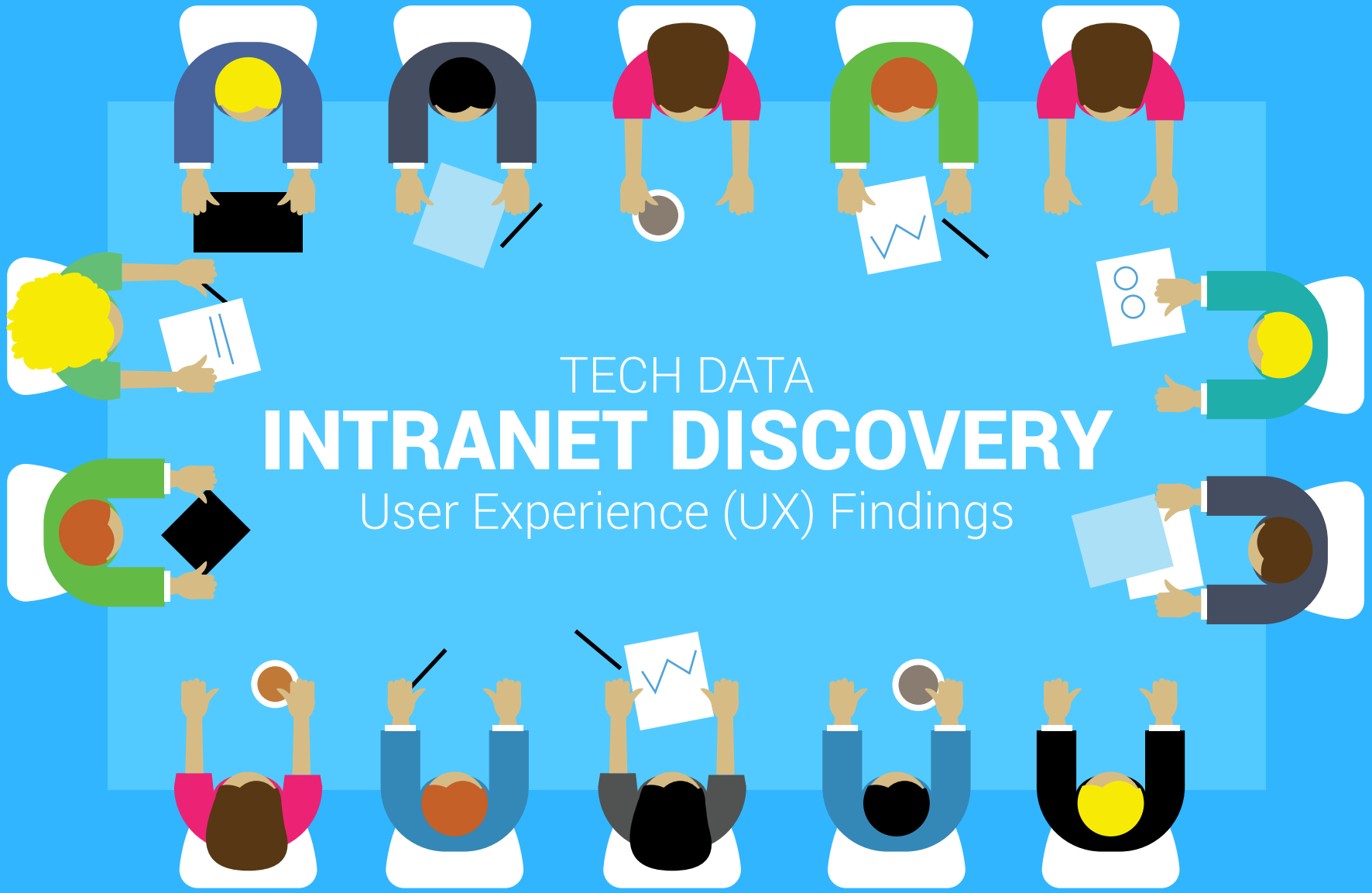

TECH DATA

# INTRANET DISCOVERY

## User Experience (UX) Findings

TECH DATA INTRANET DISCOVERY

# OVERVIEW

## Project Background

Tech Data is starting a new effort to redesign the intranet using SharePoint. Tech Data envisions a new, more modern corporate intranet that enables employees to quickly find content and collaborate to support business needs while improving engagement and productivity.

## Purpose

The purpose of the UX Findings Report is to present the data collected from the sessions and activities, to help facilitate the visual direction and information architecture of the new intranet portal. Taking these findings into account, Stakeholders can better understand the audience and make educated decisions based on neutral data, while maintaining Tech Data's professional relationship with its employees.

## Important Details

- Presentation and interpretation of results
- End User and Stakeholder comparison analysis
- Integrated summation of results

TECH DATA INTRANET DISCOVERY

# INTERVIEWS

## Session Overview

Conversational style sessions held to learn more about how users currently interact with the intranet including their goals, motivations, and pain-points.

## Meeting Outcome

The discussions were focused on eliciting user needs, current issues, and the generation of ideas for the new and improved functionality. The information gleaned from this session provided neutral data helping to guide the redesign to fulfill actual user needs.

## Who Attended

Stakeholders and End Users

TECH DATA INTRANET DISCOVERY

# INTERVIEWS: END USER

## Intranet Current State

- Search Unavailing
- Obsolete Content
- Browser Incompatibilities
- Confusing Interface
- Too Many Portals
- Content Nested Too Deep
- No Breadcrumb
- No Integration with Processes
- Lack of Ownership
- Outdated Visuals
- No Engagement/Interaction (Flat/One-Sided)

## Desired Future State

- Current & Relevant Information
- Progressive/Slick/Simple Design
- More Useful Features & Widgets
- Surfaced Content Maps
- Robust Search and Navigation
- Minimized Barriers/Silos
- Increased Productivity & Mobility
- Empowered Users/Personalized Content
- Department Pages & Wiki's
- Pronounced Culture Center (Fun, Video, Activities)
- OneNote & Calendar Integration
- Consistency
- Ownership & Accountability

## User Interview Summary

The Users stressed the importance of creating a clean, personalized, and friendly user experience.  In addition, the consensus was that outdated content and irrelevant information lead to the lack of use. The goal is to keep users engaged longer, provide them with current and relevant information quickly, while promoting collaboration across the organization and increasing individual productivity.

TECH DATA INTRANET DISCOVERY

# INTERVIEWS: STAKEHOLDER

## Intranet Current State

- Outdated Content/Static (Non Collaborative)
- No Governance
- Lack of Engagement
- Confusing Interface
- Complicated Information Architecture
- No Branding
- Lack of Audience
- Lack of Consistency
- Lack of Personalization
- Nonfunctional Search
- No External Access (VPN only)

## Future State Vision

- Fresh Information
- Global Consolidation
- Streamlined Design
- Targeted Content
- Robust Search and Navigation
- Established Governance
- Minimized Barriers/Silos
- Self-Serve
- Mobility
- Increased Productivity
- Realized Business Value

## Stakeholder Interview Summary

The Stakeholders stressed the importance of a controlled, centralized, global platform that promotes collaboration, usage through current and targeted content, accessibility across multiple devices, a simplistic interface and navigation, and place for employees to quickly find relevant information.

TECH DATA INTRANET DISCOVERY

# INTERVIEWS: THE SWEET SPOT

## Persona & Themes Summary

The UX discovery participants represented a combination of both the end-user and project stakeholder viewpoints with varying levels of intranet involvement. After reviewing the data provided, common themes appeared while aggregating the goals, frustrations, and improvement suggestions. These curated themes should be used to guide The Hub redesign efforts:

## Entice

- Provide users with a functional and visually enticing intranet that promotes Tech Data's brand aligned with the visionary future state supported by the end users.
- Showcase content from other areas on the Home Page using teasers and snippets to help drive users to areas they might otherwise miss.
- Provide context and clues about where links will take a user if followed.
- Use consistent naming conventions for titles, topics, and pages when referring to other areas. Avoid jargon, acronyms or abbreviations.

## Collaborate

- Empower visitors with options to share content with each other.
- Enable commenting and social communication around news, announcements or stories.

TECH DATA INTRANET DISCOVERY

# INTERVIEWS: THE SWEET SPOT

## Streamline

- Navigation to specific areas of the site should be simple; use of consistent navigation patterns.
- Deeply consider how much content should exist on any given page. If everything is the most important, then nothing is the most important.
- Eliminate out-of-date or redundant documentation and forms to avoid confusion and provide a sense of stability for users.

## Engage

- Utilize visual affordance to the areas most used or needed to guide the users eye.
- Provide a personalized experience through targeted and optional content and apps.
- Encourage accessibility through mobile - access anywhere, anytime.

## Summary

The Hub users would greatly benefit from an improved Information Architecture, including a drastic reduction in the amount of links and the combining of the multiple navigation areas into a central location. Improvements to the User Interface should include consistent styling (headlines, link, body text, images, pages layouts and templates), with a clean, personalized, and approachable Home Page visual design; an interface with components/apps that support and promote daily usage. Better integration with existing applications and accessibility outside of VPN that will promote both usage and collaboration, while increasing productivity.

TECH DATA INTRANET DISCOVERY

# CARD SORTING ACTIVITY

## Session Overview

These sessions included a participatory activity that was used to help evaluate the existing Information Architecture across Tech Data's current intranets.  During these group sessions, participants helped organize physical cards listing main, sub, and tertiary pages into categories that provided an optimal navigation experience for users.

## Meeting Outcome

Each group of sorted cards created was discussed as a group, then merged into a "final" state, ultimately resulting in the basis for the updated Information Architecture.

## Who Attended

Stakeholders and End Users

TECH DATA INTRANET DISCOVERY

# CARD SORTING: END USER

- [My Department]
- Employee Central
  - **Benefits & Services**
  - **Employee Classifieds**
  - **Employee Engagement**
    - Culture Club
    - Community
    - Volunteering
  - **New Employee Orientation**
  - **Performance & Development**
  - **TD Careers**
  - **Training**
  - **Work/Life Balance**
    - Wellness Center
- Departments
  - **AIS**
  - **Corp Ops**
    - After Sales Mgmt
    - Budget/Contracts/TS Comp
    - Business Continuity Management
    - Corp Services/Facilities
    - Office Services/Procurement
  - **Credit Services**
  - **Customer Care**
  - **Finance/Accounting**
    - Accounting
    - Employee Shareholder Services
    - Finance/Tax/Treasury
  - **HR**
    - HR Comp
  - **Investor Relations & Corp Communications**
  - **ISCS**
  - **IT**
    - Electronic Commerce
    - IT Security/IT Services
  - **Legal**
    - Compliance
  - **Product Marketing**
    - Channel Services/Divisions
    - PM Comp/PM Profit/Vendors
  - **Purchasing**
  - **Sales**
    - Divisions/Org. Chart/Profit
    - Policies & Procedures/Sales Comp
  - **TD Agency**
  - **TD Mobility**
  - **Technical Services**
    - Business Solution Center
  - **Travel/Expenses**
- Corporate Overview
  - **Locations**
  - **Ethics/Code of Conduct**
  - **Mission Vision & Values**
  - **Executive Leadership**
  - **Press Center**
  - **Standards of Internal Controls**

TECH DATA INTRANET DISCOVERY

# CARD SORTING: STAKEHOLDER

## Work Connect

- **Café & Catering**
- **Travel Portal**
  - Expenses
- **Procurement**
- **Office Services**
- **Facilities**
- **Applications/Tools**
  - Forms Bank
  - Acro Finder
  - Templates/Collt
- **Emergency Central**
- **Management ***
  - Mgrs Resource Guide *

## Departments

- **Prod Marketing**
  - Purchasing
  - Vendors
  - TD Mobility
- **AIS**
  - Technical Services
  - Solution Center
  - Customer Education
- **HR**
- **ISCS**
- **Corp Comm**
- **IT**
  - IT Security
  - IT Helpdesk
  - IT Services
  - IT Operations
  - Electronic Commerce
  - PMO
- **Legal**
- **Sales**
  - Sales Divisions
  - Tech Data Customer Care
- **Pricing**
  - Biz Intelligence Reports
  - PM Profit
  - Sales Profit
- **Finance/Acct**
  - Credit Services
  - Tax
  - Treasury
- **Agency**
  - Brand Identity & Templates

## Policies & Procedures

- **IT Security**
- **Compliance**
- **Standards of Internal Control**
- **Travel & Expense Policy**

## Who We Are

- **Mission, Vision & Values**
- **Ethics**
- **Exec Leadership**
- **Locations**
- **International Activities**
- **Global Resources**
- **Press Center**
- **Internal Announcements**
- **Brand Guide??**

## Employee Connect

- **Employee Recog**
- **Diversity and Inclusion**
- **New Employee Orient**
- **Work/Life Balance**
  - Comm & Vol
  - Wellness
  - Flex
- **Employee Classifieds**
- **Manage My Career**
  - Wingspan X
  - training
  - TD Careers
  - Perm & Develop
- **Bad Box**
- **Employee Discounts**
- **Employee Benefits**
- **Compensation**
- **Payroll/PTO Work Center X**
- **SmartBen X**
- **Kronos X**
- **ICIMS X***

TECH DATA INTRANET DISCOVERY

# CARD SORTING: THE SWEET SPOT

- [My Department]
- Departments
  - **Agency**
    - Brand Identity & Templates
  - **AIS**
    - Technical Services
    - Solution Center
    - Customer Education
  - **Corp Comm**
  - **Finance/Acct**
    - Credit Services
    - Tax
    - Treasury
  - **HR**
  - **ISCS**
  - **IT**
    - IT Security
    - IT Helpdesk
    - IT Services
    - IT Operations
    - Electronic Commerce
    - PMO
  - **Legal**
  - **Pricing**
    - Biz Intelligence Reports
    - PM Profit
    - Sales Profit
  - **Prod Marketing**
    - Purchasing
    - Vendors
    - TD Mobility
  - **Sales**
    - Sales Divisions
    - Tech Data Customer Care
- Employee Connect
  - **Bad Box**
  - **Compensation**
  - **Diversity and Inclusion**
  - **Employee Benefits**
  - **Employee Classifieds**
  - **Employee Discounts**
  - **Employee Engagement**
    - Culture Club
    - Community
    - Volunteering
  - **Employee Recognition**
  - **ICIMS X***
  - **Kronos X**
  - **Manage My Career**
    - Wingspan X
    - Training
    - Careers
    - Perm & Develop
  - **New Employee Orient**
  - **Payroll/PTO**
  - **SmartBen X**
  - **Work Center X**
  - **Work/Life Balance**
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    - Flex
- Work Connect
  - **Applications/Tools**
    - Acro Finder
    - Forms Bank
    - Templates/Collt
  - **Café & Catering**
  - **Emergency Central**
  - **Facilities**
  - **Management ***
    - Mgrs Resource Guide *
  - **Office Services**
  - **Procurement**
  - **Travel Portal**
    - Expenses
- About
  - **Ethics/Code of Conduct**
  - **Executive Leadership**
  - **Global Resources**
  - **Internal Announcements**
  - **International Activities**
  - **Locations**
  - **Policies & Procedures**
    - **IT Security**
    - **Compliance**
    - **Standards of Internal Control**
    - **Travel & Expense Policy**
  - **Press Center**
  - **Who We Are**
    - Mission, Vision, & Values
    - Executive Leadership

## Overview

The site map represents the aggregated/proposed information architecture for The Hub geo landing page.

• This site map is intended to provide guidance based on the results of the card sorting activity only. This is not a representation of the final/collective site map.

TECH DATA INTRANET DISCOVERY

# TASK PRIORITY

## Session Overview

These sessions included a participatory activity that was used to learn more about which user interface components are used most often and how important the components are related to the day-to-day activities at Tech Data.

## Meeting Outcome

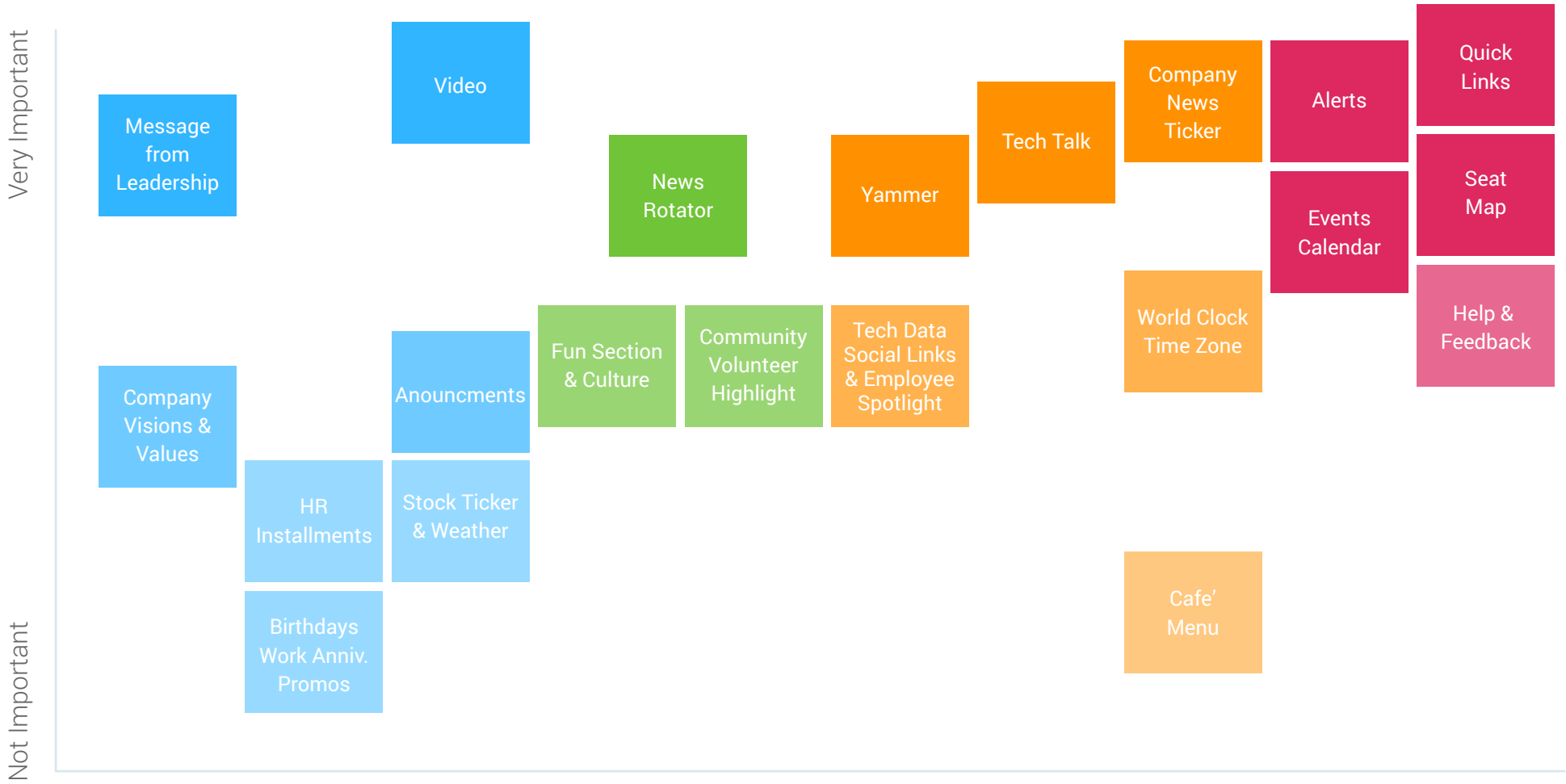
The activity helped to identify and rank which user interface components should take precedence on “The Hub” intranet home page.  The information gleaned from these sessions provided neutral data helping to guide layout decisions for the home page redesign effort.

## Who Attended

Stakeholders and End Users

TECH DATA INTRANET DISCOVERY

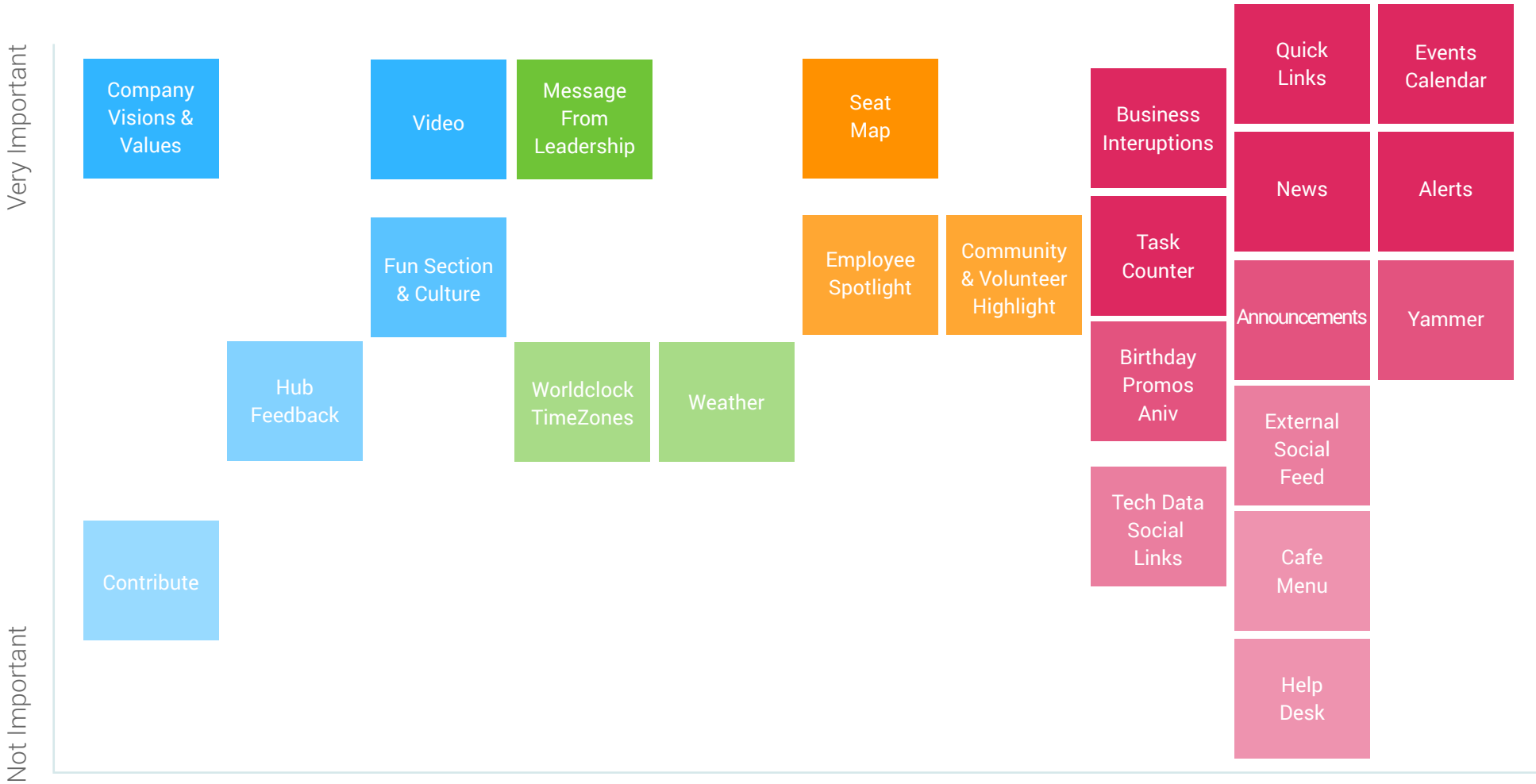
# TASK PRIORITY: END USER




** Colors and opacity are a visual representation of frequency and importance.*

TECH DATA INTRANET DISCOVERY

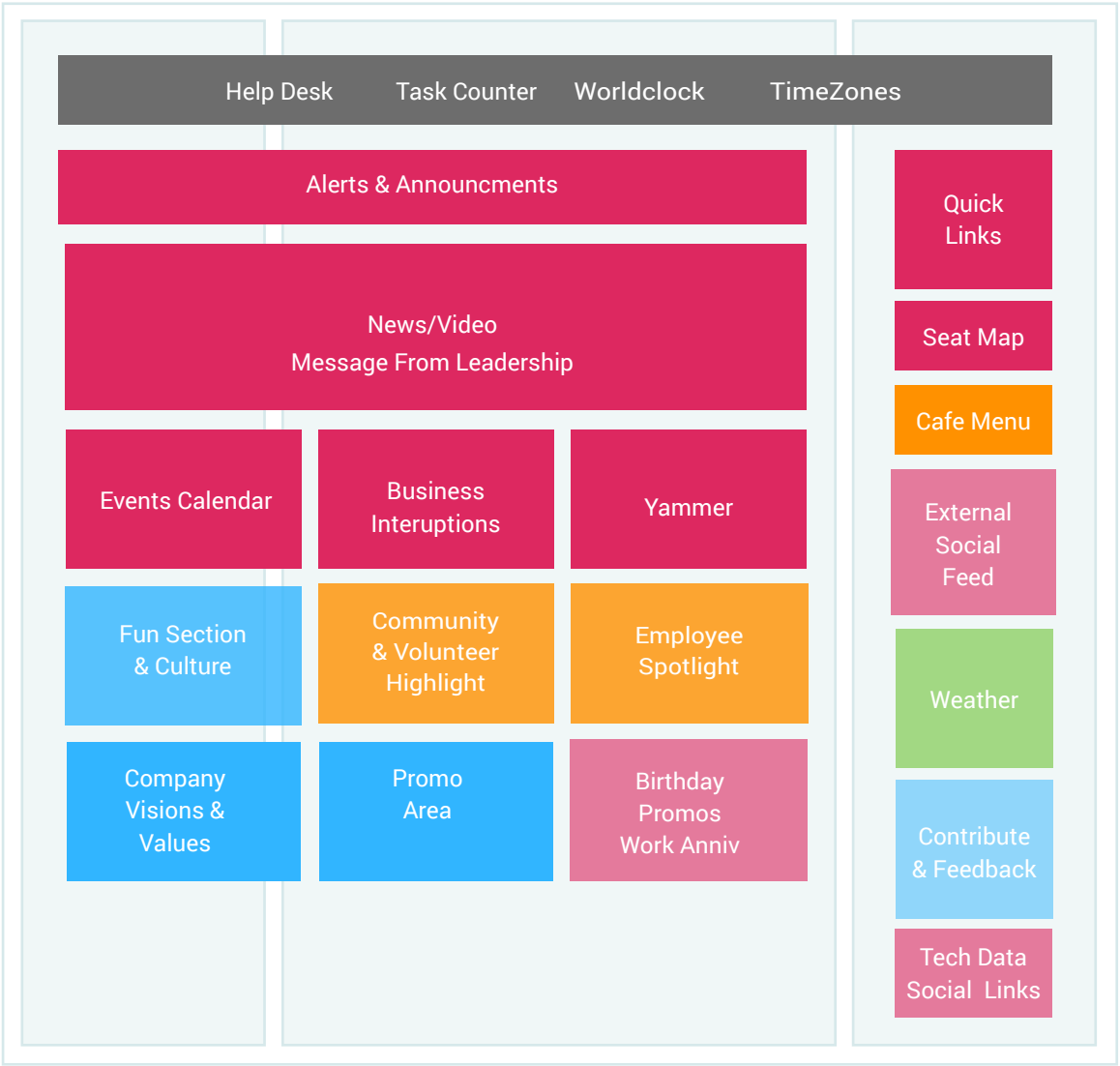
# TASK PRIORITY: STAKEHOLDER




** Colors and opacity are a visual representation of frequency and importance.*

TECH DATA INTRANET DISCOVERY

# TASK PRIORITY: THE SWEET SPOT




## Overview

The wireframe visually represents an example layout of the components/apps that are recommended for the US Landing Page, based on frequency of use and level of importance in relation to day-to-day activities.

* This layout is intended to provide visual guidance based on the results of the task priority activity only. This is not a representation of the final layout or visual design.

** Colors and opacity are a visual representation of frequency and importance.*

TECH DATA INTRANET DISCOVERY

# MESSAGE ARCHITECTURE

## Session Overview

These sessions included a participatory activity that was used to provide a common language to reference and reflect Tech Data's brand personality.

## Meeting Outcome

The information gleaned from these sessions helped to define the message architecture (voice and tone) for The Hub.

## Who Attended

Stakeholders and End Users

TECH DATA INTRANET DISCOVERY

# MESSAGE ARCHITECTURE: END USER

| Empowering | Relationship Oriented | Visionary | Approachable | Community Building | High-Quality |
|---|---|---|---|---|---|
| Responsible | Practical | Cutting Edge | Current | Global | Custom |
| Professional | Customer Oriented | Bleeding Edge | Trendy | International | Premium |
| Authentic | Responsive | Smart | Hip | National | Elegant |
| Value Oriented | Focused | Innovative | Simple | Diverse | Slick |
| Accessible | Driven | Savvy | Fun | | Tailored |
| Fair | Flexible | Progressive | Cool | | Modern |
| Trusted | Timely | Leading Edge | Informal | | |
| Down to Earth | Proactive | Technological | Welcoming | | |
| Consistent | Assertive | Thought Leader | Casual | | |
| Reliable | Actionable | Strategic | Friendly | | |
| Experienced | Efficient | Tactical | | | |
| In Touch | | Pioneering | | | |

** Current State Company Wide End User Survey*

*Top Ranking Attributes: Customer Oriented, Reactive, Traditional, Value Oriented, Structured, Diverse*

*Bottom Ranking Attributes: Hip, Cool, Authentic, Simple, Empowering, Thought Leader*

TECH DATA INTRANET DISCOVERY

# MESSAGE ARCHITECTURE: STAKEHOLDER

| Progressive | Empowering | Value Oriented | In Touch | Community Building |
|---|---|---|---|---|
| Modern | Responsible | Relationship Oriented | Reliable | Diverse |
| Cool | Proactive | High-Quality | Fair | Global |
| Thought Leader | Actionable | Customer Oriented | Welcoming | International |
| Smart | Focused | Authentic | Accessible | |
| Innovative | Responsive | Detail Oriented | Fun | |
| Technological | Efficient | | Friendly | |
| Pioneering | Driven | | Down To Earth | |
| Savvy | Simple | | Trusted | |
| Cutting Edge | | | Tailored | |
| Current | | | Consistent | |
| Visionary | | | Casual | |
| Strategic | | | Approachable | |

** Current State Company Wide End User Survey*

*Top Ranking Attributes: Customer Oriented, Reactive, Traditional, Value Oriented, Structured, Diverse*

*Bottom Ranking Attributes: Hip, Cool, Authentic, Simple, Empowering, Thought Leader*

TECH DATA INTRANET DISCOVERY

# MESSAGE ARCHITECTURE: THE SWEET SPOT

Relationship Oriented

Empowering

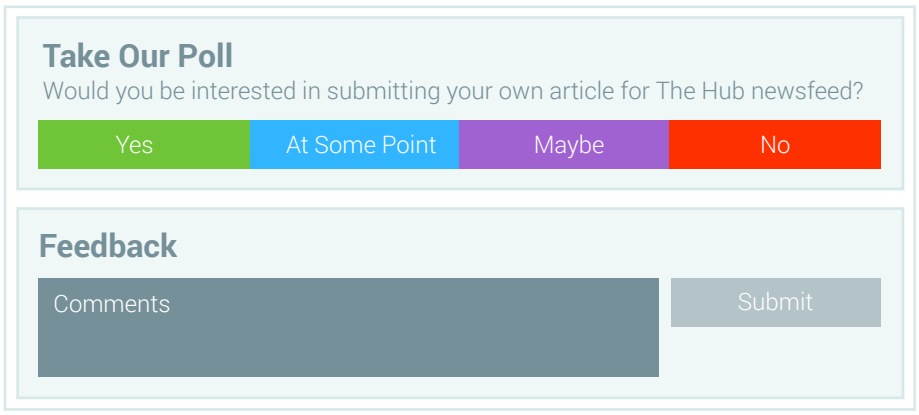
Progressive

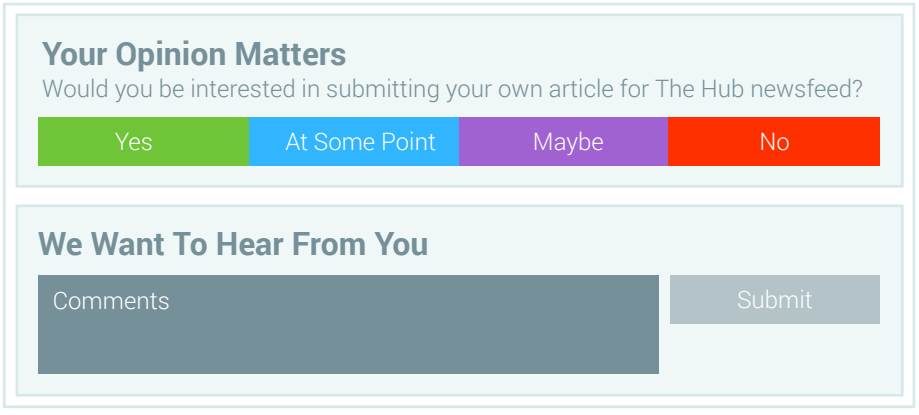
Approachable

Community Building

## The Voice & Tone

The Voice represents Tech Data's brand personality. The Tone is a subset of voice. Tone shades the voice based on the audience and situation/content type. The "sweet spot" attributes listed above will help to provide a common language to reference and reflect Tech Data's internal brand personality. With your final Message Architecture in hand, you will have a useful tool when trying to decide how your content should be portrayed. In the example below, using the attribute "Approachable" we improve the web part titles, providing a softer tone and helping users feel valued.



TECH DATA INTRANET DISCOVERY

# END USER SURVEY

## Survey Interpretation

A survey was used to help us to understand the different types of personalities working at Tech Data and what would appeal most to them; from a functional, messaging, and visual standpoint.  690 employees provided feedback to the survey.  Below are the results and an understanding of what the questions and results represented.

Q1: Would you consider yourself...

Result: 47% of the employees selected Balanced

Interpretation: Most employees have willingness to accept change or something new. This tells us that there won't be a high level of resistance to the change.

Q2: Select the animal you identify with most:

Result: 36% said they identify most with the Dolphin

Interpretation: Dolphins are driven to create a harmonious and aesthetically pleasing environment and are at their best helping others to achieve their goals. The most sensitive and kindhearted of all types, Dolphins are dedicated to making those around them happy, working instinctively to create an ambient tranquil atmosphere of peace and acceptance. Imaginative and creative, they will often be at their happiest mulling over their own thoughts and ideas for significant periods of time.  This data tells us that most employees are less concerned with structure and more concerned about an interface and information architecture that is simplified and easy to use, allowing them to get their job done.

TECH DATA INTRANET DISCOVERY

# END USER SURVEY

Q3: What is your idea of a typical after-work activity?

Result: Over 60% of the end users are Family Oriented, choosing to spend time at home

Interpretation: This tells us that family and a sense of community and purpose is most important to a majority of the employees. They want to feel engaged and have meaningful relationships with their co-workers.

Q4/5: I give up on a small task... & Would you consider yourself cultured?

Results: Almost 90% said they Never give up/Depends on the task and ~80% Liked Switching It Up and are Open to New Things, carefully taking into consideration the terms involved

Interpretation: These results will help us in identify the hierarchal feature plan of action to take whether its personal/relative information before company/global information or vise versa.

Q6: On your first day at work, are you usually...

Result: 46% said Excited

Interpretation:  At least half of employees look forward to the career possibilities offered by a new work environment.  We can expect the same attitude towards the rollout of the new intranet.

TECH DATA INTRANET DISCOVERY

# END USER SURVEY

Q7: Select the top three (3) attributes that describe Tech Data today:

Top Attributes Result: Customer Oriented, Reactive, Traditional, Value Oriented, Structured, Diverse

Bottom Attributes Result: Hip, Cool, Authentic, Simple, Empowering, Thought Leader

Interpretation: It was clear from the end user interviews what employees wanted Tech Data to be. This data was used for extending the outreach of the Message Architecture activity to understand how Tech Data is currently perceived by employees. The results should be taken into consideration when finalizing the Message Architecture and accessing the future state vision.

Q8: In general, how is Tech Data in keeping to deadlines and completing tasks?

Result: 39% agree Tech Data is good at keeping deadlines, although 30% said they wish they had the right tools

Interpretation: These answers help us understand the how soon users would like to see change with the new intranet and their hopes that we can provide them with useful tools with the new roll out.

Q9: Would you consider Tech Data cultured?

Result: 48% said Every now and then they surprise me.

Interpretation: This data gives us a read on the type of culture that exists at Tech Data today, so we can tailor the employee engagement approach through the intranet.

Q9/10: Would you like Tech Data to be more... & Which vehicle would you pick?

Result: 70% selected Modern, Visionary, Engaging, and Empowering and 56% selected Sports/Lux and Utility/Truck

Interpretation: This data helps us gauge the visual direction we should take the user experience of the new intranet. The results tells us that users want a sleek and useful intranet.

TECH DATA INTRANET DISCOVERY

# NEXT STEPS

## 1. Digest

Take the next couple of days to digest the information gathered, discuss, weigh pros and cons of outcomes, and consider the significance and the impact it may have on the intranet redesign.

## 2. Formalize

Make informed decisions on priority of components/apps, desired features, message & persona, and navigation structure (site map) of the new intranet redesign.

## 3. Visualize

With the user experience direction defined, the visual designs will be created, shared, iterated (if applicable), and approved for Phase II development.  The limited mock-up set includes: Global Landing, US Landing, Navigation, Department Landing, Department Sub, Article Landing, Article Page, The Grid Landing, The Grid User Profile, Team Site Landing, Global Search.