

IT Web Site Interview Findings

- » **About the project**
- » Findings
- » Personas
- » Recommendations
- » Next Steps

About the project

» **Project Goal**

IT is planning to create a web site to be a source for answers to the various questions that its employees and clients face every day.

» **Research by Interviewing**

As a first step in planning the site's content and organization, we conducted a series of interviews with representative end-users. Interviews gave us the opportunity to hear people explain in their own words what information they need to know about the IT organization and how it works.

» **Who We Interviewed**

- » 20 IT employees in total
- » 13 managers / 7 non-managers
- » 12 employees from the SF office / 8 employees from regional offices
- » 12 old timers / 8 new joiners
- » 14 principals & MDs / 6 associates

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Findings: a majority of people would like to see...

- » Group Overviews / What Each Group Does
- » Big 5 Projects
- » Business-Level Metrics (e.g., Spend Year-by-Year, ROI)
- » Training (Personal Development / Educational Allowance Forms)
- » What software is available & how to acquire
- » Project Pipeline / Repository of Initiatives
- » F2F Presentations
- » User Administration / How to get a New Account Setup & Access Eat / ShareIt / Etc.
- » Collaboration Tools (IMM, discussion lists, how to use IQ)
- » How to write and submit a WID / How to engage IT
- » Executive Blogs
- » Career Development Framework

Findings: in addition, certain types of people want to see..

Managers / Principals:

- » SOX & Compliance
- » Purchasing / How to Get Spend Approved
- » Success Stories
- » How IT is Governed
- » Lifecycle of Our Data

People in Regional Offices:

- » Who Owns What
- » Leadership Bios
- » IT HR
- » Market News
- » Technologies We Use

New Joiners:

- » Calendars
- » How to Get Help
- » Production Contacts
- » IT for IT Training
- » How to Report Time
- » Holiday Requests Form

Findings: thoughts on the IT Brand

- » People in IT want the rest of BGI to see us as:
Efficient. Innovative. Cutting edge. Knowledgeable about technology AND business.
Forward-thinking. Responsive. Trustworthy. Proactive. Partners.
- » But they worry that we are currently hampered by a perception that we are:
Confusing. Disorganized. Opaque. Inflexible. Not global minded.
- » People agreed that the web site could help to counter those negative perceptions, but that it will be important to provide **transparency without being overwhelming.**

Findings: what the results mean

Core Themes Equal Content

- » These themes expose how people think about IT-related information, and suggest high-level categories for the web site:
 - What we're doing as an organization (big 5, executive blog)
 - What we're comprised of (groups that make up our organization)
 - Day-to-day stuff like how to get software, how to get a user account, how to get into eat, shareit, etc.
 - A place to go back and find communications (F2F)
 - How to engage with IT (WIDs)

Some Variations Among Different Types of Users

- » Although users strongly agreed on main themes, certain types of users seek additional information that is relevant to their concerns.
- » This reminds us that we have different types of people with different types of needs visiting the site.
- » To ensure that we meet their needs, we need to **get to know them better...**

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Personas

- » Personas are **archetypical users** to illustrate who will use the site and how.
- » Personas also address the question of **what will drive users** there and what will keep them coming back.
- » Well crafted personas are a way to ensure that we are clear about **what the site must accomplish** in order to be successful...

Personas: meet the users



Eugene

He has been with BGI for 4 years. He manages a global team of 25 people, although he is based in the SF office.



Lynn

She has been with BGI in the Sydney office for 11 years. She has held a number of different positions and consequently has a lot of institutional knowledge.



Josh

He is a new joiner and a developer in the SF office. He's still learning the ropes.

Personas: Eugene



» **About Eugene**

- » He spends a lot of time talking to people about projects – status, feasibility of new ventures, etc. He also spends a lot of time connecting with peers at his level.
- » His group is growing quickly. They've put a lot of effort into creating a wiki for their group, which is meant to help his employees collaborate and to get new joiners up and running quickly. He likes the wiki, but he wouldn't want to use it to share information about his group with its clients – for that, he'd want a more focused and clear message.
- » He constantly struggles with how to help his employees understand better how their work fits into larger strategic efforts.

» **How the Site Can Help Him**

- » Provide quality material on high-level IT strategy and how it supports business strategy to point employees to.
- » Provide consistent, solid onboarding material for his group to supplement with group-specific info stored in their wiki.

» **What Will Bring Him Back**

- » He wants to find good material about IT strategy and BGI business and share it with his employees. (But he doesn't have time to go digging around.)
- » When new senior leaders join, he wants to read their bios, see their photos, etc., so he knows who to introduce himself too at the IT mixer.
- » He wants quick links to forms for requisitions, contractor hires, etc. He doesn't have enough time for this stuff, so he wants to get the material quickly!

Personas: Lynn



» About Lynn

- » Lynn's official title is project manager, but she gets involved in all sorts of projects in a variety of capacities since she has so much institutional knowledge –having worked in a several different groups since joining BGI.
- » She knows a lot about policies and governance, and people often come to her as a starting point when they're trying to find info.
- » Working in a regional office, she works aggressively to stay informed about global IT initiatives, what projects are going on, and what's happening in the industry at large.

» How the Site Can Help Her

- » Provide insight into big global projects.
- » Be a place to refer people when they have questions about policies that she used to work on two job titles ago. Cut down on “who should I talk to about...” phone calls.
- » Be a resource to keep track of what's going on in the industry (e.g., whitepapers, Forrester reports, etc.).

» What Will Bring Her Back

- » White papers. Forrester reports.
- » Regular updates on big projects.
- » Derek's CTO updates (and other types of executive communications).

Personas: Josh



» **About Josh**

- » New to BGI, so far Josh has relied a lot on the other people in his group for information about how things work in IT. Even so, he's frequently encountering new things he's never heard of before (DBSSI, GCMForm, etc.)
- » He's not really clear how his group fits into IT as a whole.

» **How the Site Can Help Him**

- » Give him an overview of all the groups that comprise IT and point to contacts in IT. Make it easy to get all of this in one holistic view (so he feels confident that he's getting the big picture, and not missing anything).
- » Make it easy to understand the basics: time tracking, what the rules are around training, etc.
- » Help him understand the tools that are in place for him to do his work (What technologies are at his disposal? What IDEs can he use? What are BGI architectural standards? What products does ReUse provide?)

» **What Will Bring Him Back**

- » Links to information about technologies we use, things on offer from ReUse, etc.
- » Info about how to request time off, training, etc.
- » Background and perhaps a contact when he has to interface with a new group.

Personas: what they tell us

- » The site should contain a **blend** of **high-level strategic** material and **practical links** to forms, policies, etc.
- » Different types of users may have very different objectives, so it will be important to give all visitors an **easy-to-digest view of available material** and let them drill down from there.
- » For some users, a key value of this site will be its ability to deflect calls and questions from coming their way. Such users will need **an easy way to provide feedback / recommendations** on the resources that are shown. Exactly how this is done is an open issue to be addressed in next steps.

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Recommendations

- » **Content**

Content can be divided into groups of information that correspond closely to the core themes that a majority of people cited.

- » **Home Page**

The home page should show a skeleton of all available material and make it easy for a user to figure out the full scope of material in the site.

- » **Sub Pages**

Sub pages should follow a consistent template and be easy to peruse quickly. Like the home page, they should help the user quickly master the full scope of available information.

- » **Editorial Schedule**

The plan for the web site should include a plan for how to get people to return to the web site.

Recommendations: content

What You Need to Know

- » For managers
- » For new joiner
- » For customers of IT
- » For everyone

The Business of IT

- » Leadership
- » Governance
- » Financials
- » ROI
- » Strategy
- » Industry Information

Groups

- » Architecture
- » Client and Support Technology (CAST)
- » DBAs
- » Fixed Income IT
- » GUA
- » iProducts IT
- » Knowledge Management (KM)
- » Operations
- » Messaging
- » ReUse
- » Strategic Project Office (SPO)
- » Unix

[Etc. List is not complete. How granular should the list of groups be?]

Communications

- » CTO Updates
- » F2F Archives
- » Announcements

[Additional sections may be added here over time.]

Key Projects

- » [Project 1]
- » [Project 2]
- » [Project 3]
- » [Project 4]
- » [Project 5]
- » [Project 6]

Tools We Use

- » IQ
- » IMM
- » ShareIt
- » Eat
- » GCMForm
- » DBSSI
- » Software
- » IDEs
- » Languages
- » Platforms

Working With IT

- » How to Submit a WID
- » How to Get Technical Help

Working in IT

- » Time Tracking
- » Training
- » Vacation
- » Managing Your Career
 - » Career Development Framework
 - » Functional Promotions
 - » Principal Promotions
 - » How Compensation is Determined
- » Transferring
- » Travel
- » Risk & Audit
- » Hiring
- » New Employees
- » Contractors
- » Purchasing
- » Open Positions

Recommendations: home page

- » A **classic portal style home page** facilitates quick scanning so people can easily identify the range of information available in the site.
- » **Recent announcements** are highlighted in the IT news section.
- » **Top resources by user type** are called out under What You Need to Know—providing quick access to the most important links.
- » Note that this is **merely a high-level design**. Detailed screen layout and visual design should be completed in the next phase of the project.

Inside IT | BGI Information Pipe line

[About bip](#) | [Calendar](#) | [My bip](#) | [Login](#)

[HOME](#) | [ABOUT BGI](#) | [IQ](#) | [DIRECTORY](#) | [SITES](#) | [HELPME](#) | [SEARCH & ARCHIVES](#)

Inside IT

IT News

1/15/2008 [Q1 CTO Update...](#)
12/15/2007 [Announcement regarding functional promotion process....](#)

What You Need to Know

[For new joiners to IT](#)
[For managers in IT](#)
[For customers of IT](#)
[For everyone](#)

The Business of IT

[Leadership](#)
[Governance](#)
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[ROI](#)

Key Projects

[\[Project 1\]](#)
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Working in IT

[Time Tracking](#)
[Training](#)
[Vacation](#)
[Managing Your Career](#)
[Career Development Framework](#)
[Functional Promotions](#)
[Principal Promotions](#)
[How Compensation is Determined](#)
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Groups

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[Client and Support Technology \(CAST\)](#)
[DBAs](#)
[Fixed Income IT](#)
[GUA](#)
[iProducts.IT](#)
[Knowledge Management \(KM\)](#)
[Operations](#)
[Messaging](#)
[ReUse](#)
[Strategic Project Office \(SPO\)](#)
[Unix](#)
[Etc...](#)

Tools We Use

[IQ](#)
[IMM](#)
[ShareIt](#)
[Eat](#)
[GCMForm](#)
[DBSSI](#)
[Software](#)
[Buy/Hold/Sell List](#)
[How to Acquire](#)
[Packaging](#)
[IDEs](#)
[Languages](#)
[Platforms](#)

Communications

[CTO Updates](#)
[F2F Archives](#)
[Announcements](#)

Last Updated 1/15/2008

For questions or suggestions call SFO x1234 or email insidet@barclaysglobal.com

Recommendations: sub pages

- » There is a **single page** for **each high-level group** of information. All the items in that group are listed on the same, easily browsed page.
- » Left hand **anchor links** help users jump easily to a particular point in the page. Sections can be collapsed or expanded.
- » For each section on a sub page, there is a **short description**, a phone number for **who to contact** to get more information, and a **list of related links**. The links are the real heart of the system, and what make it an effective portal.

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Inside IT

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[Groups](#)

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[Working in IT](#)
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[IT A to Z](#)

Groups

- ▼ **Architecture**
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque placerat. Maecenas lorem dui, pharetra vitae, viverra vitae, venenatis ac, urna. Suspendisse non libero rutrum nulla mattis lobortis. Sed at dui. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas.
For more information call John Doe at x1234
- ▼ **CAST**
Maecenas lectus. Morbi aliquet volutpat nisi. Morbi lobortis tellus in nulla. In hac habitasse platea dictumst. Nunc blandit lectus. Fusce vehicula nibh vitae elit. In erat. Phasellus dignissim vulputate elit. Donec ultrices, erat aliquet aliquam rhoncus, elit dui commodo augue, et iaculis odio leo ut pede. Sed ut neque et dui pulvinar rhoncus. Maecenas in nisi quis eros ornare dignissim. Nulla vestibulum lacus vel nisi.
For more information call Jane Smith at x2345
- ▶ **DBAs**
- GUA**
Vestibulum est. Proin rutrum, sapien non tincidunt lobortis, erat nulla faucibus risus, non aliquet neque eros eget nunc. Duis ullamcorper viverra eros. Proin hendrerit arcu vel diam.
For more information call Sam Thompson at x3456

Architecture Links
[Innovation Wiki](#)
[Architecture FAQs](#)

CAST Links
[Log a Ticket for a Web Site](#)

GUA Links
[ART](#)
[User Account FAQ](#)

Recommendations: editorial schedule

- » **Regular communications** should draw people back into the web site.
- » This could include **Derek's CTO update**. Announcements about recent updates, Etc.
- » It's a good idea to **plan** what types of communications will link back to the site and on what **schedule**. The personas are a useful tool in this. Think about what would interest the different types of users.

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Next steps

- » Approve high-level direction (S Williams)
- » Resolve technical questions (J Coleman / L Buley)
- » Develop content inventory (T Nguyen?)
- » Complete page designs & determine IT brand look & feel (M Gantt?)
- » Build site (M Gantt?)