

Middleburg Bank

Neighbors You Can Bank On.™



Building a Social Intranet *from scratch*

Intranet Global Forum - 2014

March 7, 2014

Overview



- My background
- Middleburg Financial Corporation
- Why build a social intranet?
- Our approach
- What worked
- Problems, mistakes, missteps
- Six-months post launch – where are we now?
- Questions – mine and yours

*Like you care
about her*



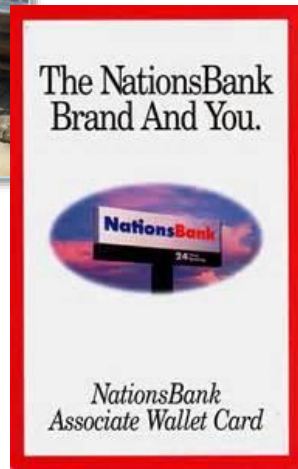
My background



- Been in banking a zillion years



**Barnett
Bank**



Looks like I
can't keep
a job



My background



Miss ADGA
1972



Family



Skanky and Kung Pau Bob

House restoration



Middleburg Financial Corp.



- \$1.2 billion in assets - 90 years old
- Publically held [NASDAQ – MBRG]
- Headquartered in Middleburg, VA



Mosby →



Your business reflects you.
So should your banker.



Gale Waldron,
Executive Director, ArtSquare

Having a banker who knows you means you have a valuable business partner who can help anticipate your needs. Talk to us about the business of running your business. Because the more we get to know you, the more we can help.



Middleburg Bank
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Middleburg Financial Corporation



- About 215 employees
- Median employee tenure @7 years
- Organically grown



Why have a Social Intranet



- Communication
- Document management
- Collaboration
- Social environment



Why have a Social Intranet



- Back to organic growth
 - Not only did the company grow organically
[assets and clients]

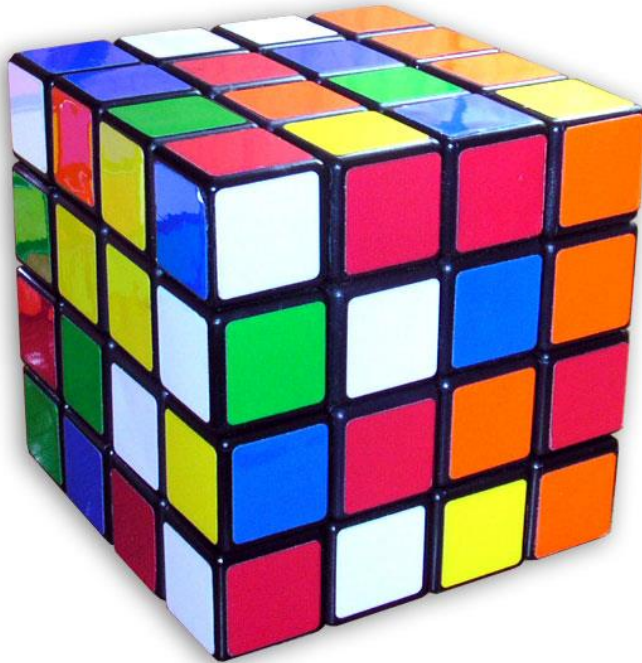
So did our processes, responsibilities and work flow

- But wait, there's more !!

*The social intranet became
a tool to change the culture*



Strategies

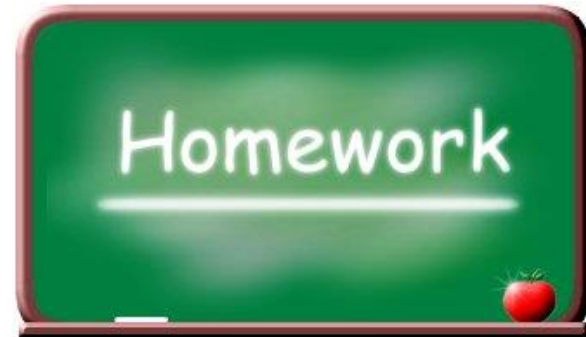


- Leverage global best practices for Intranet development
- Create an inclusive development process
- Develop an Intranet strategy and design criteria first, then engage the appropriate technology partner
- Execute in stages

Best Practices



- Do your homework
- Steal the good stuff – it's okay!
- Cultural match
- Smarter than us
- Find a partner focused on both “the what” and “the way”!



Design, architecture, project management & quality control





Be Inclusive

- Who owns the Intranet?
- Shift the culture
- Watch out for the passive aggressive
- Create accountabilities



Strategy First



- Intranet strategy
- Design criteria
- Technology

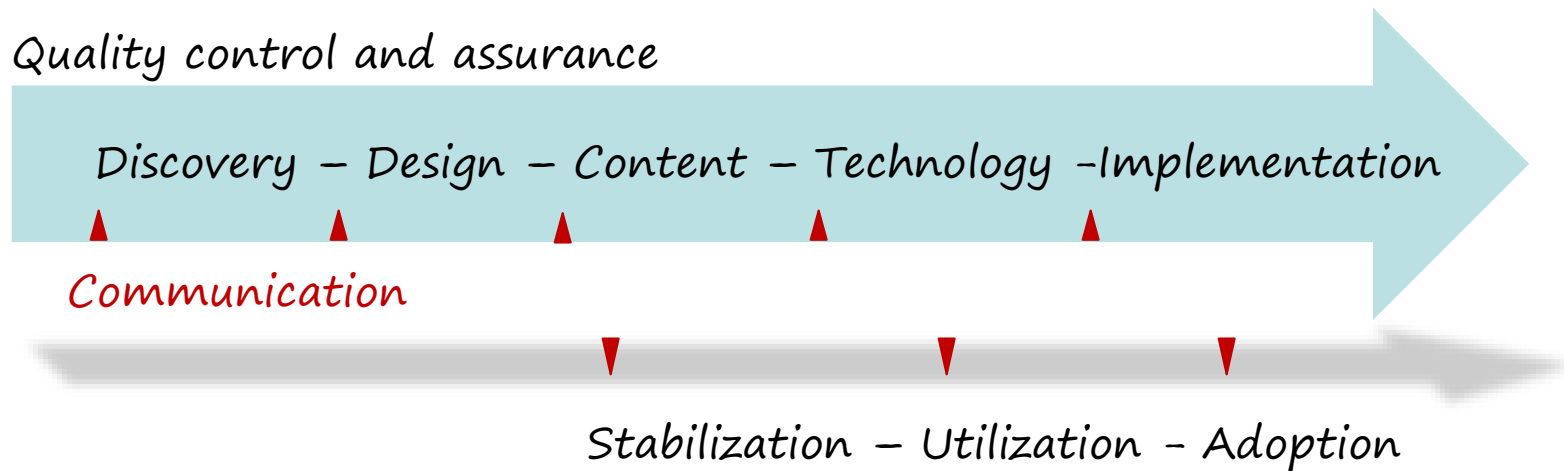


Project Approach



- Execute in stages

Quality control and assurance



Discovery



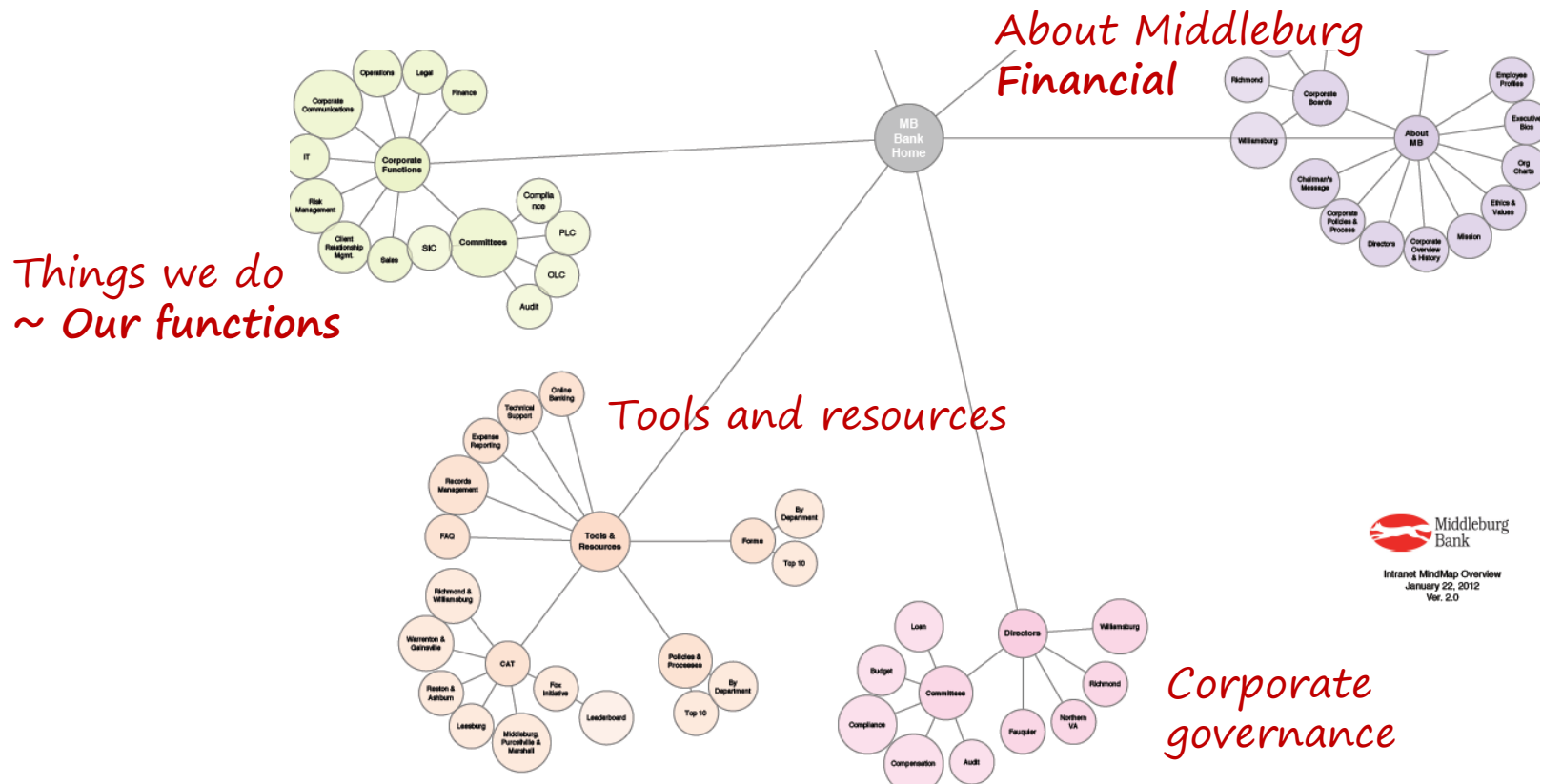
- Ask – don't assume
- Interviews with key leaders
- Electronic survey
- Internal focus groups
- Information audit



Design



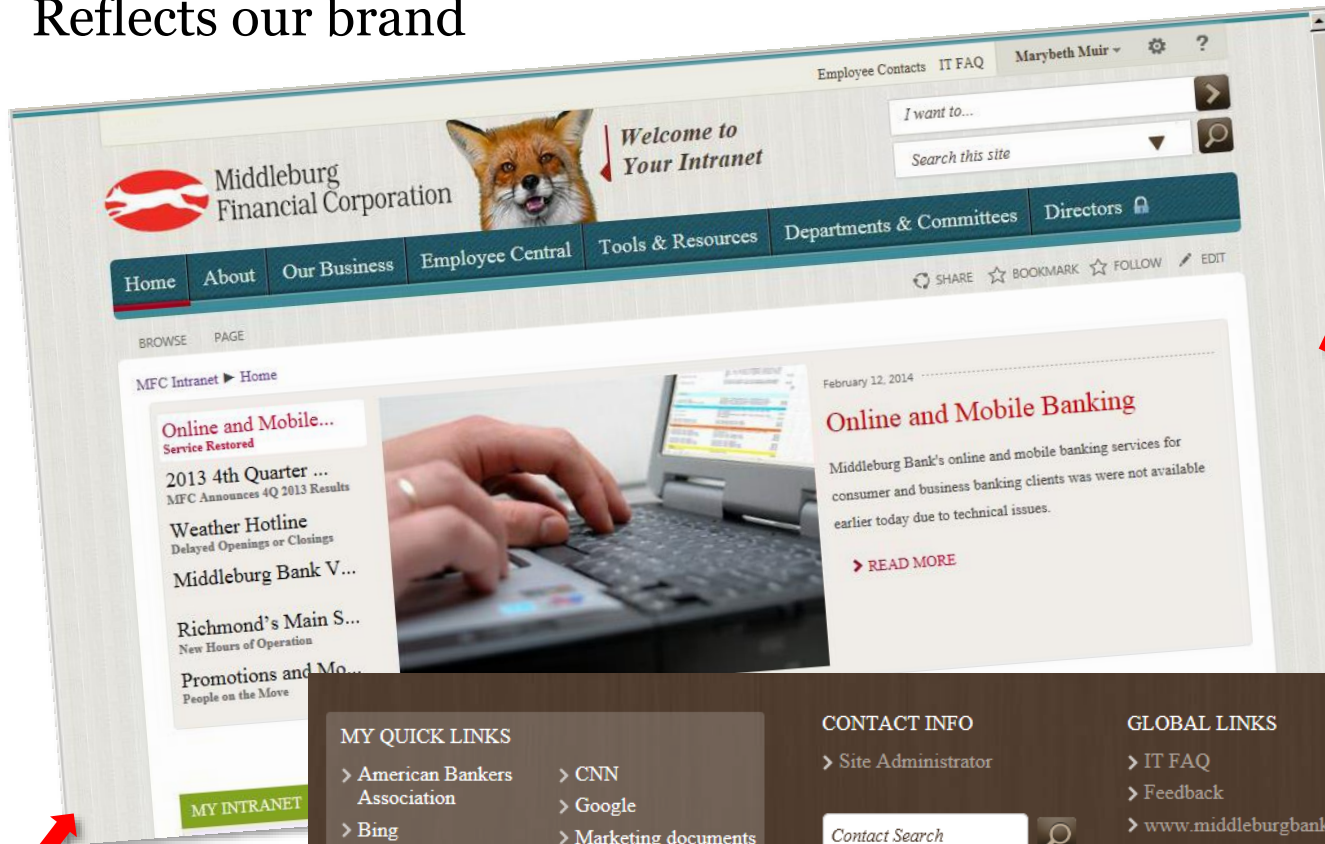
- Mind map reflected the employees needs and broke down the silos



Design



Reflects our brand



Icons
Colors
Typefaces

Mosby

Format

MY QUICK LINKS

- > American Bankers Association
- > Bing
- > BVS Training
- > Epicor
- > Middleburg Bank Logo Wear
- > USA Today
- > Virginia Bankers Association
- > CNN
- > Google
- > Marketing documents
- > Marybeth's files
- > Project Site
- > Yahoo Finance

CONTACT INFO

- > Site Administrator

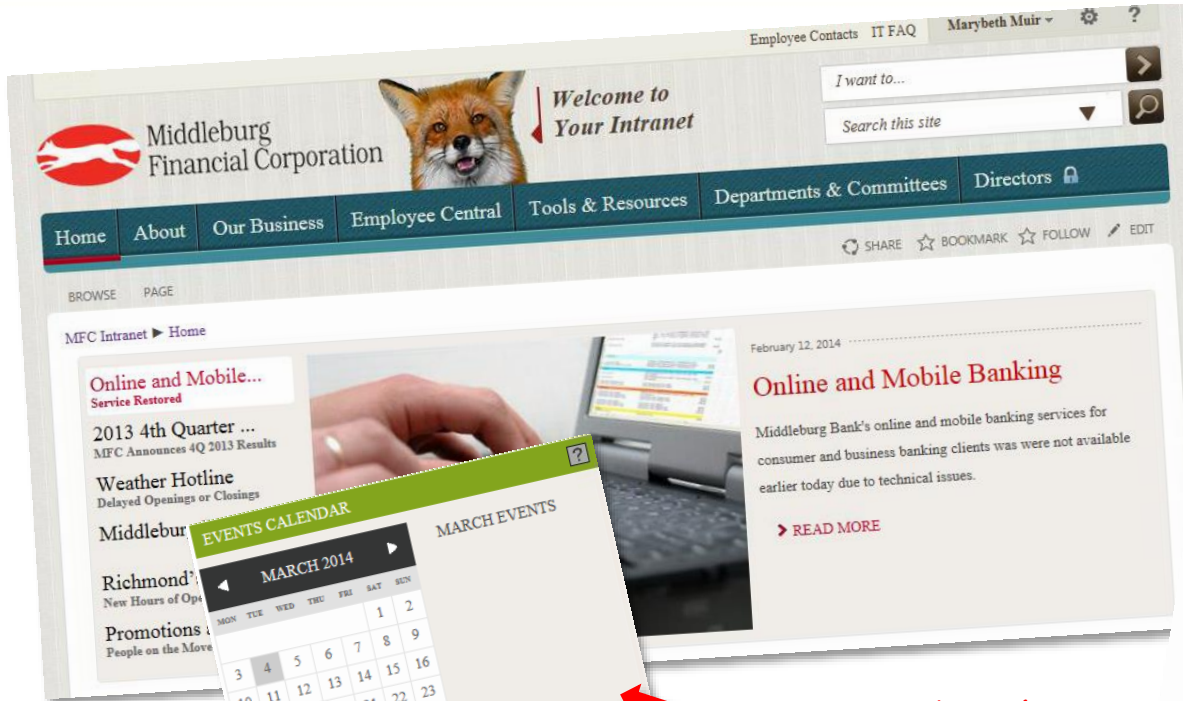
Contact Search

GLOBAL LINKS

- > IT FAQ
- > Feedback
- > www.middleburgbank.com

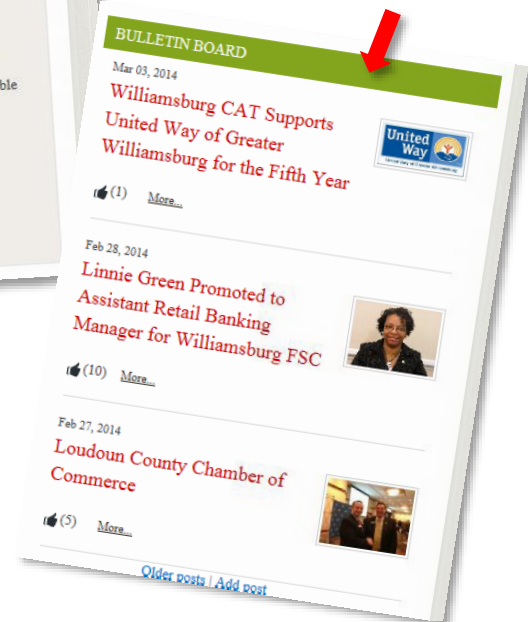


Designed for Social Needs



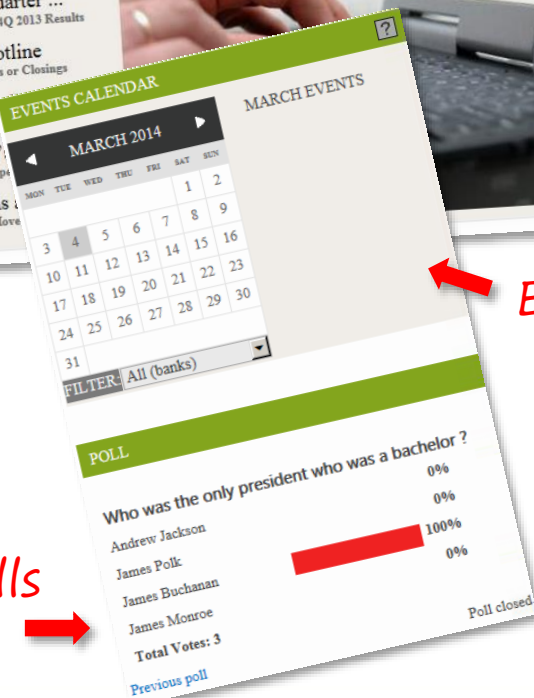
Follow or
Bookmark

Bulletin Board



Event Calendar

Polls



Governance



- Executive champion
- “Co-owned” by Marketing and HR
- Full time administrator
- User team
- Leadership
- Content ownership
- Information Technology & Strategic Planning

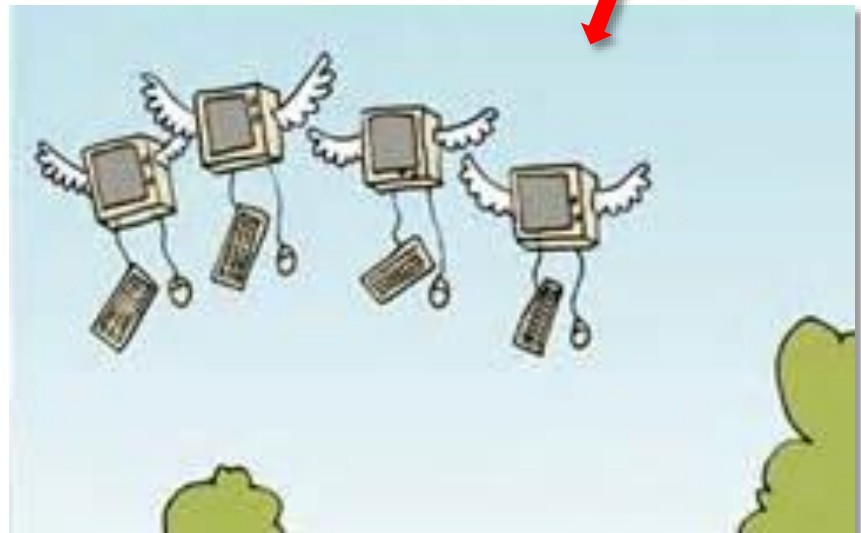




Content Migration

- Completed a content audit
- Purged
- Created a content map
- Migrated in stages
- Our biggest nightmare! [almost]
- Tons of content – poorly organized

Content migration



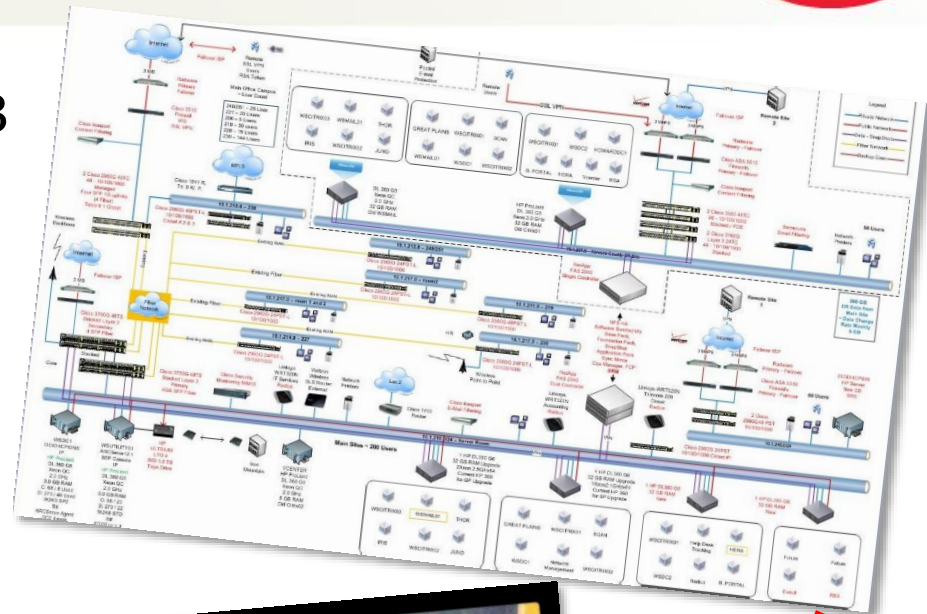


Technology

- Choose SharePoint 2013
- Technology audit
- Big decisions



Technology



Audit

Big Decisions



Implementation & QA



- Big bang
- Testing throughout
- Developed and executed testing scripts
- Engaged employees to help test
- Champions as trainers post launch
- Worked nights and weekends!
- Communication



Post Launch



- Two short-term goals



↖
Stabilization



How did it go?



- The partnership
- Corporate inclusion
- Working in stages
- Quality plan
- Communication

Opportunity for Improvement



- Technology
- Document management



Worked

Questions?



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