

Habanero Consulting Group

STRATEGY MASTER SKILLS

PLANNING A MEANINGFUL DIGITAL WORKPLACE

April 4, 2019

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Hello



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Director, Products and Services



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Senior Consultant

Today's takeaways

- Why should you approach the “what tool when” problem strategically?
- What does a strategic process look like, and what is the ultimate deliverable?
- How could you go about doing the work?



Bringing life to work

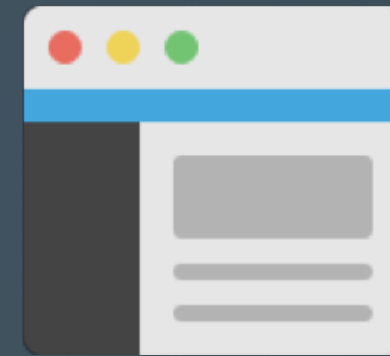
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Helping humanize the workplace



**CULTURE AND
TRANSFORMATION**



**DIGITAL WORKPLACE
SOLUTIONS**

We are hiring!

Who do we have in the audience today?



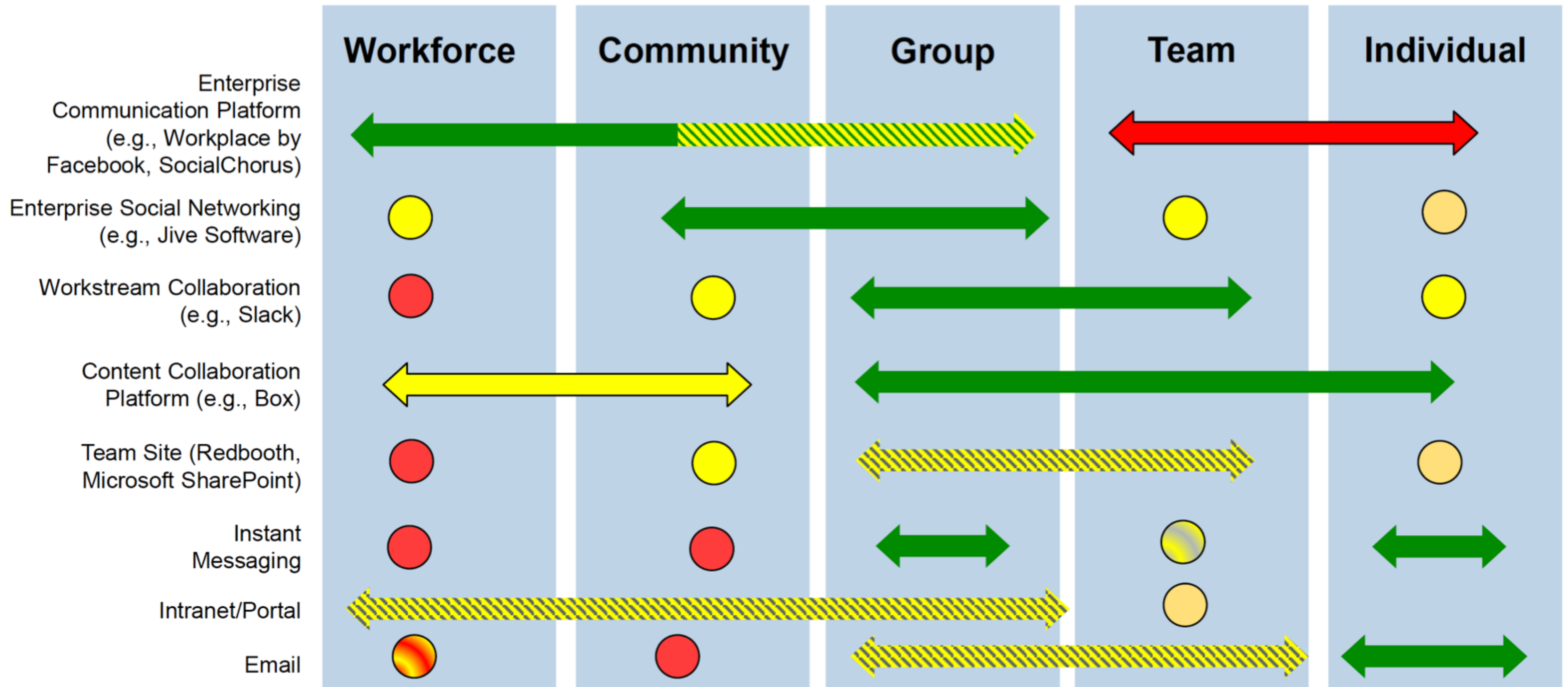
Why strategic planning for the digital workplace?

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Collaboration: A Spectrum of Activities



Mapping Audiences to Tool Categories and Capabilities



“

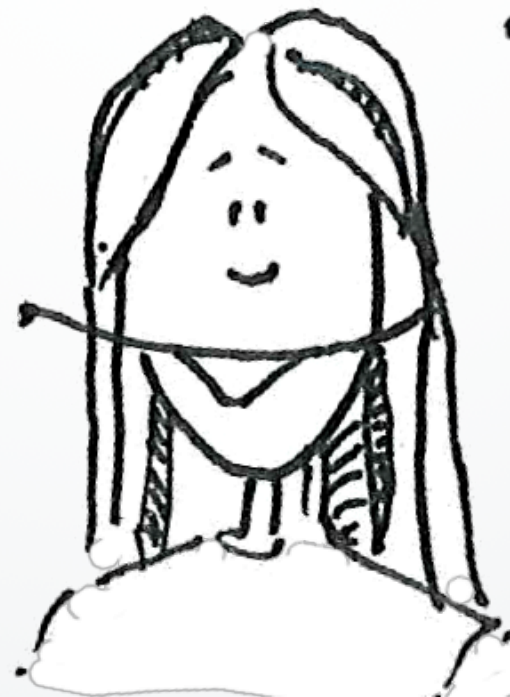
Provide and pray won't work. Hope is not a strategy.

—Gartner, “How to help users pick the right tool to collaborate in.”

I just got my
process working
like a well-oiled
machine, and now
IT want's me to
change?!

So many new tools!
But I don't know how to
fit them into my work.

Do we really need
this many places to
put documents?



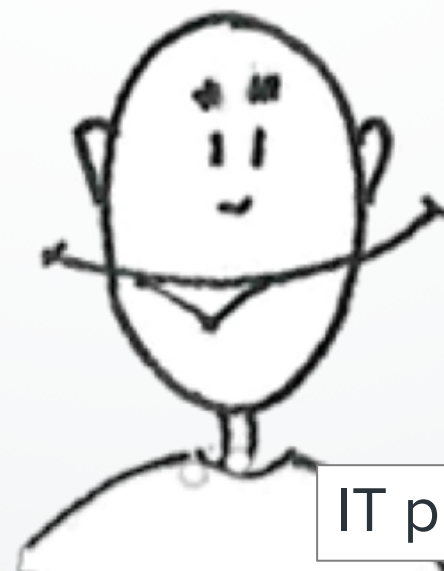
employee

habanero

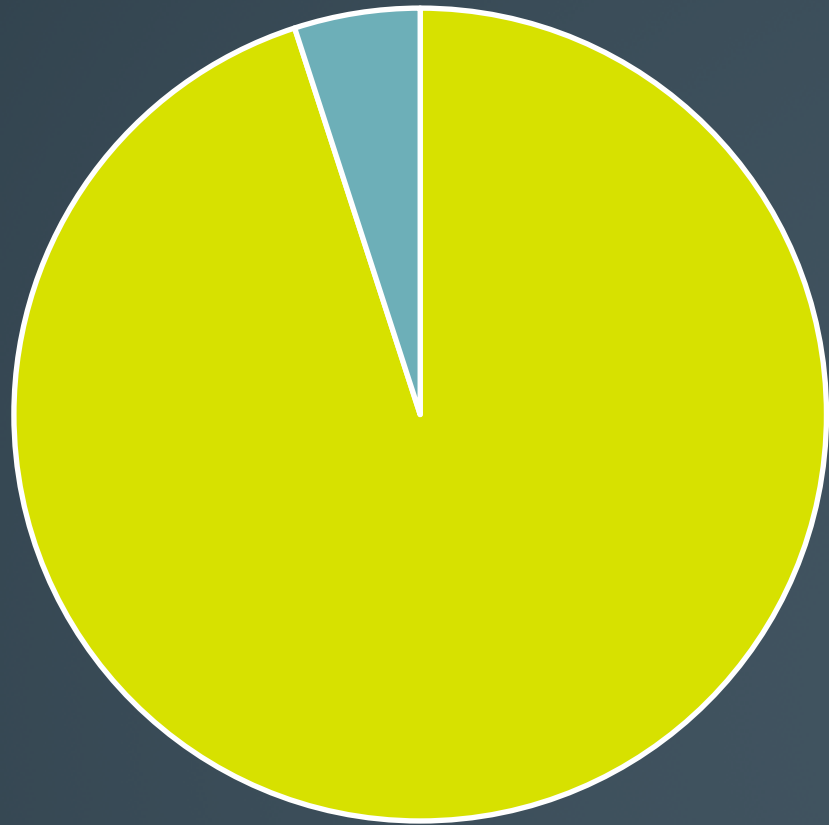
How do I know
which tools will be a
good investment for
the business?

We need to
upgrade, or we will
get left behind.

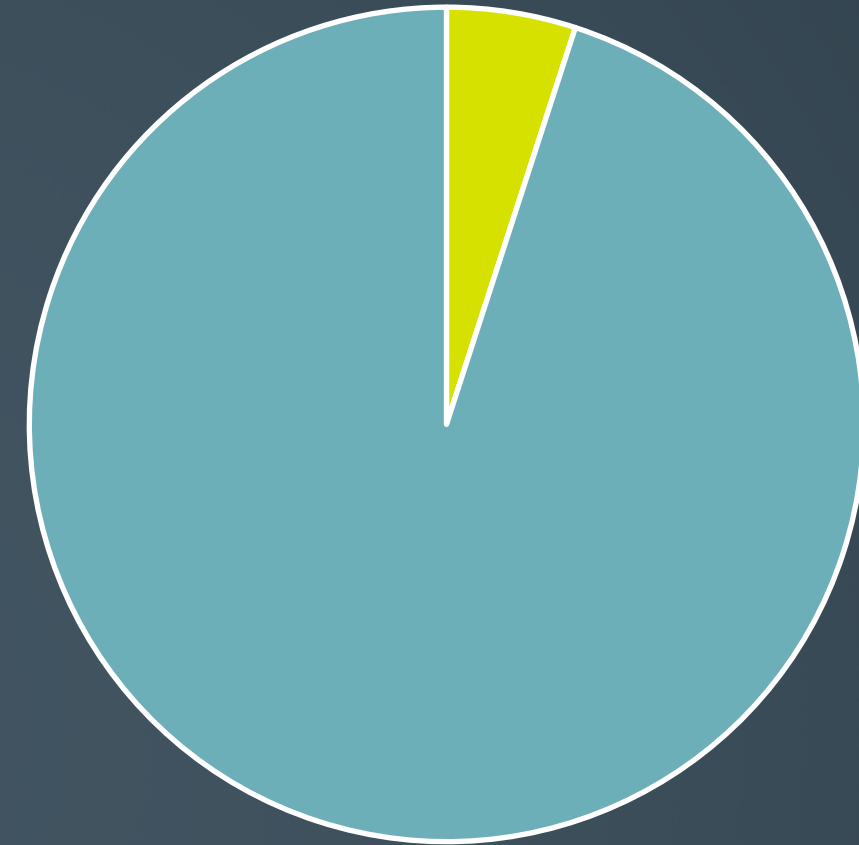
We give people the
tools, but then
nobody uses them,
and they still
complain!





IT professional



*How much time we spend
thinking about the how,
when and why of using
new tools*



*How much time your
average end-user spends
thinking about this*

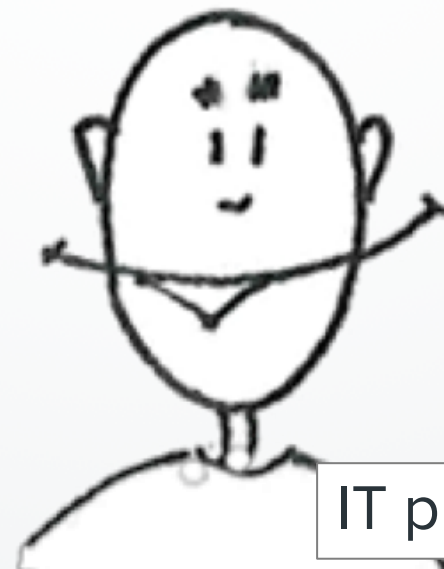
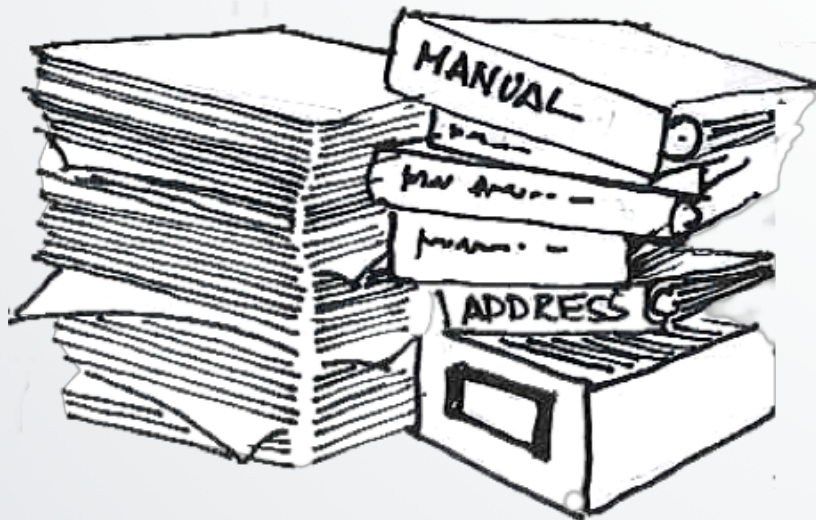
-  Time spent thinking about tools.
-  Time spent thinking about everything else.

What tool when?

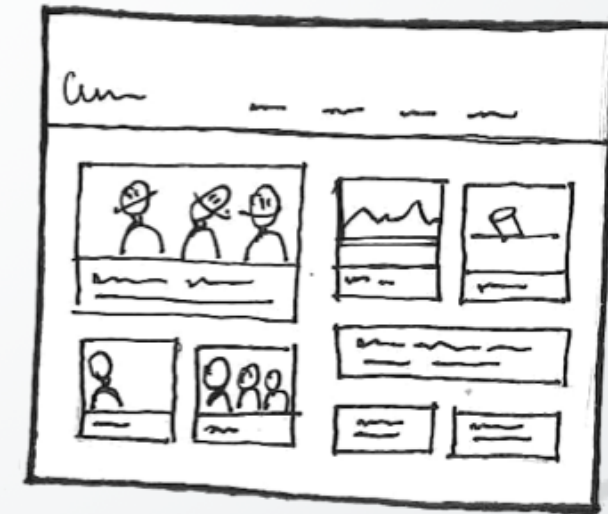
Yammer is for
talking to
everyone...
but I can also put
some documents in
there.

Teams could work
for projects...
but not ALL
projects.

OneDrive is handy
for stuff I'm working
on with others...
but other stuff
should be in
SharePoint.



IT professional





What tool, when?

**What are the
frustrations and
opportunities to help
people work better?**

Office 365 Management

We need to upgrade to SP 2016
What features do we enable?

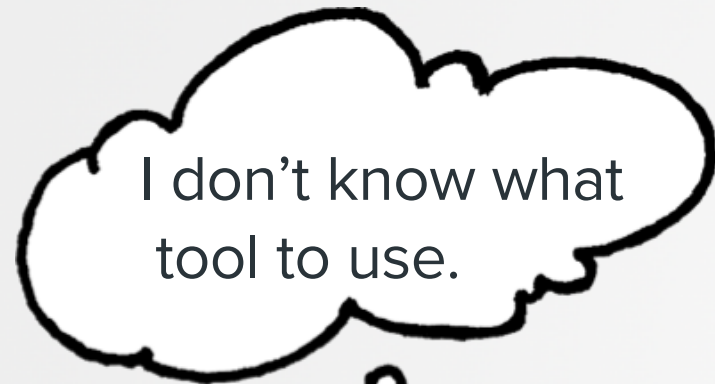
I don't know what tool to use.

Our dept. has unique needs, custom design.

Hey IT. I can't find my stuff!

The CEO wants a blog, yesterday!

We need to share with external vendors.





**Target
practice
instead of
Whack-a-mole**

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A new hope!

“

**Strategy, not technology, drives
digital transformation.**

—MIT Sloan Management Review, Deloitte Digital Press

Building a digital workplace roadmap...

Improvement Road Map

PHASE ONE FINDING INFORMATION										PHASE TWO CONNECTING TO URBAN										PHASE 3 INTERNAL PROCESSES									
WORKSPACE EXPERIENCE OVERVIEW										WORKING ANYWHERE										REVIEWING									
Journey										REVIEWING										REVIEWING									
Description										Description										Description									
Opportunity Sketches (preliminary solutions sketches - each area will require further investigation)										Opportunity Sketches (preliminary solutions sketches - each area will require further investigation)										Opportunity Sketches (preliminary solutions sketches - each area will require further investigation)									
Experience touchpoints and actions (interactions, communications, training, adoption supports, change management)										Experience touchpoints and actions (interactions, communications, training, adoption supports, change management)										Experience touchpoints and actions (interactions, communications, training, adoption supports, change management)									
Potential first steps										Potential first steps										Potential first steps									
Value to Employee										Value to Employee										Value to Employee									
Audience size										Audience size										Audience size									
Change aptitude										Change aptitude										Change aptitude									
Business Impact										Business Impact										Business Impact									
Effort (Time and effort for the Urban Systems technology team)										Effort (Time and effort for the Urban Systems technology team)										Effort (Time and effort for the Urban Systems technology team)									
Cost (Hiring external expertise or technology cost)										Cost (Hiring external expertise or technology cost)										Cost (Hiring external expertise or technology cost)									
Key metrics (How well we know we are successful?)										Key metrics (How well we know we are successful?)										Key metrics (How well we know we are successful?)									
People and roles (Which people and processes need to be in place to make this feature successful?)										People and roles (Which people and processes need to be in place to make this feature successful?)										People and roles (Which people and processes need to be in place to make this feature successful?)									
Processes										Processes										Processes									
Information and data considerations										Information and data considerations										Information and data considerations									
Best practices or rules										Best practices or rules										Best practices or rules									
Technology (What technology could support the journey?)										Technology (What technology could support the journey?)										Technology (What technology could support the journey?)									
Office 365 (Microsoft Cloud)										Office 365 (Microsoft Cloud)										Office 365 (Microsoft Cloud)									
Office (Word, PPT, Excel etc.)										Office (Word, PPT, Excel etc.)										Office (Word, PPT, Excel etc.)									
Groups										Groups										Groups									
Team sites										Team sites										Team sites									
Yammer										Yammer										Yammer									
One (external platform)										One (external platform)										One (external platform)									
SharePoint Extranet (on prem.)										SharePoint Extranet (on prem.)										SharePoint Extranet (on prem.)									
SharePoint search										SharePoint search										SharePoint search									
SharePoint intranet (on prem.)										SharePoint intranet (on prem.)										SharePoint intranet (on prem.)									
My Sites										My Sites										My Sites									
"Pulse" intranet										"Pulse" intranet										"Pulse" intranet									
SharePoint search										SharePoint search										SharePoint search									
Workflow tools (e.g. Nintex)										Workflow tools (e.g. Nintex)										Workflow tools (e.g. Nintex)									
Mark-up tools (e.g. Bluebeam)										Mark-up tools (e.g. Bluebeam)										Mark-up tools (e.g. Bluebeam)									
Analytics tools (e.g. Google analytics)										Analytics tools (e.g. Google analytics)										Analytics tools (e.g. Google analytics)									
Stack?										Stack?										Stack?									
Tech roles										Tech roles										Tech roles									
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Tech roles																													

Case Study

The building of a roadmap

400+ employees

14 offices

1200+ projects



Stated Problem:
***How we experience the service of IT
within the organization is not working.***

1



Understand the organization's pains, goals, and priorities

2



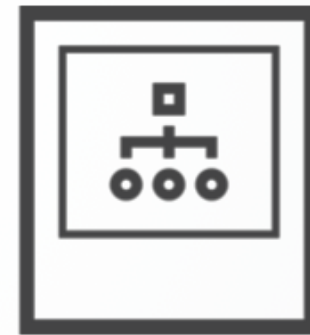
Capture today's experience

3



Create the future experience

1

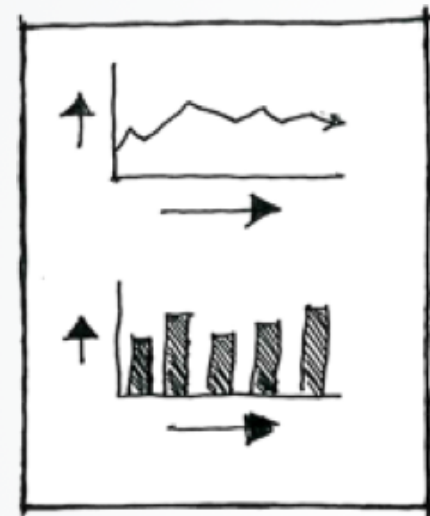


***Understand the organization's
pains, goals, and priorities***



Interviews and
listening labs

+



Usage and
analytics insight

+



Environment
landscape

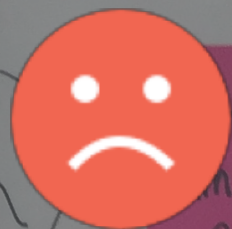
+



Stakeholder
viewpoints



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GRAPHICS
improve
2 weeks.

WEBEX
LIMITED
SUCCESS.
Joining

WEBEX
(sad face icon)

MEETING
REQUEST

Lack of
People
Data
Management
System(s)
or too many
Locations.

TIME
SHEETS
(sad face icon)

DELTEK.
DELTEK.
USER
INTERFACE

EXPENSES
> APP FOR THAT
TAKE PHOTO OF
RECEIPT
e-mail
- selective about

- MEETING -
5 MIN BEFORE
10 MIN FIRST
15 MIN @ END.
- COME PREPARED,

CISCO (sad face icon)
HAS
BEEN
LAGGY.

PICTURES
FOR (sad face icon)
PROPOSALS
(POOR FINDABILITY)

KNOWLEDGE
RESOURCES
ABOUT (sad face icon)
PEOPLE.
(POOR FINDABILITY)

FINANCIAL
PROJECT
MGMT Tools.
EXTERNAL +
INTERNAL.

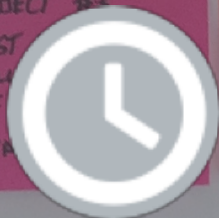
NO MORE
PUSHING
PAPER
ie resending
Info to outside
clients.

ACCESS
DATA
WHERE EVER
WHEN EVER

KEEPING PROJECT
INFO & LESSON'S
LEARNED TOGETHER

TIMESHEETS
PROJECT #
LAST
BILL
OF
MATERIALS

TIME ENTRY
ANNOUNCE
NOT A PRIORITY



Most time spent
Worst experience

INTERNET
CONNECTION
SLOW
FROM VANCOUVER

24RS/DAY!
COMPLAINTS
ABOUT
SPEED IN
CAD/GIS

FAIL OVER
JSPs
(FT. HARRIS)

INCONSISTANT
REVIEW
PROCESS.

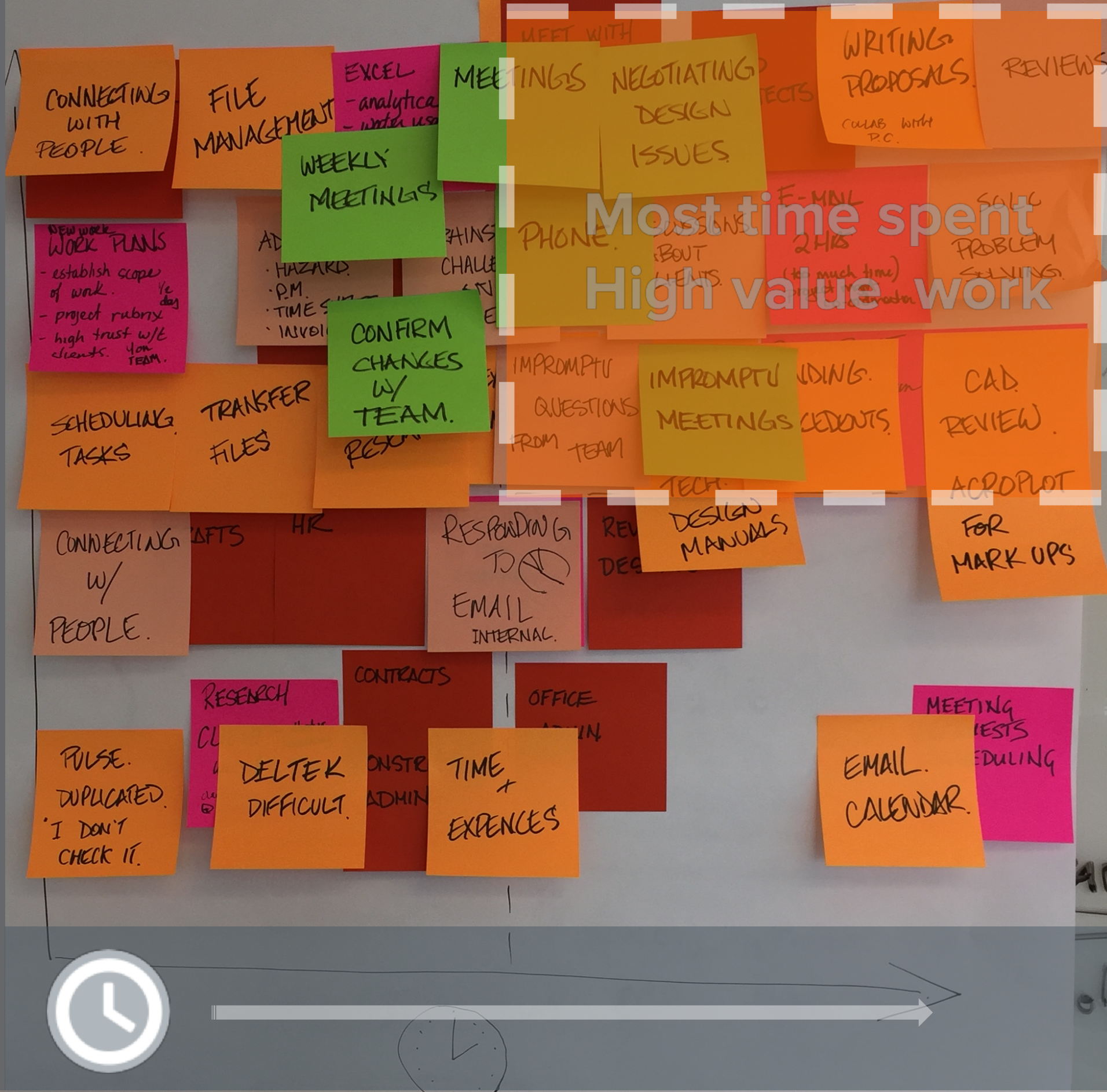
Time Loss Due
to Hardware
Failure.

SLOW
CAD
(FROM VANCOUVER)
TO FT. HARRIS

Employee's pain
points



VALUE



Employee's work



Workplace themes



Shadow IT



Difficulty with data



Inefficient process




Poor findability




Workplace themes


IMPACT




AUDIENCE



EFFORT



CHANGE READINESS



Inefficient process

Poor findability

THERE'S A NEW TOOL THAT
COULD REALLY HELP US WITH
THIS PROJECT. I THINK WE
NEED TO FIGURE OUT
GET IT, PROCESS IT,
MANIPULATE IT WITH MY



ity with data

CAN'T FIND THAT
DOCUMENT I NEED!...
EVEN WHEN I FIND
I'M NOT SURE IF
I'VE FOUND THE RIGHT
ONE! I'M SO
Frustrated AT THE
TIME I'VE SPENT, AND
I'M STILL UNSURE.
(SIGH...)



2



Capture today's experience

MEET OUR NEW EMPLOYEES
ANDREW AND REBECCA

GOALS & TASKS

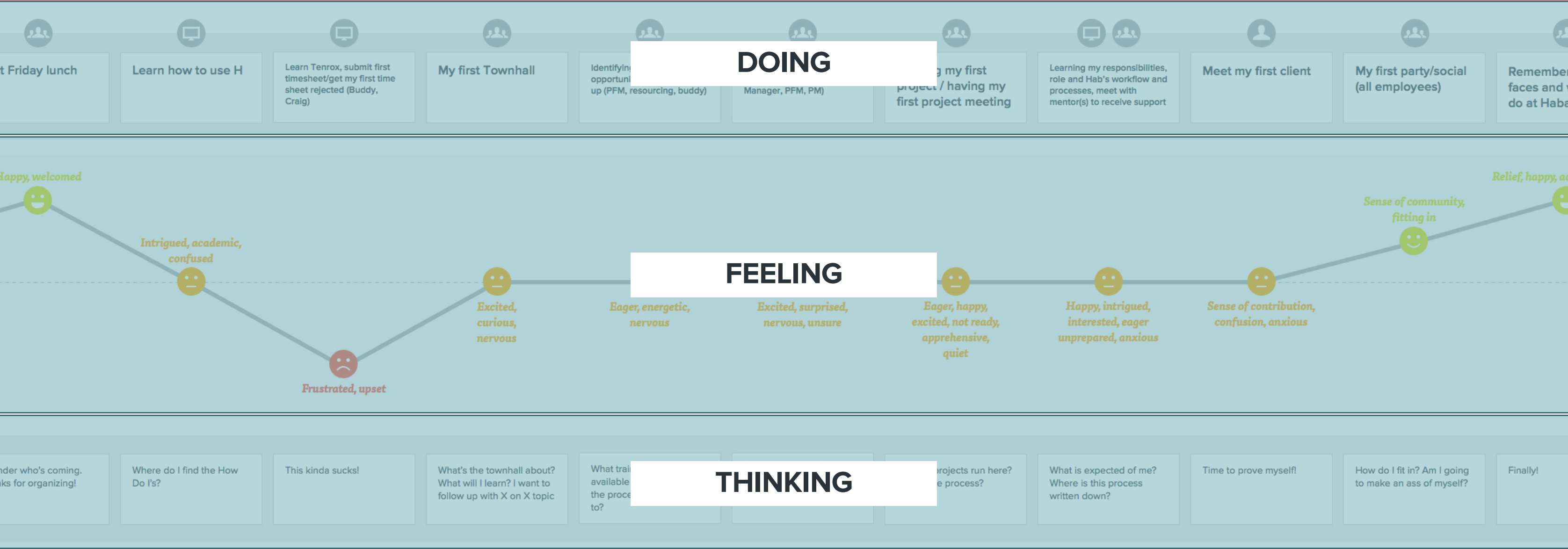
- Ramp up on Hab knowledge and accountabilities
- Fitting in with the company and the people in it
- Complete the onboarding task(s)



MOTIVATIONS

- Get hired at Habanero
- Complete three month probation period
- Reach billable full-time capacity (reduce T&D time)
- Produce the best work possible

ONBOARDING



Employee experience journey mapping

3 workshops

2 hours each

6-7 participants each





Workshop kit

- Invitation and description of why we need their unique insight
- Journey map templates
- Sticky notes
- Sticker sheet of emotion words

“ I spend too much time trying to find the historical information that I need.



look in project
folder: Z reference
Reports

look in
client
folder

Search library
on the
Pulse

Search Physical
library

Seek out
person related
to the old
Project....



ready
for a struggle



hopeful



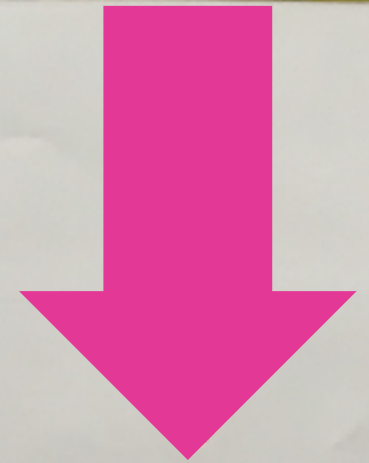
distrustful.

defeated



lost
hopeful
effort

desperate.



• this isn't going to
go well, but
maybe I'll get
lucky?

• Search for Keywords
rather than
Sift through
folders.
Z reference?
P reports?

• expand possible
keywords, dates
file was created.
• I don't like the
library interface on
the Pulse

I'm not sure of the
title, so maybe
scanning the shelves
will uncover something

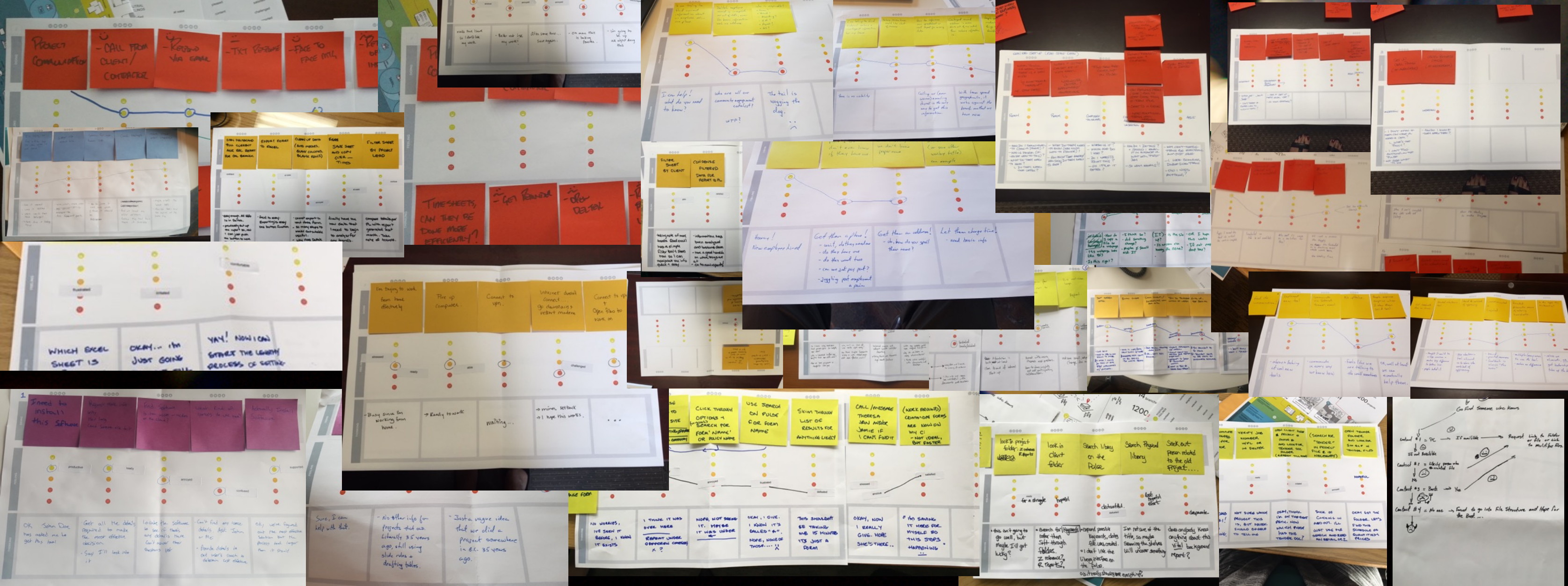
does anybody know
anything about this
vital background
report?

“ When we can’t find a report we created we go to the municipality where we submitted it and pay them \$50 to give us a version of our own report. It’s embarrassing.

Employee



20 journey maps



Consultant and employee experiences

- Project communication
- Timesheets
- Finding project precedents/history
- Webex
- Getting to a document remotely
- Finding data
- Working from home
- Cleaning up data
- Finding forms
- Onboarding

IT team experiences

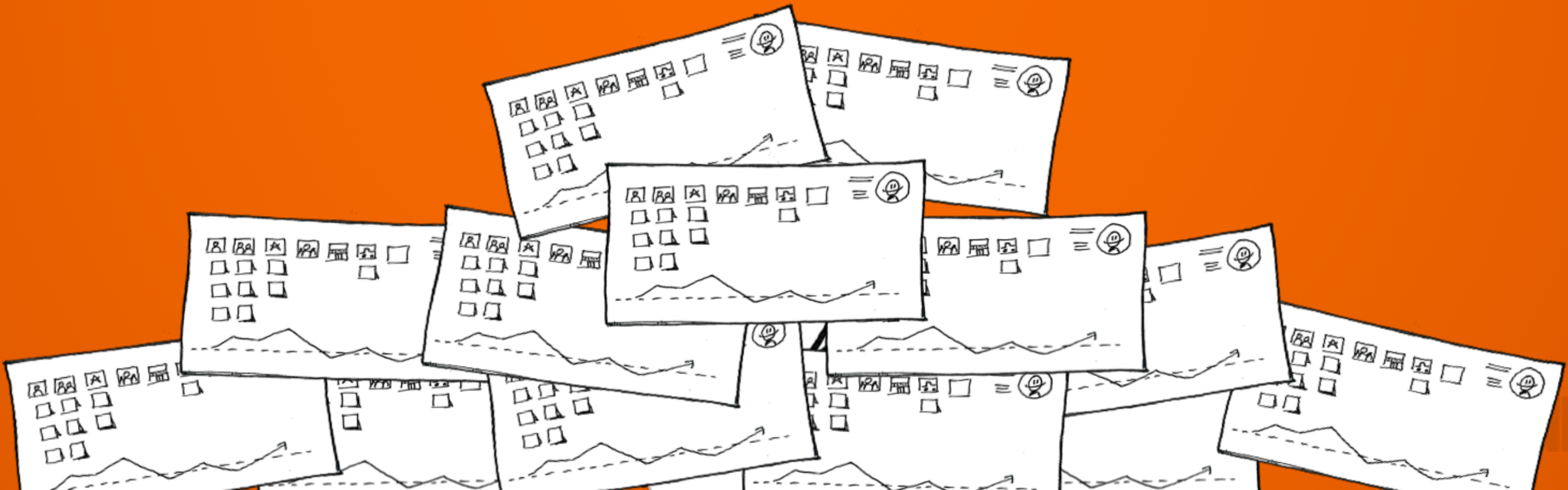
- FTP site
- Software install
- Finding a file
- Lack of new tech uptake
- Timesheets
- Finding info about an employee
- Finding employee salary
- Finding old project data

3



Create the future experience

How to make sense of all of these?



IMPACT



AUDIENCE



EFFORT



CHANGE READINESS



Business impact

Audience size

Effort

Change readiness



Leveraging
past work

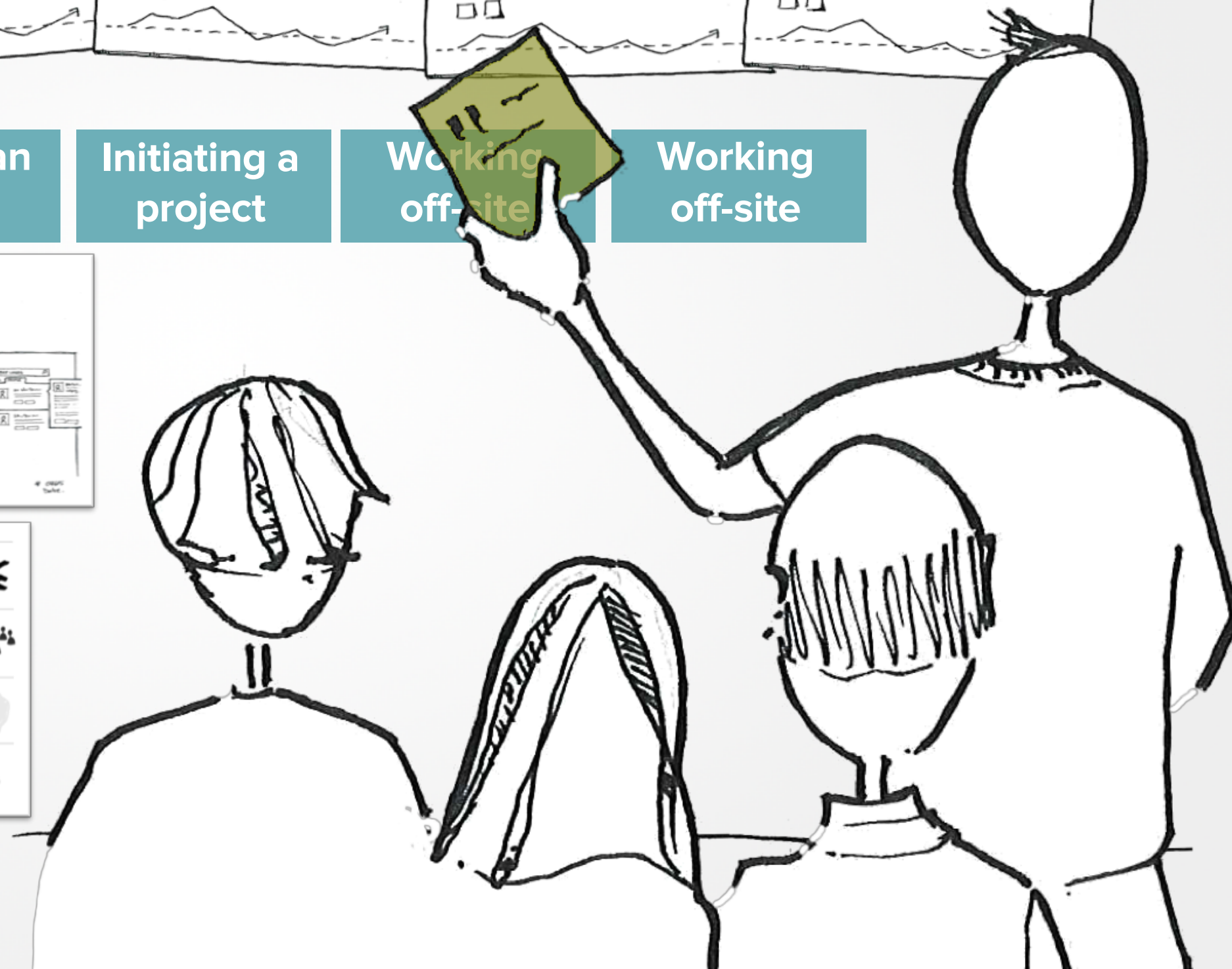
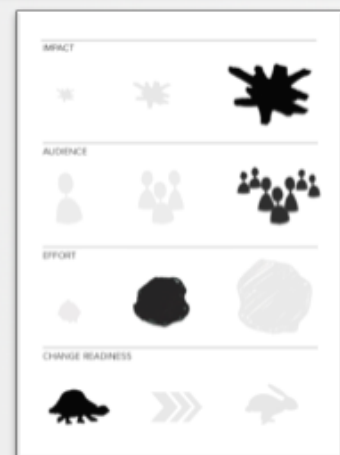
Finding
templates

Finding an
expert

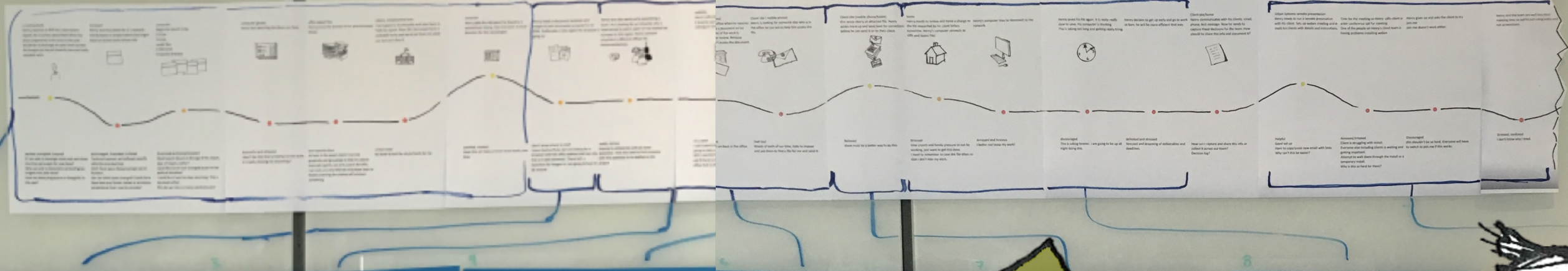
Initiating a
project

Working
off-site

Working
off-site



Prioritized a grouped into phases



LEVERAGING PAST WORK

FINDING TEMPLATES AND IMAGES

FINDING AN EXPERT

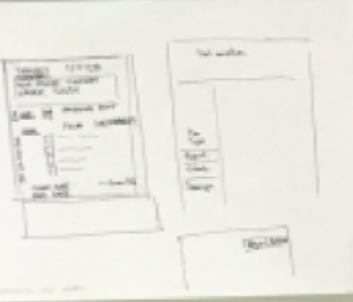
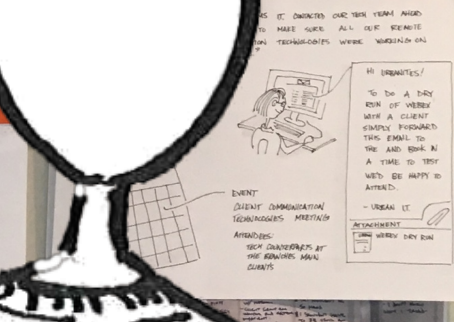
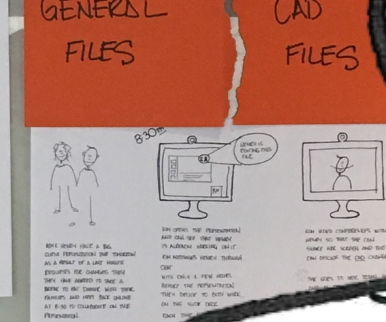
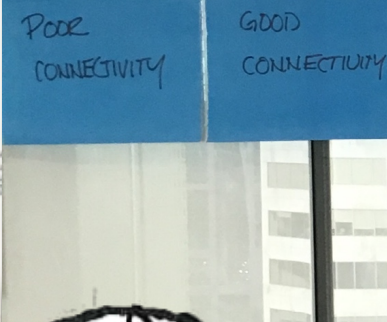
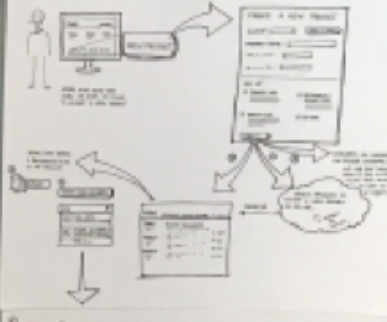
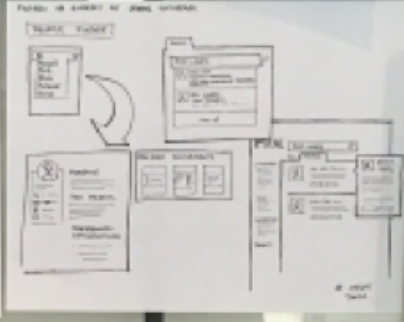
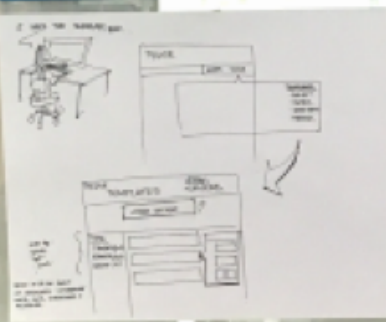
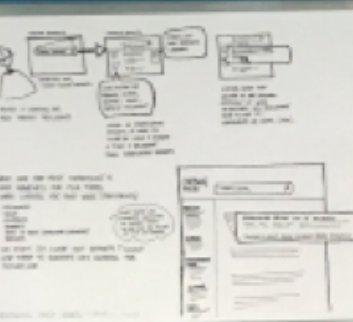
INITIATING A PROJECT

WORKING FROM A CLIENT SITE

REVIEWS AND MARK-UPS

WORKING FROM HOME

CLIENT INTIMATION



POTENTIAL TECHNOLOGIES AND/OR APPLICATIONS

- SUGGESTION TOOL TYPES
- SUGGESTION TOOL TYPES
- SUGGESTION TOOL TYPES

\$\$\$

POTENTIAL TECHNOLOGIES AND/OR APPLICATIONS

- SUGGESTION TOOL TYPES
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POTENTIAL TECHNOLOGIES AND/OR APPLICATIONS

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POTENTIAL TECHNOLOGIES AND/OR APPLICATIONS

- SUGGESTION TOOL TYPES
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- SUGGESTION TOOL TYPES

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POTENTIAL TECHNOLOGIES AND/OR APPLICATIONS

- SUGGESTION TOOL TYPES
- SUGGESTION TOOL TYPES
- SUGGESTION TOOL TYPES

EDUCATION - WHAT TO DO WHEN YOU ARE A DESIGNER UK.

POTENTIAL TECHNOLOGIES AND/OR APPLICATIONS

- SUGGESTION TOOL TYPES
- SUGGESTION TOOL TYPES
- SUGGESTION TOOL TYPES

GOOD CONNECTIVITY

POTENTIAL TECHNOLOGIES AND/OR APPLICATIONS

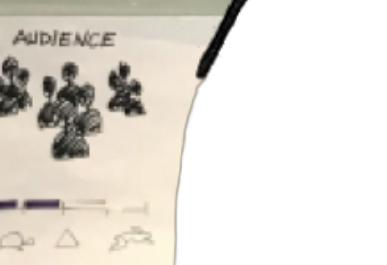
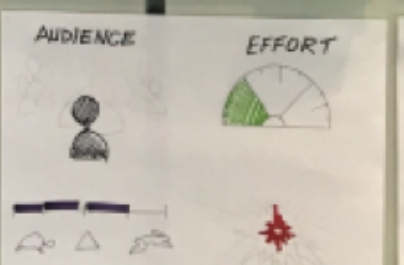
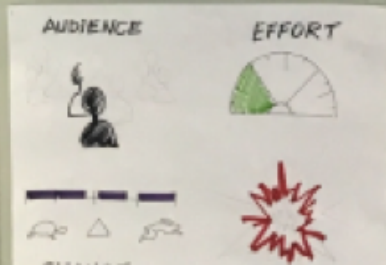
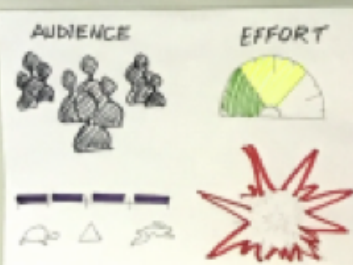
- SUGGESTION TOOL TYPES
- SUGGESTION TOOL TYPES
- SUGGESTION TOOL TYPES

GENERAL

POTENTIAL TECHNOLOGIES AND/OR APPLICATIONS

- SUGGESTION TOOL TYPES
- SUGGESTION TOOL TYPES
- SUGGESTION TOOL TYPES

AUDIENCE



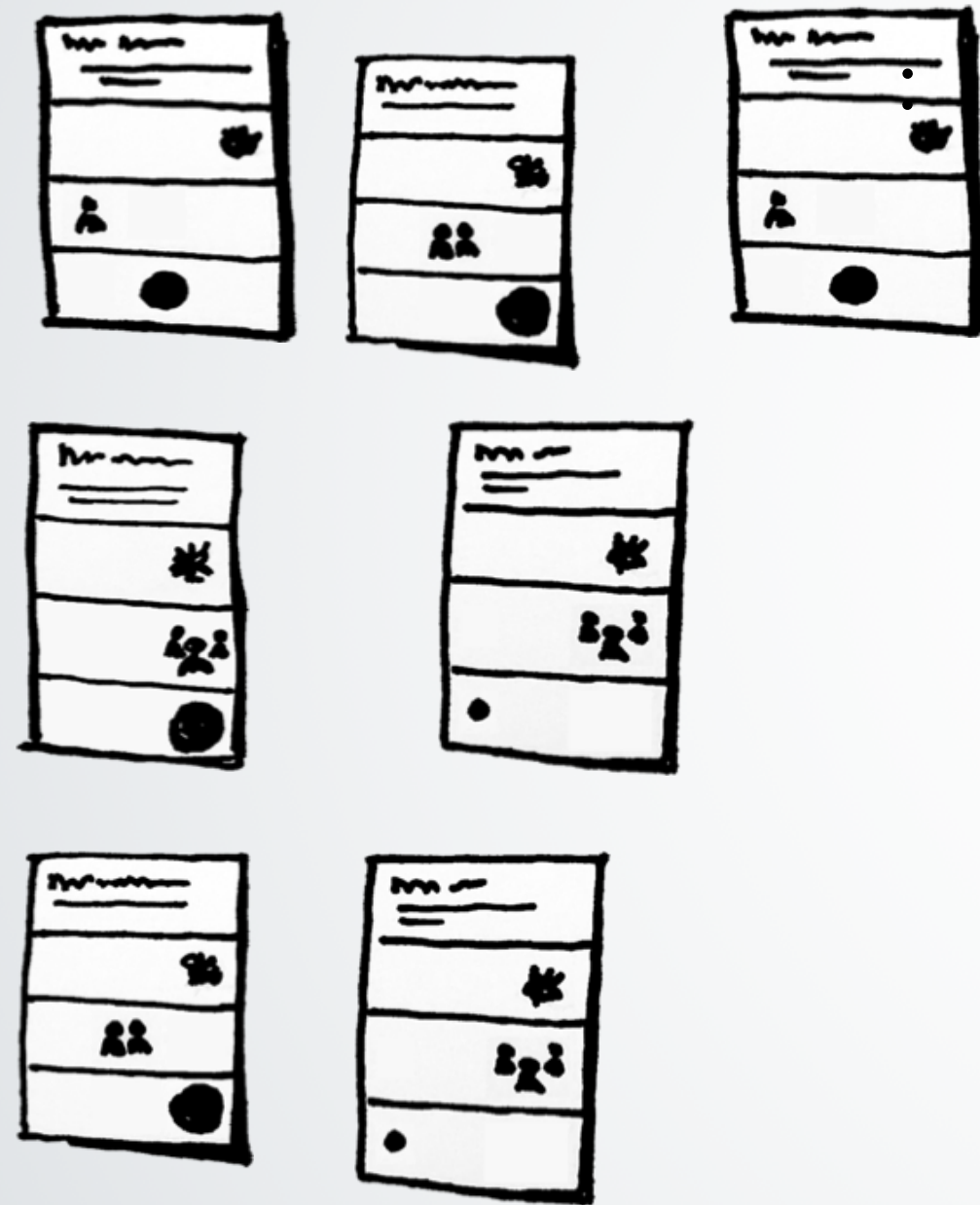
Now (high priority / MDP)

Next (next priority / evolve MDP)

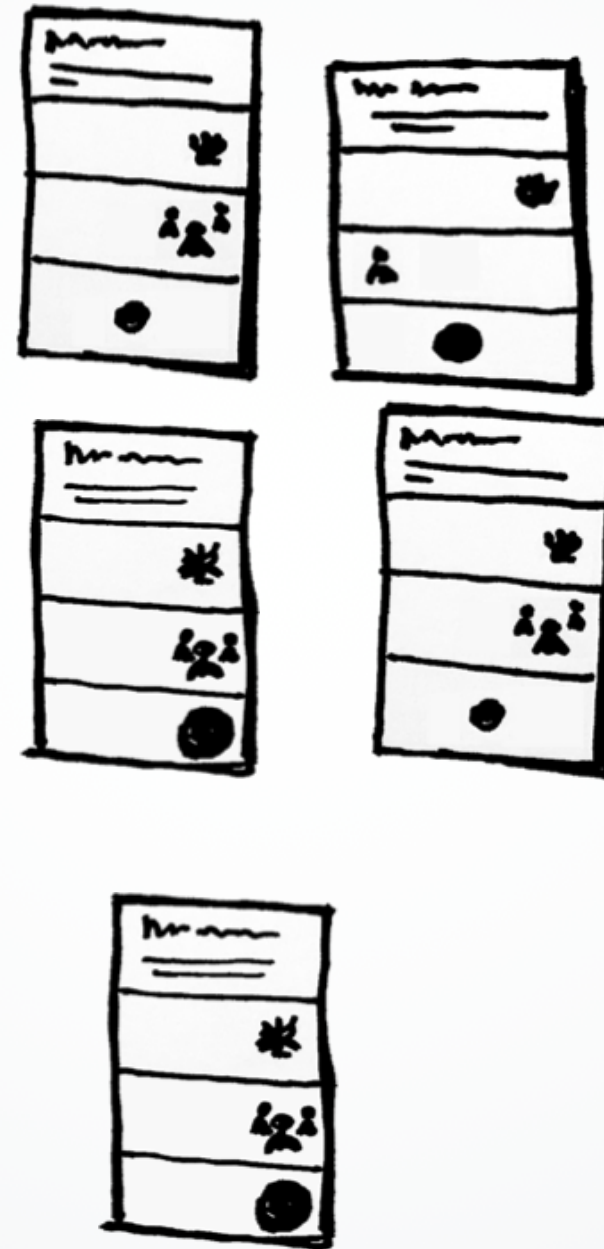
Someday



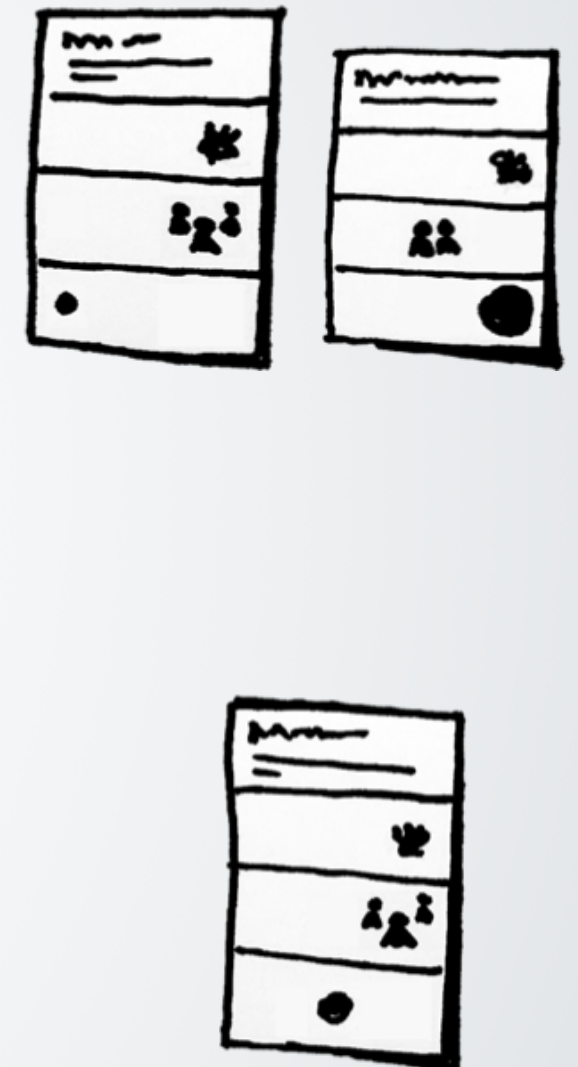
Now (high priority / MDP)



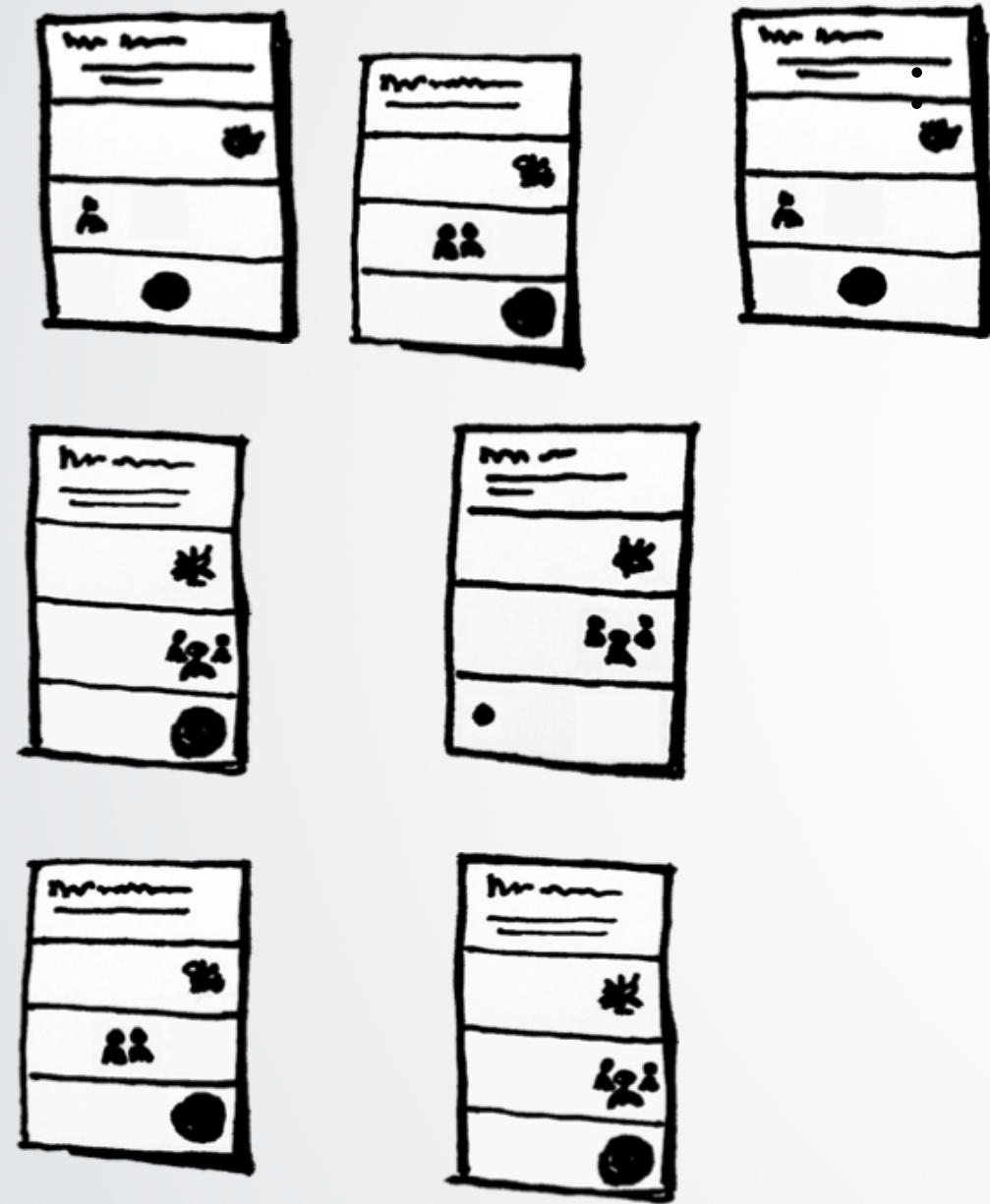
Next (next priority / evolve MDP)



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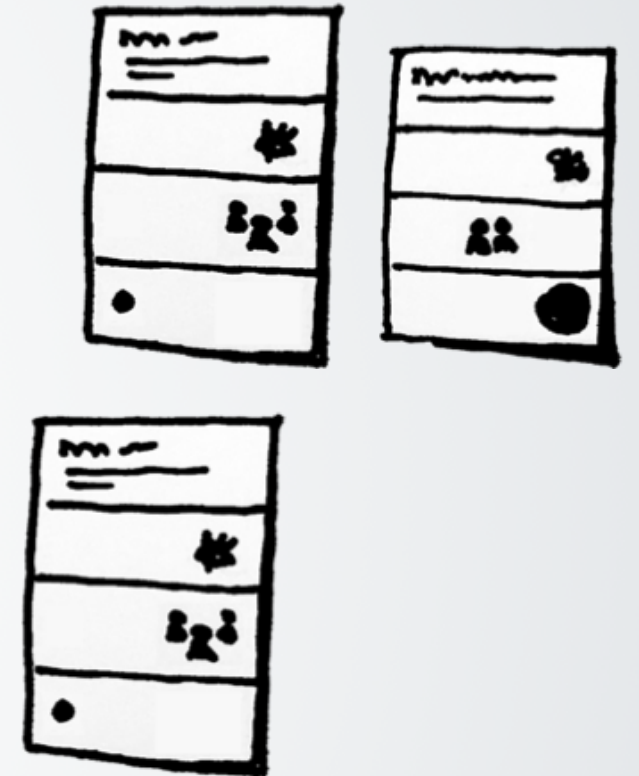
Now (high priority / MDP)



Next (next priority / evolve MDP)



Someday



Phase 2: Connecting to our systems wherever, whenever

Improve employee and clients ability to connect to content, tools, files, and people from wherever they are.

PHASE TWO		CONNECTING TO OUR SYSTEMS AND CONTENT		PHASE THREE	
WORKING ANYWHERE with POOR connectivity		WORKING ANYWHERE with GOOD connectivity		REVIEWS and MARK-UPS	
...WITH POOR CONNECTIVITY. Having the best possible work experience in an environment where typical internet and Wi-Fi infrastructure doesn't exist.		...ON MS OFFICE DOCS. Having a typical document work experience with documents (ex. Word, Excel, PowerPoint, etc.) from any device, anywhere. This includes the ability to read, create, edit and comment.		Having the ability to do digital reviews and mark ups from anywhere on any device.	
REMOTE CLIENT PRESENTATIONS		SHARING content with CLIENTS		SHARING content with CLIENTS	
Employees get a one pager from IT or their team lead that informs them about working in conditions with poor connectivity at a time that makes sense to receive that information.		Urbanites have a similar experience outside of the office as they would in the office. This includes a mobile access experience on their phones or tablets that allow them read/write/create/ comment capabilities for Office documents.		Employees can log into CAD servers via Citrix putting them "closer" to the content when they are working remotely.	
An infographic placed in each kitchen that explains working in places with poor connectivity helps raise awareness about the constraints.		Employees see infographics in their offices and support information on Pulse.		Employees have several opportunities and channels through which to get up to speed on how to use Citrix.	
Information on Pulse is as a reference for employees and team leads for self service interactions.		Awareness is the main hurdle. Training in groups or one on one could be part of the adoption strategy where it is deemed that extra support is required.		Teams are given guidance on where to best keep CAD files for the most optimal sharing and access experience.	
Requires clear and common understanding across the organization of what system to use and when. Can support and enable certain kinds of work that include Microsoft products.					
Create a one-pager or infographic that helps employees understand what they can expect and what they should do to have the best experience possible before they get to a remote field location.		Create a one-pager or infographic that helps employees understand all the things that need to be in place for a great work from home experience.		Encourage stakeholders to create a consistent process for managing CAD native files and published PDFs.	
		Evaluate SharePoint online.		Investigate tools for remote collaboration on CAD files.	
Create a one-pager or infographic that helps employees understand all the things that need to be in place for a great WebEx experience.		Help teams trial WebEx sessions ahead of time with a pre-written email appointment that they can send to clients.		Evaluate extranet options that meet the security profile. For example, separate network (DMZ) or separate web app with a gateway appliance.	
Initiate discovery research to gather insight into the specific needs for external sharing with clients at .		Map the client's journey and identify pain points.			

Phase 3: Internal Systems

Elevate our preboarding and onboarding of new employees, invoicing, leveraging our data, new technology and our employee files.

PHASE THREE		INTERNAL PROCESSES		BACKLOG	
content with CLIENTS	PREBOARDING and ONBOARDING	REVIEWING draft INVOICES	ANALYZING and summarizing DATA	Finding NEW TECH	Keeping CAREER and salary INFORMATION
<p>se place to keep content that share with clients.</p>	<p>Creating an exceptional employee onboarding experience for everyone.</p>	<p>Creating a draft invoice review process that creates less friction and duplication of effort.</p>	<p>Creating a more useful output from Deltek so that the reporting experience is smoother.</p>	<p>Creating an exceptional experience for employees that find a new app or device that can help them be productive.</p>	<p>Storing career and salary information in a repository that can be privately shared by the coaches and their mentees.</p>
<p>ess and instructions on how to use the site. The site documents before sharing.</p> <p>site templates and their use.</p> <p>enhancements such as additional libraries.</p>	<p>There are many touchpoints to consider in a pre-boarding and on-boarding journey. Journey mapping and service blueprinting are good ways to define an optimal experience. Some questions to consider:</p> <p>How much new information is presented and through which channels?</p> <p>What exactly does a new person need to know at which point along the way in order to feel as confident and productive as possible?</p> <p>How do we best support the hiring manager, who is already busy, in providing a good onboarding experience to the new employees?</p>	<p>Draft invoices could be opened on a tablet and marked up as you would on paper, capturing all the comments digitally.</p>	<p>This journey is mostly about individual knowledge work by an expert. Most touchpoints will be between the expert, the Deltek application and supporting applications such as Excel. Some initial training will likely be needed.</p>	<p>A place or social channel to communicate out to colleagues and IT about a potentially useful piece of new technology.</p> <p>Interactions with IT that are curious, informative, and helpful rather than skeptical and protective.</p> <p>A well understood process for folding new technology into the technology landscape.</p>	<p>Coaches and managers are trained where to get, keep, and update salary information.</p> <p>Best practice information is kept on Pulse where managers can use it as a refresher or quick reference.</p> <p>Managers see the up to date information in the same known place, regardless of team or branch.</p>
					<p>Booking VACATION</p> <p>Ability for an employees to o vacation days they have an vacation time.</p>

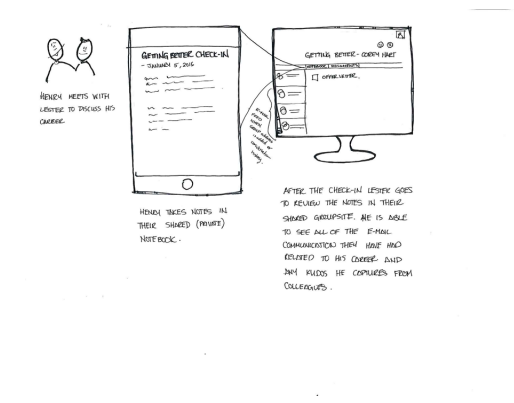
Future: Backlog of opportunities

Continue to evolve our technology, processes and approach.

BACKLOG

Keeping **CAREER** and salary **INFORMATION**

Storing career and salary information in a repository that can be privately shared by the coaches and their mentees.



Coaches and managers are trained where to get, keep, and update salary information.

Best practice information is kept on Pulse where managers can use it as a refresher or quick reference.

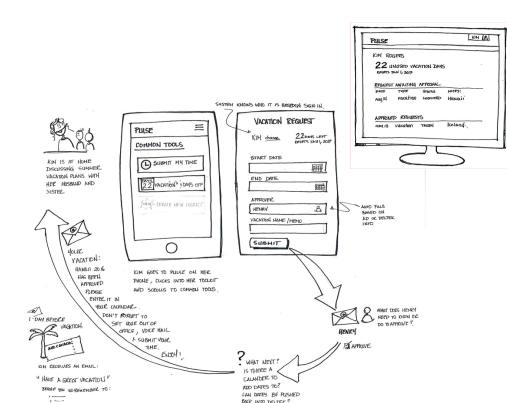
Managers see the up to date information in the same known place, regardless of team or branch.

Map the current state process that coaches go through to maintain this information.

Consider alternatives for secure repositories to store this information (ex. SharePoint sites, OneNote, Outlook Groups)

Booking **VACATION TIME**

Ability for an employees to see how many unused vacation days they have and to submit a request for vacation time.



Employees go to a place on Pulse that shows them how much vacation they have left and walks them through the process for booking time off.

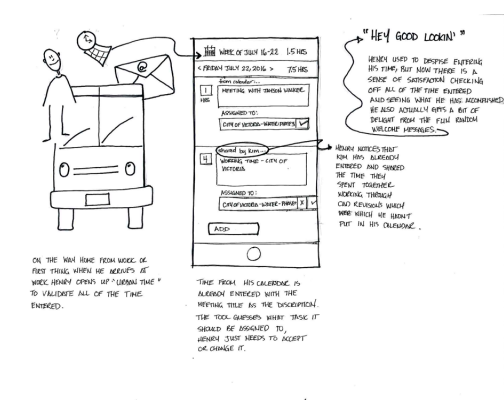
Approvers get an email that alerts them to a vacation request and shows the dates and time available to the employee.

Employees get an email confirming the request.

Communication to branch leads and coaches and all employees about how the new process works. Information on Pulse that people can find on their own.

Entering **TIME**

Improve the experience of entering time to promote better timesheet hygiene.

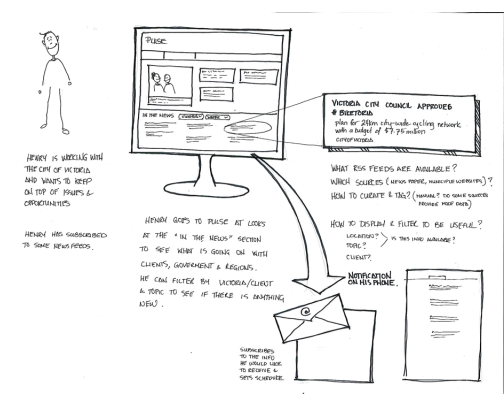


Touchpoints depend on the solution developed. The sketch depicts alerts to validate the time already known through systems such as the Outlook calendar.

Communication to branch leads and coaches and all employees about how the new process works. Information on Pulse that people can find on their own.

RESEARCH and INFO gathering

Staying informed of what is happening in our industry and our client's industries and business.



Employees could create Outlook Groups to share common intelligence around a particular topic, practice or client type. Yammer group could do the same.

RSS feeds that were crafted to specific topic areas could be consumed through organized pages and feeds on Pulse.

Any new feeds would be communicated out through multiple communication channels, email, Pulse, print, word of mouth.

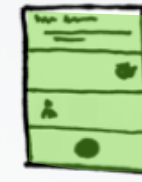
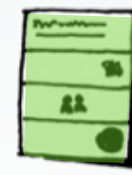
Additional experience backlog items

- project inspection
- expenditure request approval
- contract forms approval
- Collaborate visually
- Social media plan
- Virtual reality
- Hazard Assessment
- Wi-Fi connectivity
- Hardware replacement
- Sketches into infographics

Determine the best location on Pulse and other channels that could be useful for employees to receive this information.

With all the business problems prioritized and organized we can zoom in and focus on what's most important.

THE BIG IDEAS



me. how
we want
not as

me
we want
not as

me
we want
not as

me
we want
not as

me
we want
not as

"I know what is
going on this week,
next week and beyond
I feel involved and
informed"

VALUE TO THE
EMPLOYEE

VALUE TO THE
BUSINESS



REQUIREMENTS
FOR SUCCESS

"What else needs
to happen to
make this
successful?"







Opportunity

Value to the Employee

Value to the Business

Success Metrics

Content Revisions and Evolution

Key Communication Activities

People and Process

Change Appetite

Training

Key Adoption Considerations

habanero PHASE ONE NEW FOUNDATION					
Feature	Surface KEY COMMUNICATION (news and events) in a centralized shared location	Create a TASK BASED information architecture to help people find the information they need	Improve the SEARCH EXPERIENCE and create PROMOTED RESULTS	Provide TOOLS AND RESOURCES library	
PLATE	Create a central repository for key communications. Leveraging topic tags will allow news filtering and support better findability, providing employees with the ability to more easily uncover what is important to them.	Organize information based on users tasks rather than by who created or owns the information. Utilize metadata and tags to organize and surface information based on their day-to-day tasks.	Introduction of search refiners to help employees scope and refine their search to more quickly get to the information they need. Use search feedback and analytics information to create promoted results for frequently searched items (based on search logs), as well as pages frequently visited.	Compile all work tools into one area, leveraging refiners to surface different types of content and topics in multiple ways. The tools and resources area provides a centralized location intended to contain all the documents and pages your organization needs to access on a daily basis.	
Themes	PUBLISHING	FINDABILITY	FINDABILITY	TOOLS	
Value to Employee	"I know what is going on today, this week, this month, this year."	"I can easily find what I am looking for. I can focus on important things, explore the task that I care to do."	"I have stopped bookending everything on the Intranet because if it's there I know I can find it with search."	"I can filter and refine to find the different forms, policies and templates I am looking for based on different topics."	
Alignment with Principles	types of news in one place, and find items I've seen in the past. If I am looking for important messages, I know where to find them."	recent version of a file and don't have to ask anyone where it is."	"I've learned that instead of phoning someone to find something - which is inconvenient for me and them - I look for it on the intranet first."		
Value to Business	"Our colleagues are able to make decisions faster."	"Our HR staff are interrupted less from other work because the intranet allows for more self-serve HR information."	"I just tell people they can find it on the intranet, and they do."	"Employees are easily able to locate business critical information, there is a single source of truth."	
Key metrics	Increased page views of news articles and descriptions. Increased use of email, leveraging links to the intranet.	Usability testing indicates new design and structure meets employee's needs.	Number of searches conducted per month on the intranet increases. Staff report an improved search experience.	Reduction in employees storing documents on their local drives.	
Content revisions and evolution	Identify content currently shared via e-mail that should now be shared on the intranet.	Complete content audit (includes evaluation and identification of content to be archived, deleted, or moved).	Identify content to be archived (to help clean up search results).	Re-label document names to be more friendly and descriptive.	
Key communication	Create a launch strategy with key messages and a timeline.	Communicate strategy to key stakeholders.	Encourage employees to provide search feedback (be sure to respond - so that it doesn't go into the abyss) and follow up with users when you have made a change based on their feedback.	Communicate widely the change in where forms and policies will be stored and the improved ability to filter and refine based on topic and type. Get people excited for the change.	
People and Processes	Designpoint an owner (a "Intranet Name" manager is recommended) for the maintenance of the information architecture (IA).	Appoint an owner (a "Intranet Name" manager is recommended) for the maintenance of the information architecture (IA).	Configure search analytics and monitor weekly as an input for content, IA, or design improvements.	Appoint an owner to manage the library and content types (metadata lists), and help authors with tagging documents appropriately.	
Change Appetite	Establish regular rhythms for the "Intranet Name" manager and content steering committee to meet.	Establish regular rhythms for the "Intranet Name" manager and content steering committee to meet.	Someone to respond to and act on search feedback.	Someone to test performance of search terms and create best bets based on feedback and analytics.	
Training	Content steering training. Content types training. Brand training (guidance on visual styles and voice).	Content and community managers to understand new organizational structure and rational.	Analytics training for "Intranet Name" manager, editor, or delegate.	Train a manager or author about tagging and meta data best practices.	
Key Adoption Considerations	Develop a strategy for changing communicators current process of sending out an email. What content is best shared via email, and what is best shared via intranet.	Develop a timeline for decommissioning the old "Intranet Name" site. Do not allow revisions or new content to be added to the old site.	High-value promoted results are created.	Provide a way for employee to give feedback on the way documents are tagged and refined.	

habanero PHASE TWO (THEMATIC NAME FOR PHASE TWO)					
NAME OF FEATURE:	NAME OF FEATURE:	NAME OF FEATURE:	NAME OF FEATURE:	NAME OF FEATURE:	
DESCRIBE THE FEATURE (E.G. CHARACTERISTICS, BEHAVIORS)	DESCRIBE THE FEATURE (E.G. CHARACTERISTICS, BEHAVIORS)	DESCRIBE THE FEATURE (E.G. CHARACTERISTICS, BEHAVIORS)	DESCRIBE THE FEATURE (E.G. CHARACTERISTICS, BEHAVIORS)	DESCRIBE THE FEATURE (E.G. CHARACTERISTICS, BEHAVIORS)	
INSERT A QUOTE OR TWO OF WHAT AN EMPLOYEE MIGHT SAY WHEN YOU ARE SUCCESSFUL	INSERT A QUOTE OR TWO OF WHAT AN EMPLOYEE MIGHT SAY WHEN YOU ARE SUCCESSFUL	INSERT A QUOTE OR TWO OF WHAT AN EMPLOYEE MIGHT SAY WHEN YOU ARE SUCCESSFUL	INSERT A QUOTE OR TWO OF WHAT AN EMPLOYEE MIGHT SAY WHEN YOU ARE SUCCESSFUL	INSERT A QUOTE OR TWO OF WHAT AN EMPLOYEE MIGHT SAY WHEN YOU ARE SUCCESSFUL	
INSERT A QUOTE OR TWO OF WHAT A BUSINESS OWNER MIGHT SAY WHEN YOU ARE SUCCESSFUL	INSERT A QUOTE OR TWO OF WHAT A BUSINESS OWNER MIGHT SAY WHEN YOU ARE SUCCESSFUL	INSERT A QUOTE OR TWO OF WHAT A BUSINESS OWNER MIGHT SAY WHEN YOU ARE SUCCESSFUL	INSERT A QUOTE OR TWO OF WHAT A BUSINESS OWNER MIGHT SAY WHEN YOU ARE SUCCESSFUL	INSERT A QUOTE OR TWO OF WHAT A BUSINESS OWNER MIGHT SAY WHEN YOU ARE SUCCESSFUL	
WHAT NEEDS TO BE MEASURED TO PROVE OR INDICATE THE FEATURE IS SUCCESSFUL?	WHAT NEEDS TO BE MEASURED TO PROVE OR INDICATE THE FEATURE IS SUCCESSFUL?	WHAT NEEDS TO BE MEASURED TO PROVE OR INDICATE THE FEATURE IS SUCCESSFUL?	WHAT NEEDS TO BE MEASURED TO PROVE OR INDICATE THE FEATURE IS SUCCESSFUL?	WHAT NEEDS TO BE MEASURED TO PROVE OR INDICATE THE FEATURE IS SUCCESSFUL?	
WHAT HAS TO HAPPEN WITH CONTENT TO MAKE THIS SUCCESSFUL? (E.G. AUDIT, CLEANUP, AGGREGATION, REWRITING, TAGGING)	WHAT HAS TO HAPPEN WITH CONTENT TO MAKE THIS SUCCESSFUL? (E.G. AUDIT, CLEANUP, AGGREGATION, REWRITING, TAGGING)	WHAT HAS TO HAPPEN WITH CONTENT TO MAKE THIS SUCCESSFUL? (E.G. AUDIT, CLEANUP, AGGREGATION, REWRITING, TAGGING)	WHAT HAS TO HAPPEN WITH CONTENT TO MAKE THIS SUCCESSFUL? (E.G. AUDIT, CLEANUP, AGGREGATION, REWRITING, TAGGING)	WHAT HAS TO HAPPEN WITH CONTENT TO MAKE THIS SUCCESSFUL? (E.G. AUDIT, CLEANUP, AGGREGATION, REWRITING, TAGGING)	
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WHAT PEOPLE AND PROCESSES NEED TO BE IN PLACE TO MAKE THIS SUCCESSFUL?	WHAT PEOPLE AND PROCESSES NEED TO BE IN PLACE TO MAKE THIS SUCCESSFUL?	WHAT PEOPLE AND PROCESSES NEED TO BE IN PLACE TO MAKE THIS SUCCESSFUL?	WHAT PEOPLE AND PROCESSES NEED TO BE IN PLACE TO MAKE THIS SUCCESSFUL?	WHAT PEOPLE AND PROCESSES NEED TO BE IN PLACE TO MAKE THIS SUCCESSFUL?	
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ARE THERE ANY OTHER CHANGE MANAGEMENT ACTIVITIES THAT ARE IMPORTANT TO SUCCESS? (E.G. DECOMMISSIONING OLD METHOD, STORYTELLING)	ARE THERE ANY OTHER CHANGE MANAGEMENT ACTIVITIES THAT ARE IMPORTANT TO SUCCESS? (E.G. DECOMMISSIONING OLD METHOD, STORYTELLING)	ARE THERE ANY OTHER CHANGE MANAGEMENT ACTIVITIES THAT ARE IMPORTANT TO SUCCESS? (E.G. DECOMMISSIONING OLD METHOD, STORYTELLING)	ARE THERE ANY OTHER CHANGE MANAGEMENT ACTIVITIES THAT ARE IMPORTANT TO SUCCESS? (E.G. DECOMMISSIONING OLD METHOD, STORYTELLING)	ARE THERE ANY OTHER CHANGE MANAGEMENT ACTIVITIES THAT ARE IMPORTANT TO SUCCESS? (E.G. DECOMMISSIONING OLD METHOD, STORYTELLING)	

Movement Road Map

[illegible]

Improvement Road Map

PHASE ONE

FINDING INFORMATION

Journey

Description

Leveraging **PAST WORK**

Easily find examples of past work to showcase what we have done or as a starting point for current work. This way, we can focus on what will bring the most value to clients and their communities.

Finding **TEMPLATES** and **IMAGES**

Easily find basic brand templates including: letterheads, word documents, PowerPoint templates, etc. Finding document templates such as statements of work, design standards, reports, offer letters, etc.

Finding an **EXPERT** at **URBAN**

Finding Urbanites based on skill, expertise, and past project work.

INITIATING A PROJECT

Simplify project set up to ensure relevant tools have been made readily available and the Technology team has insight into any client needs.

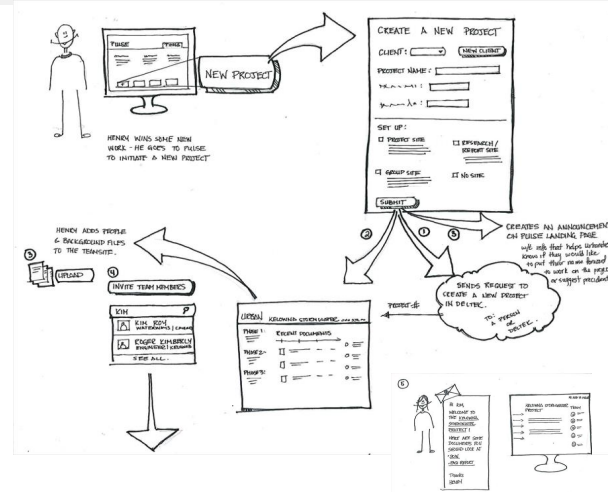
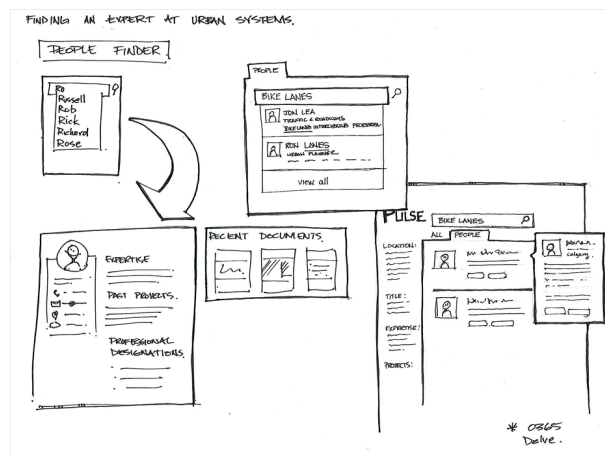
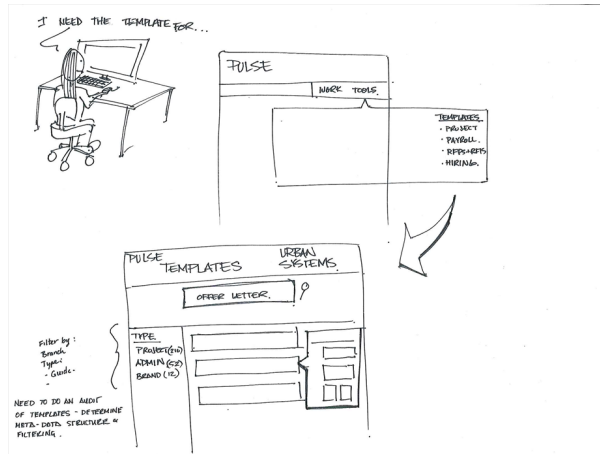
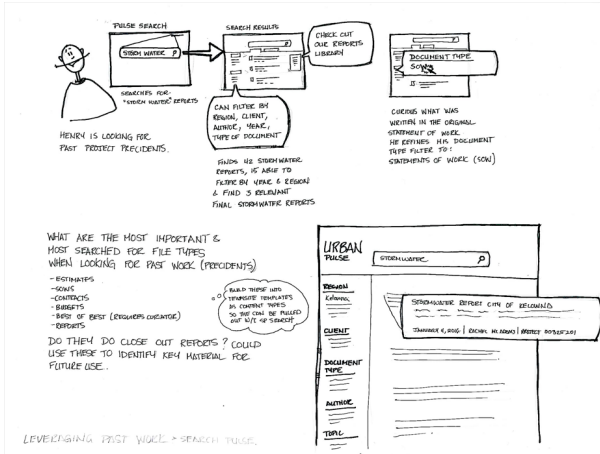
CONNECTION

WORKFLOW

...WITH **POOR** CONNECTIONS. Possible work experience typical internet and

Opportunity Sketches

(preliminary solutions sketches - each area will require further investigation)



Experience touchpoints and actions

(Interactions, communications, training, adoption supports, change management)

Urbanites visit a really effective search experience that quickly connects Urbanites to the information they are trying to find.

When kicking off a new project, Urbanites always create a new teamsite leveraging one of the project templates on the self service site creation page (all barriers or potential opt-out opportunities have been removed).

Tech team supports and enables the project team with training and support where needed.

Orientation material such as introductory emails, and a video walkthrough are templated.

Tech team leads project coordinator champion network.

A dedicated and managed place on Pulse for marketing and brand material with links to related templates.

Consider a tools and templates section, and the ability for individual Urbanites to bookmark favorite tools or pages (curate their own list).

Communicate when new templates are available and who to contact for template updates or to add new templates.

Easy to locate people search interface on Pulse.

Campaign to encourage people to add content to their profiles.

Create place on Pulse to initiate a new project.

Communication strategy to help Urbanites understand the value of the teamsite template for managing their current project as well as for helping them find project information in the future.

Clear communication about what to use and when. (e.g.. Where to store and work on CAD files)

Section on Pulse to store information about the different types of site templates and which to use when.

Invitation to project team when project is kicked off, including links to any relevant documents.

Employees get a one pager from working in conditions with poor that information.

An infographic placed in each connectivity helps raise aware

Information on Pulse as a reference interactions.

Potential first steps

Investigate current metadata that can be pulled from file share and leveraged as a search scope.

Identify important and frequently sourced document types.

Create templates for teams that integrate content types and metadata related to the most frequently sourced document types.

Audit current brand templates.

Source best of breed content templates.

Find someone to care for and curate this list.

Start with a small pilot group and leverage available technology and functionality to minimize customization. Consider Delve, Mysites or a combination of both.

Encourage Urbanites to use team sites.

Showcase the value of team sites and ease barrier to entry by integrating it into the project initiation process.

Create a one-pager or infographic expect and what they should get to a remote field location.

Value to Employee

"I can find past examples of our work to showcase and win new work."

"I can find examples of our past work to help leap us forward when starting new work, allowing our team to focus our efforts and attention on things that will bring the biggest value to our clients."

"I know where to go to find the most up-to-date template and have confidence that it is the best place to start."

"I don't have to have a network or rely heavily on my senior colleagues' network to find experts in our organization that I can reach out to."

"I can search for people based on their role and skill."

"I have a place to start uploading documents that will help the team get started"

"I'm more confident because be when I'm in a poor connect

"I feel reassured that I've prep circumstances."

"I feel like I no longer need to the client and being productiv

Audience size





















Change aptitude



Business Impact



		<p>Tech team supports and enables the project team with training and support where needed.</p> <p>Orientation material such as introductory emails, and a video walkthrough are templated.</p> <p>Tech team leads project coordinator champion network.</p>	updates or to add new templates.	on CAD files)	<p>Section on Pulse to store information about the different types of site templates and which to use when.</p> <p>Invitation to project team when project is kicked off, including links to any relevant documents.</p>	information on Pulse as a record of interactions.
	Potential first steps	<p>Investigate current metadata that can be pulled from file share and leveraged as a search scope.</p> <p>Identify important and frequently sourced document types.</p> <p>Create templates for teams that integrate content types and metadata related to the most frequently sourced document types.</p>	<p>Audit current brand templates.</p> <p>Source best of breed content templates.</p> <p>Find someone to care for and curate this list.</p>	Start with a small pilot group and leverage available technology and functionality to minimize customization. Consider Delve, Mysites or a combination of both.	<p>Encourage Urbanites to use team sites.</p> <p>Showcase the value of team sites and ease barrier to entry by integrating it into the project initiation process.</p>	Create a one-pager or infographic to explain the feature and what they should expect and what they should do to get to a remote field location.
VALUE GENERATION	Value to Employee	<p>"I can find past examples of our work to showcase and win new work."</p> <p>"I can find examples of our past work to help leap us forward when starting new work, allowing our team to focus our efforts and attention on things that will bring the biggest value to our clients."</p>	"I know where to go to find the most up-to-date template and have confidence that it is the best place to start."	<p>"I don't have to have a network or rely heavily on my senior colleagues' network to find experts in our organization that I can reach out to."</p> <p>"I can search for people based on their role and skill."</p>	"I have a place to start uploading documents that will help the team get started"	<p>"I'm more confident because I know where to go to find the best of breed content and when I'm in a poor connection I can find examples of our past work to help leap us forward when starting new work."</p> <p>"I feel reassured that I've prepared myself for the worst case circumstances. "</p> <p>"I feel like I no longer need to rely on my senior colleagues' network to find experts in our organization that I can reach out to and being productive for the client and being productive for the client and being productive for the client."</p>
	Audience size					
	Change aptitude					
	Business Impact					
INVESTMENT	Effort (Time and effort for the Urban Systems technology team)					
	Cost (Hiring external expertise or technology cost)	\$\$\$	\$	\$\$	\$	
SUCCESS METRICS	Key metrics (How will we know we are successful?)	<p>Findability survey - set a baseline and measure against it post improvement.</p> <p>Start tracking search stats (most searched, abandoned searches etc.)</p> <p>Track the number of additions to the project "exemplars" library.</p>	<p>Findability survey - set a baseline and measure against it post improvement.</p> <p>Start tracking search stats (most searched, abandoned searches etc.)</p> <p>Create 'Best-bets' based on commonly searched terms.</p> <p>Track 'Best-bets' to see how often they are used.</p>	<p>Set up analytics to start tracking search stats (most searched, abandoned searches etc.)</p>	Track the number of sites that are created and use frequency.	<p>Measure hits on the portal page.</p> <p>Measure the number and frequency of site visits under different conditions with poor connectivity.</p>
	People and roles (Which people and processes need to be in place to make this feature successful?)	<ul style="list-style-type: none"> • Curator of best work • Project Leads • Project Co-coordinators • Project Teams 	<ul style="list-style-type: none"> • Curator of marketing and brand material • Curator of templates 	<ul style="list-style-type: none"> • Urbanites to update their own profile 	<ul style="list-style-type: none"> • Project coordinators • Project lead • Project team • BAMs • IT 	<ul style="list-style-type: none"> • Project coordinators • Project lead • BAMs • IT • Infographic designer
	Processes	<p>Requires regular rhythm of investigating search analytics for most searched terms, abandoned searches to help tune and improve search.</p> <p>Proper categorization of content including:</p> <ul style="list-style-type: none"> • Creation and use of managed and inherited metadata; • Urbanites putting content in the right place 	<p>Requires regular rhythms for a SME/curator group to evaluate, update and upload new templates or best of breed examples.</p> <p>Submission process and criteria for a brand photo library.</p>	Process for creating a new employee profile and encouraging them to add to it as part of onboarding and how a former employee profile is removed.	<p>Workflow for creating a new site.</p> <p>Workflow for decommissioning or archive an old site.</p>	Sharing information at project kick-off.
	Information and data considerations	<p>Urban wide taxonomy (created by/with SMEs)</p> <p>Project templates and clear explanation of their use</p>	<p>Image quality requirements.</p> <p>Quality control and verification of content before publishing.</p>	Review Active Directory and profile photo database.		A tech expert will need to write the code to integrate the feature into the portal. A graphic designer will need to create the infographic.

SUCCESS METRICS	Why it matters	How will we know we are successful?	How will we know we are successful?	How will we know we are successful?	How will we know we are successful?	How will we know we are successful?
	Why it matters	How will we know we are successful?	How will we know we are successful?	How will we know we are successful?	How will we know we are successful?	How will we know we are successful?
POTENTIAL TECH	Technology (What technology could support this journey?)					
	Office 365 (Microsoft Cloud) Delve Office (Word, PPT, Excel etc.) Groups Team sites Yammer Go (intranet platform)	Delve *		Delve *		
	SharePoint Extranet (on prem.) SharePoint search Extranet project sites	SharePoint search ***- promoted results and refiners Extranet project sites			Search driven site directory Self serve site creation for projects	
	SharePoint intranet (on prem.) Mysites "Pulse" intranet SharePoint search		Pulse SharePoint search	Mysites***		
	Workflow tools (e.g.. Nintex) Mark-up tools (e.g.. Bluebeam) Analytics tools (e.g.. Google analytics) Slack? Citrix Tech notes				Site provisioning workflow	
SUCCESS METRICS	People and roles (Which people and processes need to be in place to make this feature successful?)	• Curator of best work • Project Leads • Project Co-coordinators • Project Teams	• Curator of marketing and brand material • Curator of templates	• Urbanites to update their own profile	• Project coordinators • Project lead • Project team • BAMs • IT	• Project coordinators • Project lead • BAMs • IT • Infographic designer
	Processes	Requires regular rhythm of investigating search analytics for most searched terms, abandoned searches to help tune and improve search. Proper categorization of content including: • Creation and use of managed and inherited metadata; • Urbanites putting content in the right place	Requires regular rhythms for a SME/curator group to evaluate, update and upload new templates or best of breed examples. Submission process and criteria for a brand photo library.	Process for creating a new employee profile and encouraging them to add to it as part of onboarding and how a former employee profile is removed.	Workflow for creating a new site. Workflow for decommissioning or archive an old site.	Sharing information at project
	Information and data considerations	Urban wide taxonomy (created by/with SMEs) Project templates and clear explanation of their use	Image quality requirements. Consider naming conventions for templates and associated taxonomy.	Review Active Directory and profile photo database.		A tech expert will need to write them to the portal. A graphic infographic.
	Best practices or rules	All client projects should be run in a project site so that it can be indexed and searched later (remove any perceived friction or barriers to entry such as internal fee/cost to project). *CAD native files will be kept in file share.		Best practices for selecting a profile photo.	Best practice about what site template to use and where. Best practice about where project work should happen and why.	



*The roadmap and vision work was a **revelation**. This change requires a program approach between culture, technology, and communications.*

CEO



Discussion

habanero