



# Caisse de dépôt et placement du Québec (CDPQ)

## OVERVIEW

### COMPANY

CDPQ is a global investment group present in all major markets, with over 400 billion Canadian dollars in assets and offices in 10 countries.

**Headquarters:** Québec, Canada

**Company locations:** CDPQ has offices in 10 countries: Canada, US, Mexico, Brazil, UK, France, Singapore, China, Australia, and India

**Locations where people use the intranet:** Employees at all CDPQ locations use the intranet.

**Annual revenue:** N/A

### THE INTRANET

**Users:** 1,500 across all offices

**Mobile approach:** Responsive web design

**Technology platforms:** Akumina and Mindbreeze

### THE TEAM

Various employees and consultants contributed to the success of CDPQ's Digital Desktop during the past three years. Building an employee experience platform with an integrated user experience requires a collaborative effort. To name anyone specifically would downplay the high degree of collaboration required to deliver such a valuable product.

At a high level, the following teams were instrumental in the design and development of this platform: UX Design, Internal Communications, HR, and various content publishers.

## INTRANET TEAM



**Team members shown here** (front row, left to right): Annick Collette; Chrystel Black; (row 2, left to right) Jean-Pierre Cornillaut; Gabrielle Bernier-Bastien; Maxime Desrosiers; (row 3) Mathieu Boisvert; (row 4, left to right) Jean-René Lanthier, Marilyn Deshaies, Violaine Paquereau; (row 5, left to right) Anne-Marie Desloges; Line Lewandowsky; Mathieu Demers; (row 6, left to right) Frederic Turcotte, Nicholas Blanchette; (row 7 left to right) Jean-Sebastien Poulin, Frederic Mantha, Sophie Perreault; (back row, left to right) Juan Alchurrón; Patrick Robert; Denis Galiene.



**Additional team members shown here** (left to right): Mireille Laroche, Marilena Nappi, Jonathan Tolle, Isabelle Lamarre, Martine Lalonde.

## HIGHLIGHTS ABOUT THIS WINNER

Digital Desktop, the intranet from Caisse de dépôt et placement du Québec (CDPQ), provides a launchpad to essential tools, upcoming meetings, and recently accessed documents, making it the perfect entry point to the digital workplace. The intranet is an informational hub, where employees at the investment company can find consolidated news, partner-relevant information, company announcements, and workplace notifications, all in one place. This attractive and simple website has been purposefully designed with employees' needs in mind.

- **Attractive and minimalistic design:** CDPQ's intranet has a pared-down, simple but elegant visual design, which supports the intranet's goal of reducing noise and supporting employees in finding helpful content to do their jobs efficiently. Plenty of white space separates content, making it easy to read, digest, and scan. Although the intranet utilizes a flat design, plenty of affordances such as carets, buttons, recognizable icons, and colored link text provide ample cues to users on how to interact with the design.
- **Important alerts:** Employees are notified about updates in many third-party applications such as DocuSign, Concur, Workday, and the company's CRM, thanks to API integrations. The team utilizes an API manager to handle the interactions between Digital Desktop and the third-party solutions used at CDPQ. Alerts can be found from the homepage of Digital Desktop and help to reduce messaging noise and streamline communication of important updates.
- **Customizable homepage:** The homepage consists of a collection of web components that a user can remove, add, or order so the presence and hierarchy of content meets employees' needs when launching Digital Desktop. Certain web components are personalized to the employee. For example, one web component provides an aggregated list of investment-related information, which is filtered to provide the most relevant investment information based on the employee's role.
- **Quick links:** Users can save their favorite apps and SharePoint sites and find them from the utility navigation, making the homepage a useful starting point for the workday.



- **Strong navigation:** Digital Desktop utilizes a mega menu design, which is carefully organized and labeled. Categories are mutually exclusive, and category and link labels provide high information scent due to their focus on users' needs and tasks. The team performed card sorting to land on a usable navigation.
- **Powerful federated search:** Digital Desktop's search engine searches not only content published on the intranet but also the people directory, knowledge publication repository, and the CRM to provide helpful search results. The search engine results page provides a helpful factsheet feature, grouping information from these different sources. For example, when searching for a company, the factsheet presents internal and external contacts, the most recent deal information, and any relevant documents. This ensures Digital Desktop's search is the single source of truth for the latest information.

## BACKGROUND

Several factors contributed to CDPQ undertaking this project at this time, primarily:

- **SharePoint migration:** In 2019, Microsoft notified customers that SharePoint 2010 (on which the company's old intranet was based) would no longer be maintained. This prompted CDPQ to migrate to SharePoint Online for its intranet services. The company used this as an opportunity to upgrade CDPQ's intranet overall, leveraging modern capabilities in employee experience platforms, such as Akumina, which are compatible with the company's Microsoft technology environment.
- **New design and development approach:** During the same year, CDPQ hired its first UX designer and decided that the intranet should be redesigned using a human-centered design approach.

## Goals

The overall vision for the intranet was articulated as "Offer each employee a simple, consistent and contextual environment so that everyone can benefit from the full potential of CDPQ's digital workplace." From this vision statement, the team further identified goals, functional objectives, and a set of experience principles the project would be guided by.

These include:

### Goals

- Maximize adoption and use of the company's technological tools
- Facilitate work and improve organizational efficiency
- Improve access to information and to the company's collective intelligence
- Make more informed decisions

## Functional Objectives

Because the Digital Desktop would be the preferred point of entry into CDPQ's digital ecosystem, it needed to:

- Provide quick, effective access to CDPQ know-how
- Incorporate more relevant information and allow users to access business applications
- Be tailored to each employee by job, role, or location
- Be personalized and customizable

## Experience Principles

The Digital Desktop was designed so that it would:

- Place the employee at the center of the design process
- Reduce employee cognitive load
- Democratize technology
- Be a leader in the digital workplace
- Create a satisfying digital environment

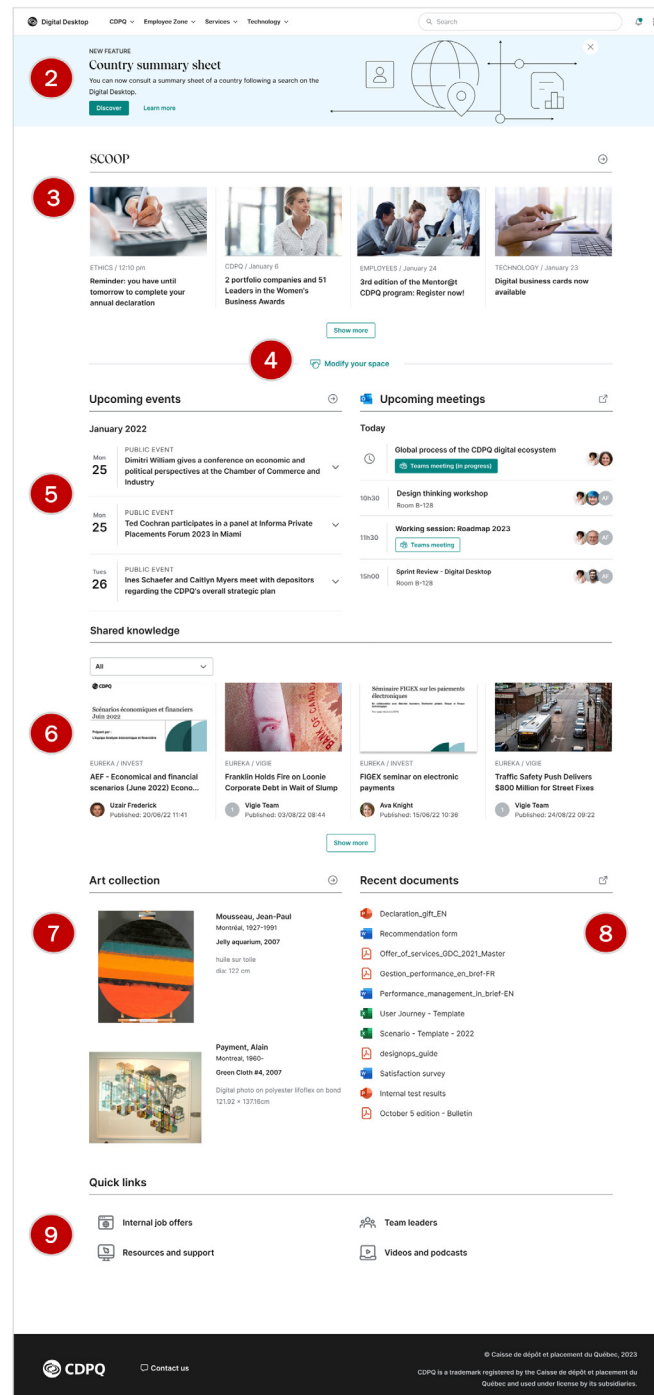
## Challenges

CDPQ's intranet team rose to the occasion and met challenging project constraints head-on, including:

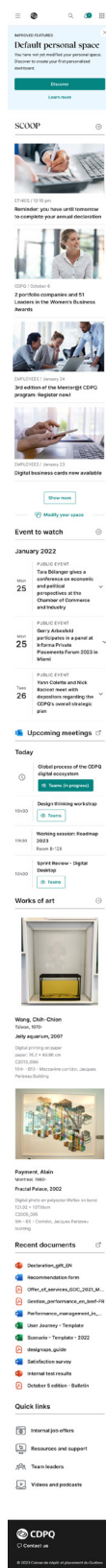
- **A team in flux formed when the world was in flux.** A team consisting of mostly new members had to quickly learn to work together and develop their knowledge of the technology (Akumina, Microsoft, etc.) as well as adopt a new practice (human-centered design) while the organization was making the transition to Agile methods. To add to this challenge, development began on March 11, 2020. Two days into the first sprint, the team went into remote-only work mode, which required quick adaptation from all delivery team members.
- **Technology constraints.** CDPQ strives to achieve strong and scalable foundations, so for the initial requirements, that meant having an API manager to handle all interactions between the Digital Desktop and third-party solutions (APIs).
- **Multiple teams require tight alignment.** The ambitious scope of the initial version required multiple teams to work on various components simultaneously, increasing the importance of having closely aligned work streams.
- **A hard deadline for launch.** The end of support for the old intranet meant CDPQ had a hard deadline by which to complete and launch the first version of the Digital Desktop.

## DESIGN REVIEW

## Homepage



**Image 12. CDPQ Intranet Homepage on Desktop.** The intranet homepage highlights important news and presents a customizable dashboard of employee tools and tasks. *CDPQ\_01\_home\_live.png*



**Image 13. CDPQ Intranet Homepage on Mobile.** The intranet homepage on mobile prioritizes recent company news. *CDPQ\_02\_home\_live.png*

## Homepage Highlights

Digital Desktop's homepage is clean, uncluttered, customizable, and attractive. Employees use the intranet homepage like a desktop — it's the first thing they use to start their workday, and the homepage keeps employees in the loop on important company news and events through the top news section.

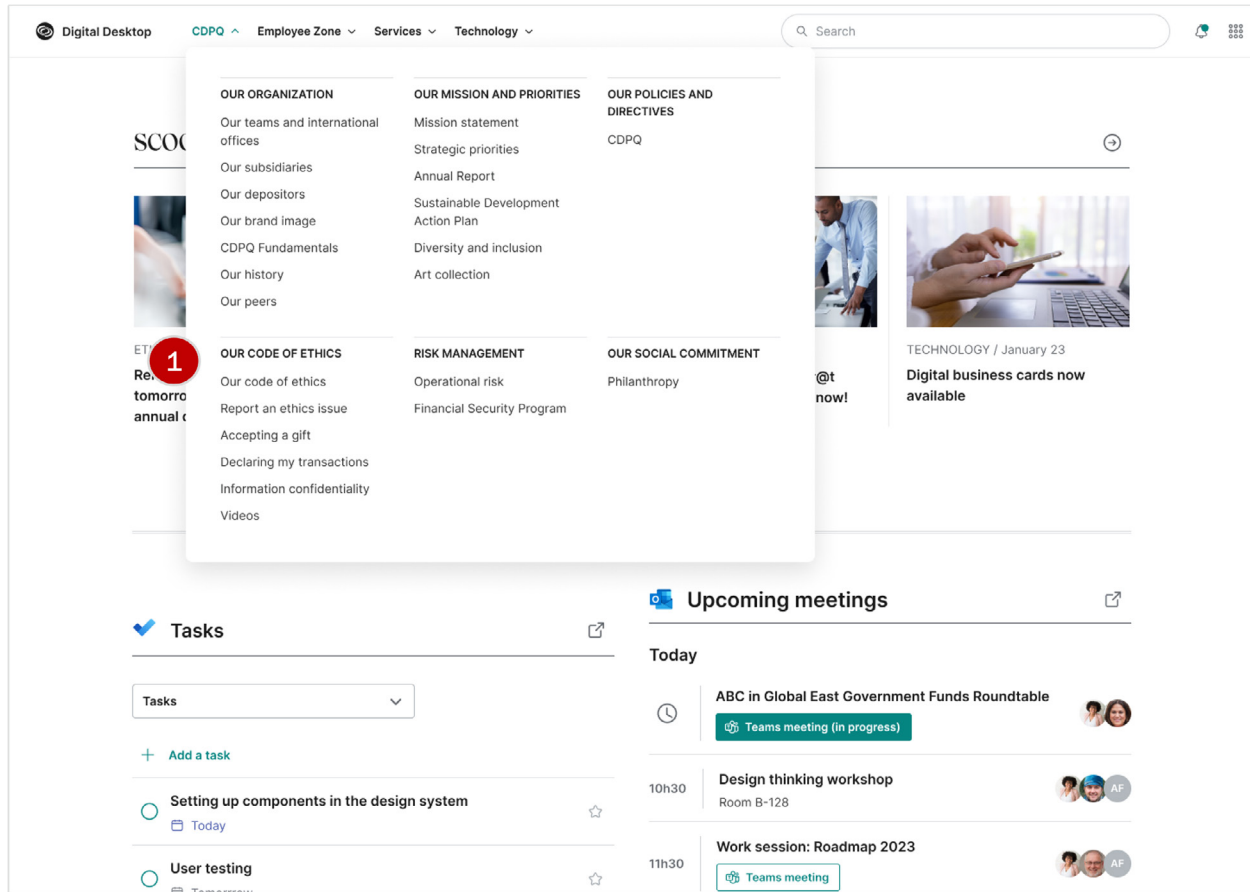
Below the news section of the page, employees can customize which components appear. Many helpful components are available to choose from and can be ordered on the page. This ensures the homepage reflects the most important tasks and information employees need to start their day. The page makes use of helpful white space, which results in a page which doesn't feel cluttered, even though a lot of useful information is presented.

1. **Utility navigation:** The notification bell highlights important updates in third-party applications (such as Workday or DocuSign). This is made possible through Digital Desktop's integration with several third-party APIs. From the bento icon, employees can find all company applications and can see their favorited applications.
2. **New feature banner:** Employees can be notified about new features in Digital Desktop through an attractive and prominent blue banner that contrasts the simplicity and cleanliness of the page. Clear calls to action are presented in the banner. This feature helps employees learn about new capabilities in an ever-evolving Digital Desktop.
3. **Scoop news segment:** Important CDPQ news and announcements are featured in the scoop section. A *show more* button allows employees to progressively see more news on the same page. Employees can navigate to the *Articles* page to search and find more company news.
4. **Customizable section:** A call to action (*Modify your space*) highlights content that can be customized. Clicking the link provides a modal dialogue where employees can select which content items to show and in which order.
5. **Upcoming events and meetings:** Employees can find upcoming events featured on the homepage. They can also see and join any upcoming meetings they have that day, as well as see who the meeting is with.
6. **Featured knowledge articles:** Recent knowledge articles published on CDPQ's investment knowledge-sharing platform, Eureka, are showcased from the homepage, thanks to an API integration. This ensures content is more visible and has since increased readership by 28%. The content presented here is also personalized to the user's role.
7. **Art collection:** CDPQ has acquired over 300 museum-quality contemporary pieces of art produced by Québec artists. These artworks are displayed throughout CDPQ's offices. To help socialize these artworks and encourage participation in cultural life, a rotating collection of this art is available digitally from Digital Desktop's homepage. The pieces showcased change upon each new login or page refresh.

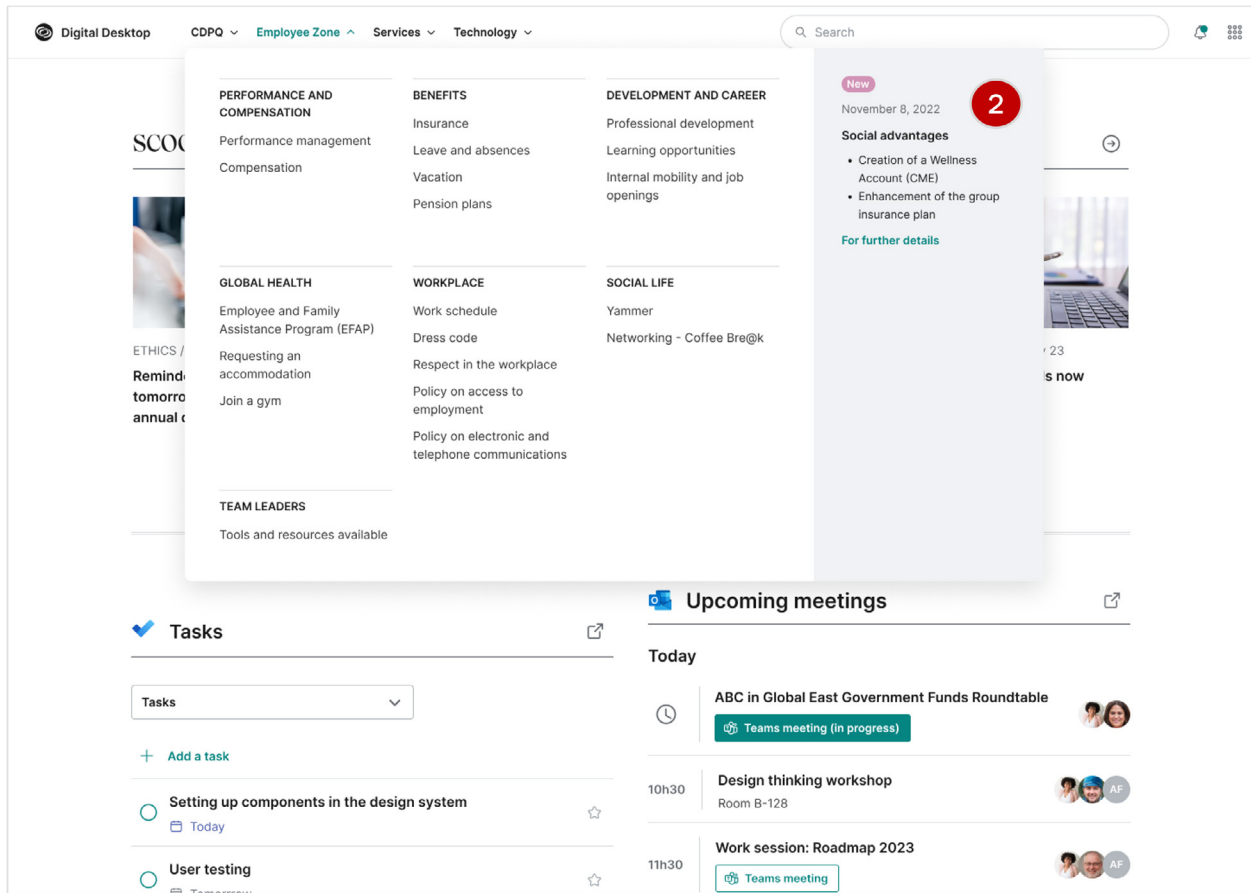


8. **Recent documents:** Documents employees have opened or worked on recently are presented on the homepage. Employees can navigate from here to SharePoint. This ensures employees can quickly pick up work from where they left off.
9. **Helpful links:** Popular links to helpful resources can be found at the bottom of the page for quick access.

## Main Navigation



**Image 14. CDPQ Main Navigation Company Category.** The open navigation menu for the company category shows six distinct categories of links.  
*CDPQ\_03\_menu\_live.png*



**Image 15. CDPQ Main Navigation Employee Category.** The open navigation for the *Employee Zone* category shows seven distinct categories and an additional area for pinned new content. *CDPQ\_04\_menu\_live.png*

## Main Navigation Highlights

The main navigation utilizes a standard horizontal navigation bar with four categories. Each category indicates the presence of a dropdown menu through a caret. A mega menu was chosen to avoid the need for many levels in the navigation and section overview pages, supporting users in finding content more quickly and with fewer clicks.

The mega menu is well-organized, with scannable headings and enough white space to support scanning across each category. The team should be commended for their design of link labels that have strong information scent. Link labels are written from the point of a user's task or query rather than using workplace branded terms or jargon. Any acronyms are spelled in full. This ensures employees can find the information they need successfully and clearly communicates to users what content they can find through Digital Desktop.

1. **Scannable menu sections:** Categories of links are well separated and aligned, making it easy to scan across categories. Light-gray category dividers help to separate categories from each other without adding too much visual clutter. While the mega menu is quite large, each category does not have too many links.
2. **Highlighted new content:** New important content within each of the categories is surfaced within the mega menu in an additional gray column on the right. The pinned links sit on a gray background, making it visually distinct. New promoted items are also communicated by the date stamp and pink *new* badge.

## Quick Links

The screenshot displays the CDPQ Intranet interface. At the top, there is a navigation bar with 'Digital Desktop', 'CDPQ', 'Employee Zone', 'Services', and 'Technology'. A search bar is located on the right. The main content area is divided into several sections:

- SCOOP**: A news section with three articles. The first article is titled 'Reminder: you have until tomorrow to complete your annual declaration'. The second article is titled '2 portfolio companies and 51 Leaders in the Women's Business Awards'. The third article is titled 'EMPLOYEES, 3rd edition CDPQ prog'. A 'Show more' button is located below the articles.
- Tasks**: A section with a 'Tasks' dropdown menu and an 'Add a task' button. Below this, there are two task items: 'Setting up components in the design system' (due today) and 'User testing' (due tomorrow).
- Quick links**: A menu on the right side of the page. It has three tabs: 'Tools', 'Followed sites', and 'Documents'. The 'Tools' tab is selected and highlighted with a red circle '1'. A dropdown menu is open under 'Tools', showing 'Favourites', 'Administration', 'Investment', and 'Services'. The 'Tools' dropdown is highlighted with a red circle '2'. Below the dropdown, there is a list of quick links: 'Consolidated directory', 'Directory of services', 'Consur', 'DocuSign', 'Annual declaration', 'Eureka', 'Visitors management', 'Klaxoon', 'Business cards', 'Business service application form', 'Document Translator', 'Gift and Entertainment Statement', 'Forms', 'Hotjar', and 'LexiCaisse'. The 'Hotjar' link is highlighted with a red circle '3'.
- Today**: A section with a clock icon and a list of events for today, including '10h30' and '11h30'.

**Image 16. CDPQ Intranet Quick Links, Tools.** The *Quick links* menu provides the option to toggle between favorited tools, sites, and documents.

*CDPQ\_05\_quicklinks\_live.png*



Digital Desktop CDPQ Employee Zone Services Technology

Search

## SCOOP

ETHICS / 12:10 pm  
Reminder: you have until tomorrow to complete your annual declaration

CDPQ / January 6  
2 portfolio companies and 51 Leaders in the Women's Business Awards

EMPLOYEES /  
3rd edition  
CDPQ prog

Show more

Modify your space

### Tasks

Tasks

+ Add a task

Setting up components in the design system  
Today

User testing  
Tomorrow

### Quick links

Tools Followed sites Documents

- Declaration\_gift\_EN
- Recommendation form **4**
- Offer\_of\_services\_GDC\_2021\_Master
- Gestion\_performance\_en\_bref-FR
- Performance\_management\_in\_brief-EN
- User Journey - Template
- Scenario - Template - 2022
- designops\_guide
- Satisfaction survey
- Internal test results
- October 5 edition - Bulletin

All documents

Upc

Today

10h30

11h30

**Image 17. CDPQ Intranet Quick Links, Documents.** Employees can find their recent documents in the document view of the *Quick links* menu.  
*CDPQ\_06\_quicklinks\_live.png*

## Quick Links Highlights

Employees can find their favorited tools and sites, as well as recently accessed documents, from the bento icon in the utility navigation. When the menu is opened, employees see their favorited tools, providing quick access. Employees can find the complete tool category from within the menu and add more to their favorites.

1. **Toggle between content types:** Opening up the *Quick links* menu shows favorited tools by default. However, users can toggle between other types of content, like their favorited SharePoint sites or recently accessed documents.
2. **Filter by type of tool:** Employees can use the dropdown filter to see all tools, subsets of tools by category, or the tools they have favorited.
3. **Tool icons:** A tool icon accompanies the tool name, where available. This aids in recognition. Employees can select the star icon to favorite a tool so that it appears in the favorited view.
4. **Document icons:** Recently accessed documents within the Office365 ecosystem can be seen from the *Documents* link within the *Quick links* menu, helping users return quickly to a document they may have been using in their work.

## Workplace Notifications

The screenshot displays the CDPQ Intranet Digital Desktop interface. At the top, there is a navigation bar with the following items: Digital Desktop, CDPQ, Employee Zone, Services, and Technology. A search bar is located on the right side of the navigation bar. The main content area is divided into several sections:

- SCOOP**: A section containing three news cards. The first card is titled "ETHICS / 12:10 pm" and contains the text "Reminder: you have until tomorrow to complete your annual declaration". The second card is titled "CDPQ / January 6" and contains the text "2 portfolio companies and 51 Leaders in the Women's Business Awards". The third card is titled "EMPLOYEES / ..." and contains the text "3rd edition of CDPQ progra".
- Tasks**: A section with a blue checkmark icon and the text "Tasks". Below it is a dropdown menu with the text "Tasks".
- Alerts**: A section with a close button (X) in the top right corner. It contains a list of notifications:
  - DocuSign**: A notification with a red circle containing the number "1". It includes the text "Complete with DocuSign : DocuSign #340865" and "From : Simon Talon 1 day ago".
  - MAX**: A notification with a red circle containing the number "0". It includes the text "Updated every 15 minutes".
  - Workday**: A notification with a red circle containing the number "2". It includes the text "Updated every 15 minutes".

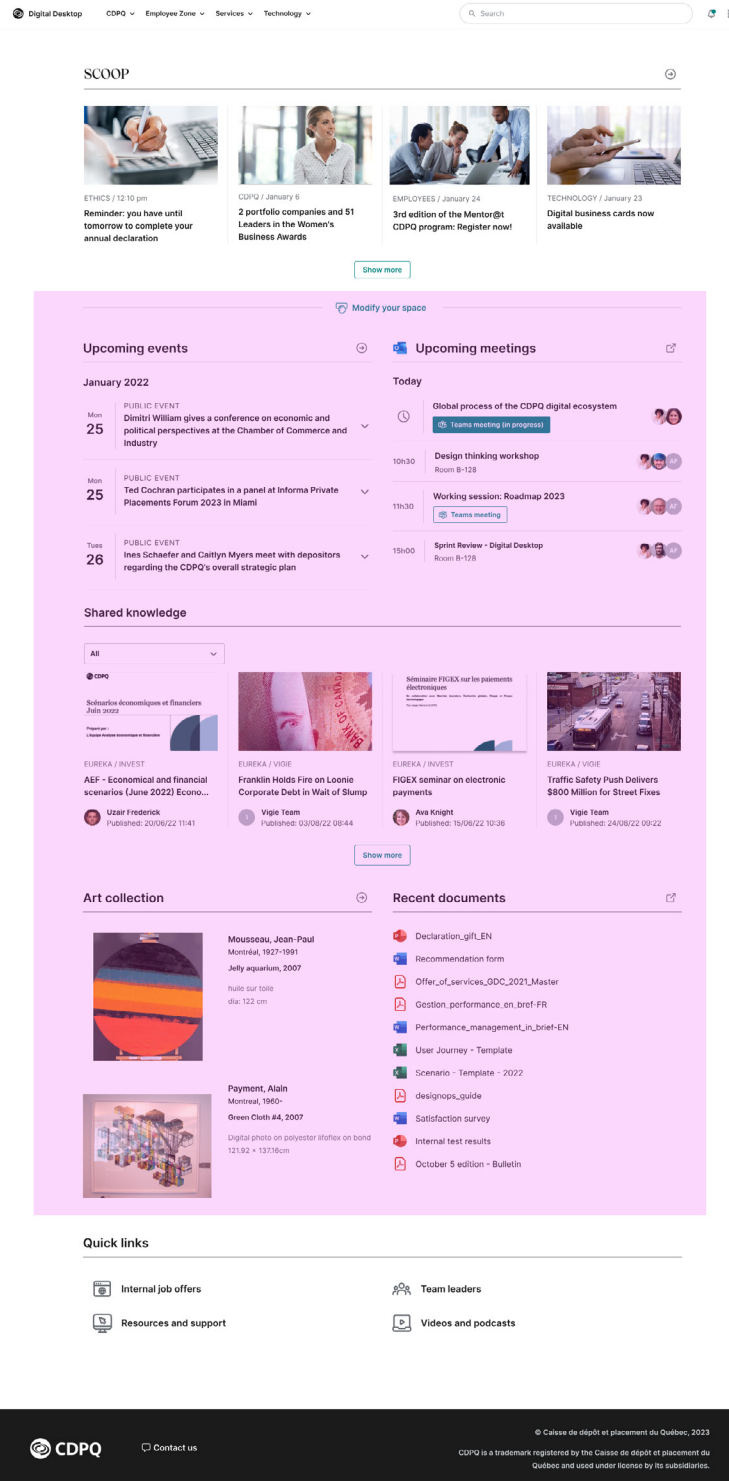
**Image 18. CDPQ Intranet Digital Desktop Notifications Menu.** Employees receive notifications of tasks awaiting their action in the *Alerts* menu found under the notification bell in the utility navigation. *CDPQ\_07\_alerts\_live.png*

## Workplace Notifications Highlights

On Digital Desktop, employees are notified anytime a new workplace task is ready to action through the *Alerts* feature found from the notification bell in the utility navigation. This is made possible through API integrations between Digital Desktop and important third-party solutions used at CDPQ. Tasks that require timely resolution, such as providing purchase approvals or signing an important contract, are surfaced through Digital Desktop and can be quickly actioned. This feature helps to create an efficient workplace.

1. **Exposed task detail:** Tasks appear at the top of the *Alerts* menu with a blue callout icon to signify the number of tasks requiring attention. The tool name and logo appear in the list to highlight where the action needs completing; in this example, a document needs signing in DocuSign. In addition to showing the number of tasks and the tool, the task itself is surfaced. In the example shown, a document from Simon Talon needs signing.
2. **Update transparency:** Employees can see how frequently the *Alerts* menu is updated. Since the *Alerts* menu is not updated in real time, this information is important.

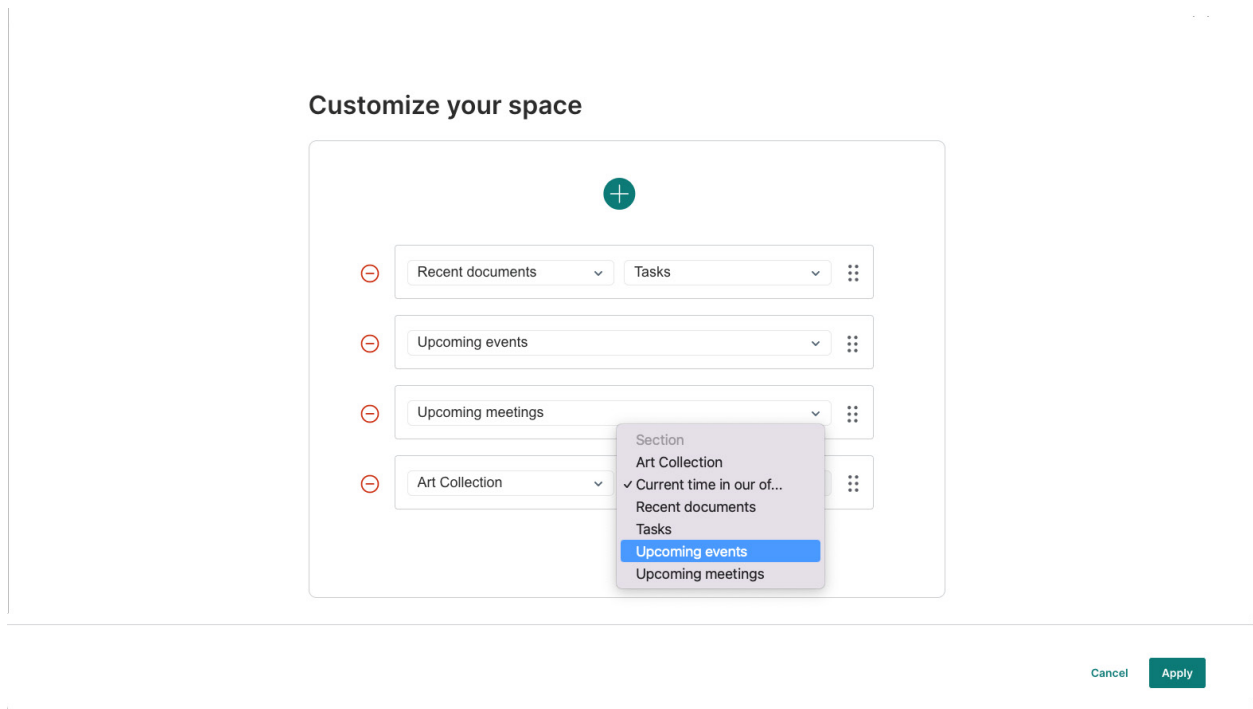
# Homepage Customization



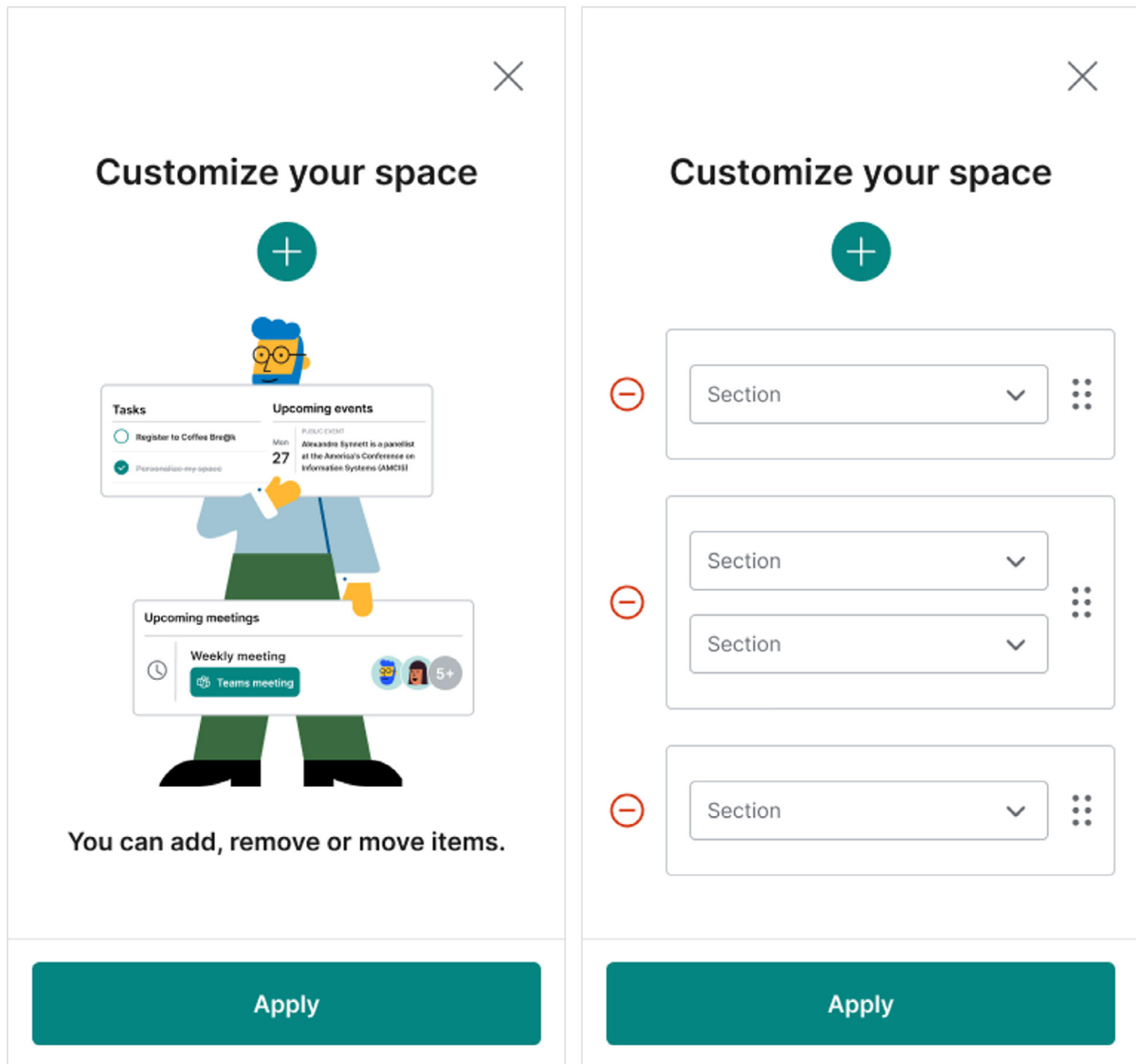
**Image 19. CDPQ Homepage Customization Area.** Employees can customize what content is shown, and in what order, on the intranet homepage.

*CDPQ\_08\_personalizedhome\_live.png*





**Image 20. CDPQ Homepage Customization Widget on Desktop.** Employees are presented with a dialogue when choosing to customize their homepage, allowing them to select which component they'd like to include and providing options to click and drag to reorder. *CDPQ\_09\_personalizedhome\_live.png*



**Image 21. CDPQ Homepage Customization Screens on Mobile.**

Employees can customize the homepage of Digital Desktop on mobile.

*CDPQ\_10a\_personalizedhome\_live.png (left),*

*CDPQ\_10b\_personalizedhome\_live.png (right)*

## Homepage Customization Highlights

Employees can make the homepage of Digital Desktop their own from their desktop and mobile device. Customizable widgets sit below the news section of the homepage and allow employees to show or hide components that are useful to them. Selecting the option to customize the homepage provides an overlay with dropdowns that can be reordered. Components employees can choose from include:

- Upcoming events
- Today's meetings
- Compiled investment information from CDPQ's knowledge-sharing platform
- Recently opened documents
- Art collection
- Task list

## Search

**1** Search bar and navigation tabs: Digital Desktop, CDPQ, Employee Zone, Services, Technology.

**2** ABC Corporation profile card: ABC Corporation creates fintech solutions for store owners. They offer exceptional payment help and support services, as well as custom solutions ...

**3** Colleagues (18): Mayer, John (Vice-president, Technological risks and Chief of security), Gomez, Manuero (Intern), Germayer, Maria (Senior Director, Partnership development).

**Documents (418)**

- ABC courts the aeronautical field with a brand new solution
- Partners Special Evening
- Presentation ABC series P Investment - Update.pdf

**Digital desktop (8)**

- CDPQ invests in firm ABC
- ABC investment project up...
- Growth allies for ABC Tech

**Knowledge base (15)**

- Fintech Dashboard
- Economical and financial watch (01 2023)
- Solution Hamofy - Review (01 2023)

**Partners (48)**

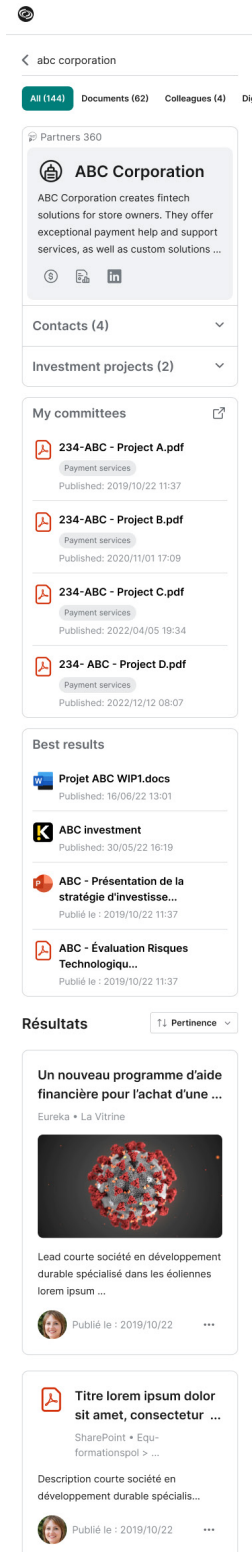
- GHI Project - ABC
- Josianne Tremblay
- Company ABC

**Datasets (122)**

- Bloomberg Risk Model
- CDPQ Structure Data
- ABC Portfolio Data Portrait

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**Image 22. CDPQ Intranet Search Results Page on Desktop.** The search engine results page on Digital Desktop provides relevant content organized by content type. *CDPQ\_11\_search\_live.png*



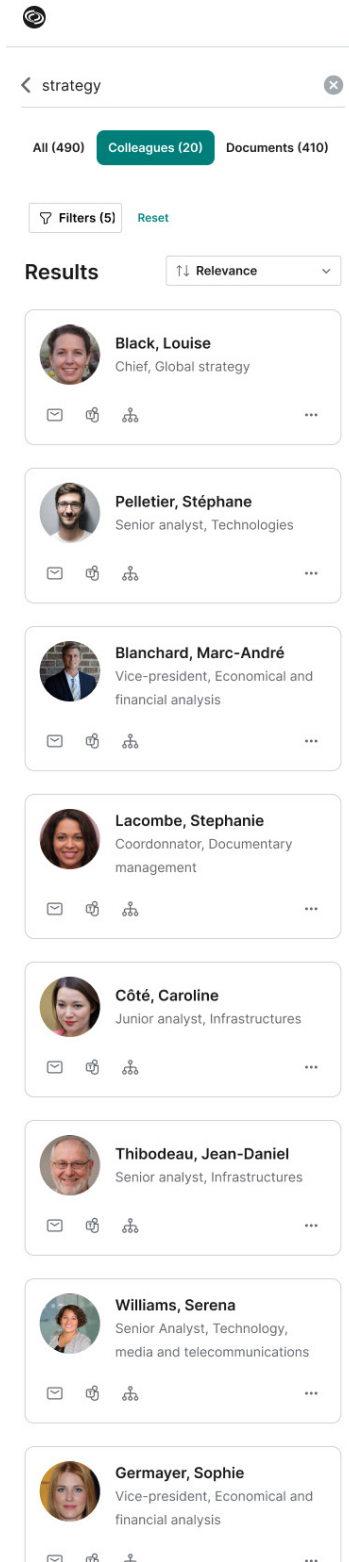
**Image 23. CDPQ Intranet Search Results Page on Mobile.** The search engine results page is adapted for mobile. Search results are stacked by content type.  
 CDPQ\_12\_search\_live.png



The screenshot displays the CDPQ Intranet People Search interface. At the top, there is a navigation bar with 'Digital Desktop', 'CDPQ', 'Employee Zone', 'Services', and 'Technology'. A search bar contains the term 'aerospacial'. Below the search bar, there are filters for 'All (490)', 'Colleagues (20)', 'Documents (410)', 'Digital desktop (8)', 'Knowledge base (12)', 'Partners (28)', and 'Datasets (12)'. A filter bar includes 'Organization', 'Team', and 'City' dropdowns, along with 'Reset' and 'Consolidated directory' options. A 'Relevance' dropdown is also present. The results are shown in a grid of eight employee cards, each with a profile picture, name, title, and contact icons (email, phone, and a group icon). A red circle with the number '6' is overlaid on the first result card.

Name	Title
Black, Louise	Chief, Global strategy
Pelletier, Stéphane	Senior analyst, Technologies
Blanchard, Marc-André	Vice-president, Economical and financial analysis
Lacombe, Stephanie	Coordonnator, Documentary management
Côté, Caroline	Junior analyst, Infrastructures
Thibodeau, Jean-Daniel	Senior analyst, Infrastructures
Williams, Serena	Senior Analyst, Technology, media and telecommunications
Germayer, Sophie	Vice-president, Economical and financial analysis

**Image 24. CDPQ Intranet People Search Results on Desktop.** Employees can search by person and filter the results by location, team, and organization. *CDPQ\_13\_search\_live.png*



**Image 25. CDPQ Intranet People Search Results on Mobile.** Employee search on mobile presents results by relevancy. Users can apply filters, which are collapsed in a dropdown, to narrow their search. *CDPQ\_14\_search\_live.png*

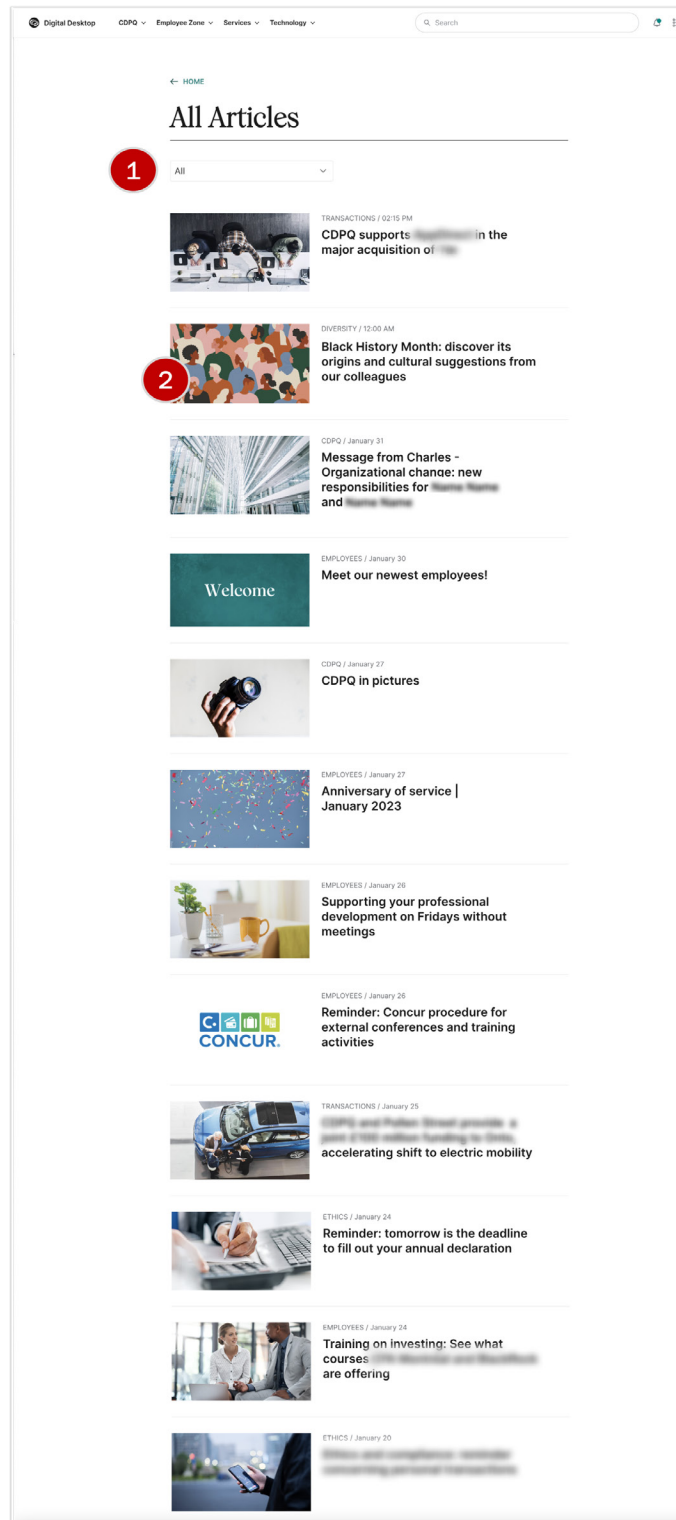
## Search Highlights

Digital Desktop has a federated search pulling results from the people directory, the CRM, and the knowledge article system Eureka (Bloomfire software), among others. When employees search for a client organization, they find a helpful factsheet, which presents internal and external contacts, the most recent deal information, and any relevant documents. This ensures employees can find the most important information in one place without the need to log in to various tools, saving much time.

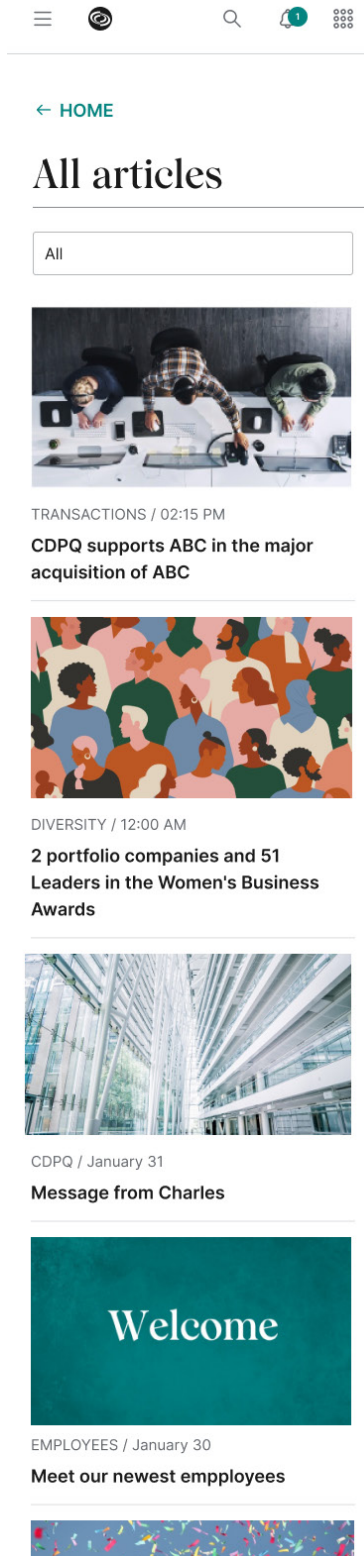
The search results page is organized by content type, and users can filter to see results from one content category.

1. **Content type filters:** Employees can filter the search results by people, documents, intranet content, client organizations, and data sets. The number of search results appears next to each filter to assist users in finding the content they're seeking.
2. **Company factsheet:** When employees search for a client organization, they are presented with a factsheet for the company at the top of the search results page. The factsheet displays what the organization does, who the company contacts are, and which CDPQ employees own the relationship with the client organization. Any in-progress projects or documents are also surfaced. Information from multiple systems, including the CRM, is sourced to provide this comprehensive overview. Links to applications where further information can be found are available straight from the factsheet. Information within the factsheet is easy to consume through sensible headings and clearly delineated content sections.
3. **Content organized by content type:** Instead of presenting search results in a long list, the search results page is organized by category, making search results easier to parse. Users can find more results in one category by selecting the arrow next to each category title, in addition to the filters at the top of the search engine results page.
4. **People filters:** When employees choose to filter the search results by *Colleagues*, relevant filters appear with the option to narrow down the search results by team, country, and organization.
5. **Link to people directory:** Employees can quickly leave the search results page for the people directory from the link available on the search results page. The link icon communicates that users will be leaving the intranet.
6. **People tiles with quick access information:** Important employee information is presented in each tile, such as the employee's name, title, profile photo, and links to access the org chart or to contact the employee via Microsoft Teams or email.

# Articles



**Image 26. CDPQ Intranet Articles Page on Desktop.** The news hub presents all articles in reverse chronological order in a list format. *CDPQ\_15\_scoop\_live.png*



**Image 27. CDPQ Intranet Articles Page on Mobile.** The news hub on mobile presents all articles in reverse chronological order in a list format.  
*CDPQ\_16\_home\_live.png*



Digital Desktop CDPQ Employee Zone Services Technology Search

← HOME

3

## Black History Month: discover its origins and cultural suggestions from our colleagues

Published on February 1, 2023

February 1 marks the start of Black History Month, an occasion to celebrate the different Black communities, to learn and become aware of their essential contribution to our societies' vitality and prosperity.

To celebrate the start of the month, we asked colleagues to share their cultural suggestions. Here are some of them:

### Books

- [Born a Crime: Stories from a South African Childhood](#) (Penguin Random House Canada, 2019), in which the actor, comedian and host Trevor Noah speaks about growing up in South Africa.
- [Homegoing](#) (Penguin Random House Canada, 2017), by Yaa Gyasi, a novel about two Ghanaian sisters who are separated and the history of their descendants from the 18<sup>th</sup> century to the present day.
- All works by [Dany Laferrière](#), a Canadian of Haitian descent writer, director and member of the Académie française.
- [Consumed: On Colonialism, Climate Change, Consumerism and the Need for Collective Change](#) (Grand Central Publishing, 2021) by Aja Barber looks at injustices, particularly social and climate, through the lens of consumer culture.
- [The Highlighter](#), a reading community focused on articles about race, education and culture offering a newsletter and discussions with the authors of the articles.
- The works of Carla A. Harris, an executive with more than 30 years of experience in various sectors, including technology, media, and health care. Her book [Strategize to win](#) (Avery Publishing Group, 2014) presents itself a resource for taking control of your career.

### Films

- [The Woman King](#), 2022, directed by Gina Prince-Bythewood, tells the story of a group of female warriors from the 18<sup>th</sup> century who protect the West African kingdom of Dahomey.
- The ["Black Communities in Canada"](#) collection from the National Film Board includes 20 films by Black filmmakers and allies of the Black communities in Canada.

### Podcasts

- In [Aujourd'hui l'histoire](#), host Maxime Coutié and his guests discuss a fact, an event, or an idea that has marked history. Among the episodes (in French only):
  - [Frederick Douglass and his fight to abolish slavery](#), with Mylène Desautels, a history teacher at Cégep Lionel-Groulx.
- [Strong and Free](#), a six-part series of 20-minute episodes coproduced with Historica Canada tracing the history of the earliest Black settlers to recently arrived Canadians by presenting some of the crucial stories.

### Other suggestions to deepen your knowledge

Black History Month is from February 1 to 28. To learn more about the official programming, head to the [Black History Month](#) website.

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**Image 28. CDPQ Intranet Article on Desktop.** The article page template promotes readability with adequate line spacing, easy-to-read fonts, and accessible line lengths of 80 characters and under. *CDPQ\_17\_scoop\_live.png*

## Articles Highlights

Company news articles are presented in reverse chronological order in a list format on the *Articles* landing page, making scanning easy.

The article page template is attractive in its simplicity. Accessible fonts and line lengths and adequate line spacing on this page promote readership. In addition, content authors follow best practices for writing content to assist users in scanning, such as using bulleted lists, headings, and informative inline link text.

1. **Simple filter option:** Instead of offering many filters, which users rarely use, one filter option is available to sort news by popular tags that are assigned by content authors.
2. **Article cards:** Each news item is accompanied by a date stamp, tag, and relevant image.
3. **Content tags:** News items are tagged by the content author, helping them to be found in search results.

## Employee Profile

Bureau numérique

**Lynda Thibault**  
Portfolio Manager, Global Value stocks

1

Profile
Organizational Chart

### Informations

<p>City <b>Montreal</b></p> <p>Office <b>B5.105</b></p> <p>Team <b>Active Management</b></p> <p>Phone <b>+1 (514) 4444444</b></p> <p>Cellphone <b>+1 (438) 8888888</b></p>	<p>Building <b>Jacques-Parizeau Building</b></p> <p>Organization <b>Caisse de dépôt et placement du Québec</b></p> <p>Cost center <b>1234</b></p> <p>Fax <b>+1 (514) 5555555</b></p> <p>Email <b>lthibault@cdpq.com</b></p>
--	---

### Contact person 2

**Marie-Danielle Whyte**  
Administrative assistant


### Manager

**Micheline Diaz**  
Senior Portfolio Manager, Global Value stocks


Contactez-nous




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**Image 29. CDPQ Intranet Employee Profile Page on Desktop.** The employee profile on desktop provides the employee's contact information, a link to the org chart, and details of the employee's manager. *CDPQ\_18\_employeprofile\_live.png*



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**Lynda Thibault**  
Portfolio Manager, Global Value stocks

[Profile](#) [Organizational Chart](#)

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**Informations**

Ville  
**Montréal**

Building  
**Jacques-Parizeau Building**

Office  
**B5.105**

Organization  
**Caisse de dépôt et placement du Québec**

Team  
**Active Management**

Cost center  
**1234**

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**+1 (514) 4444444**


Fax  
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Cellphone  
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Email  
**lthibault@cdpq.com**


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**Contact person**



  
**Marie-Danielle Whyte**  
Administrative assistant

---

**Manager**

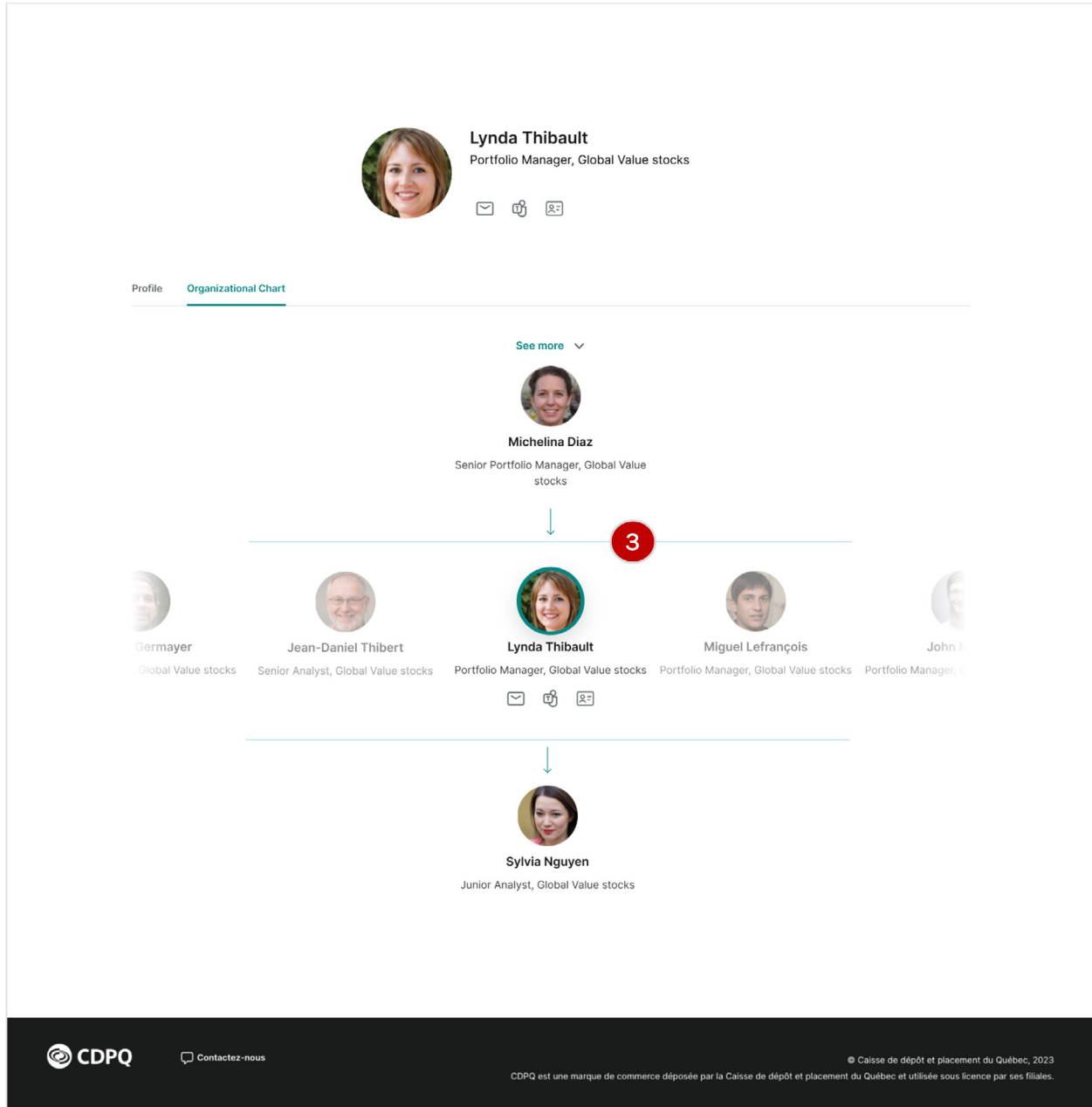
  
**Michelina Diaz**  
Senior Portfolio Manager, Global Value stocks

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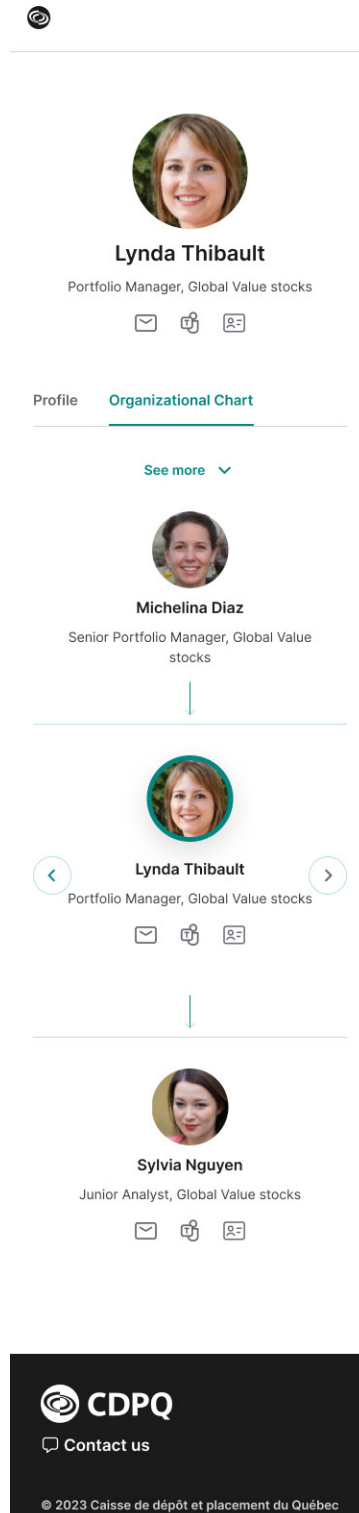
 **CDPQ**  
 **Contact us**

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**Image 30. CDPQ Intranet Employee Profile Page on Mobile.** The employee profile on mobile provides the same information as on desktop, but information is organized by priority. *CDPQ\_19\_employeprofile\_live.png*



**Image 31. CDPQ Intranet Employee Org Chart on Desktop.** The org chart on desktop shows the names and pictures of employees above, below, and at the same management tier as the employee. *CDPQ\_20\_employeprofile\_live.png*



**Image 32. CDPQ Intranet Employee Org Chart on Mobile.** The org chart on mobile shows an employee’s manager and anyone they manage (if applicable). Users can tap the arrows to see further people in the organizational structure. *CDPQ\_21\_employeprofile\_live.png*

## Employee Profile Highlights

The employee profile is simple and effective and designed appropriately for every screen size. Employees can find a colleague's contact information, which is sourced from Workday. From the employee profile, a user can locate a simple org chart to learn where a colleague sits in the organizational structure.

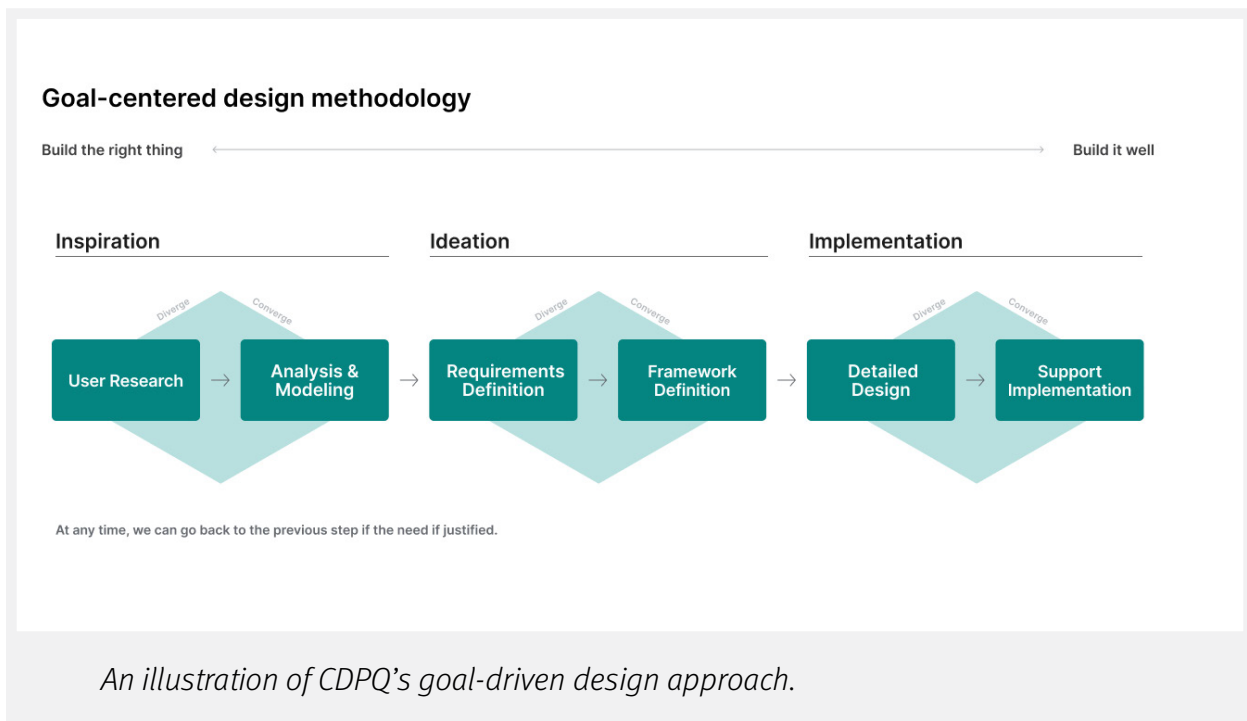
1. **Toggle between profile and org chart:** Users can quickly toggle between the employee's profile information and the org chart.
2. **Contact person:** On the employee profile, the *Manager* section highlights who the employee reports to in the org chart. A photo accompanies the manager's name and title to aid in recognition. If an employee has an admin assistant, a contact person is highlighted from the profile with links to reach out via email or Teams chat.
3. **Intuitive and simple org chart:** Only the management level above and below an employee is visible in the org chart. Employees can find a *See more* link to move higher or lower up in the organizational structure if needed. When an employee has many peers who are managed by the same manager, further colleagues are visible to the right and left of the employee's profile picture. The design utilizes the principle of closure by cutting off employee profile pictures to indicate that more personnel are visible beyond the viewport. This helps users understand how to interact with the design.



## DESIGN PROCESS AND USABILITY WORK

### Design Approach

The Digital Experience Design team that received the mandate to revamp CDPQ's intranet opted for a human-centered, Agile design approach, which was a first for the company. The methodology they chose is an adaptation of Alan Cooper's *Goal-Driven Design* as outlined below:



### Research and Design Activities

The team's research and design activities included:

- **User research:**
  - Monitored best practices for digital employee experience, including a review of the 2018 edition of this report
  - Incorporated information from previous research studies (conducted prior to the project) that required validation
  - Created light-weight proto-personas
  - Conducted with 22 “fixed income” investment sector users, which contributed to the definition of the five distinct investor personas whose digital needs were incorporated into the project

- **Requirements definition:**
  - Conducted workshops with key stakeholders from Public Affairs, Talent and Performance, and HR to determine the main use cases for Digital Desktop and guide the application architecture
  - Met with British Columbia Investment Management (BCI), a peer company, to review its intranet and exchange design tips
  - Created iterations of proto-personas
  - Determined main use cases for Digital Desktop through ideation workshops that also guided the application architecture
  - Identified cases that would be part of the Minimum Viable Product (MVP)
- **Framework design:**
  - Determined the navigation structure
  - Conducted a card-sort workshop to confirm the navigation structure and user interface terminology (12 participants)
  - Happy-path mock-ups and interactive prototyping
  - Conducted formative user testing with 12 participants to obtain feedback on key features and desirability (via the AttrakDiff model)
  - Led weekly design reviews
- **Detailed design:**
  - MVP breakdown into user stories
  - “Pixel perfect” mock-ups
  - Produced visual assets
  - Produced detailed UI specifications
  - Conducted formative user testing with 12 participants (four from the first testing sample and eight who were new to the mock-ups) to obtain feedback on key features and desirability and compare results with previous user testing (via the AttrakDiff model)
- **Implementation support:**
  - Provided “last mile” design support to developers

## Design Challenges

The main roadblock faced by the project team was the difficulty in accessing users. Internal users might be captive, but they are not necessarily available to take part in interviews, observations, workshops, or design studios. Therefore, the team had to base its design on assumptions, then carefully validate these assumptions during two rounds of user testing.

## Working with Outside Agencies

Agency	Project Role
<b>Akumina</b>	<ul style="list-style-type: none"> <li>Assisted with technical guidance on their product.</li> </ul>
<b>Mindbreeze</b>	<ul style="list-style-type: none"> <li>A partnership was established where Mindbreeze worked closely with CDPQ teams to implement connectors and develop the front end and relevance tuning, among other tasks, ensuring overall success for the product.</li> </ul>
<b>Avanade</b>	<ul style="list-style-type: none"> <li>Designed initial wireframes and contributed to product vision.</li> </ul>

## GOVERNANCE

### Ownership

CDPQ says its employees own the intranet, not any one team or department; however, the Digital Desktop project has been a success at least in part because of the joint leadership of the company's internal communications, human resources, and digital technology teams. These three parties have placed the employee at the center of all discussions, which has led to the development of a platform that will always meet their needs. How CDPQ communicates to its employees, how it empowers them in their tasks, and how it works with them on development have all led to the product's success.

## Intranet Team Responsibilities

Role	Responsibilities
<b>Design Team</b>	<ul style="list-style-type: none"> <li>Works hand in hand with the development team to complete user research, design user experiences, develop wireframes, design UI, and implement a design system.</li> </ul>
<b>Development Team</b>	<ul style="list-style-type: none"> <li>Works hand in hand with the design team to define user experiences and oversee development.</li> </ul>
<b>Content Managers</b>	<ul style="list-style-type: none"> <li>Subject matter experts from Public Affairs and Talent and Performance (HR) took part in the weekly design reviews and helped the design team with the initial copy writing.</li> </ul>

## URL AND ACCESS

Access Information	
Item	Status
<b>Login</b>	<ul style="list-style-type: none"> <li>Users are automatically logged in through SSO</li> </ul>
<b>Default Status</b>	<ul style="list-style-type: none"> <li>The intranet is the default page in Chrome and Edge and is also a bookmark in the Windows taskbar.</li> <li>Employees can also click on the browser homepage button to access the site.</li> </ul>
<b>Remote Access</b>	<ul style="list-style-type: none"> <li>Remote access is only available with corporate devices (mobile or laptop).</li> </ul>

## TIMELINE

Project Milestones	
Milestone Date	Milestone Description
<b>2000 (approximately)</b>	<ul style="list-style-type: none"> <li>First company news delivered daily through Lotus Notes</li> </ul>
<b>2005 (approximately)</b>	<ul style="list-style-type: none"> <li>First company intranet on SharePoint 2007</li> </ul>
<b>2012</b>	<ul style="list-style-type: none"> <li>Redesign and migration to SharePoint 2010</li> </ul>
<b>2019–2020</b>	<ul style="list-style-type: none"> <li>Vision development for the modern intranet/digital experience platform</li> <li>Product design</li> </ul>
<b>February 2021</b>	<ul style="list-style-type: none"> <li>Digital Desktop (v.1) launch</li> </ul>
<b>September 2021</b>	<ul style="list-style-type: none"> <li>Personalization added to Digital Desktop allowing employees to select their own homepage components</li> </ul>
<b>July 2022</b>	<ul style="list-style-type: none"> <li>Search results factsheets introduced to:             <ul style="list-style-type: none"> <li>Organize previously unstructured information</li> <li>Allow users to quickly reach their destination</li> </ul> </li> </ul>
<b>December 2022</b>	<ul style="list-style-type: none"> <li>“My indicators” experience transforms the Digital Desktop into a KPI dashboard entry point for executive decision makers (aggregated on their homepage)</li> </ul>
<b>Overall project time frame: 3 years (v.1 18 months)</b>	

## CONTENT AND CONTENT CONTRIBUTORS

Content Development and Oversight	
<b>Contributors</b>	<ul style="list-style-type: none"> <li>Team members from three groups contribute to the content and design: the Internal Communication team, HR, and Digital Technologies.</li> </ul>
<b>Encouraging Contribution</b>	<ul style="list-style-type: none"> <li>Teams that don't have direct content responsibilities are encouraged to communicate with Internal Communications so they can add to the variety of content delivered through the Digital Desktop in a more ad hoc manner.</li> </ul>
<b>Training</b>	<ul style="list-style-type: none"> <li>New content managers are onboarded by the Internal Communication team, which shows them how to use the Akumina CMS and teaches them best practices to ensure a cohesive user experience.</li> </ul>
<b>Management</b>	<ul style="list-style-type: none"> <li>Each content manager is responsible for their team's content.</li> </ul>
<b>Maintaining Quality</b>	<ul style="list-style-type: none"> <li>User feedback is welcomed and encouraged, and these suggestions are augmented through insights gained from periodic surveys.</li> </ul>

## TECHNOLOGY

Technology	
Category	Technology Used
<b>Web Server Hardware and Operating System</b>	<ul style="list-style-type: none"> <li>Cloud architecture (PaaS): O365 (SharePoint Online, Azure AD, and CDN)</li> </ul>
<b>Bug Tracking and Quality Assurance</b>	<ul style="list-style-type: none"> <li>Jira</li> <li>Browserstack</li> </ul>
<b>Design Tools</b>	<ul style="list-style-type: none"> <li>Figma</li> <li>Optimal Sort</li> <li>Adobe Photoshop</li> <li>Klaxoon</li> </ul>
<b>Site Building Tools</b>	<ul style="list-style-type: none"> <li>Visual studio code, Azure DevOps</li> </ul>
<b>Content Management Tools</b>	<ul style="list-style-type: none"> <li>Akumina 4.8</li> </ul>
<b>Search</b>	<ul style="list-style-type: none"> <li>Mindbreeze</li> </ul>
<b>Other Functions</b>	<ul style="list-style-type: none"> <li>API integrations (Graph API, PowerBI, Mindbreeze, SharePoint)</li> <li>API manager (Snaplogic)</li> <li>Documentation: Confluence, Klaxoon</li> </ul>

## ROI

The CDPQ team tracks many KPIs, primarily: number of users, number of visits, number of searches, customization by the user, and use of widgets. They also track the type of information users are searching for, as well as the keywords used.

Results from this tracking indicate platform success (measured as of December 2022):

- **Use:** Platform use has been increasing month after month. After one year of general availability, approximately 55% of users use the Digital Desktop at least once per day, while 100% of users use the Digital Desktop at least once per week.
- **Users customizing their experience:** Half of Digital Dashboard users have customized their experiences by selecting favorite tools or configuring their personal dashboard.
- **Response rate:** Around 14% of users visit from a mobile device or tablet, and when mobile push notifications are sent, up to 6% of users click the push notifications to see the content. The response rate has exceeded expectations.

## LESSONS LEARNED

The CDPQ team's lessons learned are also a set of best practices that any intranet team can benefit from following:

- **Put the user first.** “Trying to get users to adopt a solution they have not helped design will be difficult. Adopting a human-centered design principle was of utmost importance and allowed CDPQ to develop the Digital Desktop to meet the real needs of our employees.”
- **Content alone is not enough.** “Push the envelope on user experience and question what makes your employees come back day after day.”
- **Focus on the IA.** “Take this opportunity to review your internal corporate branding and develop a design system. This will help employees find information more quickly because they are using a refined navigation system, both in terms of content and user interface design. This will help users now and also set the tone for further enhancements or additions down the road.”
- **Optimize.** “Don't try to recreate what you currently have, just wrapped in a new skin. Take the time to understand your users and what is most important to them, then seek every opportunity to make their experience as positive and seamless as possible.”
- **Listen to all voices.** “Solicit innovative ideas from all team members, no matter if they are experienced UX experts, analysts, developers, or interns. They are also users so their input will reveal relevant needs and desired experiences.”