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Accelerating Internal Communications

Modern Intranet Best Practices For
the Modern Workplace

Session

Recording: <https://www.youtube.com/watch?v=FPx5jXnGD9M&feature=youtu.be>

Presented by Christy Punch, Wells Fargo

Co-Presented by Timothy Boettcher, AvePoint



Agenda

Why intranets are still relevant today

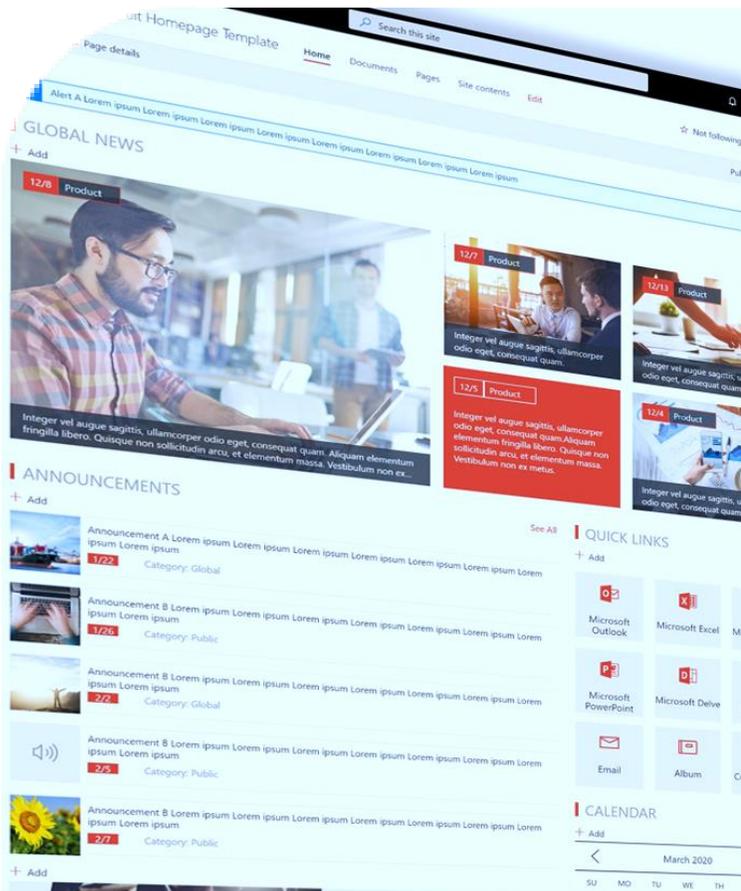
Case Study: The Wells Fargo story

Latest Intranet Innovations in Office 365

**The intranet is dead.
Long live the intranet!**



Intranet Characteristics



It's not Public

Even though it often uses the same technology as *Internet* sites, an Intranet is not publicly available like a regular published website. It's usually part of your internal systems, and excludes outsiders from access.



Different Info and Tools for a different Audience

Unlike your public-facing corporate website, which needs to sell you and your organization to the outside world, and Intranet contains information and tools for your employees.



Communications and Applications

Given the internal-focused audience, Intranets are often used for publishing news and information, policies and procedures, staff and HR information, providing links to other internal systems, document search, calendars, collaborative tools, and more.

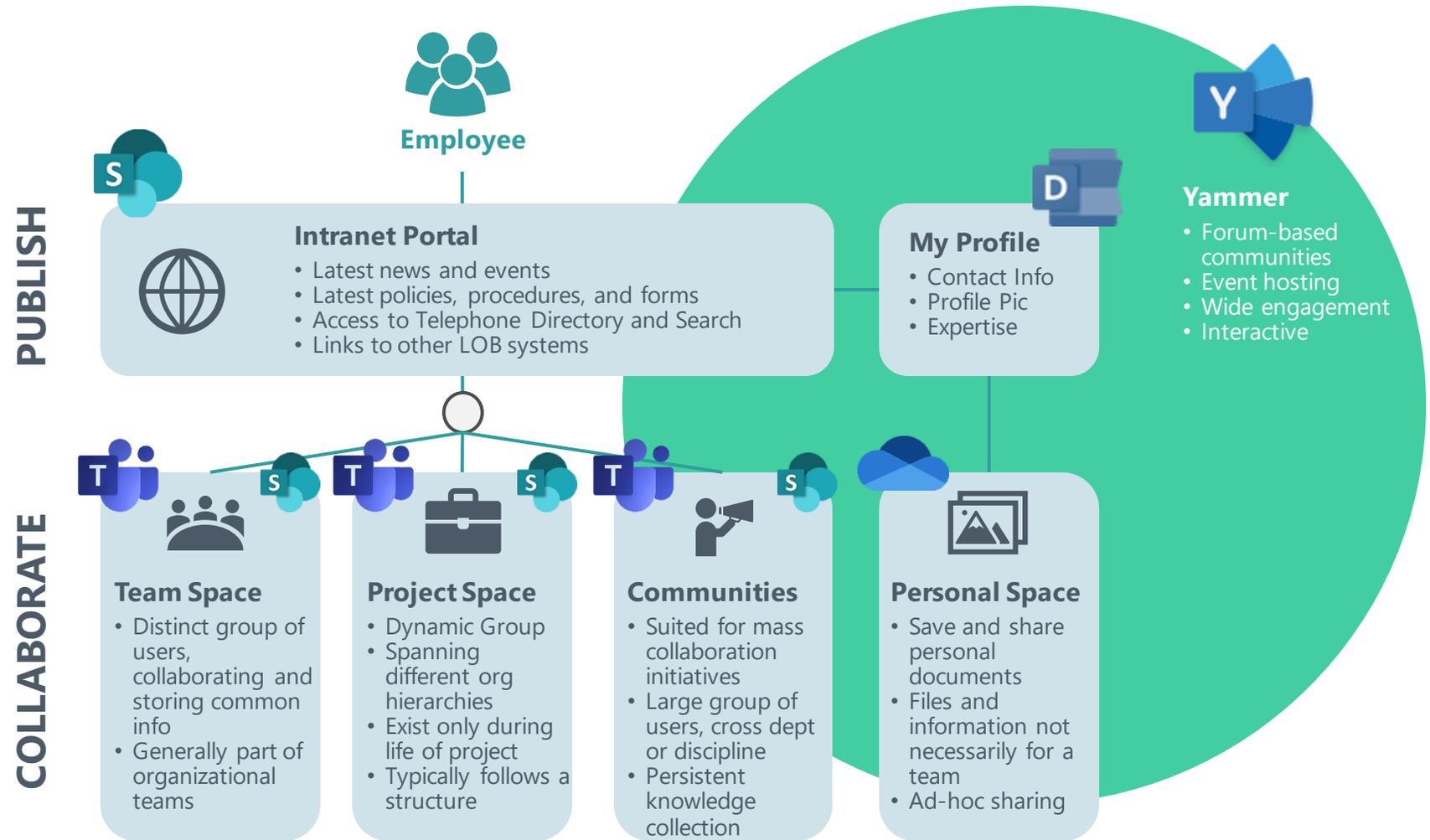
What should I use when?

OneDrive is clear for **personal** storage/sharing.

Teams is clear for **team-based collaboration**.

SharePoint depends if you're using it in a *Publishing* or *Collaborative* capacity

Yammer adds Social and Forum features across all aspects.



Common Intranet Complaints

There isn't anything there for me there.

Is this going to be ANOTHER repository?

My email works fine for communication.

I already know where my apps are.

We had an intranet before and I didn't like it because...



Common Intranet Complaints

There isn't anything there for me there.

*There SHOULD be!
Policies, Forms, HR, personalized news, and more...*

Is this going to be ANOTHER repository?

*Maybe, but maybe not.
It should be the "front door" to apps and repositories.*

My email works fine for communication.

*Perhaps just for YOU, but what about everyone else?
And 'Death by Attachments!'*

I already know where my apps are.

Maybe YOU do. But what about new joiners? Or what about that new app that was just published yesterday?

We had an intranet before and I didn't like it because...

*There are many challenges with Intranet projects.
Let's learn from the experts with a real-world example!*





Case Study: Wells Fargo

 #shifthappens

#Shifting our intranet to a seamless and integrated digital experience

What I will be sharing...

- Intro to our digital workplace strategy
- Where we started (and the pain points)
- What we did first
- The end result
- What we are working on now
- Lessons learned



Christy Punch

Digital Consultant, Wells Fargo

Charleston, South Carolina

 @christyseason

[linkedin/in/christyseason](https://www.linkedin.com/in/christyseason)

Wells Fargo at a glance

1 in 3 households in the United States
does business with Wells Fargo

Approximately 70 million+ customers

Approximately 260,000 team members
in 32 countries

- ★ Most Valuable Banking Brand - #1 in the United States, #5 in the world
(2019) *Brand Finance*
- ★ #1 Largest workplace employee giving campaign in the U.S. for 10th consecutive year
(2019) *United Way Worldwide*
- ★ 25th Top Company to Work for in U.S.
(2019) *LinkedIn*
- ★ 13th Top Company For Diversity
(2019) *DiversityInc*



Provide a **simple, flexible** and **intelligent** digital experience that helps team members thrive

- Wells Fargo Digital Workplace Vision

Our team includes:

- Governance & Delivery
- Service & Support
- User Experience
- Project Mgt.
- Digital Product Mgt.

I am here!

Our digital workplace “Teamworks” includes*:

- 51 line of business, personalized home page ‘views’
- Communications content sites
- Profiles + Personal Sites
- Enterprise-wide search
- Team/Project Collaboration Sites
- Enterprise Social
- Mobile apps

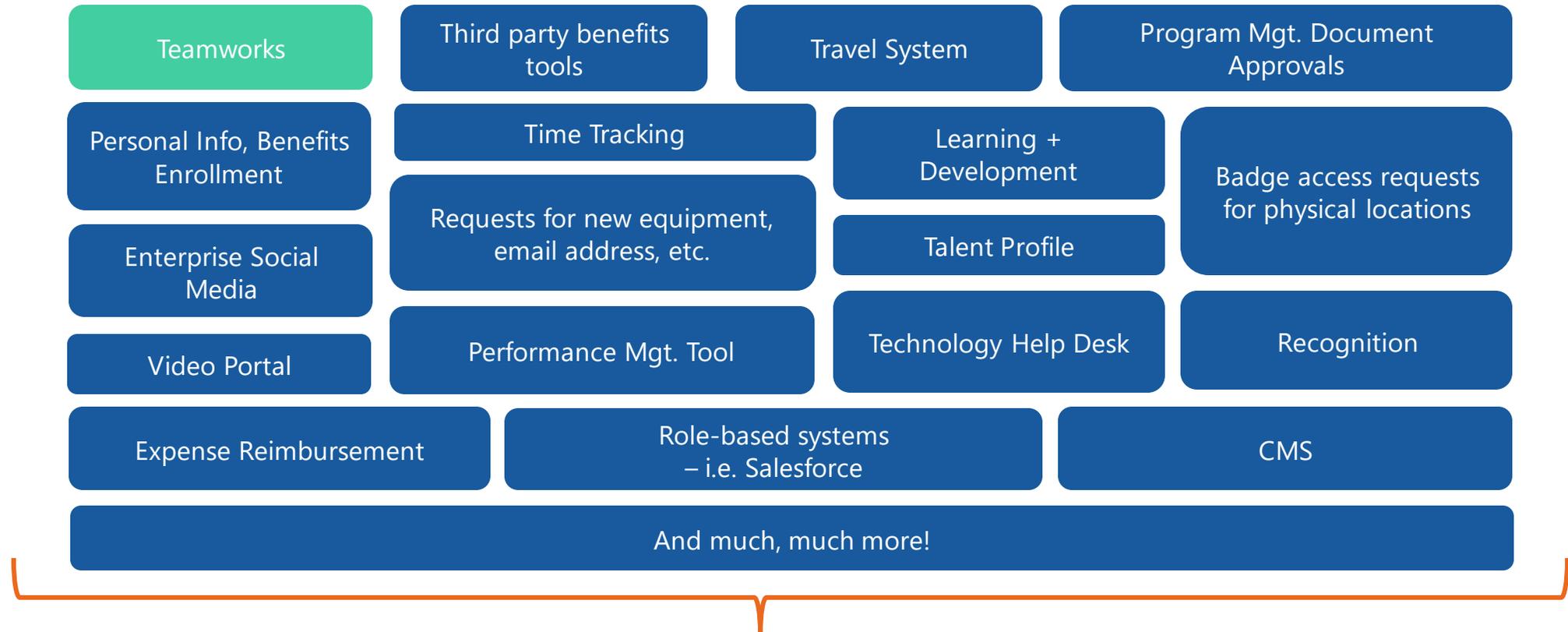
**Built on mix of custom-built microservices application, SharePoint 2013 & 2016 platforms (on-premise), custom-built micro-apps and mobile apps*

Where we started...

- Built on SharePoint 2010
- 5+ years old
- 1 million+ hits a day
- Performance a constant burden
- Not optimized for mobile
- Inflexible for line of business unique needs
- Costly and time consuming to customize
- Platform upgrades large-scale projects, disruptive and costly
- Outdated design

The screenshot shows the Wells Fargo Teamworks Marketing intranet homepage. The page features a navigation bar with tabs for Home, Marketing, Chief Administrative Office, Pay & Benefits, Career, Services & Support, Manager Center, and Company. A main banner for 'My Benefits' includes the text 'Take your time and celebrate what matters most to you' and 'Schedule your new personal holidays'. Below this, there are sections for 'Wells Fargo News', 'Chief Administrative Office News', 'Marketing News', and 'Local News'. A 'Did You Know?' section highlights a '2017 Community Support Campaign' with a 'DONATE NOW' button. An 'Assigned Training' table lists courses such as 'Preventing Workplace Harassment and Discrimination for Managers CA and New CT 2017' and 'Privileged Access Fundamentals 2017-2018'. A 'Market Place' section displays a table of stock market data for various companies, including WFC, Dow, NASD, S&P, AAPL, AMZN, FB, FTV, GOOG, GPRO, JPM, MSFT, NKE, SBUX, and TWTR. The page also includes a 'Marketing Momentum Awards' banner and a 'CAO Manager Resources' section. The footer contains the text 'Together we'll go far' and a small image of a stagecoach.

Team members use many different applications (daily)



= disjointed (and painful) team member experience

How can we deliver a successful design that...

- Meets the needs of a vast group of team members
- Satisfies our stakeholders
- Modernizes a complex and ever-evolving technical environment
- Has minimal impact to the important day-to-day work of the company

Answer: Listen to our team members

We focused on team member and stakeholder user research to better understand team member behaviors and expectations.

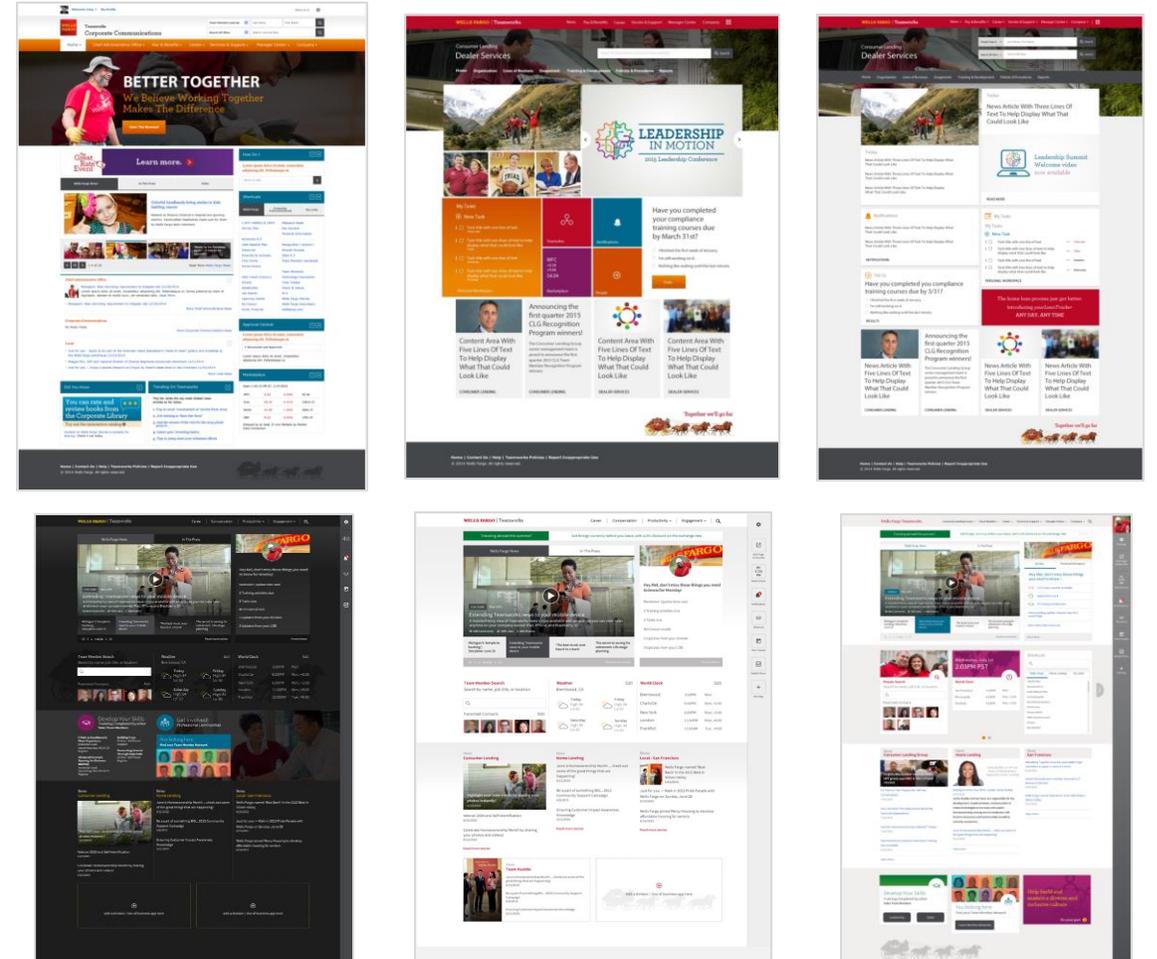
Team Member-driven, iterative design approach

Design + Prototype

Team Member user testing + reviews with stakeholders

Evaluate

Have we reached a stable, viable state?



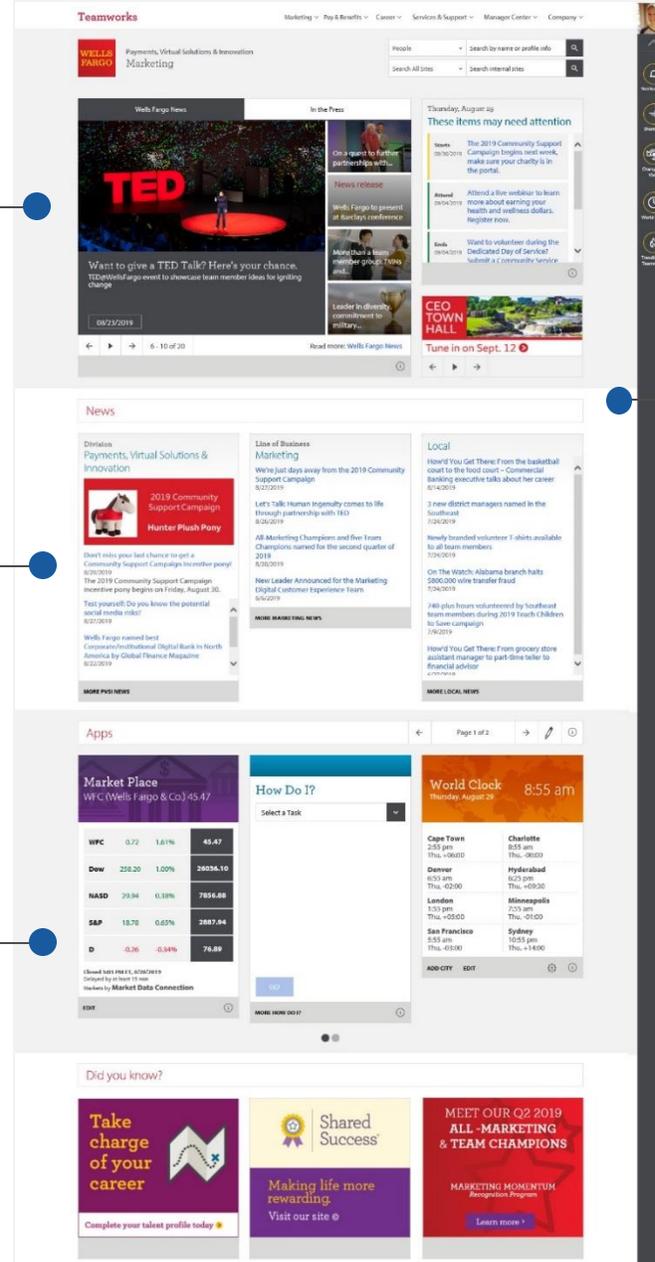
The end result....

....a new, primary digital experience...

Evolved, more modern design

Well organized "rows" of content/ capabilities that can be re-stacked based on LOB priorities

Content and tools organized in "cards", enables a mobile-adaptive design

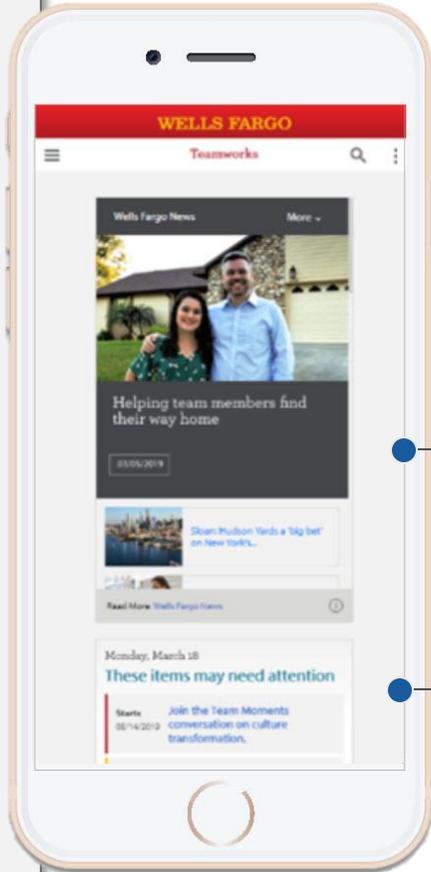
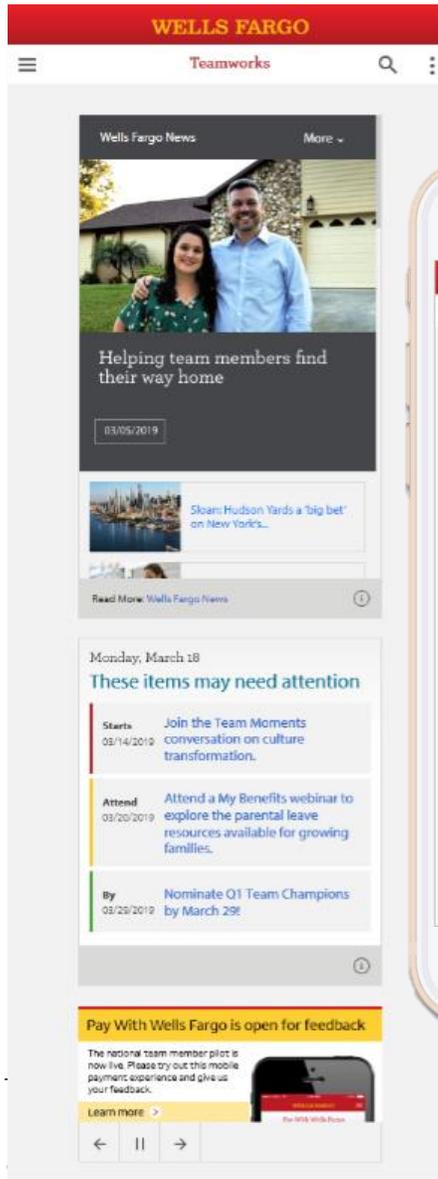


A "toolbar" that follows users throughout Teamworks, providing easy access to Shortcuts, Notifications and apps

"It doesn't look dramatically different so I won't feel lost. I like that it's a blend of what I'm accustomed to and new functionality..."

–Team Member quote from Teamworks User Research

Mobile adaptive design



"I like it! I'm most excited about mobile – I'll have to start carrying my work phone. This is more user friendly, I'd use it more."

–Team Member quote from user research

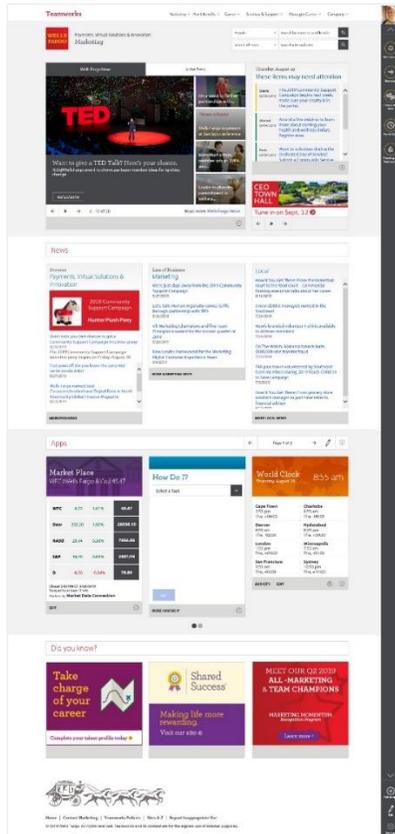
Mobile responsive based on screen width (tablet, mobile phone), mobile menus

Familiar mobile interactions like swiping and the 'hamburger' menu

Team member satisfaction with mobile experience increased by 10%

Finding the right technology to meet our team member needs

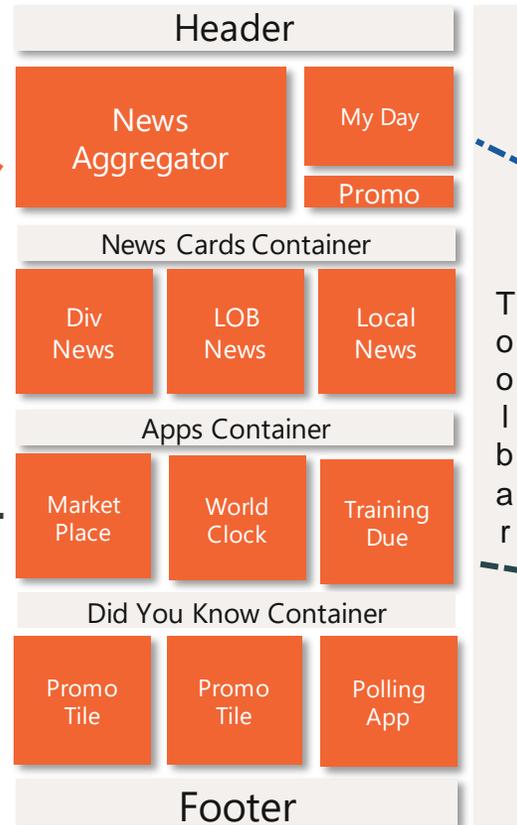
Micro-services is a technology architecture where each feature is its own 'service' or independent application



What the team member sees
One experience

 SharePoint platform (configurations, publishing)

 Market Data



What's under the covers
Lightly coupled microservices

 Notifications: Integrated with multiple enterprise systems

 Learning & Development system

- Benefits of microservices:**
- ✓ Better performance and reliability (average page load time has improved from half a second to less than one-fifth of a second)
 - ✓ Supports DevOps and continuous delivery
 - ✓ Flexibility to bring data in from other applications and systems
 - ✓ Cloud ready
 - ✓ Ability to address issues with a feature without impacts to rest of home page
 - ✓ Lower risk for future platform upgrades
 - ✓ Greater portability of features into other environments
 - ✓ One seamless user experience

Personalized home page views

Content changes based on 'who' you are and your 'view' of the home page

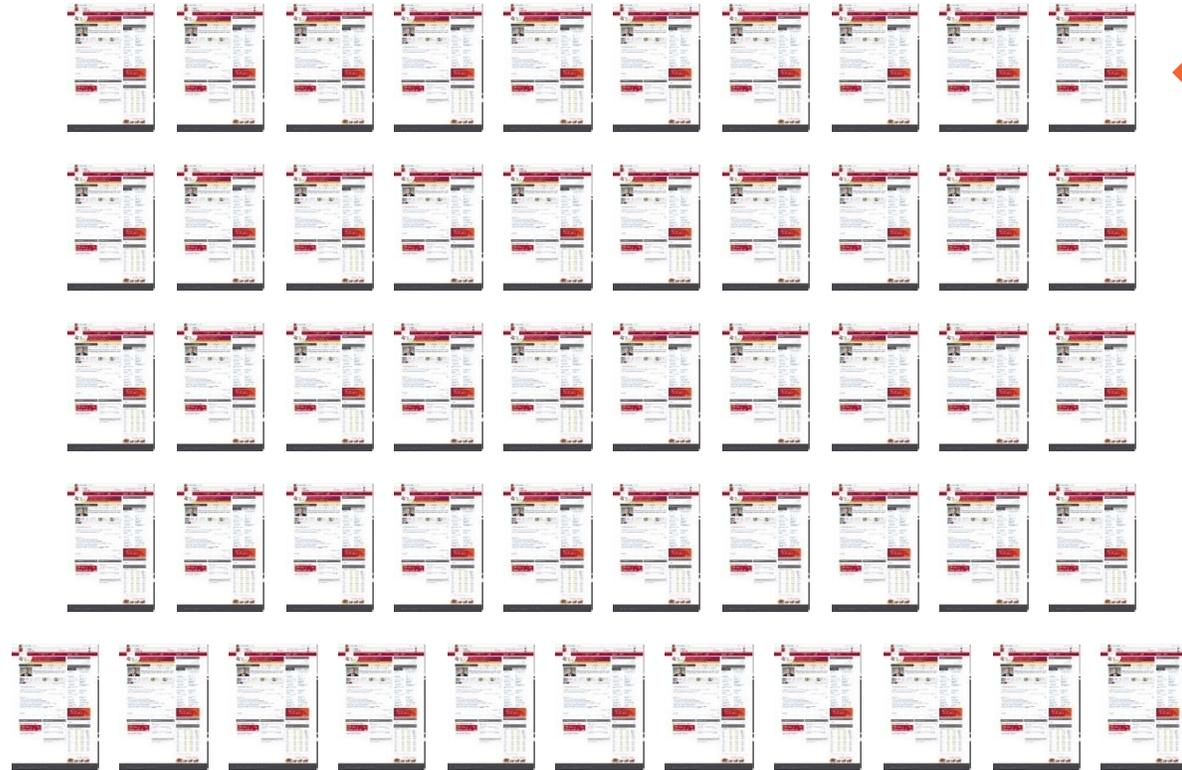
The screenshot displays the Teamworks interface for a user in the Marketing department. The top navigation bar includes 'Teamworks' and various menu items like 'Marketing', 'Pay & Benefits', 'Career', 'Services & Support', and 'Manage'. The user's profile is visible in the top right corner. The main content area is divided into several sections: 'Wells Fargo News' with a featured article about horse-drawn stagecoaches, 'In the Press' with a 'Team News Special' and a quote, and a calendar for 'Friday, August 30' with several events. A 'Change My View' overlay is open on the right, showing options to change the view to 'Corporate Communications' or 'Marketing', and to set the default home page. A notification at the bottom of the overlay states: 'Your default home page has been changed to the Marketing home page.' The sidebar on the right contains various icons for notifications, shortcuts, world clock, trending on Teamworks, and settings.

Team members can change their view, and customize which view is their 'default'

'One home page', many views

We have 51 line of business 'home pages'.

What that looked like with the old home page:



HR is adding '*Manager News*' to the news carousel

Update, save, test, publish, test...
on each of the 51 websites for
each line of business home page



~15 minutes x 51 home pages = 12.75 hours

'One home page', many views

With shift to microservices, we now have 51 line of business 'views' of one home page site.

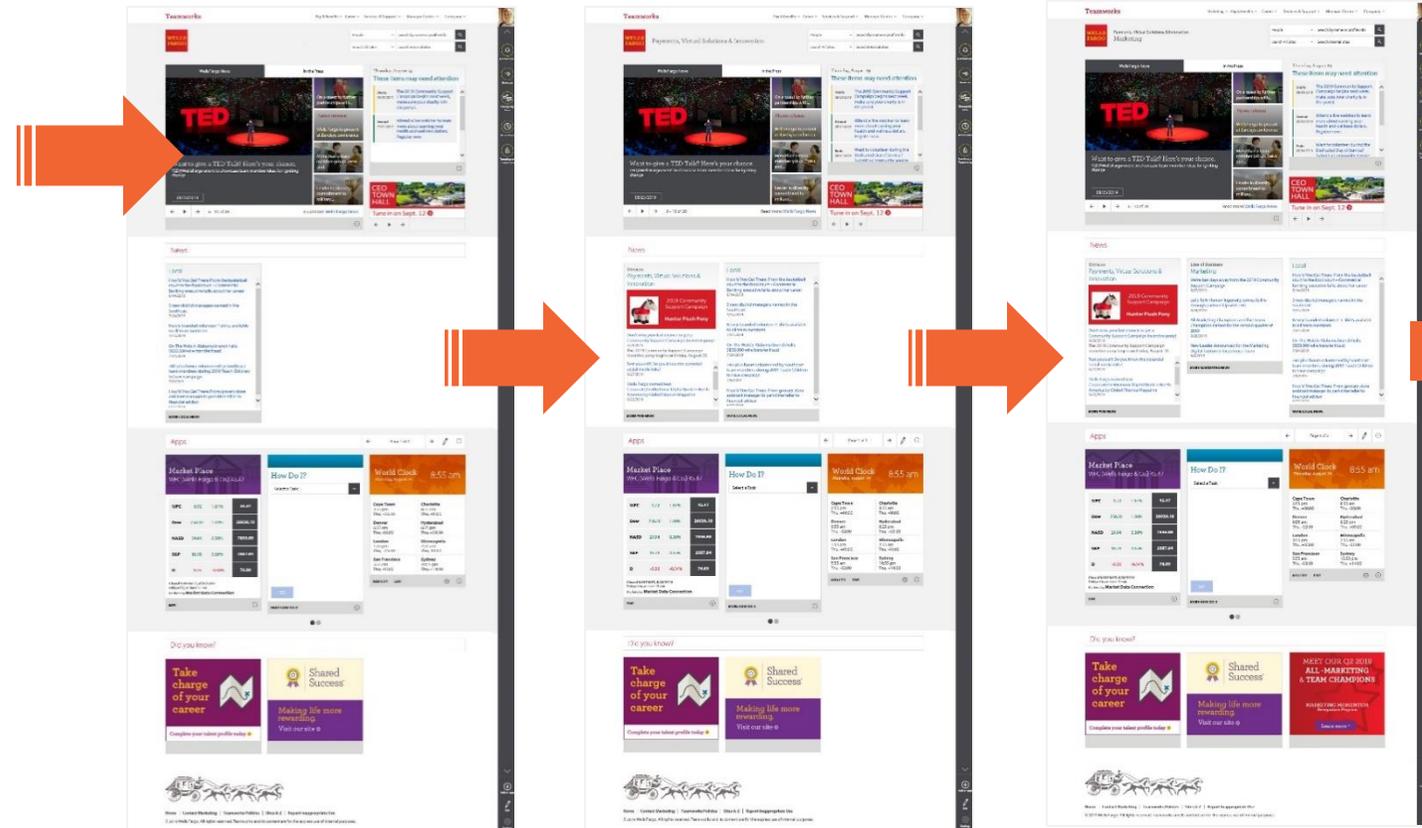


HR is adding 'Manager News' to the news carousel

Each 'view' is defined using a list item in a SharePoint list.

Includes properties such as:

- Titles + labels
- Permissions
- What apps show and where
- View's relationship to other views ('inheritance')



Enterprise view

Division view

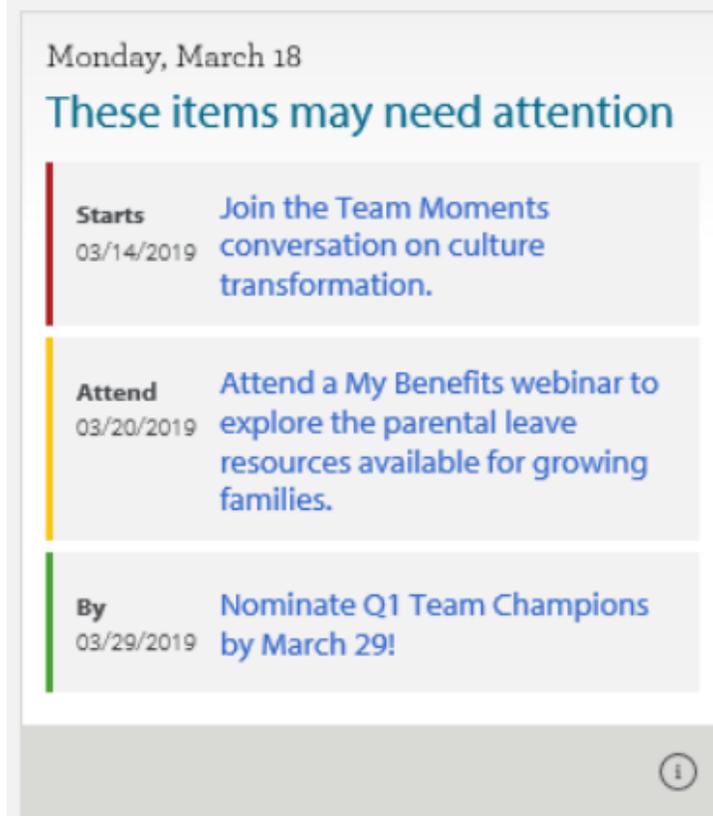
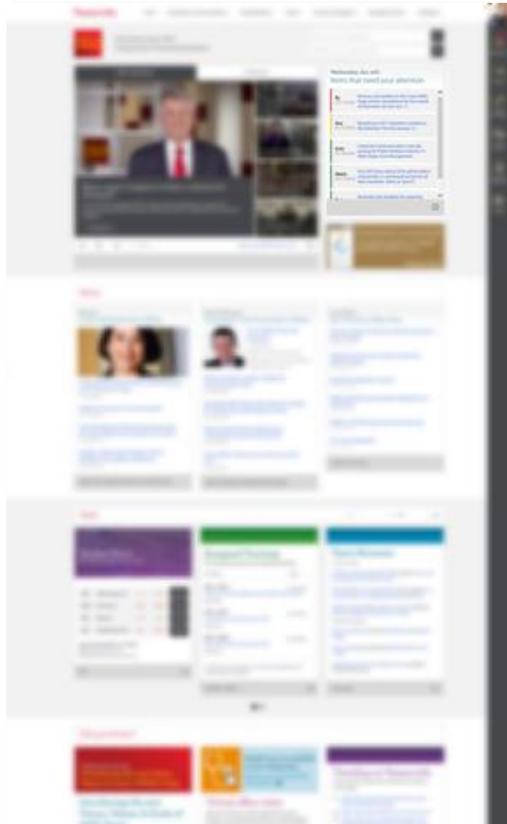
Line of Business view

~15 min. x 1
home page =
15 min.

When views 'inherit' from another view, it makes it easier for our team to deliver to and support the home page.

My Day

'My Day' provides team members with brief, personalized, and timely updates.



Updates are limited to 120 char, cannot be posted more than two weeks in advance

Content published from multiple sources, targeted by home page view and audience

Updates order and color-code based on the current date

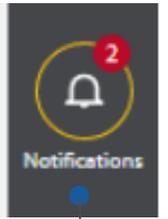
"It works! When I posted a critical communication in My Day instead of using a banner promotion, I had six times the amount of clicks."

—Happy Line of Business Communicator

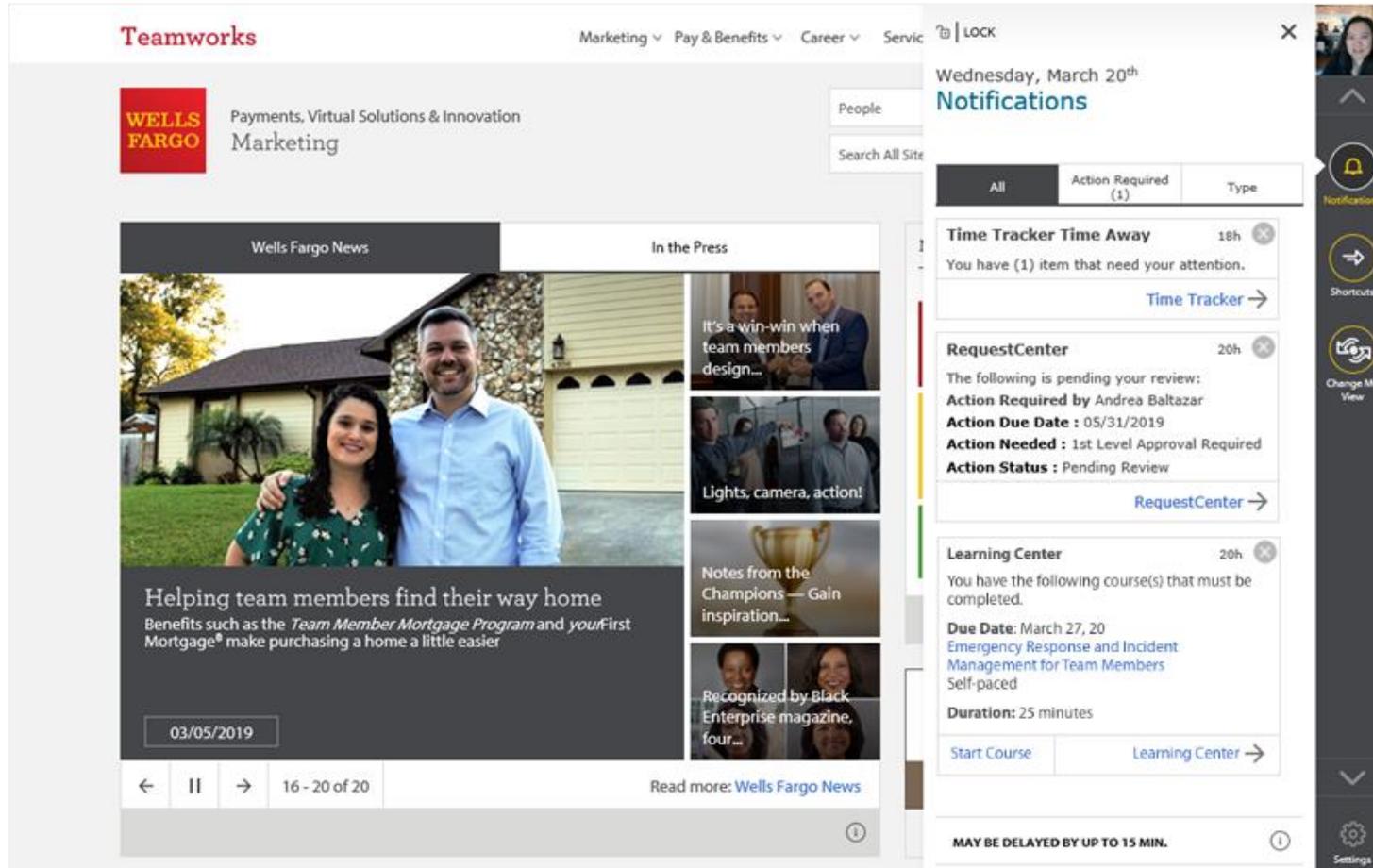


Notifications

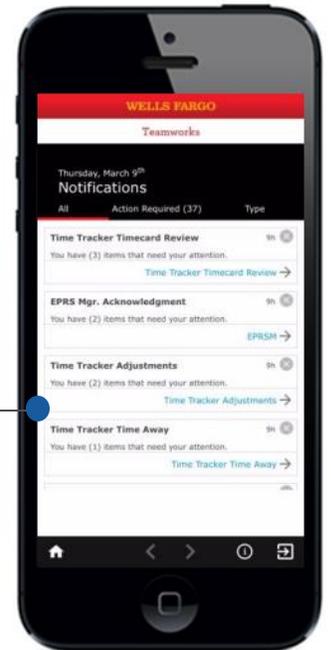
Notifications surfaces notices or items needing action from multiple enterprise systems into an aggregated view.



Number badge displays when team member has new notifications

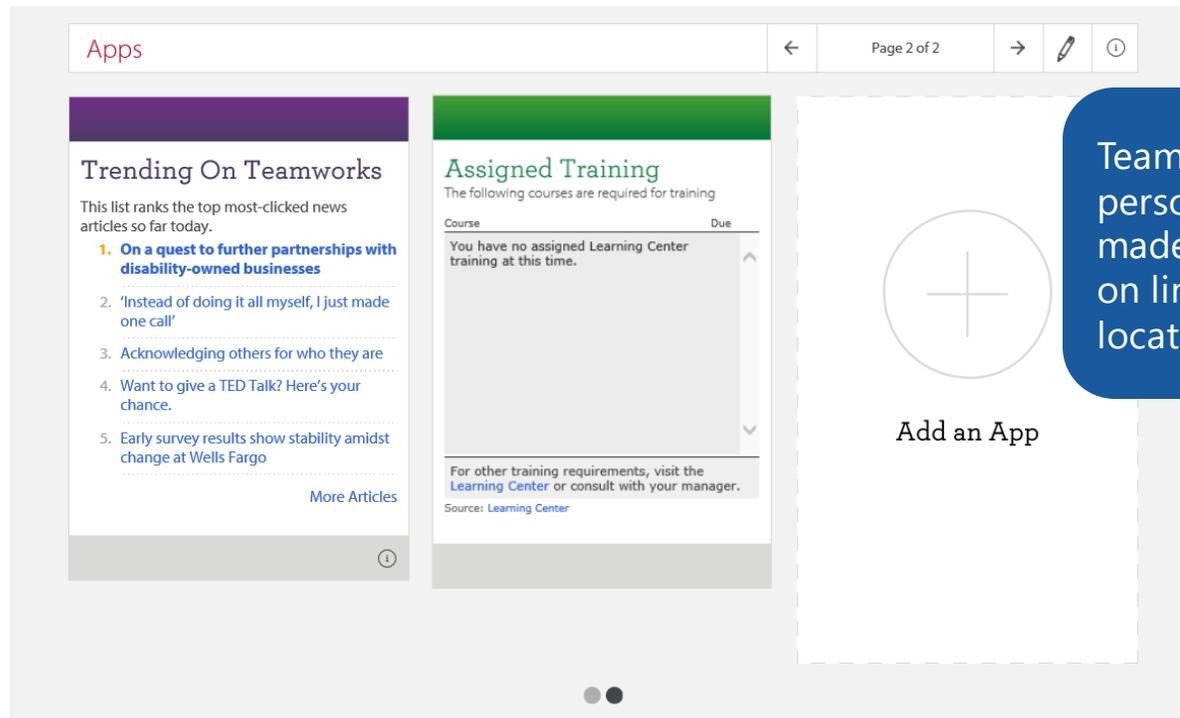


Mobile app provides a mobile user experience for enterprise systems lacking mobile options



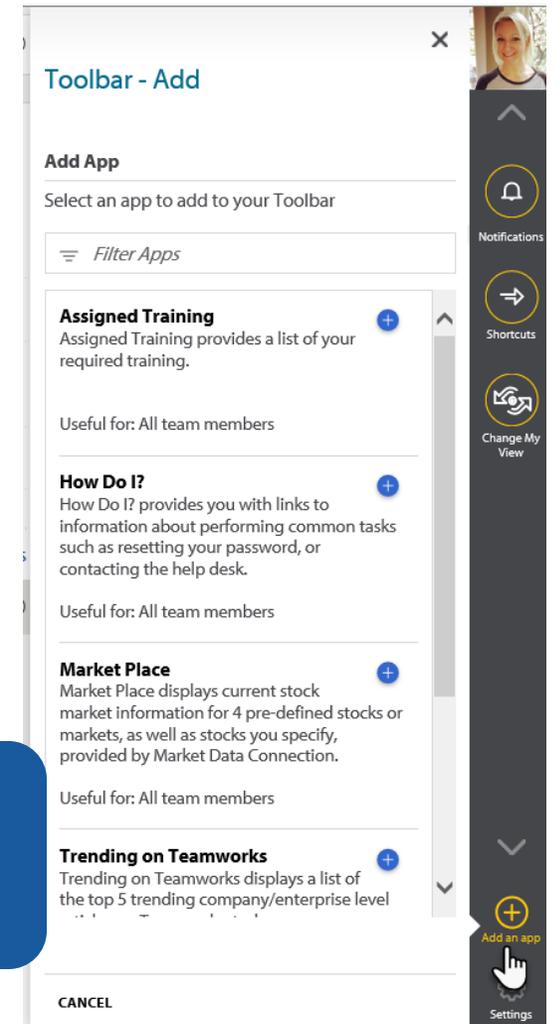
Team members want to customize the home page

Team members have option to add, move, and remove apps on their home page Toolbar and Apps row.



Team members select from a personalized library of apps, made available to them based on line of business, role, location, etc.

We are extending the Toolbar to make it available everywhere in Teamworks



Our Dilemma:

How can we deliver a successful Our Dilemma:

How do we build a robust library of governed, integrated 'apps' to meet all of the varying needs of our lines of business and their team members?

With a limited budget?

With one team!?!

Decentralized app development

Microservices technology provides flexibility to surface data or applications from other internal sources

How does this work?

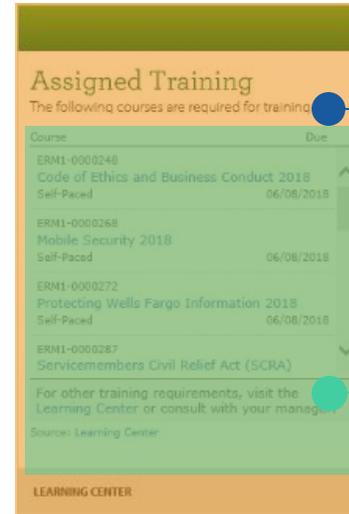
- Teamworks home page 'sources' app through our framework
- Other application and technology teams build, manage, and own the app
- Apps are added to the app library and made available for team members to add to the home page

What's an added bonus to this approach?

- Apps built for the home page are by design mobile optimized

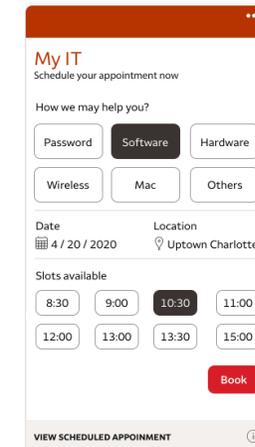
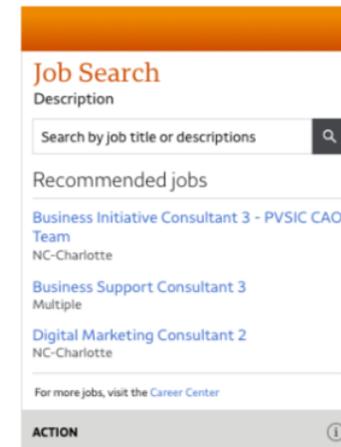
What is the desired end-result?

- A growing library of 'micro' apps for team members to choose from



Teamworks framework

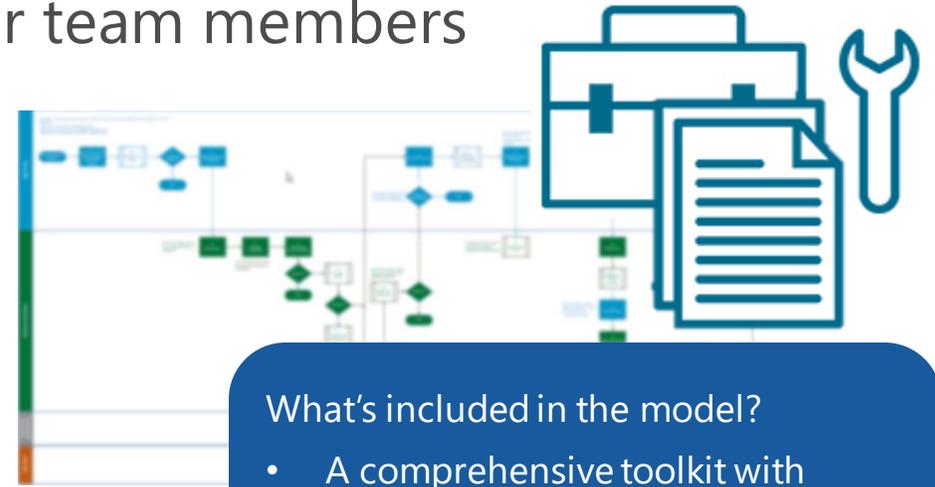
Application built outside of Teamworks



Managing risk with a governed app model

We developed a **workflow process** and documented '**toolkit**' to empower other teams to build and design apps for team members to place on their home page

- It's a win for our partners, for our team, and for our team members
 - ✓ Greater flexibility for other teams to build solutions for unique needs
 - ✓ Enables our team to focus on enterprise-wide solutions
 - ✓ Creates opportunities for partnerships across the company to solve for the team member experience

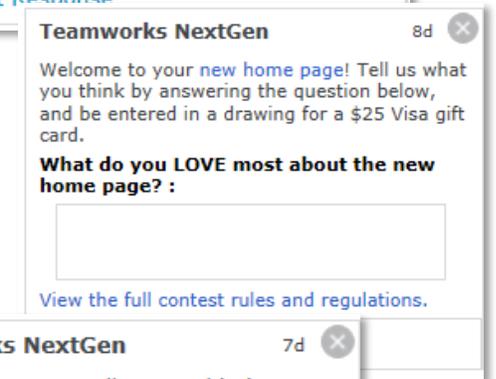
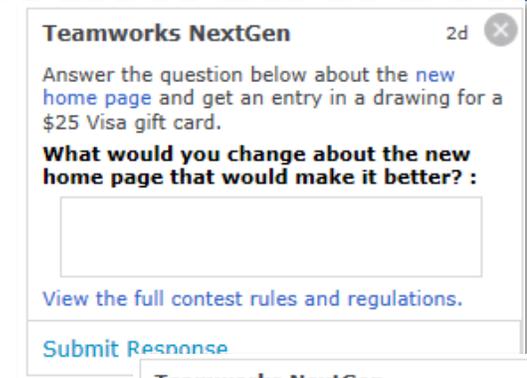
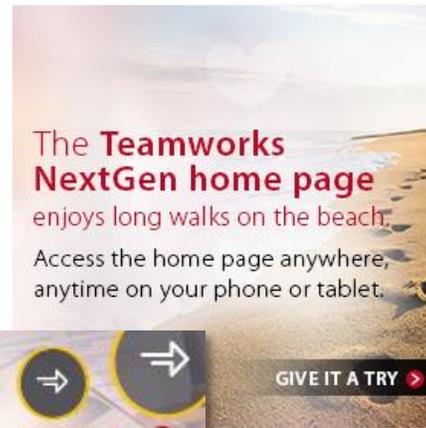


What's included in the model?

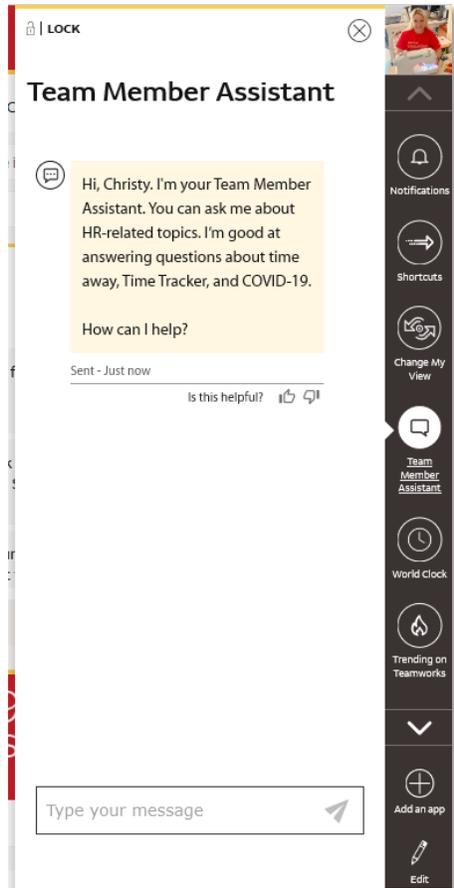
- A comprehensive toolkit with guidelines, FAQs, and examples
- Access to technical support and consulting
- Reviews and sign offs
- Aligns with existing Teamworks Governance and Wells Fargo's internal policies, standards & processes

New home page roll out and communications plan

- Rolled out in phases by line of business
- Launched on **Valentine's Day** and asked team members to "Love your home page again"
- Used Notifications to run a "question-a-day" contest with gift card giveaway (collected 6,700+ feedback responses in one week)



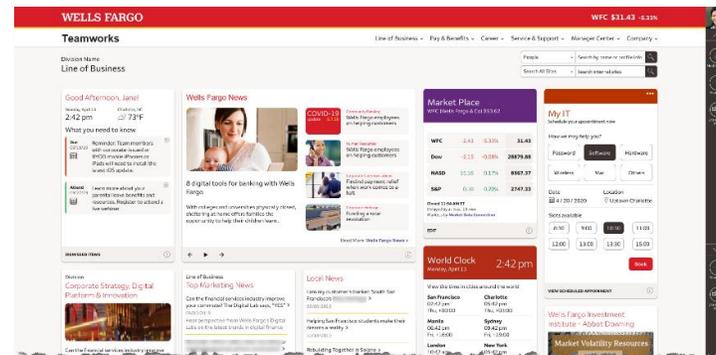
What we are working on now...



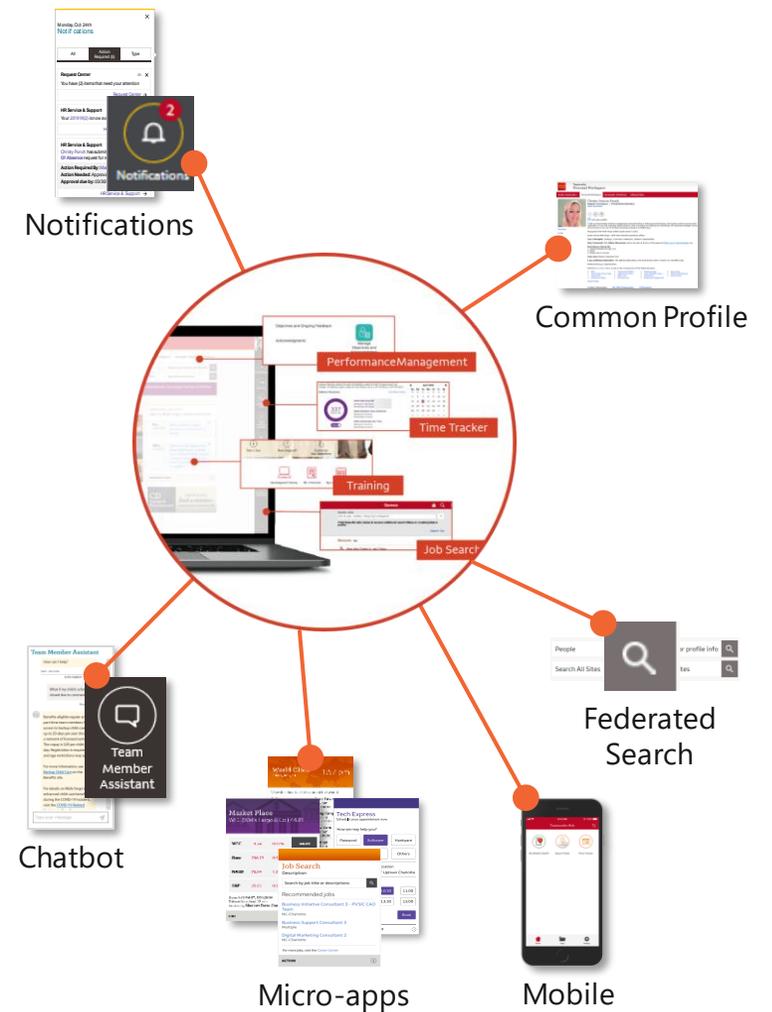
Piloting internal chatbot
Focused on HR topics



Customizable mobile 'hub'
Single sign-on, quick access to mobile applications and sites



Less-structured design, more flexibility
Moving from pre-defined rows to full responsive, vertical-grid design



#Shifting from 'portal' to digital experience layer
Connecting across large systems, simplifying and surfacing what's important in one, personalized experience, navigating team members to exactly where they need to go

In summary, what we have learned...

- Iterative design approach helped us find a balance between team member needs and stakeholder needs
- It's no longer one platform to rule them all, but one experience powered by multiple solutions
- Pilot and iterate, always – to test and learn, and, when it's needed, to quickly #shift your strategy
- Nothing happens quickly, at any size organization. Don't give up and stay the course. You are not alone!



Christy Punch

Digital Consultant, Wells Fargo

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Latest intranet innovations in Office 365

Leveraging O365 for Intranets



Hub Features

Shared Colors,
Navigation, Footers



Yammer Integration

Bringing the best of
enterprise social into
your Intranet



Modern Experiences

Natively mobile ready

Other recent SharePoint Features

- New layouts and features being added to Home Sites / Communication Sites
- Mega menus
- Microsoft Search
- Updates to Yammer and Stream
- New templates and examples in the Lookbook <https://lookbook.microsoft.com/>
- Extensibility

The screenshot displays a SharePoint Home Site for 'Contoso Electronics'. The top navigation bar includes the site name, a search bar, and navigation links like 'The Landing', 'Who we are', 'What's happening', 'Find it', and 'My SharePoint'. A large hero image at the top features a drone over a lake, with the text 'Contoso Mark 8: See the world through a whole new perspective'. Below the hero image are several news items, including 'LEADERSHIP CONNECTION: Contoso Eagle launch and the future', 'Benefits: New 401K Packets Available Now!', and 'NEWS @ CONTOSO: President Keynote Speech May 2019'. A 'Recommended viewing' section shows video thumbnails for 'April Town Hall Highlights', 'Customer Showcase: Amanda Brady, Connecticut wilderness', 'In the Design Studio with Carlos Slattery', and 'Mark 8 Road Map'. On the right side, a sidebar contains a 'CONTOSO Falcon Product Launch' announcement with a countdown timer (12 days, 01 hr, 07 min, 54 sec) and a 'READ PRESS RELEASE' button. Below this is a weather widget for Redmond, United States, showing 59°F and 'Partly Sunny'. Further down are weather widgets for Redmond, WA (8:52 AM) and Singapore, Singapore (11:52 PM). At the bottom of the sidebar is a 'My recent documents' section with a 'See all' link and a list of documents, including 'Getting Around'. The bottom of the page shows an 'EMPLOYEE SPOTLIGHTS' section with a '+ Add' button and a calendar view for the month of May.

Wrapping Up

- Intranets *are* still relevant in the organization.
- Stay focused on the goal of your intranet.
- Consider content, audience, and *information sources*. Aim on bringing it together.
- Consider your approaches... there is value in Out of the Box, value in custom Apps, and value in-between.

thank you

Gracias

ευχαριστώ

Danke

Grazie

благодаря

Hvala

Obrigado

Kiitos

شكراً

Tak

Ahsante

Teşekkürler

متشكراً

Salamat Po

감사합니다

Cám ơn

شكريه

Terima Kasih

Dank u Wel

Děkuji

நன்றி

Köszönöm

ありがとう
ございます

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Dziękuję

谢谢

Tack

Mulțumesc

спасибо

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