

Building a Unified Portal Strategy



An Introduction to
the Unified Portal
Framework and
Building a Unified
Portal Strategy

The UPF, *Unified Portal Framework*, was created to connect digital experiences throughout the organization by leveraging employee experience platforms from a single point of entry.



Understanding the Unified Portal Framework



A unified workplace where tech-based solutions and tools allow employees to be productive, creative and engaged at any time and in any place.

The 3 Tenants of a Unified Portal Framework

Common Vision

A single, **common vision** ensures all employees can quickly and effectively align daily work to fit the needs of the organization. A common vision ensures enterprise-wide alignment.

Best Practices

A **best practice** is a method or technique that has been generally accepted as superior to any alternatives because it produces results that are greater to those achieved by other means.

Taxonomy

The UPF **taxonomy** covers all types of physical and conceptual entities at all levels of granularity and ensure all employees can effectively communicate across the organization.

An Effective Unified Portal Strategy is Critical

Our strategy must include an intuitive and inspiring starting point and all destinations must be easily navigable to relevant, productive solutions that improve the employee's workday experience both as an individual contributor and as a collaborative team.



A Strategy Designed for Success

The strategy that propels the UPF platform forward is mission critical to ensure sustainability, growth and user acceptability. Creating a Unified Portal Strategy (UPS) based on this Framework. The UPS must approach work with a wide set of stakeholders from across the entire organization. This requires extensive workshops and interviewing many levels of the workforce to ensure a broad level of need is met.

A Successful Strategy Will Determine:

- The vision of where we need to be
- High-level roadmap
- The benefits of an effective UPS
- What employees can expect to see
- A target timeline

The Importance of Keeping Focus

Key Focus Areas

- Search
- Navigability
- Findability
- AI/ML
- Starting Point
- Branding
- Governance
- Single Sign-On
- Engagement
- Communication



Focus is Key to Success

With so many different applications available and so many competing needs, the UPS will require structure, roles, policies, processes, rules, and guidelines to establish order and to set direction and alignment.

Without these guidelines, efforts are at risk of becoming misguided or diverted by competing projects

Two essential components of our strategy are the vision and the roadmap. A vision of what the UPS might look like and how it will benefit our employees should inspire the support of the required stakeholders.

The input can also help derive a high-level roadmap of how we're going to achieve our goals.

Defining the Unified Portal Strategy

Effective Search Experience

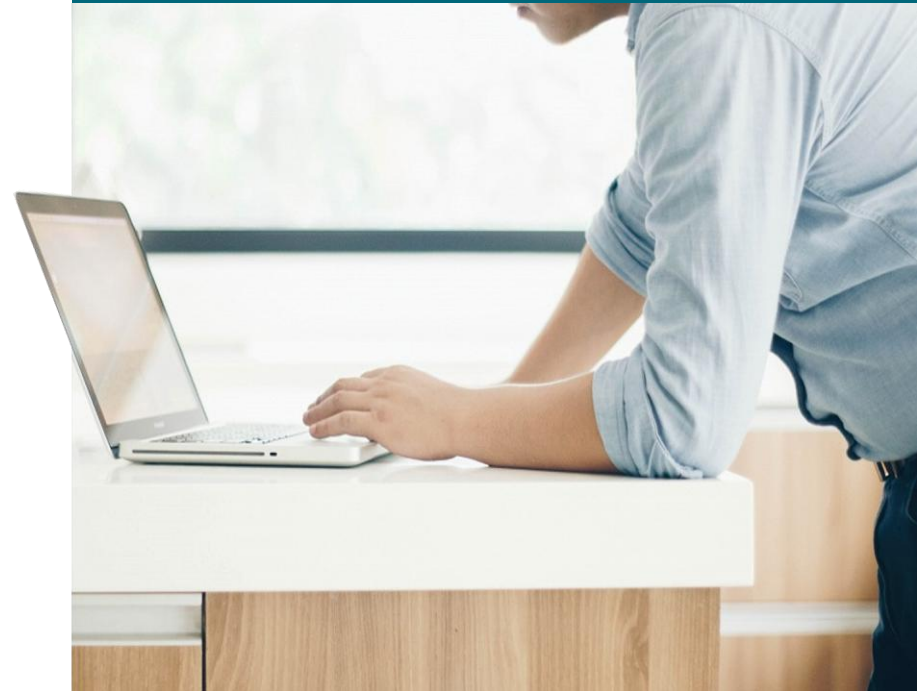
The enterprise search solution is designed to encompass search inside the applications used every day *and* across the Internet.

By applying artificial intelligence (AI) insight and providing a centrally located search box across all our applications, we'll dramatically improve our employee's ability to make informed decisions that have an immediate impact on daily tasks.

Enterprise Search:

- Improves personal efficiencies
- Finds more relevant results quicker
- Learns as it is used to provide a customized experience
- Is consistent across applications and platforms
- Reduces the need to depend on co-workers for answers to well documented questions within and across the organization

Improve search relevance and streamline efforts by ensuring data is easy to find— *and even easier to navigate*— throughout the entire organization.



The Importance of Effective Navigability

The navigability refers to the degree to which a message provides the recipient with cues to be able to make informed decisions about behavior.



The enterprise search feature is paramount for improving productivity and efficiencies, but once an employee has filtered results, they must be able to quickly navigate to the requested information.

Too many times employees abandon direction because of ineffective navigability. Navigation is truly as important as search and plays an integral part in completing tasks.

Effective Navigation Strategies:

- Embrace predictability
- Keep it simple
- Don't overdo minimalism
- Keep it consistent across applications
- Provide clear hierarchical structure
- Divide categories clearly

Findability in the Workplace

Architecture is key to how we help employees navigate their way around the company's culture, processes, tools, and information.

To ensure we're on the right track, keep the following in mind:

- Use tools beyond global navigation, including homepage widgets, favorites, and sub-navigation to help employees find what they need.
- Link directly to different applications and systems when necessary.
- Use intuitive and straightforward language.
- Encourage employees to use personalized *quick links* to bookmark the solutions and apps they use every day.
- Use approaches like card sorting to ensure an employee's navigation matches the way the employee thinks.

Findability is the ease with which information contained on a portal can be found, both from outside the portal leveraging a search engine and by users currently using the portal.



The Impact of Branding for Employees

An effective employee branding strategy will shape an employee's behavior in ways that improve the way they project the brand identity of their organization's products through their everyday work behavior.



Branding starts from the inside. Employees must embrace everything about the brand: its positioning, its values and its purpose.

Consistent and Aligned Branding :

- Encourages employees to embrace values
- Ensures a consistent customer experience
- Improves contribution to the brand promise
- Creates a roadmap directing employees toward same goals
- Inspires employees to live the corporate culture

Positive internal brand identity improves our most influential dimension: a consistent, unified employee-client focus.

Internal branding initiatives create positive identity, fostering positive employee attitudes and actions that go beyond job responsibilities.

Defining the Starting Point

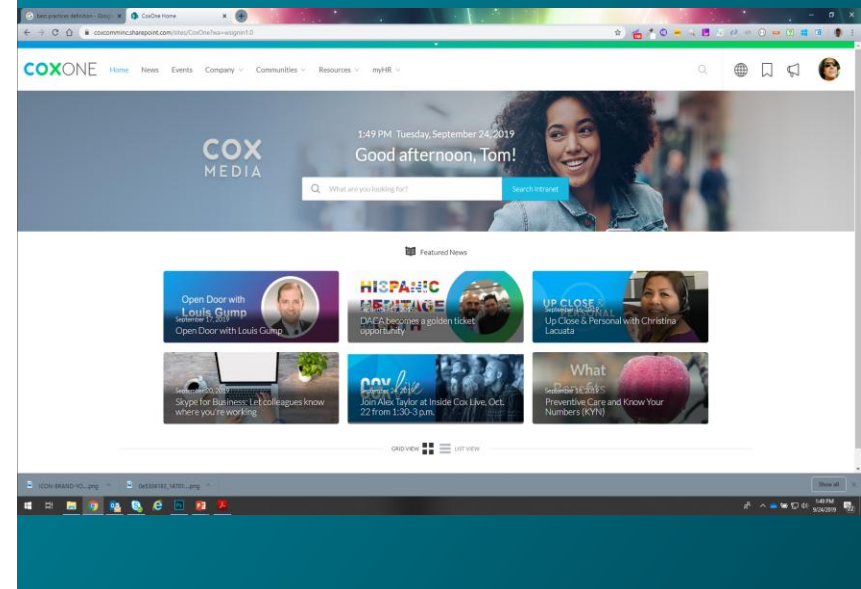
The best kind of digital workplace experience is the one where employees don't have to leave digital destinations at all, the leading trend is to leverage the Intranet as the destination for that experience.

An organization's Intranet is already an employee *go-to* destination, and award-winning Intranets, like CoxOne, are designed to fast track gains from digital transformation initiatives and optimize employee engagement.

Users often leave Web pages in 10–20 seconds, but pages with a clear value proposition hold attention

Integrating "*hub*" locations such as Microsoft Teams and LOB (Line of Business) Applications are key to meeting the user where they work. From self-service, on-boarding and training to success stories and employee achievements, the starting point is *the* place where employees start their day.

A single destination where employees start their day and return frequently to complete tasks. A workplace where tech-based solutions and tools allow employees to be productive, creative, and engaged at any time and in any place.



Leveraging AI and ML

Artificial intelligence (AI) is the simulation of human intelligence processes by machines, especially computer systems. Machine Learning (ML) is a method of training algorithms such that they can learn how to make decisions.



AI handles mundane and repetitive tasks across the organization, freeing up employees to exercise creativity, solve complex problems, and otherwise focus on completing tasks that result in a major impact across the enterprise.

AI allows modern knowledge workers to focus on the most engaging parts of their jobs, while making the company more productive and effective

Artificial Intelligence imitates human thought and action by analyzing data and surroundings, solving or anticipating problems and learning *or self-teaching* to adapt to a variety of tasks.

Through machine learning, employees are able to improve productivity and streamline daily tasks.

Engaging Our Employees

Companies with highly engaged workforces outperform their peers by as much as 147%

Employee engagement is a state of functioning in an organization in which employees are motivated to contribute to the company's success. Employee engagement is generally grouped into 3 categories:

- 1. Engaged collaborators.** They are very enthusiastic about their situation and their employer. They consistently give their best and make significant efforts.
- 2. Non-engaged collaborators.** They show poor emotional allegiance. They contribute to the company, but at a minimum level.
- 3. Disengaged collaborators.** They are not at all invested in their work. Sometimes, they even actively work against their company. This set shows a much higher rate of absenteeism.

Employee engagement strategies have been proven to reduce staff turnover, improve productivity and efficiency, retain customers at a higher rate, and make more profits. Moreover, engaged employees are happier, both at work and in their personal lives.



The Focus on Communication

Corporate communication is a set of activities involved in managing and orchestrating all internal and external **communications** aimed at creating a favorable point of view among stakeholders on which the company depends.



The intent is to **protect** the organization's branding. Corporate communication isn't just how employees communicate with one another; it's how employees *live* the company's brand.

It also involves the communication between the company and customers. The importance of user adoption is significant and affects the company's success.

Tips for announcing new features and functionality:

- Enable internal teams.
- Have help articles already available.
- Gather testimonials from beta testers.

[How to communicate product changes to your users](#)

The Impact of Single Sign-On

When employees use technology, they should be able to **work seamlessly across applications** and **intuitively without barriers**.

The full unified portal experience should be accessible through a single sign-on process.

Once an employee authenticates into the network, they should be able to maneuver freely and confidently through the entire digital workplace without interruptions to the natural flow of work.

Interruptions account for a high level of inefficiencies and lost productivity

All of which can be virtually eliminated with a true and complete SSO policy that allows all employees to access vital information regardless of location.

Single sign-on (SSO) is a system that enables users to securely authenticate with multiple applications and websites by logging in only once— *with just one set of user credentials*.



Enterprise Governance

Enterprise governance is the set of responsibilities and practices exercised by the board and executive management with the goal of providing strategic direction, ensuring that objectives are achieved, risks are managed appropriately and verifying resources are used responsibly.



The 10 Principles of Governance:

1. Identify an inclusive team.
2. Start with "framing" decisions.
3. Determine your deployment model.
4. Define a clear vision.
5. Identify roles and responsibilities.
6. Develop guiding principles.
7. Decide your organizational comfort level with social computing.
8. Define policies and standards.
9. Document the plan.
10. Socialize and promote.

[The ten principles of governance](#)



About this Presentation

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Tom provides strategy and direction for Digital Experiences. Leveraging Human Centered Design (HCD), he leads UX and UI design for corporate web and print solutions. Tom works in Corporate Services, bringing over 27 years of experience working with some of the nation's largest organizations. Services include:

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- Custom design & development
- Presentations
- Poster, Flyer and Logo design
- LUMA facilitation



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