

Creating a Teams Incident Management Experience (IMX)

Experience Design Case Study

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Executive Summary

EY's Global Risk Management team engaged Enterprise Technology to assist in the definition and delivery of a streamlined Incident Management Experience (IMX). The aim of the project was to bring together a collection of information systems to create a cohesive experience – leveraging Microsoft Teams to facilitate efficiency, collaboration and overall management of events that impact EY staff or business operations.

Our research lead, abstract-to-concrete, user centered design approach, allowed for the successful creation of an MVP.

The tool was rolled out at EY's Global Security conference in Boston, MA and the MVP was very well received. Risk Management leadership was eager to socialize and grow the experience. Additional funding was appropriated.



Demand

EY's Global Risk Management team needed a unified collaboration solution that would pull together various Crisis Management components and information systems into a cohesive, streamlined experience.

Microsoft Teams was the desired delivery vehicle – capitalizing on EY's investment in the Global communications platform.

Target Users:

- OMP's
- Global Risk Management Directors
- Regional Security Managers
- Crisis Management Team members
- Security Travel & Intelligence Center (STIC) personnel

Key Systems to Integrate:

- Crisis Management Digital Tool
- Crisis Management & Business Continuity SharePoint resources and templates
- Everbridge mass notification system
- Microsoft Teams & more

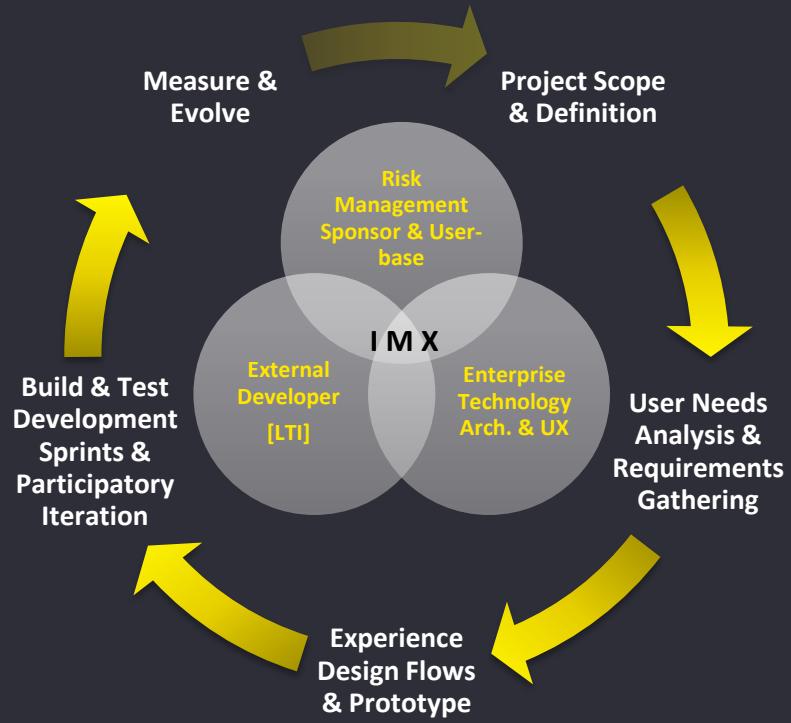
Ambition

- Cover > 700 Global locations
- Location-specific Crisis Management plans & Readiness checklists
- > 90 Incident type categories & associated templates
- Etc.

Work

Research, Define, Build & Verify a unified Microsoft Teams Incident Management Experience (IMX).

To achieve success, a user-centric design approach was employed.



Contribution & Deliverables:

- Product Development & Product Management Consulting
- Experience Design Consulting
- Collaborative Needs Analysis & Use Case Workshops
- Experience & Information Design Flows
- Concept Simulation & Multi-Fidelity Prototyping
- Written Requirements
- Solutions Architecture & Test Plans
- Production Asset Design
- Dev & QA Oversight with Audit Logs
- Product Evolution Roadmap & Concept Brainstorm

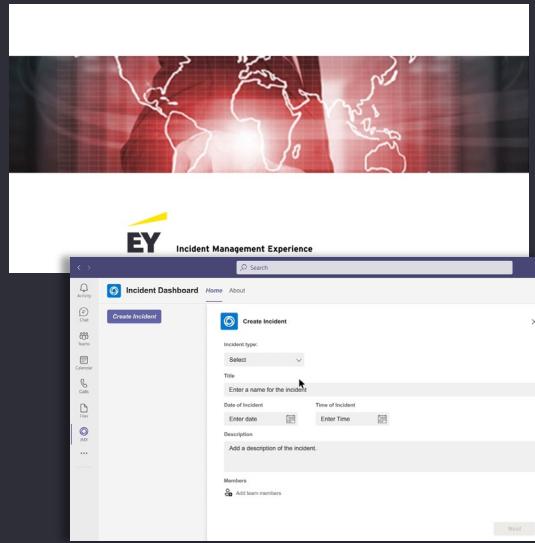


Defining & Developing IMX

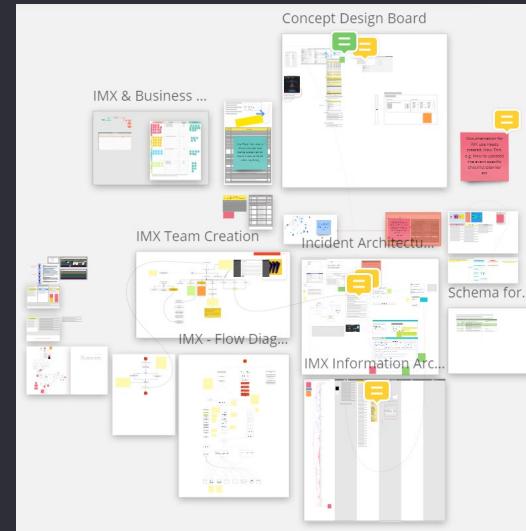
ABSTRACT



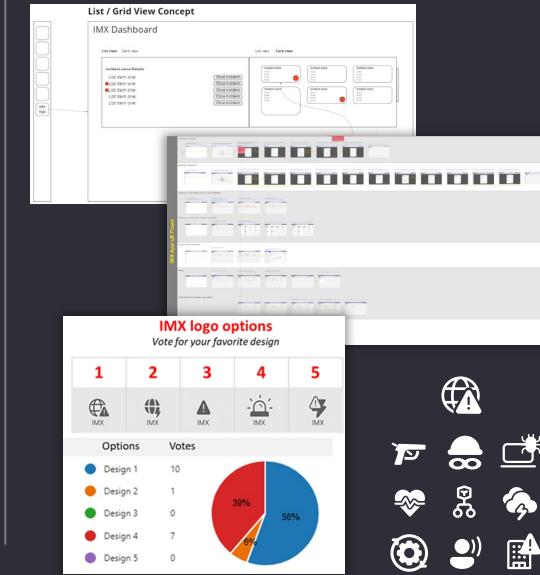
Ideation & Conceptualization



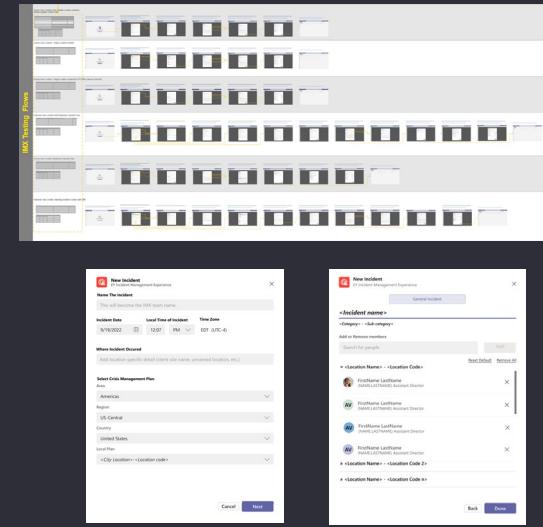
Requirements Gathering



Design & Develop



Test & Evolve



- Stakeholder kick-off meeting
- Concept sketch
- Video simulation/visualization
- Funding procurement ~\$85k Pro-dev engagement

- User research workshops
 - Persona identification
 - Use case generation
 - User flows
- Systems analysis & component inventory
- Requirements documentation

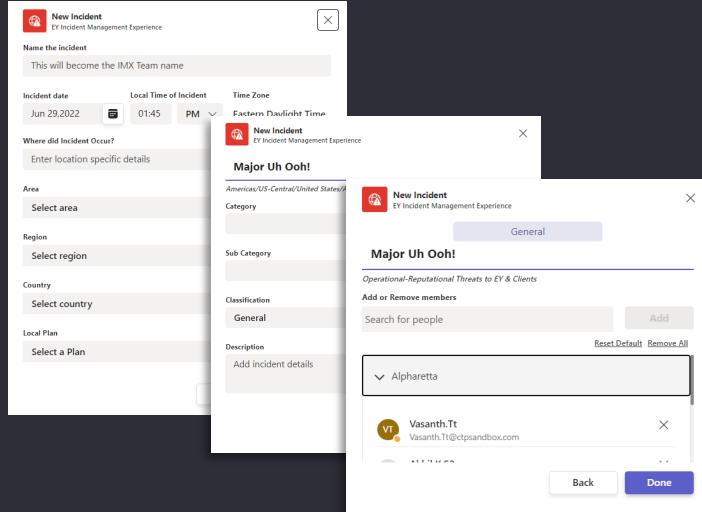
- Concept wireframes
- UX/UI design Figma prototype
- Collaborative design and review sessions
- Production asset creation

- Usability planning & research
- UI revisions
- UX QA development audits
- V2 Strategy & roadmap
- Post launch user research

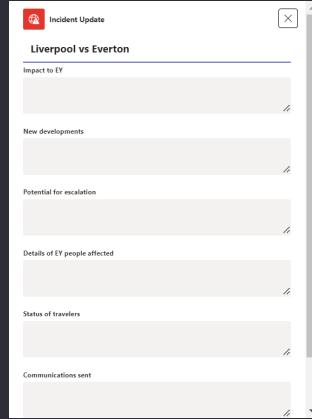
CONCRETE

IMX Functional Components

New Incident Module



Situation Report Module



IMX Dashboard List

Activity	IMX Home	About	
Incident	Category	Sub-Category	Location
Confidential - Compromised Documents	Cyber	Brand Protection	Alpharetta
San Jose - Tesla SRA	Natural Disaster	Wildfire / Drought / Extreme Heat	San Jose
Ukraine Invasion	Armed Conflict	International Conflict War	Wrocław
Gas Leak	Workplace	Building Emergency (Fire, Gas Leak, etc.)	Toledo
Covid-19	Health	Epidemic / Pandemic	Global
Test - Hurricane X	Natural Disaster	Cyclone / Hurricane	Alpharetta, Charleston, Charlotte, Atlanta, Cha...

Automated Standardized Tab Taxonomy with Dynamic Tasks Assignment

The screenshot shows a Microsoft Teams channel with tabs for 'General', 'Posts', 'Files', 'Tasks', 'CM & BC', 'Everbridge', 'Intelligence', and 'Resources'. The 'Tasks' tab is active, displaying a grid of tasks assigned to various team members. The tasks are categorized by role: CMT Leader, Brand, Marketing and Communications, Client-services, CMP Administrator, and EY Technology. Each task has a 'Done' button. The tasks are color-coded by priority: green for 'Event Specific', blue for 'General', and orange for 'CMT Specific'. The tasks are dynamic, reflecting the current state of the incident response plan.

IMX Dashboard Incident Cards

The screenshot shows the IMX dashboard with multiple incident cards displayed in a grid. The cards include:

- Compromised Documents**: General Incident, Cyber - Brand Protection. Created: 10/10/2022. Primary RSM / SPOC: Dan.J.Nocedal@ey.com. Secondary RSM / SPOC: jung.onkoh@ey.com.
- San Jose - Tesla SRA**: General Incident, Confidential - Natural Disaster. Created: 10/10/2022. Primary RSM / SPOC: Dan.J.Nocedal@ey.com. Secondary RSM / SPOC: jung.onkoh@ey.com.
- Ukraine Invasion**: General Incident, Armed Conflict - International Conflict War. Created: 10/10/2022. Primary RSM / SPOC: Dan.J.Nocedal@ey.com. Secondary RSM / SPOC: jung.onkoh@ey.com.
- Gas Leak**: General Incident, Workplace - Building Emergency (Fire, Gas Leak, etc.). Created: 10/10/2022. Primary RSM / SPOC: Dan.J.Nocedal@ey.com. Secondary RSM / SPOC: jung.onkoh@ey.com.
- Covid-19**: General Incident, Health - Epidemic / Pandemic. Created: 10/10/2022. Primary RSM / SPOC: Dan.J.Nocedal@ey.com. Secondary RSM / SPOC: jung.onkoh@ey.com.
- Hurricane X**: General Incident, Natural Disaster - Cyclone. Created: 10/10/2022. Primary RSM / SPOC: Dan.J.Nocedal@ey.com. Secondary RSM / SPOC: jung.onkoh@ey.com.

IMX Administration

Templates & Resource Management:

- Microsoft Planner Tasks templates for incident category and sub-category management provides customization and extensibility
- Identification of event specific tasks, differentiated from standard tasks
- Task assignment by Crisis Management Team role
- IMX SharePoint directories house referenced soft copies of plans and resources for download to further business continuity efforts

Office.com > IMX Administration via Microsoft Planner

The screenshot displays the Microsoft Planner interface for IMX Administration. On the left, a sidebar shows pinned items such as 'IMX Actions Bucket Template' and 'IMX Action Template'. The main area is a 'Board' view with four columns: 'CMT Leader', 'Brand, Marketing and Communications', 'Client-services', and 'CMP Administrator'. Each column contains a list of tasks. For example, under 'CMT Leader', there are several 'Event Specific' tasks related to media response and communications. The interface includes navigation tabs at the top (Board, Charts, Schedule) and bottom (List, Board, Charts, Schedule), as well as filter and group-by-bucket options.

Teams IMX team Crisis Management Plan tasks assignment example



Value

IMX MVP was rolled out at EY's Global Regional Security conference in Boston , MA. The response was overwhelmingly positive by all in attendance.

Regional Security Managers indicated this was exactly the type of tool they have been looking for.

Global Risk Management leadership requested expedited additions to support Global use cases at launch.

A desire to commercialize the solution has been conveyed.

Funding for v2.0 and road mapped functionality was appropriated.

IMX success sparked additional interest from other teams across the firm looking to deploy similar purpose-built, bespoke experiences for their functional area.

Opportunities

- Risk Management – Data Protection Issues – Global Data Protection
- Canada Tax – Engagement Teams

“

Jay takes the opportunity to listen and really understand the needs of the stakeholders and then develops a technological idea to meet the need of the team. His years of experience outside EY has really complimented the work he's doing in the firm and has provided real value as we work through this technological solution.

Dan Y.

U.S. Central Regional Security Manager



“

Jay consistently adds value and does a great job in challenging the team's assumptions. Asking us to think of alternative approaches, helps us come to a better final product and to better understand why we are making certain decisions.

Randolph M.

Global Physical Security & Technology Strategic Lead

“

Jay really listens to understand the needs of stakeholders and builds effective solutions to meet those requirements.

Edward H.

IMX Project Manager - Global Security



“

Jay has provided valuable feedback by making Global Security aware of a gap in the existing Everbridge Mass Notification System. Doing so has made us aware of a glitch in need of prompt action and repair.

Sherry F.

Crisis Management & Business Continuity - Global Security

“

Jay's contributions will simplify the process for our stakeholders many of which are senior leaders across the EY global organization.

Lisa T.

Director Global Business Resilience



“

This is the best Crisis Management software
I've ever seen.

Bruno K.

Director Security Risk Management Leader - Europe West

This is going to change Crisis Management at EY.

Ankush M.

Director Risk Management – Global Delivery Services



IMX Roadmap Highlights & Next Steps

Post launch Telemetry/Metrics changes & Research lead voice-of-the-user enhancements.

Automation

- Intelligent Situation Reports which pull details entered by user at incident creation point
- Intelligent After-Action Reports at incident closeout that leverage user input while the incident is being managed
- Crisis Management Plan generation for locations with Readiness Checklists only – Helping Risk Management achieve near 100% participation from smaller EY locations
- Leadership reports

Functionality

- Geographic localization
- “Everbridge-like” capability creation
- Centralized backends of IMX and Digital Crisis Management Tool
- Incident Update highlights in card view
- Incident Data export to excel
- Improved mobile experience
- General usability enhancements considered “nice-to-have” for MVP

And more...