

Helping HSBC make its employees more effective and more informed

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. Our role was to help overcome these problems by understanding how HSBC employees use and consume information in their daily working lives – and how they use the intranet within this.

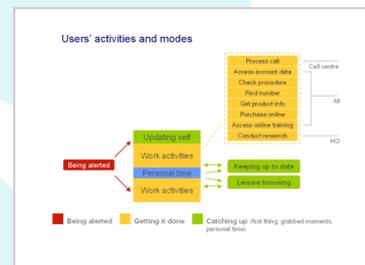
In-context ethnographic research and usability testing



To understand and address usability issues we first needed to understand the broader context of how employees used the intranet – and other channels of communication. We conducted research in branches, a call centre and head office using videoed interviews, observation and self-reporting techniques to explore real experiences and capture and shadow routine tasks and activities.

A model for understanding and improving user experience

Through our analysis of research data we identified that employees use the intranet in three very different modes and their goals and needs differ according to the mode they are in. We visualised these modes and associated activities to create a model – or ‘map’ – for understanding and improving user experience. The map, supplemented by illustrative video clips, provided a clear frame of reference for HSBC and the design team to rethink the high-level site architecture.



Using the model to rethink design and information architecture

Information and access requirements by mode	Information	Access requirements
Being alerted	<ul style="list-style-type: none"> Urgent information like rate changes and CRM issues Reminders of important but less urgent requirements and of recent procedural changes 	<ul style="list-style-type: none"> Search, high visibility to ensure awareness
Getting it done	<ul style="list-style-type: none"> Key operations How to do the job (e.g. BuySmart, Group Finance) Product and procedure Customer messaging and advice like online banking 	<ul style="list-style-type: none"> Quick and easy access to key information and when needed, detailed capabilities content High level visibility of content To create and manage content through and across systems, including integrated processes and external data sources Integrated processes and external data sources
Catching up	<ul style="list-style-type: none"> Changes to procedures, content Bank news, speeches, management messages, market news Site infrastructure announcements Personal and organisational performance People news Thought leadership, career opportunities 	<ul style="list-style-type: none"> Support for use of all catching up mode, news and information Easy access and the speed of access to key product information People based capabilities and other news to be used in working time and outside work

Recognising modes, and how users switch between them, was fundamental to the redesign. For example we found that during mini pockets of downtime, such as waiting for a call to be answered, staff switch into a ‘time-out’ mode where they may browse the intranet to catch up on bank news. These mini-breaks are therapeutic and a good use of otherwise-unproductive time. The new information architecture, and a design that provides information in convenient chunks, better support this behaviour.

What HSBC had to say about our research and approach

“This was the first time we had applied an ethnographic approach to intranet usability. We gained deeper and richer insights this way. The model that emerged from the research was simple, clear and intuitively right. It was invaluable for building consensus within and between project stakeholders and the design team. Not only were we able to make the intranet more useful and usable, we now have a tool to support ongoing development of our intranet.” *Mark Bickerdike, UK Intranet Manager, HSBC Bank plc*