

Microsoft SharePoint Navigation

Planning and Strategy Best Practices

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eBook

YOU WILL LOVE THE WAY WE WORK. TOGETHER.

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70% of people start their journey by navigating. It is at the very heart of an effective digital workplace.

Navigation Design Is A Priority

In today's world, the digital workplace empowers organizations to adapt and be resilient to the changes we are all experiencing. Today, effective digital workplace design is about more than establishing a great digital hub for your digital workplace (your Intranet) and is much more about how we can improve digital experience, excellence, productivity, and collaboration with the effective use of technology.

While navigation is the #1 use case for an Intranet and its most crucial purpose, many fail to deliver dynamic and personalized navigation.

When navigation is broken or poorly implemented, it is easy for a simple task to take exponentially longer than necessary. Knowing the best place to share a specific document, where there might be applicable reference material, or who the best supportive experts/team members are for some work you are performing can be a challenge in most organizations and better navigation design can greatly improve these experiences.

Navigation is not easy today. While there are great designs and improvements within services and apps there are plenty of gaps remaining in the technology itself. As an example while Microsoft Teams, SharePoint, Yammer, Microsoft Viva, and Microsoft 365 all provide many ways to navigate, none of them provide a way to navigate based on your organizational context (filter all teams by department, or filter all sites by product, etc.).

NOTE: Your Intranet is the foundation for internal success in the workplace. Microsoft 365 offers many advantages your business will want to leverage. The journey towards better internal communication and collaboration begin in our 170+ page whitepaper.

"The Definitive Guide to Microsoft 365 Intranets"



Navigation Challenges Lead To...

- Challenges for new users to onboard and engage
- Harder to find resources & user frustration
- Uncertainty on if it is the right resource or who owns it
- Inefficient reliance on others to link or direct

Poor navigation creates unnecessary inefficiencies and dependency on already overburdened resources to fill the navigation gaps with their time and effort directing requests, linking workspaces, and more due to unmanaged or poorly design navigation. Navigation should not be static and curated but dynamic, personalized, and contextual.

The tools and design patterns are there for you to take advantage of, but it does require focus and effort to implement them the right way, configure them optimally and extend/enhance where appropriate.

In this eBook, we will explore many proven patterns and practices, but first, a closer look at the User and IT experience individually.

User Experience

70% of people start their journey by navigating, and it is a vital focus area for an effective digital workplace. The most visible challenge of unmanaged and poor design is poor navigation.

Reliable navigation is crucial to the user experience. Without it, new users and existing users will

never find anything efficiently or will end up learning how to work with a broken system.

It doesn't help me get to what I need on a day-to-day basis.

When new employees begin their employment, navigation issues should be the last thing to actively occupy their thoughts. Not only that, but it also increases the handholding required. The start of a new employee's journey can be anxiety-riddled in any environment, at any job. Suppose the employee cannot fundamentally do their job due to their inability to navigate your digital workplace. In that case, you may have inadvertently made their journey to success a lot more complicated.

It's too cluttered with content and not intuitive to use.

There is no choice in adapting the user experience to my taste

lt's not easy to move between different environments or portals.

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This is consistent with long-term employees as well as while the organization continues to evolve, change, and accelerate. Good navigation design enhances a user's understanding and gives them confidence using your digital workplace technology.

Today, one of the significant challenges is that the navigation landscape is fragmented across



many apps, services, and experiences employees use. Users have to learn navigation patterns per app or experience. When they want to perform searches or navigate across these, even in Microsoft 365, it can be a challenge due to how organizations have implemented competing vendors, poorly integrated or nonintegrated systems.

The good news is that proven designs and investments can overcome these end-user experience challenges. By investing in tailoring, configuring, and enhancing the navigation experience across the digital workplace, you can greatly improve employee efficiency, productivity, and related business outcomes.

IT Experience

One thing is inevitable; if the UI/UX is a mess, you can bet the backend is worse. Your IT department can provide reactive support all day. However, navigating the sprawl of Teams, SharePoint Sites, Yammer communities, and more, takes considerably more effort for those

resources since they don't always have the business context or learning that some end users had to learn by necessity.

The need for IT to support management, leadership, and enduser navigation is clear. While out-of-the-box has a great set of experiences that are necessary to understand, they are not sufficient for the volume and complexity of your expected (or existing) digital workspace sprawl.

IT needs to support the business needs of today. For larger organizations, this includes more than what is available out of the box in Microsoft 365, which includes more personalization and better experiences for navigating hundreds of curated links and multiple organizational intranets or portals.



Sample Of IT Challenges

The good news here is that there are proven solutions like the digital workplace directory that can serve as a basis for unified governance, lifecycle management, provisioning, and navigation of digital workspaces. There are proven enhancements that organizations implement across thousands of Intranets that go beyond the out-of-the-box navigation patterns. Investing more time into navigation IT greatly reduces the cost of ownership, better visibility, and a more cohesive platform to provide technology services and experiences.

How To Plan Effective Navigation

Navigation starts by understanding clear navigation objectives and designing your nav based on identified user scenarios, personas, and user goals. These need to be S.M.A.R.T. or specific, measurable, achievable, relevant, and time-bound. While it can be tempting to start with digital workplace objectives that relate to navigation that are generalized, these can often reduce your ability to prioritize the right investments.



Interested in better understanding digital workplace objective design or how Microsoft 365 meets or can be measured against objectives? Check out this popular 50+ page whitepaper we have published.



Aligning To Navigation Objectives

As an example, you might start with these high-level navigation objectives, which could be further broken down with specific examples per persona or user grouping, or based on known user scenarios:

- Create and maintain clarity:
 - Navigation should be clearly and meaningfully labeled and signposted so that users understand where they are and where they can go.
- Create and maintain consistency:
 - When consistency is maintained, and clarity is promoted, <u>navigation is easier to</u> comprehend, and efficiency is improved.
- Continually improve navigation efficiency:
 - Navigation should require less clicks or delayed interactions to see and get where you need to go.
- Continually improve navigation usability:

 When usability is focused on, it leads to better navigation experiences that work for more varied audiences from accessibility to functionality.

Now let's dig deeper into a specific example. When you are designing your global navigation for your organization, you should embrace these objectives.

Improve & Maintain Navigation Usability

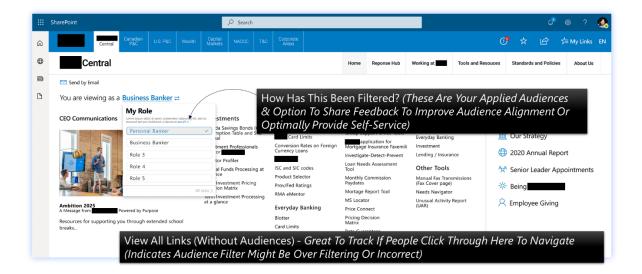
Example 1: Avoiding the use of dropdown menus and embracing mega menus <u>would improve</u> <u>navigation efficiency and usability</u>. This is because mega menus are bigger, divided into contextual groups, visible at once, avoid users skipping important pages or links, and can reduce the need to scroll (which users generally hate). So, for this example, our global navigation will utilize a mega menu design.

Menu style

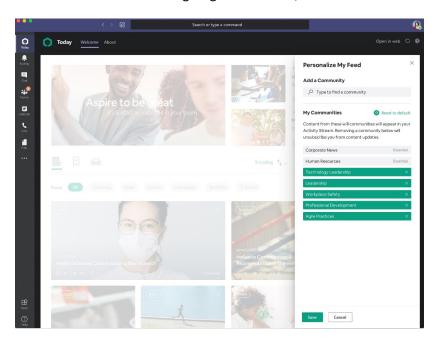


If this was a custom mega menu, this would also enable the addition of storing signals of usage for navigation reporting experiences, enabling adaptive improvements to usability of the navigation and its design.

Example 2: By targeting menu links to users, we can ensure irrelevant links do not display to them by default. SharePoint out-of-the-box supports this, and so too should any customized mega menus that might be established. Keep in mind that while you should leverage audiences in the navigation, that when you do, it is an excellent opportunity to get feedback on how well designed our audiences are. Going beyond out-of-the-box, it would be even better if users could tailor these audience rules in case they wish to see content that wouldn't typically be targeted to them based on AD information or group memberships.



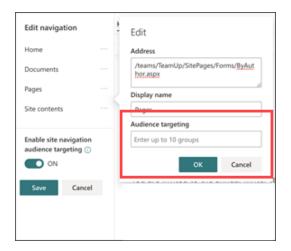
The design of this could be similar or integrated with how you control your news feed(s) or activity streams. So, the personalization is configured once but would apply across multiple landscapes, including their global navigation experience, improving consistency. The more we can clarify users when and how information is being targeted to them, the better their usability will typically be.



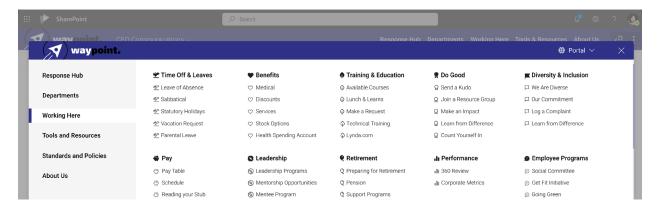
Improve & Maintain Clarity

Example 1: Having a navigation link called "Resources" is less effective than having links clearly visible that differentiate resources or make it easier to sort, filter, or navigate the resources themselves. This means when you illustrate that policies link – you can show related useful links in the mega menu for navigating policies themselves, such as Policy Center, My Policies, By Business Unit, By Department, Policy Search, etc.

Keep in mind using audience targeting that you could have links with different labels for new employees or more specialized terms you know a certain audience would be aware of to provide that extra personalization/adaptation to the internal audience. While this is limited out-of-the-box, you could certainly enhance this in your global navigation design.

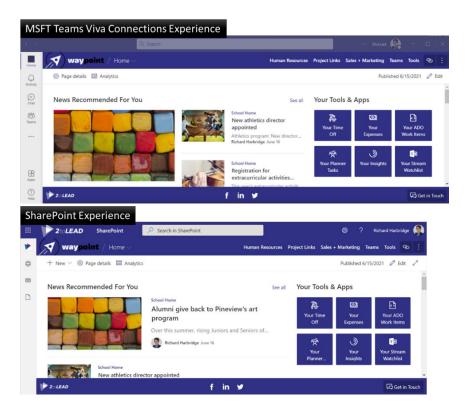


Example 2: We know that navigation design is best handled by visual and text-based design instead of one method or another. So, our mega menu could also utilize icons beside links to help users more easily navigate (assuming we build our global navigation). We will also use these icons for quick links within site pages and quick link navigation design to improve consistency.

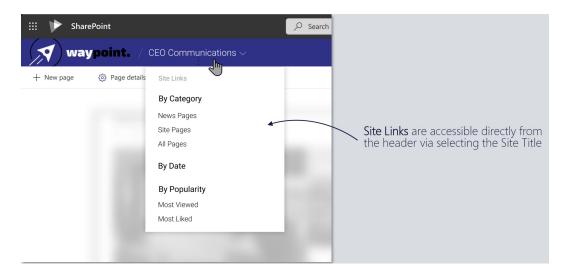


Improve & Maintain Consistency

Example 1: Did you know that via Viva Connections, you can have your SharePoint global navigation design show up consistently in the Microsoft Teams experience as well? Designing your customized mega menu or using the simple out-of-the-box global navigation menu ensures it will show up in Teams, SharePoint, the mobile apps, and more, which is more consistent than having it only display in a subset of SharePoint sites as an example.



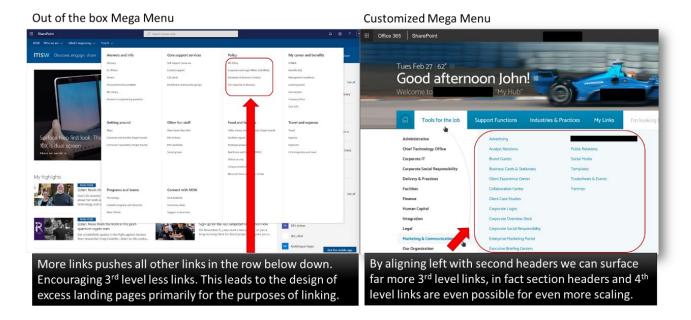
Example 2: We want this menu design to also adapt based on where the users are – instead of looking for 'localized' navigation elsewhere on the page, such as along the left side or in quick links. In this example, we look to add local navigation to this design for the mega menu itself, which might further improve consistency and efficiency.



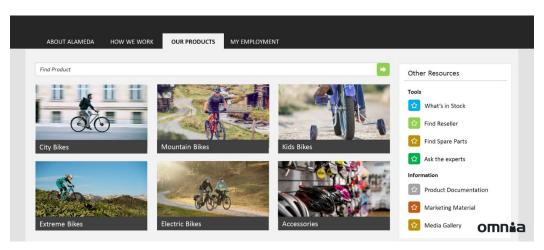
Improve & Maintain Navigation Efficiency

Example 1: The mega menu design already improves efficiency over other models, but we can further enhance this by reducing the number of landing pages needed and enhancing the mega menu itself. As an example, the standard OOTB design for SharePoint supports a mega menu, but this has visual limits

on the number of reasonable 3rd level links. With a left-aligned design, we can add more 3rd level links if that is important for the organization, reducing the number of 'landing pages' needed as link launch pads.



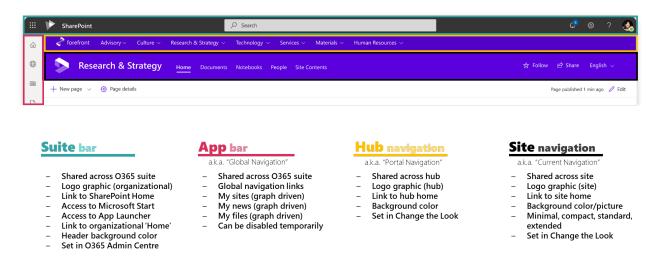
Example 2: Mega menus don't have to be full of just links. If our goal is to reduce landing pages, we can also provide an experience that surfaces key information and saves the end user clicks. When navigating to say Products in the navigation header, why not display an experience to search your products? Bringing key experiences forward is also available from anywhere else in the connected digital workplace where the global navigation displays.



How should we plan to best leverage Microsoft 365 navigation?

In Microsoft 365, Intranets act as a portal to many key areas of interest within the business. The navigation should be personalized and dynamic for the Intranet to improve relevancy and usage.

In SharePoint Online, you can create a navigation experience with global navigation, hub navigation, site navigation, local site navigation, and then links on the page(s) themselves. Not only this, but through Microsoft Viva Connections some navigation is also brought directly into the Teams app experience both in the desktop and the mobile Teams experiences.

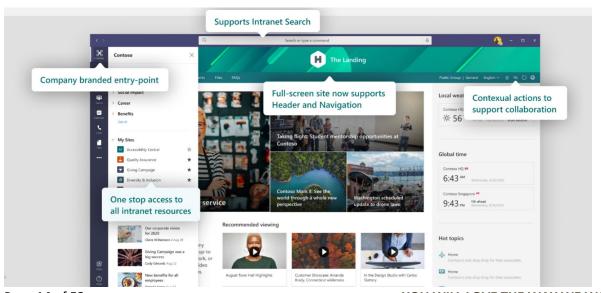


Incorporate & Leverage the Microsoft Viva Experience

When we think of Intranet design, we first think of how to bring the Intranet, its resources, and its services to the user where they are, in the apps they already use such as Microsoft Teams, Outlook, and even the Office Applications like PowerPoint and Word. Today, navigation experiences can do exactly that like those within Microsoft Viva Topics and with Microsoft Viva Connections.

Microsoft Viva Connections

The Microsoft Viva experience brings the Intranet into Microsoft Teams so that things like custom global navigation experiences can be leveraged directly within Teams, or so that a Teams App bar experience can provide a quick reference to key links and resources:



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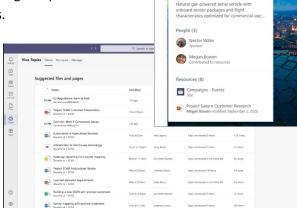
This is not limited to the desktop experience. The mobile experience via a Resources section also provides pinned resources, recently opened, simplified global navigation, your bookmarked or followed sites, your yammer communities, your video playlists/watchlist, and more.



Microsoft Viva Topics

Imagine navigation dynamically displayed in the context of the places a user already works, such as in an Outlook message thread, a Teams IM chat, or when reading a News article in SharePoint. In each of these scenarios, a topic can become a way to navigate and learn more about that topic and explore the related resources, people, questions, answers, and digital spaces that relate to it. That is what Microsoft Viva Topics provides.

In this way, Viva Topics is incredible as it's always available, dynamic, and up to date. It also enables organizations to discover and publish new topics based on real discussions, content, and insights from within their Microsoft 365 digital workplace. What's more, topic pages and topic cards can automatically highlight up-to-date related resources curated and suggested by AI.



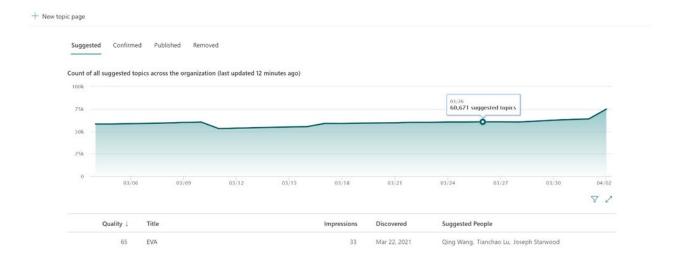
Singapore building update

This month there were great strides made in the dev Saturn team members.

Megan Bowen
Marketing Manag

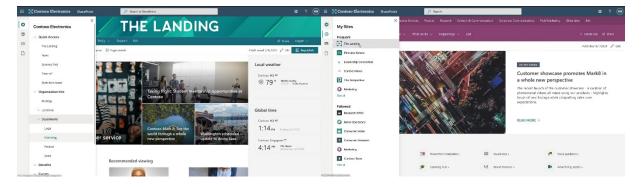
Saturn

Viva Topics represents a consistently updated, dynamic, and scalable way to tackle navigation. Since the usage of Viva Topics is tracked, you can use its insights to further improve the design of highly curated pages or resources such as key pages in the Intranet. It also supports extensibility in a few ways, including adding your own web parts that can further connect and improve navigation experiences for anyone exploring a topic page. While the global navigation and mega menu may help users navigate when they are in SharePoint and Viva Connections, it's the topic's experience that brings the Intranet or a "Topic Hub" to the user where they are, when they might need it.

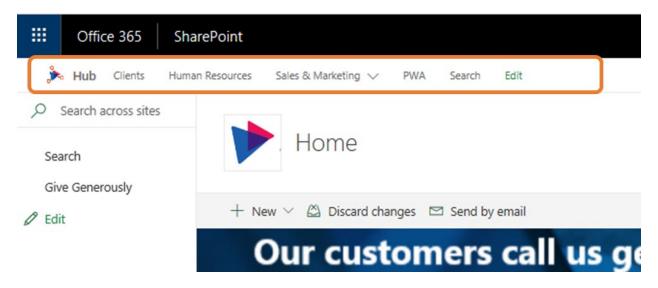


Embrace & Design With SharePoint's Navigation Capabilities

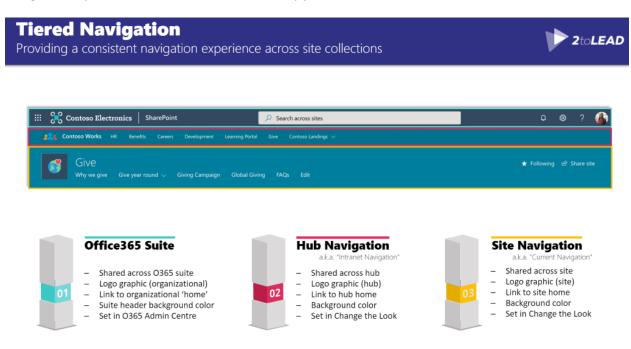
Out-of-the-box, the global navigation is limited to the Microsoft 365 App Bar. This navigation provides dynamic navigation like favorite sites or recent sites while providing a managed navigation experience that the organization can define (limited in real estate/navigation depth and the number of links). This supports up to 3 levels. It is based on the SharePoint home site, and supports audience targeting (as the other navigations do).



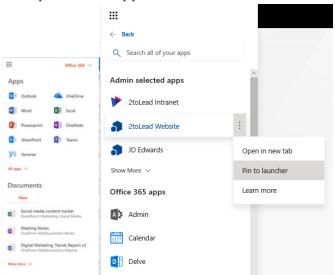
One of the advantages of SharePoint Online is that you can also <u>create hub sites</u>. These hub sites can have 'hub navigation,' which can be shared across site collections. This hub navigation can also be structured or managed term set based. This hub navigation can be an excellent solution for large business units that need to control their own 'global' navigation while complimenting the left-aligned organizational nav.



While the global or top navigation is often the main discussion point for an Intranet, sub menus and navigation components will often exist (such as tools or apps). Be careful not to develop some navigation capabilities that Microsoft 365 already provides out of the box.



Incorporate the App Launcher



There are standard components built into Intranets. One such component is to create a bunch of tool links for typical applications users need to access. This makes it easier for users to find the relevant sites, apps, and resources to do their job. While there are still situations where it may be necessary to have a custom component or roll-up of tool links, it bears careful consideration in Microsoft 365. Consider how some of these needs can be potentially met using the Microsoft 365 app launcher. The app launcher (unlike a tools/links component on the Intranet) is available throughout Microsoft 365. Whether the user is viewing another user profile or reading an email in Outlook Online, it is always one click away for the user.

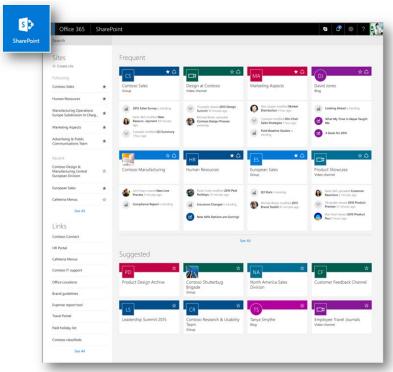
The app launcher contains links for apps that have been promoted or pinned from the My Apps Page. The My Apps page includes all the apps you get with Microsoft 365 and custom apps that you add from the SharePoint Store or Azure AD. Each user can personalize this app launcher by selecting what is pinned within the app launcher.

The app launcher can be used to provide users with access to key suite capabilities in Microsoft 365. Still, it can also be set up to include access to 3rd party SaaS solutions or key applications that Azure AD has been set up to provide single sign-on access.

Lastly, administrators can create custom app links that users can pin to their app launchers. These custom tiles can point to SharePoint sites, external sites, legacy apps, and more. In our example, 2toLead's Intranet app link is used to access our organization's Intranet.

This experience may not be what you are looking for when users create their links or the format and style you want users to have for navigating across tools and apps in your digital workplace. This feature gap is the ability to tailor or extend this launcher today. This is one of the main reasons you may still need a custom tools/links/apps component in your Intranet.

Incorporate the SharePoint Homepage



Users simply click the **SharePoint** tile from the Microsoft 365 app launcher to launch a redesigned, modern and responsive user experience with intelligence and site activities front and center.

Once in your SharePoint home, you'll see the sites and portals you are most active in alongside recommended sites per the Microsoft Graph and company-wide sites promoted by your company, the entire Intranet of an organization.

This gives you unified access to all of your sites—online and on-premises—and lets you navigate seamlessly through your Intranet, as well as catch up with activity across your sites with just a glance.

The most important thing to understand with the SharePoint page is how this will work with any Intranet site directory or site listing you may have been considering building. Since this is continually updated with new features, it makes sense to integrate and leverage this to support site navigation throughout the Intranet and broader digital workplace.

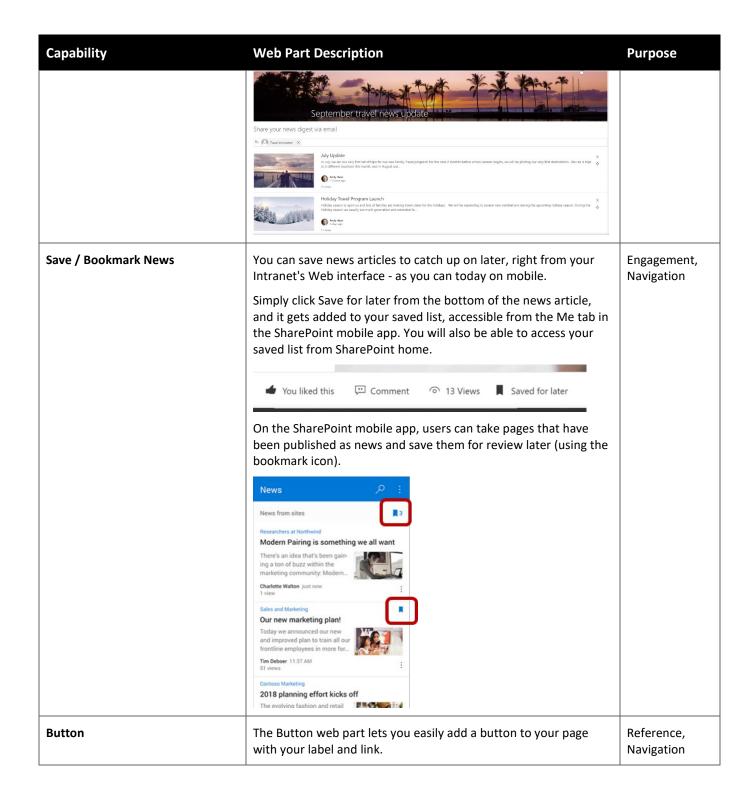
Leveraging SharePoint Online Web Parts

The web parts and features in SharePoint modern pages provide building blocks to create engaging and dynamic content. These are growing, regularly improving extensible (so you can build your own or add

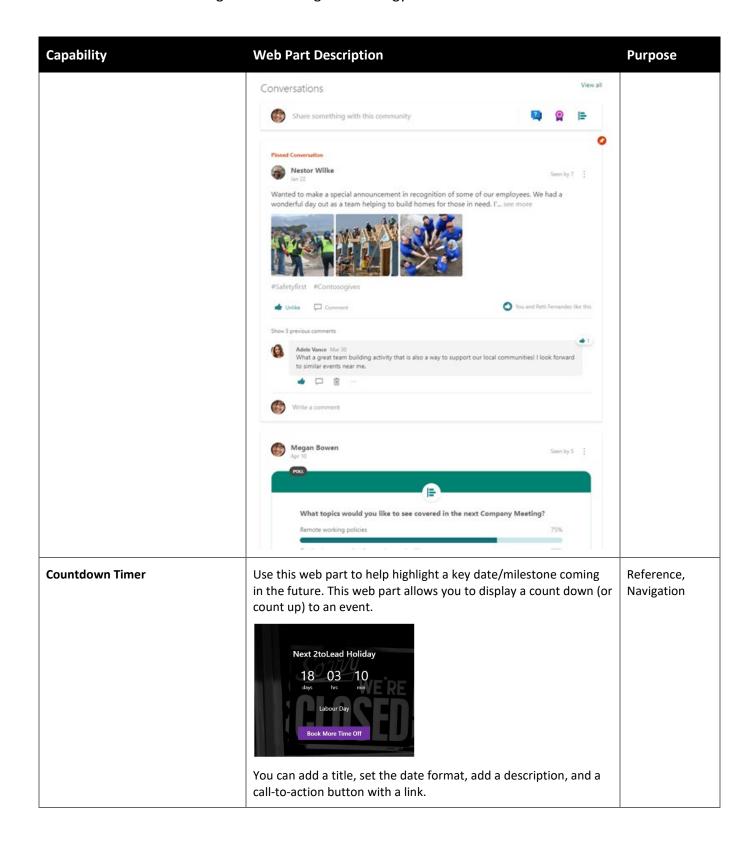
3rd party ones), configurable, and are easy to organize or layout. There are also many that focus on or can be used to improve navigation.

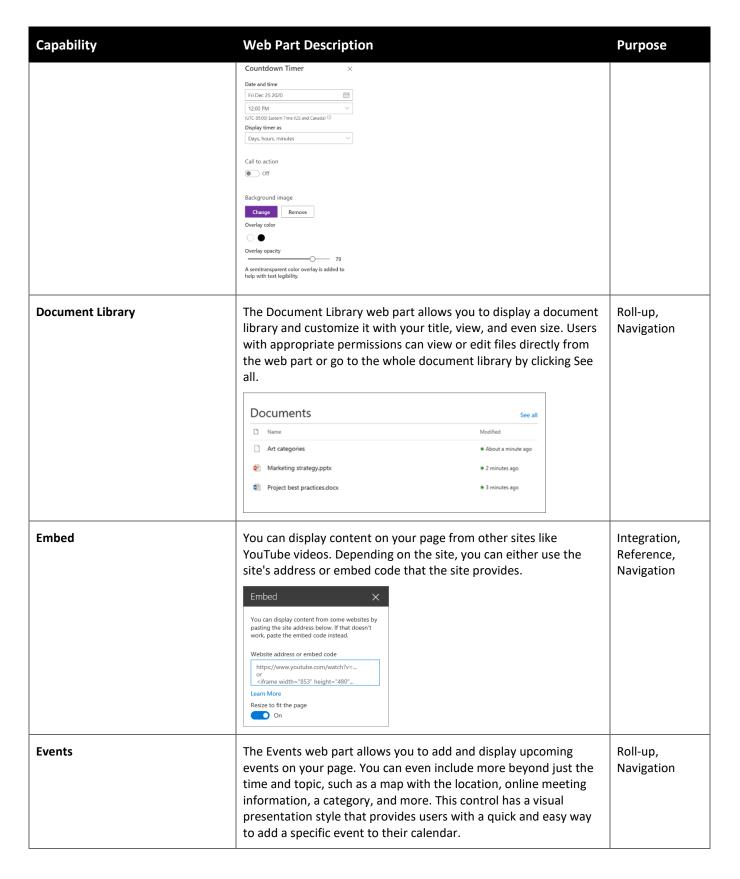
What follows is a summary of some of the capabilities currently available on SharePoint pages that can be used to improve navigation.

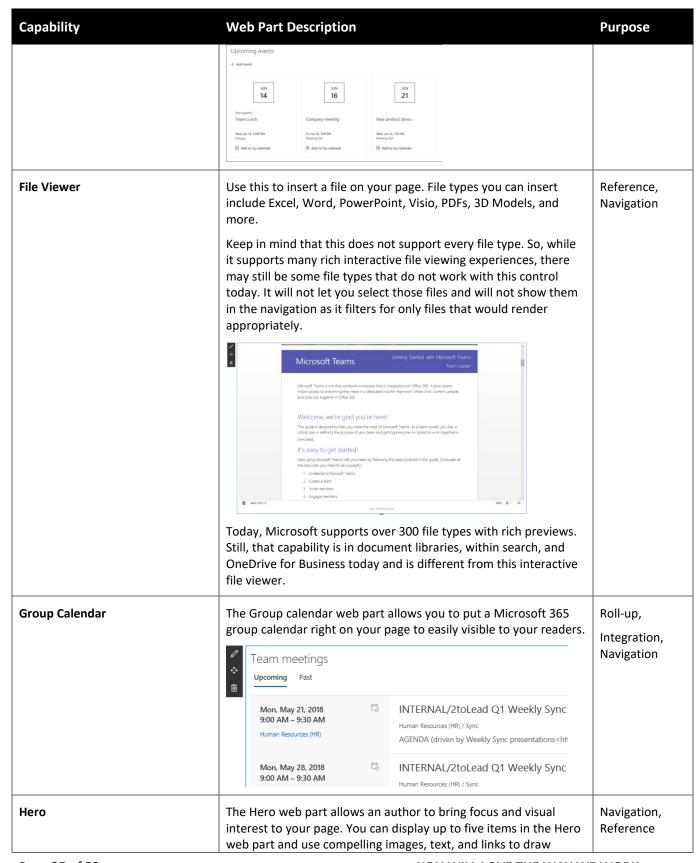
Capability	Web Part Description	Purpose
Improved Sharing	Users can share helpful articles or pages by email, including a link, thumbnail preview, description, and optional message to one or more people.	Engagement, Navigation
	Digital Center Of Excellence (EXAMPLE) Public group	
	+ New ✓ ☑ Send by email 🖘 Promote News post Copy of this news post	
Audience Targeting & Categorizing	You can better define what news articles, quick links, mega menu links, documents, and pages appear on your page experience by configuring what is visible to specific groups. Each person will have a unique experience that complies with what you wish them to view without creating multiple audience-specific sites. You can serve them all from within a more centralized location with a personalized, targeted experience. Audience targeting support is be enabled in news, pages, documents, and other web parts so that you can define and target who best to reach with content and site experiences.	Engagement, Roll-up
	Training in your region Training Amsterdam City Guide: Seattle City Guide: Seattle City Guide: San Francisco Pan Holme Citied 3 minutes ago City Guide: Saps ago City Guide: Saps saps City Guide: Sa	
Email A News Digest	Send news digest	Engagement, Navigation
	21047). Increase the reach of and combine select news articles into one consolidated email update. Select specific news items from the complete list of news articles, click Send news digest to send an email to a group or individuals with clean previews and links to the complete news articles.	



Capability	Web Part Description	Purpose
	Don't miss the launch event! It's an exciting time here at Contoso as we prepare to launch our latest drone software. Launch events will take place internationally at our U.S. offices and offices in Singapore. Watch the keynote, much on appetizers, check out the entertainment, and enjoy the celebration! Find your launch event	
Call to Action	The call-to-action web part allows you to create a button with a call to action for users. Add your call to action text here Button	Reference, Navigation
Conversations	If your organization has an active Yammer network (for example, www.yammer.com/2toLead.com), you can enhance collaboration by embedding Yammer conversations on your page. Keep in mind that this allows you to target a type of group conversations (top conversations, latest conversations, or targeted conversations) or a feed of discussion based on any group, person, topic, or home feed. This also now supports richer feed interactions like liking, @mentioning, adding content, and more.	Integration, Reference, Roll-up, Navigation





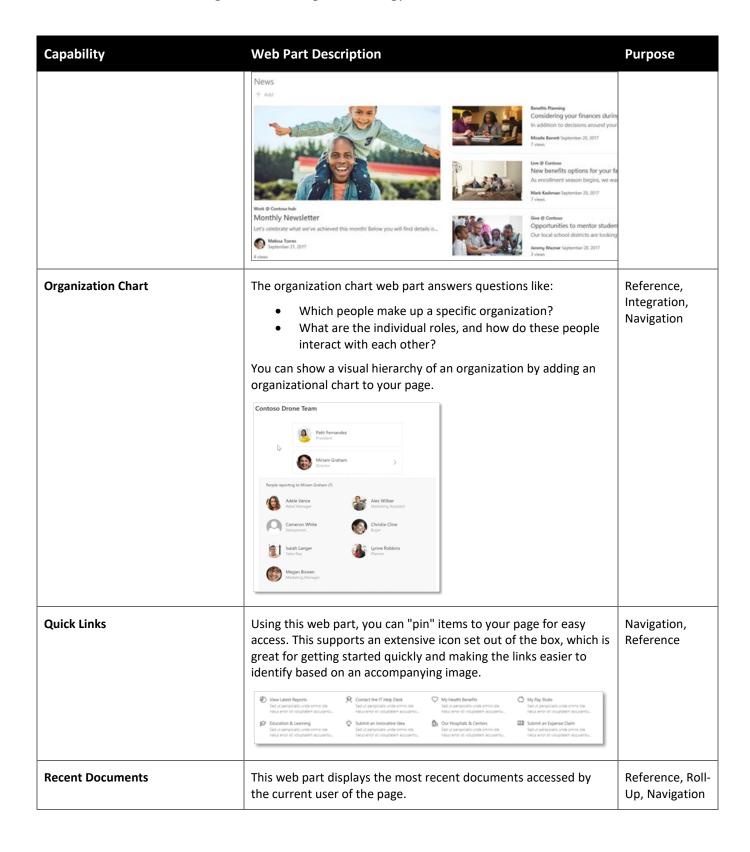


Capability	Web Part Description	Purpose
	attention to each. The Hero web part is included by default on Communication sites, but you can also add the Hero web part to other pages.	
Highlighted Content	Use this web part to dynamically display content based on content type, filtering, or a search string. You can also set the search scope to a site or site collection and sort the results. This is one of the most powerful controls provided today in the modern experience.	Roll-up, Navigation
	Highlighted Content 2318 Light Report This is a RECORD One MANABY Ches Manaby C	
Highlights	Use this if it is the only Yammer web part available to you (Yammer conversations is typically best), or to provide a quick overview of active conversations and a targeted portal to specific groups or conversations in Yammer.	Roll-up, Integration, Navigation

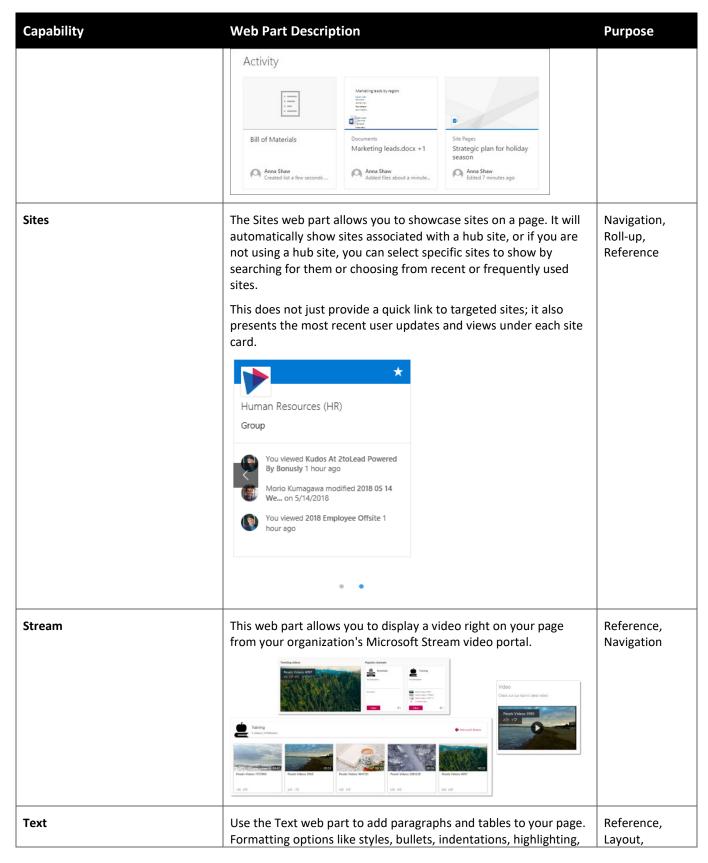
Capability	Web Part Descripti	on		Purpose
	Conversations Post to Yammer		View more	
	Megan Bowen 17 days ago What topics would you like to see covered in the next Company Meeting?	Nestor Wilke Last reply 28 days ago Wanted to make a special announcement in recognition 3 Images Adele Vance: What a great team building activity that is a	Johanna Lorenz Last reply 28 days ago What's our policy on working from home? #companymeeti Megan Bowen: Megan Bowen closed this conversation.	
	ó 🗇	△2 □4	ර 🗇 2	
	Nestor Wilke Last reply 31 days ago How are we responding to our strong competition? Megan Bowen: Patti responded to your question! https://web.microsoftstream.c			
Image	l e	can also allow author	ther from your site or rs to put the text as an	Reference
Image Gallery	Use the Image gallery web part to share collections of pictures on a page. Simply select your images with the file picker or drag them onto the web part. Once you've created your collection, you can drag and drop the images to reorder them as needed. Offsite Accommodation Pictures			Roll-up
Link	Use the Link web part to add a link to an internal or external page, video, image, or document.			Reference, Navigation
List	your title, view, and e	even size. Users can v ing See all. Keep in m	st and customize it with iew the list or go to the ind lists like document RLs.	Roll-up, Navigation

Capability	Web Part Description		Purpose
	Projects	See all	
	Title	Status	
	Project 1	Done	
	Project 2 Project 3	In progress	
	Project 4	In progress Complete	
	Toject	Complete	
My Feed	You can make your page or site more dynamic and relevant to individual users by adding the My feed web part. The My feed web part will show a mix of content from across Office 365, based on what's likely to be most relevant to the current user at any given time.		Reference, Roll- up, Integration, Navigation
	The feed is personal to each user. Different content. See also your feed is unique to you		
	The users will only see documents or other of shared with them or that they have access the documents stored in a shared folder in Onel SharePoint site that they have access to or a sent them in an email conversation.	o. These can be Orive or on a	
	The users might also see important meeting and can join these meetings directly from the	•	
	The content in the My feed web part for a good change depending on what page the web page the we		

Capability	Web Part Description	Purpose
	My feed See all Markio August invited you 8m ago Coming up in 20 minutes	
	Meeting with Contosos 400 PM - 430 PM 9 Building 32/1760	
	© Contoso FY2020 Join Teams meeting :	
	Marido August updated 8m ago Working Deck for FY20 planning Alan Brever's One 29 views	
	Open PowerPoint [] :	
	© Maricio August recorded a meeting 6m ago Customer Meeting for FY2020 8m ago 8m ago 10.24 10.24 10.24 10.24 10.24 10.24	
	29 views Open in Stream G: B Maricio August shared in email Bm ago Re Fabrikan review	
	Fabrikam meeting notes Alan Brewer's One 29 views	
	Daisy Phillips published Daisy Phillips published Daisy Phillips published Daisy Phillips pure Recruiting acrc North Africa ar Modern Life Modern Life	
News	You can keep your team in the loop as well as engage them with important or interesting stories by using the News feature on your page or site. You can quickly create eye-catching posts like announcements, people news, status updates, and more, including graphics and rich formatting. Keep in mind news can be both internal pages and external news links.	Roll-up, Navigation



Capability	Web Part Description	Purpose
	Recent documents Name Last accessed Strategy presentation about a minute Project memo 2 minutes ago Monthly analytics 2 minutes ago	
Saved for Later	With the Saved for later web part, each user can see the content they have saved when they view your page. Page authors can determine the source of Saved items that will show on the page: All saved items (to show all of the page viewer's items across SharePoint) or Saved items from this site (to show all of the user's saved items from the site on which the page is located).	Reference, Roll- Up, Navigation
	Saved for later A message from our CEO Patti Fernandez Customer Loyalty Program	
	DD_Northeast Ohio Regional Sewer District Contoso NextGen Camera Product Planning	
	Contoso HQ campus redevelopment, Novembe Volunteering opportunities - November 2019	
	Contoso Eagle launch and the future New benefits options for your family	
Site Activity	This web part automatically shows recent activity on your site, such as files uploaded, edits made, lists and libraries created, and so on. Just add the web part, and the latest activity is pulled in automatically.	Roll-up, Navigation
	This new capability is extremely useful for keeping teams informed as they collaborate on a site together.	

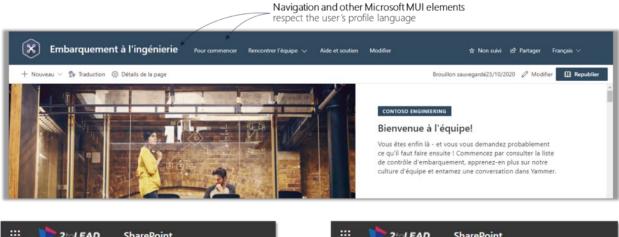


Capability	Web Part Description	Purpose
	and links are available.	Navigation
	When a user clicks the "" additional options such as table creation, indenting, highlighting, and more.	
	Normal text ▼ B / 및 ≣ ▼ ■ ▼ ∞ ··· Type your text here	

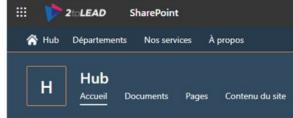
Navigation Translation

How navigation is translated is entirely dependent on the solution being leveraged.

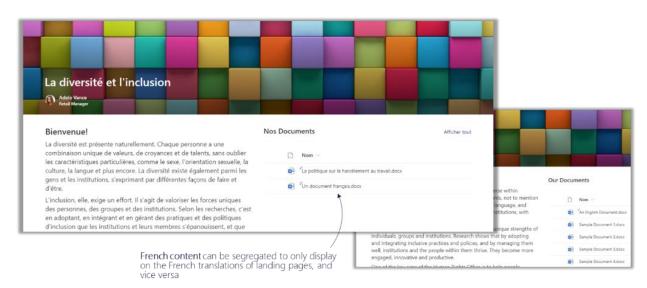
Out-of-the-box SharePoint navigation requires a user operating in an alternate profile language to edit the label, renaming it to the desired equivalent but then it supports cross-language navigation.



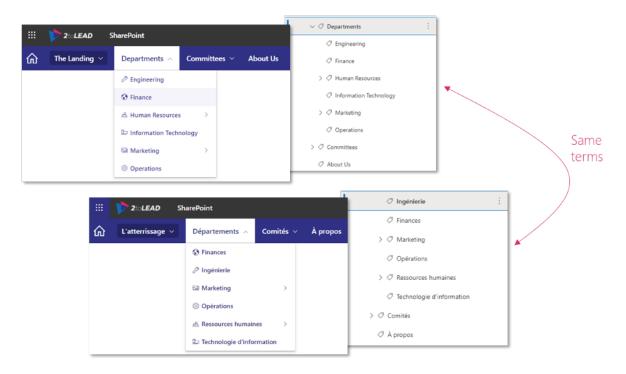




Navigating to French pages is a way to locate relevant/related French content in this model.



Another approach to consider could apply when you develop a custom global navigation. It's important to understand that means you need to plan your translation of navigation as well. A custom navigation



When the solution looks up the current user's profile language to determine which labels to display, it can adaptively display the values from the managed terms.

Why & When To Go Beyond Out Of The Box Navigation

Many organizations still feel that navigation is an area that merits customization. Some of the design imperatives we consider when building a custom navigation experience include:

- Drive a consistent experience by offering a persistent navigation experience
- Showcase brand identity by leveraging a consistent theme
- Enable relevancy by providing choice and personalization to end-users
- Reduce barriers for remote work by offering mobile-ready means to navigate
- Drive inclusion and comprehension by providing a multilingual experience
- Facilitate findability by allowing users to switch between portals easily



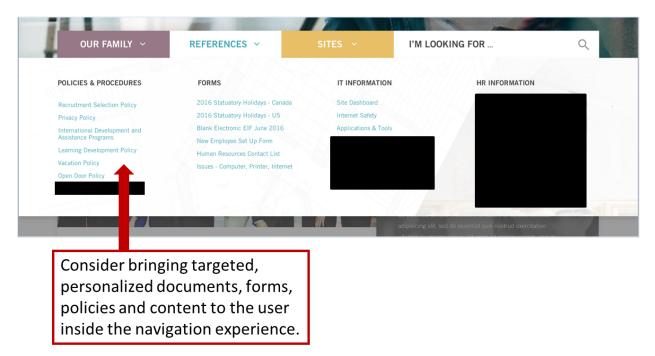
One pattern we have found that can work well is developing custom navigation powered by search. Suppose your navigation items often do not need to appear immediately. This approach could enable the flexibility of navigation that is always growing, can be easily personalized, and enhanced in various ways to improve the user experience. Since Microsoft 365 is constantly crawling new content, the only downside is the potential delay of content or navigation items displaying upon creation or modification. Awaiting re-indexing can be immediate or can take quite a few minutes.



 \triangle **NOTE**: It is important to have a site and page creation process that establishes key metadata for each site or page to improve search results and to allow for personalization and targeting of sharing the site or page. Search-based navigation is dependent on controlling the site provisioning process or page creation process and ensuring sites and pages are tagged appropriately to show up in various locations within the global or top navigation.

Since many Intranets customize their global or top navigation by enabling it to function like a multimega dropdown menu empowering this experience with search requires less effort. While common navigation elements like locations/offices, divisions, departments, and others rarely change, some navigation elements may frequently change, like tools or sites. Since sites themselves can be across the broader organization, it may be important to provide things like recent sites, favorite sites, or other ways to navigate site structures.

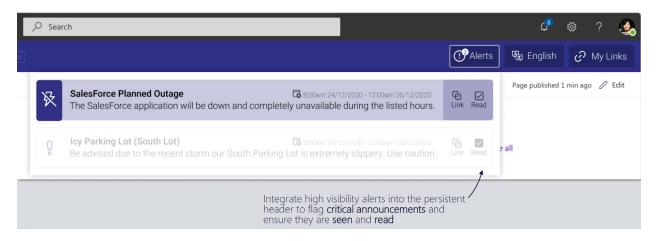
In the example below, the navigation didn't just link to policies and procedures. Still, it displayed specific ones based on automatically recommended policies and procedures targeted for that user based on what other users in their working group most popularly referenced.



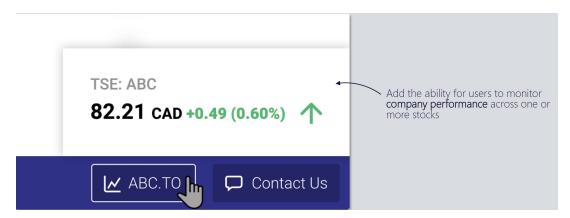
Navigating Announcements

The global navigation is an excellent place to add value so that it appears throughout the Intranet, SharePoint, or Viva Connections experience. In this way, it could be used to surface key alerts that can free up real estate in key pages like the home page while making it more broadly visible.

In the example below, we can use this custom experience to provide clear action or alerting.



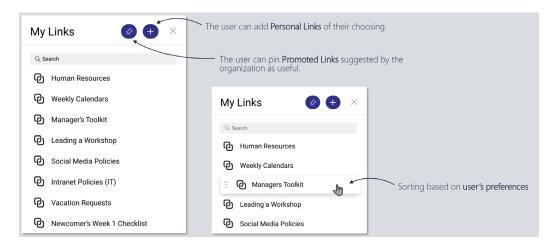
By using the global footer experience, we could add in insights from other systems or services. Like this simple example of a stock control.



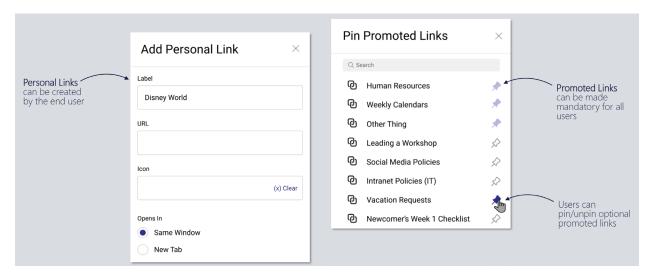
My Links Experiences

Navigation can be a powerful place to add richer personalization capabilities that augment gaps when the audience design or curated links don't quite match what matters most to a user.

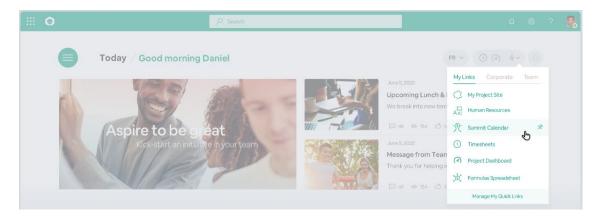
In this next example, we add control over your category of global links available from the header/navigation people already use.



It's important that things like My Links take into account organizational strategy where it gives more ways to provide commonly used or targeted links for the user, recommended links, or ways for them to order and potentially categorize them as users scale their personal links.

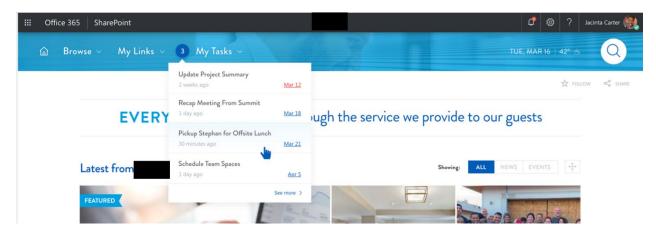


The design used for My Links is often not limited to match OOTB styles and can match your brand or preferences as well:

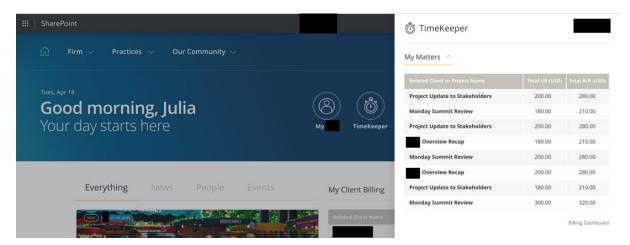


Integrated Experiences

As an example, this organization has heavily leveraged Planner tasks. Those tasks were important enough that integrating them directly into the navigation experience both introduced new Planner users (with a tailored message) and helped existing users navigate key outstanding items.



In this example a law firm integrated important matter billing information (and the actions to add/adjust time) to the global header for a quick win navigation and integration experience.



Navigation Guiding Learning

Because the navigation experience is consistently available on every page, it provides a great opportunity to integrate key onboarding, learning, or introductory experiences across the digital workplace. When the user navigates to a key landing page for the first time or opens up the newly released Intranet, you can use the navigation to guide the user through key things to learn, understand, or pay attention to.



Navigating the digital workplace for most organizations stops at the investment in an effective global navigation design. We have relied on the effective implementation and design of a global set of experiences throughout most of the given examples. One experience that we haven't addressed is how to manage the growing number of digital locations a user will work in.



For many organizations, an individual user may have access to hundreds of Microsoft teams, SharePoint sites, dozens of Yammer communities, collaboration environments in specialized tools, or fragmented services such as those in Workplace from Facebook or in Confluence Wikis etc.

Keep in mind that even the Microsoft stack is often fragmented, with many organizations still having a significant number of sites in legacy SharePoint Server environments or across

Microsoft 365 tenants. How can a navigation experience be designed not just for curated, targeted, and personalized links but for navigating all of the spaces that matter to a user?

P

Solving Workspace Navigation Challenges

While organizations often invest in excellent global navigation for their Intranets, they are almost always curated and manually managed. It doesn't scale across all the digital workspaces users work across on a day-to-day basis.

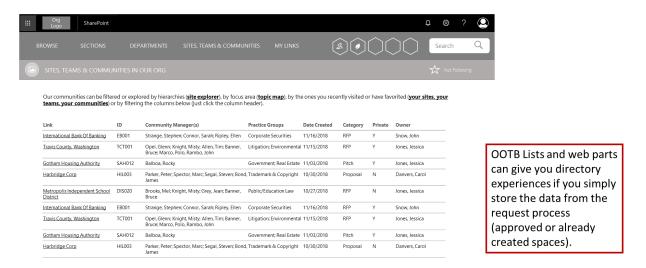
Megamenu layouts enable us to organize better and showcase the related content and sites based on topic categories and headings. What's more, they allow for a little more scale by including audience targeting. But they cannot come close to an effective solution for the hundreds or more likely thousands of Teams, Sites, Communities, and digital workspaces in your environment.

Instead, the optimal pattern for solving the digital workplace sprawl navigation challenges can be summarized in a single experience—that of an effective digital workplace directory.

Why is the directory such a good experience after all these years? Because it is a dedicated experience focusing on helping a user navigate information with the support of the organization, metadata, and user-led filtering.

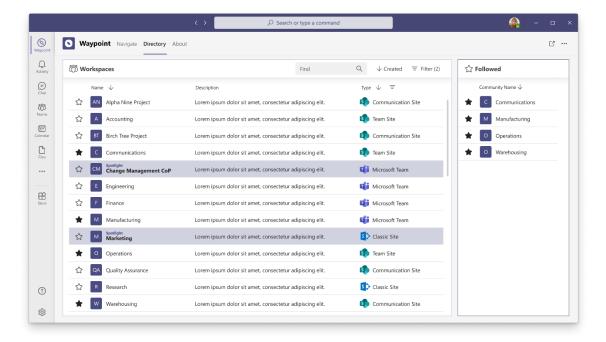
As an example, let's say an organization they have many communities that exist. These communities could be public ones on LinkedIn or Facebook, or they could be internal only ones on Yammer, in Teams, or other enterprise platforms. In that organization investing in a directory of communities might be a highly valuable navigation investment.

Below is a simple mockup of a filtered community directory experience based on Microsoft lists' out-of-the-box SharePoint page. These directories don't have to be highly custom and can be implemented by any content steward who wants to improve navigation.



Whether you use an out-of-the-box style design, a custom directory experience, or the incredible third-party directory solutions in the marketplace, they all must support the metadata relevant for helping users navigate that directory.

This doesn't need to be localized for a particular category of digital spaces such as communities. It can be used as a comprehensive way to enable any user in an organization to navigate the vast digital ecosystem of digital spaces that exist. These broader digital workplace directories are key resources that users depend on when a more structured and comprehensive navigation experience is needed.

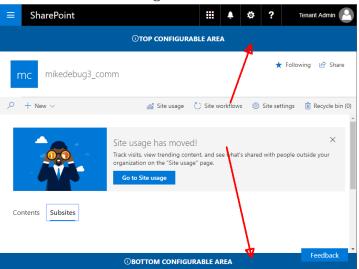


It doesn't have to be limited in where it appears to a digital workplace directory experience. As an example, if the directory was presented in a web part like the one pictured above, it could be added with pre-filtering to appropriate locations throughout the digital workplace. Are you looking at the HR departmental portal? At the bottom of the home page for HR, perhaps a pre-filtered view of the directory where "department = HR" is shown.

There are other important concepts in good digital workplace directory design, such as the value in spotlighting or styling the directory to call attention/visually differentiate your workspaces. At the same time, this isn't limited to Teams, SharePoint sites, and Communities. It can be used to support workspace navigation across SharePoint Server or other environments that are not in Microsoft 365 today, such as Facebook Workplace, Confluence, or any number of other enterprise systems.

Don't forget that digital space and what it represents have no limitations. While you may list all the Microsoft Teams, you could also purposefully abstract and display an important "Shared Channel" from a Microsoft Team or an important "Folder" from SharePoint, and it would just need an icon/type and would still be potential as relevant for having a quick and easy way to navigate to a 'digital space' that matters for that user.

Modern & Classic Navigation



While Modern sites have a navigation menu via hub sites that gives you the ability to create a navigation that can be used across site collections, it has some limitations. It doesn't work across your classic sites today, if you have more than one hub site, you can't have consistent navigation across those sites as easily, and the OOTB navigation control is also quite simple. It doesn't support search-based navigation, advanced personalization like My Links, or content roll up into the navigation itself, which are all patterns used in many intranets today to improve navigation.

For most organizations investing in a custom global navigation that goes across your entire environment can be extremely useful. When creating a custom global navigation menu, you should base it on client-side/JavaScript code and implement it within SharePoint modern sites' top configurable area. This can then be used in classic sites (since it's just code you can add) so that you have a consistent global navigation experience across all sites (classic and modern).

This should use a subtle and small initial layout to use less of the modern pages' real estate as it will push the content of the page downwards.

Conclusion | Take Navigation To The Next Level

Navigation provides the foundation for hundreds of other improved experiences and solutions and amplifies other digital workplace investments. Navigation is the most important driver for digital workplace success outside of effective technology selection and deployment. It is also one of the easiest parts of the digital workplace to enhance.

Inadequate navigation may occur in every Digital Workplace from time to time. Still, with the right approach and investments, your organization can adapt to navigation challenges over time and have a much more resilient and effective experience that helps users more easily get what they need when they need it.

The issues outlined in this eBook can be resolved in a timeframe of weeks or months, even the largest organizations. It can be resolved in a phased approach, starting with out-of-the-box and low to no cost technology solutions – many of which you already own. You will begin seeing immediate improvements after resolving some of these issues. It is equally important to maintain/review them long-term as the digital landscape is constantly changing, as is Microsoft 365.

You are not alone.

Use the community, resources like this, partners like ourselves, and vendors that all address gaps in navigation. Don't tackle navigation challenges by only using perspectives and expertise within your organization.

Tackling these issues with services support from an experienced partner is highly recommended. While this eBook is a great resource and hopefully had actionable ideas and insights for you, it is only the tip of the iceberg. There are many things to understand/know to establish, enhance, or empower the best approach to managing, enhancing, and improving digital workspace experiences in your organization.

Our Other Resources

A few of our popular (and comprehensive) whitepapers:

Microsoft 365 Intranets: What You Need To Know

This <u>160+ page whitepaper</u> has everything you need to know to successfully leverage Microsoft 365 Intranets and Digital Workplaces and amplify internal communication and collaboration to new heights.

Core Whitepaper Topics

- Understanding Microsoft 365 Communication and Collaboration Tools
- Benefits of a Microsoft 365 Intranet and Digital Workplace
- o Best Practices Across Technology, Design, and Leadership

Most Common SharePoint and Teams Sprawl Issues and How to Find Them

<u>This eBook</u> covers 8 of the most common sprawl issues organizations face today. These issues plague organizations everywhere, and solving them is crucial to increasing employee time and cost. Not only will you gain insight into the ways you can solve these issues, you will also learn why these issues matter to both IT and end-users.

Core eBook Topics

- Understanding Digital Workplace Sprawl
- o The Most Common Sprawl Issues and How to Solve Them

SharePoint Migration

This <u>70+ page whitepaper</u> has over 100 different questions that your organization should be able to answer, your migration vendor should be able to answer, and your migration partner should be able to answer, along with essential insights you should consider.

Core Whitepaper Topics

- Business Drivers For Migration
- o Migration Planning, Migration Strategy & Migration Roadmap Planning
- o Risks To Success

External Sharing With Office 365: What You Need To Know

This <u>30+ page whitepaper</u> outlines all of the key decisions and how to make them when it comes to enabling external sharing in Office 365 and when/where you may want to configure or extend those capabilities.

What to expect

- External Sharing Decisions & Guidance
- External Sharing & External User Roadmap

Measuring the Business Impact & ROI of Office 365

This <u>60+ page whitepaper</u> outlines many key considerations around how to measure the impact Office 365 has on a business while also outlining how Office 365 provides effective reporting capabilities today.

What to expect

- Understanding & Aligning Business Objectives
- o Business Impact & ROI By Office 365 Capability Mapping
- o Business Impact & ROI Calculation & Measurement Examples

Driving Office 365 Adoption & Usage: What You Need to Know

This <u>70+ page whitepaper</u> outlines all of the key considerations when planning and improving Office 365 technology and end-user adoption.

What to expect

- Driving Adoption Best Practices
- o Comprehensive Guidance On Building An Effective Adoption Campaign
- Adoption Activities Checklist

Many other great resources and samples can be found and are regularly posted on our resource site at http://Office365Resources.com.

About 2toLead

2toLead has been labeled as a generous Microsoft consulting company by its clients and employees. 2toLead employs trusted, passionate and experienced consultants who work hard to solve the most challenging business and technology problems that face our clients.

Awarded Experience, Here to Help

Microsoft 365 out of the box is already a massive step in the right direction, but the advantages can be astronomical with the proper guidance. We would love to be the consultants who help guide you to your optimal digital workplace. Our team is ready to show you that "You will love the way we work. **Together.**"

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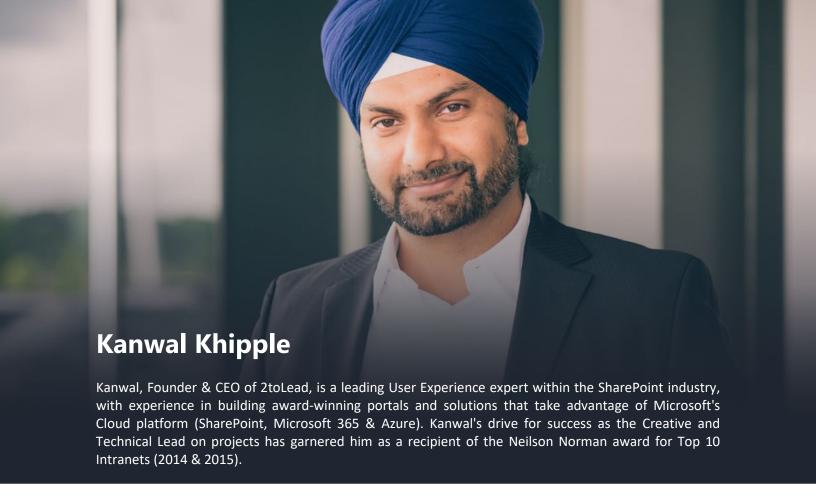
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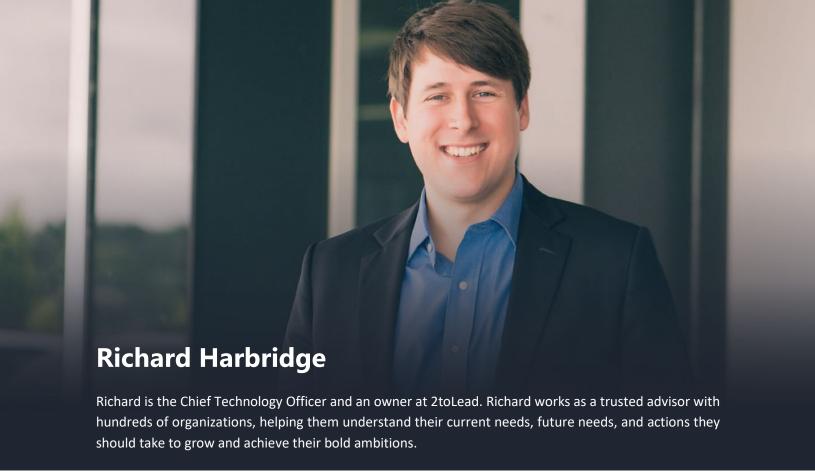
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Feel free to reach out to him if you'd like to discuss your project, want to run an idea by him, or just want to reach out to a friendly technologist.







Richard remains hands-on in his work and has led, architected, and implemented hundreds of business and technology solutions that have helped organizations transform - digitally and organizationally. Richard has a passion for assisting organizations in achieving more, whether it is helping an organization build beautiful websites to support great content and social strategy or help an organization leverage emerging cloud and mobile technology to better service their members or the communities they serve.

Richard is an author and an internationally recognized expert in Microsoft technology, marketing, and professional services. As a sought-after speaker, Richard has often had the opportunity to share his insights, experiences, and advice on branding, partner management, social networking, collaboration, ROI, technology/process adoption, and business development at numerous industry events worldwide. When not speaking at industry events, Richard works with Microsoft, partners, and customers as an advisor to business and technology, and serves on multiple committees, leads user groups, and is a Board Member of the Microsoft Community Leadership Board.



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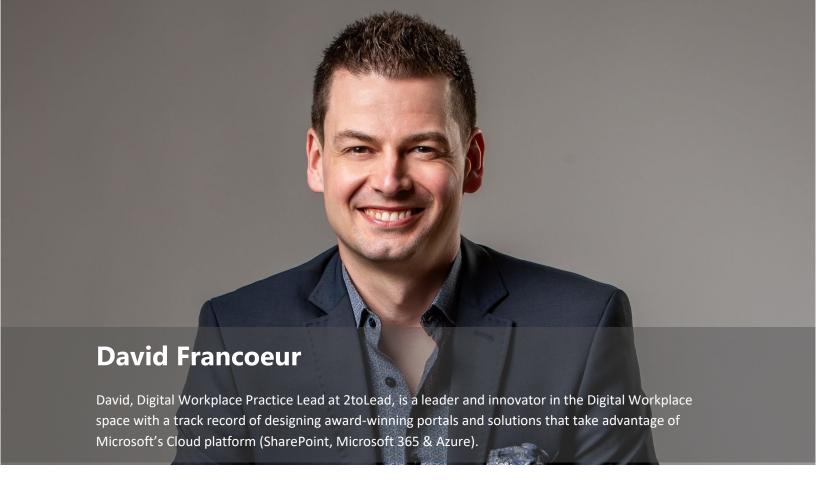
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David shares his expertise via speaking engagements and written publications where his perspective allows him to blend his strengths in user experience and design with deep technical expertise. Most recently, David has been grateful to be named a recipient of the Neilson Norman award for Top 10 Intranets (2020) and the Diamond Award from the CUNA Council (2018).

Staying abreast of industry trends, best practices, platform capabilities in a constantly evolving cloud environment, David leverages his practical experience spanning industries and corporations from startups to Fortune 500 companies, to tailor recommendations to meet evolving user needs. With a real passion for delivering experiences that are both robust and flexible, David is deeply motivated to build new things that make the workplace, and more importantly its stakeholders, more effective. He firmly believes that while tools can go a long way, but implementations tend to fail without research, analysis, strategy, and training. An analytical thinker with roots in the study of History, David has experience in both public and private sectors, including roles as an architect and principal consultant at both product and service-oriented consulting firms. Bringing the necessary skills and invaluable experience to the table, David strives to bridge the gap between people and technology.



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JUST THE BEGINNING

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