

KPMG Client Collaboration Template

UX CASE STUDY



**To comply with my non-disclosure agreement, I have omitted and obfuscated confidential information in this case study. All information in this case study is my own and does not necessarily reflect the views of KPMG.*

BY
Keren Goldman

KPMG Client Collaboration Team Sites

Teamwork is the foundation of winning pursuits and engagement management.

Things happen fast at KPMG. The teamwork required to win pursuits and manage engagements is no exception. Centralized teamwork is one way that everyone gains access to the information they need. KPMG Central sites create an environment for employees and clients to facilitate collaboration with remote teams. It is a secure virtual collaboration platform for KPMG and clients to share documents and information while working together. On a team site home page, engagement teams can securely view links to shared files, tasks, announcements, contacts and calendars. These sites also provide functionality for tracking the progress of document submission in accordance with pre-defined time stamps such as; submission date, review date etc. A KPMG Central team site connects teams to the content and information users rely on every day.

The Problem:

“Keren – we definitely want a ‘wow’ factor It needs to look like something that was developed using modern web technologies, not SharePoint”. – KPMG Audit Senior Manager

SharePoint is the firm approved technology platform with UI restraints that publishes out of the box pages and libraries with an outdated look and feel. Team sites were being built using archaic SharePoint out of the box templates. Stakeholders and clients were primarily focused on aesthetics. Over the past few years functionality improvements were made and features were being added but because of the outdated interface, users saw it as being an antiquated system. One critical pain point we heard over and over was that team sites were not mobile optimized leaving users on the go with a subpar experience. I needed to design a solution that presented a bespoke veneer over standard SharePoint pages, lists and libraries. I embraced these constraints from the outset and strived for a clean and simple solution.

The Solution:

It was quickly apparent that stakeholders, clients and users were reacting to the look of the environment that had not been upgraded in years. The solution was to create a responsive user-centric experience, using SharePoint, that looks custom. With a focus on visual redesign, I created a holistic experience, user flows and interfaces that are simple and modern. I designed an intuitive mobile experience that looks and feels like an app. I knew that if the mobile experience required heavy time investment from users or didn't provide an easily perceived tangible benefit, it would fail regardless of the modern design. I also wanted to enhance brand recognition for external client users. An innovative and useful online experience can directly and positively have an impact. Faced with a delightful user experience, brand value grows exponentially in the mind of the client. Increased brand value equates to greater brand loyalty, leading to increased repeat and referral business.

The Result:

Now that the new customized workspace is part of the KPMG's collaboration toolbox, productivity is accelerating, and teams are working better together. Improved efficiency, thanks to a reduction in the many face-to-face meetings that used to be the mainstay of collaboration on campus. Today, teams use collaboration sites to work together without leaving their desks. For users on-the-go, the new KPMG Central template provides enhanced functionality for a mobile optimized collaboration experience. I passionately built the KPMG brand by creating actionable solutions for digital imagery that saved time and drove measurable impact. These improvements resulted in a significant reduction in support calls from users.

The Approach:

User Insights & Ideation:

- I partnered with the project manager to uncover insights and translate nebulous concepts into designs that address our users' behaviors.

Experience Strategy & Vision

- I created sketches, wireframes, prototypes and an HTML proof of concepts to share the vision, design principles and strategy. This helped to socialize ideas, gain alignment and drive decision making.

Planning & Scope Definition

- I defined the product with the project manager and stakeholder partners. I advocated for user goals and balanced business goals. I prioritized and negotiated features for launch and future roadmap.

Design Execution & Validation

- I designed for an optimized responsive experience on iPad and mobile. I executed task flows, sketches, wireframes, prototypes and design specs.

Oversight & Coordination

- I provided hands on instruction to the development team to translate product features for each platform context and ensure correct deployment of aesthetics and functionality.

Leadership

- I designed up and presented work to gain buy-in from leadership, senior stakeholders and many other KPMG teams throughout the project lifecycle.

The Discovery

On my journey to customizing a fresh look and feel, I had to turn everything from nebulous concepts and specific ideas into useful features in order to advocate for the user in the design decisions. Design freedom is high at the beginning of a project when we know the least. Getting involved early and collaborating with the development team allowed me to incorporate good ideas before the design was frozen.

Interviews

Since this project would change the digital face of client-facing collaboration we interviewed executive leadership and engagement teams. We then cross-referenced the results with feedback from users, support call transcripts, unsolicited redesigns and emails.

We looked at these questions early:

- *How do we make the template more practical?*
- *Who are our users and what are their goals?*
- *What areas are critical to overall success?*

Key Findings

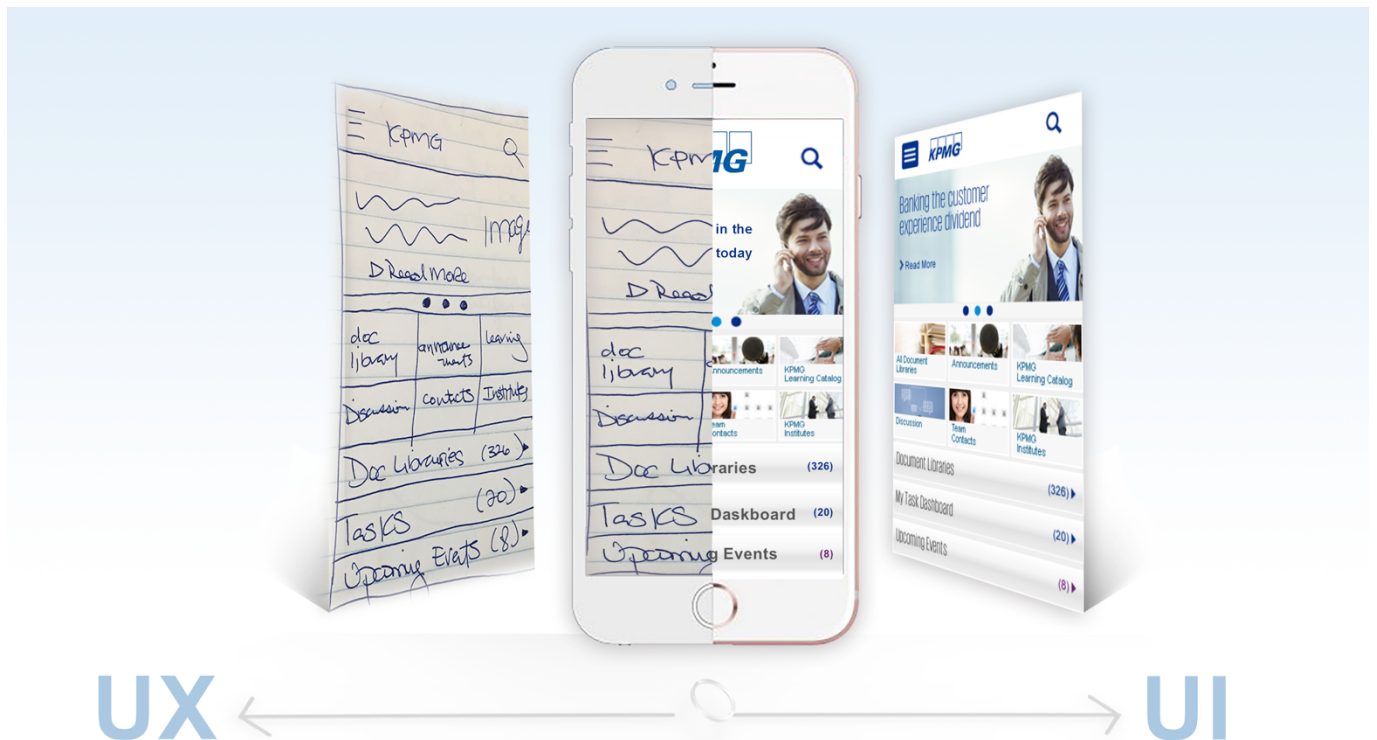
Clients and KPMG users were reacting to the look of the environment that had not been upgraded in years and wanted to see something dynamic and intuitive. Stakeholders did not want “the traditional stale and boring SharePoint Site like KPMG always has”. While stakeholders were focused primary on the design, it was apparent that users were more concerned with a mobile optimized platform.

Setting the Design Direction

The visibility of this project meant that I needed to have everything figured out before teams would commit to moving forward with the work. Teams involved in the project needed to see it in a tangible way. For each feature, I went through cycles of requirements, consensus, approvals, detailed specs and handoffs. My process involved sketching and wireframing concepts and flows with my team and then translating these directly into hi-fidelity designs. My next step involved creating a responsive HTML prototype for stakeholder and user feedback. In the early stages I focused mostly on representing the highest risk areas of the design. Later phases allowed me to focus on micro-interactions.

Sketching Interfaces

I used paper prototyping techniques to bring the mobile designs to life and evaluate them with stakeholders and users. This helped me work rapidly and led me to consider more ideas. Sketching concepts helped me form a broader view earlier ensuring a more cohesive design across devices.



Wireframes

For the project to be successful, it was critical to secure the content architecture early before diving into design details.



Hi-Fidelity Mockups

To move forward with designs I used Photoshop to create sets of detailed mockups. This approach was beneficial in showing our stakeholders design progress and obtaining leadership buy in.



Proof of Concepts and Usability Testing

HTML prototypes were the most effective way to gain meaningful feedback from the team, consensus from stakeholders and approval from senior leadership. I was able to easily distribute the link and reuse them for usability testing.

I used a bootstrap framework to bring designs to life as a working responsive prototype. Demonstrating requirements face-to-face and discussing constraints and possibilities was an effective way of collaborating with the development team. We worked collaboratively, tested and iterated progressively.

[VIEW HTML PROTOTYPE >](#)

Assets and Annotations

We had to overcome bandwidth challenges in order to deliver optimized solutions for desktop, tablet and mobile. I succeeded in dealing with resource constraints by providing annotations, assets and hands on instruction to IT and offshore teams to ensure correct deployment of aesthetics and functionality. Providing CSS annotations improved development productivity through more efficient front end development and fewer code revisions.

The image illustrates a design and development workflow. On the left, a computer monitor displays a website with various CSS annotations. A blue box labeled "CSS ANNOTATIONS" points to the hero section. The annotations include:

- hero image:** width: 571px; height: 273px; hero-img1.png
- hero title:** margin-top: 24px; margin-left: 34px; color: #00338D; font-size: 42px; font-family: 'KPMG Light' Arial, Helvetica, sans-serif
- hero abstract:** margin-top: 20px; margin-left: 20px; color: #00338D; font-size: 16px; font-family: Arial, Helvetica, sans-serif
- hero links:** margin-top: 20px; margin-left: 20px; color: #00338D; font-size: 12px; font-family: Arial, Helvetica, sans-serif
- hero links: hover:** text-decoration: underline; hero-link-bullet.png

Other annotations on the monitor include "width: 571px; height: 22px; color: #fff; transparency 70%" and "leverage carousel CSS".

On the right, a design guide is shown:

- TYPOGRAPHY:** KPMG Light, Arial
- COLOR PALETTE:** Four color swatches with hex codes: #00338D, #005EB8, #0091DA, #6D2077
- ASSETS:** A row of three image assets showing business professionals.

The Result

Out with the old, in with the new.

Old UI



Visual storytelling for the modern web

The Stakeholder wanted a way to display multiple news articles and tiles without the user having to refresh the page. Their requirements were to optimize the hero space to prevent scrolling and have motion in the header while providing a slick and modern visual.



Simple, yet highly visual, content tiles let editors make near-instant updates to keep pace with the ever-changing news cycle.

Template Driven Publishing Approach

I drove the design and implementation of a custom responsive hero space carousel that features a photo, headline and teaser for each article along with the ability for each slide to have multiple calls to action. I aimed to invoke the feeling of a bespoke design while controlling the presentation of content so publishers can focus on content quality and authoring efficiency. This new web part merges the front-end aesthetics of a custom solution while being driven by technology that locks users into a template that can be easily updated and maintained within the current SharePoint platform. The templated solution ensures consistency with visual identity and brand expression while allowing flexibility for users. **This scalable innovation became the firmwide standardized solution for implementation on all Team Sites and US Portal pages.**

Faster, Easier Content Management

On the backend, site owners can easily update the news articles (and featured tiles) by selecting a photo from a predefined library of brand approved images and entering the headline, abstract and link(s). While developing the hero space carousel we realized that all of the KPMG brand approved images were portrait orientation and targeted for print collateral. I knew from our user interviews that image editing was a frustration that resulted in increased help-desk calls during page set up. I overcame the hurdle of print specific imagery by manually converting brand approved images for digital use in order to build and protect the KPMG brand. I predefined image sizes and focal points so that users can simply select from the image gallery without the need to fuss around with photo editing. **This improvement resulted in a library of over 500 digital images which enabled users to successfully add photos and complete page builds, as well as a decrease in help-desk calls saving time and money.**

Centralized medium for managing documents

A team site is used to store and collaborate on files or to create and manage lists of information. A document library provides a secure place to store client or project related files where users can find them easily, work on them together and access them from any device at any time.

Old UI

Old UI

KPMG
cutting through complexity

BROWSE PAGE

Search this site

External Engagement Template

KPMG Documents

+ new document or drag files here

Current View ... Find a file

| Name | Modified | Modified By |
|-------------------------------------|------------|-------------------|
| TestFolder | October 11 | Goldman, Keren L. |
| TestNotebook2013 | 6 days ago | Goldman, Keren L. |
| KPMGCentral-DigitalLicenseAgreement | October 11 | Goldman, Keren L. |
| Users_ExportIntProjOct11 | October 11 | Goldman, Keren L. |

Shared With Client

+ new document or drag files here

Current View ... Find a file

There are no documents in this view.

New UI

New UI

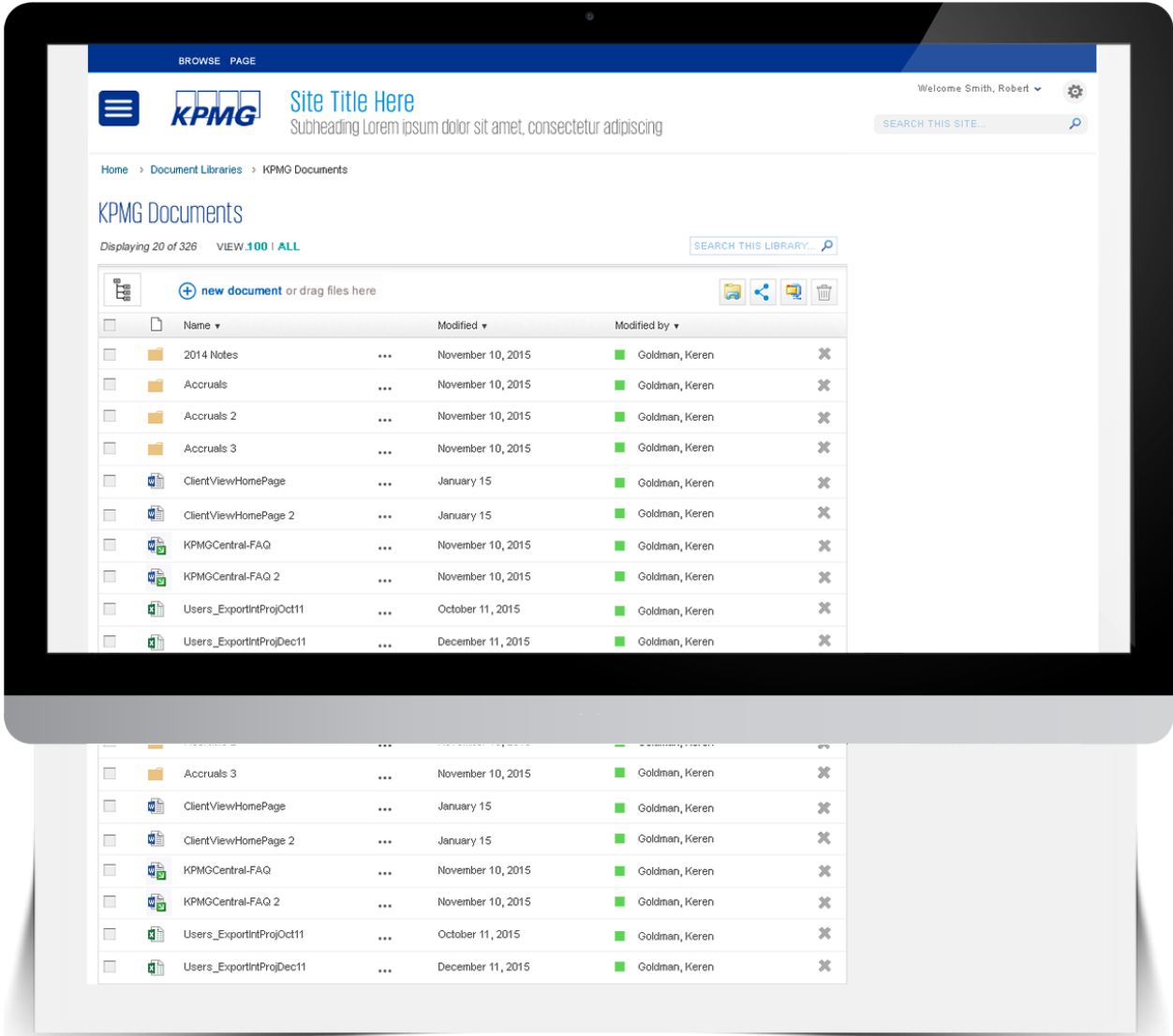
Welcome Smith, Peter

SEARCH THIS LIBRARY

Modified by

| | | |
|--------------------------|-------------------|---|
| ber 10, 2015 | Goldman, Keren L. | X |
| ber 10, 2015 | Goldman, Keren L. | X |
| ber 10, 2015 | Goldman, Keren L. | X |
| November 10, 2015 | Goldman, Keren L. | X |
| January 15 | Goldman, Keren L. | X |
| January 15 | Goldman, Keren L. | X |
| November 10, 2015 | Goldman, Keren L. | X |
| November 10, 2015 | Goldman, Keren L. | X |
| October 11, 2015 | Goldman, Keren L. | X |
| December 11, 2015 | Goldman, Keren L. | X |
| November 10, 2015 | Goldman, Keren L. | X |
| November 10, 2015 | Goldman, Keren L. | X |
| November 10, 2015 | Goldman, Keren L. | X |
| November 10, 2015 | Goldman, Keren L. | X |
| January 15 | Goldman, Keren L. | X |
| Page 2 | Goldman, Keren L. | X |
| Central-FAQ | Goldman, Keren L. | X |
| Central-FAQ 2 | Goldman, Keren L. | X |
| November 10, 2015 | Goldman, Keren L. | X |
| Users_ExportIntProjOct11 | Goldman, Keren L. | X |
| Users_ExportIntProjDec11 | Goldman, Keren L. | X |

Each document library displays a list of files, folders, and key information about each, such as who created or last modified a file.



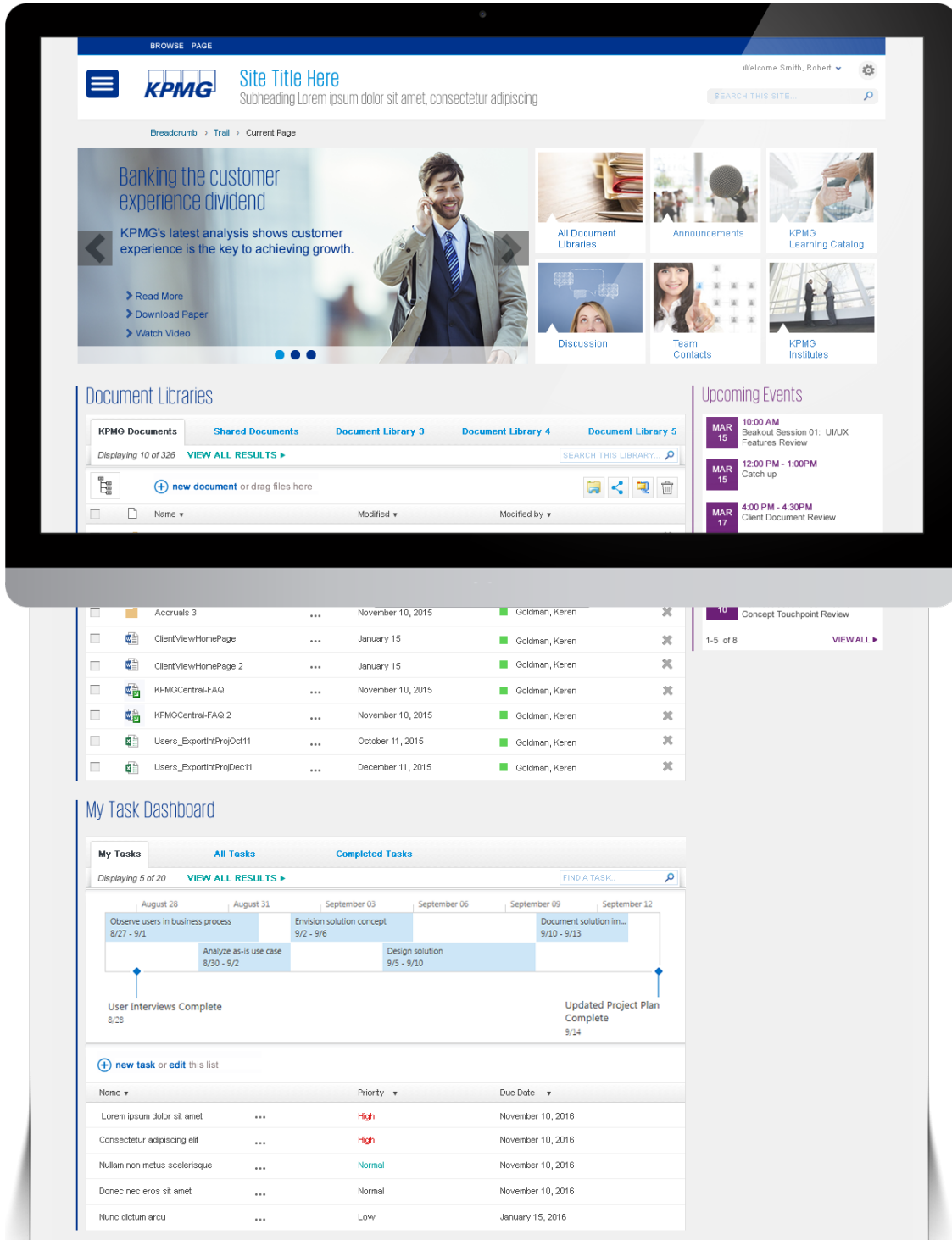
Responsive Design

In our modern digital world, an optimized and consistent experience is simple necessity – and user expectation – regardless which device is being used. I created a smooth, familiar experience across all platforms.



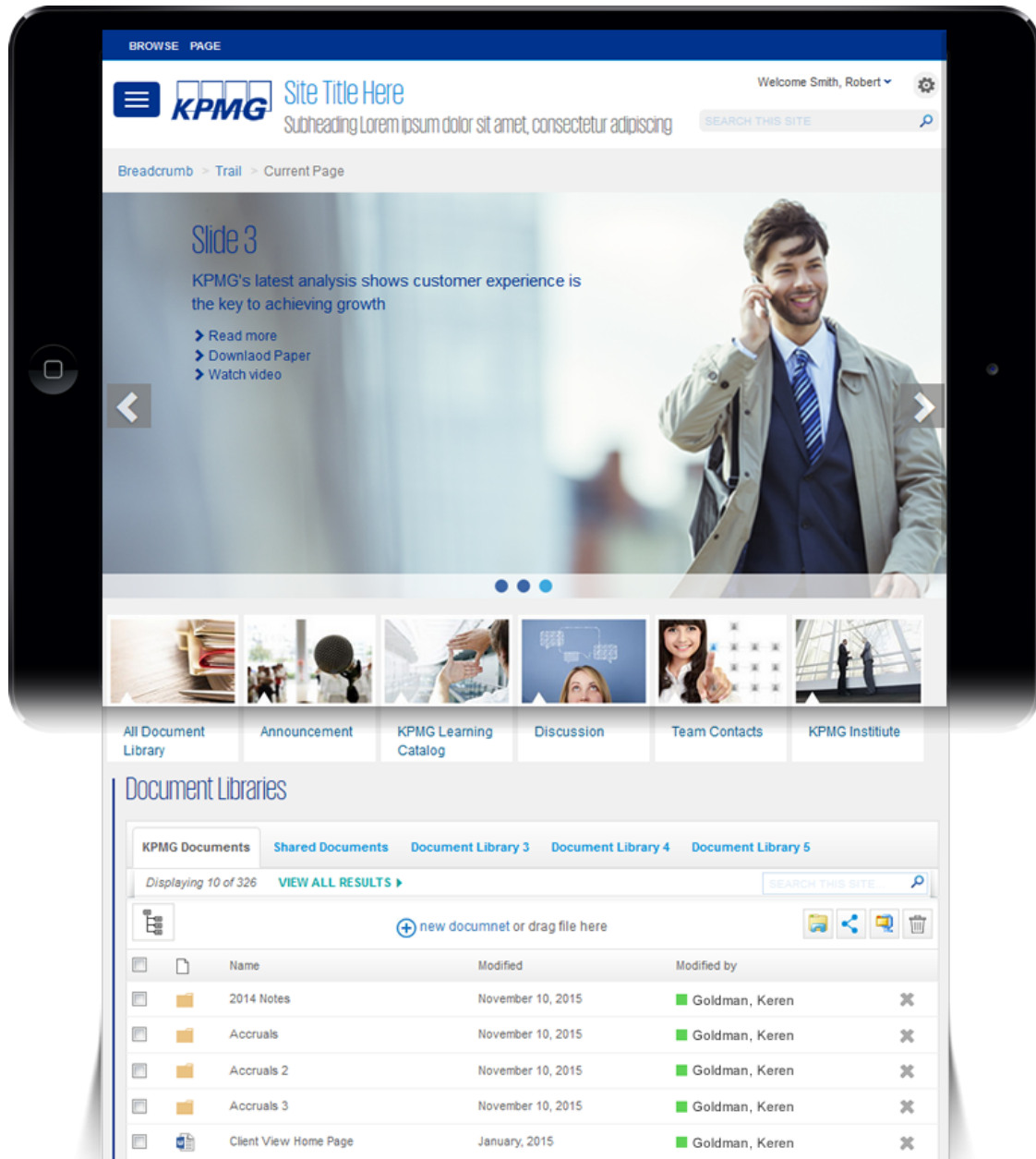
Desktop

I redesigned the template to be fully responsive across devices with a layout and visual style optimized for content discovery. The core experience is built for the desktop, the primary hub for collaboration team sites.



Tablet

The tablet environment offers a touch-based experience that mirrors the desktop. On-the-go access to all features and functions is critical to pleasing users in the field.



Mobile access to consolidate data

The responsive interface provides quick and timely access to the most pertinent information at exactly the right time. Business critical documents, files and calendars can be easily accessed by users on the go. This is what today's user wants, needs, and expects.



Recognition

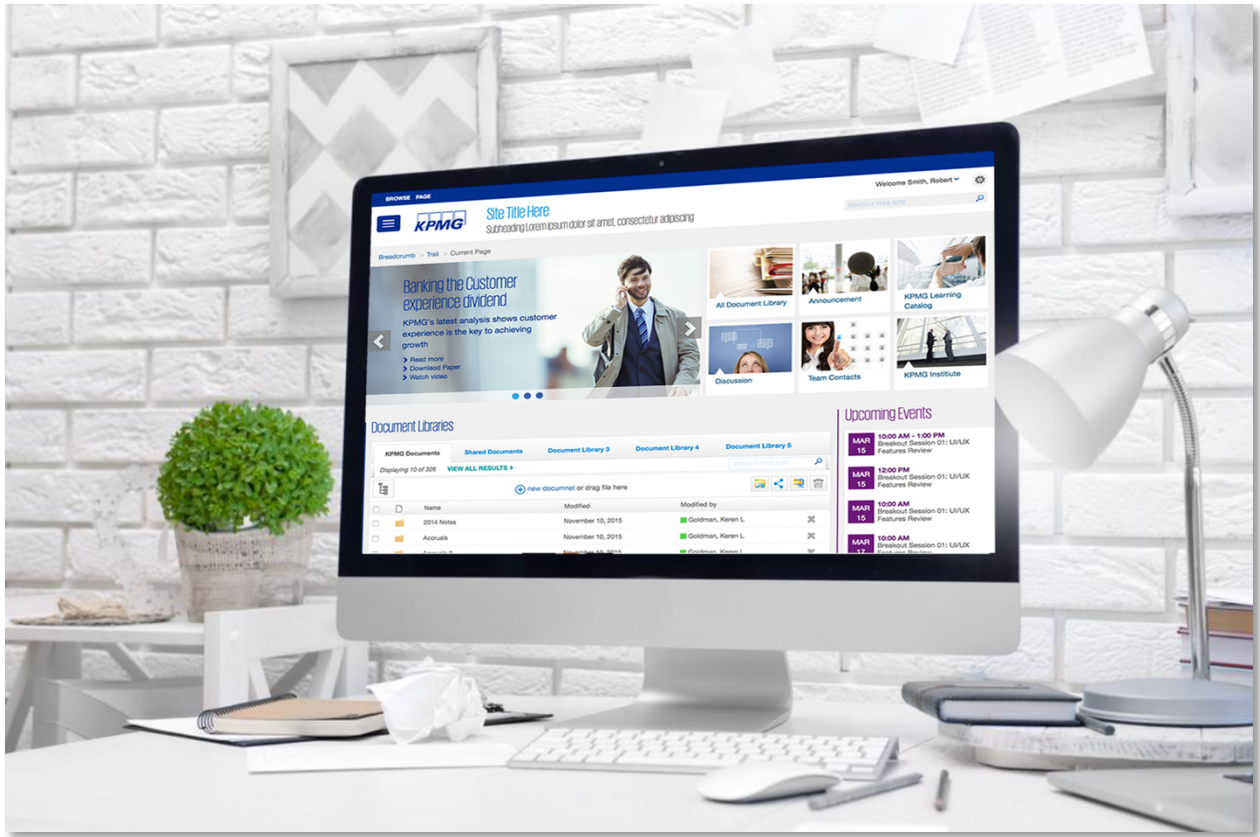
“ Keren exceeded high levels of expectation to blend technology solutions and valuable user experiences for both internal users & external clients within our limited SharePoint platform.

She successfully overcame the restraints of technology

to create a scalable user experience by applying improvements to SharePoint web parts, document libraries, buttons, navigation and secondary out of the box pages.”

**KPMG Knowledge & Collaboration
Management Associate Director**





Let's Collaborate

HIRE ME: KERENGOLD@GMAIL.COM