

Intranet on-line performance support

▶ Introduction

15 weeks to migrate all company processes and procedures from paper to on-line intranet delivery for 2000 Staff - by authoring, reformatting, publishing and rolling out to all Staff.

Intelligent Finance - a division of Halifax plc and now part of Lloyds TSB - offers a range of personal banking products by phone, the Internet and through professional advisers. Intelligent Finance launched in late 2000 and is on target to break even by the end of 2003. By June 2003, three quarters of a million accounts had been opened with the bank and total lending amounted to £14.9 billion. The bank is the market-leading offset product provider in the UK.

Until this project, Intelligent Finance operated as a highly successful company using paper based manuals. Recognition brought about by fast growth in the company generated the need for migration to online procedure manuals within the shortest possible time scale.

In July 2003, Intelligent Finance successfully accomplished this with the rollout of an online business information tool known as "INFORM". The automated web-based intranet publishing solution for the management and distribution of policy & procedures, manuals, training, help and office forms was a large undertaking and potentially culture changing opportunity.

▶ Requirement

The services of ASC were engaged to provide knowledge and best practice advice covering the pitfalls to avoid, how to save time on delivering the project, establishing standards for content, development of authors and how best to employ an integrated approach to deliver training to over 2000 Staff.

"Alan Sneddon provided a highly professional consultancy service to Intelligent Finance Inform project. His unique experience and knowledge was of great assistance to us in managing the change - particularly in guiding the strategic planning for delivery and training of our new business information tool."

Margaret McGeary, Change Management Team, Intelligent Finance

▶ **Approach**

Initially the critical key success factors were reviewed with the client to identify areas for immediate attention and consideration. At an early stage prior to the project starting, main, base line questions were answered for example,

1. How to obtain buy in from people using new on-line procedures as opposed to comfortable paper based personalised manuals?
2. What volume of procedure content was estimated for conversion? Had each procedure been identified including those that may be informally recorded? How well written was the content?
3. How will the change affect various roles across the company?

ASC continued to add value throughout the project by:

- ▶ Advising on developing the most cost effective integrated training solution by working with internal Learning and Development function on the cost analysis of three comparable approaches.
- ▶ Advising on the tasks to focus on during the planning stage of the project in particular the communication with staff beyond the end of the project.
- ▶ Advising on best practise content standards to adopt including the use of Plain English.
- ▶ Reformatting a sample of procedure content within a short timescale to highlight changes to resource requirements for reworking procedure. This resulted in justifying more authoring resources to meet the project implementation target date.
- ▶ Advising on expectations that should be considered for change specialists to ensure third party developers meet required deliverables.
- ▶ Assisting learning and development specialists to develop awareness and skills training for Senior Management, Team Managers and Staff.
- ▶ Advising on light interactive e-learning course design.
- ▶ Reviewing beta versions of content resulting in 31 areas for quality improvements before going live.
- ▶ Coaching staff on a one-to-one basis to become Authors building confidence in their reformatting of content for on-line publishing.
- ▶ Training Authors to deliver training to other groups including measuring training effectiveness.
- ▶ Delivering integrated training sessions.

"ASC gave us something that we did not have - experience in delivering this kind of solution. In particular, we managed to avoid some of the growing pains that are typical in early iterations of content, by giving us guidance on how certain forms of presentation are more attractive to our wide user base, and in doing so will enhance the utilisation of our Inform system. From not being in existence, Inform is now seen as a key tool within the company in less than 6 months."

David Morris, Business Project Manager, Inform

▶ Business Solution

Since HBOS had successfully implemented a similar project previously Intelligent Finance elected to make use of existing software solution from Coextant known as HYPER.NET. This provided the opportunity to improve on existing work completed by HBOS and in return, share new best practice to build improvements to the system employed by HBOS. The new solution provides a central, flexible, maintainable and auditable repository and a single portal for the bank where staff can go to find manuals and search for up-to-date information.

Before work on the solution could commence a team of business authors combined with "reformatters" and change specialists was created to capture all known procedural content and associated forms. Once the initial capture of content was complete, work started on creating the migration plan and standards for conversion to web format.

Early in the project, ASC highlighted two critical factors for deeper consideration that would be key to staff making continued use of the system - the quality of content and the quick retrieval of information. To help address these critical factors ASC provided advice on creating standards for the conversion of paper based procedures to on-line web format and by reworking an existing procedure to illustrate the potential time required and highlight the need to consider more resources for the most resource intensive task of the entire project.

For the roll-out to all staff ASC worked with Learning and Development to design an integrated approach combining light e-learning, minimum class instruction and one-to-one follow-up that ensured the minimum interruption to the business thereby being the most cost effective. At this time, briefings for Senior Managers and Team Managers were developed for internal delivery to ensure the management were aware of all the implications and would effectively manage the change generated by staff answering their own questions and how this would affect team dynamics.

Authors were selected from knowledgeable staff that understood the business functions, were technically competent in using on-line systems and editing using standard MS Office software. Each person received one-to-one sessions with ASC to ensure an understanding of the entire role, how to obtain input from business owners and not least write on-line web versions of the manuals for publication. Instruction on using the HYPER.NET tool was provided by Coextant. The authors became so competent at authoring that they were selected to provide training for other sections involved in the project. To assist with this ASC provided a session on how best to design and deliver training to other people involved in the project including objective measurement of outcomes. Positive feedback from the authors indicated this was well received and saved time.

The final stage of ASC's involvement was delivering awareness training as part of the rollout. ASC presented 9 sessions to Team Managers and 24 sessions to Staff including two days of follow-up one-to-one's. Learning and Development staff ensured that all other staff received training and follow-up sessions. The follow-up sessions although time consuming were of value to business by addressing macro training needs at an individual level and addressing any immediate concerns and promoting feedback from the user community.

The Intelligent Finance Inform project is one of the most effective migration projects that the services of ASC have been engaged for. This case study has omitted the many innovative marketing and communication initiatives used by the change team, marketing team and mobilisation team, to drive the overall awareness of the project.

▶ **Outcome and benefits**

Since going live in July 2003, the content on Inform has approximately doubled and there are now over 100,000 hits a week.

In addition, IF are now looking at a second phase of Inform - introducing non-operational content onto the system which is expected to drive usage up still further.

By implementing the solution based on sound advice from ASC, Intelligent Finance was able to meet its goal of implementing a cost effective solution in a short amount of time, on target and within budget.

If you would like further information on developing high performing teams in your organisation contact Alan Sneddon on 01236 737 897.