Building User-Centric Next-Gen Intranets

2018 KMWorld, Washington DC

Amy Ladas | Jim Lee

FULTON FINANCIAL CORPORATION
What we’ll discuss with you...

- Who is Fulton Financial
- Our team
- Why we’re here
- Where we’re going
- What we’ve learned that you can too
Who is Fulton Financial Corporation?

- A mid-Atlantic financial holding company
- Based in Lancaster, Pennsylvania
- Flagship bank founded in 1882
Where you’ll find us

- ~240 financial centers throughout the Mid-Atlantic
- Asset size of $20.2 billion
- 3,700+ team members (3,580 Full-time employees)
We give back

WE SERVE
Our Bankers serve on non-profit boards in their hometowns, across the regions we serve and at a national level.

WE VOLUNTEER
Every year, our employees volunteer for hundreds of non-profit organizations that help people in our community.

WE CONTRIBUTE
Fulton Financial Corporation and its employees make charitable gifts to hundreds of non-profit, civic and educational organizations.

WE CARE
Currently, Fulton Financial Corporation proudly has 5,400 non-profit organizations as clients.

Serving the community in these ways ensures that we:
- Know the needs of our communities
- Interact with other community leaders
- Help enrich our communities to make them stronger
Our Team

- Holly Frost – SharePoint Architect
- Evan Groff – Knowledge Management Specialist
- Amy Ladas – UX and UI Designer
- Jim Lee – Knowledge Management Director
- Carol Kimball – Change Management Officer (April)
- Suleyman Cevik – Business Services Senior Analyst (July)
- Jeff Talarico – SharePoint Senior Developer (August)
- Mike Donley – Lead Application Developer (September)
- Delia Pabon – IT Applications Process Improvement (September)
- David Schlosser – IT Change Control Analyst (October)
Why are we here?

• We’ve taken an “organic” approach to developing the next great leap in our knowledge management journey

• We have a “make it happen ourselves” attitude

• We have a core group of people with no “legacy” limitations

• We have aspirations of greatness with respect to our colleagues’ digital experience
What is the future of FFC Knowledge Management?
Your goal should be for each page or screen to be self-evident, so that just by looking at it the average user can say “I get it”.

STEVE KRUG
First, the 2018 KMWorld Kazoo Band...

Mary had a little lamb
Little lamb, little lamb
Mary had a little lamb
Its fleece was white as snow.

And everywhere that Mary went
Mary went, Mary went
Everywhere that Mary went
The lamb was sure to go.

He followed her to school one day
School one day, school one day
He followed her to school one day
Which was against the rule.

It made the children laugh and play
Laugh and play, laugh and play
It made the children laugh and play
To see a lamb at school.

Artwork by Leigh Ann,
Song Series Collection,
Moon Bound Girl
What a kazoo can teach us...

• To accomplish great things together, we have to be vulnerable together.

• When you have a vision, lead your team to the vision so you have a chance of making it a reality.

• We should never assume that something is “easy to use.”

• Most people won’t ask for help and will try to figure it out on their own, even when something is frustrating.

• It’s our interaction with our tools that proves whether a design works or not.

• Lower fidelity prototypes are enough to let you know if you’re on the right path or not.

• Getting your users involved sooner rather than later will help them become invested early adopters, and can help your endeavor become contagious.

• It’s ok to be silly sometimes!
Where UX fits...

Framework
HCD / UCD

Methodology
UI UX Experience Design Service Design

Approach
Design Thinking Systems Thinking

CUSTOMER EXPERIENCE
Brand Reputation
Customer Service
Empathy
Value
Sales
Advertising
Marketing
Product Delivery
Operations

USER EXPERIENCE
Information Architecture
Interaction Design
Content Strategy
Empathy
Visual Design
User Research
Usability

SD Service Design
CX Customer Experience
UX User Experience

FULTON FINANCIAL CORPORATION

ARCHITECTURE
INDUSTRIAL DESIGN
SOUND DESIGN
HUMAN-COMPUTER INTERACTION
SERVICE DESIGN
INTERACTION DESIGN
VISUAL DESIGN
TECHNOLOGY PLATFORM INTEGRATION
BUSINESS TRANSFORMATION
INFORMATION ARCHITECTURE
Content (Text, Video, Sound)
A complete picture of UX...

CUBI User Experience Model
by Corey Stern, August 2016, cubiux.com
Growth of our cross-disciplinary team...

- **SEPT. 2017:** KM, UX and SP formed core partnership
- **MAR. 2018:** Partnership with Change Management leads to adding CM to team
- **APRIL - MAY 2018:** Collaboration strategy and attempts at top-down alignment began
- **JUNE - AUG. 2018:** UX and KM lead workshops across key organizational areas
- **AUG. 2018:** Senior BA and SP front-end (both new to FFC) join team
- **SEPT. 2018:** Application Development lead joins team
- **OCT.:** Partnership with Process Improvement Analyst leads to joining team
- **MID-OCT.:** BSM aligns stronger with Application Development team; UX bridges between them, BAs, & business partners
- **Added graphics person w/direct ties to heavily-used enterprise-wide application**
Our team is pioneering experience design with UX methodologies and design thinking approaches...

• Empathizing and story-mapping experiences of our users with internal software, processes, communication, pain points & reality of what they’re trying to do versus what they’re able to do.

• Proactively evaluating internal systems and digital experiences **before they become a problem.**

• Educating people and guiding them to available options instead of making them guess.

• Telling our stories in a simpler way, visualizing options, supporting our users through job aids & easy references to reduce the cognitive load.

• **We’re setting the bar for understanding internal experiences.**
Our team’s largest endeavor together:
Design System
Everyone is excited by the possibilities...

- Application developers immediately using and building systems directly from design system.
- Managers who’d nearly given up expecting things to change are sharing how revitalized they feel.
- BAs seeing huge time & efficiency gain in gathering and documenting requirements.
- Business people benefitting from better communication, solution visualization, faster design & development.
When you actually do generate the excitement you fostered...

How we’re coping and getting stronger...

• Fine-tuning our intake process

• Becoming more realistic about how much we can do

• Asking more than presence from those who want to work with us

• Prioritizing, alignment, and being accountable to our main focus initiatives at the time (and to completing them) before taking on anything more

• Becoming more realistic in what we’ll tackle together -vs- separately
Our second-largest endeavor: Experience Improvements to the Intranet

Shift from current homepage, focused on company-wide communications, to a Next-gen homepage where **3 views live side-by-side** in our SharePoint environment.

1. **Full area devoted to each employee** (role, IT support options, pending/current HR items)
2. Communications/company perspective
3. **Enterprise social network** (work-related groups user belongs to and/or follows, expertise groups, training, education, career-growing --- *i.e.* UX blog --- a true digital workplace.)
Experience Improvements to the Intranet: How we will get there...

• Prioritize & work towards functional improvements we already know cause problems.
• Observe and interview our users, don’t just ask them what they want or need.
• Map out our users’ stories for the user profiles/personas that are our priority focus.
• Using surveys done in Six Sigma fashion, set clear deliverables to measure.
• Use wire-framing, prototyping and early testing with users before building.
• Plan for analytics to track, why, what time frame, and how results will either drive further experience enhancements or further user discovery.
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Thank you!

QUESTIONS?

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B202. Building User-Centric Next-Gen Intranets

After a very successful launch of Fulton’s SharePoint-based intranet (The HUB) in 2016 replacing an aging 1990s era collection of poorly managed web pages, the work to develop the next generation of The HUB is underway with a collaborative approach to ensure a user-centric design. Taking an “under-the-radar” approach to fit into everyone’s schedule to avoid the need to engage the corporate project management prioritization process, the group includes a user experience expert, SharePoint team, change management leader, and the KM team.

Starting by setting design standards, developing user journeys, benchmarking with top intranets, and the customer facing website, the team quickly developed a collaborative working relationship not often found in a traditionally hierarchical, conservative enterprise. During the design period, continuous improvement was a key change management technique to ensure user engagement in the next-gen intranet with full KM capabilities.

Get the strategy and techniques used by the design team, learn from their experience, and take home solid insights.
With 23 years of experience in the visual communication and cognitive design fields, my background started in graphic design and commercial art, shifting and growing into web design and development, then into application and training module development. As an instructor for a technical university for about three years, I became passionate for how others learn and experience digital arts, helping them build their skill-sets and confidence with their peers for real-world practicality of visual communication methods. My experiences shifted through self-service application front-end development, style guide digitization, content management system asset management & training, and UX/UI methodology for a global corporation. Within the last decade, I’ve found all experiences come together with the methodology of user experience and human-centered design, with facilitation of discovery workshops with the business, and UX consultations & workshops with all areas of the corporation enterprise.

Being able to quickly gain alignment through sketches, user story mapping, card-sorting, wire-framing and prototyping, user-testing – whatever creative method proves most useful for understanding and framing the proper challenge – is what brings me satisfaction. Being curious, understanding others’ perceptions, feeling their vibes, and finding ways to engage them to collaborate to a shared goal fills me with energy. Establishing trust bonds with individuals early in the working relationships and experiencing small wins along the way fuels my passion to keep learning and growing.

*There’s so much to learn and experience!*

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Want to learn more?
The following are some of the tools I use & recommend.
As the Senior Vice-President, Knowledge Management Director, Lee is responsible for the strategic vision and implementation of the corporation’s knowledge management capabilities. In this role, he leads a team of knowledge management and information technology specialists developing the premier knowledge sharing environment within the financial services industry. What makes the Fulton Financial Corporation vision of knowledge management different and more actionable than most KM programs is the focus on process improvement, an area in which Lee’s four decades of work in quality, process, and project management are being leveraged to ensure connectivity to and value for the business objective of high quality customer experience.

His career has spanned the manufacturing, retail, and professional services industries, and now financial services as well. Prior to joining Fulton Financial Corporation, at APQC Jim’s clients included large, global organizations seeking to develop their enterprise KM strategies, KM measurement, and transfer of knowledge, with clients including global pharmaceutical firms, oil and gas companies, the government of Singapore, and the agency responsible for the rail transportation infrastructure in the United Kingdom. He also led a team that developed the enterprise KM strategy for a command of the U.S. Army and provided KM strategy guidance and training for a command of the U.S. Navy.

Before joining APQC, Jim was a global knowledge manager at Cap Gemini Ernst & Young as well as a senior member of the Ernst & Young Center for Business Knowledge, where he led the development of an integrated knowledge management system after the merger of two global management consulting firms. This work included the development of the knowledge management strategy, evaluation of the IT infrastructure, process development, and training for the 55,000 employees of the combined global professional services firm. Jim’s career began at General Motors, where he spent two decades in operations, industrial engineering, manufacturing engineering, quality management, and business strategy development. He later worked for the world's largest specialty retail jeweler, conducting quality and process improvement projects in all aspects of operations.

Jim holds a Master of Business Administration degree from Cleveland State University and a bachelor’s degree in industrial administration from General Motors Institute. As an adjunct professor Jim has taught graduate courses in project management, operations management, quality management, and statistics. He is a frequent speaker at national and international conferences on project management and knowledge management, including frequent presentations at KMWorld.

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