

# Citizens Bank Community Intranet

Case study

# Overview

Community is part of the Citizens Bank credo, and a core part of what Citizens Bank is all about. Between 2012 - 2018 the site went through a series of updates and revamps. This case study highlights the strategy and methods behind these re-designs.

**2011**

**2012**

**2015**

**2017**

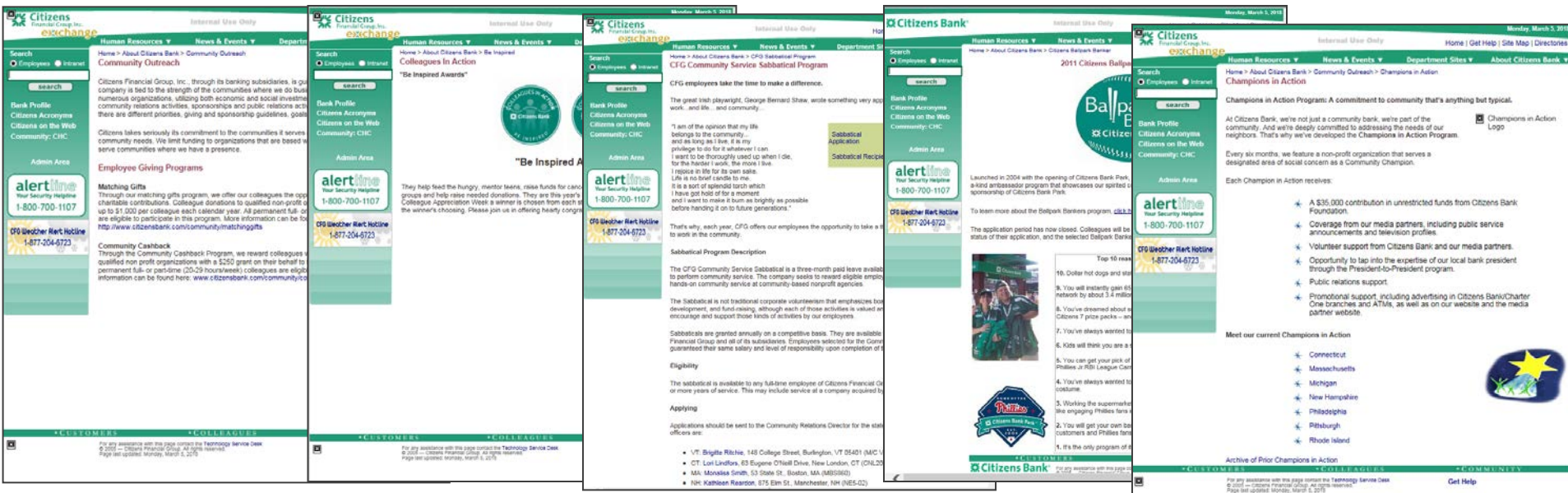
**2018**

Note: many images in this brief are intentionally blurred for privacy considerations

# Overview

Prior to 2012 the Community site was on the **old Citizens template** and was positioned as “Community Outreach”. Over time the site became a “spider web” of pages without a clear picture of the community mission and value proposition.

The site was difficult to navigate and often took in excess of 3-4 clicks for colleagues to get to the information they were looking for.



## Overview - 2012

The community team decided to re-brand and re-position “Community Outreach” as “Citizens Helping Citizens”.

- This change represented a more active corporate and colleague culture
- The team went back to basics to define what they represent and what information was most crucial to colleagues



When our communities prosper, we prosper. That simple concept - when backed by 20,000 colleagues and a company with a 185-year history of giving back - can be a powerful force. **Citizens Helping Citizens** is an effort to harness that power by bringing together the full range of our community outreach.

# Overview - 2012

The team wanted to clearly focus on two areas.

## Colleague Involvement

- Colleague Giving Campaign
- Volunteering
- Matching Gifts



## Corporate Giving

- Fighting Hunger
- Strengthening Communities
- Teaching Money Management



# Overview - 2012

The Digital and Community teams partnered closely over several weeks to define the priorities and goals for each of the 6 components. We addressed the important questions...

- What do colleagues need to know?
- What actions should colleagues take?
- What are the goals (qualitative and quantitative)?
- What defines success?
- What information is time sensitive?
- How will colleagues find this information?
- Why is this important?
- Who owns this information?
- How often does this need to be updated?
- Who can colleagues reach out to if they have a problem or question?



"In school, we're rewarded for having the answer, not for asking a good question." - *Richard Saul Wurman*

# Overview - 2012

During this phase, we...

- Met...and...
- Discussed...and...
- Gathered requirements...and...
- Established a comms plan with a timeline...and...

"If you don't know where you are going. How can you expect to get there?" ~ *Basil S. Walsh*

# Overview - 2012

We established the priorities for the site.

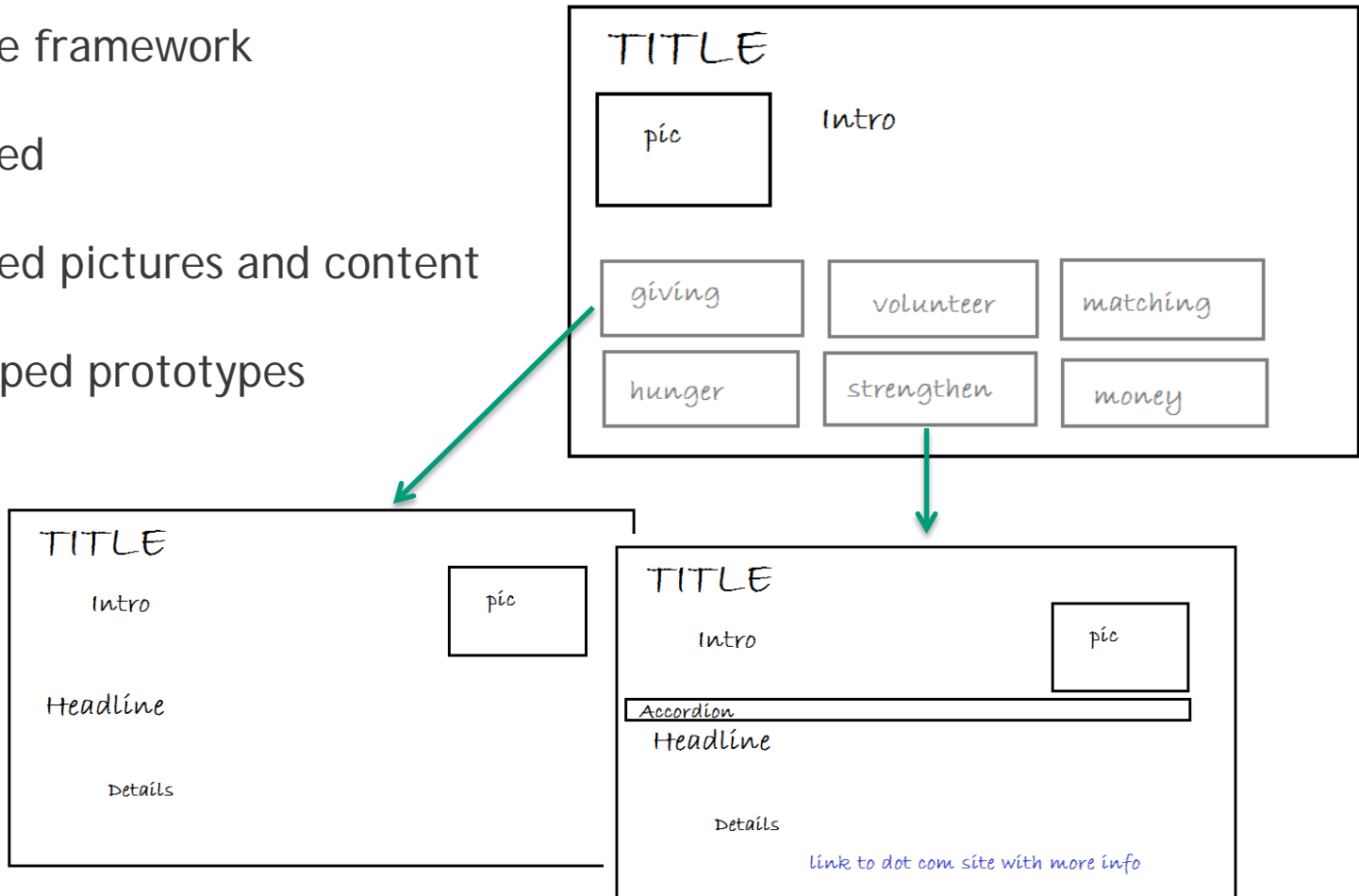
- There were **6 core elements** - each should be visible from the landing page
- The new site would launch shortly before the **Annual Giving Campaign** kicks off, that campaign should have the strongest focus
- The community team was working with a vendor on a new portal for logging **volunteer hours**, that should have the second strongest focus
- The team wanted to promote **matching gifts** more heavily, that should have the third strongest focus

**Style Guidelines:** the Digital team introduced a new template in 2012, the new site would follow all the standard guidelines for colors, layout, navigation

# Initial Layout, Landing page - 2012

Then we...

- laid the framework
- sketched
- gathered pictures and content
- developed prototypes



# Initial Layout, Landing page - 2012

**Citizens Bank** Thursday Mar 22, 2018  
[Get Help](#) | [Sitemap](#) | [Directories](#)

Human Resources News & Events Department Sites About Us

● Employees ○ Intranet  
search

## COMMUNITY: CITIZENS HELPING CITIZENS

"When our communities prosper, we prosper. That simple concept - when backed by 200 years of a company with a 185-year history of giving back - can be a powerful force. Citizens Bank's effort to harness that power by bringing together the full range of our community involvement through charitable giving and colleague volunteerism, we will continue to make a difference in those communities where we live and work. That's what good banking is all about."

Ellen Aleman  
Chairman and CEO  
RBS Citizens Bank

- Colleague Giving Campaign**
  - ▶ About the Campaign
  - ▶ FAQs
- Volunteer**
  - ▶ Guide to Volunteerism and More
  - ▶ Log Your Volunteer Hours Now
- Matching Gifts**
  - ▶ Guide to Matching Gifts
  - ▶ Register Matching Gifts
- Fight Hunger**
  - ▶ Learn About Our Local Programs
- Strengthen Communities**
  - ▶ Learn About Our Local Programs
- Teach Money Management**
  - ▶ Learn About Our Local Programs

Content manager: Internal Digital Communications  
Intranet content updates and requests

Information classification: Internal  
[Legal](#) | [Intranet Copyright](#)

**Crucial recommendation:** keep "Community" first in the tag line. It's important to reinforce that "CHC" is about **Community**

**Crucial recommendation:** feature a picture and quote from our Chairman and CEO, it's essential to reinforce that community is part of our credo

**Crucial recommendation:** FAQs and supporting guides should be available from the landing page, colleagues should have this information up front, within one click

# Initial Layout, Sub pages - 2012

Thursday Mar 22, 2018  
[Get Help](#) | [Sitemap](#) | [Directories](#)

Human Resources News & Events Department Sites About Us

Employees Intranet

Home > Citizens Helping Citizens > Colleague Giving

## COLLEAGUE GIVING CAMPAIGN

Thursday Mar 22, 2018  
[Get Help](#) | [Sitemap](#) | [Directories](#)

Human Resources News & Events Department Sites

Employees Intranet

Home > Citizens Helping Citizens > Volunteer

## VOLUNTEER

Good Citizenship Starts With You

A good bank is at the heart of a community and we our colleagues who dedicate their time to charitable

Community: Citizens Helping Citizens

- Home
- Provide Shelter
- Volunteer
- Matching Gifts
- Fight Hunger
- Strengthen Communities
- Teach Money Management

Our Business Lines -

Resources -

Programs & Initiatives -

Policies & Guidelines -

Key recommendation: for longer pages, use tabs to separate content topics

Thursday Mar 22, 2018  
[Get Help](#) | [Sitemap](#) | [Directories](#)

Human Resources News & Events Department Sites About Us

Employees Intranet

Home > Citizens Helping Citizens > Matching Gifts

## MATCHING GIFTS

### Double the Impact of Your Giving

You give a dollar, we give a dollar – that's the idea behind our Matching Gifts program. It's an easy way to double your gifts to your favorite nonprofit organizations. It's also a valuable employee benefit worth up to \$1,000 each year. The minimum gift size is \$25.

To learn more about the program, visit the Citizens Bank or Charter One Matching Gifts Program site.

### Who Can Participate?

**To Give:** Any colleague who is employed full or part-time (20–29 hours per week) may apply for matching gifts.

**To Receive:** An organization must have federal tax-exempt 501(c)(3) status and meet other criteria in the program guidelines to receive matching gifts. Political, religious, fraternal and professional organizations are ineligible.

### How to Get Started

- Log-in to the Community Portal with your Employee ID and password for the portal. (If you are a first-time user or if you have forgotten your password, you will need to request a system-generated password.)
- Select Matching Gifts and click "I Accept" for the program guidelines.
- Search for the nonprofit organization by name or Federal Tax ID; click "select" when you find the correct organization.
- Enter the amount, type and date of your gift, then click "Save and Proceed."
- Generate the nonprofit receipt form with verification instructions and forward, by mail, fax or email, to your designated nonprofit organization. Once the nonprofit has confirmed your contribution, we will match your gift as part of our quarterly payout.

Questions? Email [community@rbscitizens.com](mailto:community@rbscitizens.com)

Key recommendation: use larger pictures and larger headlines to clearly differentiate sections

# Initial Communications -2012

Since the site launch was timed to coincide with the annual giving campaign, we determined this would be the focus of the site for the first month (after a two week initial promo period).

## What is the Giving Campaign?

It is the one time of year that colleagues can enroll in payroll giving to contribute to the organizations important to them. The campaign is open for a 3 week time period during Sept - October.

**Total Participation in  
Colleague Giving Campaign**



From now until October 12, you can participate in the **Citizens Helping Citizens** Colleague Giving campaign to enroll in automatic payroll deduction for 2013 and easily match gifts.

Our goal is to double participation and awareness. When you receive your email, please take the time to visit the campaign site to select "Payroll Deduction" or "No Donation." Both options help us to reach our goal.



# Ongoing Communications 2012 - 2015

The team established an on-going cadence for **Campaigns**:

- each campaign should have a comms plan establishing time frames and goals. Campaigns should be promoted as a feature story on the Corporate Intranet home page, and on the Community landing page.



Feature



# Ongoing Communications 2012 - 2015

The team established an on-going cadence for **BAU Updates**:

- BAU updates regarding community stories such as colleague volunteer efforts and ongoing corporate initiatives would be promoted in the “In our Communities” section of the Corp Home page.



Depending on the level of the initiative this could link to either a news page or back to the community landing page



# Overview - 2015

In mid 2015 the Community team felt it was time to conduct a deep dive on the site and assess both the content and usability factors for colleagues. Several key items were identified:

- Given the number of ongoing programs there were **10+ pages to manage**
  - Other areas within the company began moving away from multiple pages and consolidating to one page with tabs and accordions
- The Giving Campaign remained a yearly focus on the landing page, even though the campaign **only lasted a few months**
- The **branding was outdated** and did not reflect the new corporate color palette
- The landing page was **fairly static**, outside of the campaign promos
- A **new awards program** had launched but was not fully represented on the page

# Overview - 2015

We went back to the drawing board, and asked some new questions:

- What has changed since 2012?
- Is there anything new that colleagues need to know?
- What is most important for colleagues?
- Does the site truly represent our core community values?
- Are there new goals (qualitative and quantitative)?

Then, we repeated the process that worked, and we...

- Met...and...
- Discussed...and...
- Gathered requirements...and...
- Established a comms plan with a timeline...and...

"Talent wins games, but teamwork and intelligence wins championships."

~ *Michael Jordan*

# Overview - 2015

We re-established the core priorities for the site. The site should...

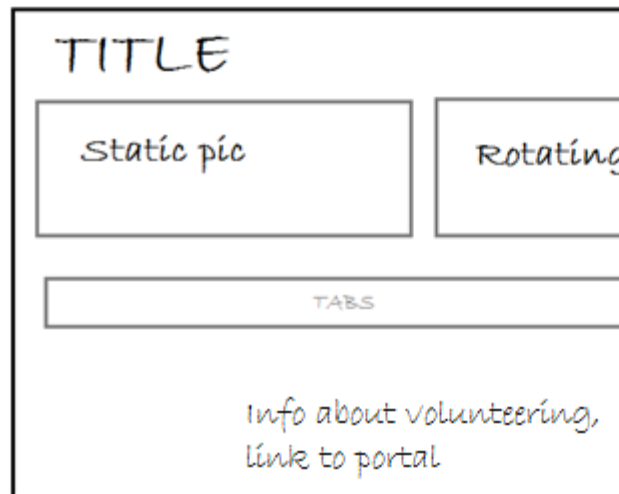
- be more visual and leverage pictures from a new annual community report
- reflect the new corporate colors
- be consolidated to a tabbed page, keeping in-line with other sites
- reflect the current community priorities and positioning - with volunteering being the highest priority
- provide information on the community award and volunteer training programs

**Style Guidelines:** the Digital team introduced a new style sheet in 2014, the new site would follow all the new standard guidelines for colors, layout, navigation

# Overview - 2015

Then we...

- sketched
- gathered pictures and content
- wrote new stories
- developed prototypes



# Site launch- August 2015

Prior to site launch we established new site guidelines: volunteering will be the first tab, unless there is another initiative that should be highlighted.

Thursday Mar 22, 2015  
Get Help | Sitemap | Directories

Human Resources News & Events Department Sites About Us

Employees Intranet  
search

Home > Community: Citizens Helping Citizens

## COMMUNITY: CITIZENS HELPING CITIZENS

Volunteerism strengthens our communities  
We perform little acts of kindness.

Volunteer Manage Money Fight Hunger Provide Shelter Strengthen Communities Matching Gifts

Be sure to get your volunteer T-shirt in time for Credo Week!

**LOG OR PLEDGE 5 OR MORE VOLUNTEER HOURS OR PLAN TEAM ACTIVITY WITH 5 OR MORE COLLEAGUES to get your t-shirt!**

Volunteerism helps us all.

Volunteering helps strengthen our communities and provides colleagues a sense of satisfaction by sharing their skills and talents with others.

Whether helping a local nonprofit, coaching youth athletics, or supporting their children's school activities, our colleagues show their commitment when they volunteer. Read about CEO Bruce Van Saun's firsthand look at how we make a difference.

**Citizens' New Volunteer T-shirt**

Colleagues who log or pledge a minimum of 5 volunteer hours in the Giving Portal or plan a volunteer activity for 5 or more colleagues by August 31, will receive a newly designed Citizens Bank volunteer t-shirt in time for Credo Week in October. Choose the appropriate button to the right to receive your t-shirt.

**Citizens Bank Giving Portal**

It is important to log your volunteer hours to show the total impact all our colleagues make in our community. The Citizens Bank Giving Portal is a one-stop resource for colleagues to:

VIEW INFOGRAPHIC

Thursday Mar 22, 2015  
Get Help | Sitemap | Directories

Human Resources News & Events Department Sites About Us

Home > Community: Citizens Helping Citizens

## COMMUNITY: CITIZENS HELPING CITIZENS

Volunteerism strengthens our communities  
We make sure the homeless have somewhere to go. And that families have something to eat.

Volunteer Manage Money Fight Hunger Provide Shelter Strengthen Communities Matching Gifts

**We Develop Healthy Financial Habits**

In 2015, we are continuing our commitment to help our neighbors reach their financial goals. Here's how:

- More than \$1 million to nonprofit financial education programs in our local communities.
- Financial Literacy pages on the bank's.com sites to host financial financial tips, calculators and tools as well as highlight our community support.
- The Get Fin Lit Fit social media campaign helps consumers strengthen their understanding of their finances to ensure healthier finances and add muscle to their financial plans.
- Financial Tips throughout the year to help people bank better and smarter.

\* Please keep in mind our Social Media Guidelines

**Colleague Profiles**

- ▶ Jennifer Davenport
- ▶ Barbara Mealmaker
- ▶ Jack Pelles
- ▶ Dana Uistad
- ▶ Michael Zaldumbide

**Programs**

- ▶ Consumer Money Smart Training Materials
- ▶ Small Business Money Smart Training Materials

# September 2015

Dual site focus in September.

Friday Mar 23, 2018  
[Get Help](#) | [Sitemap](#) | [Directories](#)

Human Resources News & Events Department Sites About Us

Home > Community: Citizens Helping Citizens

## COMMUNITY: CITIZENS HELPING CITIZENS

Don't miss out on two great opportunities!

Colleague Giving Campaign 9/14 - 10/2  
Credo Champion for Community Award 9/21 - 10/14

[Credo Champion for Community Award](#) [Giving Campaign](#) [Volunteer](#) [Manage Money](#) [Fight Hunger](#) [Provide Shelter](#)

September 14 Through October 2

Many of you already contribute to nonprofits. Citizens Helping Citizens Colleague Giving campaign makes it easier. It is our annual payroll giving campaign that helps simplify what you are already doing. During this period, you can:

- **Enroll in automatic payroll deduction.** You pick the nonprofits and the amount you want to give to each. Your pledge will be deducted in 2016.
- **Support up to five nonprofits.** Organizations may include our bank's foundation and local United Ways, as well as your personal choices.
- **Double your eligible contributions with Matching Gifts.** Double your contribution by selecting matching gifts and Citizens will match contributions to eligible organizations dollar for dollar up to \$1,000. For more information click on [Matching Gifts](#).

What do you  
Colleague Gi  
 Autom  
contribu  
 Support  
foundati  
 Doublin  
Matchin  
 All of the

Powered By:

Friday Mar 23, 2018  
[Get Help](#) | [Sitemap](#) | [Directories](#)

Human Resources News & Events Department Sites About Us

Home > Community: Citizens Helping Citizens

## COMMUNITY: CITIZENS HELPING CITIZENS

Don't miss out on two great opportunities!

Colleague Giving Campaign 9/14 - 10/2  
Credo Champion for Community Award 9/21 - 10/14

[Credo Champion for Community Award](#) [Giving Campaign](#) [Volunteer](#) [Manage Money](#) [Fight Hunger](#) [Provide Shelter](#) [Strengthen Communities](#) [Matching Gifts](#)

### Credo Champion for Community Award

Part of the company's enhanced recognition program, the Credo Champion for Community Award recognizes colleagues who go above and beyond in their volunteer service to their

Award recipient community, the other colleague

Colleagues can One colleague accepted from

Awards will be

Award recipient

# CREDO

**Crucial recommendation:** keep tab content only for the period it is applicable, ie. keep hidden when campaigns, contests, voting periods are over

# Ongoing 2016 - 2018

In 2016 we worked on a mini-revamp to: (1) consolidate the 4 Corporate Giving areas under one Corporate Giving tab (2) add tabs for sponsorships, photos, local community overview, and news (3) combine Volunteer and Matching under one tab for Get Involved, (4) remove the [outdated] pictures on the top and replace with a graphic overview of community giving.



# Ongoing 2016 - 2018

In 2017 the Intranet was revamped to overhaul the top nav, and convert it to a mega nav, and remove the left nav. The Community site was moved to the new template, and updated during the year for many BAU updates.

The screenshot shows the Citizens Bank Intranet Community page. At the top, there is a navigation bar with the Citizens Bank logo, a search bar, and links for "Get Help", "Sitemap", and "Directories". Below this is a green mega navigation bar with categories: "OUR BUSINESS LINES", "OUR DEPARTMENTS", "HUMAN RESOURCES", "TECHNOLOGY", "HELP & QUICK LINKS", and "ABOUT US".

The main content area features a "Home" breadcrumb and a large section titled "COMMUNITY: CITIZENS HELPING CITIZENS" with the tagline "We understand that a good bank is at the heart of the community." and a "Learn More >>" link. To the right of this text is a circular infographic with the following data points: 14, 89, 725, 220, and 3.6. Below the infographic is a green button that says "Log your volunteer hours now - it's easy!".

Below the main content is a "Get Involved!" section with links for "Credo Champion for Community", "Corporate Giving", "Sponsorships", "Citizens in Action", "Support in Your Community", and "\*News\*".

The next section is titled "Volunteerism helps us all" and includes the text "We make a difference. Watch our Citizens Helping Citizens video to learn more." followed by a paragraph about the bank's commitment to community service. To the right of this text is a video player with a play button and a video title "cit·i·zens (noun) Inhabitants of a town or city that are committed to helping their community." Below the video player is a link: "Branch colleagues: view the video here >>".

At the bottom of the page, there are two links: "Giving Portal and Quarterly Credo Honor Roll" and "Volunteer Details: T-shirts, Logging Hours, Finding an Activity".

# Ongoing 2016 - 2018

At the start of **2018** both the Community and Digital teams decided it was time to conduct the next deep dive on the content and re-asses the usability factors for colleagues. Several key items were identified:

- Colleagues reported **difficulty finding information** on the page
  - Information was buried under accordions
  - Very few headings
  - Categories were unclear
- **Search wasn't helpful**; it would bring up one page in search results, but not give colleagues specifics (tab location) on where to find information
- Content was **duplicative** from material that was on the Giving Portal
- Some tabs were **far too wordy**, others had very minimal information
- Page template has a **dated look and feel**

# Overview - 2018

Once again we asked some new questions (and some old ones):

- What has changed since 2015/2016?
- Is there anything new that colleagues need to know?
- What is most important for colleagues?
- What are colleagues saying about the site?
- Does the site truly represent our core community values?
- Are there new goals (qualitative and quantitative)?
- How easy is this to update?
- What are the stats telling us?

Then, we repeated the prior process, and we...

- Met...and...
- Discussed...and...
- Gathered requirements...and...
- Established a comms plan with a timeline...and...

"There is nothing permanent except change." ~ *Heraclitus*

# Overview - 2018

We re-established the core priorities for the site. The site should...

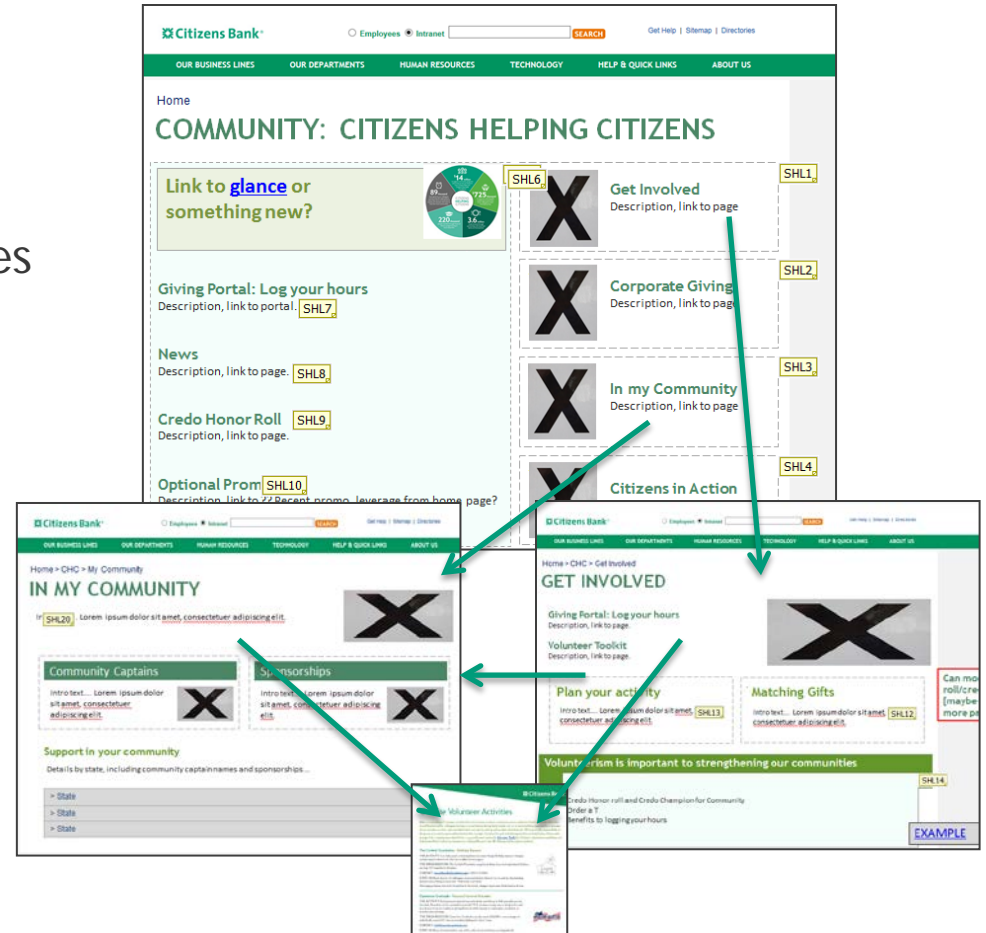
- be less text heavy, we don't need to repeat wording from other sites
- use larger pictures and fonts
- focus on: volunteering, recognition, corporate giving, local partnerships
- feature more news
- go back to the old format of a landing page with sub pages (what's old is new again!); this format allows for more flexibility and will provide more accurate stats to gauge which areas are of most to colleagues

**Style Guidelines:** the Digital team introduced a wireframe template, along with several new page designs, the new site would follow all the new standard guidelines

# Overview - 2018

Then we...

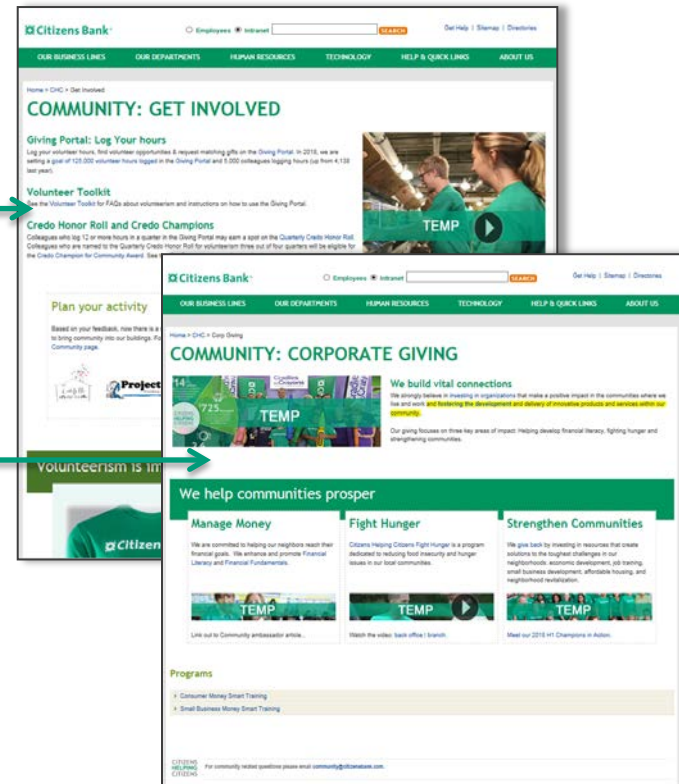
- created high fidelity wireframes
- developed user flows
- gathered pictures and content
- wrote new stories
- developed prototypes



**Style Guidelines:** the Digital team has made continual updates to the style sheet, the new site would follow all the new standard guidelines

# Site prototype -2018

Prior to site launch we established new site guidelines: the center area [to the left] will feature larger campaigns when they run. The home page feature will link directly here. When campaigns are not running this area will be updated at least bi-weekly with smaller stories that are not featured on the home page.



# Site launch- 2018

