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# Business Continuity & Productivity

**IN THE DIGITAL WORKPLACE**

🕒 June 22-26, 2020    📍 #ShiftHappens Week Online

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🕒 June 22-26, 2020 📍 #ShiftHappens Week Online



## Accelerating Internal Communications

Modern Intranet Best Practices For  
the Modern Workplace

### Session

**Recording:** [https://www.youtube.com/watch?v=FPx5jXnGD9M  
&feature=youtu.be](https://www.youtube.com/watch?v=FPx5jXnGD9M&feature=youtu.be)

Presented by Christy Punch, Wells Fargo

Co-Presented by Timothy Boettcher, AvePoint

[www.shifthappenscon.com](http://www.shifthappenscon.com)



# Agenda

Why intranets are still relevant today

Case Study: The Wells Fargo story

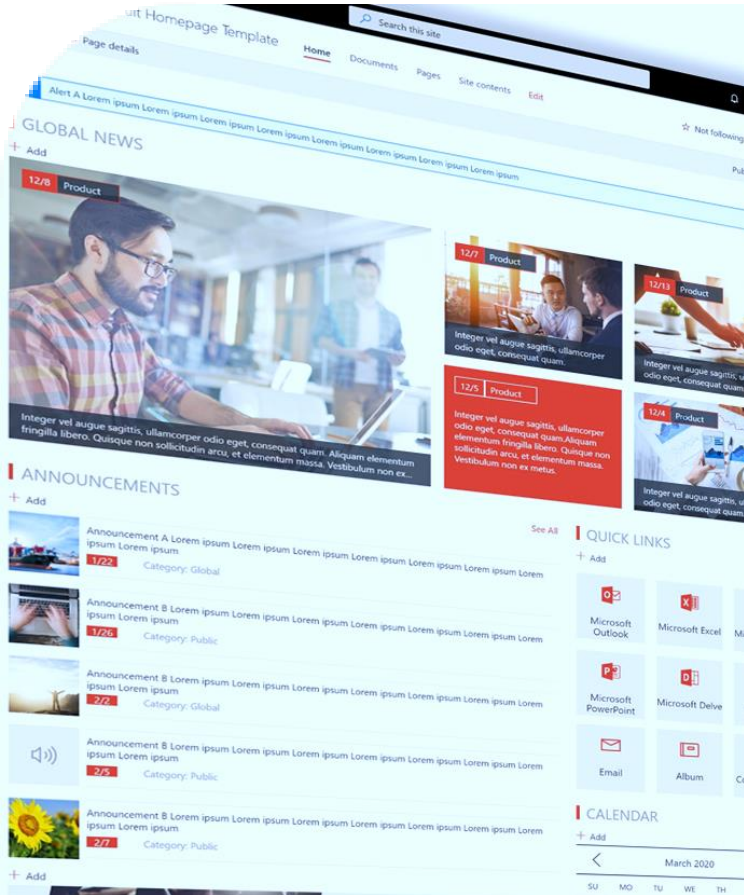
Latest Intranet Innovations in Office 365

**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.

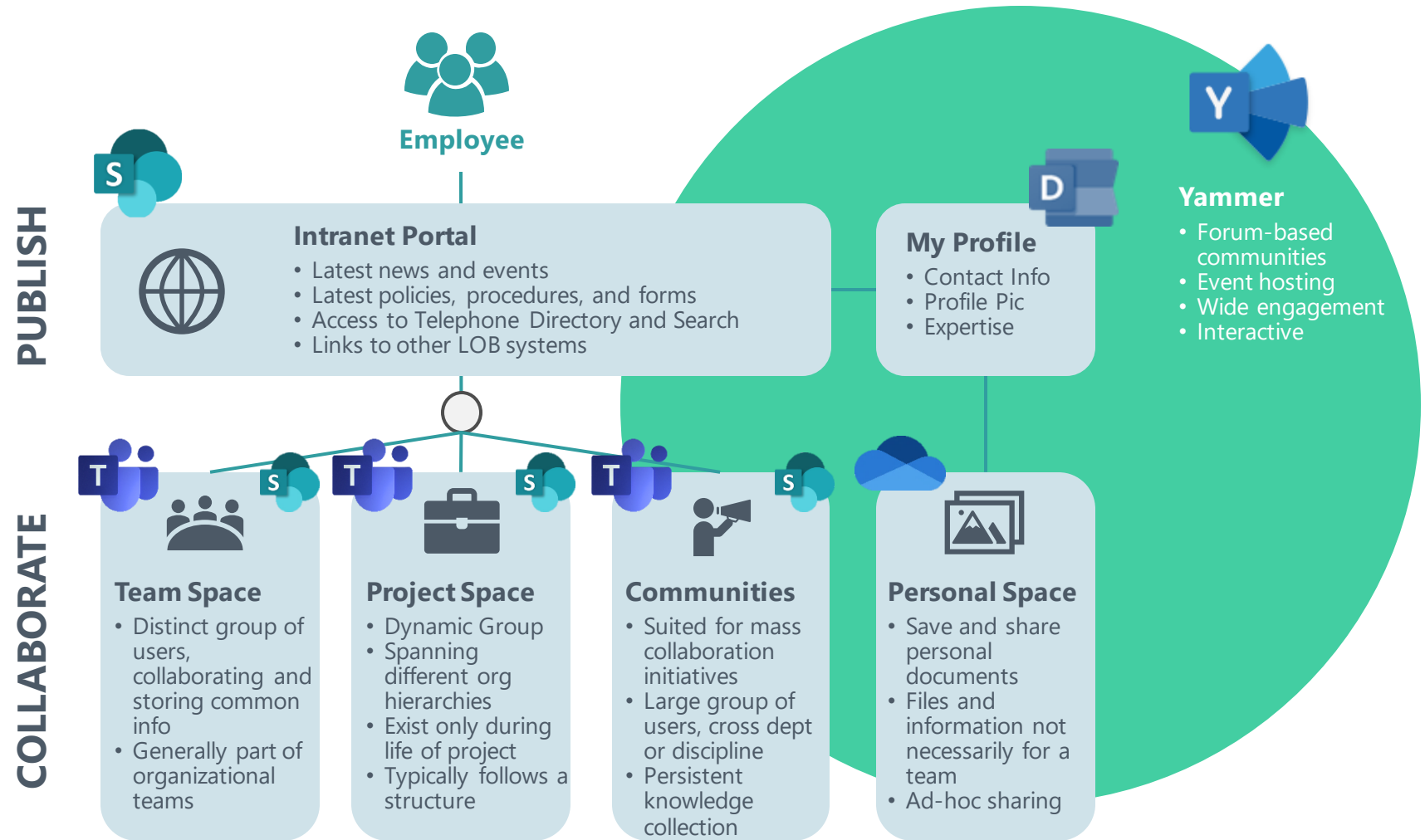
# What should I use when?

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

# #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

---

# 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*
- ★ 25<sup>th</sup> 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!

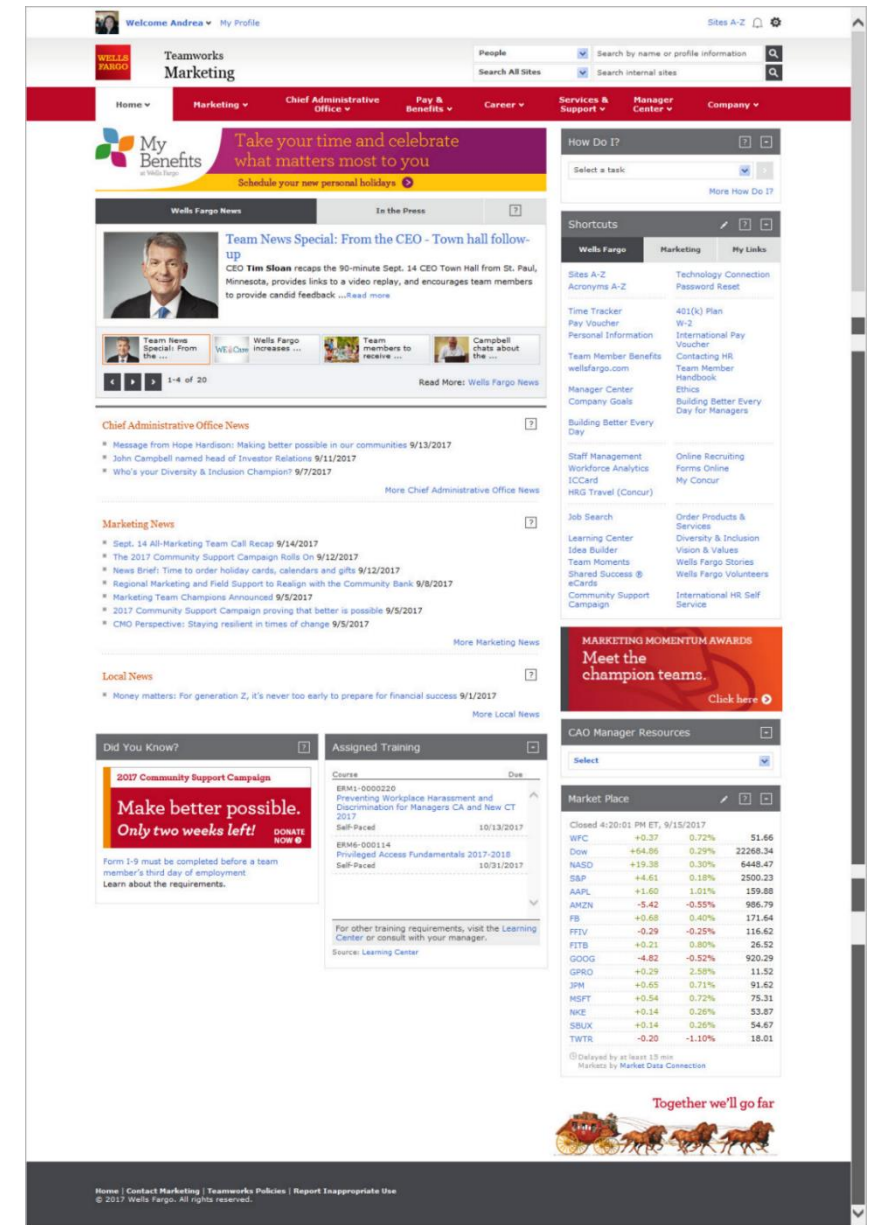
## Our digital workplace “Teamworks” includes\*:

- 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*

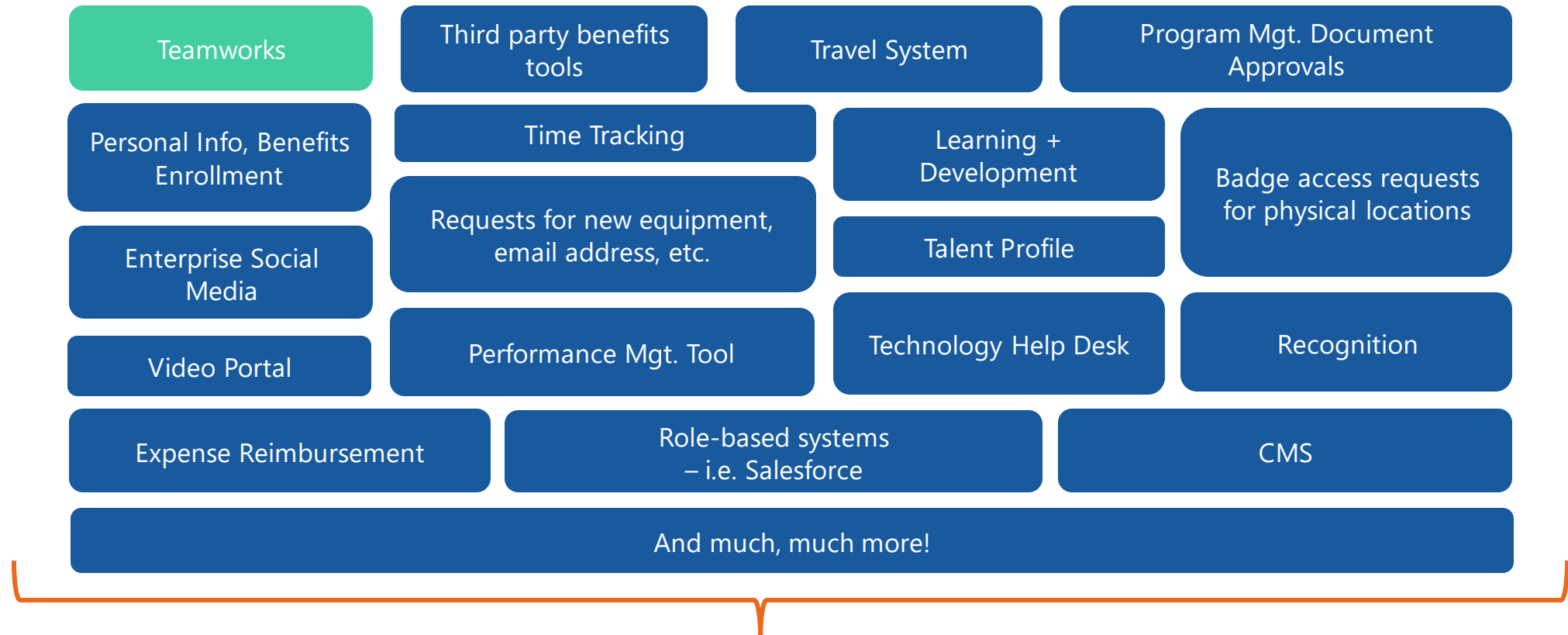
# Where we started...

- 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





# Team members use many different applications (daily)



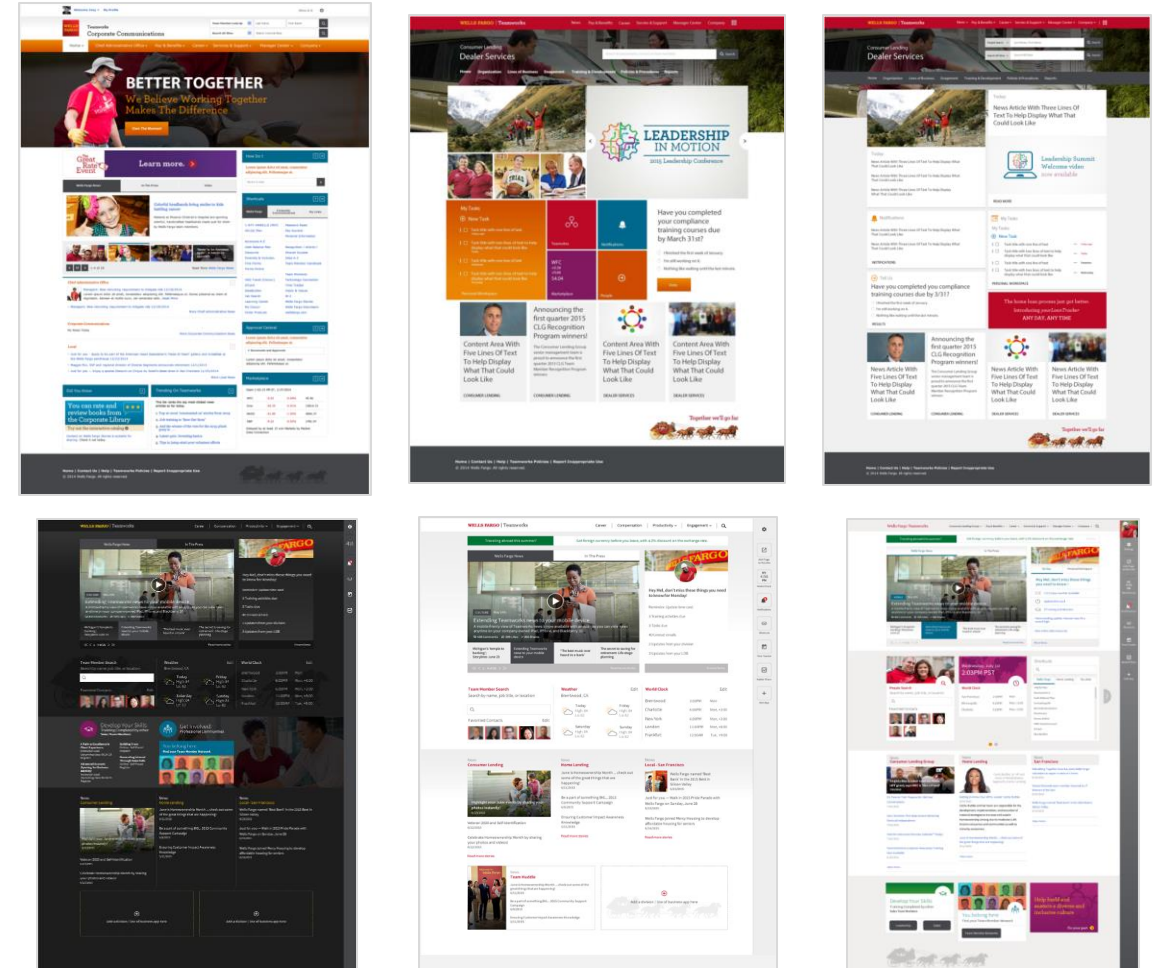
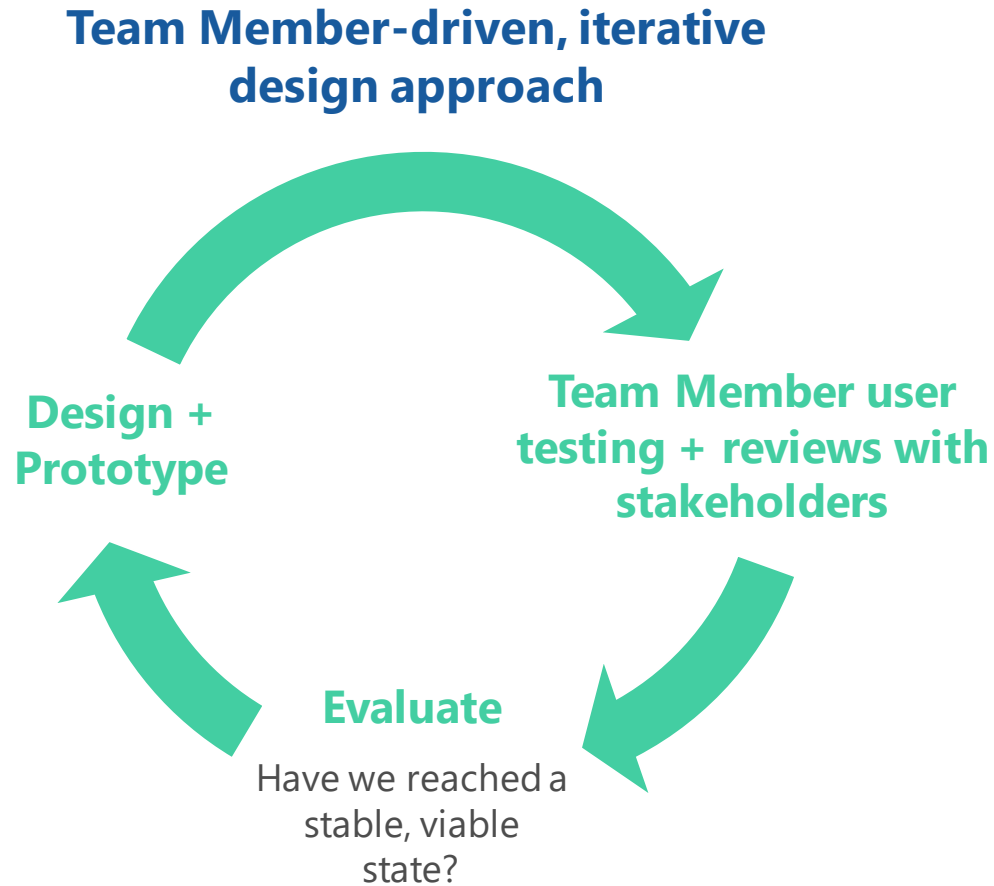
= disjointed (and painful) team member experience

# 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.



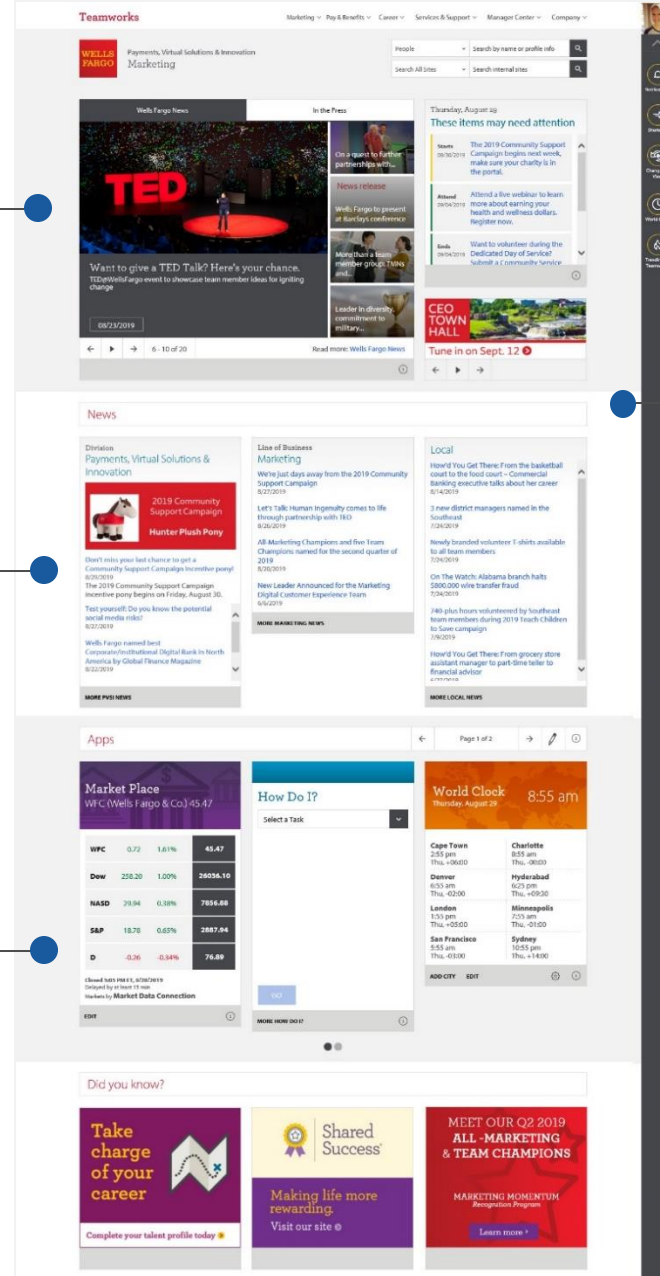
# The end result....

....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



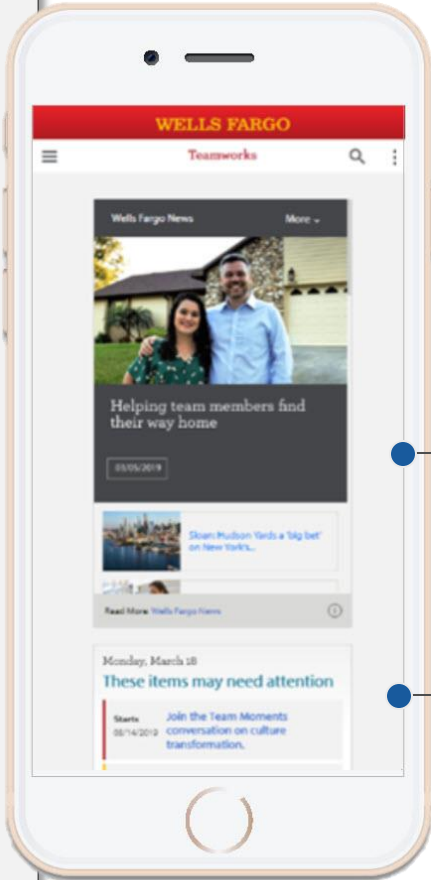
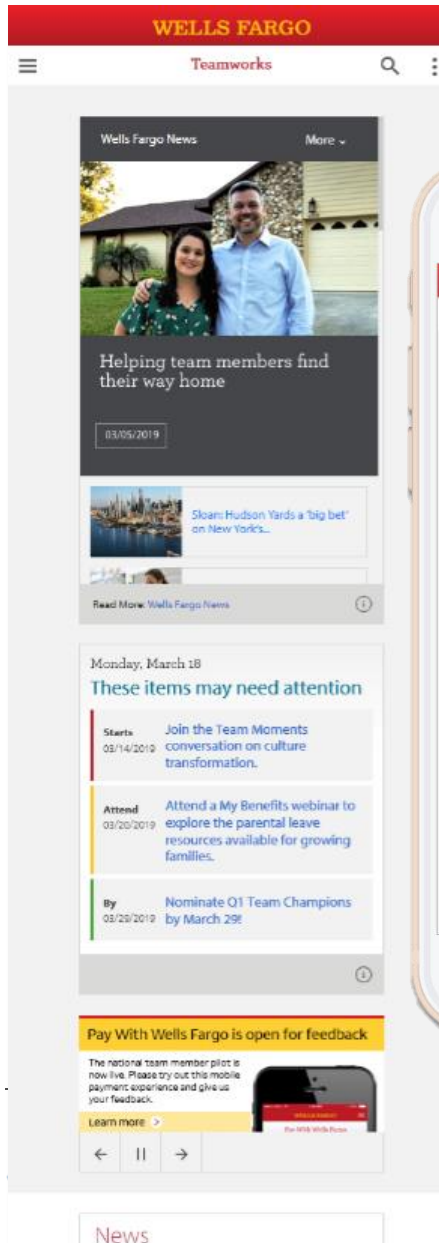
A "toolbar" that follows users throughout Teamworks, providing easy access to Shortcuts, Notifications and apps

"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*

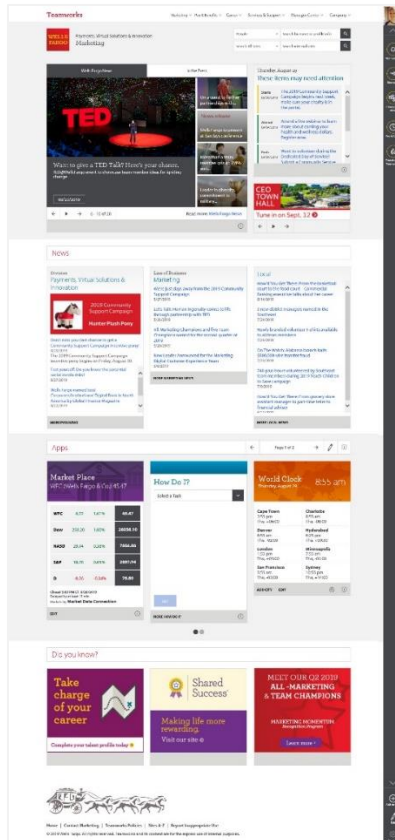
Mobile responsive based on screen width (tablet, mobile phone), mobile menus

Familiar mobile interactions like swiping and the 'hamburger' menu

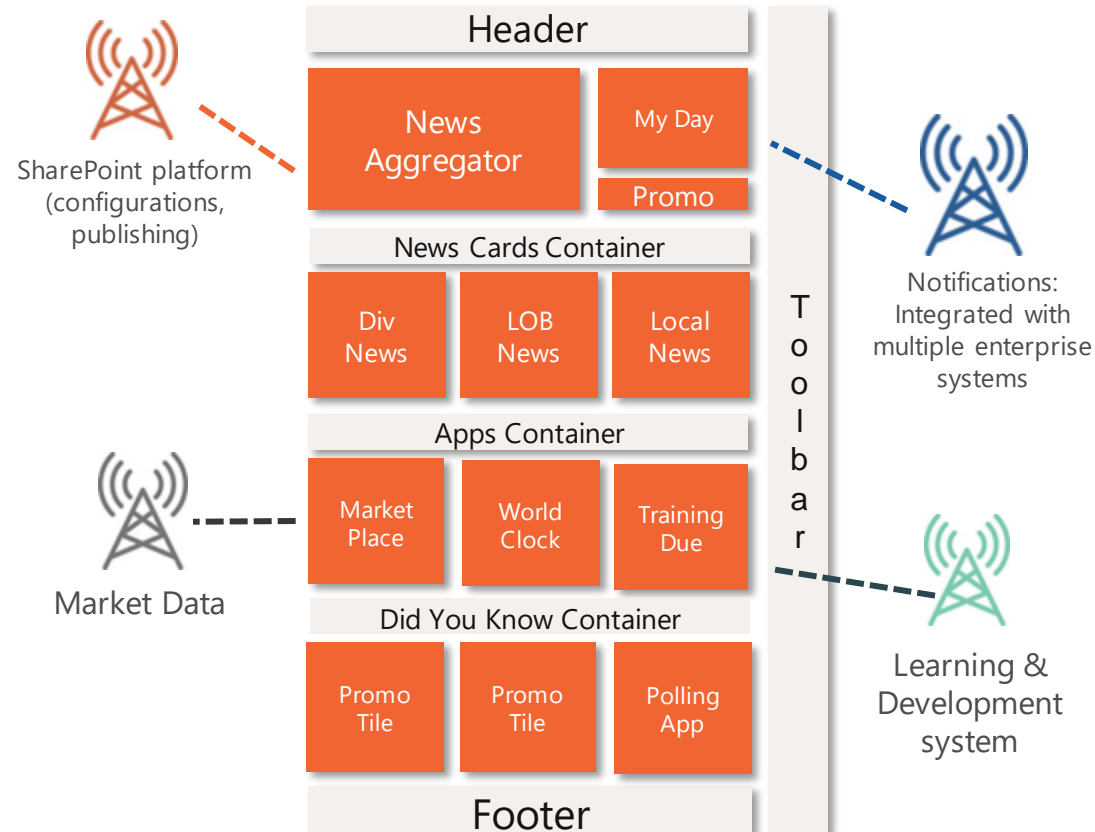
Team member satisfaction with mobile experience increased by 10%

# 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**



What's under the covers  
**Lightly coupled microservices**

## 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

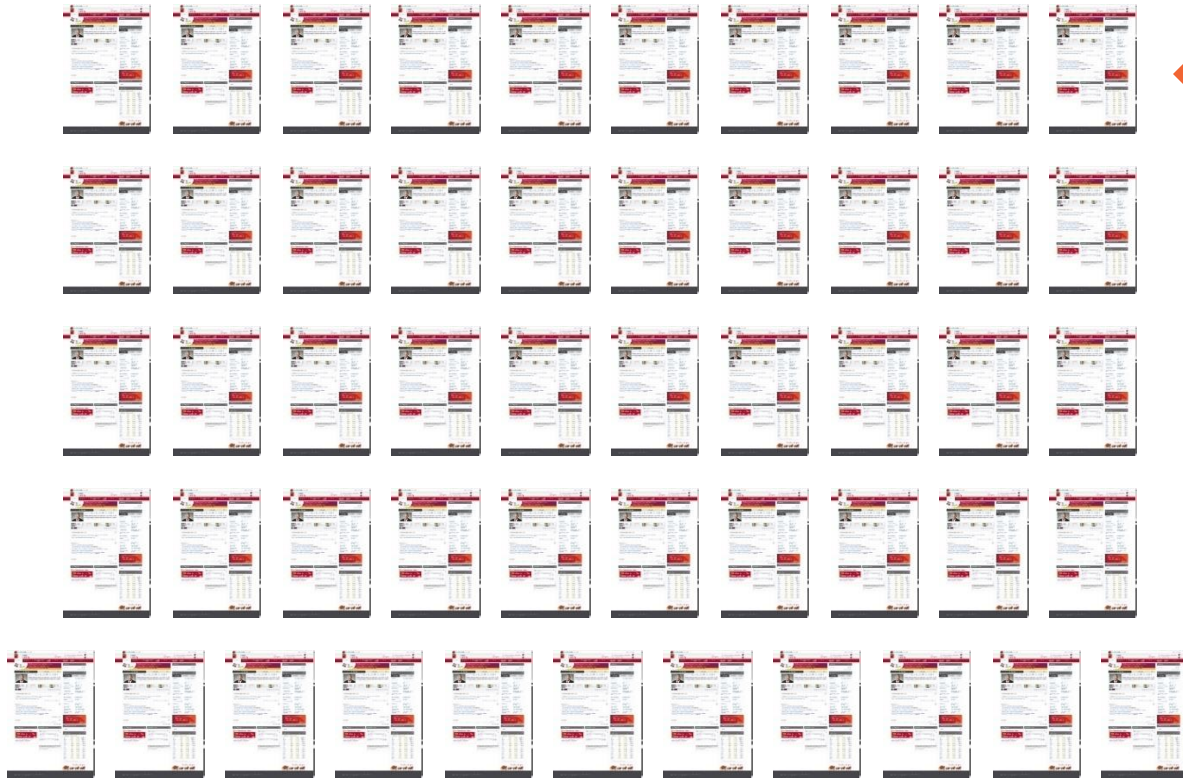
The screenshot displays the Teamworks interface for a user in the Marketing division. The main content area features a 'Wells Fargo News' section with a large image of a horse-drawn stagecoach and a headline 'Horse-drawn stagecoaches returning to our communities'. Below this, there's a date '08/29/2019' and navigation controls. To the right, an 'In the Press' section shows a 'Team News Special' and a quote. Further right, a calendar for Friday, August 30, lists several events. A 'Change My View' sidebar is open on the right, showing the user's assigned view as 'Corporate Communications' and their default home page as 'Marketing'. The sidebar also includes a 'View a different Teamworks Home Page:' section with a dropdown menu for 'Payments, Virtual Solutions & Innovation' and a 'Choose a home page:' dropdown menu for 'Marketing'. A notification at the bottom of the sidebar states 'Your default home page has been changed to the Marketing home page.' The sidebar also includes a 'CHANGE VIEW' button, a 'SET AS DEFAULT VIEW' button, and a 'Settings' icon at the bottom.

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.

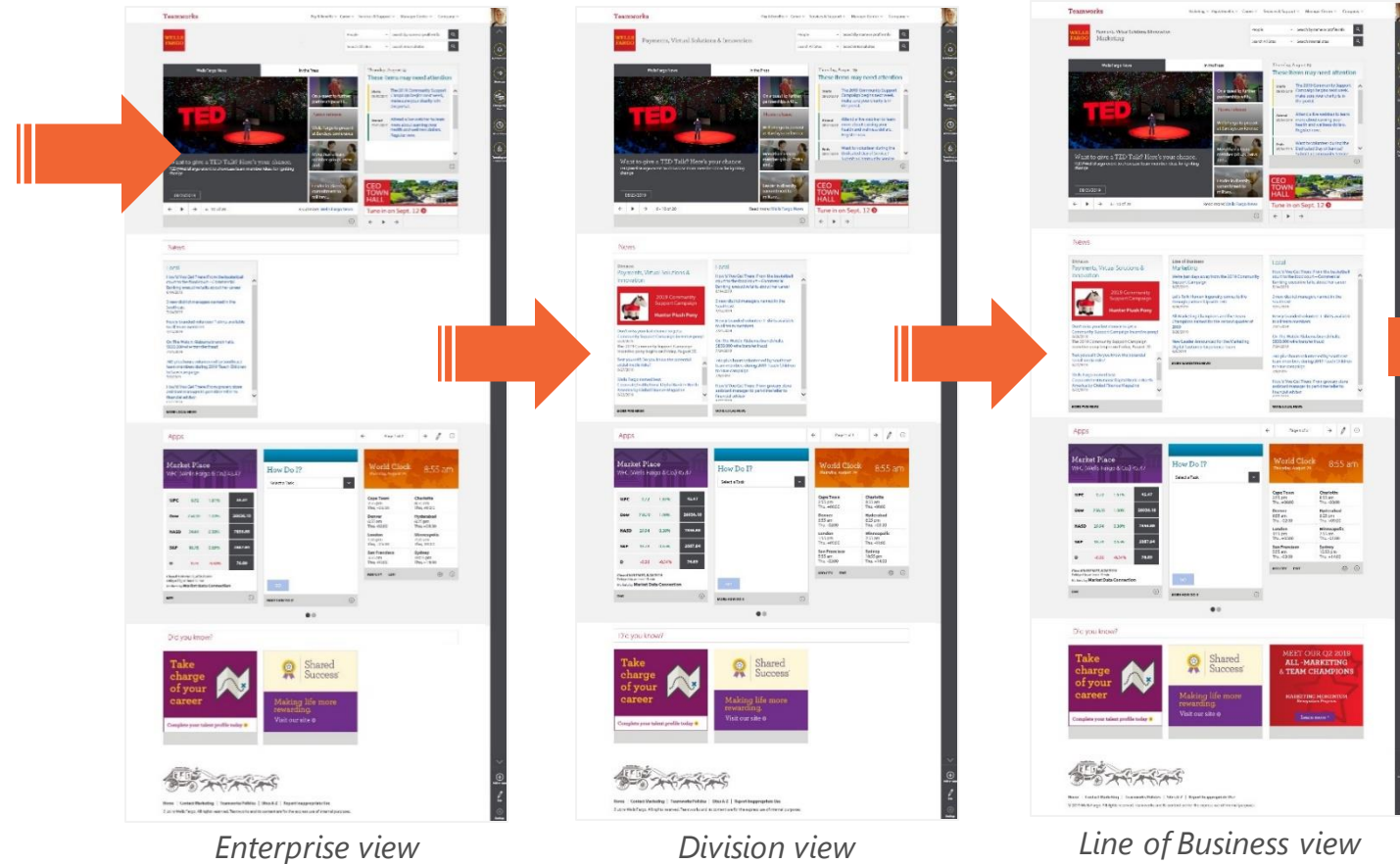


HR is adding  
'Manager News'  
to the news carousel

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')



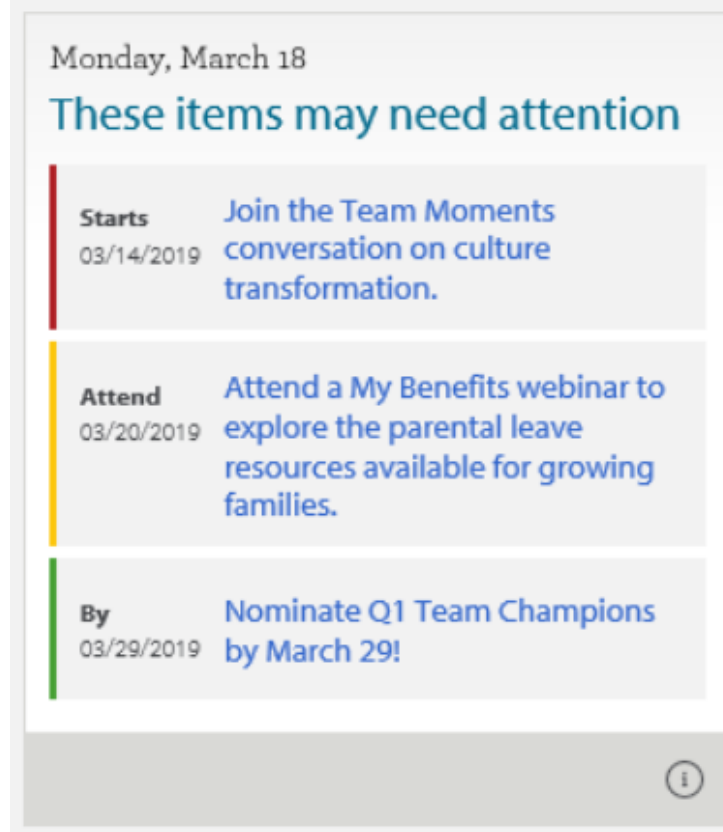
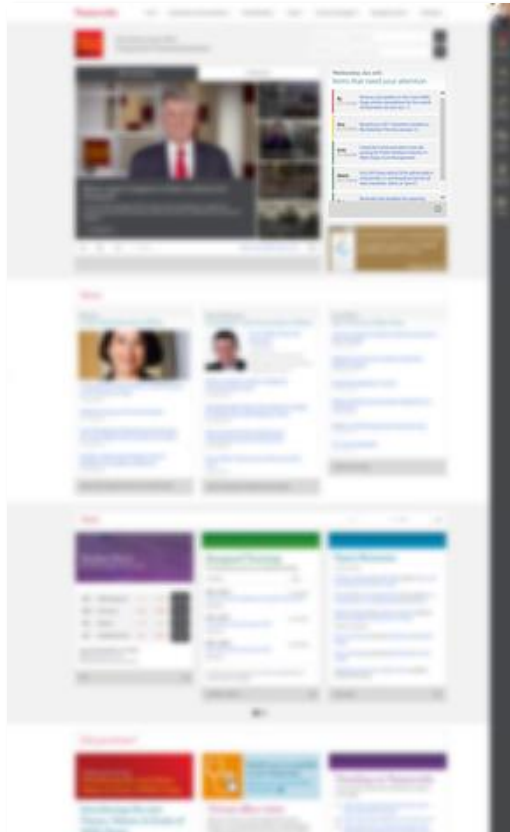
~15 min. x 1  
home page =  
15 min.

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

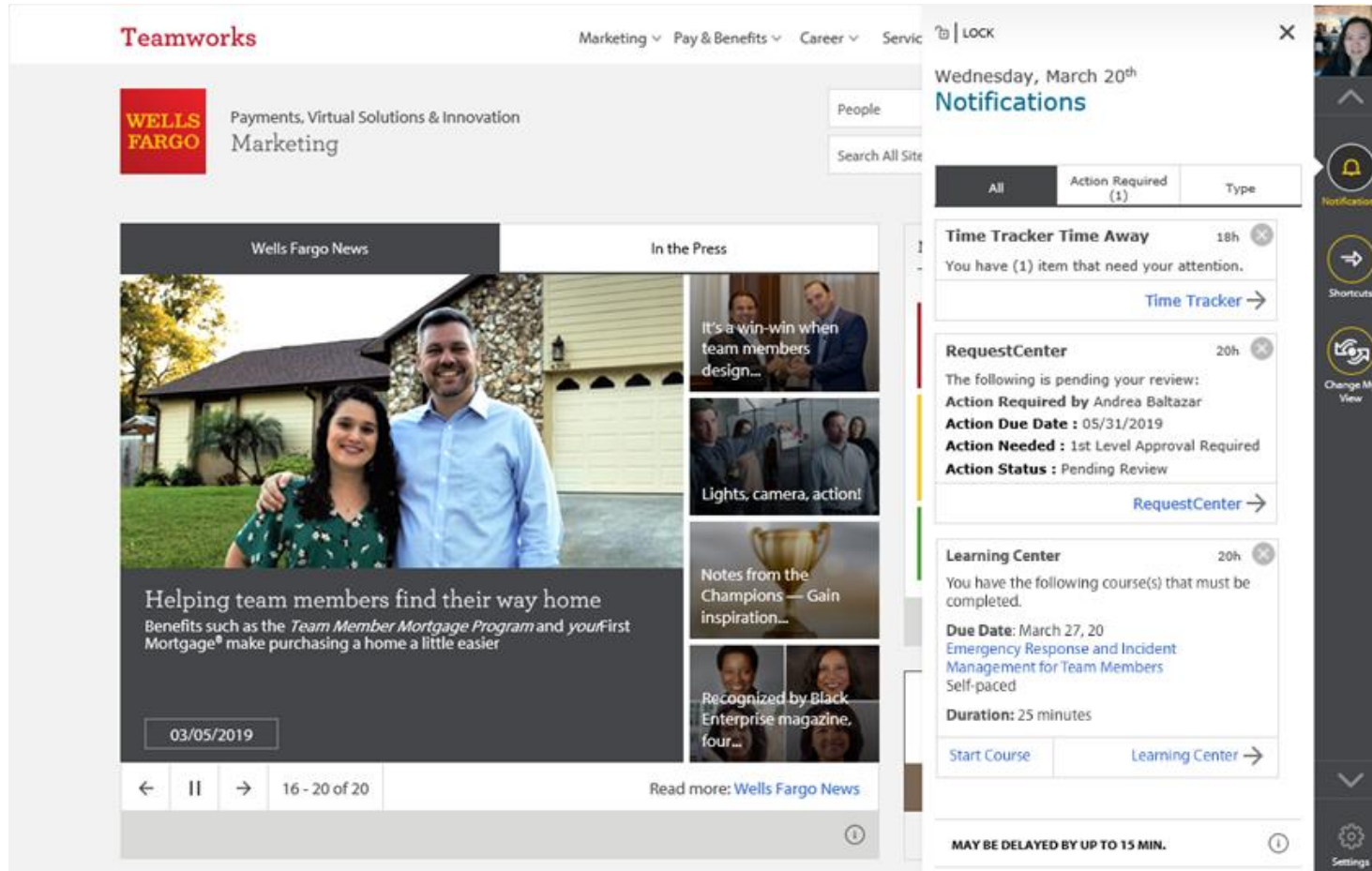
"It works! When I posted a critical communication in My Day instead of using a banner promotion, I had six times the amount of clicks."

—Happy Line of Business Communicator



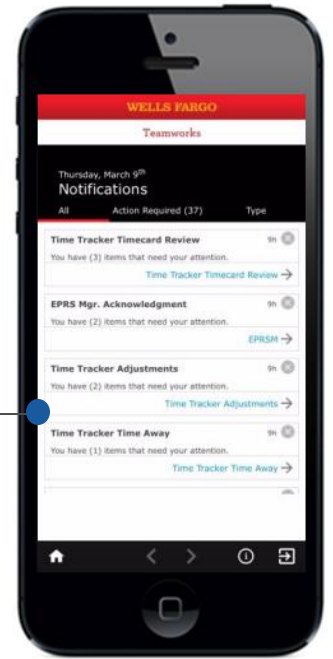
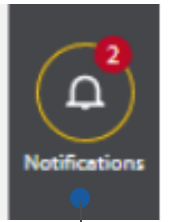
# Notifications

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



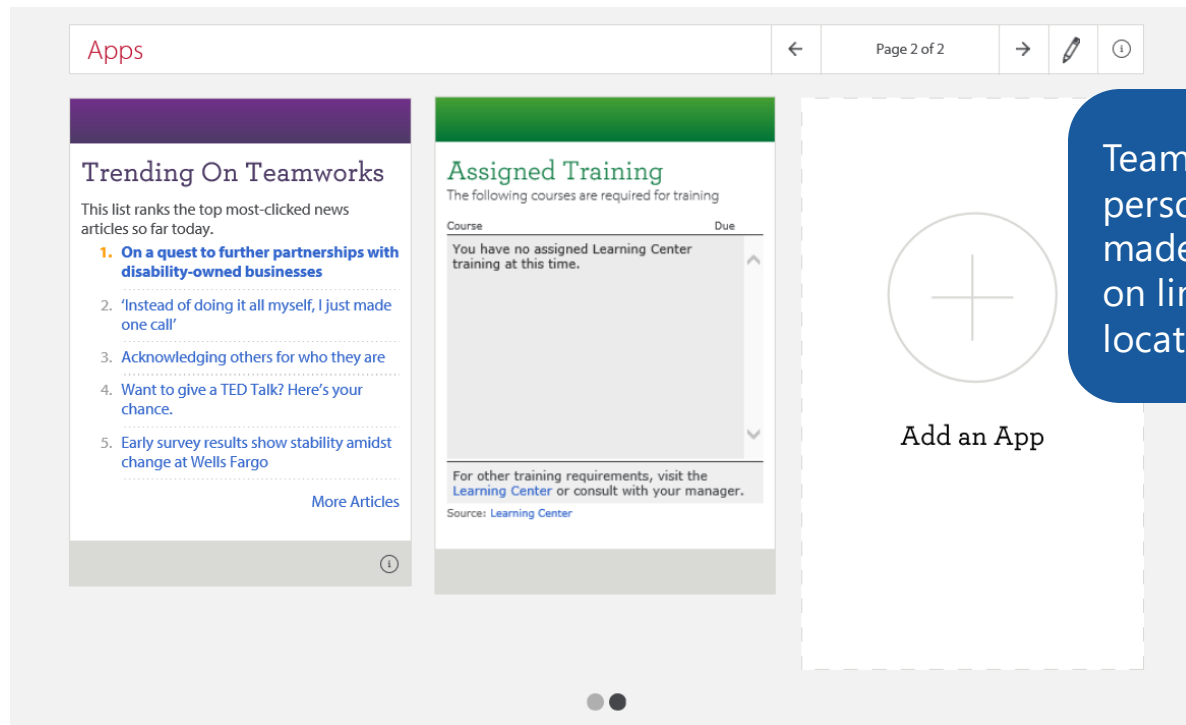
Number badge displays when team member has new notifications

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



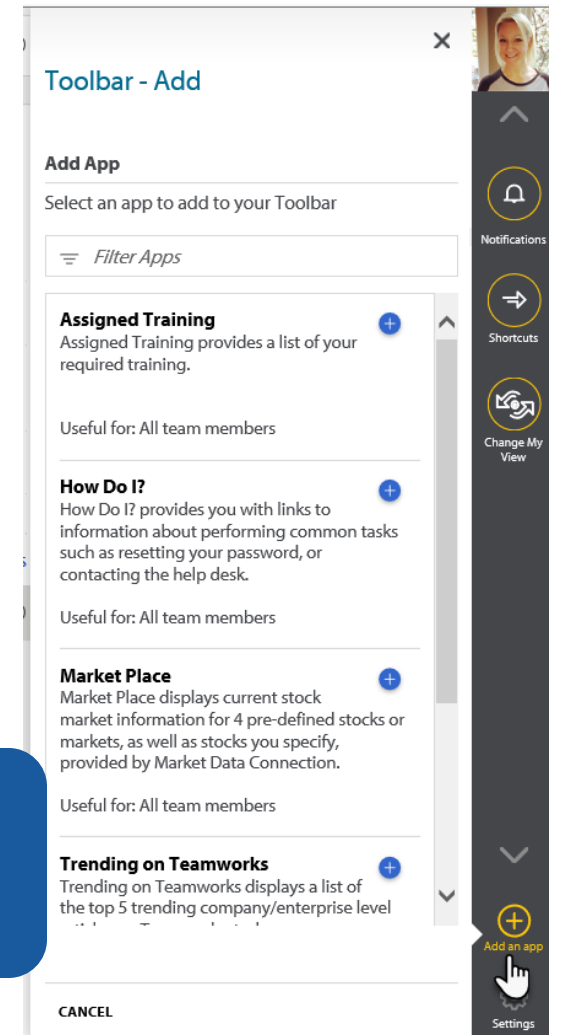
# Team members want to customize the home page

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?**

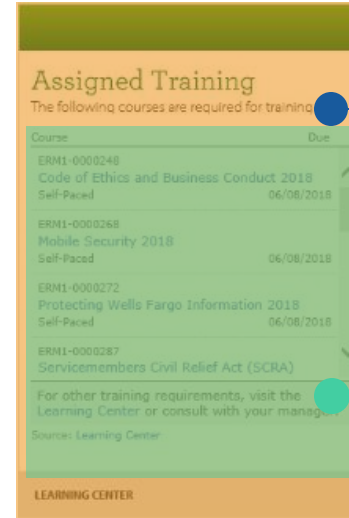
**With one team!?!?**

# 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



Teamworks  
framework

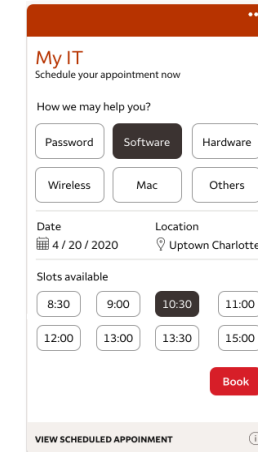
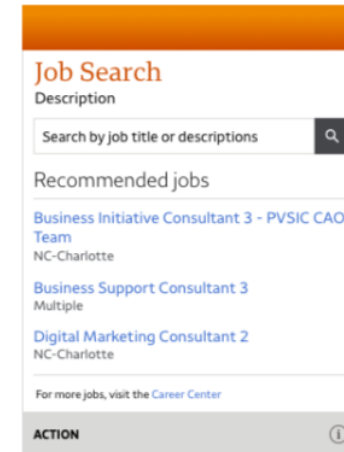
Application  
built outside of  
Teamworks

## 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

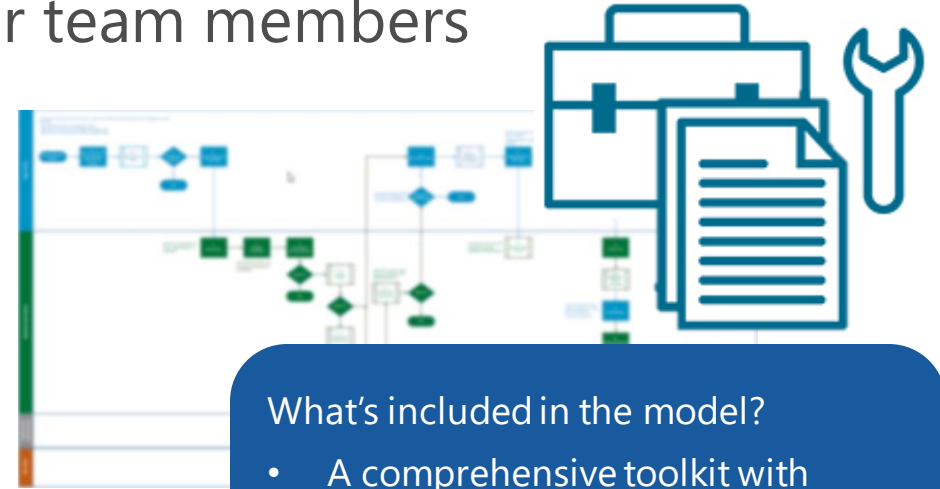




# Managing risk with a governed app model

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

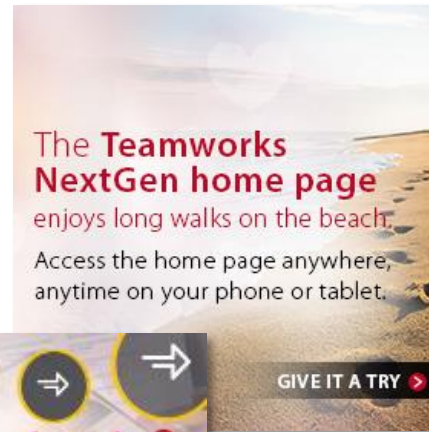


What's included in the model?

- 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)



**Teamworks NextGen** 2d

Answer the question below about the [new home page](#) and get an entry in a drawing for a \$25 Visa gift card.

**What would you change about the new home page that would make it better? :**

[View the full contest rules and regulations.](#)

[Submit Response](#)

**Teamworks NextGen** 8d

Welcome to your [new home page](#)! Tell us what you think by answering the question below, and be entered in a drawing for a \$25 Visa gift card.

**What do you LOVE most about the new home page? :**

[View the full contest rules and regulations.](#)

**Teamworks NextGen** 7d

Tell us if you agree or disagree with the following statements about the [new home page](#), and receive an entry in a \$25 Visa gift card giveaway.

**I had no trouble finding Shortcuts :**

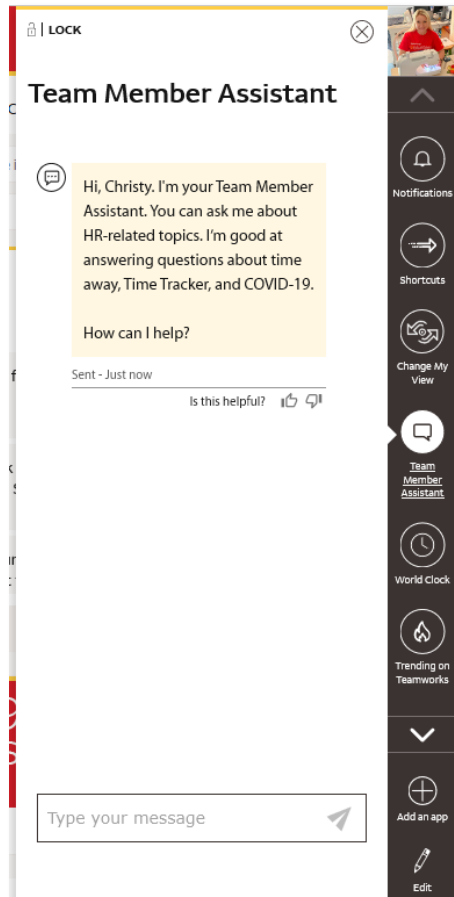
☐ Agree

☐ Disagree

☐ No opinion

1 of 5

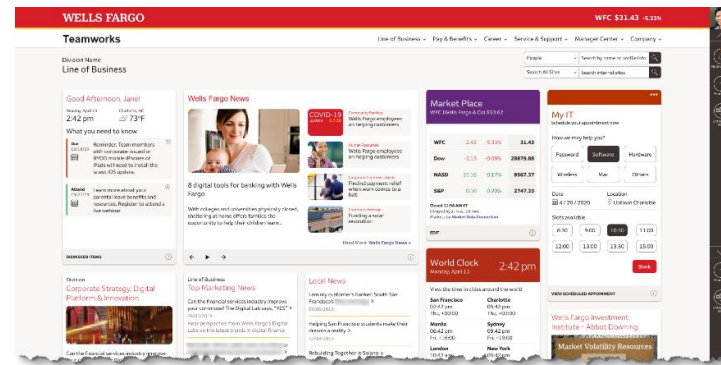
# What we are working on now...



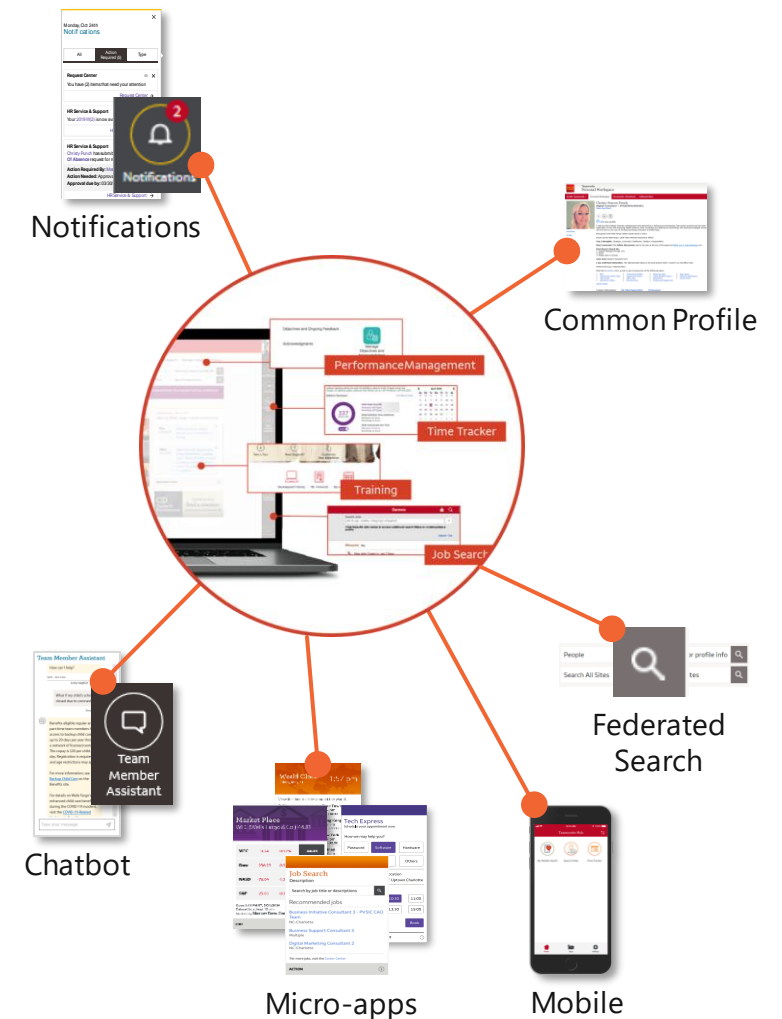
**Piloting internal chatbot**  
Focused on HR topics



**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

 @christyseason

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



# 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

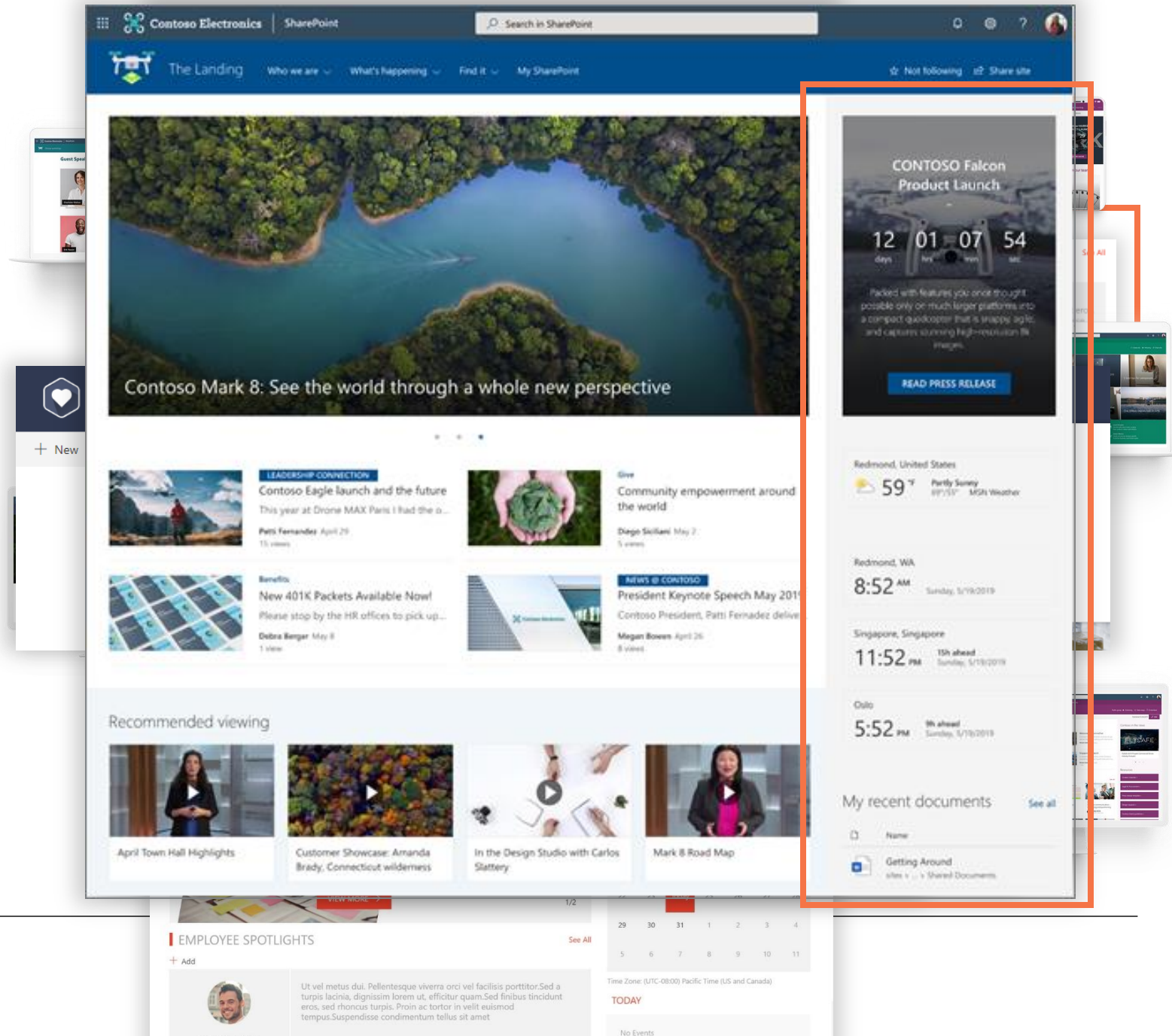


## Modern Experiences

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



A photograph of two men sitting on a white sofa on a stage, engaged in a discussion. The man on the right is wearing glasses and gesturing with his hands while speaking. The man on the left is listening. The background is a blue wall with a large white hashtag symbol and an arrow pointing right. A small potted tree is visible behind the man on the right. The entire image is overlaid with a semi-transparent blue filter.

# 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

متشكرم

Salamat Po

감사합니다

Cám ơn

شكريه

Terima Kasih

Dank u Wel

Děkuji

நன்றி

Köszönöm

ありがとう  
ございます

ឧបត្ថម្ភ

Dziękuję

谢谢

Tack

Mulțumesc

спасибо

Merci

תודה

多謝晒

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धन्यवाद



# Business Continuity & Productivity

IN THE DIGITAL WORKPLACE

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