Mutualnet 2.0 Communication & Engagement Framework

The company's intranet will undergo a transformation beginning in fourth quarter 2015. What has become an outdated site lacking in consistency and user centricity will become the integrated, state-of-the art core of Northwestern Mutual's evolving digital workplace. This plan covers the three stages of communication about phase 1:

(1) Announcement: June - August. Begin to tease and involve the audience.
(2) Preview: August - October. Build excitement and comfort level through sneak peeks.
(3) Launch: Anticipated for late October (through year's end). Convert audience into skilled users of new environment.

Documents on Mutualnet 2.0 and Sharepoint 2013 org change characteristics offer more background.

Objectives

- *Know:* Generate awareness and understanding of the core concepts and business value behind the new intranet.
- *Believe:* Actively manage this transformation to build excitement and create confidence among our audiences.
- *Do:* Move the workforce to engage quickly with the new intranet, minimizing lost work time.

Audiences

- *Users:* Employees and contractors use the intranet daily, so they'll care greatly about this change. We'll address user group segments (e.g. departments) as needed.
- *Leaders:* From people managers on up to executives, our leaders must stay informed so they can help us navigate change and assist in communicating key messages to their teams. (Segment out leaders of the stakeholders.)
- *Technology/content stakeholders:* Mutualnet coordinators, content contributors (SMEs), SharePoint page owners/approvers and others will play somewhat different roles with the future intranet, so they require unique attention. If this is successful, *they* are successful.
- *Partners:* Members of digital workplace project teams, members of governance and steering/executive committees, sponsors, PC LAN contacts, call center staff, comm consultants/leads and editors/publishers will help us spread the word successfully. (Segment out the influencers vs. simply the ones with impact.)

Strategies

- Integrate right-sized communications into established channels/events (e.g., Coverage, O&T Update, Growth 2015, Employee Town Hall).
- Emphasize the human factor over the tech factor to make the change to Mutualnet 2.0 feel appealing and user-centric (rather than burdensome or intimidating).
- Encourage audiences to invest in Mutualnet 2.0 by giving them chances to offer input and feedback and take part in trial experiences.
- Position Mutualnet 2.0 within the larger context of the digital workplace by creating opportunities to promote related tech advances that align with the intranet strategy.

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- Prepare an engaged group of champions to support communications/conversion at each stage.
- Conduct regular "temperature checks" to assess audience disposition; revise communications as needed to stay on course.

Key Messages

- **Mutualnet's days are numbered! Mutualnet** has been much the same for more than a decade, while intranet technology has been advancing tremendously. Now, thanks to the funding of a large corporate project, we are partnering with a leading digital workplace design firm to create our intranet of the future.
- The new intranet will be **centered on *you*** and the way you work, to make you more effective and efficient and give you more capacity to do work that energizes and inspires you. [That's how we achieve our vision of becoming the center of our clients' financial lives.]
- As we designed the new intranet, we listened to you: **Your feedback has shaped** how it will look and function. For instance, you told us you wanted to make it easier to manage our own careers and locate self-service access to key HR functions.
- **Developing our new intranet is a journey**; this year's launch is only the first step. You'll love the elements you see this year - and you'll love the way we add new capabilities as we go along. Be patient… full transformation takes time.
- The intranet is at the **core of our digital workplace**, connecting us with the many applications, systems and even physical locations we need to access to do our best work.
- Tagline: More business, less "busy-ness"

Features

- One of the first things we'll see, in Q4, is a **new integrated home page** for PCs and mobile devices alike. It's the initial step in bringing key technology tools and resources together - from project sites to news articles, Yammer groups, Skype for Business and more. The new intranet brings content, collaboration and communication into one single point of access. Integrating content from across many different platforms gives users greater access with fewer clicks and makes it easier to find information.
- We'll also enjoy **new "Mutual Me" pages**. They can include employees' subject matter expertise so we can find the people we need to talk to without spending time figuring out who to ask.
- You can **personalize** the home page, with the links and pages that you regularly use front and center, to focus on what really matters to you. Your project sites will be right at your fingertips. Same thing with documents stored on internal servers. Thanks to your personalized home page, you won't waste time searching for information that you use every day. And because it'll be "smart," eventually it will be able to deliver data to you automatically based on your usage habits.
- The new intranet will **target information to you according to your department and role.** Some current systems – such as Mutual Talent – offer similar targeting right now. All important company news is now in one place – a single news feed give you all the latest home office information - including your department news (for 2 functions).
- Our **mobile-friendly intranet** will give us reliable access to the information, expertise and people we need to do our jobs - even when we're on the go. Having a personalized home page with

responsive design accessible on our mobile devices through Good Dynamics will let us keep up on our work and news between meetings, no matter where we're working.

- Companies that develop intelligent social intranets increase efficiency by 25 percent on average (McKinsey). The new intranet will better integrate **enterprise social media**, such as Yammer, to drive collaboration and innovation.
- A **new search engine** offers easy access to what you're looking for. With a single search you can locate both information and people.

The intranet and our culture

- Our people are differentiators — each of us plays a key part in delivering financial security to more people. The ways we're working to do that are changing; we *need* to change. The new intranet provides a catalyst for productive change.
- The line between our physical and digital workspaces is blurring, and our intranet must respond to the way we work today. Our workstations aren't always the best place to do heads-down or collaborative work. The new intranet lets us find a quiet work space - or a room where we all can meet - while remaining connected to everything we need on our laptops or mobile devices. Its options and on-demand access give us the flexibility to work in whatever space is best suited for what we need to do.
- We've completed the first phase of Mutualnet 2.0: establishing the foundation for our intranet development with a new, integrated governance model. Our approach is to provide guidance and discipline in our digital workplace and advocacy for publishers *and users*. Together, we're all responsible for our intranet to increase usability and find-ability of information, people and tools.

For leaders
- The speed of doing business is changing. Our digital workplace is built on a 1990s-era frame that no longer meets the needs of our agile workforce.
- The company recognizes that the world is changing at an accelerated pace. We strive to remain at the center of our clients' financial lives, yet our customers' expectations are evolving and they are demanding well designed simplified experiences from us. The company must enable its workforce to harness its potential and power to deliver to its clients by creating a nimble, collaborative, interconnected and mobile digital environment.
- Our employees' expectations are front and center to this effort. Employees' expectations of what they can do at work are shaped by what they can do in their personal lives. Technology is shaping expectations.
- A well-equipped workforce that adopts and uses powerful technology is crucial in meeting customers' needs and driving growth.
- What you can do: Encourage your team to attend our events (supported by business value rationale), lead by example (go to our events and experience it for yourself), plan to share your reactions at a team meeting.
- Get informed, get connected, get to work.

Tactics

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For more details and continued updates, see separate work plan spreadsheet. This section assumes a company-wide rollout of Phase 1 in October 2015.

ANNOUNCEMENT STAGE: JUNE to AUGUST - Tactics to provide basic understanding of core concepts and begin to solicit audience involvement.

- May-June - Growth 2015 communications for leaders and employees (includes Our Digital Workplace open house, Workplace of the Future Mutual Talk)
- Heads-up communication to tech stakeholders and partners
- Explore opportunity for EO Rally June 3-5
- June 8-12 - Growth 2015 takes place
    - Our Digital Workplace open house features designs (home page, profile page and mobile) plus feedback and name change input opportunities. Also features Advanced Search demos and SharePoint 2013 talking points.
    - Workplace of the Future Mutual Talk featuring Paul Miller links digital and physical workplaces conceptually.
- June - "The Digital Now" monthly Coverage article teases designs and links to discussion group
- June - "Digital Spotlight" monthly O&T Update article spotlights SharePoint team (June)
- June/July - Coverage article
    - Re: name change contest. This may help employees develop more appropriate names.
    - Showcase 2015/2016 designs
- July - launch M2.0 Mutualnet page
    - Designs live here
    - Naming content details here
- July - "The Digital Now" monthly Coverage article showcases final designs (2015 and 2016 versions) and naming contest
- July - Yam Jam re: the new intranet designs to discuss with employees what M2.0 will do for us
- Name the intranet contest tactics (must be complete 6 weeks before it goes out)
- Executive comm support: Growth event tie-in to other EOs (HTML email?)
- Tie-in opps for other DWP projects (Good Dynamics, SharePoint) - create one-pager for them
- Begin regular audience temperature checks - every 2 weeks (add this to an existing meeting?); report to leadership

PREVIEW STAGE: AUGUST to OCTOBER - Tactics to build anticipation and comfort level through sneak peeks and escalating opportunities for audience involvement. Tactics focus on discovery, not promotion.

- Quick-turn videos (shot at open house, one per main feature) pinpoint specific improvements
- Coverage article: New name announced
- Update M2.0 Mutualnet page
    - FAQ
    - New name
    - More designs as they become available
- Coffee talks / YamJams with audience - talking aids in culture/mindset shift
- Employee Town Hall, Sept. 24 - Quick demos and Q&A

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- TLE article – "Mutual Me" page and guiding principles re: poaching, sharing personal info, changing the way we work, purpose. Approach "culture club" leaders?
- September - Interactive version of roadshow w/expanded M2.0 module tied to sneak peek
- September - Sneak peek: Provide an opportunity to "test drive" a portion of the new site while the existing Mutualnet is still online. Is this feasible, technologically?
- Other preview opportunities (Possibilities Centers/Genius Bar? Cyber Cafés?)
- Lottery for pilot participation (opt-in system) if needed
- Share "train the trainer" resources w/tech stakeholders and partners (e.g., PPT, template emails, conference calls, etc.). Visit appropriate team meetings, create lunch events. Equip them to help carry the message or improve our comm plan. Incentive program for these champions (invite good ones to a thank you event). Which elements will resonate for leaders?
- Executive comm support: Karl G's tech talk in Q3 and EO lunch?
- Tie-in opps for other DWP projects - create one-pager for them
    - Mobile Foundations – get Good Dynamics
    - SharePoint 2013 migration news
- Continue regular temperature checks - every 1 week (add this to an existing meeting?); report to leadership

LAUNCH STAGE: OCTOBER to DECEMBER - Tactics to convert audience into skilled users of new environment, with continued opportunities for audience involvement. Tactics focus on discovery, not promotion.

- Continue regular temperature checks - every day for first two weeks, then back to weekly; report to leadership
- Get employees involved in other ways, such as incentivizing them to fill out "Mutual Me" pages; engage leaders and showcase some leader profiles.
- Leadership exchange Nov. 12 - on change leadership and the digital workplace of the future
- Coverage article a day during launch week; each covers a different new feature
    - Should map to the mini-tours offered (see below)
    - Embed the mini-tour videos
- Promo video (a la HP). Not whiteboard style; use designs. Hits highlights.
- Update M2.0 Mutualnet page w/user resources
    - Video mini-tours (each one for a different function: personalizing, search, profile pages, news, hub, etc.). Tie up to promo video.
    - Targeted Solution Studios - demographics? departments?
    - Reference sheet mapping old site map to new
    - Documentation - Update the Mutualnet User Guide with new standards and practices, how to publish, etc.
    - Single Yammer group for questions
    - Dedicated number on Service Center for expert help
    - Physical location for help - Genius bar? Possibilities Centers?
    - What else?
- Scavenger hunt to acclimate users to the new environment.
    - Encourages trial of key M2.0 activities, including visits to the most important pages

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- - Engage employees to populate their profile page
  - Completing all activities earns you a prize (limited time offer).
  - Content should be evergreen to serve as training for new employees
  - Tie to BRAVO - give points for doing scavenger hunt (and other activities?)
- Executive comm support: Share initial metrics with other EOs
- Encourage feedback
  - Include feedback link in every communication
  - Organize feedback collection and quick response process
  - Create boilerplate for answers to common feedback items
  - Hold daily lunches for phone support teams to gather feedback during launch week.
  - Bug/defect checking process
- Tie-in opps for other DWP projects (e.g. Yammer use booklet) - create one-pager for them
  - VPN project tie ins – tutorials in fall
  - Mobile Foundations – using Good Dynamics
- Thank you event for tech stakeholders and champions who helped spread the word

Measuring success

Capture audience's level of awareness (lead measures like visitors, readers of news articles), receptivity (feedback) and connectivity (participation in events and usage) using the following means:

- Results of regular audience temperature checks; larger assessment following each stage
- Number of visitors to the sneak peek, news stories and other special online features
- Number of downloads of training resources
- Number of video views and comments
- Number of Mutualnet visitors upon launch vs. benchmark
- Number of Good Dynamics migrations
- Number of posts in key Yammer groups
- Attendance at events: open house, coffee talks, Yam Jams, etc.
- Number of participants in incentive programs
- Feedback from technology stakeholders and partners
- Feedback from users

Communications & engagement working team

- Org change management and training: Bernadette
- Communication planning: Sue
- Metrics: Anu/?
- Feedback (sustainability, launch, etc.)
- Administrative help: Ben
- Bug/defect tracking management: Check with scrum team (Mary Z?)

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APPENDIX A - Project Milestones

June x   Initial designs available

June xx Final designs available

June-Aug - SharePoint page testing/building environments

Aug-Nov - SharePoint pages moved to 2013 platform

Late Oct - Anticipated rollout of new intranet

2015 Q1 - SharePoint pages updated w/new 2013 features

APPENDIX B - Related Communications

See the separate [SharePoint 2013 Communication plan](#).

Below is a timeline for activities surrounding the **Mutualnet Name Change** plan.

Date	Tactic
May 20	Mutualnet Governance/Steering Committee meeting – Amii to talk about the approach we plan to take for naming the new Mutualnet.
May	Research temperature check with employees.
June 10&12	Digital Workplace open house – promote the name crowdsourcing on Yammer, include a box to take suggestions people have while at the event. Mutualnet page live with name change contest info.
June/July	Coverage article – update on Mutualnet 2.0, learn more about the new digital workplace that will replace Mutualnet and ask for name ideas using Yammer (crowdsourcing).
July	Evaluate the results of the crowdsourcing project and present a list of naming possibilities to the Mutualnet Governance/Steering Committee meeting (include all stakeholders at this meeting). Get their input and develop a short list of names for a Yammer Poll.
August	Yammer poll to name the new Mutualnet. Include videos from those who suggested the names to encourage voting – give a prize to the winner.
September	Announce the new name (dev needs it six weeks before launch).

APPENDIX C - Creative Solutions deliverables

- Videos (promo, quick-turn and tutorial)
- Reference cards
- Adjusted designs (2015 and 2016 versions)
- Growth 2015 Open House signage and promotion
- More to come