

Creating a Teams Incident Management Experience (IMX)

Experience Design Case Study

J. Riggin

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

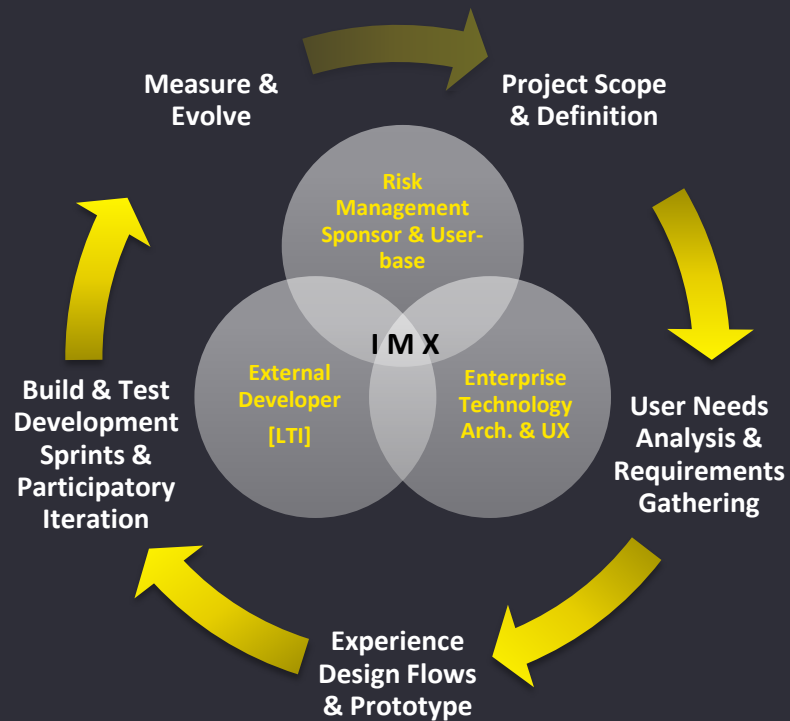
Ambition

- 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:

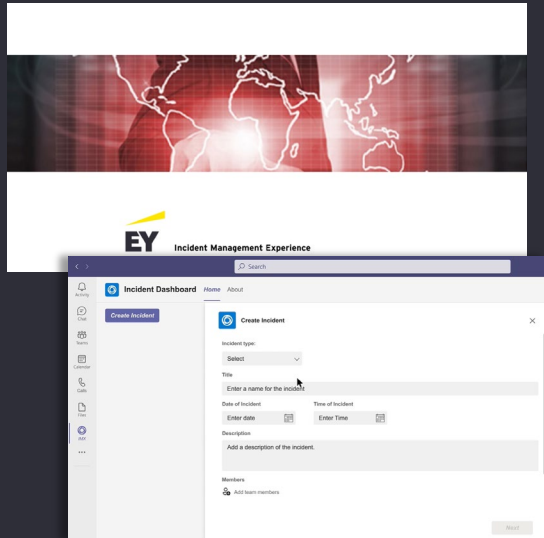
- Product Development & Product Management Consulting
- Experience Design Consulting
- Collaborative Needs Analysis & Use Case Workshops
- Experience & Information Design Flows
- Concept Simulation & Multi-Fidelity Prototyping
- Written Requirements
- Solutions Architecture & Test Plans
- Production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



Defining & Developing IMX



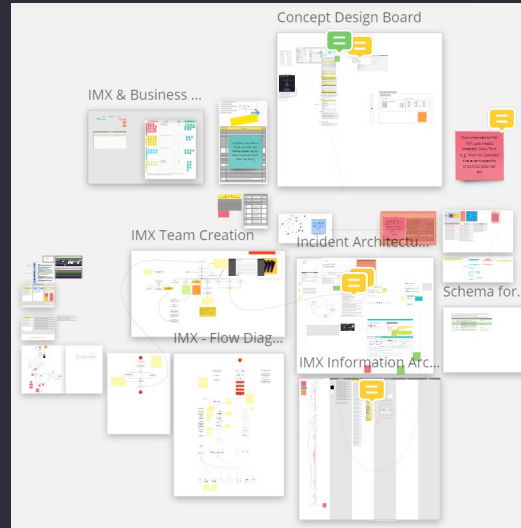
Ideation & Conceptualization



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



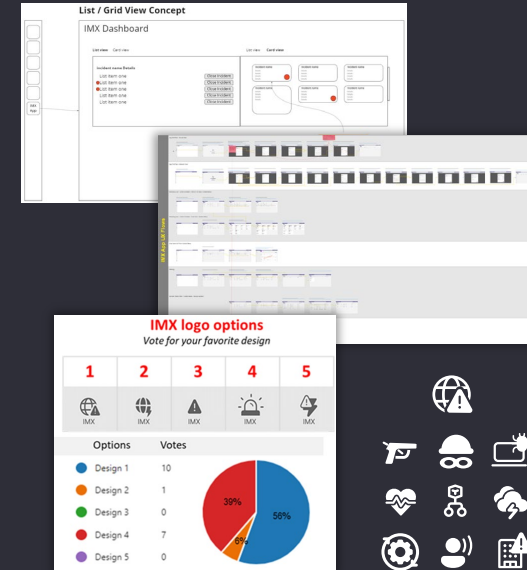
Requirements Gathering



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



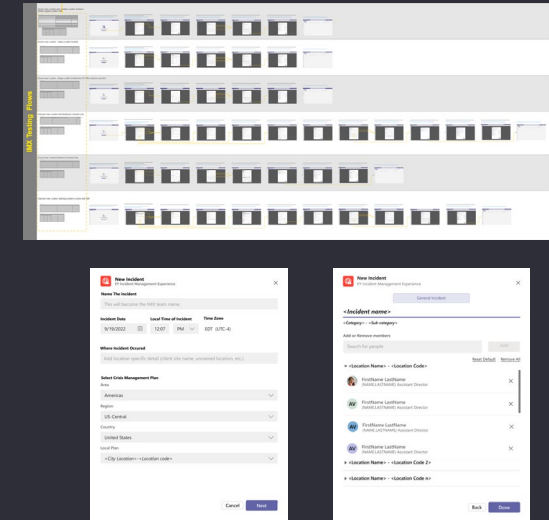
Design & Develop



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



Test & Evolve



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

ABSTRACT

CONCRETE

IMX Functional Components

New Incident Module

New Incident

EV Incident Management Experience

Name the Incident

This will become the IMX Team name

Incident date

Jun 29, 2022

Local Time of Incident

01:45 PM

Time Zone

Eastern Daufinht Time

Where did Incident Occur?

Enter location specific details

Area

Select area

Region

Select region

Country

Select country

Local Plan

Select a Plan

New Incident

EV Incident Management Experience

Major Uh Ooh!

Americas/US-Central/United States

Category

General

Sub Category

Classification

General

Description

Add incident details

New Incident

EV Incident Management Experience

Major Uh Ooh!

Operational-Reputational Threats to EV & Clients

Add or Remove members

Search for people

Alpharetta

Vasanth.Tt

Vasanth.Tt@ctpsandbox.com

Back

Done

Situation Report Module

Incident Update

Liverpool vs Everton

Impact to EV

New developments

Potential for escalation

Details of EV people affected

Status of travelers

Communications sent

IMX Dashboard List

Incident	Category	Sub Category	Location	Created	Status
Confidential - Compromised Documents	Cyber	Brand Protection	Alpharetta	Nov 11, XXXX	Active
San Jose - Tesla SRA	Natural Disaster	Wildfire / Drought / Extreme Heat	San Jose	Aug 31, XXXX	Active
Ukraine Invasion	Armed Conflict	International Conflict / War	Wroclaw	Feb 10, XXXX	Active
Gas Leak	Workplace	Building Emergency (Fire, Gas Leak, etc.)	Toledo	Oct 23, XXXX	Active
Covid-19	Health	Epidemic / Pandemic	Global	Oct 11, XXXX	Active
Test - Hurricane X	Natural Disaster	Cyclone / Hurricane	Alpharetta, Charleston, Charlotte Amalie, Cha...	June 7, XXXX	Active

IMX Dashboard Incident Cards

Confidential

Compromised Documents

Cyber - Brand Protection

Created activities

Location - Details from test field

Area: Americas

Region: US Central

Country: United States

Location City: Alpharetta

Primary RSM / SPOC: Dan L. Voca@ev.com

Secondary RSM / SPOC: Dan L. Voca@ev.com

General Incident

San Jose - Tesla SRA

Natural Disaster - Wildfire / Drought / Extreme Heat

Created activities

Location - Details from test field

Area: Americas

Region: US West

Country: United States

Location City: San Jose

Primary RSM / SPOC: Joseph.Livach@ev.com

Secondary RSM / SPOC: Dan L. Voca@ev.com

General Incident

Ukraine Invasion

Armed Conflict - International Conflict / War

Created activities

Location - Details from test field

Area: Europe

Region: Poland

Country: Poland

Location City: Wroclaw

Primary RSM / SPOC: Peter.D.Nicola@ev.com

Secondary RSM / SPOC: Peter.D.Nicola@ev.com

General Incident

Gas Leak

Workplace - Building Emergency (Fire, Gas Leak, etc.)

Created activities

Location - Details from test field

Area: Americas

Region: US Central

Country: United States

Location City: Toledo

Primary RSM / SPOC: Dan L. Voca@ev.com

Secondary RSM / SPOC: Geoff.Thomas@ev.com

General Incident

Covid-19

Health - Epidemic / Pandemic

Created activities

Location - Details from test field

Area: Americas

Region: US Central

Country: United States

Location City: Global

Primary RSM / SPOC: Dan L. Voca@ev.com

Secondary RSM / SPOC: Geoff.Thomas@ev.com

Test

Hurricane X

Natural Disaster - Hurricane / Cyclone

Created activities

Location - Details from test field

Area: Americas

Region: US Central

Country: United States

Location City: City

Primary RSM / SPOC: Dan L. Voca@ev.com

Secondary RSM / SPOC: Geoff.Thomas@ev.com

Automated Standardized Tab Taxonomy with Dynamic Tasks Assignment

Microsoft Teams

Search

Teams

6 MLP Test

ccc

mmbj

flood south of cincinnati

Earthquake London

Earthquake Alabama and Florida

Uh ooh!

Uh ooh 2!

My Multi Team CMP Example

Earthquake Atlanta

Earthquake McFiey in Atlanta

General

Earthquake London

Liverpool vs Everton

AK test create 2906 edited

Hidden teams

Join or create a team

General

Posts

Files

Tasks

CM & BC

Everbridge

Intelligence

Resources

Group by Bucket

Filter

List

Board

Charts

Schedule

CMT Leader

+ Add task

Event Specific

EV media response not likely required (unless there are EV casualties) - Brand or reputational issues not likely, as EV would be perceived as the victim - Review ongoing marketing or media campaigns and identify if messages are inappropriate given current situation

Event Specific

Remind EV people of their responsibility per the EV Media and Social Media Policy and the sensitivity to those directly impacted

Event Specific

Prepare and issue leadership communications, locally from the CMT in the impacted city and from the Region. Audiences should include: EV people working or doing business in the impacted city - All people more widely

Event Specific

What is the current and primary

Brand, Marketing and Communications

+ Add task

Event Specific

EV media response not likely required (unless there are EV casualties) - Brand or reputational issues not likely, as EV would be perceived as the victim - Review ongoing marketing or media campaigns and identify if messages are inappropriate given current situation

Event Specific

Consider communications, methods and frequency of updates - Crisis Sharepoint page (internal) - Mass notification system (Everbridge) to alert people of updates - Local and Region Leadership using the Global List Management System (GLMS) email/Vocema

Event Specific

Remind EV people of their responsibility per the EV Media and Social Media Policy and the sensitivity to those directly impacted

Event Specific

Prepare and issue leadership

Client-services

+ Add task

At the direction of the CMT Leader, notify the team to be on standby for a potential CMT activation

Coordinate and escalate client-serving needs

Work with Communications to prepare client communications

Monitor client inquiries and coordinate and track responses

Event Specific

Impact to EV people or operations (e.g., getting to work)

CMP Administrator

+ Add task

Ensure CMT members have a recent version of the CMP

Confirm that a scribe has been identified and can complete the Situation Report (Sitrep) form and CMT Task List form and track actions to resolution

Coordinate and communicate with the CMT Leader to review the situation status

Help coordinate the assembly of the EOC, if required

Facilitate ability for team to meet virtually and access plans, contact lists, and documentation

Help manage ongoing assessment and recovery and update the CMT

EV Technology

+ Add task

Coordinate with damage assess

Provide technical

Manage technical automated DR activated properly

Redirect phone office, if needed

Assess technical and inform EV 1 Management

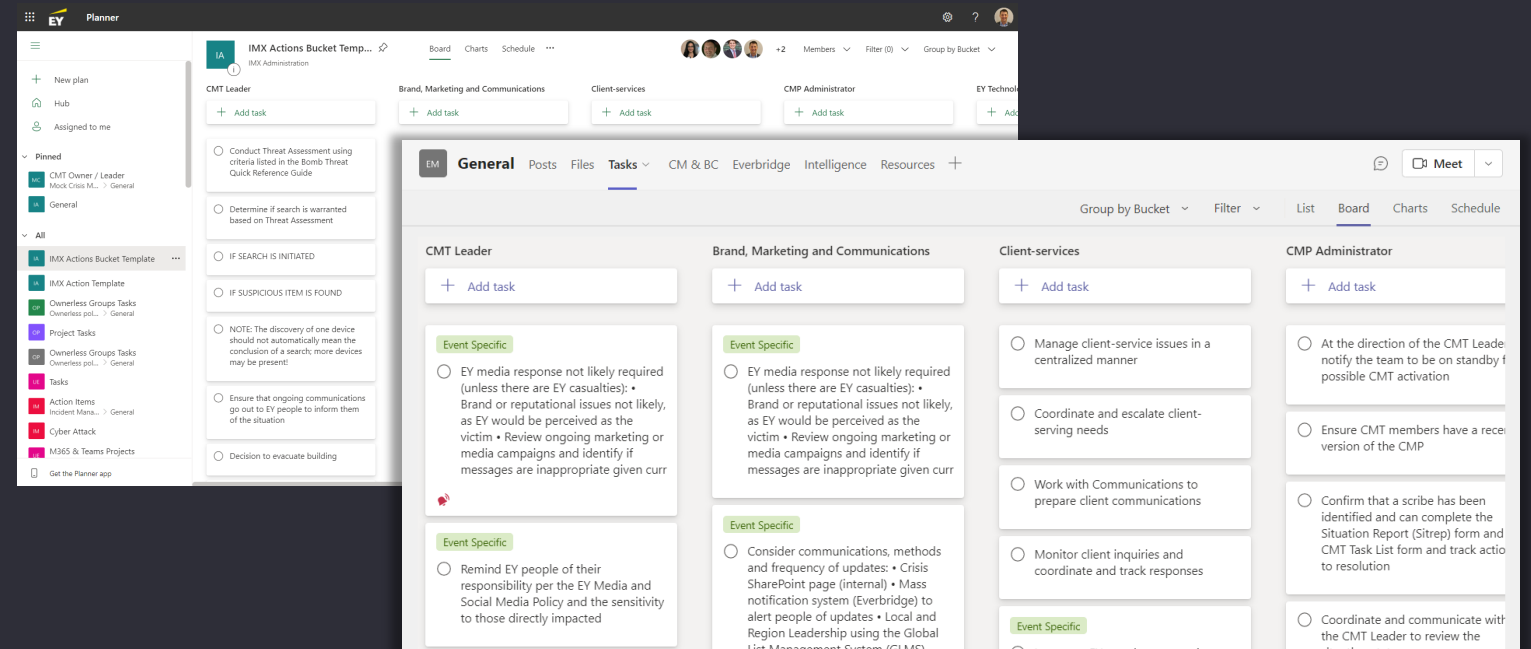


IMX Administration

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



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 to 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 Leader Lee Arden
- 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...