process) was deemed successful, and also caused great savings in terms of money and time to target."

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REGIONS AND COUNTRIES REPRESENTED

The US has a strong showing in this year's annual, with five winning intranets. Two Australian winners grace our report this year, with one winner each from Dubai, Norway, and the UK, rounding out the top 10.

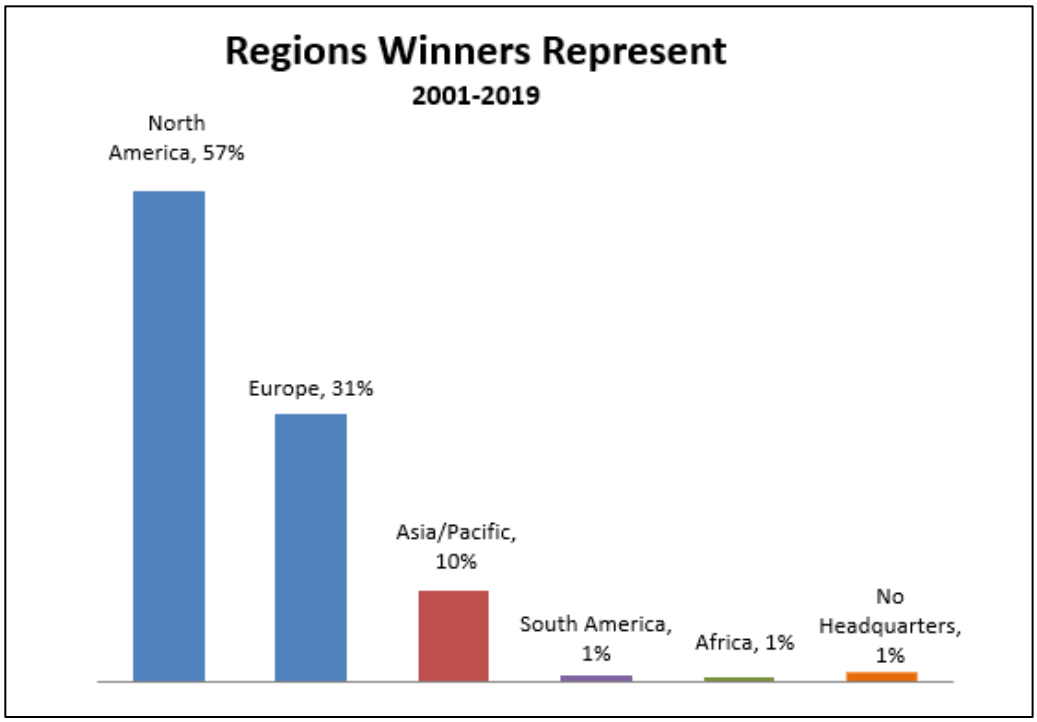
DESIGN ANNUAL 2018 WINNERS BY COUNTRY	
Country	**Number of Winners**
United States	5
Australia	2
Dubai, United Arab Emirates	1
Norway	1
United Kingdom	1

The world regions and respective percentages of winning organizations across the Intranet Design Annual's history are:

- North America (57%)
- Europe (31%)
- Asia/Pacific, including the Middle East (10%)
- South America (1%)
- Africa (1%)

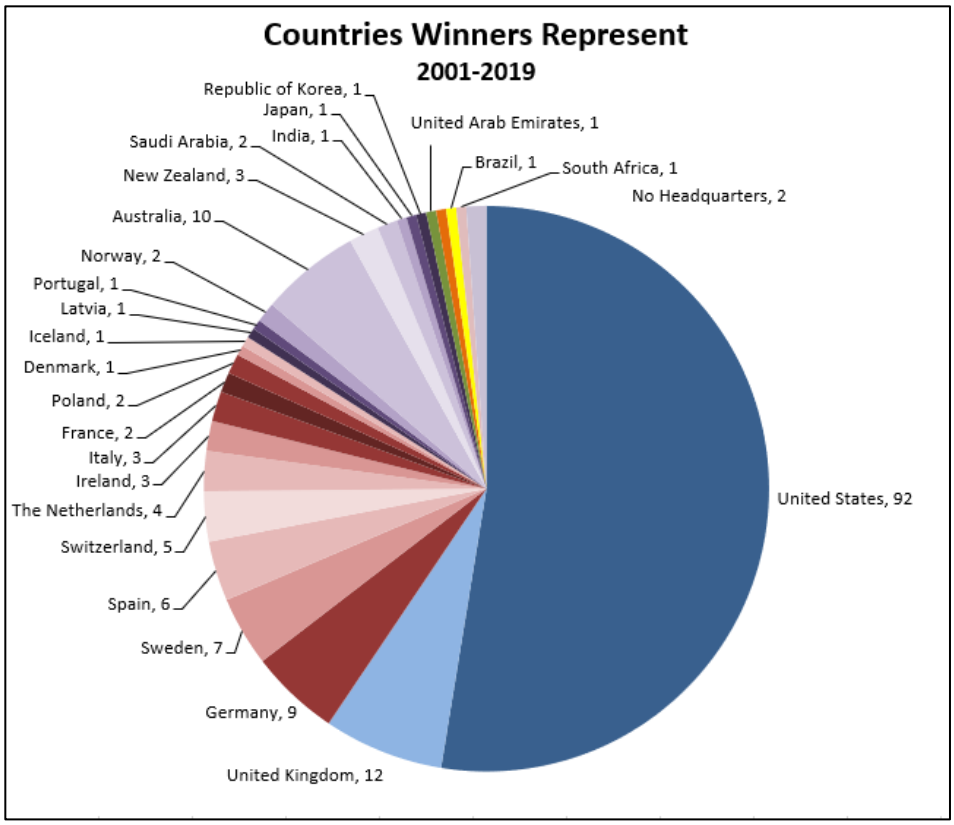
Two organizations, representing 1% of all winners through history, claimed no headquarters. One was a global network of organizations, and the other considered itself global and not located in any specific country.

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Regions Winners Represent: 2001–2019. The world regions and respective percentages of winners across the history of the Design Annual are North America at 57% (108 winners); Europe at 31% (59 winners); Asia/Pacific, including the Middle East, at 10% (20 winners); South America at 1% (1 winner); Africa at 1% (1 winner); and 1% (2 winners) claiming no official regional headquarters.

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Countries Winners Represent: 2001–2019. Winning organizations come from 25 different countries. Moving clockwise from the top, countries are grouped by region as North America, Europe, Asia/Pacific (including the Middle East), and South America.

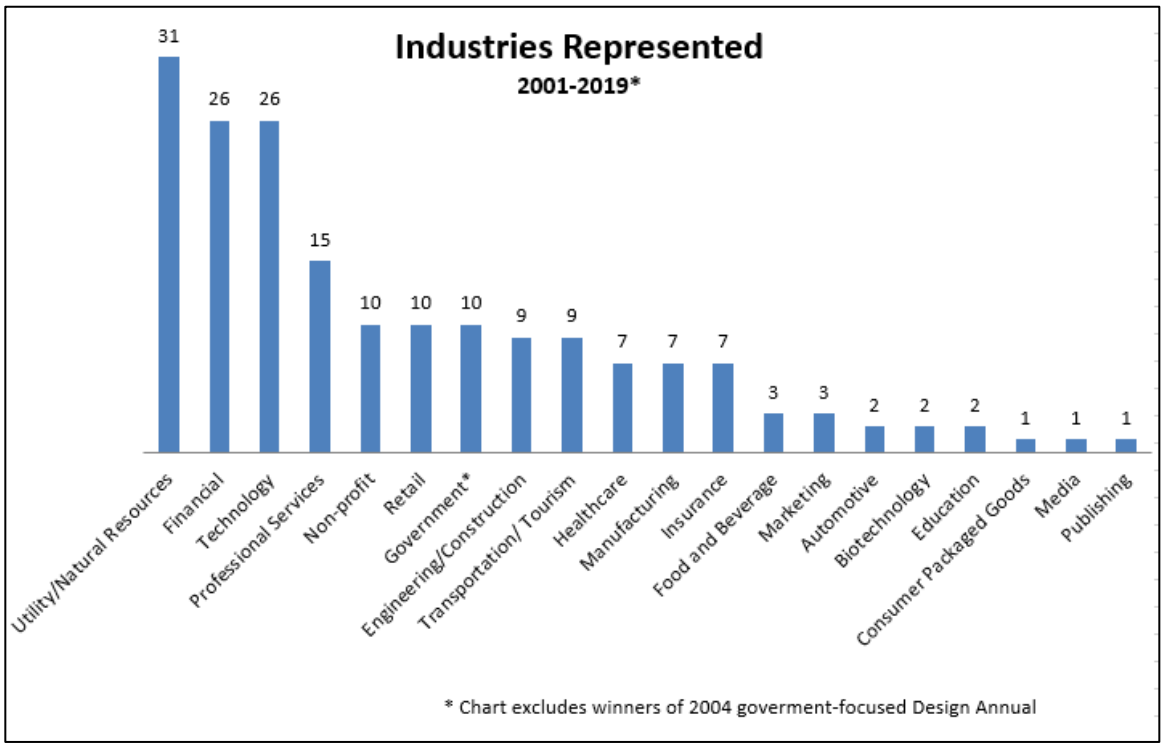
INDUSTRIES COUNTRIES REPRESENTED

This year's winners represent eight different industries. Utilities retain the top spot as the winningest industry, with the financial and technology industries not far behind.

For 2019, the winning industries (and their number of winners) are:

- Utility/Natural resources (3)
- Engineering/Construction (1)
- Financial (1)
- Government (1)
- Insurance (1)
- Manufacturing (1)
- Technology (1)
- Transportation/Tourism (1)

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Industries Represented: 2001–2019. This year's winners represent 8 of the 20 different industries recognized throughout Design Annual history. Over the years, the utility, financial, and technology industries have been the winningest.

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Intranets Not Selected: Common Issues

The intranets in this report might make designing a great intranet look easy. But it is not easy. Ill-equipped teams, missing executive support, lack of leadership and focus, the use of common but bad UX design patterns, politics, technology limitations, impossibly short schedules, and a slew of other issues and distractions often and easily foil intranet teams that have the best of intentions. Negative factors such as these lead to poor intranet design. Following are examples of unfortunate design elements we found among some of this year's non-winning submissions.

"MAGICALLY MOBILE" AND OUT-OF-BOX DEFAULTS

Today's technology world offers many intranet solutions that teams can use to get a jumpstart on their design and code. The default designs in these systems might be stable, but that doesn't mean they have been researched and improved for UX. And, even if they were, it doesn't mean these default designs will work for every organization. We saw many non-winning intranets that simply relied on the system defaults and plugged in their content.

In that vein, some designs were better on desktop than on mobile because they seemed to study and iterate the design for desktop but relied—yet again—solely on system defaults to magically make the intranet responsive. Systems that automatically drop columns and switch navigation links from a desktop-optimized megamenu to a mobile-friendly accordion can be very helpful. However, pages often got arduously long on mobile, and menus sometimes had no visual hierarchy.

In any case, no system can replace the eye of a great designer, custom templates, and iterative usability testing. "Responsive" doesn't mean an intranet is simply "accessible on mobile," but rather that it is (or should be) "accessible, useful, and usable on mobile."

UNHELPFUL OR CLUTTER-CONTRIBUTING ICONS

Icons can help users recognize the associated command, recall what a command does, give a visual break from text, and contribute to the intranet's tone of voice. Clearly, icons can have great value. But too many intranets have icons that are impossible to decipher, overly generic, scarcely related to the commands they invoke, or too similar to other icons in their set.

MEGAMENUS AS PAGES

A major benefit of a megamenu is that users can see multiple levels of links on a single flat 2D UI element. The size of megamenus means that they can fit a lot of content. Megamenus are not limited only to text links, but they shouldn't be a dumping ground for all sorts of content. When the same menu includes a wide variety of items—from text links to large photos to thumbnails of employee profile pictures—they can be hard to scan and use. Users should have some expectation about the content they'll find in a megamenu; to ensure this, apply consistent guidelines about the type of content that should appear and where it should be placed in your megamenus.

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ILLEGIBLE TEXT IN BUTTONS AND MENUS

Following the corporate style guide and using the brand color palette on the intranet are certainly desirable. But do we really have to use small light grey text on a teal or black background? We can find creative ways to use branded color palettes without making text illegible.

ARTICLES WITH NO SUBHEADINGS

Even if the information in text is interesting, articles that are all long streams of unbroken text are hard to scan and can be fatiguing to read. Eyetracking research shows that users scan to headlines. Adding subheadings within articles lets users sample sections so that they can decide whether to read the whole page or move on.

CAMOUFLAGED SEARCH FIELD

Elements that make a search field pop include making it white (or some other light color) on a darker background and leaving it empty. Eyetracking research demonstrates that users scan to open fields when they want to search.

POOR CONTENT PRIORITIZATION

The most important items should appear toward the top of the page and should typically take up more space than less essential things. So, for example, the quote of the day is probably less important than the user's own favorites, so favorites should be higher on the page. The five most recent news stories are more informative than a generic-looking photo for one news story, so the five stories should probably be given more space.

TEXT OVER IMAGES

We like a good meme as much as the next person, but using a photo with text over it is not a highly usable navigational element on an intranet. Putting text over an image often makes it difficult or impossible to see the image and read the text.

LACK OF VISUAL PAGE HEIRARCHY

Intranets this year included everything from a strong grid to cards galore. Following a grid is a good thing, but designers must find ways to integrate visual hierarchy in that grid. For example, rather than just using same-sized rectangles to hold each bit of page content, let some content occupy multiple rectangles while other content uses just one. And cards—that is, a set of same-sized colored rectangles that include text—are one way to punch up an intranet's color scheme. They can, however, be confusing if they house different types of content with different priorities. Using a set of the same cards for a set of application links can be effective. But a set of the same cards for linking to a news story, an app, favorites, and employee benefits can be confusing.

USING FLAGS FOR COUNTRIES

It's not a far reach to assume that employees can identify their own country's flag. But it is a stretch to assume that employees know the flags of many other countries. When noting a country—such as in a time zone chart or when choosing location

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customization preferences—consider whether the country flag will be recognized; if not, add the country's name. Also, when offering the option to change languages, write out the name of the language rather than using a flag, as the language might be used in multiple countries, or the country represented might have multiple languages.

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Selection Criteria and Process

Nielsen Norman Group's Intranet Design Annual rewards great examples of useful, usable intranets that help organizations and meet the needs of people using them. To find these intranets and their teams, we post a call for entries each year in 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
3. In-depth design reviews on the top entries to choose the top 10
4. Follow-up interviews with the top 10

Each step is detailed below.

INITIAL DESIGN REVIEWS AND NUMERIC RANKINGS

Our team of judges conducts baseline design reviews and narrows the field down to tier-one submissions, then narrows that set of designs multiple times to reach the top 10 winners. In the judging process, we rate each site numerically and note any great or missing features and qualities. We base the numeric rankings on criteria typically viewed as key to good intranet design, including elements that have emerged from submissions or trends in previous years. We rate each element in each submission on a scale of 0–5, with 5 being the best rating. Some of the criteria include the following:

Navigation

- Global navigation on every page
- Consistent, easy navigation
- Clear hierarchy
- Consistent style across the intranet
- Horizontal scrolling and swiping used appropriately
- Expected page layout and appropriate vertical scrolling

Design

- Modern, pleasing aesthetics
- Uncluttered but thorough pages
- Clear page hierarchy and priority

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- Brand support (without over-branding)
- Engaging and helpful homepage design
- Good contrast between text and background
- Good use of graphics
- Legible text
- Distinct headings and links
- The right amount of text and links

Search

- Consistently available search
- Employee directory or directory search
- Clear relationship between site and employee search
- Good search design (ideally, a simple open field at the top of pages on desktop and tablet, and a magnifying glass on phones)

Personalization and Customization

- Personalization and roles, catering to different offices or cultures
- Ability for employees to customize the intranet in helpful ways

Information Delivery

- Organization-related news and information
- Information about internal groups and projects

Content

- Well-written text
- Appropriate, engaging tone of voice
- Content management, content curation, and editorial team management
- Information that meets business needs

Collaboration and Social

- Social that is helpful, not just present
- Content posting and editing capabilities for all employees
- Engaging with and sharing content

Desktop and Mobile

- Mobile offerings that are suited to a small screen
- Desktop design that takes advantage of a large screen (and is not simply the same as mobile)

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- Mobile that takes advantage of device features such as camera and location

Overall

- Simple forms
- Support for the main corporate functions
- Encapsulation of the organization's spirit
- Use of innovative, fun, or original features
- Accessible to all users
- Useful mobile offerings
- Originality or "something special"
- Challenges faced compared with output achieved

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About the Authors

Kara Pernice is Senior Vice President at Nielsen Norman Group and co-created NN/g's Intranet Design Annual with Jakob Nielsen in the year 2000.

Kara works with clients in a variety of industries to derive UX strategy and produce designs that meet business goals. In her more than 25 years of experience in UX management, strategy, research, and design, she has led many intercontinental research studies, authored a variety of research reports, and coauthored the book *Eyetracking Web Usability*. Named an "intranet guru" by *The Wall Street Journal*, Kara has lectured around the world on intranets and a wide range of other topics. Prior to joining NN/g, she had gained invaluable experience pioneering UX and building and managing UX teams in diverse development environments, and had established several successful UX programs.

A champion for UX, Kara chaired the Usability Professionals' Association 2000 and 2001 conferences and served as 2002 conference advisor. She holds an MBA from Northeastern University and a BA from Simmons College.

Patty Caya (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 UX (including social media and mobile design) and the business and technology of the web. She has coauthored the Intranet Design Annual for NN/g since 2008. She wrote and edited the report, *Mobile Intranets and Enterprise Apps*, and the 1st and 2nd editions of *Social Features on Intranets: Case Studies of Enterprise 2.0.* She also authored the 3rd, 4th, and 5th editions of the intranet portals report and contributed to the *Application Design Showcase* (2nd edition).

For more than a decade, 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.

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Thanks to Jeanette Pidanick for her assistance throughout the review process, to Susan Pernice for helping us define and refine that process, and to Keri Schreiner for editing this report.

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