

Project Note

Intranet for Client Advisors

A Zühlke Coach trained the project team of a regional Swiss bank, who is in charge of the intranet. All team members profited immediately and could use the new skills in different methods of Usability Engineering.

Task

The task pertained to a new intranet system being created by Schaffhauser Kantonalbank for its team of client advisors. The first stage of the project entailed working out the technology, content and design of the system. A key criterion was good usability. The system was to be used by advisors to provide clients with top quality advice under time pressure and also by the bank to give staff continuous training on bank products and processes. Schaffhauser Kantonalbank therefore decided to employ user centred design and to build up its own expertise at the same time.

Implementation

Methodical procedures are difficult to learn in the classroom. People need to put into practice what they learn. Team enabling was employed to combine training with actual work on the project. The team received an overview of user centred design and then integrated this method into a project plan.

At this stage in particular, employees had to figure out how the methods were applied in practice:

What issues did a given method address and what issues did it not address? The team also had to be clear about the issues involved in the project and the relative urgency of addressing each. The team started out with contextual inquiry and design, first receiving a theoretical introduction and then immediately putting this theory into practice.

The coach helped the team with modelling and discussed the results with them afterwards.

The characteristics of the client advisors' work environment determined the content of the intranet and provided guidelines for its design.

Cognitive Walkthrough was another method they applied. This review method is based on the prior



knowledge one needs about a given set of facts and circumstances. By using it, the project team could gauge how easily the intranet content could be understood.

Methods used

- Team enabling
- Contextual inquiry and design
- Personas
- Card sorting
- Prototyping
- Heuristic evaluation
- Cognitive walkthrough
- Simple usability testing

Customer benefits

- With team enabling, Schaffhauser Kantonalbank profited from the knowledge and practical skills for its team. The new methods were able to be applied immediately. The coach assisted the team and was able to intervene at any time.
- The methods employed were quick to learn and of great benefit to the client advisors. Schaffhauser Kantonalbank profited immediately from user centred design and can now design its intranet based on user needs.



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