# Volume 1: Intranet Content Strategy, Presentation, and Governance

## Intranet Usability Guidelines

4th Edition

*Anna Kaley and Maria Rosala*

Nielsen Norman Group

8 The Green, Suite #14572, Dover, DE 19901 USA

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**Report Authors:** Anna Kaley and Maria Rosala

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# Executive Summary

## FOCUS ON VALUE

Employees visit an intranet to access fresh content and learn about what's happening at the organization. They go there to collaborate and engage with their peers around content, to understand benefits, policies, and procedural content, and to use content to solve problems. Simply put, great intranet content has the power to help employees feel more connected to their peers and organization. This connection leads to a better employee experience and, ultimately, a better customer experience.

Successful intranet content helps organizations achieve some or all of these goals:

- Communicate where the organization is going in the future
- Inform and create awareness about what's *currently* happening, internally and externally, that impacts the organization
- Provide resources and tools purposefully organized for and by departments and teams
- Foster familiarity and collaboration among teams, peers, and leaders
- Support inclusive employee and organizational wellbeing

When it comes to intranet content, it's important to staff the corporate communications function, but it's equally important to decentralize how *some* of the content is created. Features that let employees post content themselves or at least suggest story ideas, help generate unique and engaging ideas. It's usually difficult for one team to create and manage all intranet content, and even more difficult if localization and translation are needed.

Some teams have a core communications function responsible for corporate content and various content creators around the organization — on different teams, offices, and countries — whose responsibilities include writing, editing, approving, and posting content. Otherwise, their job includes recruiting others to do so. They also oversee the final product.

The content management system the intranet sits on is only a small part of the equation. Having content processes and assignments in place are just as, if not more important, as the technology itself. Assigning content responsibilities is most effective when the assignments are ongoing, not just a launch task, and regular content contribution is part of people's job descriptions with measurable goals and objectives. There should be a team available to help contributors with feedback and guidance. That might be the intranet team itself, or a contributors' community.

## The Intranet as a Change Management Tool: Lessons from COVID-19

During the COVID-19 pandemic, more than ever, many intranets became employees' main point of connection to their organizations and colleagues. While tailoring content specifically for employees should always be a primary focus, having to accelerate the speed at which content was created shed light on the importance of crafting content with employees' needs and emotional states in mind. The intranet suddenly became a critical tool for supporting rapid change management, as people were working under conditions that were:

- Different from their previous work environments, processes, tools, and team collaboration methods
- Often suboptimal compared to what they had prior
- Distressing because an abundance of abrupt change, frustration, fear of the unknown, illness, grief, or a myriad of other factors

As such, the following intranet content types were of particular demand:

1. **Health and benefits:** helping employees get fundamental, tactile information about being and staying healthy, both physically and mentally
2. **Virtual-work help:** giving employees easy access to the tools and information they need to work from home
3. **Work-process changes and guidance:** providing processes, information, and tools for how to work in the organizations' recommended way, serving customers and external audiences. Not all employees and customers are tech-savvy, so educating users about telecommuting was helpful. Other topics included managing and leading through tough times, interacting with people in-person, public relations, and safety requirements.
4. **Connection and engagement opportunities:** fostering the organization's culture and values, and supporting connection among coworkers

The actual material offered and how it was prioritized depended greatly based on:

- The organization's culture
- Employees' potential exposure to the virus
- Exposure at the organizations' location(s)
- The time and resources available to the intranet team

## Create Content that Communicates and Connects

Pandemic or not, it's important to make employees feel valued and allow them to connect with the organization and their coworkers through the intranet's content. Content about peers and what the organization is doing for employees, customers, or the world can drastically boost morale and motivation. News and grounding messages that reflect the organization's culture and values can also go a long way toward creating connection.

Content creation and management often span multiple teams (UX, content creation, emergency operations, employee communications, etc.) and is usually better as a result. One organization we studied created a UX framework to help the internal UX team and the multiple communication task forces across the organization better understand what users might need throughout the year, depending on their tenure at the organization. Identifying user groups and understanding how each group might interpret content was key to this organization's ability to create content that worked for its intranet.

One content creator described how having a solid sense of ownership, content strategy, and processes are the keys to successful intranet content. They said, "There are a lot of approvals now, so we do not have conflicting information going out from different areas. All communications (regardless of the source) run through a central process before being posted." This directly influences how content is structured, presented, and maintained on the intranet.

## Focus on Content Quality Over Quantity

Many of the intranets we studied had far *too much* content for one reason or another. Some content was outdated, while other content was simply posted on the intranet because someone thought it might be cool to have, and there was nowhere else to put it. Navigation menus and search engine results pages were riddled with meaningless links, and the pages themselves were overstuffed with text and banners that looked like ads. As a result, employees struggled to find any useful content on the intranet. Employees don't want endless options; they want the content they need, when and where they need it.

For example, at Dell, one intranet team member said, "On our intranet, we have over a million documents and 40,000 individual sites on our Jive Community. It's impossible to govern all of that, and where we see it manifesting negatively is in the search."

In our most recent round of research, we didn't see organizations struggling to achieve an appropriate *quantity* of content as much as we noticed a struggle to maintain the *quality* of the intranet's content. If employees can freely contribute content to the intranet in any way, an organization should be more concerned with maintaining quality than worrying about whether an ample quantity will be reached.

You might also worry that employees will post inappropriate content when given free rein to contribute. That is a legitimate concern but doesn't usually happen in practice. Most people have no interest in doing this, and even if they do, the social implications of having their names attached to the content typically prevent them from acting on the desire.

Less is more when it comes to intranet content. Less content is much easier for resource-strapped teams to manage than a bunch of useless, "just-in-case" content. Focus on value and provide only the content needed for your employees and your organization instead of posting *everything* on the intranet. Also, by posting less, but focusing more on each piece of content's value, you'll have less content to manage over time.

## OUR RESEARCH STUDIES

Findings in this and other reports in this series are based on four large behavioral research studies. These were planned, conducted, and funded by Nielsen Norman Group. The research included the following:

- **Fifty-seven intranets**, with 18 years between the first study and the most recent. We studied:
  - 14 intranets in 2002
  - 13 intranets in 2005
  - 15 intranets in 2011
  - 15 intranets in 2019
- **More than 285 employees** (75 in our most recent round of research). They were all employees of each organization and users of the intranet.
- **Three continents:** North America (the United States and Canada), Europe, and Asia

We conducted these studies to learn about the following:

- How employees use intranets
- What makes intranets helpful or unhelpful
- What can be done to make intranets better

## METHODOLOGY

We used three basic usability methods for each round of research:

- **Usability testing** in a lab or conference room setting, with one or a few researchers watching users for 75–120 minutes as they attempted anywhere from nine to 15 realistic tasks on the intranet
- **Field studies** during which a researcher watched employees work for anywhere from one to five hours to see how and when they used the intranet in their personal work areas
- **Expert reviews** during which researchers used the design considering users, top tasks, and established design principles

## ABOUT THE FOURTH EDITION

Our most recent round of intranet research followed the same study protocol as in previous rounds and involved more than **75 employees at 15 different organizations.** We usually observed **four to eight employees at each study location,** which ranged from small companies to large enterprises across the United States, Canada, and Europe.

An NN/g researcher conducted one-hour field study sessions, observing participants in their work environment as they went about their normal work. One or two NN/g researchers conducted usability testing sessions, using either company computers or the employee's own work computer and the think-out-loud protocol. Usability testing sessions were 75-minutes and followed this structure:

- **Initial survey:** Included gender, age, tenure with the organization, job title, department, frequency of intranet use, and device(s) often used to access the intranet.
- **Typical task attempts:** Users attempted to complete between nine and 13 realistic tasks on the intranet. Most of the administered tasks were directed (meaning they had specific criteria for success), while a few were exploratory (meaning they were used to measure engagement and had no success criteria).

## FINDINGS FROM ALL STUDIES

Please note that the screenshots and scenarios in this and the other reports in our intranet series represent only a moment in time. It's entirely possible that some of the intranet designs you see in these reports have changed since our research. Many teams and designers learned from our usability studies and changed their designs immediately after the testing.

In addition, some screenshots or quotes in this report were captured in prior rounds of intranet research. Where they substantiate a long-standing guideline, we've kept the older examples for discussion and instructional purposes. The commentary explains what we learned during the testing, and the design best practices we discuss remain true today and most for years to come. Find a complete list of the organizations who participated in our intranet guidelines research over the years at the end of this report.

## HOW TO USE THIS REPORT

After conducting this research and reflecting on the findings and insights, we have compiled a comprehensive set of recommendations and guidelines to help you make better intranet designs.

### Five Types of Recommendations

Each recommendation in this report falls into one of five categories, displayed differently depending on its type:

1. Design guidelines
2. Definitions, principles, and methods
3. Process and strategic considerations
4. Timeless design tips
5. User behaviors

Following are explanations for recommendation types and examples of how they appear throughout this report: (and the entire Intranet Guidelines Report Series):

## 1. Design Guidelines

These include actionable advice, along with evidence, discussions, and screenshots to help designers make usable, engaging intranet designs, and are the bulk of the information in this report.

Concrete design guidelines and recommendations substantiated by behavioral evidence and years of usability expertise embodied by NN/g researchers appear as in the example below. Some of the guidelines are from previous rounds of research and remain valid today, while others are new with this round of research.

Here's an example of a **design guideline**:

### 59. Avoid using an icon for search on desktop; it's only acceptable on mobile versions of the intranet.

## 2. Definitions, Principles, and Methods

In these callouts, we explain the terms, principles, and methods we suggest you use in your intranet design work. They span UX design and research and are often used on intranets or at organizations in general.

We also define terms, principles, and UX research methodologies in the context of relevant guidelines and discussions. These terms will be bold.

Here's an example of **Definitions, Principles, and Methods**:

### Card sorting

**Definitions, Principles, and Methods**

Card sorting is a UX research method in which study participants group individual labels written on notecards according to criteria that make sense to them. This method uncovers how the target audience's domain knowledge is structured and helps teams create an information architecture that matches users' expectations.

## 3. Process and Strategic Considerations

These are larger-scale initiatives and tactical ideas, or those related to process best practices. They tend to focus less on the design itself but help enable good design. These usually require more time, involvement, and alignment from many people and teams across an organization.

Some recommendations are less about design detail and more about the process or strategic ideas behind designing an intranet. These ideas are too large or unspecific to be a design guideline, so they are categorized under this type.

Here's an example of **Process and Strategic Considerations**:

**Conduct card sorting early.**

Process and Strategic Considerations

Conduct card sorting early in the design process to determine the intranet's information architecture. Card sorting can be done once you know the initial content topics and navigation categories you want to offer on the site.

## 4. Timeless Design Tips

These are general, sometimes basic, good design practices that apply to both intranets and digital design as a whole.

Basic reminder guidelines, many of which continue to hold after decades of research, are included in this report and, in many cases, apply to the design of digital products in general, not just intranets. When one of these more basic recommendations is mentioned in the report, we will call it out like this to denote that it has withstood the test of time.

Here's an example of **Timeless Design Tips**:

**Use clear link labels.**

Timeless Design Tips

Front-load text and navigation links with information-carrying keywords.

### 5. User Behaviors

These describe the ways employees acted as they used the intranets. This doesn't mean your users will act the same way as the ones we saw, but they may behave similarly. There's no substitute for doing usability tests and watching your own employees use your intranet. But, if you're not doing much of your user research, refer to these behaviors as a best guess for how your users may act.

Here's an example of **User Behaviors**:

**Cleaning up browser tabs**

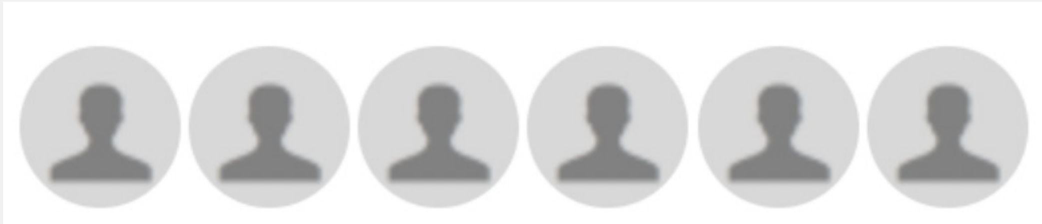
User Behaviors

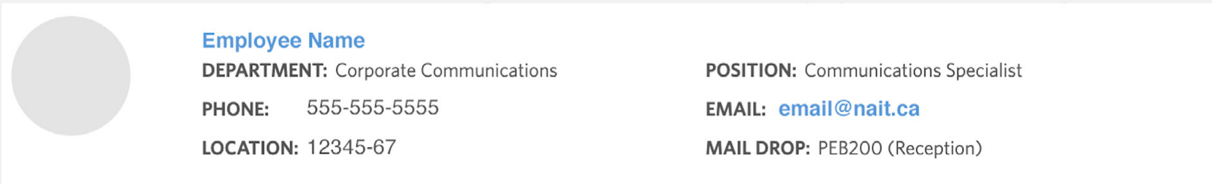
Many employees had several browser tabs open at a time while completing their work or using the intranet. When they encountered links, which opened in yet another new tab, they often wanted to stop and pause between tasks to clean up their tabs. This housekeeping behavior indicated that users felt the interface became cluttered or unmanageable.

## Scrubbed Screenshots

You'll notice throughout this report; some screenshots have been scrubbed to protect the organization's proprietary information. Also, individuals' personally identifiable information, including employee names, phone numbers, office locations, profile photos, and sensitive company information, has been removed or blurred from all screenshots and replaced with placeholder images, icons, shapes, or text.

This is intentional to protect and respect the identities of the individuals and organizations who took part in our research.






*Here are two examples of how we mask participants' personally identifiable information throughout the report. Where you see icons or masked text are areas where an employee's actual photo, email address, phone number, or office location would otherwise appear.*

## LONG-STANDING EXAMPLES

### Cumulative Findings Across All Studies

Some screenshots or quotations in this report were captured in our early intranet research, and given how long we have been studying intranets, some may have been captured **almost 20 years ago**. We've kept older examples that substantiate a long-standing guideline, interesting finding, or discussion. Find a complete list of the organizations that participated in our intranet guidelines research over the years at the end of this report.

Please note that the screenshots and scenarios in this and other reports in our intranet series represent only a moment in time. The intranet designs and screenshots you see in these reports may have **changed since our research.** In fact, many teams and designers learned from our usability studies and modified their designs immediately after the testing.

# Guidelines

# Guideline List

## Guidelines for Intranet Content Types 112

# Developing an Intranet Content Strategy

Employees need quick answers and meaningful information from an intranet. They go there to scan the latest news, find information to do their jobs, interact and collaborate with colleagues, and manage their overall well-being.

If the intranet's content is great, employees will view it as a valuable resource and keep coming back. If the content falls short, employees will perceive the intranet as unhelpful or disorganized and won't use it. As such, it's crucial to get an intranet's content strategy right from the start.

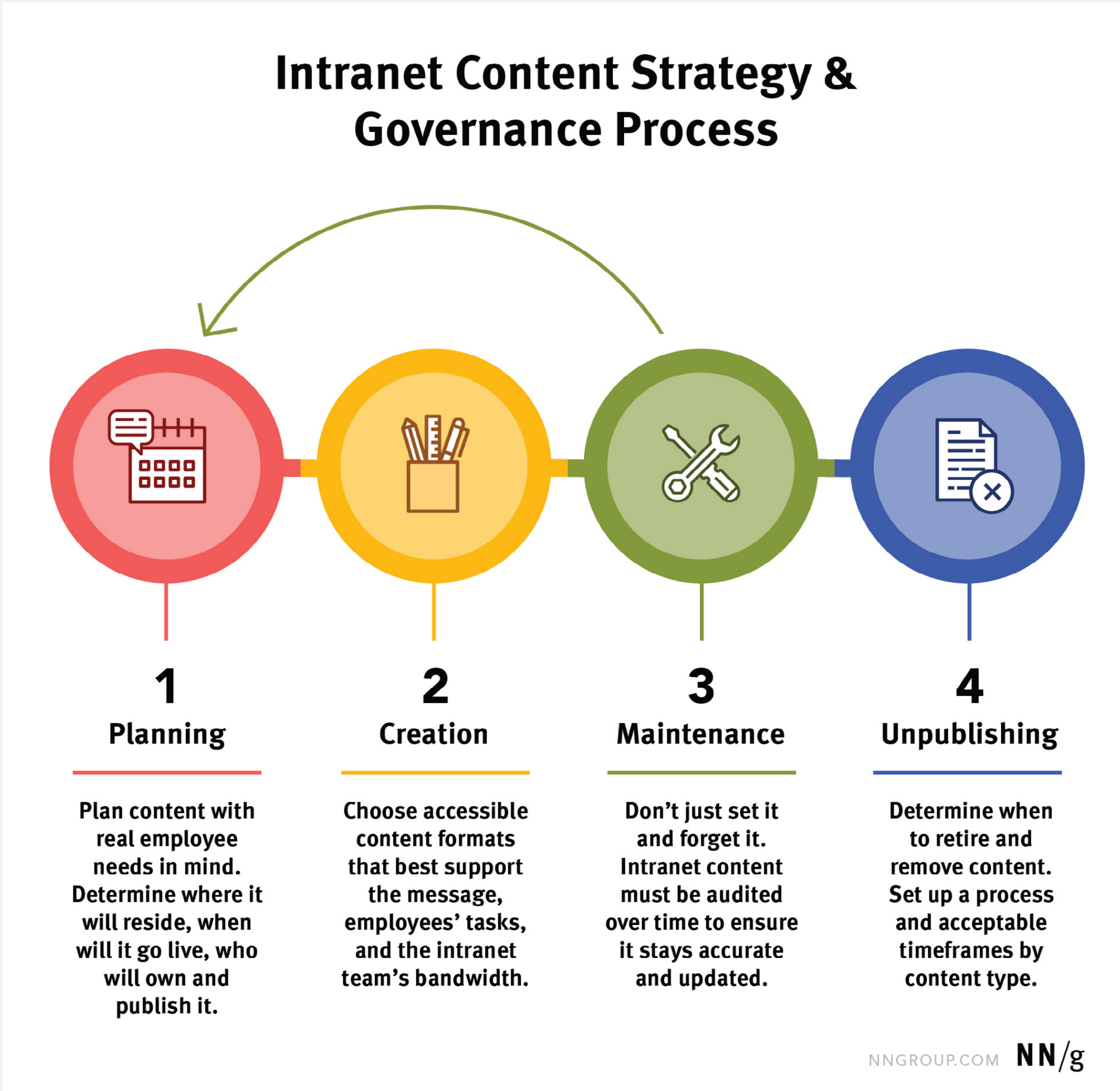
The formal definition of **content strategy** is a plan of action that guides the creation, management, and maintenance of intranet content. A good content strategy ensures that every piece of content on the intranet serves its purpose and is useful, usable, and valuable for **both employees and the organization**.

## A CONTENT-FIRST APPROACH

Whether redesigning an existing intranet or developing a new one, consider the following five questions to inform the intranet's content strategy. This is a good first step to do before work begins on the intranet's design, taxonomy, and information architecture:

1. What **existing content do you have**?
2. Will you **migrate existing content**, **create new content**, or **both**?
3. How will you assess if the content **meets employees' needs**?
4. How will you evaluate if the content **supports business objectives**?
5. How will you **manage content** in the **short and long term**?

Answering these questions before beginning design will give you a clearer direction and set you up for success with your intranet content. If the intranet's content has already grown unwieldy, throttle your content creation efforts and revisit these questions. Also, follow the guidelines in this report to begin the clean-up and improvement process.




*This four-part planning, creation, maintenance, and unpublishing model outlines the most important steps to ensure a successful intranet content strategy and governance process.*

A sound intranet content strategy will include these four parts: planning, creation, maintenance, and unpublishing. Plan new content with employee and organizational needs in mind and determine who will own the content and where and how it will coexist on the intranet. **Creation** involves bringing the content to life and choosing the correct formats to serve the messages. **Maintenance** is all about keeping a close watch on content to determine if it is still needed, effective, aligned to content standards, and accurate over time. When it's not, content often goes back into the **planning** phase to account for and execute any content updates to get it back up to standards. And finally, **unpublishing** keeps the intranet tidy and free from antiquated content clutter.

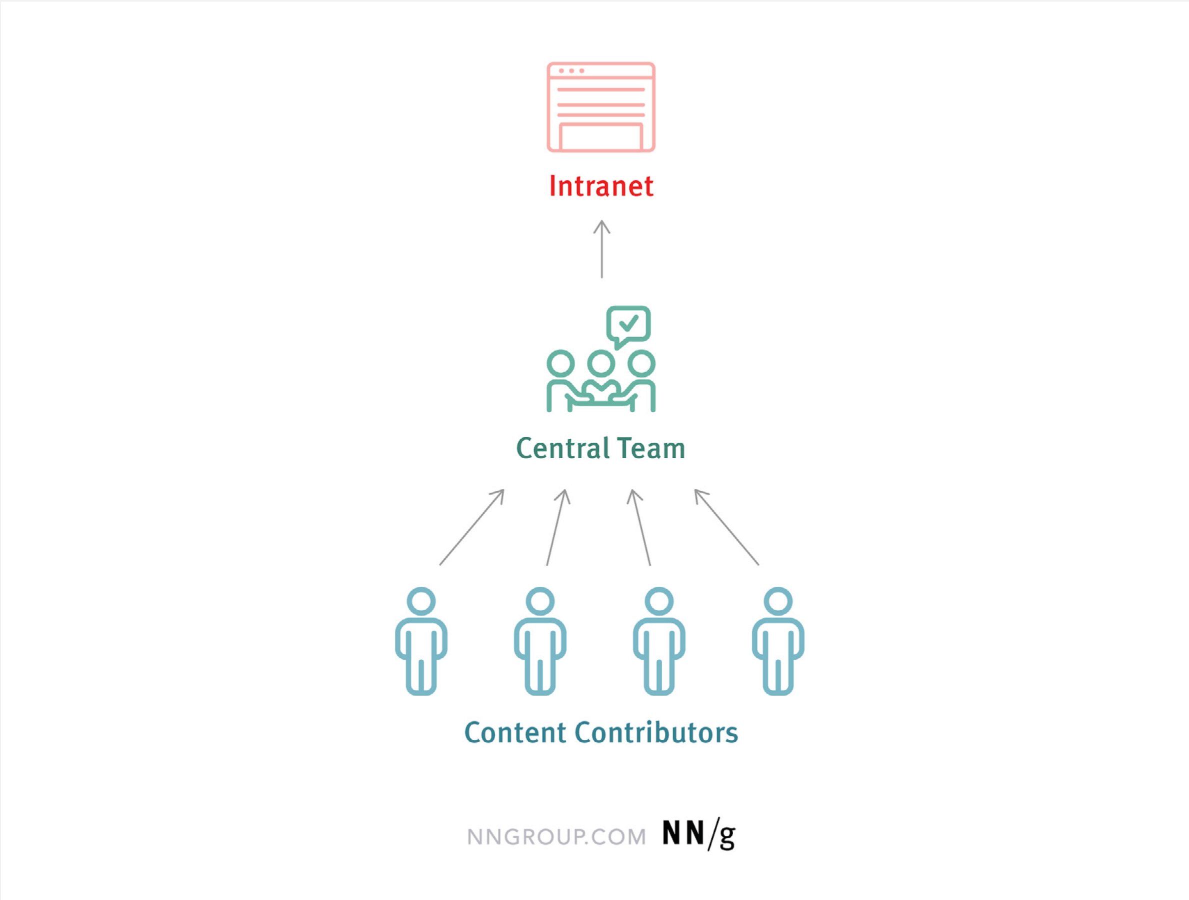
## CHOOSING A CONTENT-MANAGEMENT MODEL

Choosing a content-management model for an intranet is an important predecessor to defining an intranet's content strategy. **A content-management model** is a clear set of roles, responsibilities, standards, and guidelines that concern how and by whom content is produced, published, updated, and retired. We've found through our research; intranets typically follow one of three content-management models:

1. **Centralized content management**
2. **Distributed content management**
3. **Hybrid content management**

### Centralized Intranet Content Management

In a **centralized content model**, a single team (or a small number of teams) owns the production, management, and publication of intranet content. This central team is often a corporate communications team or a dedicated intranet product team.




*In a centralized content-management model, a dedicated intranet team writes and develops all the intranet content after interviewing and partnering with contributors. Or the central team manages content requests and submissions from contributors across the organization. In either case, the central team approves and publishes the final content to the intranet.*

Within a centralized model, there are two possible approaches the core team or teams may take to develop content:

1. **Journalistic approach**
2. **Distributed workload approach**

With a **journalistic approach**, the central team plans and determines the content, when it's created, and where it's posted. They usually partner with or interview individuals and teams across the organization, specifically, the people with the information employees need or the organization needs to communicate. This group usually includes executive leadership, human resources, information technology, corporate communications (if the intranet team isn't already aligned here), and others. After gathering the necessary information and facts, the central team writes, develops, and publishes the content.

For example, when discussing their process, an intranet team member at the Royal National Lifeboat Institution:

> "Intranet content is managed and often written by the internal communications team. They may work with another individual to write the content, but internal communications publish it. This way, the person who knows the most about the content is always the author."

If the central team wishes to **distribute the workload of developing and creating content**, they may allow individuals to submit content requests to the central team. Some organizations have formalized these processes, such as using an online request form or a dedicated email address to manage content requests.

While discussing content management practices, an intranet team member at Atrium Health said, "Something we need to add to our process is a story idea form, where employees could submit an idea for new content. We only have a form to report issues on the intranet right now."

Other organizations used an ad-hoc arrangement to handle requests, where each department had a dedicated point of contact on the central team. This approach is often better, as it increases efficiency, distributes the workload, and minimizes context switching for people on the central team. The Scottish Government's intranet team functioned this way. One team member said, "Subject-matter experts work with our team of three if they need content published or updated."

Benefits of the centralized content-management model include:

1. **Unwanted content doesn't get posted:** In this model, the central team acts as a gatekeeper, so it's unlikely that teams or departments will publish content just because they *think* they need it. Intranets that follow this model tend to have more relevant, up-to-date, and accurate content than organizations that follow distributed or hybrid models.

   When speaking of their decision to manage content this way, one intranet team member said, "We find it to be more of a headache to give control to other departments. We encourage contributors to work with internal communications to get their stories out there."

2. **All content is carefully reviewed**: Because the central team reviews all content before its published, content standards and guidelines for formatting and presentation are more strongly enforced.

3. **Fewer people need to be trained**: Many organizations encounter challenges with hard-to-use content-management systems (CMS). With a centralized model, only the central team members need to use the CMS frequently, so there is no need for widespread, ongoing training for those outside the central team. Additionally, the central team doesn't need to train employees on how to write for the web, as its core team members are the only ones responsible for ensuring that the published content meets the necessary standards.

4. **The central team has a holistic understanding of the depth and breadth of intranet content:** Given that all content or requests for content come through the central team, its members understand what information is already available and where it lives on the intranet. When new content is added, they know where to place it, how to tag it, and what pages should link to it. Additionally, maintaining consistent content is more likely when fewer people are publishing, simply because there's less risk of deviation from the agreed-upon formats or templates. Duplicate or redundant content is also less likely to be posted following this model.

A few drawbacks or risks associated with a centralized content-management model include:

1. **It's time-consuming for the central team:** There must be ***fully dedicated*** **people who own the content.** Full-time allocation is usually required to create content or to review content requests using this model. One intranet team lead said,

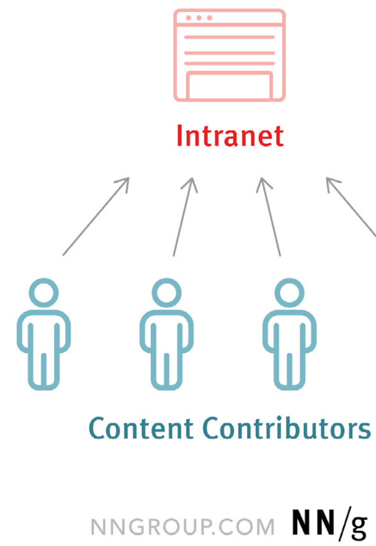
   "We work in the Sitecore CMS itself, and our clients can see a preview in the development site environment. They usually like what we create, but they don't always know what they want. They want it to look good, but we want it to actually be useful. People always say they need the content quickly, so we do it as quickly as we can. It's one thing if you're talking about two paragraphs, but something else if you're talking about creating a video; that's going to take more of our time."

2. **Slow content-production cycles:** Much planning and lead time are needed before content can be published to the intranet. In some cases, this lead time deters content creators from publishing frequently, and instead, they share information by other means they feel are more efficient, such as through email or chat. These practices ultimately make the content on the intranet shallow and less useful to employees.

## Distributed Intranet Content Management

In a **distributed content-management model**, content production is democratized. Instead of having a central team create, approve, and publish new content, ownership of these tasks is spread across the organization. Often, if there is a central team, they only create user accounts on the content management system and provide initial training to new publishers. In this model, a central team may also control the intranet's global navigation, certain content features on the homepage (e.g., a news carousel), and search functionality.

For example, one intranet team member described their distributed process: "Our internal communications team owns the homepage carousel and populates it. Everything underneath that is democratic. Staff can log in and post any item, news, or even a photo. They can share any piece of information they want."




*In a distributed content model, content administrators across the organization can freely create, edit, and publish content to the intranet.*

The benefits of adopting a distributed content-management model include the following:

- **A greater sense of ownership and engagement:** Typically, intranets following this model tend to have a more inclusive culture where everyone can share freely on the platform. Content may also be more interesting and varied with this model than with an intranet with a centralized model. For example, an intranet team leader said of their recent transition to distributed content management:

  > "We've seen teams posting so much more content. It's content that's more relevant than what we'd ever be able to write, post, or make relevant for them. A lot of what they're posting is just so good that we want to use it as examples for others or post it on our corporate site. We don't need to do a lot of content polishing and editing; it is a top-notch company. We don't want perfection to be a barrier; I try to give content creators quick pointers like, link to this or bullet-point that. I made a video to quickly show an edited version of a piece compared to an unedited version to show that it's not much work to look for these small details that really make the content better. On our previous intranet, most people went through us to post all of the content or IT. In terms of corporate services, their news all came to us. Now people can post news, it's easy; easy to build pages, and people are empowered to manage the site themselves."

- **Quicker content production cycles:** Important content can be published or updated quickly, as publishers don›t need to seek approvals. This is especially useful in organizations undergoing lots of change. For example, at the General Services Administration, an intranet team member said of their distributed model:

  > "We don't own the content; once authors are trained, they can manage and create their own content. We don't have any approval processes, and authors don't need approval from us to publish. The intranet team can create the top two levels in the navigation, and then distributed authors can control the rest. For template changes, they send an email to our group inbox, and if they want to create a child page under a locked page, they *do* need approval for that."

Drawbacks and risks associated with a distributed content-management model include:

- **The central team lacks authority:** Though this is the point of the distributed model, one common complaint we heard from intranet teams using this approach was that they felt they had no control over the content. They lacked the authority to push back when groups haphazardly posted unnecessary, poorly written, or improperly formatted content.

  For example, at the Mayo Clinic, one member of the intranet team described many of the challenges they faced as a large organization following a distributed content-management model:

  > "The distributed publishing model leads to a lack of control, so we get a lot of outdated content. We also have a lack of control over what's out there and how tools are used. People aren't using tools properly, and things break. We have no control over any of it, especially in regard to support; if people have an issue, they've done some crazy things with the tools themselves."

  A similar sentiment was echoed at Atrium Health, where a member of the intranet team said:

  > "HR is working with a vendor for the first time, and they approached us and said, *this is what we are doing*. We can't control or create their content, but we tend to think that what we get is not always final, so we end up going through many revisions. I know it's not great for usability, but we don't have the control to enforce standards."

- **Heavy guidance and training are required:** The central team must support new content creators by providing CMS training, information on best practices for web writing, and standards of use for specific page layouts. The CMS also needs to have easy and descriptive input forms for creating and publishing content, as well as examples and tutorials for what to do and what not to do. In the absence of such guardrails, content administrators may too freely edit raw HTML or use whatever they think looks best for page layouts. Undoubtedly, these practices lead to inconsistencies and negatively impact the user experience of the intranet. Ongoing training and guidance are usually required to correct these bad habits.

An intranet team leader at the City of Calgary described his team's process of moving from a centralized content-management model to a distributed content-management model:

> "We took centralized management too far, so we are transitioning to distributed content management. There are limited resources, though; a lot of people are already trained to provide content, but we will get more people trained to manage content for their business unit and post it to the intranet."

- **Regular auditing is critical:** Not everyone is skilled at writing for the web, nor is it realistic to assume that nondigital experts can quickly pick up the necessary skill sets needed to manage content effectively. Despite providing content style guides and standards, content publishers will often fall prey to bad practices when creating content.

  A central team needs to maintain a **content inventory and auditing process to keep content useful and usable**. Common problems that need rectifying include blank pages created because there's an expectation that they will be needed but then go unused, a lack of helpful page descriptions, and poor metadata authoring, including page titles, meta descriptions, and topic tags.

  For example, a team member at First Solar described how they encountered this problem and, as a result, moved from a distributed content-management model to a hybrid model:

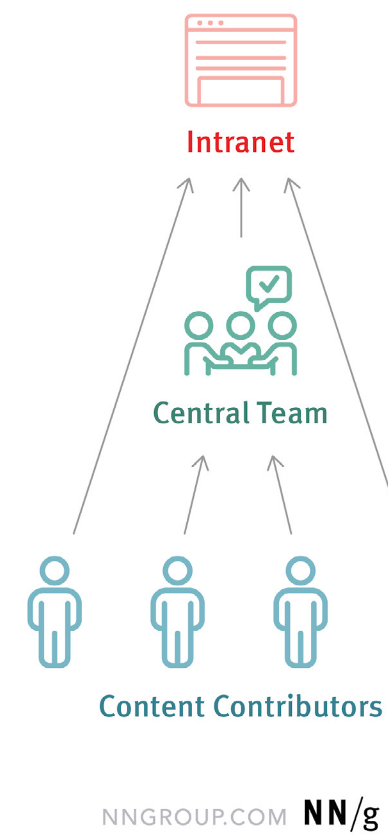
  > "We wanted to control the growth of the sites. Publishers would freely create new sites and didn't really need them. We didn't always know it was happening, so we had a lot of disjointed content. We don't let just anyone create new sites anymore."

- **Quantity over quality:** Intranets that follow a distributed content-management model often have far more pages than those following one of the other models. If you decide to go with either the distributed or hybrid content-management models, where you're relying on and trusting (to some degree) employees across the organization to write and post content, you might worry that you won't get enough content for various reasons. Maybe employees won't want to post. They may be shy, believe their content isn't worthy, or perhaps they're too busy with their full-time job responsibilities to contribute. That's often not the case, and organizations must worry more about the opposite problem; having so much content that it becomes impossible to manage and, even worse, find.
- **Content siloed by department:** To make content production easy for publishers, the intranet's IA is often structured around departments and the pages they *own.* Giving HR admins access to one HR page is much easier than expecting them to update elements on 10 different pages. However, this approach often means that the way the content is organized doesn't naturally support employees' tasks.

- **Inconsistent quality and tone of voice:** When many different people create content, its style and tone can vary dramatically. The inconsistency isn't as problematic as on a consumer-facing site, but it does degrade the employee experience if one area of the intranet is friendly and casual, and another is authoritative and formal.

## Hybrid Intranet Content Management

In a **hybrid content-management model**, some content is owned by a central team, while other content ownership is distributed. A central team will often manage the homepage and the top-level landing pages in the navigation. Requests for new navigational items or top-level pages are usually made to the central team.




*In a hybrid content-management model, a central team acts as a gatekeeper for some content, while other content can be freely created, edited, and published by content admins across the organization.*

Secondary and tertiary-level pages are usually controlled by content admins who are distributed across the organization and, ideally, adhere to publication standards and guidelines. They have the freedom to create additional subcategory pages on their own and edit content as needed. This hybrid model provides a nice balance, providing freedom to create content within an experience framework: anyone can contribute content to the intranet, but admins help to ensure it meets the standards for relevance, writing style, and presentation before it's published and on an ongoing basis. This approach keeps intranet content relevant and tidy over time. For example, one intranet team following the hybrid model said:

> "Lots of pieces of content are owned by different people. Teams will own the content itself, and the intranet product team will provide the structure. We will sort of be custodians too. We want to give leeway but also some structure to see how much we need to step in to make sure things don't get confusing."

The benefits of adopting a hybrid content-management model include the following:

- **Provides control over the intranet's structure and widely important content:** The structure of the intranet's navigation and content is fixed at the top level, and any changes at this level are well-thought-out. The most relevant pages and those accessed by the majority of employees are closely monitored and managed by content and subject-matter experts. The sections relevant only to specific groups, departments, or teams are managed by appointed content admins in those groups.
- **Provides an appropriate level of freedom for responsible content admins:** Unlike in a centralized model, where employees in specific groups or departments might complain about a lack of control over the content, in a hybrid model, content publishers in departments are given more control. Admins can provide their subject-matter expertise for the topics covered in the content. At the same time, digital and usability experts can maintain the organization, presentation, and communication nuances needed to provide a good digital experience.

  A content admin following this model mentioned that it was helpful to have a web team at the central office that could help if they were struggling. She said, "Usually, the web team responds within 24 hours. It's a good feature that makes my life easier. Most of the time, they'll fix an issue for me or walk me through how to do it."

Drawbacks of the hybrid content-management model include:

- **Requires moderate training:** Though a smaller number of content admins are needed, a hybrid approach still requires proper training on how to use the CMS, write for the web, and how to use page-level components, albeit not as much training as what›s needed to support a fully distributed content-management model. One of the team members at the Co-operators described its hybrid process:

> "Business partners own the content on their subsite. We create the template site for them, but they own and manage the content. We train them to think about the user. Some people spend their whole day on the intranet, and others may not spend much time there at all. As for publishers, they spend the majority of their time there, anywhere from half to 85%."

- **Requires moderate standards and auditing:** Content on lower-level pages still needs to follow specific standards and be tracked and audited. However, this effort usually is much lower than what's needed in a distributed content-management model. For example, an intranet team lead at the Northern Alberta Institute of Technology said:

> "We do have some communications staff who have dedicated portfolios and support those clients. They don't create all of the content, but they are the conduit. Administrative departments have someone from the communications team who is dedicated, and then each department has at least one person who looks over the department's intranet content."

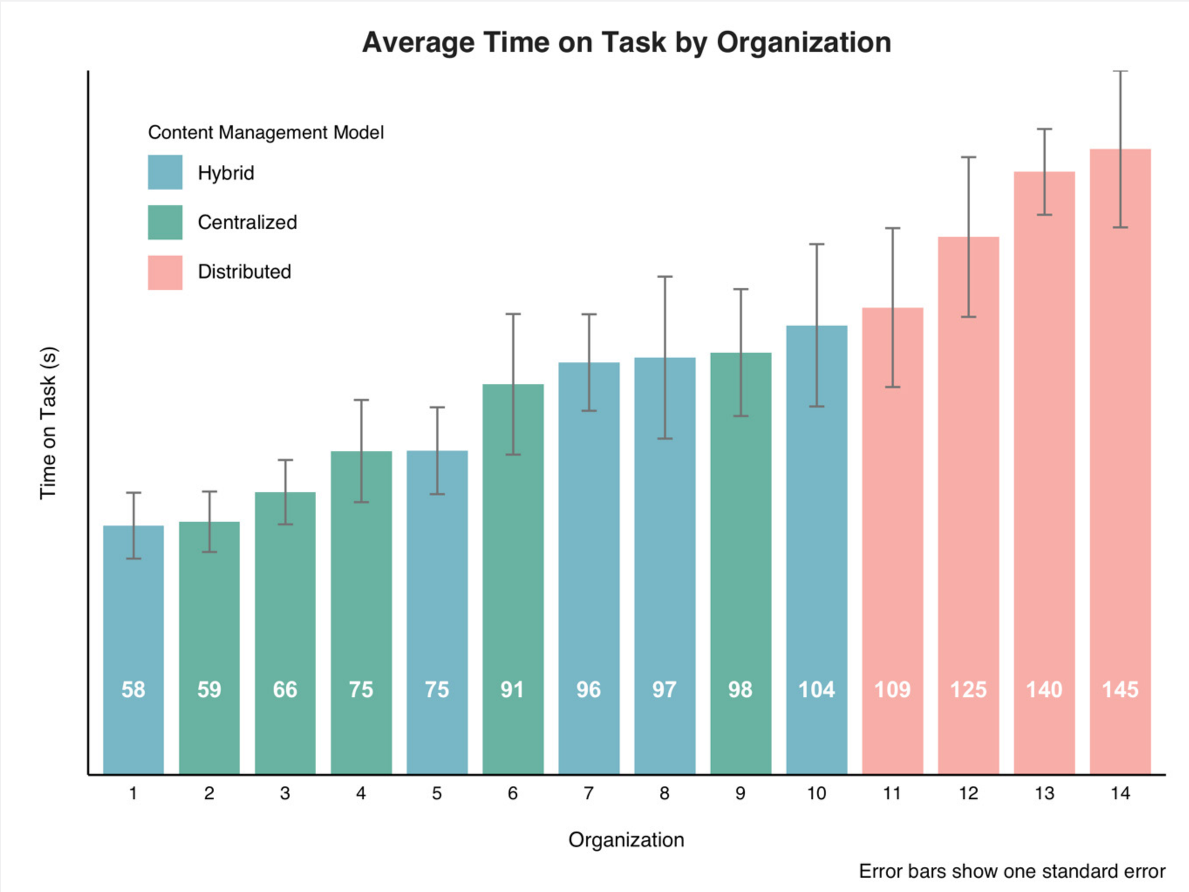
## Which Content-Management Model Is Best?

In addition to the benefits and drawbacks we outlined for each content-management model, we also looked at how employees' task times and success rates varied across the intranets we studied. We wanted to understand if users completed tasks on intranets more successfully following certain content-management models and if it took users longer to complete tasks on intranets following one model over another.

In our most recent study:

- 5 organizations followed the distributed content-management model
- 5 followed the centralized content-management model
- 4 followed the hybrid content-management model

When we looked at ranked performance for time-on-task, we observed that intranets following centralized and hybrid content-management models took the top 10 rankings for time-on-task, whereas intranets following the distributed content-management model took the bottom four places for time-on-task. Additionally, the three intranets with the highest success rate — where the success rate was 87% or higher — followed centralized models.

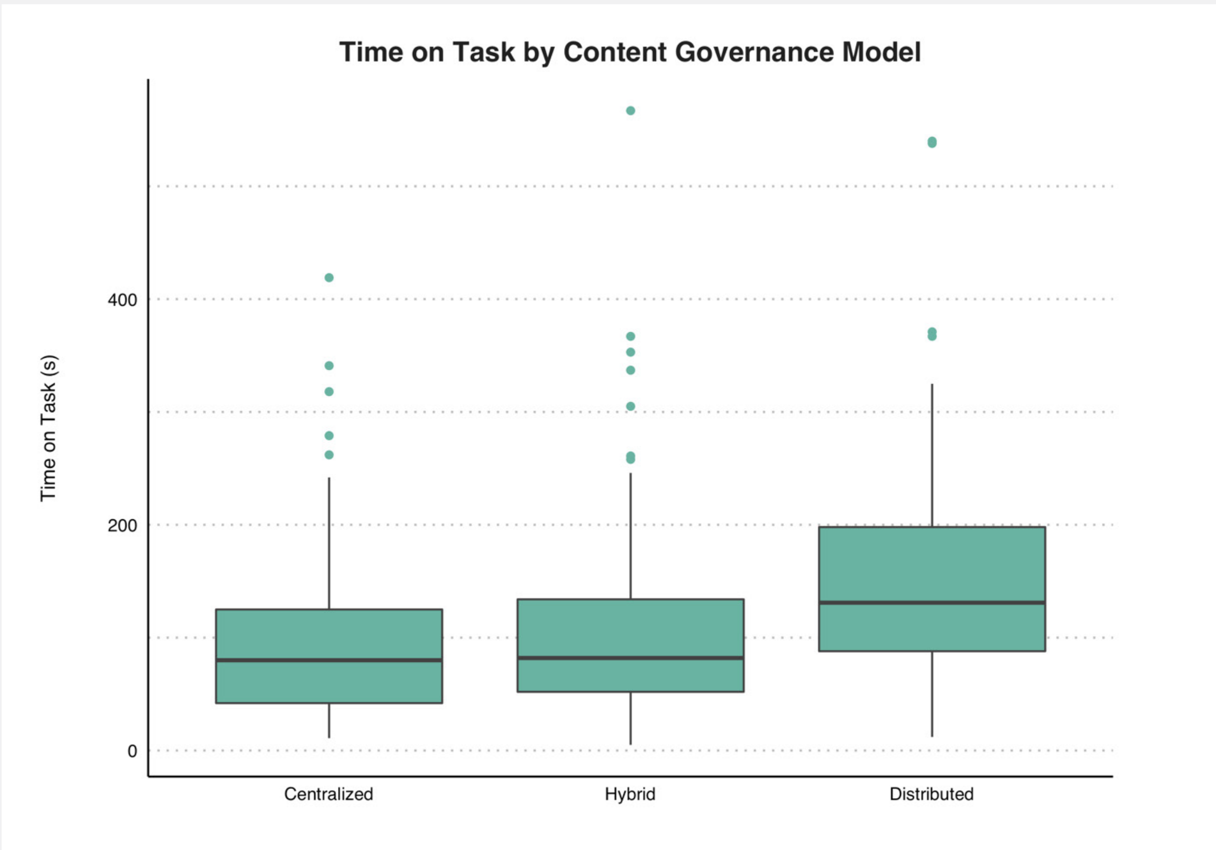



*The graph above shows how each organization's intranet performed for time-on-task. The average used is the geometric mean. The top-performing intranets with respect to time-on-task in this study followed either centralized or hybrid content-management models. (Note: We did not include KeyBank because we did not test its corporate intranet.)*

| Content-Management Model | Median Task Time | Success Rate |
|---|---|---|
| Centralized (*5 intranets*) | 80 seconds (1:20) | 80% |
| Hybrid (*4 intranets*) | 82 seconds (1:22) | 73% |
| Distributed (*5 intranets*) | 131 seconds (2:11) | 73% |

To understand whether there was a significant difference in success rate and time on task, we performed statistical tests by collating scores from all organizations that followed the same content-management model. While it seemed that organizations following a centralized model had higher task success rates than the other content-management models, a chi-square test revealed **no significant difference between the three models (p>.05) with respect to success rate.** This may be because many factors determine whether users succeed in accomplishing tasks on an intranet, such as how strong the IA is and the interface's usability.

However, a Kruskal-Wallis test revealed **a highly significant difference between the average time-on-task for the three content-management models** (p<.001). A post hoc test showed that the difference between intranets following a centralized model (median = 80) and intranets following a distributed model (median = 131) was highly significant (p<.001); in addition, the difference between the hybrid model (median = 82) and distributed model was also highly significant (p<0.001). The difference between the centralized and hybrid models was not statistically significant (p>.05).




*The graph above shows the time-on-task scores for organizations that followed a centralized, distributed, or hybrid content-management model. Intranets following a distributed content-management model performed significantly worse for time-on-task in our usability tests than intranets following a hybrid or centralized content-management model.*

While it's possible to have a successful intranet while following a distributed content-management model, the data suggests **having some central content management is advantageous for helping employees quickly and efficiently find the information they need.**

Employees may have had higher task times on intranets following a distributed content-management model because their structure inherently places them at a greater risk of having miscategorized, incomplete, irrelevant, inaccurate, improperly formatted, poorly written, or outdated content. This is especially true if the foundational aspects aren't in place to support the distributed model properly. If you decide to go with a distributed content-management model, address these risks *before* the content becomes unhelpful. Having a central team responsible for curating and controlling the production process leads to stronger, more effective content in the long run that requires less training, guidance, and ongoing maintenance. Additionally, in this manner, there's less risk of content getting out of control with so many people across the organization freely creating and publishing.

Choosing the right content-management model for an intranet and organization depends on a variety of factors, including the size of the organization, the goals of the intranet (is it a platform to connect employees across distributed offices, or is it meant to support productivity, benefits, and corporate news?), the capacity of the team that owns the intranet content, and the level of buy-in and support from senior leadership and the intranet's sponsors. Understanding what's needed for each content-management model to succeed can help you choose the right one for the betterment of the intranet and, ultimately, the employee experience.

# Foundational Guidelines

Content is a key factor in how organizations effectively drive users to the intranet on a regular basis. The intranet can be a valuable resource for employees to find news and information about the organization and to access tools that help them in their daily work. Different organizations face different content challenges. Some intranets have too much content, while others are disorganized or have an abundance of content or too much outdated content. Few people may contribute intranet content, or many people may contribute, leading to much variance in terms of content quality and uniqueness. Delivering the right content at the right time is a perpetual challenge. Follow these foundational guidelines to set up your content for success right from the start.

## 1. Include channels on the intranet that allow you to collect ideas for diverse and engaging content from employees and stakeholders.

Creating noteworthy content that's valuable for employees *and* the organization is often easier said than done. What the intranet team or publishers deem interesting and meaningful may not actually be for employees.

Creating ways for stakeholders and employees to share ideas for what content they need or would like to see on the intranet, as well as working with key groups across the organization, and conducting regular user research, are all good methods for keeping intranet content that is current, diverse, and engaging.

### Conduct a content inventory and audit.

**Process and Strategic Considerations**

Before diving too deeply into creating *new* intranet content, it's important to consider the intranet content you already have. It's probably there for a reason, and you'll want to determine what that reason is.

One of the best first steps to take to ensure content remains diverse and engaging is to conduct a **content inventory and audit**.

These activities will help you and your team understand what's already working well (or not working so well). This is valuable knowledge to have when creating new content or deciding what to do with any existing content.

### Content inventory

**Definitions, Principles, and Methods**

A **content inventory** is a list of every piece of digital content you currently have, captured at either the page or asset level. It includes specific characteristics about each piece such as its name, the URL or link where it lives, the author, owner, or source, the subject matter or topic to which it relates, the format (article, video, image, etc.), its creation or last-modified date, metadata, and where raw assets reside.

### Content audit

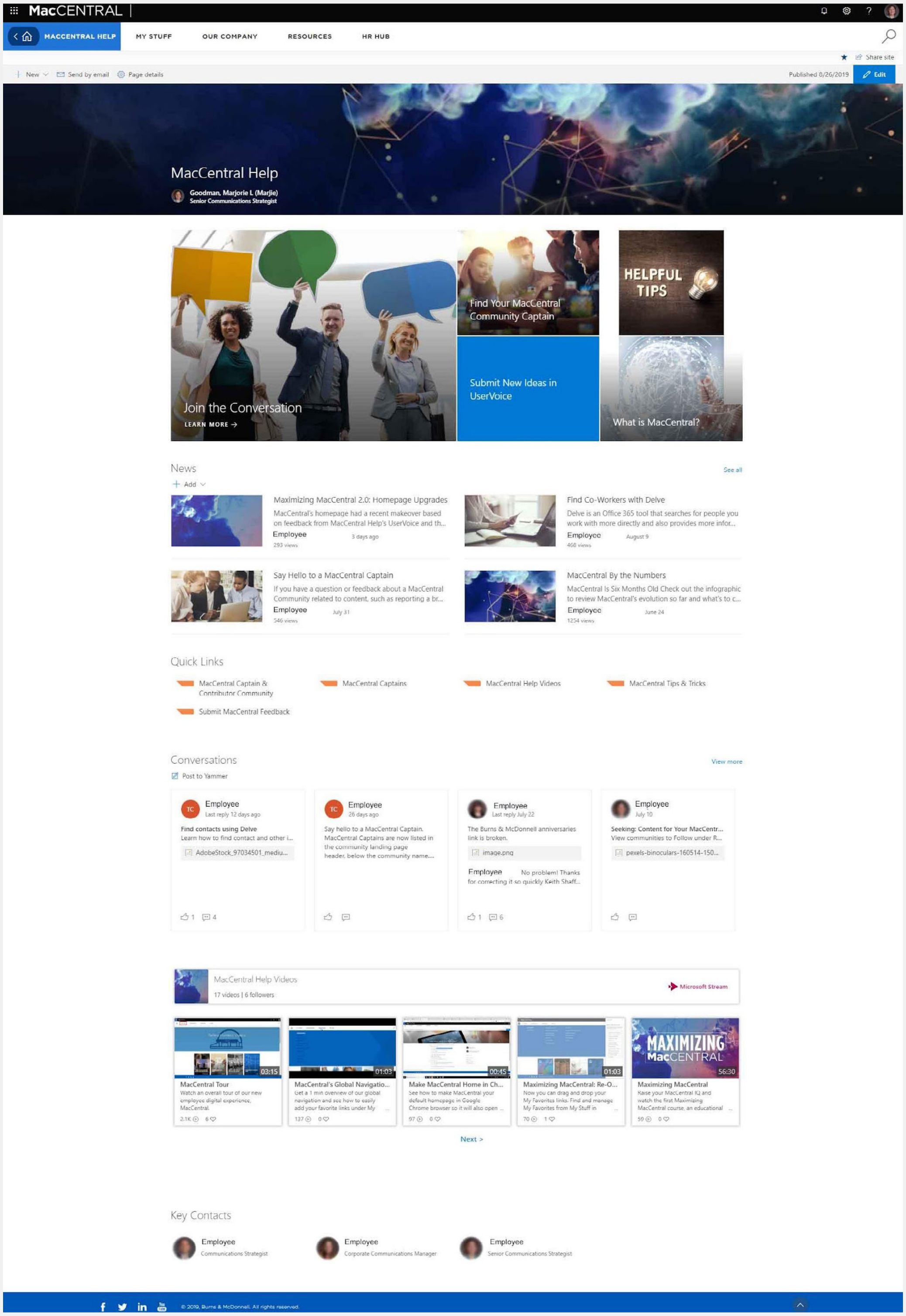
**Definitions, Principles, and Methods**

A **content audit** examines, assesses, and evaluates the quality of the content listed in the inventory. Audits uncover content that needs updating, where gaps exist that new content could fill, and if certain pieces of content are ready for removal. Content is usually audited against best practices for web writing and an organization's own set of standards, user needs, goals, and performance metrics.

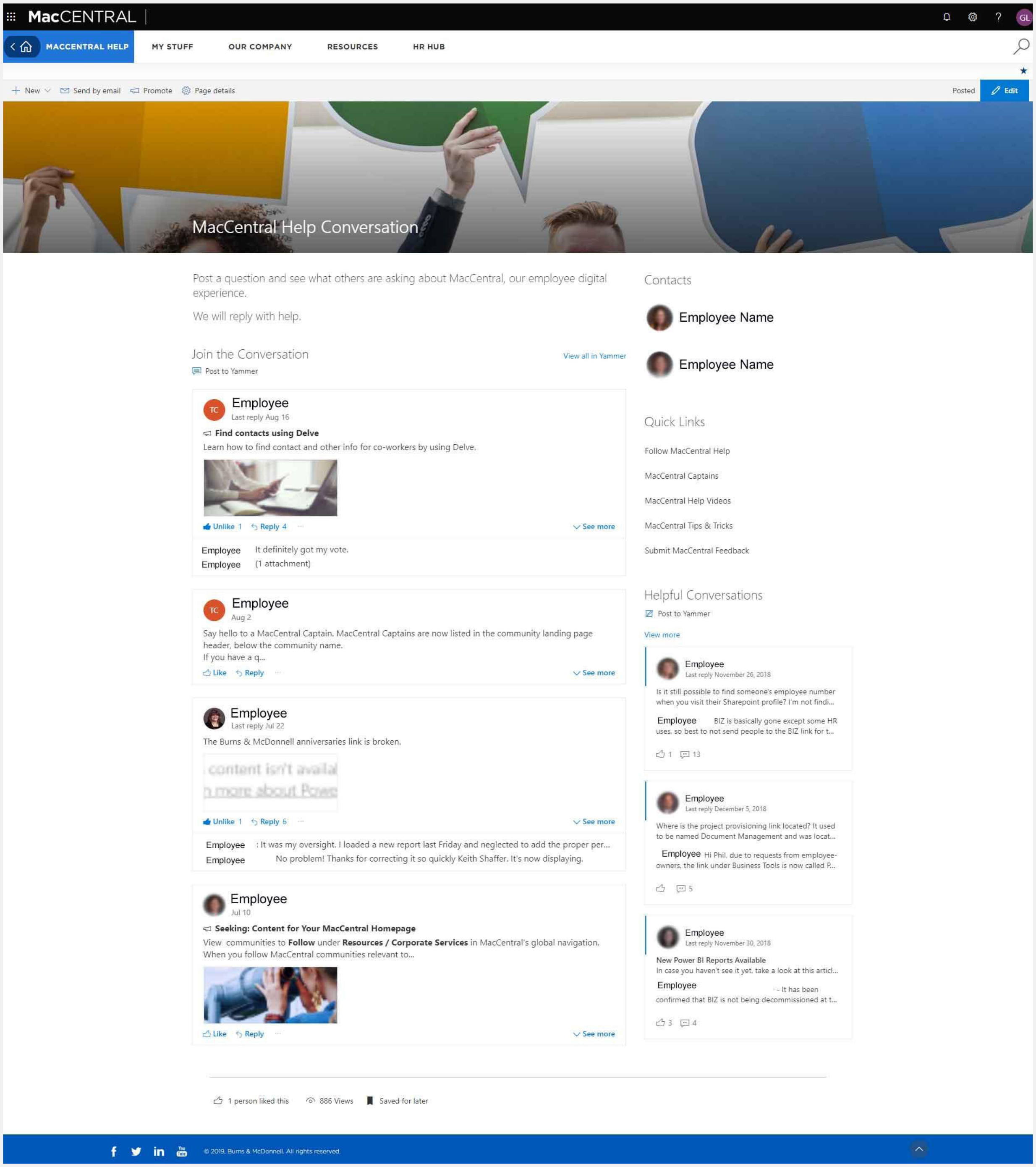
Many organizations we studied included a form, email address, or dedicated social channel in the intranet's design, where employees and stakeholders could freely submit feedback and new content ideas. The ideas, feedback, and submissions received via these mechanisms were checked often by the intranet team members responsible for content strategy. We found that the intranets with the most engaging content had teams that genuinely listened to the feedback and ideas they received from end users, which then informed what appeared on the intranet.

For example, the team at Burns & McDonnell used the platform UserVoice to collect and upvote ideas for new content and overall intranet improvements. Employees could submit new content ideas through a simple form or comment on existing ideas or suggestions from other employees. They could also vote on the ideas they thought were most valuable and wanted to see come to life on the intranet.

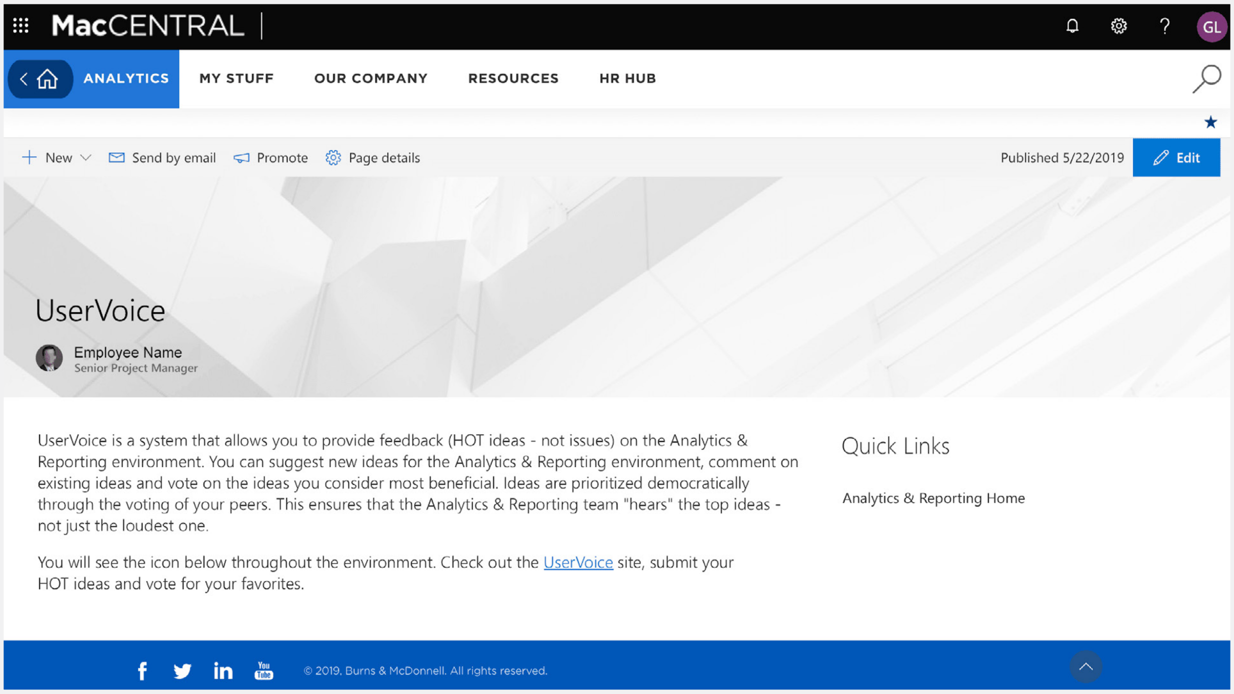
Because many employees weren't familiar with the UserVoice platform, Burns & McDonnell included clear text describing it and distinctly outlined its purpose. Additionally, links to UserVoice were available throughout contextually relevant areas of the intranet and in the main intranet *Help* section. This made it easy for employees to find and submit new content ideas, no matter where they were on the intranet. A dedicated Yammer channel for submitting new content ideas was available from the same *Help* page.




*On Burns & McDonnell's intranet, employees could find a link to submit new content ideas on the* Help *landing page.*

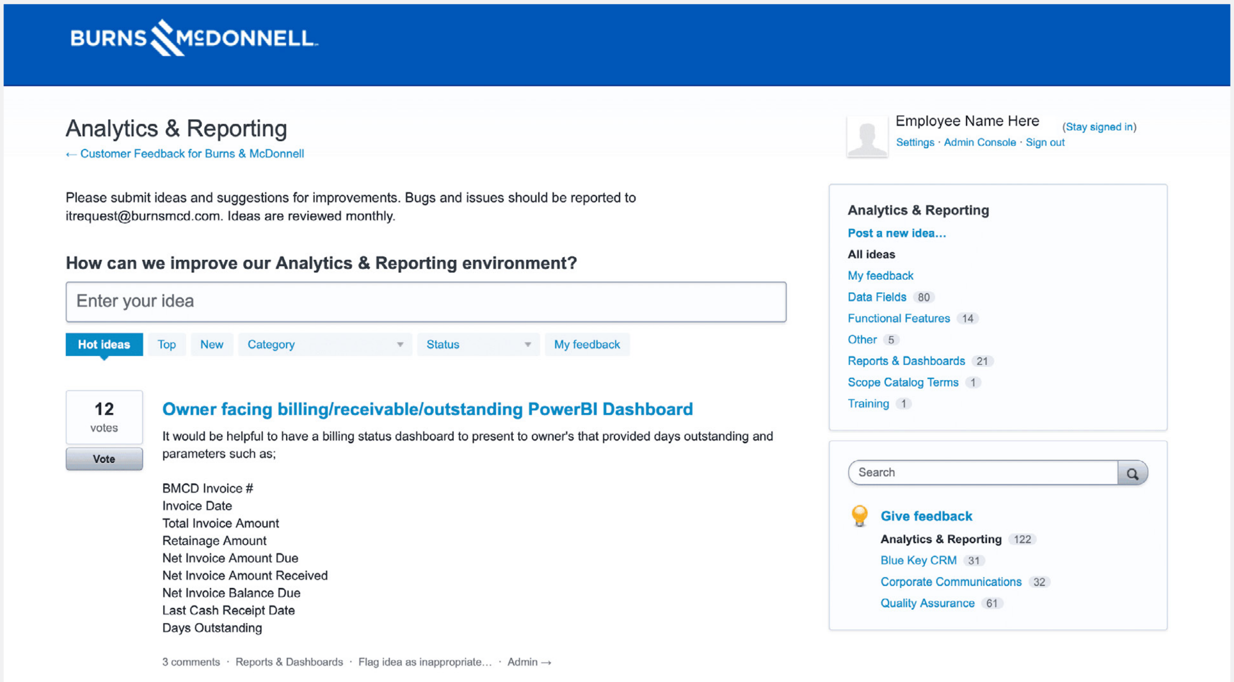



*Questions, ideas for new content, and general intranet feedback also came through a dedicated* Help *Yammer channel that, like UserVoice, was linked from the main landing page of Burns & McDonnell's intranet.*




*In other contextually relevant areas of Burns & McDonnell's intranet, such as in the Analytics & Reporting team's section, employees could learn what UserVoice was, where to find it, and how to use it to submit new content ideas.*

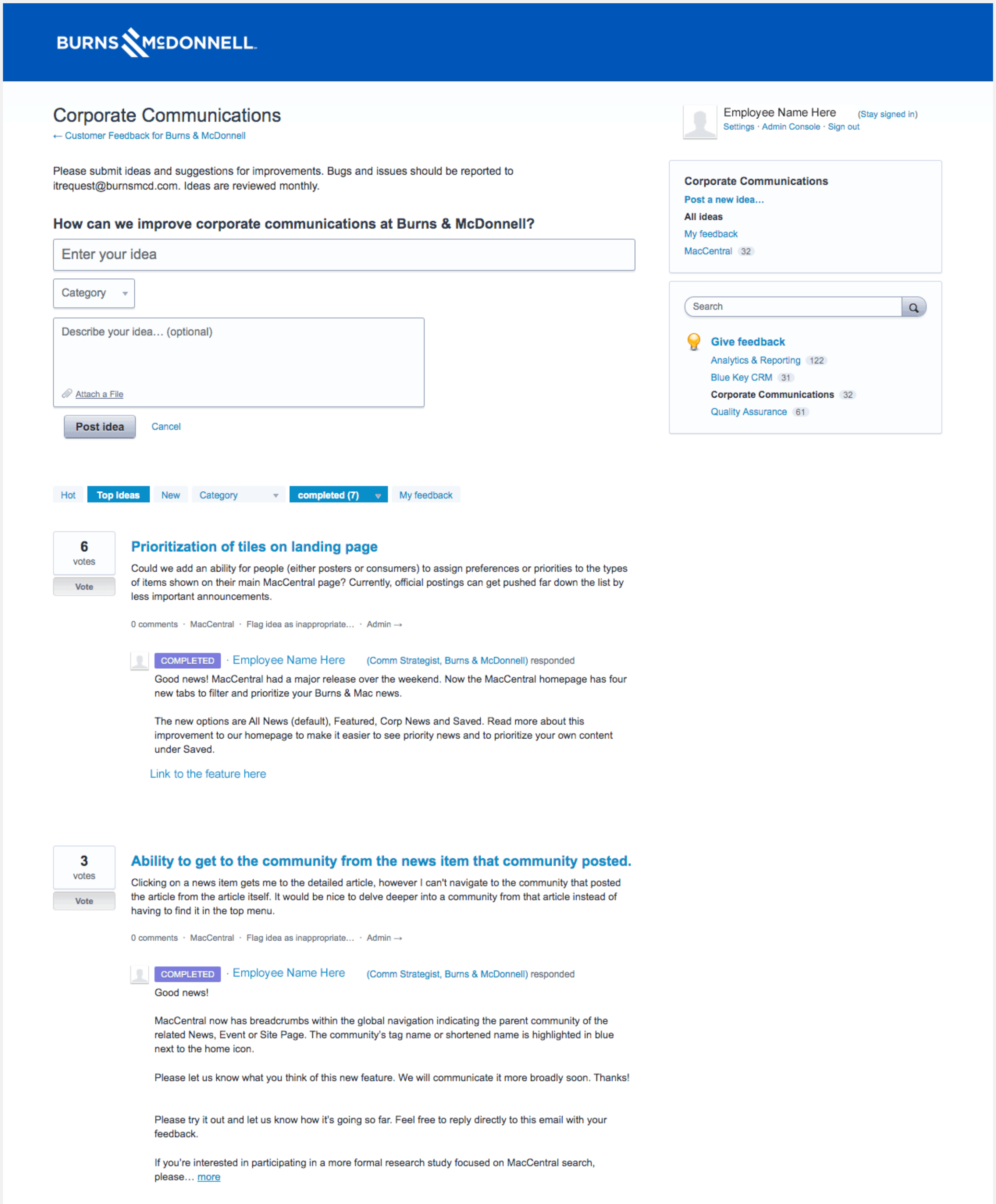
In the text above the UserVoice form, the team explicitly stated it wasn't intended to capture information about bugs or report functional issues. This way, the content team didn't have to sort through those types of comments when reviewing new content ideas. Employees could use an email address displayed on the same page to report bugs and functional issues. The text also stated that ideas are reviewed monthly, which was both transparent and favorable.




*Within the UserVoice form, Burns & McDonnell included text that informed employees they should not use the form to report bugs or functional issues. It also stated the frequency with which the intranet team would review new ideas, which is favorable.*

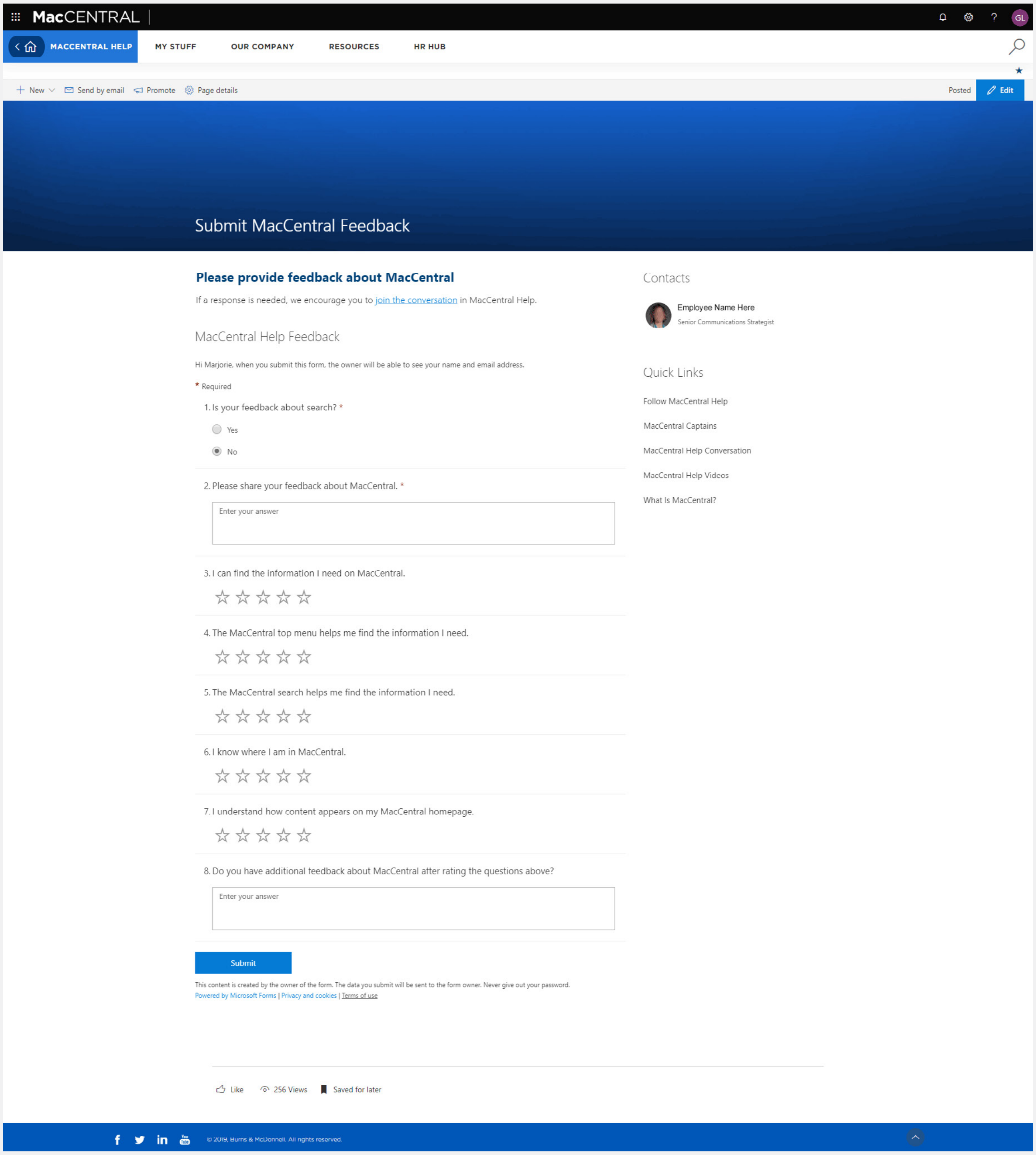
The UserVoice form in the Corporate Communications section of the intranet was where most of the new content ideas and suggestions for improvements originated. Employees or stakeholders could share their ideas, assign them to a category, and even upload an image or sketch alongside a description. Users could also engage with a set of tabs to see the *Top*, *New*, and Hot ideas (most votes and comments), ideas by category, and their own ideas.

Another good feature of this approach was that the corporate communications team could comment back on each idea to inform employees when their suggestion went live on the intranet. This helped employees feel like their ideas were being heard, which drove further engagement and encouraged employees to keep submitting new ideas and improvements to existing content.




*The UserVoice form in the corporate communications area of the intranet received the most suggestions for new content ideas and improvements. Members of the intranet team commented back on the ideas to tell employees when new features and content ideas went live on the intranet.*

Furthermore, the team at Burns & McDonnell included questions about the intranet's content in the general feedback form. In addition to asking questions about the information findability, the form also asked employees whether they understood how content appeared on the homepage. The team shared that this is another area where many good ideas for new intranet content begin.




*In addition to using UserVoice to collect new ideas for intranet content, Burns & McDonnell also used fields in its intranet's general feedback form to garner content ideas that are diverse and engaging.*

### Set a vision for intranet content.

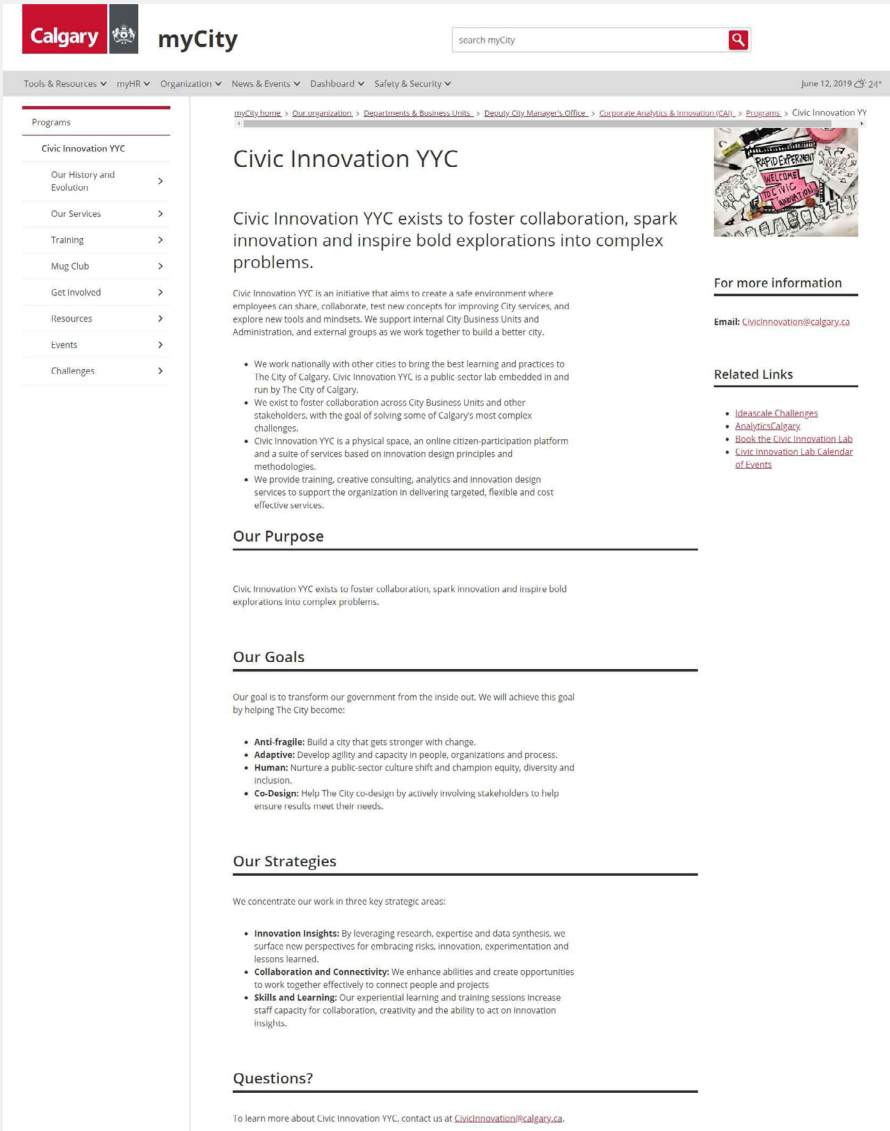
**Process and Strategic Considerations**

A vision is an impactful, future-state view of the experience employees will have at an organization. The vision should guide every piece of content created and posted to the intranet. Additionally, the vision should inform what new ideas appear on the intranet.

When teams and individuals create intranet content, they should ask themselves if the piece brings the organization closer or further away from achieving the intranet's vision.

Without a strong vision for the intranet's content, it can too easily morph into a disorganized and misguided mess of pages, posts, and documents.

In another example, the City of Calgary dedicated an entire section of its intranet, *Civic Innovation*, to gathering new ideas and input for overall improvements to the intranet and city services. Employees could upvote ideas others submitted, which helped to get the collective creative juices flowing across the organization. The intranet team also used daily polls to generate new content ideas and included an email address on the main landing page, which employees could use to share suggestions. The vision content on the landing page clearly communicated its mission and objectives, which motivated employees to contribute ideas.




*The City of Calgary used an area of its intranet called* Civic Innovation *to encourage employees to share new ideas for interesting and engaging content and suggest overall improvements.*

### Use surveys, user research, and ideation workshops to generate content ideas.

**Process and Strategic Considerations**

In addition to intranet channels, some organizations conduct surveys (quarterly or annually) to understand how employees perceive the intranet's content and to generate new ideas and topics. Other teams sat down and individually interviewed employees to learn about their content ideas and what they needed from the intranet.

The most mature intranet teams committed to conducting ongoing user research, such as user and stakeholder interviews, to directly observe employees while they worked, and usability testing to keep the intranet's content fresh, engaging, and varied.

When new authors begin working on the intranet, try brainstorming with them to develop ideas for appropriate, engaging, and interesting content. Content authors bring insider knowledge and expertise to the conversation. If intranet team members know the content strategy for the site, they can provide insights into what makes content engaging.

Discuss what makes content in other areas of the site successful, what unique additions the author can bring, and what helpful information should be added, or even discuss ideas for new formats, such as video interviews with experts or photos from projects.

Good content comes in many forms and formats, and there are many ways to uncover ideas for engaging and diverse topics.

## 2. Name pages and documents clearly and consistently before publishing on the intranet.

Following a consistent naming convention for pages and documents will help ensure the intranet remains usable and useful for employees and content publishers alike. Without standards for page and document names, publishers may name things inconsistently or, worse, incoherently. When this happens, content becomes hard to find, both in navigation and search. When pieces are named too similarly, it becomes difficult for users and publishers to decipher between them when updating various pages or content assets.

### Update content often but at an appropriate frequency to avoid overwhelming employees.

Process and Strategic Considerations

Don't just create and publish content for the sake of doing so. Ensure intranet content is updated purposefully and that your team collectively understands what triggers new content creation. Is content always posted to announce recent happenings in the business or organization? What other events or activities trigger new content creation and publishing? What necessitates publishing one type of content over another?

Intranets that post content only for the sake of posting tend to overwhelm employees; the sheer amount of content makes it hard to know what is deserving of their attention.

Delivering great content requires investing in user research, strategic planning, meaningful metadata, web writing skills, and editorial oversight. It requires people and time to get it right, which isn't always easy. When we cut corners or fail to think about what necessitates new intranet content, we start running into the problem of quantity over quality. When we post haphazardly or too often just to get more content out there, we start to see the quality of intranet content diminish.

Many of the organizations we studied posted intranet content, such as news, weekly, while other areas of the intranet, such as benefits and other mainstay content, less frequently, sometimes on an annual basis. For every content piece and type, establish a logical cadence for when to publish and determine how long it will live on the intranet.

Factors to consider when naming documents or pages include:

- **Clarity and concision:** Think about the keywords and phrases employees already use and will recognize when looking for a page or document and use those exact phrases in page and document names. It's best to listen for these clues and phrases in user research instead of relying on opinions and assumptions when naming pages and documents.
- **Uniqueness:** Ensure page titles and link names are understandable and mutually exclusive. It's just as bad to have duplicate or redundant content on an intranet as it is to have incoherent links, page, and document names.
- **Plain language:** Avoid obscure or ambiguous language. Just because a word or phrase makes sense to the content manager or publisher doesn't mean it will make sense to employees. Use **plain language** and words that will resonate most with your users.

### Plain language

**Definitions, Principles, and Methods**

Plain language is communication your audience can understand the first time they read or hear it.

Obscure or redundant page names also increase task times as employees take longer to find what they need or may be confused between two similarly named pages or documents. Additionally, when content publishers or admins go to update or retire a piece of content if it's not named correctly in the first place, it's much more difficult to find and takes longer to update or remove from the intranet.

## Establish and uphold standards for intranet content.

**Process and Strategic Considerations**

Every organization has different goals and standards for its intranet content. As a starting point, the following are good things to outline in your content standards:

- Writing goals (Why are you writing or creating content in the first place?)
- Accessibility standards
- Processes for adding pages to the intranet's information architecture and navigation
- Naming conventions for pages and documents

Writing guidelines for:

- Voice and tone
- Headings and subheadings
- Link and button labels
- Metadata
- Grammar and style attributes:
- Abbreviations, acronyms, and initialisms
- Active voice
- Bulleted and numbered lists
- Bolding
- Capitalization (sentence case versus title case)
- Chunking
- Contractions
- Dates
- Language versions, translations, and localizations (for example, American English versus British English)
- Numbers
- Pronouns
- Structuring tools (pagination, accordions, anchor links, etc.)
- Time, etc.

Documenting and sharing content standards directly on the intranet is usually the best approach, especially if the organization follows a distributed content-management model.

Whether they're a creator, contributor, or a consumer of intranet content, this ensures employees always have a single location where they can find the most updated information about intranet content standards. When content consumers know the standards, they're better equipped to report any issues they see to content owners.

For example, at Eyeo GmbH, we observed a product owner who recently switched to a new team. The intranet was also very new to the organization, so he was working on setting up new pages in his team's area of the intranet. He didn't follow any specific naming convention or use sentence or title case when naming the pages. As a result, the pages showed up inconsistently in the left navigation of the space.

**Use sentence or title case consistently.**

Timeless Design Tips

With sentence case, only the first letter of a page name, headline, or link label is capitalized. With title case, the first letter of each word in a phrase is capitalized. There isn't conclusive evidence that proves one approach to be better than the other.

What's important is to choose one style and apply it consistently throughout the intranet.

In another example, a content manager at the Mayo Clinic was working on updating broken page links on its intranet when he received an email from a colleague with a request. Upon receiving it, he said:

> "It's helpful to be able to search for something in the WordPress media library, but if you don't have documents named the same way as the page on the intranet, it doesn't help. When setting up new pages, I don't always know what to call links because I get documents from so many different people. I try to have them save their documents as the page name for the intranet, but that doesn't always work. Getting it right from the start is helpful rather than the document name being different than the page name."

He continued to work on updating the broken links and grew frustrated at the inability to find the page the requestor wanted updated. He begrudgingly said:

> "Every time I go to update something, be it the page title or document name, it is so hard to find. Setting the naming conventions up right from the beginning is really helpful. I'm trying to do more of that in our transition, but there are lots of documents and things that came before me to clean up. I've found we need some education first; people need a better grasp on who does what and documenting how to name things."

Burns & McDonnell encountered similar challenges with naming content pieces, documents, and pages in its content management processes. One of the team members said:

"When people are putting information out there, we often wonder, what should we call it? We try to use acronyms as well as full names and alternative terms throughout the content. We often wonder how to refer to projects we're showcasing on the intranet; do we use the internal term or the city it's in? The same project could be labeled very differently across the intranet. We're not consistent with our naming conventions across the organization."

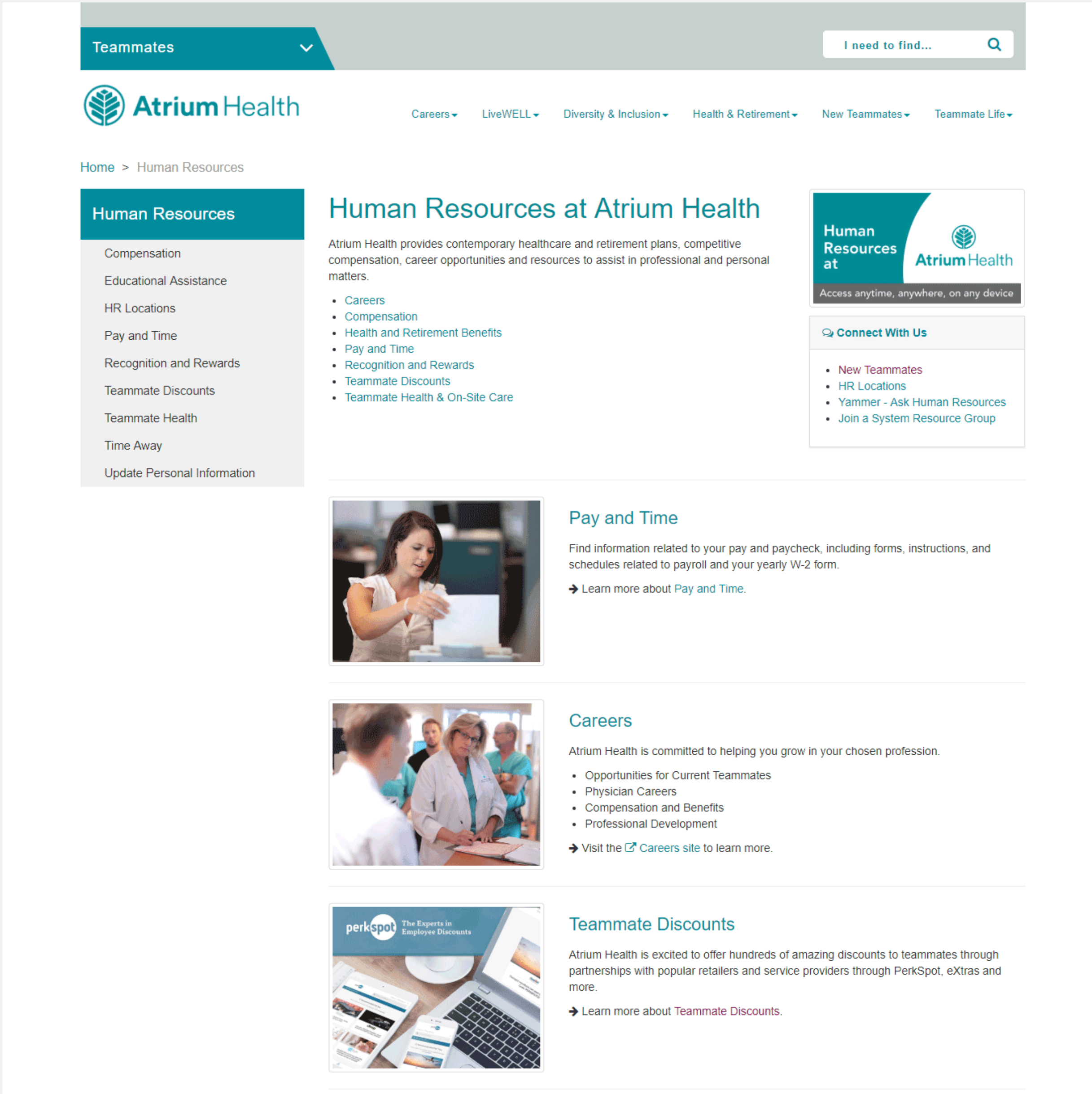
### Establish an owner or team of owners for every piece of intranet content.

Process and Strategic Considerations

An organization needs a person or people to be in charge of the intranet's content. These individuals should know what's out there and whether it's up to date, accurate, and still relevant. They should also know where content is following specified standards and where it's not and needs to be updated.

The person or people in charge of the intranet's content don't necessarily need to be solely responsible for all content creation, delivery, and governance, but they should act as an editor-in-chief of sorts for the intranet and be empowered to make content-related decisions.

On Atrium Health's intranet, pages and documents were named clearly and consistently. Specifically, within the Human Resources section, pages were named *Compensation*, *Educational Assistance*, *Pay and Time*, etc., which described exactly what content and topics users would find upon clicking. Additionally, Atrium Health chose to follow title case in naming its pages, links, and documents, and consistently applied this treatment across the intranet.




*Atrium Health's* Human Resources *section represents a good example of naming pages and documents clearly and consistently on an intranet. They used title case throughout and ensured page names communicated exactly what employees could find there.*

## 3. Ensure all pages have coherent and complete metadata.

It's important to make sure employees can find the content they need. Having coherent and complete metadata for every page helps employees do that, regardless of if they're seeking the content from the intranet's navigation or search engine. In its simplest form, metadata is data that describes and gives information about other data, in this case, content.

In many of the organizations we studied, employees struggled to find the content they needed because it lacked a clear page title and meta description — two of the most important pieces of metadata.

### Employees scan page titles and meta descriptions in intranet search results pages.

User Behaviors

A page title is important for two main reasons:

1. **It's often the first thing employees scan in search results pages** to determine whether or not the content on a given page will satisfy their information needs.
2. **Employees often have many browser tabs and windows open at the same time.** Because page titles appear at the top of browser tabs and windows, they are often relied upon as employees navigate between tabs or decide which to close versus which to leave open.

The meta description also works with the page title to communicate what the content page is about. It's usually around 155 characters and helps add context beyond what the page title conveys.

In our research, employees relied on these two metadata attributes the most to determine whether to click on a page and to assess if it would give them the information or answers they expected.

In some cases, we found metadata was an afterthought and poorly written or wasn't entered at all. This made for a bad search and navigation experience, as finding content on the intranet was difficult. As such, it's imperative for intranet content creators and publishers to understand basic search engine optimization practices to ensure content metadata is included.

Consider what keywords a user would type into the intranet's search field to find the content and include those keywords in the metadata. Keyword ideas can be found in intranet search logs or identified through user research such as interviews, observations, and by listening to the phrases used in the verbal feedback given during usability testing. Include the keyword phrases in the page title, the on-page headlines, the actual copy on the page, and in image alt tags and meta descriptions.

**Train content managers, admins, and publishers on how and where to enter metadata.**

**Process and Strategic Considerations**

As part of the training processes, make sure anyone posting content to the intranet knows how to write metadata properly, how to tag pieces of content, what attributes to include, and where to input all of it in the content management system. Content administrators may not always know what metadata attributes mean or where they ultimately appear in the interface. When they don't, it's too easy for them to skip this critical part of content management, and subsequently, employees will have a tough time finding the important pieces of content they need.

For example, while inputting a piece of content on the First Solar intranet, a content manager said, "Hmm, topic areas – I don't use those now, but maybe I should? That's something completely different, I think. I don't think I need those for this piece of content, and I'm not sure what those are, so I'm not going to include them."

## 4. Keep intranet content as concise as possible without sacrificing clarity or the key messages.

Employees don't want to read content that drags on and on. They want to get the information they need as quickly as possible, so they can return to doing their jobs. Being concise is all about getting straight to the point without leaving out key points or details. It's also about including the right *types* of details — the ones that employees need — rather than filling the page with useless filler copy.

One way to ensure concision in intranet content is to avoid using long, run-on sentences. In a conversation, you wouldn't want to go on and on about a topic without allowing the other person to get a word in edgewise. On the intranet, it's no different. The user interface facilitates a two-way conversation between the intranet and the user. As such, give employees a mental break while scanning intranet content. If there's a shorter way to say what you mean, use it! Here are other factors to keep in mind when it comes to being concise:

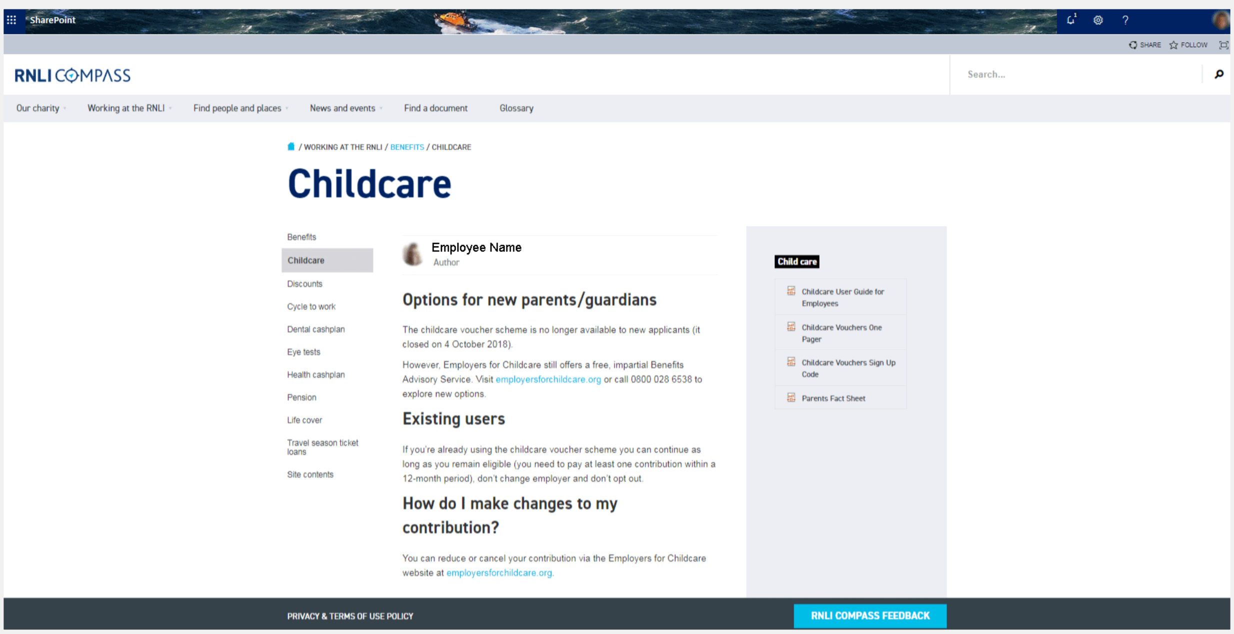
- What's the main point?
  - What do employees need to know?
  - What are the essentials?
- Keep sentences short and simple

- Avoid using extra adverbs and adjectives (really, very, great, rather, totally, actually, just, etc.)
- Remove introductory paragraphs containing in-depth details and context.

No one wants to read more than what's necessary, and no one likes to parse fluffy language that doesn't convey anything meaningful. One intranet team leader at Burns & McDonnell described their efforts to keep content clear and concise while working in a distributed model of content management:

> "The challenge for us is controlling the message. We support thousands of tools; most people don't write in a way people can understand; our goal is to make sure the content is consumable by our target audience. We understand it may create a delay in publishing, but I prefer the delay over publishing content no one can get value out of."

In another example, the Royal National Lifeboat Institution had concise content on its intranet and prioritized the information and details employees needed without leaving out key facts. Its page about *Childcare* was broken up into chunks, each with clear sub-headlines, which was favorable.




*The Royal National Lifeboat Institution included content on its intranet that was concise and to the point. Employees found this to be valuable when seeking answers to their questions.*

However, concision can be taken too far. On a few of the intranets we studied, some pages were simply too **shallow with content**.

### Shallow (or thin) content

**Definitions, Principles, and Methods**

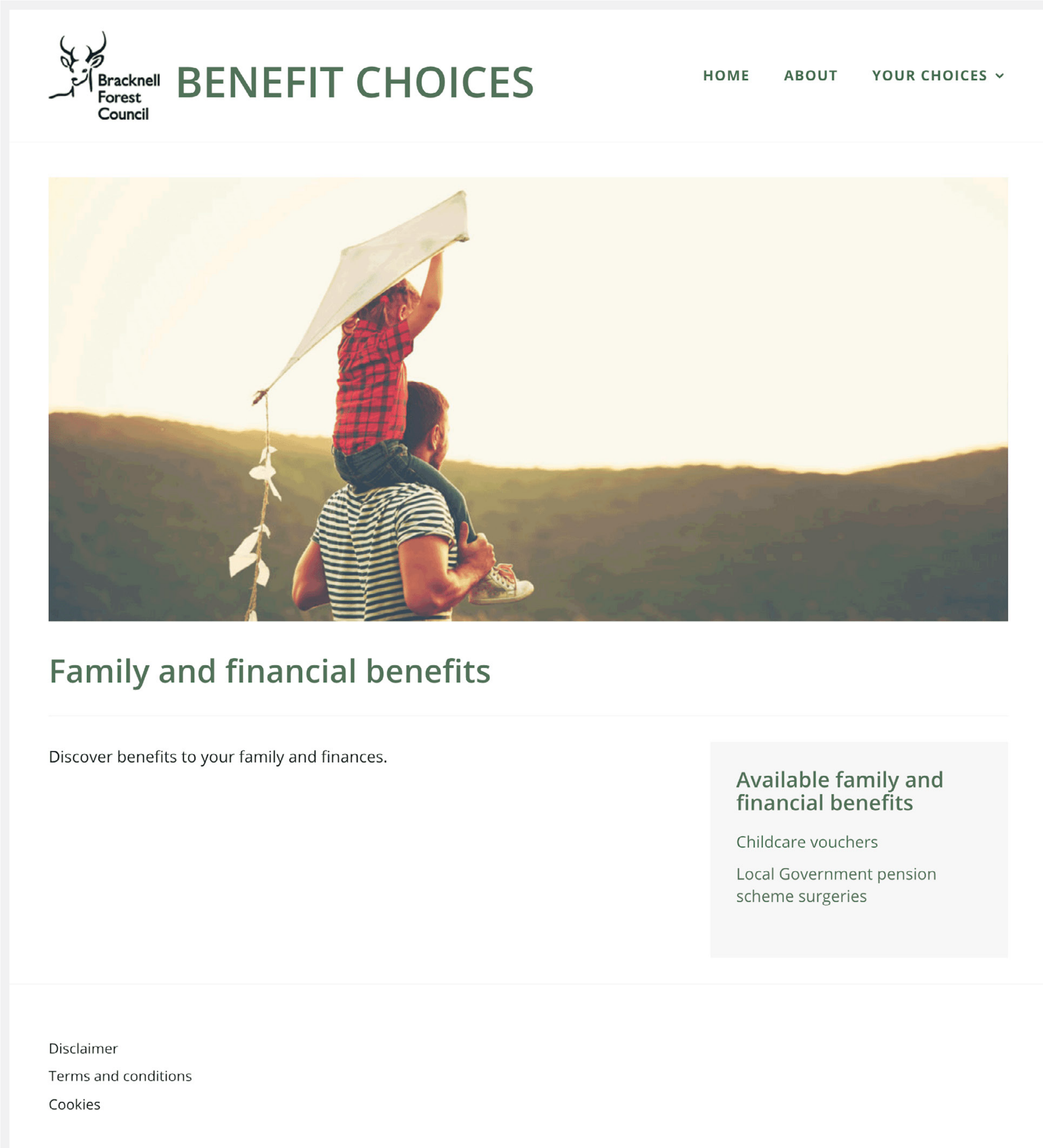
Shallow (or thin) content is pages that have little meaningful content or text on the page.

Often, this was accidental and occurred when content managers prematurely published pages before all of the content was complete or simply because there wasn't much content to include. In any case, look out for content pages that are too blank or concise to contain meaning for employees. Remember, users always have a goal in mind for why they've come to the intranet in the first place: to gather information, make a decision, get help, share relevant content with co-workers, and so on. But when the content they find has less detail than the level employees expect, their overall perception of the intranet will decrease.

For example, the content on Bracknell Forest Council's benefits website was *too* concise. Upon landing on the main page, employees found one simple sentence that said:

> Discover benefits to your family and finances.

The page provided a list of links for employees to access information about available family and financial benefits. However, this was too little content, particularly considering the space available on the page. A better approach would be to list some of the benefits and details about them right on this page rather than force users to click over to another set of pages.



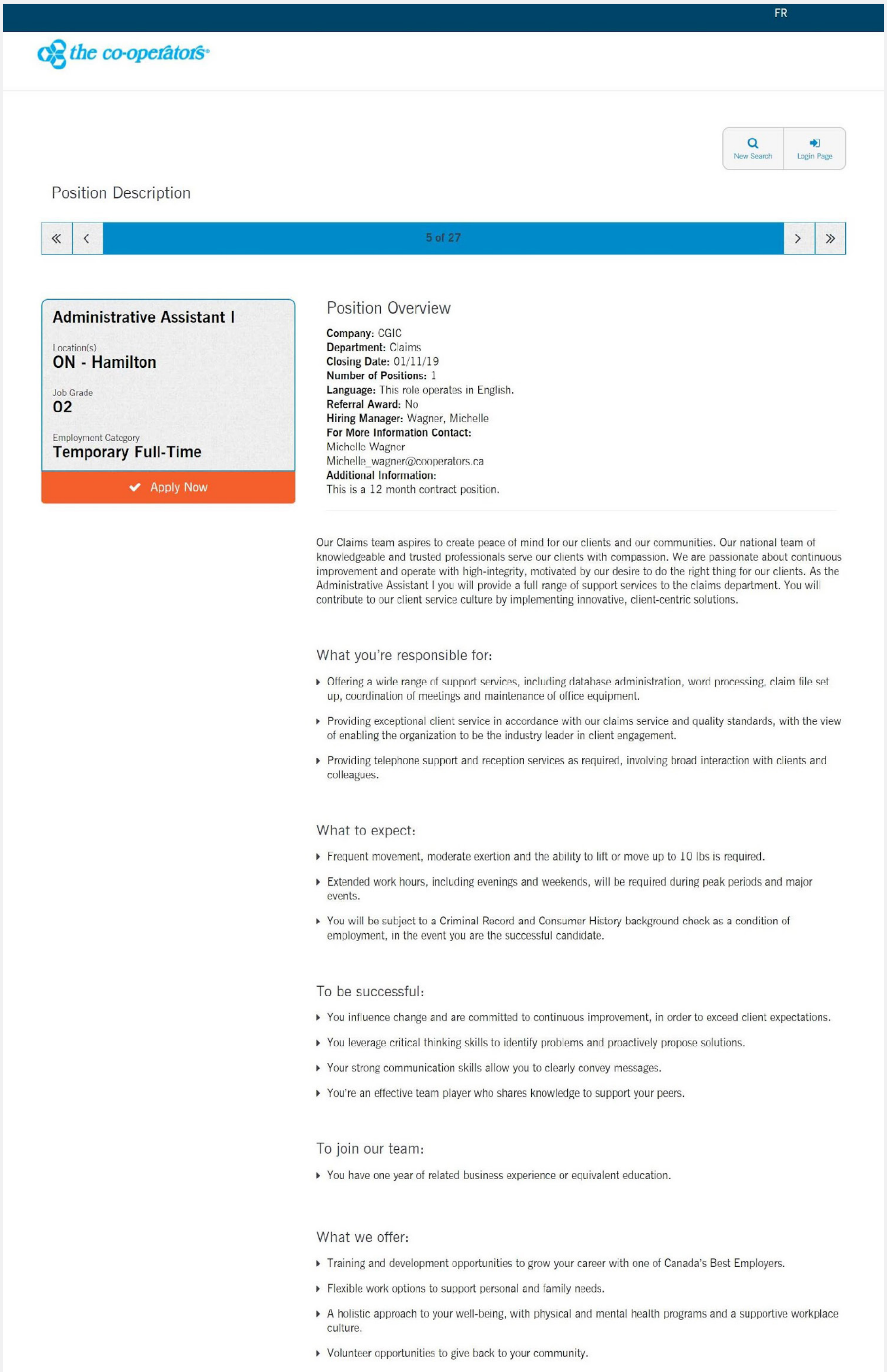

*Though it's important to be concise, this benefits page from Bracknell Forest Council represents an instance of being too concise. There's little meaningful content and details on the page, yet plenty of space.*

## 5. Include headlines and subheadings that reflect and summarize the content that follows.

Beyond just adding subheadings to copy, make sure the subheadings are clear and accurately describe the points made in the text that follows. Subheadings often act like a table of contents as users scan long pages. A descriptive subheading helps employees determine whether to spend time skimming and scanning what's below. Also, it signals to the reader whether or not that section will contain the answer they need. When subheadings aren't included or are unclear, it takes employees longer to find information.

For example, the subheadings on the Co-operator's intranet didn't always reflect the content they were meant to describe. In one task, users were looking for the level of education or experience required to be hired as an administrative assistant. Employees successfully found the job description and scrolled down the page, but they skipped over the subheading *To Join Our Team*, as it was not descriptive of the content below it: *having a year of related business experience*.

One user said, "The answer doesn't appear to be in the description. I would go ask the contact name given on this job." The cost of a bad headline or subheading can be quite high. I can involve multiple users' time spent researching and possibly applying when they don't have the proper experience level. It can also mean time spent by hiring managers (or HR) sifting through bad applications or resumes and the contact's (HR or hiring manager) time fielding questions. Including subheadings that clearly describe the content in the section can remedy this issue.


FR

the co-operators

New Search | Login Page

Position Description

5 of 27

**Administrative Assistant I**

Location(s)
**ON - Hamilton**

Job Grade
**02**

Employment Category
**Temporary Full-Time**

Apply Now

Position Overview

**Company:** CGIC
**Department:** Claims
**Closing Date:** 01/11/19
**Number of Positions:** 1
**Language:** This role operates in English.
**Referral Award:** No
**Hiring Manager:** Wagner, Michelle
**For More Information Contact:**
Michelle Wagner
Michelle_wagner@cooperators.ca
**Additional Information:**
This is a 12 month contract position.

Our Claims team aspires to create peace of mind for our clients and our communities. Our national team of knowledgeable and trusted professionals serve our clients with compassion. We are passionate about continuous improvement and operate with high-integrity, motivated by our desire to do the right thing for our clients. As the Administrative Assistant I you will provide a full range of support services to the claims department. You will contribute to our client service culture by implementing innovative, client-centric solutions.

What you're responsible for:

- Offering a wide range of support services, including database administration, word processing, claim file set up, coordination of meetings and maintenance of office equipment.
- Providing exceptional client service in accordance with our claims service and quality standards, with the view of enabling the organization to be the industry leader in client engagement.
- Providing telephone support and reception services as required, involving broad interaction with clients and colleagues.

What to expect:

- Frequent movement, moderate exertion and the ability to lift or move up to 10 lbs is required.
- Extended work hours, including evenings and weekends, will be required during peak periods and major events.
- You will be subject to a Criminal Record and Consumer History background check as a condition of employment, in the event you are the successful candidate.

To be successful:

- You influence change and are committed to continuous improvement, in order to exceed client expectations.
- You leverage critical thinking skills to identify problems and proactively propose solutions.
- Your strong communication skills allow you to clearly convey messages.
- You're an effective team player who shares knowledge to support your peers.

To join our team:

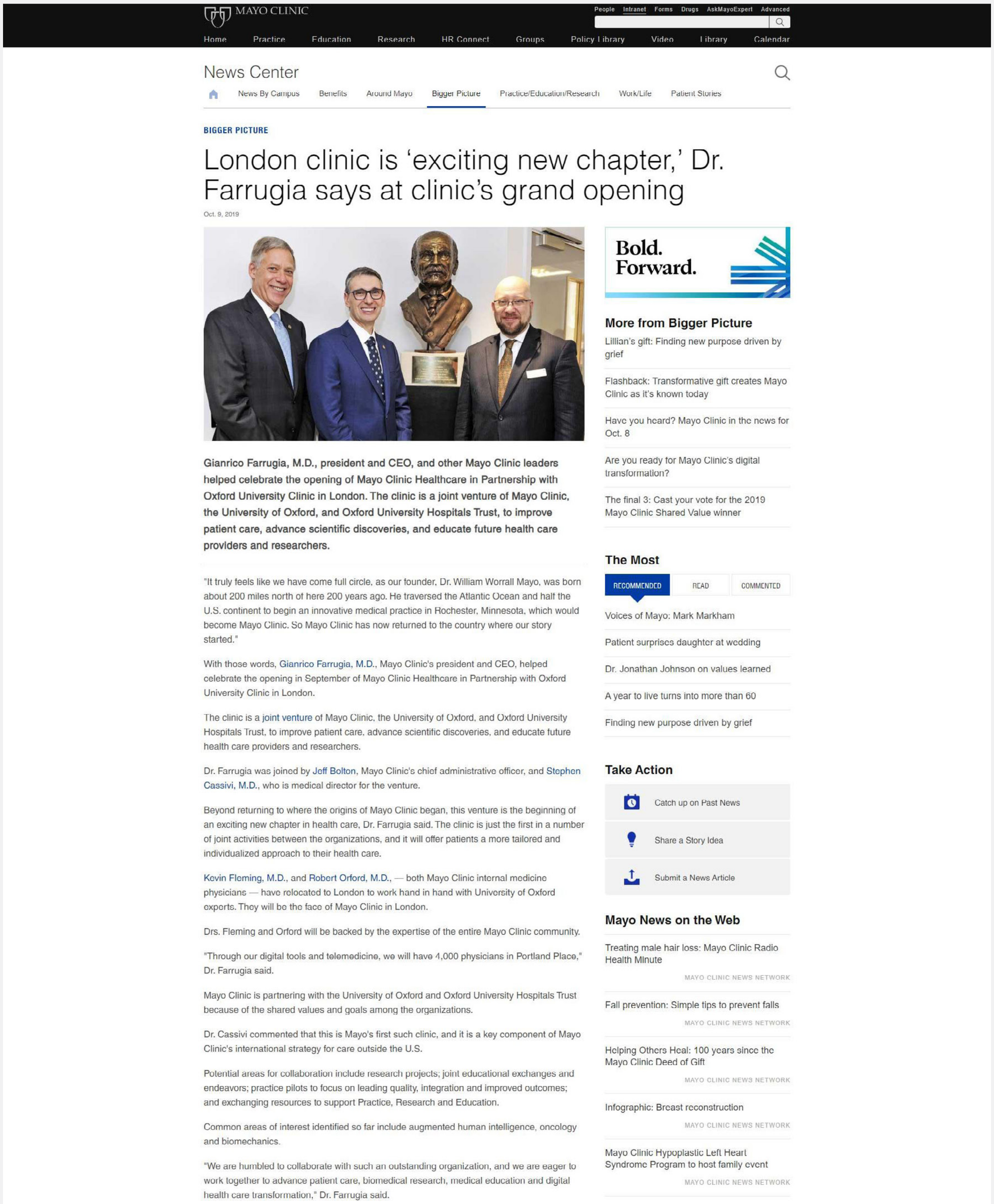
- You have one year of related business experience or equivalent education.

What we offer:

- Training and development opportunities to grow your career with one of Canada's Best Employers.
- Flexible work options to support personal and family needs.
- A holistic approach to your well-being, with physical and mental health programs and a supportive workplace culture.
- Volunteer opportunities to give back to your community.

*The subheading,* To join our team:, *did not summarize the content below as well as it could have. A better subheading would be* Level of experience.

At the Mayo Clinic, one employee described finding information within pages by saying, "Sometimes when there are a lot of words, you have to dig in to see what you have to see."



MAYO CLINIC

People Intranet Forms Drugs AskMayoExpert Advanced

Home Practice Education Research HR Connect Groups Policy Library Video Library Calendar

News Center

News By Campus Benefits Around Mayo Bigger Picture Practice/Education/Research Work/Life Patient Stories

BIGGER PICTURE

London clinic is 'exciting new chapter,' Dr. Farrugia says at clinic's grand opening

Oct. 9, 2019

**Gianrico Farrugia, M.D., president and CEO, and other Mayo Clinic leaders helped celebrate the opening of Mayo Clinic Healthcare in Partnership with Oxford University Clinic in London. The clinic is a joint venture of Mayo Clinic, the University of Oxford, and Oxford University Hospitals Trust, to improve patient care, advance scientific discoveries, and educate future health care providers and researchers.**

"It truly feels like we have come full circle, as our founder, Dr. William Worrall Mayo, was born about 200 miles north of here 200 years ago. He traversed the Atlantic Ocean and half the U.S. continent to begin an innovative medical practice in Rochester, Minnesota, which would become Mayo Clinic. So Mayo Clinic has now returned to the country where our story started."

With those words, Gianrico Farrugia, M.D., Mayo Clinic's president and CEO, helped celebrate the opening in September of Mayo Clinic Healthcare in Partnership with Oxford University Clinic in London.

The clinic is a joint venture of Mayo Clinic, the University of Oxford, and Oxford University Hospitals Trust, to improve patient care, advance scientific discoveries, and educate future health care providers and researchers.

Dr. Farrugia was joined by Jeff Bolton, Mayo Clinic's chief administrative officer, and Stephen Cassivi, M.D., who is medical director for the venture.

Beyond returning to where the origins of Mayo Clinic began, this venture is the beginning of an exciting new chapter in health care, Dr. Farrugia said. The clinic is just the first in a number of joint activities between the organizations, and it will offer patients a more tailored and individualized approach to their health care.

Kevin Fleming, M.D., and Robert Orford, M.D., — both Mayo Clinic internal medicine physicians — have relocated to London to work hand in hand with University of Oxford experts. They will be the face of Mayo Clinic in London.

Drs. Fleming and Orford will be backed by the expertise of the entire Mayo Clinic community.

"Through our digital tools and telemedicine, we will have 4,000 physicians in Portland Place," Dr. Farrugia said.

Mayo Clinic is partnering with the University of Oxford and Oxford University Hospitals Trust because of the shared values and goals among the organizations.

Dr. Cassivi commented that this is Mayo's first such clinic, and it is a key component of Mayo Clinic's international strategy for care outside the U.S.

Potential areas for collaboration include research projects; joint educational exchanges and endeavors; practice pilots to focus on leading quality, integration and improved outcomes; and exchanging resources to support Practice, Research and Education.

Common areas of interest identified so far include augmented human intelligence, oncology and biomechanics.

"We are humbled to collaborate with such an outstanding organization, and we are eager to work together to advance patient care, biomedical research, medical education and digital health care transformation," Dr. Farrugia said.

Bold. Forward.

**More from Bigger Picture**

Lillian's gift: Finding new purpose driven by grief

Flashback: Transformative gift creates Mayo Clinic as it's known today

Have you heard? Mayo Clinic in the news for Oct. 8

Are you ready for Mayo Clinic's digital transformation?

The final 3: Cast your vote for the 2019 Mayo Clinic Shared Value winner

**The Most**

RECOMMENDED READ COMMENTED

Voices of Mayo: Mark Markham

Patient surprises daughter at wedding

Dr. Jonathan Johnson on values learned

A year to live turns into more than 60

Finding new purpose driven by grief

**Take Action**

Catch up on Past News

Share a Story Idea

Submit a News Article

**Mayo News on the Web**

Treating male hair loss: Mayo Clinic Radio Health Minute

MAYO CLINIC NEWS NETWORK

Fall prevention: Simple tips to prevent falls

MAYO CLINIC NEWS NETWORK

Helping Others Heal: 100 years since the Mayo Clinic Deed of Gift

MAYO CLINIC NEWS NETWORK

Infographic: Breast reconstruction

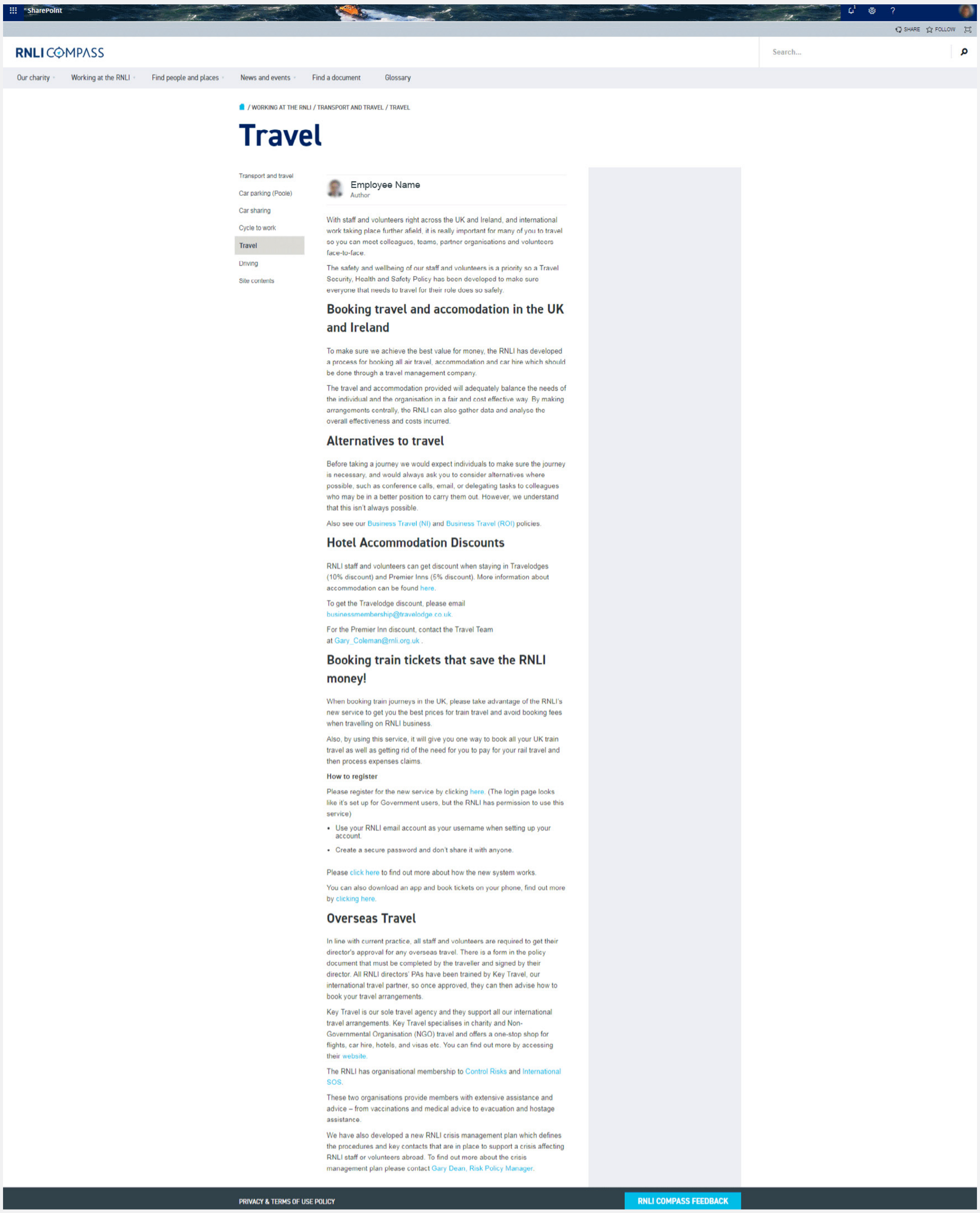
MAYO CLINIC NEWS NETWORK

Mayo Clinic Hypoplastic Left Heart Syndrome Program to host family event

MAYO CLINIC NEWS NETWORK

*A news article on the Mayo Clinic's intranet could be improved by adding clear subheadings that describe each section of the piece.*

The subheadings on the Royal National Lifeboat Institution's intranet were clear and descriptive of the content which appeared below. After scanning the subheading, employees' expectations were set, and they knew what they'd find in the content.




*The subheadings on the Royal National Lifeboat institution's intranet are a good example of including proper subheadings that are clear and descriptive.*

## 6. Organize and present similar content on a single page rather than on multiple, shallow pages.

Rather than distributing content across several pages, try to group similar topics and subjects into clear and concise paragraphs and present them on a single page whenever possible. This will help employees discover all the information related to a given topic from one page instead of having to click across several different pages.

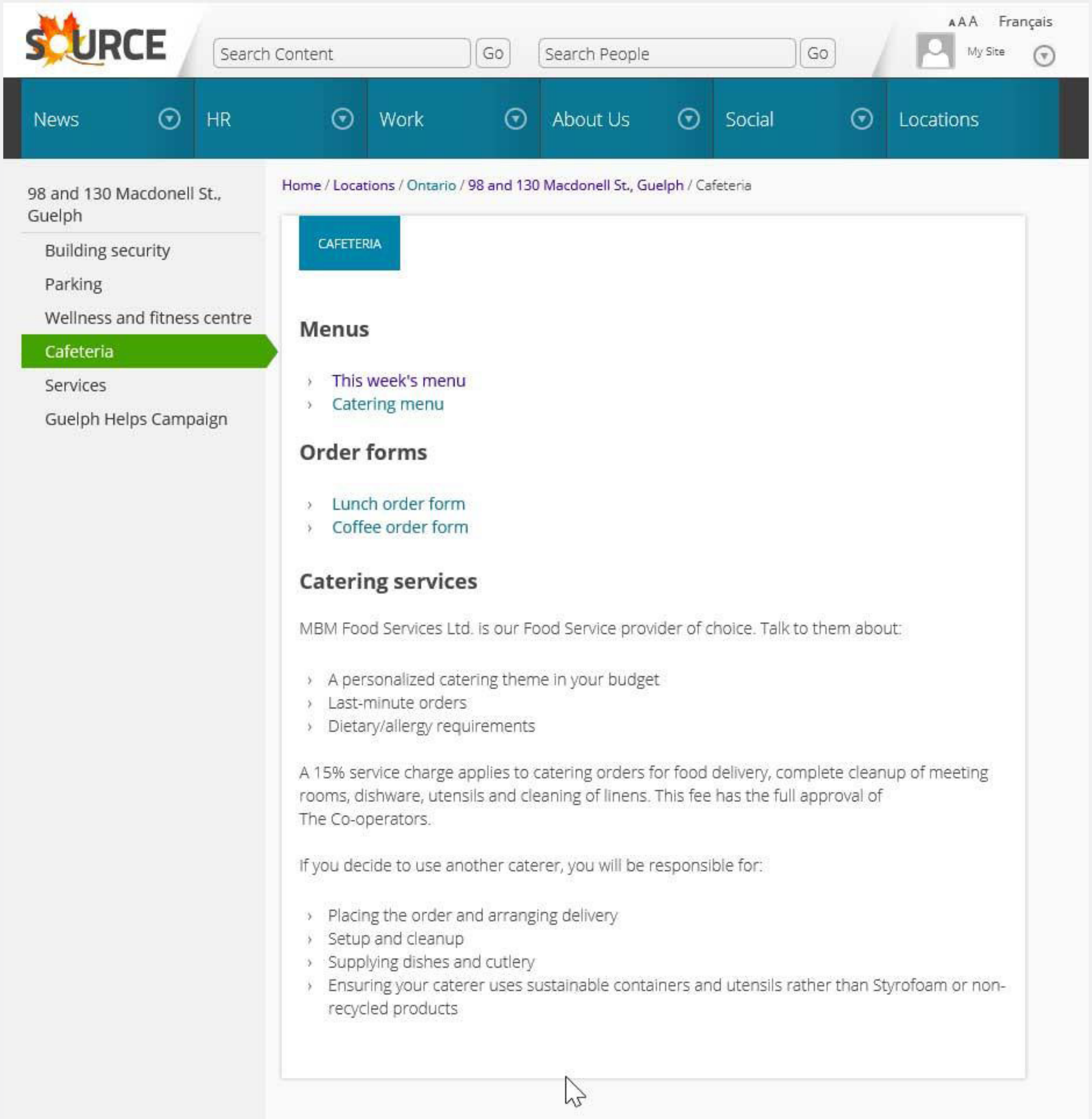
Additionally, when organizing and structuring content, strive to break up each paragraph of copy into **chunks**, with ample whitespace in between, to denote the separation of ideas or sub-topics. This will also help to make content and copy easier for employees to skim and scan.

### Chunks (or chunking)

**Definitions, Principles, and Methods**

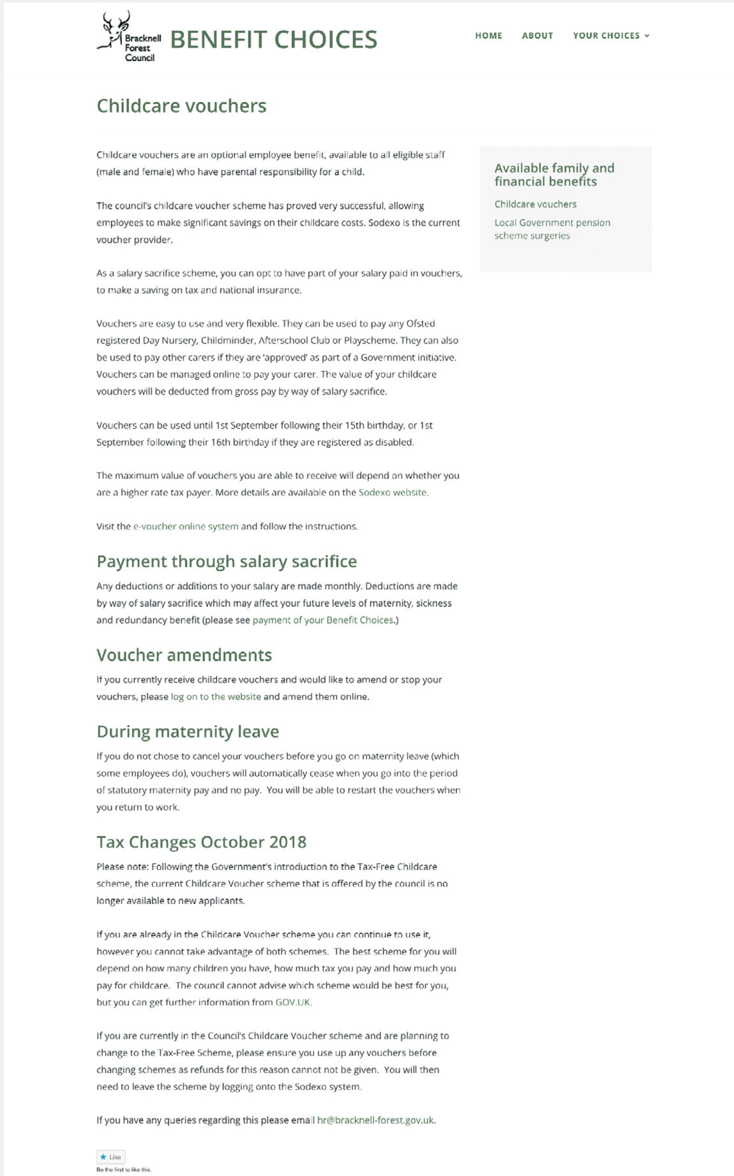
Chunking refers to breaking up content into small, distinct information units instead of presenting an undifferentiated mess of copy. Use whitespace in between each chunk to denote separation between paragraphs or ideas.

For example, on The Co-operator's intranet, information about cafeteria price changes was highly discoverable because it was placed within the cafeteria menu. Two employees noticed the information about price changes, and one user remarked, "Oh, that's good to know." When possible, place related content together, increasing the likelihood that users will discover it.




*The Co-operators did a nice job grouping similar content and presenting it all on the same page. The team also effectively chunked the information, so employees saw an organized and structured page rather than a mess of copy.*

Bracknell Forest Council also did a great job grouping like-information and presenting it on a single page on its benefit choices website. A page about childcare benefits outlined how parents could cover the costs of such benefits and when to begin the coverage. Having all of this information on one page meant employees didn't have to click around to multiple separate pages to find what they needed.


Bracknell Forest Council BENEFIT CHOICES

HOME ABOUT YOUR CHOICES

Childcare vouchers

Childcare vouchers are an optional employee benefit, available to all eligible staff (male and female) who have parental responsibility for a child.

The council's childcare voucher scheme has proved very successful, allowing employees to make significant savings on their childcare costs. Sodexo is the current voucher provider.

As a salary sacrifice scheme, you can opt to have part of your salary paid in vouchers, to make a saving on tax and national insurance.

Vouchers are easy to use and very flexible. They can be used to pay any Ofsted registered Day Nursery, Childminder, Afterschool Club or Playscheme. They can also be used to pay other carers if they are 'approved' as part of a Government initiative. Vouchers can be managed online to pay your carer. The value of your childcare vouchers will be deducted from gross pay by way of salary sacrifice.

Vouchers can be used until 1st September following their 15th birthday, or 1st September following their 16th birthday if they are registered as disabled.

The maximum value of vouchers you are able to receive will depend on whether you are a higher rate tax payer. More details are available on the Sodexo website.

Visit the e-voucher online system and follow the instructions.

Payment through salary sacrifice

Any deductions or additions to your salary are made monthly. Deductions are made by way of salary sacrifice which may affect your future levels of maternity, sickness and redundancy benefit (please see payment of your Benefit Choices.)

Voucher amendments

If you currently receive childcare vouchers and would like to amend or stop your vouchers, please log on to the website and amend them online.

During maternity leave

If you do not chose to cancel your vouchers before you go on maternity leave (which some employees do), vouchers will automatically cease when you go into the period of statutory maternity pay and no pay. You will be able to restart the vouchers when you return to work.

Tax Changes October 2018

Please note: Following the Government's introduction to the Tax-Free Childcare scheme, the current Childcare Voucher scheme that is offered by the council is no longer available to new applicants.

If you are already in the Childcare Voucher scheme you can continue to use it, however you cannot take advantage of both schemes. The best scheme for you will depend on how many children you have, how much tax you pay and how much you pay for childcare. The council cannot advise which scheme would be best for you, but you can get further information from GOV.UK.

If you are currently in the Council's Childcare Voucher scheme and are planning to change to the Tax-Free Scheme, please ensure you use up any vouchers before changing schemes as refunds for this reason cannot not be given. You will then need to leave the scheme by logging onto the Sodexo system.

If you have any queries regarding this please email hr@bracknell-forest.gov.uk.

Like

Be the first to like this.

Available family and financial benefits

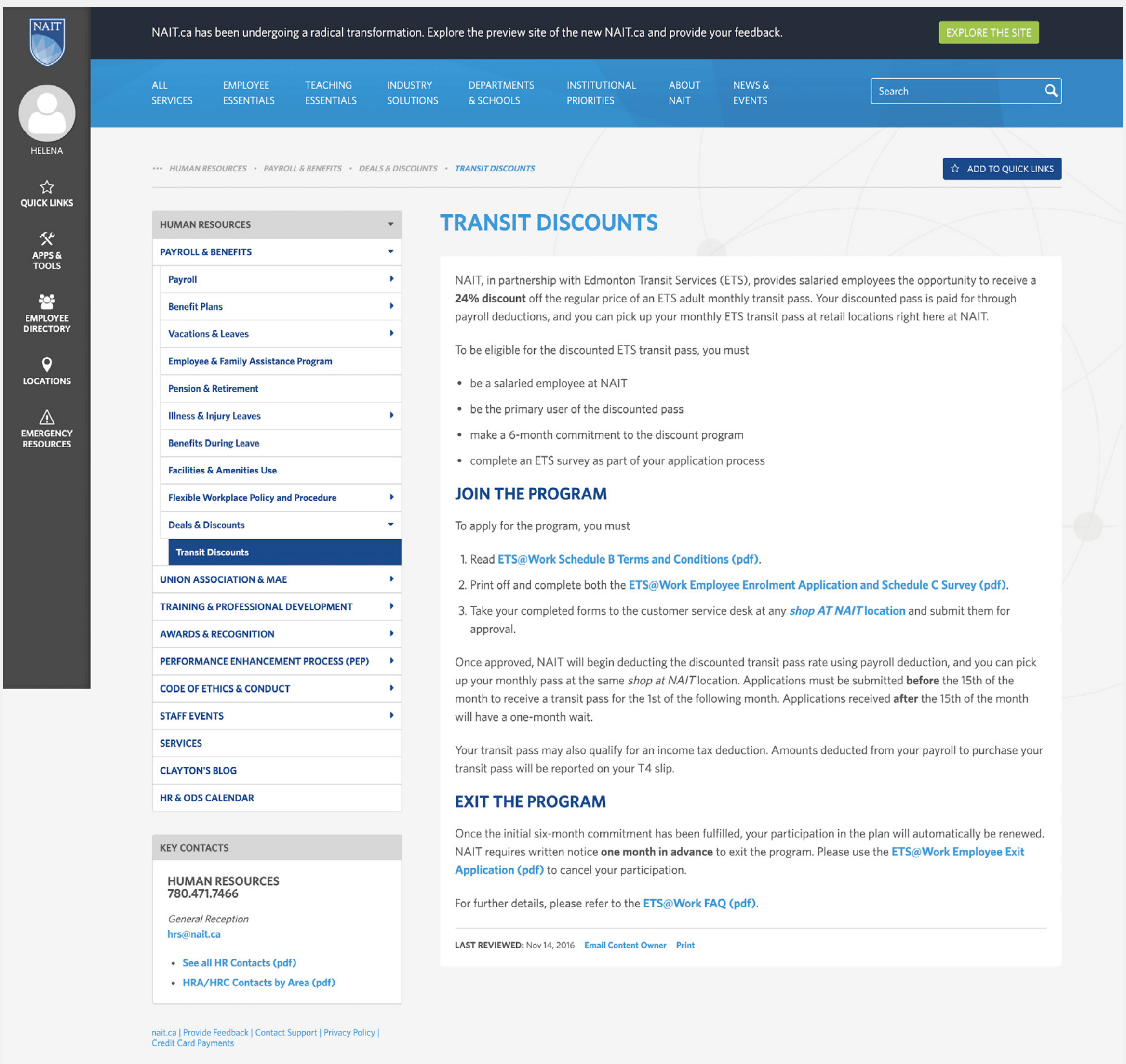
Childcare vouchers

Local Government pension scheme surgeries

*Bracknell Forest Council did a nice job of grouping similar content on a single page on its intranet and breaking each paragraph into easily digestible information units with ample whitespace between them.*

## 7. Include bulleted or numbered lists where appropriate.

Using bulleted or numbered lists can help draw attention to important information employees need. Formatting content this way can also drive efficiency, as users can quickly scan the list to find the most important information. For example, The Northern Alberta Institute of Technology used bulleted and numbered lists effectively across its intranet. Employees could quickly scan each headline on the transit discounts page to understand the copy underneath. Additionally, information conducive to being presented as a bulleted list, such as eligibility criteria for how to get a discounted transit pass, was displayed as such. This way, employees didn't have to wade through dense paragraphs of copy to understand what to do to qualify.




*The Northern Alberta Institute of Technology effectively used bulleted and numbered lists within its content. This formatting helped users skim and scan the content with speed and ease.*

## 8. When bulleted lists are long, progressively disclose information as the user needs it.

Don't inundate employees with all possible information. **Progressively disclose** information as employees may need it.

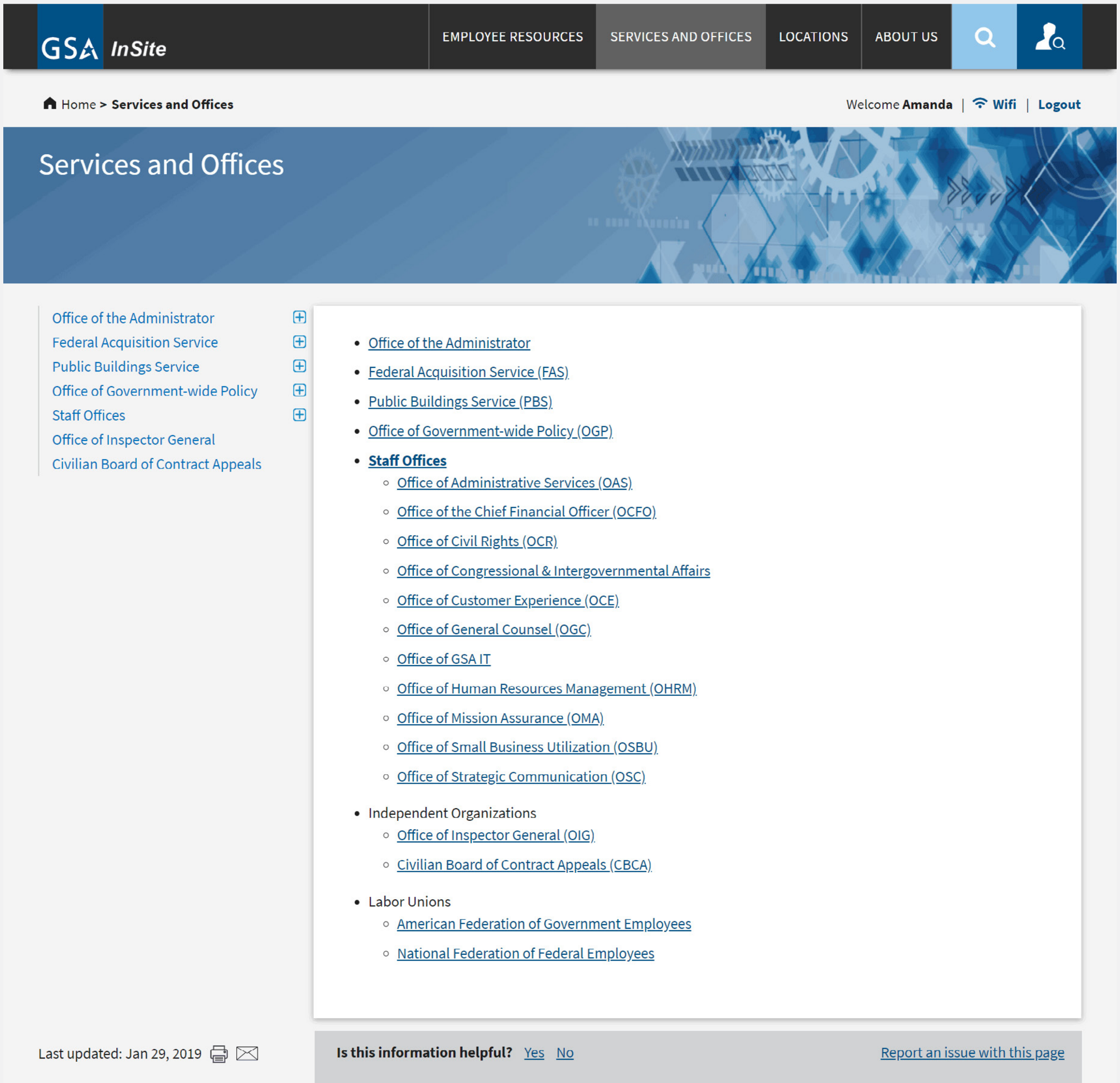
### Progressive disclosure

Definitions, Principles, and Methods

**Progressive disclosure** defers advanced or rarely used features to a secondary screen, making applications easier to learn and less error prone.

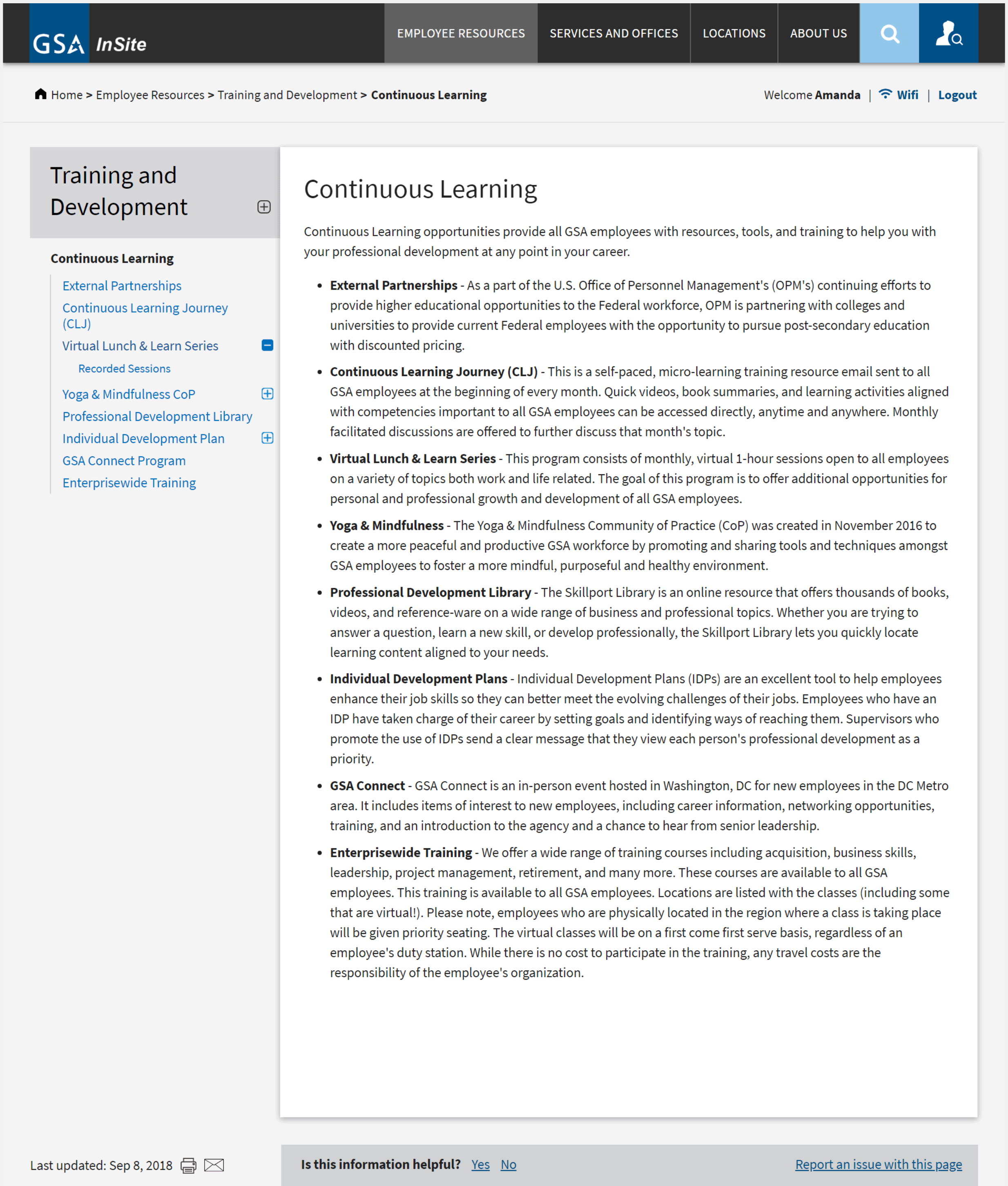
In our studies, we observed intranets that abused the use of bulleted and numbered lists. Instead of using bulleted lists to summarize key facts and information in context, some intranets simply presented a bulleted list of links with no context aside from a link label. This isn't a good practice because employees often need more information to understand what a bulleted list of links represents and which link to select.

For example, on the General Services Administration's intranet, a page outlining *Services and Offices* contained only a bulleted list of links. A better approach here would be to include a short, concise paragraph of copy for each office, presumably with a bulleted list of services they each offer. Subsequently, a link over to the services' respective area of the intranet would nicely round out each section and give users the additional context they need to feel confident about selecting a given link.



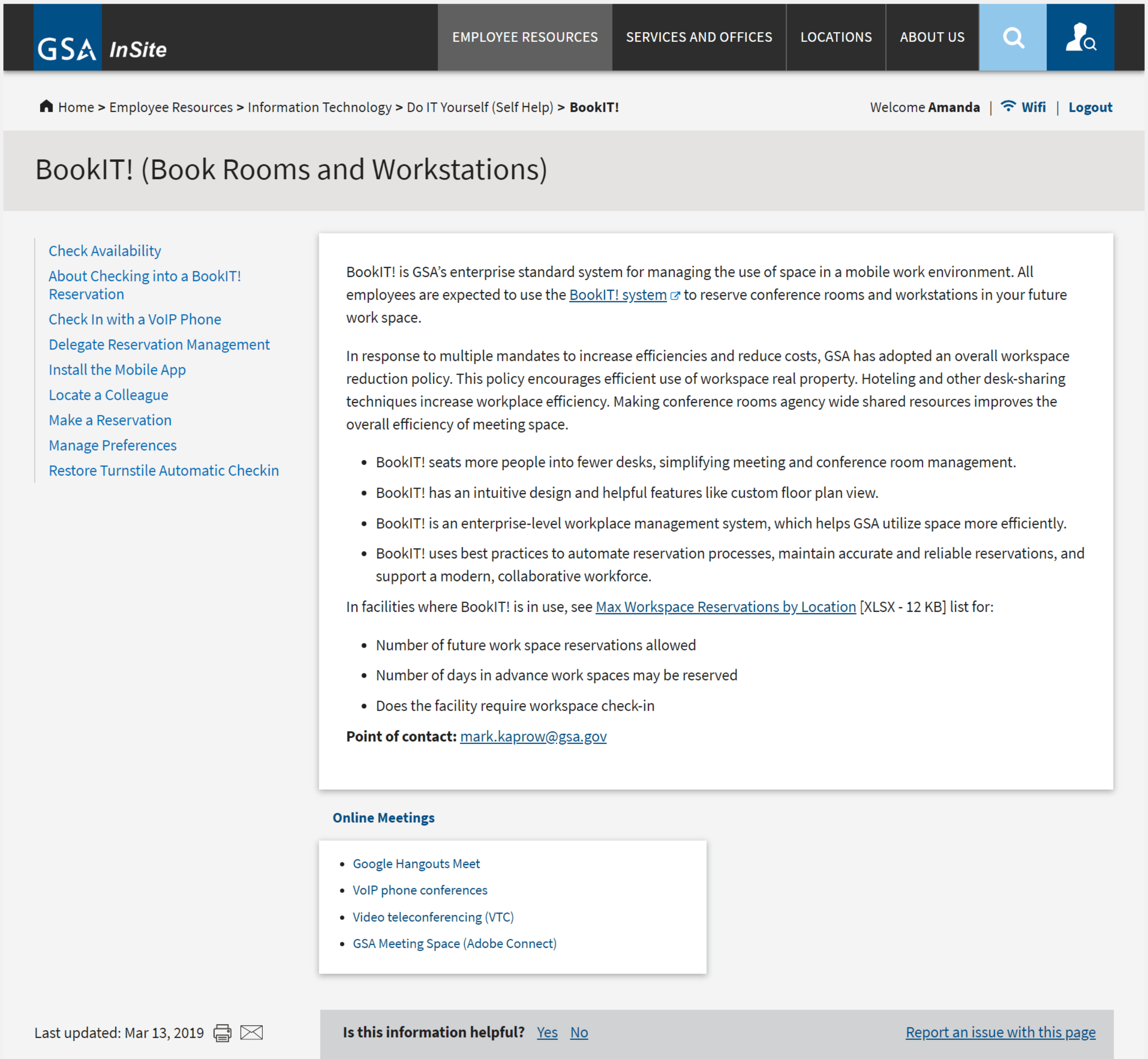

*Rather than using a bulleted list to present each office, a bulleted list could outline specific services each GSA office offers.*

Another common misuse of bulleted and numbered lists happens when content creators or publishers break up what would otherwise be perfectly intact paragraphs of copy with unnecessary bulleted lists. For example, on the General Services Administration's intranet, the content on a page about *Continuous Learning* bulleted out each type of learning opportunity offered to employees. Rather than using bullets here, a better approach would be to provide a clear and concise subheading for each type of learning and follow each subheading with a paragraph of copy underneath. Sub-topics related to a type of learning could be displayed as a bulleted list, or any steps an employee needs to take to enroll in a particular type of learning would work well as a numbered list.




*This page on the General Services Administration's intranet represents a less-than-optimal use of bullets. Rather than using bullets here, each learning type could be pulled out as a meaningful subheading.*

Favorable examples of using bulleted lists could also be found on The General Services Administration's intranet, specifically on its *BookIT!* page. The page clearly outlined what this system does and used bulleted lists to call out and summarize key benefits and information about navigating some of the system's nuances.



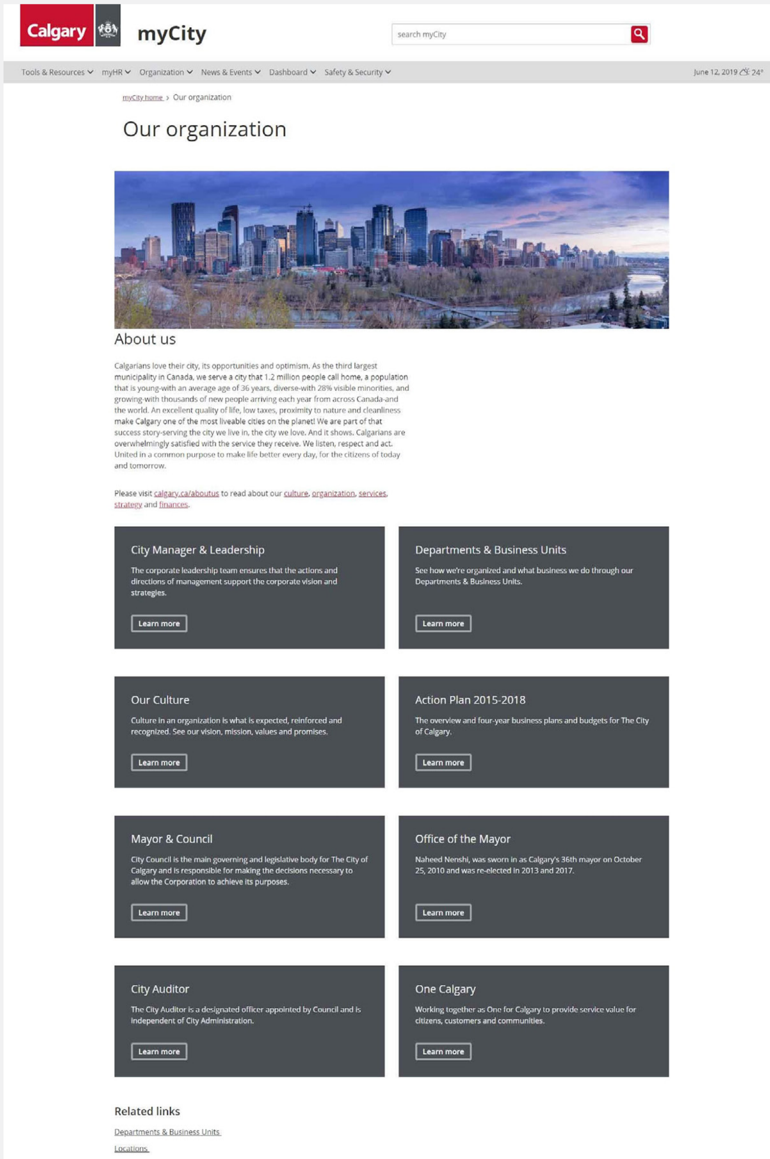

*The GSA's intranet also had favorable examples of using bulleted lists. It used bulleted lists to outline the benefits of the BookIT! system and describe how it works.*

## 9. Lead with information-carrying words in link and button labels; avoid using *Learn More* or *Click Here*.

Many intranets we studied relied on link text such as *Learn More* or *Click Here* to take employees to other parts of the site. Unfortunately, link text such as this is not as clear, meaningful, or helpful as it could be. When writing link and button labels, content creators should reinforce and reiterate where the user will go next in the text itself. Leading with information-carrying words, or words that carry immediate meaning, can help do just that.

When employees scan link text, it helps if that text is meaningful. When they read a link that says, *Learn More* or *Click Here*, they must also read the text around it to understand where the link leads. For people using screen readers and other assistive technologies, vague link labels detract from their experience and are far from accessible. Writing clear link and button labels improves everyone's experience. As much as possible, use task-based, information-carrying words for link names.

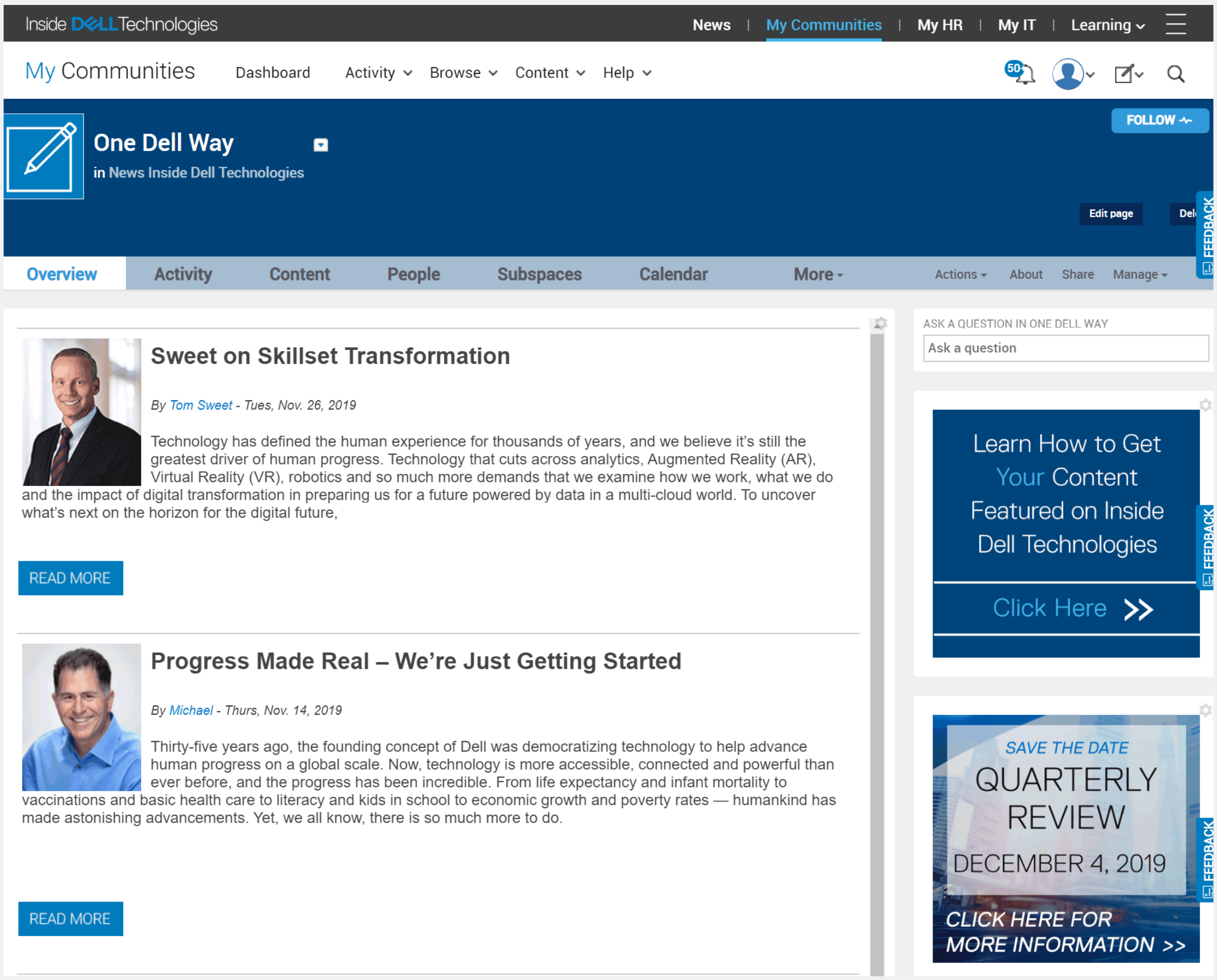
A page on the City of Calgary's intranet providing *About Us* content for the organization contained repetitive *Learn More* links. For these links that drove users into intranet sub-sections, a better approach would be to use link labels such as, *Meet the City Manager and Leadership* team rather than *Learn More*.




*Repetitive* Learn More *button labels appeared on the City of Calgary's intranet. A simple improvement to this content would be to write more descriptive link labels.*

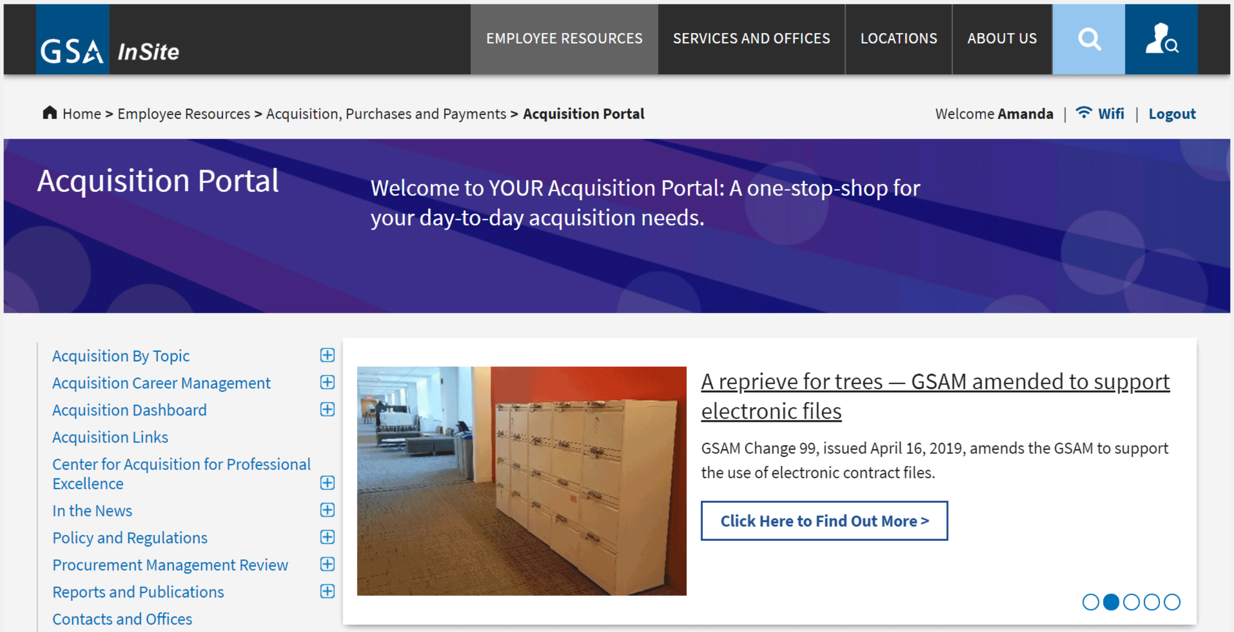
Just as problematic as *Learn More* and *Click Here* are link labels such as *Read More*. Though they insinuate that the user will be taken to a place where they can read more about a particular subject, a better link label would more thoroughly describe what the user will encounter after clicking.

In the *News* section on Dell's intranet, users could scan through a list of summaries, each of which described the longer news stories they represented. After each summary, a button labeled *Read More* appeared. A better, more descriptive link label for the first news article, *Sweet on Skillset Transformation*, would read, *Learn How Dell is Embracing Advances in Technology*. A banner ad in the right rail on this page also contained the call-to-action, *Click Here*. In this case, a better approach would be to remove the *Click Here* call-to-action and let the main phrase displayed in the ad, *Learn How to Get Your Content Featured on Inside Dell Technologies be* the main call-to-action.




*Dell's intranet had buttons labeled* Read More *and link text that said* Click Here *on the same page. An easy way to improve this content would be to write more descriptive link and button labels, leading with information-carrying words.*

On the GSA's intranet, a button on its *Acquisition Portal* page said, *Click Here to Find Out More*. This button label was not clear or descriptive of where the user would go next. In this case, a better approach would be to use a button label such as, *Understand How the GSAM Policy Change Affects Your Work*.




*A featured piece of content on the General Services Administration's intranet included a button labeled,* Click Here to Find Out More. *A better approach would be to use button label text that more clearly sets up an action-oriented context for where the user will go next.*

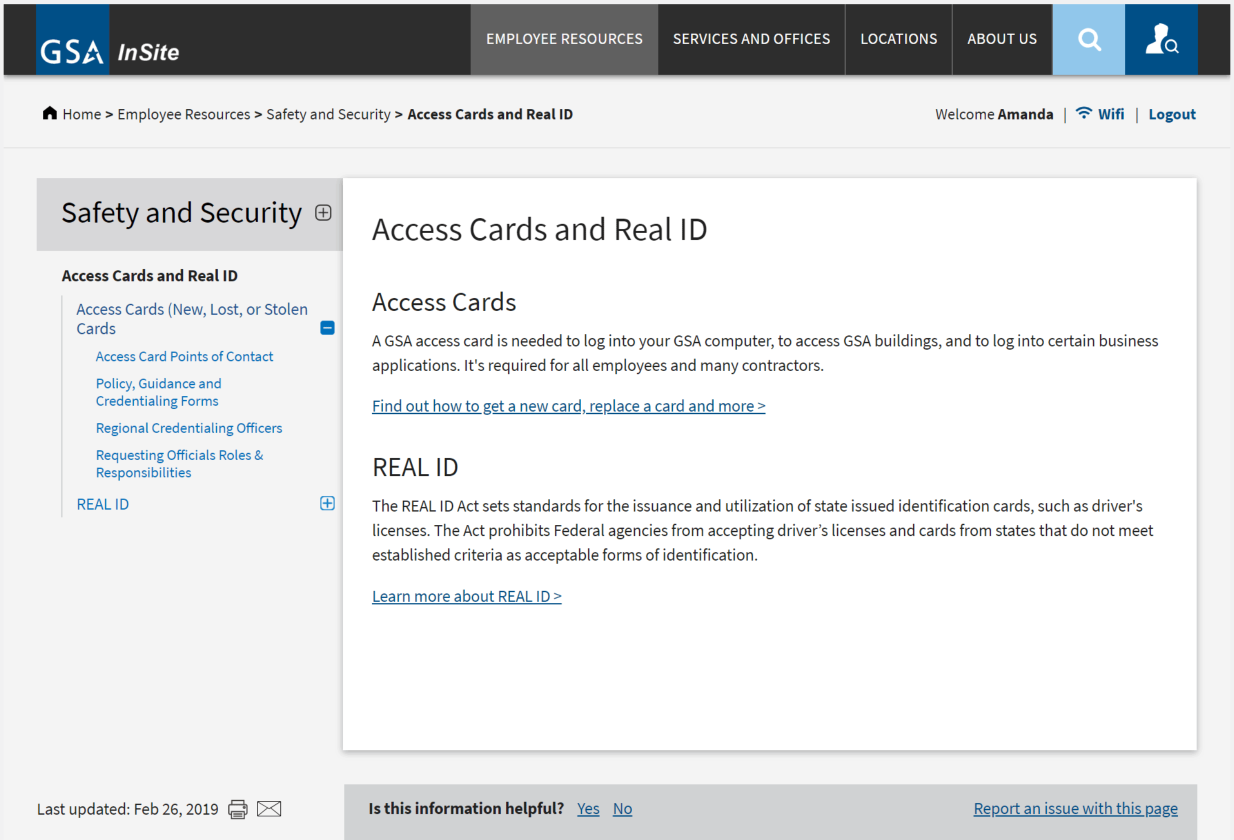
In a better example on the same intranet, the GSA used clearer link labels on its *Access Cards and Real ID* page. For the *Access Cards* section, a concise sentence explained what an access card is and what it's used for. A descriptive link label then appeared right underneath and said:

> Find out how to get a new card, replace a card, and more

Though the link label in the *Real ID* section included the phrase, *Learn More*, it did a better job of qualifying what the user would be learning more about:

> Learn more about REAL ID

This is an acceptable approach if there is no better way to sum up where the user will go upon click. Additionally, link text can be as long as it needs to be to effectively summarize where the user will go next.




*The General Services Administration did a much better job writing clear, actionable link text on its* Access Cards and Real ID *page.*

## Include guidelines for writing effective link and button labels in your content standards.

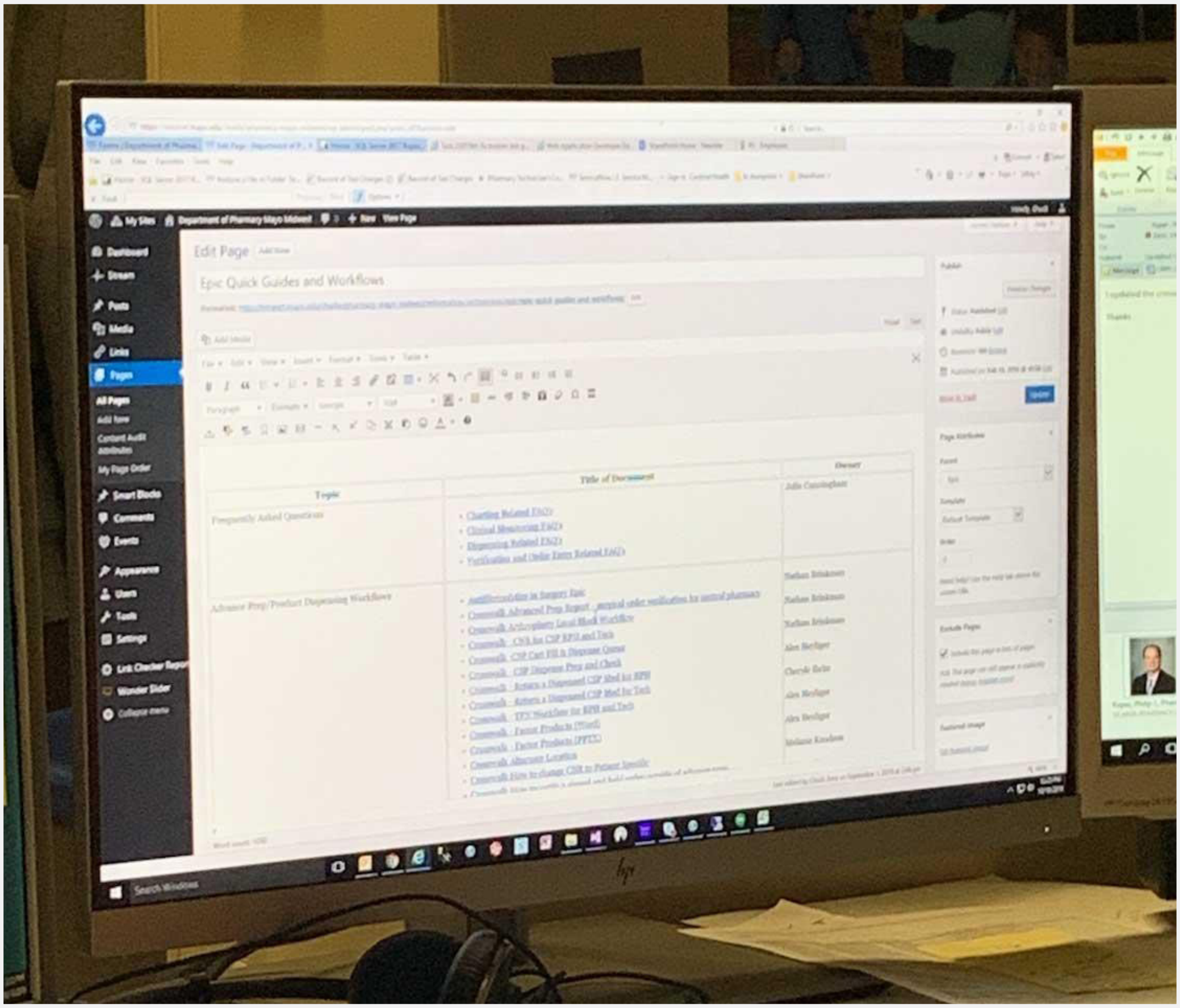
Process and Strategic Considerations

To ensure content creators and publishers avoid using *Learn More* or *Click Here* as link text or button labels, outline what proper link text looks like versus what is not acceptable in your content standards.

Additionally, train content creators and managers to go beyond these general link labels to write more descriptive links and buttons.

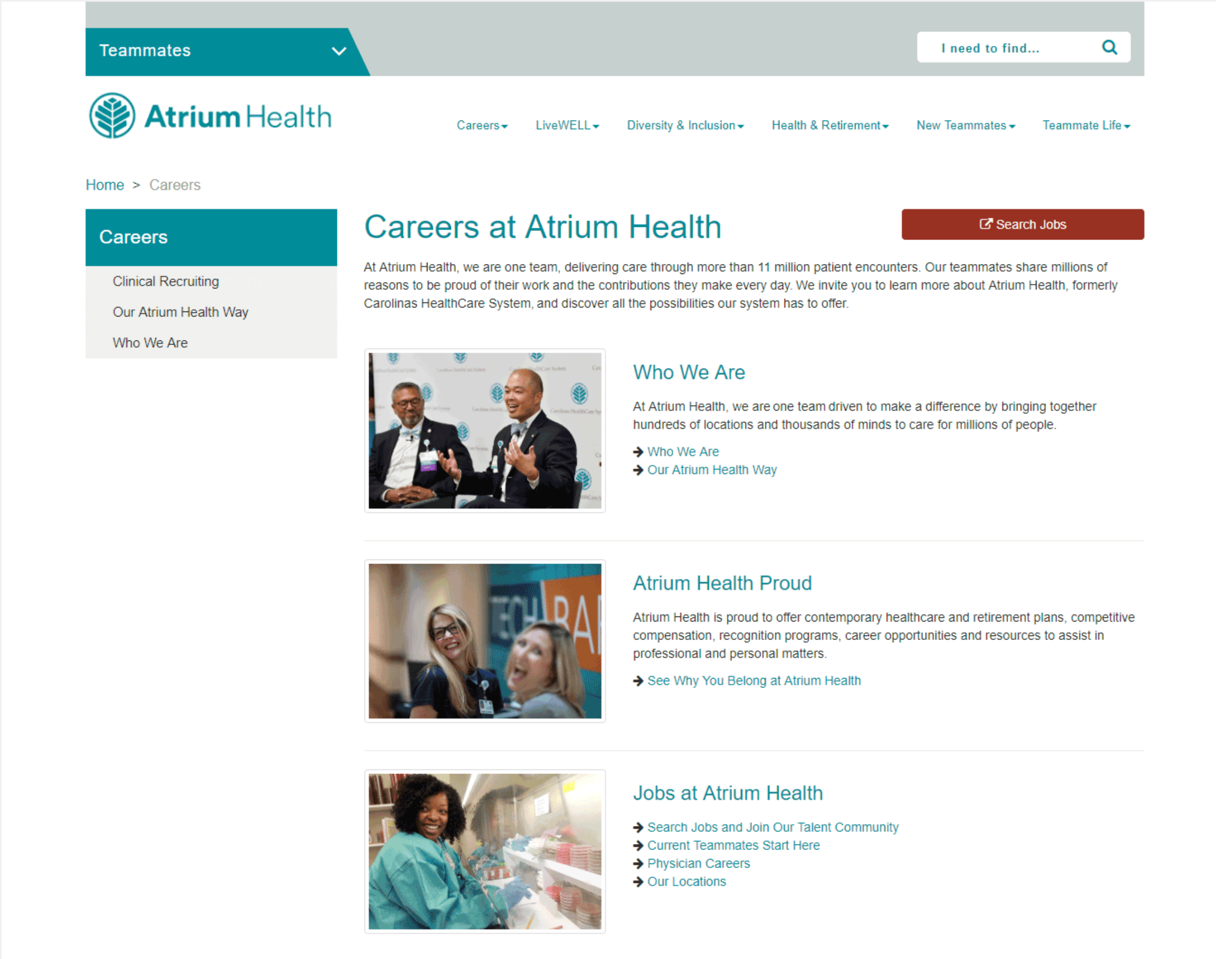
On the Mayo Clinic's intranet, users grew frustrated when they had to wade through massive amounts of information to find what they needed or got annoyed if they landed on a page that provided little value or context for the links that appeared. In these cases, people wondered what the page's point was. While observing a content manager update a content page, we noticed they were creating a list of links. Though the link names were more coherent than *Learn More* and

*Click Here,* each link began with the same word. When users see the same word repeated in a list of links, they'll skip over the repetitive word in search of information-carrying words that differ from the redundant word. As much as possible, avoid repeating the same word at the beginning of each link when they appear in a list. Strive to begin each link in the list with a unique and meaningful word or phrase.



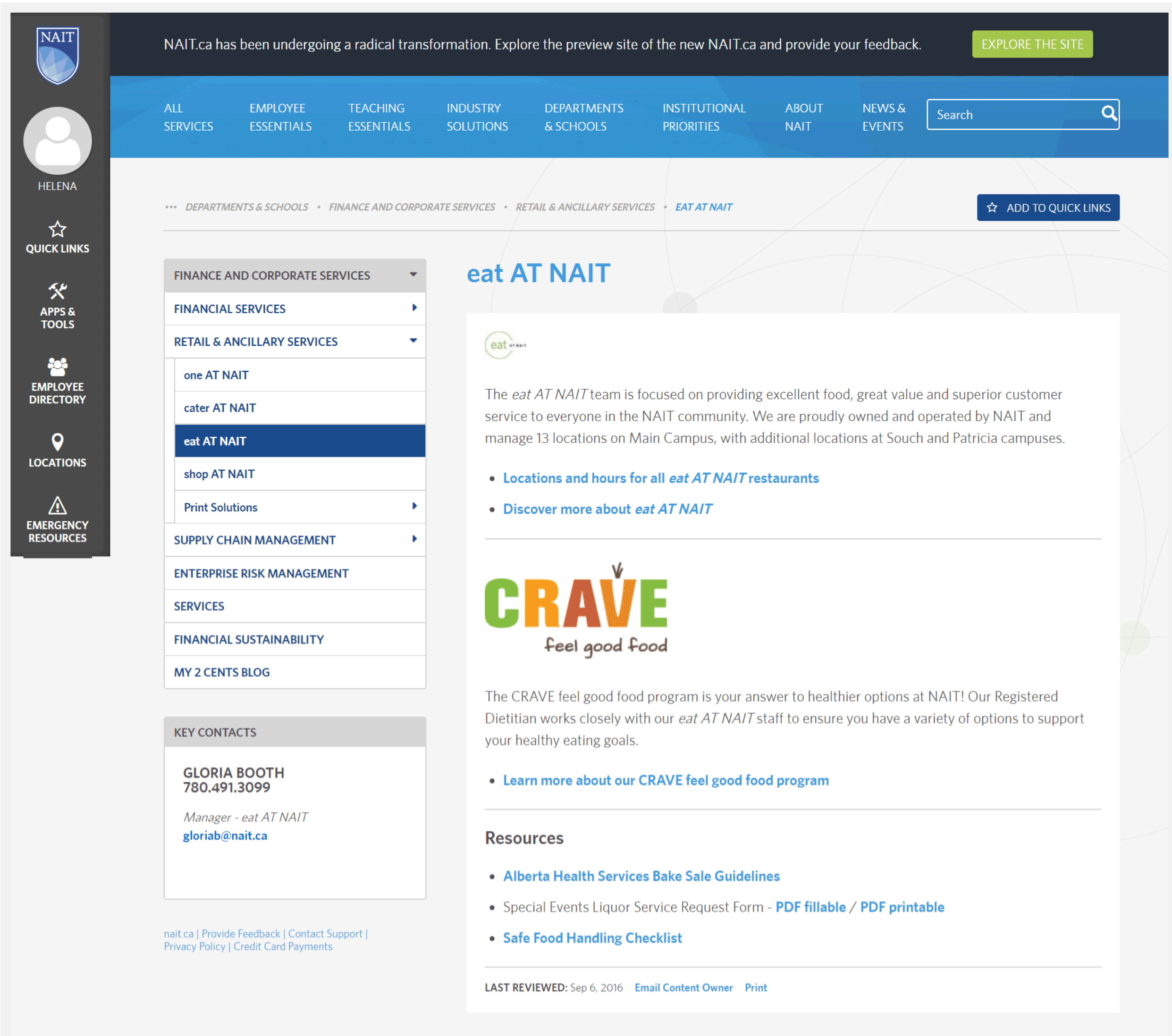

*While observing a content manager as they updated intranet content, we noticed they created a list of links that all began with the same word. Though the link text was more descriptive than* Learn More *or* Click Here, *a better approach would be to begin each new link with a unique word or phrase.*

Atrium Health's intranet content contained clear link text and button labels. On a page about Careers at Atrium Health, links such as, See Why You Belong at Atrium Health helped set user expectations, so they could confidently know that clicking a link would take them to a video.




*The link text,* See Why You Belong at Atrium Health, *and many others on this page are great examples of writing clear, descriptive link text that leverages information-carrying words.*

The Northern Alberta Institute of Technology also used favorable link text and button labels on its intranet. On the eat at NAIT page, employees could find everything they needed to know about where to get something to eat on campus. Link text such as Locations and hours for all eat at NAIT restaurants and Safe Food Handling Checklist perfectly set users' expectations for what they would find after clicking the link.




*The Northern Alberta Institute of Technology's food service page represented a good example of writing clear link text using information-carrying words.*

## 10. Bold keywords and phrases to draw users' attention.

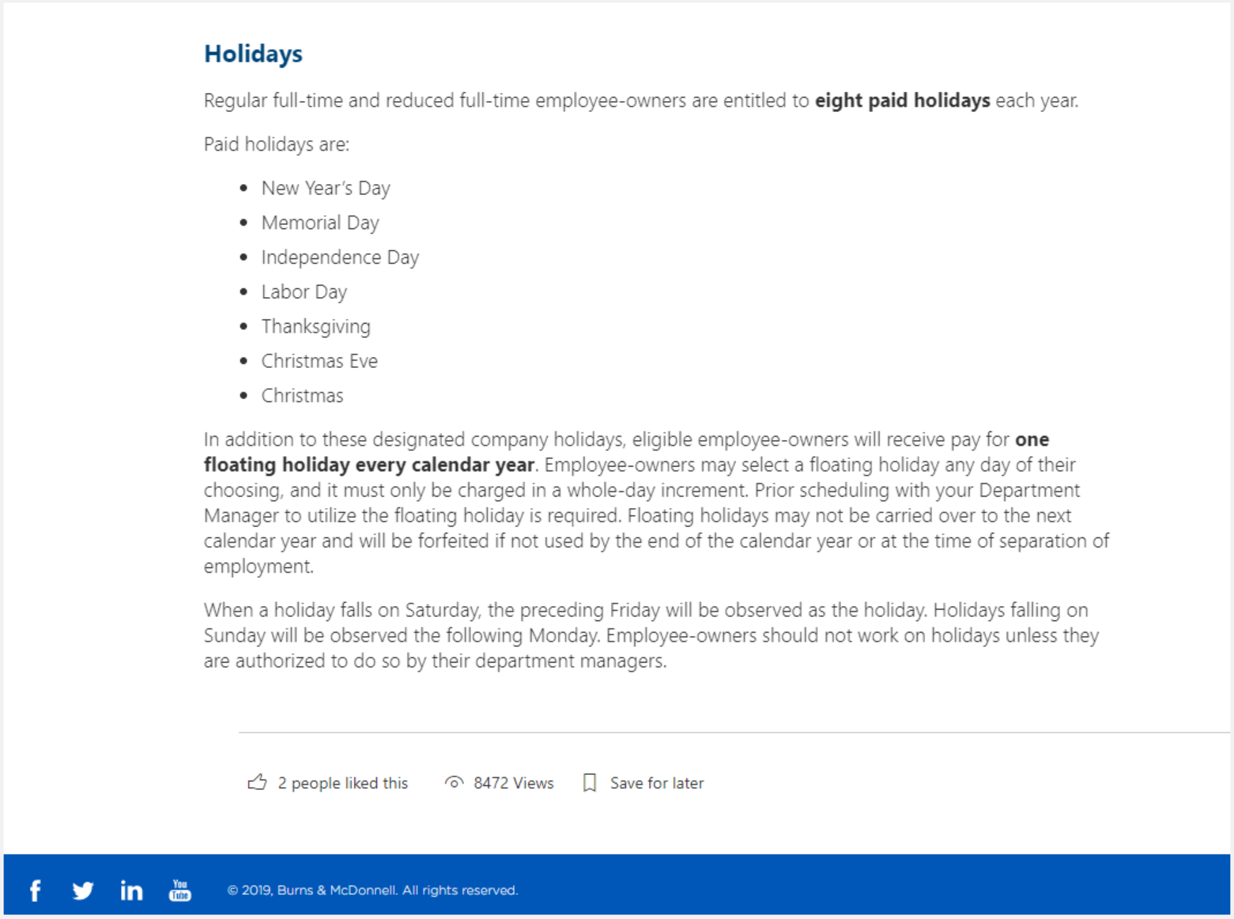
Bolding keywords and phrases is another formatting tactic that can help employees quickly narrow their focus to find specific pieces of valuable information. The bold information could pertain to doing their jobs or managing their well-being, but no matter the goal, bolding helps them speed up their skimming and scanning, allowing them to find what they need about a given topic or answer questions more efficiently.

Many intranets we studied had long-form text paragraphs with little visual emphasis to highlight critical information. Bold keywords and phrases help users quickly locate information. Instead of having to read information on dense pages, users scan for important phrases, such as the ones that are bolded.

Without bolded keywords and phrases to lead the way, employees may get stuck reading an abundance of text that may or may not satisfy their information needs. When determining which phrases to bold, content creators should consider what information employees care about learning most as it relates to a particular piece of content.

For example, Burns & McDonnell bolded two key phrases on an intranet page about paid holidays: the number of paid holidays employees received each year and the number of floating holidays employees could choose to take each year. The intranet team's regular cadence of conducting user research led them to understand that employees were often looking for these two specific answers within this piece of content, so it was an easy decision to bold these phrases.

This page also used other favorable content formatting tactics, such as a subheading that's visibly different from the body copy, a bulleted list of the eight paid holidays employees receive, and concise paragraphs that are nicely chunked with ample white space in between each one.



## Holidays

Regular full-time and reduced full-time employee-owners are entitled to **eight paid holidays** each year.

Paid holidays are:

- New Year's Day
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving
- Christmas Eve
- Christmas

In addition to these designated company holidays, eligible employee-owners will receive pay for **one floating holiday every calendar year**. Employee-owners may select a floating holiday any day of their choosing, and it must only be charged in a whole-day increment. Prior scheduling with your Department Manager to utilize the floating holiday is required. Floating holidays may not be carried over to the next calendar year and will be forfeited if not used by the end of the calendar year or at the time of separation of employment.

When a holiday falls on Saturday, the preceding Friday will be observed as the holiday. Holidays falling on Sunday will be observed the following Monday. Employee-owners should not work on holidays unless they are authorized to do so by their department managers.

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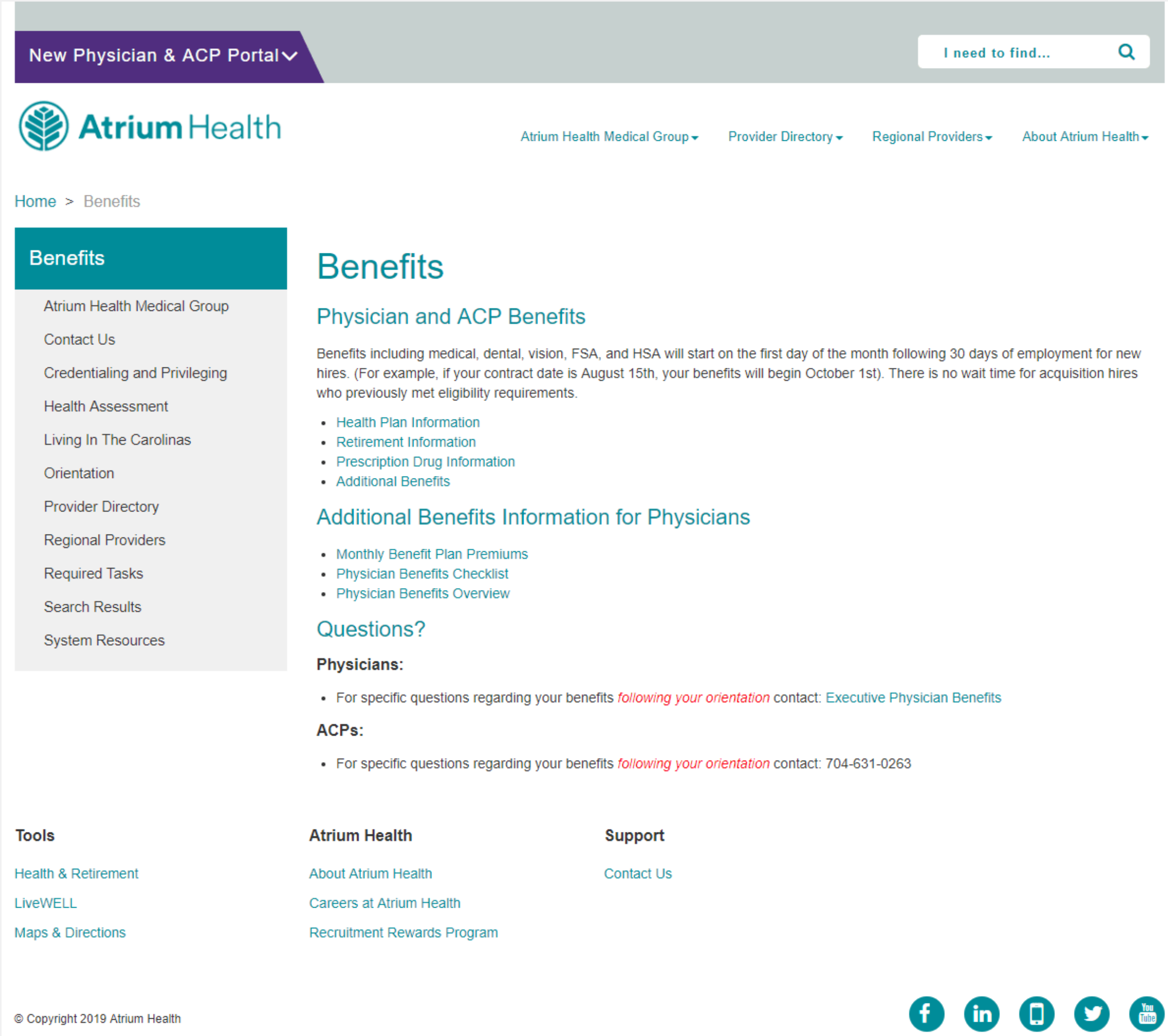
*Burns & McDonnell's* Holidays *content represents a good example of applying a bolded treatment to the keywords and phrases employees need most when scanning and skimming content.*

It's best to apply a bold treatment only in the dark gray or black font the copy already appears in rather than using or adding a color. Color treatments on keywords and phrases are usually reserved for link text and often appear in blue or another brand-friendly color. Additionally, avoid bolding *too many* keywords and phrases. It becomes harder for users to know what to pay attention to when too many things on the page are bolded.

One page on Atrium Health's intranet used red text to highlight a key phrase to draw users' attention to it. This is a less-than-optimal approach as red text often signals an error message, and users who are colorblind or have low vision won't be able to see this color treatment. A better approach would be to simply use a black, bolded font to draw users' attention to keywords and phrases.




*A* Benefits *page on Atrium Health's intranet used red text to draw users' attention to key content. A better approach would be to use a black, bolded font instead.*

## 11. Write in a tone of voice that aligns with the organization's culture and personality.

Communicating well on an intranet has as much to do with what is said as it does with how it's said. **Tone of voice** is *how* we say what we're saying, and it significantly impacts how employees ultimately feel about the intranet.

### Tone of voice

Definitions, Principles, and Methods

**Tone of voice** refers to the author's feelings toward the subject, as expressed through the writing.

In a friendly, laid-back company, the intranet content should evoke that casual feeling. On the other hand, in a more formal and polished company, the intranet content should have a tone of voice that reflects those values. In either case, the tonal values and writing style chosen for the intranet, whether formal or casual, should always be easy to read and understand. The tone of voice can vary slightly to fit individual contexts, such as intranet social media channels, but should still be relatively consistent throughout.

### Define the intranet's tone of voice in your content standards.

Process and Strategic Considerations

Use words that clearly define your intranet's tone of voice. Terms such as calm, cheerful, and conversational may describe the tone of voice used on an intranet at a company that conducts itself in such a manner.

It's also good to define which tonal values to avoid. For example, the same organization that's calm, cheerful, and conversational may want to ensure the tone doesn't become lazy, overly enthusiastic, or devolve into slang.

When defining an intranet's tonal values, a good place to start is to have employees read certain pieces of content and ask them to describe how the piece sounds to them. Determine if that description aligns with how you want the content to sound; if so, great! If not, it's time to revisit how the content is written.

For example, Eyeo GmbH used a tone of voice for its intranet that perfectly aligned with the writing goals and standards for voice and tone outlined in its content style guide:

# Writing goals

When we speak to others as eyeo, we have the following objectives:

- **Inform.** We want to let our audience know what's going on in the world of ad-tech, advertising, and ad-blocking. We want to be thought leaders in this space and show the world how much we care about forming a new online ecosystem that is fair for all.
- **Share.** We want to share behind-the-scenes stories and anecdotes that show the fun and joy that we have in this unorthodox company. We want people to be attracted to working for our company, and show that there are opportunities beyond the normal 9 to 5 office grind.
- **Be truthful.** We never want to make up claims or embellish our stories. We have enough going for us that we can speak the truth and still be a very attractive, thoughtful company.

To do this, we must have content that is:

- **Thoughtful.** There is no point writing anything just for the sake of it. Think about the audience you're trying to reach and write something that is useful for them. Our content should push conversations forward, rather than making unnecessary noise.
- **Warm.** Our content should be welcoming and friendly. We want to attract people to our company and our ideas. We shouldn't be abrasive or insulting to people, companies or the industry in general.
- **Appropriate.** Our tone can change depending on the subject matter at hand. The tone used for a sharing post can be different from industry commentary for example.
- **Clear.** We should always aim to distill complex industry jargon into plain English. Knowing that many of our readers do not speak English as a first language, we should keep our language simple and easy to read.

*The first thing Eyeo GmbH outlined in its content style guide was strong, purposeful writing goals, which is favorable.*

# Voice and tone

What is the difference between VOICE and TONE? Put simply, you have one voice. You can't change it — your voice is yours and yours alone. Your tone, however, can change. You will sound different when talking to a partner or close friend than you do in a job interview, for example. Tone also changes depending on emotion and situation; you would use a different tone for defusing an angry situation or giving congratulations at a happy event (we hope!).

## Voice

eyeo knows that the ad industry can be confusing. We also know that what we do as a company is not super easy to explain, and that we have many enemies. We should, however, attempt to walk the fine line of professionalism without resorting to attacks or one-upmanship while keeping our dialog clear and easily-understood. We also need to bring in a little bit of humor so we do not sound dry.

We would describe ourselves as "**Purposefully Simple**" - *The purposeful voice has a sense of momentum, even a sense of urgency. It is a voice that knows that there are more important things to be doing than reading - so it focuses on action and always gives a sense of moving towards its goal.*

*The purposeful voice is more rational than emotional. It is a voice you trust: to find solutions, to get things done, to be there in a crisis.*

*The simplifier voice sees things differently - not plain, simple. True simplifiers find surprise in clarity. 'Aha' moments in just a few syllables.*

This means when we write, we are:

- **Professional.** We understand the industry and the pressures on all sides. We do not insult or make fun of other industry players.
- **Smart.** We are an intelligent bunch and, as such, our content should reflect this. We do not shy away from difficult topics. We can comment on whatever is happening in the industry in an informed, well-researched way.
- **Clear.** We do not need to hide behind jargon or big words. We can be intelligent while at the same time speaking a language that everyone can understand. We are not patronizing.
- **Honest.** We do not need to lie or embellish. We can be honest about our failures, rather than just talking up our successes.
- **Witty.** We can use humor, but we use wit rather than going for jokes all the time. A subtle nod is better than an outrageous laugh.

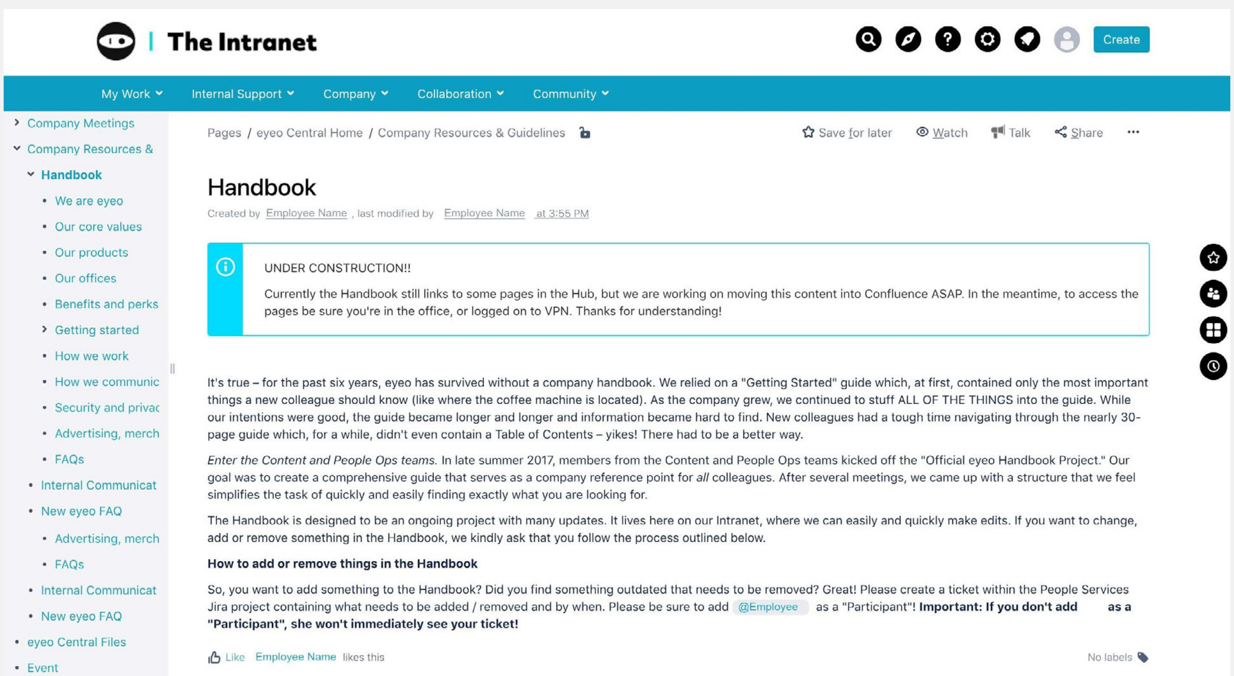
## Tone

eyeo's tone is "**natural**". It is the middle ground between formal and chatty. Clarity is key. Always consider the reader's mindset — are they angry about something? Are they happy that we have such a good recruitment process? Always adjust your tone to their emotional state.

*In its voice and tone standards, Eyeo GmbH did a nice job defining each tonal value and how writers and content creators should apply them in their work.*

The copy on the organization's intranet handbook page was a good example of applying the stated tone of voice to the intranet's content. One excerpt that demonstrates the organization's natural and witty tonal values particularly well was found in the very first sentences on the page. This tonally appropriate introduction helped employees feel comfortable using the intranet and encouraged them to return to it repeatedly to get relevant information that's also easy to feel good about:

> It's true – for the past six years, Eyeo has survived without a company handbook. We relied on a "Getting Started" guide which, at first, contained only the most important Things a new colleague should know (like where the coffee machine is located). As the company grew, we continued to STUFF ALL OF THE THINGS into the guide. While our intentions were good, the guide became longer and longer, and information became hard to find. New colleagues had a tough time navigating through the nearly 30-page guide, which for a while didn't even contain a Table of Contents—yikes! There had to be a better way.




*The content on Eyeo GmbH's intranet perfectly aligned with its stated writing goals and standards for tone of voice. Additionally, this page's prominent* Under Construction *message worked well to inform employees that the content was not yet final.*

## 12. Use words and phrases employees can easily understand the first time they hear or read them in intranet content.

Avoid using **jargon** and internal buzzwords in intranet content. Jargon inhibits employees from understanding content and also discourages further intranet exploration. To a general audience, jargon means nothing and takes more time and cognitive energy to process.

When employees encounter jargon, buzzwords, and acronyms, they slow down their skimming and scanning to attempt to associate meaning to these words. They won't draw the intended meaning from the intranet's content if they've never heard the term or acronym before.

### Jargon

Definitions, Principles, and Methods

**Jargon** is special words or expressions are used by a particular profession or group and are difficult for others to understand.

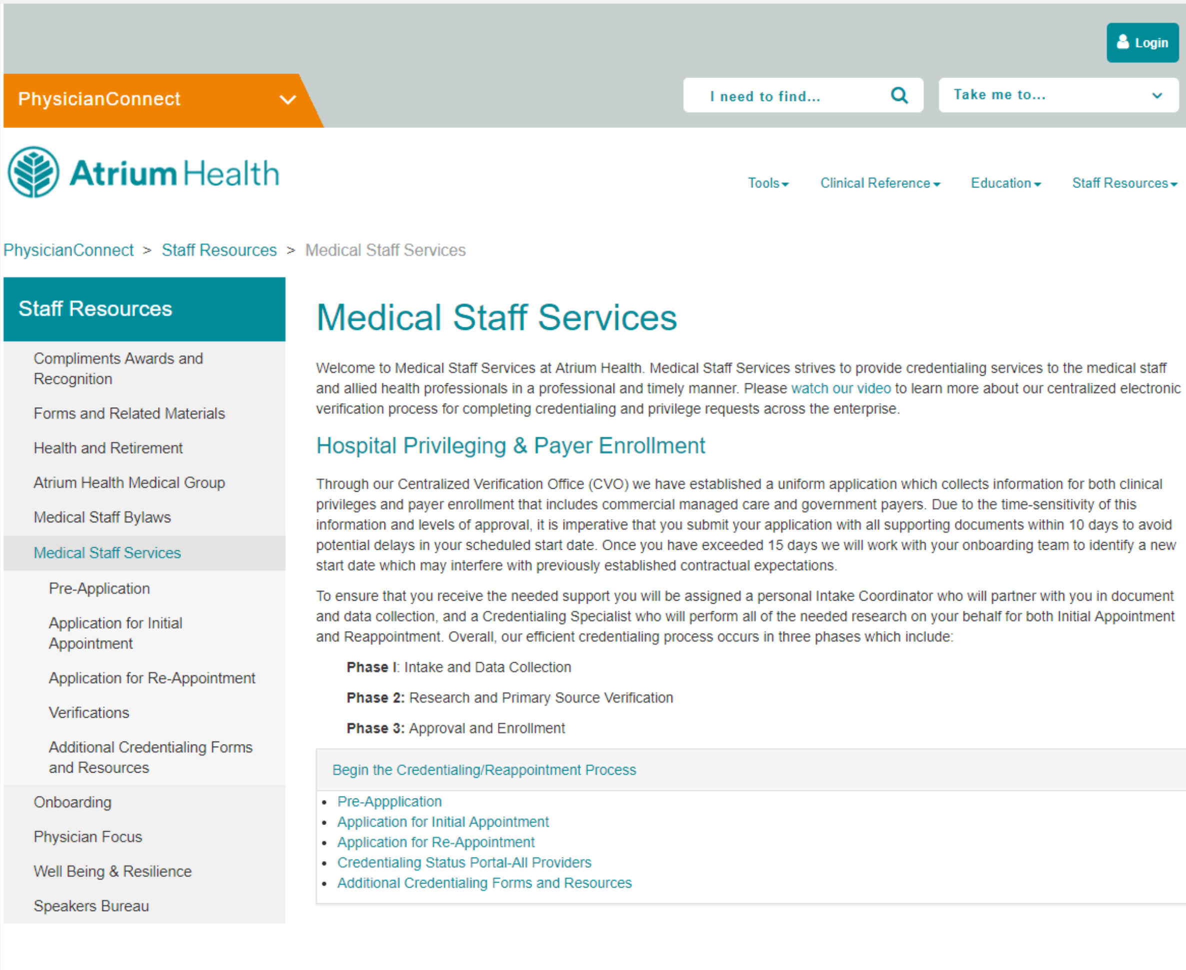
It's also important to avoid using **acronyms** in intranet content. For example, instead of writing *EOD,* simply spell out the entire phrase, *end of day*.

### Acronyms

Definitions, Principles, and Methods

An **acronym** is abbreviation is formed from other words' initial letters and pronounced as a word.

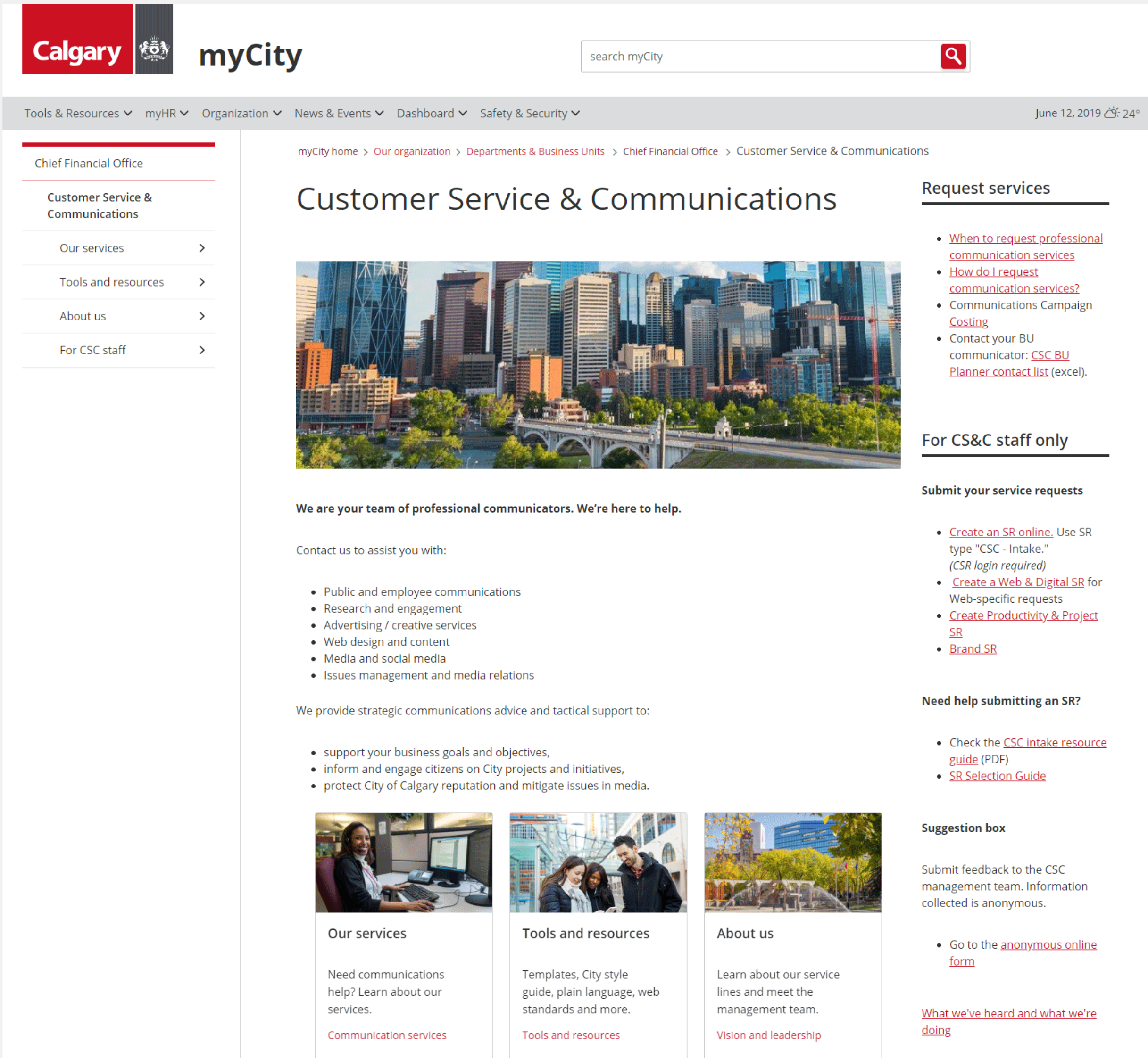
If an acronym can't be avoided, at least define it in context using additional descriptive copy. Spelling out the full phrase and providing the acronym in parenthesis is also an effective approach. Atrium Health did this with the phrase, *Centralized Verification Office* (CVO) on its intranet. Another method for making acronyms much more meaningful is to give examples or make a clear analogy to provide further explanation.




*Atrium Health did a nice job spelling out an acronym* for Centralized Verification Office (CVO) *on its staff services page and also provided the acronym in parentheses, so employees knew what it meant.*

The City of Calgary didn't take such a user-friendly approach with its use of acronyms. Five different acronyms appeared on the intranet's *Customer Service and Communications* page in the right rail. We could guess what these meant based on our study and the context clues on the page. However, newer employees would likely have less success deciphering the meaning of these acronyms, and their guesses, much like ours, may be incorrect. A better approach would be to spell out these phrases fully and include the acronym in parentheses if needed.

- **CSC** = Customer Service and Communications (CSC)
- **BU** = Business Unit (BU)
- **CSC BU** = Customer Service and Communications Business Unit (CSC BU)
- **SR** = Service Request
- **CSR** = *Unknown*

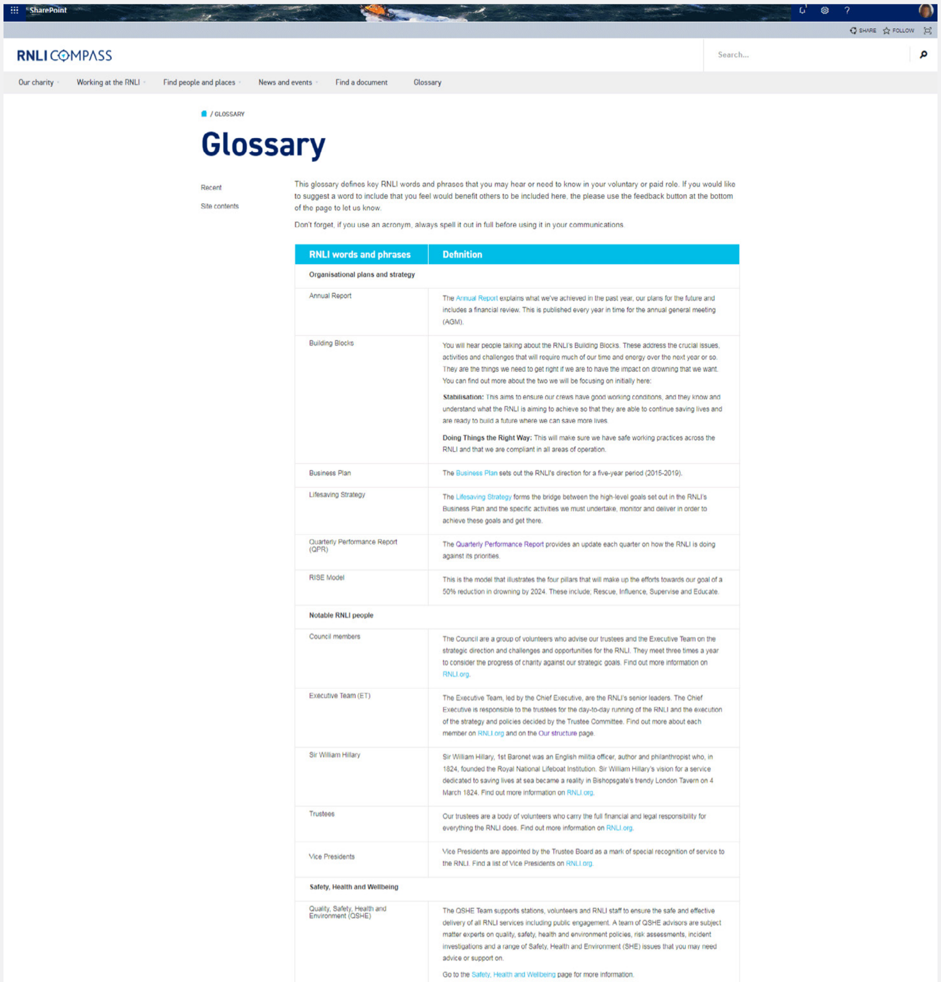



*The City of Calgary's intranet used several acronyms on its* Customer Service and Communications *page. Without spelling out these phrases in full, employees may be left guessing what they stand for and ultimately mean.*

Jargon, internal buzzwords, and acronyms are especially problematic for new and international employees, who may not have the necessary context or experience level to understand the content. In some cases, however, using certain jargon terms is acceptable, such as the following:

- The audience is comprised of only internal domain or department experts.
  - No general employee audience
  - No new employees
  - No employees working in tangential roles
- The subject matter carries with it a formally defined and shared vocabulary.
- There are no alternatives to the jargon term that would be as specific or meaningful for employees.
- Explaining the term would cause employees to question whether the content was written for them.

We observed a great example of ensuring certain terms and acronyms used on the intranet are inclusive, clear, and meaningful for all employees at The Royal National Lifeboat Institution. They included a glossary of common terms used in the organization, many of which could be considered jargon for newer employees or those unfamiliar with these words. In addition to full phrases, they also included common acronyms so that employees knew what others were referring to, whether in writing or verbally. The introductory copy displayed on this screen was also explanatory and offered employees an easy way to submit a phrase or acronym to add to the glossary. It also reminded employees to always spell out acronyms in full before using them in communications, which was favorable.



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/ GLOSSARY

# Glossary

Recent

Site contents

This glossary defines key RNLI words and phrases that you may hear or need to know in your voluntary or paid role. If you would like to suggest a word to include that you feel would benefit others to be included here, the please use the feedback button at the bottom of the page to let us know.

Don't forget, if you use an acronym, always spell it out in full before using it in your communications.

| RNLI words and phrases | Definition |
|---|---|
| **Organisational plans and strategy** | |
| Annual Report | The Annual Report explains what we've achieved in the past year, our plans for the future and includes a financial review. This is published every year in time for the annual general meeting (AGM). |
| Building Blocks | You will hear people talking about the RNLI's Building Blocks. These address the crucial issues, activities and challenges that will require much of our time and energy over the next year or so. They are the things we need to get right if we are to have the impact on drowning that we want. You can find out more about the two we will be focusing on initially here: **Stabilisation:** This aims to ensure our crews have good working conditions, and they know and understand what the RNLI is aiming to achieve so that they are able to continue saving lives and are ready to build a future where we can save more lives. **Doing Things the Right Way:** This will make sure we have safe working practices across the RNLI and that we are compliant in all areas of operation. |
| Business Plan | The Business Plan sets out the RNLI's direction for a five-year period (2015-2019). |
| Lifesaving Strategy | The Lifesaving Strategy forms the bridge between the high-level goals set out in the RNLI's Business Plan and the specific activities we must undertake, monitor and deliver in order to achieve these goals and get there. |
| Quarterly Performance Report (QPR) | The Quarterly Performance Report provides an update each quarter on how the RNLI is doing against its priorities. |
| RISE Model | This is the model that illustrates the four pillars that will make up the efforts towards our goal of a 50% reduction in drowning by 2024. These include; Rescue, Influence, Supervise and Educate. |
| **Notable RNLI people** | |
| Council members | The Council are a group of volunteers who advise our trustees and the Executive Team on the strategic direction and challenges and opportunities for the RNLI. They meet three times a year to consider the progress of charity against our strategic goals. Find out more information on RNLI.org. |
| Executive Team (ET) | The Executive Team, led by the Chief Executive, are the RNLI's senior leaders. The Chief Executive is responsible to the trustees for the day-to-day running of the RNLI and the execution of the strategy and policies decided by the Trustee Committee. Find out more about each member on RNLI.org and on the Our structure page. |
| Sir William Hillary | Sir William Hillary, 1st Baronet was an English militia officer, author and philanthropist who, in 1824, founded the Royal National Lifeboat Institution. Sir William Hillary's vision for a service dedicated to saving lives at sea became a reality in Bishopsgate's trendy London Tavern on 4 March 1824. Find out more information on RNLI.org. |
| Trustees | Our trustees are a body of volunteers who carry the full financial and legal responsibility for everything the RNLI does. Find out more information on RNLI.org. |
| Vice Presidents | Vice Presidents are appointed by the Trustee Board as a mark of special recognition of service to the RNLI. Find a list of Vice Presidents on RNLI.org. |
| **Safety, Health and Wellbeing** | |
| Quality, Safety, Health and Environment (QSHE) | The QSHE Team supports stations, volunteers and RNLI staff to ensure the safe and effective delivery of all RNLI services including public engagement. A team of QSHE advisors are subject matter experts on quality, safety, health and environment policies, risk assessments, incident investigations and a range of Safety, Health and Environment (SHE) issues that you may need advice or support on. Go to the Safety, Health and Wellbeing page for more information. |

*The Royal National Lifeboat Institution included a glossary of terms on its intranet, which helped employees decipher the meaning of any jargon, buzzwords, or acronyms they encountered on the intranet and in other communications.*

Problems arise when employees encounter acronyms on the intranet. For example, a Mayo Clinic employee searched using the phrase "census Rochester February 2019" to determine the number of patients admitted to the hospital in February 2019. Some search results included the acronym *REP* in the titles, and the employee said, "I wouldn't take a look because I don't know what it stands for."

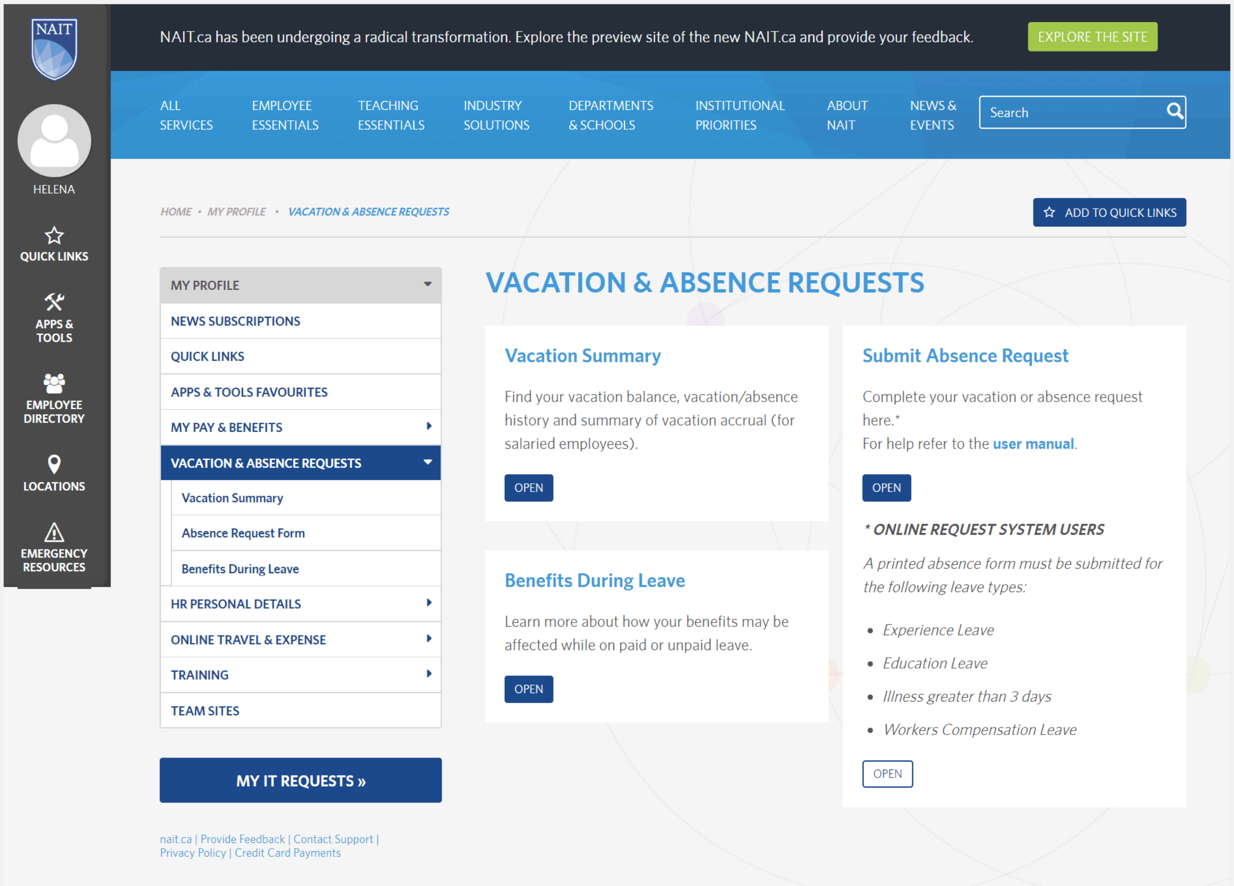
On the same intranet, when another employee tried to submit an IT ticket to get a broken phone fixed, he overlooked the proper category he needed to use to submit the ticket. One of the categories appeared as *report a telecom issue* when he was looking for something that included the word, *phone*. *Telecom* was jargon to him, so he mistakenly selected the *other issues* category when submitting the request.

We noticed these types of mistakes were uncommon among people who had worked at the Mayo Clinic for a long time. When organizations expand rapidly, using more conclusive words will help more employees better understand the intranet content. Use inclusive words and get rid of the jargon when writing the content.

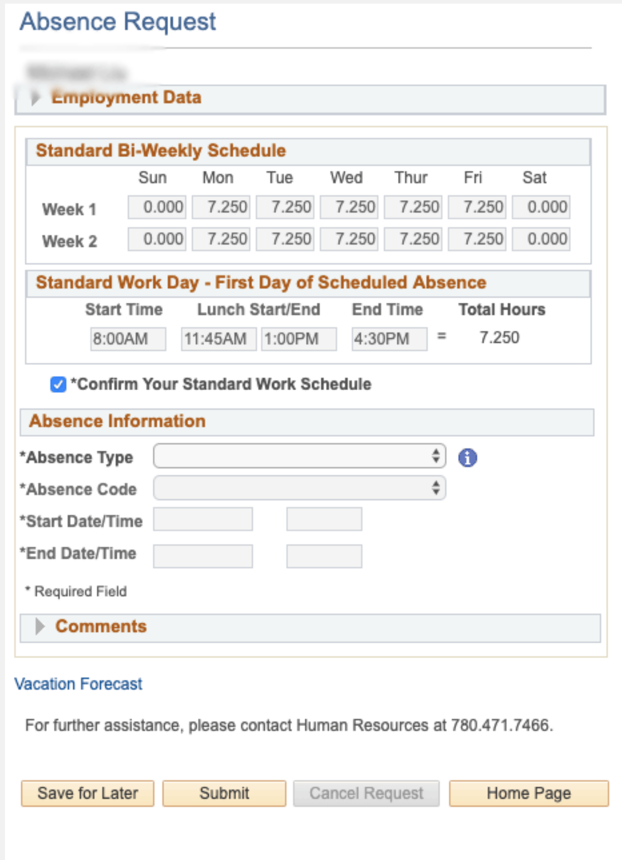
On the Northern Alberta Institute of Technology's intranet, the language used in the category dropdown on the *Vacation Request* tool was overly complex. When an employee was attempting to request a half-day of vacation, they said:

> "Pretend the user is ten years old and has that type of language in it. I've literally been here once, and I couldn't tell how to do this on my own. It needs more instructions, but basic instructions would be key. Tell them exactly what to do. Make it easily readable."

The intranet page that directed employees to the *Vacation Request* tool provided a clear path to the content; however, neither this page nor the tool itself offered any explanation to clarify the various types of vacation employees could request and when to request one type or another (e.g., *Special Leave, Vacation* and *Illness, Casual Illness)*. A better approach would be to provide definitions and explanations of use on the intranet page and within the tool itself.




*Employees at The Northern Alberta Institute of Technology had a clear path to access the* Vacation Request *tool; however, many different leave types were not well-described on this page or in the tool itself. This made the terms appear as jargon to employees trying to request vacation.*




*Once employees at the Northern Alberta Institute of Technology's landed on the* Absence Request *tool, they encountered jargon in* the Absence Type *and* Absence Code *dropdowns. Providing clear definitions and use cases for each absence type and code would improve this tool.*

### Usability test content with employees regularly.

**Process and Strategic Considerations**

Teams often prioritize testing the visual design of digital experiences; however, it's just as important, if not more important, to also test *content*. After all, employees come to the intranet for content. They come to learn about a topic, gather information, or find answers, all of which is done through content. Unless they work on the intranet specifically, most employees won't go to the intranet to simply admire its visual design.

A helpful way to test intranet content is to create simple wireframes with most design elements removed. This way, employees can focus on reading, scanning, and skimming the content instead of getting distracted by design elements. After interacting with the content or attempting to complete representative tasks, ask employees to summarize what the content communicated in their own words. Your content will likely achieve its goals if they can do this successfully. If employees still have questions or fail to understand certain parts, those are great opportunities to improve the content further, using the feedback employees provide.

## 13. Write in active voice.

Though this guideline may seem like a flashback to high school grammar class, when writing content for the intranet, it's important to write in the active voice. In our research, we observed intranets still using passive rather than active voice.

Active voice is more direct and concise. Writing in this style helps employees be efficient while consuming content. Active voice is stronger and often less awkward to read. For multilingual organizations, it's also much easier for non-native English speakers to understand. The only times it's acceptable to use passive voice in intranet content is when it helps to front-load headings and subheadings with information-carrying keywords or when the subject performing the action stated by the verb is not important or known.

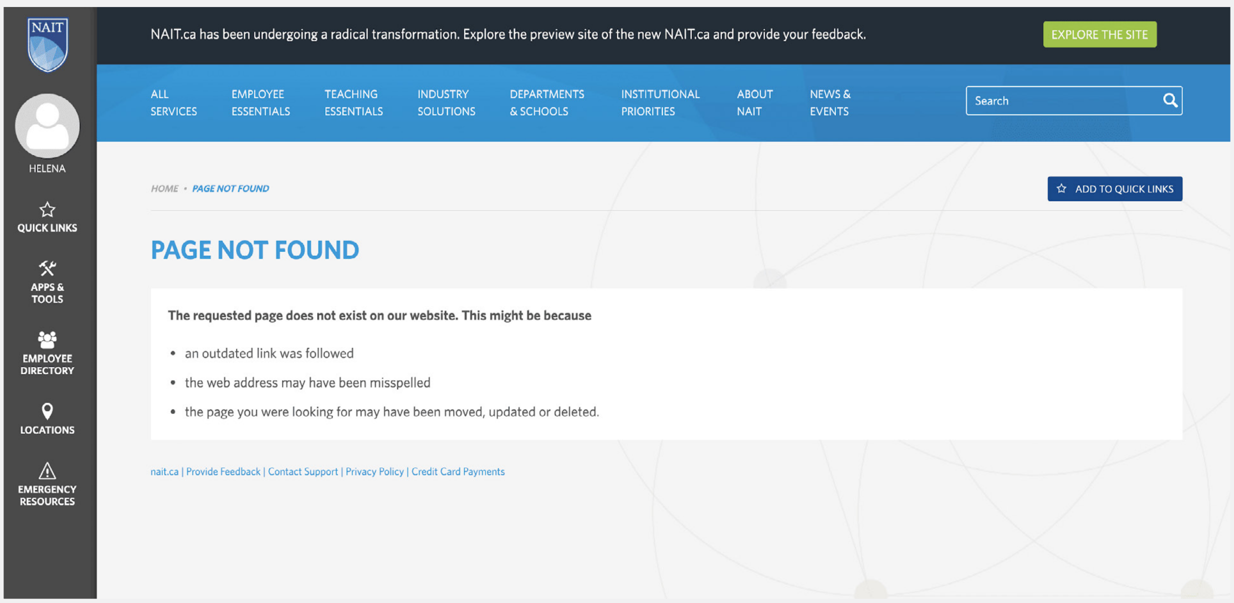
In passive voice, it's unclear who the subject is. The easiest way to spot passive voice to edit it out of your writing is to look for a *to be* verb such as *is, are, was, were, be, been,* etc., and the past participle of the verb.

For example, the *404 Page Not Found* error page on the Northern Alberta Institute of Technology's intranet used passive voice in the reasons outlined for why the page appeared. The options read:

- An outdated link ***was followed.***
- The web address may ***have been misspelled.***
- The page you were looking for may ***have been moved, updated, or deleted.***

A better way to rewrite these phrases using active voice is:

- You followed an outdated link.
- You misspelled the web address.
- We moved, updated, or deleted the page you were looking for.



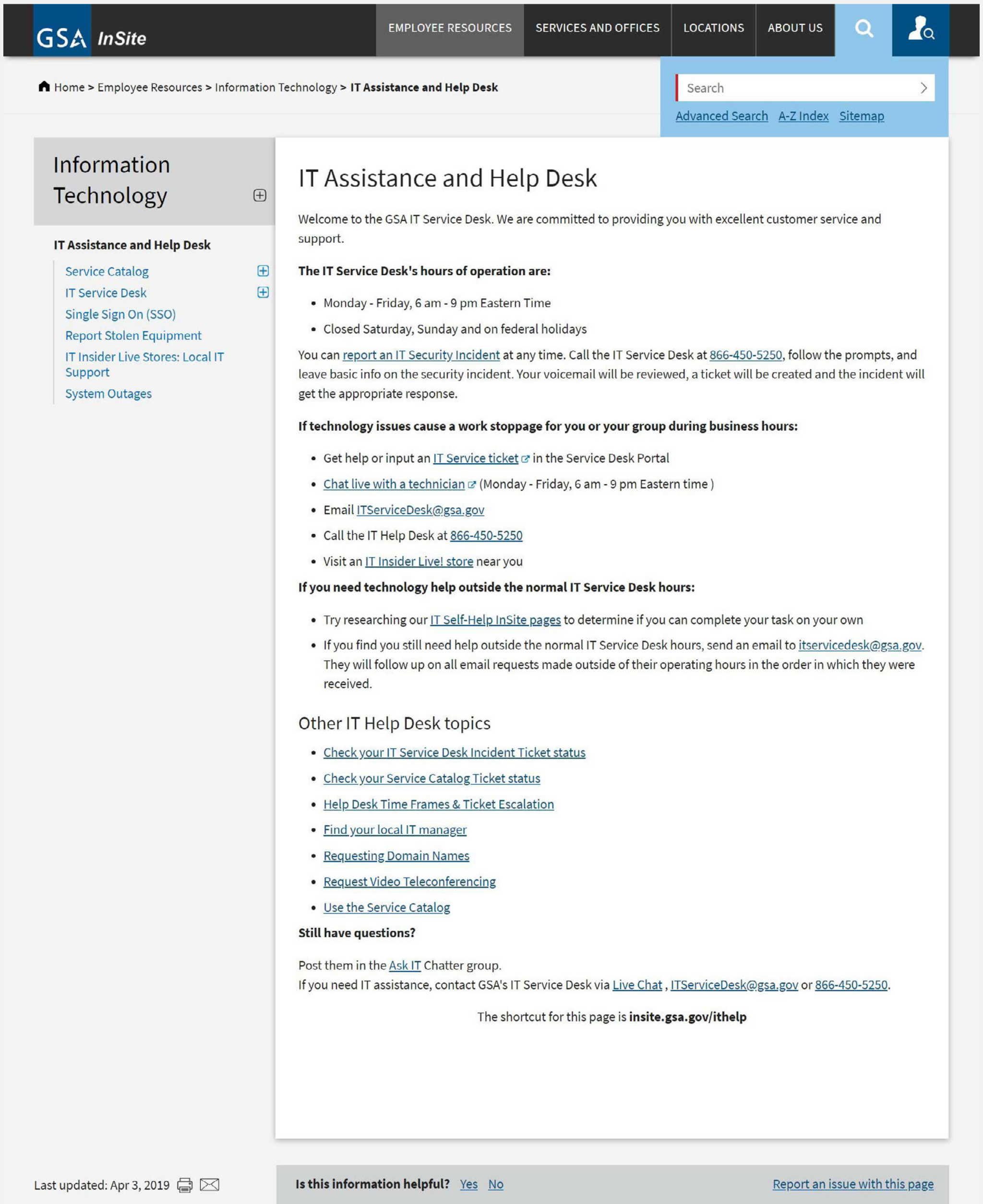

*The 404 error page on the Northern Alberta Institute of Technology's intranet used passive voice instead of active voice to outline the reasons why the page appeared.*

The *IT Assistance and Help Desk* page on the General Services Administration's intranet featured a friendly and casual yet professional tone of voice that was very easy to understand. The page had clear headings and subheadings and also used bulleted lists effectively to draw the employee's attention to key areas of the page. The link text on this page was also well-written and contained many information-carrying words that set expectations for where employees would go upon click.

While this page adheres to most of the guidelines for writing strong intranet content, the final sentence in the last paragraph contains an abundance of passive voice. It reads:

> Your voicemail **will be reviewed**, a ticket **will be created,** and the incident will get the appropriate response.

The team at the General Services Administration could rewrite this sentence using active voice by saying, *We will review your voicemail, create a ticket, and respond to the incident accordingly*. It would be even better and more user-friendly to communicate how long employees typically must wait before the IT team addresses common issues.



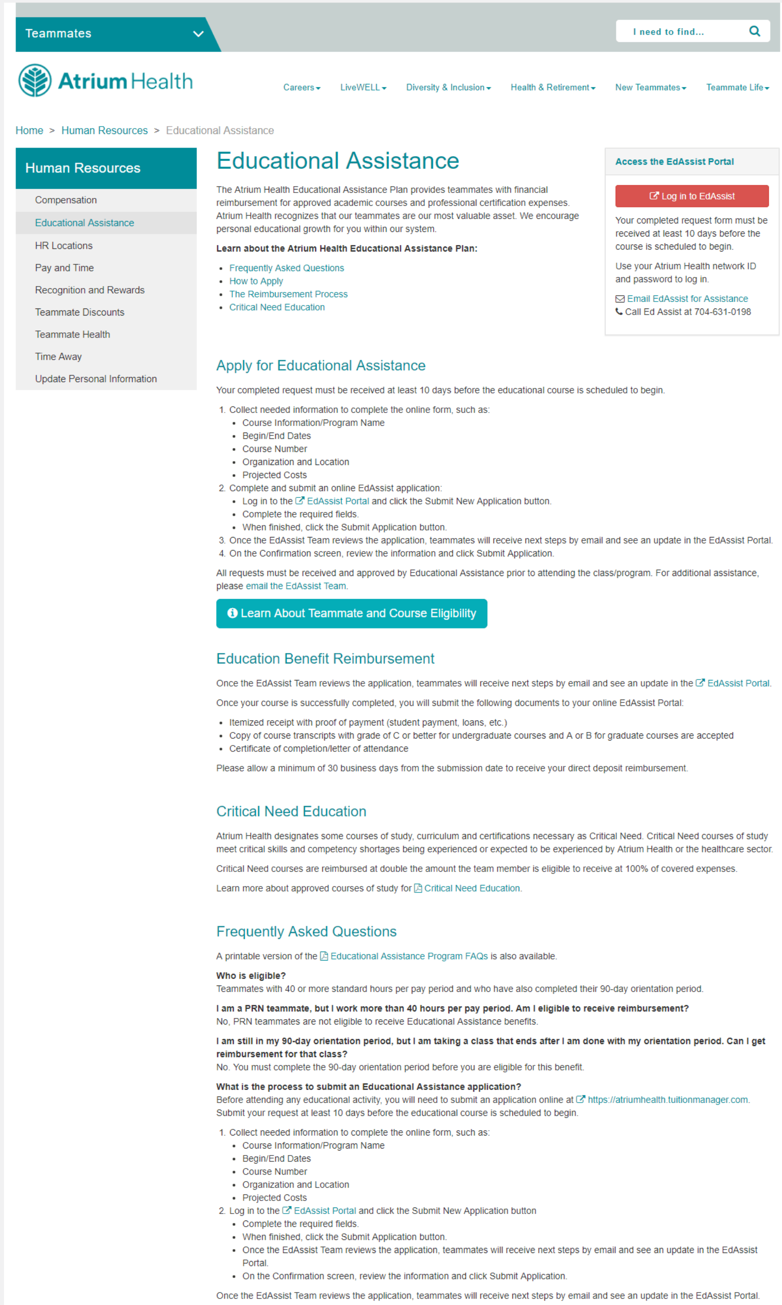

*The* IT Assistance and Help Desk *page on the General Services Administration's intranet used a casual yet professional tone of voice and used many favorable formatting techniques, such as clear subheadings, action-oriented link text, and bulleted lists. One way to improve the content even further would be to edit the few instances of passive voice and rewrite the copy using active voice.*

## 14. Use anchor links to help jump down to key sections of long pages.

Anchor links show employees what specific sections are available within a lengthy piece of content. Often acting as a table of contents, anchor links are another tool to help employees understand the scope of information and how it's structured on a page.

Anchor links afford direct and easy access to pieces of content, which helps employees be more precise and productive in locating specific information. They also usually take up minimal screen space, as they're just a simple list of links. On click of an anchor link, the user jumps gracefully down to the corresponding section on the page.

For example, Atrium Health's intranet effectively used anchor links on a long page about *Educational Assistance* benefits. However, there were slight adjustments the intranet team could make to improve the anchor links even further.




*Atrium Health used anchor links on its intranet to help users jump down to key sections of the page that may interest them. Though favorable, a few slight improvements to these anchor links would make them clearer and more user-friendly.*

Some favorable aspects of Atrium's use of anchor links included:

- The anchor links appeared high up on the page, underneath the main headline and meaningful introductory body copy.
- A subheading appeared right above the anchor links.
- The anchor links appeared in teal-colored text, which aligned with Atrium's global treatment for link text across the intranet.
- Some anchor links directly coincided with the subheadings, such as *Frequently Asked Questions* and *Critical Need Education*, that appeared on the page.

A few improvements Atrium Health could make to the anchor links include the following:

- **Offer a clearer introductory subheading:** Though the subheading *Learn about the Atrium Health Educational Assistance Plan* appears on this page, it could more accurately set users' expectations for what will happen after clicking on one of the anchor links. A better subheading would be *Skip to Educational Assistance Information on this Page*.
- **Write anchor link text that directly reflects the subheadings:** In this example, the list of anchor links includes, *Frequently Asked Questions, How to Apply, The Reimbursement Process, and Critical Need Education.* Though the anchor links and subheadings for *Frequently Asked Questions* and *Critical Need Education* are consistent, the other subheadings on the page say, *Apply for Educational Assistance and Education Benefit Reimbursement*. A better approach would be to make those subheadings say, *How to Apply* and *The Reimbursement Process.* By doing so, employees will feel more confident that the anchor link scrolled them down to the correct section of the page.
- **Display anchor links in the same order as the subheadings on the page:** The anchor links here also display out of order, compared to the order in which the subheadings appear. Instead, the anchor links should be displayed in this order: *How to Apply*, *The Reimbursement Process, Critical Need Education,* and *Frequently Asked Questions*.

With anchor links, ensure the jump transition down the page is visible to employees. You don't want users thinking or feeling like they've suddenly gone to another page, which we often see in our studies when the interaction design of anchor links isn't as polished as it could be. However, this interaction shouldn't be jarring, either. Users shouldn't completely lose the context of where they are and what just happened.

Additionally, anchor links usually pair nicely with a *back to top* button, especially on long pages, so users can quickly return to the list of anchor links above. Some desktop versions of intranets even have anchor links that remain sticky as users scroll through the main body copy on the page.

## 15. Layer content to provide the right level and type of detail employees expect.

We can't just throw every piece of information at employees all at once. We have to layer intranet content so employees get each piece when they need it or are ready to consume it. Typically, the best way to layer content is to start with a simple overview that's meaningful and relevant to the page topic.

The overview should answer the key questions employees will ask themselves while reading content on the intranet:

1. Where is the information I need?
2. What's it in for me?

The overview should also answer who, what, where, when, and why. Then, allow people to dig deeper into the subsequent, more detailed sections they are interested in. This approach is known as using the **inverted pyramid writing style.**

### Inverted pyramid writing style

**Definitions, Principles, and Methods**

The **inverted pyramid** is a story structure borrowed from print journalism, where the most critical information (or what might even be considered the conclusion) is presented first. The who, what, when, where, and why appear at the beginning of a story, followed by supporting details and background information.

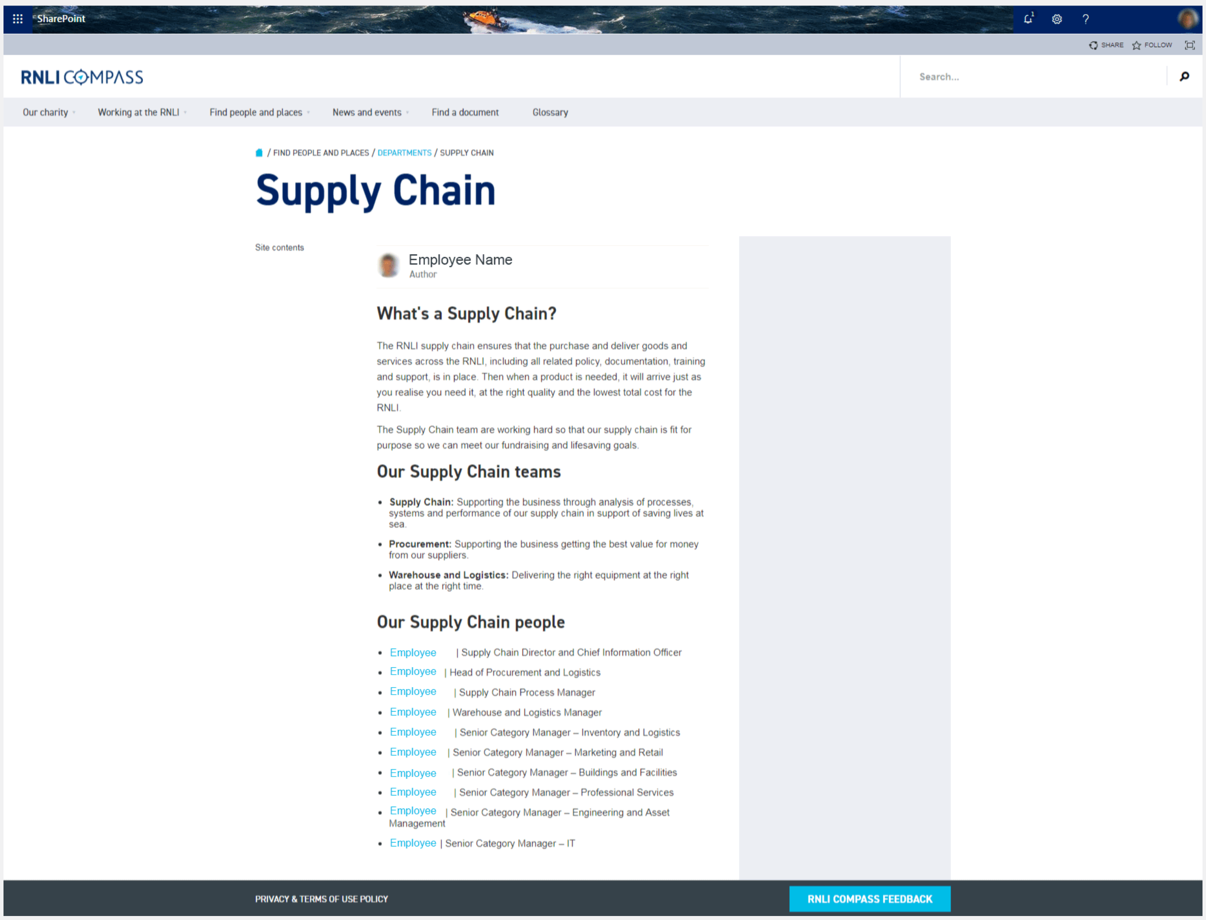
In print publishing, the limiting factor used to be space; we only had so much room on the page for different articles. With digital, space isn't a limiting factor. We essentially have unlimited space that we could fill with tons of text if we wanted to, but our limiting factor is users' attention spans.

So, we want to ensure that if someone starts reading our copy and gets through only the first paragraph before they get distracted, it's ok because we've already communicated the most important information.

The Royal National Lifeboat Institution's intranet is a good example of using this writing style by nicely layering and structuring content to prioritize and include the right types and level of details employees need. For instance, on its *Supply Chain* page, the content started with what a supply chain is, what the team does, and why it's important to employees and the organization.

The next layer dove into detail about specific teams in the supply chain department, then the final layer catered to people looking for others who worked on this team, along with their names, titles, and assigned departments. They brilliantly started with general information, giving more detailed information as users progressed through the other layers of content on the page.

For the employees who don't want all of the introductory content, they don't have to bother with it. They can skip around because the Royal National Lifeboat Institution included good subheadings within the content. But, for those who want it, it's there, and they have access to it.

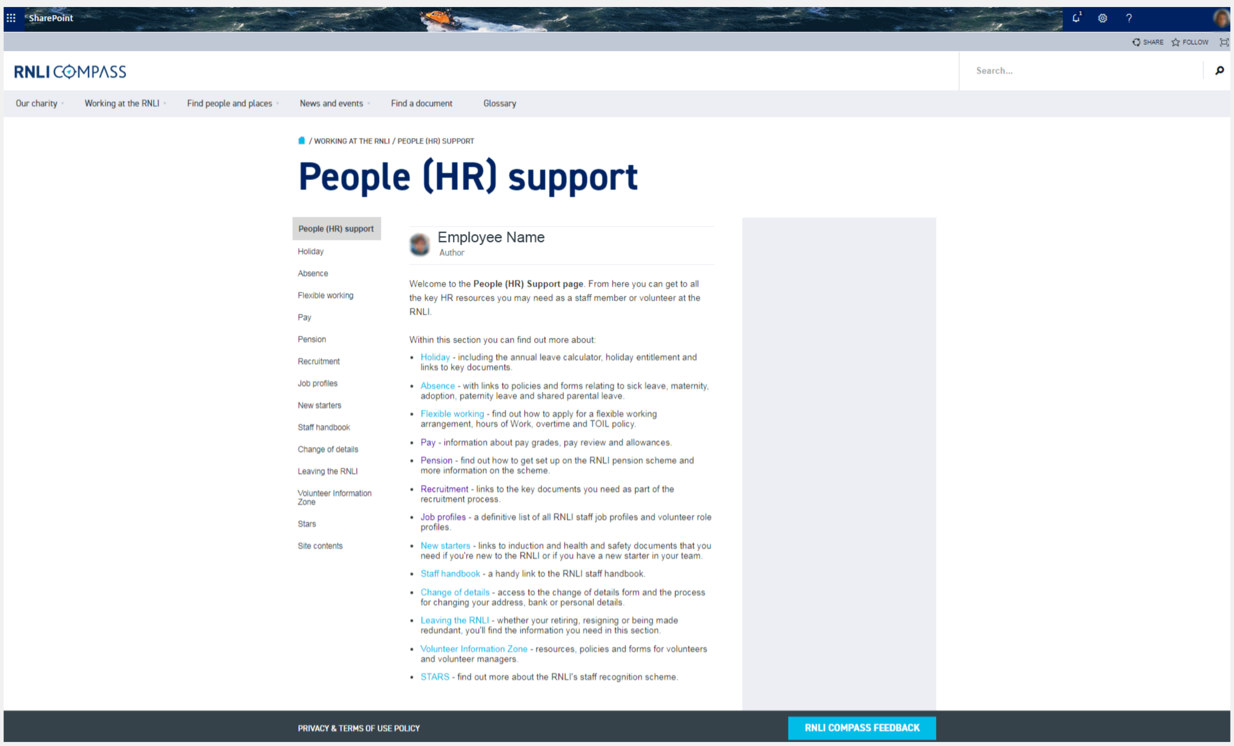



*The Royal National Lifeboat Institution layered the content on its* Supply Chain *page and used clear subheadings to help draw employees' attention to key areas of emphasis.*

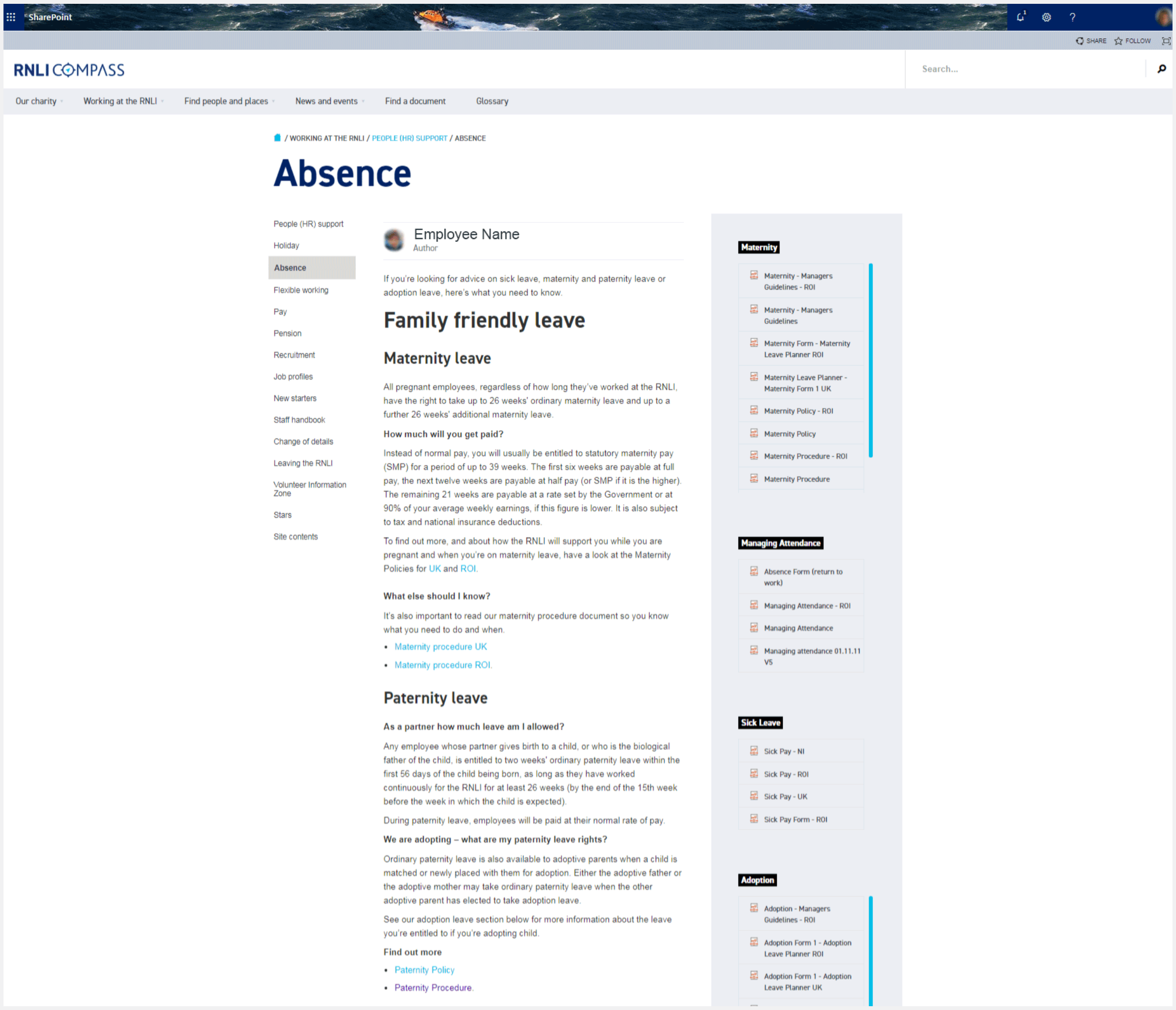
Content layering can happen on a single page or can be used to strategically link content across multiple, more focused pages, as long as those individual pages are not composed of shallow content. That's where content starts to overlap with interaction design, and we get into findability issues if the layering is not done well. So as long as you're careful, content layering can be powerful and ensure that the intranet doesn't have a ton of content that creators and publishers have to try to figure out how to structure for an audience with very different or diverse information-seeking needs.

The Royal National Lifeboat Institution also used this multi-page approach to layer content in another area of its intranet. The *People (HR) Support* page offered an overview of what users could expect to find in the side navigation. In one task, we asked employees to find information related to adoption leave. This content approach helped users realize that somebody could find the answer under the *Absence* sub-category within this section. One user said, “It’s good that it says what each of those sections is about.”

This approach also saved another user from thinking they might fail to locate the information on the first try. As they scanned the page, they said, “Maybe it’s in HR support. I don’t think it’s there, either. Oh, hang on! It’s under absence.” Then they went on to successfully complete the task.




*In addition to layering content on a single page, the Royal National Lifeboat Institution also layered content across multiple linked pages. When users were looking for information about adoption leave, they got a clear sense of what they’d find on each page within the section. The second bullet point, containing a link and a short description of the* Adoption *page, indicated to users that this was the page they needed.*




*Once users landed on the* Absence *page, the content was well structured and layered here as well. Each type of absence got its own dedicated page section, and each was labeled and had a clear and visible subheading.*

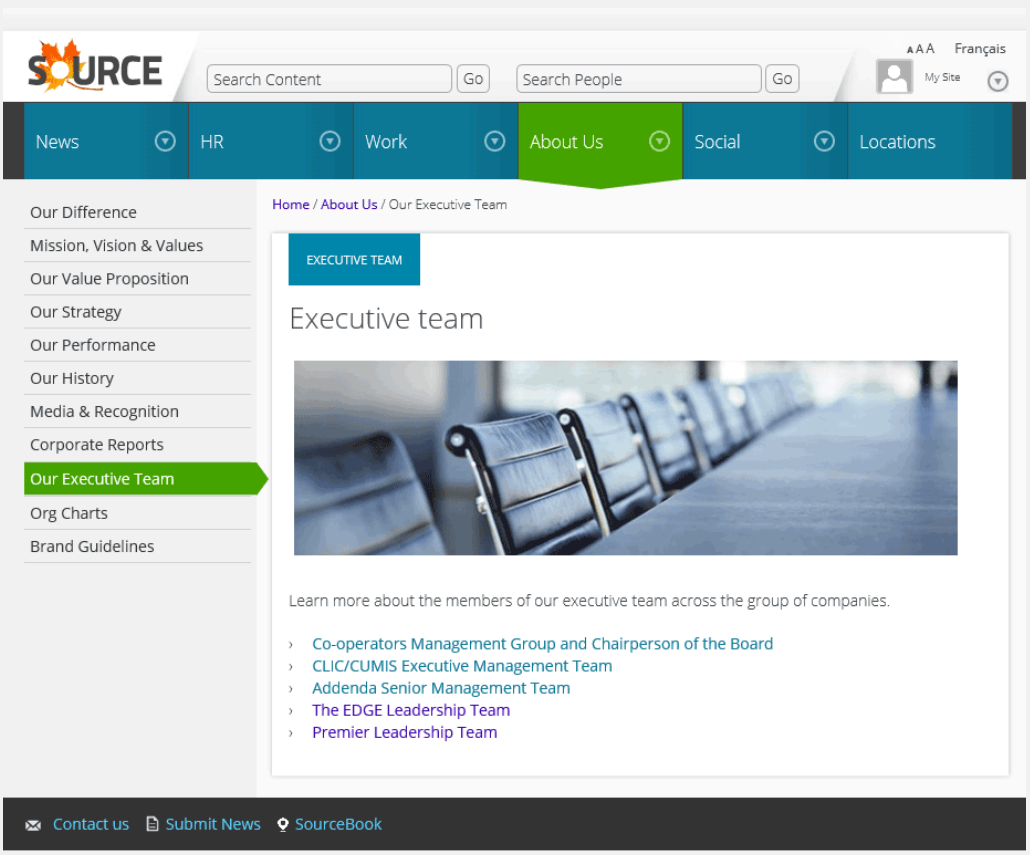
Though the Royal National Lifeboat institution did a nice job layering its content, other intranets didn't follow this approach quite as well. At Co-operators, users grew confused when headings and page content weren't effectively layered and didn't reflect the links they clicked. A user trying to find out when the Chief Financial Officer joined the organization chose the *About Us* link from the global navigation. Next, they clicked on a link labeled, *Our Executive Team*.

The resulting page didn't show what the user expected to see — an executive team — as the link had promised. Instead, it was a page with an image of a conference room table and links to different leadership teams. Not meeting her expectations, the user immediately left the page instead of clicking on the *Co-operators Management Group* and *Chairperson of the Board* links, where she would have found the executive bios and successfully completed the task.

Simple revisions to the page structure and layering the content to include the right types and level of detail employees expected would help improve it. Reorganizing the page to help employees realize they are drilling down to view the executive biographies in each area would be a good first step. For example, an introductory layer on the page could read: *The Co-operators has five main leadership teams:*

- *Team 1 Link: Team One is responsible for . . .*
- *Team 2 Link: The Team Two team is responsible for . . .*
- *Team 3 Link: The Team three team is responsible for . . .*

From there, users could click on each link to navigate to specific leadership biographies within that team. If space allows, an even better approach would be to list the individuals alongside their teams. By presenting leadership names as links, employees could then click to view the leader's profile or biography.




*On The Co-operator's intranet, when users clicked on* Our Executive Team *via the main navigation, they arrived at this page which listed five different teams. The page represents a less-than-optimal example of layering content, as there are no descriptive details for these teams, and users are left to do more clicking to find the executive bios. Adding detail to the page content and layering it so that it meets expectations when employees arrive here would be favorable improvements.*

## 16. Include summaries on long-form content.

Summaries are important **microcontent** to include in longer-form intranet content, such as news articles. Summaries give readers an overview of what they'll take away and help them to choose whether to read more based on the summary.

### Microcontent

**Definitions, Principles, and Methods**

Short text fragments or phrases are often presented with or without additional context. Microcontent is usually used to communicate key messages in a concise form.

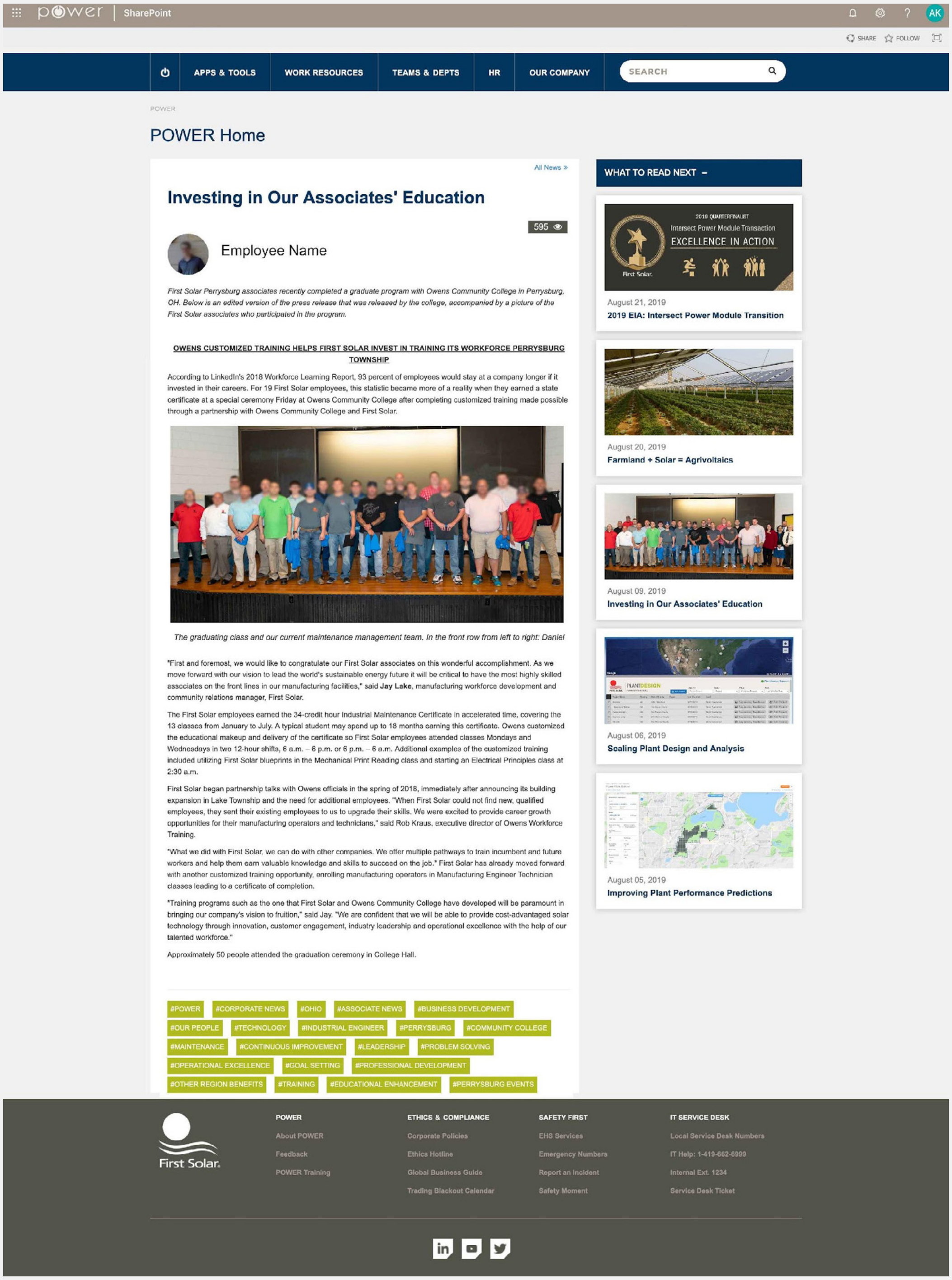
In addition to summaries, other types of microcontent include:

- Page titles
- Headlines
- Taglines
- Email subject lines and preheader text
- Hints, tooltips, explainers
- Social media copy

Summaries are also important because if they're descriptive enough, employees can sometimes understand the key messages and points of the piece without having to read the entire page. Employees always appreciate when tools save them time, so include summaries on longer content.

In one favorable example, First Solar included clear summaries on its intranet news articles. One summary read:

> First Solar Perrysburg associates recently completed a graduate program with Owens Community College in Perrysburg, OH. Below is an edited version of the press release that was released by the college accompanied by a picture of the First Solar associates who participated in the program.
>
> Owens Customized Training Helps First Solar Invest in Training Its Workforce in Perrysburg Township.


power | SharePoint
SHARE FOLLOW
APPS & TOOLS
WORK RESOURCES
TEAMS & DEPTS
HR
OUR COMPANY
SEARCH
POWER
POWER Home
All News »

Investing in Our Associates' Education

595

Employee Name

*First Solar Perrysburg associates recently completed a graduate program with Owens Community College in Perrysburg, OH. Below is an edited version of the press release that was released by the college, accompanied by a picture of the First Solar associates who participated in the program.*

OWENS CUSTOMIZED TRAINING HELPS FIRST SOLAR INVEST IN TRAINING ITS WORKFORCE PERRYSBURG TOWNSHIP

According to LinkedIn's 2018 Workforce Learning Report, 93 percent of employees would stay at a company longer if it invested in their careers. For 19 First Solar employees, this statistic became more of a reality when they earned a state certificate at a special ceremony Friday at Owens Community College after completing customized training made possible through a partnership with Owens Community College and First Solar.

*The graduating class and our current maintenance management team. In the front row from left to right: Daniel*

"First and foremost, we would like to congratulate our First Solar associates on this wonderful accomplishment. As we move forward with our vision to lead the world's sustainable energy future it will be critical to have the most highly skilled associates on the front lines in our manufacturing facilities," said **Jay Lake**, manufacturing workforce development and community relations manager, First Solar.

The First Solar employees earned the 34-credit hour Industrial Maintenance Certificate in accelerated time, covering the 13 classes from January to July. A typical student may spend up to 18 months earning this certificate. Owens customized the educational makeup and delivery of the certificate so First Solar employees attended classes Mondays and Wednesdays in two 12-hour shifts, 6 a.m. – 6 p.m. or 6 p.m. – 6 a.m. Additional examples of the customized training included utilizing First Solar blueprints in the Mechanical Print Reading class and starting an Electrical Principles class at 2:30 a.m.

First Solar began partnership talks with Owens officials in the spring of 2018, immediately after announcing its building expansion in Lake Township and the need for additional employees. "When First Solar could not find new, qualified employees, they sent their existing employees to us to upgrade their skills. We were excited to provide career growth opportunities for their manufacturing operators and technicians," said Rob Kraus, executive director of Owens Workforce Training.

"What we did with First Solar, we can do with other companies. We offer multiple pathways to train incumbent and future workers and help them earn valuable knowledge and skills to succeed on the job." First Solar has already moved forward with another customized training opportunity, enrolling manufacturing operators in Manufacturing Engineer Technician classes leading to a certificate of completion.

"Training programs such as the one that First Solar and Owens Community College have developed will be paramount in bringing our company's vision to fruition," said Jay. "We are confident that we will be able to provide cost-advantaged solar technology through innovation, customer engagement, industry leadership and operational excellence with the help of our talented workforce."

Approximately 50 people attended the graduation ceremony in College Hall.

#POWER #CORPORATE NEWS #OHIO #ASSOCIATE NEWS #BUSINESS DEVELOPMENT #OUR PEOPLE #TECHNOLOGY #INDUSTRIAL ENGINEER #PERRYSBURG #COMMUNITY COLLEGE #MAINTENANCE #CONTINUOUS IMPROVEMENT #LEADERSHIP #PROBLEM SOLVING #OPERATIONAL EXCELLENCE #GOAL SETTING #PROFESSIONAL DEVELOPMENT #OTHER REGION BENEFITS #TRAINING #EDUCATIONAL ENHANCEMENT #PERRYSBURG EVENTS

WHAT TO READ NEXT –

August 21, 2019
2019 EIA: Intersect Power Module Transition

August 20, 2019
Farmland + Solar = Agrivoltaics

August 09, 2019
Investing in Our Associates' Education

August 06, 2019
Scaling Plant Design and Analysis

August 05, 2019
Improving Plant Performance Predictions

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Corporate Policies
Ethics Hotline
Global Business Guide
Trading Blackout Calendar
SAFETY FIRST
EHS Services
Emergency Numbers
Report an Incident
Safety Moment
IT SERVICE DESK
Local Service Desk Numbers
IT Help: 1-419-662-6999
Internal Ext. 1234
Service Desk Ticket

*First Solar included summaries on its news articles. These important pieces of microcontent helped employees decide if they wanted to dedicate time to reading further.*

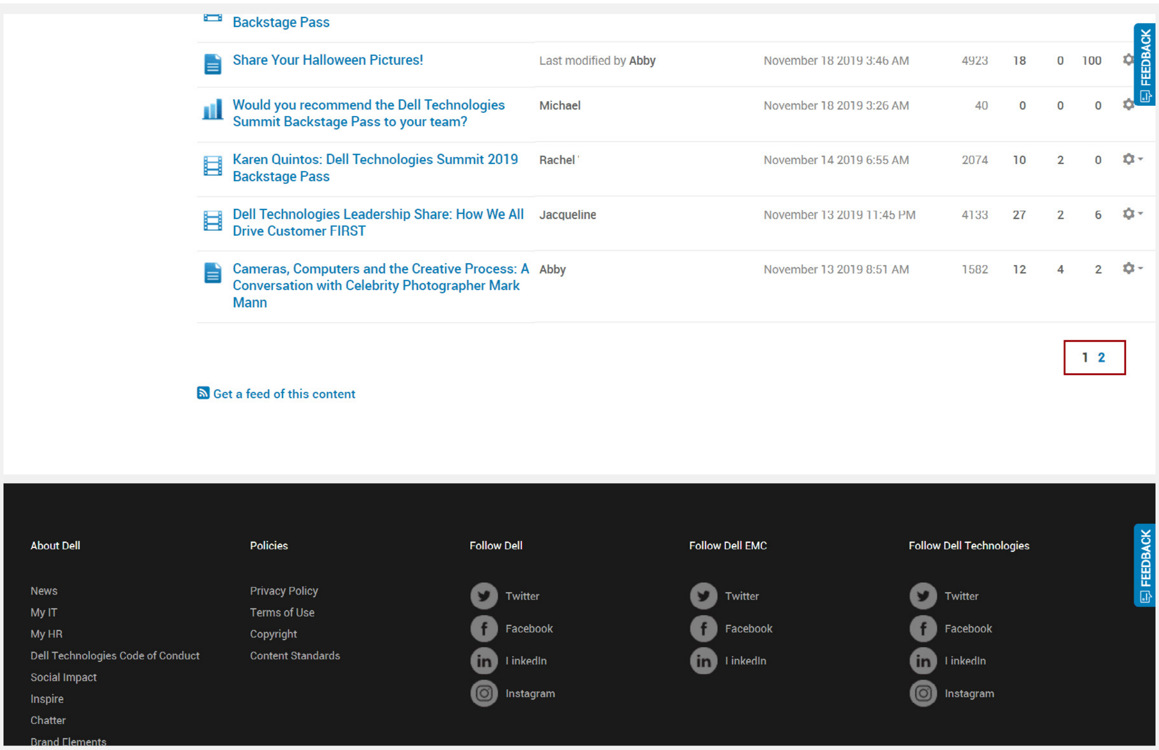
### Let the message determine the page length.

Process and Strategic Considerations

As part of their content creation processes, some intranet teams may wonder how long any given page should be. There's no specific rule or guideline for that because it depends on what you're writing about, who will be reading it, and their commitment level. What's more important is to decide what the key message or story is and let that determine the page length.

## 17. Use pagination to break up content at the category or page level and to help avoid overly long pages.

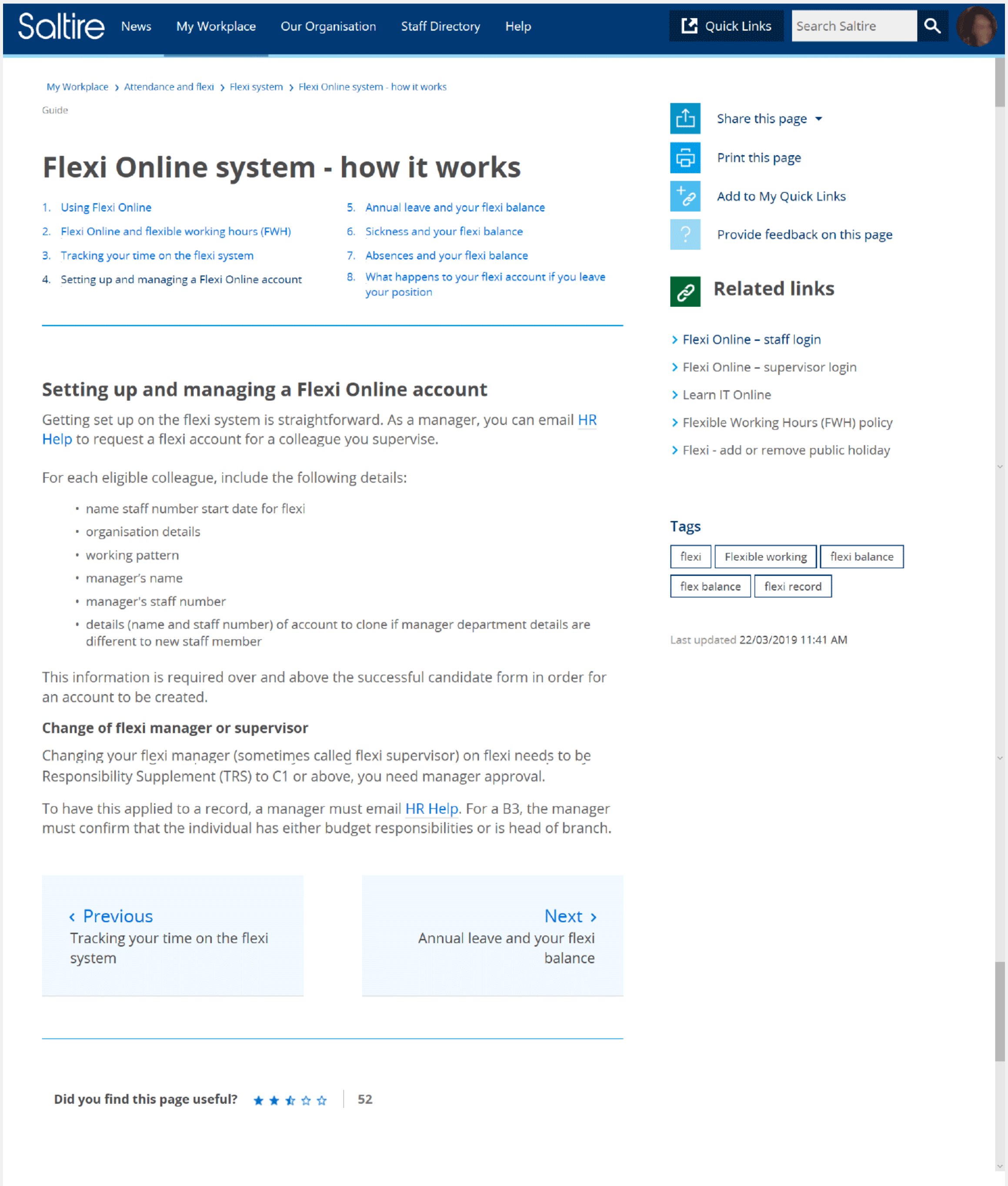
It's acceptable to organize intranet content at the category level for news articles or blog posts and then use pagination to help users look through multiple pages of content to find what they need. For example, on Dell's *All New* listing page, a pagination component in the bottom right helped users easily browse each page of news links. Without the pagination, this would have been an extremely long page of links to articles, forcing users to scroll excessively.




*Dell included a pagination component on its news listing page, which is an effective way to break up content into multiple pages so that individual pages don't become too long.*

Although pagination is helpful, we don't want to create extra work for employees by adding arbitrary pagination. Ensure you're keeping a coherent story on one page, not breaking it up needlessly, which leads to thin content. Don't take employees all over the place, to different intranet pages or even websites or subdomains.

Something like a *How-to…* article should be on one page. When trying to decide about pagination, ask yourself if you think people will want all of the information together in one place. If the answer is yes, don't make people do extra work, such as clicking or expanding content. The Scottish Government introduced arbitrary pagination on the page outlining its vacation and leave tracking system, *Flexi.* A better approach would have been to use other formatting and structuring techniques, such as anchor links and accordions, to help place all or most of the content on a single page rather than forcing users to click through multiple pages to understand how to use the system.



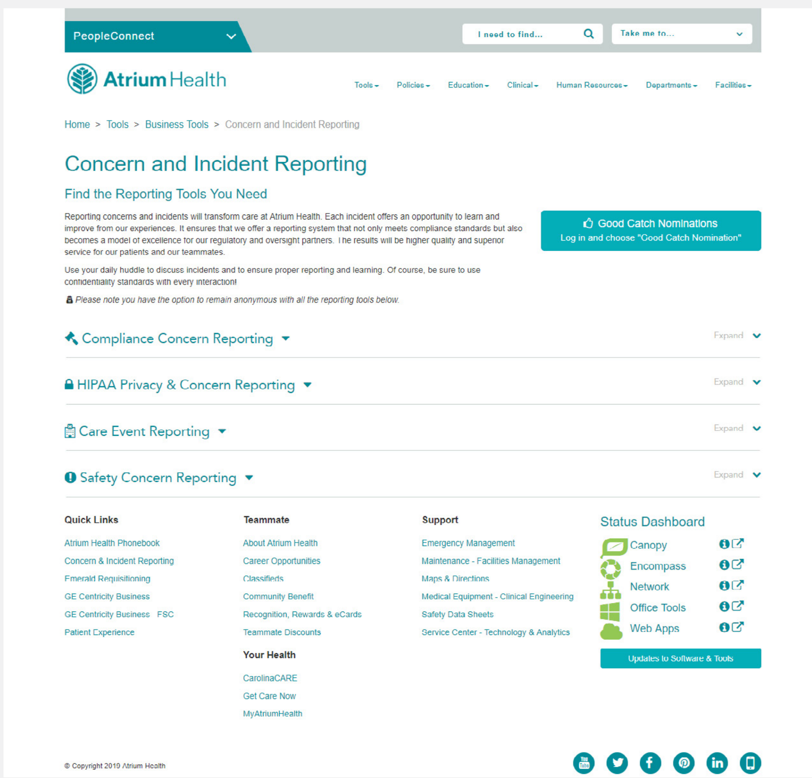

*This example from the Scottish Government's intranet shows how arbitrary pagination creates more work for employees as they have to click forward or backward through each page to find what they need. A more favorable approach would be to present the information in more logical content groupings on a single page or just a few pages and apply effective structuring and formatting techniques to ensure the quantity of content on a single page doesn't overwhelm users.*

## 18. Collapse content using accordions to fit more topics on the screen.

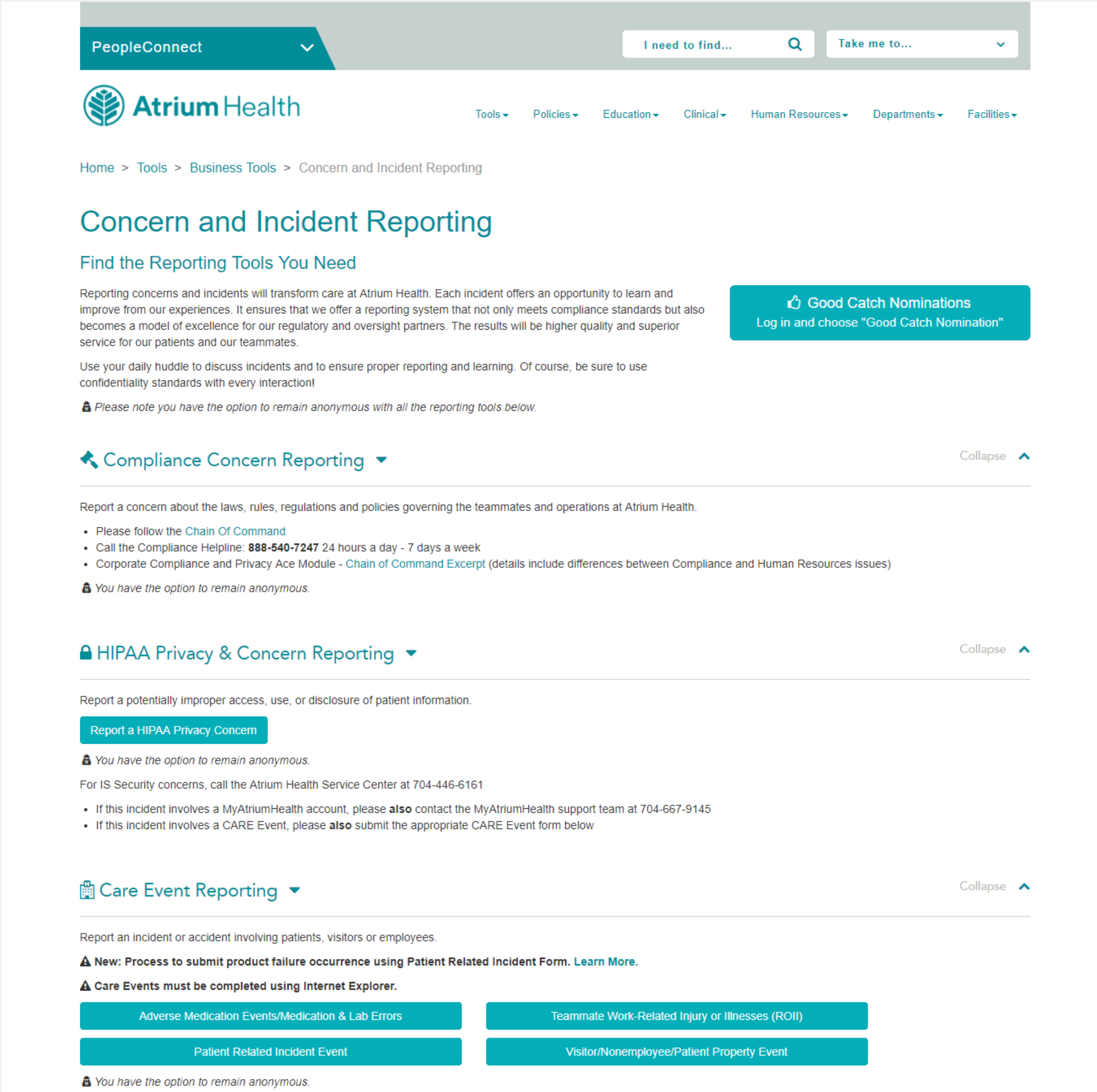
If you know employees will only want a few pieces of specific information from a longer page, then it might be a good use case for accordions. Accordions collapse content to help you fit more topics on a screen. They can make content less daunting to consume. This is especially true on mobile intranet views, as accordions help mobile users see the entirety of the content on the page.

Accordions are commonly used on *Frequently Asked Questions* pages. When you have reason to believe that people don't want access to *all* of the page content, just certain sections, it's acceptable to collapse content into accordions. This way, employees can quickly see what's available and find what they're looking for.

Atrium Health used accordions on its intranet's *Concern and Incident Reporting* page to collapse and organize the content related to different types of reporting. The only minor improvement to this approach would be for Atrium Health to include a link to *Expand All* or *Collapse* all accordions on the page with one click.

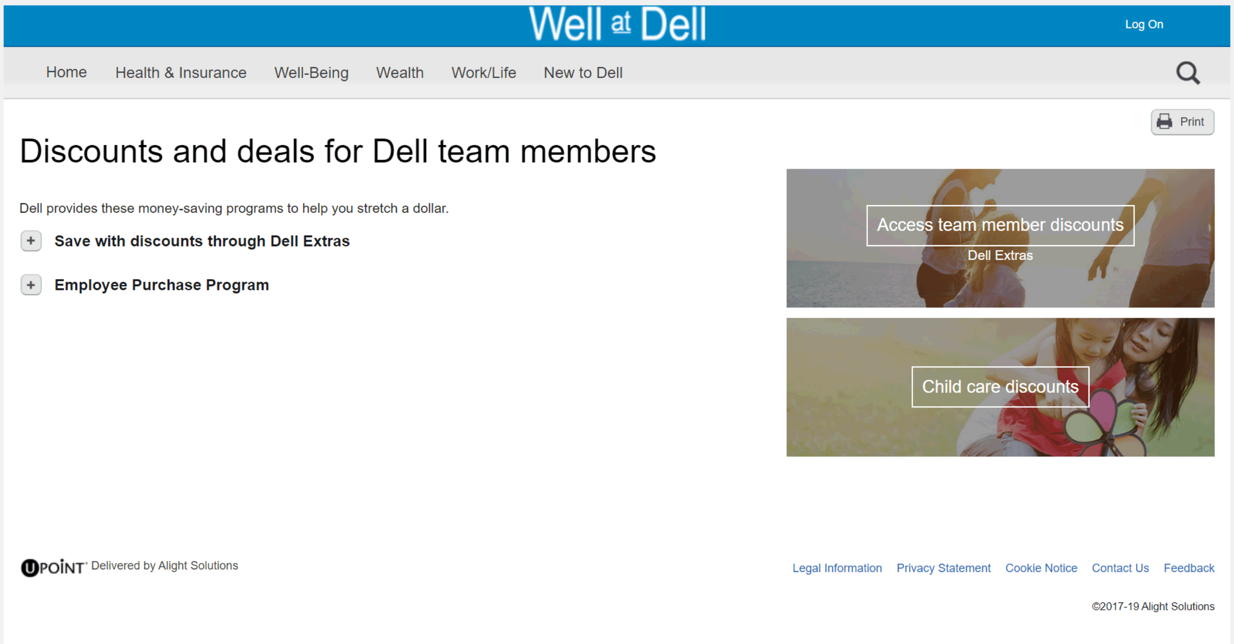



*Atrium Health intranet users typically arrive on the* Concern and Incident Reporting *page seeking information about a specific type of report. Thus, Atrium Health's use of accordions here represents a good example of using them to collapse and organize content.*

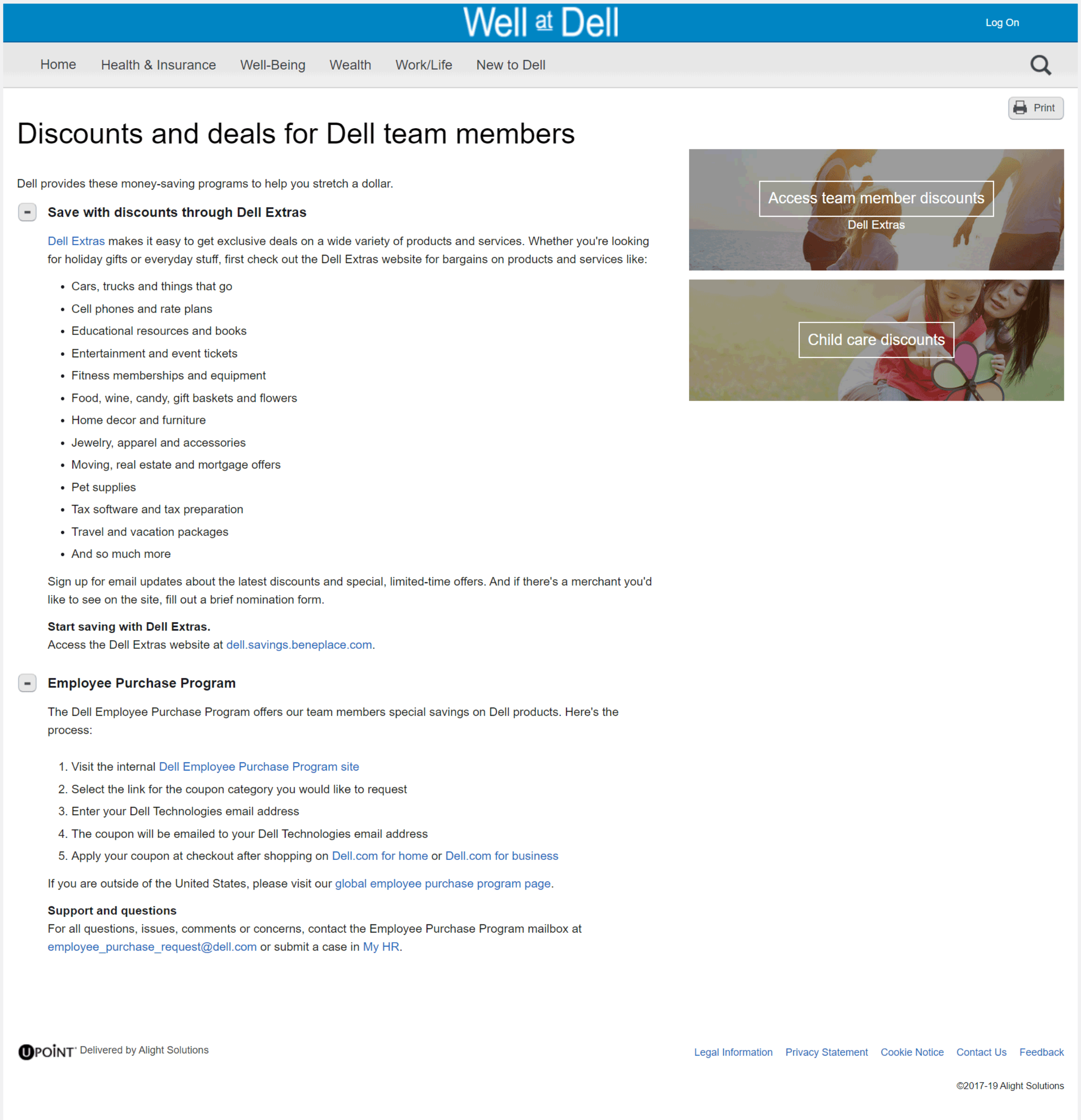



*In addition to having clear accordion labels which succinctly describe each type of incident reporting and whether the accordion is expanded or collapsed, the accordions also use the most favorable icon for this interactive component, an up arrow when expanded or a down arrow when collapsed.*

Accordions have many useful applications. However, if your employees intend to read multiple items on the page like users did when interacting with Dell's *Deals and Discounts* page, avoid using accordions and simply expose all of the content on the page and provide clear subheadings to separate paragraphs from one another. Here, on Dell's intranet, people wanted to read most, if not all, of the pages' sections sequentially, but they were collapsed with accordions. Having to open each accordion to read the content section by section created extra work for employees rather than saving them time. A better approach here would be to remove the accordions and simply list all the content on the page since there's plenty of room to do so.




*On Dell's* Discounts and Deals *page, needless accordions created more work for employees since these intranet users often wanted to interact with all of this content rather than individual pieces.*



Well at Dell

Log On

Home Health & Insurance Well-Being Wealth Work/Life New to Dell

Print

# Discounts and deals for Dell team members

Dell provides these money-saving programs to help you stretch a dollar.

**Save with discounts through Dell Extras**

Dell Extras makes it easy to get exclusive deals on a wide variety of products and services. Whether you're looking for holiday gifts or everyday stuff, first check out the Dell Extras website for bargains on products and services like:

- Cars, trucks and things that go
- Cell phones and rate plans
- Educational resources and books
- Entertainment and event tickets
- Fitness memberships and equipment
- Food, wine, candy, gift baskets and flowers
- Home decor and furniture
- Jewelry, apparel and accessories
- Moving, real estate and mortgage offers
- Pet supplies
- Tax software and tax preparation
- Travel and vacation packages
- And so much more

Sign up for email updates about the latest discounts and special, limited-time offers. And if there's a merchant you'd like to see on the site, fill out a brief nomination form.

**Start saving with Dell Extras.**
Access the Dell Extras website at dell.savings.beneplace.com.

**Employee Purchase Program**

The Dell Employee Purchase Program offers our team members special savings on Dell products. Here's the process:

1. Visit the internal Dell Employee Purchase Program site
2. Select the link for the coupon category you would like to request
3. Enter your Dell Technologies email address
4. The coupon will be emailed to your Dell Technologies email address
5. Apply your coupon at checkout after shopping on Dell.com for home or Dell.com for business

If you are outside of the United States, please visit our global employee purchase program page.

**Support and questions**
For all questions, issues, comments or concerns, contact the Employee Purchase Program mailbox at employee_purchase_request@dell.com or submit a case in My HR.

Access team member discounts
Dell Extras

Child care discounts

UPOINT Delivered by Alight Solutions

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*A better approach would be to expose this content and remove the accordions altogether. The subheadings, bulleted and numbered lists, chunking, links, and bolded keywords and phrases will help users traverse this content efficiently and, in its entirety, to help them find what they need.*

# Guidelines for Intranet Content Types

Each type of intranet content has its own unique lifecycle. The table below outlines how common organizational and employee goals map to content types and topics that best support those goals. We've also included lifecycle and format considerations to keep in mind, specifically what happens to content after it's published and how long it should live before it's reviewed, updated, moved to a more permanent section of the intranet, or retired. This table can also help you align your organization's goals and solidify standards for specific content types, including roles and responsibilities, publishing and update frequency, and retirement and removal processes.

It's important to note some content types may certainly be used to achieve other organizational, intranet, and user goals beyond where we have placed them in the table. (For example, using video for news stories and for onboarding).

**Intranet Content Types and Lifecycles Considerations**

| Organization's Intranet Goals | Employee Goals | Example Content Types & Topics | Lifecycle Considerations |
|---|---|---|---|
| Communicate where the organization is going in the future | • I want to understand where the organization is headed.<br>• I need to see how my work fits in and contributes.<br>• I need to feel motivated and feel like my job is secure. | • Vision, mission, and goals<br>• Key performance indicators and metrics<br>• Reports and results<br>• Culture-focused content | • This content can be displayed in a variety of formats.<br>• Update on a quarterly and annual basis. |
| Inform and create awareness about what's *currently* happening, internally and externally | • I want to know what's going on.<br>• I need to feel connected to the organization, and I need to stay connected.<br>• I need to know how activities and changes in the organization (or the outside world) impact my job and life. | • News and announcements<br>• Alerts and emergent info<br>• Events<br>• Video<br>• Email newsletters | • Usually, written text accompanied by images and videos.<br>• Update at least weekly or as necessary for developing stories.<br>• In time, some content may move to a new or existing section. If not, unpublish or archive after one year. |

| | | | |
|---|---|---|---|
| Provide resources and tools purposefully organized for and by departments and teams | • I want to know what's going on with tangential locations and teams.<br>• I want to know exactly where to go to find an answer or solve a problem.<br>• I want to be efficient and productive with my time. | • Landing or category pages<br>• Company locations, departments, and team spaces<br>• Collaboration tools | • This content can be displayed in a variety of formats.<br>• Offer a descriptive overview, links to relevant pages, and other resources.<br>• Monitor monthly, but review and update at least annually. |
| Foster familiarity and collaboration among teams, peers, and leaders | • I want to get to know the people I work for and with.<br>• I want to feel connected to the people I work with. | • People profiles, leadership bios, and org charts<br>• Blogs, social tools, interest groups | • Usually includes written text and photos of people, teams, and topics.<br>• Monitor, groom, and update as needed, or at least monthly. |
| Support inclusive employee and organizational wellbeing | • I want to know what my organization expects of me.<br>• I need to know how to be successful in my role.<br>• I want to feel like my organization and peers care, recognize, and value me. | • Onboarding, employee handbooks, forms, and policies (time off, benefits, annual reviews, travel and expense policies, etc.)<br>• Learning opportunities and ongoing career development<br>• Examples include benefits, cafeteria menus, fitness and wellness, recognition programs, etc.<br>• Comments and feedback mechanisms<br>• Translation and localization of content | • Usually includes written text, photos or images, documents, and interactive content formats.<br>• Monitor, groom, and update as needed, or at least monthly, for new insights and trends.<br>• In some cases, changes or new factors related to these goals can trigger the creation of new content, news, or announcements, thus beginning the content lifecycle all over again. |

Though we won't provide specific guidelines for every content type outlined in the table, we will provide several guidelines for the most important content types and those most often included on intranets.

## 19. Prioritize content that helps employees understand the organization's goals, aspirations, and culture.

Employees want to feel that the organization they work for has a strong vision, mission, and goals. They also want to see how their work contributes favorably to those goals and how it is helping move the organization in the right direction. As such, the intranet is a great place to house content related to the organization's vision, mission, and goals. Employees should feel informed, aware, and motivated by interacting with this content. If done poorly, this content can cause employees to disengage and lose trust in the organization.

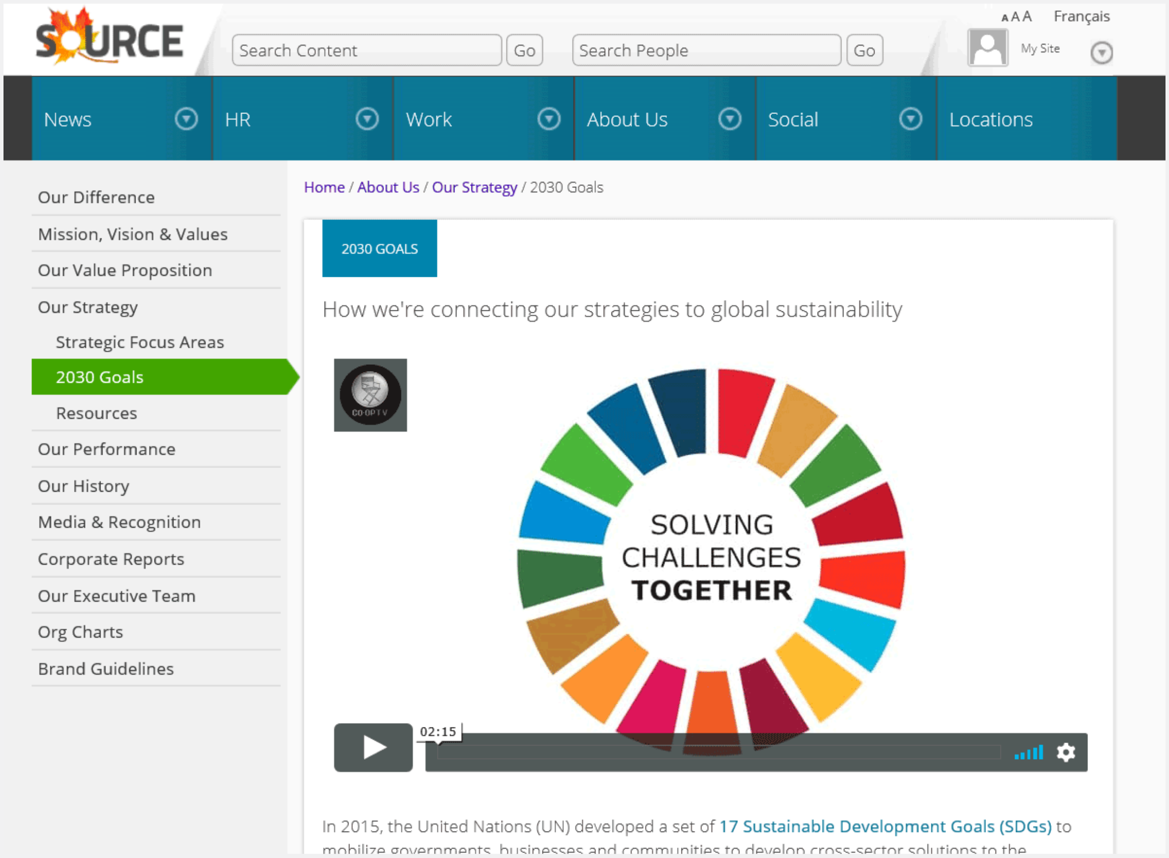
There are many different ways to organize and present this content. In larger organizations, it might encompass an entire navigational category, with a main landing page and subcategory pages underneath, or in smaller organizations, it may be a single landing page.

Focus on these key details when creating this type of content:

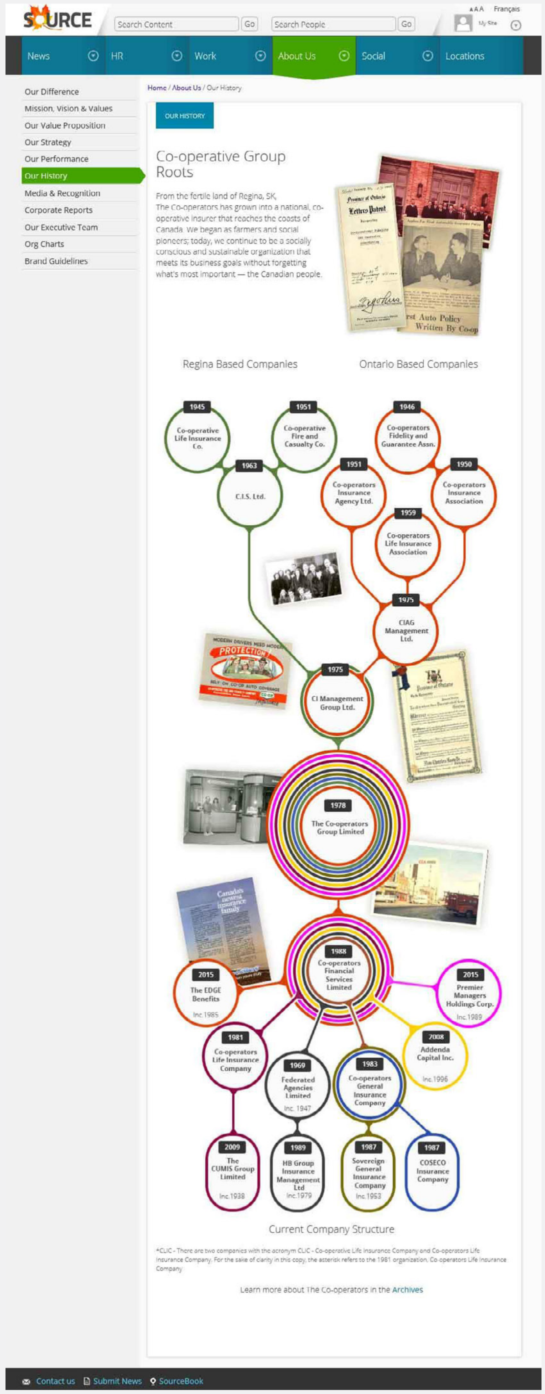
- **Vision, mission, and goals:** Where does the organization intend to go in the future, how can employees live out the vision in their day-to-day work, and what goals are the organization seeking to achieve and why?
- **Key performance indicators and success metrics**: What metrics should employees care about and use to gauge whether the organization is meeting its stated goals? Explain these in this section of the intranet.
- **Reports and results:** Beyond just stating metrics, share how the organization progresses toward those goals over time. Many organizations we studied shared these quarterly or on a bi-annual or annual basis, and employees appreciated the transparency.
- **Culture-focused content:** This content can and should encompass everything from the organization's history to current perspectives on important topics such as diversity and inclusion, corporate social responsibility, and more.

For example, the Co-operators dedicated an entire section of its intranet to the organization's vision, mission, and strategy. It housed this content in the *About Us* section and used an impactful two-minute video to communicate its vision.

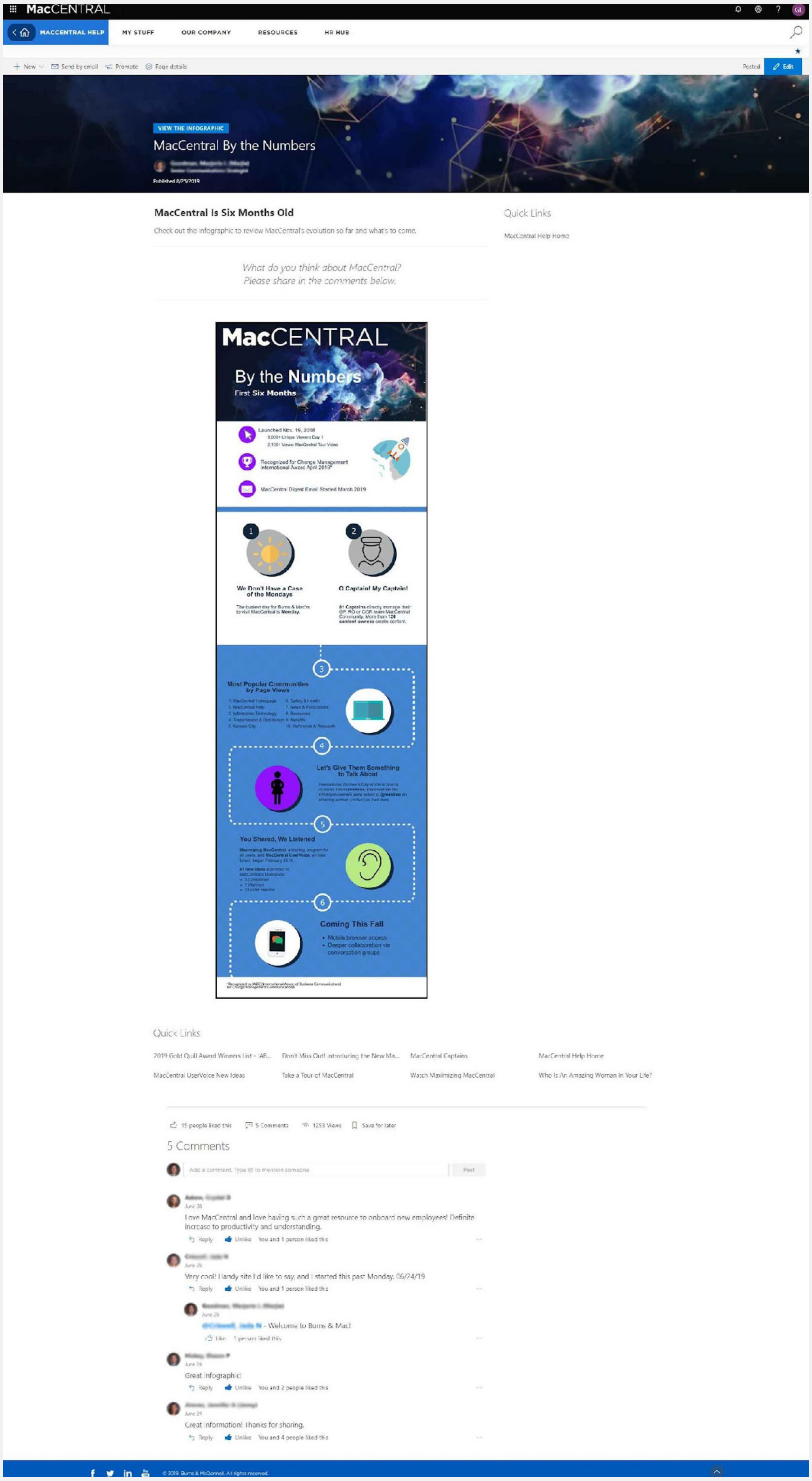
Other noteworthy content subcategories in this section included *Our Difference*, *2030 Goals*, and *Our Performance*. A subcategory in the company's history helped employees understand how the organization got its start and how it evolved over the years. The engaging format told the story in a way that uniquely tied the history of where the company had been with where it intended to go in the future, which was favorable.




*The Co-operators dedicated an entire section of its intranet to the organization's strategic direction and culture.*




*The Co-operators used an engaging infographic to communicate information about the organization's history and evolution.*




*Burns & McDonnell also used an engaging infographic to communicate the history of the intranet.*

It's usually best if a corporate communication team or a central intranet team, in partnership with leadership, owns this content so they can ensure its continually monitored and updated, as needed. Usually, content such as the organization's history, mission, and values won't change much over time, but the company's vision, goals, metrics, and results may vary slightly from year to year. Regardless, review this content at least annually to identify any needed updates, additions, or outdated content that should be removed. It's especially important to review and update this content before the first of the year so that employees can embark on the new year with a fresh vision and set of goals to work toward.

## NEWS, ANNOUNCEMENTS, AND EMAILS

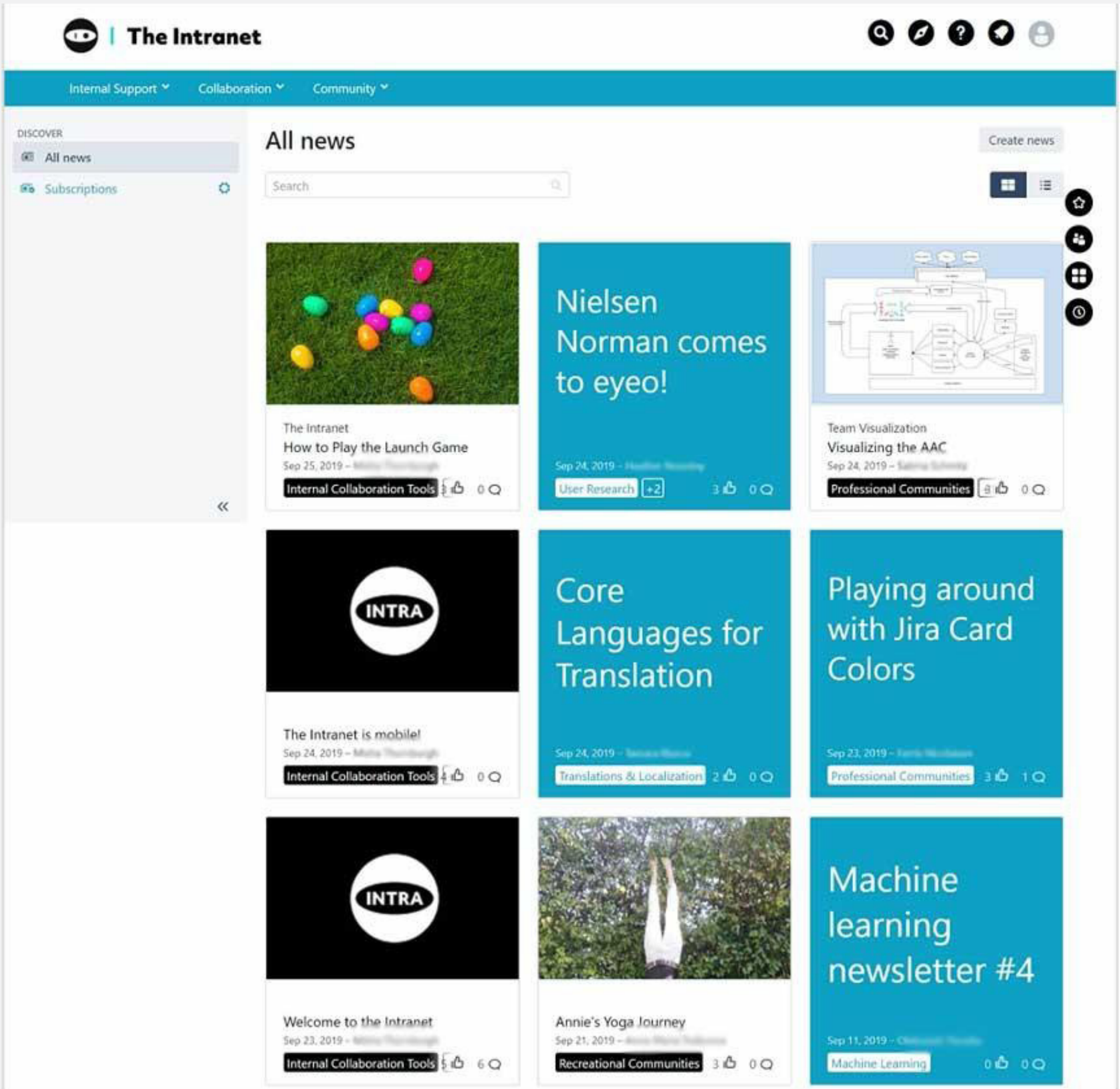
### 20. Include an area where employees can go to see all news.

News is one of the most important content types on an intranet. Ideally, it helps employees understand what's happening inside the organization and how external factors impact it and its people. When done well, news helps employees feel and stay connected to the organization and tells people how any good news, bad news, projects, or changes will impact their jobs and lives.

An intranet can display news in many different formats and through various combinations of communication tactics. It may be a long-form article with text and images, shorter snippets or announcements, videos, or some combination of these elements. The most noteworthy news may even warrant its own company-wide event. Intranet news is often coupled with awareness and traffic-driving tactics, such as alerts and email newsletters. Because news can be displayed in multifaceted ways, it's important to provide one location where employees can reliably find all news.

At Eyeo GmbH, the central location where employees could view all news and announcements was rightly named *Eyeo Central*. From here, employees could subscribe to receive email alerts for certain types and categories of news that interested them most. A scoped search in this section allowed employees to search only within news. For approved content creators, a contextually relevant link to *Create News* also appeared on this page, making it quick and easy to publish a new piece.

In *Eyeo Central*, each piece of news displayed in chronological order and included an image, headline, date, and author. Users could also quickly react with a *Like*, see the number of comments, and topic tags assigned to each news article. These details help to make this a favorable approach to displaying all company news on an intranet.



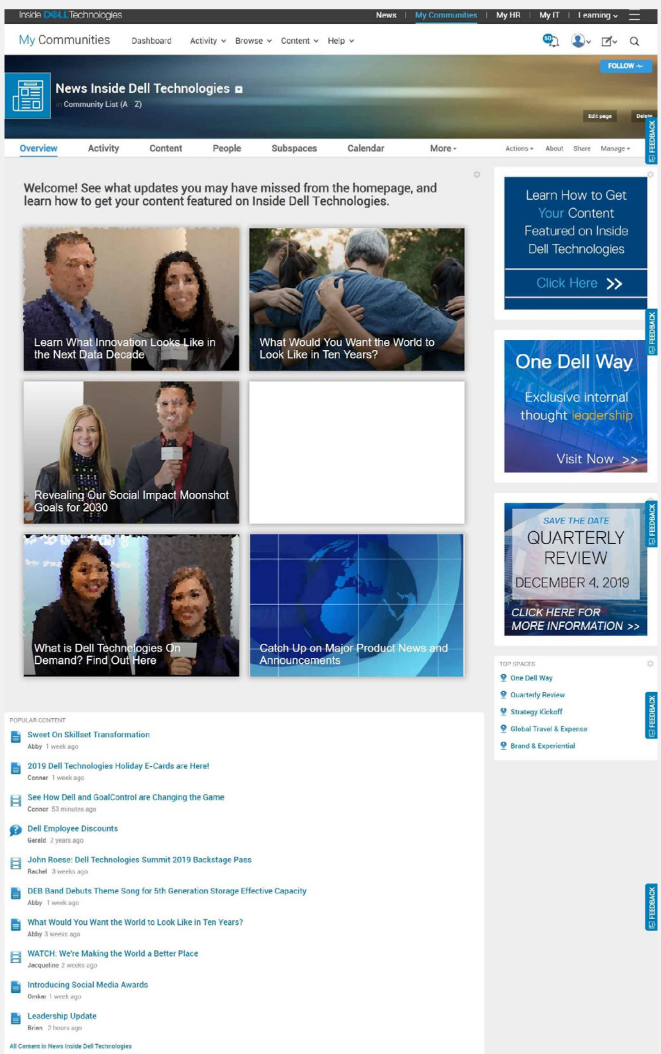

*Eyeo GmbH's intranet included* Eyeo Central*, a helpful one-stop shop for viewing all news on its intranet.*

Dell's intranet included a destination where employees could see all news, but the path to finding it and the language used in the navigation and on this section's main page were confusing. When users tried to view all news, they were taken to a section labeled, *My Communities* rather than staying in the *News* area of the intranet. It caused disorientation when users initially saw *News* in the navigation, but *My Communities* was suddenly highlighted instead. To add even more confusion, the main headline on the page said, *News Inside Dell Technologies*, which made people question where they were, if they were in the right place, or if there was another more suitable area for viewing all news on the intranet.

One employee said, “So if you click on *see more news*, I thought that the news was going to appear in a list . . . it changes from news to *My Communities*, so it’s a little misleading.”

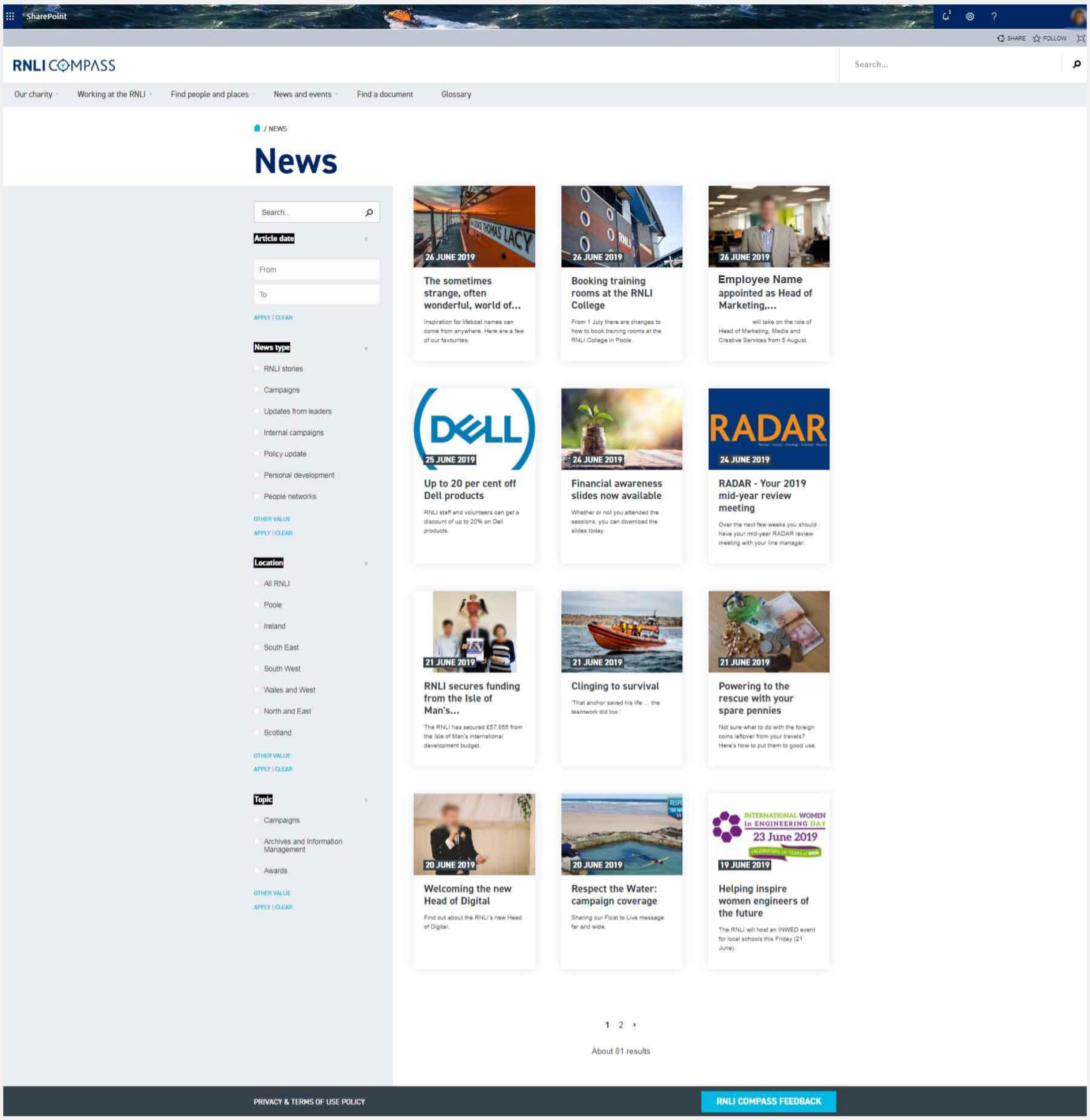
Another employee said, “It should be kind of like what all the news looks like on all other web pages. I know with MSN, it does that. If you click on news, it goes to the news, but here it went to communities versus more news.”

A better approach would be for Dell to create an *All News* page in the *News* area of the intranet, which would keep that navigational area highlighted when users landed there. The page could list all news articles in chronological order, so users could easily find older news, and the area could be linked to from the *News* link in the global navigation and the *All News* link, which appeared next to the featured news on the homepage.



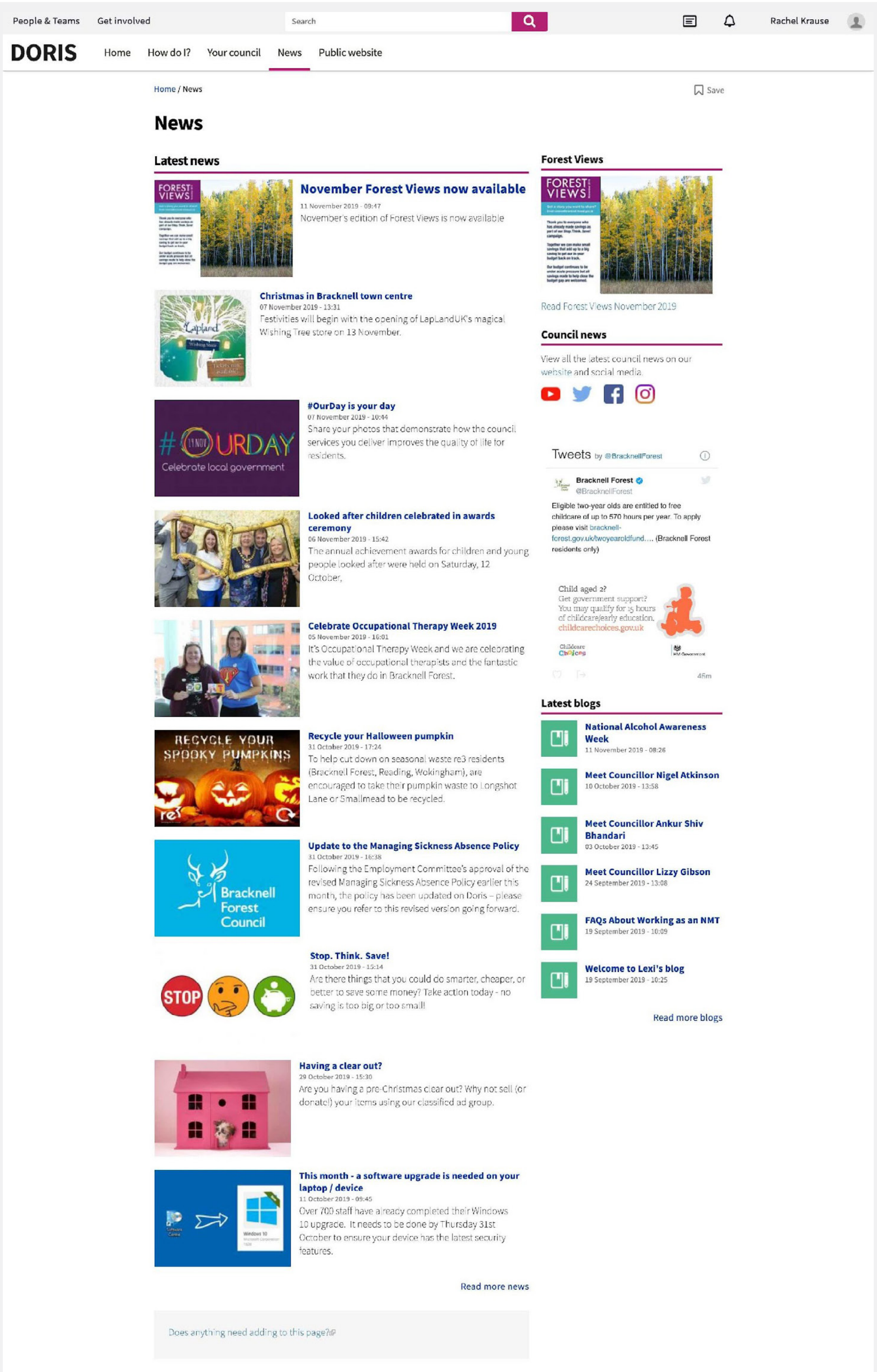

*Employees at Dell were confused when they clicked* All News, *and the landing page said* My Communities *in various places instead of keeping users in the News section to view all news.*

Employees at the Royal National Lifeboat Institution had much more success finding all news, and the users we tested with located the latest news from the main *News* page. The page was accessible from a *news* widget on the homepage and the *News and Events* section of the navigation.




*The Royal National Lifeboat Institution's main* News *page was easily accessible from a news widget on the homepage, and the* News and events *link in the main navigation. Once here, all users successfully found the latest news.*

Bracknell Forest Council's *All News* page was also easily accessible from the main navigation. Once there, employees could see an aggregation of all news types and formats from across the organization.




*Bracknell Forest Council's* News *page allowed employees to easily see all news in various formats from all across the organization.*

### Set an appropriate schedule and frequency for updating news.

**Process and Strategic Considerations**

The frequency with which you update news on the intranet will largely depend on the content-management model you're following. Intranets following a distributed content-management model, where employees can freely contribute and post news, may have an abundance of new news all the time. In contrast, intranets that use a centralized content-management model may only post three to five fresh news stories each week, all created and published by the intranet team.

In a hybrid model, some news may be created and published by a central team, while other pieces come from contributors across the organization. These contributors are often required to adhere to specific requirements, formats, and approval processes before news is published, which can provide a nice balance between the quantity of news and the quality of the content.

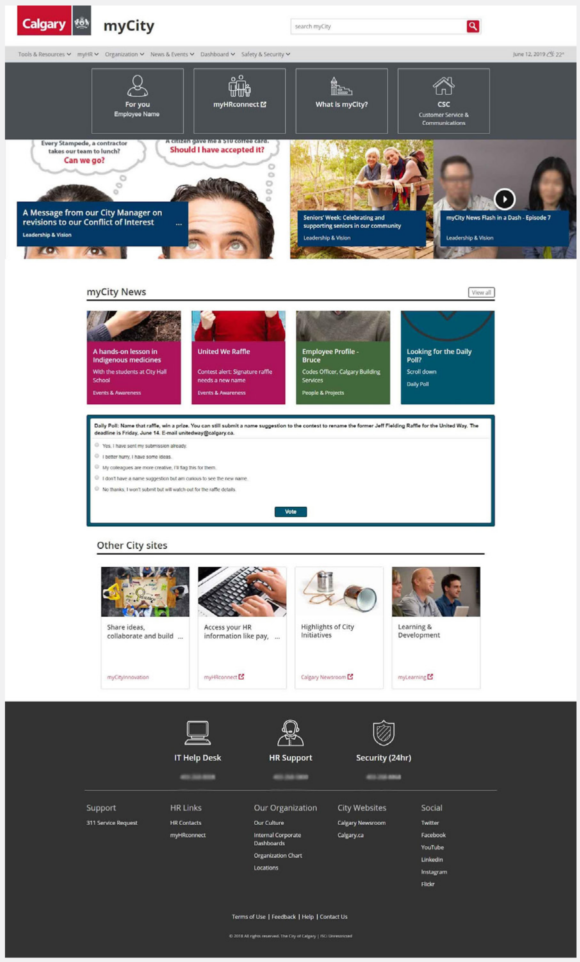
No matter the approach, aim to update news on the intranet approximately once a week or more often for emergent or developing news. After one year, either move news stories to an archive, where the intranet's search function can't index them, move them to a contextually relevant area, or unpublish them to make room for newer, more relevant news.

## 21. Place the most recent and important news on the intranet's homepage with a link to *View all news*.

Employees often have the intranet's homepage set as their browser's home screen, so it's usually the first thing they see when they open a browser window on their work computer. The intranet's homepage often serves as a jumping-off point to deeper areas of the intranet, regardless of whether it's set as the browser's home screen. As such, post the latest and most important news as a prominent fixture on the intranet's homepage. This way, it's easy for employees to browse the news but also notice when it has changed. Offering a contextually relevant link to *View all news* from the homepage also ensures employees can quickly and easily find older stories that may still be needed or relevant to them.

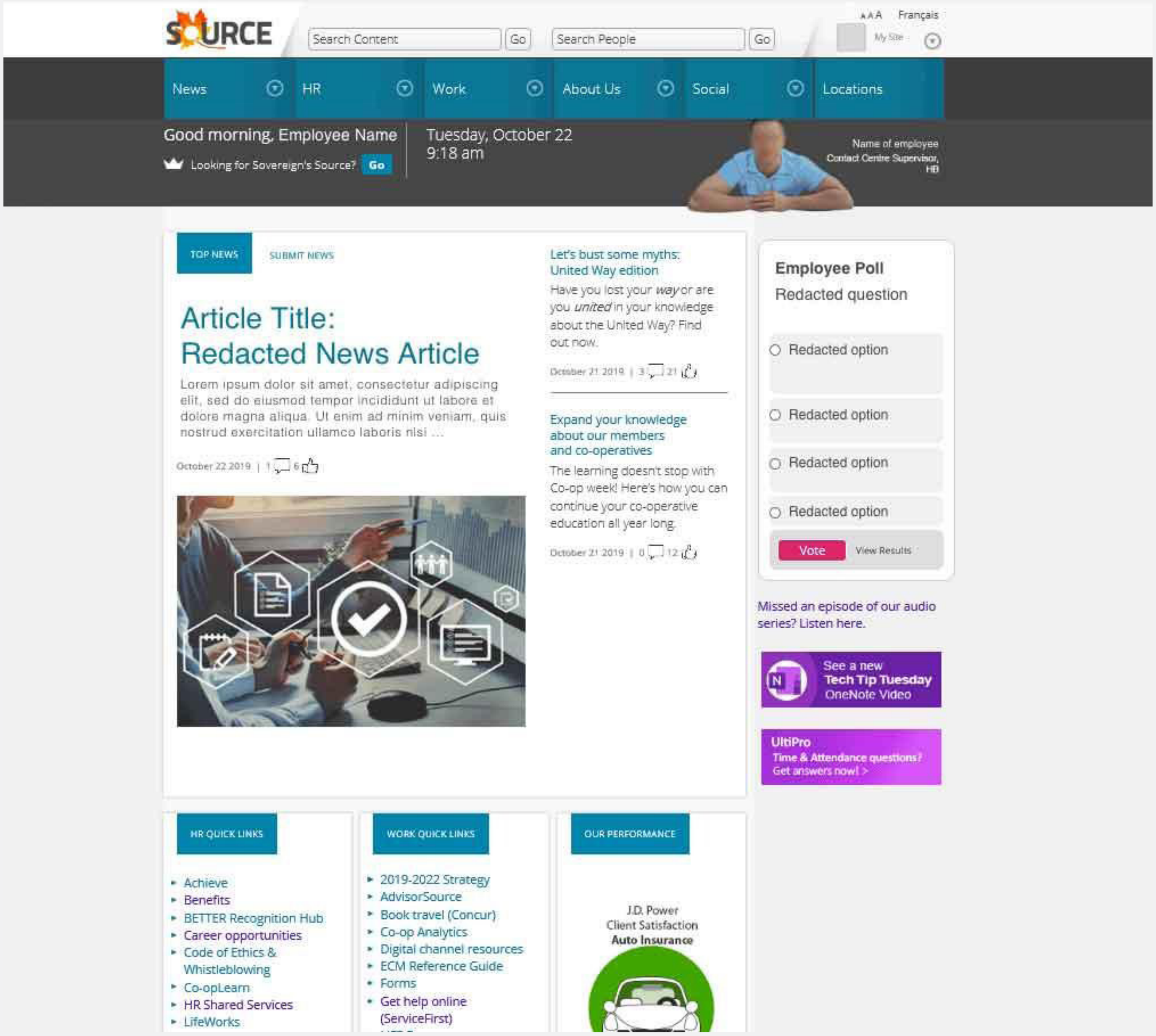
The City of Calgary's intranet included a homepage news section with a link to *View all news*. One employee said of the section:

"It's one of the things I look at and click on. The first thing I usually do is see if anything is new that jumps out from the previous day. Typically, what I do is scroll to see if there's anything that jumps out or is of interest to me to read. For example, I am pretty sure I've met or worked with Bruce before, and I read his profile yesterday, but I don't really pay attention to daily polls because I just don't have time for that."




*The City of Calgary placed news front and center on the homepage of its intranet, which was favorable. The homepage featured a link to* View all, *giving employees a quick and easy way to view more news beyond what was featured.*

Many users we studied at the Co-operators reported regularly reading the three news items featured on the intranet's homepage. Employees also perceived these to be the most recent news available. One user said, "I always look at these three on the homepage for the latest news." However, this homepage section lacked a contextual link for employees to see *All News*, which would be an easy element for the Co-operators to add to this section.




*Employees at the Co-operators read the news featured on the intranet's homepage. The component didn't contain a link to* view all news*; however, the first category in the main navigation led users there.*

### Display news articles in chronological order.

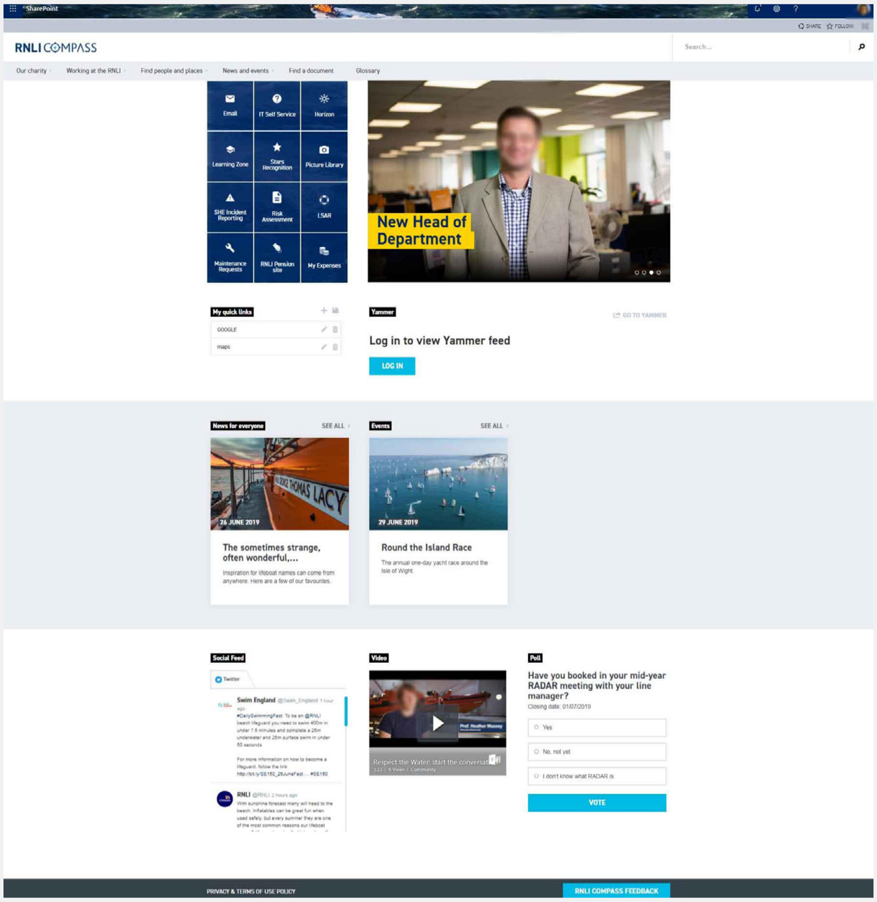
Timeless Design Tips

Users often assumed that the news featured on the intranet's homepage was the latest. To remove any question around which piece or pieces of news are the latest, always display dates alongside each news article, wherever they appear on the intranet.

When an employee noticed that news articles weren't displayed with dates and sorted chronologically at one organization, she said, "I don't know why these are not in the order of latest. Maybe I don't have them sorted that way . . . I don't know if I have the latest and greatest. I missed some stuff last week; I was on vacation."

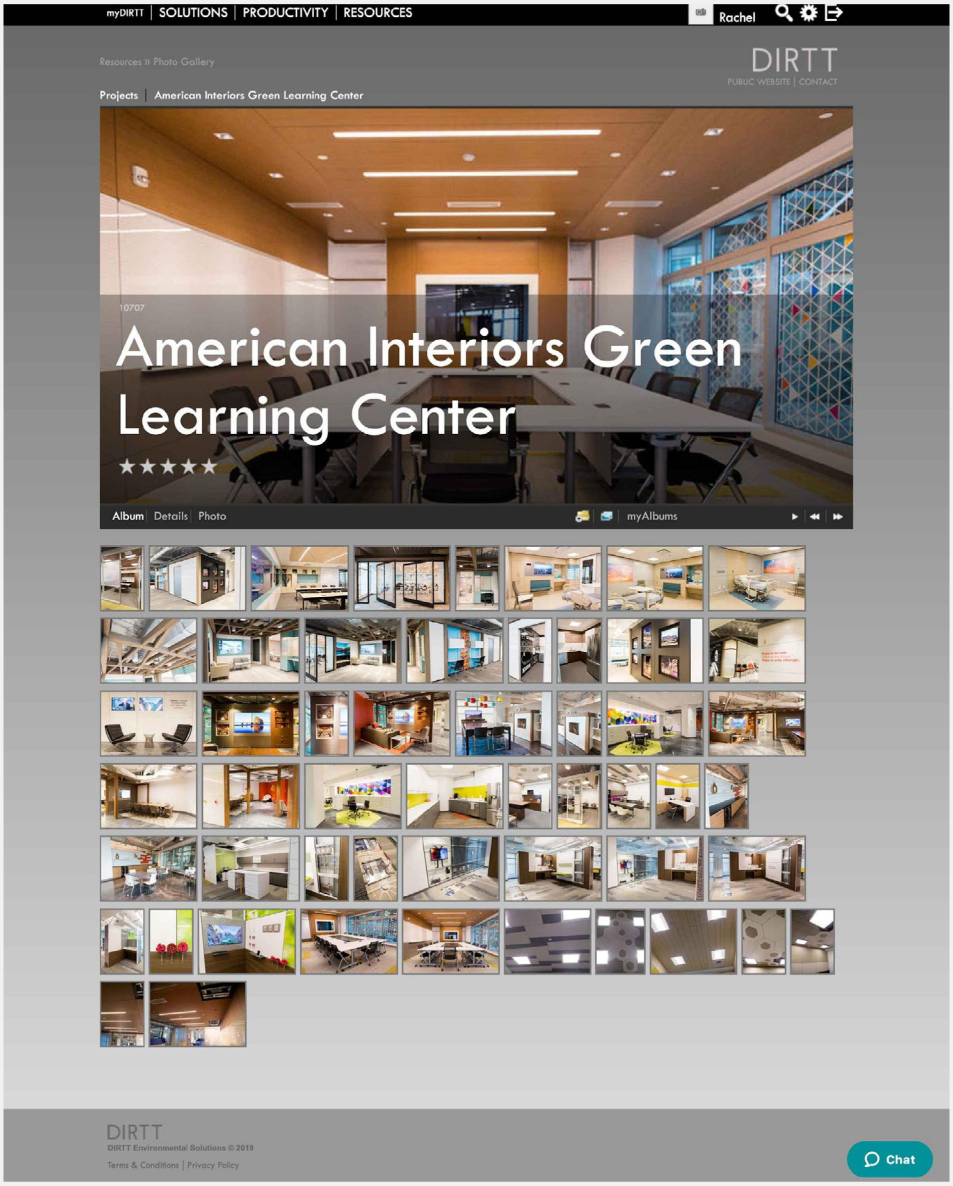
Don't make employees guess. When possible, display the news in chronological order.

Most users located the latest news from the homepage at the Royal National Lifeboat Institution. They scrolled down the page to the news widget and selected the *See All* link. A few users favored using the *News and events* link in the main navigation to see more news than what was featured on the homepage, so having both was an optimal approach.




*By featuring only one or two impactful news stories and events at a time on its intranet's homepage, the Royal National Lifeboat protected employees from content overload. The links to* See all news and events *alongside these widgets, coupled with the similar link in the main navigation, were consistent and favorable.*

Employees we studied at DIRTT said they enjoyed reading news stories and flipping through photo galleries about specific projects happening at the organization. Users always wanted to understand more about how different projects impacted and benefitted the company. One user said, "We have all of these projects going on. The intranet does a lot through our project galleries to help everyone understand what projects have been completed, and the scope of the impact around what it is that we do."




*DIRTT used visually engaging case studies and photo galleries on its intranet to communicate about the various projects happening or completed at the organization.*

### Focus on news topics that matter most and truly interest employees.

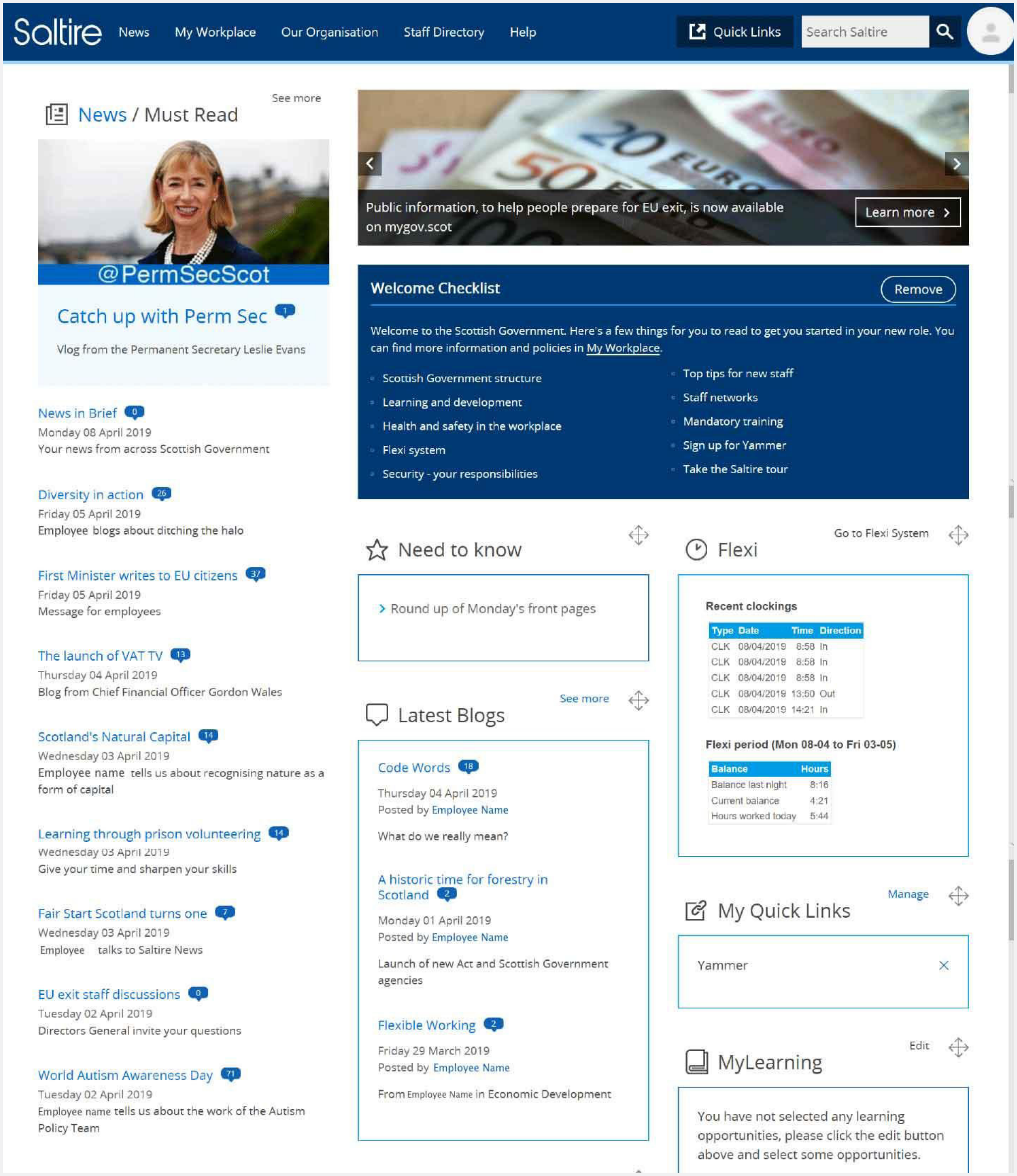
**Process and Strategic Considerations**

Aim for quality news over quantity of news. Employees we studied liked to see positive news about their company on the intranet. They described stories highlighting awards won and TV commercials and ads produced as fun and enjoyable news that fostered a sense of pride.

Employees at another organization liked to read news about its corporate history, volunteer opportunities, and role-related news such as new resources and tools, services, or training opportunities.

Consider prioritizing corporate news efforts in these areas to keep the news focused on what employees truly want and need. Ask employees what types of news they often read and monitor analytics data to understand the types of news employees engage with the most. Doing so will help drive ongoing interest and engagement with news on the intranet.

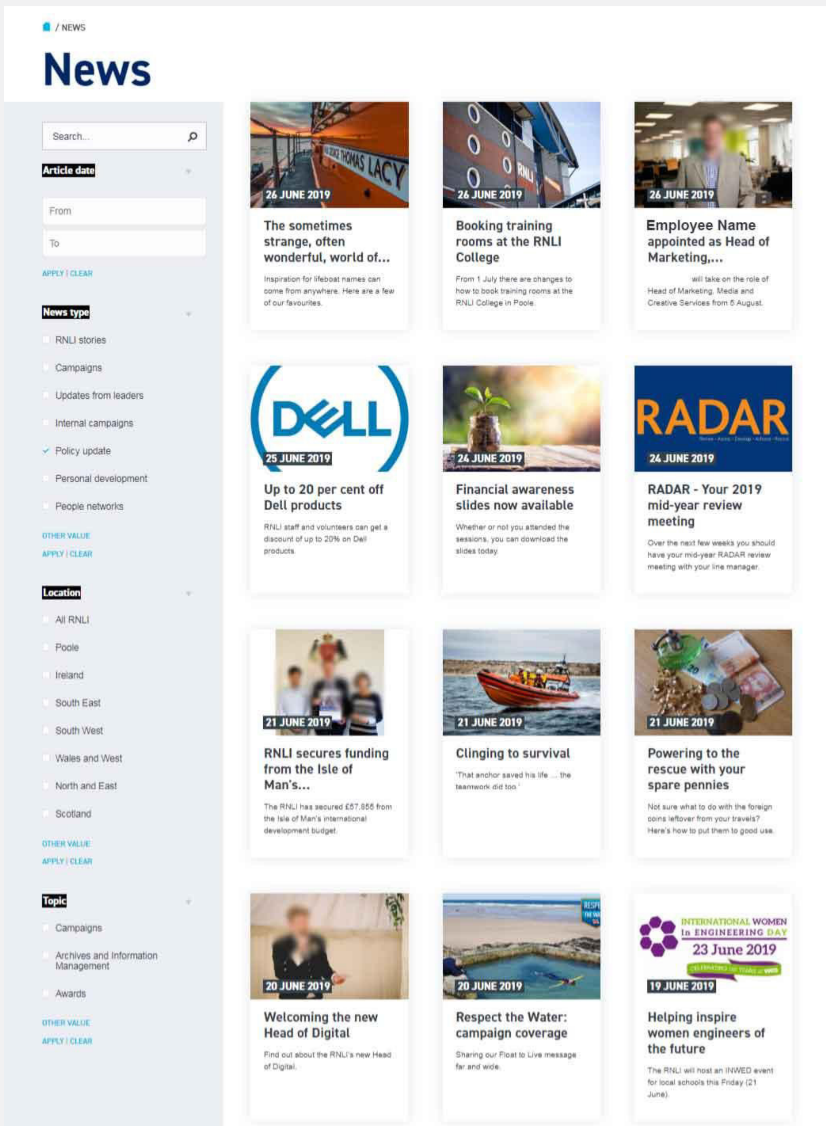
Most employees commonly read intranet news at the Scottish Government. Those we studied commented that they often read the news featured in the homepage component in the top-left corner. A *See more* link allowed employees to access even more news beyond what was featured.



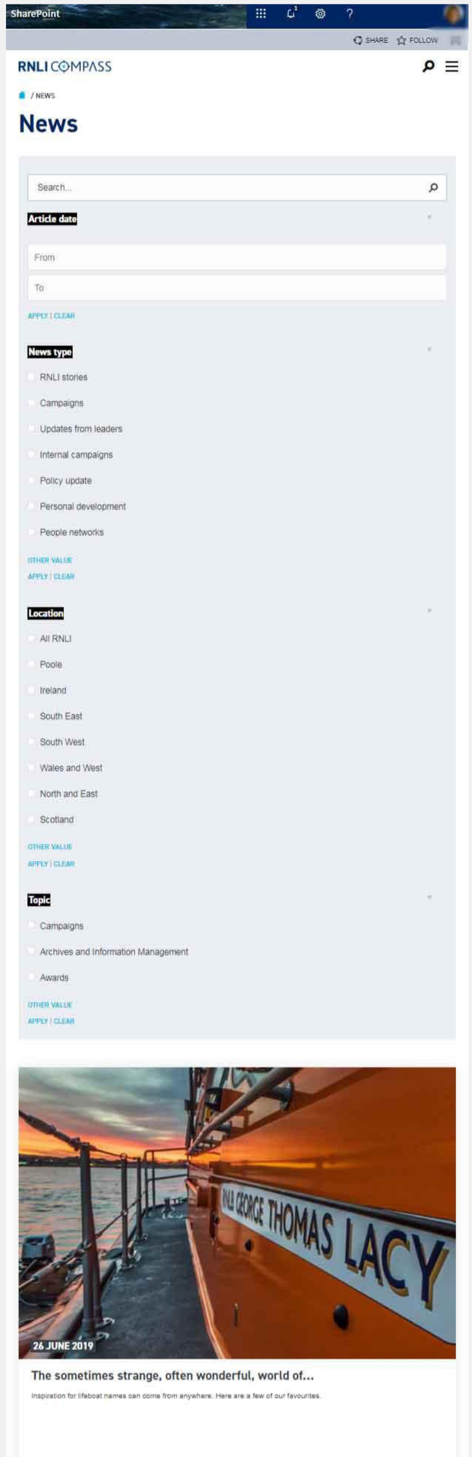

*Employees at the Scottish Government commonly read the news from the widget that appeared in the upper left corner of the intranet's homepage. A link to* See all *took users to the main landing page with all news featured.*

## 22. Include meaningful news filters on the main news landing page.

Providing filters on the main news landing page ensures employees can view only the news articles that match their information-seeking need, which might include a topic of interest, date range, company location, or other criteria. News filters can be especially useful for intranets at large organizations, where there's abundant news published. Employees had the smoothest experience interacting with news filters that appeared as checkboxes down the left side of the page. At the Royal National Lifeboat Institution, the ability to filter by date and the inclusion of dates on news content helped users feel more confident that they were accessing the most recent news. Other helpful filters, such as news type and location, also appeared.



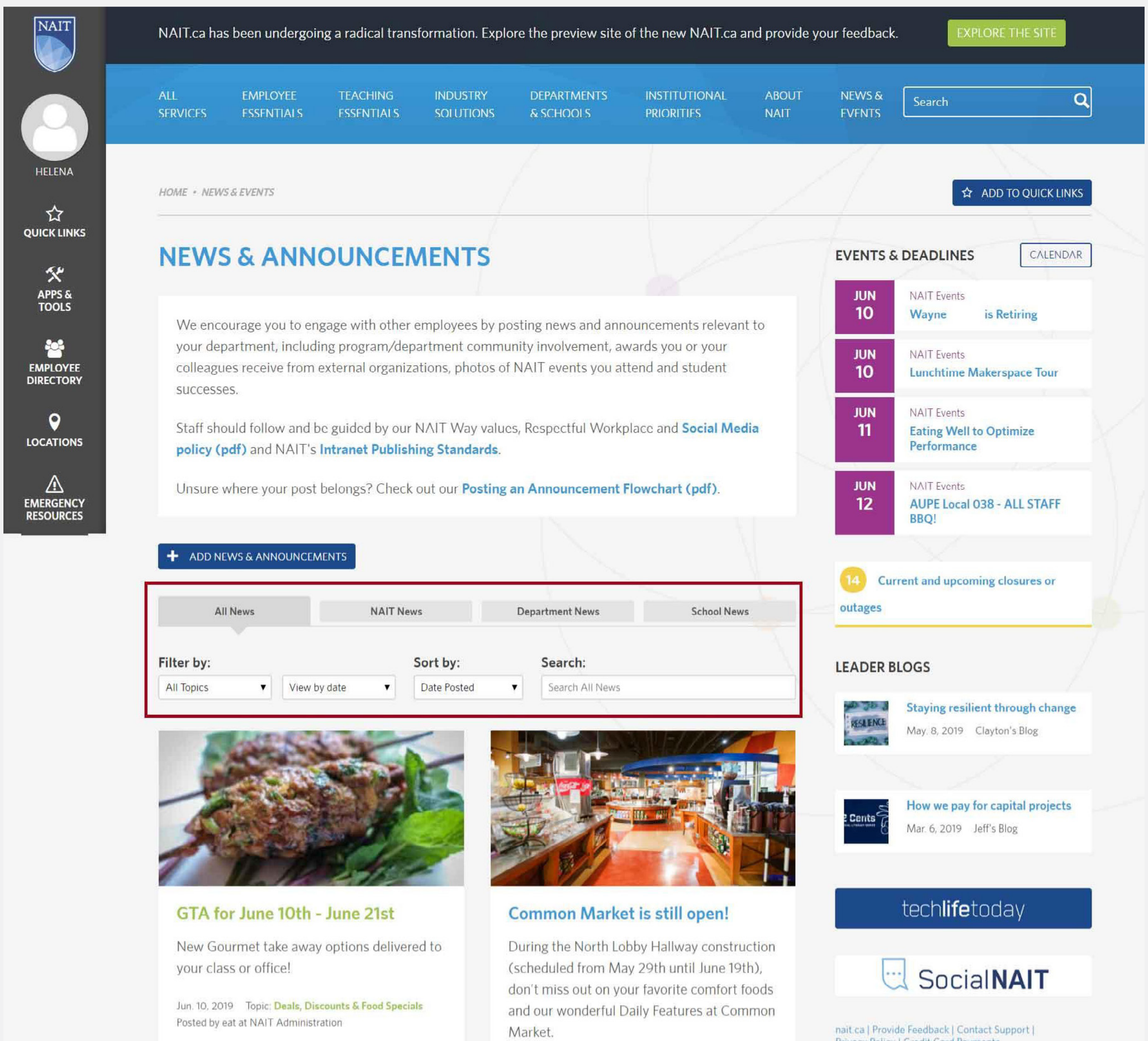

*News filters on the Royal National Lifeboat institution's intranet enabled employees to view only the news stories that interested them.*




*The Royal National Lifeboat Institution's news filters took up too much room on mobile. They obstructed the news entirely and forced employees to conduct a lengthy scroll. A better approach would be to collapse the filters into an expandable accordion, allowing employees to access news faster on mobile.*

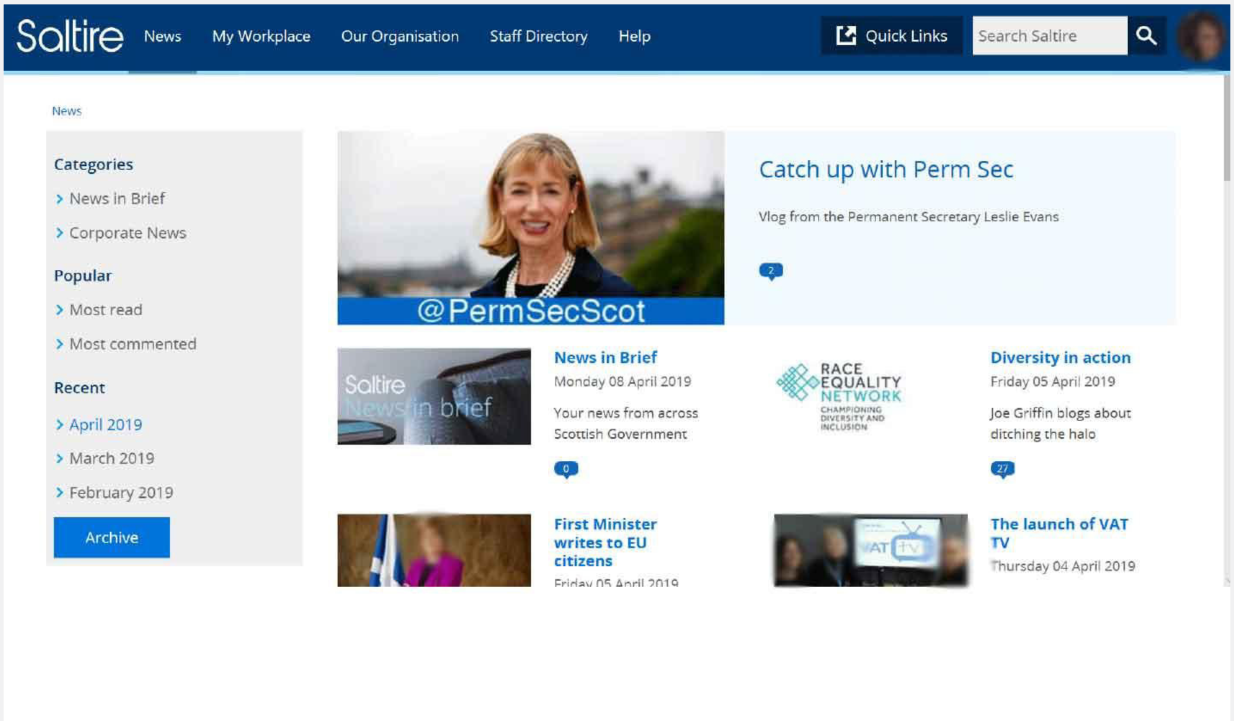
At the Northern Alberta Institute of Technology, news categories, filters, and sorting options on the main *News* page were redundant and confusing. One user interacting with the page said, "It's like a double filter which is a little weird. If this were a pull-down menu under this search, that would make more sense to me. I might have missed that, and I would have ended up with the wrong article."

Users had the option to filter via grey tabs at the top of the page for a news type, including *All News*, *NAIT News*, *Department News*, and *School News*, and a second layer of filters appeared below those tabs, along with a sorting dropdown and scoped search field. The abundance of filtering options confused users and created apprehension about how applying one or another would affect the news results. In this case, a better approach would be to remove the redundant filter options and expose the filters as checkboxes down the left side of the page.




*The Northern Alberta Institute of Technology had too many types of filters on its* News and Announcements *landing page.*

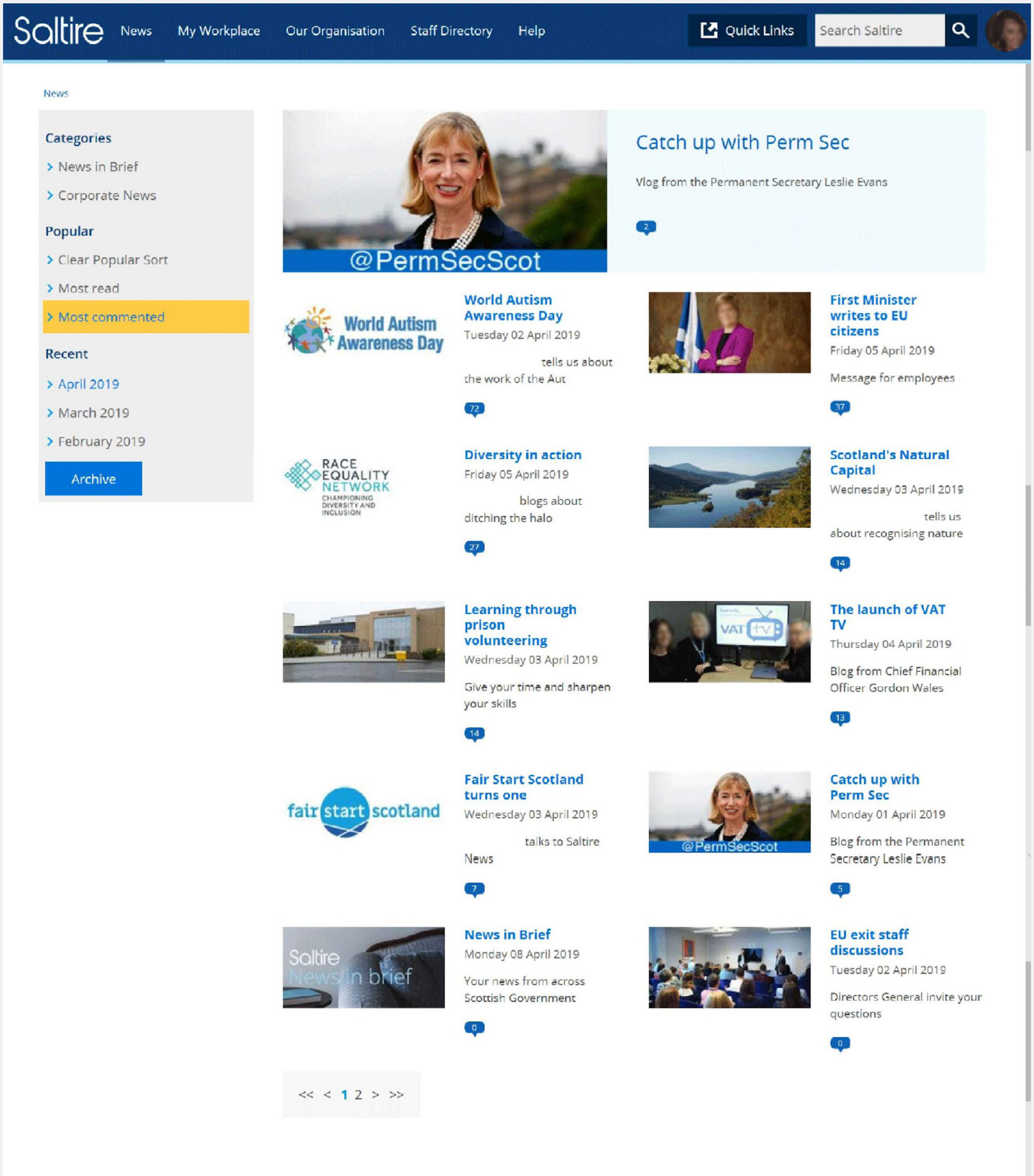
On the Scottish Government's *News* page, the filters appeared on the left side and simply included *Categories*, *Popular*, and *Recent* as criteria. While this was favorable, the functionality of the filters was nontraditional, and users struggled to make sense of them. Rather than including checkboxes, which insinuate users can select more than one option at a time in the filter, each option included a carat icon. Carat icons tend to indicate expanding and collapsing rather than filter selection. This made it unclear which filter(s) were applied, particularly for the year, as it was unclear whether the light or dark blue indicated selection. One user said, "Either I did something wrong, or it doesn't work well."




*The Scottish Government included filters on the left side of its main* News *page for* Categories, Popular, *and* Recent.

Once selected, sometimes the filter value would highlight in yellow, while for other filters, the text would turn blue. This visual treatment was inconsistent and didn't correctly set expectations as to whether users could only select one filter option at a time or many. A much better approach would be using simple checkboxes alongside each filter value so that users could select one or multiple options.




*The applied filters on the Scottish Government's* News *landing page appeared inconsistently. Using checkboxes next to each filter value would be better than carat icons and inconsistent selection treatments.*

## 23. Keep news articles concise and include clear headlines.

Employees don't want to spend excessive time reading news on the intranet. They want to efficiently get the information they need so that they can move on with their workday. Employees also don't read news articles word-for-word. They naturally skim and scan to gain awareness about what's happening in the organization or look for answers.

As such, news needs to consider users' desire for efficiency and their natural skimming and scanning behaviors. News should include clear headlines and subheadings and be concise without sacrificing key messages. Headlines are often the first thing users notice as they skim and scan, so make sure any news headlines on the intranet summarize the key messages in the article. Doing so will help employees understand the headline out of context and decide whether to engage with an article.

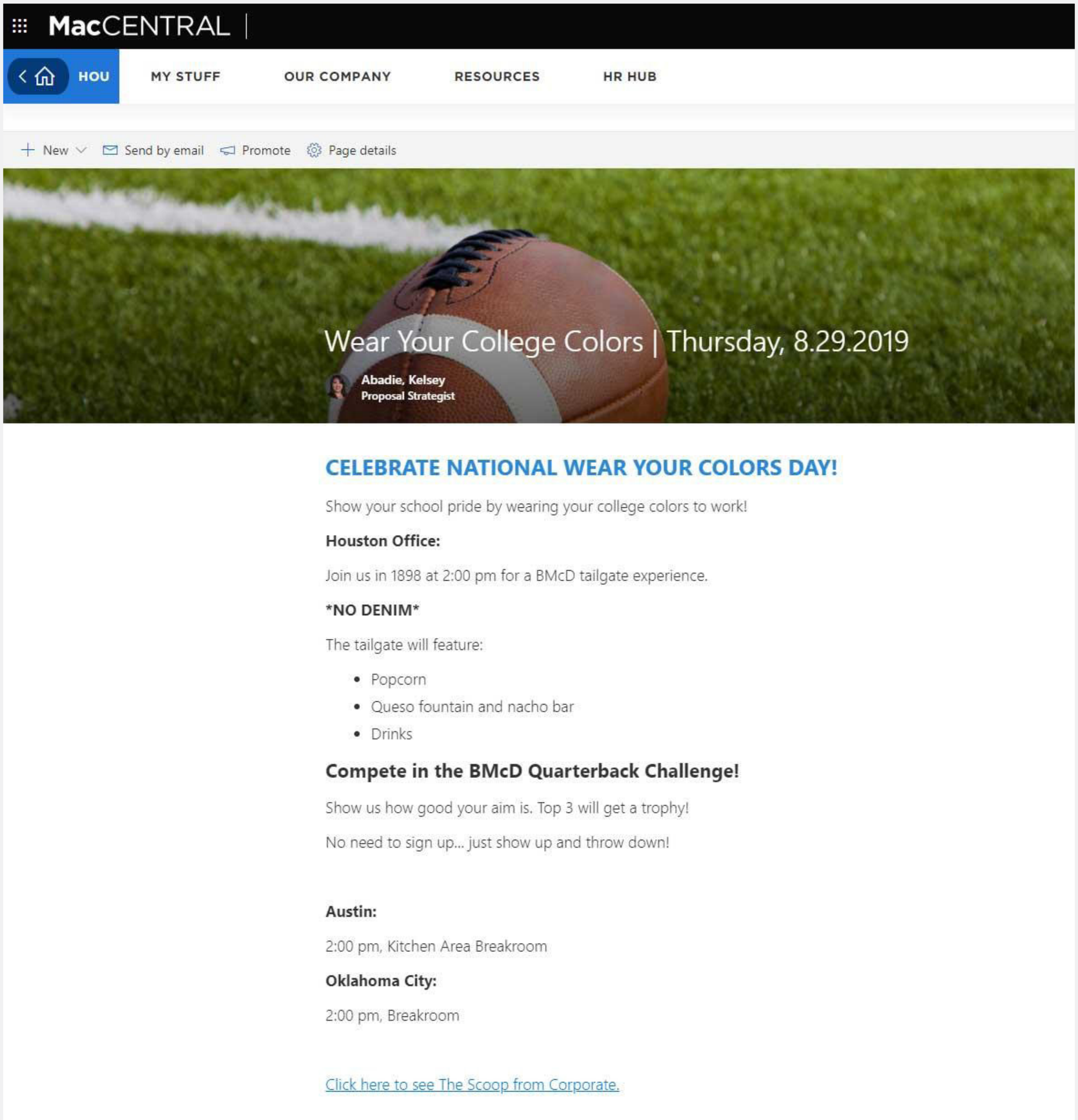
**Employees skim and scan content on the intranet rather than read it thoroughly.**

User Behaviors

The length of news content on the intranet should consider users' natural skimming and scanning behavior when reading online. Users don't read online; they skim and scan content to find what they need and then move on with their next task.

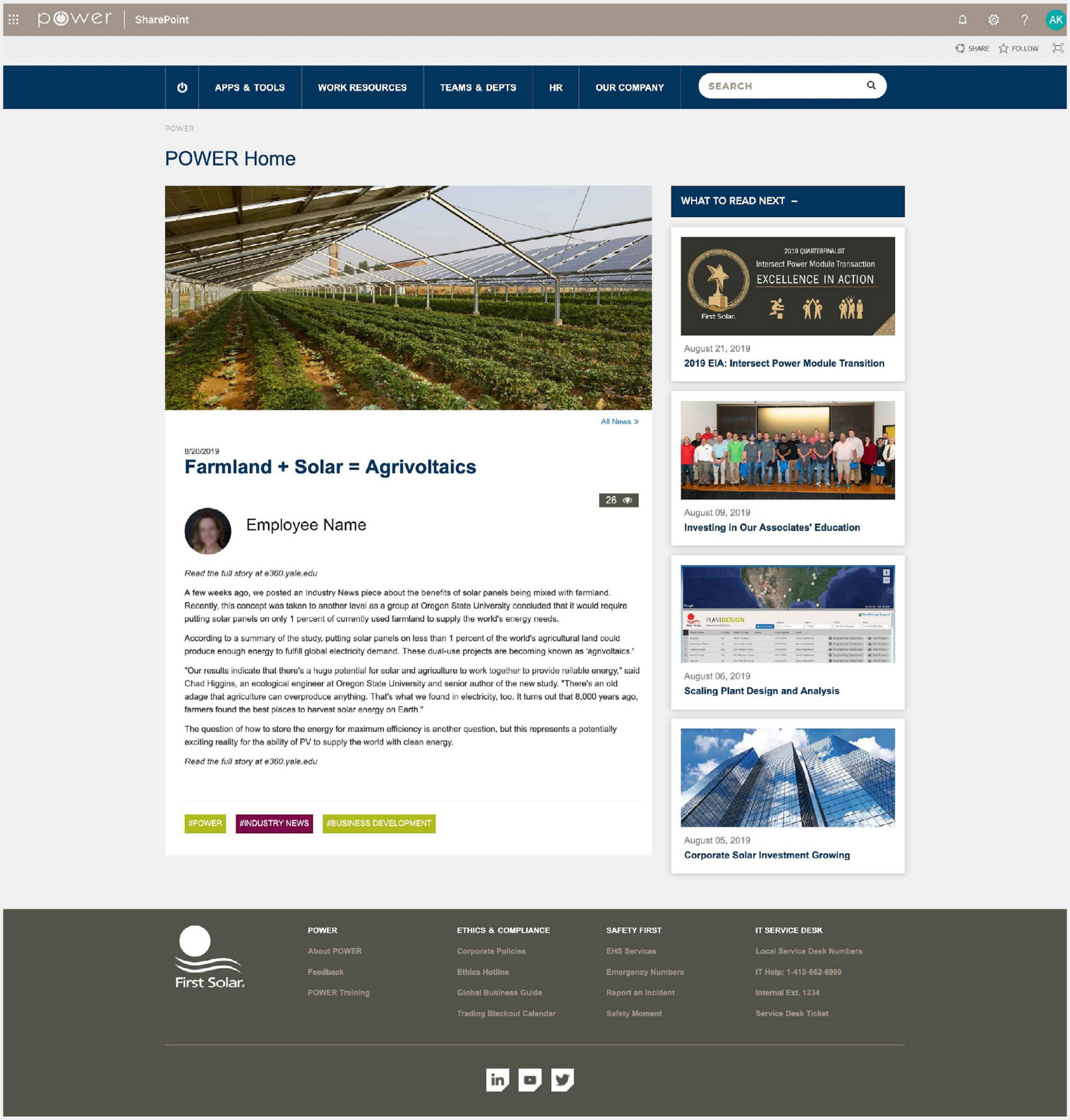
In some cases, employees skip to the bottom to find the main takeaway, so placing these critical points at the top of an article is best.

When we asked employees to read a news article that interested them on Burns & McDonnell's intranet, MacCentral, most people only scanned the first paragraph to get the key message, then they were ready to move on with their day. Luckily, the news content on the intranet was concise and to the point, with the most important message(s) at the top. The team at Burns & McDonnell also used proper formatting techniques such as bullets, subheadings, white space, chunking, and bolding keywords and phrases. One user said, "I'm a skimmer. I won't read entirely, just enough to pick up the gist."




*Burns & McDonnell kept its news articles concise and used formatting techniques such as chunking, white space, clear sub-headlines, bullets, and bolding keywords and phrases to help users quickly take away the main points of the news faster.*

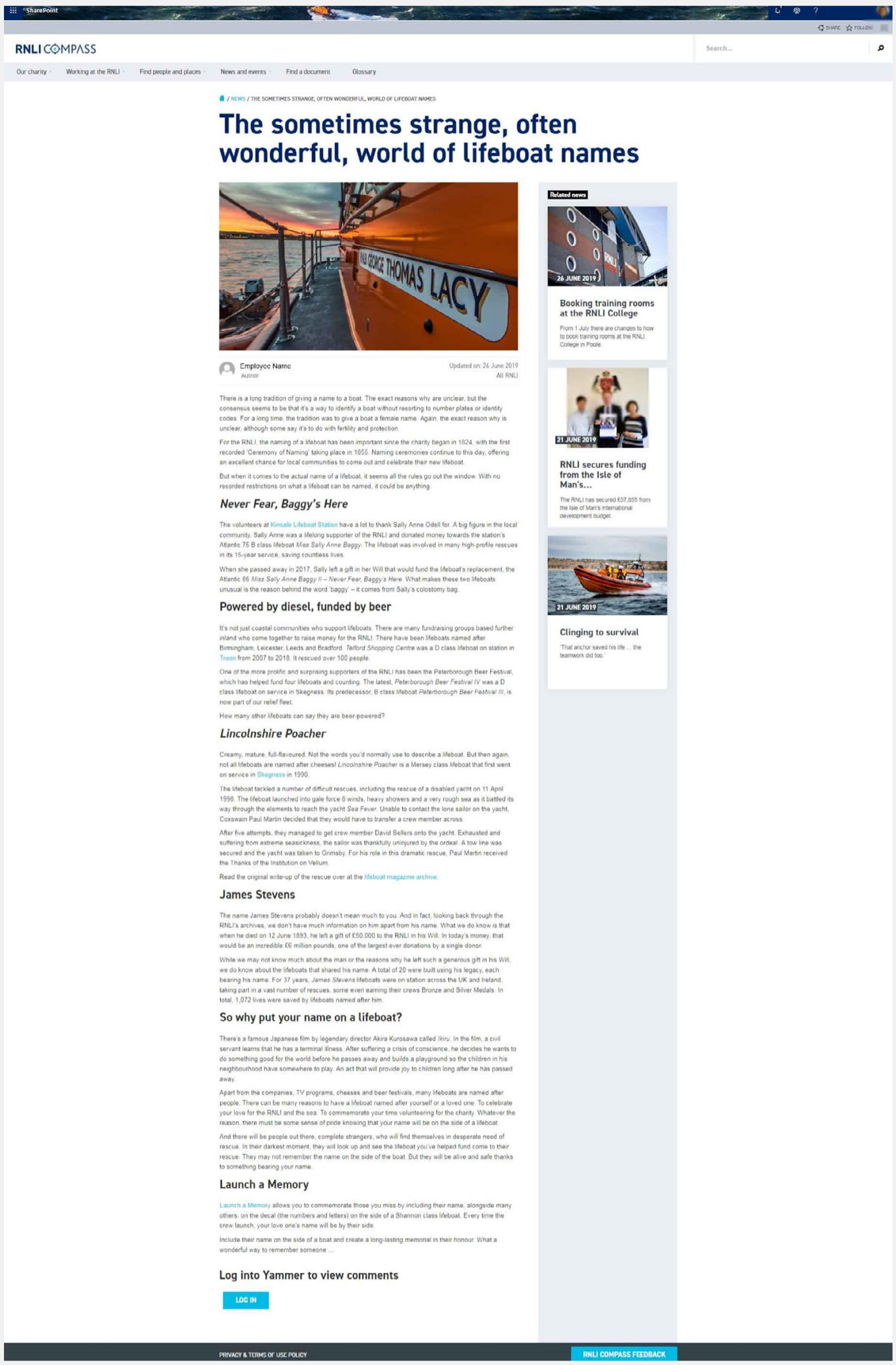
The team at First Solar also did a nice job of keeping news succinct. They distilled a longer piece of news down to a few paragraphs, outlining the main points, benefits, and opportunities for the organization. They also provided a direct link to where employees could read the full story if they wanted to learn more about the topic, which was a favorable option to include.




*Knowing employees wanted to get their news quickly, First Solar summarized a longer piece of news into a few key paragraphs on the intranet and offered employees a link to read the whole story.*

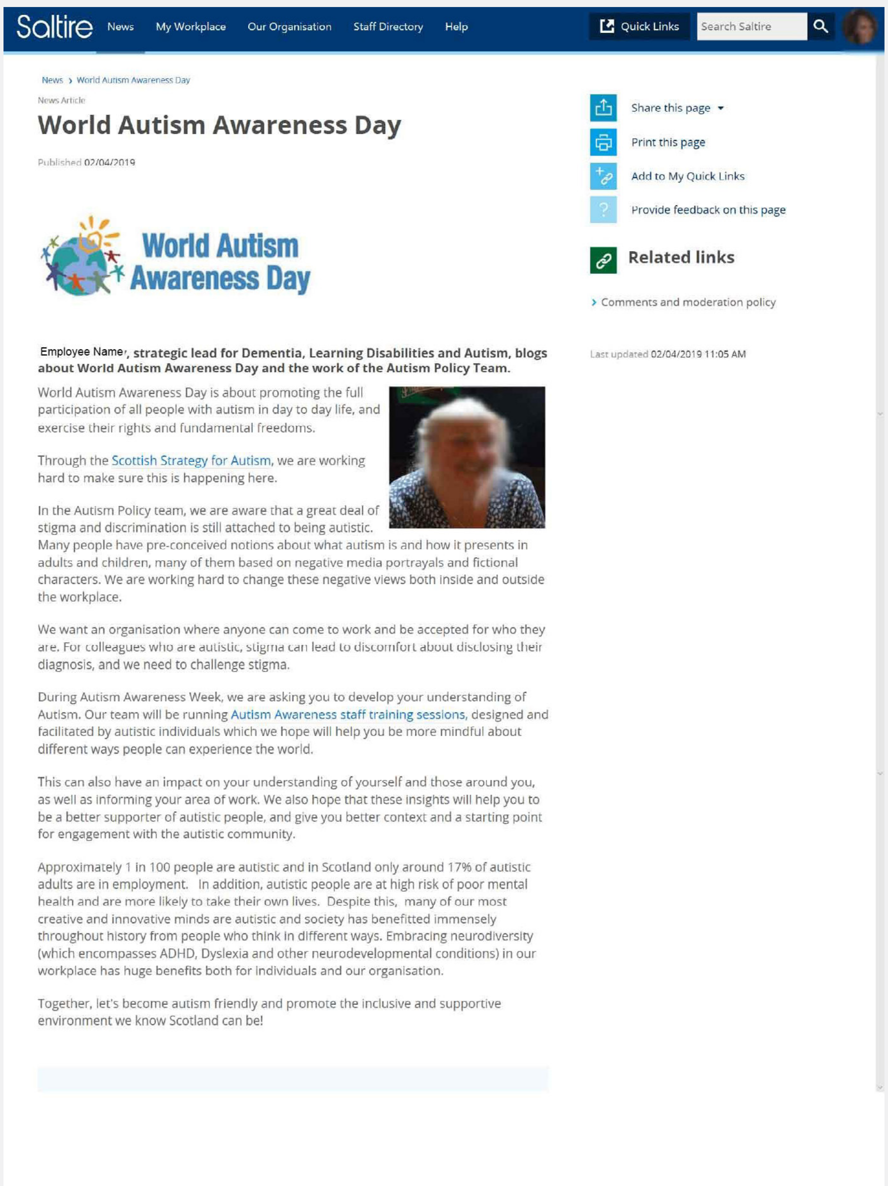
Avoid getting too creative and cutesy when writing news headlines, as this style is usually less meaningful. Favor clarity, as employees don't want to waste time deciphering what a headline means. It's better to write straightforward headlines and reserve overly creative headlines for more casual areas of the intranet, such as marketing content or social media channels.

At the Royal National Lifeboat Institution, the main headline of an article about lifeboat names was clear; however, some of the subheadings, such as *Never Fear, Baggy's Here* and *Powered by diesel, funded by beer* made it less obvious as to what those paragraphs were about. A better approach would be to make this news article more concise and use clearer subheadings to help employees understand what each section is about.




*The Royal National Lifeboat Institution's intranet favorably included headings and subheadings, but they could have been more straightforward and less kitschy.*

Realistically, not all intranet news items can be condensed into a paragraph or two. There will be instances where longer stories are needed, but even with these items, teams should try to remove any extraneous details and focus on the main points. When news is long, it's even more critical to include clear headings and subheadings to help employees skip to the sections they want to read. In their absence, employees will feel like the news takes a lot of time and cognitive effort to consume, and they may become less inclined to interact with it. Don't force employees to try to skim and scan walls of text. Having to parse big chunks of text wastes their time and degrades their perception of the news and the intranet overall. For very long articles, anchor links can also help employees jump to key areas of interest.




*The Scottish Government could have added clear subheadings to help employees skim and scan this article.*

**Offer various ways for employees to consume news.**

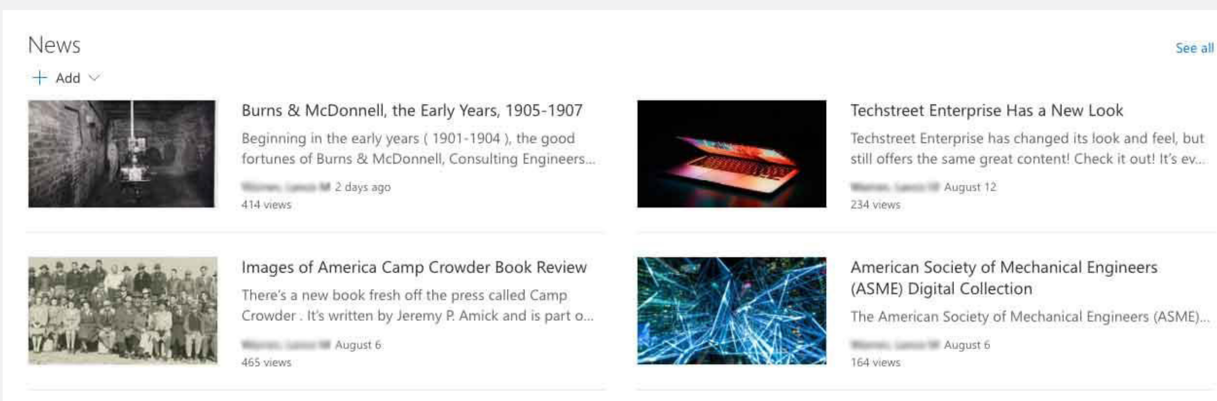
Process and Strategic Considerations

In addition to offering news as written text, consider providing news in video or audio formats. This way, employees have options for consuming company news and can even listen to it while they work and complete other tasks.

## 24. Include short descriptions with news headlines anywhere news articles appear on the intranet.

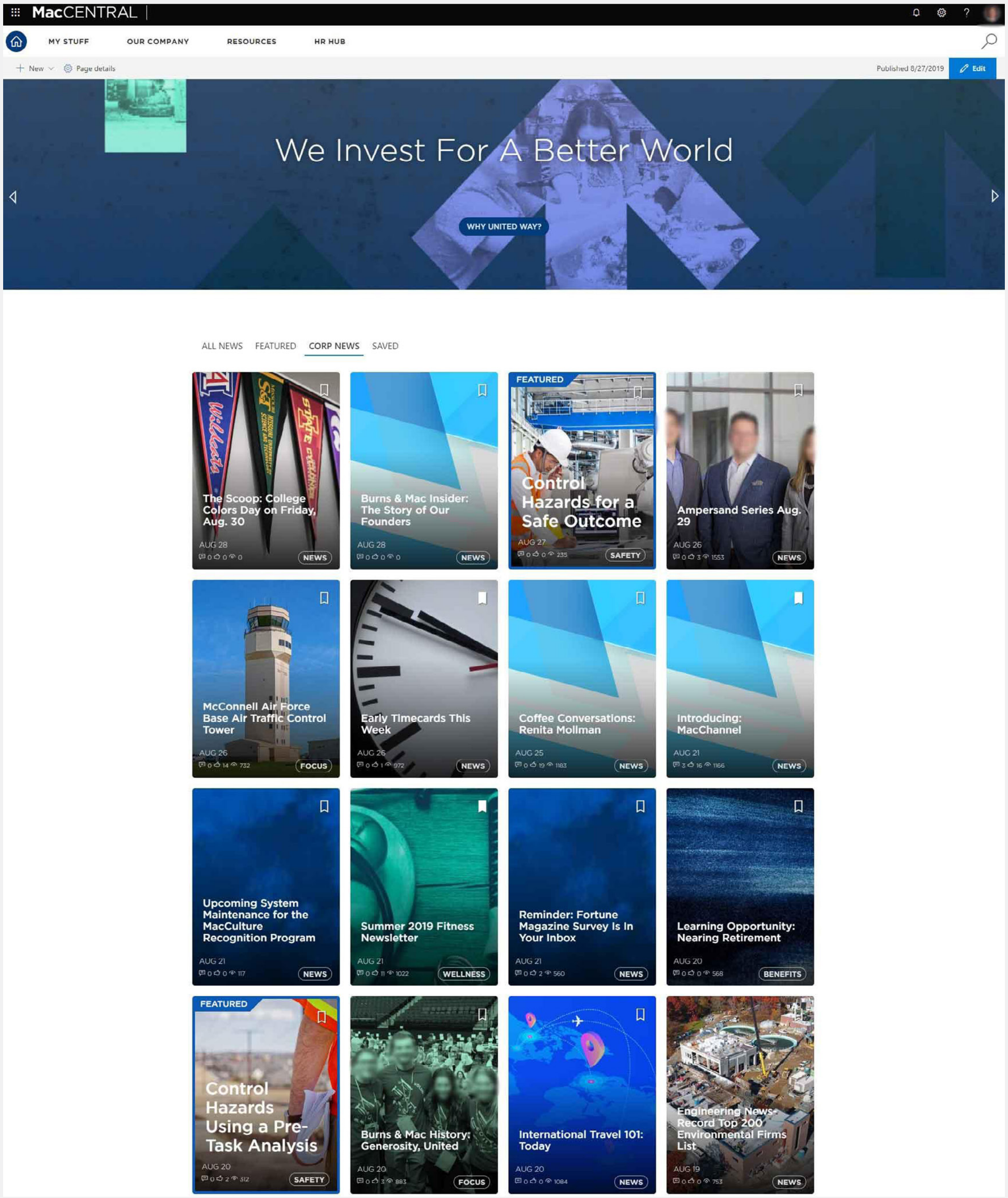
In addition to the headline, include a clear and concise description of each news item. Doing this anywhere news articles are publicized provides more details and helps employees decide which news articles to read. The Burns & McDonnell intranet featured news articles in a variety of card-based designs. The cards were placed contextually in department and team sections to showcase relevant news stories. The most effective design and the one employees were drawn to most, included the following elements:

- An image
- Clear headline
- Two-line description, alluding to what the article was about
- Author
- Publish date
- View counts



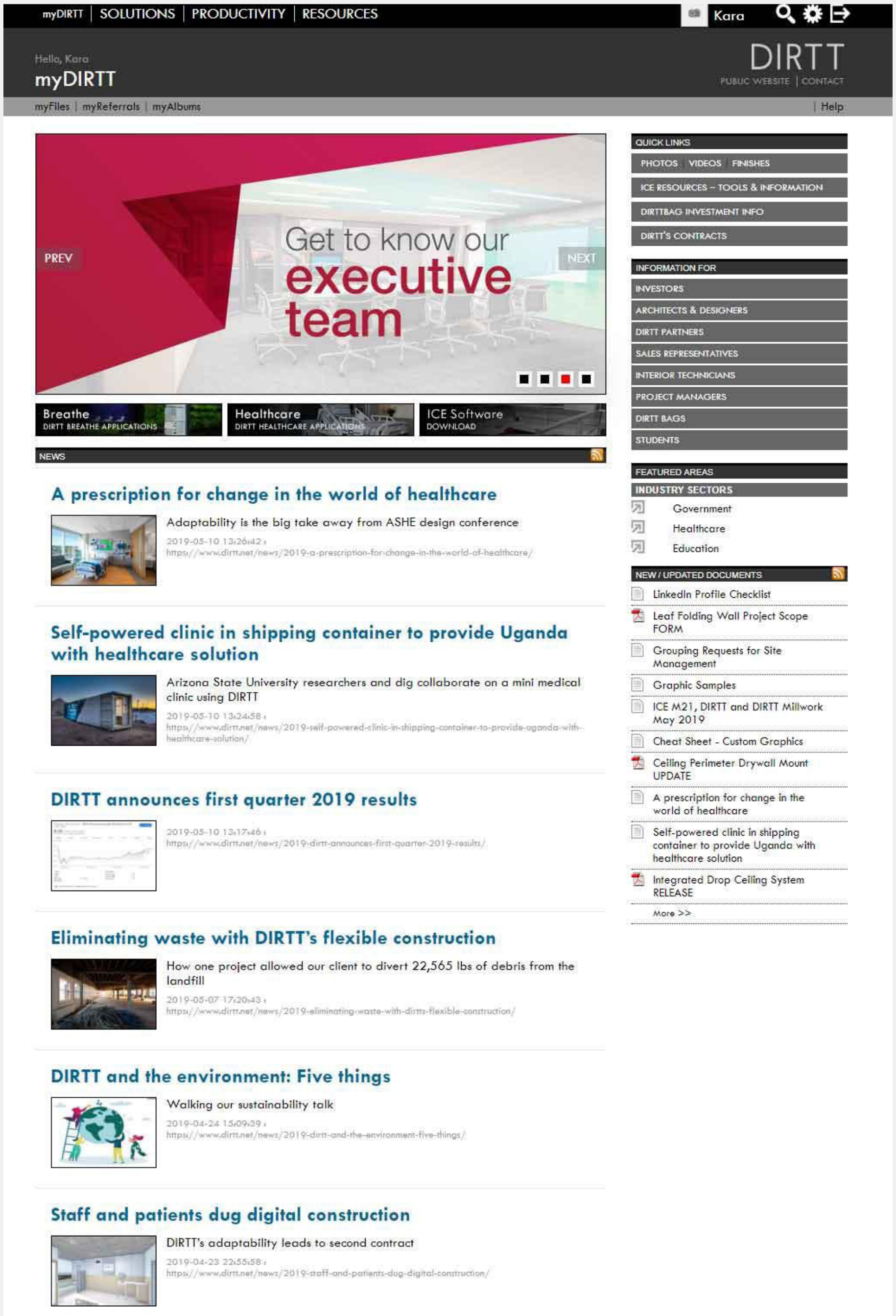

*Burns & McDonnell included short descriptions with news headlines that appeared contextually on the intranet, which was favorable.*

The team at Burns & McDonnell also used a card-based design to feature articles on its main *News* landing page. However, these cards did not include descriptions with the headlines. In some cases, employees didn't have enough context about the news articles from the image and headline alone. This is why we suggest including descriptions to help peak employee interest before they click on a piece of news.




*Burns & McDonnell only used headlines to promote news in other areas of its intranet. A better approach would be to consistently include descriptions along with the headlines.*

DIRTT's intranet had space available to include a short description alongside news headlines, but instead, it used the space only to display an image, the headline, the date, and a link to the news article. In this case, a better approach would have been to include a short description in addition to the other elements used to disseminate news articles.




*Using the space available, DIRTT should include short descriptions alongside the news headlines on the intranet's homepage.*

**Train content publishers to complete necessary fields, such as short descriptions.**

Process and Strategic Considerations

Though we provide detailed recommendations for training content publishers later in this report, here is a good reminder to train anyone who adds or publishes content on the intranet. Without training, individuals may not know which fields to fill out in the content management system. As a result, key fields that display information across the intranet, such as the short descriptions we discussed in this guideline, may be left blank.

Furthermore, in addition to training content publishers to complete these fields, ensure they also understand what a helpful, descriptive summary looks like versus one that fails to communicate the information employees need effectively. Sometimes these descriptions can be derived automatically from the content in the news article. However, it's always best to have a human review of the snippets, whether they're generated automatically or manually written, before they're published to the intranet.

## 25. Include publication dates to help employees find the latest news.

When we asked employees to find the latest piece of news on the intranet, many thought the very first or largest tile on the intranet's homepage was always the most recent news item. This was sometimes the case, but other times, the first or most prominent news item featured wasn't always the most recent. Employees at one organization grew frustrated looking for the latest news, as they expected this to be one of the easier things to do on the intranet. One employee said:

> "It's frustrating that I couldn't tell you immediately that I wasn't on the latest news article. I see articles all the time flashing through, but I wouldn't be able to tell you which one is current. That seems like it should be pretty easy to do."

One user at the City of Calgary said of the intranet's homepage:

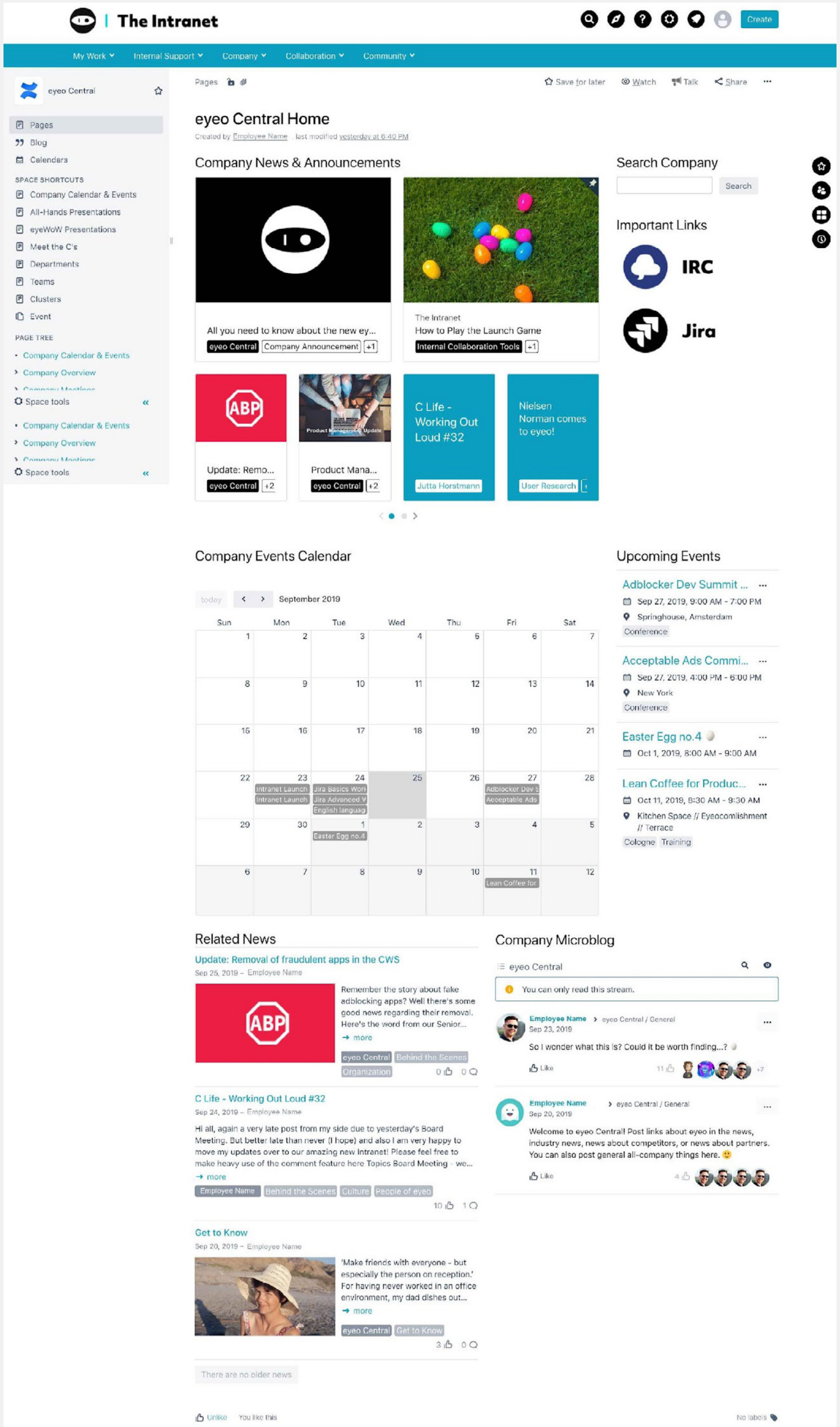
> "Nothing stands out as new or recent to me, but I guess I could scroll through to see if anything is new. I don't know which one is the newest. I normally tend to stop on my homepage. It will have a box for things I should know this week, so that's one way I know if I'm looking at the latest news or not."

News articles featured in the news area at the top of Eyeo's intranet homepage didn't display dates, which made it difficult for users to know which news items were the latest. While in other areas of the intranet, such as on the news hub and *Eyeo Central*, dates *did* appear on news and events cards.

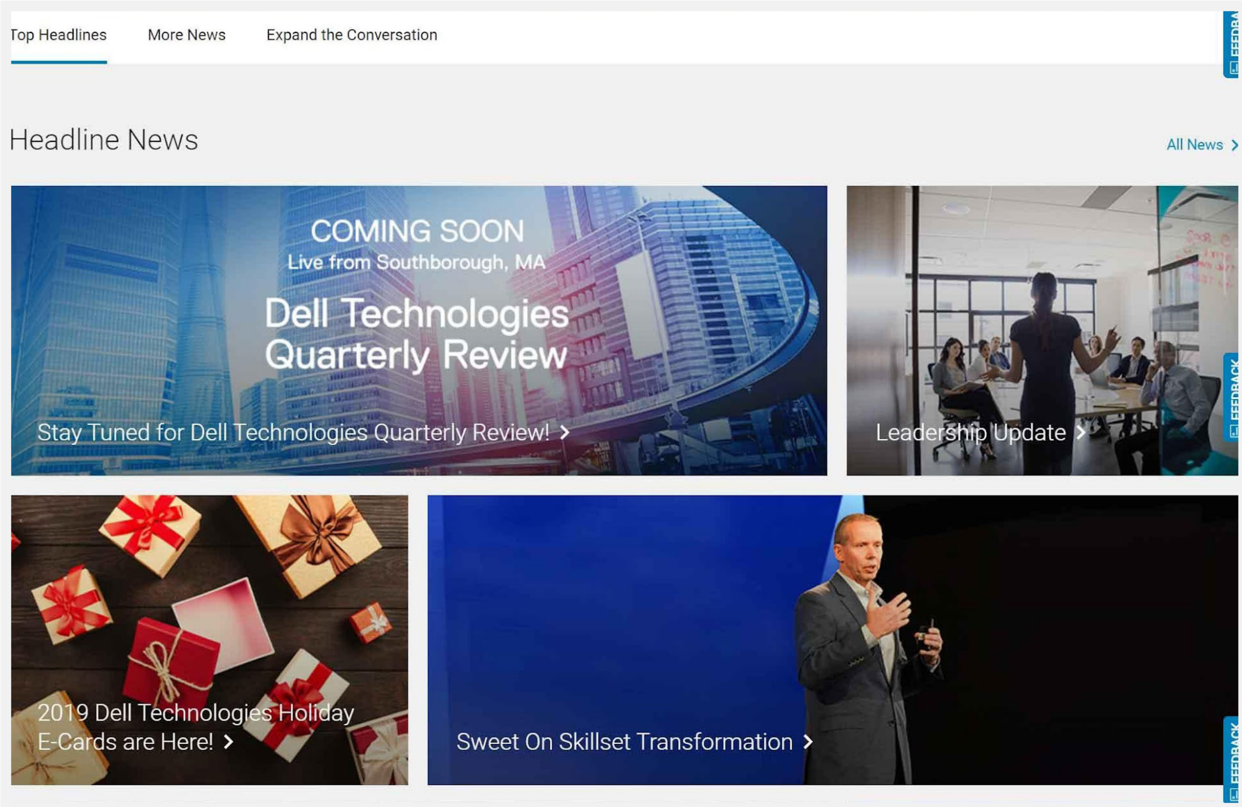
One user said of the news on the homepage, “I don’t know if that’s really the latest. I would go for this one here because I know the other ones haven’t changed since yesterday.” Another user said, “The latest edition would be on the left; maybe my answer is not correct, as it looks like it could be pinned. It looks like a sticky thing that never moves. Maybe that’s for important stuff?” And finally, another user said, “There’s not actually a date on the thumbnail. I have to click on it to know that it’s the newest. I have to assume that since the date is the 26th that it’s the newest.”

The intrants that included visible publication dates alongside news headlines and short descriptions left no question about which news article was the most recent. Without the publication dates, employees had to guess which news article was the most recent.

On Dell’s intranet, only one user out of the five we studied successfully found the latest news. The news cards on Dell’s homepage did not contain dates, which made it difficult for users to truly know which ones were the most recent. One user said, “I would assume they would put the latest on top, but I’m not certain.”




*The featured news articles on Eyeo's intranet homepage did not include dates; however, those within the main* Related News *section below did. A better, more consistent approach would be to include publication dates anywhere news articles appear on the intranet.*




*Dell should add a publication date for each news item featured on the intranet homepage. Without dates, users had difficulty locating which news item was the most recent from the homepage.*

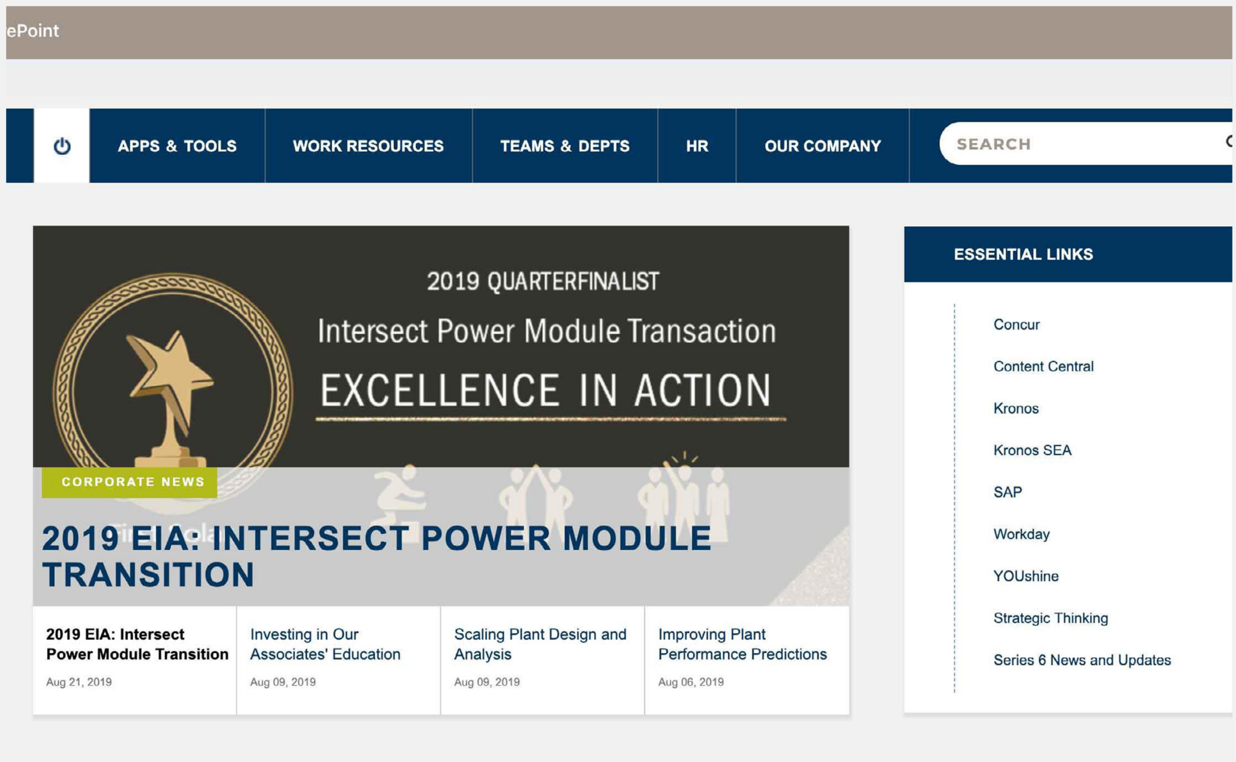
**Write out dates in full instead of using numbers to represent months and days.**

Timeless Design Tips

With dates, always write out the month or a partial abbreviation rather than relying on numbers alone. For example, write "June 2, 2020" or "Jun 2, 2020," not "6/2/20 or 2/6/20."

If your organization has global offices, use the international date format, where the day is listed first, then the month spelled out, and finally, the year. For example, "17 October 2020."

Because First Solar included publication dates anywhere news articles appeared, employees could immediately tell which ones were the most recent. Employees also appreciated how frequently the organization refreshed the news on the intranet; the team usually launched one to three fresh news articles each week and retired news articles after one year.




*First Solar included dates written out in full alongside news headlines, which was favorable. Including a short description here would make this approach even better.*

### Develop clear standards for intranet news content.

**Process and Strategic Considerations**

Standards help ensure news content aligns with organizational and employee goals. For example, one organization we studied used the following standards for all news on its intranet:

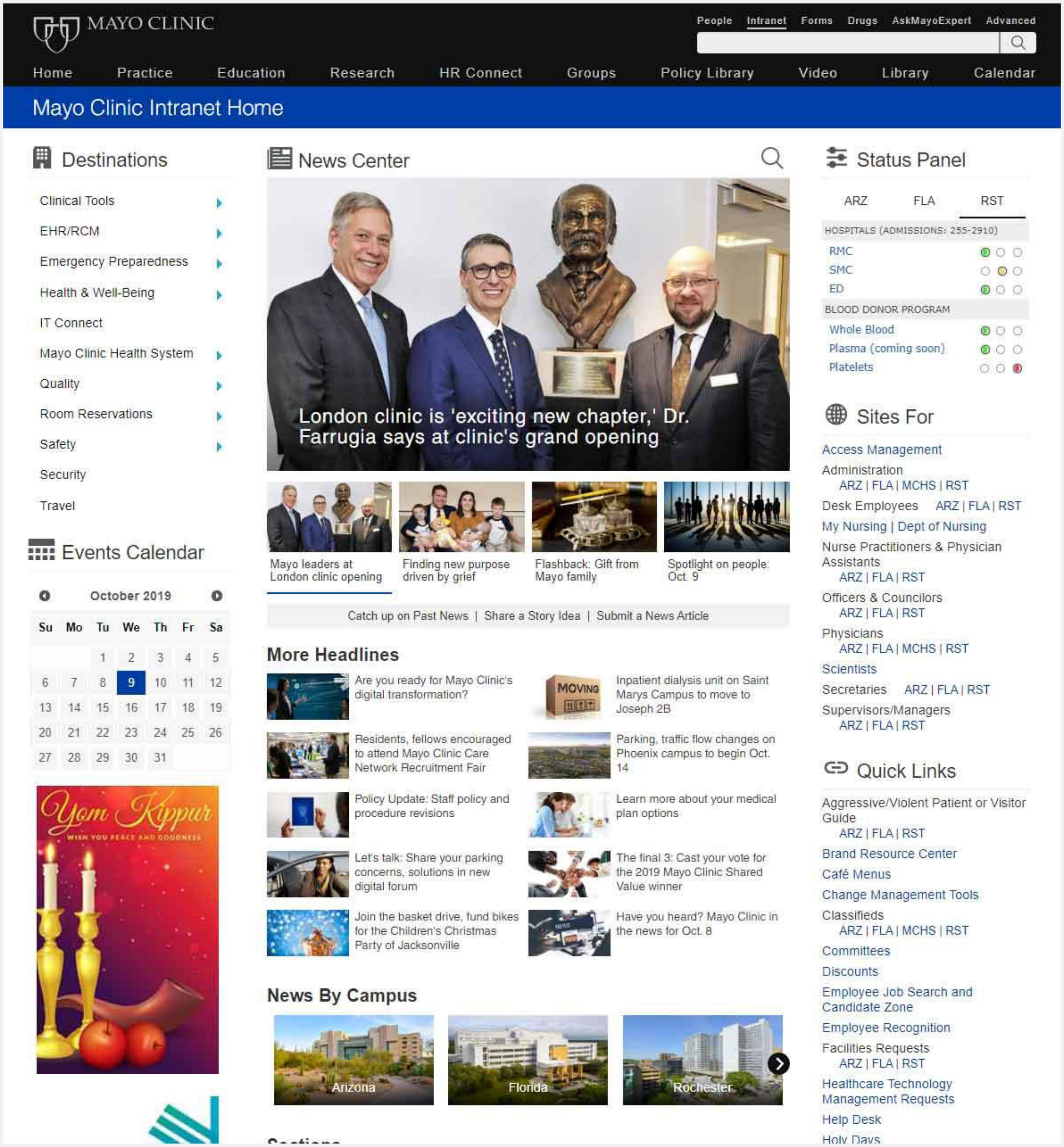
- Use a maximum of 350 words in English and/or French
- Maximum of 65 characters for headlines and subheadings (titles, including spaces)
- Include one to 10 photos (with a minimum width of 800 pixels in landscape orientation)
- A video from YouTube, Vimeo, or our internal web production team may be embedded
- Keep in mind our priorities for gender parity and diversity when drafting news content, including visuals
- Be sure to coordinate with your department's intranet lead and verify that the content is approved by them and/or managers (they followed a hybrid approach to content management)
- Stories written on behalf of a department or office should be sent to news@organization.com by the department's intranet lead when ready.

The intranet team exerts editorial control on applying our guidelines, especially for length, and makes adjustments regarding writing style. We also have control over drafting the title and lead. We'll inform you of the day and time the news story will be published and provide you with statistics about how your content is performing. After one year, news content is automatically unpublished unless it needs to remain for legal or other reasons, which we address at the time of retirement.

Develop standards for news and other content types on the intranet. Without them, the intranet will become an overgrown mess of useless, outdated content.

Date news items with the date they are published. If items are subsequently updated, it's acceptable to also provide the date the update occurred, but make sure to label this date as *updated* alongside the date the article was initially published. At the Royal National Lifeboat Institution, news pages displayed the last update date instead of the publication date. Occasionally, content editors returned to older news postings to update links or typos, but the publication date relates more to how fresh the content is rather than the date last updated.

The date associated with news items on the Mayo Clinic's intranet wasn't visible on the homepage. One user said, "Knowing the latest is kind of tricky. Here on the homepage, they rotate (in the carousel) . . . some might be from today, while others might be from a couple of days ago." A better approach would be to include the date each news item was published, a short description, a clear title, and, when appropriate, an image.




*The news articles on the Mayo Clinic lacked a publication date, which made it harder for employees to tell which story was the most recent.*

**Consider keeping an archive of past news, but only include the most noteworthy articles.**

Process and Strategic Considerations

For any news articles that need to persist beyond a year (or less if your content strategy dictates reviewing, updating, and retiring news more frequently than a year), consider organizing those in a searchable archive. Some organizations let news live for three to six months before reviewing, updating, or moving it to a new or more contextually relevant intranet section or unpublishing it.

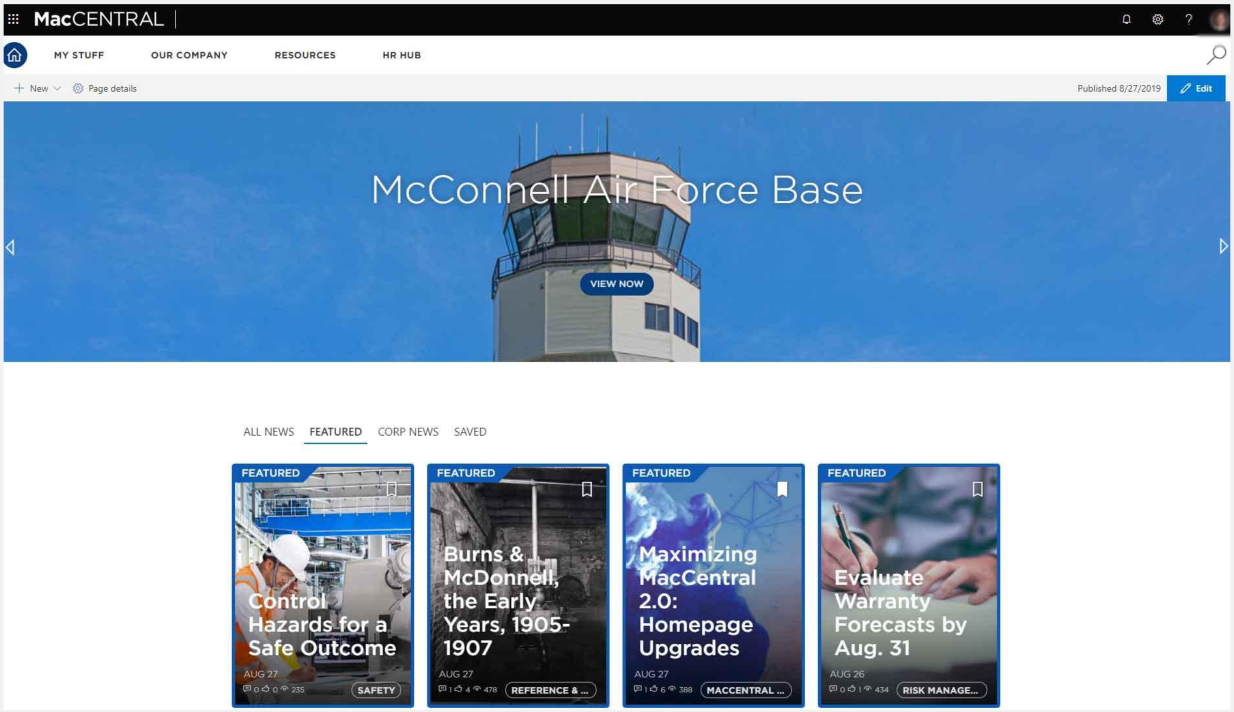
For news that needs to linger for longer, move it to the archives. The best intranets excluded archived articles from the main site search index to ensure the search results didn't get cluttered with old news content that was no longer as recent or as relevant to large groups of employees. Make it possible to access the archive from the News section and from any older news articles. Ensure that users can search the archive and sort by date, topic, article title, and author name. After two years, unpublish articles from the archives.

Include dates for all time-sensitive content on the intranet, especially for news, announcements, and events. Develop a strategy and guidelines for unpublishing these types of content after several months or move retired pieces to an archive so that users don't become put off by older content appearing on the intranet.

## 26. Classify news into meaningful categories and call attention to the most important or trending news.

Categorizing and organizing news into meaningful topic areas can help employees prioritize which news articles to read according to the areas that appeal to them. Having a category for the latest news, most important news, and trending news can also give employees an indication of what news they should remember to read. An agency employee we studied at the Co-operators wanted to see tags next to news items that related specifically to agency staff. Although the agency employee liked the option of reading news about the entire organization, they also wanted to see news solely for agency employees.

Burns & McDonnell used a small *Featured* tag to draw attention to important news and to offset these stories from others on the homepage and across the intranet.

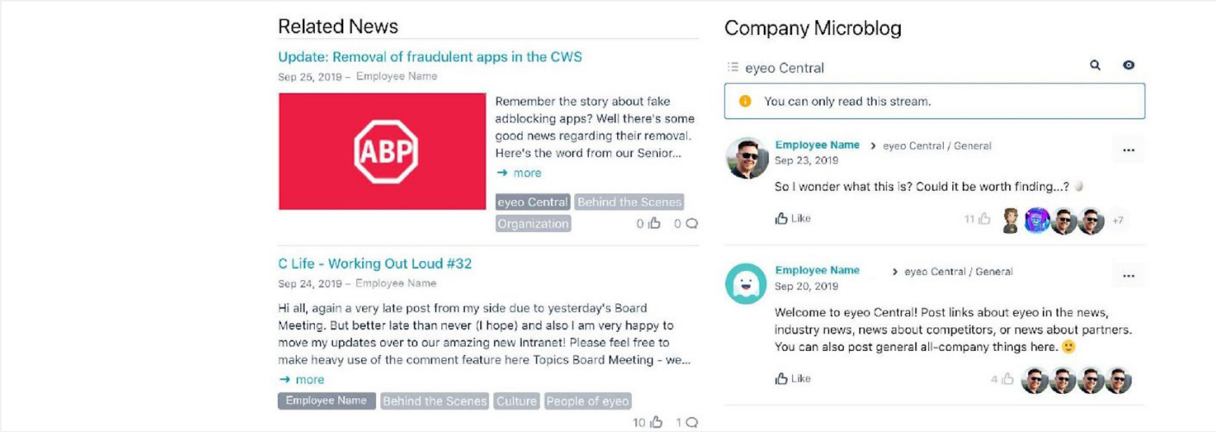



*Burns & McDonnell used categories for* All News, Featured, Corp News, *and* Saved *on its intranet.*

Eyeo GmbH used a variety of news categories to power different areas of its intranet. A member of the intranet team said, “We are working on having all sections populated to pull in the right news and assigning more people as content administrators.” Its intranet news categories included:

- *Company news*
- *Consumer products*
- *Internal collaboration tools*
- *Company announcements*
- *Product updates*
- *Getting to know people*

One user at Eyeo expected to see a category for the *latest news*. They said, “I think this area at the top of the homepage is where I can find out about what is new, but is this actually the latest news item? There should be a category, but I don’t know. On our old intranet, we had categories.”




*Eyeo GmbH's intranet used categories and tags to classify news; however, users sometimes still questioned which news item was the latest.*

The City of Calgary structured news into categories to allow employees to get to more relevant messages faster. A member of the intranet team said, "We came up with news categories to help people better understand what they are seeing."

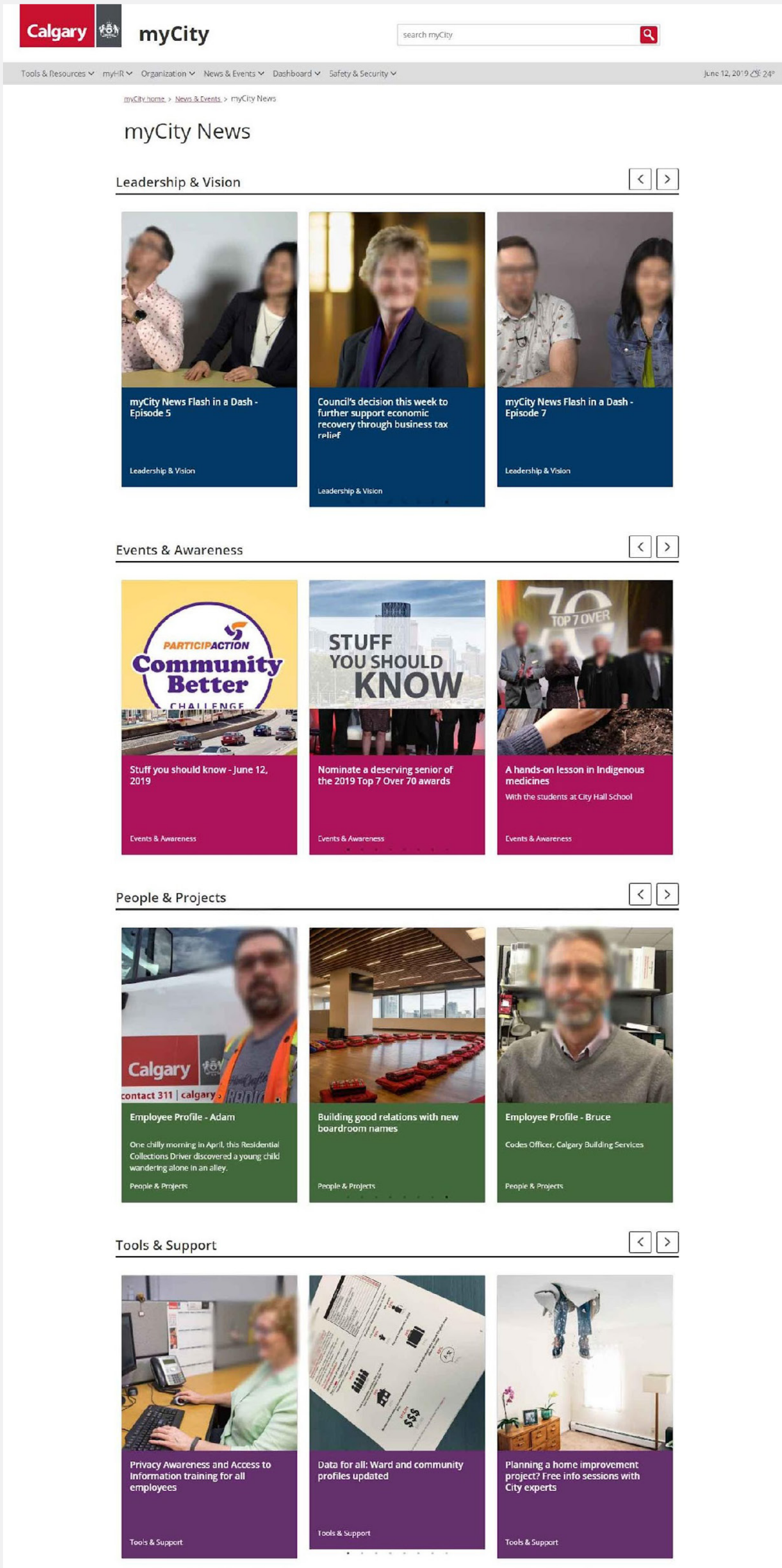
The following color scheme designated the different types of intranet news:

- **Blue tiles:** news from leadership or other priority items employees needed to know
- **Purple tiles:** news about digital workplace tools and support
- **Green tiles:** news about people and projects

These news categories worked well, however, the T*ools and Support* news category was redundant with the *Tools and Resources* category in the intranet's main navigation. This confused some users we tested with, as they didn't immediately differentiate between them. It's also important for employees to be able to search by any news category to bring up a list of corresponding articles.

When we asked one user to find the latest news article about tools and support on the intranet, they immediately went to *Tools and Resources* in the navigation. They said, "Normally, it should be here in *Tools and Resources*. I searched, but I don't feel that it gave me anything. I felt it should have been something more, especially when you click on T*ools and Support*. I didn't feel comfortable finding that."

In this case, a better approach would be to choose a name for the news category that's less similar to the one in the intranet's main navigation.




*The City of Calgary organized news into categories* — Tools & Support, People & Projects, Events & Awareness, *and* Leadership and Vision.

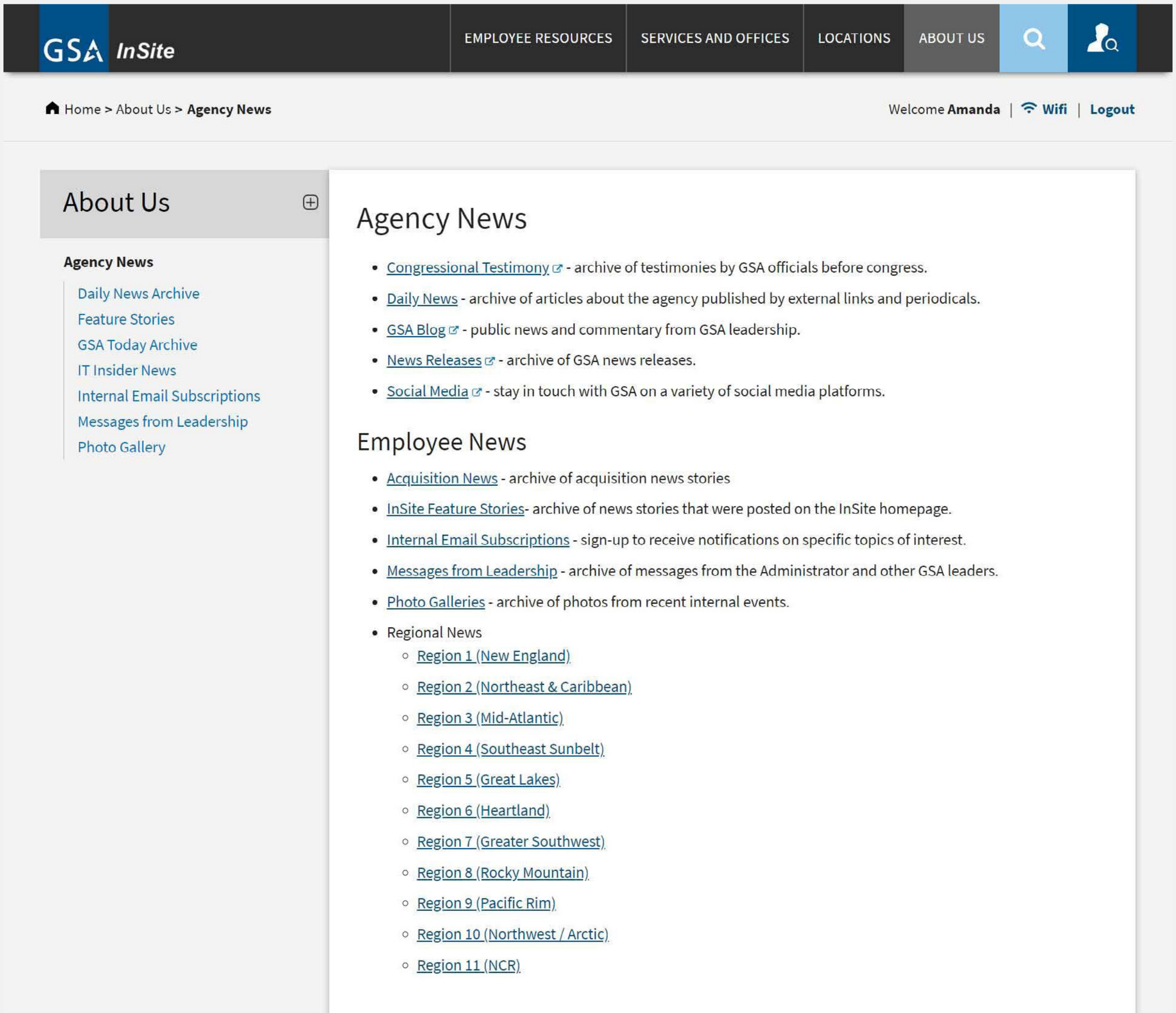
Though the City of Calgary's news categories (*Tools & Support*, *People & Projects*, *Events & Awareness*, and *Leadership and Vision*) worked well for its employees, the intranet had additional news *types* that added redundant layers to news and made employees question what information they should get from where. In addition to the categories, its intranet had the following *types* of news, which is likely too many for busy employees to keep straight:

- *myCity News*
- *All myCity News*
- *Take 5*
- *Stuff You Should Know*
- *All Employee Notices*
- *311 Hot Topics*

Be careful not to arbitrarily over-categorize the news, including by introducing more *types* of news, as employees aren't likely to understand the difference between news categories and types. Too many layers of news also make it hard for employees to know which news they should pay attention to. In the case of the City of Calgary's intranet, users we studied appreciated the *Stuff You Should Know* news category the most.

A team member at the Northern Alberta Institute of Technology said, "We have 13 different categories for news and announcements. There are many different news layers which makes it less obvious to know which news or announcement types to pay attention to."

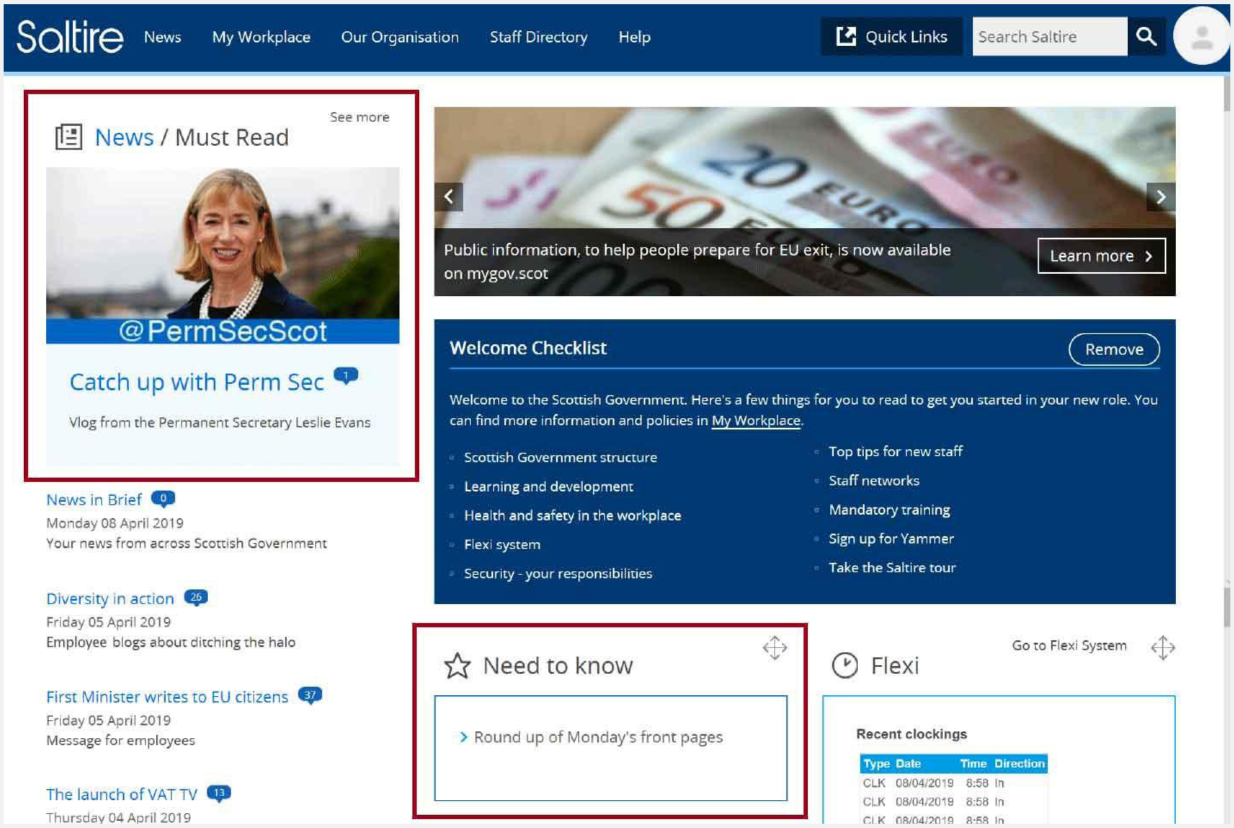
The General Services Administration's intranet also had many different categories and layers of news. It had individual office news and regional news, but in total, it had approximately 21 types of news. This made the intranet experience feel like information overload instead of prioritizing the most impactful and valuable news employees needed.




*The General Services Administration had over 20 types of news on its intranet, which is likely too many for busy employees to keep straight.*

The Scottish Government used a *Must-Read* category for its intranet news, which was favorable. The corporate communications team curated this category and helped emphasize the news everyone needed to know about or stay aware of. Such pieces might include briefing notes from a minister, details about Brexit, anything related to the economy, the GDP, jobs, unemployment, or the budget. When describing how she decided which news stories ended up in this space, one team member said:

> “If it’s something that’s big enough that people need to know about it, it goes in the *Must-Read* section on the homepage. We are trying to recognize silos and helping to spread knowledge across the organization. Lots of people are reading these news pieces. We sometimes link to the BBC’s rolling news on Brexit, and we use Bitly to track the links that are from other sites to see how they perform.”




*The Scottish Government included* Must Read *and* Need to Know *categories for news on its intranet's homepage, which was favorable.*

If reading news is important to employees or is part of the organization's or intranet's goals, consider tagging news by priority, departments, and topics so that employees can explore news relevant to their role or interests. Create separate homepage sections for different types of news, for example:

- **Internal news:** articles and videos created by the intranet team or individuals across the organization
- **External news:** articles about the organization in the broader market
- **Industry news:** *news* about the industries with which the organization is strongly associated

## 27. Differentiate announcements from news and other similar content types.

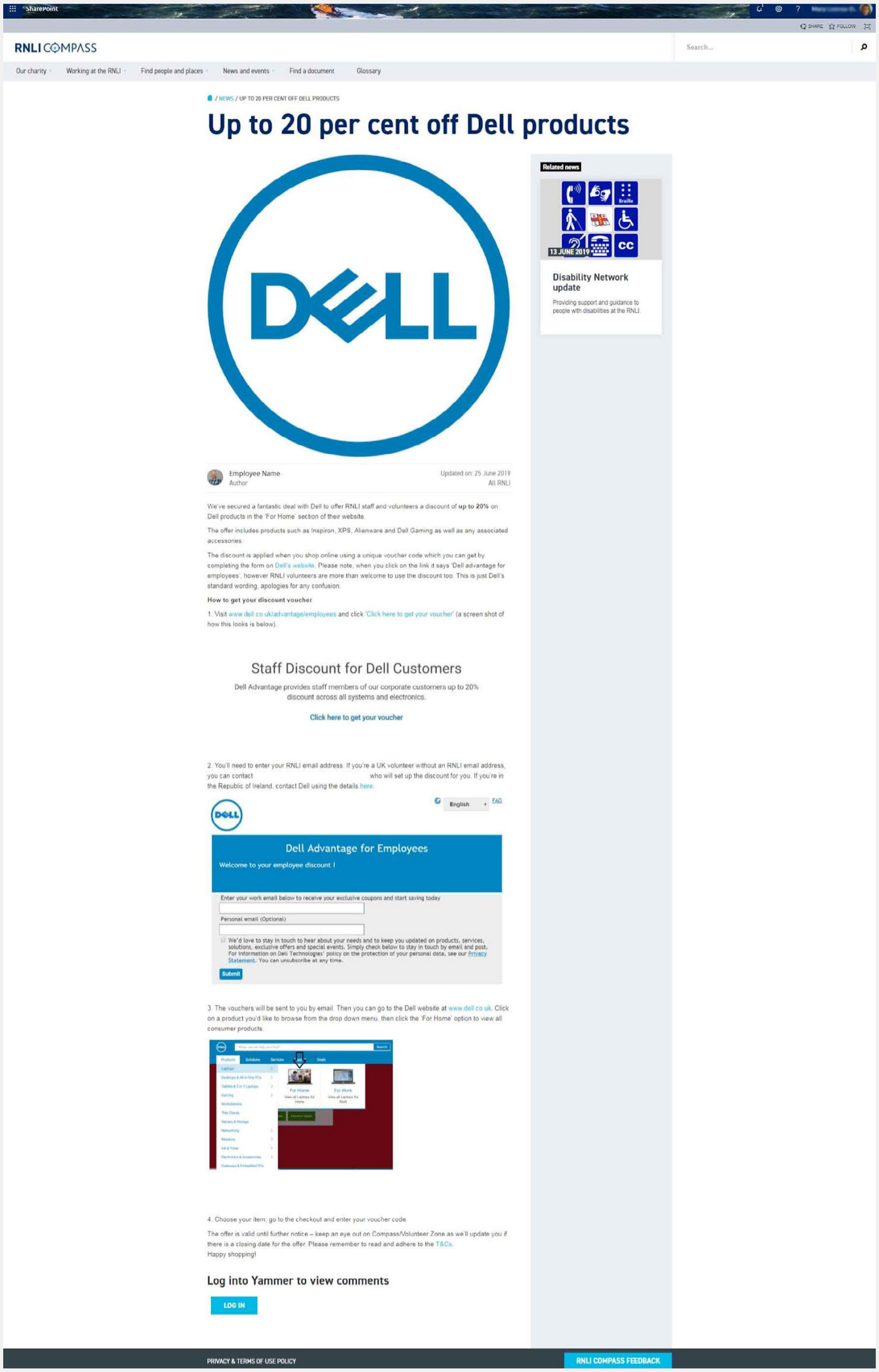
There are often many different types of content on an intranet, including news articles and stories, blog posts, announcements, notifications, alerts, and more. With so many different content types, it's no wonder users in our study were sometimes confused about whether items in the *News* section of the intranet and on the homepage were news, announcements, or something else altogether. It's best to state a purpose for each content type and use those purposes to guide how you choose the communication vehicle best suited for serving a particular message to avoid confusion. Additionally, stating a purpose for each content type will also help everyone — from the team members creating content to the employees who consume it — keep them straight. Some example purposes for various content types include:

- **News:** News includes full-length, longer-form articles or stories about projects, people, or impacts to the organization, whether internal or external.
- **Blog posts:** Blog posts include mid-to-full length articles or stories reserved for employees and leaders across the organization to share their perspectives, hobbies, work, and personal interests
- **Announcements:** Announcements are mid-to-shorter length snippets of information, often used to create awareness about something happening in the organization or on the intranet. They are often also used to drive traffic to an intranet area or encourage employees to take a specific action, such as signing up for benefits during open enrollment.
- **Alerts and Notifications:** These are short, often one to two-sentence statements reserved for time-sensitive or important messages employees need to know. They ensure employees will notice when accompanied by attention-grabbing visual placement and elements. For example, an alert appeared at the top of the intranet homepage telling employees they should take cover during a tornado (which happened during one of our studies).

On Dell's intranet, based only on the headline, it wasn't always clear if the content was a news article, an announcement, or something else. However, an announcement for a quarterly review meeting was placed prominently at the top of the intranet's homepage and displayed alongside a countdown clock, which informed employees of how many days, hours, minutes, and seconds were left before the meeting commenced. Because this announcement looked so different from a typical news article, it was easy to distinguish.

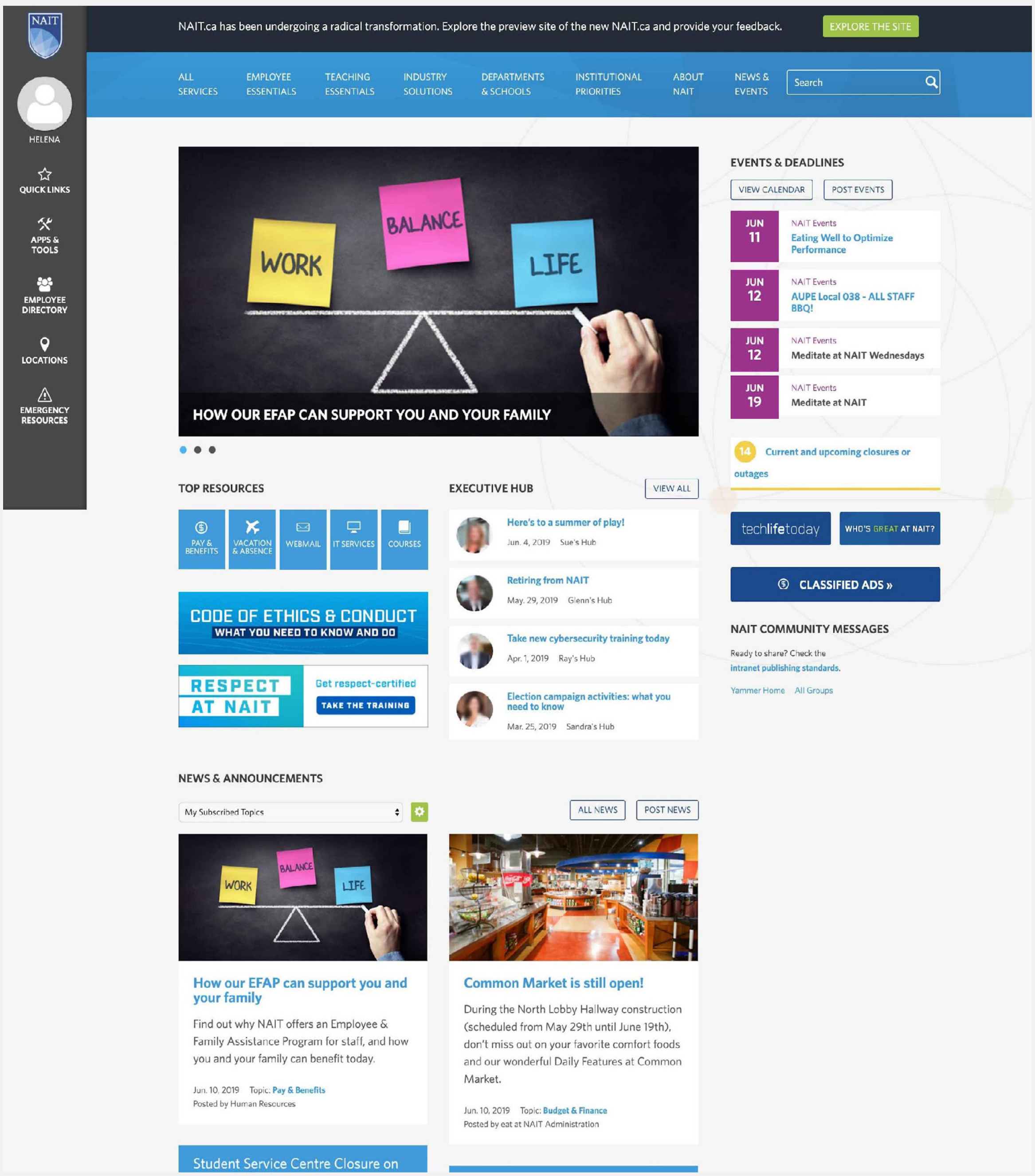

*Dell used an announcement along with a countdown clock on the homepage of its intranet to create awareness for the company's upcoming quarterly review. This was favorable as it made the announcement look different from a news article.*

On the Royal National Lifeboat Institution's intranet, announcements sometimes looked just like news articles, which made it difficult to know when a news article was news or an announcement about something noteworthy employees might want to know. In this case, a better approach would be to preserve the appearance of news articles for genuinely newsworthy items and use a shorter snippet-style of content for announcements. Visually demarcating news items from announcements and labeling each content type are all helpful approaches.




*Content that would have been better suited as an announcement was sometimes presented as news on the Royal National Lifeboat Institution's intranet. This treatment blurred the line between the two content types rather than allowing them to each have their own purpose and identity.*

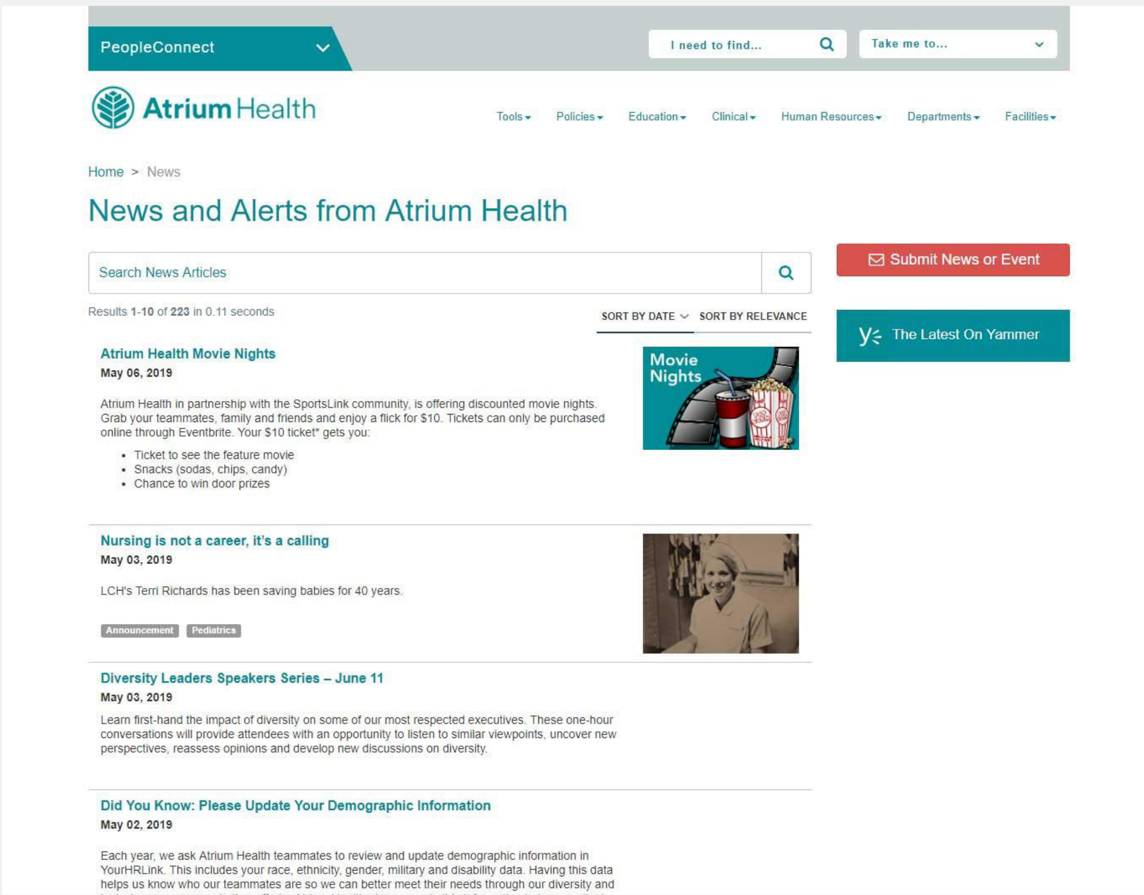
At the Northern Alberta Institute of Technology, all the employees we tested with could successfully find the latest news. The *News* area on the homepage was labeled as *News & Announcements* to simplify and remove confusion. Grouping the two content types is also a favorable approach. It helps remove the question of whether employees need to pay attention to two different areas — *News* and *Announcements*. In the case of NAIT, employees could find everything they needed related to *News and Announcements* from this space.




*NAIT grouped* News & Announcements *into one clearly labeled section on the homepage of its intranet.*

With both news and announcements, Atrium Health had two very similar types of content on its intranet. The main heading that appeared in the *News* section was labeled *News and Alerts from Atrium Health*, even though the majority of content there was only news articles and announcements, not alerts. *Announcements* contained a grey tag labeled, *Announcements* to visually distinguish them from news, which was favorable.

An even better approach would be to label this section *News and Announcements* instead of calling it *News and Alerts* since alerts didn't appear here. If alerts also appeared here, they would likely get lost amid the other content types, which would be unfavorable since it's usually important to pay attention to alerts. Alerts would be more appropriately housed at the very top of the page or in the right rail. It would also be favorable to use a prominent banner and color, similar to the call-to-action button on the right side of the page that is used to submit news or an event.




*A grey* Announcements *tag appeared on all announcements on Atrium Health's intranet. This small detail helped to visually distinguish announcements from other similar content types, especially news, which was also featured in this area.*

## 28. Use email newsletters to deliver news directly to employees' inboxes and drive traffic to the intranet.

Though accessing news on the intranet is an essential activity for employees to be able to do, it's also favorable to offer other ways in which employees can receive news, especially when they don't have time in their workday to deliberately visit the intranet to skim and scan for fresh news.

**Employees read organizational news that is emailed directly to their inbox.**

User Behaviors

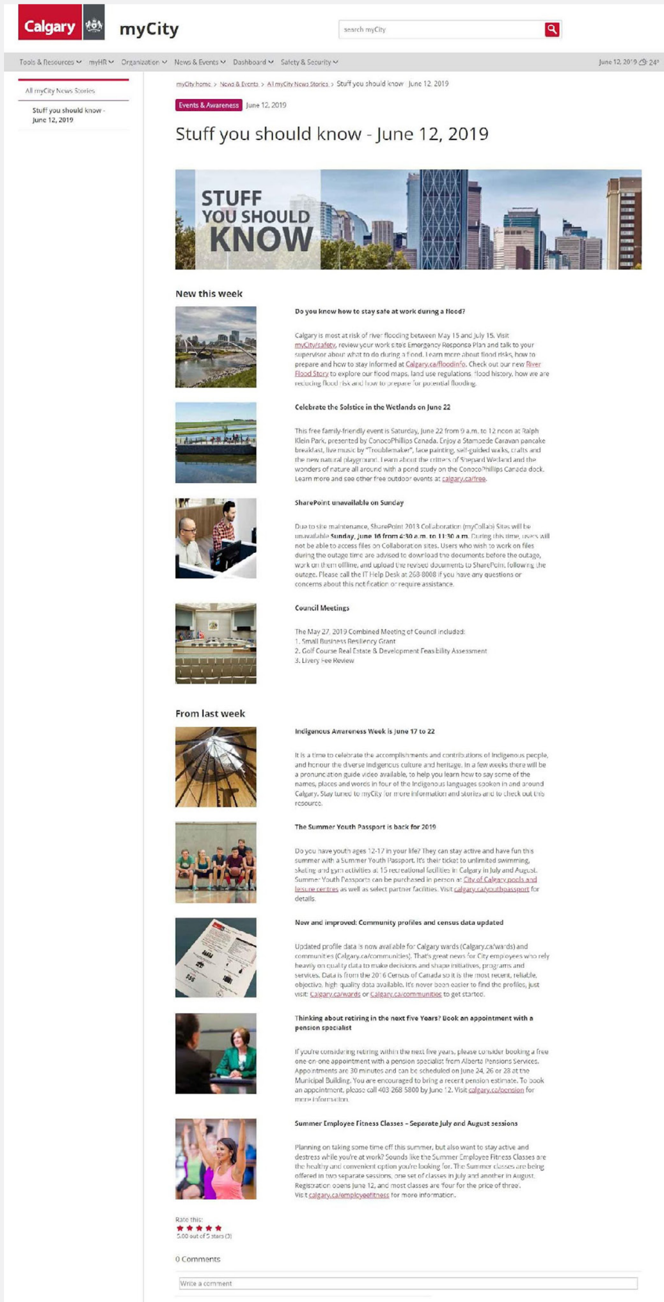
In our most recent study, many users said they don't read news about the organization directly on the intranet. That's because they receive email newsletters that contain the same news that's posted there, and it's easier for employees to consume the news from their inbox rather than navigating to the intranet. That's because they always have their inbox open, and their attention focused on it throughout the workday.

At Dell, three out of the five participants we studied explicitly mentioned that they read news from the digest emails they receive instead of browsing the intranet's homepage. One user said, "Anything that is important is emailed to us." And another employee said, "I don't come to the intranet to read news. They take specific items and email them to us. If I want to read it, I already have it in my inbox. If I want to know more, I'll click through and get to the intranet anyway."

Always ensure that any news employees receive via an email newsletter is also available and accessible on the intranet. A content manager at the Mayo Clinic described the process she followed to curate the content for four different newsletters she sent out to the doctors in her department. One of the newsletters was monthly, while the others were quarterly. She requested content from people, organized it, met with the editorial group, and facilitated sending out each newsletter. When asked why she did this, she said, "The doctors in my group like to get news emailed to them so they can open it on their phones while they're on the go."

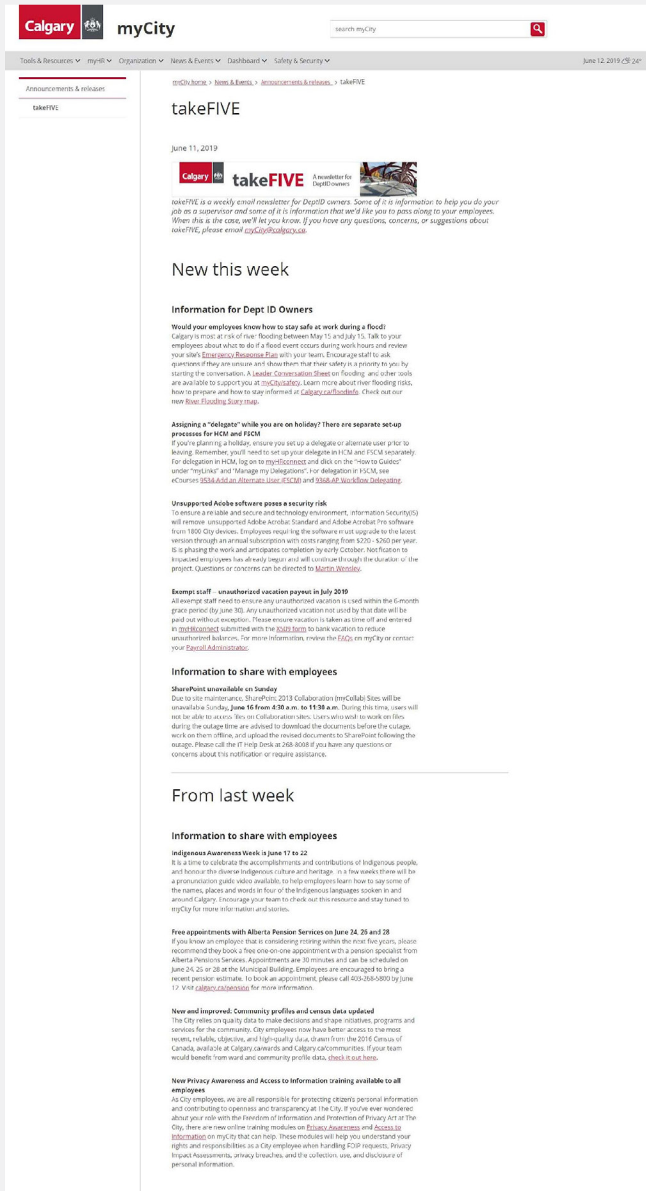
Along the same lines as busy doctors, the intranet team at Burns & McDonnell also used weekly emails that linked back to the news on the intranet for the company's engineers. The team felt that this worked better to ensure people would see the news, but specifically worked well for the engineers, who they described as busy and accustomed to using email. Beyond including news in the Weekly Digest, rightly titled, *In Case You Missed It*, the emailed content also contained lists of pages on the intranet that had recently changed along with new happenings in the communities they followed.

At the City of Calgary, the intranet team used a weekly email newsletter called *Stuff You Should Know* to distribute shorter, high-impact news to employees. Participants throughout our study recognized the newsletter as a valuable and reliable resource that they trusted to get information about the City of Calgary and other workplace happenings. The team shared that email open rates for *Stuff You Should Know* were strong and trended around 25%. The newsletter also drove additional traffic to the intranet, as each edition was published there.




*The City of Calgary used an email newsletter called,* Stuff You Should Know *to prioritize and send the most noteworthy news to employees' inboxes each week, which they appreciated.*

In addition to the *Stuff You Should Know* publication, The City of Calgary also had other email newsletters. An *All Employee Notice* also went out each week and contained all the news from the previous week (Thursday to Thursday). That newsletter included an employee tip that rotated through topics related to wellness, safety and security, and HR. It also contained a more feel-good news story that didn't always fit with the style of news on the intranet but was still fun stuff for staff to read. Another newsletter, called *takeFIVE*, distributed messages to supervisors, some of which they needed to communicate to employees.


Calgary myCity

search myCity

Tools & Resources myHR Organization News & Events Dashboard Safety & Security June 12, 2019 24°

Announcements & releases

takeFIVE

myCity home > News & Events > Announcements & releases > takeFIVE

takeFIVE

June 11, 2019

Calgary takeFIVE A newsletter for DeptID owners

*takeFIVE is a weekly email newsletter for DeptID owners. Some of it is information to help you do your job as a supervisor and some of it is information that we'd like you to pass along to your employees. When this is the case, we'll let you know. If you have any questions, concerns, or suggestions about takeFIVE, please email myCity@calgary.ca.*

New this week

**Information for Dept ID Owners**

**Would your employees know how to stay safe at work during a flood?**
Calgary is most at risk of river flooding between May 15 and July 15. Talk to your employees about what to do if a flood event occurs during work hours and review your site's Emergency Response Plan with your team. Encourage staff to ask questions if they are unsure and show them that their safety is a priority to you by starting the conversation. A Leader Conversation Sheet on flooding and other tools are available to support you at myCity/safety. Learn more about river flooding risks, how to prepare and how to stay informed at Calgary.ca/floodinfo. Check out our new River Flooding Story map.

**Assigning a "delegate" while you are on holiday? There are separate set-up processes for HCM and FSCM**
If you're planning a holiday, ensure you set up a delegate or alternate user prior to leaving. Remember, you'll need to set up your delegate in HCM and FSCM separately. For delegation in HCM, log on to myHRconnect and click on the "How to Guides" under "myLinks" and "Manage my Delegations". For delegation in FSCM, see eCourses 9534-Add an Alternate User (FSCM) and 9368-AP Workflow Delegating.

**Unsupported Adobe software poses a security risk**
To ensure a reliable and secure and technology environment, Information Security(IS) will remove unsupported Adobe Acrobat Standard and Adobe Acrobat Pro software from 1800 City devices. Employees requiring the software must upgrade to the latest version through an annual subscription with costs ranging from $220 - $260 per year. IS is phasing the work and anticipates completion by early October. Notification to impacted employees has already begun and will continue through the duration of the project. Questions or concerns can be directed to Martin Wensley.

**Exempt staff – unauthorized vacation payout in July 2019**
All exempt staff need to ensure any unauthorized vacation is used within the 6-month grace period (by June 30). Any unauthorized vacation not used by that date will be paid out without exception. Please ensure vacation is taken as time off and entered in myHRconnect submitted with the X509 form to bank vacation to reduce unauthorized balances. For more information, review the FAQs on myCity or contact your Payroll Administrator.

**Information to share with employees**

**SharePoint unavailable on Sunday**
Due to site maintenance, SharePoint 2013 Collaboration (myCollab) Sites will be unavailable Sunday, **June 16 from 4:30 a.m. to 11:30 a.m.** During this time, users will not be able to access files on Collaboration sites. Users who wish to work on files during the outage time are advised to download the documents before the outage, work on them offline, and upload the revised documents to SharePoint following the outage. Please call the IT Help Desk at 268-8008 if you have any questions or concerns about this notification or require assistance.

From last week

**Information to share with employees**

**Indigenous Awareness Week is June 17 to 22**
It is a time to celebrate the accomplishments and contributions of Indigenous people, and honour the diverse Indigenous culture and heritage. In a few weeks there will be a pronunciation guide video available, to help employees learn how to say some of the names, places and words in four of the Indigenous languages spoken in and around Calgary. Encourage your team to check out this resource and stay tuned to myCity for more information and stories.

**Free appointments with Alberta Pension Services on June 24, 26 and 28**
If you know an employee that is considering retiring within the next five years, please recommend they book a free one-on-one appointment with a pension specialist from Alberta Pensions Services. Appointments are 30 minutes and can be scheduled on June 24, 26 or 28 at the Municipal Building. Employees are encouraged to bring a recent pension estimate. To book an appointment, please call 403-268-5800 by June 17. Visit calgary.ca/pension for more information.

**New and improved: Community profiles and census data updated**
The City relies on quality data to make decisions and shape initiatives, programs and services for the community. City employees now have better access to the most recent, reliable, objective, and high-quality data, drawn from the 2016 Census of Canada, available at Calgary.ca/wards and Calgary.ca/communities. If your team would benefit from ward and community profile data, check it out here.

**New Privacy Awareness and Access to Information training available to all employees**
As City employees, we are all responsible for protecting citizen's personal information and contributing to openness and transparency at The City. If you've ever wondered about your role with the Freedom of Information and Protection of Privacy Act at The City, there are new online training modules on Privacy Awareness and Access to Information on myCity that can help. These modules will help you understand your rights and responsibilities as a City employee when handling FOIP requests, Privacy Impact Assessments, privacy breaches, and the collection, use, and disclosure of personal information.

*The* takeFIVE *newsletter from the City of Calgary contained key messages for those in leadership roles. Leadership something passed those messages along to their employees.*

Having multiple newsletters caused some employees at the City of Calgary to become confused about what type of news was in which newsletter. For example, an employee searched their email inbox and asked, "*All Employee Notice*, is that the same as *Stuff You Should Know*? If I'm interested in news, I read it. I don't go to the intranet to search for something, or to read something."

That user later navigated to the intranet's homepage and found a featured card in the news section called *Stuff You Should Know*. After clicking on it and following the task prompt to read anything of interest in *Stuff You Should Know*, they scanned the headlines and the first two lines of each snippet and said:

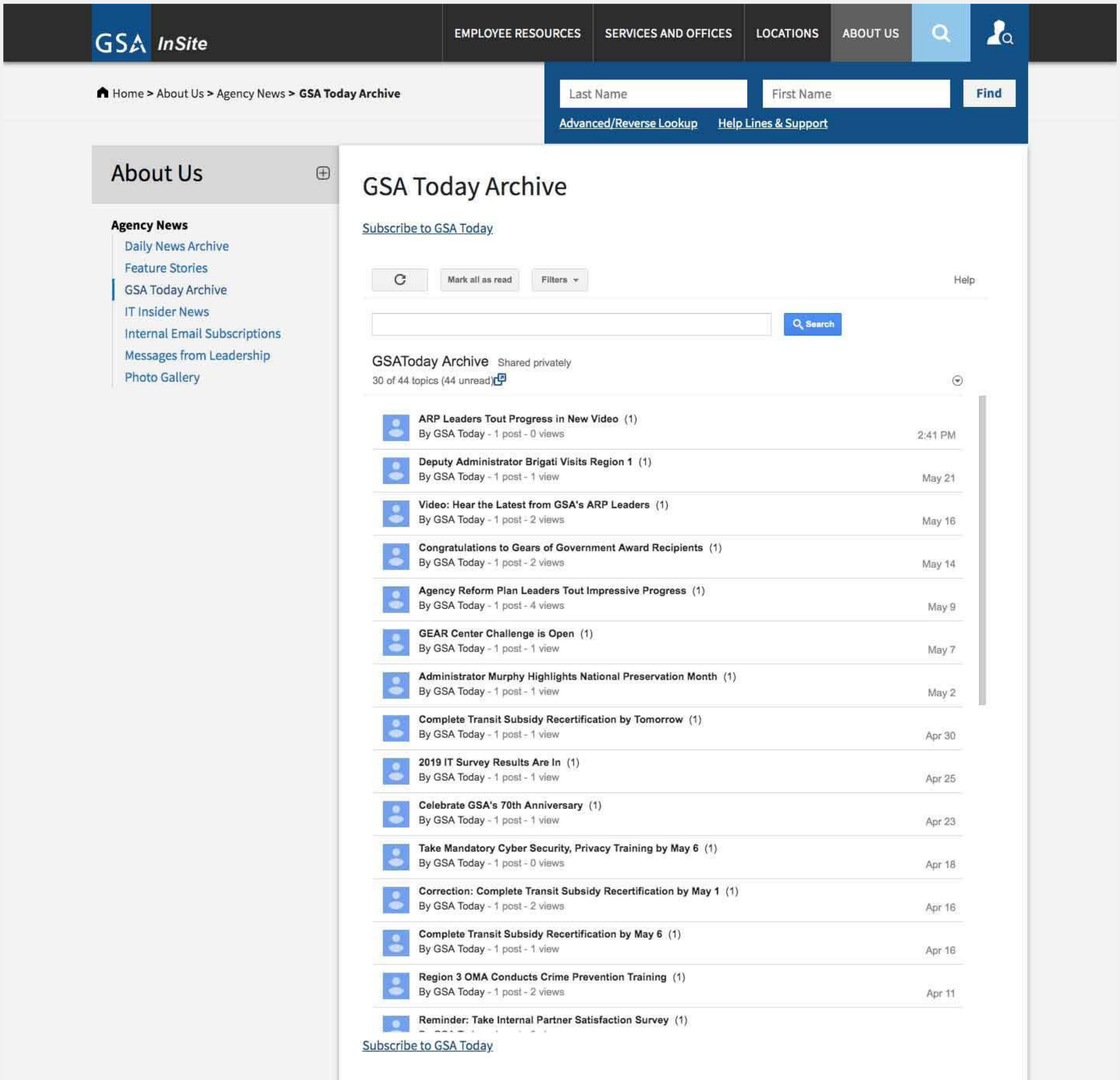
> "This *Stuff You Should Know* I usually click into. Sometimes the city email will beat me to it, and that seems to be the same stuff or links. I do glimpse at it. I'll read new employee profiles, and I may go in and read about it if it's of interest to me."

Another user attempting the same task said:

> "This is something I try to read at least to see what's happening every week. So, there have been occasions where I thought I saw something and didn't know where I saw it. I search in my email because the words pick up more quickly and easily there than using the intranet. After I find what I need in my inbox, I click through it to land on the intranet."

While email newsletters are a great tool to deliver news directly to employees and keep them aware and informed of what's going on, avoid overloading employees' inboxes with *too many* different types of email newsletters. One or two, at the most, should suffice. Any more than that, and you risk employees tuning out or ignoring the various email newsletters entirely.

At the General Services Administration, employees knew that news stories were available on the intranet's *GSA Today Archive* page, yet one user reported reading stories via email rather than accessing news on the intranet. Employees appreciated that a link to *Subscribe to GSA Today* was available within the news section, where employees could sign up to receive email news sent directly to their inboxes.




*The General Services Administration included several types of news content on its intranet. From within the archive, which listed all news, employees could subscribe to get news sent directly to their inboxes.*

## 29. Include a link so employees can share ideas for news and submit news articles.

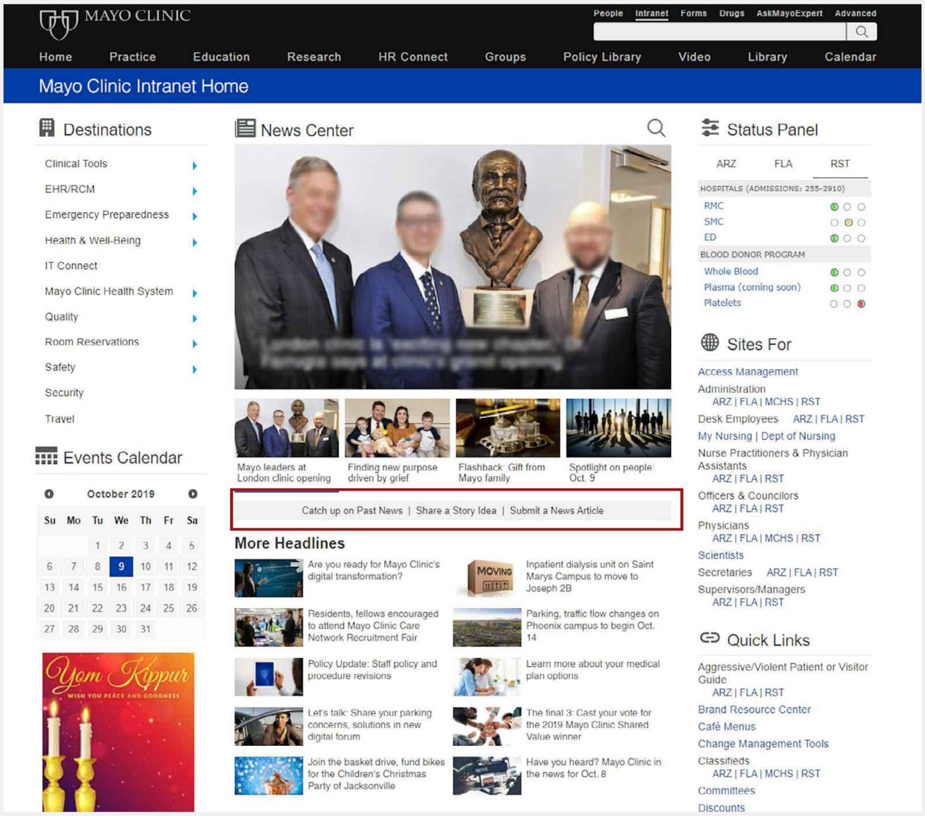
One of the best ways to generate new, unique, and engaging ideas for news stories is to collect suggestions directly from employees on the intranet. If your intranet is following a distributed content-management model, where employees across the organization are encouraged to contribute content, you may not only collect *ideas* for news stories, but you may also want to enable employees to post news stories directly on the intranet. If so, we recommend having a team review these stories for accuracy, formatting, and structure before pushing them live.

For example, the Mayo Clinic followed a hybrid approach to intranet content management, where employees could suggest ideas for news stories and also submit news articles they wrote directly on the intranet. Offering both options ensured that content creators on the central intranet team always had new ideas for news stories coming directly from employees, even if those employees didn't want to write the full articles themselves.

After an employee submitted an idea, intranet team members prioritized, assigned, and executed the ideas. Then, after they wrote the news articles, they went into the scheduling queue.

After an employee submitted an article, the central intranet team reviewed and properly formatted the news story before it was scheduled and posted. This workflow ensured the news stories followed the Mayo Clinic's content standards, had complete and coherent metadata, and were scheduled according to the team's content calendar.

Contributors also had the opportunity to review their articles before they were published. That way, they could see how the final version looked before going live and learn what to do differently next time to better adhere to the Mayo Clinic's content standards. Credit was always given to the employee who originally submitted the article. For article ideas, credit was often shared between the idea contributor and the intranet team member who wrote it.




*Employees at the Mayo Clinic could share an idea for a news story or submit a full news article through a link located close to the featured news on the intranet's homepage.*

### Ensure the forms used to collect ideas and news stories are easy to use.

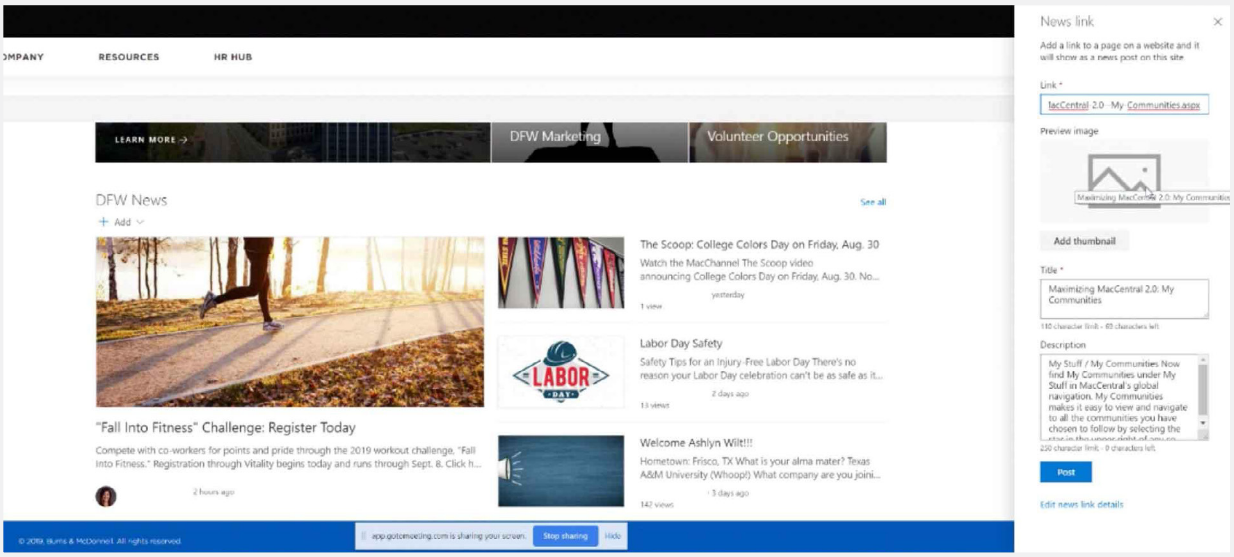
**Process and Strategic Considerations**

Employees often have varying degrees of technical aptitude, but that shouldn't discourage them from sharing a news story or idea on the intranet.

As such, the forms and fields used to collect news articles or ideas from employees must be simple to fill out. Clearly mark required fields and only include controls that are truly needed to collect the content and ideas in the form.

Burns & McDonnell followed a distributed content-management model, so employees across the organization could freely submit news within a set of clearly defined requirements. Employees authorized to post news saw a contextually relevant *Add* link throughout various parts of the intranet where they could do so.

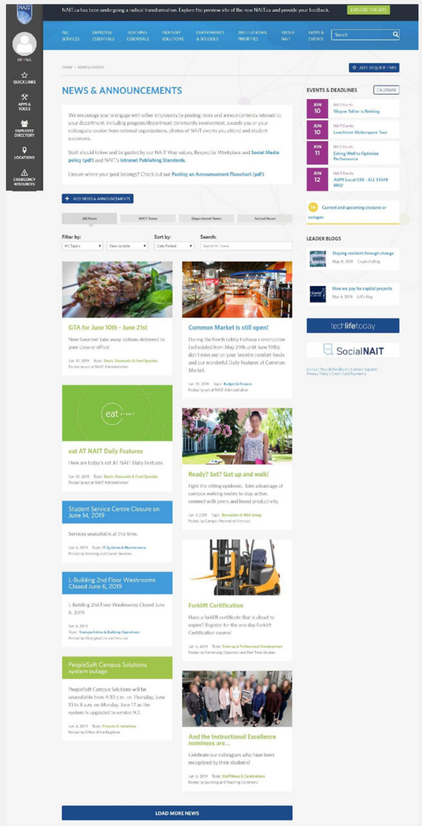
On click, a simple form appeared that allowed publishers to include a link, an image, a title, and a description for the news item. Employees could also edit the news item's more elaborate details. The required form fields were clearly marked, and character limits were displayed, including how many characters the content creator had left to type before they reached the character limit. This attention to interface details helped ensure that news stayed concise and to the point and that the required elements, such as a title and a link, were complete.




*Burns & McDonnell followed a distributed content-management model for its intranet, which meant employees could freely post news in designated areas. Simple, easy-to-use forms enabled this for all employees.*

The Northern Alberta Institute of Technology also allowed employees to freely submit news on the intranet. Helpful guidance appeared just above a prominent button that invited employees to *Add News and Announcements*. This guidance helped employees feel confident, knowing they followed the proper publishing standards and procedures. A flow chart also described each type of content and provided information about its purpose. It informed employees about where their post belonged and which type of content to use. The favorable copy on this page read:

> We encourage you to engage with other employees by posting news and announcements relevant to your department, including program/department community involvement, awards you or your colleagues receive from external organizations, photos of NAIT events you attend and student successes.
>
> Staff should be guided by our NAIT Way values, Respectful Workplace and Social Media policy (pdf) and NAIT's intranet publishing standards.
>
> Unsure where your post belongs? Check out our Posting an Announcement Flowchart (pdf).



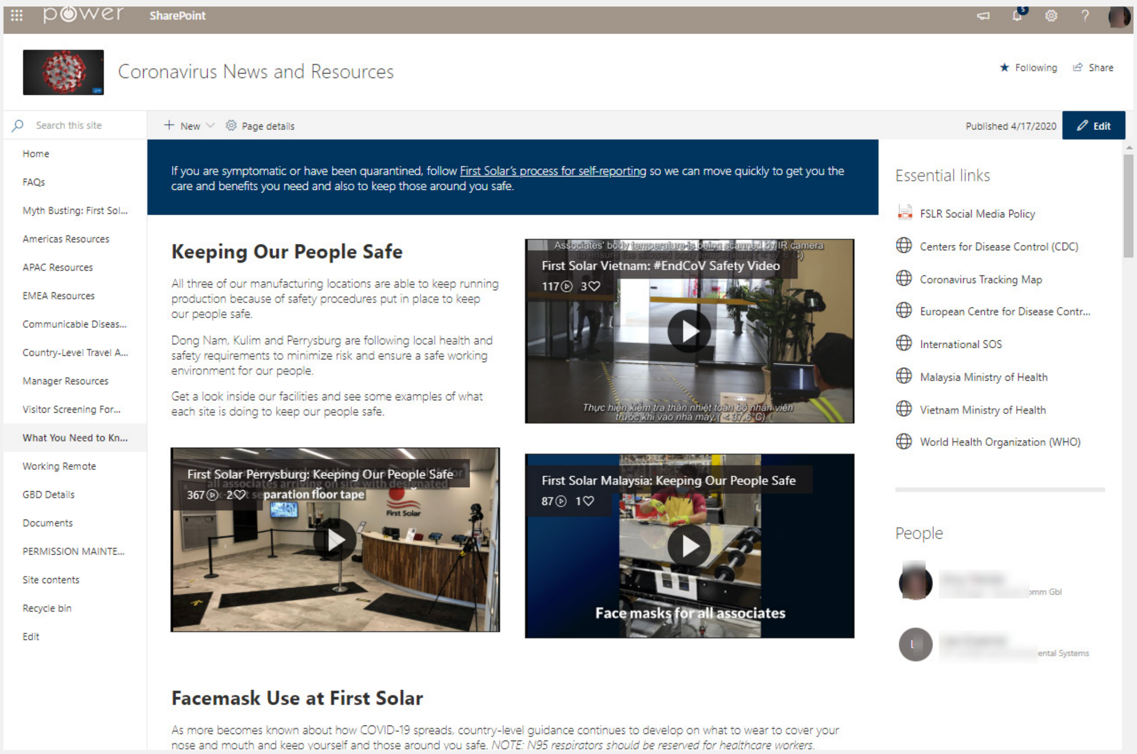

*The Northern Alberta Institute of Technology allowed employees to submit news and announcements directly on the intranet. Nearby where employees could initiate this task, helpful guidance and publication standards appeared, which was excellent.*

## ALERTS AND EMERGENT INFORMATION

### 30. Use alerts and place them in highly visible areas to relay urgent information or critical actions employees must take.

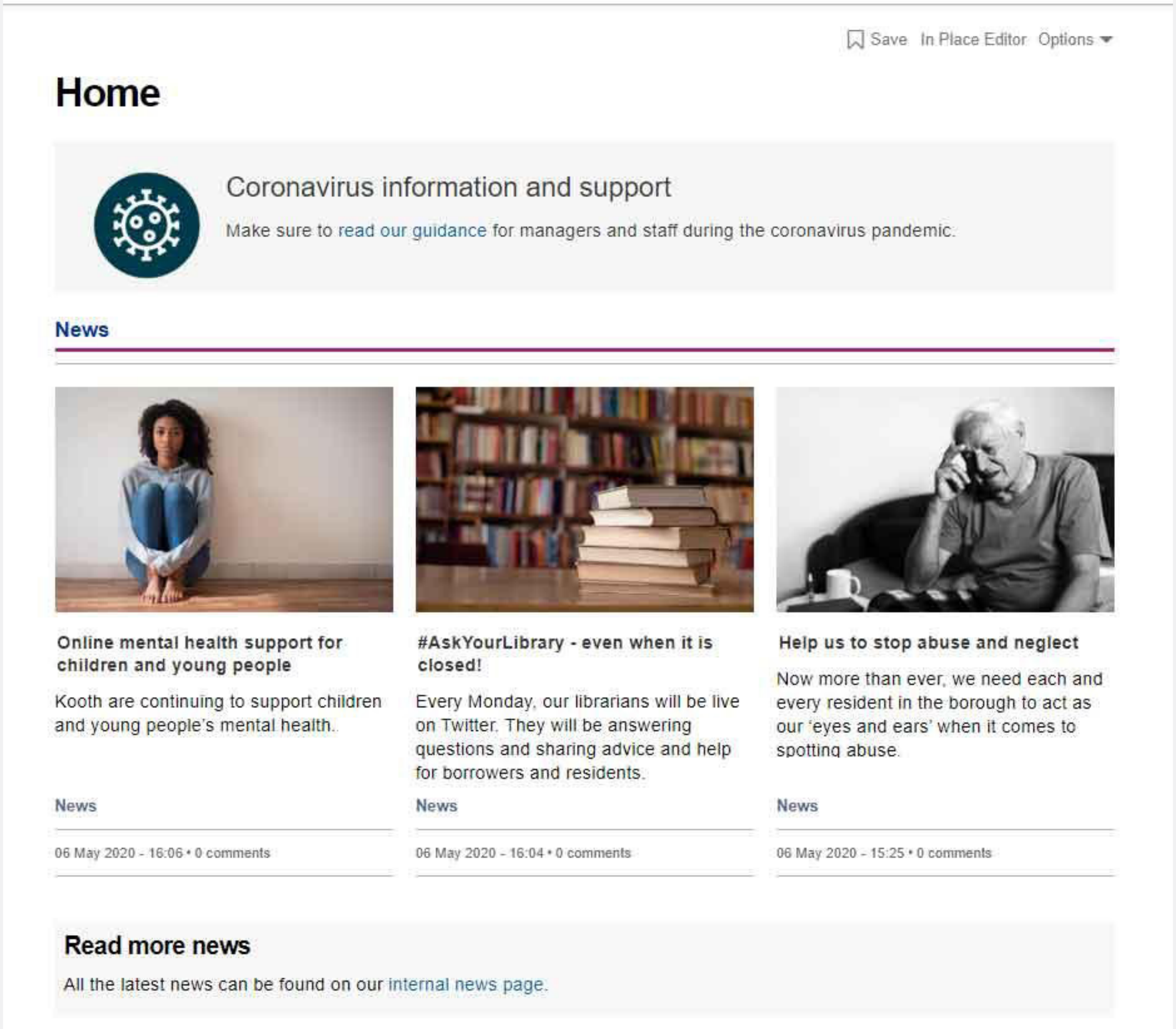
Incorporating alerts on an intranet is an effective way to communicate urgent information or critical actions employees need to take. As a content type, alerts are defined as any short, critical messages displayed in highly salient spaces and visually prominent ways, making them hard to dismiss or ignore. In the designs we studied, sometimes employees could dismiss alerts, while in other cases, the alerts remained to ensure visibility. Alerts were often reserved for use cases when many employees needed to be made aware of organizational happenings, such as in emergency situations or moments of rapid change.

For example, during the COVID-19 pandemic, many organizations used designated alert spots on the intranet to communicate key messages as the situation unfolded and employees began working remotely. Approaches varied, but many alerts resembled brightly colored text boxes, placed either directly at the top of the intranet or just below or near the main navigation. The most sophisticated alerts allowed for personalized messages based on the employee's role within the organization or where they lived. For example, a blue alert banner sat on top of First Solar's Coronavirus site homepage and communicated what employees should do if they had symptoms of COVID-19.



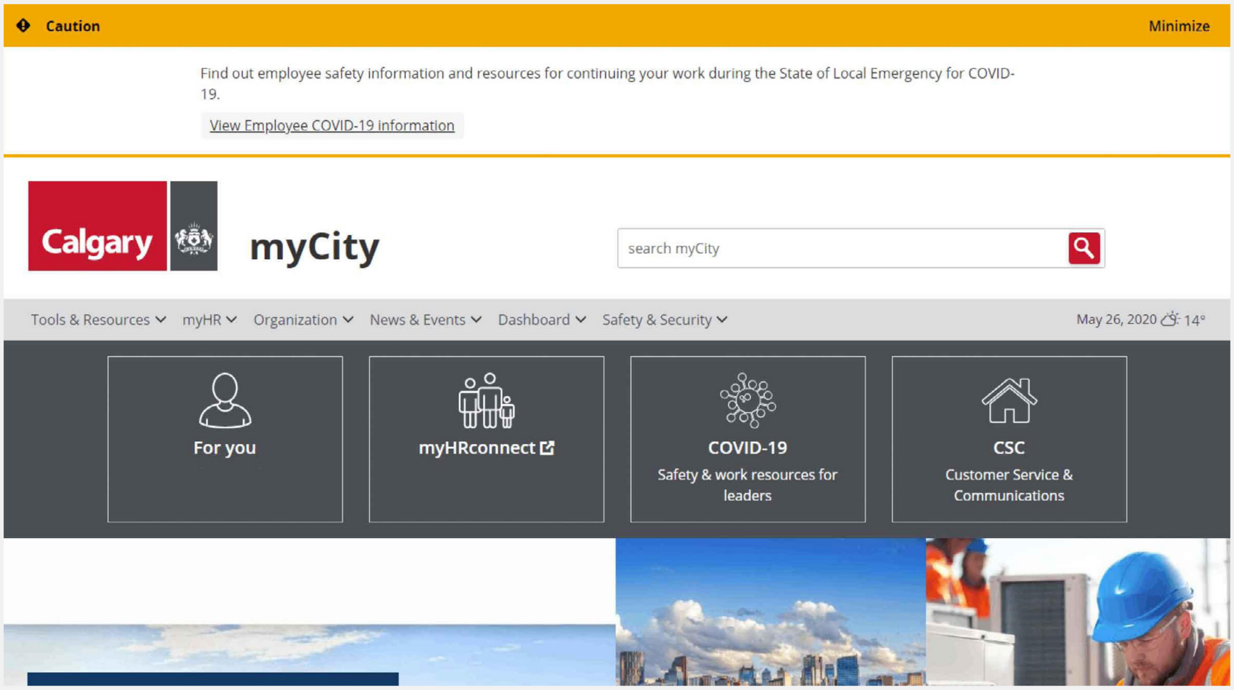

*First Solar used a navy blue alert at the top of the intranet to communicate what employees should do if they have COVID-19 symptoms.*

Bracknell Forest Council also used an alert at the top of its intranet to make employees aware of the new *Coronavirus information and support* area. The alert was prominent, offering context and a direct link to the space. Because this alert needed to remain for several weeks, employees did not have the option to dismiss it.




*An alert containing a direct link to the* Coronavirus information and support *section appeared on the homepage of Bracknell Forest Council's intranet.*

The City of Calgary used a site-wide alert banner to promote the COVID-19 section. The team also configured the *For you* employee bar and *Quick Links* tiles at the top of the intranet's homepage. This space detected if users were management, leaders, or staff and delivered contextualized COVID-19 content specific to each user group quickly and easily, based on their role in the organization.




*The City of Calgary used an alert bar across the top of all intranet pages to drive awareness and traffic to Coronavirus information. The alert information was contextualized based on the employee's role — staff member, manager, or leader.*

In addition to the pandemic, there were other reasons why having alerts on the intranet was important. For example, the Northern Alberta Institute of Technology had an emergency notification system integrated with its intranet. In case of an emergency, an alert and notification posts to the intranet, the staff portal, and its public-facing website. Though the team said they don't have to use it often, but in case they do need it, it's available.

**Employees may not always know what to do in an emergency.**

User Behaviors

During our study at the GSA, there was a tornado warning. We observed employees wondering about the weather and the campus bus schedule during this time since many had meetings in different buildings.

The storm hit near the end of the day, so naturally, employees didn't know if they should take the threat seriously or keep working and disregard the tornado. The intranet didn't have a way to alert the entire office to take shelter, and there was no single source of information, which left employees with no choice but to make their own decisions.

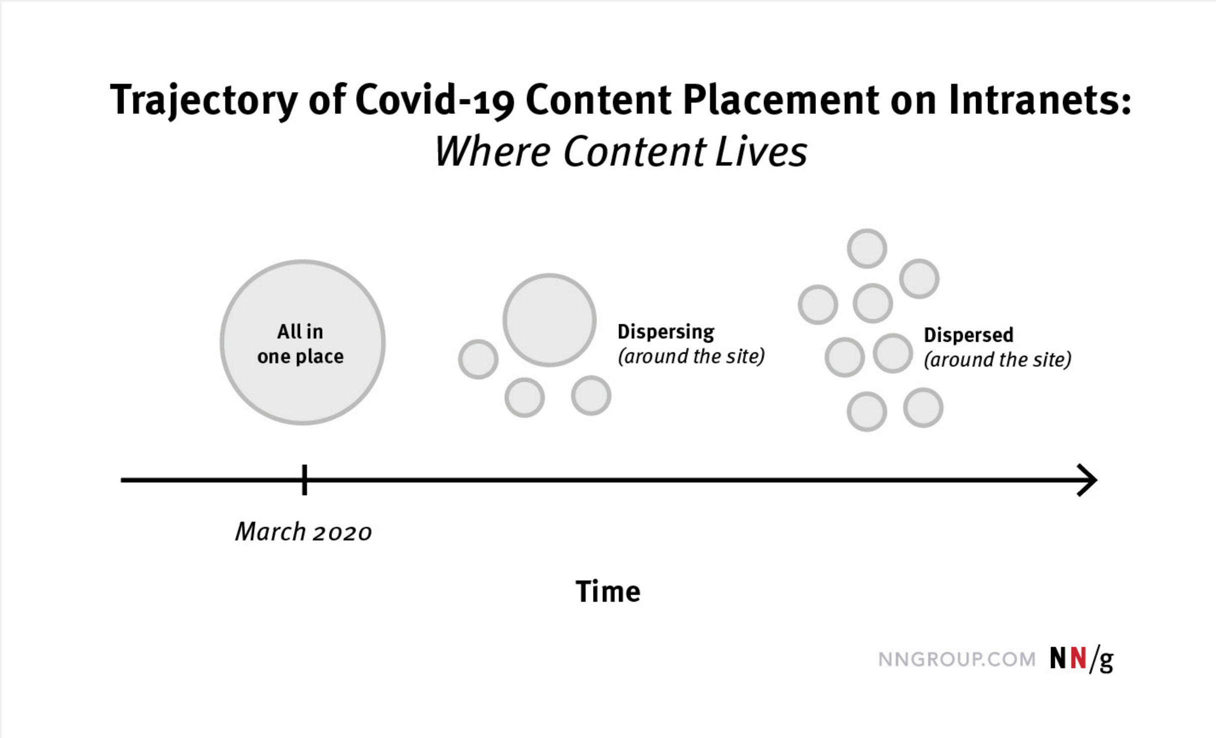
Luckily, the storm wasn't too bad, and no one was hurt, but this is one case where having an alert system on the intranet would have been helpful and could have helped protect employees had the storm been worse.

## 31. Use a dedicated section along with contextually relevant, integrated content to communicate emergent information.

We spoke with intranet teams and reviewed examples of the intranet content they used during COVID-19 to help craft this guideline about communicating emergent information. Though the examples in this guideline primarily relate to the pandemic, they also apply when an organization needs to widely communicate information that deals with change management in an ever-evolving situation.

The two main strategies intranet teams used for introducing new content about the pandemic included:

- **A dedicated section:** A team using this approach puts all or most of the information on one or a few pages on the intranet. They included this section in the intranet's IA and main navigation and promoted it using a linked banner or alert from the homepage. Once in the section, employees could find short descriptions and links to various content types. Some components allowed engagement with content directly on the page or took users to subcategory pages about specific topics.
- **Integrated contextually relevant content:** Teams using this approach distributed smaller, contextually relevant pieces of **microcontent** around the intranet, pacing it in areas where it related to existing content, such as in the HR or information technology sections. If needed, this content was usually cross-linked with the main section's landing page or a related subcategory page where employees could learn more.




*Emergent content often lives in its own section of the intranet first. Then as time progresses, it evolves to become more distributed as smaller pieces of information are placed in contextually relevant areas.*

**Microcontent (also known as microcopy)**

Microcontent consists of short text fragments or phrases, often presented with no additional context. Its purpose is to communicate key messages in a concise form.

First Solar launched a *Coronavirus News and Resources* subsite section on its intranet using SharePoint's modern interface and updated content frequently, which employees appreciated. The homepage of this subsite linked to many helpful resources, including stories about how to stay healthy while working in a manufacturing plant, office, or home. Other impactful topics included:

- Facemasks at the organization
- Making sanitizer to meet safety needs
- Keeping the manufacturing facility open
- Videos of safety practices at the sites
- Self-reporting symptoms and when to quarantine

- Coronavirus-tracking map
- Information from health authorities, including from:
  - World Health Organization (WHO)
  - US Centers for Disease Control (CDC)
  - European Center for Disease Control
  - International SOS
  - Malaysia Ministry of Health
  - Vietnam Ministry of Health

A senior manager from the company's global internal communications department said:

> "We needed a site that was a one-stop-shop for coronavirus news and information. It resides within our intranet and is accessible to both associates and contractors. The information was coming in fast, and this solution gave us the ability to consolidate everything people wanted to know in one place."

## Avoid leaving permanent information in temporary places.

Process and Strategic Considerations

Teams may have started out thinking coronavirus content would be temporary, but that wasn't the case. As circumstances evolved, many organizations needed to develop lasting processes and procedures to support a new normal. This process included finding more permanent homes for content initially assumed to be short-lived. For example, an important policy may have originated as a news item, living in the *News* section; however, if left unchecked, it could remain in the *News* section forever, meaning it would never be updated, moved, or linked to or from related pages.

Or a team may create a helpful tool and house it in a SharePoint site rather than moving it to a place on the intranet where all employees can easily find it.

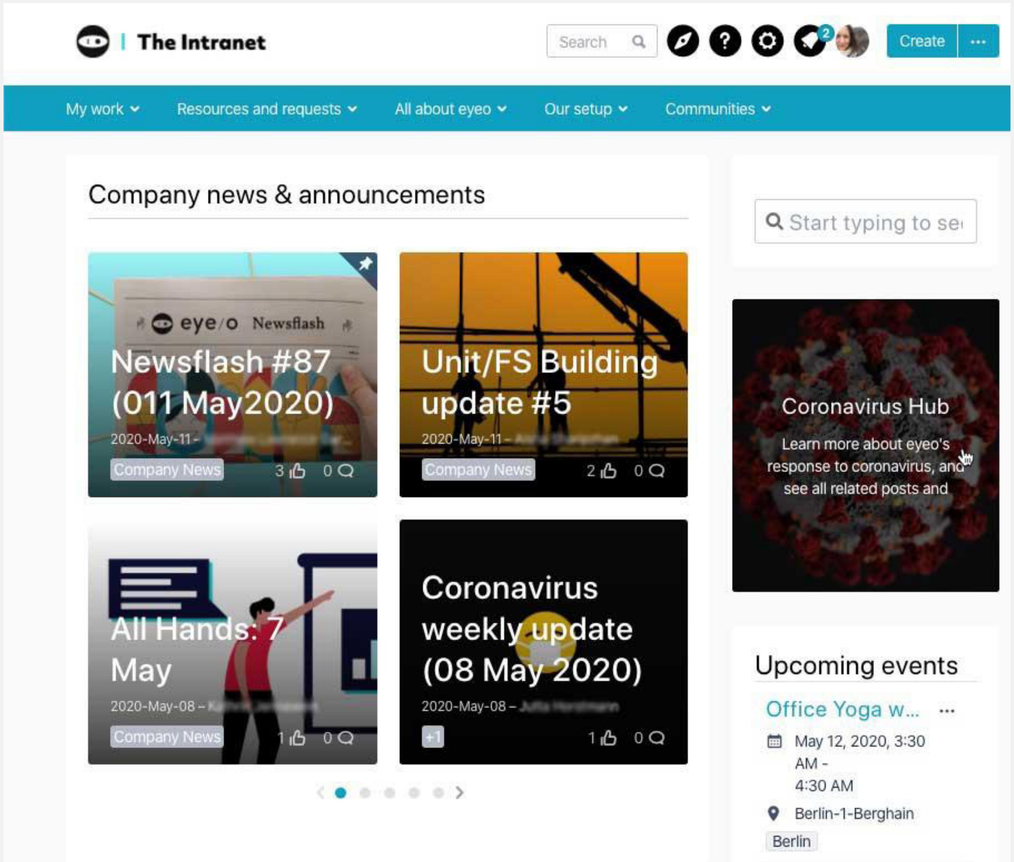
If there is no plan for moving temporary content to a more permanent, logical, findable format and location, employees will miss out on important information or tools that could increase productivity, safety, sales, or customer loyalty. Additionally, without this plan, employees may refer to old, inaccurate, or outdated information and grow frustrated at the wasted time.

Even worse, employees might make serious mistakes such as giving customers the wrong service or information, or expose individuals and the organization to safety and legal issues. Determine when content needs a more permanent home on the intranet.

Should those online-meeting tips from the announcements page move to a section about effective tool use? Will you have teams share their safety videos about topics beyond COVID-19, and if so, where will those videos be most findable on the intranet? Will you keep doing group meditation sessions, and if so, where will the schedule go when the coronavirus page is not necessary anymore?

Considering these questions will help you advance your content strategy so that content once regarded as emergent and temporary, becomes an easy-to-find and maintain mainstay as it moves to a more permanent place on the intranet.

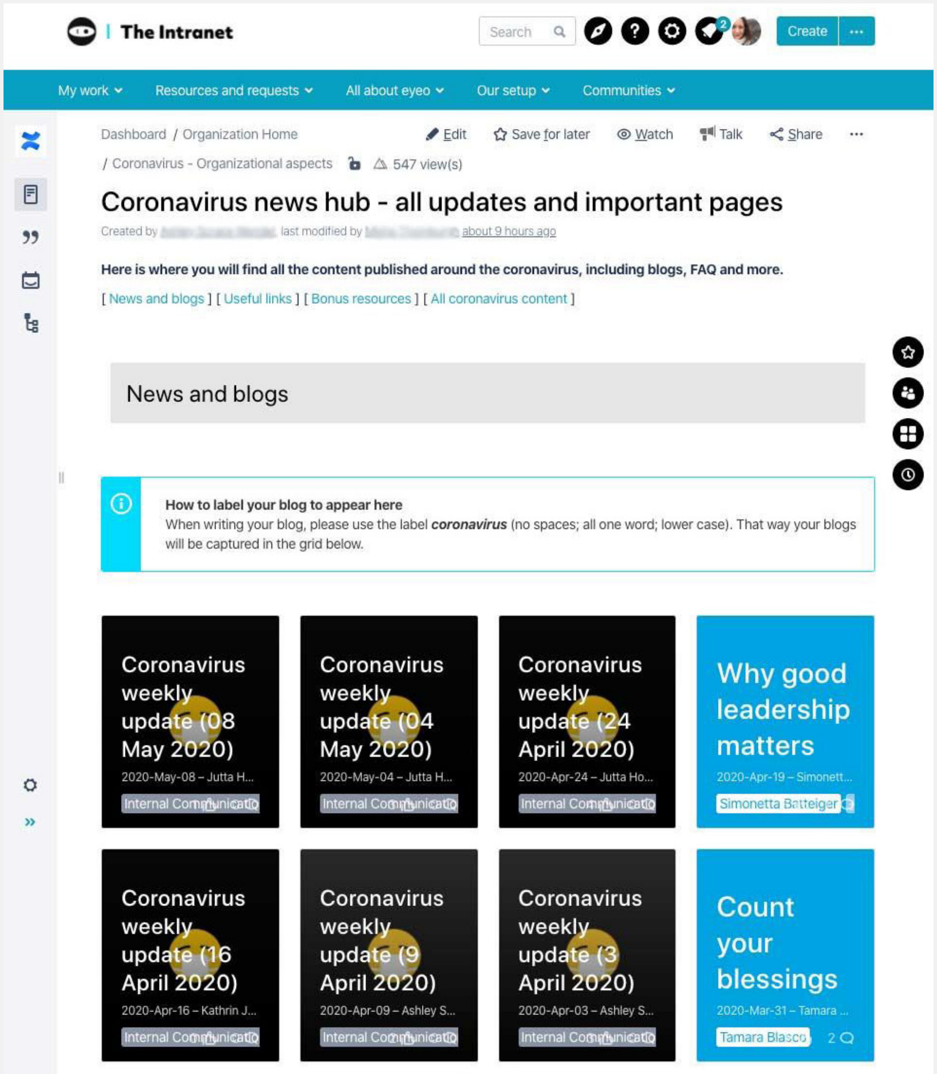
Eyeo GmbH dedicated an entire section of its intranet to communicating information about COVID-19 and used banners placed in contextually relevant areas, such as on the homepage and the *Company news & announcements* page, to create awareness and drive traffic to the section.




*In addition to having a dedicated COVID-19 section, Eyeo GmbH incorporated coronavirus content across its intranet wherever it was contextually relevant. They used smaller pieces, such as weekly updates and banners, to promote the section on the* Company News and Announcements *page.*

Employees could find all the content published about the coronavirus within the section, including blog posts, frequently asked questions and more. Because Eyeo followed a distributed model of content management, where employees could freely contribute content, a helpful hint on the page informed employees of how to label their blog posts with *coronavirus* so that the posts would appear as a card in the grid on the page.

Additional helpful links such as *security and privacy rules*, *tips for keeping your sanity*, and *rules and guidelines on sickness* were also included here. Bonus resources such as first aid and parenting advice, a remote facilitation toolkit, and remote-friendly games were located at the bottom of the page. This approach helped employees efficiently find everything they needed in one place, whether they navigated here directly or from another area of the intranet. Through this depth and breadth of relevant content, Eyeo demonstrated they truly cared about keeping employees informed, cared for, and in good spirits during an unpredictable time.




*In addition to contextually relevant, integrated content, Eyeo also used a dedicated section to house all information related to COVID-19. This one-stop-shop approach helped employees efficiently and reliably find what they needed.*

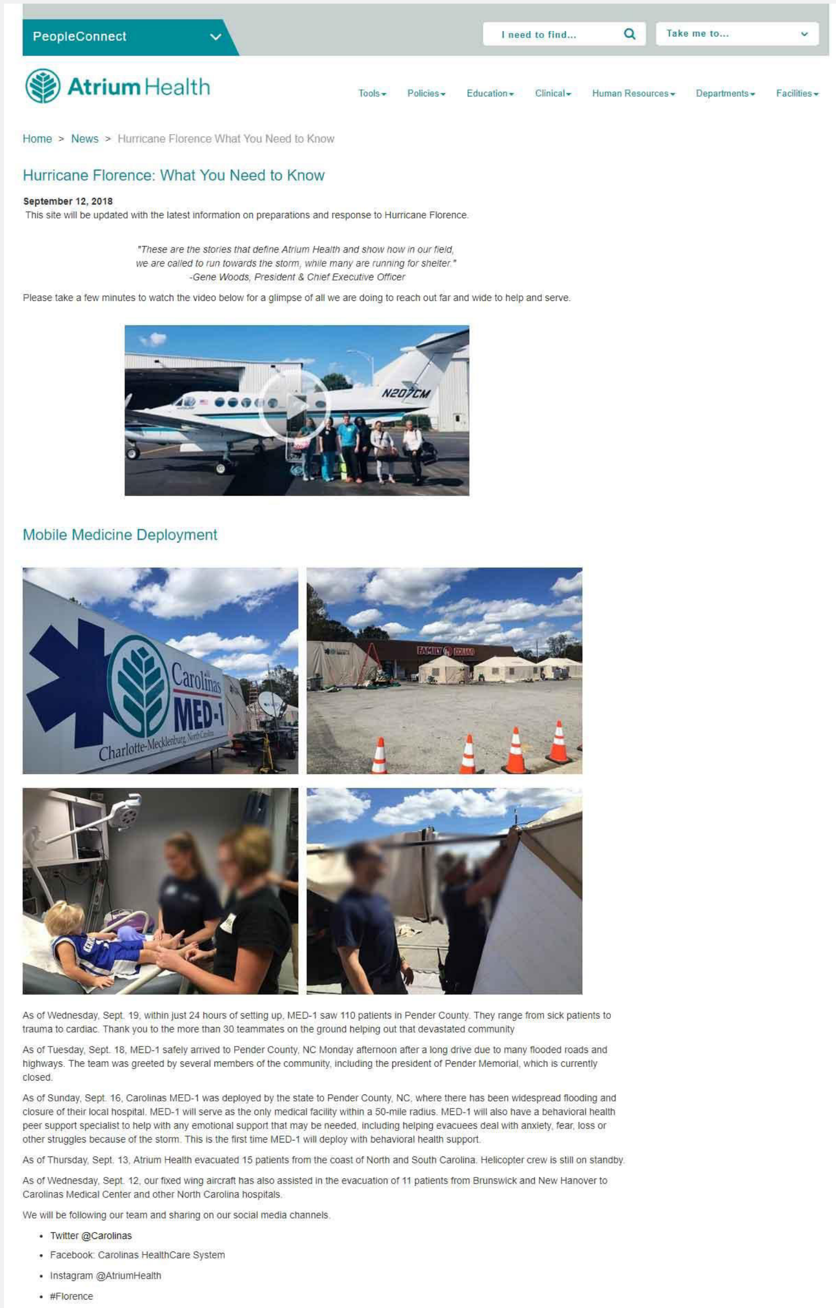
### Complete metadata is critical for pages communicating emergent information.

**Process and Strategic Considerations**

Ensure metadata (keyword or topic tags, page titles, and meta descriptions) is clear and complete on pages that share key content about ever-changing situations. This is important so employees can find the correct information quickly and confidently via intranet search.

The COVID-19 pandemic wasn't the only time an intranet was used as part of a content strategy to communicate emergent information quickly. Atrium Health created a dedicated section of its intranet when Hurricane Florence hit North Carolina in 2018. The section was updated regularly with the latest news to keep employees aware of the preparation efforts and response to the hurricane. An impactful quote from the CEO was displayed at the top of the page, along with an engaging video about how Atrium Health was contributing to the overall community, care, and cleanup during the crisis.

Below, on the same page, daily updates outlined patient volumes and activities. Social media channels were also promoted so employees could follow along in real time. The images that accompanied the text worked well to reinforce the messages and instill a sense of pride among employees.




*Atrium Health set up a dedicated section on its intranet when Hurricane Florence hit North Carolina. Users could rely on this space as a single source of truth for updates and information, while smaller pieces of contextually relevant content were displayed across the intranet.*

## EVENTS

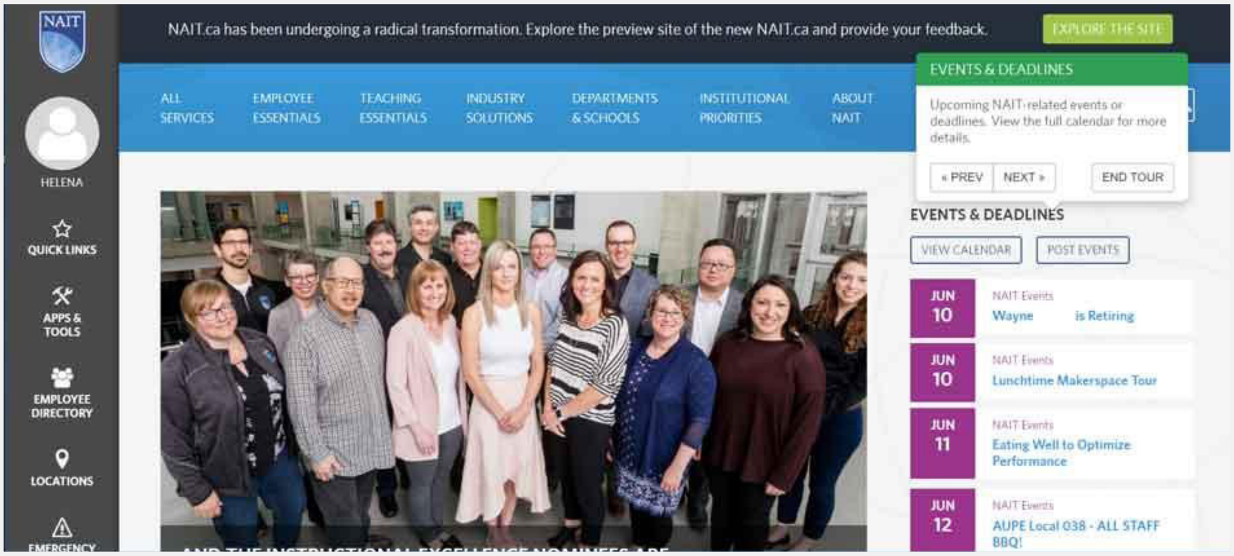
### 32. Provide a list or calendar on the intranet where employees can learn about company-wide events.

Employees often want to know what events are taking place in an organization. Knowing what's happening gives them an opportunity to attend, participate, or get involved with the group putting on the event. So, it's helpful to have a central page on the intranet, with a list or calendar view, where employees can see what events are happening, along with when, where (virtual or in-person), and how to sign up.

Even if employees can't attend an event, it's nice for them to know the company is offering this type of engagement or providing opportunities for them to benefit from information, education, or personal or professional growth initiatives. Events can range from all-company meetings to training opportunities, health and wellness events, cultural, diversity and inclusion events, recreation or intermural events, and more, depending on the size and culture of the organization. Events also offer a great opportunity for employees to meet and engage with one another. Whether related to their work or mutual personal interests, events help to enrich the employee experience.

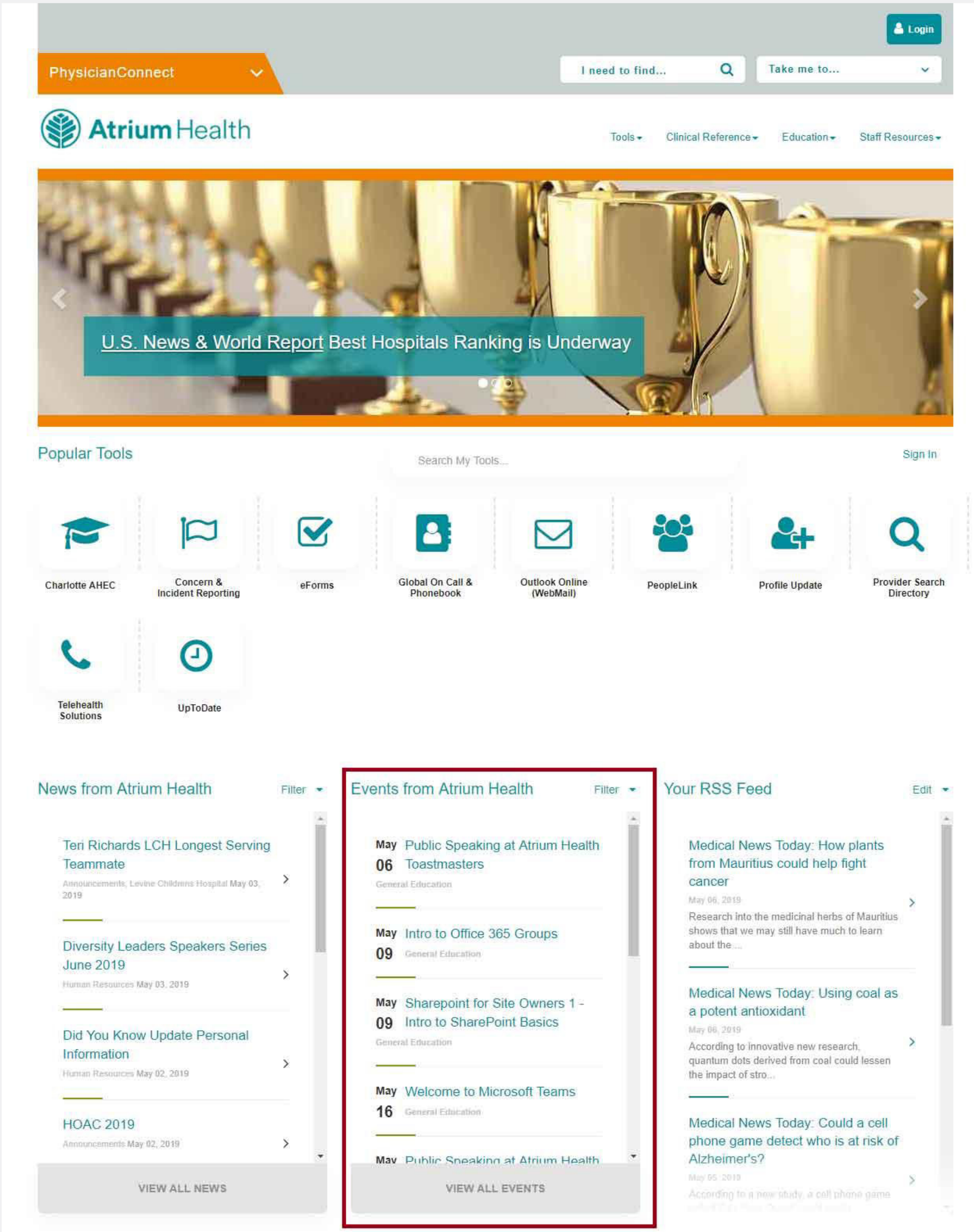
It's usually best to display events happening in the current month, either in one main list, or on a master calendar page, with links to it from the homepage, navigation, and other contextually relevant areas of the intranet. On highly visible areas of the intranet, such as on the homepage, it's acceptable to list only the upcoming events happening that week, with a link to view all events.

For example, the Northern Alberta Institute of Technology used a series of introductory prompts to show users where they could find events on the homepage the first time they logged in. Buttons that allowed users to view the full event calendar and post an event also displayed in this area.



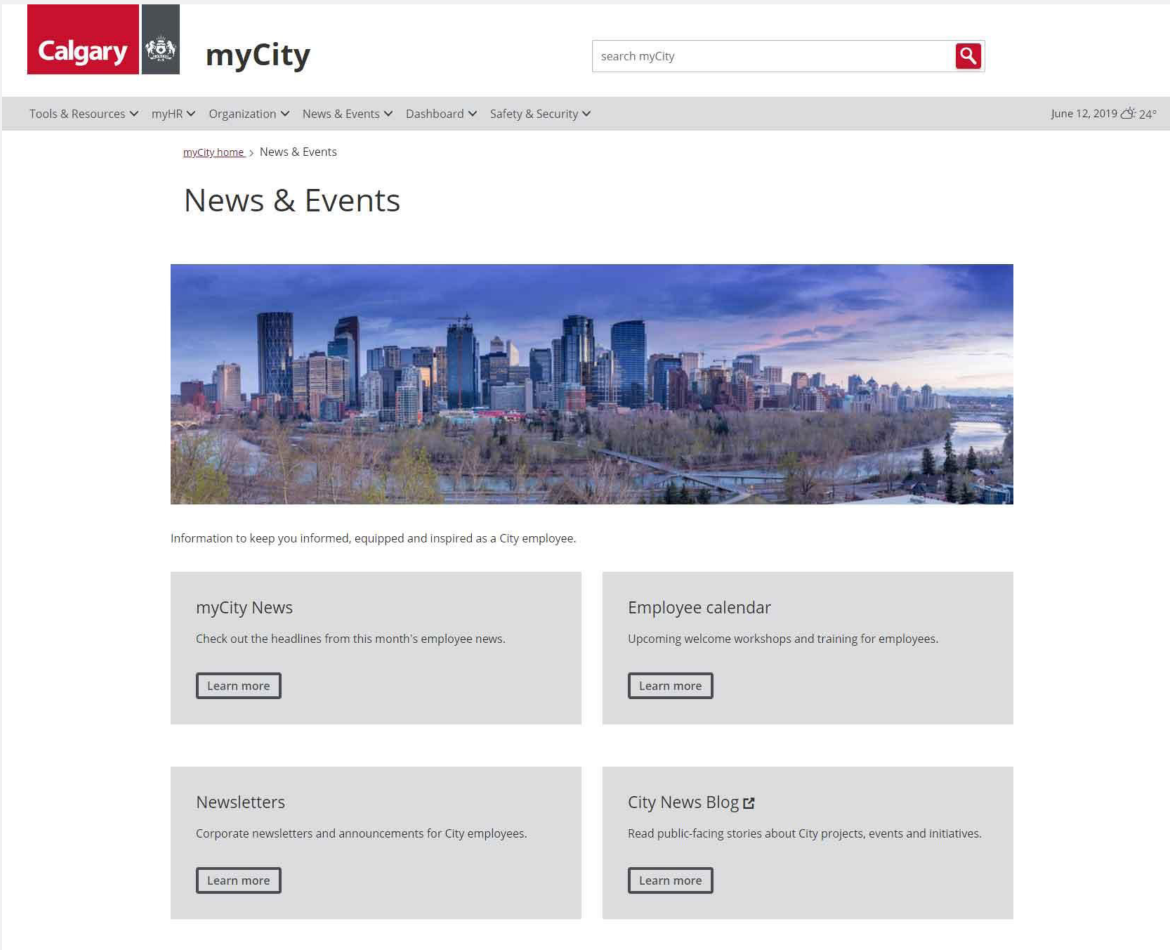

*An introductory prompt on the Northern Alberta Institute of Technology's homepage showed users where upcoming NAIT-related events and deadlines appeared. The message also encouraged employees to view the full event calendar for more details, which was favorable.*

Atrium Health used a scrolling listbox on its intranet homepage to house a list of events happening soon at the organization. Using a listbox here ensured many events could be displayed without taking up excessive screen space. Employees could filter the events to include only certain types of events in the listbox, and a prominent button at the bottom led employees to *VIEW ALL EVENTS*. This approach worked well for such a large organization that needed to promote many events at a time.



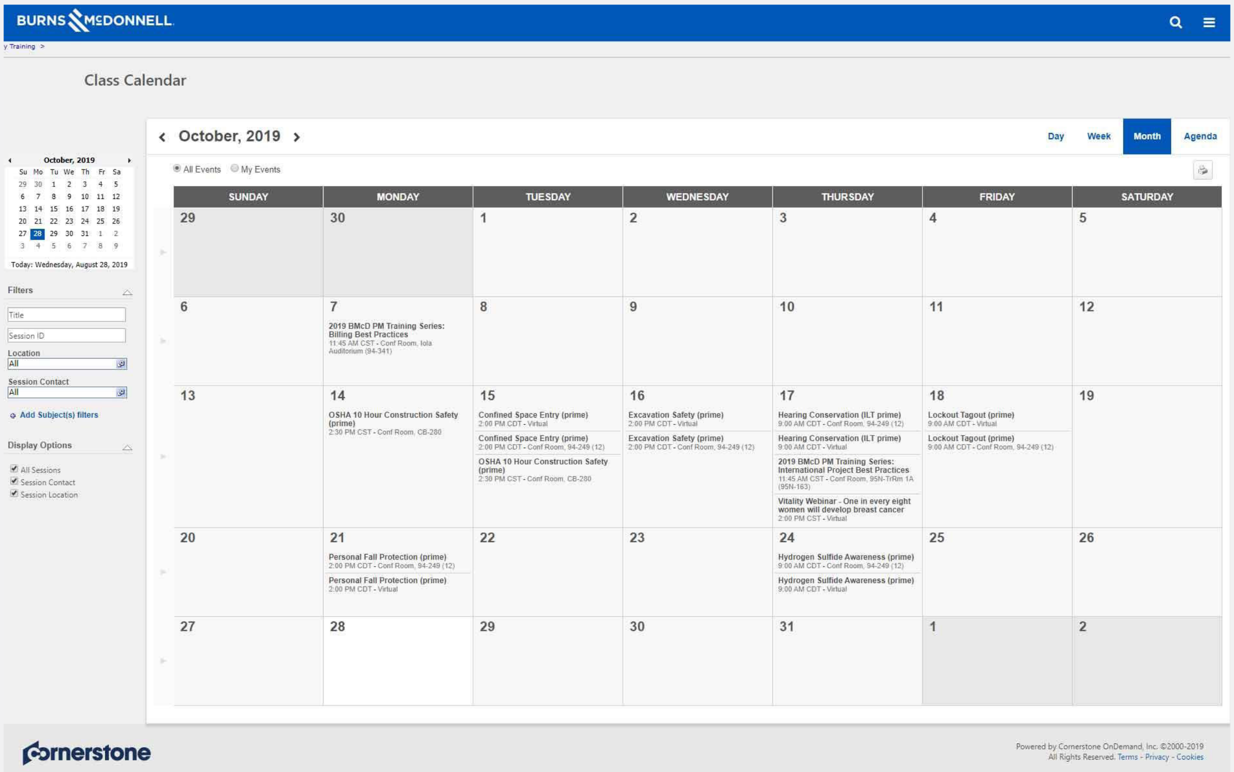

*On Atrium Health's intranet, a listbox on the homepage displayed upcoming events at the organization.*

The City of Calgary housed events within its intranet's *News & Events* section. Employees could access news, newsletters, events, and the *City News Blog from here*. Many of the organization's events were welcome workshops for new employees and ongoing training events. Because events aligned with the City of Calgary's goals of keeping employees informed, equipped, and inspired, it made sense that these content types were cross promoted.




*The City of Calgary housed events within its* News & Events *section, which was favorable, as both content types aimed to keep employees informed, equipped, and inspired.*

Showing a month of events at a time (at most) will prevent employees from becoming overloaded with information and align with realistic timeframes for them to plan to attend. For events beyond one month out, offer employees a way to discover these by using arrow buttons, a calendar picker to advance months, or a drop-down menu to select a specific month. Burns & McDonnell offered a specific calendar view for its training class events. Employees could see, at most, a month at a time, with the option to narrow the event view to a week or month if needed. Employees could also see events coming up in the subsequent months by clicking on the arrows next to the month and year at the top of the page.




*Burns & McDonnell offered a monthly calendar view where employees could view all upcoming training events.*

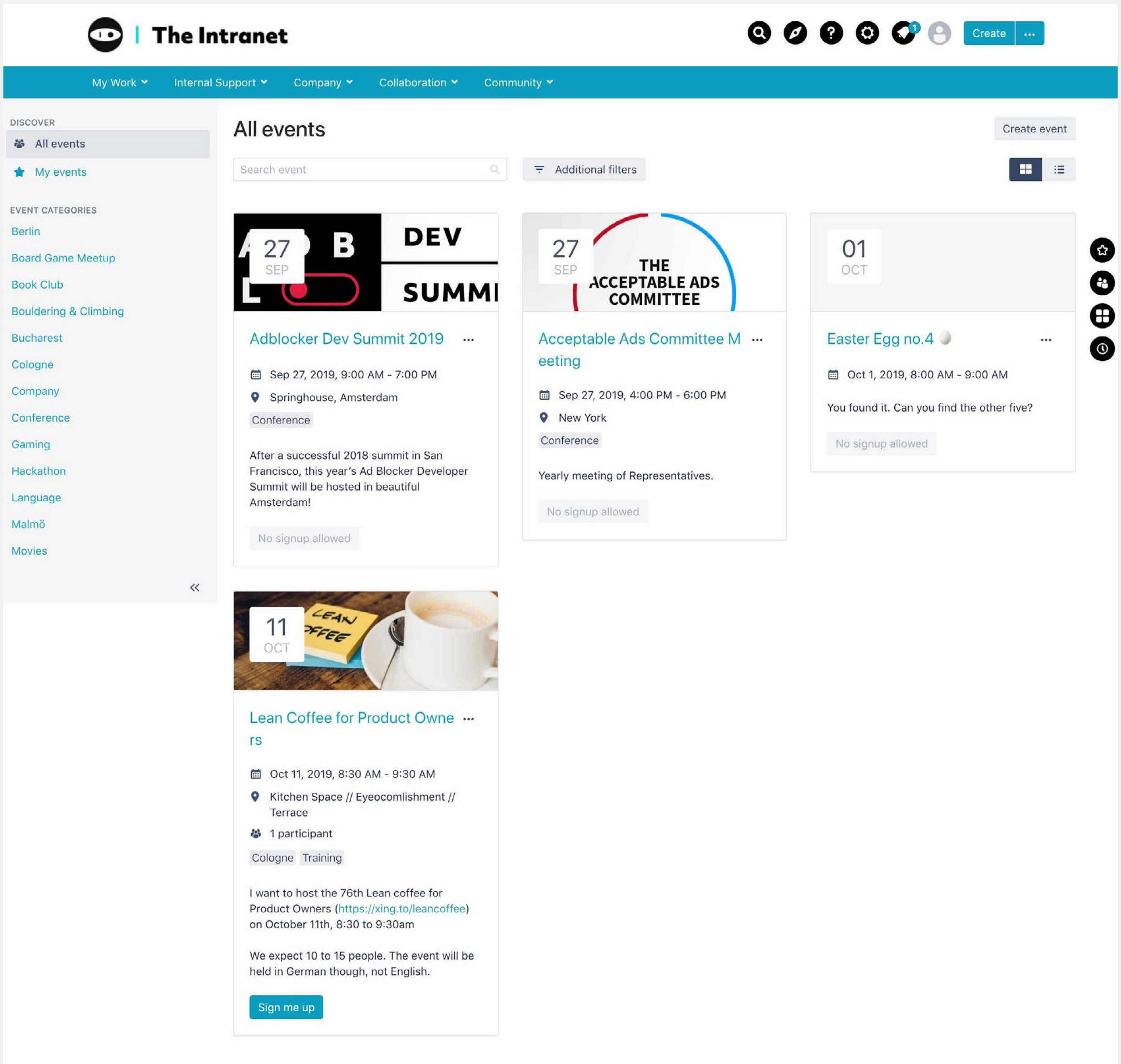
## 33. Include prompts to create an event from within the intranet's main *Events* section(s).

A content manager we interviewed at Eyeo described how much of her role was ensuring new hires were on track with their onboarding tasks, including attending certain events. She organized company events and retreats and used the intranet to inform people about what was happening and what people needed to know about the events.

At the time of our study, Eyeo's intranet was relatively new, but this user immediately noticed a calendar on the *All Events* page. The first unprompted activity she attempted was to create an upcoming event from this space, which she could easily do by clicking a button in the upper right corner of the all-company events calendar. Rightly so, the button was clearly labeled, *Create event*.

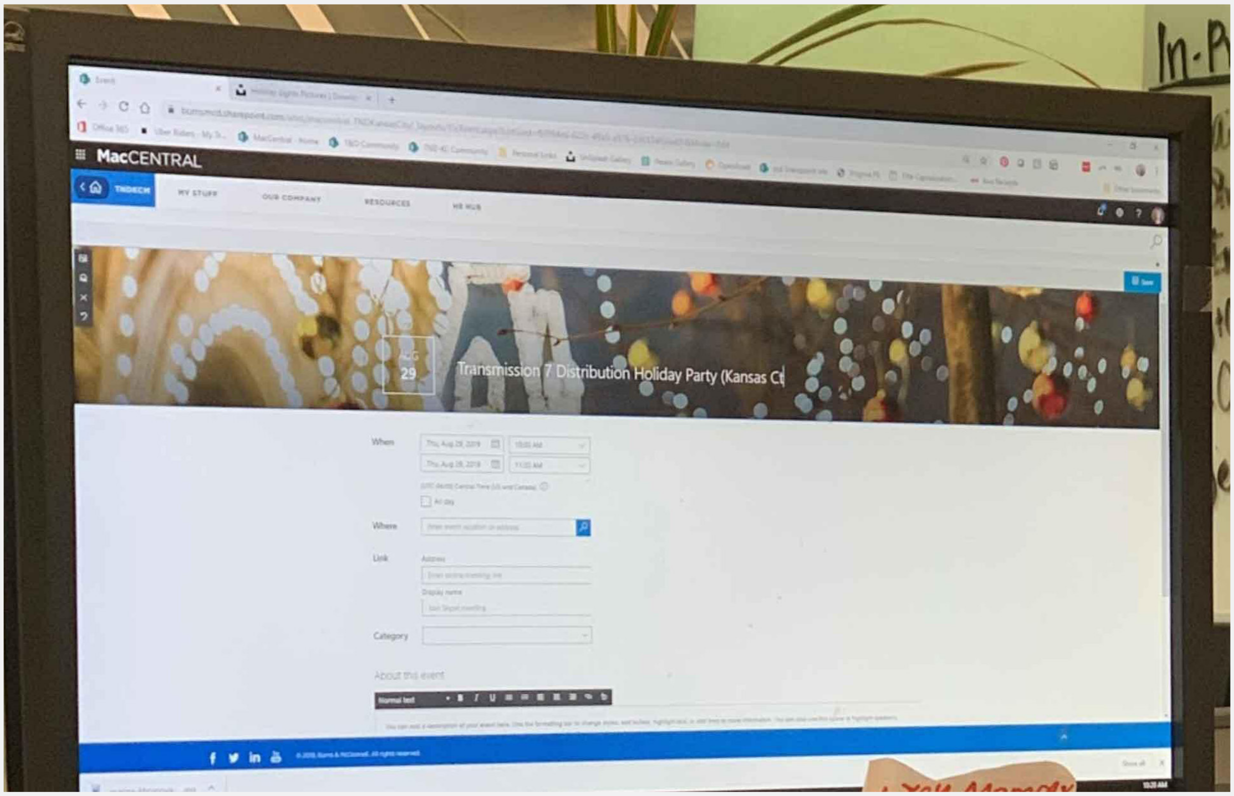
Each event on the *All events* page included a clear name for the event and a link to more details. An event date, time, location, event type, and a helpful description also appeared. For events that required sign-up, a *Sign-up* button was also displayed, which allowed employees to sign up for events they were interested in. Event administrators could easily fill out all of this information in a simple form and publish the event instantly.

Users could also search within events to find events that met their interests, and a list of event categories cascaded down the left side. On click, these categories showed only events that aligned with the chosen category, and event administrators could easily tag their events with these clear, pre-determined criteria. A star icon appeared in the event detail view, which allowed employees to mark the event as one of *My events*, which quickly saved it for quick viewing later.




*Event administrators could easily add new events to the* All events *page on Eyeo's intranet.*

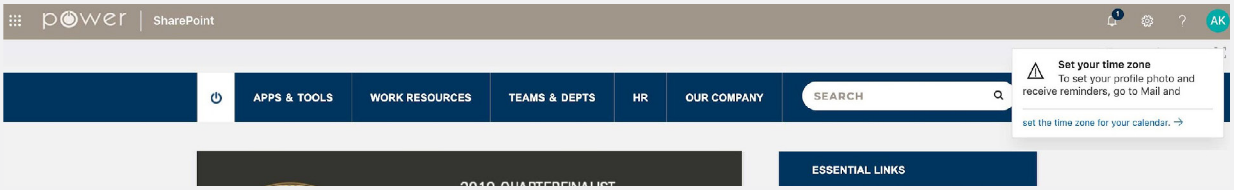
On Burns & McDonnell's intranet, the form to create an event was easy to use. Event managers could add a background photo, which would appear on the event detail page, and input when and where the event was taking place. A form field for a sign-up link or link to video conferencing also appeared, as did a category field for the event. This favorable approach made it very easy for content managers to add events.




*The form for creating an event on Burns & McDonnell's intranet was easy for content managers to use.*

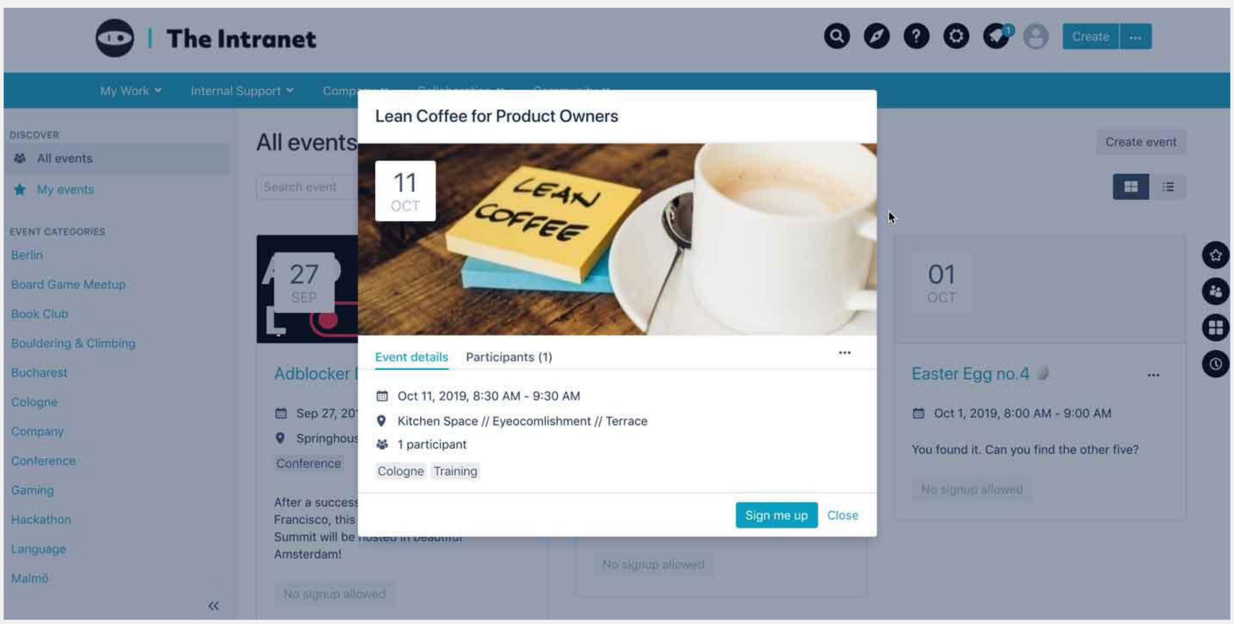
## 34. Offer an event detail view where employees can learn more about individual events and RSVP.

With individual event listings, clearly display the date, time, and location where events will happen. If your organization spans multiple time zones, list the start and end times in all the appropriate time zones for virtual events. If that's not possible, it's also acceptable to show the event's start time in one major time zone, where most people work, and then use messaging to indicate which time zone the start and end times are shown in. The most sophisticated intranets we've studied and reviewed offer automated time zone translation based on the employee's profile and knowing where they reside. This way, event times are always shown in the user's local time zone.

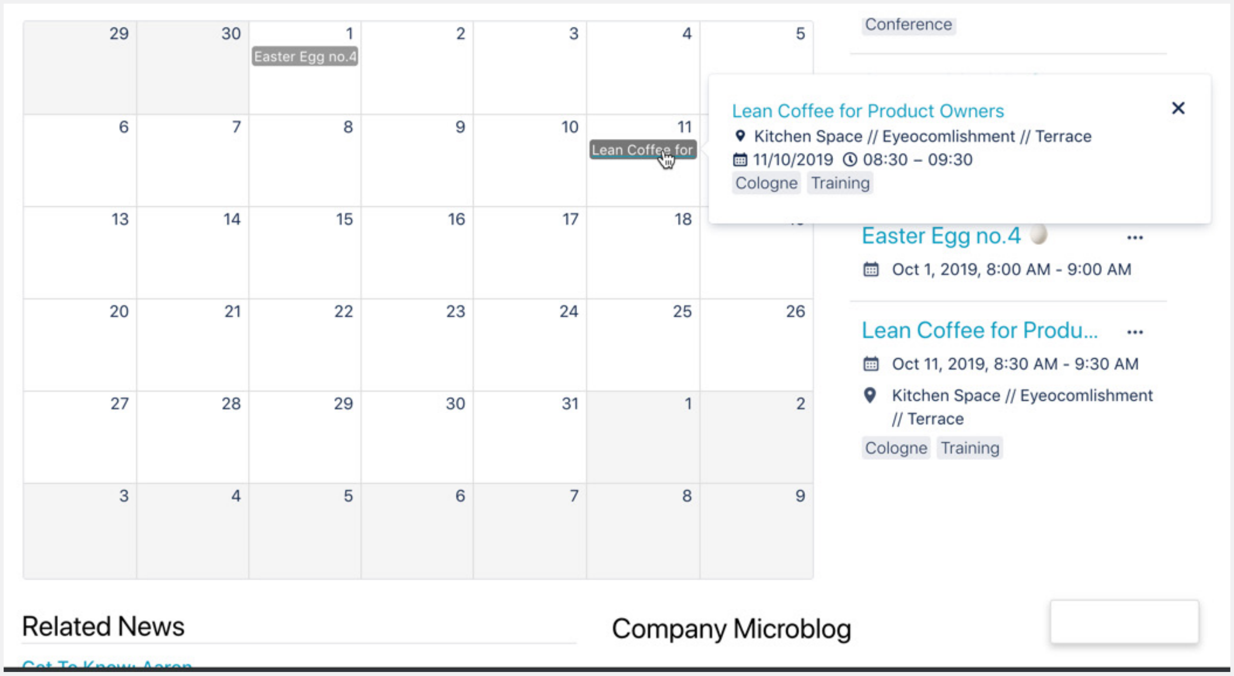



*Employees at First Solar could set their time zone location in their intranet profile.*

In the event detail view, it's also a nice touch to allow employees to see who's attending the event and to allow them to comment or ask questions beforehand. This information allows employees to see who else is going, which can encourage even more employees to attend. For example, Eyeo offered an event detail view in a modal-lightbox window and a small popup from the calendar view. Both detail views allowed employees to see the important event details, such as the event name, date, time, and location. Employees could sign up for the event and see who was attending.

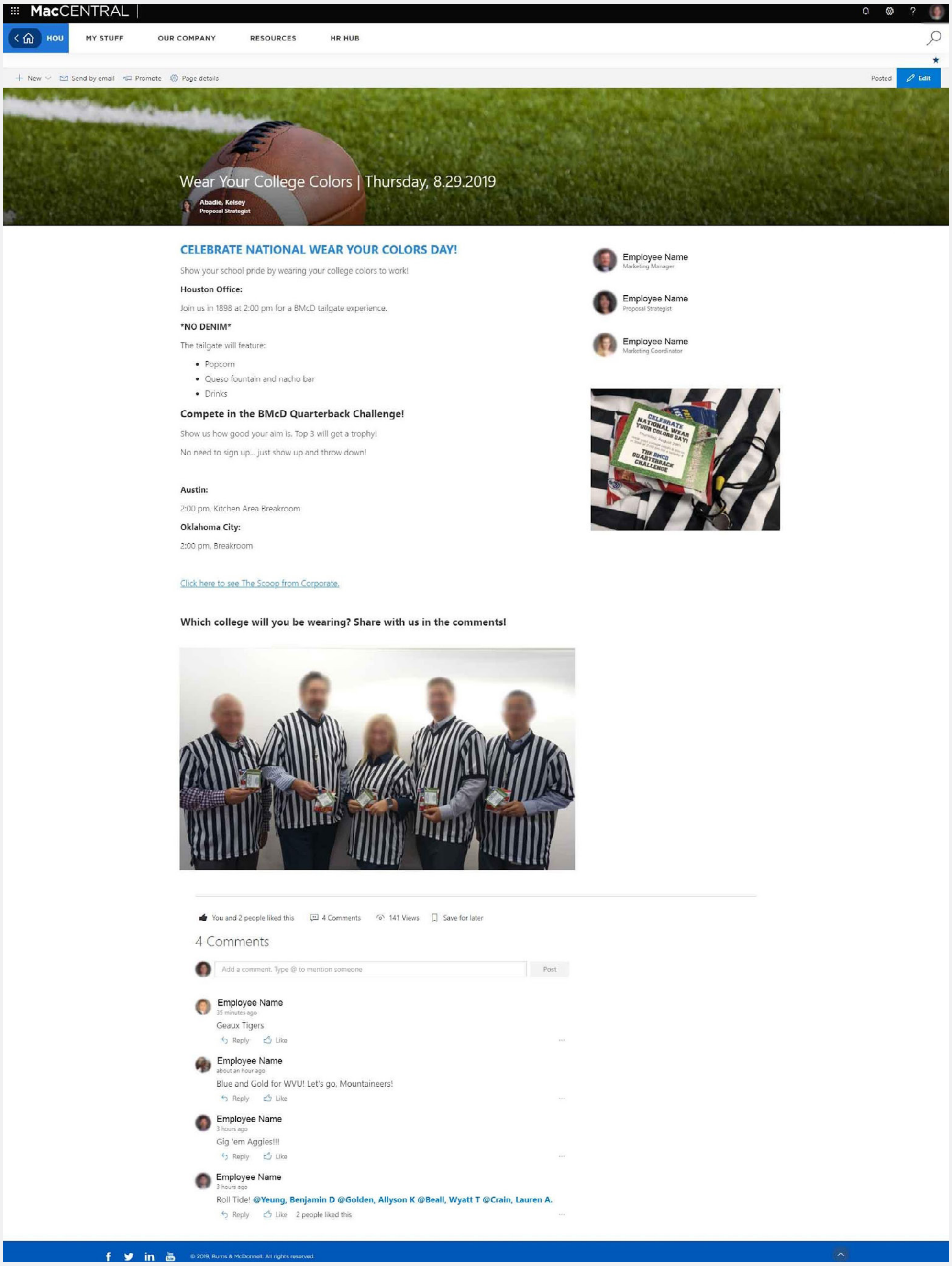



*The event detail view on Eyeo's intranet allowed employees to see an image associated with the event and the event details, such as the date, time, location, and participants. Users could sign up for the event from within this view if applicable.*




*Eyeo showed one month of events at a time on the intranet's calendar view. The detail popup shown here incorporated all the necessary details for each individual event, including the name, location, date, and time.*

Burns & McDonnell used longer detail pages, resembling news articles or announcements, to create awareness for some of its multi-office events. These event detail pages included what the event was and where it would take place across each office location. Also listed on this page were the event start time and the employees involved in planning it. Employees could comment on the event to show excitement, *Like* the event, and tag other employees in a post to drive awareness and interest, which was favorable.



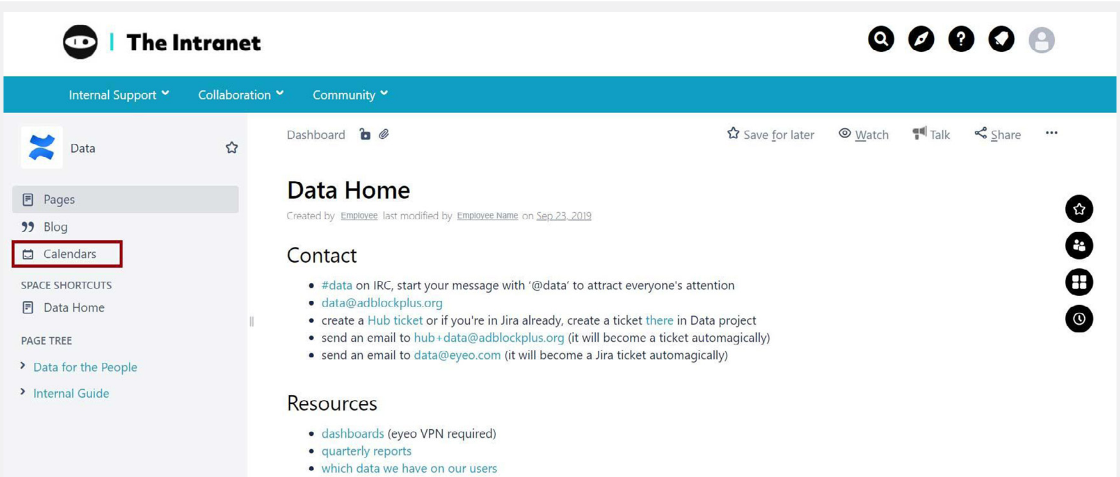

*Burns & McDonnell used longer event detail pages on its intranet and included liking, comments, and tagging capabilities to generate more awareness and engagement for the events.*

## 35. Clearly label team or department-specific events in their respective area(s) of the intranet.

Employees who were less familiar with events ran into issues when they tried to find a more specific event outside of what was listed in the all-company events section of the intranet. For example, Eyeo's intranet had a main landing page for *All events*, which was favorable, but each department and team also had its own event calendars that looked too much like the all-company events calendar. Because of this, users had difficulty deciphering company-wide events and announcements once they navigated deep into a department or team's page.

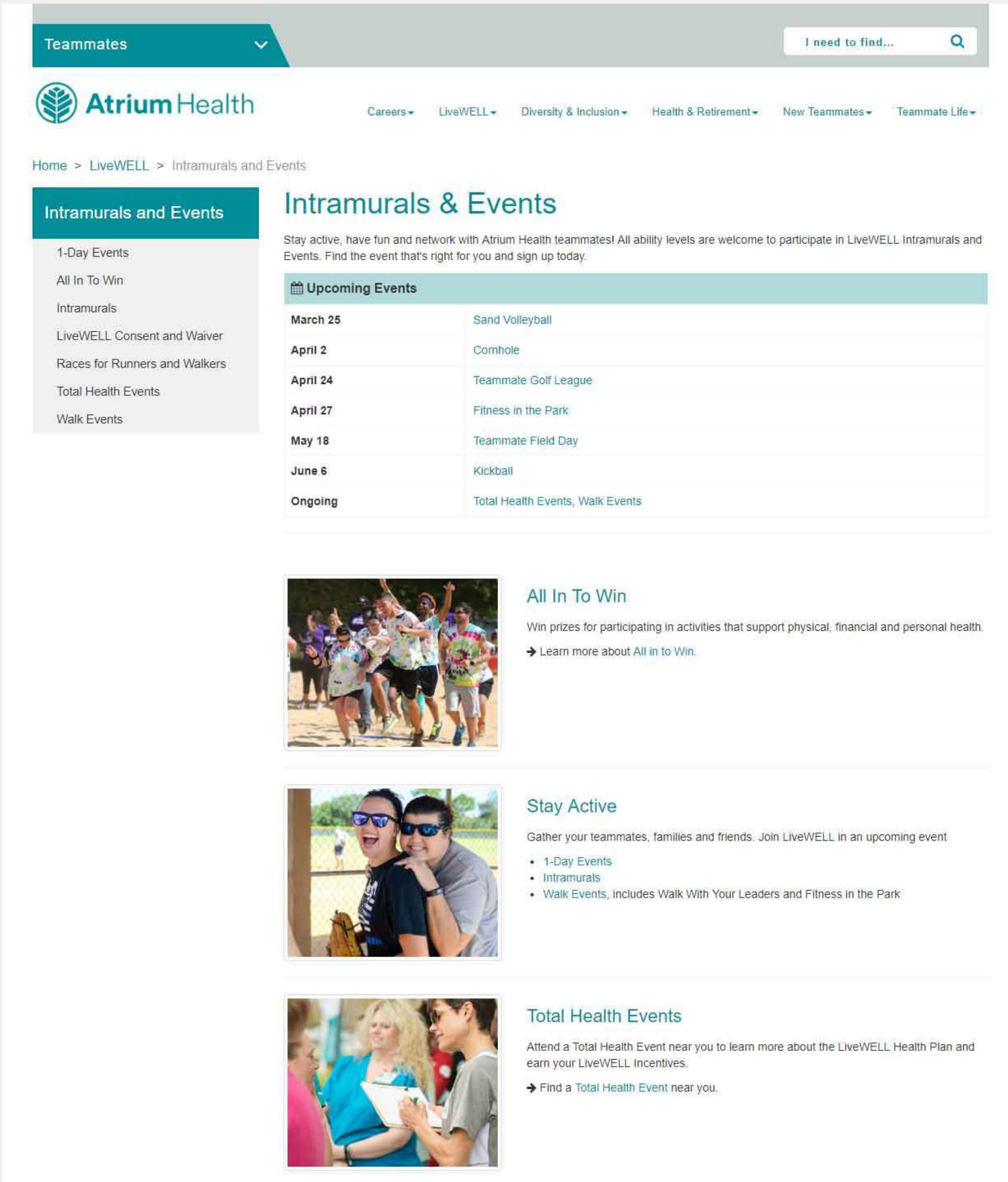
Calendars for each team were also represented in the same way in the left navigation across the intranet, which made it confusing and difficult to know if the calendars displayed events for the department, team, or entire company. One user said, "I thought that maybe there would be an event calendar there with all things happening at the office." Another user said, "I thought someone mentioned there was a calendar somewhere. I remember from a training that there were some sorts of calendars that could be found in a side menu where I could find some events."

In this case, a better approach would have been to label department and team-specific calendars more clearly, both in the left navigation and in the headlines appearing on the page. This would alleviate any question about whether the calendar was for organization-wide events or just those happening within a team or department. It's acceptable to have team and department-specific calendars. Just be sure to clearly label them in the contextually relevant areas of the intranet. Another user at Eyeo said, "I would like to have the opportunity to easily subscribe to a calendar and not have to look around. Maybe I don't know what exactly I need."




*On Eyeo's intranet, the* Calendars *link in the left navigation appeared similarly across the site, even within specific department and team sections. This made it difficult for employees to know whether the link would present team-specific events or company-wide events. A better approach would be to label this link as* Data Team Calendar *in the left navigation.*

In its *Intramurals and Events* section, Atrium Health used a calendar list to display upcoming events on the intranet. This contextual placement of specific events was favorable, and the clear labels on the page, in the left navigation and the headlines, made it easy to see that these events were specifically related to health, wellness, sports, and recreation for employees.




*Atrium Health displayed a variety of event types within the* Intramural & Events *section of its intranet. Clear labels in the navigation and headlines on the page made it easy to understand that these were recreational activities and events.*

# VIDEO

## 36. Use video for messages best suited for viewing rather than reading or scanning.

While studying users interacting with intranets and interviewing employees about their daily work routines, we realized that video was not a suitable or preferred content type for every message needed to reach employees. Video was well-suited for specific types of intranet communications, such as:

- Leadership messages or interviews (e.g., a message from the CEO)
- Charity campaign announcements (e.g., the United Way campaign)
- Detailed or complex project case studies (e.g., a multi-year acquisition deal)
- Quick trainings (e.g., how to use Slack)

**Employees reacted negatively to unexpected video.**

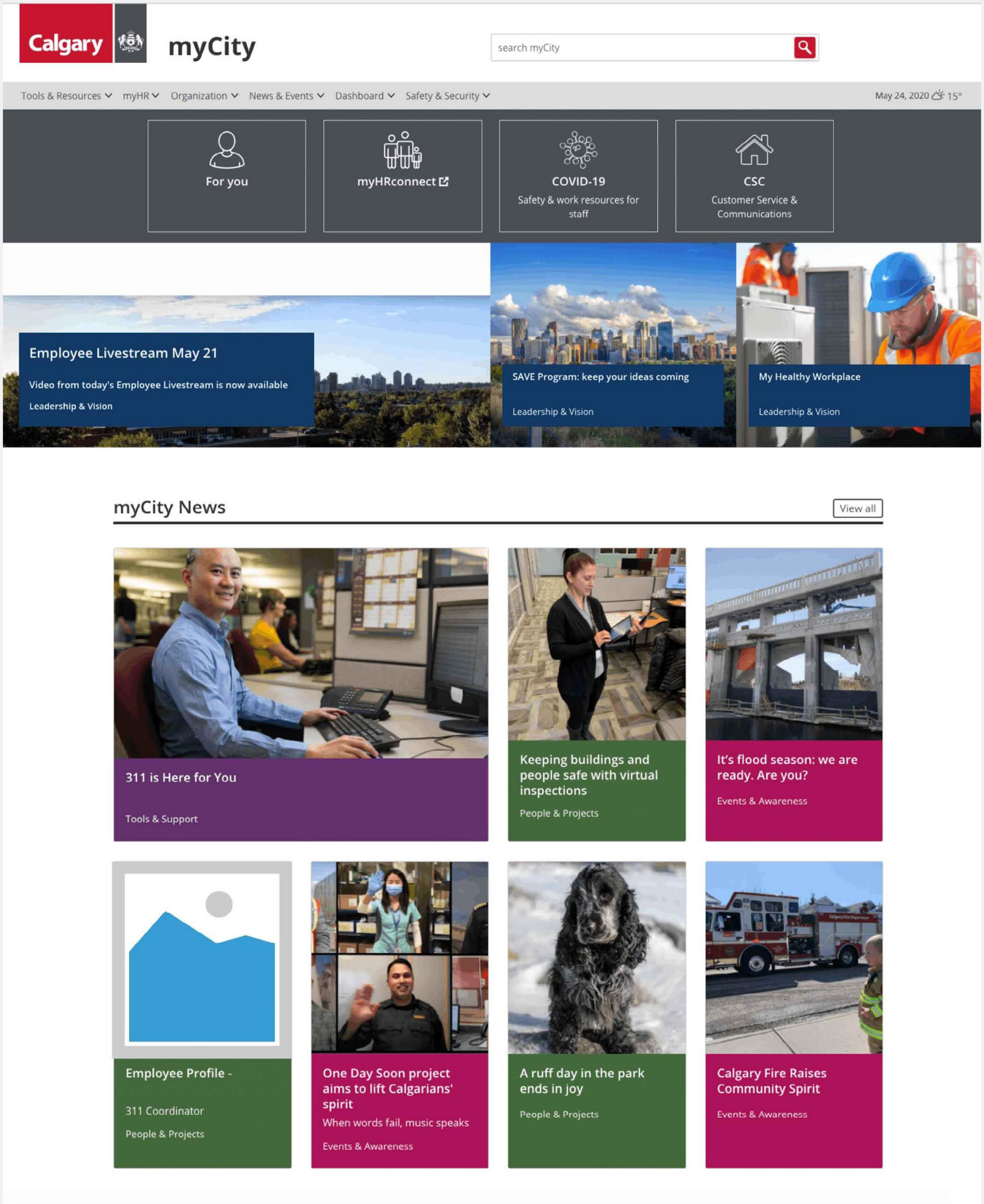
**User Behaviors**

Employees naturally gravitated to and freely interacted with videos about specific topics and, in doing so, stated the videos were of interest. However, if employees didn't know a piece of content was a video just from the headline and image used to promote the piece, employees reacted negatively to the videos.

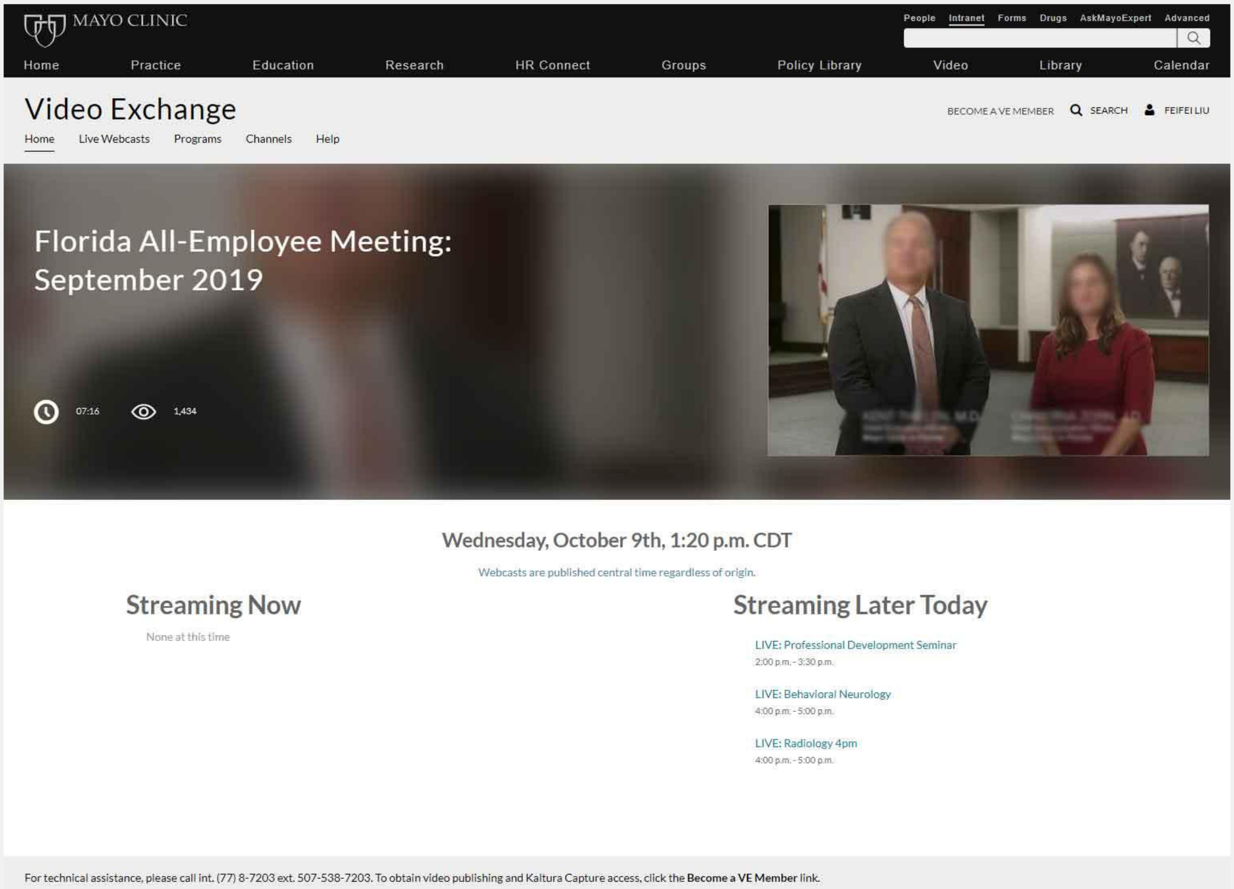
In many cases, participants selected a title expecting to read about the headlined topic but instead were presented with a video that did not interest them. One user said, "I don't know without reading if something is important to my job. I don't know without reading it."

A desire to skim and scan rather than watch a video was a recurring theme throughout our research.

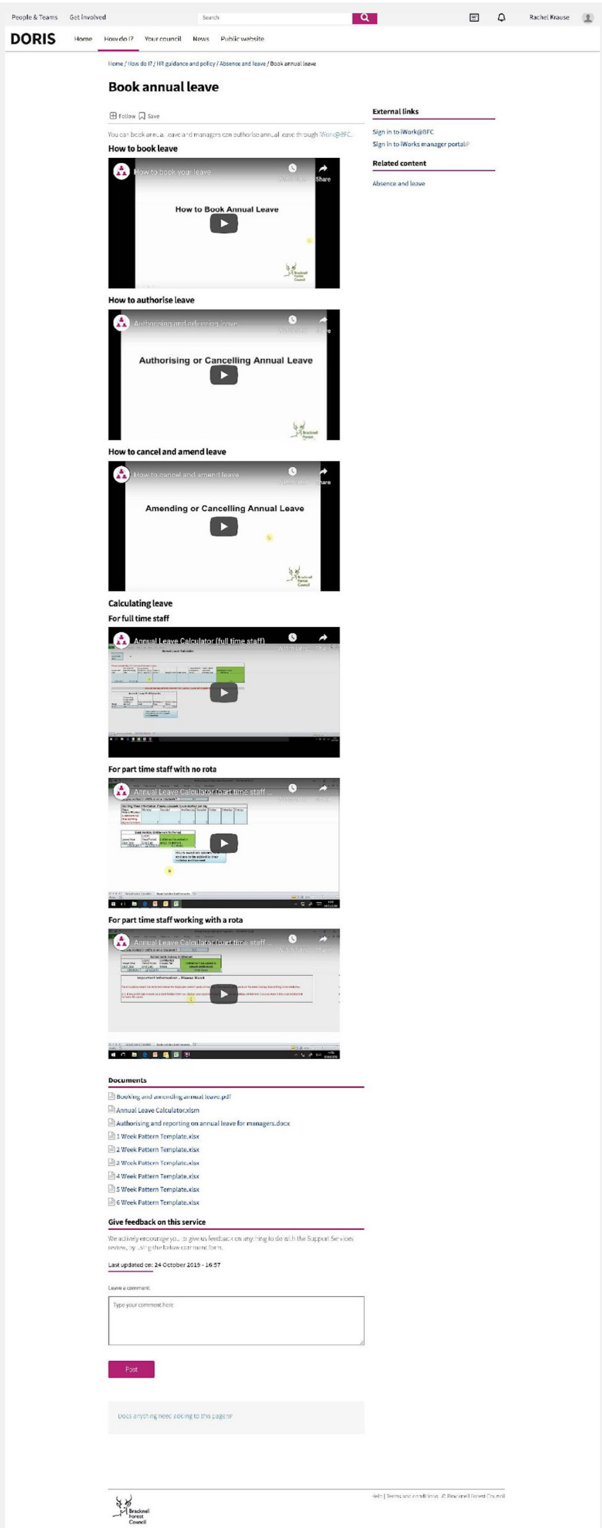
The City of Calgary added weekly video livestreams to its intranet, placing them in the *Leadership & Vision* section of the homepage. These livestreams gave employees a reliable way to watch leadership messages and a way to submit questions for leaders to answer in real time. A livestream recording, along with the questions and answers, was made available online for future reference, representing an effective and engaging example of how to use video on an intranet.



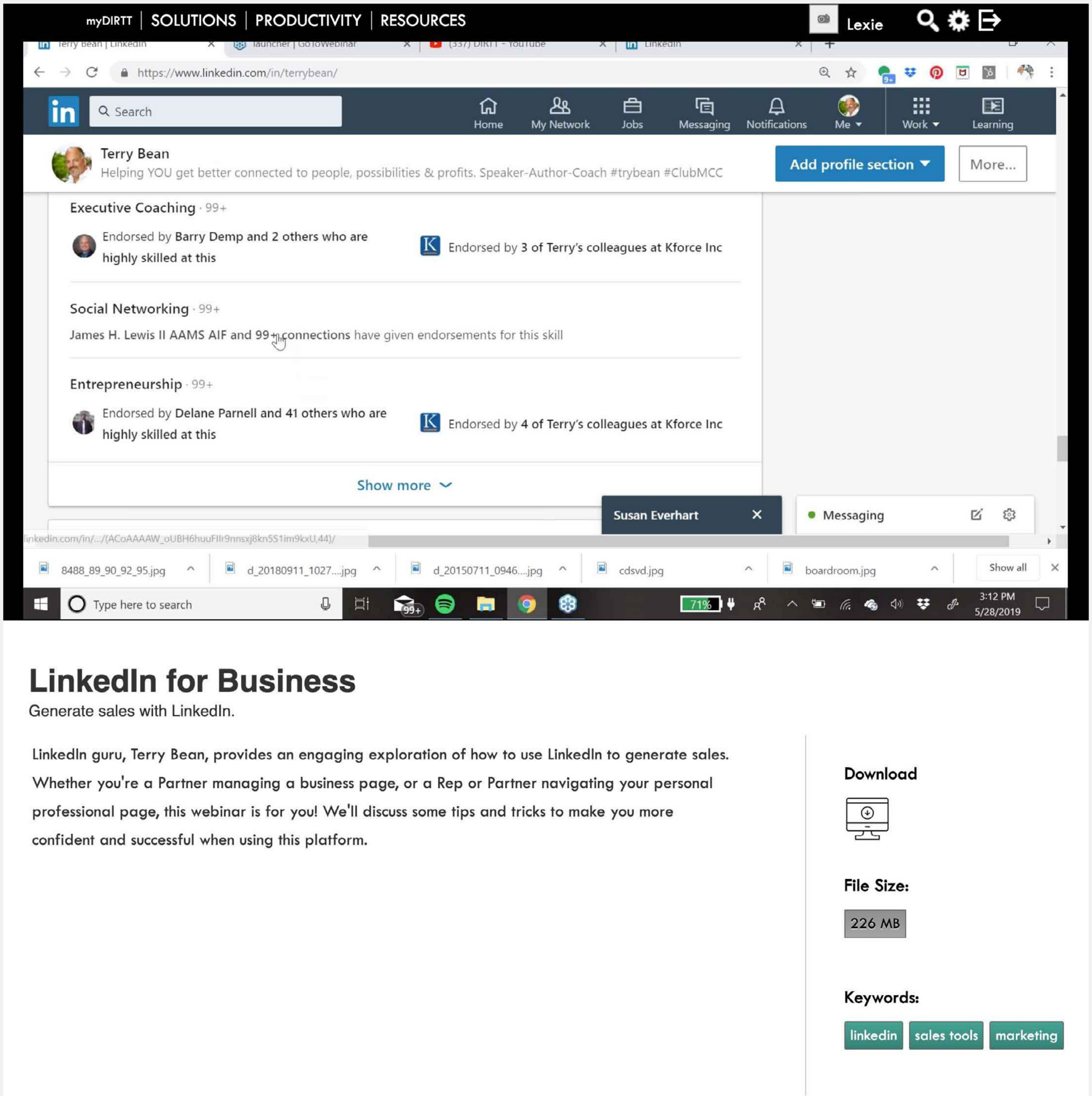

*The City of Calgary knew leadership videos resonated with employees, so it added livestream videos to the intranet. Employees could also submit questions for leaders to answer in real time during the livestream events.*




*The Mayo Clinic also used video to livestream its all-employee meeting, which is an effective use of the content type.*




*Bracknell Forest Council used videos to train employees on how to book annual leave. These videos were more effective than text at guiding employees through the process.*




*DIRTT also used training videos to teach employees how to effectively fill out their LinkedIn profiles to generate sales and leads.*

First Solar's intranet had a dedicated video section called PCTV; however, this branded term didn't resonate with employees (even though it contained the word *TV)*. Employees didn't immediately realize, from the name alone, that this section would have videos. As a result, there was low awareness about PCTV and mixed engagement with video content on the intranet overall.

Two of the employees we tested PCTV with didn't know how to find it because they didn't know it existed. Both people used the intranet's search engine to find it successfully. Unfortunately, the video platform was slow to load after they clicked on the search results. One user said, “I don’t think I’ve ever heard of this.”

A better approach would be to use a more descriptive name for the intranet’s video library so employees know what types of content it contains. Compressing videos to balance quality and length would also help speed up page load times for video content.

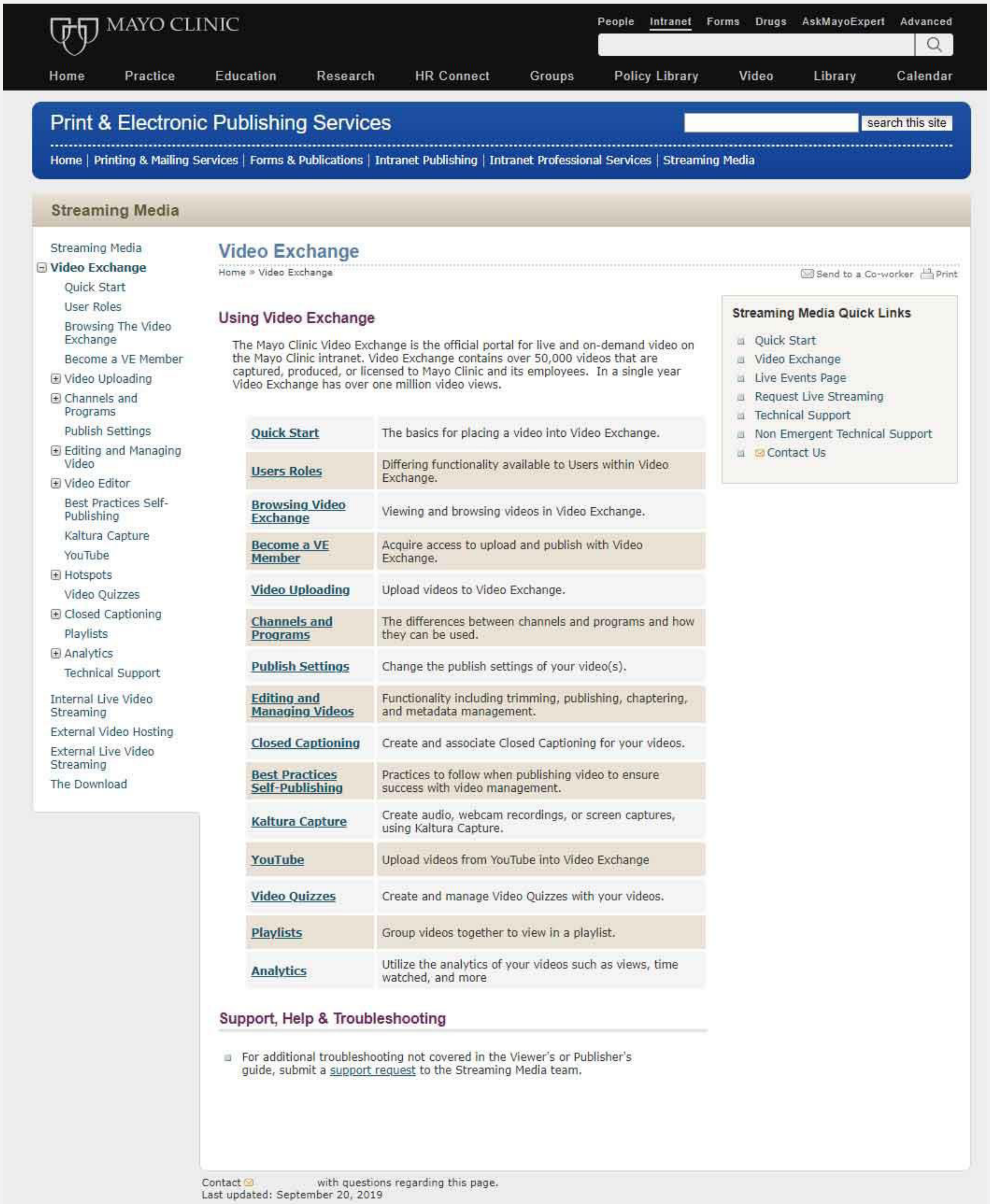
Another user we tested First Solar’s PCTV with seemed intrigued and watched a *Productivity and Collaboration* video in its entirety. They seemed to enjoy it and followed along with the entire video, saying, “Oh that’s cool.” However, the following user, who watched the same video, didn’t want to watch at all and said:

> “I wouldn’t go out and spend time watching videos, like I wouldn’t go out and spend time on Yammer. I get it if you have the time to sit here and do that, but normally in my mind, collaboration means touch points and meetings, not a video, but to each your own.”

We asked yet another user to watch a video of interest on PCTV. They also didn’t want to watch, and instead, they said:

> “I very rarely watch videos from the intranet. I might watch if I don’t catch recordings of our webcasts, our town halls, or when we do an earnings call, but there’s normally a recording of those as well. I’ll watch one of those on occasion, or I just grab it from FirstSolar.com”

The Mayo Clinic did a much better job defining the various video channels on its intranet. A dedicated landing page was used to describe each type of video and offered links to direct employees to where they could find the content. The only potential issue with this approach is that the organization used many different *types* of videos, making it difficult for employees to remember when they can or should watch a video about something versus reading about the topic in another part of the intranet. Because the intranet’s video content section was descriptively named *Video Exchange*, this let employees know right away that this is where they could come to find videos.




*The Mayo Clinic outlined the intranet's various video types using a single landing page with links to each video channel.*

At Dell, when we asked an employee to find and watch a video that interested them, they said, "No, I don't really care about videos. I watched this quarterly review because I'm really only interested in knowing the financial state of the company."

Similarly, at Atrium Health, engagement with intranet video content was low. When we asked an employee to find and watch a video that interested them, one employee said:

> "It gives me a video I can watch. I don't usually have time for a video. I very rarely [watch video]. I'm not a big video person on the internet. I prefer to read information, but if it is Teal Talks — when a leader talks about what they have done — I will watch those. I don't want to get out my headphones and wait for it to load."

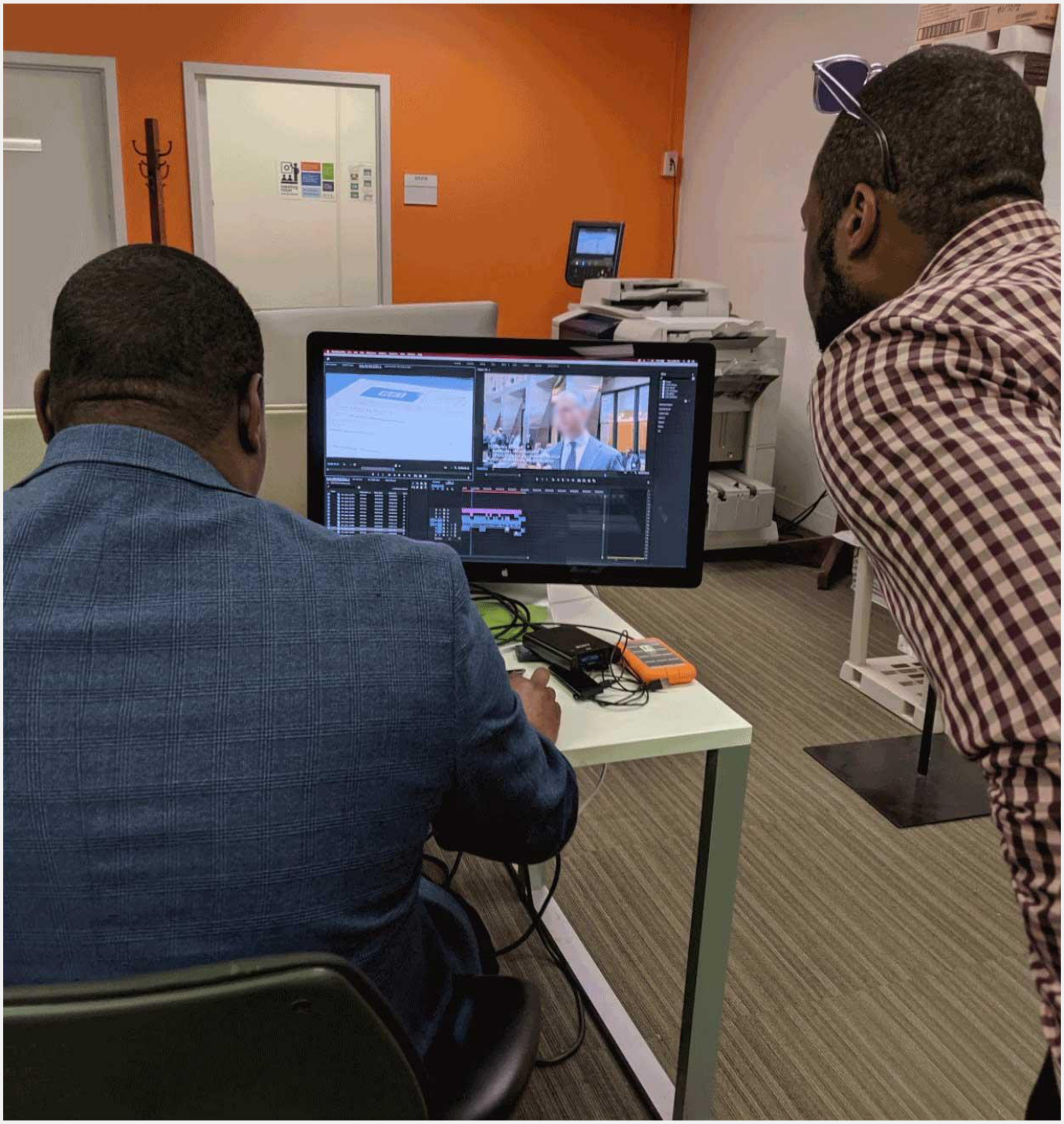
**Consider the time and effort required for video production relative to employee interest.**

Creating video takes much time and effort to plan, shoot, and produce. Many intranet teams described how doing video well was often much more labor-intensive than creating text-based content. Because of this, make sure to really dig in and understand the types of videos and topics your employees prefer to watch instead of reading. This way, your video strategy will be poised for success, with a high likelihood that employees will watch and learn from the videos you put in the effort to create.

One content manager said, "For me to shoot and edit a video, it takes a good five to eight hours. That's five-plus hours. I'm not doing other things, so I don't do as many videos as I used to because I can't get them all done well."

Consider the time and cost involved in creating video and whether another format, such as a page of written content, would better serve the message for users. When introducing video content, ensure analytics are in place to measure engagement and inform future production.

Use video only for instructional videos or formats where text is not engaging enough. Options such as shooting on modern mobile devices and livestreams can also be favorable approaches to help reduce the time required to produce quality video.



*Two intranet content managers at the GSA described how video often takes much more time to shoot and edit in post-production than written content types. If teams don't undertake proper planning so they are delivering messages employees expect in a video format, then that time is wasted if people would prefer to read instead of watch.*

## 37. Display a meaningful title, short description, and indicator for each video anywhere they appear.

Just as with news articles and announcements, it's also important to include a clear title and short description alongside each video on the intranet, anywhere they appear. Doing so will ensure employees can get an idea of what the video is about and help them decide if they want to click to watch all or part of the video. Employees may also have to expend effort to find or put on headphones before clicking, so well-defined video headlines and descriptions may further motivate employees to do this.

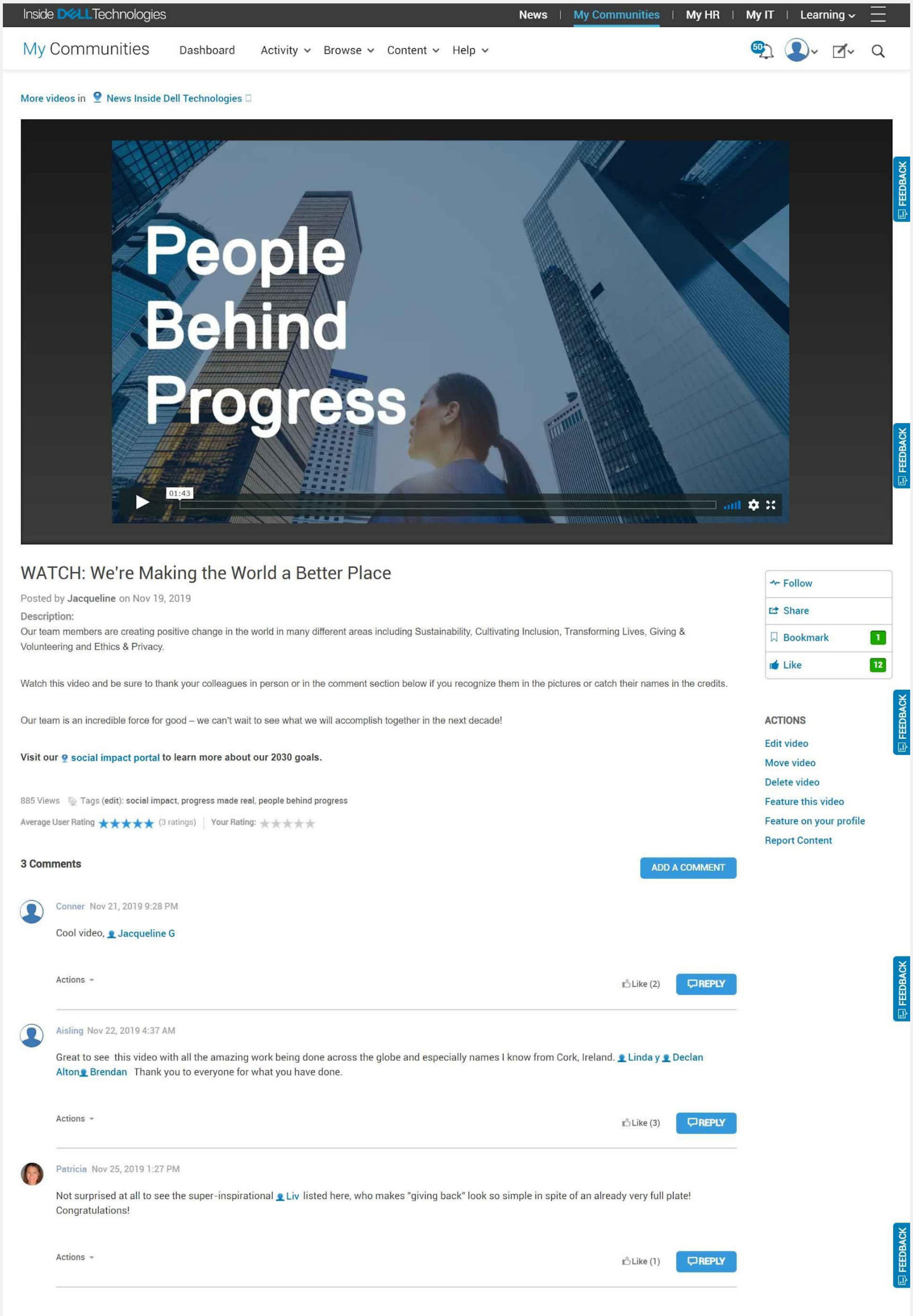
The best intranets we studied also included visual indicators to signal to employees that a piece of content was a video rather than an article or written piece of text. Some used a *Play* icon overlaid on an image, while others used a text label near the headline or description for *Video* or *Watch*. These were helpful details to include as they reinforced and set expectations for the content's format. Users could distinguish video content from news articles, blog posts, and other content types *before* clicking if they wanted to further engage with the video.

Dell used a prominent *WATCH* label next to the video's main headline anywhere it appeared on the Internet, including on the video detail page. This helped set users' expectations that they would be watching a video instead of reading an article or engaging with other written content. It was also a very accessible approach, as relying on an icon alone without a label is not accessible. In addition to the *WATCH* label, a clear headline and simple summary accompanied the video anywhere it appeared on the intranet. The on-page content read:

> WATCH: We're Making the World a Better Place
>
> Our team members are creating positive change in the world in many different areas including sustainability, cultivating inclusion, transforming lives, giving and volunteering and ethics and privacy.
>
> Watch this video and be sure to thank your colleagues in person or in the comment section below if you recognize them in the pictures or catch their names in the credits. Our team is an incredible force for good — we can't wait to see what we will accomplish together in the next decade.

Employees could also rate and comment on the video, which was favorable. Tagging employees directly in the comments to recognize them for their contributions to the video also helped to drive further engagement and interest in this type of content.

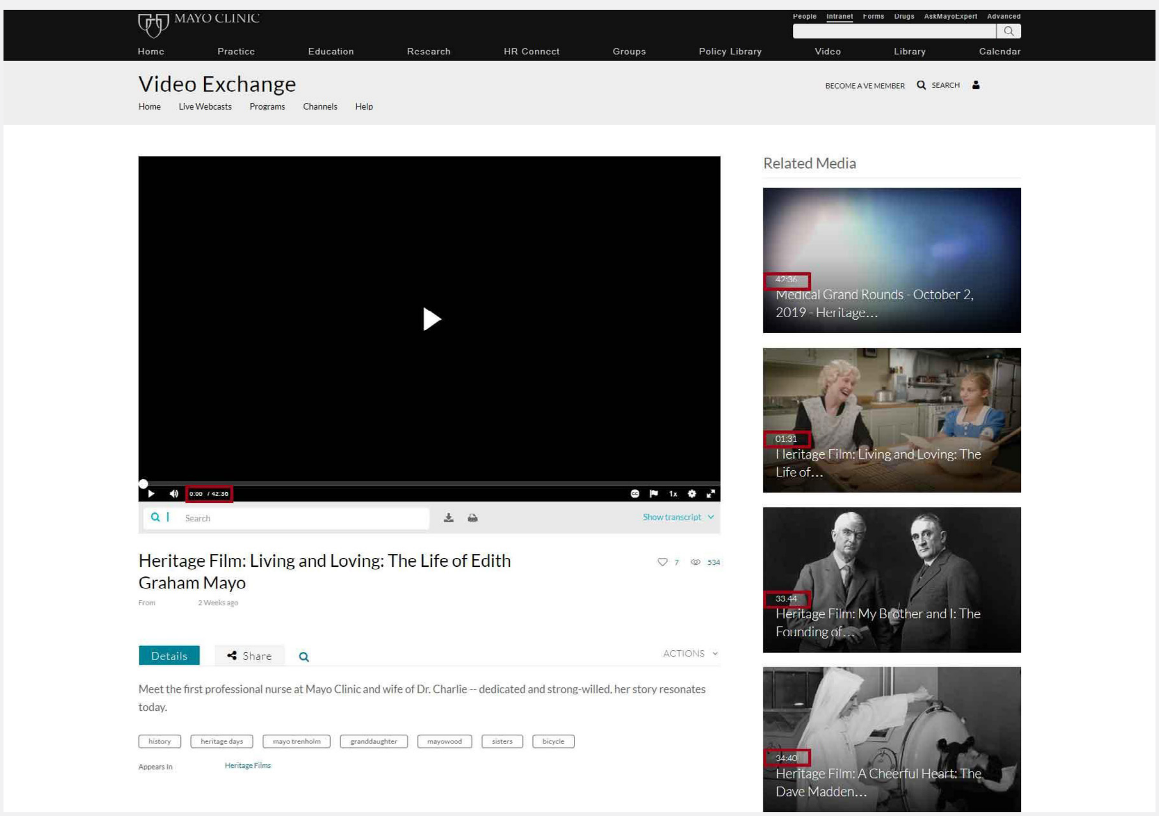



*Dell included a clear title as the video's headline, along with a short description.*

## 38. Show the video's length upfront to help employees decide whether to watch the full video or only part of it.

Employees are often busy, so seeing the video's length alongside its headline, description, and placeholder image can help them decide if they want to take the time to watch the full video, only part of it, or if they should seek another way to consume the content. It's best to keep videos on the intranet short and to the point, usually two minutes or less, unless the video's topic necessitates a longer duration, such as a company meeting, an interview with an executive, or a training video.

Most intranet video players display the video's length once the employee starts watching the content; however, a more user-friendly approach is to show the video's length *before* the employee begins watching it. For example, at the Mayo Clinic, the video player displayed the length of each video clearly so employees would see it before they clicked the *Play* button. Seeing this timestamp helped employees decide if they wanted to watch the entire video or just the first few parts. One user at the Mayo Clinic commented, "It's nice when you can see how long a video is going to be so you can decide if you don't have time to watch a whole video."




*The Mayo Clinic displayed the length of each video on its intranet in the video player and on the cards that promoted video content. This was favorable as employees did not have to start watching the video to learn how long it was.*

**Allow employees to control when the video starts and stops; don't automatically play.**

Timeless Design Tips

When videos play automatically, many users' first instinct is to mute or pause the video. Users should easily be able to start, stop, restart, mute, or adjust the volume of any video or audio content on the site.

Auto-playing video is extraordinarily distracting and off-putting for users, especially those in a busy office environment, who may risk interrupting their colleagues and those around them with a loud, abrupt video.

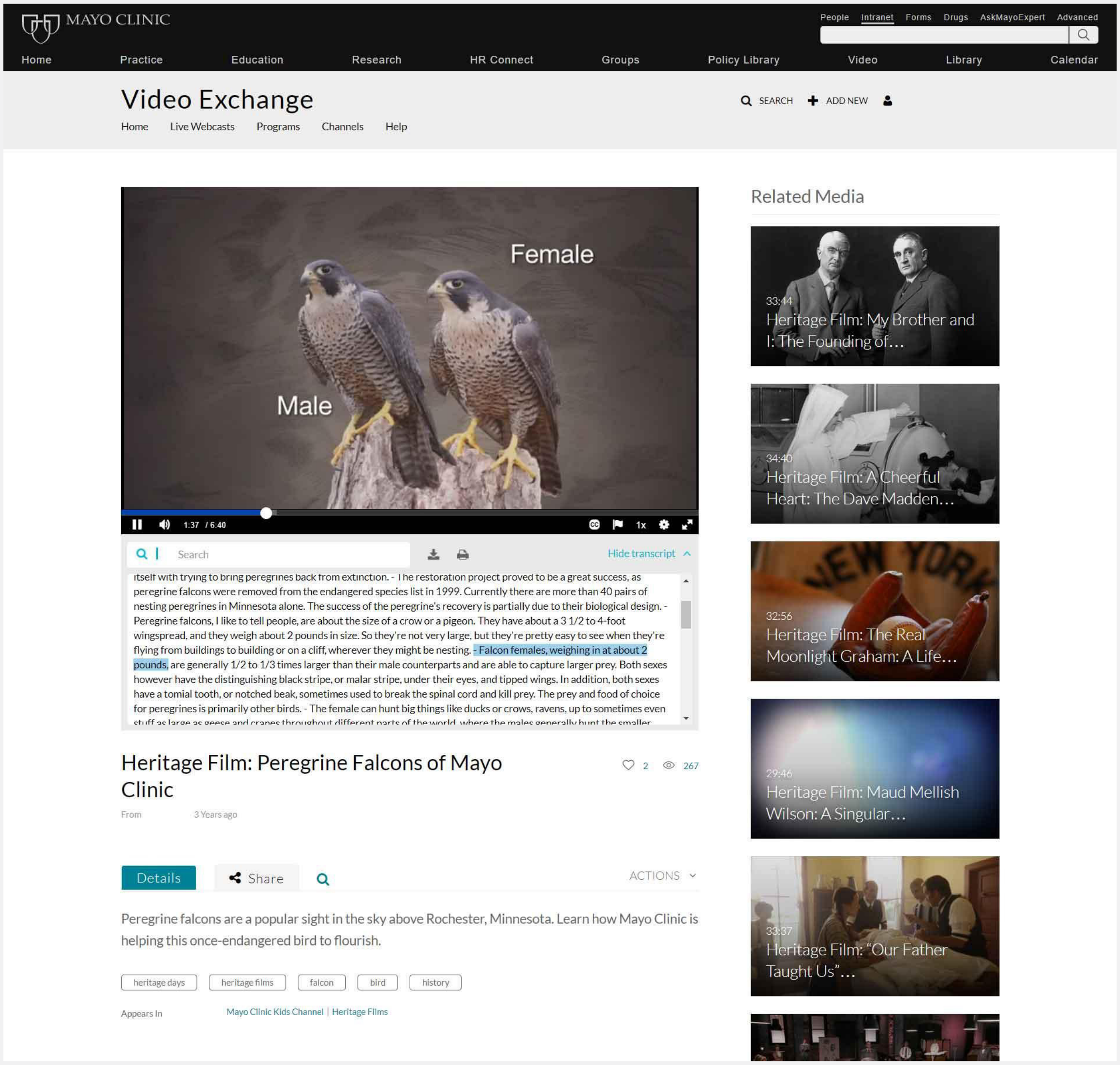
Always allow employees to remain in control of when videos stop and start. Simply clicking on a play button to begin the video and clicking again to pause it is the best practice approach. Never begin video on page-load.

## 39. Include text-based transcripts for all videos.

Display transcripts alongside videos for users who prefer to read content rather than watch and listen to it. Transcripts are especially helpful in situations where users may not want to disturb their coworkers, when they don't want to pull out their headphones, or more often, when they can't find their headphones. Additionally, it's an accessible practice to include transcripts for videos to support employees who may rely on assistive technologies to read the transcript rather than watch the video. One user at Burns & McDonnell said:

> "I usually don't watch videos; I have more things to do with my time at work than watching videos. I get frustrated getting information. I use the transcript and move on. I'm typically working about as hard as I can, so I'm not looking to just sit and watch videos on the intranet."

The Mayo Clinic did a nice job of including transcripts near its video content. One user turned on a video's transcript and commented about how she liked the feature because she could scan the text to get a sense of the video and see if there were sections she would like to fast-forward to. After highlighting and skimming the transcript alongside one video, she said, "These heritage films are always interesting to watch."




*The Mayo Clinic displayed video transcripts in an accordion underneath the main video player on its intranet. Users could easily expand the transcript to follow along with the video and then collapse it after finishing. This is an optimal approach, as it makes the transcript available but doesn't take up excessive screen space to display large amounts of text.*

Users we studied at Dell had little desire to engage with intranet video content. We asked them to read or watch something that interested them, and only one user chose to watch a video, and that was only because it featured an actor they liked. Later, they explained that they weren't interested in videos and usually looked for and relied on the transcript instead:

"I like to read things sometimes, instead of watching videos. I can grasp the information more by reading it versus watching it. I get distracted by other things happening in the videos. I'd like the option to get a transcript so I can just read it."

## DEPARTMENT AND TEAM LANDING PAGES

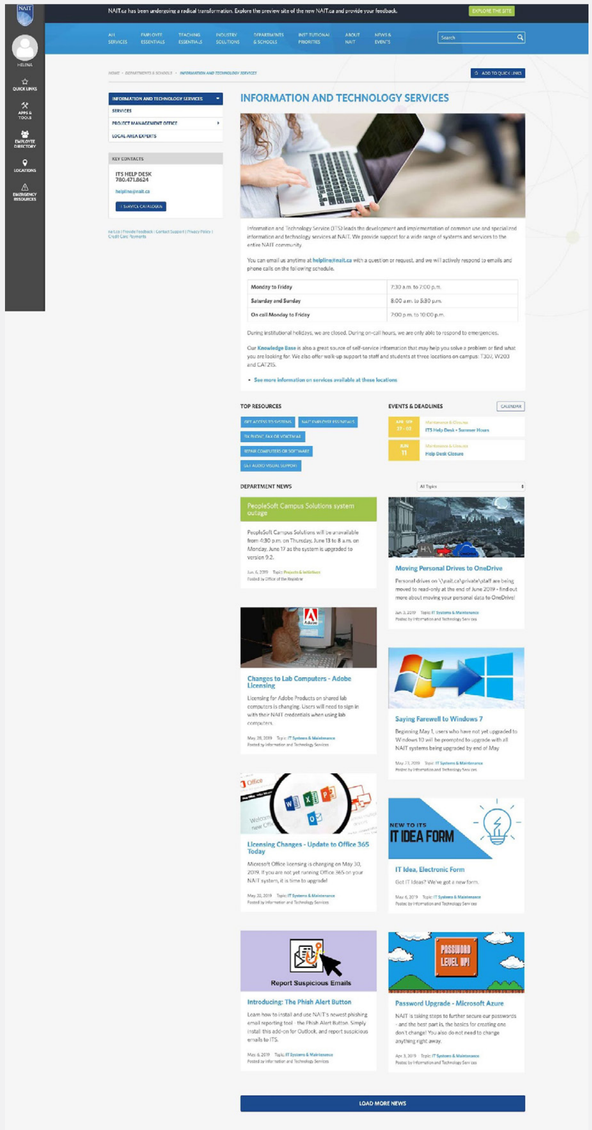
### 40. Offer a descriptive overview along with links to deeper pages and resources on key landing pages.

Key landing pages for major categories and subcategories on the intranet are extremely important but are rarely done well. Landing pages often have too much irrelevant or obscure content that doesn't align with employees' top tasks for the space, or the content is so shallow that the pages fail to route users to the appropriate subcategory they are looking for.

These transitional pages need to help employees understand what the section is about, what content exists within it, and also help them navigate to more specific, task-based subsections within the category. For example, on the Northern Alberta Institute of Technology's intranet, metadata and topic tags were used to pull contextually relevant news and events content into department-specific landing pages, which was a fixture on all such pages.

The *Information and Technology Services* landing page representing the IT department was an optimal example of an intranet landing page. A clear description of what the department does appeared at the top of the page, just below a meaningful image used to reinforce the department's key role, which was to support employees' hardware and software needs.

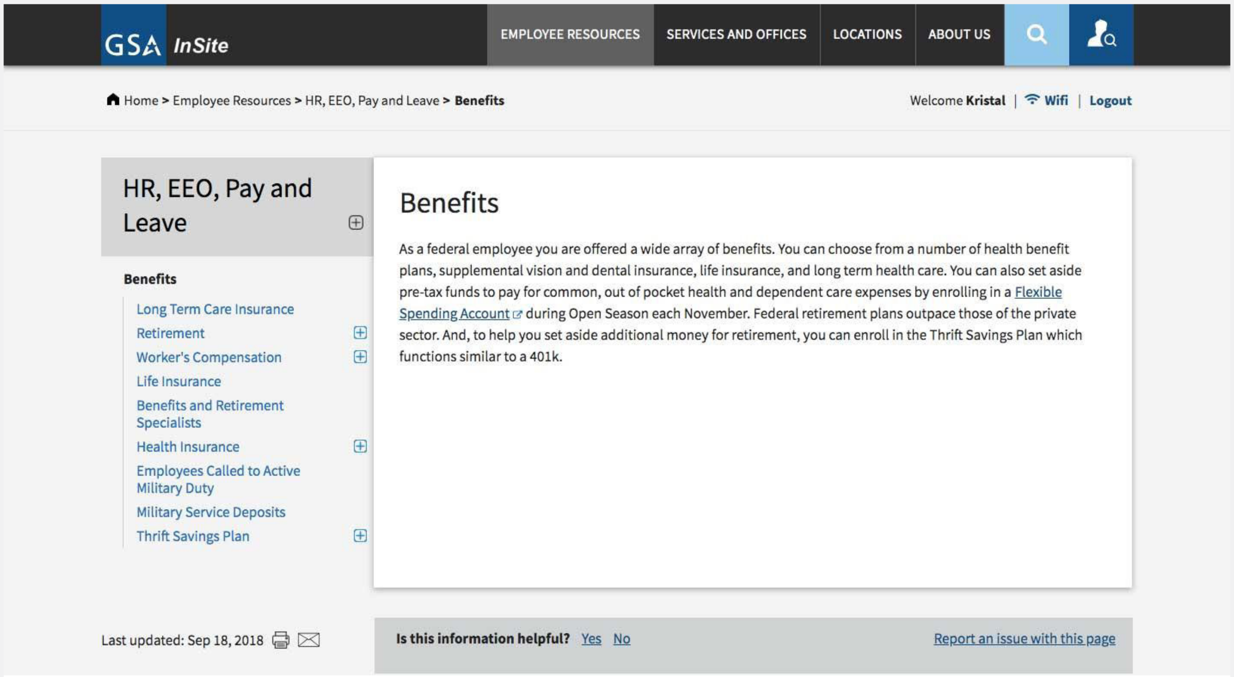
The department's contact information and hours of operation were also listed high up on the page since employees often came to this space to find that information, and links to the department's knowledge base and task-based resources also appeared. From this landing page, employees could explore more services and contact local area experts to get help with their computers, phones, printers, and more.




*The* Information and Technology Services *landing page on the Northern Alberta Institute of Technology's intranet represented a good example of an intranet landing page. It prioritized the correct details and length of the text, and specifically contained content related to the needs and tasks employees have for the department, such as finding hours and self-serve resources.*

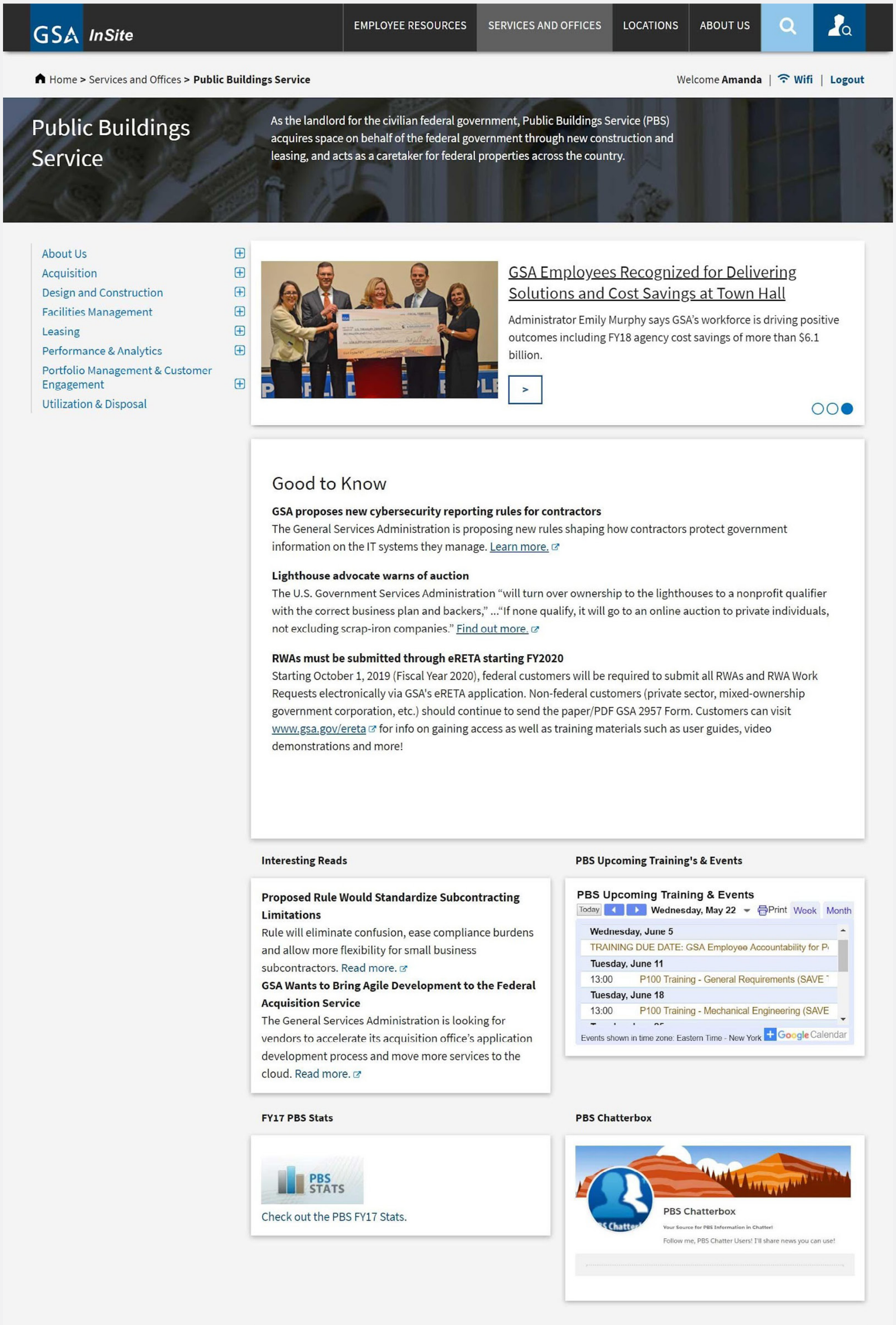
At the General Services Administration, key information was missing from intranet landing pages where employees would expect to find it. In one task, we asked users to find out how much of a transit pass is subsidized, and because there was very little valuable content on the *Benefits* landing page, users struggled to complete this task successfully.

Conduct regular user testing with your employees at various offices to ensure their questions are being addressed on key landing pages rather than what content creators assume should be there.




*The General Services Administration failed to provide an adequate overview, answers to key questions, and clear paths to important subcategories on its intranet's* Benefits *landing page. Considering this is such a critical page for many employees, it's unfortunate that users had to rely on left navigation links that appeared out of context to try and find what they needed.*

We observed a much better example of a good landing page on the GSA's intranet, on its *Public Buildings Service* page. A brief overview of the department appeared at the top, along with three recent news articles and announcements in a carousel. The body of the page included the most important announcements, labeled *Good to Know*. Employees could also find *Interesting Reads*, a section for upcoming training and events, statistics, and a social channel for the department. The links in the left navigation used clear language to set users' expectations for what they would specifically find there after clicking into a deeper subcategory.




*The* Public Buildings Service *page on the GSA's intranet represented a much better example of a key landing page than its Benefits landing page (shown above).*

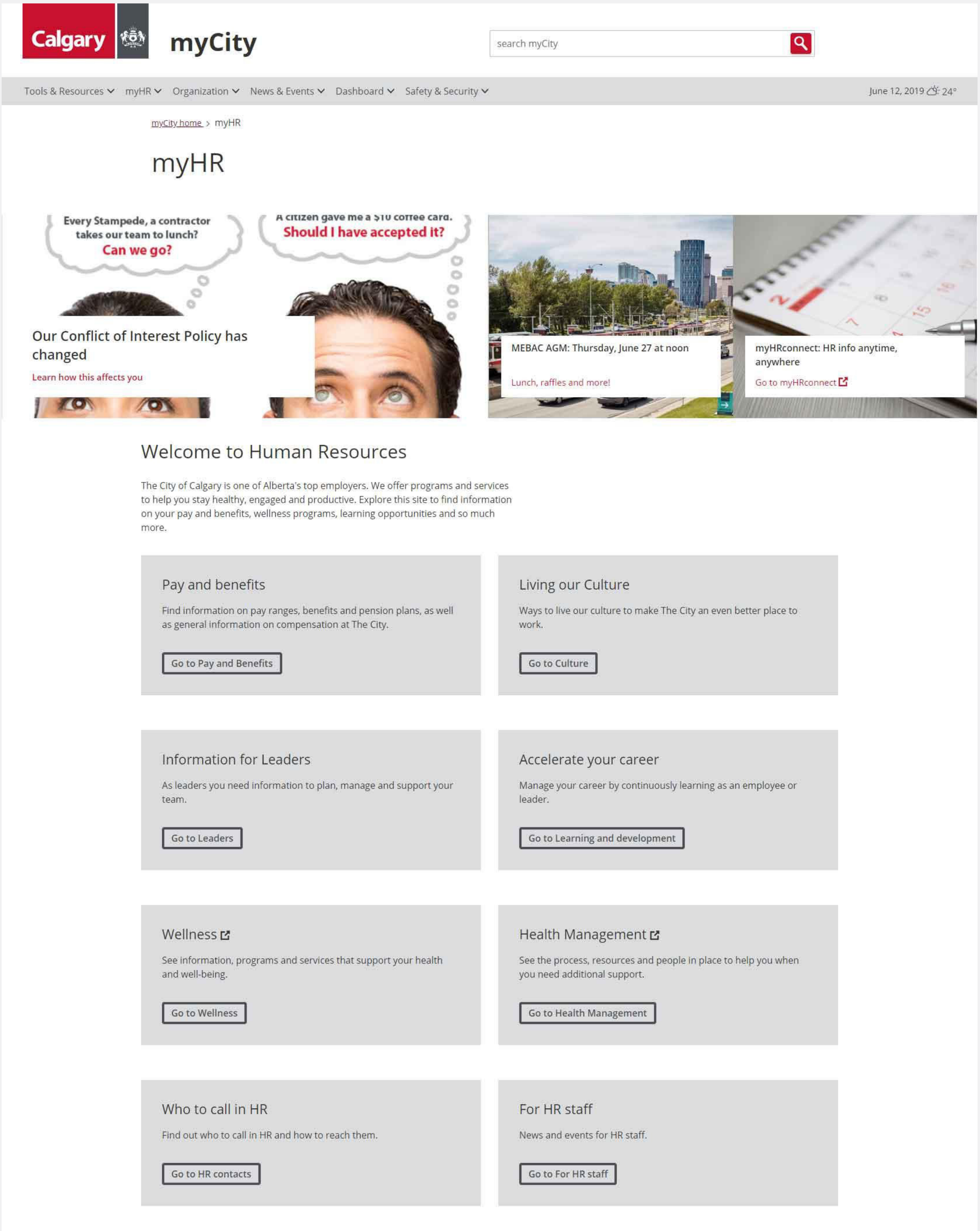
The City of Calgary's human resources page, *myHR*, also represented a great example of an intranet landing page. The page prominently featured updates and announcements related to human resources and benefits that employees needed to know about. Lower on the page, employees could find a simple description of the department and information about what they would find in the space:

> Welcome to Human Resources
>
> The City of Calgary is one of Alberta's top employers. We offer programs and services to help you stay healthy, engaged, and productive. Explore this site to find information on your pay and benefits, wellness programs, learning opportunities, and so much more.

Underneath the introductory message, employees could easily access the important subcategories in the *myHR* space. Clear headlines and short descriptions helped provide context for each section so that employees knew exactly where to find information or complete specific HR-related tasks. The helpful, direct links that appeared in this space included:

- *Pay and benefits*
- *Living our Culture* (culture-focused content)
- *Information for Leaders*
- *Accelerate your career*
- *Wellness*
- *Health management*
- *Who to call in HR*: A list of who to call and contact information for specific tasks
- *For HR Staff:* News and events for staff working in the HR department

When events were planned, a calendar also displayed at the bottom of the page.




*The* myHR *page on the City of Calgary's intranet represented a good example of a key landing page. It included content employees needed to know, including a short description of the department and sections to help employees complete HR-related tasks.*

# BLOGS, SOCIAL TOOLS, AND INTEREST GROUPS

## 41. Incorporate blogs on the intranet as a way for employees and leaders to share their perspectives and interests.

### Define a Purpose and Provide Guidelines

Adding blogs to the mix of content offerings on an intranet can serve a few beneficial purposes. They enable employees to directly share content about their roles, team, projects, and personal interests, even on intranets that follow a centralized content-management model (where most of the content is otherwise created and posted by an internal team). They are also an important tool for leadership team members to help them engage with employees by posting updates and sharing their perspectives on a wide range of topics.

**Define a purpose and a blogging strategy before adding blogs to the intranet.**

Process and Strategic Considerations

Blogs and blogging must be driven by a strategy and a clear reason for their existence, otherwise blog posts risk getting lost, ignored, or confused with other more prominent and purposeful content types on the intranet, such as news articles, announcements, and work-related resources.

# Writing blog posts

While we have professional writers in the company, we also encourage anyone with interest and expertise to write for our blog. We want to have opinions and ideas from the people who are best qualified to write, and our writers are here to help with editing and grammar correction as needed.

## The Basics

We try to write four pieces of content per month on the eyeo blog. Content should follow our goals of a) positioning eyeo as an employer brand and b) positioning eyeo as a thought leader in the industry.

## Guidelines

If you write for the blog, please follow the **Voice and tone** section, as well as the rules laid out in the **Grammar and style** section. There are also some general points that you can follow here:

- **Be natural, but smart**
  We want to be engaging and interesting to people, so there is no need to write in a super formal way. You can educate while remaining conversational.

- **The point, please**
  Do not, as they say in the industry, bury the lede. Our blog posts should be easy to digest, so let's make them that way. Use short paragraphs and use subheads. People don't have time to read, so let's make sure they read our stuff.

- **Use links**
  Link away from eyeo.com if there is a particular site that helps the reader understand something.

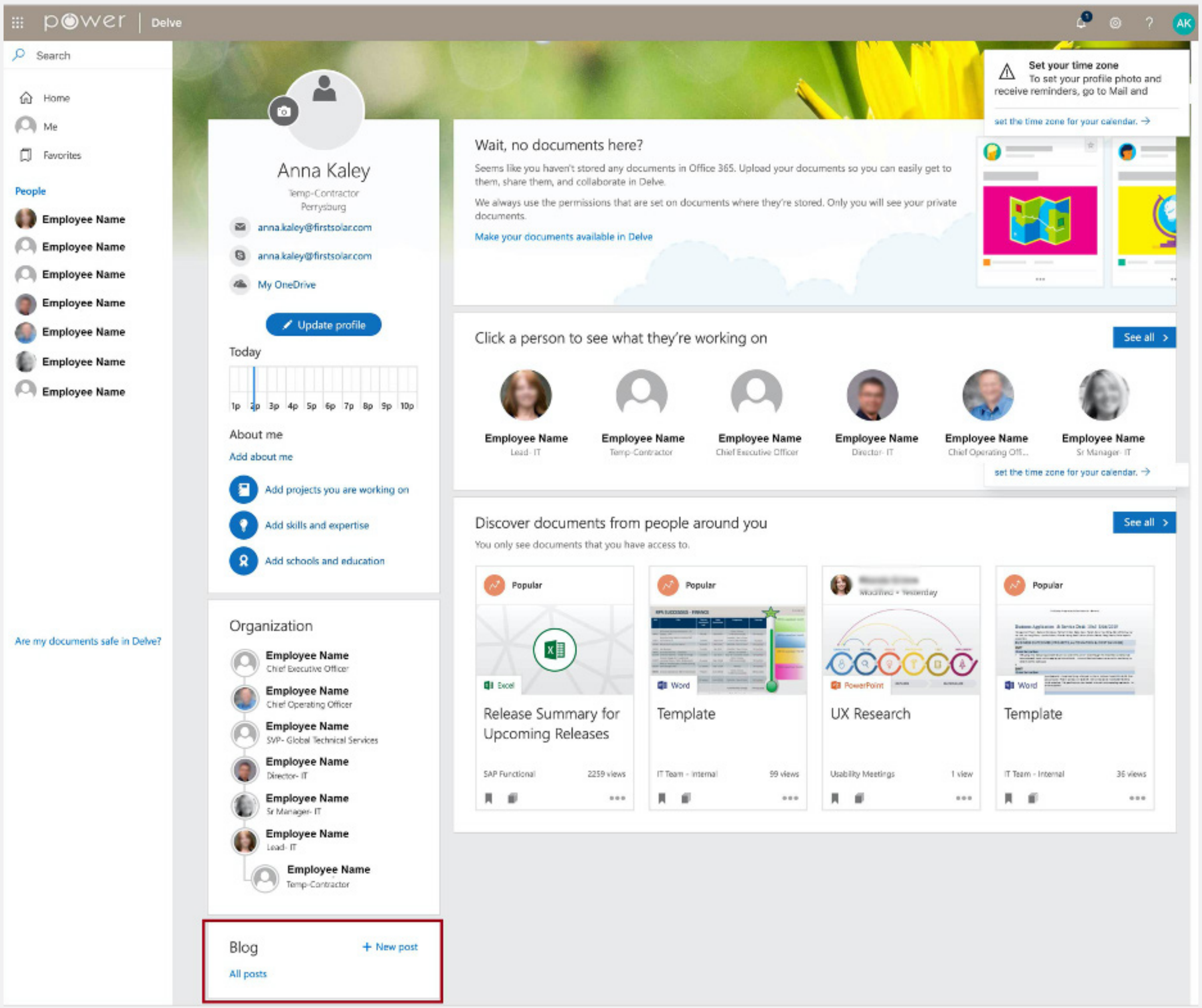
- **Use tags and keywords**
  As we use Wordpress for the blog, you can add relevant tags and keywords to the post. Keep the tags and keywords on topic.

- **Use images**
  Use pictures and screenshots in your blog post to break up the text and highlight your point. Make sure to use alt text.

*Eyeo's content style guide included specific guidelines and helpful tips for blogging. This was an excellent example of defining a purpose and strategy for intranet blogs.*

## The Lifecycle of Employee Blogs

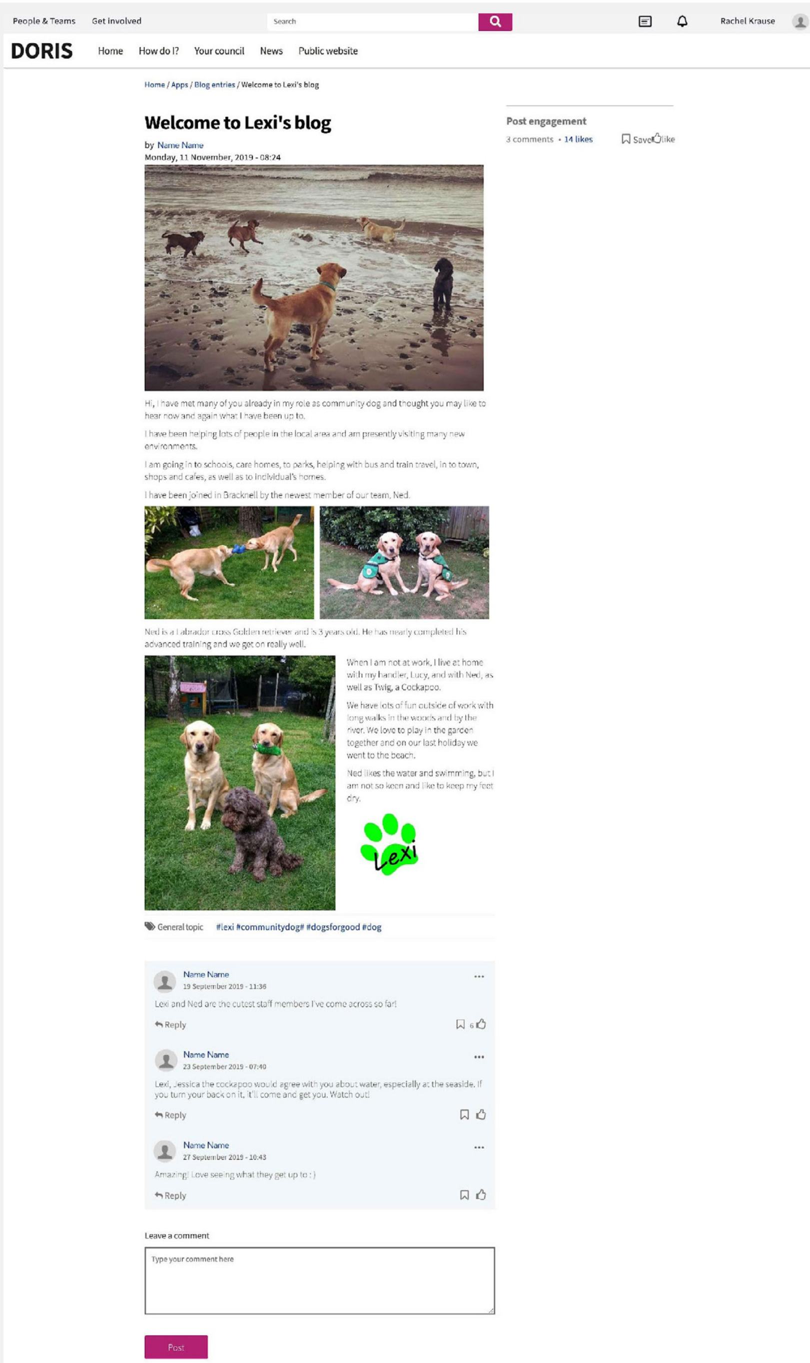
At First Solar, employees were given a blog as part of their Delve profile; they could freely post about any topic that was work appropriate. These posts appeared on their employee profile and in other contextually relevant areas, such as the main blogs page and their team and department landing pages. Employees were encouraged to write in the first person in their blog posts.




*First Solar employees could create a blog post from within their Delve profile on the intranet.*

Bracknell Forest Council employees were encouraged to blog about personal interests and topics that would provide an element of fun and lightheartedness to the intranet. Lexi, the community dog, even had her own blog, which won the hearts and attention of many of the employees at the organization. One intranet team member said:

"We want to get more of Lexi's blogs posts that are written from a dog's point of view. These blog posts appear in our blogs feed, not the news feed, so this helps to differentiate them. However, some blog posts are also emailed out alongside other news, so there is some crossover and confusion sometimes with the content types and purpose."




*One of the more popular blog posts on Bracknell Forest Council's intranet was written from the perspective of its community dog, Lexi.*

Any employee at Bracknell Forest Council could create blog posts, but first, they needed to have blogger permissions enabled within their user profile. Employees could contact the central intranet team at any time to get these enabled. The intranet also included content pages to help employees understand how to blog and what standards to follow if they wanted to be a blogger. Another intranet team member said:

> "We have this process in place so that we can give guidelines and know who's blogging. We had an issue in the past with someone blogging inappropriately, so we put this new process in place. We don't intend to be picky about what gets written because we often don't get enough posts in the first place."

Finding ways to keep blogging momentum going is not always easy, especially when blog content competes with other, more timely news sources on the intranet. At DIRTT, at the time of our research, its blogging strategies had recently diminished. One of the DIRTT intranet team members said:

> "We used to have areas where people would create blog posts and tag them so that they showed up in the relevant blog feed. However, blog posts haven't been used much lately because now, employees pay more attention to news content since it gets pushed to their inboxes via an email newsletter."

At Bracknell Forest Council, blogs were also not regularly updated and read. When users arrived at the *Find Blogs* page, they scanned the tiles and found many blogs had entries showing the most recent posts had been over six months prior. One user said, "A lot of the blogs are not kept up on a regular basis, so it's not worth following the blog."

There was an area further down on the page where users could see recently updated blogs, but employees did not scroll down to view those. The main blogs page could have better-supported users who wanted to see any blogs with recently updated posts by promoting them on the page through positioning and labeling with *New* or *Recent*. But at the time of our research, the page design only supported the task of first-time users browsing available blogs. If users were unfamiliar with the various blogs, they needed to scan each tile to see if there were any *new* posts or blogs.

### Monitor blog engagement over time to support inclusion, removal, or a modified approach.

Process and Strategic Considerations

Allowing employees to blog is one way to get more interesting and varied content on the intranet, but it may come with challenges, such as initial excitement around blogging followed by a loss of interest over time. Encourage authors to keep blogs up-to-date, and if bloggers are no longer writing blogs, consider archiving them. It's important to monitor how blogging efforts are going, to help you determine how to evolve your strategy.

If employees aren't blogging or engagement with blog posts is low, conduct interviews and observations to learn more about why. Speak with individuals who have written blog posts, as well as employees who have shown interest in blogging but never shared a post. Likewise, observe employees using the intranet and speak with them about the content they regularly consume and rely on most. This can reveal a lot about whether or if blog posts support employees' needs and goals.

Speaking with and observing employees will also help you understand what's keeping bloggers from posting and employees from reading. Once you know more about these reasons, you may begin to understand how to make the blogging process easier for contributors or the content more interesting and compelling for employees to read.

You may learn you need to modify your blogging purpose and strategy to position the content differently, or maybe that blog posts as a content type aren't supporting real needs and goals employees have. In this case, consider retiring blogs as a content type to focus your efforts on the meaningful content types that *do* support the needs of your employees and content creators alike.

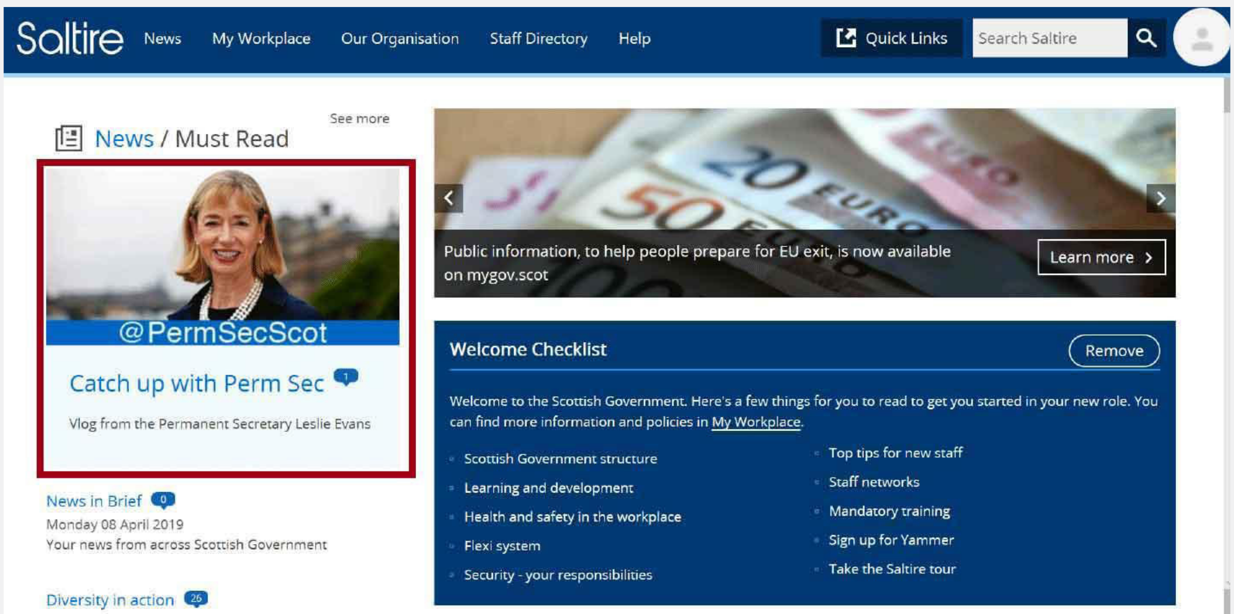
## Leadership Blogs

One particularly beneficial way blogs were used across the intranets we studied was for leadership team members to post updates and provide their perspectives on various topics. This helped employees become more familiar with leadership team members, and many employees were interested in these types of blog posts. For example, employees at the Scottish Government commented that they enjoyed seeing what the Permanent Secretary was up to from her video blog posts. As part of its content strategy, blogs at the

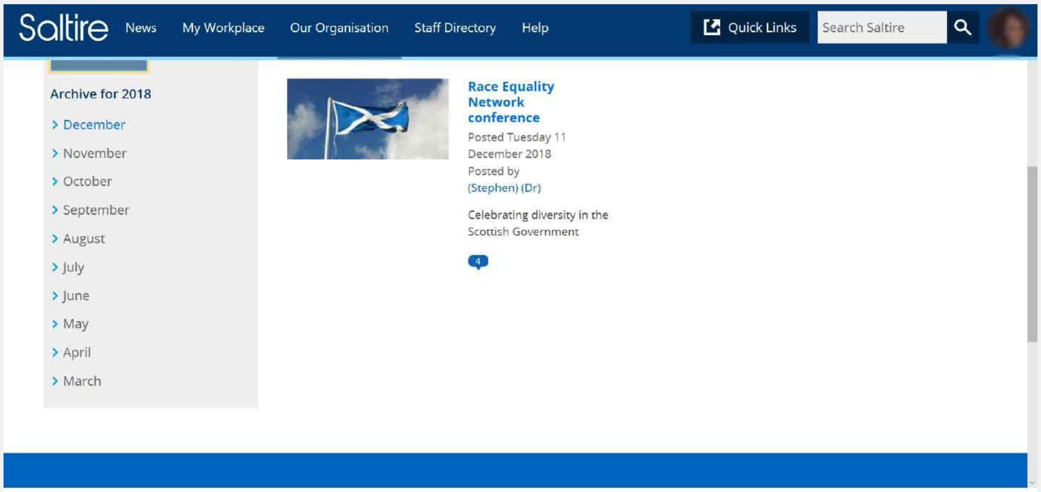
Scottish Government were completely user-generated. People at a certain level within the organization could freely post, and employees at lower levels had to get blog posts approved by their managers before posting them to the intranet.

Blog topics were all work-related and self-governed, and any comments appearing alongside a blog post were also self-governed. A member of the Scottish Government's intranet team said:

> "You can see the blog posts that have been read the most and those with the most comments. There's an archive feature for older blog posts as well. You can't follow a person or blogger yet, but the person and any relevant blog posts will always come up in search."




*Employees at the Scottish Government enjoyed watching and reading updates from the Permanent Secretary's video blog on the intranet.*

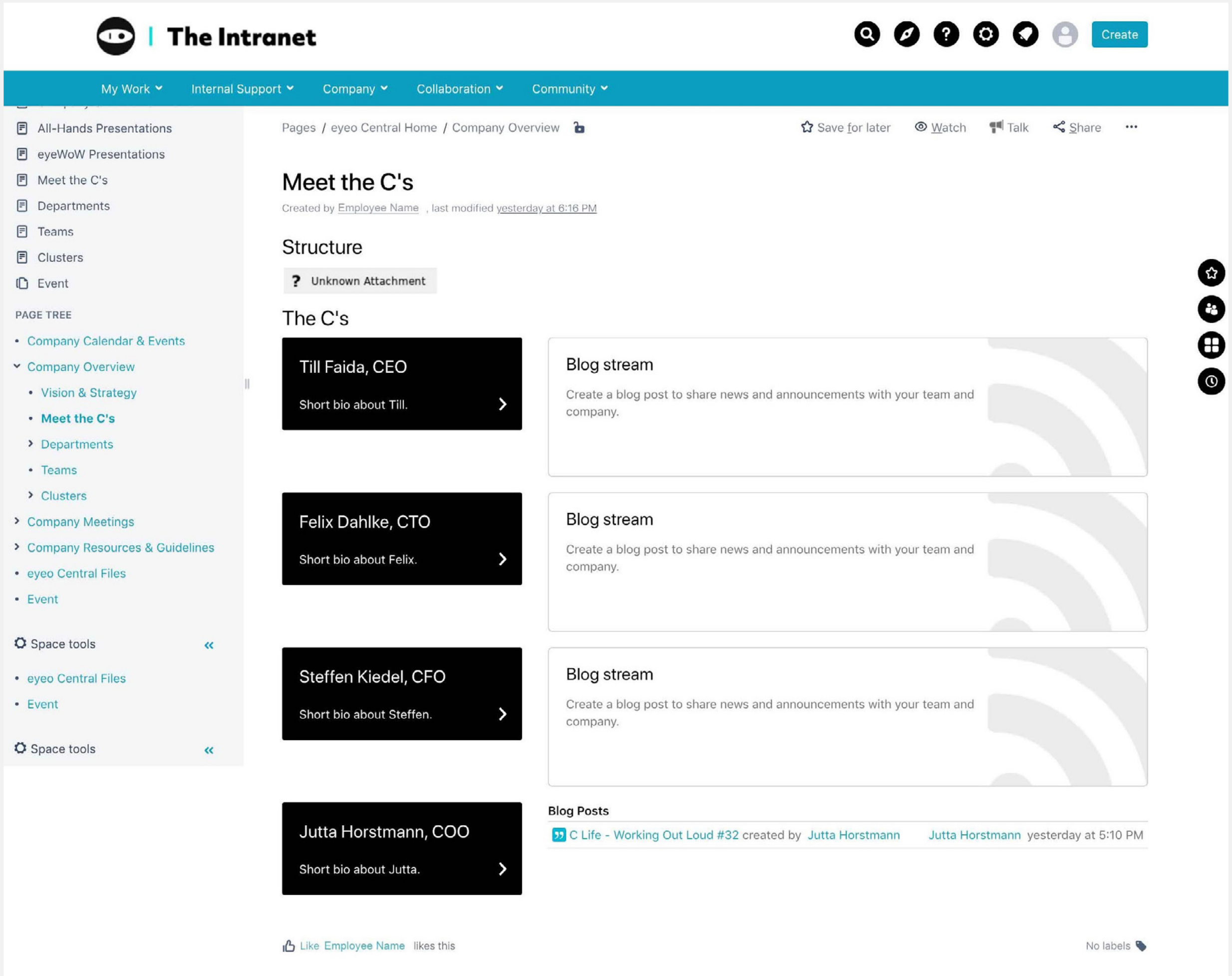



*An archive of the Scottish Government's intranet blog posts ensured older content remained findable without cluttering up the main page and search results, which was favorable.*

Eyeo encouraged employees to use blogs for longer-form stories and posts written from the writer's perspective rather than to communicate objective news or announcements. The intranet team realized that one of the main benefits of using blogs on its intranet was that fewer people interrupted colleagues in person or crashed meetings to get an update on a topic. Instead, they read blog updates. The organization's goals and expectations for the blogs were that interested employees would use them to keep people informed of what they were doing. Blogs were also used to help employees learn about and get to know the C-level leadership team, and employees paid attention to this aspect of the feature.

A few users were disappointed that not all C-level leaders wrote blog posts. The *Meet the C's* page on Eyeo's intranet featured and prioritized the most recent blog post from each executive. This approach shined a light on which leaders were (and were not) contributing blog posts. A better approach would have been for all C-level leaders at Eyeo to write their own blog posts so that they all had a recent post to display on this page, to avoid inconsistency. One user said:

> "It will suck if these stay empty and Jutta's has blogs . . . because of the discrepancy and a feature is there that sets expectations. I would rather not be reminded that they are not doing the blogs if the spot by them [the other Cs] is empty."



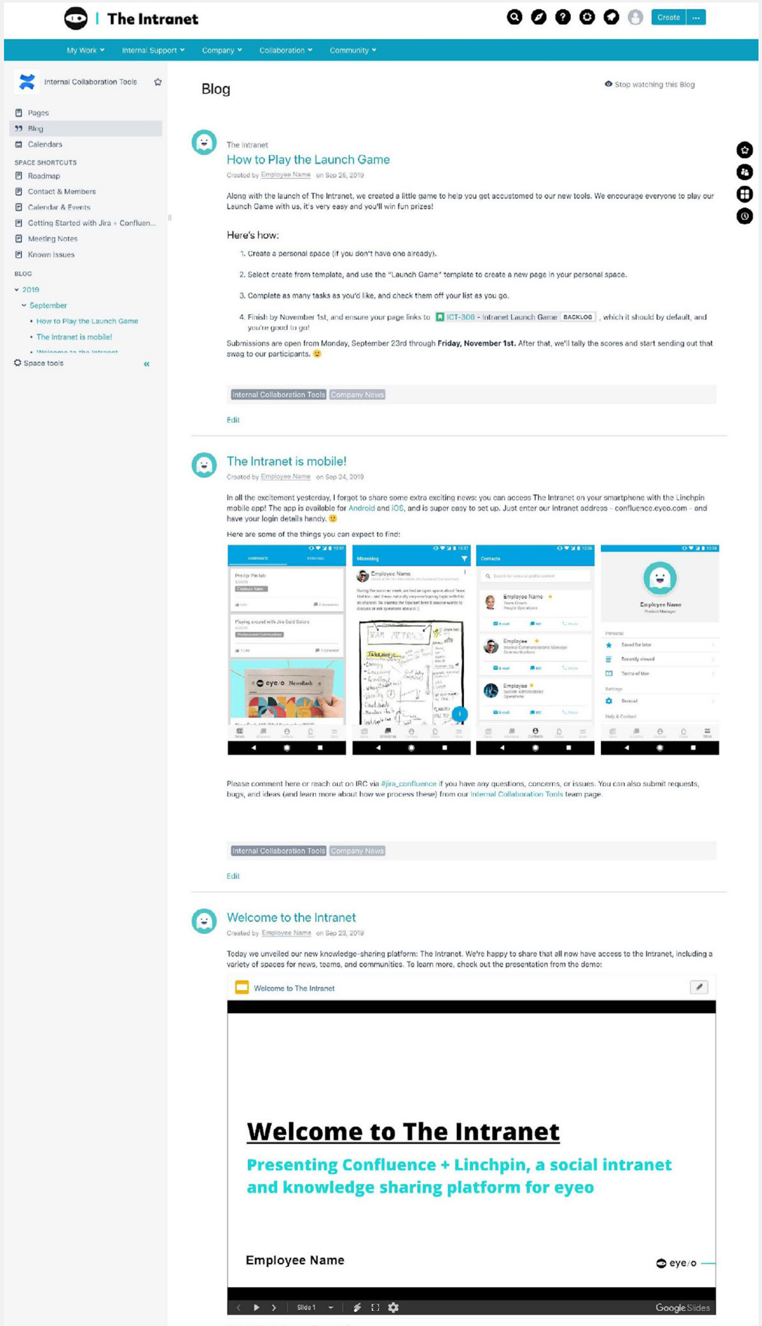

*Eyeo successfully used blogs on its intranet to keep peers and colleagues updated on projects and as a tool for familiarizing employees with C-level leaders. However, not all C-level leaders consistently blogged, which created noticeable inconsistencies on the main landing page containing all of the leadership blog streams.*

## 42. House blogs in their own section but publicize posts on the homepage and other relevant intranet areas.

It is acceptable to have one central place where employees can go to browse all blogs and posts, but it's best to also surface recent blog content on the homepage of the intranet and in other contextually relevant areas such as category, department, and team landing pages. This way, employees will be made aware of new blog posts, have many suitable and clear paths to read them, and have ample opportunities to discover more blogs of interest.

Always show blog posts in order of recency and use pagination when there are multiple pages of blog posts for a given topic or category. It's also helpful to allow users to filter by blog criteria if the content permits. Ensure applied filters are visible to users so that they can make sense of returned blogs.

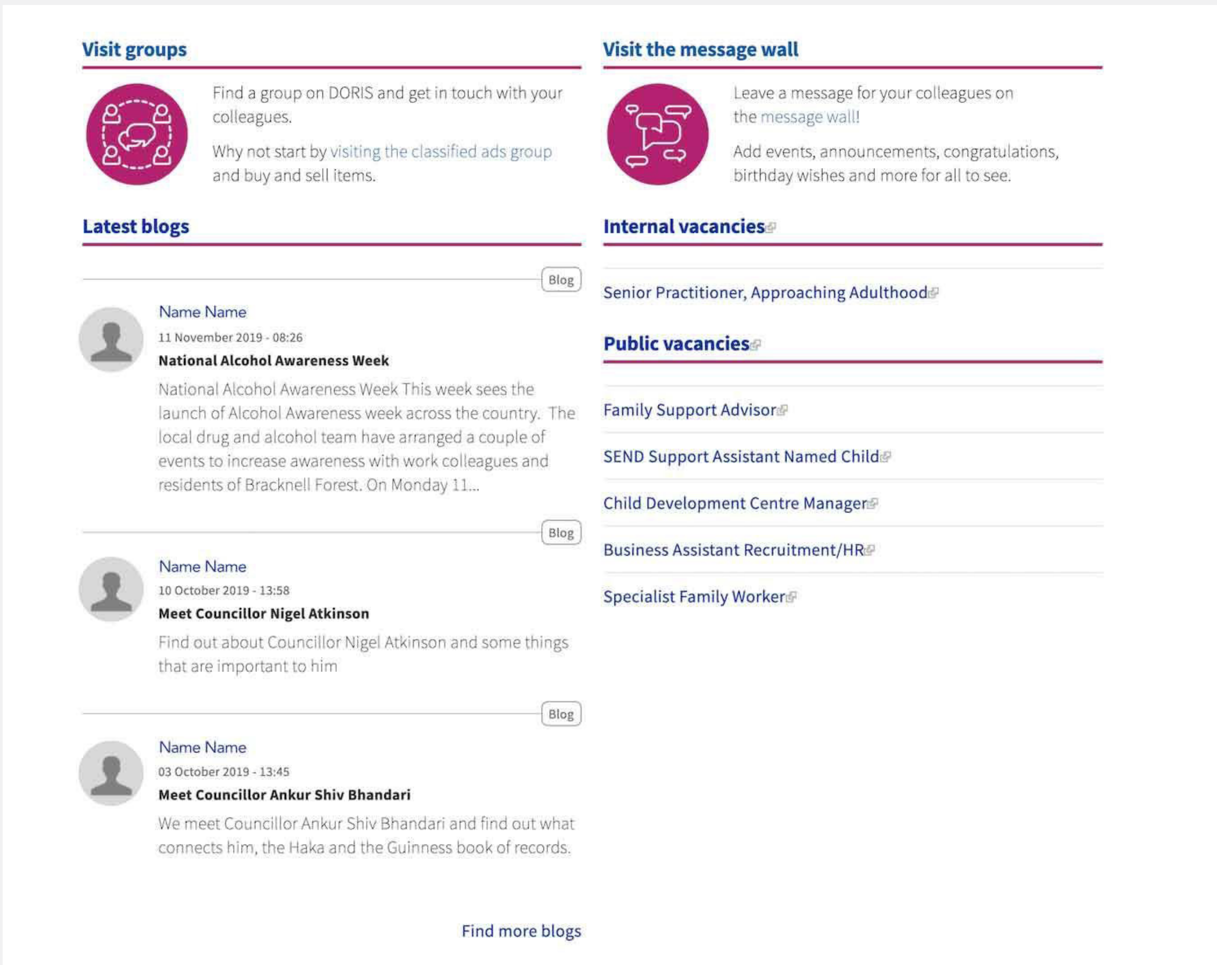
For example, at Eyeo, blog content was particularly interesting because it was associated with specific team and department spaces rather than the intranet having one central location for employees to view all blogs and posts. Aside from *Eyeo Central*, where employees could see company-wide news and announcements, there was no company-wide blog or way to browse them all. An example of this approach was the company's data team, which had many blog posts in their team space, and a UX researcher had set-up a blog in the *Research* team space. To get the blog posts to show up in *Eyeo Central* with the rest of the company news, employees could tag them with *company news*, otherwise, it only displayed in the department or team's space.




*Each team space on Eyeo's intranet had its own specific blog, and links to the blogs appeared in the same position in the left navigation for each team and department across the entire intranet. Bloggers could tag their posts with* Company News *so they would show up in the all-company news.*

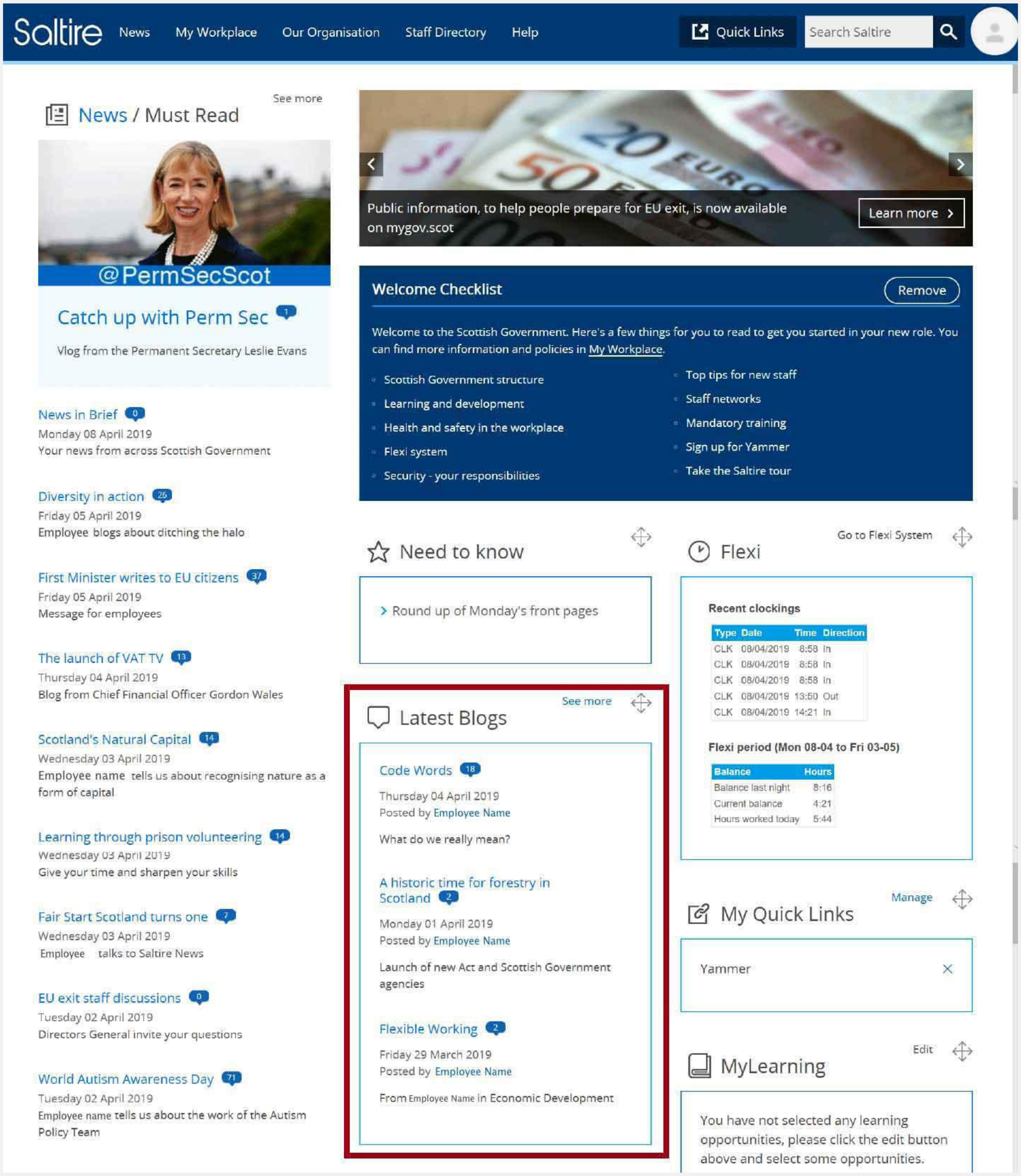
Blog discoverability was low at Bracknell Forest Council because the component featuring new blog posts was placed below the fold on the intranet's homepage. One user said, "I don't tend to look at them [the blogs] if I'm honest. This is the first time I've gone into it. I didn't know all this was here. It's strange how it doesn't appear on the front page."

Most study participants knew blogs could be found lower down on the homepage. Still, one user commented about their specific location, saying, "Once a day, I scroll down and see if anybody has been blogging. What would be great is if you could customize your homepage so you didn't have to scroll down, and you could just see what you want to." Exposing blog content above the fold or as an option in the global navigation would give it more visibility.

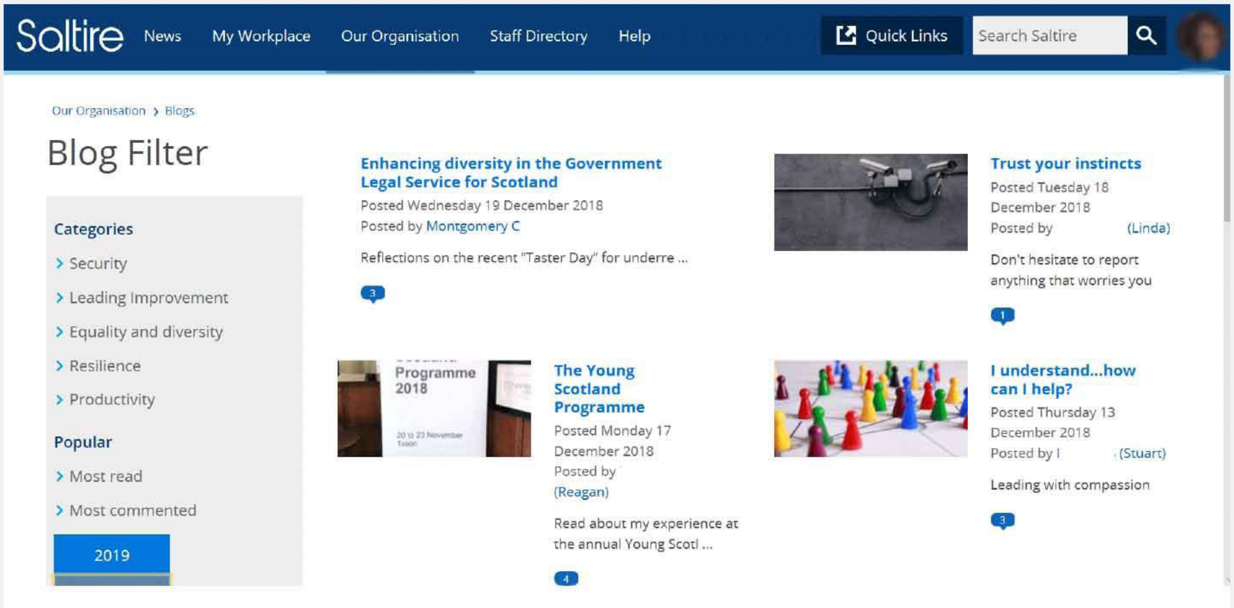



*The latest blogs were placed too low on Bracknell Forest Council's intranet homepage to gain consistent attention from employees. Moving them up higher on the page would help to make them more noticeable and findable.*

The Scottish Government included a *Latest Blogs* widget in the lower mid-section of its homepage that featured the three most recent blog posts and a link to view them all. Despite this prominent and favorable position, a few users still demonstrated varying success with finding blog posts. Some users relied on the search field, typing the keyword "blogs," while others eventually found it on the homepage. One user initially ignored the *Latest Blogs* widget, who had it on their homepage but didn't immediately realize it. They said, "I don't automatically go to blogs. I forget they are there because they are not sort of a commonly served-up piece of content. You only know they are there if they're highlighted on the homepage."



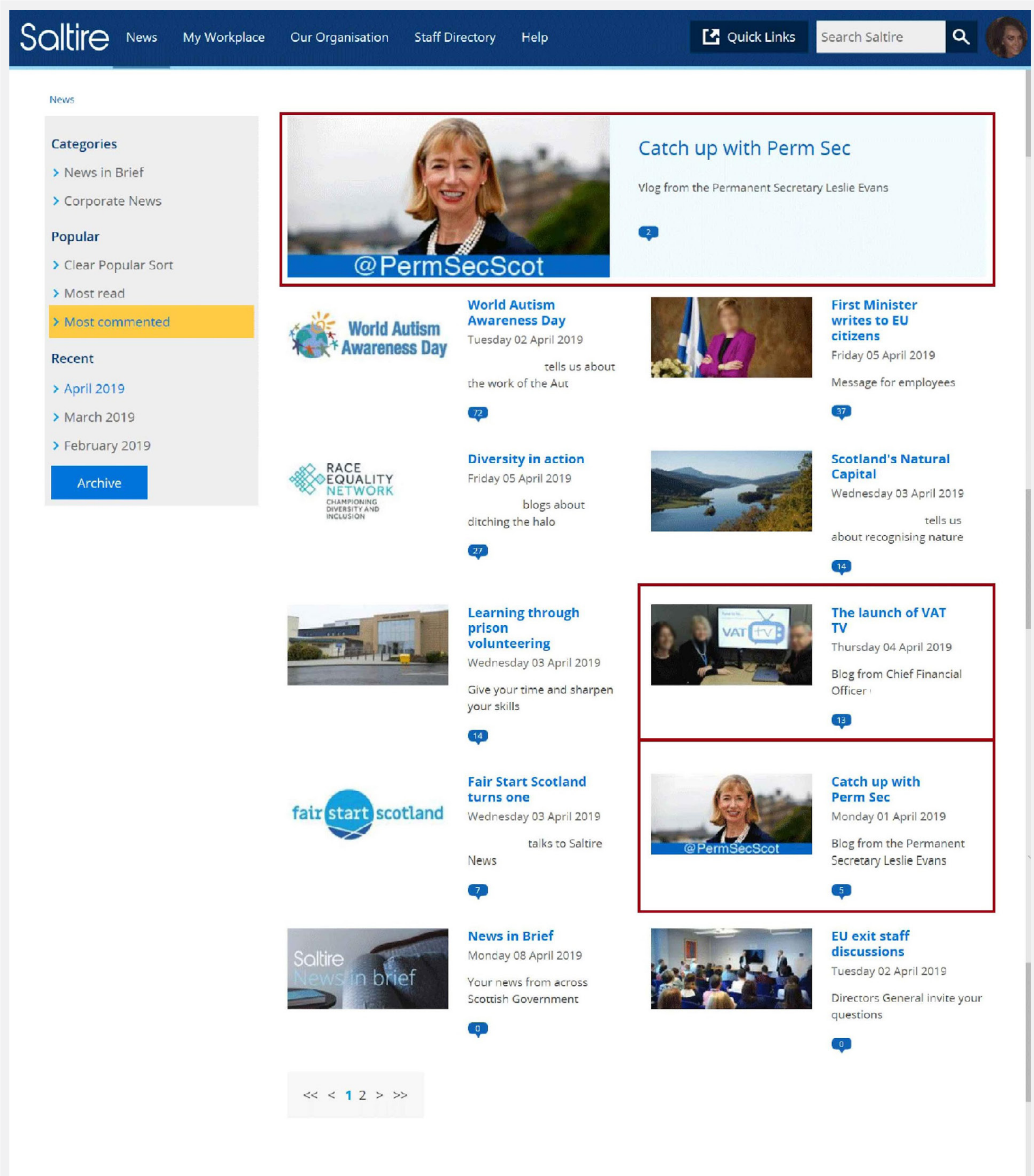

*The Scottish Government included a* Latest Blogs *widget in a prominent position on its intranet homepage; however, a few users still struggled to find blogs since the posts weren't a content type they frequently followed. Users could see how many people commented on the blog post, which was good.*




*Users were taken to this main landing page to see all posts on click of the* See More *link that appeared alongside the Scottish Government's homepage widget for blog posts.*

## 43. Differentiate blog posts from news articles and other content types on the intranet.

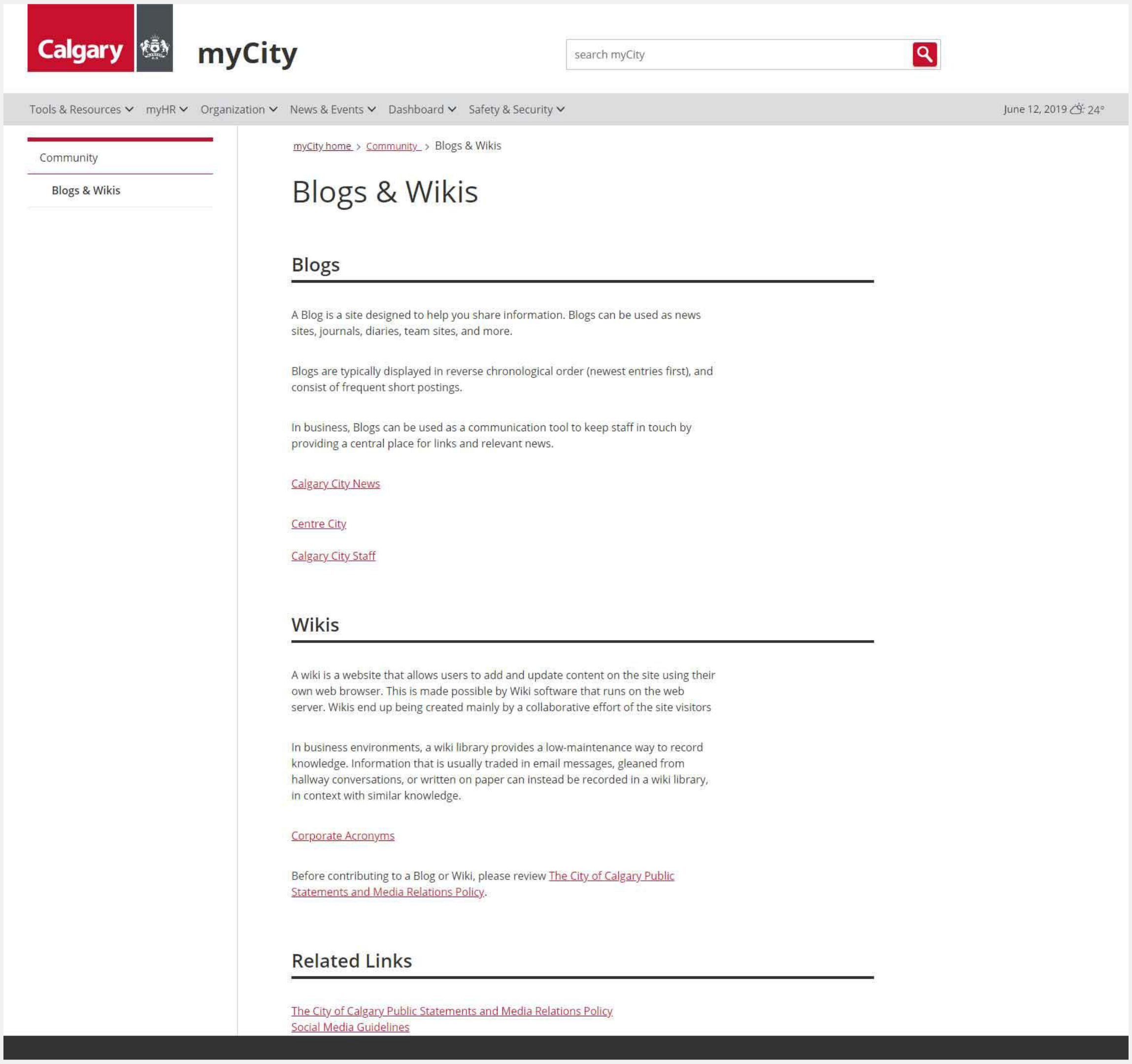
When blog posts, news articles, and announcements all existed as content types on the same intranet, blog posts were sometimes considered redundant or confused with news articles among the users we studied. This confusion was further exacerbated when organizations displayed news articles and blog posts together in the *News* section. In these instances, employees questioned the difference between a news article and a blog post, and they weren't sure where to find blog posts when this was the case. For example, at the Scottish Government, users thought blog posts could be found in the *News* section because some news articles listed blogs by the Permanent Secretary and other senior colleagues. One user mentioned they had previously looked for blog posts in the news item descriptions.




*The Scottish Government cross-promoted blog posts from its leadership team in the* News *section of the intranet. This caused employees to question whether a piece displayed here was a news article or a blog post and where to find one or the other.*

Given this confusion between content types, keeping blog posts separate from news articles is important when the two content types serve different purposes. For example, if blog posts are intended for employees and leaders to share their own personal or professional perspectives and news articles are designed to communicate what's objectively happening internally and externally as it relates to the organization, the two content types shouldn't appear in the same location on the intranet. However, if both content types are used to communicate happenings in and around the organization, it may be more acceptable to display them alongside one another, albeit with clear labeling and visual distinction, to ensure employees don't confuse blog posts with news articles.

The City of Calgary used an entire page on its intranet to explain the purpose and acceptable use standards for blog posts and similar content types. This demonstrated transparency, clarity, and empathy for employees who may grow confused by so many different content types on the intranet.

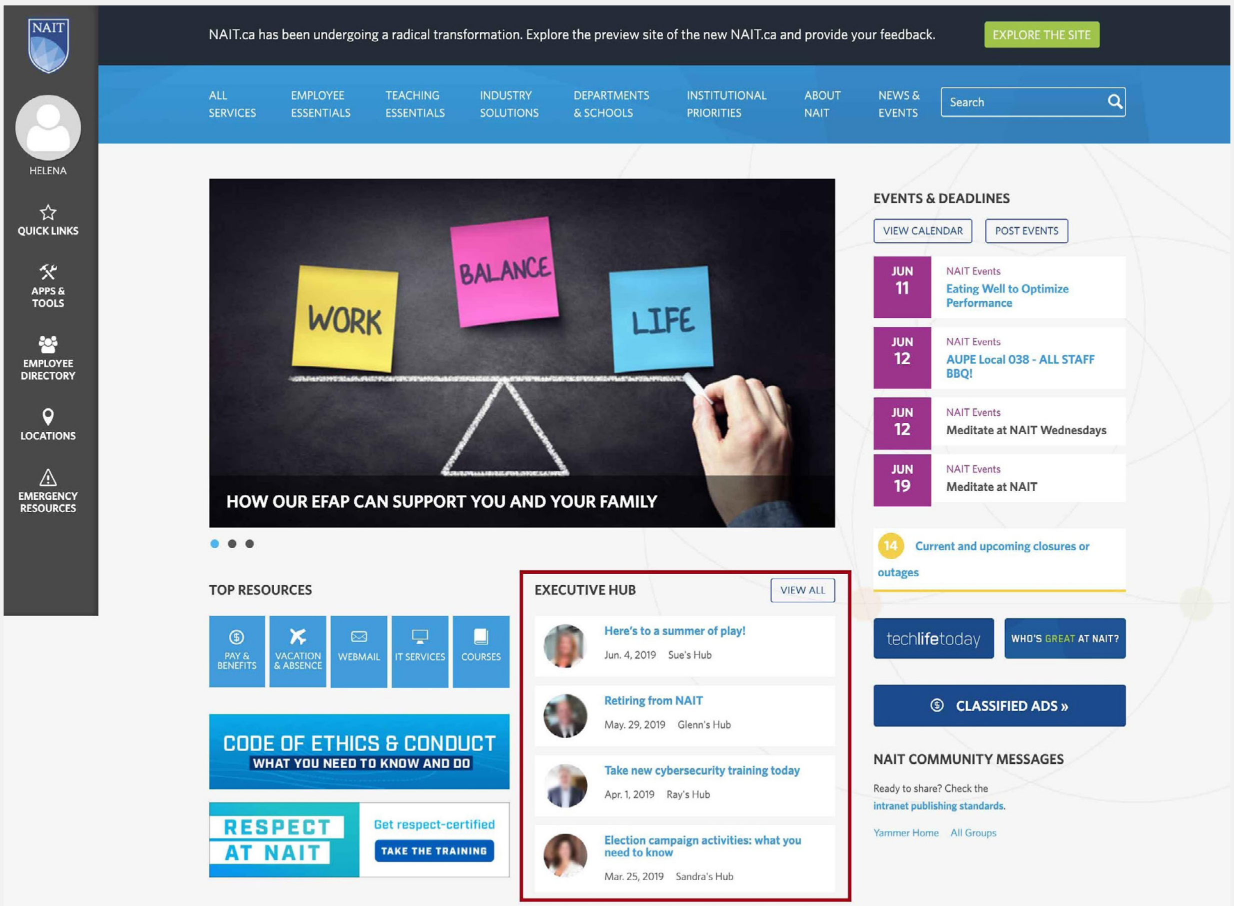



*The City of Calgary did a nice job explaining the purpose of intranet blogs and how they are an acceptable content tactic for news, journals, team sites, and more.*

Some ways to differentiate blog posts from other content types on the intranet include:

- Give blogs their own sections or space(s) on the intranet.
- Use clear labels on blog posts and other content types.
- Visually distinguish blog posts from news articles, announcements, and any other similar content types.
- Using a *blog* tag.
- Show the author more prominently (on blogs) to suggest the piece is written from their perspective.
- Use a different promotional card or treatment for publicizing intranet blog posts.

Similar to other organizations we studied, the Northern Alberta Institute of Technology used blog posts as a tool for the executive leadership team to share updates and viewpoints. Leadership blog posts could be found in a promotional widget on the homepage labeled *Executive Hub*. However, users did not fully understand the difference between these blog posts and news, and many questioned whether these were blog posts or something else. They also wondered if they could blog similarly from their own employee profile. One new user said, “Is this a blog for public consumption? I thought there might be something where I could do a blog on my profile or something like that?”

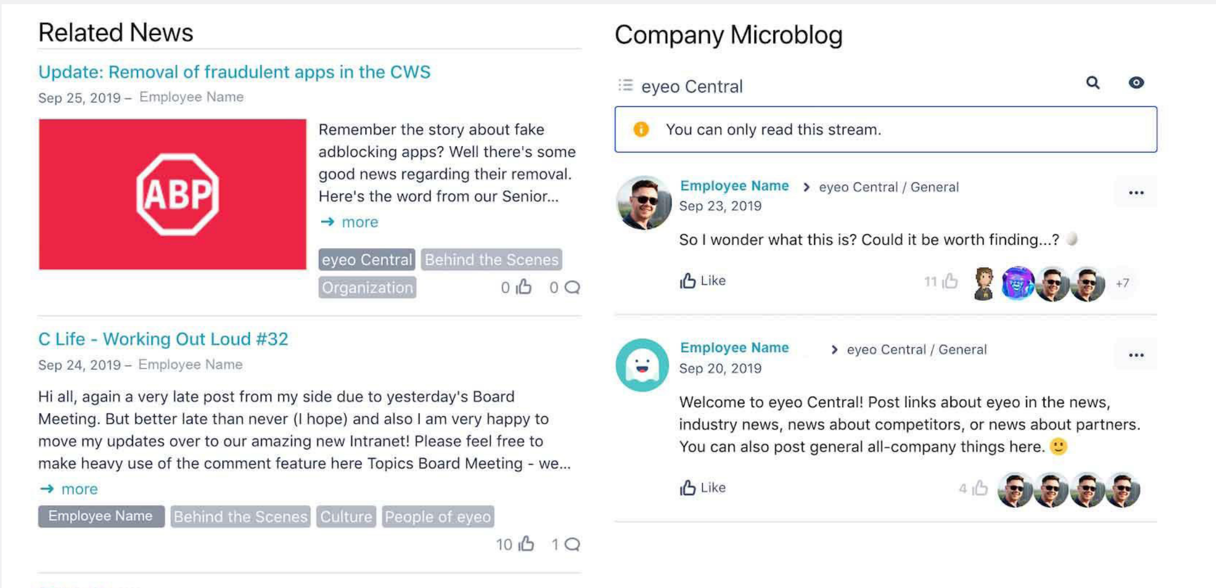



*Employees at NAIT did not understand the difference between blogs and news.*

At Eyeo, users also questioned the difference between news articles, events, announcements, and community posts, namely the difference between blogs and microblogs, which both existed as content types on the intranet. One intranet team member said:

> “We have microblogs which are for shorter conversations. It’s an activity feed like Facebook; there are different topics for those, and you have to pick a topic. We’re hoping to curtail unnecessary conversations by picking a topic and making people stick there.”

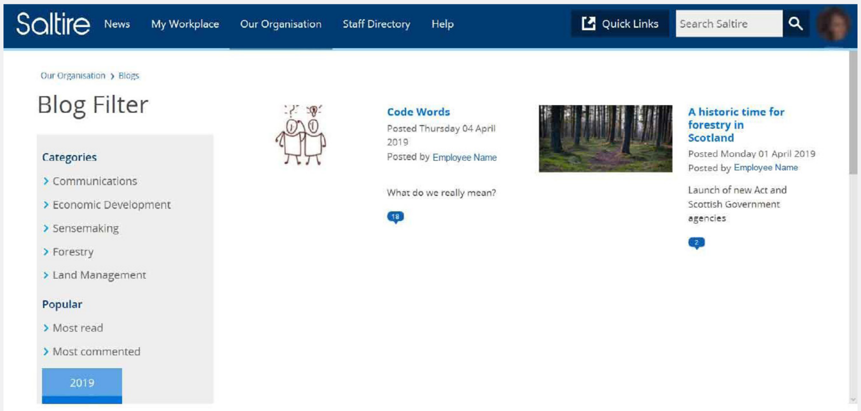
Having so many different content types to keep track of affected employees' perceptions of which articles and pieces of content were worthy of their time and attention, as well as which pieces were the latest. One employee said, "It seems like there are a lot of facets to the communication and delivery of all of these, and they seem conflated."




*Eyeo had blogs associated with team and department spaces on its intranet, as well as a microblog, which appeared on the homepage. Employees questioned the difference between blogs, news, and other content types, specifically, the difference between the blogs and the company microblog. This is likely too many content types for employees to keep track of or even pay attention to.*

## 44. Use clear titles and short descriptions for blog posts.

On the intranets we studied, sometimes blog descriptions and titles weren't informative enough to give users an idea of what they were about to read. For example, at the Scottish Government, a user commented on the title of a blog post, *Code Words*, by saying, "Code words, that's not something I would read . . . What do we really mean [reading description]? What do you really mean by this?"




*The titles and descriptions for blog posts on the Scottish Government's intranet were not clear or compelling. Their ambiguity caused users to question what the post was about and lessened their inclination to click on the content.*

Just as with other content types, using clear headlines, summaries, or short descriptions and formatting best practices are important for blog posts. Also, surfacing clear blog headlines and short descriptions on the homepage and in any other promotional widgets across the intranet will further encourage employees to click on the posts to read more.

The blog posts visited by participants during the study at Bracknell Forest Council had clear, descriptive titles, short descriptions, and well-constructed, scannable body content. Many of the blog posts used on-page headings and bullets, which made scanning the page easy. One user commented that the description of one blog post didn't interest her, but she clicked on it anyway. When she was met with a wall of text, she said, "I struggle with reading a lot of information on the screen. I think that [the blog about online scams] would put me off. I'm more of a visual person."

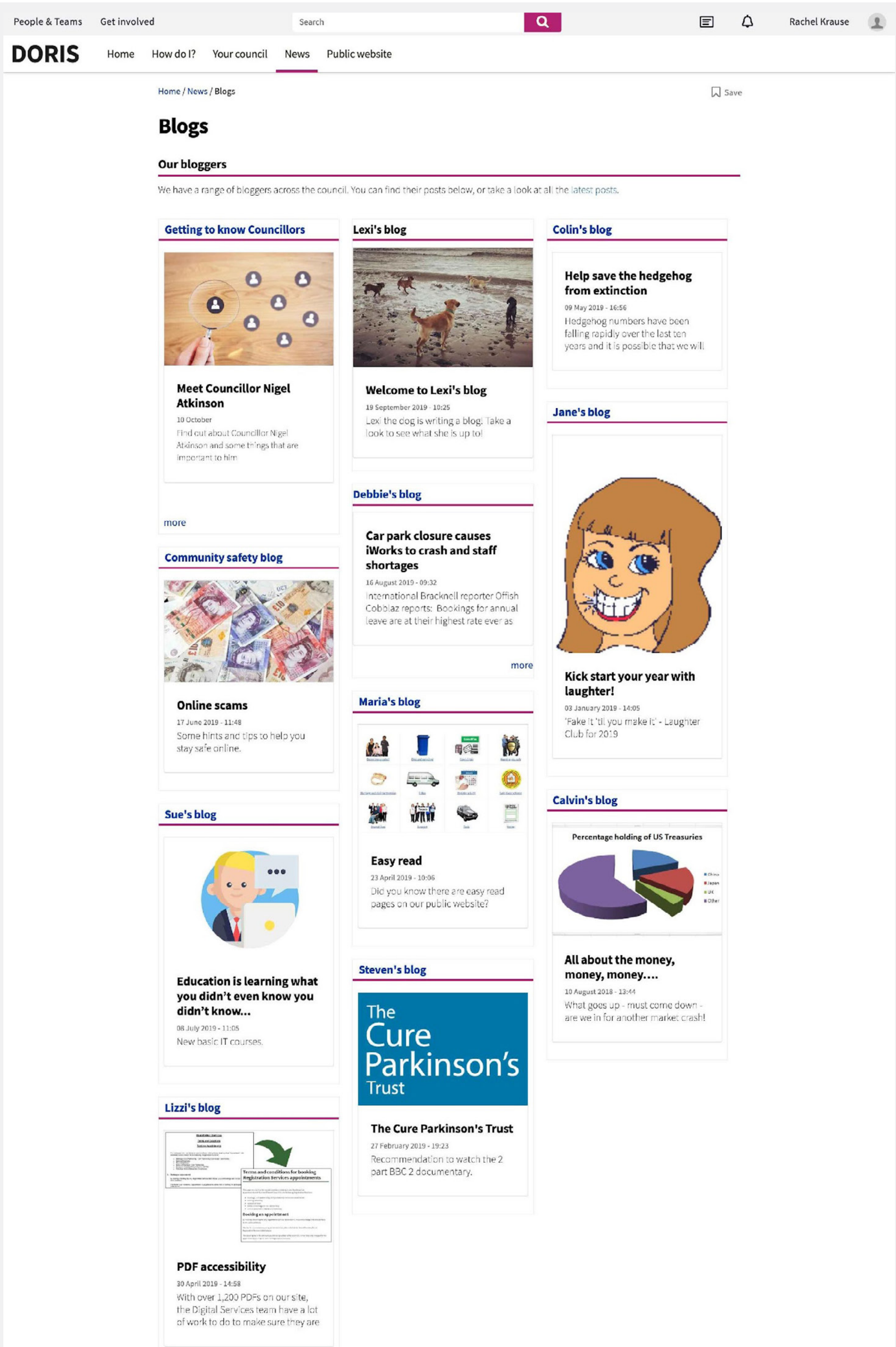
Another user commented favorably on a different blog post's headline, short description, and content layout. She said, "There's a very recent one, so I'll click on that one. Yeah, so this one is about National Alcohol Awareness Week. It's a nice use of headings and bullets."

### Train new bloggers on writing for the web and the intranet's style guide and standards.

Process and Strategic Considerations

Just as you must train content managers who are responsible for other types of intranet content, it's also important to train new bloggers on how to write for the web. Also, make sure they know what standards are in place for blogging and are aware of any style guide considerations they should follow.

It's not enough to simply give employees access and free reign to blog. For this content type to sustain success over time, bloggers also need ongoing training.




*The blog posts on Bracknell Forest Council's intranet included clear headlines, short descriptions, and images to promote engagement, all of which are favorable.*

## 45. Include social tools, communities, and interest groups on the intranet so employees can share, discuss, and interact.

Like blogs, social tools can also help employees share information and their views about business (and sometimes personal) topics. Because social features such as posting a status, commenting, rating, and liking are so common on the mainstream web today, using them in the workplace is second nature to many employees. However, employees can be self-conscious about offering their opinions, certainly negative ones, in the workplace — especially if they involve a superior, manager, or leader. To make internal social networking work, organizations should provide the following:

- A simple UI that makes participating easy
- Manager support as well as sanction and their participation in the use of social features
- Guidelines about appropriate use
- Constructive, positive feedback and guidance if people use the features in an inappropriate way
- Seeded content that users are interested in, along with a question or call-to-action at the end that invites them to comment
- An experience beyond simply turning on out-of-the-box solutions; determine what works for your employees, your culture, and your needs

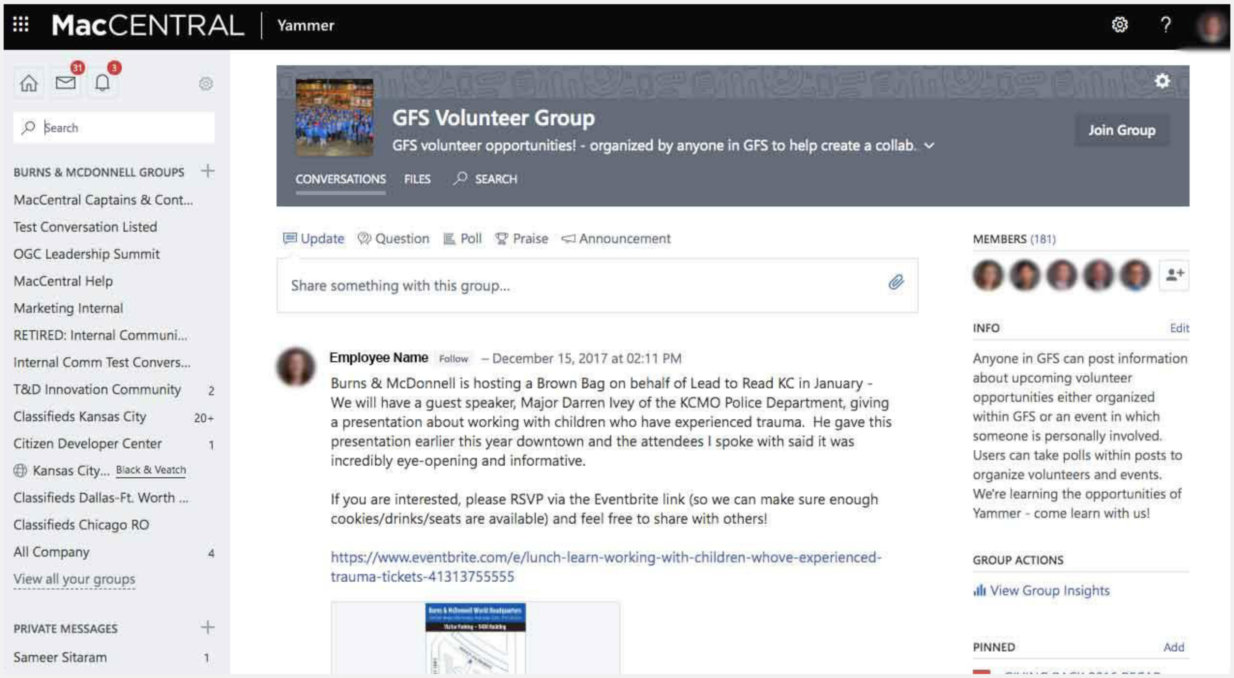
Social tools can help connect employees, whether they're working remotely or in the office. These channels encourage and facilitate communication and inspire collaboration. Employees who are comfortable sharing ideas with their peers on the intranet's social channels often forge new relationships, facilitate cross-team collaboration, and help the company work more efficiently and effectively overall.

For example, at Burns & McDonnell, employees appreciated the ability to connect with each other on the intranet's *Communities* which were powered by Yammer. Users were aware of Yammer communities and actively participated in them to discuss topics of interest. Users shared sentiments, including:

> "It's that community and connectedness."

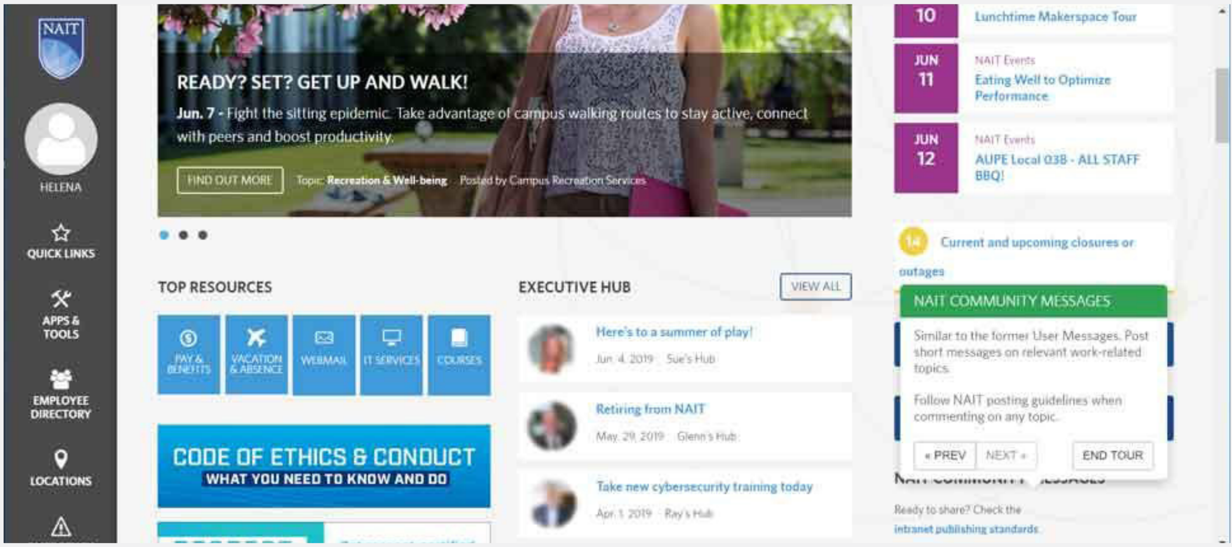
> "I do love the way that you can have ongoing engagements and conversations with people in context."

> "This is the only cultural or ancillary thing I do on MacCentral."




*Employees at Burns & McDonnell enjoyed engaging with one another on the intranet's social channels, powered by Yammer.*

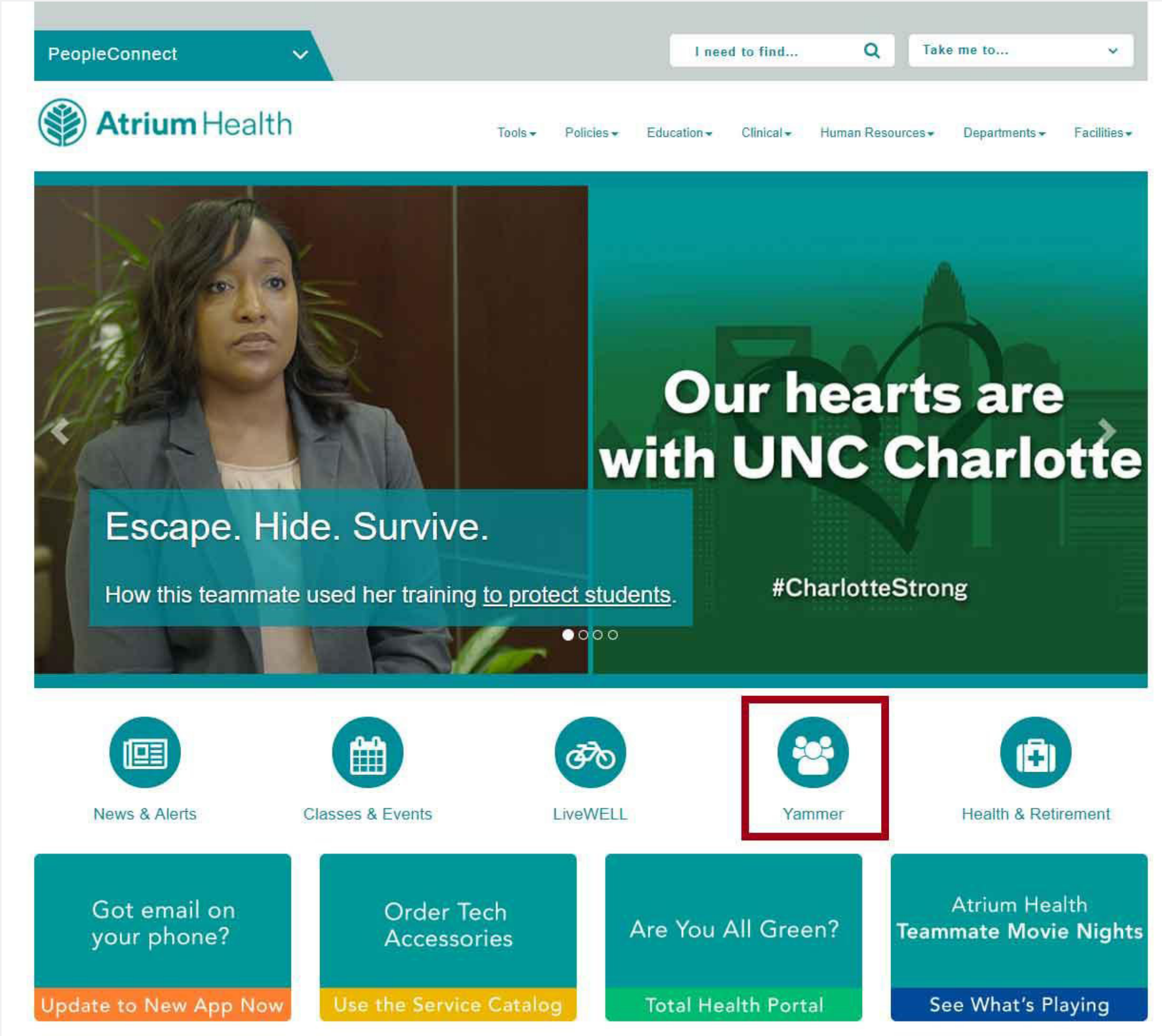
The Northern Alberta Institute of Technology's intranet was integrated with SharePoint for collaboration and also included Yammer and Jabber social tools. Yammer, which was branded as *NAIT Community Messages* on the intranet, was actively used by employees. Each department also had the option to have its own Yammer channels. In addition, many private and public social spaces also existed on Yammer. The two other social tools, Jabber and Microsoft Teams, were not as widely used by everyone in the organization.




*The Northern Alberta Institute of Technology incorporated social channels powered by Yammer on its intranet under the name Community Messages. These messages were fed into the intranet's homepage and other department and team pages. Users could freely post, comment, and like content.*

At Atrium Health, employees also found gratification from connecting with other employees on Yammer. One member of the intranet team said:

> "We use Yammer like Facebook. It's right on our homepage, and the whole organization has access to Yammer. There are over 900 groups. We try to keep some governance; like, if there's a cat group, we're not going to allow a kitten group. We only have to take people off like once a year. The biggest scare with launching Yammer was worrying about what people post, but it's not an issue."




*Atrium Health's employees also enjoyed interacting with one another on the intranet's social channels. A link to Yammer appeared prominently on the homepage.*

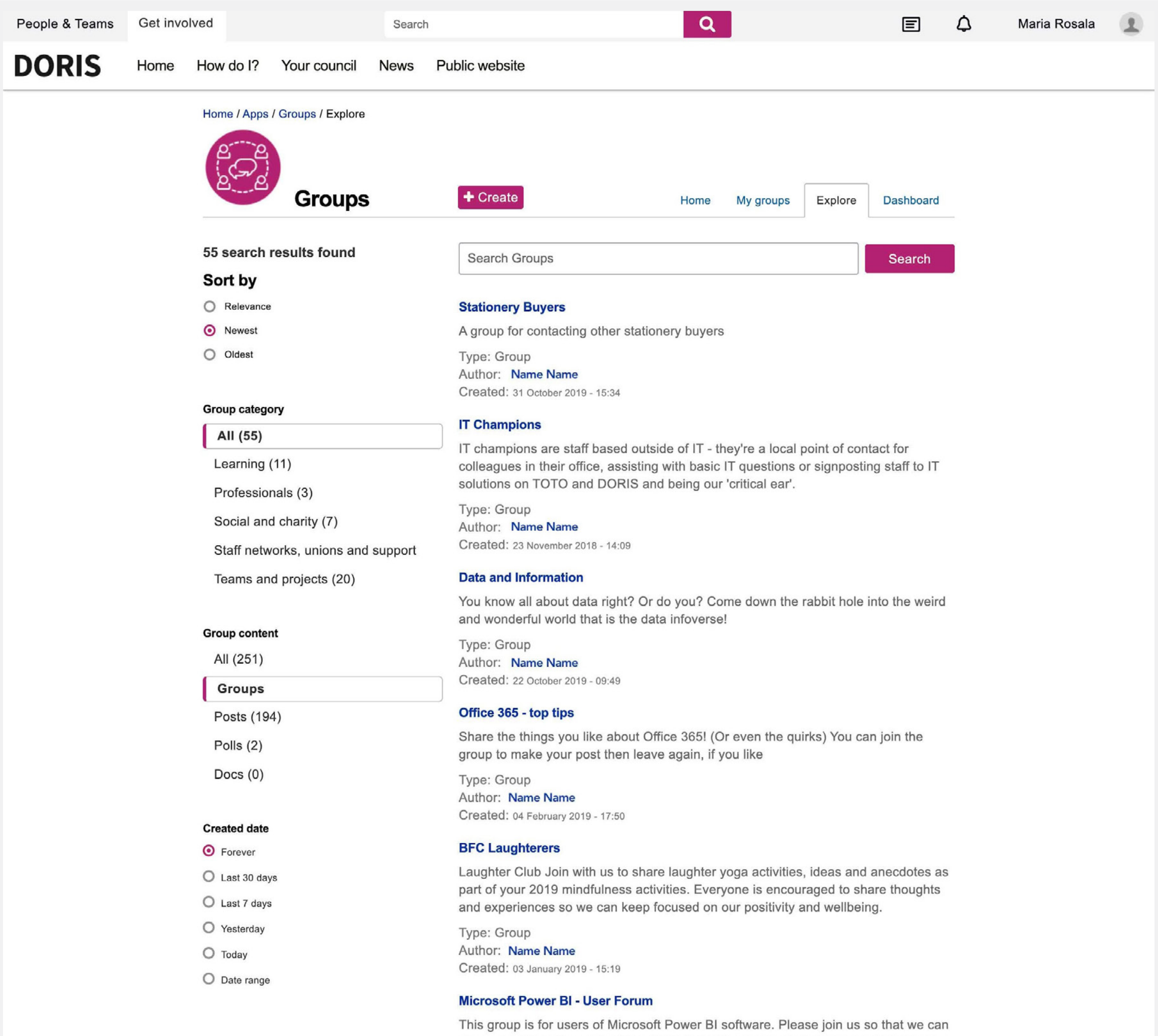
Similar to social channels, Bracknell Forest Council included social interest groups on its intranet. Each group had its own message wall where employees could post and communicate with one another. For them, groups were a place where people could create mutual comradery and engage in conversation around related interests, and anyone could join groups whether they were open or closed.

However, the interest groups at Bracknell Forest Council were not without their challenges. The team described how they usually started out with enthusiasm but often didn't sustain the same level over time. One of their team members said:

"We tried to do interest groups in places that are useful. For example, intranet content publishers got added to the publisher's group. We have documentation in there, and people can pose questions, but we found that people didn't really use it. You can tag people individually, but you can't tag the entire channel, so it required users to come back and check the groups themselves, which they didn't often do, unprompted."

"AskIT is another interest group we have where employees can ask a really silly question without raising an IT ticket or calling to ask. This works because someone has the time to call and respond to these, but we are really pushed for resources to largely promote groups. They need it, though, because people in the group don't always keep the engagement up themselves."




*Bracknell Forest Council included interest groups on its intranet. While there were many available groups, the team described challenges related to waning engagement over time.*

**Ensure there's a plan for how to sustain social channels and their content beyond the initial launch.**

**Process and Strategic Considerations**

Beyond the social channels' launch, make sure you have a plan for how to drive ongoing interest and engagement. Some good ways to do this are to advertise or display social feeds in contextually relevant areas of the intranet and continually seed the channels with interesting content to help drive user adoption.

It's important to be realistic about social tools in the workplace. These tools can work well to achieve organizational and user goals, but it's hard work to make them sustainable over the long term, and it doesn't always happen automatically or organically.

## 46. Begin experimenting with social content through classifieds and photo sharing.

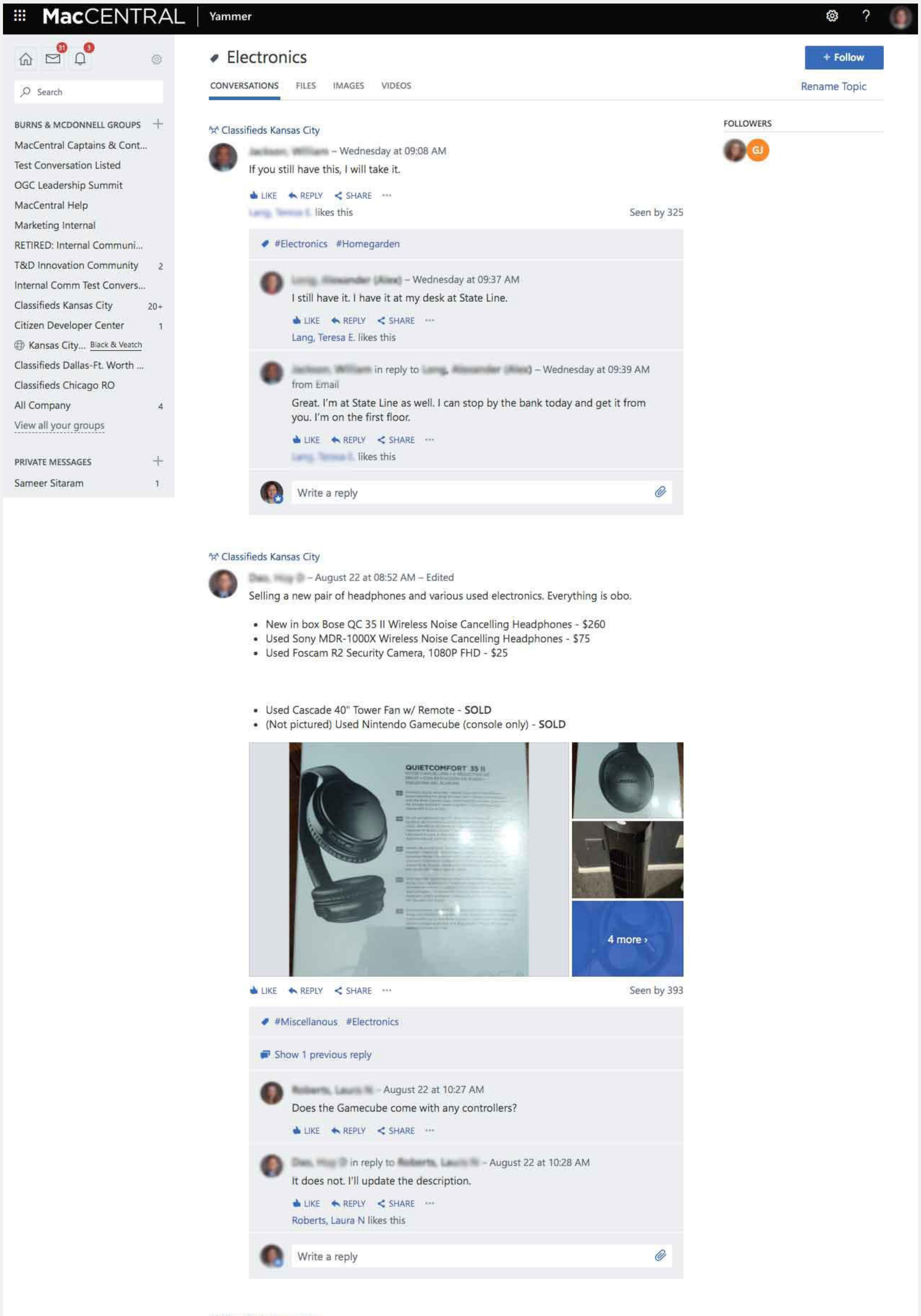
Employees are often quite familiar with mainstream social channels, yet they may not immediately realize that a tool named Yammer or an area labeled *My Communities* are social channels. At the organizations we studied, we noticed that the intranets that were most successful with social engagement tailored their strategy so that employees were interested and engaged in the types of content posted there from the start, as opposed to flooding the spaces with meaningless content.

Two particular ways we observed employees positively interacting with social tools such as Yammer were:

1. Sharing photos
2. Reviewing classifieds

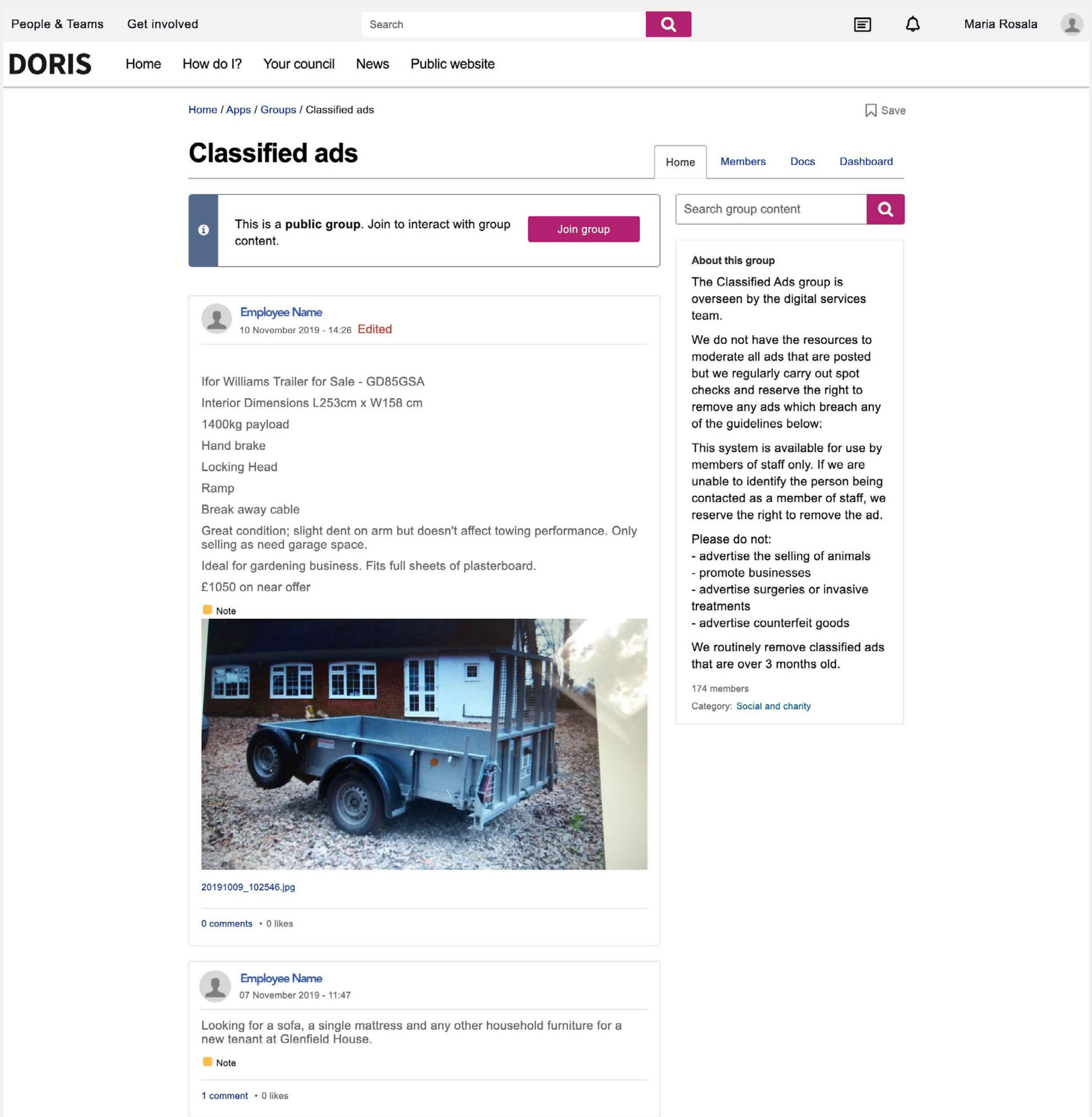
If you're just starting out with your intranet's social strategy or considering adding social features to your digital workplace, these may be two purposeful ways to successfully introduce the concept on your intranet and allow you to experiment and learn what employees like, dislike, engage with, or ignore.

For example, at Burns & McDonnell, employees weren't sure what Yammer was, while others only thought of Yammer as a way to look at classified ads. One user said, "Yammer was a replacement for classifieds, I think." In many cases, the employees at Burns and McDonnell said they enjoyed reviewing the classifieds to post wanted ads or to see what other colleagues were selling.




*There was much employee engagement in the classifieds section on Burns and McDonnell's intranet.*

Bracknell Forest Council also incorporated a *Classified ads* section on its intranet. After asking one user to find something interesting to read on Yammer, they said, “When I use Yammer, I usually go to the classifieds. Maybe once a week, I’ll flip through to see if there’s anything worth buying.”

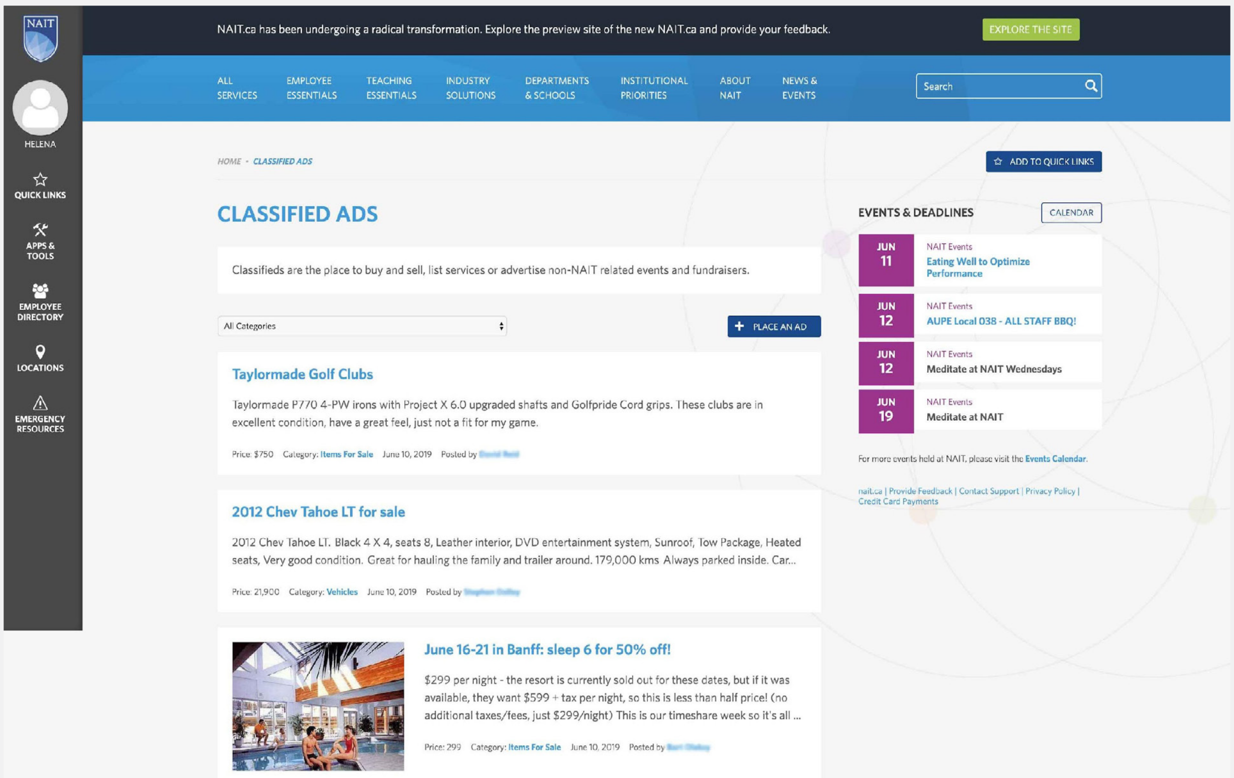



*Bracknell Forest Council included a* Classified ads *interest group on its intranet. Classified ads remained here for three months before being taken down. Employees commented that they enjoyed seeing what their peers had for sale.*

The Northern Alberta Institute of Technology also included classified ads on its intranet. A clear disclaimer at the top of the page explained the purpose of the marketplace:

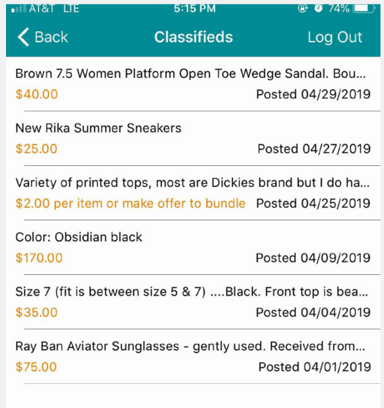
> Classifieds are the place to buy and sell, list services, or advertise non-NAIT related events and fundraisers.

The clean, list-based design made it easy for employees to look at what was for sale by category or simply scan the entire list to see everything. Employees could add an optional image to each ad to bolster sales.



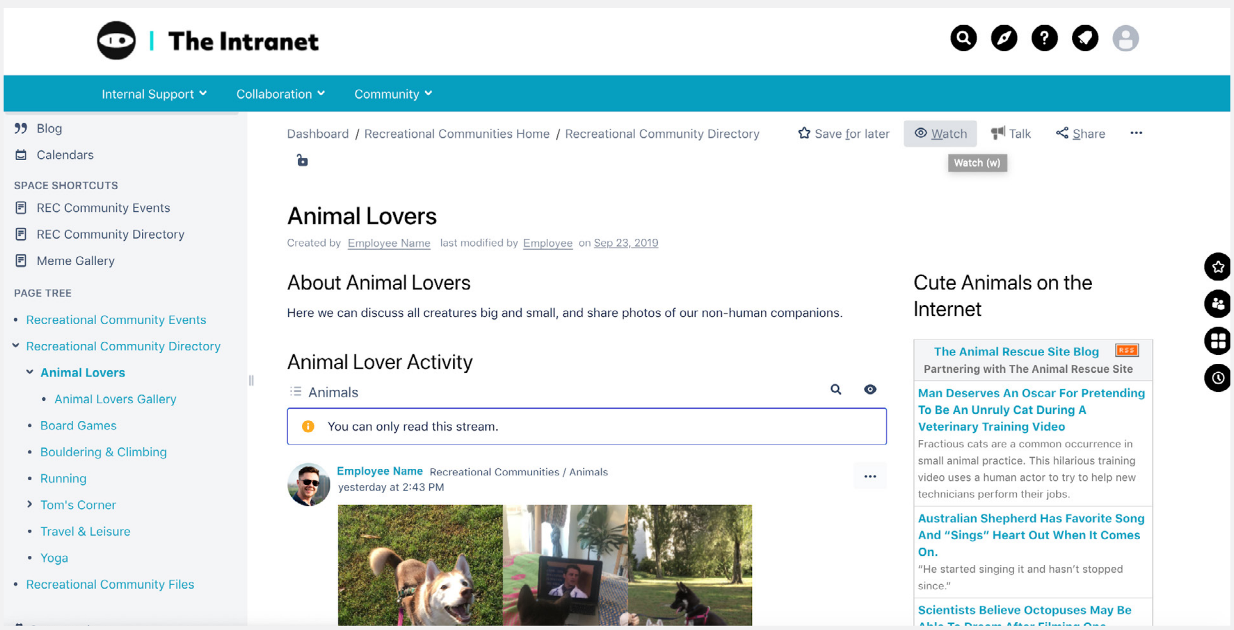

*NAIT also included classified ads on its intranet and allowed any employee to post something for sale or post a wanted ad.*

Knowing this was an area of interest for employees, Atrium Health had classifieds on the desktop version of its intranet and also on the mobile app. Its intranet team lead said, “We know from analytics that people spend a lot of time in the classifieds.”




*Knowing employees spend a lot of time there, Atrium Health included a simple list of classified ads in its intranet's mobile app.*

Two of Eyeo's social channels — pet pictures and a meme gallery — worked well to drive interest and engagement in the social communities section of the intranet.

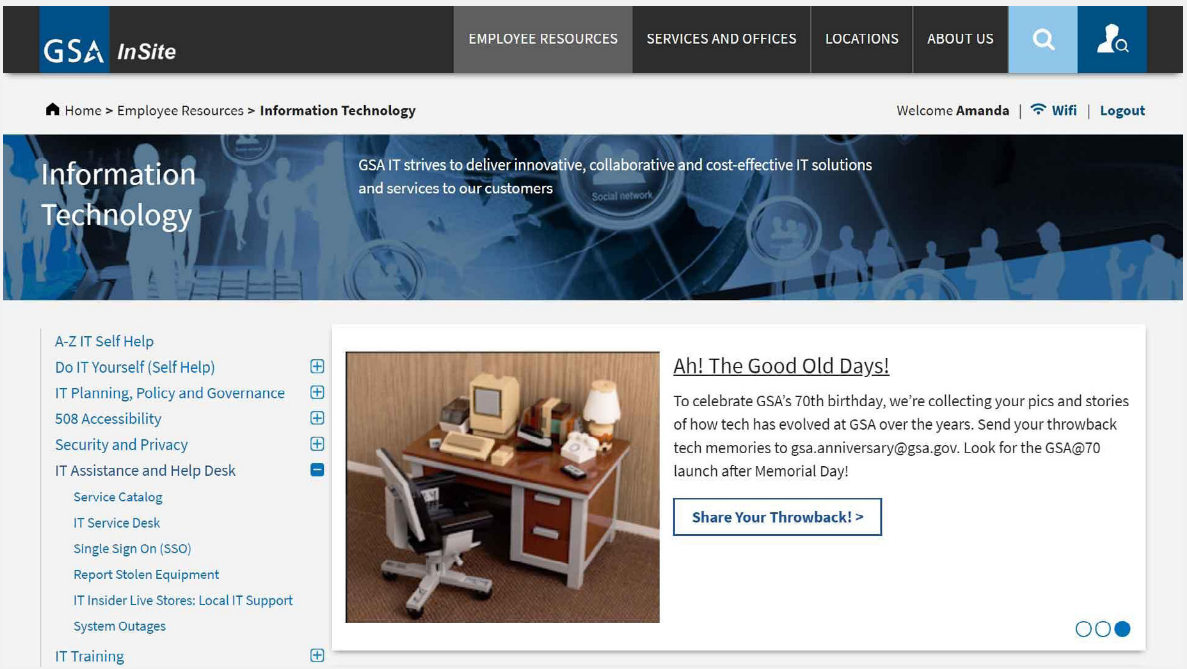



*Eyeo included a social channel that allowed employees to post adorable pet pictures and a meme gallery so that employees could post funny photos on its intranet.*

First Solar made experimenting with social content part of its content strategy and culture. They experimented with blogging through a content series called *Series 6* and had a corresponding Yammer feed that provided supplementary content. That content series' release timing was favorable, as it helped make people more comfortable with Yammer.

First Solar seeded content on Yammer to drive interest and engagement when the organization was renovating one of its major production facilities in Malaysia. This was a favorable approach. An intranet team lead described how this played out:

> "We were ripping out lots of equipment, so people would see this giant empty floor. So, we said, let's throw a party for the first piece of equipment arriving, a sort of welcome celebration. We invited employees to take selfies with the new machine and we encouraged them to post their pictures on Yammer and follow along. This got people using Yammer and got them excited about it. Many people posted pictures, and as a result, many of them even downloaded the Yammer app on their phones to follow along."

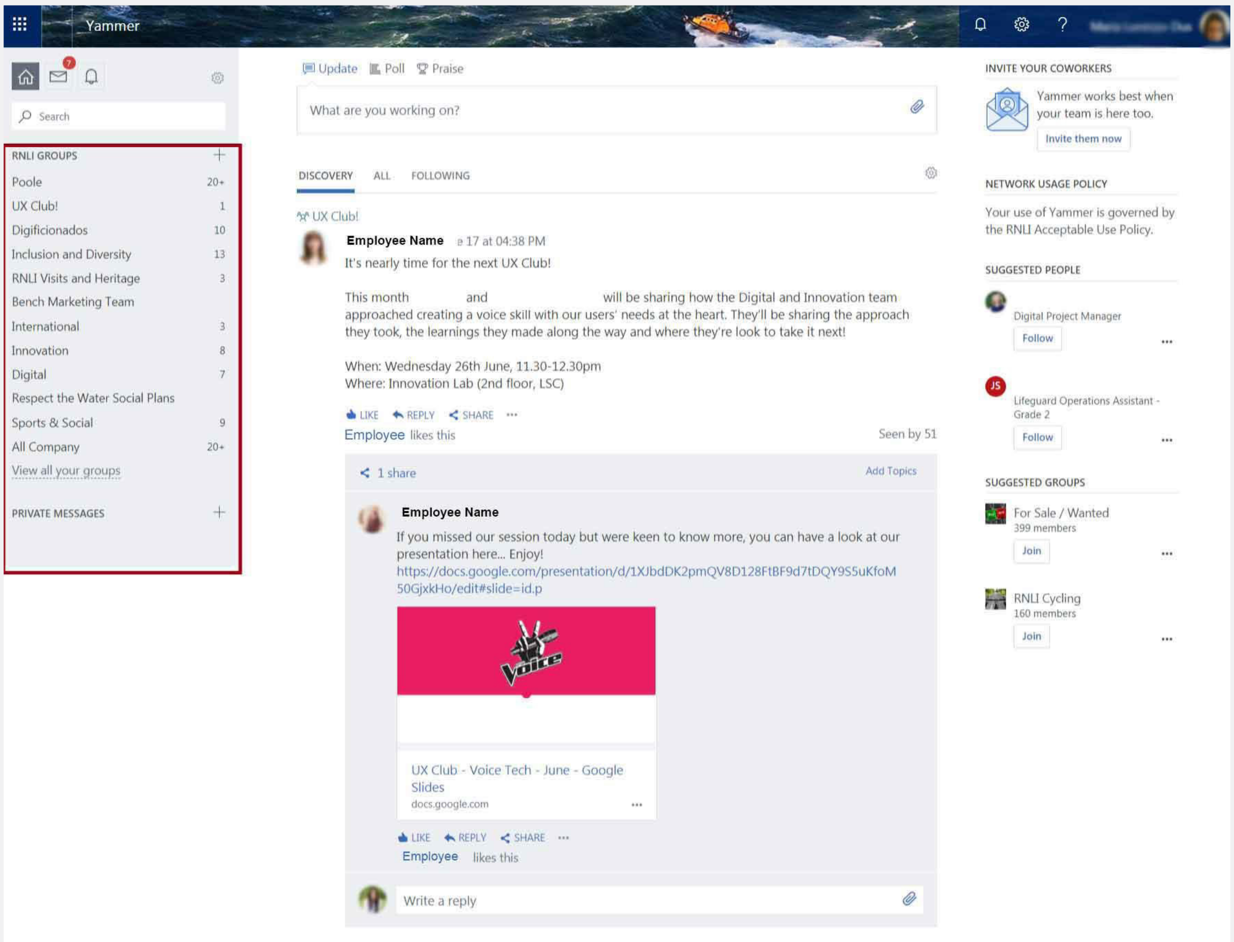



*Similar to First Solar's success with employees sharing photos on Yammer, the GSA also drove social engagement among their employees by allowing them to share their throwback technology photos on the intranet.*

## 47. Provide clear names and descriptions for all communities, interest groups, and social tools on the intranet.

Avoid using obscure or conceptual names for social channels on the intranet. When it was difficult for employees to immediately understand what a social channel was about or what content and topics it focused on, they were less inclined to engage with the content or follow it in the space. Unclear names and a lack of descriptions for social channels created confusion and diminished employees' perceptions of them.

For example, Burns & McDonnell used a social channels category called, *Most Popular*, but this name lacked context and didn't entice users. In the *My Stuff* section of the navigation, users did not interact with the *Most Popular* because the category label was so broad that it didn't appeal to users. With such a large organization, *popular* represented a huge unknown, and it didn't explain why those channels were so popular; is it popular by view count, most viewed around the world, in your local office, or most popular in the last month? Narrowing the scope of this social category, for example, labeling it as the most popular in a city or division would have helped provide clarity and enable employees to predict better what type of content will be in that category.




*Unlike some of Burns & McDonnell's labeling for social channels and groups of channels, the Royal National Lifeboat Institution used clear channel names such as UX Club, Poole (location-specific), and Inclusion and Diversity, which was favorable.*

At Bracknell Forest Council, browsing for interest groups and communities was difficult due to the sheer number of groups and how they were often named. Some participants searched to find groups they were interested in and struggled with the keywords. For example, one user tried to search for a group related to recreational activities and struggled to find anything. They said, "I like film . . .” and proceeded to type *films* in the search box but received no results. The user then typed in *cinema*, which also returned no results. A third search for *movies* also didn’t reveal fruitful results. He then said, “I guess I need to create a group! What else do I like?” He continued with searches for *dogs* and *walking* and, after continuing to find no related groups, said, “This might be for more work-related things that people make groups for. They’re more business related . . . I’m disappointed . . .”

Private interest groups at Bracknell Forest Council often had no descriptions, which explains why the user we tested with struggled to find any in search. Without details, it was difficult for users to decide whether to join, as they had to decide based only on the names of available groups alone. One user said, “It doesn’t actually have much information that I can see without requesting access . . . I don’t really want to join something that I don’t really know it’s about.”

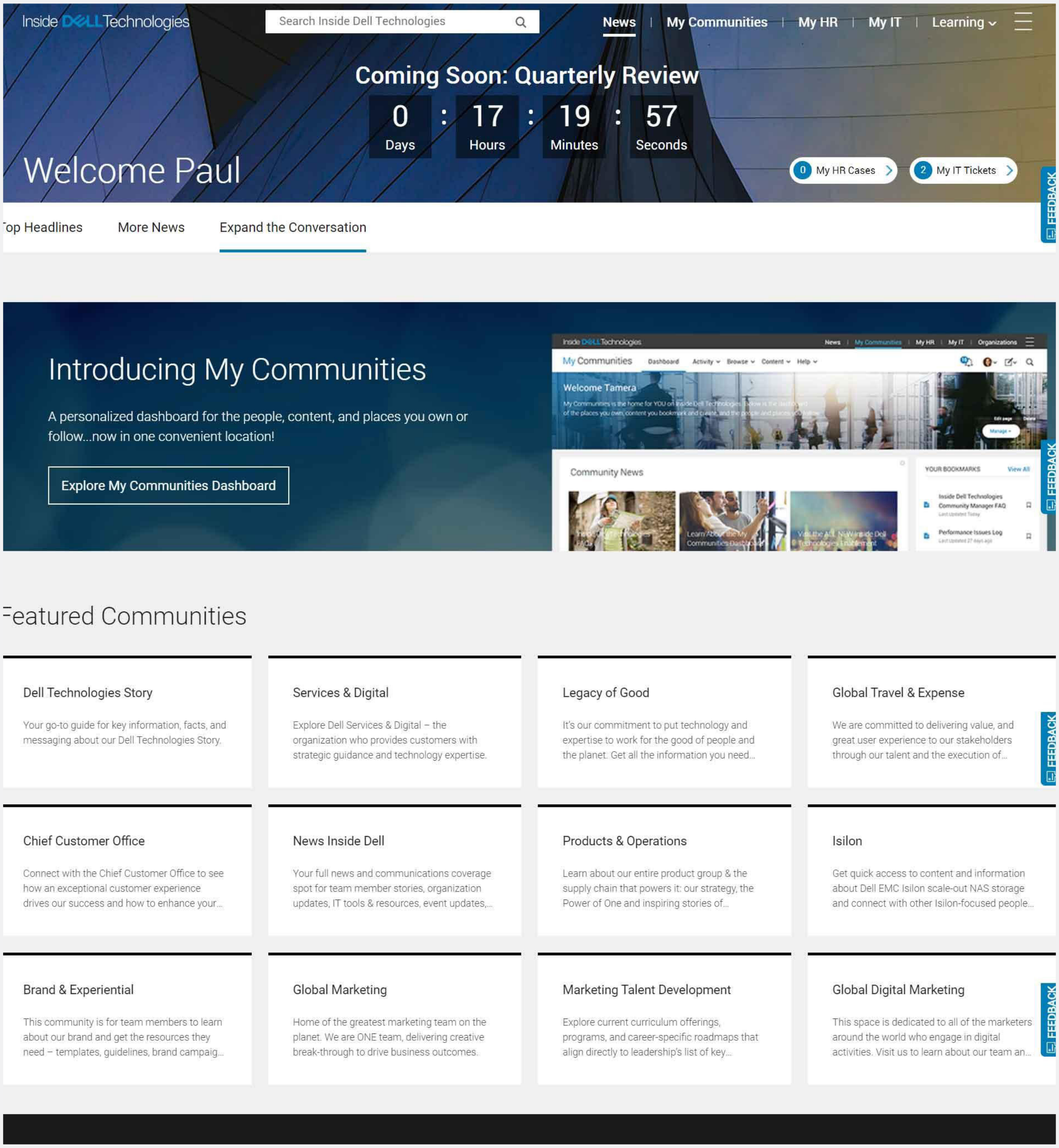
### Allow employees to create groups and social channels on their own.

**Process and Strategic Considerations**

It’s acceptable to allow employees to create their own social channels related to specific interests, their team, or even their department; however, make sure someone on the central intranet team or within the organization continually monitors social media channels for duplicate channels or any content, comments, or discussion that may be inappropriate for work.

Create guidelines to ensure that people creating interest and social groups understand that they need to include a clear name and description, the purpose of the group, and who should join.

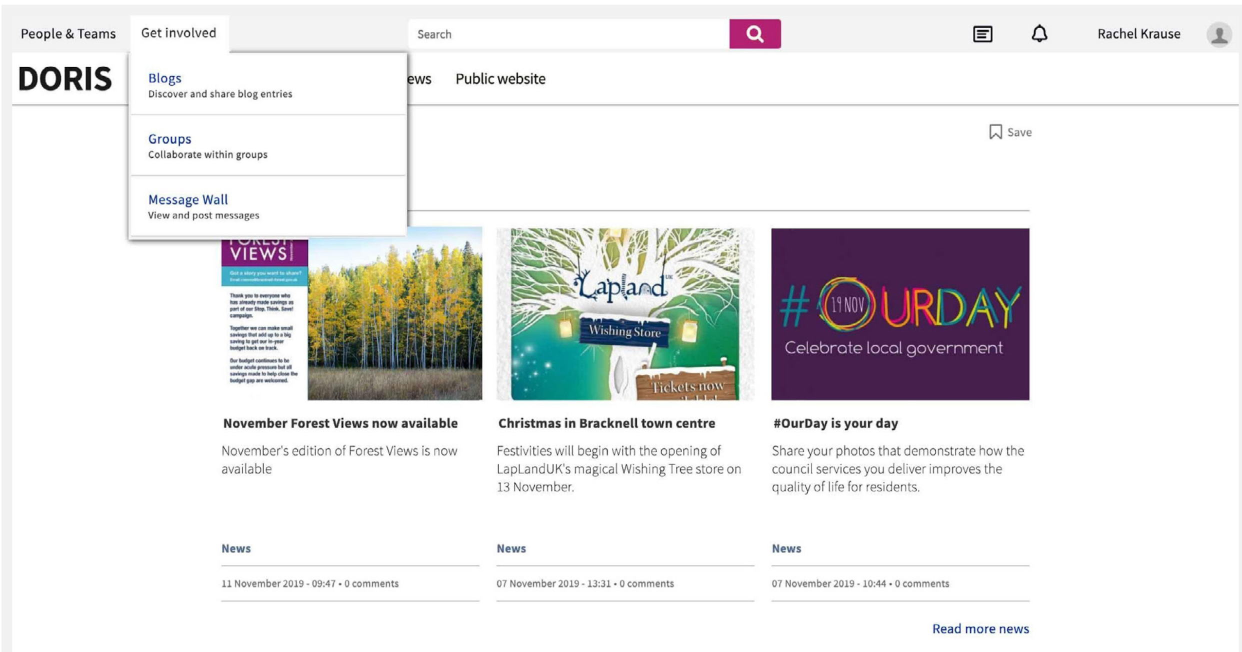
Dell did a good job of introducing the *My Communities* space and offered employees a holistic view of all the available communities on the section’s main landing page. Each community had a clear name, such as *Global Digital Marketing, Marketing Talent Development, and Legacy of Good*, and was accompanied by a short description that helped employees understand the purpose of the community and the type of content that would be shared there. This way, employees could make an informed decision about whether or not to engage further with the community.




*Dell did a great job providing employees with a one-stop view of all communities and social spaces on its intranet. Each social community had a clear name and short description, which helped employees decide which groups to engage with.*

## 48. Link to social spaces from the intranet's navigation and show feeds on the homepage and other relevant areas.

Employees may not know social channels exist, or if they do, they may not always know where to go to find them on the intranet. Because of this, it's best to place links to social channels in the intranet's main navigation, on the homepage, and key landing pages for departments and teams. When space allows, it's also acceptable to display social feeds from relevant communities, groups, or channels in these same areas. Surfacing what employees post about and discussing anywhere that's relevant will help create awareness for the social channels, allowing other employees to discover and engage with them.




*Bracknell Forest Council's intranet had a link to all its social channels in the main navigation. The* Get Involved *dropdown menu displayed links to blogs, interest groups, and a message wall on the intranet.*

Burns & McDonnell's intranet lacked obvious ways for employees to discover new communities of interest. Employees who weren't active on Yammer belonged to one or two groups but didn't seem sure how those groups were assigned. Links to the social channels were included in the *My Stuff* category in the main navigation, specifically within a subcategory for *My Communities*. However, users still struggled to find communities of interest on the intranet, as there was no way to browse a list of all active Yammer communities so employees could find ones they might be interested in.

One user mentioned that he was interested in fitness and enjoyed reading social content on the topic. When we asked him to find a fitness community on the intranet, he had no idea how to do that. He went to the *HR Wellness* section, thinking he might see a social feed there, but didn't find any contextually relevant social content. He said, "It would be nice if you could find an entire list of wellness or fitness-related communities. Maybe that exists, but to find a new one, I don't even know how you would do that."

A better approach would have been for Burns & McDonnell to place social feeds and links to relevant communities in places such as the *HR Wellness* section. Adding a link within the *My Communities* mega menu to *Manage Communities* or *Browse All Communities* would also help employees discover more communities of interest from a list of all possible communities.

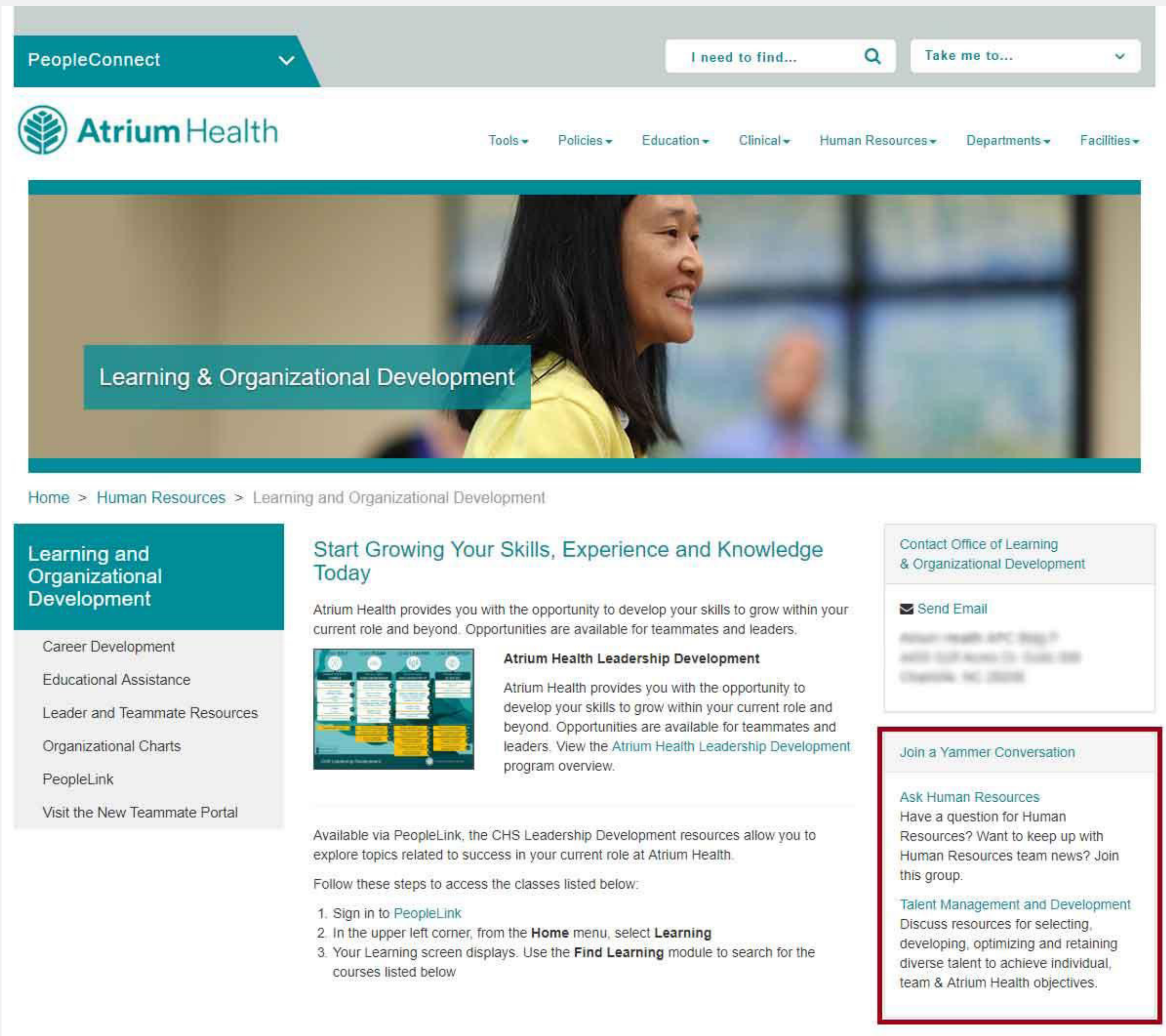
In other tasks at Burns & McDonnell, users struggled to find a reason and way to access Yammer, the social tool powering *My Communities* on its intranet. Because Yammer wasn't integrated or visible within contextually relevant and community sections, it was easy for users to ignore the platform. One user said, "If the information is related to Environmental Services, why do they have to bring in Yammer? Why isn't that just on the Environmental Services page?" Another employee said:

> "Yammer could be used for sharing information, but it seems like a lot of the stuff you'd find here on the intranet, you could find elsewhere. This would be on the homepage, and you could read it without needing to go through another website and dialog boxes; it would just be on the home screen."

Promote active communities in Yammer on the intranet's homepage and on team, department, and group pages. For example, Burns & McDonnell's *T&D Innovation page* promoted and linked to its own community (which was powered by Yammer) using a tile on its main landing page. Following the same approach for other active community pages would help improve the company's social engagement strategy further.

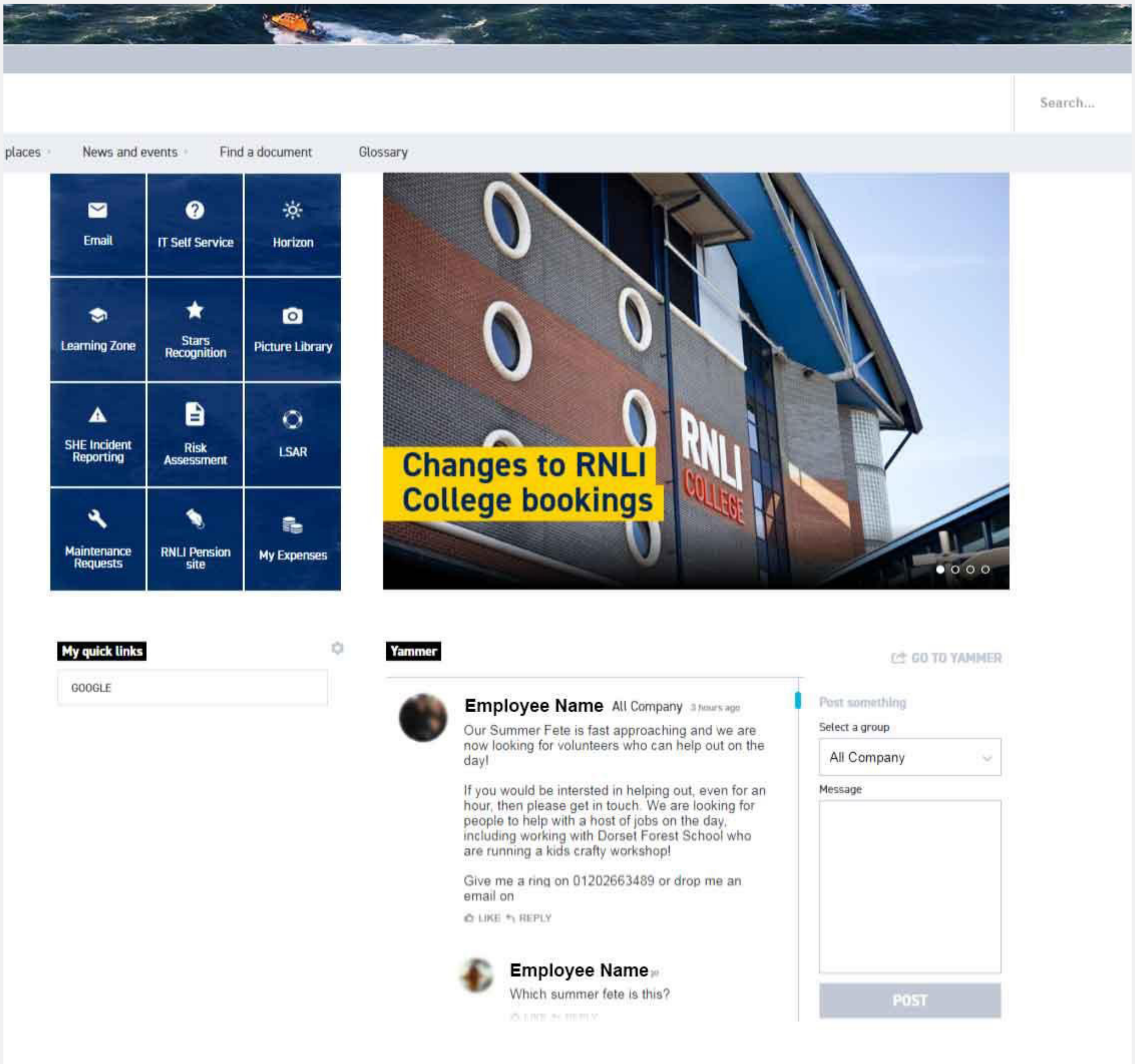

*Burns & McDonnell's* T&D Innovation *team promoted its active Yammer community from its landing page, which was favorable.*



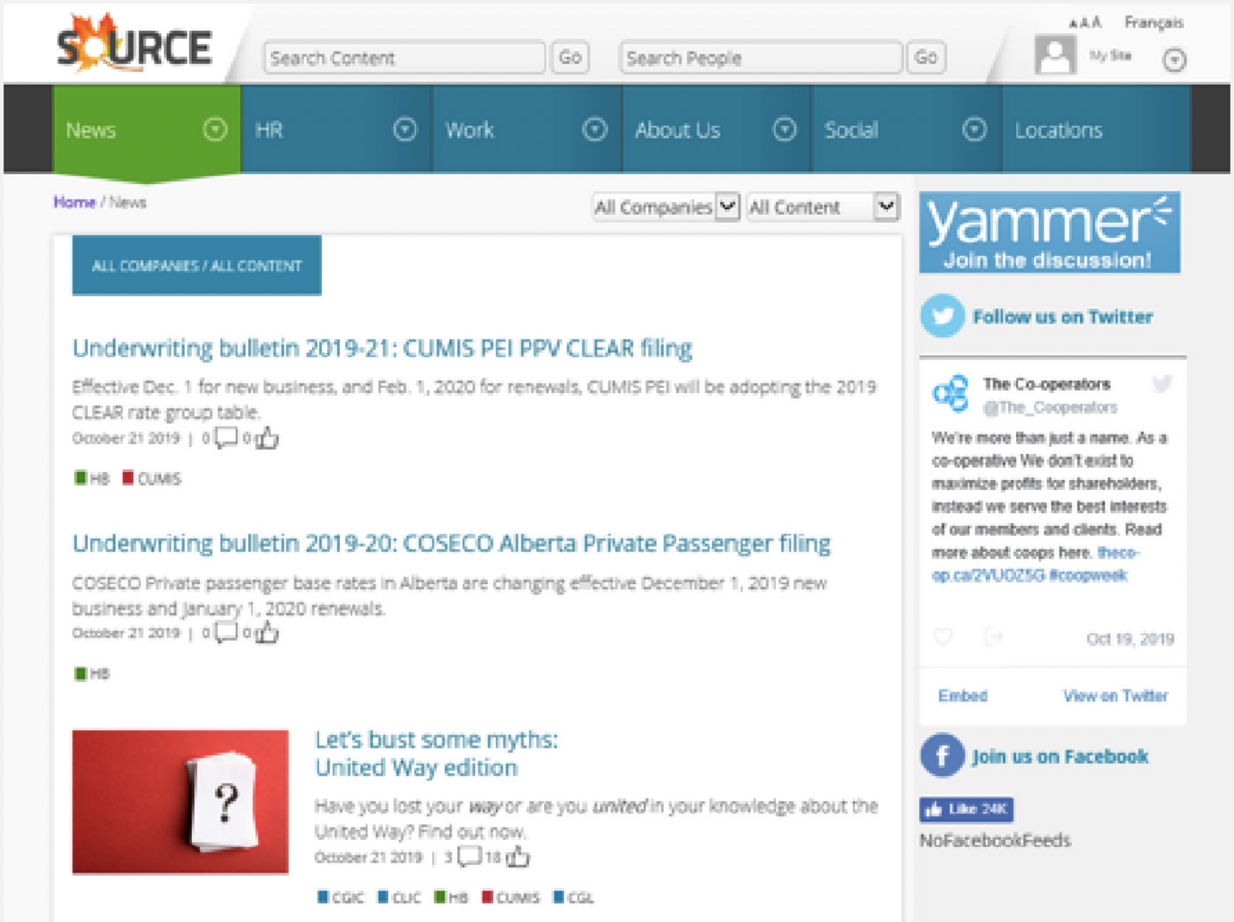

*In another good example, Atrium Health linked to relevant social channels powered by Yammer on its intranet's department and team landing page. These included the* Ask Human Resources *and* Talent Management and Development *channels in the* Learning & Organizational Development *section.*

The team at the Royal National Lifeboat Institution found having a Yammer feed on the intranet's homepage helpful. Employees could stay updated on what their colleagues were saying and join the conversation without leaving the page. The feed was prominent and allowed users to see content or share a post to any group on the intranet. The intranet team described how they had used Yammer since 2013 and saw mixed usage over the years. One team member said, "Some people are really active, but others are not, but the overall perception is that it is well used. There are different groups for classifieds, a UX club, and more.




*The Royal National Lifeboat Institution included a prominent Yammer feed on its intranet homepage. Employees could see social content that was recently posted or post something themselves in any of the groups available.*

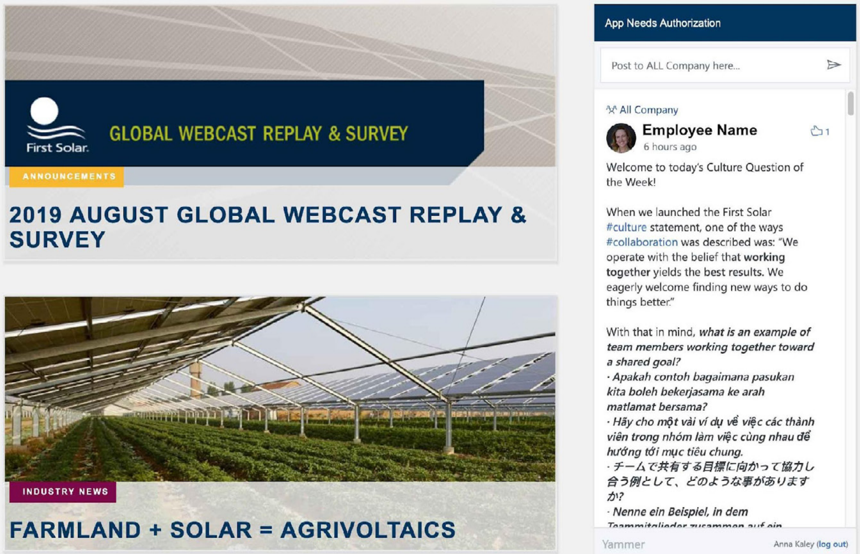
The Co-operators used a Yammer feed on its homepage, department pages, and in the *News* section of the intranet. One of the intranet team members said, “A lot of employees use Yammer, particularly from the *Join the Discussion* banners posted across the intranet. A few subsites also have a Yammer page embedded for that group’s feed.”




*The Co-operators included a link to join the discussion on Yammer, a Twitter feed, and links to* Follow *and* Like *the company's pages on Facebook and Twitter in the intranet's* News *section.*

First Solar also had a Yammer feed that pulled content onto the intranet's homepage. One of the team leads said:

> "We have lots of integration with Yammer and our created content. We have different Yammer groups tied into department pages. If you post something in Yammer under the department's site, it will display on the department's pages. It's a continuous improvement with Yammer; as long as it's not broken, the post displays, and it shows up here; as you see these cards, they're pulling in from Yammer."




*First Solar included an* All Company *Yammer feed on its intranet's homepage.*

At the time of our study at First Solar, Yammer adoption was up 30% among knowledge workers, and the team had set a goal to increase adoption to 50% that year. The organization had offices in the US and Asia, and intranet team members discussed how it was interesting to see the different engagement styles and adoption metrics by region. One team member said, "In the US, we are more aware of the persona that we are putting out there. It seems that our colleagues in Asia communicate more openly via Yammer, specifically in Malaysia and Vietnam."

### Employees lost interest in outdated social and community content.

**User Behaviors**

Outdated content in Yammer groups disincentivized participation. When the first post employees saw in Yammer was old, it created the impression that the community was inactive and the content was stale.

After seeing old content, employees did not typically want to read more or participate in the discussions. For one user, the most recent post in his only group was from December 2017; for another, the most recent post was from January 2019. (We conducted our study at the organization later in 2019).

Both users complained that the posts were too old, so neither had any interest in spending more time on the social channels.

## 49. Allow employees to opt in or out of emails and notifications related to social and community content.

There will be employees in your organization who aren't interested in engaging with social channels on the intranet, but many are likely to show interest. Another way to help drive engagement is to allow employees to follow social channels or communities of interest. This way, employees will be notified through the intranet and sometimes even through email when new content is posted or there are new comments or *Likes* associated with posts they've interacted with in the past. However, always give employees a way to manage or opt out of the notifications and emails they receive as it relates to social content on the intranet.

At First Solar, interaction and interest in Yammer were low during our usability testing sessions. Though some teams engaged on the platform, most employees didn't see it as a productive communication tool and, instead, saw it as a distraction. One user said:

> "I don't like Yammer. When you've been mentioned, then I get an email. I usually just look at the email and wonder if I'm supposed to go and reply to this? I don't want something else to manage. I don't need to see churn in my inbox. Are there settings I don't know about to filter the emails? I have IM, email, text, and WhatsApp for international people. I don't need another thing to monitor."

Tell employees how they should use Yammer, explain its purpose, and set expectations for interaction. Must they always reply? Can they turn off email notifications? Helping employees understand these details will contribute to them feeling like they are more in control and will also help boost their perception of the social channels.

Users at Eyeo weren't clear about what watching a community space meant and were discouraged from following them when they realized they would receive email notifications. Employees had to click on a *Watch* button to follow a social community. After doing this, a small popup appeared and explained what watching a space meant. This *Watch* button was placed right next to a *Save for later* button, so employees questioned the difference between the two. *Watch* meant that users would receive email updates about the page, whereas *Save for later* saved a link to the page in the user's saved content space on the intranet. One user said, "I'm not sure if I watch all content, if that means everything in animal lovers or anything in recreational communities?"

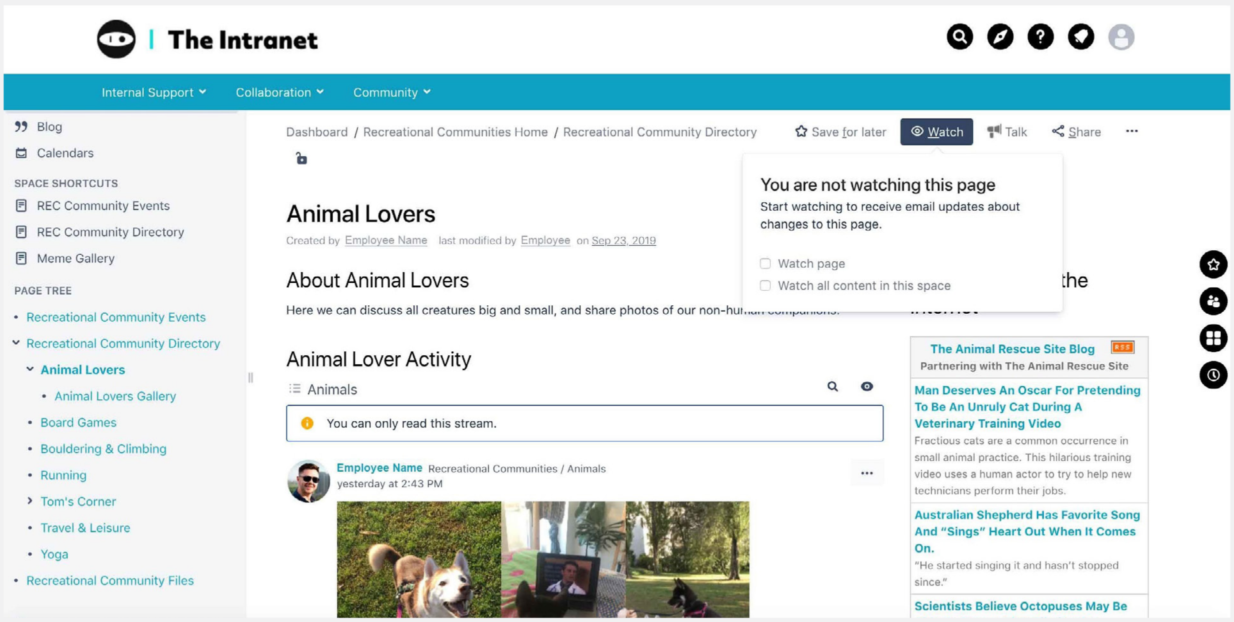
When we asked users to subscribe to a social community, no one completed the task because they did not want to receive email notifications. One user said:

> "I wonder if there is a way to subscribe to a community without getting emails . . . I'm probably going to click on *Watch* and then hope that I can unsubscribe and hope that I can still watch it. But if the notifications get to my email box, that can be very distracting. I don't want that distraction . . . I don't want emails when someone is interacting at all hours of the day. I want to get a notification [on the

> intranet] and choose when I interact instead of someone else choosing for me."

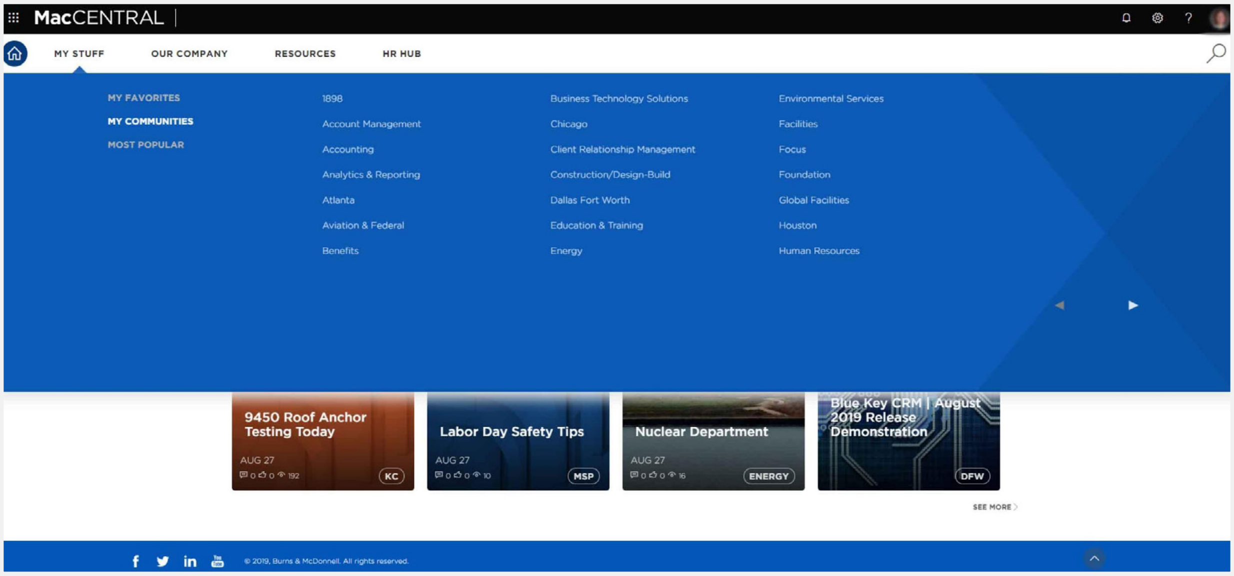
Another user said, "I'm not really sure if I want to receive emails because it's a personal thing."

Allow users to be notified on the intranet of changes to communities they follow without them having to receive email updates. Our previous research shows that users don't like receiving workplace notification emails and switch off email updates altogether, which means they might miss out on useful content updates if there aren't also notifications on the intranet. Eyeo should also consider exposing what *Watch* or *Save for later* mean rather than expecting users to know they should click the icon to find out.




*Eyeo's intranet users weren't immediately clear about the difference between* Watch *and* Save for later. *When employees found out they might receive emails notifying them of content updates, they were less inclined to* Watch *the space and hoped they'd still receive notifications on the intranet but not in their inbox.*

At Burns & McDonnell, the ability to follow a community meant employees would receive updates and notifications when new content or comments were posted in the space. Also, when they followed a community, it also showed up in the *My Communities* dropdown from the *My Stuff* navigational category. It wasn't immediately apparent what users had to do to follow a community, as they had to click on a small star icon on the page instead of engaging with something clearer, such as a *Follow* button. Only one user we tested with knew how to follow a new community, and even after clicking on the star icon, he remained unsure whether or not he was following it. A description or explanation for why certain categories display in the *My Communities* menu would also add clarity.




*Burns & McDonnell included links to its interest communities in the main navigation, but it wasn't immediately clear to users why these communities were listed there or how to view others that were available.*

## 50. Enable comments on news articles, videos, blogs, social channels, and other appropriate intranet content.

Incorporating commenting functionality on intranet content introduces an excellent opportunity to turn any piece of content into something employees can discuss and socialize around. Content types where we commonly saw comments enabled during our studies included: news articles, blog posts, videos, and of course, content that was posted on social channels. When discussing commenting, one user spoke highly of the capability saying, “I do love the way that you can have ongoing engagements and conversations with people in context.”

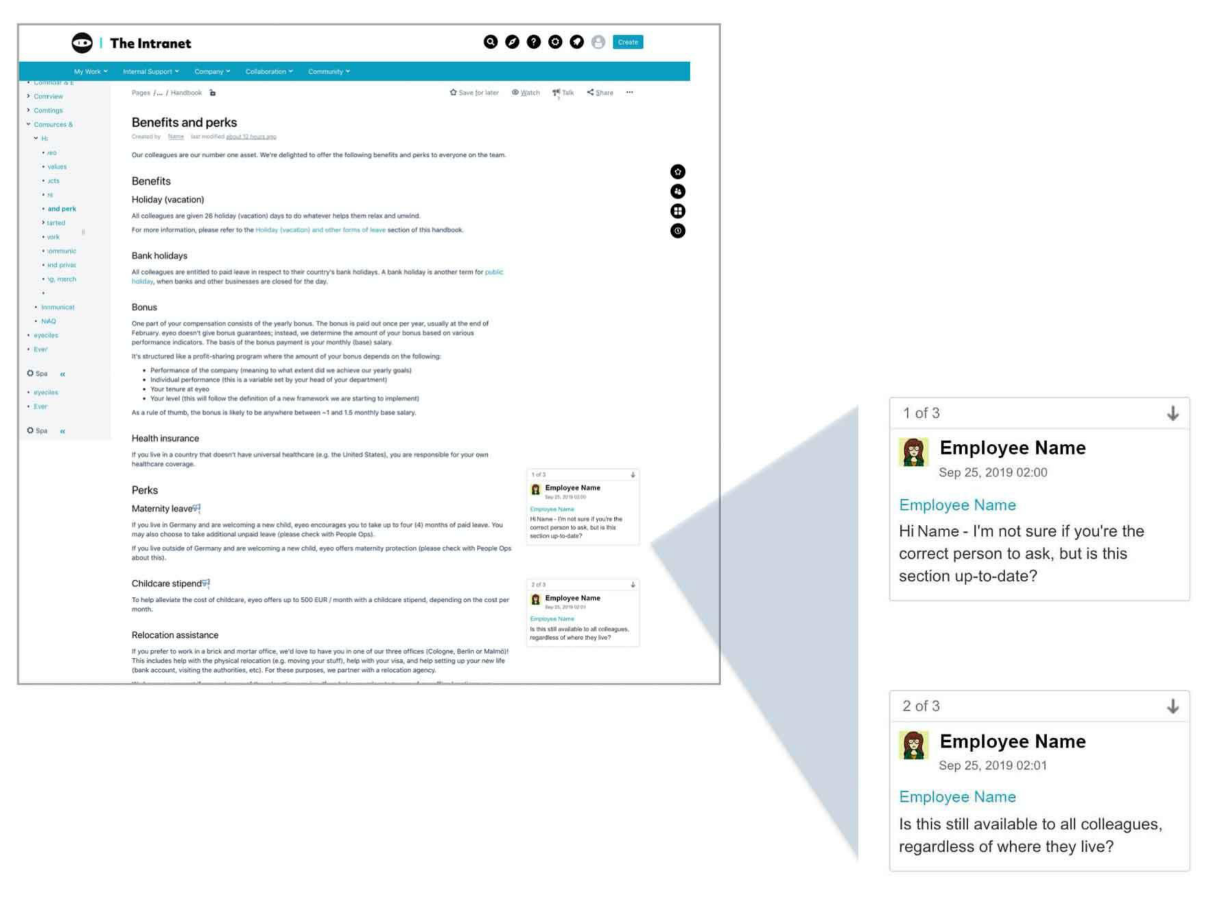
### Enable or disable comments on a per-post or per-page basis.

Process and Strategic Considerations

Sometimes, comments on a certain piece of content won't be appropriate for one reason or another. Maybe an announcement or a news article doesn't carry positive sentiment for the company or its employees, but they still need to know about it.

In these cases, strategically approach when to enable or disable comments on pieces of intranet content. Having the ability and wherewithal to do so will help to avoid any potential fallout from enabling comments on the wrong pieces of intranet content.

For example, on Eyeo's intranet, comments could be enabled or disabled on news articles and throughout team and department pages. In one example, an employee used a comment to ask if the content was up-to-date and if a particular benefit was still available to all employees regardless of where they live. Eyeo's intranet team could use comments like these as an opportunity to improve intranet content, in this case, to post the date when the content was last updated more prominently. Additionally, a comment like this shows the team that they need to add more answers and clarity to the section about the benefit, as many employees may share the same question or concern.




*At Eyeo, employees could comment on almost any intranet page. This helped the intranet team understand what content was missing from key pages.*

## Use questions, feedback, and ideas shared in the comments as content inspiration.

### Process and Strategic Considerations

Some companies viewed any negative comments posted on the intranet as something to learn from rather than something to hide. This attitude is, of course, highly dependent on the company and team's culture, but some intranet teams used the comments to keep an eye on employee morale and to understand better if there were problems, questions, or issues that should be addressed in the intranet's content.

The Scottish Government's corporate communications team handled content publishing but sometimes worked with subject matter experts across the organization to create intranet content. Amid this hybrid content-management model, employees could comment on most intranet content, such as news articles, task pages, and blog posts. Individuals could also see how many views and comments certain pieces of content had received.

Whenever a comment was posted, whoever originally published the page was notified. If the corporate communications team had not written the content, a person from the central intranet team had to let the subject matter experts within the organization know if a comment had been received on their content. In this way, the central intranet team acted as a conduit between the subject matter experts (who created the content) and the commenter to ensure adequate responses were posted when needed.

At the time of our research, the City of Calgary had just enabled commenting on its intranet. The team lead said:

> "Now that we have commenting capabilities, employees are interacting even more with each other. We have commenting and rating. In the past, people complained about not having it, so now people are starting to use it. We're depending on word of mouth for the uptick, and we're seeing it."

### Ensure someone is moderating comments.

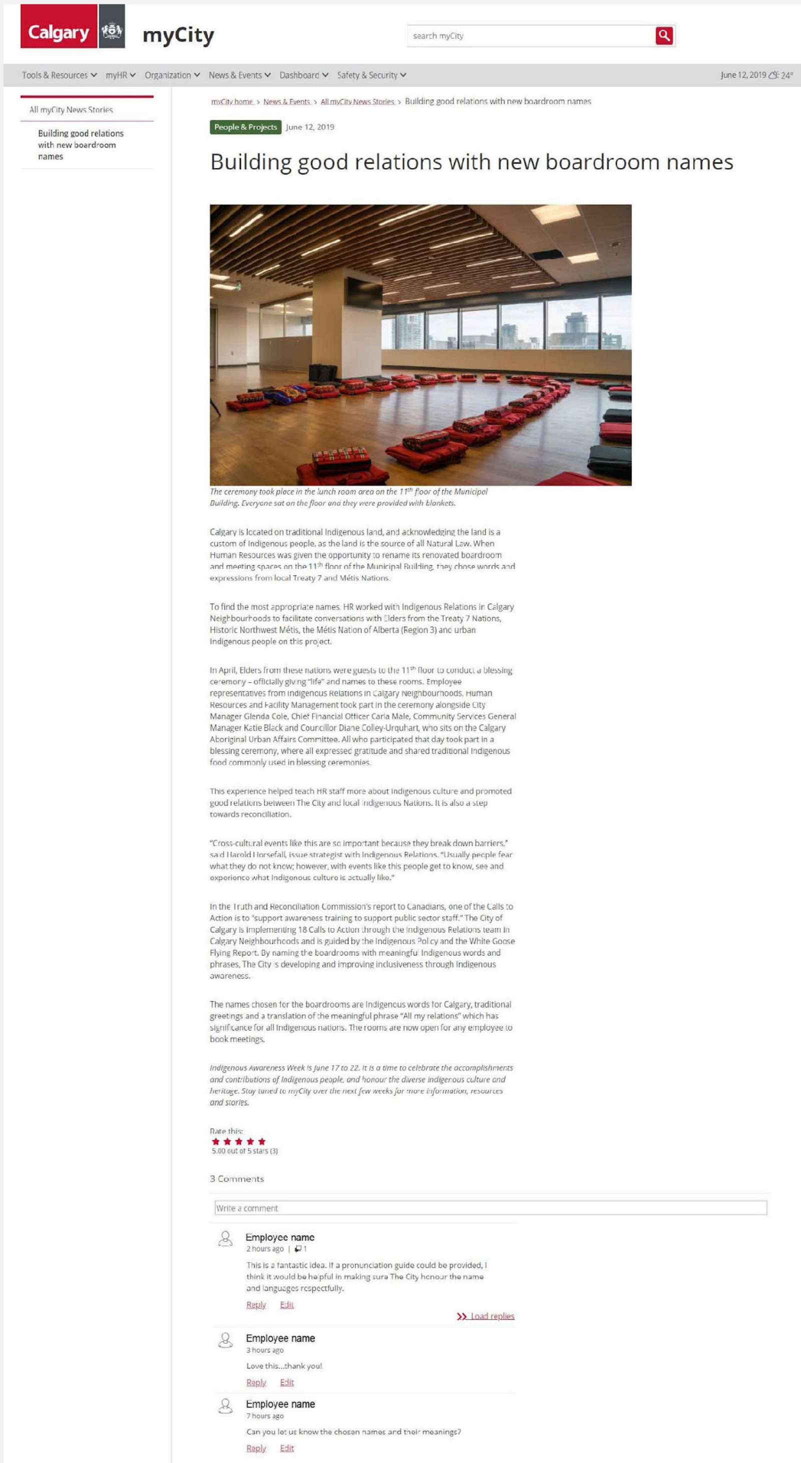
**Process and Strategic Considerations**

The City of Calgary's intranet team took an active approach to content moderation, watching for new comments as they came in so they could be approved and posted as quickly as possible.

The organization had 10 people who could review comments and post them and one person who was responsible for listening in social channels to do the same. An approver would receive a reminder email for any comments that weren't yet approved, and they could pass an inquiry on to a subject matter expert for them to respond to the comment.

For comments that didn't meet the organization's approval standards, approvers flagged the response or followed up in a different way. One of the comment approvers said,

> "You can see who the commenter was, and this helps us respond individually if it's something they need to hear directly about why their comment wasn't approved or if we need to follow up individually with them."

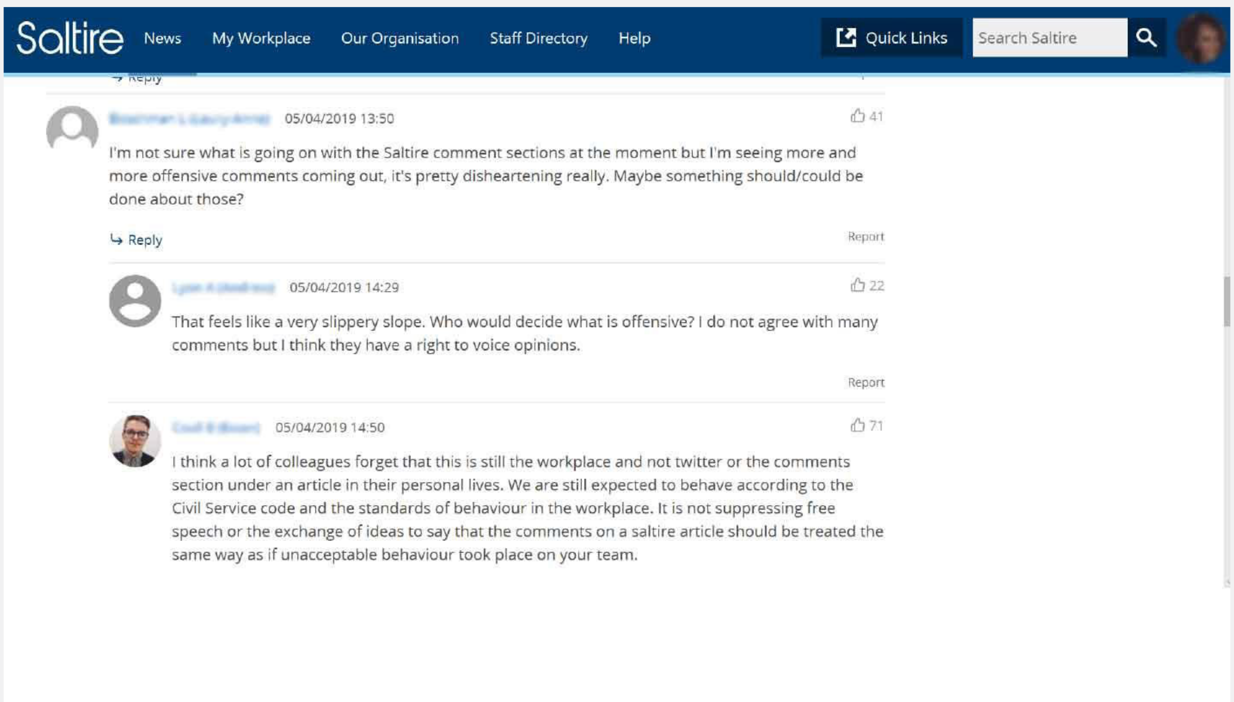



*The City of Calgary's intranet represented a great example of effective comment moderation and using comments to inspire content improvements. This piece could be further improved by adding subheadings to make this content appear less like a wall of text and make it easier to skim and scan. Nonetheless, the comments were good.*

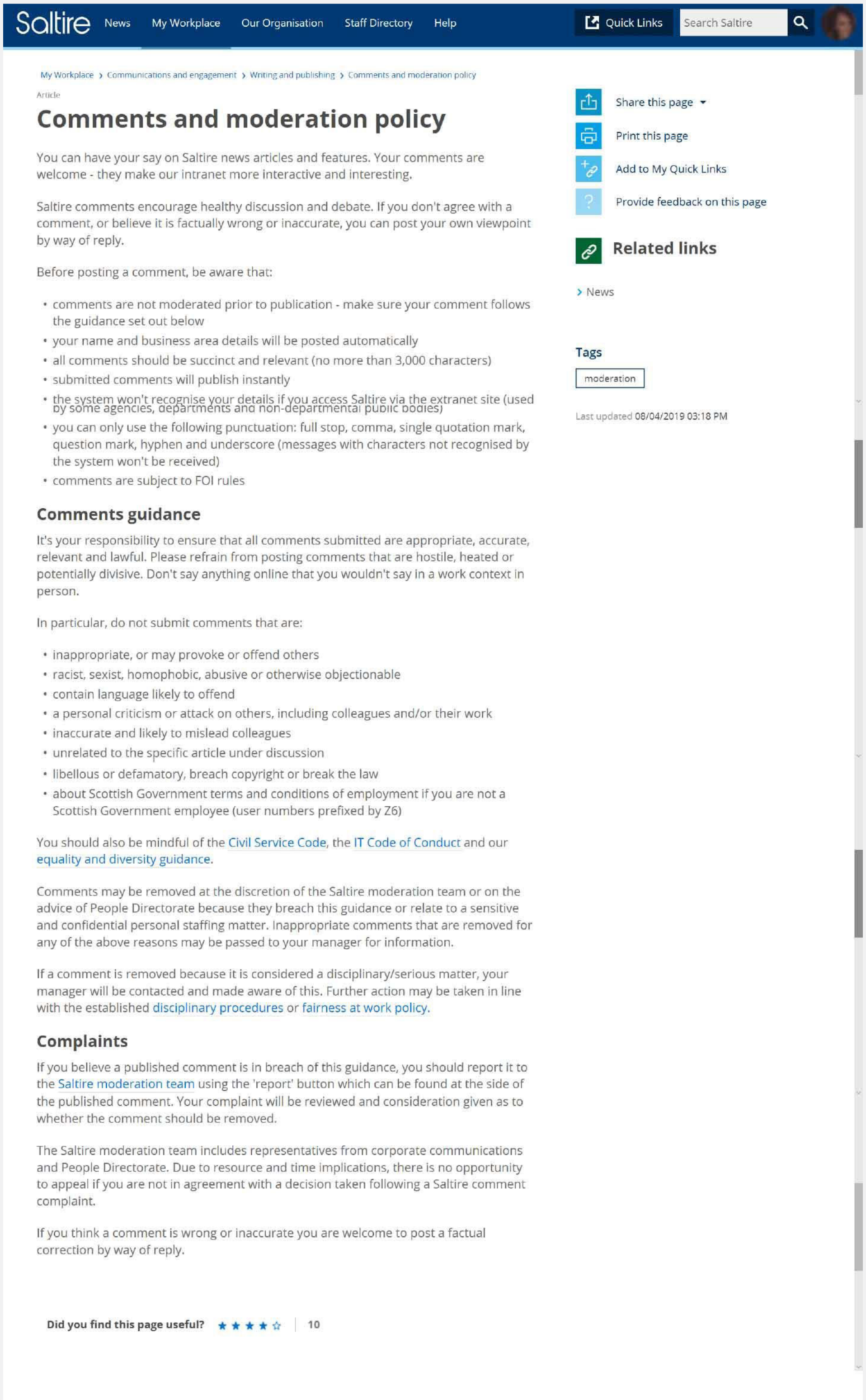
## 51. Post standards and guidelines for commenting close to where employees comment.

The teams we worked with described initial apprehensions about enabling commenting on the intranet. Management feared that allowing comments would lead to negative or inappropriate discussions; however, in practice, this rarely happened. We only observed one instance of potentially offensive language in a commenting section — at the Scotting Government — and ironically, the issue was brought up in the commenting section itself, despite the organization's thorough commenting policy.

Perhaps including a prominent summary of the commenting policy near where employees post comments would help diffuse the situation.




*Scottish Government employees expressed concern (through comments) that their peers were posting offensive comments on the intranet.*



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My Workplace › Communications and engagement › Writing and publishing › Comments and moderation policy

Article

# Comments and moderation policy

You can have your say on Saltire news articles and features. Your comments are welcome - they make our intranet more interactive and interesting.

Saltire comments encourage healthy discussion and debate. If you don't agree with a comment, or believe it is factually wrong or inaccurate, you can post your own viewpoint by way of reply.

Before posting a comment, be aware that:

- comments are not moderated prior to publication - make sure your comment follows the guidance set out below
- your name and business area details will be posted automatically
- all comments should be succinct and relevant (no more than 3,000 characters)
- submitted comments will publish instantly
- the system won't recognise your details if you access Saltire via the extranet site (used by some agencies, departments and non-departmental public bodies)
- you can only use the following punctuation: full stop, comma, single quotation mark, question mark, hyphen and underscore (messages with characters not recognised by the system won't be received)
- comments are subject to FOI rules

## Comments guidance

It's your responsibility to ensure that all comments submitted are appropriate, accurate, relevant and lawful. Please refrain from posting comments that are hostile, heated or potentially divisive. Don't say anything online that you wouldn't say in a work context in person.

In particular, do not submit comments that are:

- inappropriate, or may provoke or offend others
- racist, sexist, homophobic, abusive or otherwise objectionable
- contain language likely to offend
- a personal criticism or attack on others, including colleagues and/or their work
- inaccurate and likely to mislead colleagues
- unrelated to the specific article under discussion
- libellous or defamatory, breach copyright or break the law
- about Scottish Government terms and conditions of employment if you are not a Scottish Government employee (user numbers prefixed by Z6)

You should also be mindful of the Civil Service Code, the IT Code of Conduct and our equality and diversity guidance.

Comments may be removed at the discretion of the Saltire moderation team or on the advice of People Directorate because they breach this guidance or relate to a sensitive and confidential personal staffing matter. Inappropriate comments that are removed for any of the above reasons may be passed to your manager for information.

If a comment is removed because it is considered a disciplinary/serious matter, your manager will be contacted and made aware of this. Further action may be taken in line with the established disciplinary procedures or fairness at work policy.

## Complaints

If you believe a published comment is in breach of this guidance, you should report it to the Saltire moderation team using the 'report' button which can be found at the side of the published comment. Your complaint will be reviewed and consideration given as to whether the comment should be removed.

The Saltire moderation team includes representatives from corporate communications and People Directorate. Due to resource and time implications, there is no opportunity to appeal if you are not in agreement with a decision taken following a Saltire comment complaint.

If you think a comment is wrong or inaccurate you are welcome to post a factual correction by way of reply.

Did you find this page useful? ★★★★☆ 10

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Print this page
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moderation

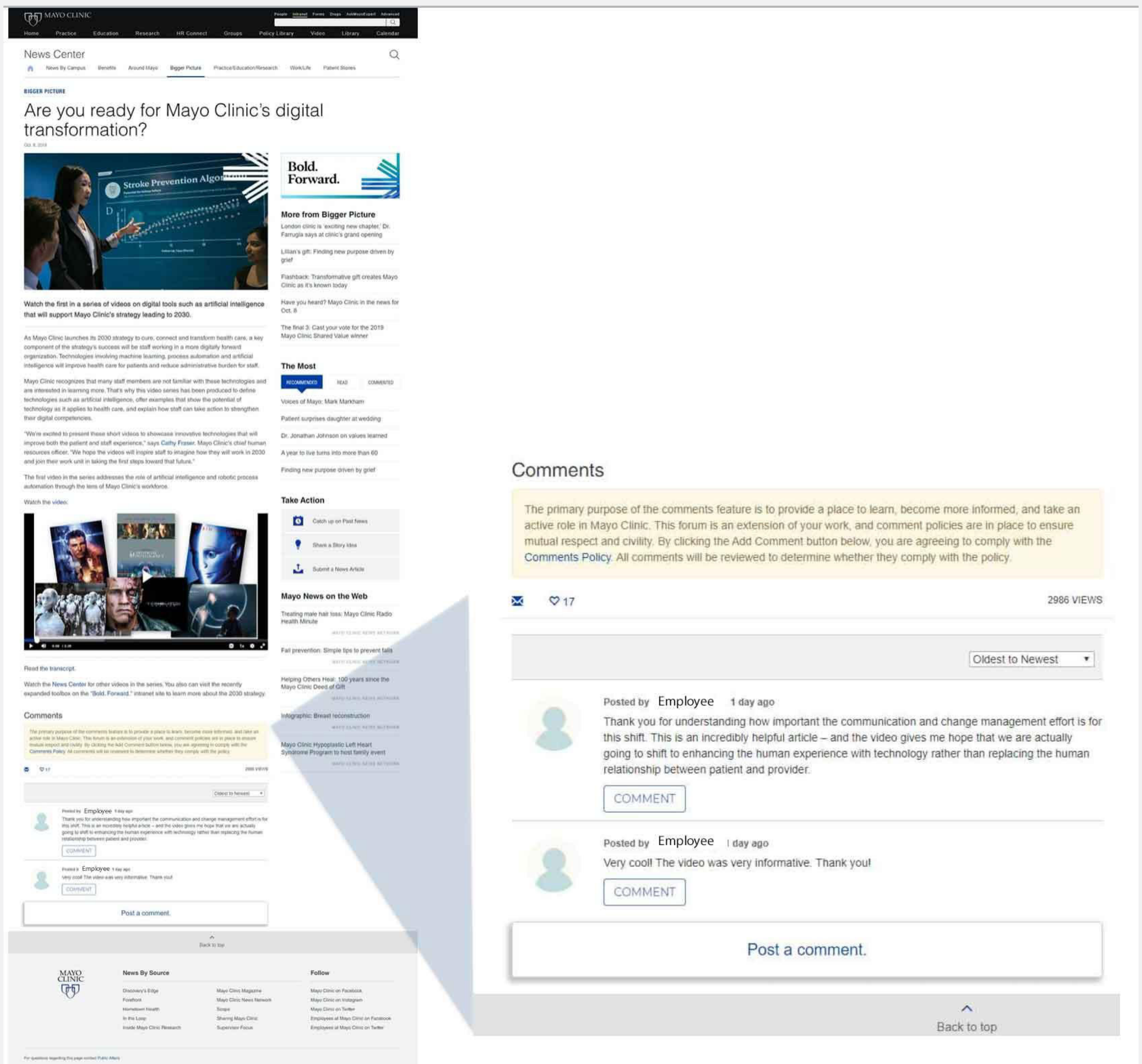
Last updated 08/04/2019 03:18 PM

*Though the Scottish Government had a lengthy commenting policy on its intranet, posting a summary of the policy nearby where employees comment, with a link to the full policy, would have helped.*

There are a few key differences between when employees post on an intranet vs. in a public forum. Most employees have a sense of responsibility for their behavior at work that they wouldn't necessarily have on a mainstream social media channel or website. Also, companies have the benefit of being able to establish clear rules, standards, and guidelines about what types of discussions and comments are appropriate, to dissuade irresponsible behavior. It's best to post these tips nearby where employees comment to serve as a timely reminder before they do.

For example, the Mayo Clinic posted a prominent set of comments standards nearby its comments section. The statement outlined the purpose of comments for employees and provided a link to view the full policy. It was helpful to post this here, where users could understand what appropriate commenting looked like and how comments may impact their professional standing within the organization. This transparency, clarity, and proximity were favorable. The content on the page read:

> The primary purpose of the comments feature is to provide a place to learn, become more informed, and take an active role in Mayo Clinic. This forum is an extension of your work and comments policies are in place to ensure mutual respect and civility. By clicking the Add Comment button below, you are agreeing to comply with the Comments Policy. All comments will be reviewed to determine whether they comply with the policy.



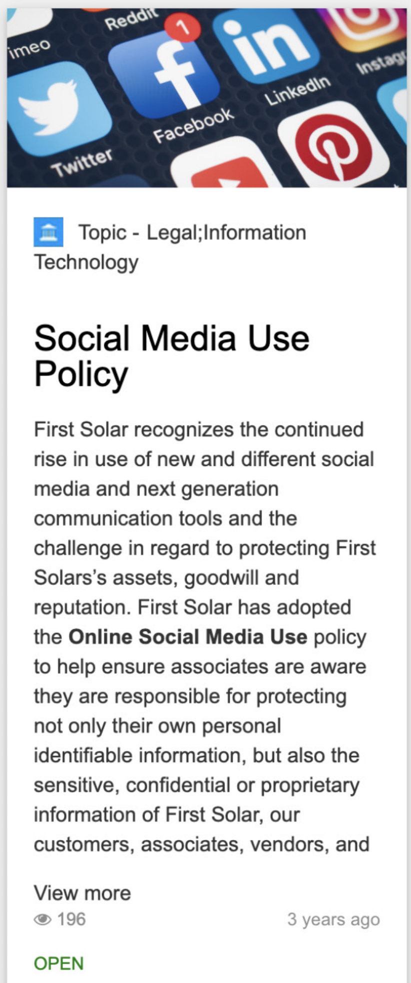

*The Mayo Clinic did a good job with posting its comments policy alongside anywhere employees could post comments to content on the intranet.*

## 52. Encourage employees to engage on mainstream social channels, in addition to on the intranet.

In addition to the social channels on the intranet, employees may also be interested in engaging with one another on mainstream social networks. For example, the Royal National Lifeboat Institution had a closed Facebook page that its Lifeguards used. Employees perceived this social channel as a more comfortable place to share social content. At the time of our study, there were approximately 4,600 users in the group. Internal communications organized and managed the group to maintain order and professionalism. The team also granted volunteers access to the group, and the intranet's homepage had social feeds from both the Facebook group and the organization's Twitter account.

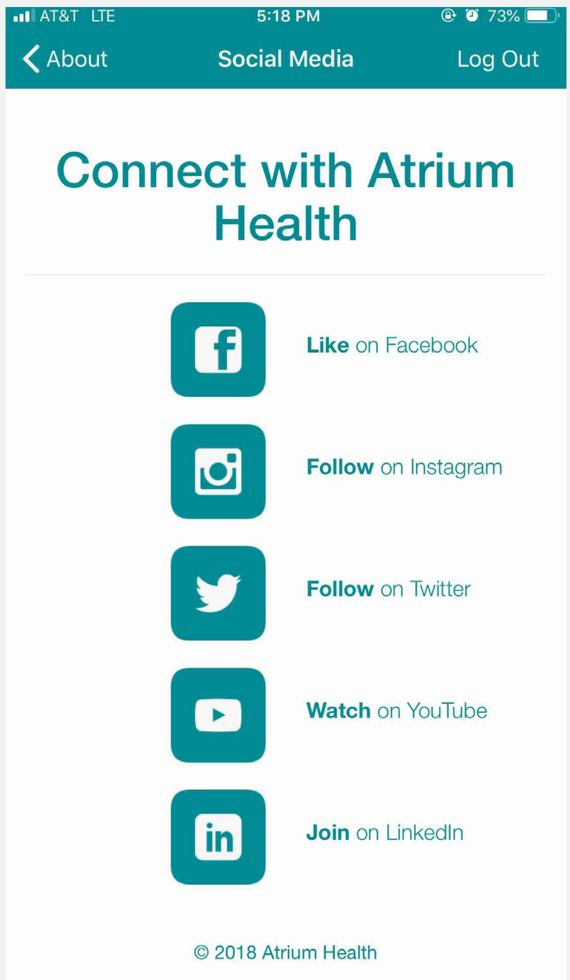
Despite familiarity with these mainstream platforms, employees sometimes need coaching and standards to help them remember what's appropriate to discuss in work-related groups outside the intranet. Including these standards can help employees understand how to use the external channels and still maintain their professional reputation and the organization's.

For example, First Solar had a *Social Media Use Policy* on its intranet. Recognizing that employees were already using mainstream social media channels to communicate with one another, the standards ensured that associates were aware of and responsible for protecting their information and First Solar's while using these public forums.




*First Solar posted its* Social Media Use Policy *on the intranet so employees could easily find it and understand any implications of communicating on mainstream social channels.*

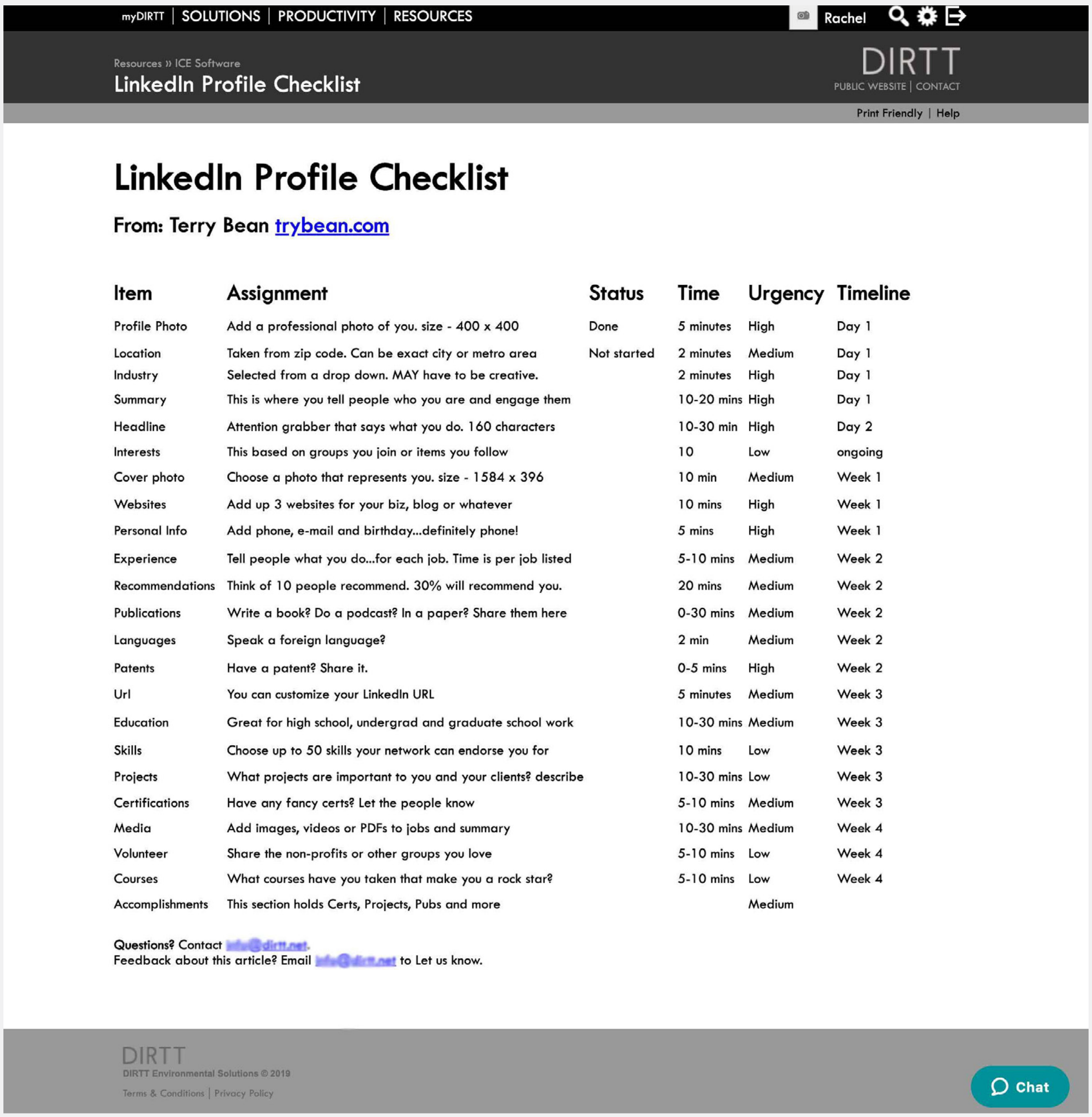
Atrium Health had a version of its intranet that was a mobile application. From this channel, employees could do many of the same top tasks they could on the desktop version of the intranet. One specific area of the mobile app encouraged employees to engage with Atrium Health on mainstream social media channels, including Facebook, Instagram, Twitter, YouTube, and LinkedIn. This was favorable as it gave employees additional channels in which to engage with one another as well as with the organization. Seeing comments on mainstream social channels from end users can inspire company employees to create content for the intranet about specific topics or discussions, feel proud of where they work, or help them empathize and understand how they can use their roles to improve the end-user experience.




*Employees were encouraged to follow the company on mainstream social networks on the mobile app version of Atrium Health's intranet.*

At DIRTT, employees were encouraged to complete their LinkedIn profiles, as the sales-focused nature of their jobs necessitated it. This way, prospective clients and new leads could get to know their sales representatives. Also, because this was an essential channel for employees to engage with, a detailed to-do list appeared on the intranet to help employees understand the necessary steps to complete their LinkedIn profile.

Acknowledging that sales representatives were often busy with other work-related tasks and that updating their social media profiles wasn't a top priority, each line item in the to-do list included a status employees could record, the time the task would take, its level of urgency, and the best time to complete the activity after initially creating a LinkedIn profile, all of which were favorable.



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Resources » ICE Software

LinkedIn Profile Checklist

DIRTT

PUBLIC WEBSITE | CONTACT

Print Friendly | Help

# LinkedIn Profile Checklist

**From: Terry Bean trybean.com**

| Item | Assignment | Status | Time | Urgency | Timeline |
|---|---|---|---|---|---|
| Profile Photo | Add a professional photo of you. size - 400 x 400 | Done | 5 minutes | High | Day 1 |
| Location | Taken from zip code. Can be exact city or metro area | Not started | 2 minutes | Medium | Day 1 |
| Industry | Selected from a drop down. MAY have to be creative. | | 2 minutes | High | Day 1 |
| Summary | This is where you tell people who you are and engage them | | 10-20 mins | High | Day 1 |
| Headline | Attention grabber that says what you do. 160 characters | | 10-30 min | High | Day 2 |
| Interests | This based on groups you join or items you follow | | 10 | Low | ongoing |
| Cover photo | Choose a photo that represents you. size - 1584 x 396 | | 10 min | Medium | Week 1 |
| Websites | Add up 3 websites for your biz, blog or whatever | | 10 mins | High | Week 1 |
| Personal Info | Add phone, e-mail and birthday...definitely phone! | | 5 mins | High | Week 1 |
| Experience | Tell people what you do...for each job. Time is per job listed | | 5-10 mins | Medium | Week 2 |
| Recommendations | Think of 10 people recommend. 30% will recommend you. | | 20 mins | Medium | Week 2 |
| Publications | Write a book? Do a podcast? In a paper? Share them here | | 0-30 mins | Medium | Week 2 |
| Languages | Speak a foreign language? | | 2 min | Medium | Week 2 |
| Patents | Have a patent? Share it. | | 0-5 mins | High | Week 2 |
| Url | You can customize your LinkedIn URL | | 5 minutes | Medium | Week 3 |
| Education | Great for high school, undergrad and graduate school work | | 10-30 mins | Medium | Week 3 |
| Skills | Choose up to 50 skills your network can endorse you for | | 10 mins | Low | Week 3 |
| Projects | What projects are important to you and your clients? describe | | 10-30 mins | Low | Week 3 |
| Certifications | Have any fancy certs? Let the people know | | 5-10 mins | Medium | Week 3 |
| Media | Add images, videos or PDFs to jobs and summary | | 10-30 mins | Medium | Week 4 |
| Volunteer | Share the non-profits or other groups you love | | 5-10 mins | Low | Week 4 |
| Courses | What courses have you taken that make you a rock star? | | 5-10 mins | Low | Week 4 |
| Accomplishments | This section holds Certs, Projects, Pubs and more | | | Medium | |

**Questions?** Contact [illegible].
Feedback about this article? Email [illegible] to Let us know.

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Chat

*DIRTT included a to-do list on its intranet to help employees fill out their LinkedIn profiles.*

# FORMS AND POLICIES

## 53. Give forms and policies dedicated areas and cross-display them where they're contextually relevant.

Organize forms and policies in respective central areas and cross-link to them from appropriate areas of the intranet rather than listing them solely by the responsible department. Employees shouldn't need to know the organizational structure and departmental responsibilities to find the form they need.

**Employees struggled to find forms or policies when they were organized by the team that owned them.**

User Behaviors

Some policies on the intranets we studied were organized by the internal teams who owned them. This approach may be convenient for the internal teams but is not helpful for policy end users.

At Atrium Health, one participant who failed to figure out where to find a policy for how to clean children's toys said:

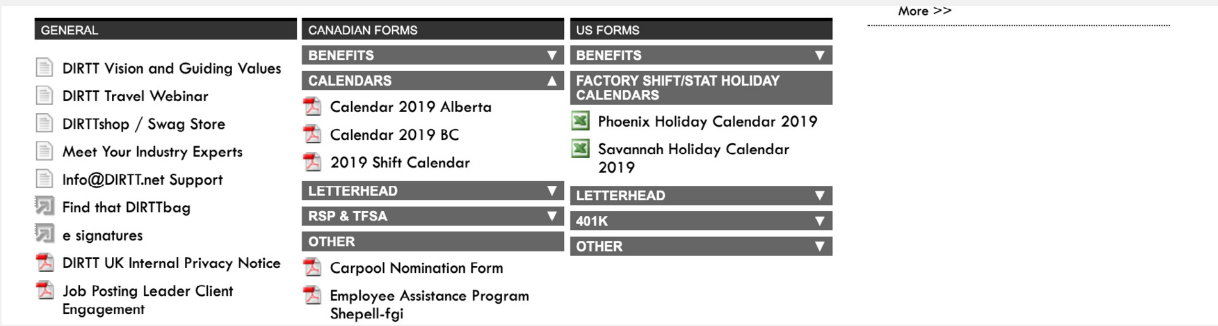
> "I would've given up by now and called someone. [. . .] Environmental Care? Infection Prevention? Environmental Services? I guess the problem is not knowing who's responsible for that. Who owns that policy?"

Users shouldn't have to know who owns a policy to predict where it is stored. Organize policies by topics, not by departments, and give employees options to find them contextually, from one central place, or through search.

For example, when we asked what she would change about the intranet, one field study participant at DIRRT said, "If there was one place that had all the forms, that would be helpful. There are forms in each of the sections, and sometimes the sections are not what I would consider them to be under."

At the Co-operators, employees had different expectations for where to find documents, forms, and policies. One participant said, "Sometimes there are multiple versions of documents, policies, and forms. Personally, I like to see them on the department's page."

This is why it's important to have forms and policies live in a central space and link to them where they're contextually relevant.



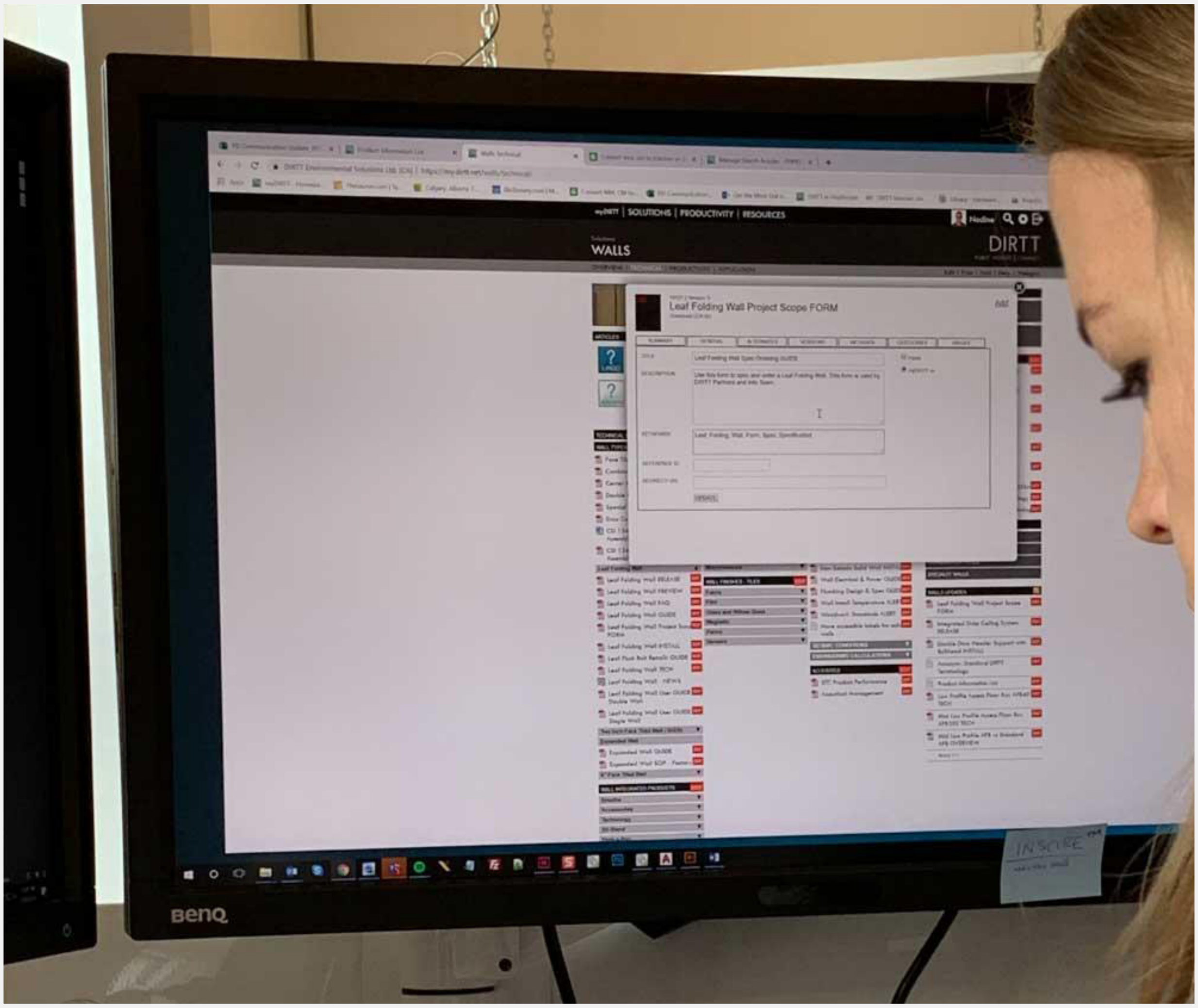

*DIRTT included links to forms and policies within specific department pages on its intranet, which was favorable. Still, when trying to accomplish certain tasks, some users felt it would have been easier to find from one central place instead — one space for forms and another for policies.*

## Consider the needs of form or policy owners and also users in your content strategy.

**Process and Strategic Considerations**

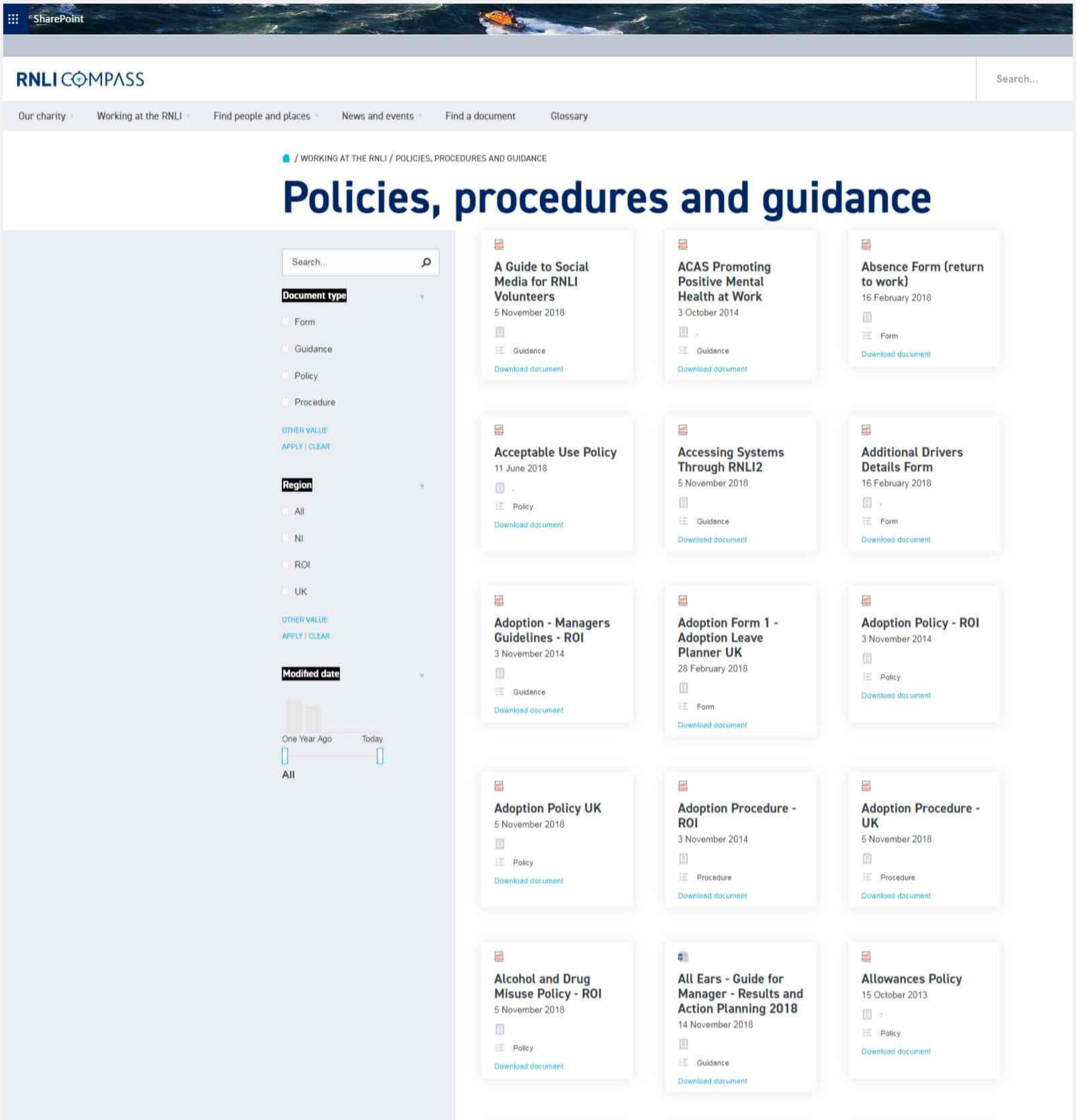
When deciding on a form or policy organization solution, user needs should be considered the highest priority.

Ideally, the form or policy solution will be as easy-to-use for policy owners as for users; however, users often outnumber owners. Even minor UX improvements to make forms and policies easier to find and use could result in significant efficiency gains.

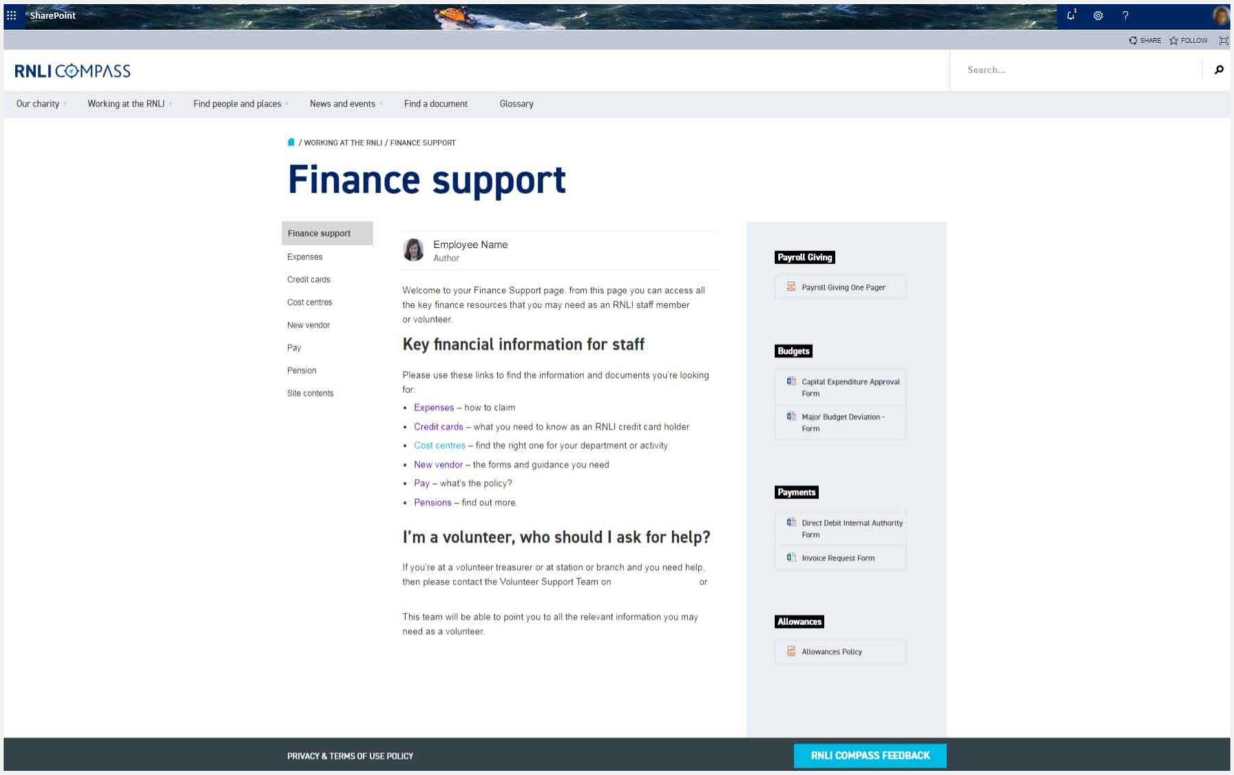



*One positive factor related to DIRTT's intranet form was that they were all web-based and easy for employees to fill out.*

The Royal National Lifeboat Institution had a dedicated section for *Policies, procedures, and guidance* on its intranet. The documents were listed in alphabetical order, and employees could search and filter within this space to find forms, guidance documents, policies, or procedures, which was favorable. Additionally, links to these content types were displayed contextually in intranet areas, such as *Finance Support* and other appropriate department, team, or group spaces. One employee said of the approach, "I like how the forms, documents, and policies on the intranet are listed in alphabetical order, from A–Z, so if you know the topic it's based on, related to, or what your document is called, you can filter."




*The Royal National Lifeboat Institution had forms, guidance documents, policies, and procedures on its intranet in one central area. Employees appreciated that these documents were listed in alphabetical order and that they could filter and search using specific criteria and keywords.*




*Across the Royal National Lifeboat Institution's intranet, forms appeared where they were contextually relevant, such as on this* Finance support *page, which showed related policies and procedures.*

### Ensure forms and policies appear in search and live in a searchable space.

**Process and Strategic Considerations**

To improve search and cross-linking for users looking for policies, audit and assess current policy content and eliminate redundancies. This will reduce the number of results returned when users search, even without modifications to the search algorithm, and will reveal better ways to organize policies and forms.

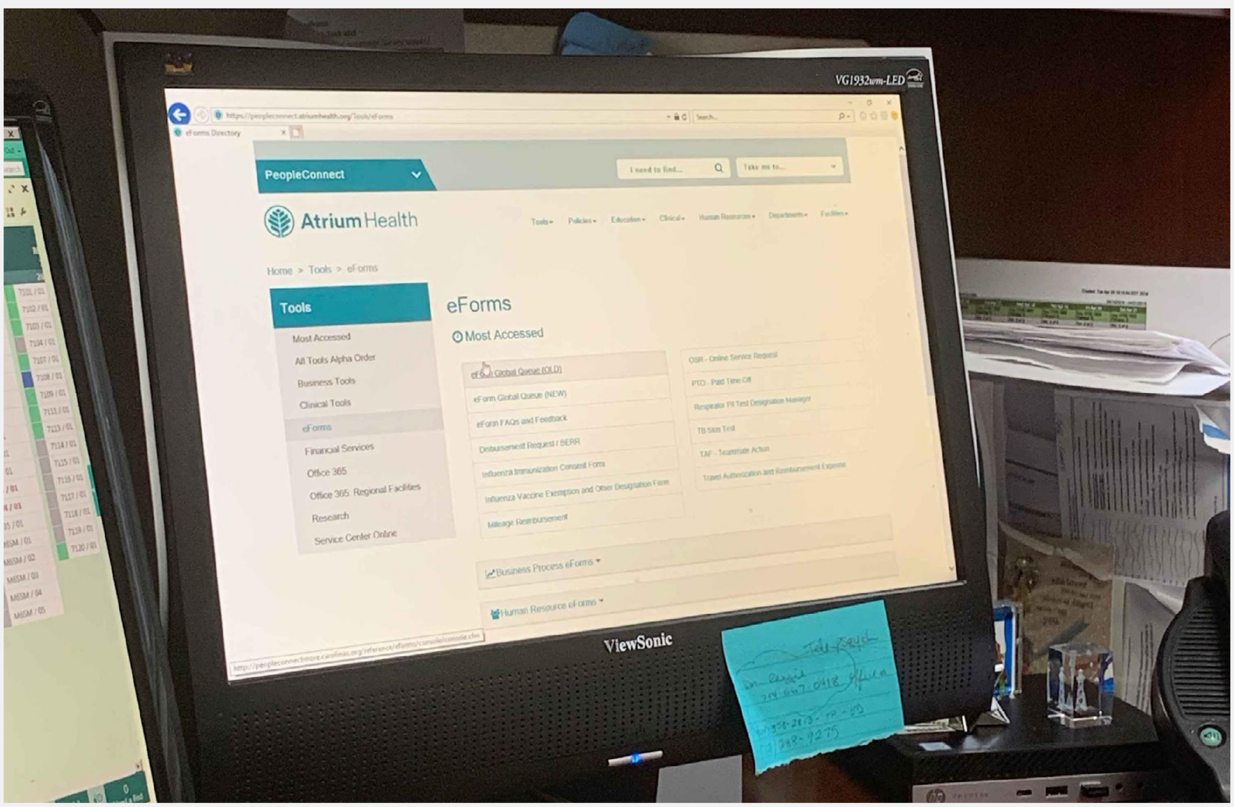
Forms and policies were an essential part of Atrium Health's intranet and overall content strategy due to the nature of the organization as an enterprise-level healthcare group. However, these content types were problematic for various user groups, who often had difficulty locating the documents they needed quickly. One team member said, "I get calls all the time, with people asking, can you find this policy for me?' I don't know if they don't have the time to go out there [in PolicyTech] . . . but when they do [look], they have difficulty finding things."

An individual responsible for managing forms on the intranet also shared a similar sentiment: "People will call us because they can't find policies. It's pretty frequent."

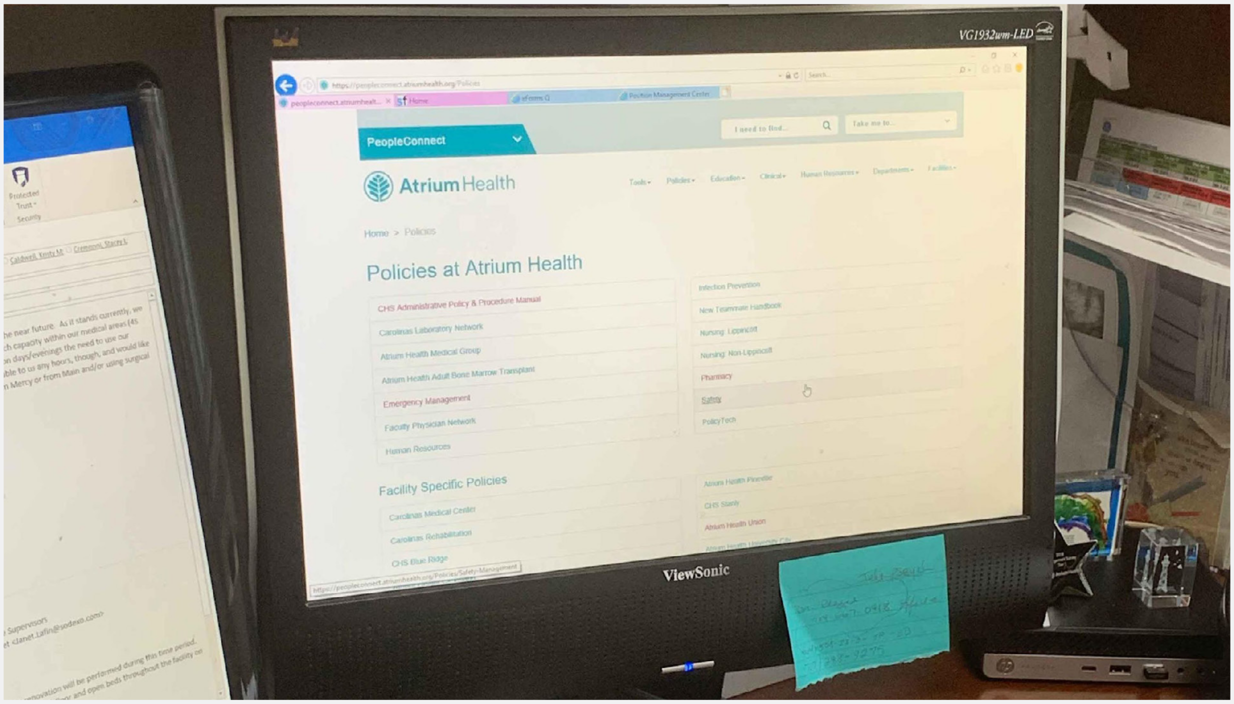
In our usability studies and interviews with employees at Atrium Health, users shared their perspectives and expectations around their desire to have a central location on the intranet to find all forms and policy documents. Several considerations fueled this, including not knowing what a form was called or assuming it would appear in one contextual location versus another.

Users shared thoughts such as, "It'd be great to have one standard way of being able to look for a policy. Not knowing where to look first is very time-consuming." Another user said, "See, it's under *Compensation*. I wouldn't put it under *Compensation*. I think it's more health and wellness [related]. That would not have been the first place I looked. To me, it isn't clear."

Other users at Atrium Health, who were much more familiar with using online forms and documents, referred to and quickly found the intranet's *eForms* policies. This discrepancy in results based on experience suggests a need for clearer paths to access the forms, and more awareness about online forms, policies, and documents is needed.




*A few users at Atrium Health struggled to find the company's web-based forms from the intranet's eForms section, while others knew right where to go on the intranet.*




*A few users at Atrium Health struggled to find the company's web-based policies from the intranet's* Policies at Atrium Health *section, while others knew right where to go on the intranet.*

Atrium Health had added complexity because some forms and policies were specific to certain facilities and hospital locations. Policies related to particular facilities were sometimes included in topic categories and sometimes listed in top-level facility categories, which didn't always make them findable. A better approach would be for Atrium Health to reduce the number of facility-specific policies as much as possible. For example, determine if having seven different policies for cleaning children's toys is really necessary. Whenever possible, keep facility-specific policies within a topic category or alongside the Atrium-wide policies that they modify — for example, a *Parking policies* folder containing the parking policies of each facility.

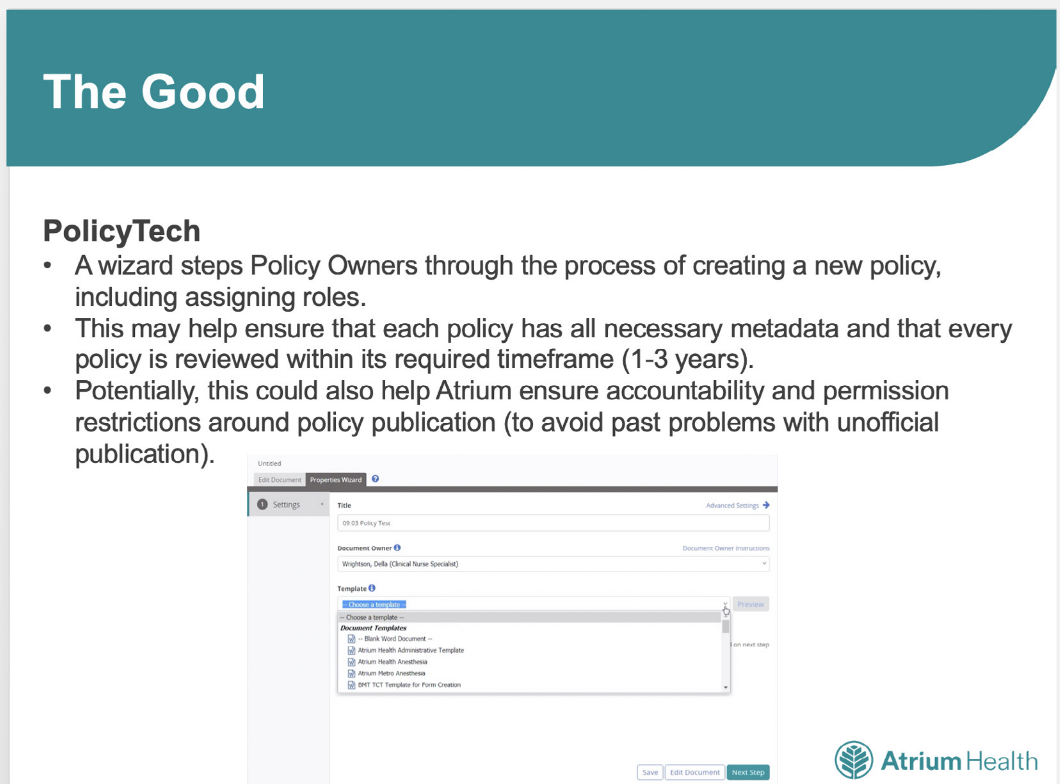
## Provide training for form and policy creators and owners.

Process and Strategic Considerations

Formally train any individuals who create, manage, or own intranet forms and policies. Hands-on walkthroughs are often helpful for individuals new to the process.

This way, they'll get a sense of which fields and steps are required in the process versus optional, what tools on the intranet they can use, and where and how to post their forms or policies.

During training, set clear expectations for how often they should review and update their forms or policies and what's involved in that process. Ensure creators know to always upload an updated *version* of a form or policy, not an entirely new document altogether. This will reduce redundancy, confusion, and the risk of employees downloading and using the wrong forms or policies.

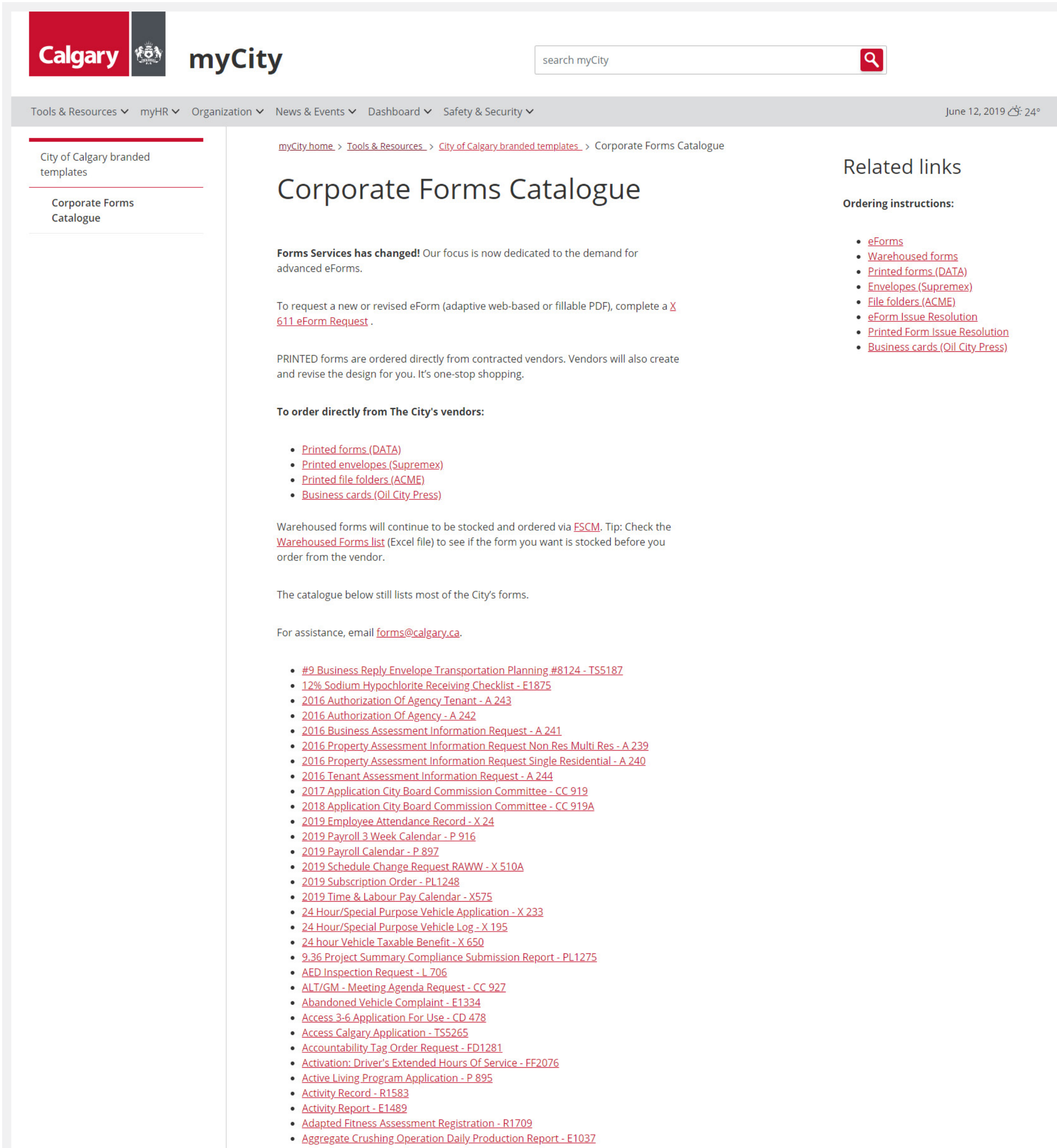



*Atrium Health used a wizard to guide new content creators on publishing a new policy. This is a great approach to ensure forms, policies, and other documents on the intranet stay organized, clear, and findable.*

## 54. Name forms and policies clearly, providing context for when and how to use each one.

In addition to not knowing exactly where to look for specific forms, policies, or documents, employees sometimes struggled to find these content types when they were named obscurely and lacked sufficient detail to inform the employee of when to use the form or policy. Employees who encountered forms or policies that seemed redundant with other documents questioned which one to use for a particular purpose. One user at Atrium Health said, “Sometimes you’d think that a policy is called one thing when it’s actually called something else.” This is why it’s important to name forms and policy documents for their purpose, using language that aligns with employees’ mental models, not what form or policy owners assume employees will understand.

At the time of our study with the City of Calgary, the organization had just reduced its intranet’s forms section from 10,000 forms to 2,000 forms. Despite this drastic reduction in the number of forms, the page housing all forms was still too long, and many form names were obscure.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City of Calgary branded templates

Corporate Forms Catalogue

myCity home > Tools & Resources > City of Calgary branded templates > Corporate Forms Catalogue

Corporate Forms Catalogue

**Forms Services has changed!** Our focus is now dedicated to the demand for advanced eForms.

To request a new or revised eForm (adaptive web-based or fillable PDF), complete a X 611 eForm Request .

PRINTED forms are ordered directly from contracted vendors. Vendors will also create and revise the design for you. It's one-stop shopping.

**To order directly from The City's vendors:**

- Printed forms (DATA)
- Printed envelopes (Supremex)
- Printed file folders (ACME)
- Business cards (Oil City Press)

Warehoused forms will continue to be stocked and ordered via FSCM. Tip: Check the Warehoused Forms list (Excel file) to see if the form you want is stocked before you order from the vendor.

The catalogue below still lists most of the City's forms.

For assistance, email forms@calgary.ca.

- #9 Business Reply Envelope Transportation Planning #8124 - TS5187
- 12% Sodium Hypochlorite Receiving Checklist - E1875
- 2016 Authorization Of Agency Tenant - A 243
- 2016 Authorization Of Agency - A 242
- 2016 Business Assessment Information Request - A 241
- 2016 Property Assessment Information Request Non Res Multi Res - A 239
- 2016 Property Assessment Information Request Single Residential - A 240
- 2016 Tenant Assessment Information Request - A 244
- 2017 Application City Board Commission Committee - CC 919
- 2018 Application City Board Commission Committee - CC 919A
- 2019 Employee Attendance Record - X 24
- 2019 Payroll 3 Week Calendar - P 916
- 2019 Payroll Calendar - P 897
- 2019 Schedule Change Request RAWW - X 510A
- 2019 Subscription Order - PL1248
- 2019 Time & Labour Pay Calendar - X575
- 24 Hour/Special Purpose Vehicle Application - X 233
- 24 Hour/Special Purpose Vehicle Log - X 195
- 24 hour Vehicle Taxable Benefit - X 650
- 9.36 Project Summary Compliance Submission Report - PL1275
- AED Inspection Request - L 706
- ALT/GM - Meeting Agenda Request - CC 927
- Abandoned Vehicle Complaint - E1334
- Access 3-6 Application For Use - CD 478
- Access Calgary Application - TS5265
- Accountability Tag Order Request - FD1281
- Activation: Driver's Extended Hours Of Service - FF2076
- Active Living Program Application - P 895
- Activity Record - R1583
- Activity Report - E1489
- Adapted Fitness Assessment Registration - R1709
- Aggregate Crushing Operation Daily Production Report - E1037

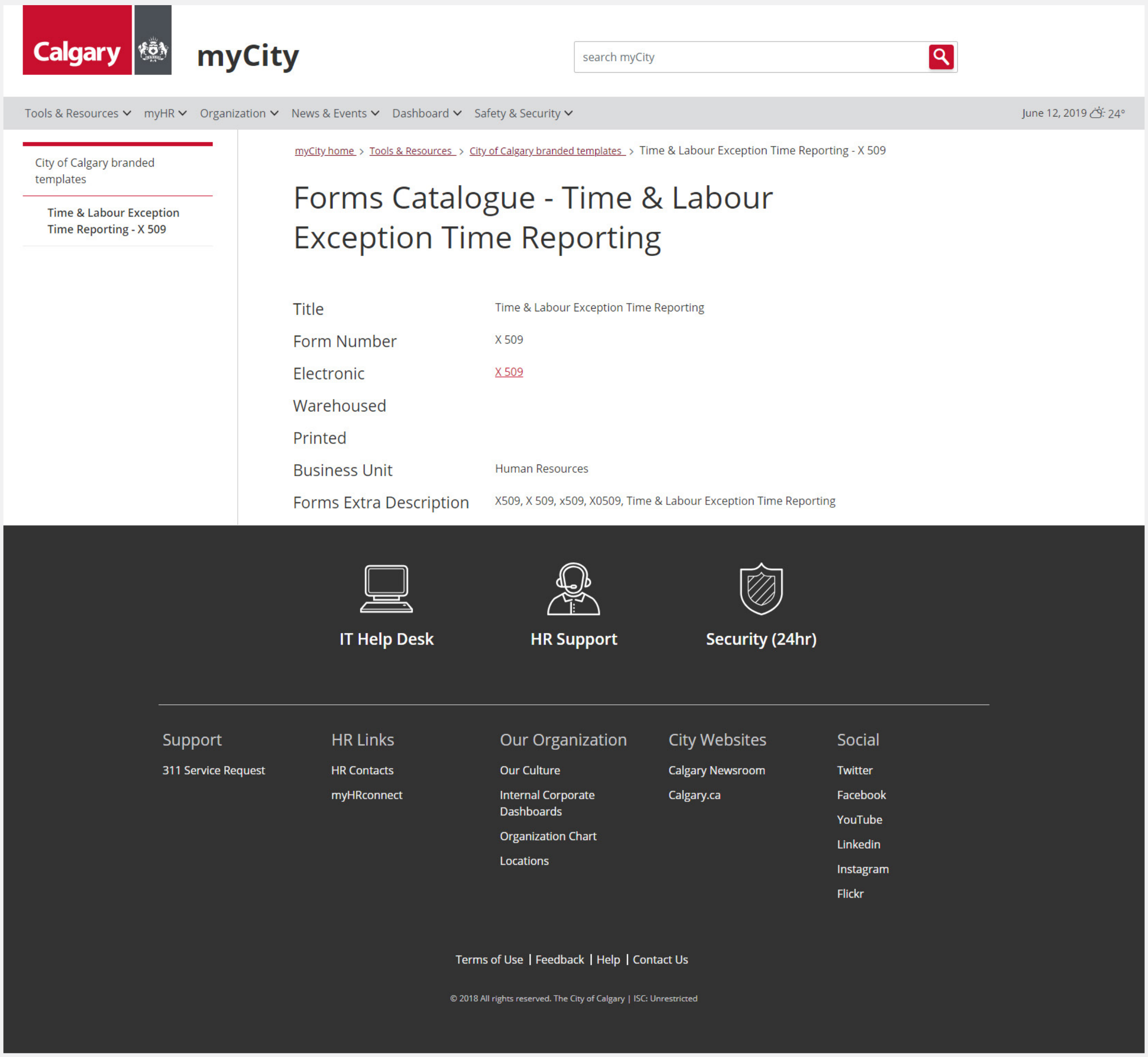
Related links

**Ordering instructions:**

- eForms
- Warehoused forms
- Printed forms (DATA)
- Envelopes (Supremex)
- File folders (ACME)
- eForm Issue Resolution
- Printed Form Issue Resolution
- Business cards (Oil City Press)

*The Corporate Forms Catalogue on the City of Calgary's intranet contained over 2,000 forms, all listed on the page in red text in a long, bulleted list. This approach, coupled with obscure form names, made it difficult for employees to find the ones they needed. A better approach would be to organize these forms into categories with clear labels and incorporate scoped search and filtering within this area.*

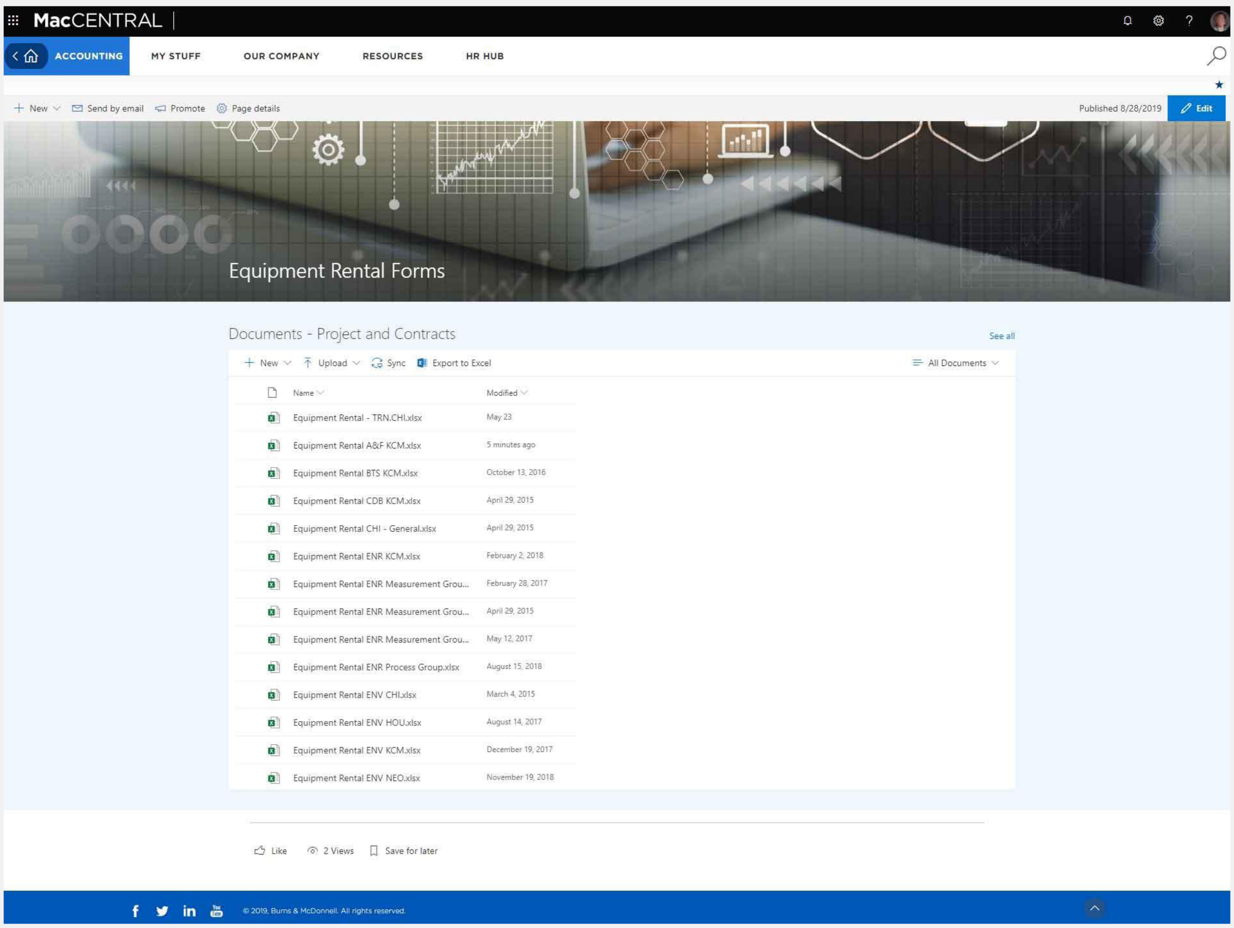
Though the forms existed, form detail pages also didn't offer any context for what a form was and when to use it. Renaming the forms to be purpose-driven, not organization-centric, and adding a description to each form detail page, telling users when they should use the form and how to submit it would have also helped. While looking for a form, one user said, "I know that it's a form from experience. Ugh, this is a huge list." Then the user then got closer to the screen and said, "I can't remember which form it is, or it might be, nope, that's not it . . . This is taking way too long."




*Form detail pages offered little to no additional context to aid employees in finding the proper forms they needed on the City of Calgary's intranet.*

When naming forms and policies, use clear language that will resonate and be meaningful for employees, but also make sure you consider how the forms and policies will display alongside one another. For example, a list of equipment rental forms for different types of equipment and office locations appeared on Burns and McDonnell's intranet. When employees reviewed this list on the landing page, each one of the forms began with the exact same phrase.

We observed and knew from years of eye-tracking research that when users encounter labels that lead with the same phrase, their eyes naturally tend to skip over the repetitive phrase in search of information-carrying words. In this case, a better approach would have been for Burns and McDonnell to lead with the equipment type or location rather than repeating the phrase *equipment rental* for each form link.

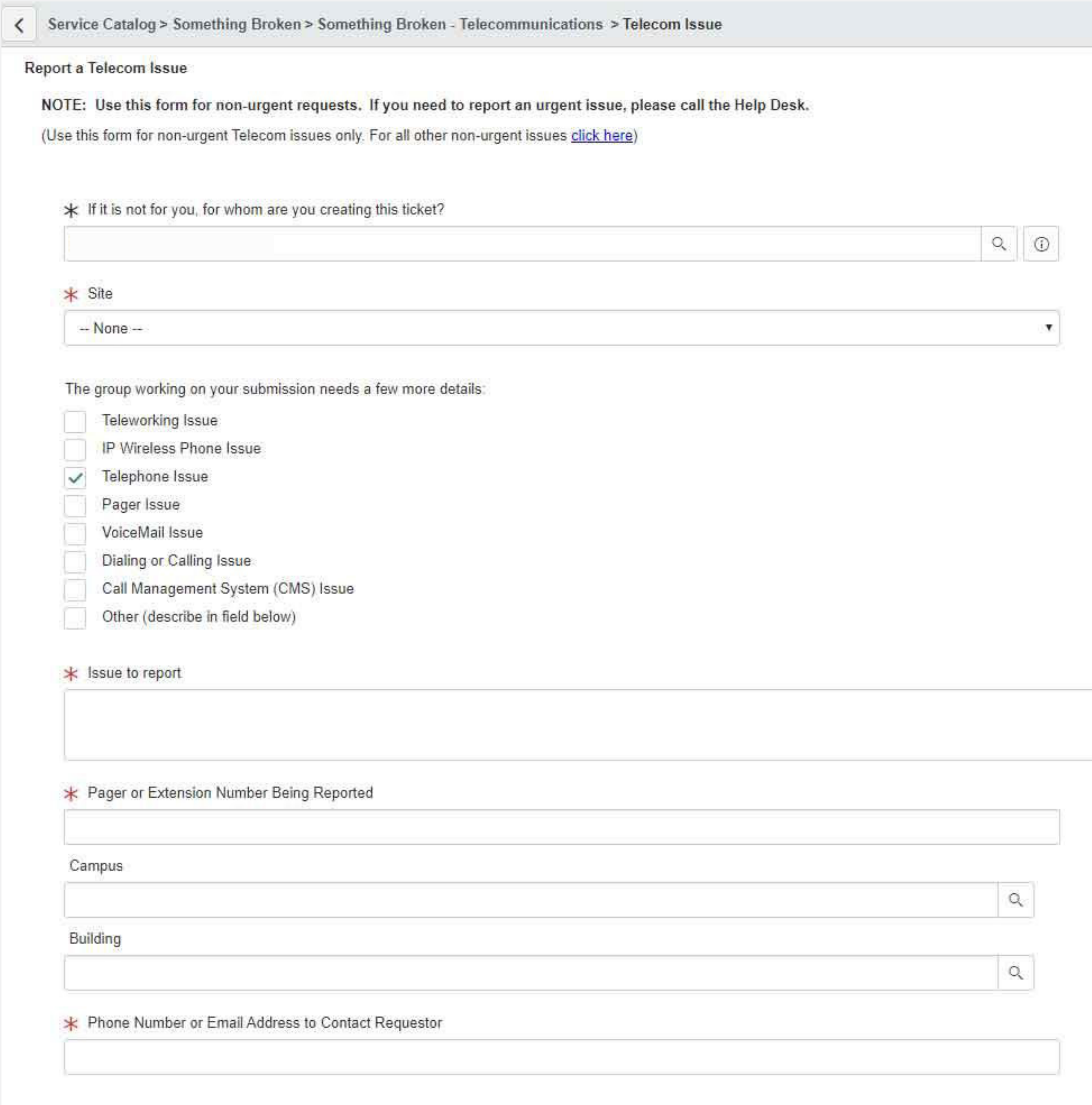



*When naming forms or policies that will appear in a list, lead with information-carrying words in the names rather than repeating the same phrase.*

## 55. Offer web-based forms and policies instead of documents and PDFs whenever possible.

Users encounter issues with forms when they're presented as PDFs or other document types instead of web-based forms. They also often have problems with finding forms. For example, finance might have consolidated its set of printable PDF forms on a single page, while HR kept its forms on a single page as well, but with a completely different UI. This made finding and dealing with forms very cumbersome for employees. These designs were also risky, as users sometimes stored forms on their computers and would use them, assuming they were up to date rather than searching for the latest version.

Whenever possible, creating forms in HTML is better than uploading forms as PDFs, documents, spreadsheets, or other native document formats for several reasons, including consistency, ease of updating, and workflow capabilities.



Service Catalog > Something Broken > Something Broken - Telecommunications > Telecom Issue

Report a Telecom Issue

**NOTE: Use this form for non-urgent requests. If you need to report an urgent issue, please call the Help Desk.**

(Use this form for non-urgent Telecom issues only. For all other non-urgent issues click here)

* If it is not for you, for whom are you creating this ticket?

* Site

-- None --

The group working on your submission needs a few more details:

- [ ] Teleworking Issue
- [ ] IP Wireless Phone Issue
- [x] Telephone Issue
- [ ] Pager Issue
- [ ] VoiceMail Issue
- [ ] Dialing or Calling Issue
- [ ] Call Management System (CMS) Issue
- [ ] Other (describe in field below)

* Issue to report

* Pager or Extension Number Being Reported

Campus

Building

* Phone Number or Email Address to Contact Requestor

*Web-based forms and policies are much more user-friendly than requiring employees to manually download a PDF, document, or spreadsheet and route it to the next step in a workflow.*

### Gather evidence to understand whether users need and expect to print a PDF.

Process and Strategic Considerations

Conduct field studies, usability testing, and contextual inquiries to determine if employees need certain forms and policies as printable documents.

It will all depend on your users' context and reading preference relative to the content, task, and what they need to do next with the form, policy, or document. If you find users don't want to print out a document, explore a better web-based format.

At DIRTT, intranet team members described the issues they encountered with PDF forms instead of using web-based forms. One user said:

> "We've come across some problems with PDF forms on the intranet. Employees and partners have to download the form in order to use the fill-in features the way we want them to use it, but that also requires the latest version of Adobe Acrobat. We always have to specify at the top of our forms and documents that DIRTT partners are using these documents, and they might not have the latest PDF readers."

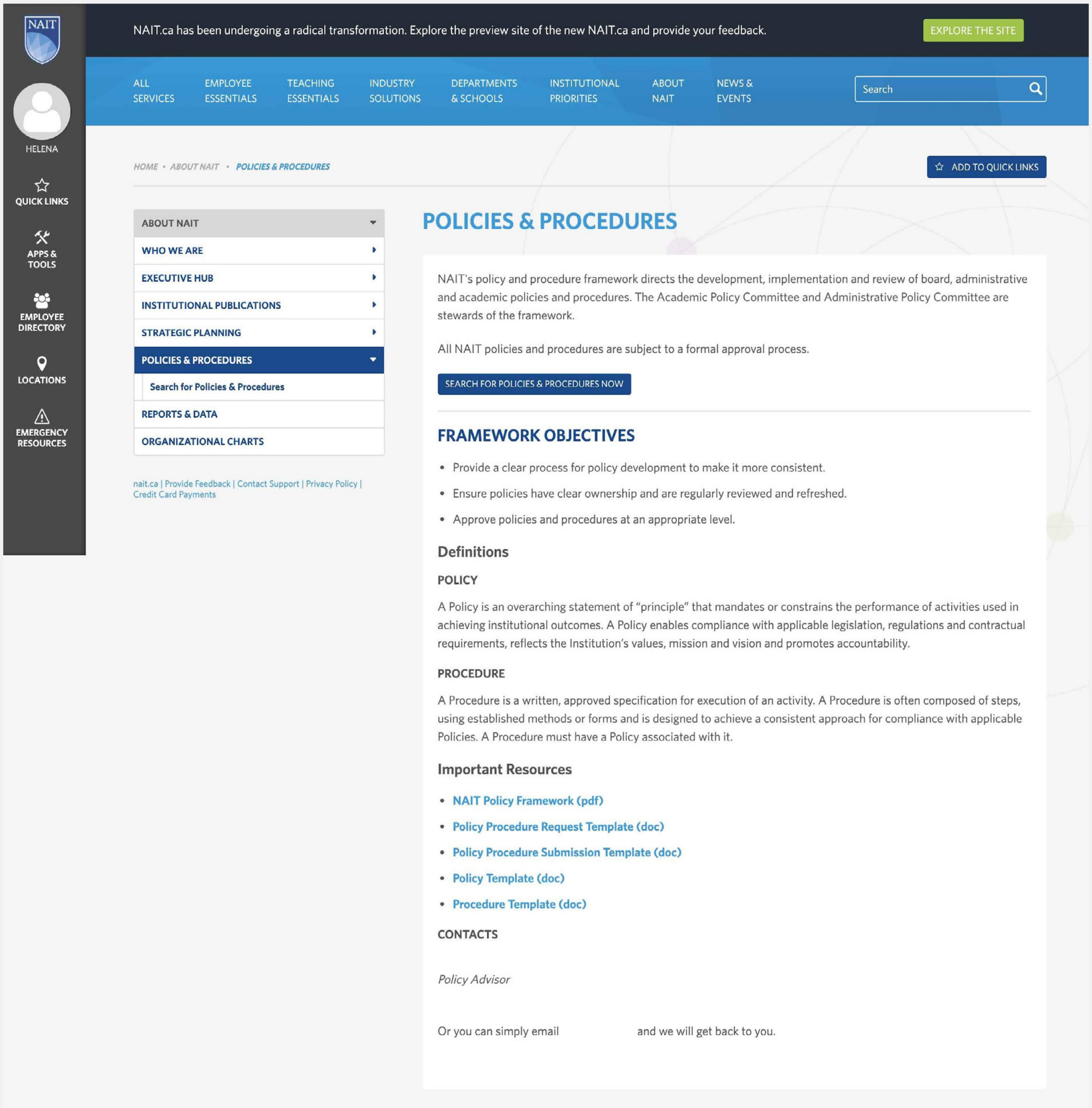
### Don't be too quick to convert your documents to the latest PDF version.

Timeless Design Tips

Like any software, many users are slow to upgrade PDF reader software when updates become available. Many people and organizations still use older PDF readers, so save your documents in an earlier PDF version to help users avoid issues when opening the document.

Team members at The Royal National Lifeboat institution explained how they used document-based forms on the intranet and that their forms couldn't be completed within the intranet. Though they acknowledged web-based forms were better for users, and their goal was to eventually have forms that could be submitted directly through the intranet, the functionality was not a high priority at the time of our study.

Similarly, the HR department at the Northern Alberta Institute of Technology would have benefitted from moving native documents and forms to online versions, but there were some barriers with their software systems holding them back. A team member said, "A lot of things are PDFs that should just be automated forms. Facilities are a big culprit in that. They don't use internal communications services or work with IT to create forms."




*Policies, procedures, and forms were document-based on the Northern Alberta Institute of Technology's intranet (which is not ideal). Still, each content type was clearly defined for users, which was favorable.*

The forms section on the Scottish Government's intranet was minimal. There was a feedback form, procurement forms, forms for parking, and a form to create a job listing. The demand for better online forms was there, but the intranet mostly had legacy forms, such as Excel spreadsheets, which tended to be quite complicated. Some forms were in SharePoint, which meant those forms sent an email to an inbox. A member of the intranet team commented on this situation:

> "We don't have any forms that are dynamic; all of them go to a person. Nothing is automated. We have a lot of signoffs that are needed. Some processes are antiquated to the point where forms are printed and stored locally."

Problems with forms and policies can arise when they are stored locally on employees' computers, which means they may not always have the most current version of the document.

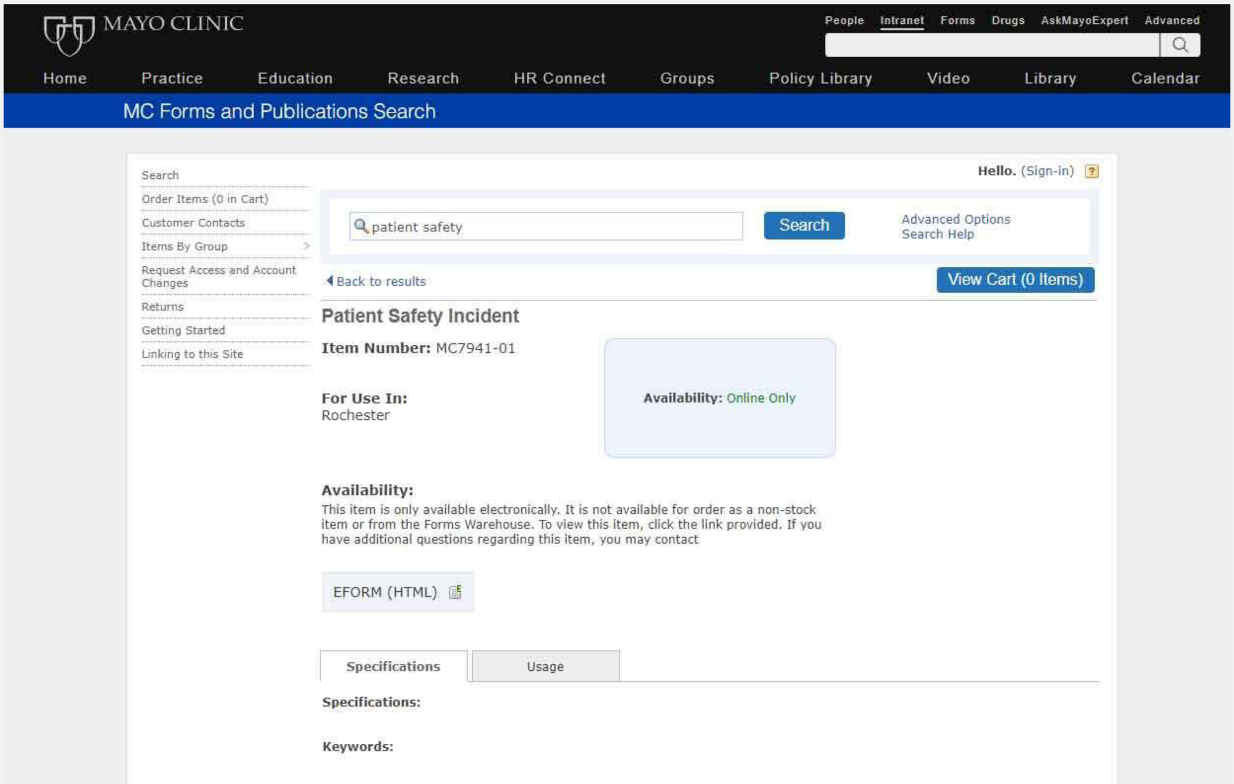
When users at the Scottish Government transitioned from using a web-based form on SharePoint to one of the legacy forms as a Word document or Excel spreadsheet, they questioned whether those forms would work reliably. In one unique task related to forms and workflows, users were confused by a process that included an online form followed by a step where they had also to send an email. Users commented that they didn't understand why they needed to send an email *and* fill in an online form, especially since it seemed it would go to the same group. One user said, "This would annoy me. Why do I have to do two separate things?" Two other users mentioned they wanted to know what to say in the email as they weren't sure. All users wrote some very basic information in the email.

In these cases where web-based forms are used in some areas of the intranet while legacy forms appear in others, communicate to users why this is the case on a form or policy detail page to instill confidence that they're following the proper process and using the correct form or policy. In the example of the two-step process that involved the form and the email, it would have been much better to let users know the reason for the two-step process and tell them where the emails go or else streamline this process so that it can be accomplished using a single web-based form instead.

The Mayo Clinic did a nice job of housing its forms and policies in a single place with detail pages that provided more context for when employees should use certain forms and policies and the format in which they would appear. Though some documents were still used for forms and policies instead of all HTML-based forms, this approach set expectations for how the form would appear. One nurse said, "I think it'd be easier for a nurse at the bedside, instead of having to print out a form [. . . ] they need it as an online reference. I think that'd be really beneficial."

However, the Mayo Clinic's approach to forms and policies was still not without its challenges. The team described a disconnect between content authors and users, as policies and procedures were still strewn about on all sites, despite having this repository where they were supposed to live. A team member said:

> "We have a policy library, but then somehow everyone has their own policies too. Content managers are creating their own little universes on these pages, but the universe should be better at a higher level. Authors are inputting based on their needs, not what the user wants. We need more librarians; to look through these things, update, and create new ones when needed. That's the complexity of our distributed nature; it really leads to a lack of understanding in upper leadership; silos are a big challenge for us."




*The Mayo Clinic's intranet had a helpful repository for forms and policies. The detail pages set users' expectations, informing them of when they'd encounter a web-based form vs. when they'd get a document instead. However, the team described an ongoing need to manage individual forms and policies despite this helpful repository.*

## NON-HTML FORMATS (PDFS, DOCUMENTS, PRESENTATIONS, SPREADSHEETS)

### 56. Offer most content as HTML rather than posting documents or PDFs.

Throughout our intranet studies over the years, we've continued to see intranets filled with PDFs, presentations, documents, and spreadsheets. These content types are often kept as documents, not because the information in them needs to be preserved in that format but because it is "easier" to post a PDF than to put the same content on an HTML page.

There are many downsides to providing content in document form rather than using web pages on the intranet, including:

- **Search:** Some search engines cannot search the content of documents, only HTML pages. This means search results may not return the most relevant information because it is hidden inside a document.
- **Related content:** HTML pages link users to other relevant content, such as guidelines, instructions, or related information on the site. Documents rarely include HTML links to other intranet content, making them more difficult to use. We've seen many examples of users finding information in a PDF file and not knowing how to find further information, even when it was available on the site.
- **Navigation:** Users may end up on a page from an email, newsletter, search results page, or other area of the site, and when content is in a document rather than on a web page, there is no sense of context. Users don't know where they are on the site or how to find related information.
- **Ease of use:** Navigating from web page to web page is typically easier and faster than opening a series of documents. We have seen users accidentally close out of browser tabs again and again when content loads as a document.
- **Access:** Users accessing the intranet from the field or on a mobile device may have trouble downloading or accessing the content in document form.

There are certainly instances where native file formats make sense for sharing documents, such as when the content needs to be maintained in a specific format for re-use or the document needs to be printed. However, we often see intranets littered with documents because no one has bothered to try to house the content on a web page instead. Ideally, ensure that most consumable content on the intranet is in web page format instead of in PDFs, documents, presentations, or spreadsheets.

A team lead at DIRTT encountered a PDF while searching for information related to how to configure one of the company's products. He said, "I reference PDFs a lot, and the material is not always helpful. Here, the answer to the question is not included in this PDF."

Another employee responsible for product-specific documentation commented:

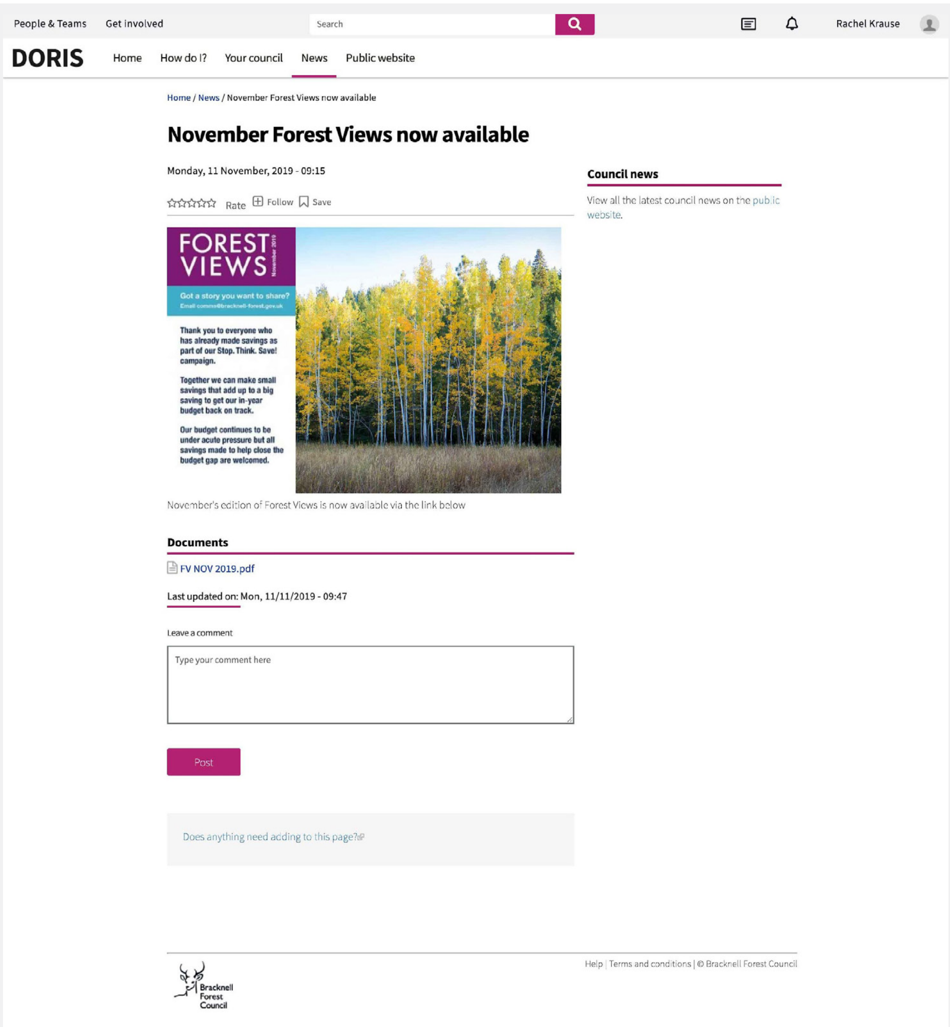
> "What we currently do is documentation that converts to PDFs. Maybe people need a searchable page or an article, but we've been doing PDFs for 10 years. Now we're wondering how we can have this information more usable and searchable on the site."

## Use HTML gateway pages instead of documents and PDFs to present content.

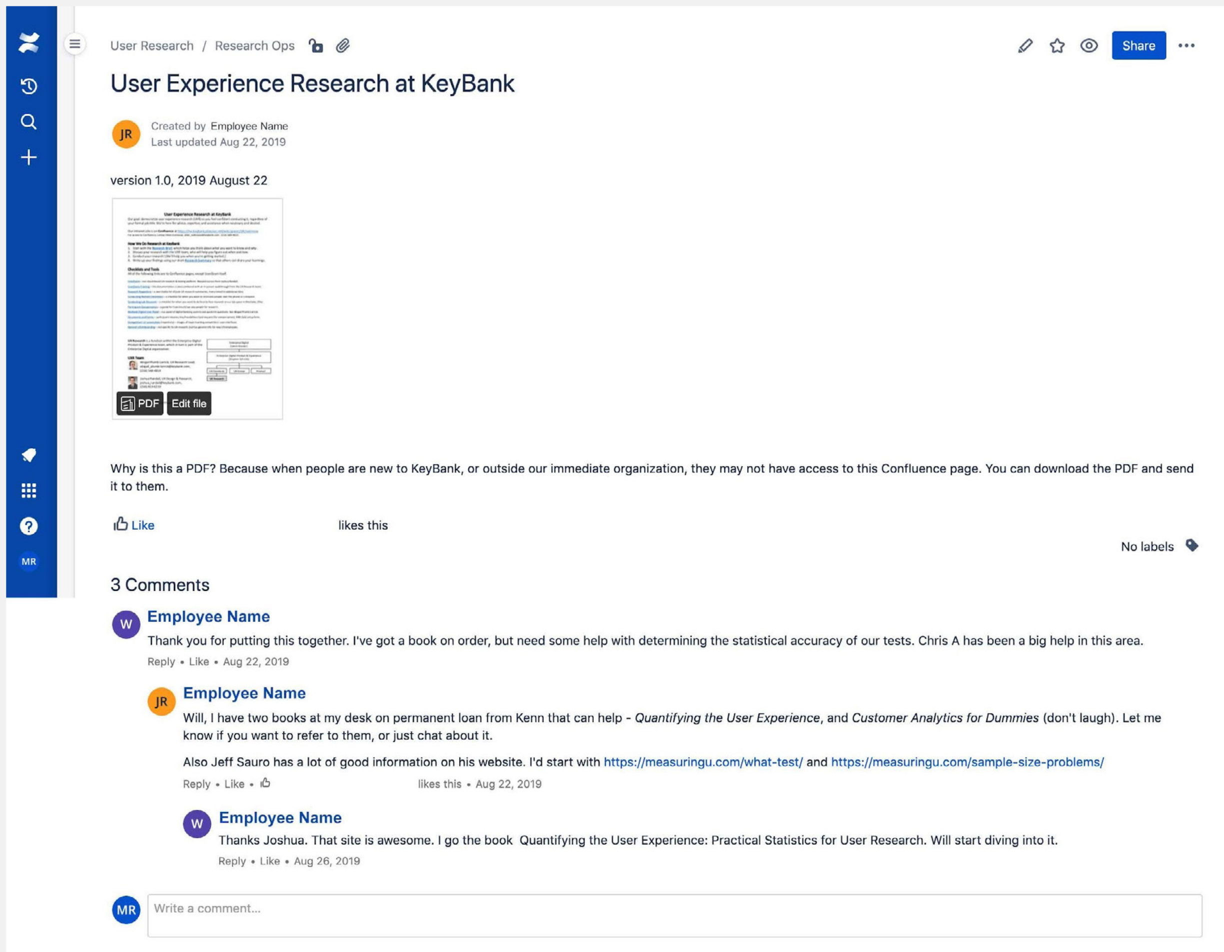
Timeless Tips

When it’s necessary to include document-based content on the intranet, such as a PDF, presentation, or spreadsheet, create gateway pages instead of just posting the document directly.

Gateway pages are web pages that summarize the main points contained in the PDF or document and provide a link to download the full native file if needed. Rather than displaying raw documents on the search results page, index and rank the web page instead to keep the search results organized.

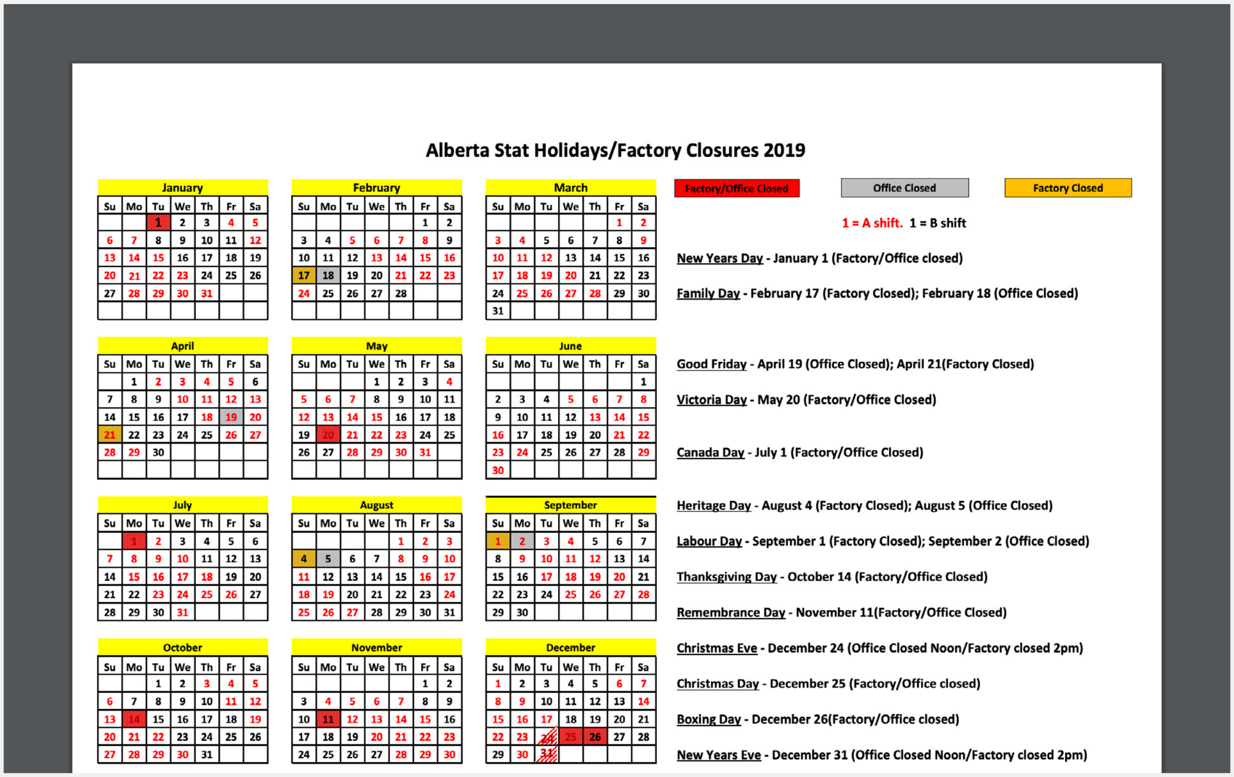



*Bracknell Forest Council used a gateway page to house its recent newsletter on the intranet. A short description on this page outlined the story’s key points and allowed users to download the full PDF if they wanted to.*




*KeyBank also used a gateway page to house A PDF. The description on the page justified why the document was a PDF:*

> … Because when people are new to key bank or outside of our immediate organization, they may not have access to this Confluence page. In those cases, you can download the PDF and send it to them.




*The City of Calgary included a PDF version of its holidays and office closures on the intranet. This PDF was linked from a web page that outlined the same type of information. This was a good example of an instance where including a PDF was helpful, as many employees had printed it and posted it in their offices.*

Across Burns & McDonnell's intranet, much information was available only in PDFs. For example, the company's travel policy was a sizeable 41-page PDF. The links in the document were functional, which was helpful, but this important information would have been easier to consume in HTML format. One participant got stuck in a PDF about childcare and never found the tuition rate for daycare. They said, "I was overwhelmed by the 41 pages of policies and procedures."

### Users don't always navigate PDFs as easily as PDF creators might assume.

User Behaviors

Clickable tables of contents are often introduced in PDFs as pseudo navigation, but users still slow down and have trouble finding what they need with them.

If you must post a PDF, be sure to include a clickable table of contents with clear headings, but don't think that it's a foolproof method of finding information in a PDF. One user at Burns & McDonnell succeeded with a clickable table of contents, saying, "It was really easy to find with the table of contents, so it wasn't as bad as I thought it would be. I thought it was going to take me longer." However, it did take her a long time to wade through the PDF with its complex numbering scheme (1.2.1.3), small text, and a complex writing style. A better approach would be to create a web page version of critical content, such as policies for travel and childcare.

The use of *Command* or *Control + F* to find something within a PDF is also not familiar to all users. Some users will take advantage of these shortcuts, but others won't.

Over-reliance on PDFs also causes employees to lose trust in the intranet. For example, at the Co-operators, a lot of content was found in PDFs, presentations, and documents. This caused a fragmented user experience, and employees questioned the accuracy of information found on the intranet. One user said, "I don't know if they [the email signatures template PDF] are updated. I can't confidently share them."

When important content is contained in PDFs (and not on web pages), it is difficult for employees to correct course. When users land on a web page, they can use related links and the navigation to find associated content. This is not always possible with a PDF.

### Use caution when opening links in new browser windows or tabs.

Timeless Tips

There is generally only one good reason to open a page in a new window, and that is because the user will need to refer to that content to complete a task in another window. For example, a nurse may reference a policy document in one window and fill out an incident form on the intranet in the other. In these situations, it can benefit the user to refer to that second window while working in the first one — provided that the two windows can be shown side by side on the screen.

For the most part, always open links in the same browser tab or window. However, if you hypothesize that opening a new tab or window may help employees in their task, don't base this decision on the type of link (same site vs. different site) or content (web page vs. native file) alone. Rely on observational research methods, such as usability testing, contextual inquiry, and field studies, to help you make the right call.

If you notice employees naturally gravitate to viewing multiple pieces of content in separate browser windows simultaneously for certain tasks, it's likely safe to open those links in new windows to support their natural tendencies. However, if users rely on a browser tab as a launching-off point and return to it later, review content in one tab with focused attention before switching to another (instead of viewing the content concurrently), or if they're using the browser window to organize and keep track of multiple tabs, those are good indications that opening such links in new tabs may be an acceptable approach.

If employees grow annoyed and lost by new tabs or windows opening, it's best to open links in the same tab and window.

Also, PDFs and other document types sometimes open zoomed out, which makes the text appear very small. One Northern Alberta Institute of Technology employee had to zoom in to a PDF to read the content they were scanning properly. They said, "It's a SharePoint PDF. I would way rather see all of this in a regular web page format. Web pages are clickable; you can move around; you can get people down the path they need to go down."

Another user at the same organization struggled to find important content because it was hidden in a PDF instead of a searchable web page. They said:

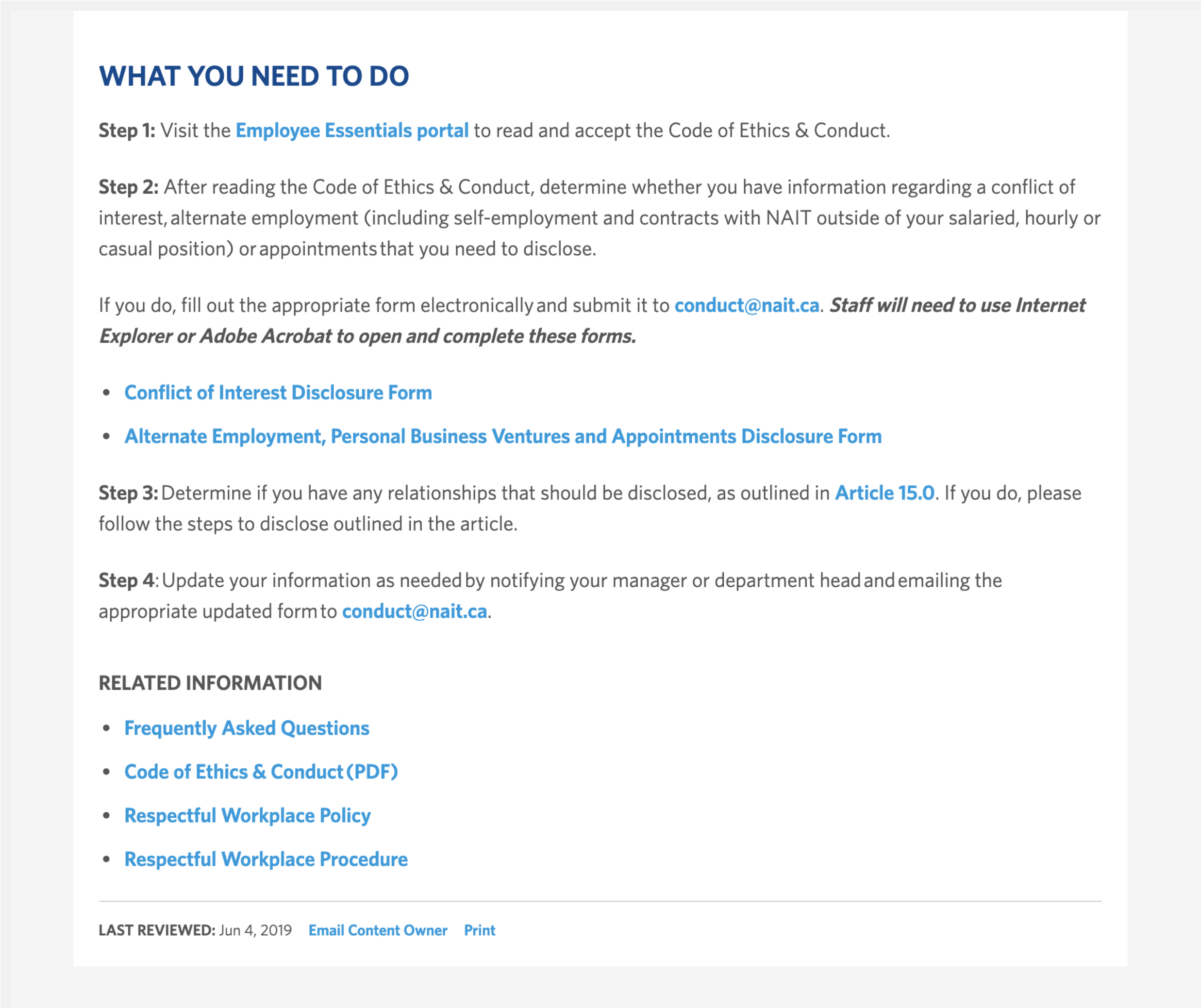
> "I don't know if it's common, but when I'm looking for content, I often find it hidden in a PDF. I prefer to see content on a web page itself rather than going into PDFs. It's the way I prefer the content rather than switching mediums."

## 57. When posting documents is unavoidable, set expectations and make them as accessible and navigable as possible.

There are several ways to make posted documents much easier for employees to access and consume. For example, on any web page housing a document or PDF, set users' expectations by providing a clear headline or link text stating that the link leads to a document or PDF. Even more user-friendly approaches include clearly labeling the link to download the PDF or document and including the page count and file size in close proximity to the link. This information will help users decide whether the document is worth downloading.

Additional methods to ensure documents are as easy to use as possible include:

- Save to an earlier version of the native file format or PDF
- Avoid giant, decorative images and multi-column text
- Ensure that the content is legible
- Support navigation



## WHAT YOU NEED TO DO

**Step 1:** Visit the **Employee Essentials portal** to read and accept the Code of Ethics & Conduct.

**Step 2:** After reading the Code of Ethics & Conduct, determine whether you have information regarding a conflict of interest, alternate employment (including self-employment and contracts with NAIT outside of your salaried, hourly or casual position) or appointments that you need to disclose.

If you do, fill out the appropriate form electronically and submit it to **conduct@nait.ca**. ***Staff will need to use Internet Explorer or Adobe Acrobat to open and complete these forms.***

- **Conflict of Interest Disclosure Form**
- **Alternate Employment, Personal Business Ventures and Appointments Disclosure Form**

**Step 3:** Determine if you have any relationships that should be disclosed, as outlined in **Article 15.0**. If you do, please follow the steps to disclose outlined in the article.

**Step 4**: Update your information as needed by notifying your manager or department head and emailing the appropriate updated form to **conduct@nait.ca**.

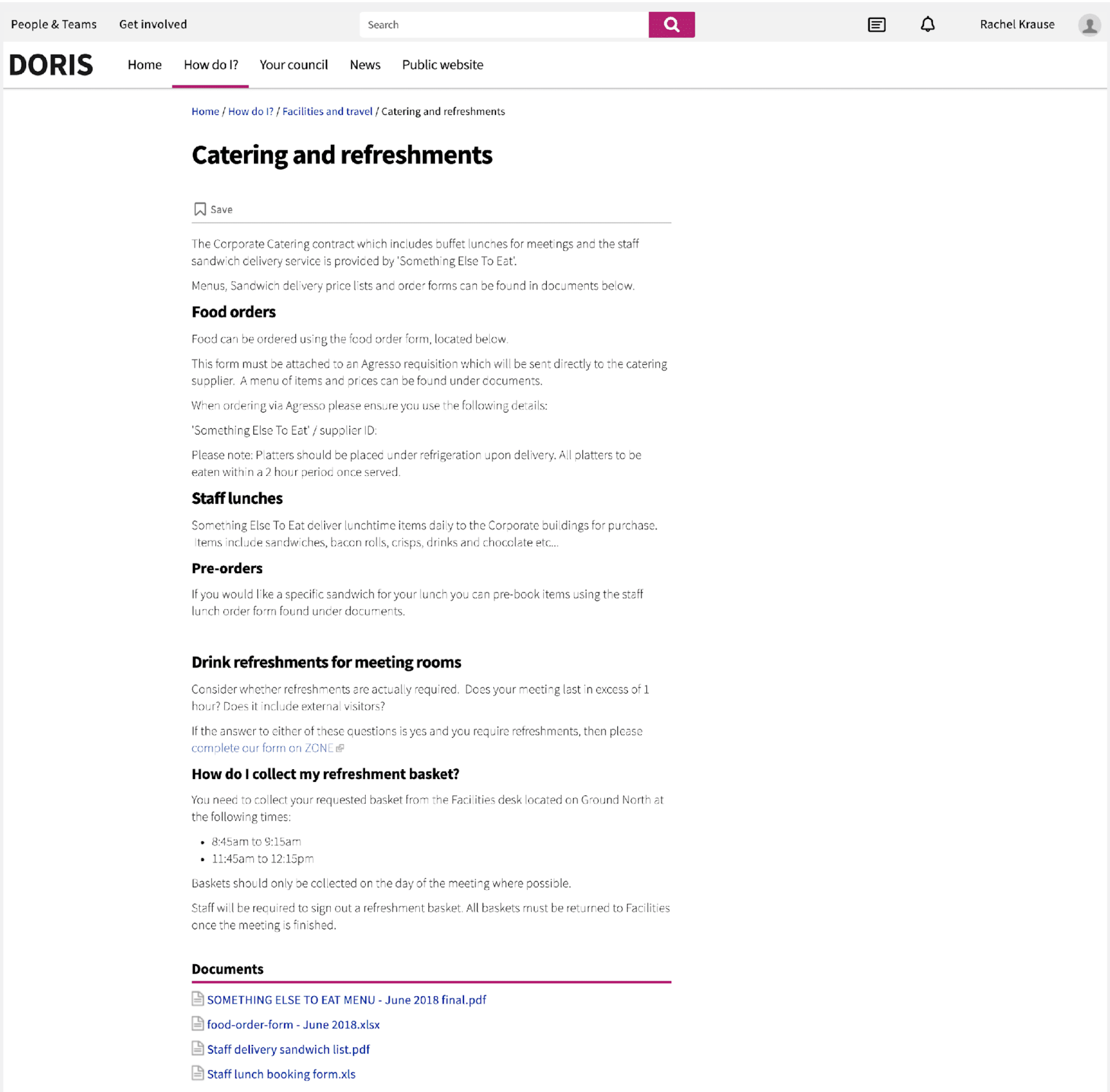
**RELATED INFORMATION**

- **Frequently Asked Questions**
- **Code of Ethics & Conduct (PDF)**
- **Respectful Workplace Policy**
- **Respectful Workplace Procedure**

**LAST REVIEWED:** Jun 4, 2019 **Email Content Owner** **Print**

*The Northern Alberta Institute of Technology did a good job of labeling its* Code of Ethics & Conduct *as a PDF. This helped users understand that by clicking on the link, they'd download a PDF.*

In one of our usability studies, when users accessed lengthy content contained in a Word document, an expanding left panel appeared by default, allowing people to search the entire document quickly. While we don't recommend housing information for consumption on the intranet in Word documents, if you must do this, tactics such as this can help users navigate the document as much as possible. It remained open to serve as a master outline or table of contents so users could quickly jump to relevant areas of the documents. Yet, despite the tool, the user still said, "Just reading through some of the docs can be quite lengthy."




*Bracknell Forest Council did a good job labeling and placing related documents in their own section at the bottom of this page. The approach helped users realize that these links would download native file formats rather than take them to web pages. One improvement to this experience would be to list the file format in plain language (PDF, spreadsheet, etc.) in parenthesis to the right of the document's title, as all users may not know what the file extensions mean.*

Make PDFs accessible when creating them, as they're inherently not. Additional work needs to be done to ensure they're inclusive; you can't just export the PDF from a word processor or presentation software and assume it's good to go. The text must be searchable, fonts must allow characters to be extracted to text, and form fields must be labeled as interactive and include error messages with proper timing. Users should be able to access bookmarks using the keyboard, and security settings on the PDF must not interfere with screen-reader capabilities. You should apply structural tags on headlines, paragraphs, and tables and set other elements to define reading order. Also, include ALT text on all images. Don't use color to convey meaning and ensure there is proper contrast between foreground and background.

### Implement consistent versioning and dating practices for documents.

Process and Strategic Considerations

It takes more time to manage updates and handle version control with PDFs than with web pages. To make a simple change, you must find the original document, make the change, ensure it's accessible, save it as a new PDF, repost it to the web, and ensure that any existing links point to the new version.

In contrast, with a web page, you simply open the CMS, find the page, make the change using a WYSIWYG editor, save it, and publish it. If you're using a component-based design, design system, or a set of predetermined templates, you don't have to spend much time figuring out how the web page will look, and the link will stay intact after the change is made.

If posting documents and PDFs is unavoidable, make sure you have clear processes for updating documents, including clearly labeling them with a date. This way, employees will feel confident they are using the most recent versions of documents.

# Translation and Localization

Diverse languages and cultures can make an intranet more interesting and inclusive for all employees. When organizations have many locations, each with distinct needs, or even a single location with employees from a variety of backgrounds and countries, the team must make strategic decisions about how to handle the content. Do all employees see the same content in the same language? Is some content **localized** for specific locations? Is all or some content **translated** into the languages spoken? This section will help you navigate these decisions.

### Translation

**Definitions, Principles, and Methods**

**Translation** is the process of converting digital content from one language to another. With translation, it's not always a direct conversion process. Certain expressions are slightly altered to align and flow naturally in the target language. When you translate a site, the look and feel of the site is identical, and the core meaning of the content essentially remains the same.

### Localization

**Definitions, Principles, and Methods**

**Localization** is a more involved process than translation. It goes beyond simply transcribing content into another language. Localization makes an application or site relevant and appropriate to that specific location. This often includes changes to a site's content, communication style, visual aesthetic, page layouts, and the way the user inputs are accepted.

## 58. If employees speak different languages, offer a translated view of the intranet or at least the most important content.

Some companies only present content on the intranet in the language primarily spoken by most individuals in the organization or at headquarters. Others provide all information in one or two official languages. If you have employees across the globe who speak different languages, it's best to offer a translated view of the intranet for the languages they speak. If a complete translation of the intranet isn't possible, aim to at least offer content translations for the most important areas, such as company news, policies, and employee benefits.

### Offer inclusive content for people at all company locations, not just at headquarters.

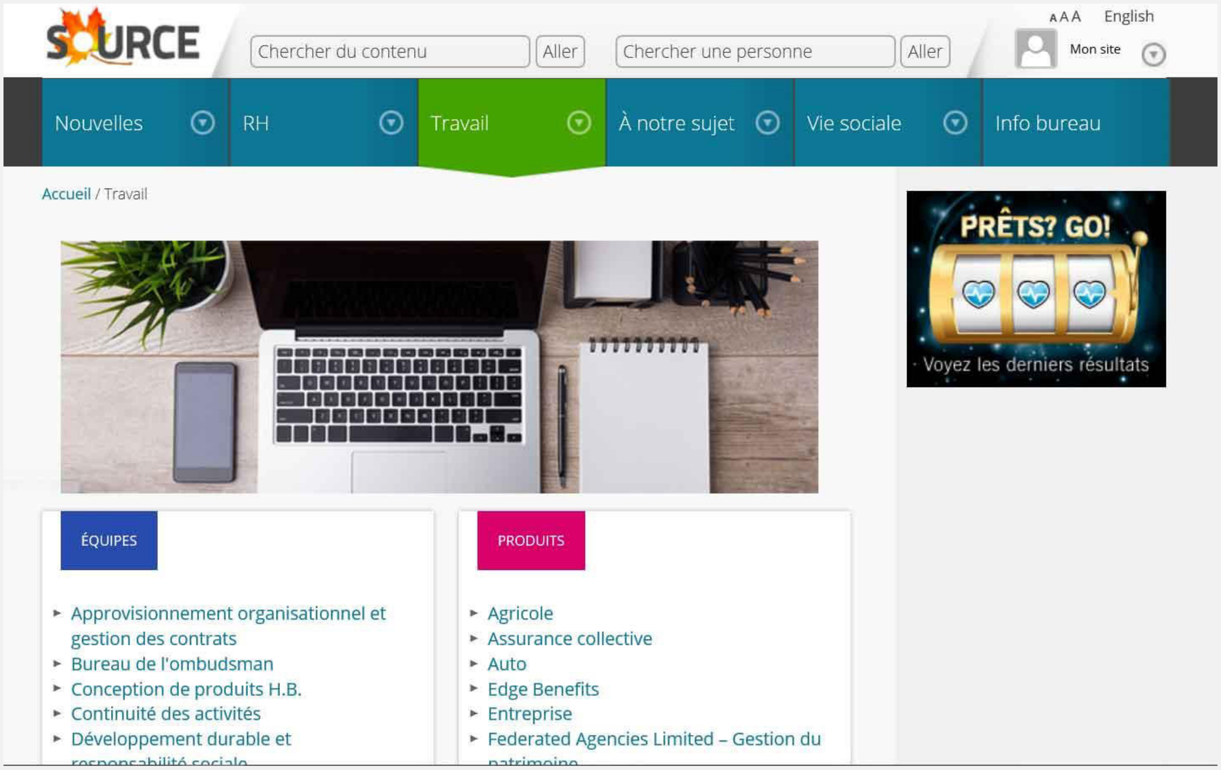
Process and Strategic Considerations

Think about and research user needs in other company locations as well as at your own, especially if you work in the headquarters location. Other company locations may need different information and tools to support their work or additional content tailored to their locations and languages.

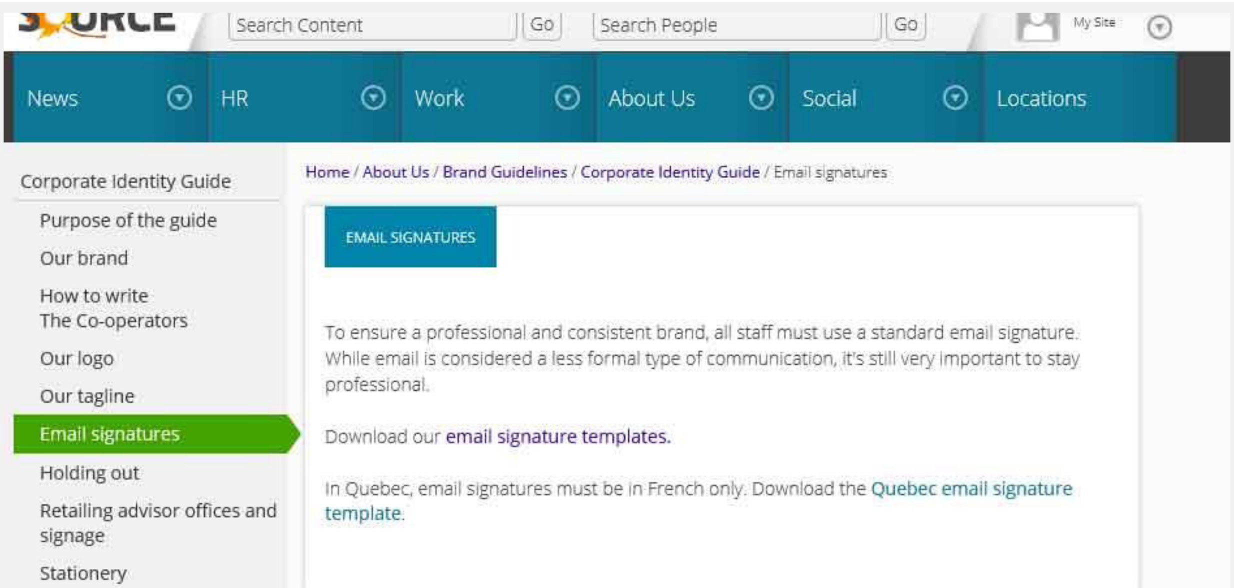
### Translating All Intranet Content as a Matter of Policy

The Co-operators is located in Canada, and because Canada is a bi-lingual country where people speak either French, English, or both, the company offered a translated version of its intranet in either French or English. Users could select their preferred language using a label that appeared in the upper right corner of the global navigation. As an added detail, the label for toggling to French was listed in French, and the label to toggle to English was listed in English.

When we interviewed a content manager at the organization, they said, “We are bilingual, so we have to create content in both French and English.” Then when we asked about how this is done and if they use Google Translate, they rightly said, “No, we shouldn’t use that. We use Broca — it’s on our internet.” When someone requests content translation into French, the team uses this software to translate the content, and then the document is assigned to a translator who checks to ensure it’s correct. The French document is then sent via Broca to the requester.




*The Co-operators offered a fully translated version of its intranet in both French and English.*

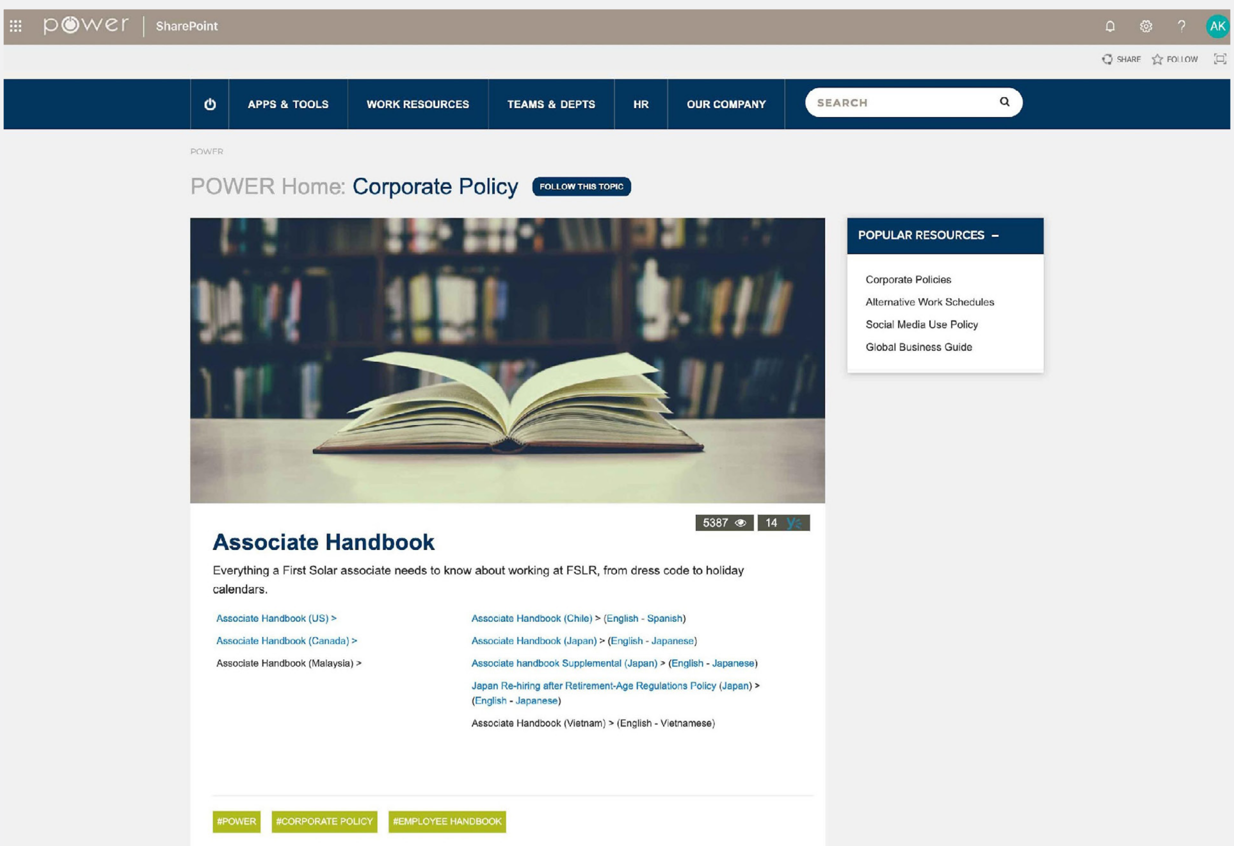



*On the Co-operators' intranet's email signature templates page, links appeared for English and French versions. This was particularly important because email signatures in Québec needed to appear in French only.*

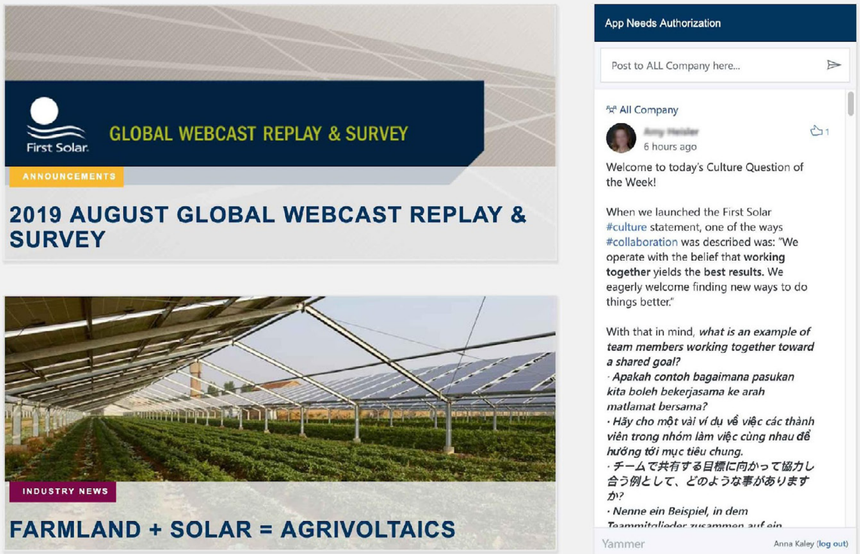
## Translating Only Key Intranet Content

Some organizations only translate high-level information and leave other translation to be done more informally. Or they let users in other locations post content in their own language for their local audience. If you're trying to determine an approach for content translation, consider appointing people in each office location as translators rather than using Google Translate or other services that may not be as accurate as a person translating the content. Or, if teams start with those services to gain efficiencies, ensure someone is available to check the content before it's posted to the intranet.

At First Solar, some content was translated, such as its mission, vision, and culture statements. Documents were also translated, but often, other content pages were not. For the company's plant workers, English was often their second language, but the team described how they hadn't yet translated intranet content to Malay because these employees are usually so fluent in English. The team explained that because the organization is expanding to Vietnam, they will need more translation in the future, but they didn't yet have it at the time of our study.




*First Solar offered translated versions of key content on its intranet, such as for the associate handbook, which appeared in English, French, Spanish, and Japanese and will eventually be translated into Vietnamese.*




*First Solar's social channels (powered by Yammer) provided the ability to post messages in multiple languages so all employees could engage.*


*The Northern Alberta Institute of Technology used PeopleSoft as one of its main digital workplace tools. Before users logged into the platform, they could select from one of many languages to choose the language in which the platform would appear. This was favorable and inclusive as organizations all over the world rely on translated versions of this tool.*

**Avoid introducing separate instances of the intranet in different languages unless it's necessary.**

Process and Strategic Considerations

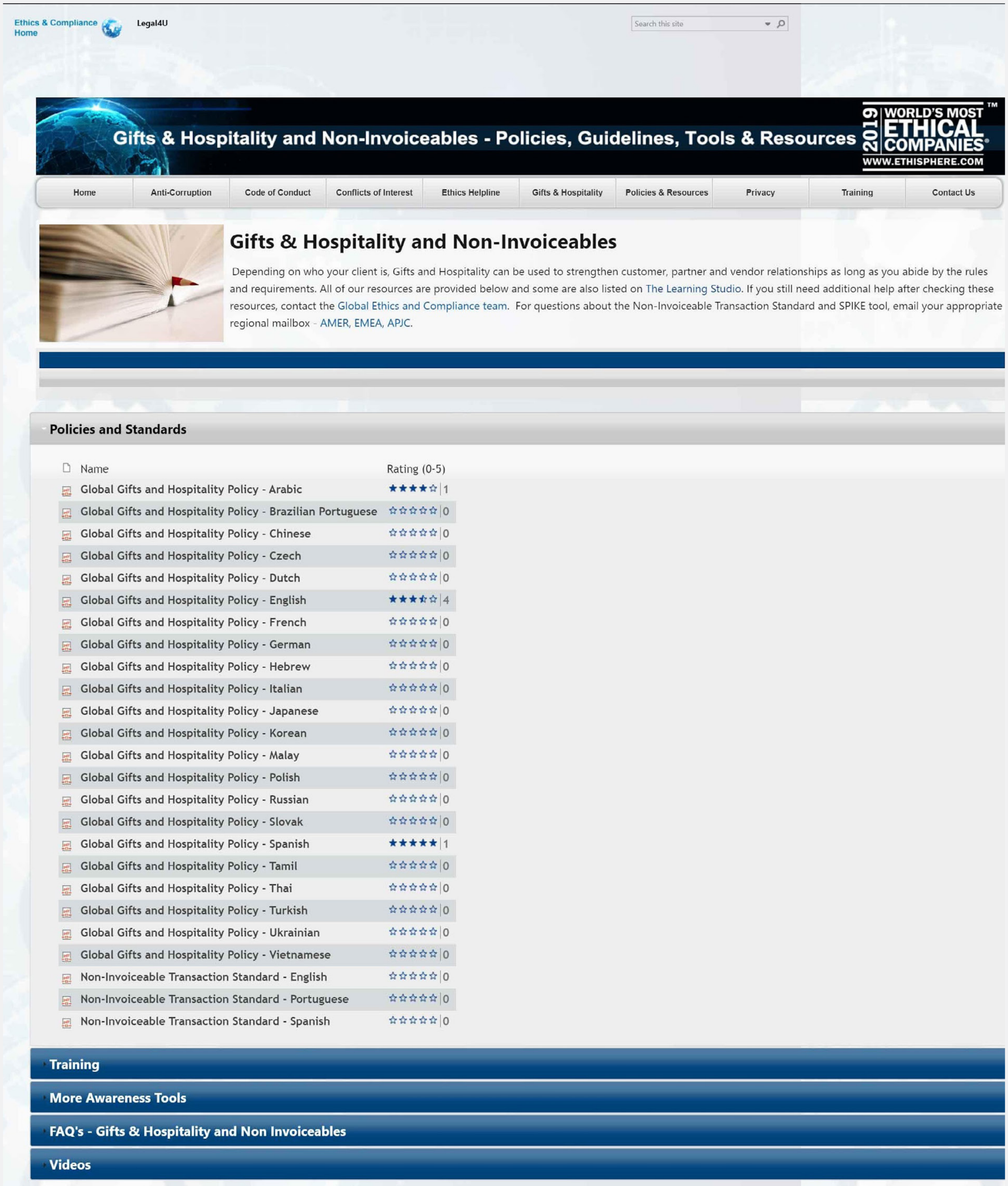
One of the most crucial design decisions, whether employees share a common language or not, is whether to design a single site or multiple sites to support different locations. When separate sites are provided, users' needs may be met, but employees outside of headquarters often feel they have to check the main intranet as well as their own, making their work to find information on the site twice as difficult.

There is no one-size-fits-all approach to handling multiple languages and locations. Each company needs to do what makes sense for its employees and cultures. For instance, if company work is traditionally done separately in each country, a single site might make little sense. If a company is moving toward becoming truly global, sharing knowledge, resources, and tools, a single, translated version of the intranet might be critical.

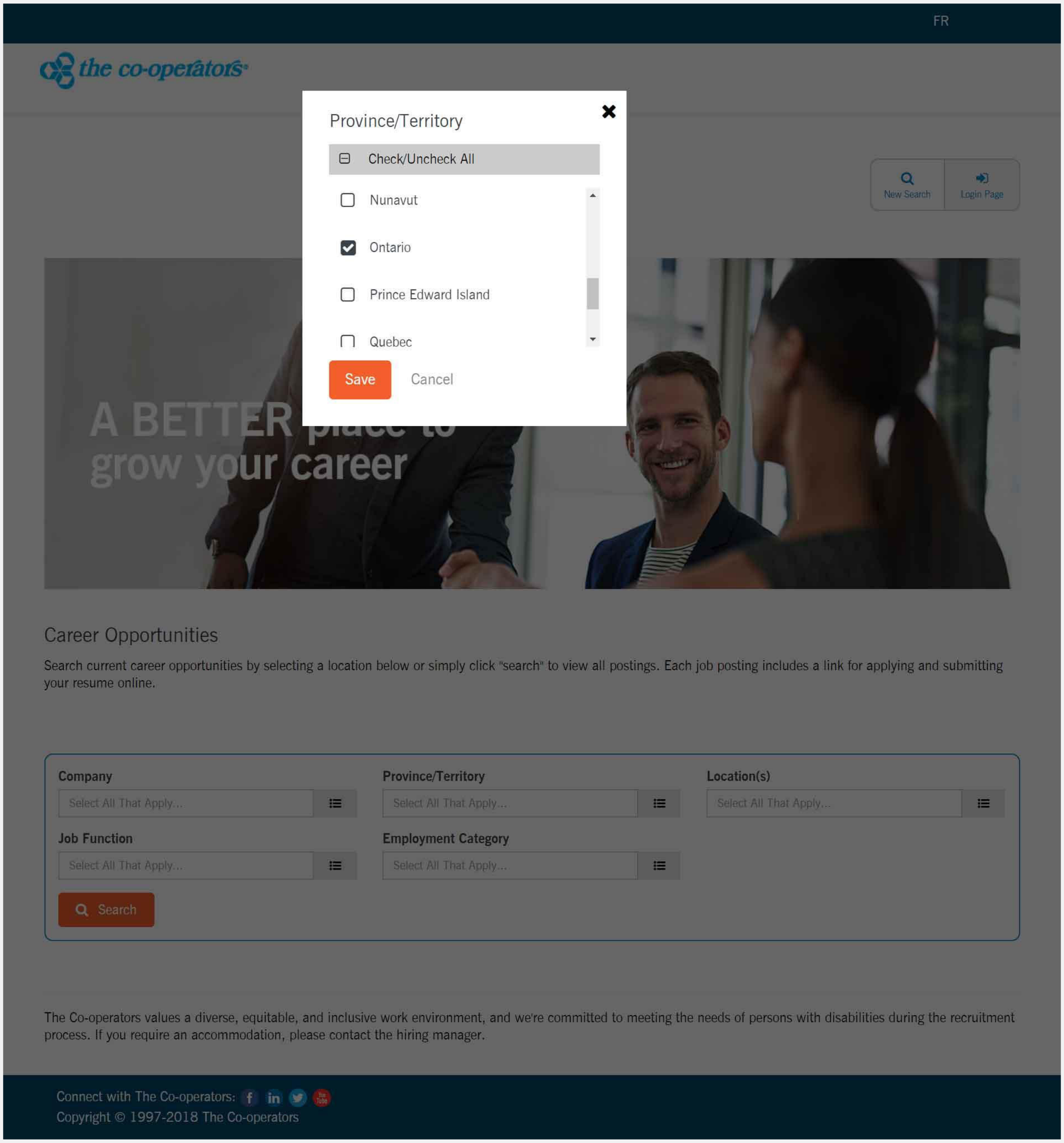
## 59. Use personalization to show content and language(s) that align with the employee's primary locations.

Having one translated intranet can make employees in other offices feel more connected to the company. However, it can also make knowing where to look for location-specific information difficult. A solution to this challenge might be to present personalized, location-based content on the homepage or another site area.

For example, Dell presented its *Gifts & Hospitality* guidelines as PDFs on its intranet, one for each language employees needed. If the content had been presented as an HTML web page instead, personalization could have been used to only show the version(s) of the policy that apply to the employee's primary location and language. This would reduce the need for so many PDFs and make it much easier for employees to find the translated content they need.




*Dell's* Gifts & Hospitality Policy *page lists 14 guidelines in different languages. A better approach would be to use personalization to show only the translated version in the user's preferred language.*

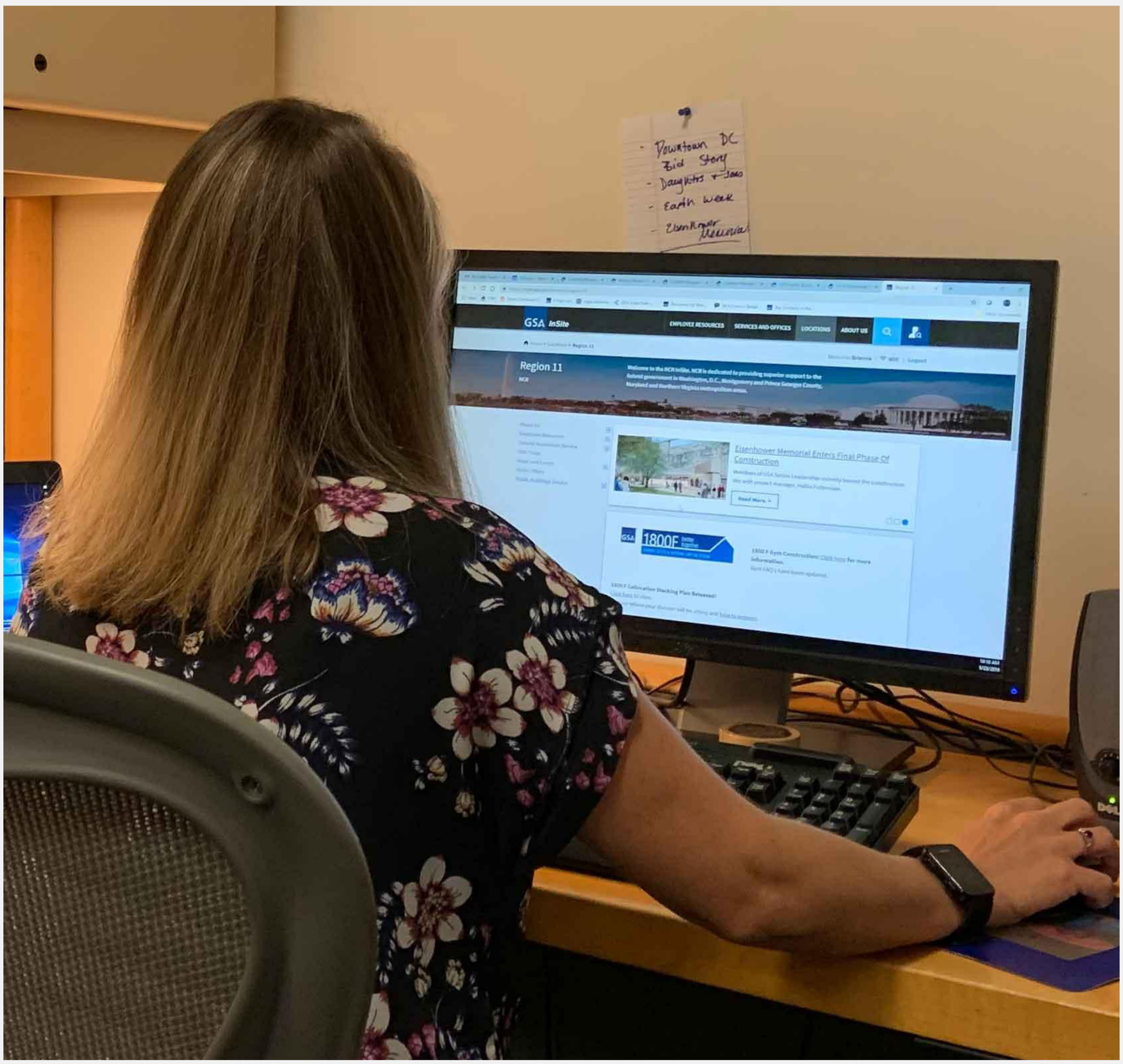



*Rather than using personalization, the Co-operators allowed users to remain in control of picking their location before landing on the intranet's* Career Opportunities *platform. This way, when a user selected an area that spoke French, the site would automatically display the content in French.*

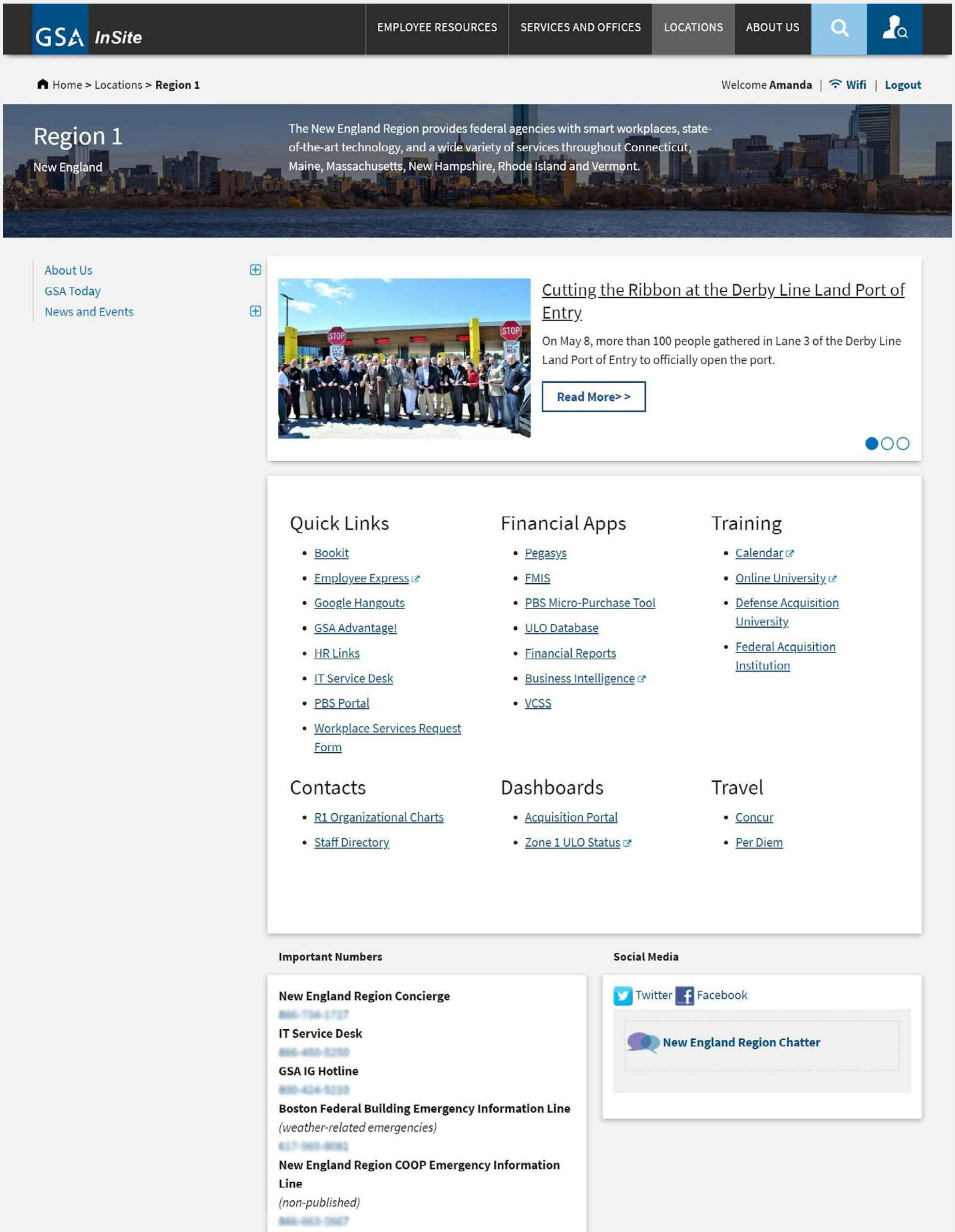
## 60. Create intranet pages or sections to dedicate to specific company locations.

Though the majority of content will likely be globally accessed across the intranet by all employees, giving specific locations their own spaces to post relevant content, events, news, resources, or other team happenings is favorable.

As an added benefit, when the entire intranet can't be fully translated and localized, these specific location spaces can be translated on a smaller, more manageable scale, so employees can still get translated versions of the most important content here. In addition to translation, this is just a good content practice for employees in local offices, even if they all speak the same language.

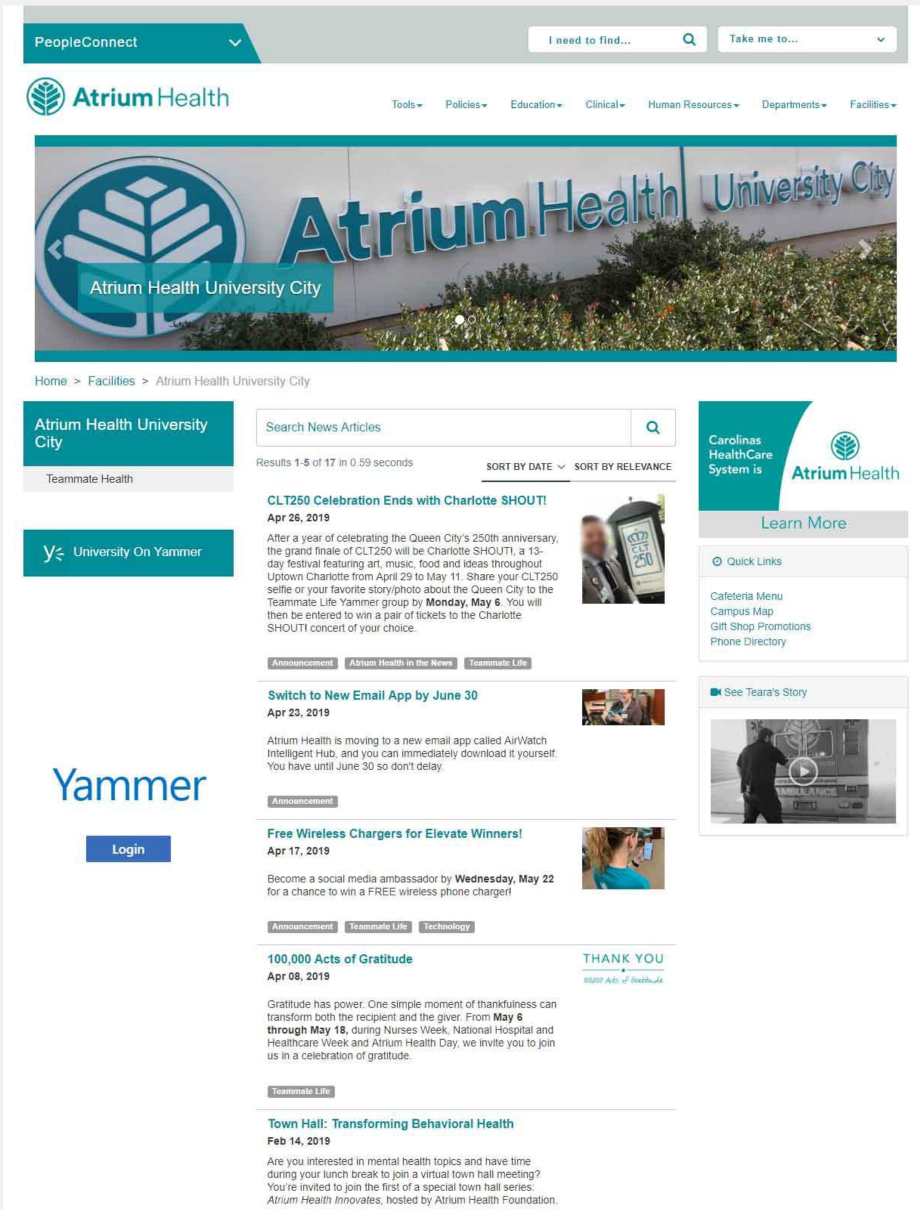



*An employee at the General Services Administration engages with her region's page on the intranet.*

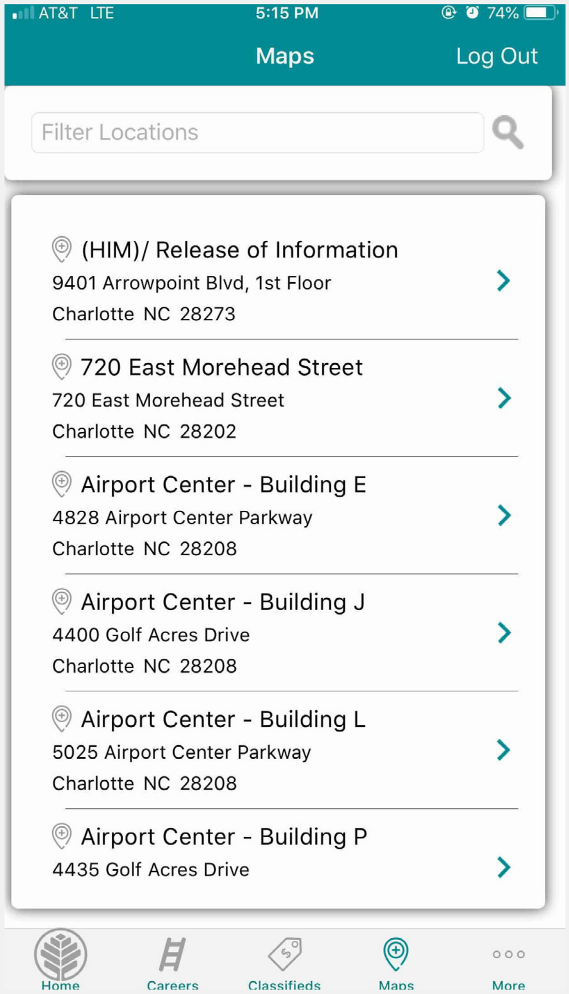



*On its intranet's location-specific pages, the GSA did a great job introducing what the region did and where they were located. These pages also included location-specific news, quick links, applications, training events, contacts, relevant dashboards, and important contact information. A link to the organization's location-specific social channels also appeared here, which was favorable.*

We observed another instance of useful, purposeful location-specific pages on Atrium Health's intranet. With Atrium office locations expanding rapidly, each page offered maps, directions, specific links, and location details. These pages helped employees navigate to various offices, answer location-specific questions, and learn more about each location before arriving there. Helpful location information included parking deck information, what the buildings look like, and approximate drive and park times from other network locations.

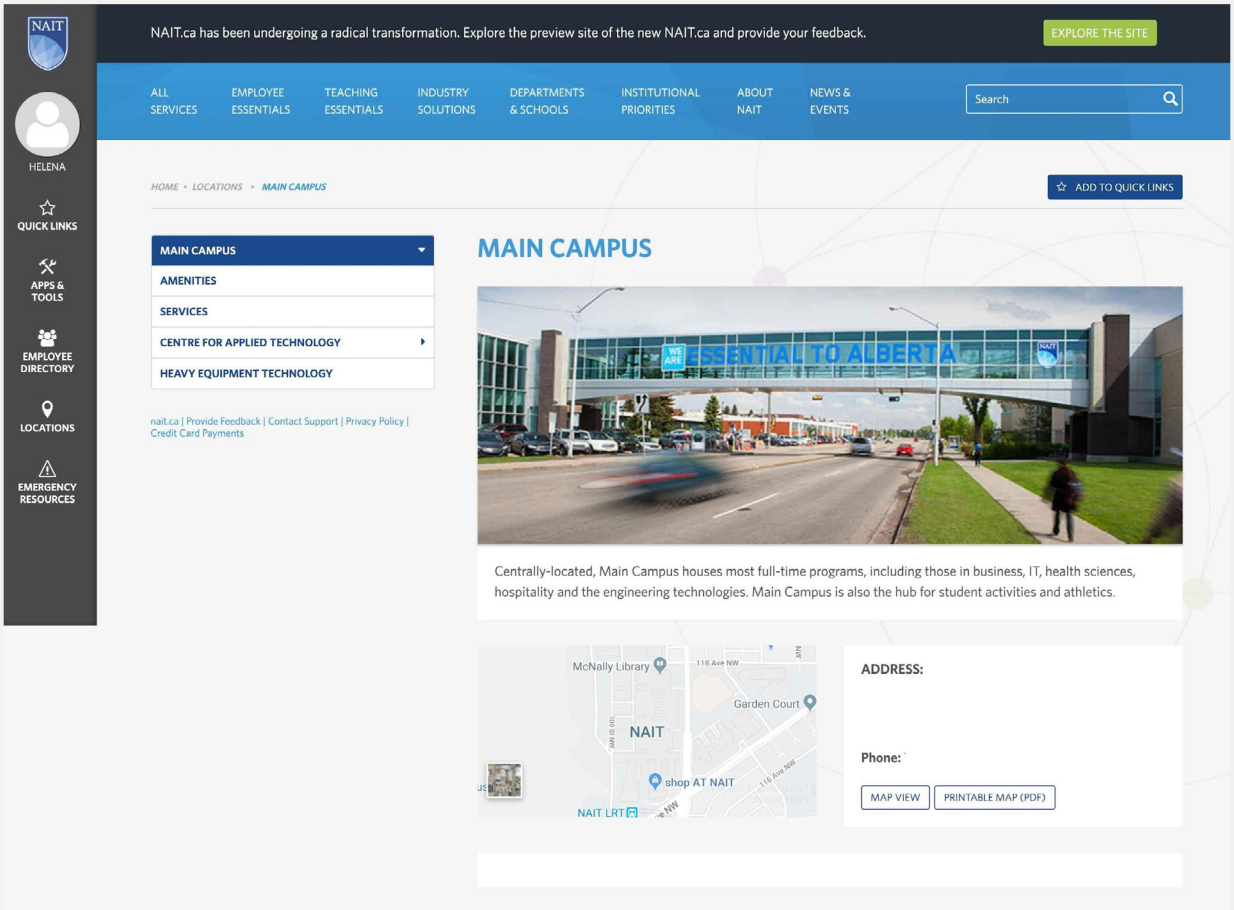



*Atrium Health included location-specific pages on its intranet, which provided employees with necessary details, links to key resources, and more. These pages also appeared for important departments within the company, such as Human Resources, to represent Atrium's multiple office locations nationwide.*




*Because employees often moved from one location of the hospital group's campus to another for meetings, Atrium Health also included* maps *as a key part of the mobile app version of its intranet.*

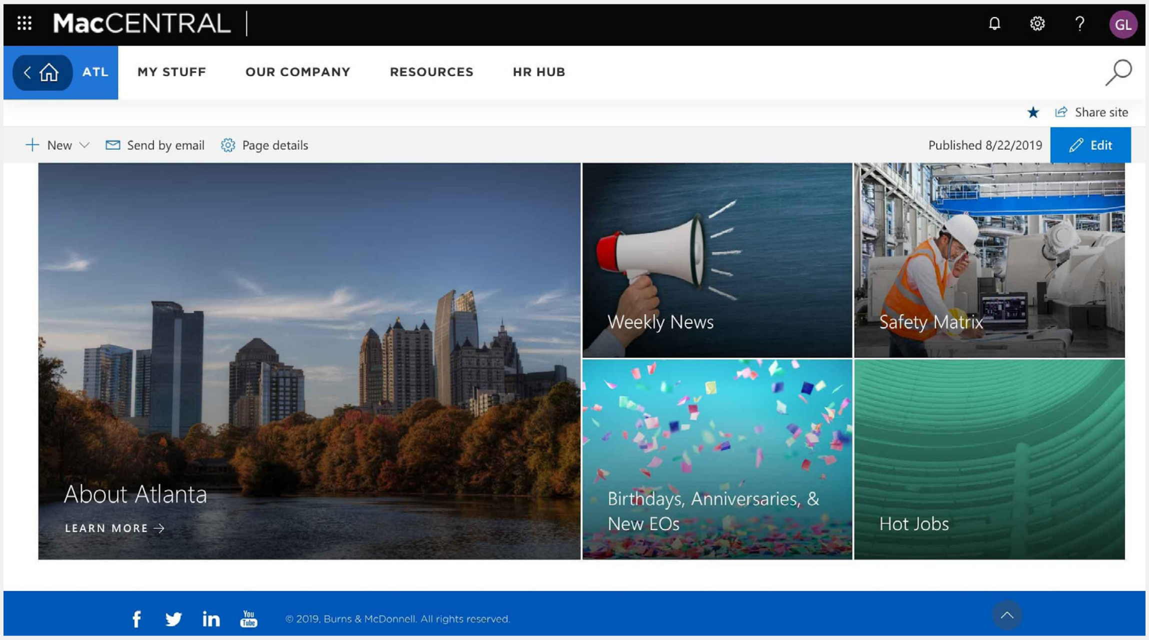
On the Northern Alberta Institute of Technology's intranet, locations were a challenge because of the organization's multiple campuses. The intranet team described how they had updated the locations pages and content strategy the previous year so that joint teams owned these. One team member said, "For location-specific pages, content editors are in departments; they have the information and should manage the details about the location, but they don't always get around to that." To ensure important location information stays updated, set a regular cadence, such as quarterly, for content editors to intentionally review everything in their section for anything that needs to be added, updated, or removed. Checking links in the sections is also an important maintenance task to ensure there aren't any broken paths to location information.




*The Northern Alberta Institute of Technology included location-specific pages and content on its intranet. Appointed content managers within departments at each location were responsible for keeping the content updated, which was sometimes a challenge without a structure and regular frequency.*

During a virtual field study, we observed a content manager from Burns & McDonnell who worked in the Atlanta office. She was responsible for content updates for that location page on the intranet. She said she checked the page often, especially because she was in there almost every day to update the birthdays and anniversaries which appeared on that location's main landing page. One of the intranet team leads at Burns & McDonnell shared some thoughts on the challenges associated with adding location-specific content to the intranet:

> "Some of the journey was identifying people to own their content so that we could have more connection with people outside of our headquarters location. At first, people didn't want to share, especially on the engineering side of our business. It was tough to get people to try to interact. It's taken a real change in our culture to work."




*Burns & McDonnell's intranet had nicely designed, location-specific pages that included information about the location, tailored weekly news, safety information, birthdays, anniversaries, new employee-owners, and recent jobs available in the office.*

The Mayo Clinic tailored its intranet content to meet the needs of employees at seven campus locations across its expansive network of hospitals, doctors' offices, research centers, and more. In addition to having dedicated sections of the intranet for each location, anywhere that global content appeared, such as on the health and wellness site, specific links to regional pages also existed to communicate information about local events and happenings in those areas. This was a good approach since there was more exclusive information for each location, in addition to what was available for all employees.


*Mayo Clinic linked to location-specific content throughout its intranet.*

# Managing and Publishing Content

**Content management systems (CMS)** are platforms that support publishing digital content easily and consistently. Some intranet content management software includes features to support tracking content, enforcing standards, and even managing content lifecycle.

### Content management system (CMS)

**Definitions, Principles, and Methods**

A content management system is computer software used to manage the creation and modification of digital content. CMSs are typically used for enterprise content management and web content management.

Whether you're using a custom-built CMS or an out-of-the-box platform, it's important to understand what features your intranet's CMS system includes. For example, does your intranet's content management system automatically notify the owner of a piece of content that hasn't been updated for some time? It should, but you want to be sure to collaborate with development partners or IT to understand how your intranet's CMS either supports or detracts from your overall content strategy.

## 61. Establish clear roles, responsibilities, and ownership for all areas and pieces of content on the intranet.

Before any content makes its way into a new CMS, or if you're taking an inventory and auditing your current content, make sure someone is responsible and accountable for all intranet content and sections. These roles and responsibilities will be largely determined and dependent upon the content-management model followed for the intranet, either a centralized, distributed, or hybrid version of the two approaches. More on choosing a content-management model can be found at the beginning of this report.

Without ownership and ongoing monitoring, no matter how good your platform or CMS is, the intranet's content will grow unwieldy and become outdated over time, so it's best to have someone responsible for it, in addition to any AI-based tools integrated into the CMS.

We noticed issues with a lack of ownership over content on Dell's intranet, as its intranet was built on more of a social platform than a traditional CMS. The experience varied drastically from site to site, and there was no way to templatize, leading to governance and UX problems. Anyone could change pages if they had permission, and if the content was set up to be collaborative, anyone could edit the pages within it. This lack of content ownership was not a favorable approach. Even if you're following a distributed content-management model, where many employees across the organization contribute content, it's still important to have people monitoring the content to ensure it doesn't get out of hand.

The Co-operators followed a distributed content-management model, and team members described how business partners own the content on the intranet's subsites. The central intranet team creates a template site for them, but the business partners own and manage the content from there. Some people spend their entire day on the intranet, while others may not spend much time there at all, but for web publishers, it's how they spend the majority of their time; 50–85% of their job is managing content.

Eyeo also followed a hybrid model of intranet content management, where the internal communications team, led by an intranet product manager, created, published, and managed the homepage content and any company-wide information on the intranet. Individual teams and departments could manage their own sections using a templated space, with a landing page and various subcategories underneath, such as a team blog, calendar, and integration with the company's project tracking software, JIRA. The intranet was quite new at the time of our study, but the intranet team described how the organization was about to undergo some changes, leading to their concerns about content ownership would be managed moving forward. One team member said, "We have one person who reviews the news content. We are starting a major restructuring of the company; a big challenge is who will own different parts of the content."

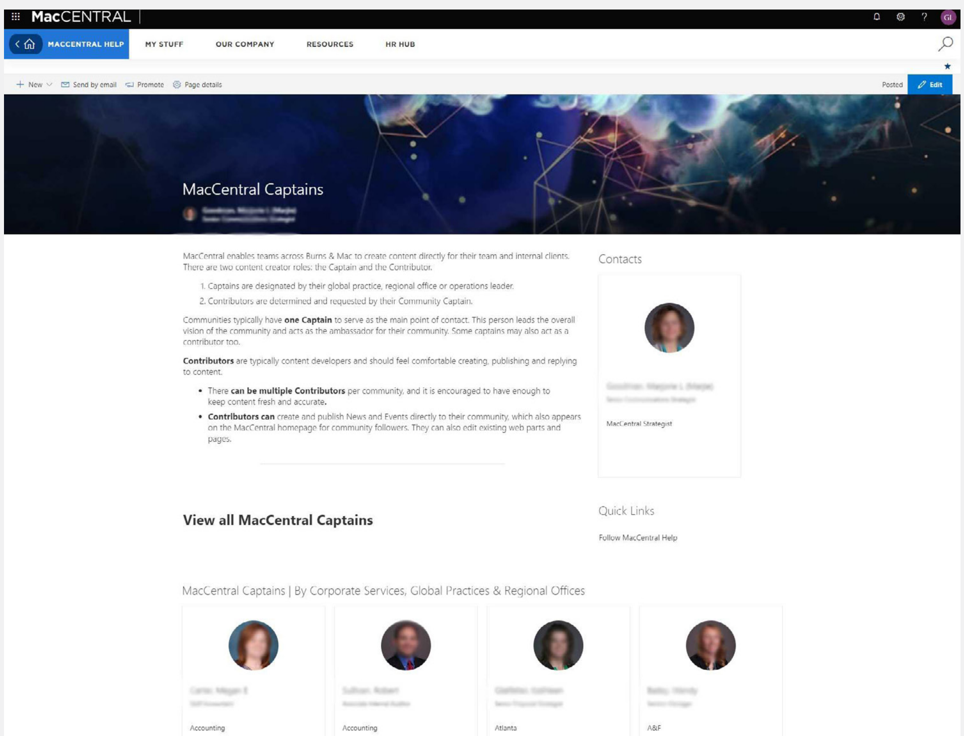
First Solar built its intranet on SharePoint, and it contained many subsites off of the main intranet. Each subsite had anywhere from one to three site owners who were the contacts and point people for the site and content. The team described how they relied on their central design team for user interface and graphic design, but the site owners controlled the content and permissions. Some of the intranet's larger subsites had up to five owners per site, but for the most part, the team tried to keep ownership over the subsites limited to a small, core group of accountable individuals. An intranet team member said:

> "We wanted to control the growth of the sites. People would create them and didn't really need them, but didn't know, so we had a lot of disjointed content. We don't let users create sites on their own anymore. If they are the site owner, they can do what they want on their department pages."

The team at First Solar described how it's not as simple as allowing content owners to appoint new owners when employees leave the organization. To control this succession, exiting site owners have to put in a service ticket to request to keep the teams small and intentionally selected.

Burns & McDonnell also followed a hybrid content-management model, with two main roles associated with its content strategy. Content owners were called *Captains,* and anyone within the caption's team could be appointed by the *Captain* as a *Contributor.* These roles had a dedicated section of the intranet where they could see each other and access training, standards, and answers to any questions about managing intranet content. This was extremely favorable. The roles were clearly defined on the main landing page:

> Communities typically have one Captain to serve as the main point of contact. This person leads the overall vision of the community and acts as the ambassador for their community. Some Captains may also act as a contributor too.
>
> Contributors are typically content developers and should feel comfortable creating, publishing, and replying to content.
>
> There can be multiple Contributors per community, and it is encouraged to have enough to keep content fresh and accurate.
>
> Contributors can create and publish News and Events directly to their community, which also appears on the MacCentral homepage for community followers. They can also edit existing web parts and pages.




*Burns & McDonnell had two main roles associated with its content management strategy.* Captains *were responsible for the overall vision of the content in their respective space and could freely publish news, events, and other web parts on the intranets.* Contributors *could also develop and publish other types of content to the community, specifically in the social spaces, but had limited permissions to edit news, events, and web parts.*

### List the author and owner of any content page and also include their contact information.

**Process and Strategic Considerations**

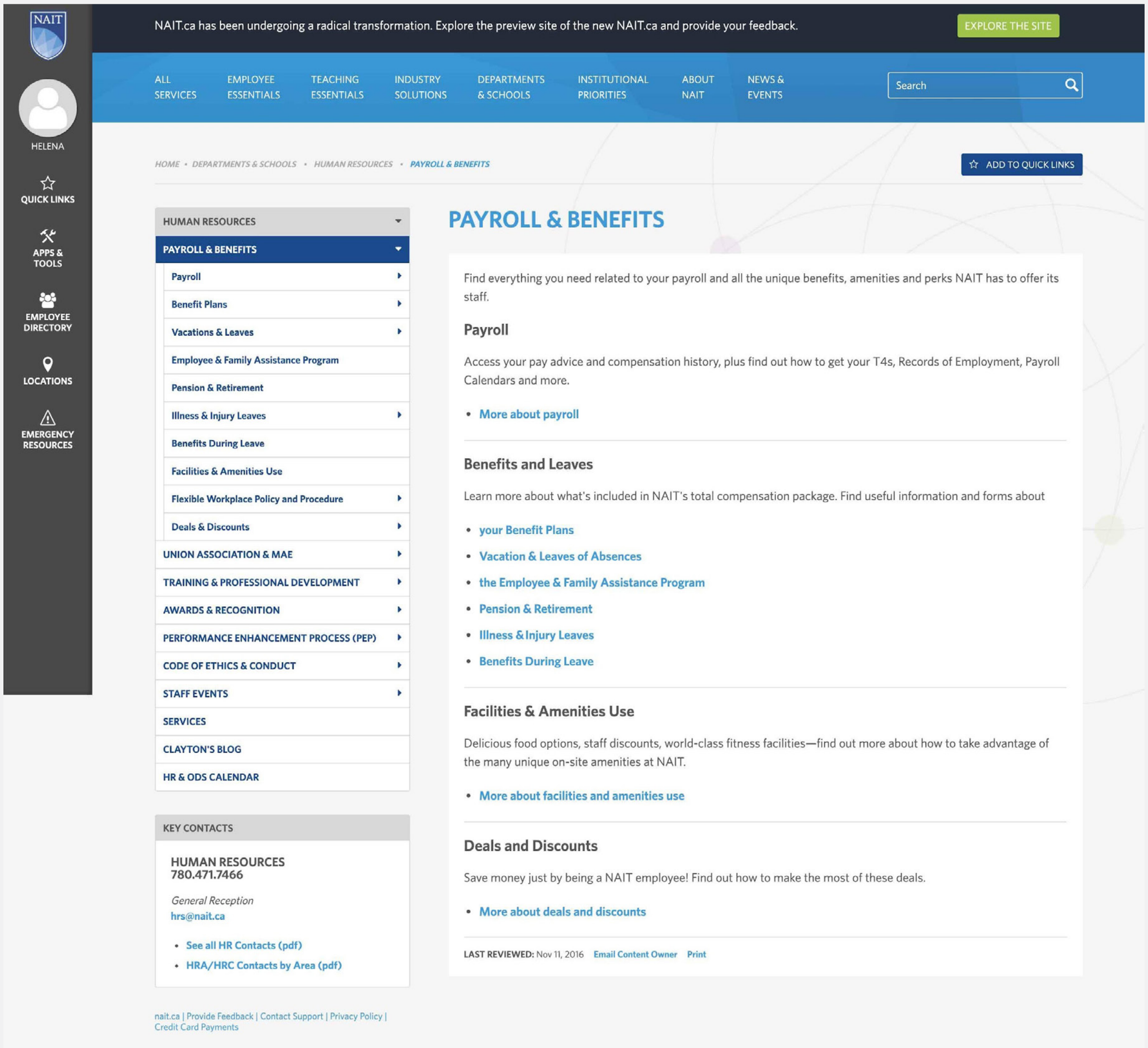
Listing the author and owner of any content page on the intranet (if they're not one and the same) will help to keep people accountable for continually reviewing and updating content so it's accurate and aligns with standards.

Including contact information on the pages also helps to ensure that if employees notice an error or have a question about a specific page, they can contact the owner, contributor, or author to have it corrected.

At DIRTT, content was rarely attributed to an author, and finding out who to contact about materials on the intranet was difficult, if not impossible, to do. During our usability studies, DIRTT employees looked for who to contact about certain pieces of information but were often unable to find who they needed, resulting in many questions about who to contact.

When contact information was available, users said it was helpful and should be included more often. One user said, "Finally I have a contact, but it's only for the writer of this one article."

At the Northern Alberta Institute of Technology, all departments had at least one person who looked after the department's intranet content. The organization did a great job of displaying the contacts' names, phone numbers, and email addresses on each page.




*The Northern Alberta Institute of Technology had responsible individuals in each department to look after the intranet content. Also, the names, email addresses, and phone numbers of those who managed the content were listed on the page.*

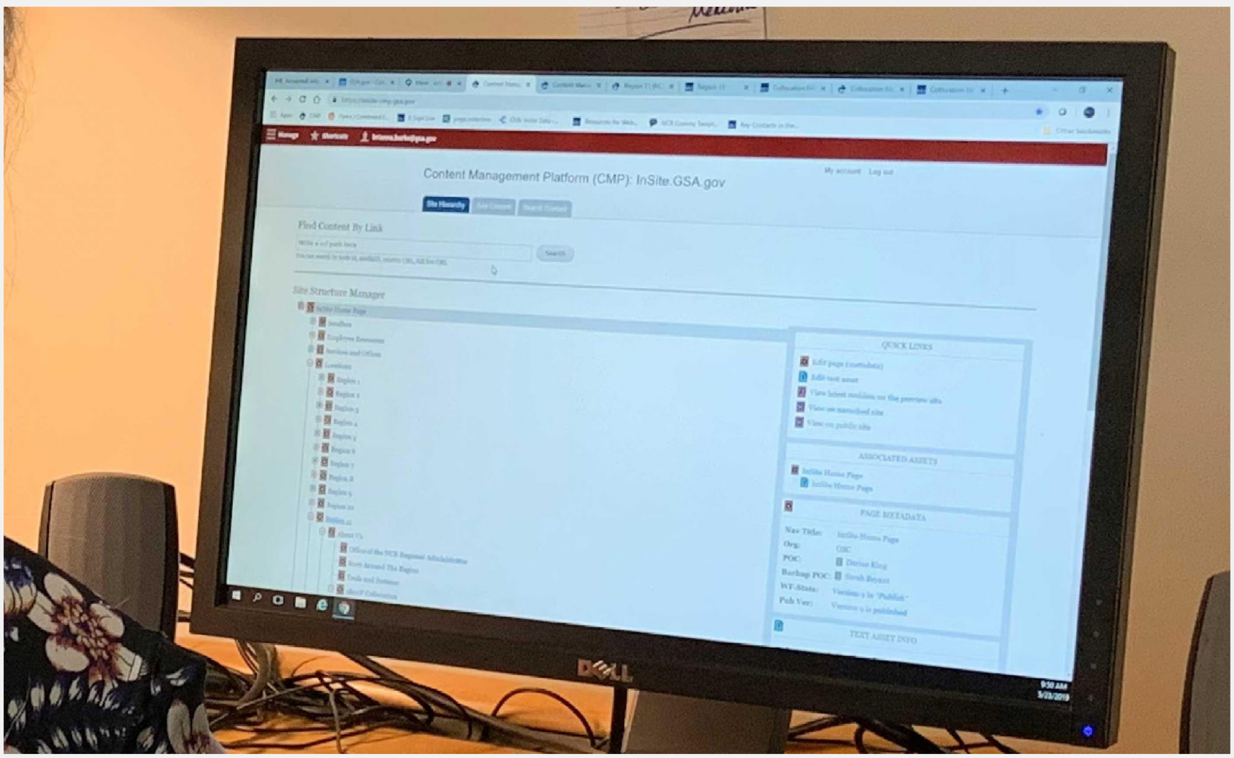
A lack of leadership support sometimes led to blurry ownership and convoluted roles. For example, at the General Services Administration, it was difficult to influence management and change the minds of people stuck in the “well, this is the way we’ve always done it” mindset. The team described how they could see that a page didn’t look good, but people in leadership were insistent on what they wanted. Individuals in reporting roles didn’t want to disobey their managers, so they couldn’t get anything done if they didn’t have editing or approval authority.

Empower properly trained employees to be responsible for their intranet content and hold them accountable. Don’t hold them back from trying to improve the content for the organization’s and their peers’ betterment.

## 62. Ensure forms and page editors used to input intranet content are simple and easy for content managers to use.

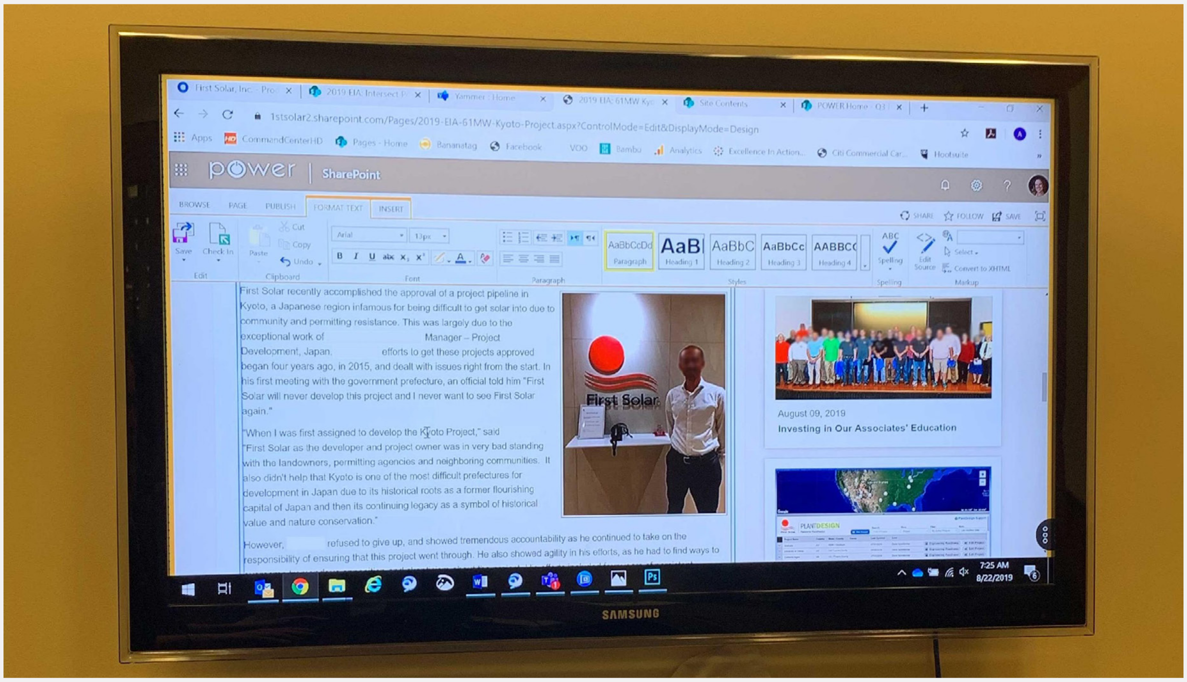
While content creators may be well-versed in their subject matter, they might not have the expertise or time to learn what makes good web content or how to use a content management system. Also, some content providers might add content infrequently, so making content entry simple is important. The less control people have when adding content, the more likely it is to stay consistent and fit well with the intranet's design over time.

The forms used to accept the content must be thorough, explicit, and well-coded while also easy for the end user to understand. This becomes even more important if you follow a distributed content-management model, where anyone across the organization can post content to the intranet.

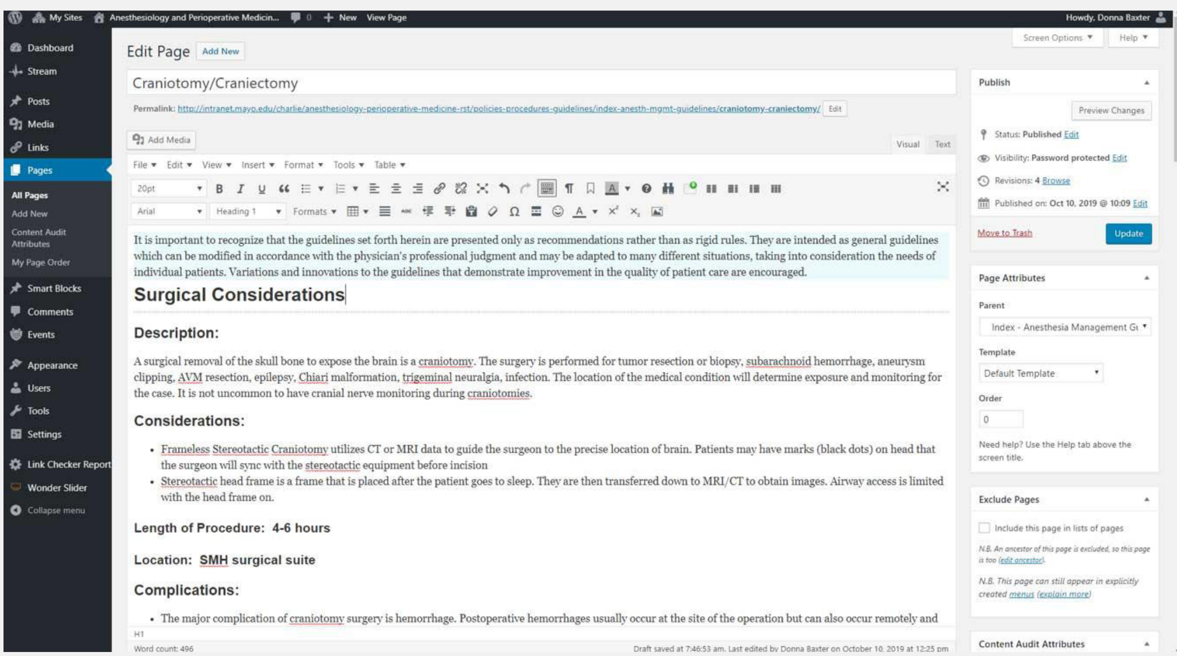



*The General Services Administration's CMS displayed the various pages on the intranet using a nested tree view. This view can work well for some teams if they understand the site structure, but it can also be limiting or difficult to navigate when you don't know exactly where the page you intend to edit lives in the structure.*




*One of the easiest interfaces we observed for managing intranet content was at First Solar. Using a modern version of SharePoint, the content management system mimicked Microsoft Word, a familiar tool for many employees.*




*The Mayo Clinic's intranet (powered by WordPress) also had an easy and intuitive WYSIWYG editor. However, one content manager mentioned she didn't always know what some icons represented without first rolling over them.*

### Ensure content admins have the proper training, permissions, and access in the CMS.

Process and Strategic Considerations

These days, as easy as web publishing has become, intranet content managers shouldn't have to go through developers to update their content. However, they still need to be trained on the CMS, how to write for the web, and the intranet's standards before inputting content. (More on those topics later in this report.)

Ensure content admins and managers also have the proper CMS permissions and levels of access in place to do what they need to do, specific to the role they play in supporting the intranet's content strategy.

At the organizations we studied, sometimes this meant individuals were given admin rights after receiving thorough training and demonstrating their ability to handle such permission effectively. In other cases, some individuals were simply editors; they could effectively add and edit content but not grant others permissions. Consider the roles on your teams and the different access levels they need to be effective.

At the Co-operators, we observed a few challenges content managers faced when trying to input content into the CMS:

1. **Too many prompts to confirm actions:** A content manager complained about how it took many steps to approve content before publishing it to the intranet. They said, "It takes three or four clicks to approve something you want to make live. 'Are you sure?' Yes!" Having to complete this many steps frustrated the user and wasted their time. It's OK to ask users to confirm that they'd like to push something live once, but multiple confirmations are likely unnecessary.
2. **Long forms for adding URLs:** When a Co-Operators content manager added links to a page, they had to scroll quite a bit in the CMS. When we asked them about it, they said, "Yeah, that's kind of annoying because I actually have to use my mouse to go all the way up, and sometimes it takes a long time. That page is actually small compared to some of the pages I update. It is time-consuming."
3. **High interaction cost to check links:** When adding a link, we observed users had to move the cursor through the fields to review it because the whole link was not visible.

**Mark required fields in the forms used to input content.**

Timeless Design Tips

Alongside the CMS form labels, mark the fields required to publish a piece of content with an asterisk. Required fields will likely vary by content type, but fields such as the main title and headline, a short description, date, page title, and meta description are good examples of fields in the CMS that shouldn't be left blank or be optional before pushing content live.

## PLANNING, SCHEDULING, AND PUBLISHING CONTENT

### 63. Establish a calendar or schedule to outline when content will go live on the intranet.

Intranet content managers are often busy people. In ideal scenarios, their only role and responsibilities are to plan for, create, publish, and maintain the intranet's content. More realistically, content managers often have to juggle the duties of their full-time jobs and use any precious free time or additional time they carve out to manage intranet content for their department or team. In any case, having a shared calendar that accounts for the following is helpful to keep everyone informed.

- What content do we need? (to plan, create, and when do we start?)
- What content is coming or in progress?
- What is ready to publish, and when?
- What needs to be reviewed or updated?
- What needs to be retired, unpublished, or moved to an archive?
- Who will ultimately publish it?

### Make sure content can be easily updated without altering the entire content calendar.

Process and Strategic Considerations

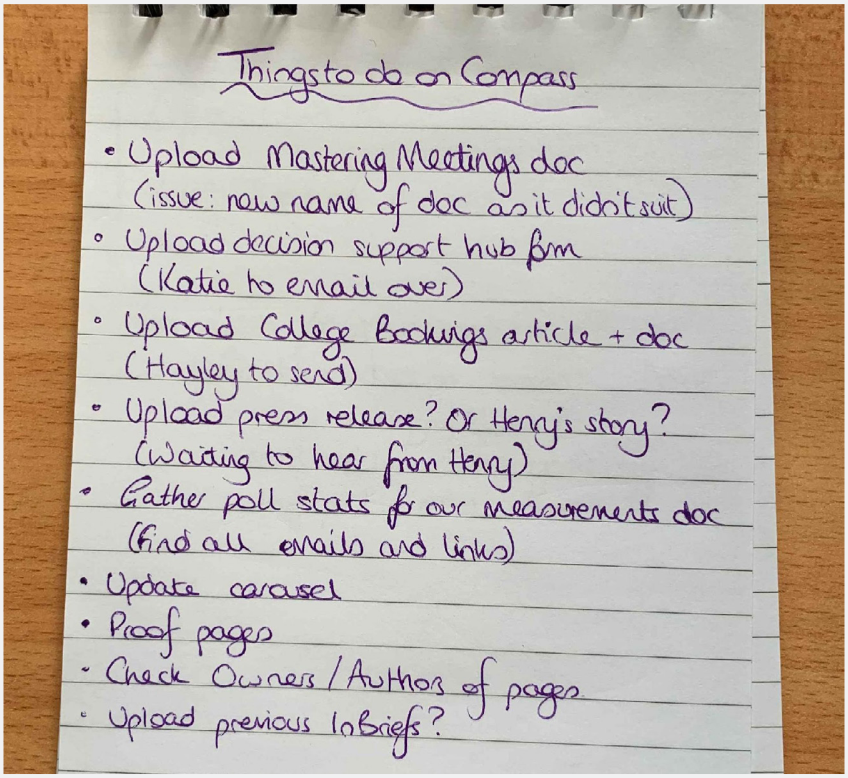
The First Solar team described how after making edits to a piece of intranet content, it suddenly became the "most recent," often causing them to have to perform a cascade of further edits as a workaround. A team member said:

> "Let's say someone found a typo. If I change something from a month ago, it becomes the most recent story. So, then I have to go in and make sure an edit happens in every story so that it doesn't show up as a new story. Sometimes it's fine when I want to make a change to a story, but otherwise, it's something I just know needs to happen."

Content managers are already busy enough without having to remember workarounds like these that the intranet should be able to do programmatically.

It is best to have the content calendar housed in a collaborative tool (ideally linked from or even housed on the intranet) where specific team members can make any necessary changes, notes, or additions. This way, everyone knows what content is coming, what is needed, and who is responsible. Many organizations we studied got into a standard rhythm, where they released new news, announcements, and event content every week and worked with departments and teams to schedule their content if they couldn't publish it themselves as needed.

The importance of a content calendar became particularly evident during COVID-19 as planned content was often deferred and replaced by more pressing content that needed to go live to communicate information about change management and the evolving situation quickly. Ideally, a content calendar should support a team's ability to respond to changing situations like this by outlining processes and documenting escalation criteria, such as what types of content and when new pieces should be published in favor of certain items in the schedule.




*During a field study at the Co-operators, we observed a content manager check her intranet's content planner to see what she needed to work on and publish that day. By referencing that planner, she could effectively focus her to-do list for a more productive day.*

### Pre-schedule content to go live on the intranet as soon as it's ready.

Process and Strategic Considerations

Ensure your intranet's content management system includes the ability to pre-publish or schedule content to go live.

For example, a content manager at the Royal National Lifeboat Institution said:

> "In the news section, it would be nice to have the ability to pre-publish or schedule content. Without that capability, things take a little more time. If something is not up by 10 am, it can't go into the daily news. There's a glitch that if you check it in after that, it may look like it's live to the content publisher but not to the rest of the organization."

## 64. Establish pre-publishing processes, reviews, and approvals that align with your intranet's goals, content-management model, and organizational culture.

The intranets we studied followed different processes for planning, creating, reviewing, publishing, and retiring content. These pre-and-post-publication processes often depended on the resources available on the team, the level of autonomy content authors and owners had, and the content-management model followed by the organization.

At the Mayo Clinic, the content creation process looked like this:

- People requested content through a service desk tool called Remedy. In some cases, requestors did not know what they needed but would try to describe what they were trying to do. Sometimes they requested a spin-off of an existing content type, a new topic page, a department, or a team site.
- Requests were funneled to the team once the ticket was created in Remedy. Three people were involved in responding to requests.
- Requests for changes to the homepage or top-level navigation required leadership review to ensure the request adhered to corporate standards.
- Topic pages and team sites did not require a review process. Appointed individuals within the team could freely change and update this content as needed.

Though the process for submitting a request may have worked to some degree at the Mayo Clinic to protect content in the most critical areas of the intranet from becoming uncompliant, at other organizations, such as KeyBank, this annoyed employees, and one said, "The fact that I have to email to create a page, space, and template is annoying." Crafting these processes in such a way that tailors them to employees' specific needs and also aligns with the goals of the intranet is an important goal.

At DIRTT, content creators wrote original content in Word, and then the content was edited by marketing communications. Then the piece was sent back to the original content creator so they could do a check before it was sent on to graphic design. The content journey didn't stop there. After the graphic design step, it was sent back to the original content creator so they could perform one final check before it was published, which the content creator usually had the power to do themselves as there was no formal approval process for publication.

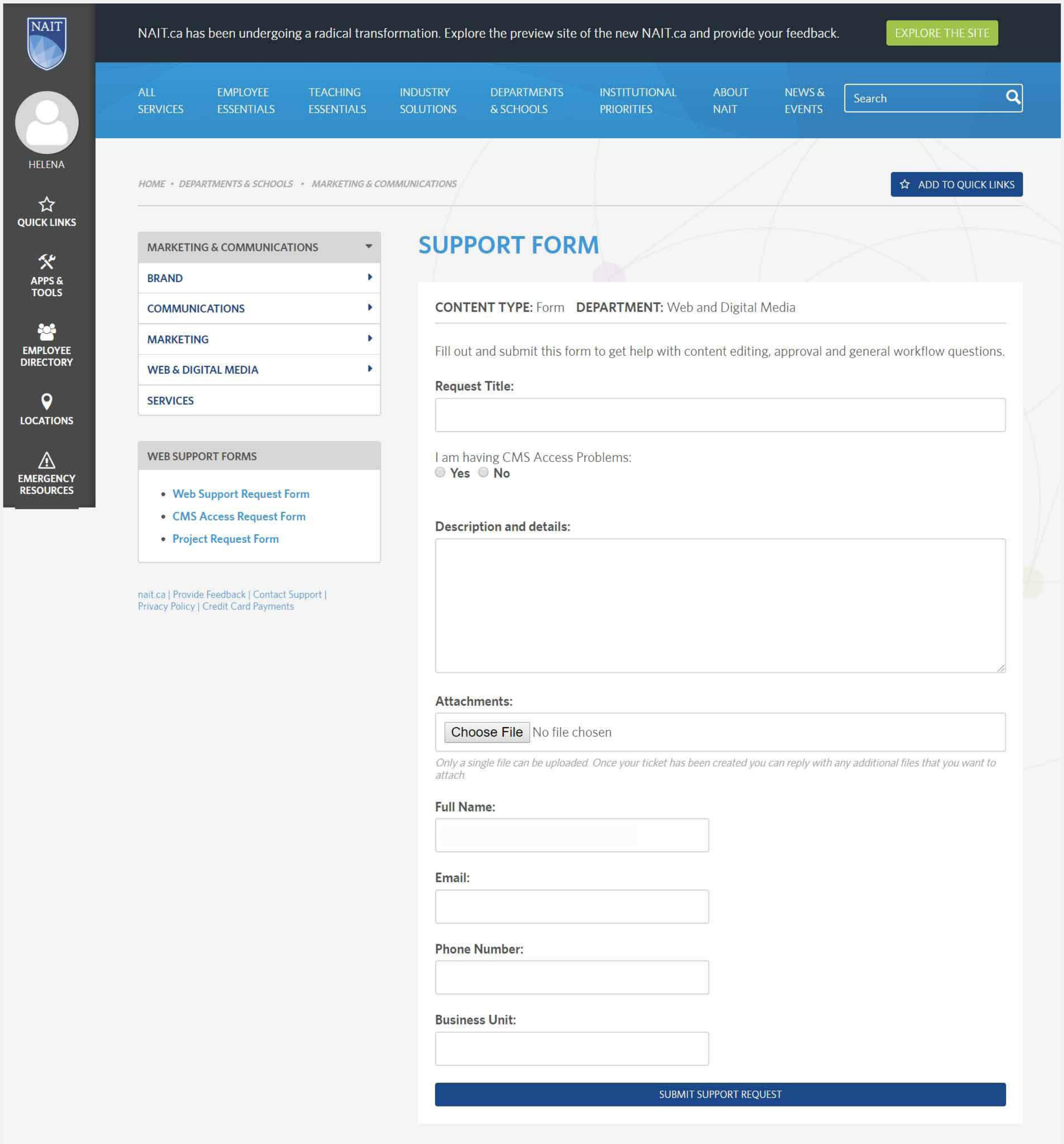
At Atrium Health, its central intranet team took an agency approach to creating and publishing content, where individuals were assigned to specific clients (worthy departments and teams, such as HR). They worked in Sitecore as its CMS and often provided clients a preview in their development site environment before pushing the content live. The team described how clients usually liked what was created but did not always know what they wanted initially. A team member said:

> "They (clients) want *pretty,* but we want it to actually be useful. Sometimes it's a list of links, and they want to put an image on it. We have tried to enforce some service-level agreements, but people always say they need it quickly, so we do it as quickly as we can. It's one thing if you're talking about two paragraphs, but something else if you're talking about creating a video; that's going to take a few weeks."

> "Usually, someone reaches out and says what they want, and by when, and then as their client partner, we say how realistic it is. We'd ideally like to get a Word document with the content our clients want on the intranet, but usually, we get what we despise — someone handing us a PDF and saying, 'Here, put this online . . .'"

At Burns & McDonnell, governance varied, and each community's Captain (content owner) got to decide what needed approval and what did not. Most of the time, people would get approval from their Captain. Content contributors would put initial content in a draft, email their Captain, and sometimes the main intranet team lead, to ask if it's acceptable. One content contributor said, "Since we're an engineering firm, the engineers often send it to me. I make their writing better adhere to our standards, but it's still from them. If IT has something to publish, it goes through an admin approval process involving the caption and contributor."

Similarly, at the Northern Alberta Institute of Technology, some communications staff had dedicated portfolios and supported those clients. These individuals did not create all of the content, but they acted as more of the conduit. Administrative departments had someone from the communications team who was dedicated, and each department usually had at least one person who looked over the department's content in concert with support from the intranet team. Anytime someone (across the organization) needed help with intranet content, they could use a simple support form to get help, which was favorable. This approach seemed to work best and yielded some of the nicest intranet content we observed during our studies.




*Employees at The Northern Alberta Institute of Technology used a support form to request help for creating, updating, and publishing intranet content, which was highly favorable. The form was easy to use, and requests were often responded to promptly.*

### Establish a single source of truth to help root out duplicate content and discrepancies.

Process and Strategic Considerations

As part of your planning and pre-production processes, **watch for duplicate, redundant, or similar content** making its way onto the intranet. When this happens, the intranet becomes overloaded with content, making it difficult for employees to locate the needed resources. They also spend extra time deciphering between duplicate or similar pieces of content, wondering which is accurate, current, and contains the necessary answers or information they seek. This often manifests in places such as search results pages, landing pages, and in the navigation when there is too much duplication.

Try to **make content modular** and adaptive as much as possible in your processes. Doing so means you establish a single source of truth and identify one place to update the content, and then it cascades to all other areas of the digital workplace where it needs to display. When developers and content managers must maintain information in more than one place, the content will likely become out of sync as people update one version but not another.

**Duplicate content also creates duplicate work**. Different teams or individuals should not spend time creating the same information in different ways. If the content is similar (but not the same), it should be cross-linked, but this requires teams to create, check, and maintain more links.

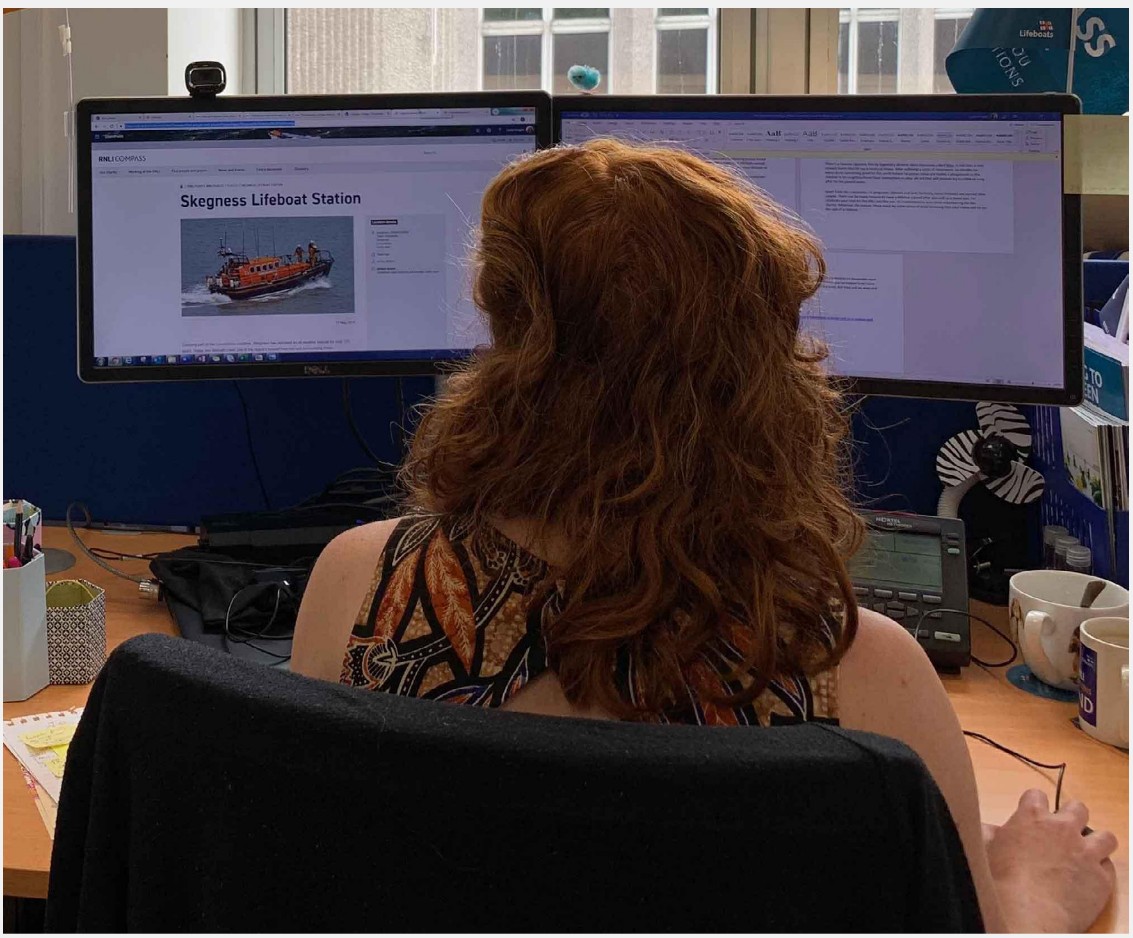
If the information seems close enough to what they are looking for, users will assume they have found all they can, even if it is not exactly what they need. Users will not keep looking in other intranet sections to find an ideal version of what they have already found. They will just think the exact information they want is missing from the page.

The more information on an intranet, the more potential for clutter. Thus, users will have more trouble finding information, so consider all these elements when planning your processes.

The General Services Administration had a distributed authorship model across its offices. The central intranet team did not express ownership over the content. One member said:

> "Once authors are trained, they can manage and create their own content; there's no approval process, and authors don't need approval from us to publish. The intranet team can create the top two levels in the navigation, and then distributed authors can control the rest. For template changes, they send an email to our group inbox; if they want to create a child page under a locked page, they need approval."

The internal communications team at the Royal National Lifeboat Institution managed and often wrote the intranet content. They sometimes worked with another individual to write the content, but they were always the ones to publish it. The person who knew the most about the topic covered in the content was always the author. This was also one of the more optimal approaches we observed, which yielded high-quality intranet content. The hybrid and centralized content-management models also correlated with faster task completion times and greater success rates than the distributed content-management model.




*A member of the intranet team at the Royal National Lifeboat Institution works on creating and publishing a piece of content to the intranet.*

## 65. Enable content managers to easily copy and paste content into the CMS without needing to massively reformat the content.

While observing intranet content managers upload and update content throughout our studies, one of the most prevalent themes that emerged was that most, if not all, had to copy and paste the content from either a Word document, PDF, or Google document to get the content into the CMS. Rarely were content managers observed directly typing content into the CMS unless it was a minor edit.

This task cut-and-paste process usually slowed content managers down because they had to strip out any formatting in the native document and then reformat it in the intranet's WYSIWYG editor to get it to look right before publishing. Some content managers manually retyped the whole document or article and then manually styled the elements to make them look right. Others copied and pasted the content into a plain text document before copying and pasting it to the intranet and manually styling it within the CMS.

A much better approach in all of these cases would be to standardize the format in which raw content is created, for example, in a Word document, and then provide the ability within the CMS to either upload or copy and paste the document allowing specific styles to transfer intact, such as those for main headings, subheadings, links, bulleted lists, etc. This capability would also reduce the need for content managers to undertake lengthy workarounds, such as having to duplicate past posts to get the formatting to look the same across pages.

At First Solar, content managers often received pieces via email or Word documents. The Word documents typically had comments or callouts outlining what needed to be changed. In one case, a content manager was just changing a heading, but even with this seemingly simple task, she paused to reread the comment to try to clarify what she was being asked to change.

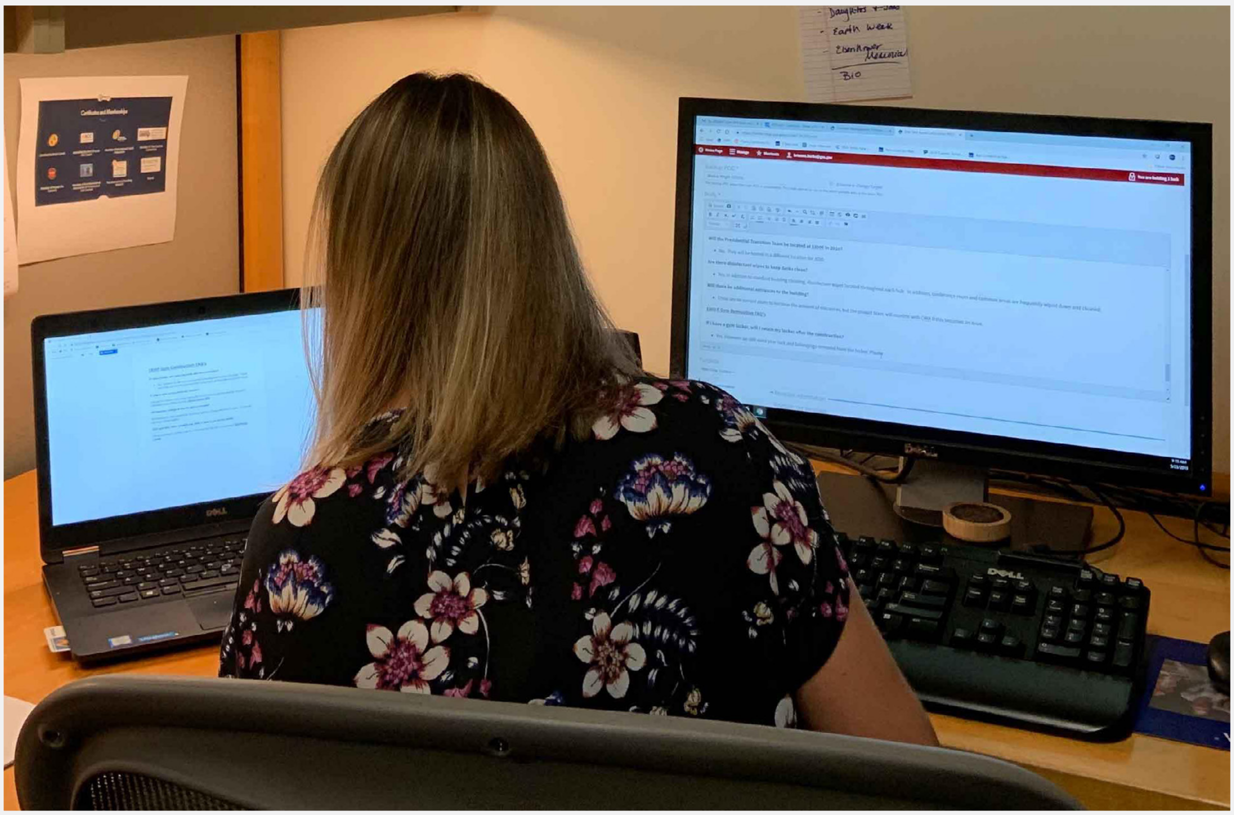
Another content manager at First Solar was trying to add a link to a page of content she was updating in the CMS, and after copying and pasting the link from a document, nothing displayed in the text field. She decided to publish the piece, anyway, thinking she could edit it to add the link. While she was showing us her process, she realized she had added some of the dates listed in the piece incorrectly (not in reverse chronological order), so she created new rows and began moving text around — more copying and pasting. She pasted the date in international format into the CMS and said, "Ah, I did it again!" Then she opened Notepad and pasted the raw text in "18 Septembre 2019," then copied and pasted that into the CMS. She followed the same process for the title and link, with much more copying and pasting to follow. The process was far lengthier and more involved than it needed to be. The intranet should have just accepted the formatting she was trying to apply.

At the General Services Administration, we asked a content manager why she was typing new content in the content management platform (CMP) rather than copying and pasting it. She said, "Unfortunately, I can't copy and paste. You *can* copy and paste, but there's often problems later. Formatting tends to be off."

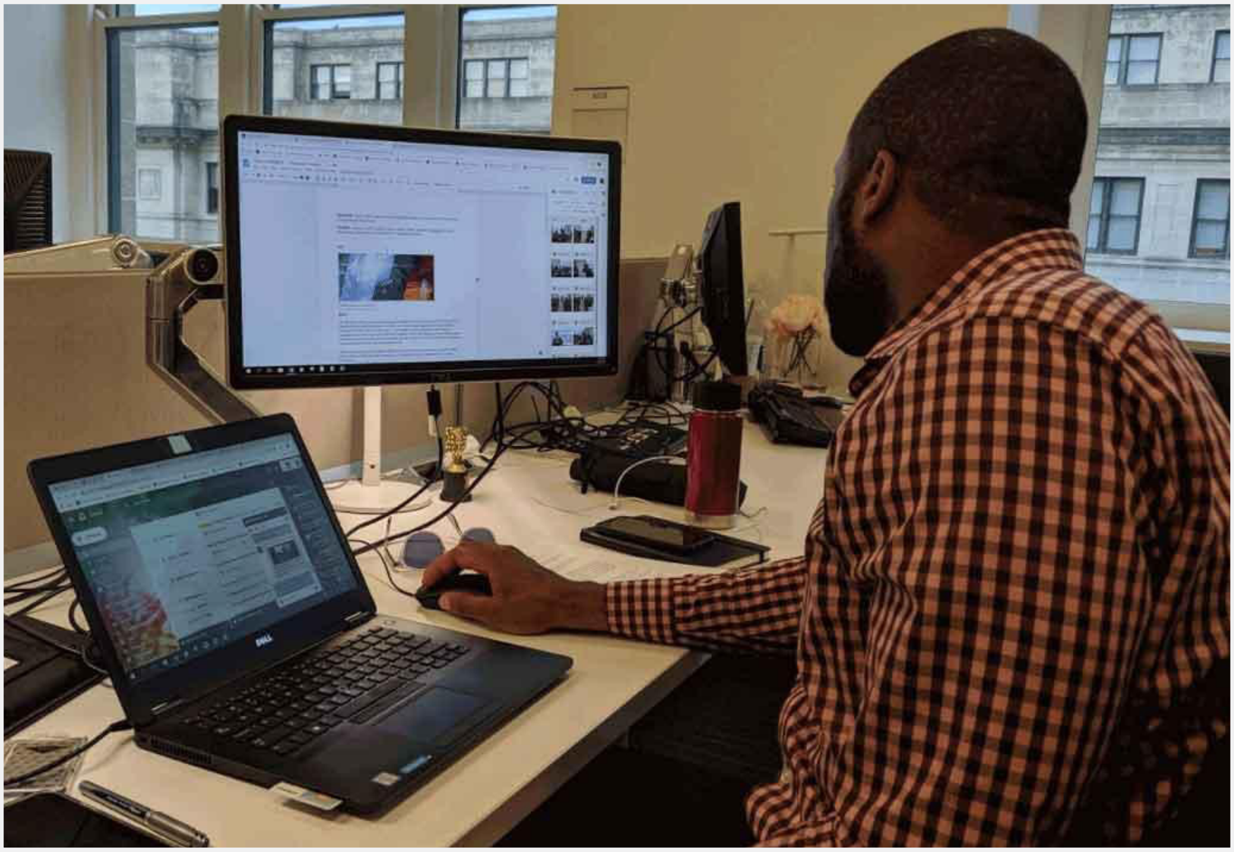
The raw file she was given was a Google Doc rather than a Word file. She said she would have to download it and strip all the formatting out to copy and paste it directly into the CMP, then continued:

> "It's faster for me to type out something than to unformat everything. I can type fast and edit quickly, so it is faster to do that, than copy and paste. The CMP has two views — the Word document view and then the HTML view — and HTML reads the Word view. It might look correct on the preview page, but when it goes live, it's not right."



*A content manager at the General Services Administration retyped an entire article into the organization's content management platform, saying it was easier for her to do it this way than to copy and paste it — because she'd have to go in and tediously reformat all of the content to get it to look right on the intranet when published.*



*Another content manager at the GSA referenced content from a Google Doc while preparing to input it into the content management platform.*

### Make it easy for publishers and managers to revert to previous versions of content.

Process and Strategic Considerations

Ensure content managers can revert to a previous version of the content, even after saving changes. Additionally, certify the changes they make to the intranet have been saved.

While observing a content manager at the Co-operators, a page she was updating froze while she was explaining her process to us. This caused her to lose all the changes she had made just minutes before.

When asked how often this happened, she replied, "At least once a day. This is what happens whenever I start the process. I get this error if I'm working on a page for a period."

When we asked her if she typically loses her changes, she said:

> "We'll see. It did save my changes when I was there, but it takes away the time that I could be doing something else. When I've been working on something, sometimes I will get an error related to technical difficulties, or I'm trying to get back into a site that I've been working on. When that happens, and I cannot get back, well then I give up, and I go for lunch!"

Automatically save content managers' progress and make it easy for them to revert to previously saved versions.

At the Co-operators, we asked a content manager to tell us who or what instigated changes to intranet content. She described how she usually converted documents to PDFs to add them to the intranet. From our usability testing with employees, we know PDF is a suboptimal format to display content on the intranet unless people plan to print out the information. This content manager's lengthy process of copying and pasting content from raw documents into Notepad to strip out the formatting, then pasting the content to the intranet was also inefficient. During an interview, she said:

> "Normally, we get a Word document or an Excel spreadsheet containing the change request. Sometimes it's a PDF. For anything that I link to from the intranet, I will convert it to a PDF. Unless it is a spreadsheet, then I will post it as a spreadsheet. Because I am in SharePoint, I must copy in Word and paste it into Notepad to take out all the coding and stuff before I add it to the intranet."

During a virtual contextual inquiry with a content manager from Burns & McDonnell's Dallas office, we noticed from her screen share that she was doing a lot of manual copying and pasting to update a piece of content about employee anniversaries and birthdays. To manipulate the content, she duplicated posts that were like what she wanted to do in a Word document so that she didn't have to recreate difficult tables in the CMS. Then, she copied and pasted the tables into the CMS.

Instead of requiring a bunch of copying and pasting, manual unformatting, and reformatting, ensure the CMS can quickly support content managers with these tasks.

Another thing we noticed during this session with Burns & McDonnell's content manager is that she did not preview the content before publishing it to the intranet to ensure it looked right, met standards, and was without issues. Previewing content before publishing it should be considered a best practice.

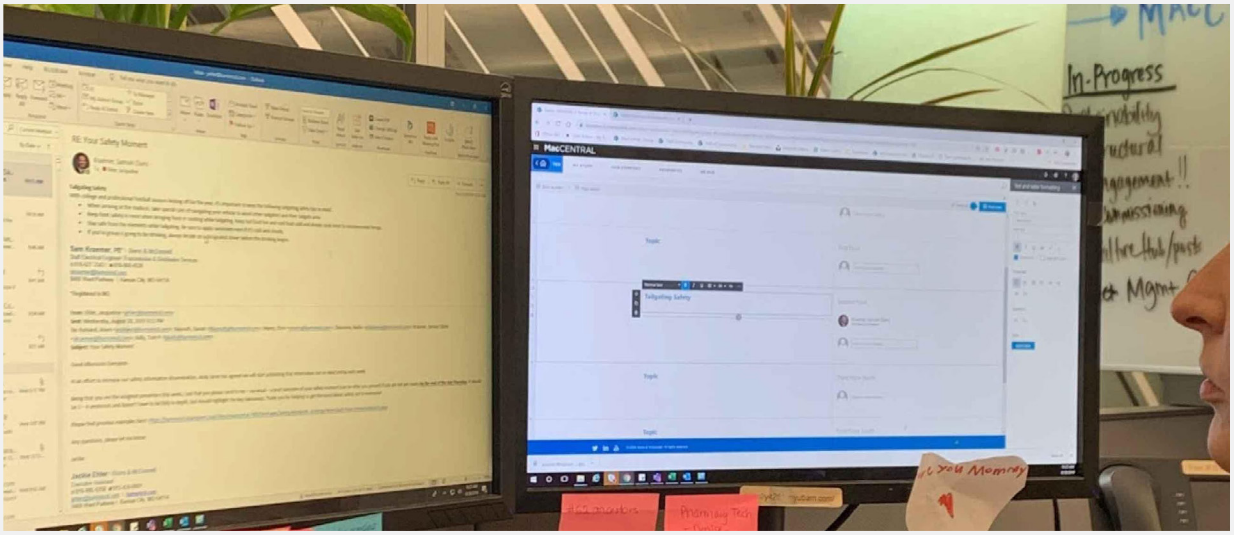
**Encourage content managers to preview content before publishing it.**

Process and Strategic Considerations

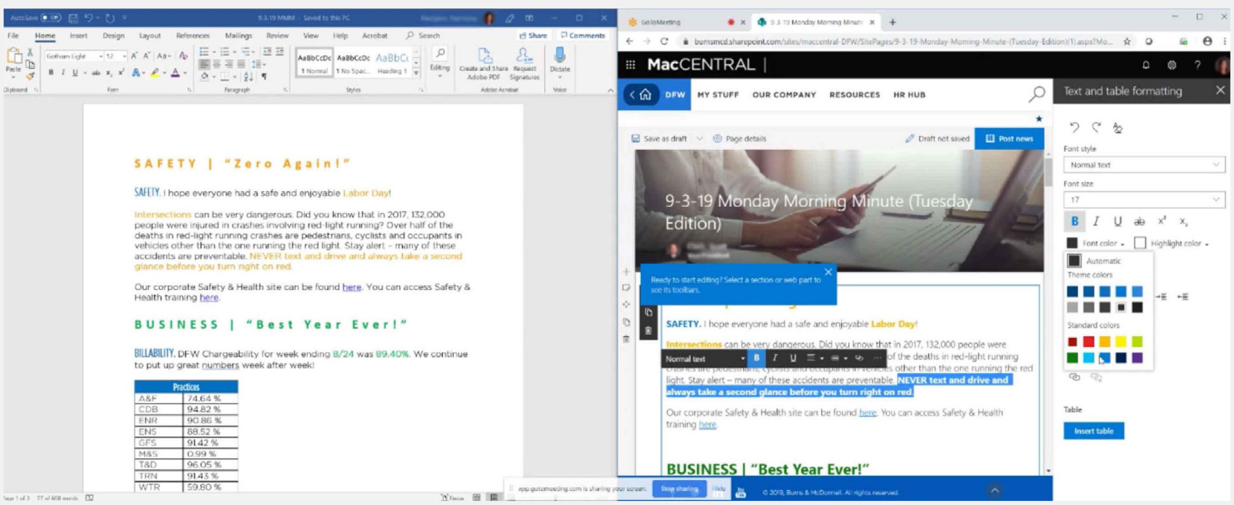
Though managing intranet content may not be the most important task on a given employee's to-do list, it's still important that they not rush through content updates to the point that they forget to preview what the live content will look like before publishing.

Set the expectation that content managers are held accountable for previewing content and, ultimately, what the content looks like once it's live.

Taking a moment to do this means they will be more likely to catch any errors before the content is published and will save both content managers and employees time and trouble in the long run.




*At Burns & McDonnell, a content manager referenced an email request for content and used a second monitor to input the information into the CMS.*




*Previewing intranet content before it goes live will ensure text is properly formatted per intranet standards and that it is accessible and error-free.*

## 66. Create an organization system for images and other content assets so publishers or content managers can easily find and use them.

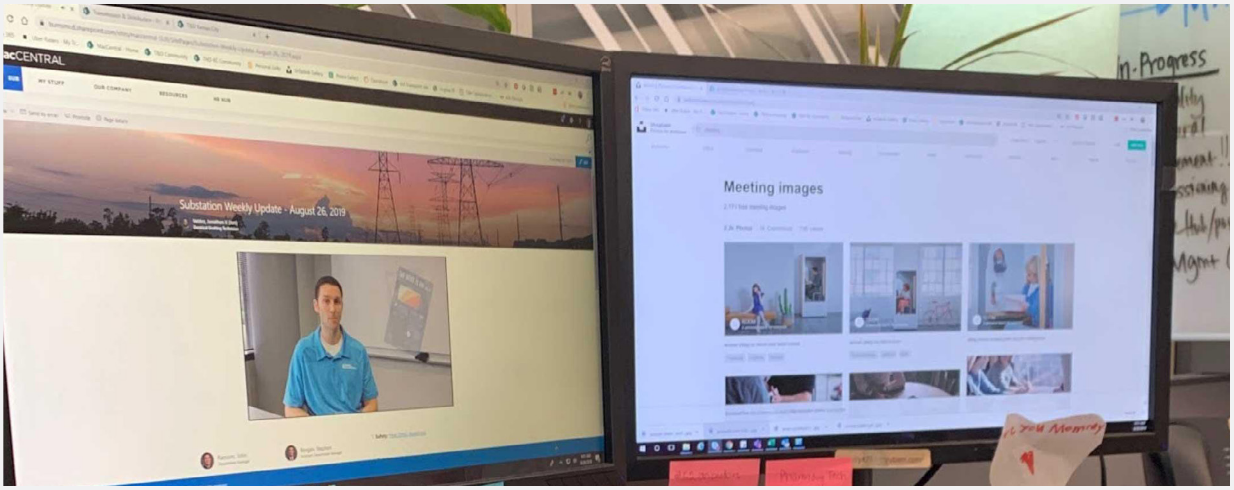
In addition to written content, using images and graphics on the intranet can help reinforce the key messages contained in the text. When choosing graphics for the intranet, it is important to communicate, not decorate. Rather than using placeholder images, try to find meaningful imagery.

Because content managers often deal with graphics and written text, keeping image libraries or imagery-related processes easy and efficient is important. This will enable content managers to spend more time optimizing the written content, which employees more often rely on to get the answers and information they need.

The content managers we observed acquired imagery for the intranet in a variety of ways, including:

- Images created by the organization’s marketing department or a dedicated graphic design team
- Snapping photos (or videos) using smartphones
- Stock photos and royalty-free websites offering stock-like photography, graphics, and icons
- Social media (with permission from the original posters)
- Creating the images themselves (though if the content manager lacked graphic design skills, this was often a less than optimal approach, which resulted in content looking unpolished and unprofessional)

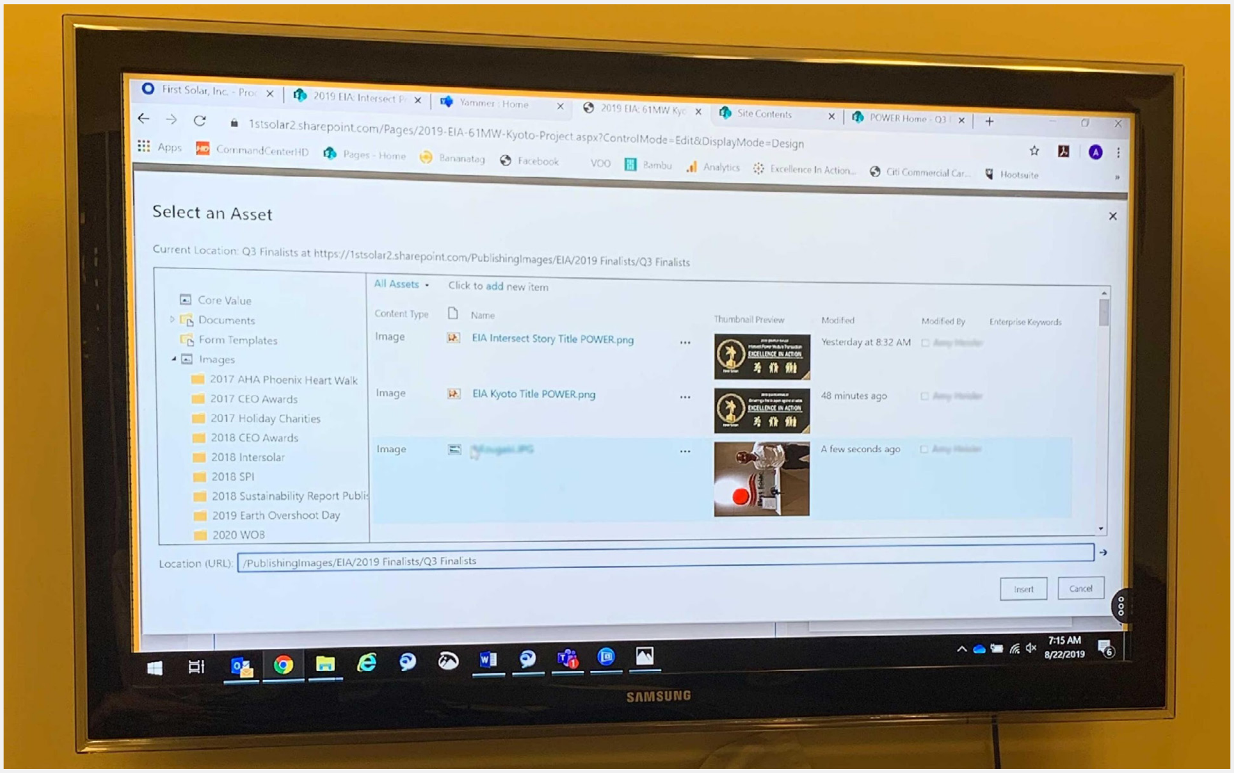
We observed a content manager at Burns & McDonnell as she was preparing to catalog photography used on the intranet. She looked for royalty-free images on a website called Unsplash, where she could search for keywords and find a wide variety of high-quality photographs to use in the content. She also pulled from an internal library of images and photos created and taken by individuals within the organization. While looking through these disparate sources for appropriate images, she said, “We need a more consistent set of naming conventions and ways of organizing these.”




*A content manager at Burns and McDonnell recognized that having a more efficient way of naming and cataloging images would have sped up her duties.*

A content manager at First Solar also described how a lack of organization with images slowed down her work. She said, “When images are uploaded independently, they float out there and don’t have a home. If I need an image again, it’s impossible to find it. Often, I can’t find it again to use it for something else if I need to.”

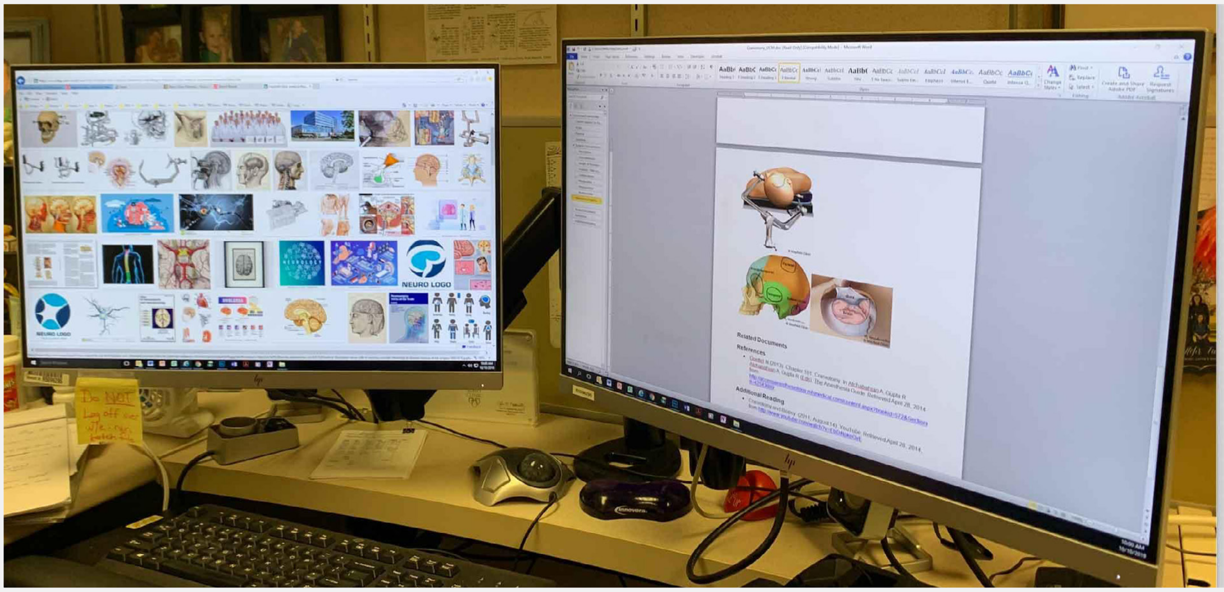
Organize images and other content assets to make it easy for content managers or publishers to find and use.




*A content manager at First Solar complained of the difficulties she faced as she tried to keep track of the various images used across the intranet.*

Proper naming conventions are critical to any useful organizational system for intranet content assets. A lack of clear and consistent naming conventions and standards for images on the Mayo Clinic's intranet forced one content manager to do reverse Google image searches to determine where images originally came from. She did this so that she could properly cite them within the policy documents she was updating. In one case, it took her over 30 minutes to figure out where an image came from because no one informed the medical providers that they needed to cite the images they used in their content properly. Had there been standards for naming conventions, including the source and a coherent organization system for images, this content manager would not have wasted significant time trying to find where the images originated and resided.

Also, the content manager had to use Word to properly resize the images before including them on the intranet.



*An intranet content manager at the Mayo Clinic wasted significant time doing reverse Google image searches to find and properly cite images used in policy documents. She also used Word to try to resize the images alongside the content before copying and pasting it into WordPress. It would have been better if she could have done this directly in the CMS instead of Word.*

A content manager we observed at the GSA mentioned there were four options for displaying images on the intranet: small, medium, large, and fixed dimensions. She said:

> "With fixed dimensions, the system will figure it out given the space constraints. Sometimes it is wacky, and it ends up being enormous, and the image itself is not even that big. You click small, and it should post that way because of the size I've saved it to, but it compresses it to a tiny thumbnail versus a viewable picture."

She went on to explain that she often only gets the picture to the correct size through trial and error by going into Paint and resizing it numerous times:

> "A lot of times, I have to edit an image in Paint to get the photo right. Sometimes you end up choosing a different picture or deleting it altogether. Last week, I uploaded a picture that would have added a lot to an article. But I spent about an hour resizing it to get it to sit on the page. It should take five minutes, but it does not, so I gave up. It just would not crop. Another thing that is a bit of a nuisance is the space (padding) around the pictures. There is a lot of white space. This used to be fixed to the picture, but it's just dead white space."

### Provide training on image handling.

**Process and Strategic Considerations**

In addition to training content managers on how to properly format written content, train them to deal with images. Provide training and guidelines on how to organize, resize, format, and generally deal with images used in intranet content.

### Always include image ALT text.

**Timeless Design Tips**

Image ALT text resides in the HTML of the page and is meant to describe what image-based content is communicating. ALT text helps employees who rely on assistive technologies, such as screen readers, but that's not all it does.

Including ALT text on images improves the user experience, making it more inclusive for these individuals, but it also helps relevant images and graphics and the page they live on rank more favorably in the intranet's search results.

## TRAINING CONTENT PROFESSIONALS

### 67. Train writers and content creators on an ongoing basis.

Too many organizations just train content creators, managers, or administrators on *how* to use the CMS, or, even worse, they provide everyone with admin access and then fail to follow up with them to find out if they can access and correctly use the system.

Training should include how to use the CMS and write good copy and properly lay out pages, hopefully, all of which is documented in your content standards. Templating goes beyond the header and left navigation; admins must also learn how to properly use intranet components to house in-page content.

Burns & McDonnell had some of the most comprehensive training resources for its intranet content managers. An entire intranet section was dedicated to training and ramping up new content for this community. This space provided content standards and a checklist they could use to plan and build out their communities. The checklist outlined specific tasks the new Captain had to complete weekly, including meeting their team and planning to prepare content. This structure helped ensure new Captains could complete the training when it best fit with their schedule. A video recording of a content prep workshop also helped guide new content managers through everything they needed to know to be successful in their role, including:

- CMS training and permission clarifications
- Information architecture levels and URL structuring
- How the planning, scheduling, publishing, and retiring processes worked
- People and team roles and responsibilities, review expectations, and necessary approvals
- Writing for the web and accessibility best practices (find these foundational guidelines at the beginning of this report)
- Guidelines on how to write effective button labels, link text, headings, and subheadings
- Metadata and topic tagging training
- An overview of the IA and where specific content lives
- Formatting and design best practices for templates, images, graphics, and ALT text


*Burns & McDonnell had an impressive array of self-service training materials available for its content contributors' community.*

## Provide Training on How to Use the CMS

Ensure content managers understand how the CMS works before managing and publishing content. A few content managers we observed were unsure of how certain parts of the CMS fit together and how the system was structured. This lack of knowledge led to some guessing and haphazardly posting and classifying content. For example, one content manager was unsure how

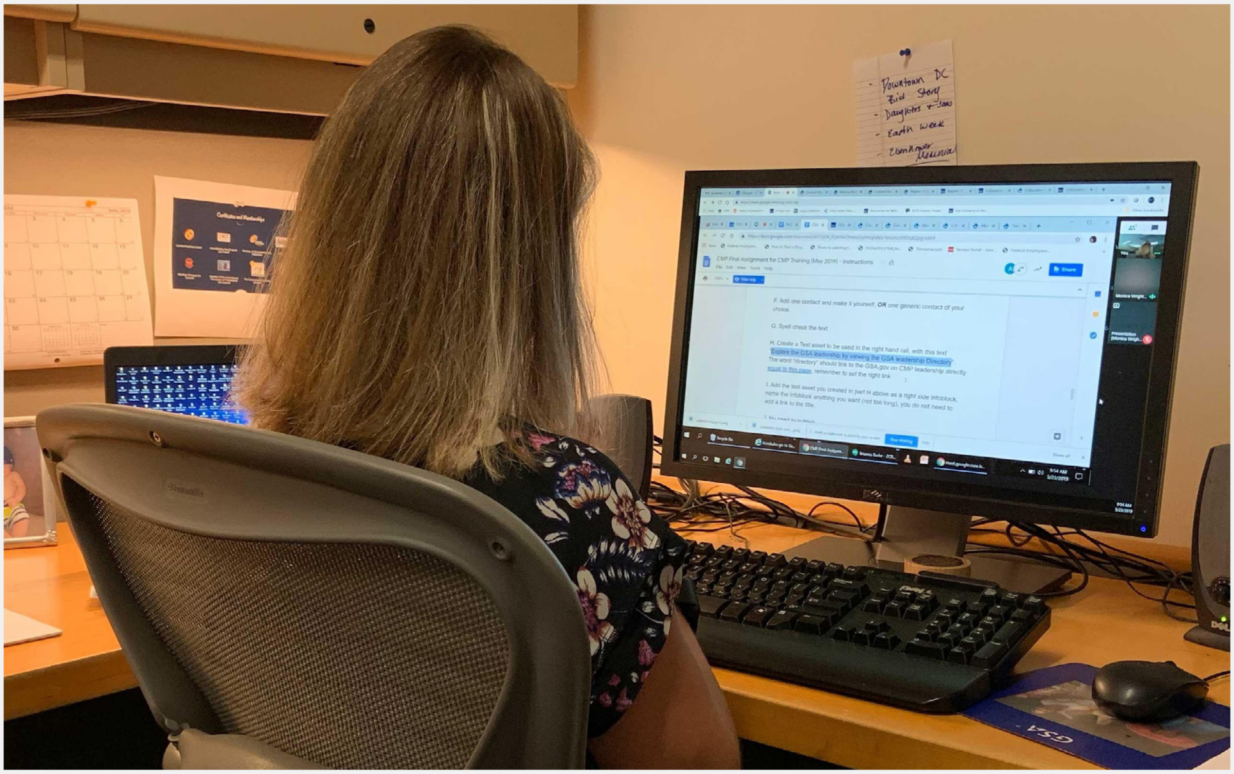
OneDrive, SharePoint, Teams, Yammer, and spaces displayed in her local system drive were (or were not) connected and synched with the content she saw in the intranet's CMS. In another case, a content manager wanted to create a personal space for her team but said she had no idea how. She saw a *create* button in the top right of a screen, which took her to a blank page for a personal space. She expected to see a template, so not realizing it, she was accidentally editing a live, existing page about how to create a personal space.

At NAIT, individuals completed Kentico and SharePoint training first. Approximately once a month, one person conducted a training focused mainly on the posting process. Intranet team members described how the training gave content managers confidence. However, right after launching the intranet, people waited a week or so before figuring things out; they felt like they could not touch it yet.

The GSA used live examples of good and bad content when training its content managers, which was beneficial. Seeing concrete examples helped them understand what was eye-catching for the wrong reasons. If your intranet does not yet have these types of examples, consider creating some training or providing some best practice examples for content authors to ensure they write content that is easy to scan and understand.

The GSA conducted training with content creators or others who had access to the CMS. These trainings were conducted for two hours per day, three days per week, for two weeks. On the first day, the training covered editorial standards and how to write using plain language. Then, on the second day, it covered more technical parts of the CMS and governance topics. Classes usually included 12 to 16 people at a time.

After the training, participants had to pass a test before they could get into the CMS platform. To pass, they needed to be able to insert an image, create a link, add ALT text, and build a page according to how it was supposed to look. Admittedly, some people did fail the test, even after participating in the training. Most people were computer savvy, but some were not. Some people did not even know how to open a new browser window yet had been given clearance to edit the intranet.



*We observed a GSA content manager completing training for her new role during our studies.*

Bracknell Forest Council took a more informal approach to its intranet publishing training, which can work well for smaller organizations with fewer content owners and managers. These informal sessions were usually one-on-one in a conference room, with just a trainer and someone who needed to publish content, which they brought with them to learn how to get it published. During one of these sessions, an intranet team lead said:

> “We’ll do a broad overview of the intranet, leaving it at a pretty high level. We usually do an hour session with the individual and then have them work through their content on their own. They can always call us if they have issues.”

### Provide Training on Content Enhancements Such as Tagging and Metadata

Be sure any intranet content training program includes education on backend nuances that support good content, such as topic tagging and metadata. We noticed these areas were often less emphasized and accounted for in training than user-facing content elements. However, without these, the content could not effectively show up in search or display other relevant resources nearby. At the Royal National Lifeboat Institution, each page had a set of tags used to populate a list of related documents. When people created new pages, they were also responsible for tagging the content. Tags worked well at this organization because internal communications individuals (who were properly trained) were the only people who added content; thus, they knew how to use the tags.

In contrast, a content manager at another organization said, “Topic areas? Hmm . . . I don’t use those, but maybe I should?”

RNLI’s self-publication model means people in different job roles publish content, even those who may not understand how to markup content in a way that makes it accessible and readily available for search.

**Ensure content managers enter coherent metadata for every page of content.**

Process and Strategic Considerations

Throughout our studies, we saw content managers leave critical metadata fields blank as they entered content.

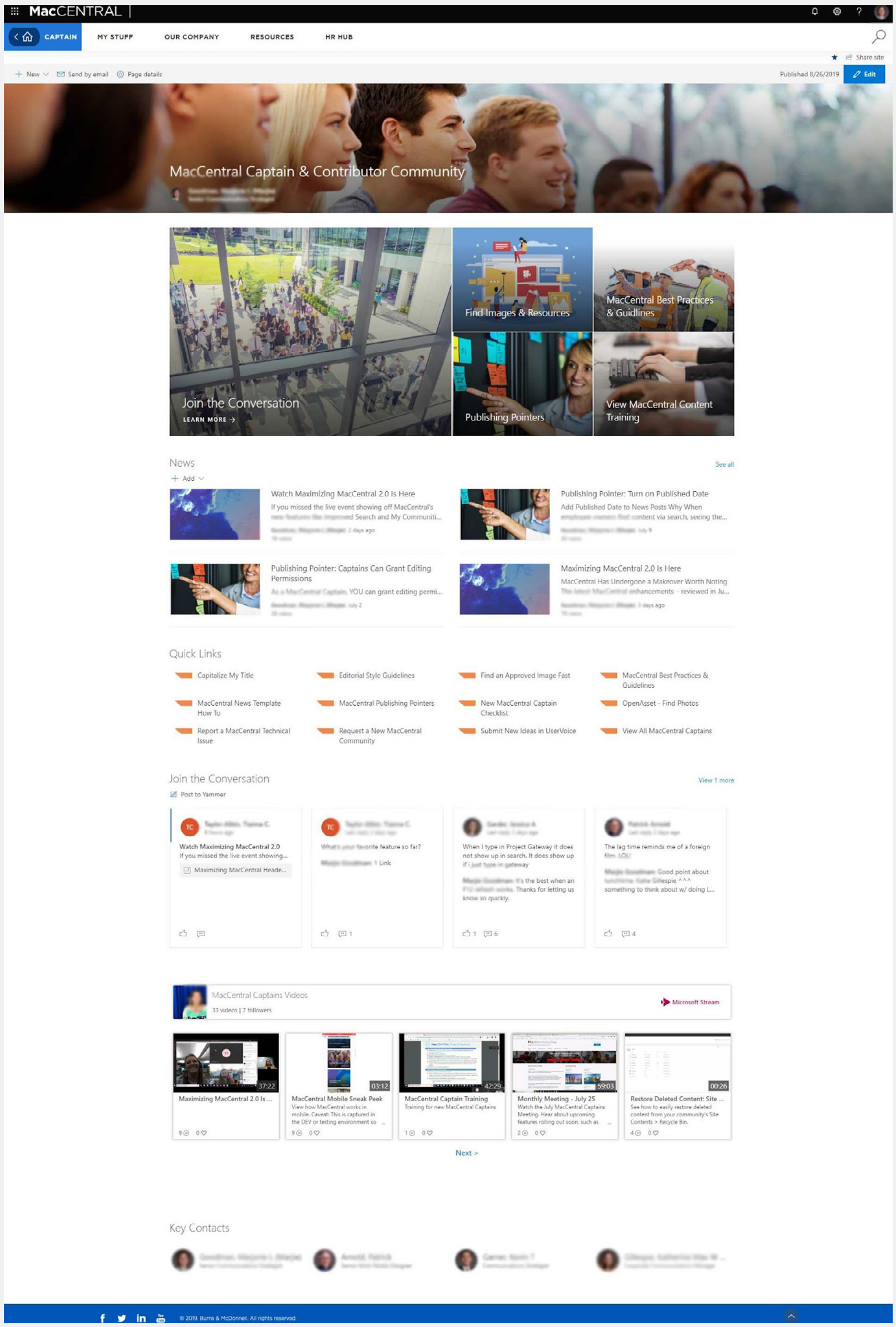
Provide training so content publishers know which metadata fields are critical and help them understand why. Without complete metadata, the content risks ranking unfavorably in the intranet’s search engine results page. Intentionally entering coherent metadata is critical to remedy this issue.

## 68. Provide resources and support on the intranet for content creators, publishers, and managers.

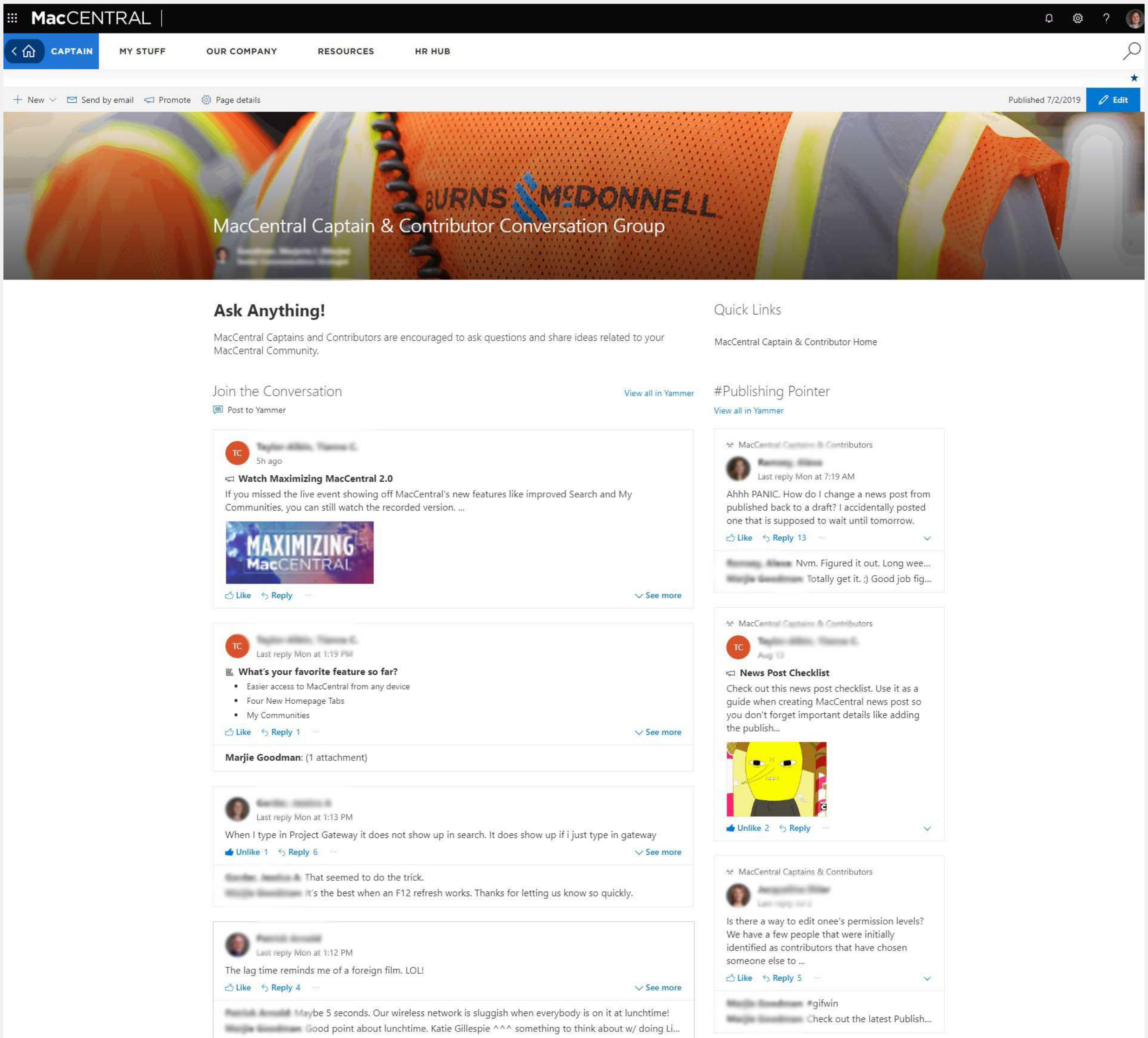
The best intranets provide the right information and resources to support content managers directly on the intranet instead of forcing employees to look in another digital workplace tool or resource to find answers to their questions. The primary consideration when providing any training or support resources is to prioritize the right *types* of details rather than overloading content managers with an abundance of content that is not helpful. Conduct observational research with your content managers to understand their questions and the type of support that would best serve their needs.

Burns & McDonnell had an entire community on its intranet dedicated to supporting content creators and contributors. This space was created to communicate with them and show how content should look once published. Best practice and guideline documents were available in a variety of formats, including as a web page and a PDF, for any content managers who would prefer to print them. There was also an expansive series of how-to videos created through Snagit, which feature screen recordings with voiceovers. The team used these for strategic positioning to emphasize why content managers needed to do something a certain way. At the time of our research, Burns & McDonnell was recategorizing its videos for content managers to make them more findable. The intranet team lead said:

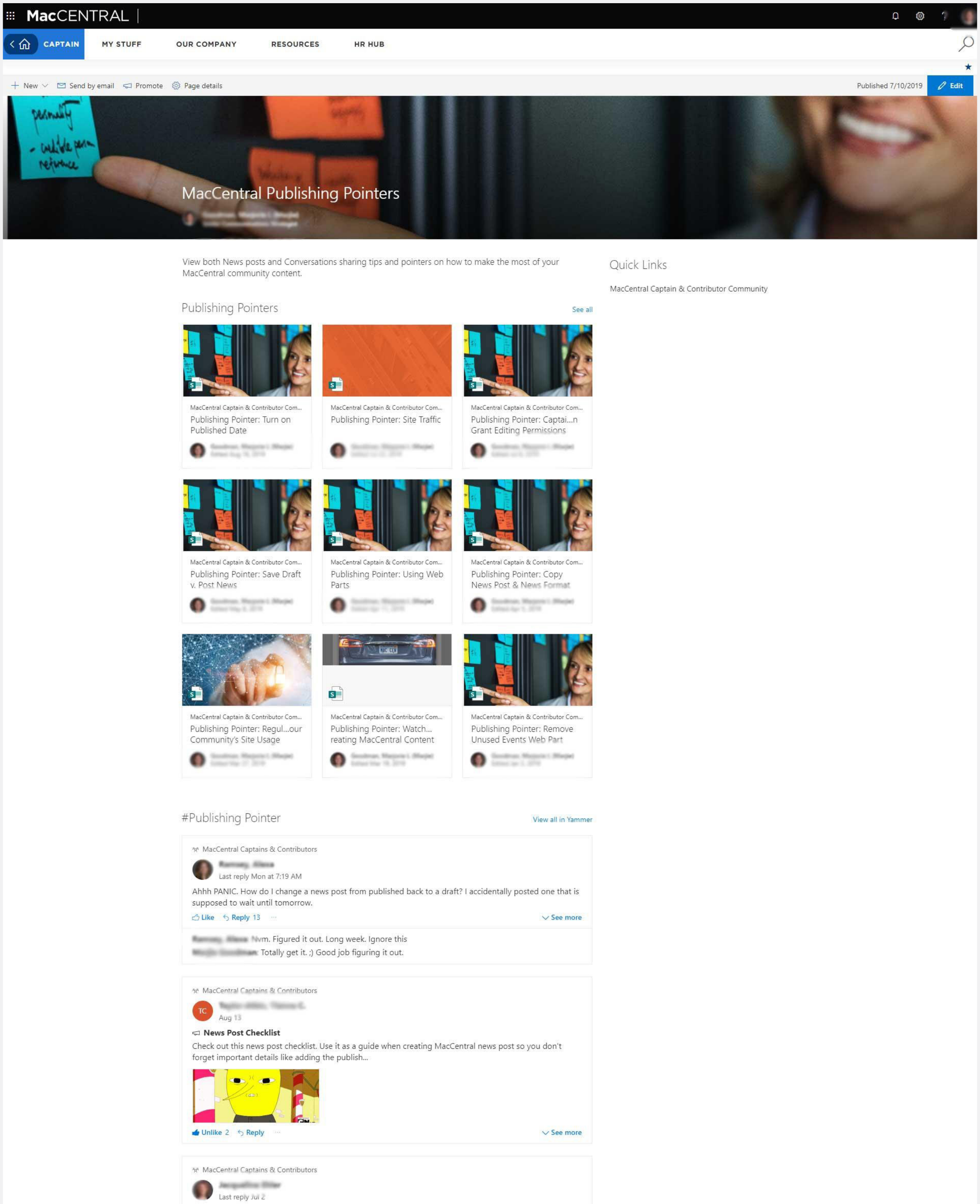
“I still get a lot of questions, but I usually can point them to something. I post updates often to communicate with them. We did a live update with them to talk on the fly and more quickly get feedback from them that went well. I point out things they should be doing in those weekly updates.”




*Burns & McDonnell’s intranet had a community dedicated to its intranet content managers.*



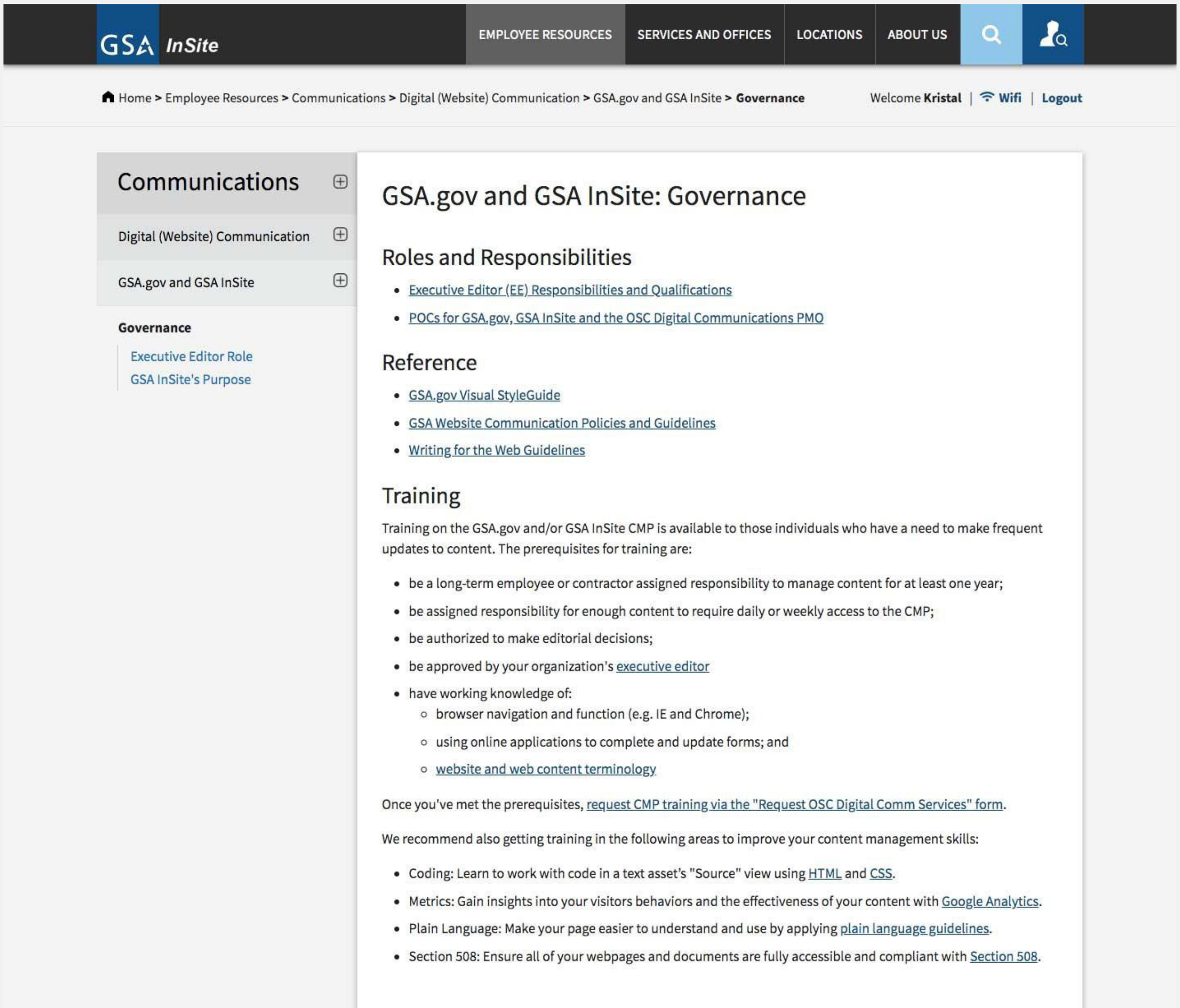

*Burns & McDonnell's content manager community also featured a conversation group so its Captains and Contributors could connect to discuss content questions, information, standards, and best practices.*




*A series of video-based publishing pointers on Burns & McDonnell's intranet ensured that content managers could make the most of their community content.*

At the GSA, even after employees completed rigorous content manager training and passed an exam, a lack of ongoing emphasis on reviewing the robust set of resources, standards, and training available right on its intranet meant that content managers would sometimes still call others to get help with things such as writing headlines and subheadings. Pair writing or peer reviews can be helpful, but not for simple tasks such as these when there are resources on the intranet available to help with that. Ensure there's support from leadership to encourage content managers to stay current on the latest standards. Acknowledge that useful content takes time; it is not something to rush through. When this happens, it negatively affects the end-user experience. A GSA content manager said:

> "I need your [other colleague's] brain; I don't know what's best for me to say for the headline on the landing page or where we place the links. Is it going to be at the top? I think one should say, *click here for new answers on the gym construction*. I need something that is going to draw them here. *Your fitness construction questions answered, click here for more information*? I do not have time to do a full banner, so it is just text. I just need to put something up quickly and something that it's not boring."




*The GSA included detailed resources for content managers on its intranet, which was favorable. Providing an ongoing emphasis on this section even after the first training would help ensure content managers are aware of it and rely on it to get answers to their questions, making this resource even more favorable.*

# Content Maintenance and Governance

## CREATING AND ENFORCING CONTENT STANDARDS

Employees at every organization have a primary job and managing intranet content is often only a small part of that job. Rarely are employees rewarded or considered fully responsible for intranet content. For the quality of intranet content to change for the better, these circumstances need to change. When we look at why outdated, duplicate, or excess content exists, we can identify some of the causes uncovered in the field studies we conducted. For example:

1. Loose governance or no process
2. No proper accountability for correct or updated content
3. Lack of experience and training
4. Subpar tools (CMS and hardware)

### 69. Set content standards and provide guidelines and processes for creators, managers, and publishers.

There are usually two main categories of standards for intranet content — general standards for writing for the web and content creation best practices that align with your organization's intranet and employee goals, branding, and culture. The standards you set should help you find you identify any problematic content that needs to be updated or fixed so that it aligns with the standards.

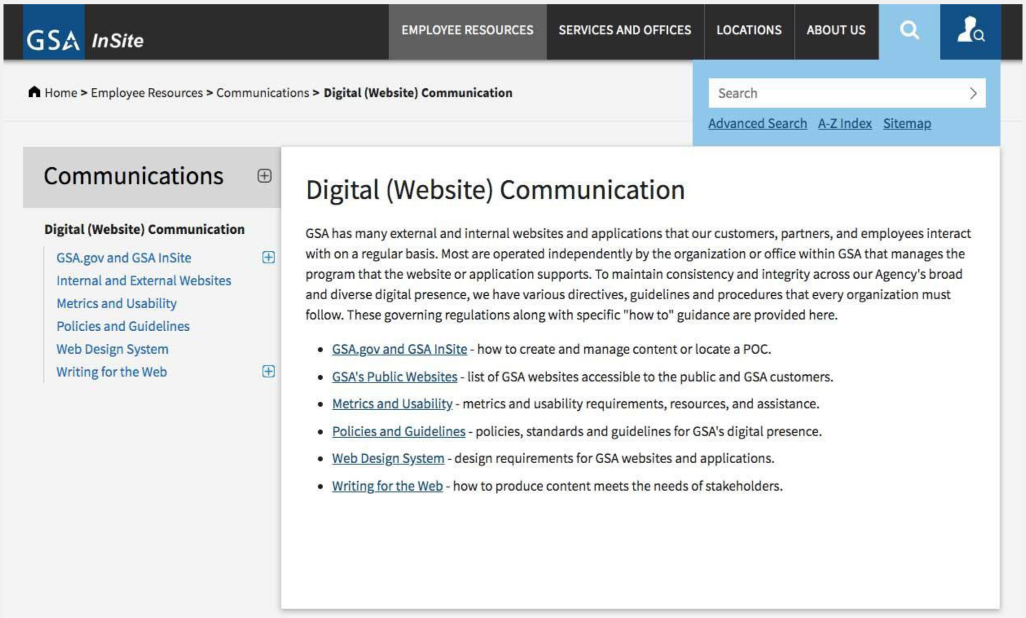
1. Industry best practices for web writing and other content formats:
   - Accessibility
   - Plain language
   - Clear headings, subheadings, and link text
   - Chunking and white space
   - Bolding of main ideas and concepts
   - Bullets and numbered lists
   - Proper contrast between background and text
   - No text embedded in an image
   - No video that automatically plays
2. An organization's own set of content standards, user needs, goals, and performance metrics, for example:
   - **User needs:** Specify the audience, its task, and its needs. Who are your content users, and what are they trying to do? When is one content format better than

another? (e.g., find answers, discover the latest information, learn about new topics, compare options, decide, get in contact)? To what degree does the content support them in that task?

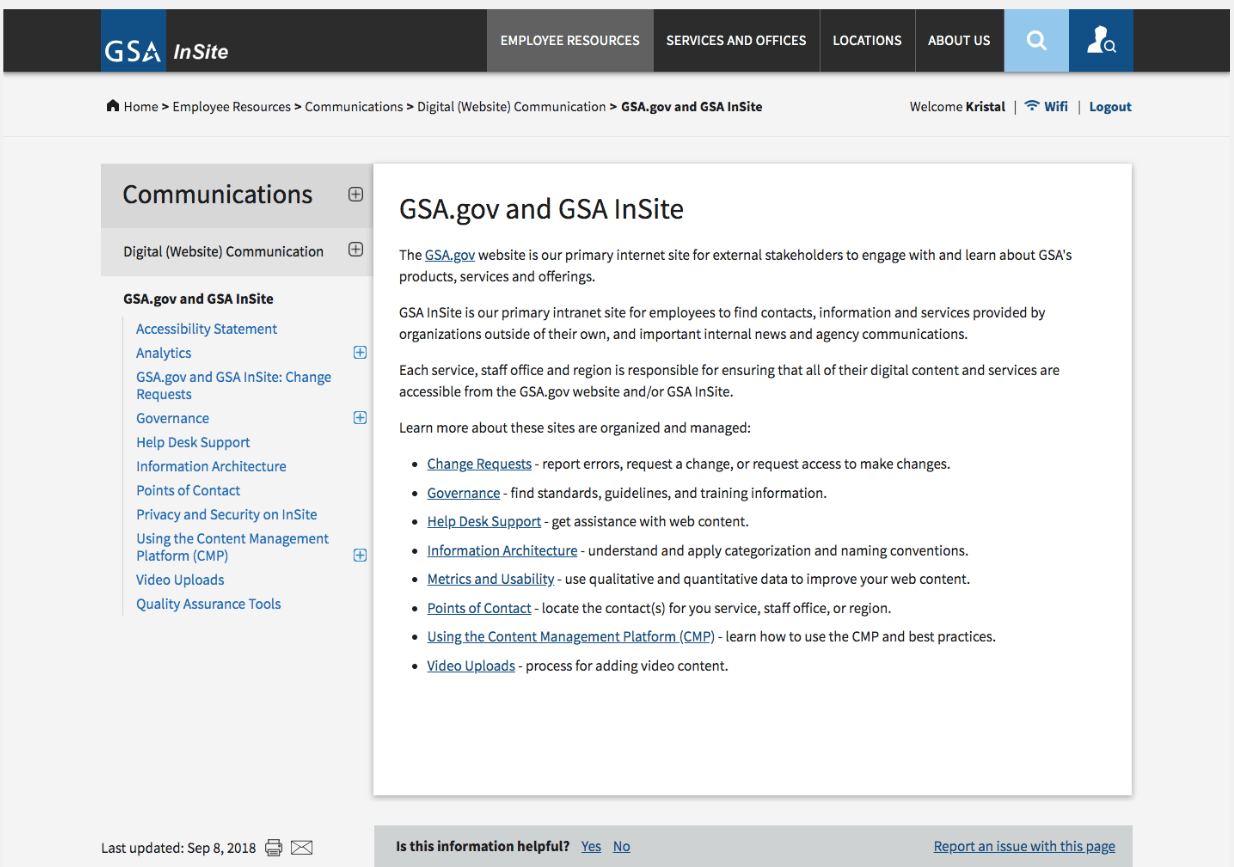
- **Content standards:** How long should the content live, and to what degree does the content reflect the organization's intended tonal values, include proper metadata, follow formatting and structuring guidelines, and uphold style guide and design principles?
- **Goals and performance metrics:** State what the content is supposed to be doing (e.g., create awareness, drive traffic, generate leads, sell something). Use performance metrics, such as clicks, views, bounce rates, likes, and shares, coupled with any qualitative insights from user research in your analysis. Does the content help reach the goal or detract from it?

Standards for when certain pieces of content need review are also helpful; include the frequency, what the review should specifically entail, and criteria to look at to determine the updates needed. Will time simply dictate the need for a review, update, move, or unpublish, or will more specific criteria such as traffic, clicks, or other engagement metrics drive updates?

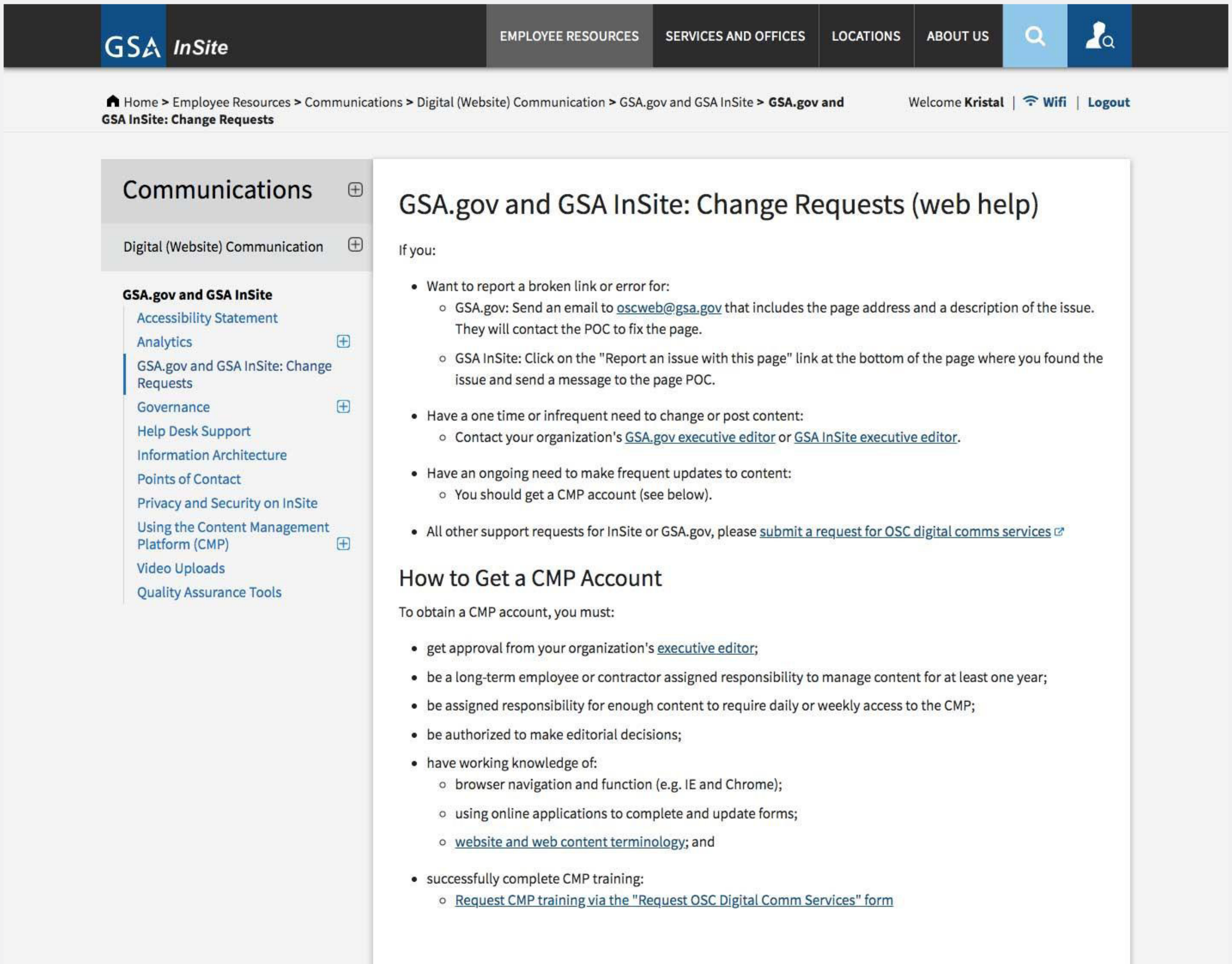
If you're working in a distributed content-management model and you're struggling to get a grasp on the content — until a hybrid or centralized content-management model is achieved or until a decentralized model is more closely governed — consider implementing an approval process to slow the creation of new pages that do not follow your content standards. Look for opportunities to condense content or break up longer content pages across multiple, clearly named pages. As the GSA faced this challenge, one of its intranet team members said, "We have a content style guide and an agency branding guide. There is also a governance guide covering how to create certain types of pages or events, shortcuts, topic pages, etc. It explains how the entire workflow works."



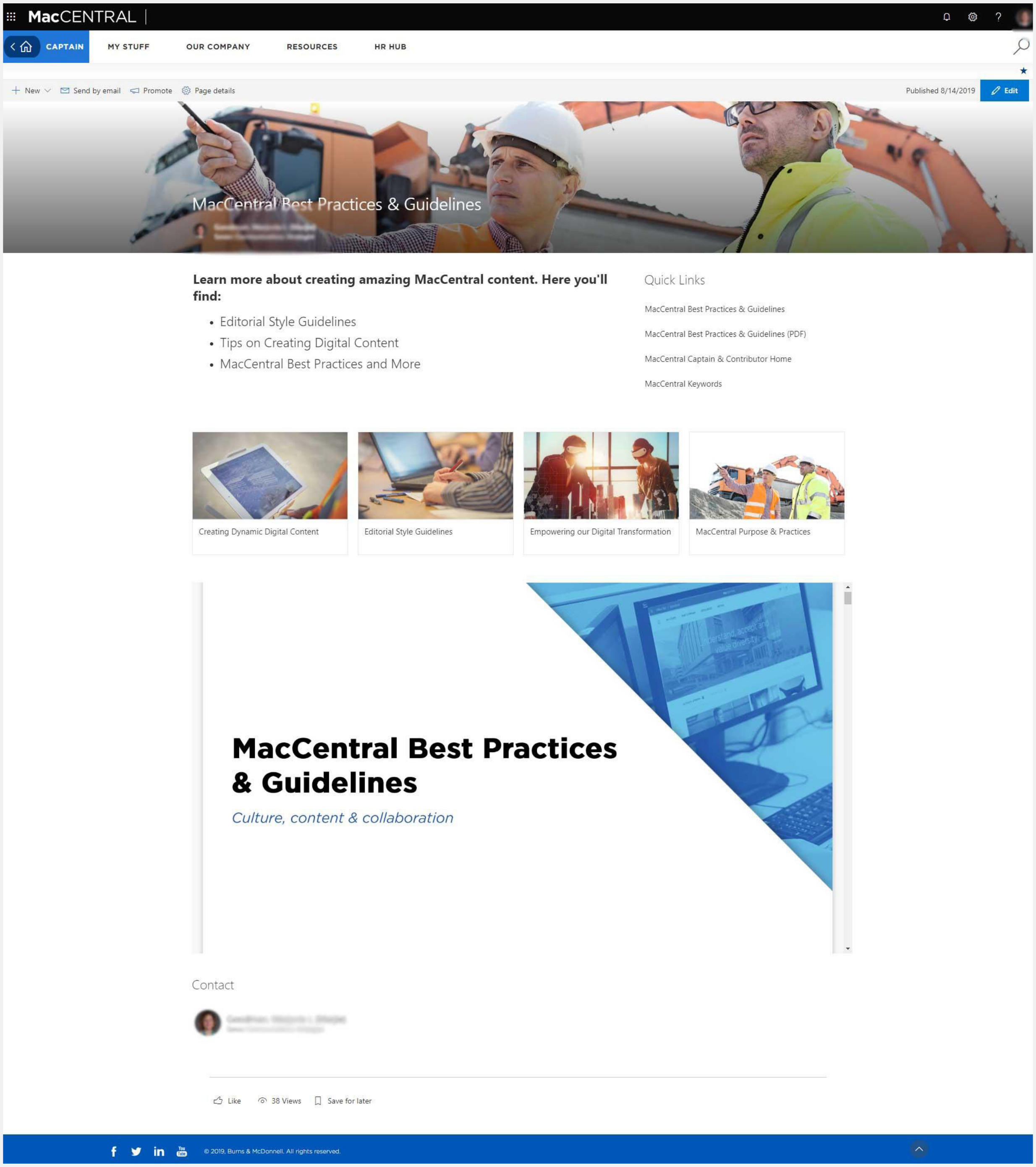

*The GSA included its standards on the intranet, which was favorable.*




*Standards appeared by section on the GSA's intranet, making them easy to find.*

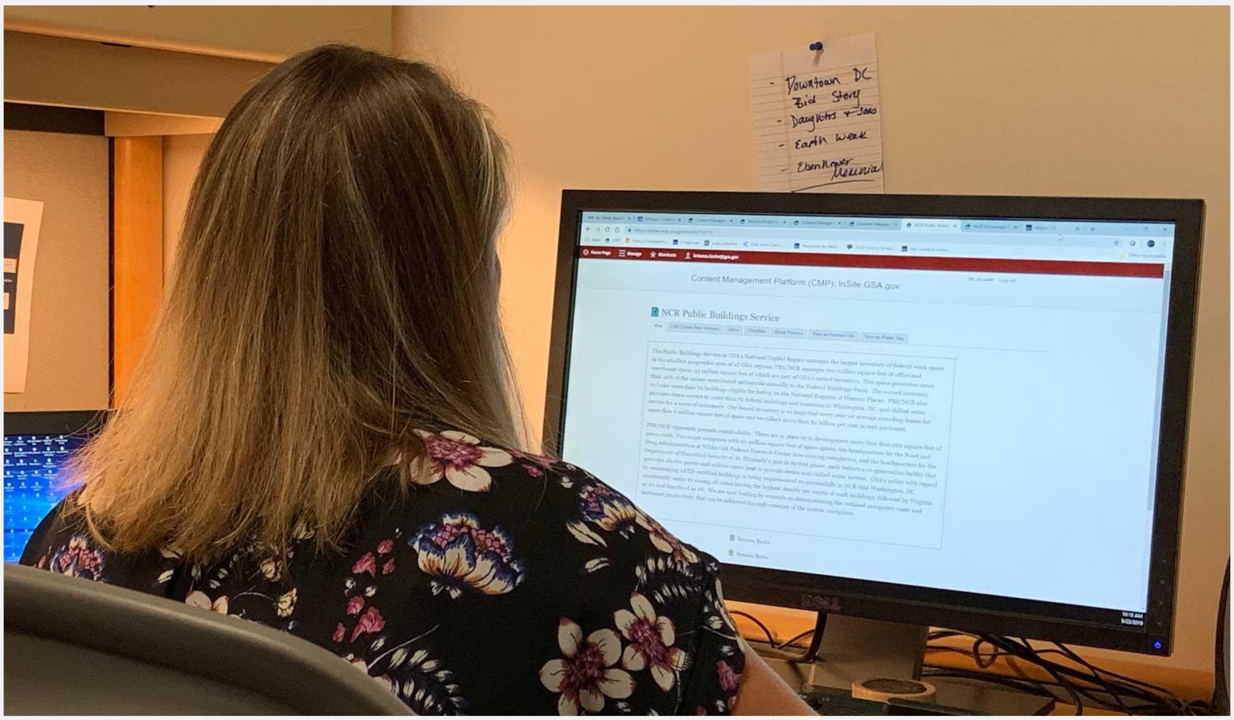



*Standards governing processes such as change requests and getting access to the CMS also appeared on the GSA's intranet.*

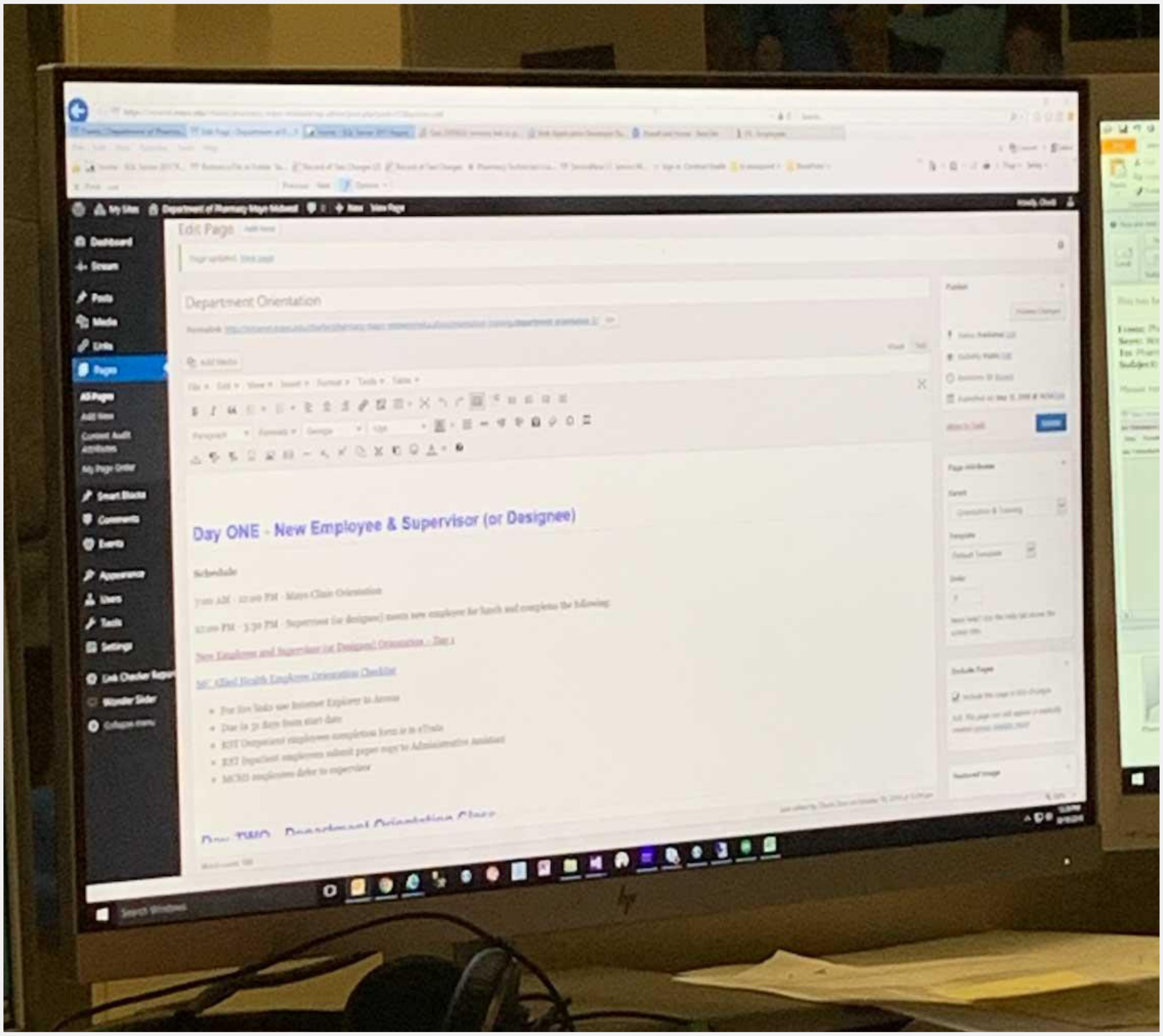



*Burns & McDonnell also incorporated best practices and guidelines on its intranet, covering topics such as dynamic content, editorial style guidelines, purpose, and practices.*

Without standards and accountabilities to ensure they are upheld, the intranet's content will be on a fast track to failure and disorganization. For example, in one such instance, while we watched a content manager working, she realized the pages she created needed different information than what she originally included. She said, "I hadn't decided how this was going to look before I started, which is probably not good . . . This is a hobby for me. We have a coordinator who usually does it, but she is out, and I like changing activities. So, since I can do it, I just do it." It's fine to take a team approach to managing content, but at least ensure anyone planning, creating, and publishing content is aware of and follows standards.




*Without standards, content authors may forget to add elements such as sub-headlines that help break up text walls into more digestible and scannable pieces of content.*




*Without standards, content managers too freely set their own standards for things such as headline styles and colors.*

The Mayo Clinic admitted to struggles with enforcing standards amid its distributed content-management model. Even though the organization had documented standards and created a publishing guide with lots of links to tech support, information on how the navigation should work, and how to start building a site, there still needed to be greater emphasis on referring to the standards over time and as content managers created and published more content.

Receiving it as part of a standard information kit when they setup a new site wasn't enough.

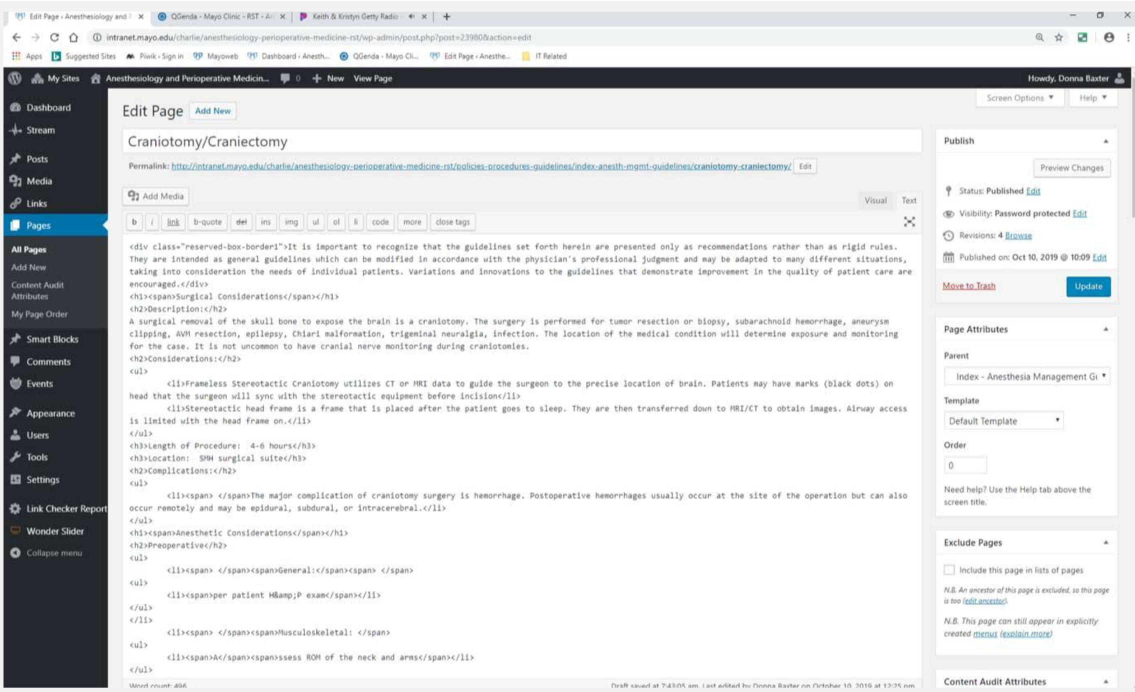
Mayo Clinic team members described how people across the organization were usually assigned (rather than volunteered) to oversee their department's intranet content and were rarely trained; this was often a responsibility on top of their full-time role. Within WordPress, some groups had entire teams in charge of the content, such as radiology, cardiology, and anesthesiology.

When the needs of content managers and teams went beyond the basic things, people could do in WordPress, the central team felt like they could not support those needs. One team member said:

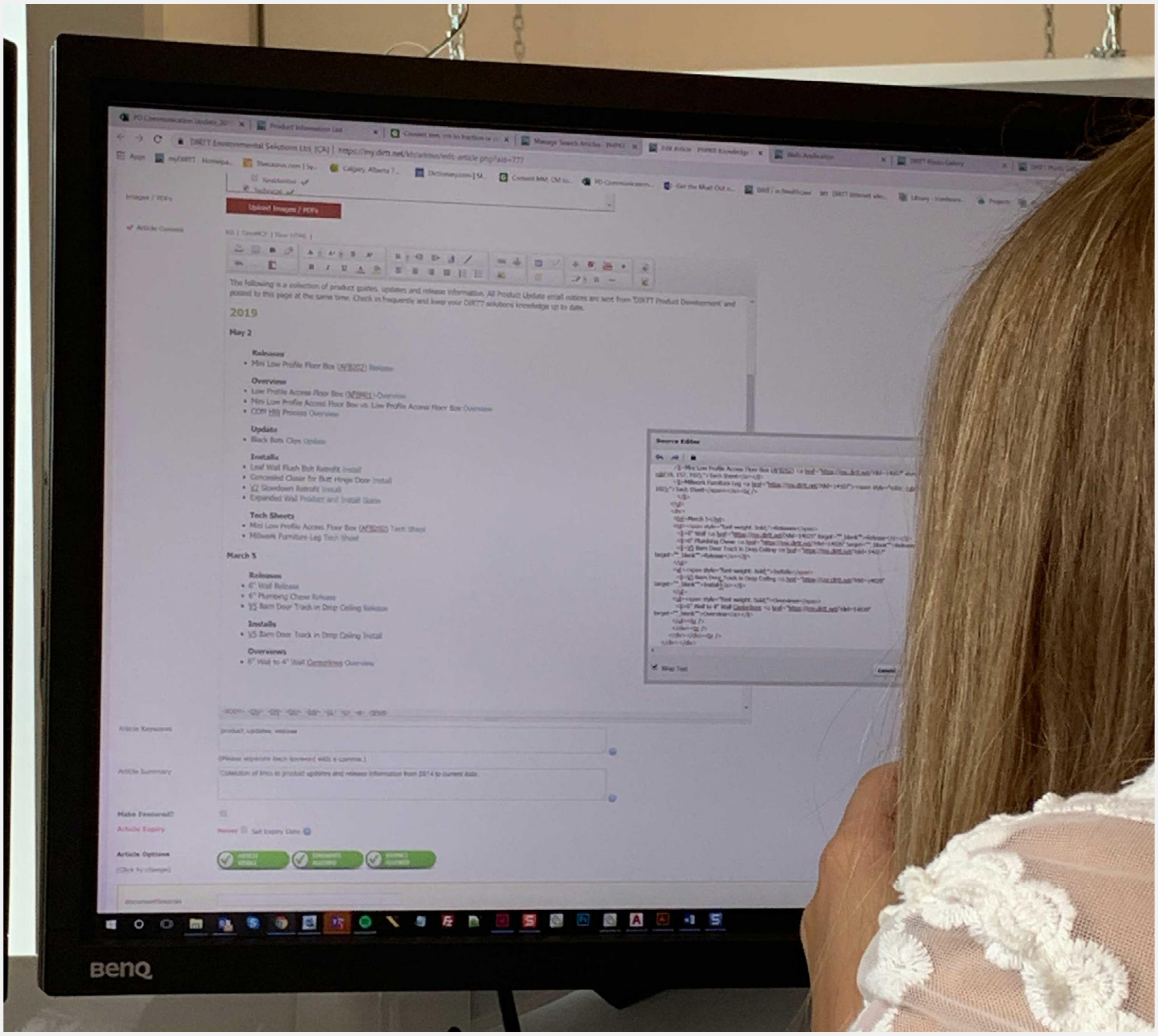
> "Teams adopt standards, work seamlessly, and then come to us for help. It's chaotic in self-publication; people can do what they want, which is good and bad. They must follow our templates if they use WordPress, but some people break the rules."

What the team member meant by "break the rules" was that sometimes groups ignored the standards completely and inserted their own code into WordPress to override set styles because some of the content managers had played around with websites before in their free time.

Avoid having people in different job roles (other than developers and IT professionals) manipulate the intranet's code. They may know a little HTML and CSS, but they may not understand how to mark-up content in a way that makes it accessible and readily available for search in this manner.




*Throughout our studies, we often saw content managers manipulating raw HTML, CSS, and JavaScript to do something they assumed the CMS could not otherwise support.*



*Manual manipulation of raw HTML, CSS, and JavaScript usually conflicted with established CMS standards, which introduced inconsistencies, and sometimes usability issues on the intranet.*

The team at the Mayo Clinic also described how its distributed content-management model and loose adherence to content standards meant that sometimes teams would build content but then not keep it up. The content would usually become outdated until the intranet team got someone else to take care of it. Team members described how in one instance, a content manager who inherited a mess of content from an earlier team called the intranet team in tears, saying, “People never told me I had to publish website content as a part of this job.”

Publishing content on an intranet should not make someone cry.

The team member also said:

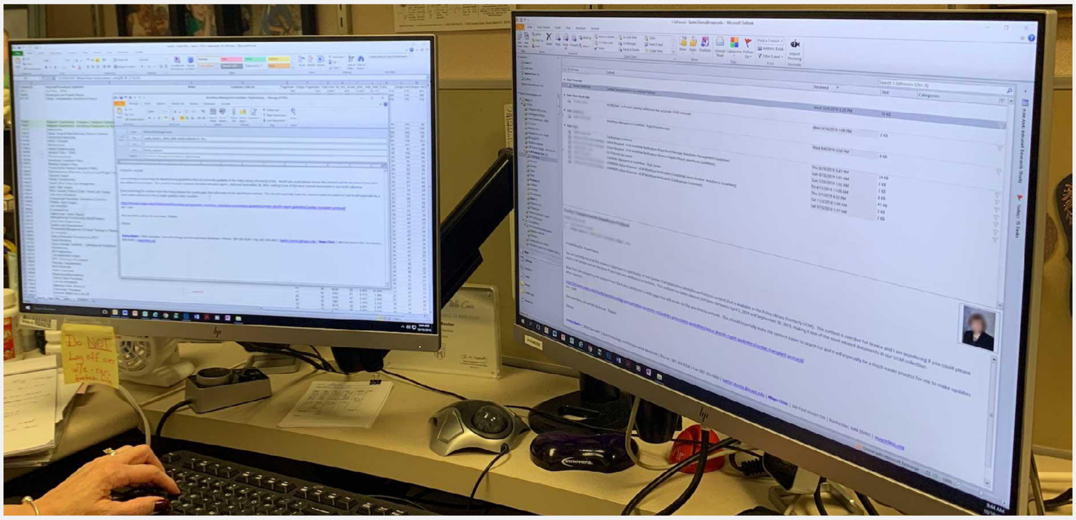
> "We can't always sit with them to show them how to learn it. We have Yammer resources, but people do not want to learn this way. The younger employees prefer self-publishing. A lot of them had to use WordPress for college papers; some are intimidated, others are not. Most content owners are administrative assistants who have been here a long time."

Documenting and enforcing standards and processes on an ongoing basis is important, especially because when people in charge of intranet content leave the organization or retire, the knowledge will go with them if it is not readily available for others to learn from. In our studies, we saw an administrative assistant who oversaw content at the Mayo Clinic for many years. She had developed her own processes and standards for content within her group, some favorable and others not. For example, after updating a piece of content, she would send a copy of an email to herself because she felt like otherwise, it was too much to keep track of updates.

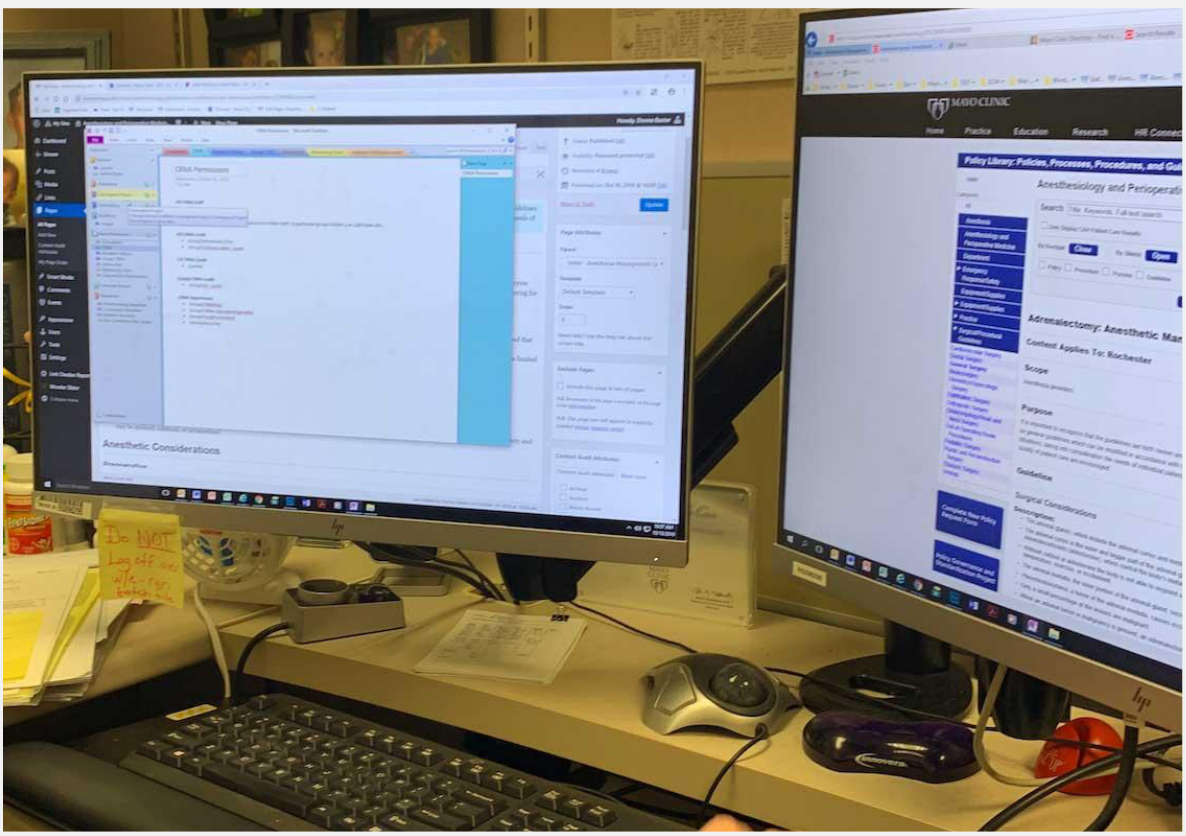
She also had a lot of other workarounds for things WordPress could have done for her. She had notes for which headline styles to use written on Post-it notes and said she sometimes prints out pages and marks them up manually with headline tags. She also keeps track of what to check before publishing, such as link text, headlines, and citations, in a personal OneNote document. She said:

> "As you can see, I make executive decisions because they don't even look at the content. I try to do this, but since I'm going to retire in a year and a half, so I need to start writing things down because, after 45 years, a lot is in my head."

A better approach would be for all content managers at the Mayo Clinic to follow the same standards and processes, and accountabilities for upholding content, even in a distributed content-management model.

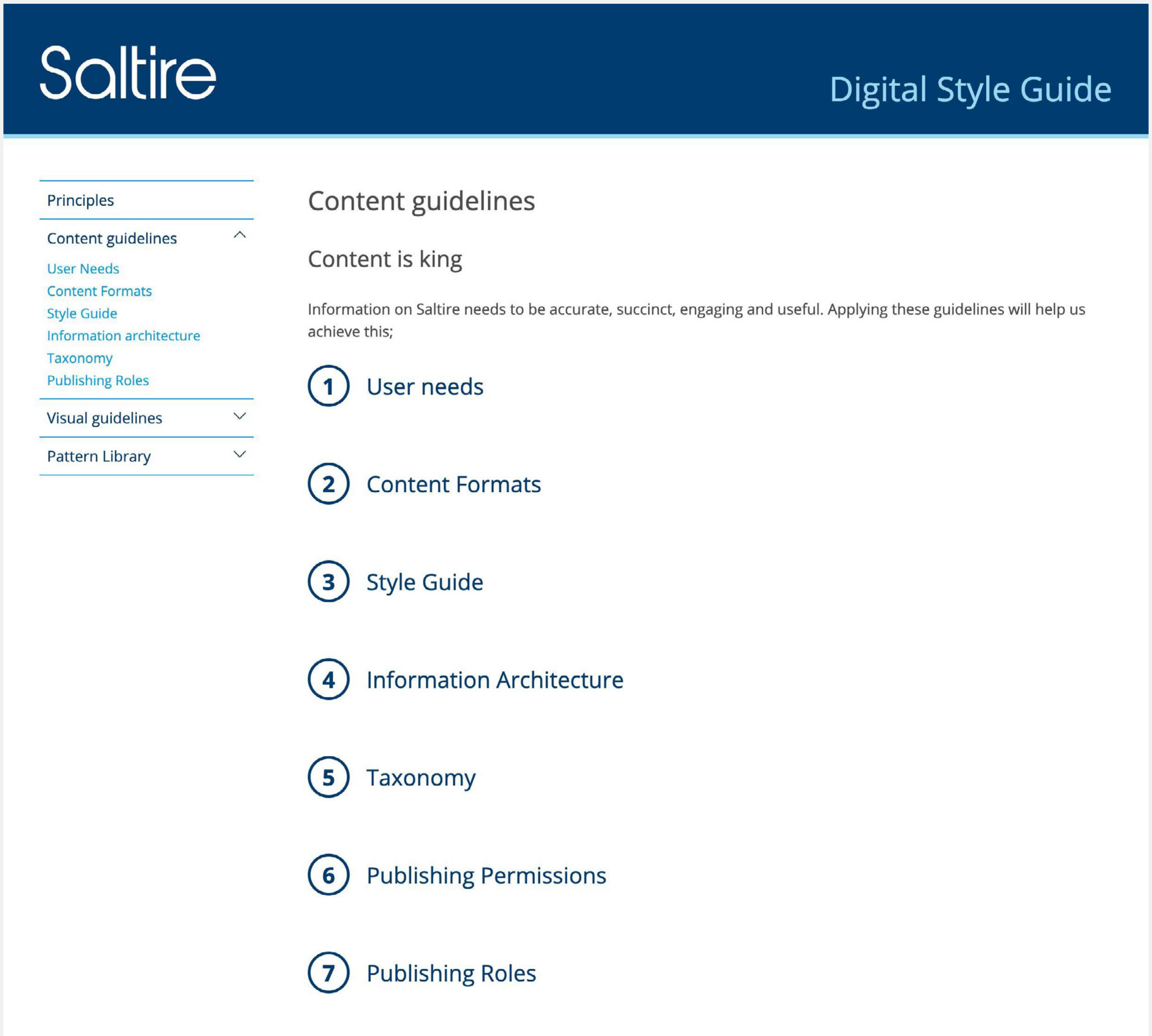


*A content manager emailed herself to remember which intranet content she already updated.*




*The same content manager said she had created her own standards and a punch list of items to complete before publishing content. She kept this in a OneNote document. A better approach would be to surface and share these standards with other content managers across the organization by posting them directly on the intranet.*

The Scottish Government housed its intranet design principles, content standards, and pattern library on SaltireGuidelines.com, a WordPress site that the team could update over time as the intranet progressed.




*The Scottish Government housed its intranet content standards on SaltireGuidelines.com. These included incredibly detailed standards for user needs, content formats, the style guide, information architecture, taxonomy, publishing permissions, and roles, which was excellent.*

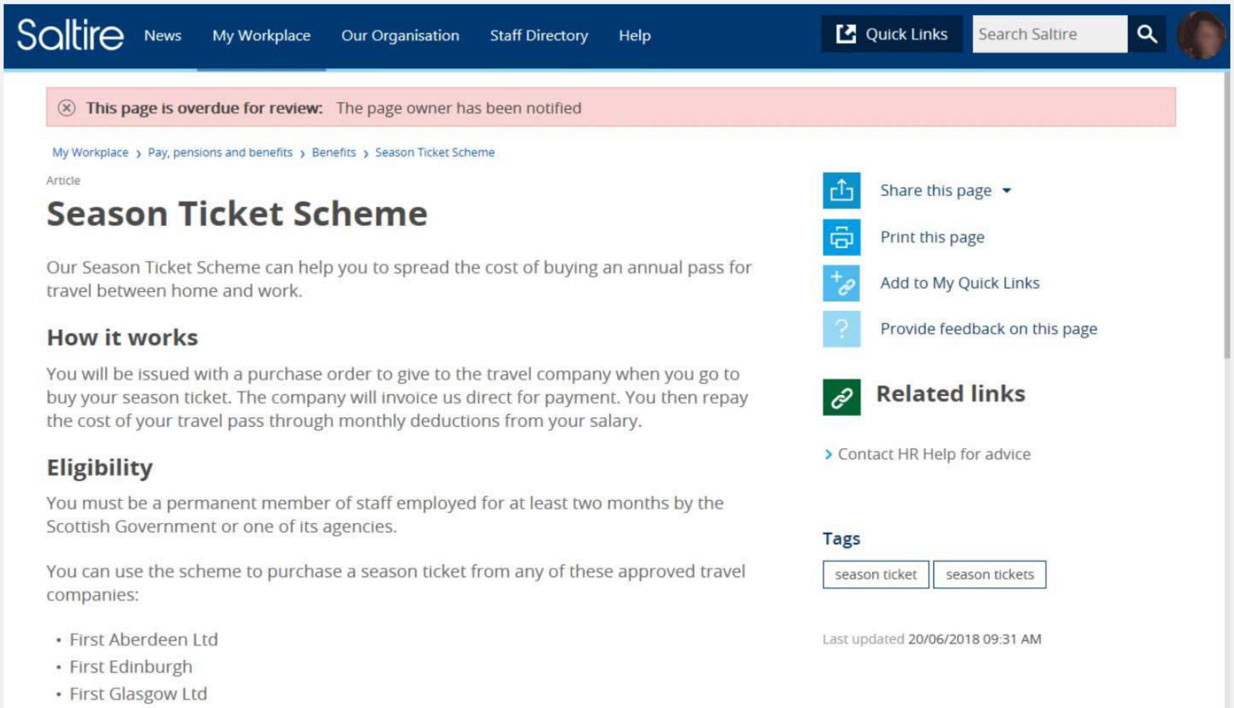
Having a solid, practical set of standards means the individuals who handle and manage content do not have to spend excess time and energy thinking about what to call something, what format to use, or where to put it. This is critical in cases where content managers are also doing double duty with their full-time role, as specialties such as IA are not their primary expertise. The benefits of strong standards outweigh the effort required to create and support them over time, especially for the intranet team, for which there is a massive benefit. When content managers need answers, are redesigning an area, or creating new pages for a new department or team, the standards should guide them through this process to self-serve and learn by doing independently, with minimal help from the intranet team.

## AUDITING, UPDATING, AND CONTINUOUS IMPROVEMENT

### 70. Set end dates so that publishers or owners review and update content regularly.

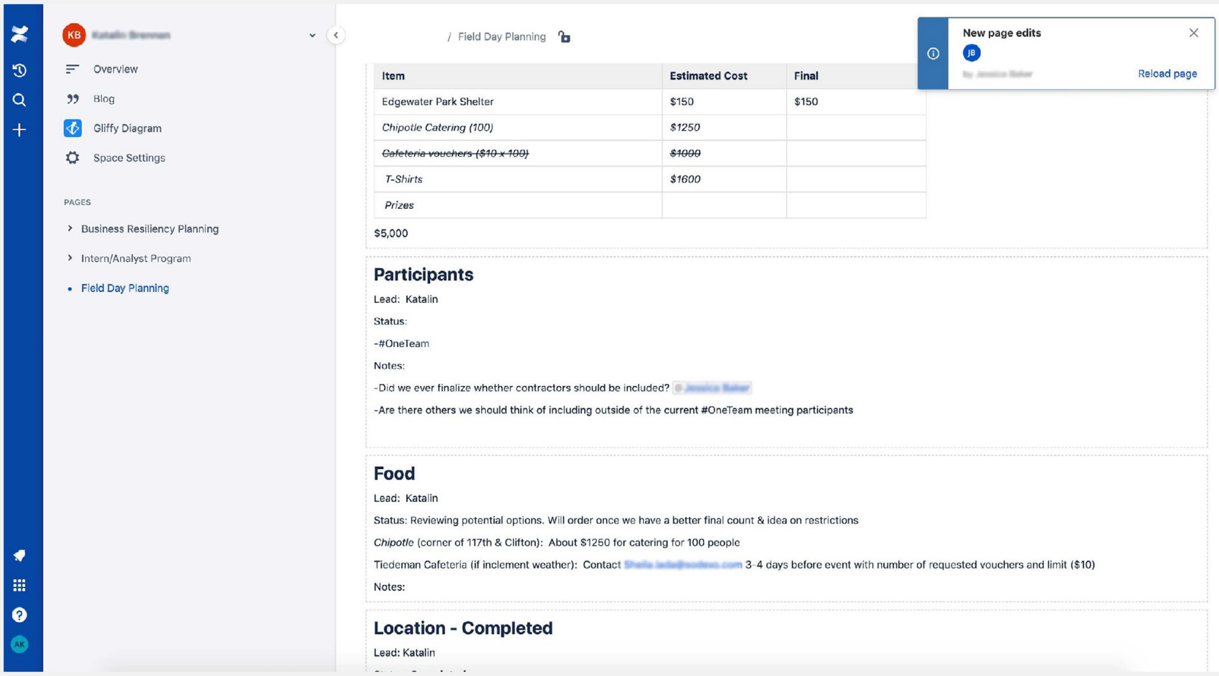
New and fresh content is essential for intranets, but removing old, redundant, or outdated information is equally important. Many content management systems allow for the creation of end or review dates, which can help automate this “spring cleaning” of content. Depending on the type of content, a semi-annual or annual review is typically adequate. For instance, policies or more static information do not typically need updating more than once or twice a year. However, news items or messages may need more often updated or removed. Set end dates on content so that old content is automatically retired.

For example, when a page of content was overdue for review at the Scottish Government, a red alert would appear at the top. This approach was favorable as it alerted users that the content may be outdated and notified the content owner it was time to review and update.




*When content on the Scottish Government's intranet was expired and ready for review, a red alert appeared at the top of the page.*

On KeyBank's collaboration platform, when new edits to pages or content happened, a small toast alert appeared in the upper right corner of the page. This was helpful as many users were often looking at and editing the same pages. It also displayed *who* made the edit in case there were further questions or clarifications about what changed.




*On KeyBank's collaboration platform, a small alert in the upper right corner signaled to users when someone changed page content.*

When content end dates approach, send an email (preferably an automated email) to the content owner reminding them to review the content. It is their responsibility to ensure the content is still correct and necessary. Remove unnecessary content and update outdated content to align with the intranet's standards. Some content may be able to stay as-is on the site, and after review, update the end date to reflect the next review cycle.

If reviewers are slow to respond to content requests, set a deadline, but supply ample warning, then remove content on that date. Do not permanently remove content, as content owners or authors may realize they let the deadline pass and need the content to remain on the intranet. Make sure it's easy to re-post information if needed. When we discussed the content review and removal processes with the Co-operator's intranet team, one team member said:

> "We have so much content in SharePoint, unfortunately, and a lot of it is out of date. It is just the four of us [auditing], and if we all agree something is not up to date, we collectively decide to remove the piece, or I will make a note and go in later and archive it. If we are working from home, we email . . . but it is great if we are here and can just huddle."

Bracknell Forest Council had automated emails to remind employees to review and update intranet content. From the emails, content managers could click on the link and go to the page that required review. If the content looked correct, the content manager would update the date and continue to the next email. This content review process consisted of reading or scanning through each page, looking at attachments, and making necessary changes. Most content up for review was in the intranet's *How do I?* area. Individuals deleted the emails when the content update was complete.

Content managers would sometimes augment the process by setting calendar invites for themselves to reserve time to review and update content. We saw a content manager create an Outlook task to remind themselves to review intranet content. They said:

> "I need to review content on the intranet. I can go through some of them quickly and leave others for another year. Then there are others where I need to spend more time on it, and I don't want to do that right now; I might need to get more information, so I want to set some time aside to focus on those. When you are working from home, you can get a lot more thinking done."

Additionally, ensure any automated emails go to the right people, those who initially created the page, and the author if they are different people. For example, a content manager was confused about why she received emails to review content when she was not the page owner. She asked her colleague across the table if she had also received these emails, and her colleague said she had. They discussed the confusion and wondered if it was because they created the page initially, even though there was a different page owner.

## 71. Incrementally review and update content over time.

It is not practical to have a massive amount of content to review and update at the same time every year. A content manager at Bracknell Forest Council described how they could have done a better job of reviewing smaller-scoped batches of content at specific points throughout the year, for example, quarterly. She said:

> "A lot of the review content emails came through, and I noticed that some of those pages had already been unpublished, and I did not know why [two pages where that happened]. I have been delegating more content reviews out to people, and now that I know that we have been getting duplicate emails, it is frustrating that we are duplicating that work. Sometimes when I have a whole block of stuff to think about rather than one at a time, I feel pressured to get it all done at once. We get these same reminders every year, and we fall into this same routine every year."

Dell had a renewed focus on updating its intranet content in small increments over time and began to emphasize who handles the content more. Since it's such a big company, the intranet has a massive amount of content. Members of the Dell team described how they had policies they needed to adhere to, but no one handled it all. Historically, community managers should have been doing audits and updates, but if they did not audit and update content, then it didn't happen.

Dell began using Centers of Excellence to track what content was out there and which individuals were responsible for ensuring content was recent and correct. HR, IT, and Legal were three important departments that followed this structure of auditing and updating. An intranet team member said:

> "We are working with legal to alert community managers that content is getting updated. We often cannot just remove content; we must keep records of what was there. A lot of the time, it's 'Oops, here's some content that's incorrect, time to update it.'"

**Use data to guide the updating process.**

Process and Strategic Considerations

Use analytics to see how many page views a page or document has had over a quarter or years. It's acceptable to review content in priority order of what received the most attention. It's also a good practice to usability test content that received high traffic to ensure any updates made to the content align with real employee needs. The intranet team at the Scottish Government looked at overall ratios for content updates to see how well they were tracking against their goals. One of the team members said, "We like to look at statistics to see how much content is staying up to date. Knowing 76% of content was reviewed is helpful to know."

Also, use data to inform decisions about retiring and unpublishing content. If something has not surpassed a certain threshold of clicks or page views, removing it from the intranet might be acceptable. Always obtain any necessary approvals from content owners, teams, or department content managers before doing so.

## 72. Display dates for when the content was last updated right on the page.

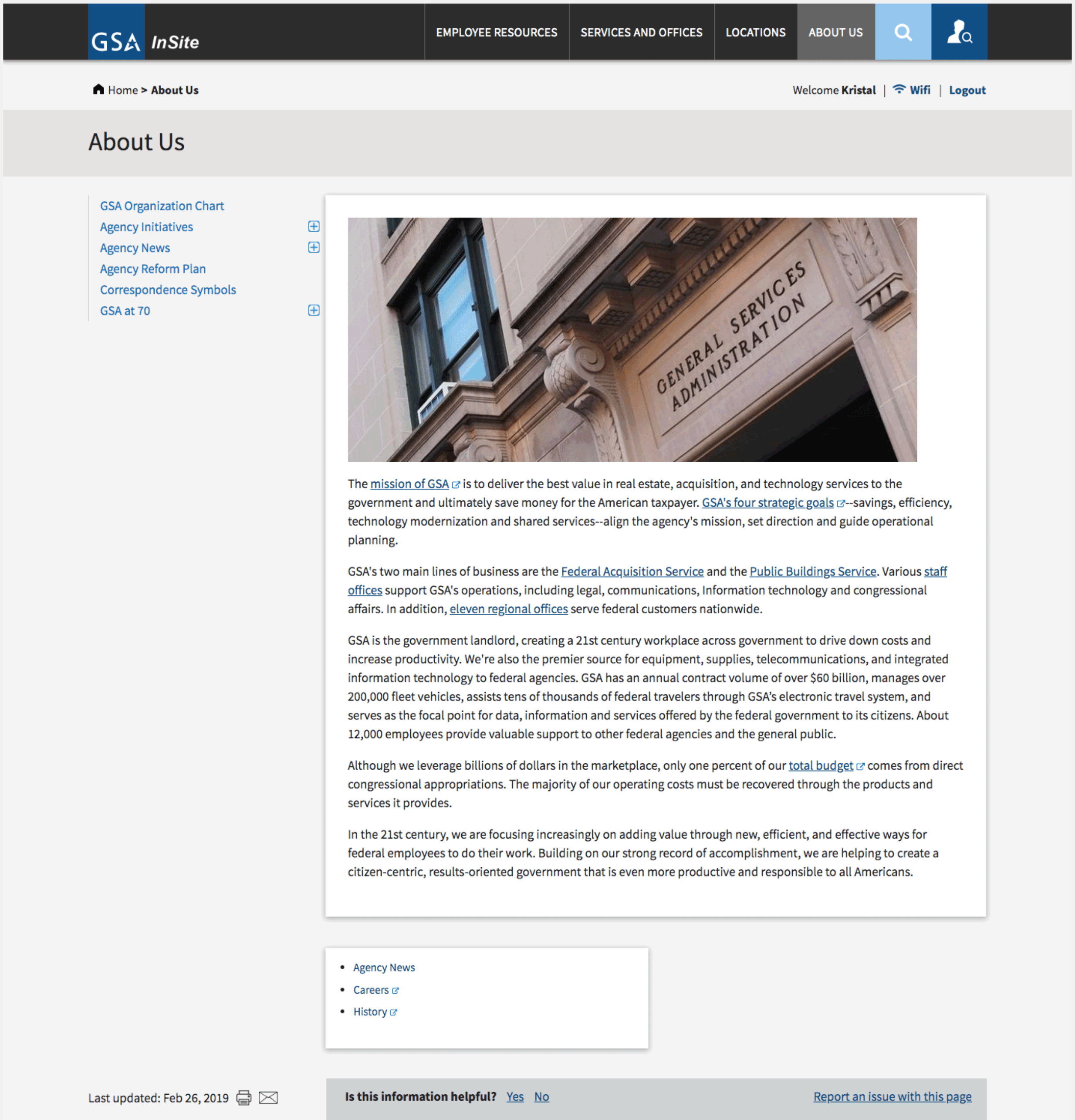
At some of the organizations we studied, when editors logged in, they received a notification about any pages that had been created a year or more prior and needed to be reviewed and updated. The notifications persisted until the content manager updated the page. Everyone received a list of pages they had to check and the deadline. After updates were completed, the date on the content reflected when the most recent update occurred. For example, the Mayo Clinic had a WordPress plugin for content audits on its intranet. Content managers could input a date range and get a report of any content ready for review and update.

It listed outdated pages, and content managers sometimes had to email whoever owned the content and ask them to review it. One administrative assistant who managed intranet content described this process:

> "At least we can see it [outdated content], but managing it is another story. I cannot stand outdated content; it is so hard to keep up to date, and people are so busy. It's not high on their priority list — only when they want the content out there. When it comes to reviewing it, people do not want to do it."

This was a big problem at the Mayo Clinic and other organizations we studied. However, a remedy to the situation was to display the date the content was last updated right on the page. Showing the date helped for two reasons; first, employees could see the dates on the pages and question the recency of the content. Then, if something was massively outdated, they could also reach out to someone listed on the page to request it be updated. Having content owners' names associated with outdated dates also motivated them to get their content updated quickly.

The GSA followed a regular cadence of updating content on its intranet. As soon as a content manager updated a piece, the date on the page reflected the update.




*The GSA posted the* Last updated *date on its intranet pages, which was favorable.*

# CONTENT EVOLUTION, ARCHIVING, AND UNPUBLISHING

## 73. Develop standards for when it is time to remove various content types.

Each content type needs a specific timeframe for how long it will live on the intranet. Some content, such as a classified ad, may only exist for a few months or less and then be retired. For other content types, the criteria used to judge whether it's time to retire, modify, expand upon, or move it to its own section will differ based on the content's purpose and relative relevance to employees. Some content types may live on the intranet forever, but not without ongoing review and maintenance so that it continues to adhere to intranet standards.

Other pieces, such as news, might need to move to an archive after a year. Other content and information may start as a series of notifications, announcements, and homepage features but eventually needs to move and expand to its own intranet section or live contextually within a department, team, or other existing areas. Documenting the lifecycle of various content will help keep your intranet tidy and relevant.

At the time of our research, the First Solar team was not doing anything to retire content but said they eventually wanted to create retention schedules, such as setting a timeframe for when content types would automatically become archived. They proposed a process triggered by low traffic, page views, and clicks. When these metrics became low, the content owner would get emails requesting then update it, and if the content remained without an update, it would go into the archive. An intranet team member said, "There's such hesitation to lose content that might be important, so we haven't been able to come to an agreement yet. Many pieces of content have different legal requirements."

In some of the organizations we studied, when content managers posted content, they were the ones who determined when and whether to archive it (or not), but for content such as events, those were removed from the intranet immediately after the date had passed. One City of Calgary team member said:

> "We put our content on the chopping block; if it hasn't been updated in a year — chop it. Sometimes it must stay if there are compliance reasons or something else. If an item gets zero page views in X amount of time, it needs to go unless required by law."

### Consider how adding or removing content will impact the intranet's design before doing so.

Process and Strategic Considerations

Adding and removing items, even in a confined page area, can affect the page layout and the users. For example, announcements are common on intranets. If they appear in an uncategorized list on the right in the *News* section landing page and there are no announcements, the page will have a big blank spot, making the page look lopsided and affecting how the user's eye moves around the page. Conversely, if there are too many announcements, the page will be too long, scrolling forever. Users will potentially miss important items in that long, uncategorized list. Depending on where the last announcements hit the page fold, users might not even realize there are more items below.

Consider existing menu links and navigational structures when planning for and adding updated content or removing old content.

Do not over-scrutinize inventorying, auditing, and removing intranet content. If you are unsure whether something meets user needs, follows content standards, or drives metrics, note it in a collaborative and accessible way to alert the rest of your intranet team members and content managers. Those pieces are good examples to bring up to your team or the content creators to get their perspective. They may also have more context to help you determine whether to leave the content as it is, update it, or remove it. Such instances may also help your team realize the importance of documenting user needs, content standards, goals, and success metrics before content creation begins or continues.

Use all of the guidelines in this report to help your team shift their focus and mindset from quantity of intranet content to quality. Keep track of what content you have, where it lives, who owns it, and how well it performs. This information will reveal whether you should let your content live as it is, improve it over time, or remove it altogether.

# Methodology

# Intranet Guidelines Study Overview

In these studies, we used three methods — usability tests, contextual inquiries, and expert reviews — to gain a variety of insights into the usability and effectiveness of intranets as a whole.

## USABILITY STUDIES IN A LAB SETTING

We watched employees use their company's intranet in a lab setting at every company, typically a small conference room or an office. Employees used either a company computer or their own company-issued computer. Some participants also used their mobile phones. Researchers observed four to six employees at each study location in organizations that ranged from small companies to large enterprises across the United States, Canada, and Europe in the 2019 study.

We gave users tasks to perform and quietly observed them as they worked. Users were asked to think out loud as they completed their tasks. They were also told to carry out each task as far as they would if they were on their own. Following the completion of each task, the researcher presented users with a brief satisfaction survey and asked follow-up questions.

There were two types of tasks given to users: directed and exploratory.

- **Directed tasks** require the user to find a specific piece of information (e.g., Who is the CFO?) or perform a particular task, such as submitting a support ticket to the IT department. When a directed task is given, there is a clear endpoint: the user either finishes the task or gives up.
- **Exploratory tasks** allow for a more natural exploration of content. There is no right or wrong answer when an exploratory task is given. Administering these tasks reveals how discoverable and engaging the content is on the intranet. For example, users were asked to find a community group they might be interested in joining or to see if there were any news articles they'd like to read.

In each session, users performed the directed tasks first and then completed as many of the exploratory tasks as possible in the time remaining.

For directed tasks, we recorded how long each employee took to complete the task and whether the task had been completed successfully. Employees were unaware they were being timed, and we did not tell them they were being assessed on whether their answers were correct. None of these quantitative measures were used to assess the performance of participants included in our study. Instead, they helped us to evaluate the usability of many different intranet designs.

## Tasks

In each research study, we gave users similar types of tasks so that we could compare the performance of the same tasks across intranets, including those tested in previous studies. Although we tried to keep tasks consistent across organizations, the tasks administered varied slightly from one organization to another depending on what was offered on each intranet and what was realistic for employees to do. The table below shows the shell tasks (with an example) that were administered in many of the intranet studies.

| TASK PREMISE | EXAMPLE | TYPE |
|---|---|---|
| Find a cafeteria menu | Use the intranet to find out what burger is being served in the cafeteria today. Tell the researcher your answer. | Directed |
| Find a colleague's office location | You've been told you need to speak to ‹name› from ‹a department›. Use the intranet to find where they are located. Tell the researcher your answer. | Directed |
| Sign up for training | Use the intranet to sign up for product owner training in October. Stop before signing up for the training but point to where you would click. | Directed |
| Find a specific piece of information | Your company offers tuition assistance. Use the intranet to find out how much money you can receive each year. Tell the researcher your answer. | Directed |
| Submit an IT request | Your office phone keeps dropping calls. Use the intranet to get it fixed. Go as far as you can without actually sending the request but point on the screen to where you would click. | Directed |
| Find the latest piece of news | Find the latest news article on the intranet. Tell the researcher your answer. | Directed |
| Find information about leadership | Use the intranet to find out when the Chief Operating Officer joined the company. Tell the researcher your answer. | Directed |
| Find a benefit | The company offers on-site childcare for employees. Use the intranet to find out how much it costs per month for a four-year-old child. | Directed |
| Request leave or vacation | Use the intranet to request a half-day off this coming Friday. Stop before submitting the request but point to where you would click. | Directed |
| Look for a job | A colleague mentioned there is a ‹certain job role› available. What level of education is needed to apply? Tell the researcher your answer. | Directed |
| Explore engagement with content types | Find a blog on the intranet that you'd be interested in reading. Say what you are thinking as you work on this activity. | Exploratory |
| Explore engagement with content types | Go to the intranet and see if there are any videos that interest you. Watch as many as you would like. Say what you are thinking as you work on this activity. | Exploratory |

| | | |
|---|---|---|
| Explore engagement with content types | Read something interesting in Yammer. Say what you are thinking as you work on this activity. | Exploratory |
| Explore engagement with content types | Use the intranet to find a community you'd like to be a part of. Say what you are thinking as you work on this activity. | Exploratory |
| Explore engagement with content types | Use the intranet to find a piece of news you're interested in reading. Say what you are thinking as you work on this activity. | Exploratory |

## CONTEXTUAL INQUIRY IN THE USER'S ENVIRONMENT

We carried out contextual inquiries with employees at several organizations in 2005, 2011, and 2019. During these sessions, we observed employees wherever they worked, usually at a desk but occasionally in less traditional spaces, such as the floor of a retail store, at the ticket gate of an airport, or even at a quarry!

In a contextual inquiry session, instead of giving users tasks (as in a usability test), we simply watch what users do in their everyday jobs. Doing so reveals more about how employees actually work (outside the artificial setting of a usability test). We were also able to observe more atypical aspects of use, for example, the experience of content editors using a content management system (CMS) to update content on the intranet.

To ensure contextual inquiry sessions were useful, employees were told to save work that involved using the intranet for the time they would spend being observed by a researcher. The sessions began with a short, semi-structured interview, followed by a period of uninterrupted observation. Follow-up questions were asked of participants after the observation period ended. Sessions lasted 90–120 minutes. We observed users interacting with other people, their computer, and the intranet. Watching users do their routine work gave us valuable insights into how well the intranet facilitated users' productivity, motivation, and information finding, as well as their everyday work.

## EXPERT REVIEWS

Based on watching hundreds of people use intranets over the years, combined with design and research experience and knowledge of design principles, researchers were able to make judgments about which designs might cause issues or help users as they reviewed the intranets on site. While watching actual users is far more important and telling, experts can provide insights about a design's potential effectiveness. Some of these thoughts are expressed in our reports.

## PARTICIPANTS

The intranet teams at each organization recruited employees for the usability tests and contextual inquiry sessions. We provided guidance for the recruitment, including stressing the need to recruit a representative sample (such as a mix of genders, ages, tenures, and roles).

All research participants knew their company had an intranet, and many of them said they used it every day or at least every week. Although one might assume daily users would be expert users, we found this was not the case. Our participants typically worked with only a small subset of features, such as looking up a phone number or reading company news.

## RECRUITING ORGANIZATIONS TO PARTICIPATE

To recruit for this study, we posted a call for participation on our website, on social media, and in our weekly email newsletter, asking organizations to allow us into their offices and give us access to both the intranet and its users. In return, the organizations received a usability study and an evaluation of their intranet's usability, plus they were promised a copy of these final NN/g research reports.

We selected a varied sample of intranets (custom-built versus commercial-off-the-shelf, tech stack, use of social features, etc.) and a varied set of organizations (industry type, size, country) to ensure our findings could be applied to many situations and intranet types.

Each intranet we studied had its own goals, lifespan, history, content, number of pages, and user types to support. They all had interesting qualities, whether it was a particular implementation approach or a design or organizational challenge. Our overarching goal was to study a widely diverse group of organizations and intranets. Our more specific research goals for this study differed somewhat from those of most design and development teams.

## RESEARCH GOALS

In carrying out our research, we had several research goals:

- **Observe how users use the intranet and digital workplace tools**. This insight informed our guidelines and recommendations.
- **Learn which design elements make intranets and digital workplace tools easy or difficult to use and why.** We used this information to describe real user scenarios and write the guidelines found in this report about intranet design and the various tools, applications, and separate websites that make up the digital workplace.
- **Observe how teams and individuals manage intranet content.** This information informed recommendations for how to organize and audit intranet content.

- **Collect metrics about basic intranet tasks.** We collected these numbers to get a benchmark of intranet usability today. We also wanted designers to be able to reproduce the study at their own organizations and compare results from their intranets to the ones in our study.

Some organizations house critical workplace functions **on the intranet**, while others **link to separate websites and applications**. The intranet, in concert with these external systems and tools, make up what we call the **digital workplace**. Simply put, it's all the online systems a person uses to do their job, communicate with coworkers, and manage their well-being as an employee. Throughout this report, We'll refer to the intranet and various digital workplace tools (separate websites and applications).

**Digital Workplace**

Definitions, Principles, and Methods

All the online systems a person uses to do their job, communicate with coworkers, and manage their well-being as an employee

# Intranet Guidelines Report Series

## NIELSEN NORMAN GROUP'S INTRANET REPORT SERIES

This is one of the four report volumes generated from the findings gleaned from our intranet research studies. Based on these findings, we derived guidelines about many topics, each of which merited its own report.

The full **Intranet Usability Guidelines** series is available for purchase and download from our website.

Volume 1: Intranet Content Strategy, Presentation, and Governance

Volume 2: Intranet Information Architecture, Navigation, and Menus

Volume 3: Intranet Search for Content, People, and Tools

Volume 4: Intranet Branding, Visual, and Interaction Design

The entire report series contains guidelines for good intranet design, along with descriptions and examples from the companies that formally participated in our studies. We also drew our recommendations from the intranet knowledge gained through our client work and from running our Intranet Design Annual.

We hope that by studying the examples and guidelines in this report series, other designers will learn more about how to design usable intranets.

## About the Organizations in the Study

As the table below shows, we studied the usability of intranets at 57 different organizations from a wide variety of industries.

| NAME | INDUSTRY | LOCATION |
|---|---|---|
| ABB | Power & automation technology | Zurich (Switzerland) |
| Allen & Gerritsen | Strategic marketing | Watertown, MA (US) |
| Amazon.com | Online retailer | Seattle, WA (US) |
| American Airlines | Airline | Fort Worth, TX (US) |
| Antigenics Corp. | Pharmaceutical | Lexington, MA (US) |
| Atrium Health | Healthcare group | Charlotte, NC (US) |
| Avery Dennison | Manufacturing | Headquarters in Pasadena, CA (US); study conducted in Brea, CA (US) |
| Bayer CropScience | Crop protection | Research Triangle Park, NC (US) |
| British Red Cross | Nonprofit/humanitarian aid | London (UK) |
| Burns & McDonnell | Engineering | Kansas City, MO (US) |
| Bracknell Forest Council | Local government | London (UK) |
| Cathay Pacific | Airline | Lantau, Hong Kong (China) |
| Chick-fil-A | Restaurant chain | Atlanta, GA (US) |
| CIT Group, Inc. | Financial services | Livingston, NJ (US) |
| City of Calgary | Local government | Calgary (Canada) |
| Consumers' Association | Nonprofit/publication | London (UK) |
| Co-operators | Insurance | Guelph (Canada) |
| Currie & Brown | Construction risk management | London (UK) |
| Dell | Technology | Round Rock, TX (US) |
| DIRTT | Design-build construction | Calgary (Canada) |
| Dispatch Printing Company | Four media outlets (network, cable, and two radio stations) | Columbus, OH (US) |
| Dubai Chamber of Commerce & Industry | Government | Dubai (UAE) |
| Easter Seals, Inc. | Nonprofit/health and human services | Chicago, IL (US) |
| Elsevier | Science, technical, and health publishing | Amsterdam (The Netherlands) and Philadelphia, PA (US) |

| | | |
|---|---|---|
| Embry-Riddle Aeronautical University | Higher education | Daytona Beach, FL (US) |
| Eyeo GmbH | Software | Cologne (Germany) |
| First Solar | Energy | Perrysburg, OH (US) |
| Fortum | Energy | Espoo (Finland) |
| General Services Administration | Government agency | Washington D.C. (US) |
| HealthGrades | Technology/healthcare | Denver, CO (US) |
| Houses of Parliament | Government | London (UK) |
| Kaplan | Education and test preparation | New York, NY (US) |
| KeyBank | Bank | Cleveland, OH (US) |
| Kulicke & Soffa | Semiconductor | Willow Grove, PA (US) |
| Lower Colorado River Authority (LCRA) | Energy, water, parks, and community service | Austin, TX (US) |
| Luck Companies | Mining and stone retailing | Richmond, VA (US) |
| Mayo Clinic | Healthcare | Rochester, MN (US) |
| Millennium Pharmaceuticals | Biochem R&D | Cambridge, MA (US) |
| Nestlé Group | Food | Vevey (Switzerland) |
| New York Life Insurance | Life insurance | New York, NY (US) |
| Northern Alberta Institute of Technology | Technical school | Edmonton (Canada) |
| Microwave Data Systems (MDS) | Wireless networking | Rochester, NY (US) |
| NetApp | Computer storage | Sunnyvale, CA (US) |
| Rabobank International | Finance & banking | Utrecht (The Netherlands) |
| Royal National Lifeboat Institution | Charity | Poole (UK) |
| Salesforce.com | Customer relationship management | San Francisco, CA (US) |
| Scottish Government | Government agency | Edenborough (Scotland) |
| San Juan Unified School District | Public school district | Sacramento, CA (US) |
| Sharp HealthCare | Healthcare | San Diego, CA (US) |
| Shell UK (IT Intranet) | Energy, petrochemical oil | Study done in London (UK); but IT head office is in Houston, TX (US) |
| Sprint | Telecommunications | Overland Park, KS (US) |
| State of California Employment Development Department (EDD) | State government agency | Sacramento, CA (US) |
| Towers Perrin | Global professional services | Philadelphia, PA (US) |

| | | |
|---|---|---|
| U-Haul International, Inc. | Moving, transportation, manufacturing, and retail | Phoenix, AZ (US) |
| University Health Network (UHN) | Healthcare | Toronto, Ontario (Canada) |
| Vytra Health Plans | Managed healthcare | Melville, NY (US) |
| Wildcard Systems, Inc. | Financial services | Maitland, FL (US) |

# Authors & Acknowledgements

# Author Biographies

**Anna Kaley** is a Senior UX Specialist with Nielsen Norman Group. Before joining NN/g, Anna worked for more than 10 years in UX architecture and digital strategy. She has conducted complex user research and experience design for healthcare, agriculture, finance, tourism, retail, and engineering clients. Most recently, she worked at a large retailer where she was responsible for ecommerce UX in both B2C (business-to-consumer) and B2B (business-to-business) channels. Anna is skilled at using qualitative and quantitative research methodologies throughout the design process to drive conversion, increase revenue, and improve satisfaction. She also has expertise in digital media planning, search marketing, and graphic design.

Anna has held UX roles on internal product teams and in digital agencies of various sizes and understands the challenges that UX professionals face in both contexts. This familiarity helps her bring a well-rounded approach to her projects and instruction. Anna has a Bachelor of Journalism degree with an emphasis in strategic communication. She attended the University of Missouri, Columbia.

**Maria Rosala** is a Senior UX Specialist with Nielsen Norman Group. Maria has a decade of experience conducting UX research. At Nielsen Norman Group she provides research services and advice to clients across numerous industries including construction, fast-moving consumer goods, pharma, and education. Prior to joining NN/g, Maria worked as a UX researcher in the UK government, where she carried out research in the UK and internationally to improve numerous digital products and services, including internal casework systems, online visa applications, and public-facing websites.

Maria has conducted usability evaluations on a variety of intranets at public and private organizations in North America and Europe for the 4th edition of the *Intranet Guidelines Report.*

Maria has a BSc in Philosophy from the London School of Economics and Political Science and an MSc in Human-Computer Interaction and Ergonomics from University College London.

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# About NN/g

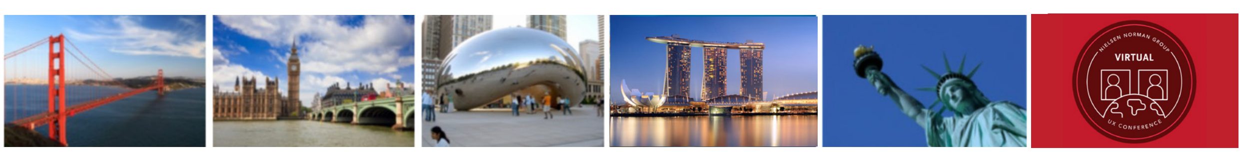
# A Leading Voice In The Field of User Experience Since 1998

- **Conducting groundbreaking research.** Every week, somewhere around the globe, NN/g team members are conducting user experience research. Our experts are experienced at executing dozens of research methodologies. We know when and how to apply each one, resulting in trusted insights that inform everything we do.
- **Evaluating interfaces of all shapes and sizes.** We've tested thousands of different user interface designs over the years. Every year we evaluate hundreds of interfaces, adding to our collective understanding of design and user behavior. Our experts work with users, interfaces and organizations from all over the world, widening our collective understanding.
- **Insights with more depth.** We don't have a narrow focus. Our observations are the result of the cumulative findings across a large volume and variety of circumstances, making them highly valid and comprehensive. For everything we publish, we combine our collective knowledge of longstanding patterns with any new findings we uncover from our targeted research studies. This allows us to interpret observations through the lens of the dozens of similar topics we've seen before to conclude their importance and validity. So this report is based not only on our most recent research on the topic, but more than 20 years of UX knowledge.

## OUR EXPERTS DO IT ALL

Our experts are researchers, educators, and UX Design practitioners all in one. Everything we do informs the 3 pillars of our business, research, training, and consulting.

- **Research** — Every person on our team conducts research. We tackle every topic in UX from the most evergreen challenges like information architecture to the most recent and emerging trends.




- **Training** — Our UX Conference training events take place in cities around the world and are also offered as virtual events that can be attended from anywhere.

  Attendees learn from NN/g experts and invited industry peers, leaving with practical skills that can be applied immediately.

  With more than [40 courses available](), there's something for everyone. Courses are taught in areas such as: research practices, design processes, working with stakeholder and product teams, among other things.

- **Certification** — Our UX Certification Program helps UX professionals quickly gain skills and credibility. By taking 5 courses and passing related exams, practitioners earn NN/g UX Certification and badge, a recognized credential in the industry.
- **In-house Training** — Many of our courses can be taught at your location and customized to fit your unique needs. In-house training is ideal for teams that want to spread user experience perspective throughout a large group and those working on large projects that need to kick start the creative process and head in the right direction.

- **Consulting** — Our experts are available for custom consulting. Our services include but are not limited to:
    - **Design Reviews and Competitive Analysis** (starting at $38,000 USD)
    - **Usability testing** (starting at $20,000)
    - **Benchmarking** (starting at $45,000)

## PUBLICATIONS AND CONTENT

Over the years, our experts have developed a comprehensive body of knowledge and UX resources. We've taken the results of our decades of research and distilled it down into actionable guidelines, best practices and proven methodologies.

### Articles and Videos

Over the years, we have created one of largest and most comprehensive sources of free user experience content and research insights.

- **Articles** — Each week we publish new articles on current UX topics available to practitioners around the world at no cost.
- **Videos** — In addition to our free articles, we produce a variety of short topical UX videos posted to our YouTube channel weekly.

### Reports

Our research library contains more than 60 published reports and books addressing a variety of topics including but not limited to the following:

- Doing UX in Agile Environments
- UX Design for specific audiences (e.g., children, college students, seniors, people with disabilities)
- Information Architecture

- B2B Websites
- Corporate Websites
- Ecommerce UX Design
- Marketing Email and Newsletters
- Intranets
- Non-Profit Websites
- University Website

Find all of our reports at https://www.nngroup.com/reports.

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