

MarCom Awards 2021

Category: 230. Intranet

The logo for Wipfli, featuring the word "WIPFLI" in white, bold, uppercase letters on a blue rectangular background.

Situation and action statement

Over the past decade, Wipfli has experienced dramatic growth and has evolved from a mid-sized accounting firm to a top-20 firm that derives 40% of its business from consultative services in a variety of industries and practices.

In 2020, the firm launched a new brand identity, transitioned to Microsoft Teams and hired a new internal communications team to modernize the communications plan and strategy.

The team redesigned the the weekly newsletter (see our submission in the e-newsletter category) to align with the new branding and our redesign of the intranet, which is called Insite. The two now work in tandem.

We've seen a nearly 200% increase in intranet traffic and surveys of associates have resulted in 82% having a "very favorable" or "favorable" opinion of Insite. Feedback is a vital part of associate engagement. We've added a feedback mechanism on all significant intranet pages.

The remaining pages show the following:

1. The previous intranet
2. The home page of Insite today
3. Pop outs of sections of the home page with the strategic value or rationale for each
4. A few additional pages to highlight some of the other improvements to Insite

The previous intranet

Built on an early iteration of SharePoint, the intranet was largely static and underutilized. Engagement was extremely low, and users commented it was difficult to find anything. There was no alignment with the weekly newsletter, and it was not integrated into the rest of SharePoint search.

The screenshot shows the WIPFLI InSite intranet interface. At the top, there is a navigation bar with links: Home, Working at Wipfli, Wipfli 2025, Industries, Service Lines, Markets, and Depart. Below this, a large 'News' section is visible. A dropdown menu is open under 'Industries', listing categories such as Agriculture, Construction & Real Estate, Dealerships, Employee Benefit Plan Audits, Financial Institutions, Health Care, Manufacturing & Distribution, and Nonprofit & Government Practice. On the left, there are news items dated 9/25/2018 and 9/21/2018, with headlines like 'Crucial tax changes affecting...' and 'Guidance on Client Acceptance...'. The overall design is dated and lacks modern user experience elements.

This screenshot shows a different view of the WIPFLI InSite intranet. The navigation bar is similar to the previous screenshot. Below it, there is a section titled 'Pages' with a table listing various documents. The table has columns for Type, Name, Modified, and Modified By. The listed pages include 'Associate Records Access Policy', 'Confidential Information Policy', 'default', 'DirectPayrollDeposit', and 'DirectPayrollDeposits'. The interface appears cluttered and lacks a clear search or navigation structure.

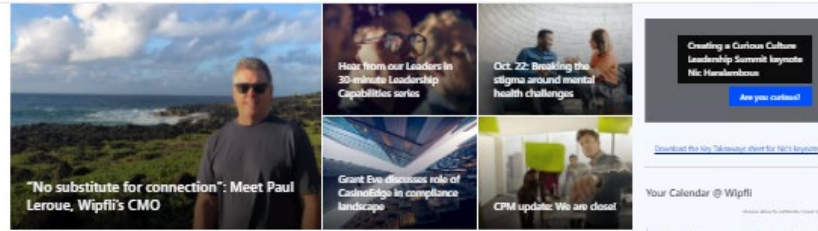
This screenshot shows a user dashboard on the WIPFLI InSite intranet. The navigation bar includes links for Home, Working at Wipfli, Wipfli 2025, Industries, Service Lines, Markets, Departments, News Archives, Sites, and Message Board. The dashboard is divided into several sections: 'News' on the left with a list of articles; a central 'Welcome, Julie!' section with 'Quote of the day', 'Your PTO Balance: 22.75 hours', 'Timesheet status: Due in 2 days', and 'Your Goals: xyz'; a 'Search' section with a Google search bar; and a 'Links' section on the right with a list of resources like 'MyHelp for ServiceNow', 'Associate Roster', 'Professional Profiles', 'MyPerformance', 'MyRewards', 'MyLearning', 'MyOnboarding', 'Wipfli CRM', 'External CPE Request Form Online', 'Wipfli Merchandise Store', 'New Client Incentive Request', 'The Link', 'Wipfli Playbook', 'Internal Job Board', and 'Playbook in Action Webinars'. The dashboard is visually busy and lacks a cohesive design.

The new home page of Insite

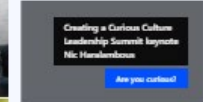
New mega menus
(detailed on page 5)



Top stories



Tip of the week
We promote important information or hot tips from our Learning & Development or IT teams



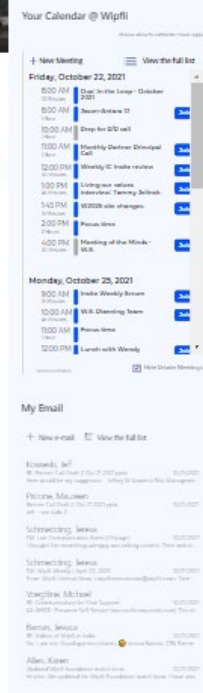
Additional news

After stories leave this section of the home page, they are captured on our News @ Wipfli page (detailed on page 6)



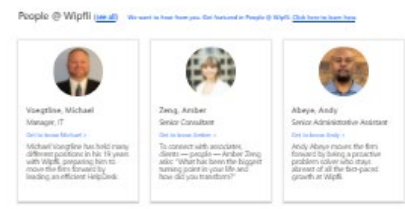
Associate calendar and latest email

To encourage associates to spend more time on Insite, our developers built a web app to bring their calendar into the intranet and allow them to join a Teams meeting directly from here. They can also see new emails come in and open them right from here.



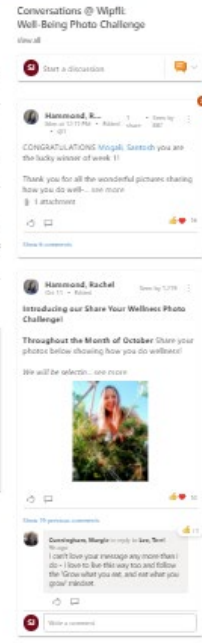
Associate Spotlights

We show the three previous weeks' worth on the home page.



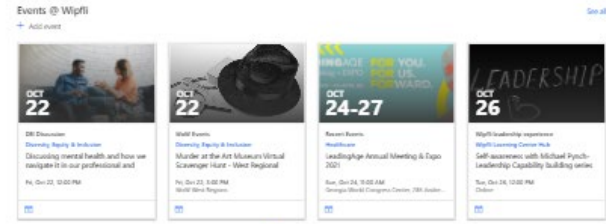
Yammer Spotlight

Yammer communities are Wipfli's internal social network. We feature a different community every two weeks.



Events

Events live on individual pages within the site and aggregated here. Example, associates can see events in a single market on that Market's intranet page.



This allows for browsing Insite without having to click back to Outlook

Time Zones
Wipfli has offices across the U.S. and in Asia. Associates collaborate across the country and the globe. Our Intranet was designed to support our distributed workforce.




Enlargement of sections from the home page


Our Associate Spotlights include the CTA to encourage associates to fill out an online form and submit themselves to be featured in the section.

Our tip of the week usually links to a 2–3-minute video. We replace it one week before our town halls with a countdown clock and link to join the meeting. In this example, we are sharing an important talk with the entire firm, which leaders saw in their annual summit.


People @ Wipfli ([see all](#)) [We want to hear from you. Get featured in People @ Wipfli. Click here to learn how.](#)




Voegtline, Michael
Manager, IT
[Get to know Michael >](#)
Michael Voegtline has held many different positions in his 19 years with Wipfli, preparing him to move the firm forward by leading an efficient HelpDesk.



Zeng, Amber
Senior Consultant
[Get to know Amber >](#)
To connect with associates, clients — people — Amber Zeng asks: “What has been the biggest turning point in your life and how did you transform?”



Abeye, Andy
Senior Administrative Assistant
[Get to know Andy >](#)
Andy Abeye moves the firm forward by being a proactive problem solver who stays abreast of all the fast-paced growth at Wipfli.



[Download the Key Takeaways sheet for Nic's keynote](#)

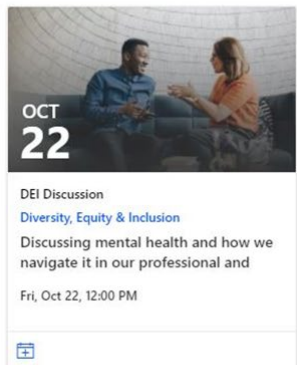
Your Calendar @ Wipfli

choose allow to authorize Power Apps


Events @ Wipfli

[See all](#)

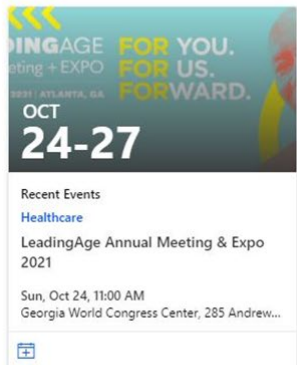
+ Add event




OCT 22
DEI Discussion
[Diversity, Equity & Inclusion](#)
Discussing mental health and how we navigate it in our professional and
Fri, Oct 22, 12:00 PM



OCT 22
WoW Events
[Diversity, Equity & Inclusion](#)
Murder at the Art Museum Virtual Scavenger Hunt - West Regional
Fri, Oct 22, 3:00 PM
WoW West Regions



OCT 24-27
Recent Events
[Healthcare](#)
LeadingAge Annual Meeting & Expo 2021
Sun, Oct 24, 11:00 AM
Georgia World Congress Center, 285 Andrew...



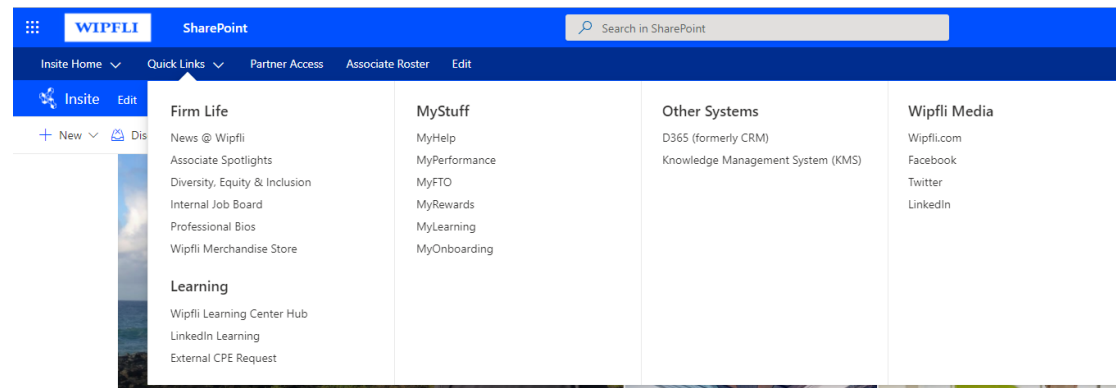
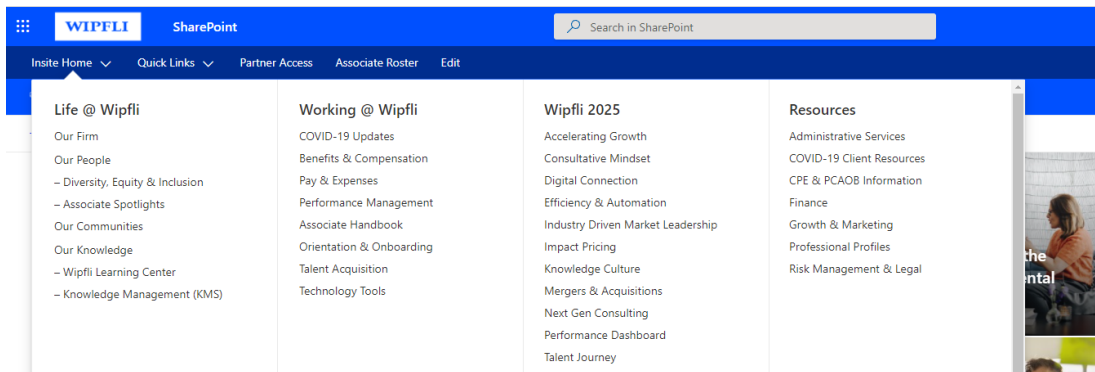
OCT 26
Wipfli leadership experience
[Wipfli Learning Center Hub](#)
Self-awareness with Michael Pynch- Leadership Capability building series
Tue, Oct 26, 12:00 PM
Online

New mega menus

We use two mega menus that cover 95% of the intranet use cases. The first menu is the basic map to Insite and includes:

- **Life @ Wipfli** houses information about the firm (org charts, locations, etc.), our culture, our community focus (the Wipfli Foundation and our community service work) and our internal learning and career development tools.
- **Working @ Wipfli** is where associates can find all HR-related information and guides to our technology tools.
- **Wipfli 2025** links to initiatives of our strategic plan. Each page including videos on the importance of each initiative.
- **Resources** includes templates from marketing, forms from finance, one-sheet profiles of all client-facing associates and other valuable materials.

The second menu is our quick links, which includes access to the various “culture” pages (News, Associate Spotlights, our DEI and BRG initiatives), links to our Help Desk, time off requests, our KMS, our CRM our learning and development section (the Wipfli Learning Center) and our external social media.



News @ Wipfli

When associates want to dig deeper than the highlights on the home page, they come to this section. We have established 6 categories of news:

- Firmwide
- IT (known as I3T at Wipfli)
- Learning & Development
- Culture
- Benefits
- Wipfli in the Media

Two sections aggregate news from pages across the firm. This allows individual stakeholders to be responsible for their pages and the internal communications team can curate news to the home page or to significant pages elsewhere on the site.

1. Firmwide: pulls news from our various industry, service line and market pages
2. Culture: Aggregates news from the individual BRGs (which roll up to our DEI page) as well as stories posted directly to the DEI page. Additionally, it pulls news from our community pages, including the Wipfli Foundation, our Community Day page and our volunteerism page.

Each section has a “see all” option to access all historical stories from that section. In addition, the blue text above each story will take the user to that section, so associates can easily access all DEI stories and stories from the various other pages on Insite.

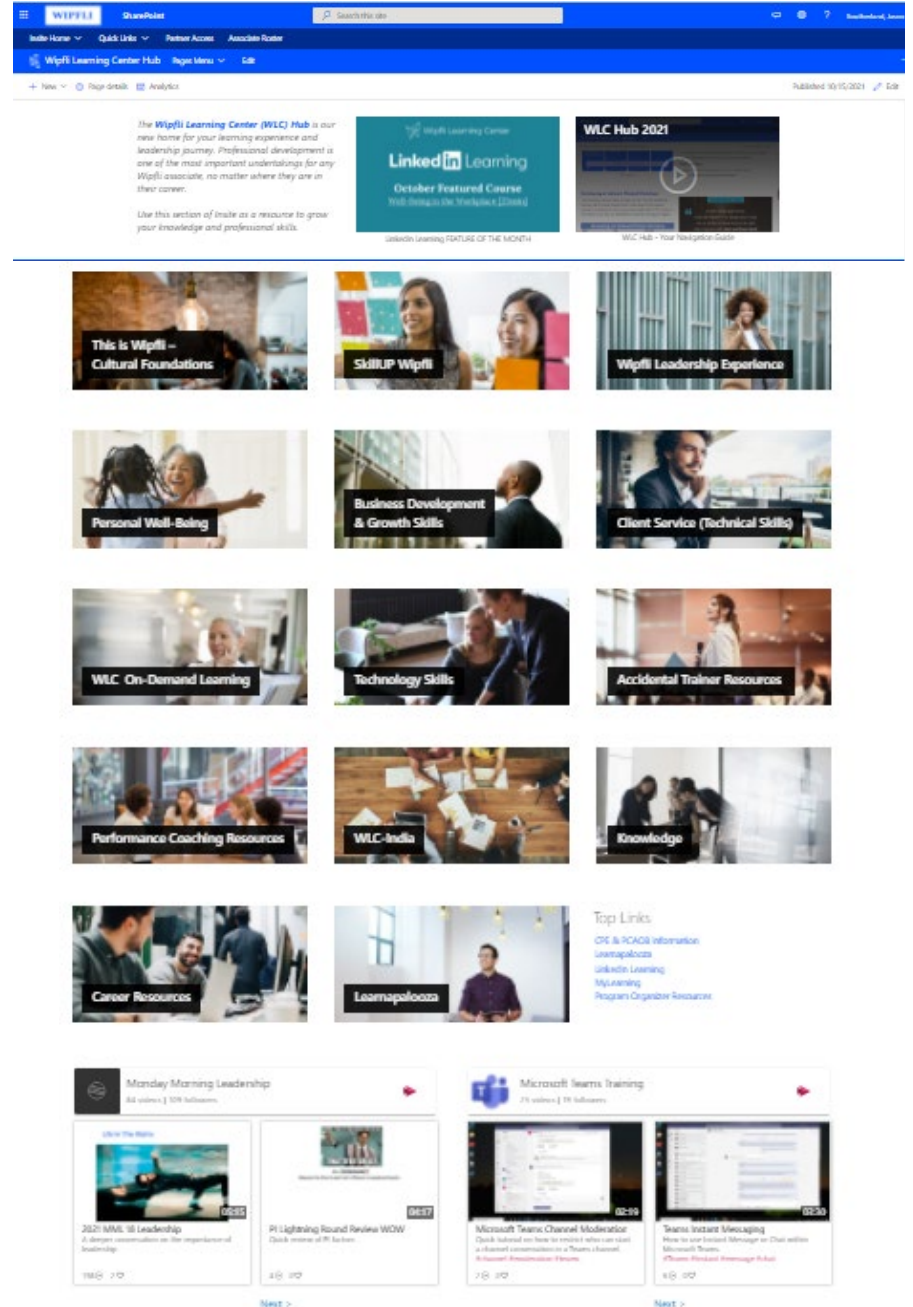
The screenshot shows the SharePoint interface for 'News @ Wipfli'. The top navigation bar includes 'WIPFLI', 'SharePoint', and a search bar. Below the navigation, there are links for 'Insite Home', 'Quick Links', 'Partner Access', and 'Associate Roster'. The main content area is titled 'News @ Wipfli' and includes a 'Published 6/16/2021' timestamp. The news is organized into six columns, each representing a category: Firmwide, I3T, Learning & Development, Culture, Benefits, and Wipfli in the Media. Each category has a 'See all' link and a 'Add' button. The news items are displayed in a grid format, each with a thumbnail image, a title, and a brief description. At the bottom of the page, there is an 'Archived News' section and a large video player with the text 'Wipfli careers: Curiosity lives here' and 'Our team has many talents + perspectives'.

The Wipfli Learning Center

The firm has made substantial investments in learning and career development.

Using a “main hallway” approach, we created a landing page that allows associates to quickly identify the “doors” they can walk through to get to the “room” of information they are looking for.

1. There are a range of courses and initiatives run by our internal L&D team that support the first-year associate, the new manager, continued growth and leadership development. In addition, we encourage personal well-being and knowledge sharing through the Wipfli Learning Center.
2. We have a partnership with LinkedIn Learning that provides associates with access to the entire catalog of courses and the integration allows associates to report and get credit for any learning they do through that platform.
3. We host an annual 2-week learning festival – much like a TEDx event – and we house the recordings on the WLC.
4. Associates can also access our series of Microsoft Teams training videos and a weekly 15-minute video series – Monday Morning Leadership – produced by our Director of Learning and Organizational Development.

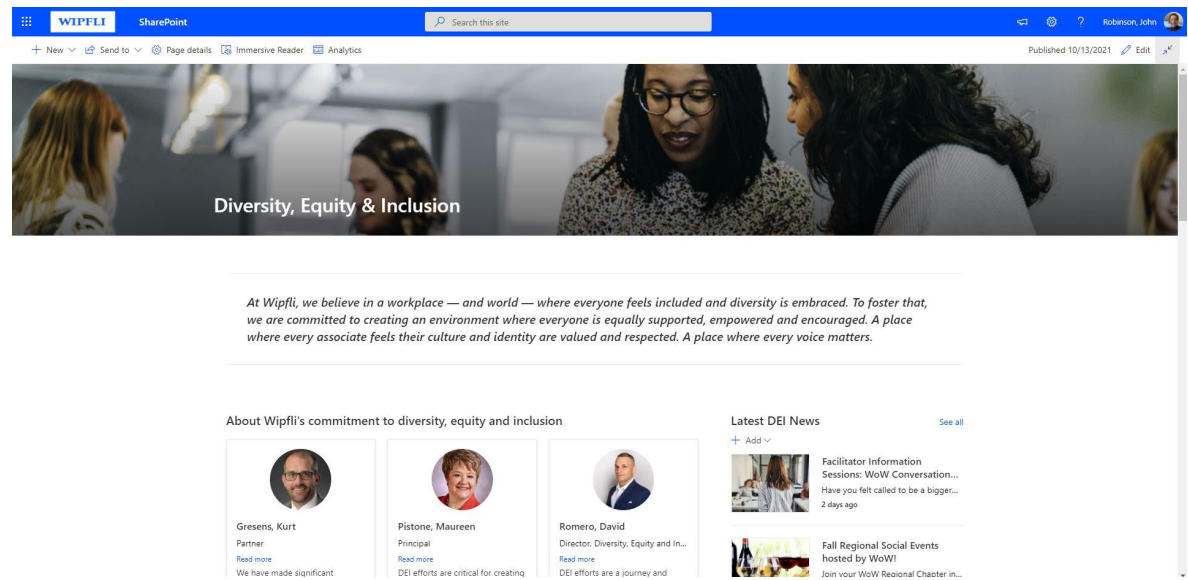


DEI landing page

An example of a page that includes a range of information.

We had to find a clever way to present statements about the firm's DEI commitment from our Managing Partner, our Chief People Officer and our Director of DEI. Using the "employee spotlight" approach, we were able to highlight the them of each message and allow associates to click through if they want to read more.

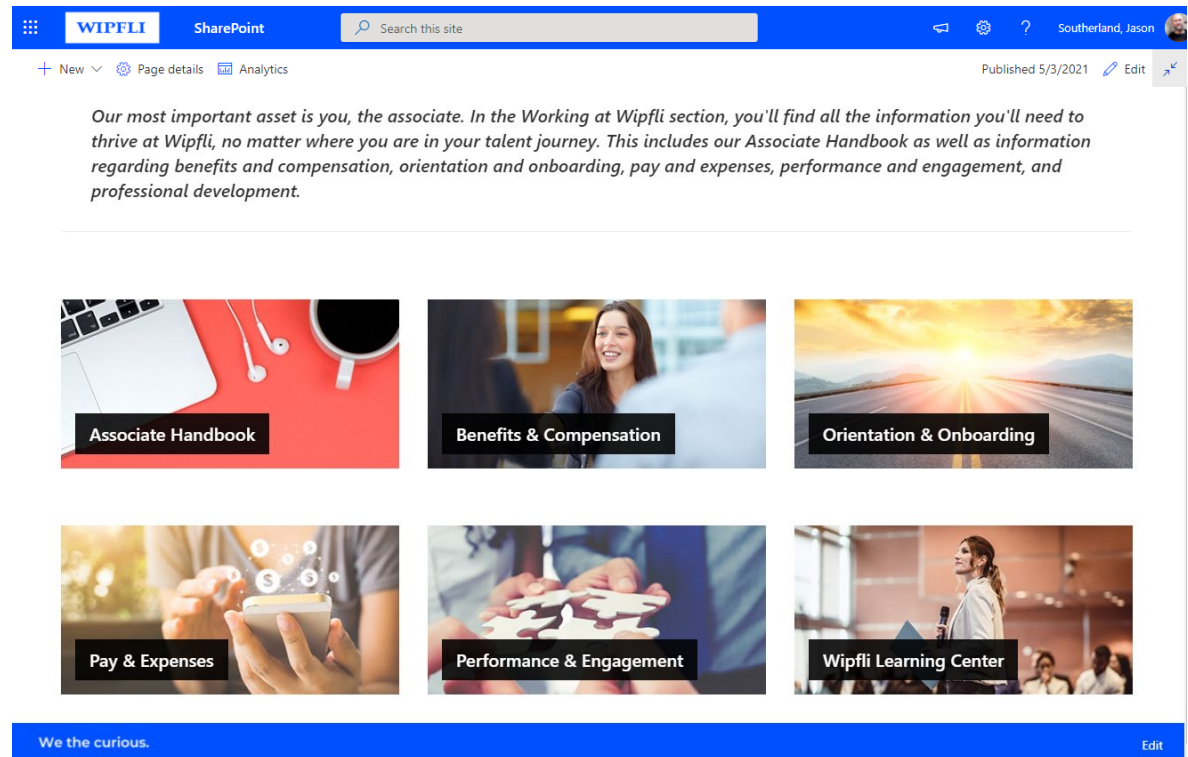
Here you can also see an example of how the news is presented on a page and then rolls up to our home page.



Working @ Wipfli landing page

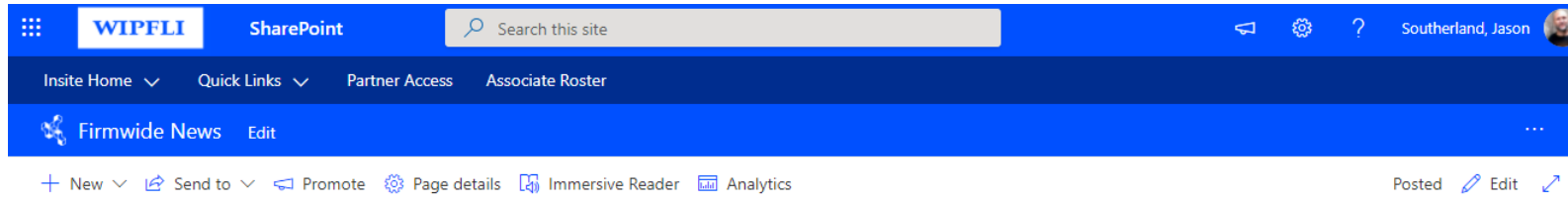
The resources associates need for managing their employment at the firm should be easy to access, navigate and search.

Moving to a visual "main hallway" concept allows associates to see the "doors" to the information they need in an easily identifiable and recognizable approach.



A sample news story on Insite

Associates navigate to an individual news story from the top tiles or the additional news section of the home page. They can also access the story from the News @ Wipfli section. We can include calls to action and photos to bring our brand and our visual style to each section. Associates can quickly access all Firmwide News by clicking the logo or name in the menu bar at the top.



“No substitute for connection”: Meet Paul Leroue, Wipfli’s Chief Marketing Officer

On the day we chatted with Paul, he was just hours away from a 30-year reunion with his old marketing team at Coors. In the early 90s, Paul was part of a 10-person team that launched Zima, a wholly new alcoholic beverage – not quite beer, not quite wine cooler. It was “Zomething different,” and by the end of its first year, nearly half of American drinkers had tried it.

If Paul is tipping one back himself today, he stays true to the Coors brand—opting for the classic or a Coors-owned craft like Colorado Native, made in his home state. “You never lose that loyalty when it’s something you think about and do every day,” he says.

Overall, as origin stories go, this one bodes well for Wipfli. It’s a story of community, of lasting connection and intentionality.

Stepping up to the CMO plate

Paul was named Wipfli’s chief marketing officer this summer. He was CEO of Stratagem and became a partner at Wipfli when the Colorado-based CPA firm joined us in January 2020.

Over the course of his career, Paul has held both executive and marketing roles. From director of North American marketing for Reebok to head of his own brand development firm, Paul brings perspective from both disciplines. A marketer at heart, he describes himself as a “consummate brand builder” and is excited for what’s ahead at Wipfli.

“We are maturing and growing and evolving very quickly, and I love doing that kind of work more

Tune in during the next Firmwide Meeting to hear Paul present on the evolution of our brand.

[Join Nov 11, 10 a.m. CT](#)



Paul and his wife, Vicki, hitting the trails

