

# Helping HSBC make its employees more effective and more informed

Simon Rubens, new experience limited

## Background

HSBC Bank had developed its UK intranet as the place for its 55,000 employees to check procedures, access tools and learn about news and events relevant to their job. Migrating the information from print to electronic form brought significant cost advantages but staff now found it harder to find procedural information and keep up to date with bank news.

HSBC commissioned HeathWallace a leading financial services web design firm to re-architect and redesign the top level of the intranet. Our role was to work with HeathWallace to inform the redesign by understanding how HSBC employees use and consume information in their daily working lives – and how they use the intranet within this.



The old intranet home page

## Research approach

We conducted research in branches, a call centre and the bank's head office. First we got participants to log their use of the intranet over several days. Then we conducted desk-side interviews, site tours and observations, and tested some benchmark tasks.

While on site we could observe how employees used the intranet alongside a range of different communication channels and tools. These included LED displays that communicate urgent information, whiteboards that provide a public forum for staff to commit to weekly sales pledges, and branch meetings that enable sharing of key news and information.

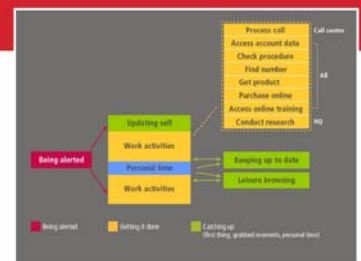


Different channels of communication in the bank

## Findings and model

Analysis revealed that staff use and consume information in three modes: 'Getting it done', 'Being alerted', and 'Catching up'.

Most time is spent in 'Getting it done' mode as staff find and use information to perform core tasks. 'Being alerted' is a passive mode in which staff are made aware of important but infrequent events such as an interest rate change or an ATM network failure. Staff engage in 'Catching up' mode at the start of the day and in grabbed moments – to update themselves on procedural changes, keep up to date with bank news or take a micro break to look at social news or items for sale. The design of the intranet did not reflect these modes or the possibility that users may need to flip rapidly between them.



Model of user modes and activities

## Implications and redesign

Identifying the modes and how users wished to switch between them was fundamental to the redesign. The model provided a framework for re-architecting the site.

The research findings highlighted big differences in work and communication practices. Call centre staff work in relative isolation and rely almost exclusively on the intranet while branches are a more social environment where most communication is person to person, and one person sometimes takes it upon themselves to act as mediator between the intranet and other staff. This understanding was valuable in shaping the bank's expectations and strategy for the intranet as a key communications tool – within a rich and varied communications environment.



The new intranet home page