DIGITAL WORKPLACE CASE STUDY:

Enterprise collaboration strategy
CASE STUDY:

Using data to define an enterprise collaboration strategy

How DWG helped a global financial services company use data and expert insights to develop a collaboration strategy

THE BUSINESS CHALLENGE

Gathering expert insights and data to inform your collaboration strategy

Post-2008, when many in the financial services sector experienced a period of turbulence, the client embarked on various digital workplace initiatives with the aim of building a stable and effective work environment for its people.

With their digital workplace agenda poised to expand and gain speed, the Collaboration team wanted to take time to pause. What were the lessons they needed to take forward with them? The team wanted to look inwardly, to know how well their current collaboration platform and approach were performing. But they also wanted to turn an eye to the outside world; to bring in external insights that illustrated how others were tackling the question of building a human-centred, collaborative digital workplace.

Questions the client needed help with answering were:

- What was good about their current collaboration platform?
- What could be improved?
- What were other organizations doing to drive forward their own digital workplace agendas?
Overview of DWG

The Digital Workplace Group (DWG) provides large organizations with independent expertise for success with intranets and broader digital workplaces.

Our Member Forum offers confidential peer learning and expert research. Our Benchmarking provides sophisticated evaluations, comparisons and recommendations. Our Consulting Services provide strategic guidance and hands-on implementation support.

WHY DWG?

Data, neutrality, practitioner expertise & partnership

The client needed a practical, data-driven assessment of its current approach, combined with strong thought leadership, to demonstrate the art of the possible.

There were three strong drivers that led the client’s Collaboration team to come to us to help them:

- First, it was very important to have an independent evaluation of their platform, with no agenda from the evaluators. A vendor-neutral, objective approach was therefore essential, and one that sits firmly at the heart of our core principles.

- Secondly, our first book “The Digital Workplace: How technology is liberating work” had resonated deeply with the team. This demonstrated our position as leaders in the digital workplace field, beyond just intranets.

- Lastly, the client’s intranet team has been a member of the DWG Member Forum, giving them access to benefits such as peer learning and data-driven benchmarking of their platform.

The Collaboration team therefore knew that we had extensive experience within the areas in which they needed help, and that we backed that experience up with delivery of high-quality results.
The DWG team

Usability Evaluation: The DWG team was comprised of Louise Kennedy (Lead Consultant), Louise Bloom (Second Evaluator) and Andrew Marr (User Survey).

Collaboration Evaluation: The DWG team was comprised of Chris Tubb (Lead Consultant) and Andrew Marr (Second Evaluator).

Innovation Lab: The workshop was facilitated by Paul Miller (CEO and Founder), Elizabeth Marsh (Director of Research) and Julie Lakha (Managing Director of Consulting Services).

OUR APPROACH

In-depth evaluation and innovation insights

We advised the client that a strong, three-pronged approach would best address their needs.

The first two areas harnessed our speciality evaluations in order to assess how their collaboration platform was performing from both a usability perspective and in terms of good collaboration practice. These two assessments, which were carried out independently of each other, provided the client’s team with concrete data and recommendations on where they were performing well, as well as what could be done to take their approach and technology to the next level.

While the independent evaluations focused on practical insights into their current approach, we also facilitated a one-day “Innovation Lab” to pull in more strategic thinking. Drawing on our community, we identified participants from six different household-name organizations (including four from the financial services sector), who would join the workshop to share their own digital workplace journeys. The agenda was also designed to prompt discussion around three key challenges that the client was facing, all related to building an effective, human-centred digital workplace.

(continued on page 5)
### OUR APPROACH (continued)

<table>
<thead>
<tr>
<th>SERVICE</th>
<th>WHAT WE DID</th>
</tr>
</thead>
</table>
| **Speciality Evaluation: Usability** | We assessed the overall usability of the client’s collaboration service, as experienced from a user perspective. The evaluation included:  
  - an expert review, based on observed best practice and user interface design guidelines  
  - user testing sessions, based on a set of agreed usability tasks  
  - a user survey, seeking wider feedback on the intranet.  
  The results were collated and analysed by our evaluators, before being presented back in both a written document and a report-back meeting. |
| **Speciality Evaluation: Collaboration** | Our team evaluated the effectiveness of the client’s strategic approach to collaboration. The evaluation consisted of:  
  - an orientation meeting between our consultants and the client’s team  
  - stakeholder perspective interviews, to understand alignment and priorities  
  - analysis of key strategic documents  
  - platform observation.  
  As with the usability evaluation, our consultants collated their findings and recommendations in a report, which was also presented back to the client’s team. |
| **Innovation Lab** | Working with the client, we shaped an agenda to deliver our specialized Innovation Lab service. This highly interactive workshop focused on discussion of participants’ digital workplace journeys, featuring live tours, and brainstorming about three specific challenges that had been agreed with the client. We identified a number of big names to join us and to contribute their own experiences.  
  On the day, we facilitated the workshop, while also providing relevant research to back up the challenges and opportunities being discussed. |

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5
THE RESULTS AND OUR IMPACT

Lessons from independent data and knowledge sharing

The client came out of the project with a wealth of information and insights about precisely how well their collaboration platform was performing from usability and business perspectives, together with recommendations on how it could be improved. In addition, the Innovation Lab helped open their eyes in terms of the commonality of their challenges, and how other organizations were going about addressing similar challenges.

The impact included:

- **Objective and clear scoring**: Both independent evaluations provided an overall score, as well as a breakdown of how they scored within specific areas, demonstrating precisely how well the client performed against both usability and collaboration good practice.

- **Identifying strengths and weaknesses**: The client’s team was able to see where their approach and platform were performing well, providing a clear list of strengths to carry forward into the next phase of their programme. They were also able to see where there was room for improvement – and what was needed to fill these gaps.

- **Comparison of internal platforms**: As we had used a similar methodology to benchmark client’s intranet, through their involvement in the DWG Member Forum, the two teams were able to compare their scores, and share insights and lessons.

- **Validation of their current approach**: Through the Innovation Lab, the client’s team was surprised to hear that a number of their initiatives already formed good examples of an effective digital workplace. From opening up their doors to others they were able to compare their own journey with that of others and to validate that they were heading in the right direction.

- **Insight into the “art of the possible”**: As well as identifying the strengths of their own programme, the Innovation Lab allowed the client to see and hear about some of the more innovative initiatives that other organizations had underway within their own digital workplaces. While not all were appropriate for their own business, it helped show them what was possible and to expand their own thinking.
RELATE APPLICATIONS OF THIS SERVICE

Knowing where you are and where you could be are essential inputs to any strategy and roadmap development. Our methods of independently assessing how your intranet and digital workplace are performing, and delivering a bespoke Innovation Lab to show “the art of the possible” and challenge current thinking, could be applied to a number of different areas:

- Assessing the performance of your HR platform, your intranet, mobile apps and other components of your digital workplace.

- Gaining input from other organizations on specific challenges you’re currently facing, from implementing a social intranet to building an effective digital workplace strategy.

ABOUT DWG CONSULTING SERVICES

DWG Consulting Services provides vendor-neutral, unbiased and high-quality advice, and practical hands-on support for digital workplace and intranet programmes. This work is rooted in our decade plus of providing measurement and research-driven membership services and our team’s experience of working within large organizations.

Contact the DWG team to request:

- An exploratory call
- A price quote
- An RFP response
- A statement of work