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# INTRANET PLANNING & GOVERNANCE

## From Strategy to Content Management

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# TOBY WARD

## Founder, Prescient Digital Media

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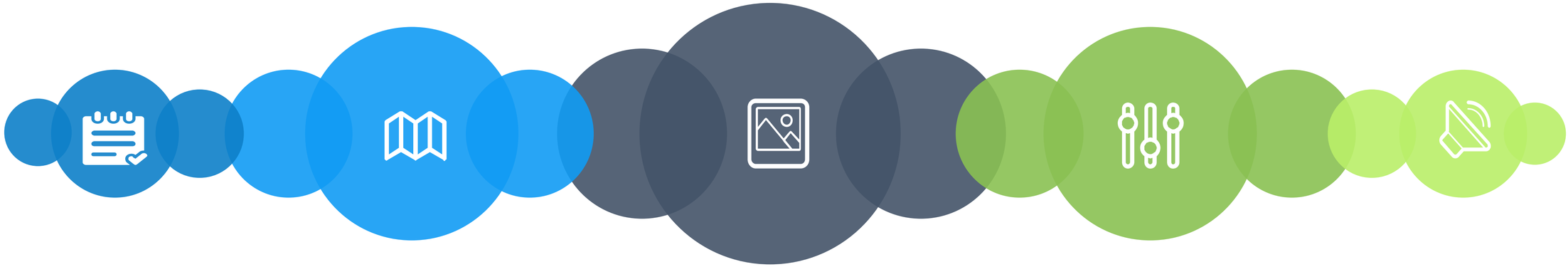
# Concept to Live

## Complete Solution



**Everything required to go redesign and launch; from concept to live. We plan it all, and work with your internal teams to deliver.**

ASSESS PLAN DESIGN BUILD RUN

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# Clients

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# From Concept to Live

## End-to-End Services

### Assessment

- Stakeholder engagement
- Constituent analysis
- Focus groups
- User surveys
- Content analysis
- Technical ecosystem assessment

### Planning

- Strategic plan
- Solution roadmap
- Engagement plan
- Governance model
- Content management plan
- Social/collaboration strategy
- Technical architecture

### Design

- User experience design
- Information architecture
- Dynamic wireframes
- Navigation flows
- Taxonomies

### Implementation

- Development
- Configuration
- Integration
- Content migration
- Desktop, mobile.
- Technology agnostic.
- Expertise in SharePoint

### Operations

- Content creation
- Operations management
- Change management
- Solution product management
- Analytics
- Search optimization.

**Listen. Understand. Deliver.**

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# The Digital Workplace

It's people and process, not merely technology

### Planning
Every intranet must have a strategy with measurable goals

### Governance
A detailed & documented ownership & management model

### Content
Content is king, and what people seek and need

### Resources
Adequate staffing, budget, and change management

### Technology
Technology is an enabler, not an outcome

### Search
The digital glue that binds together the digital workplace

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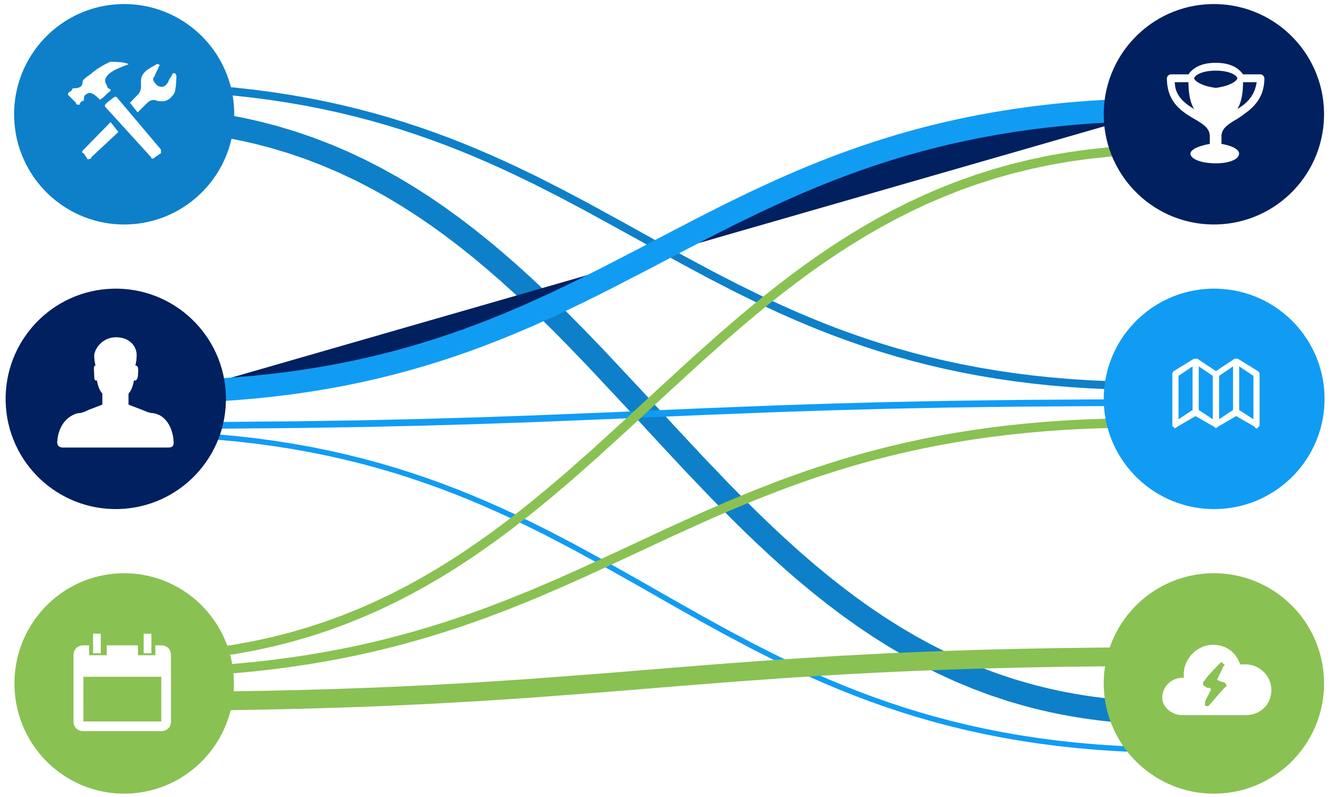
# Digital Transformation

People, process, technology



## People

**Transformation begins with people, and engages at all levels, all the time**

## Process

**Governance, policies, processes**

## Technology

**Technology is an enabler and supports people and processes, not vice versa**

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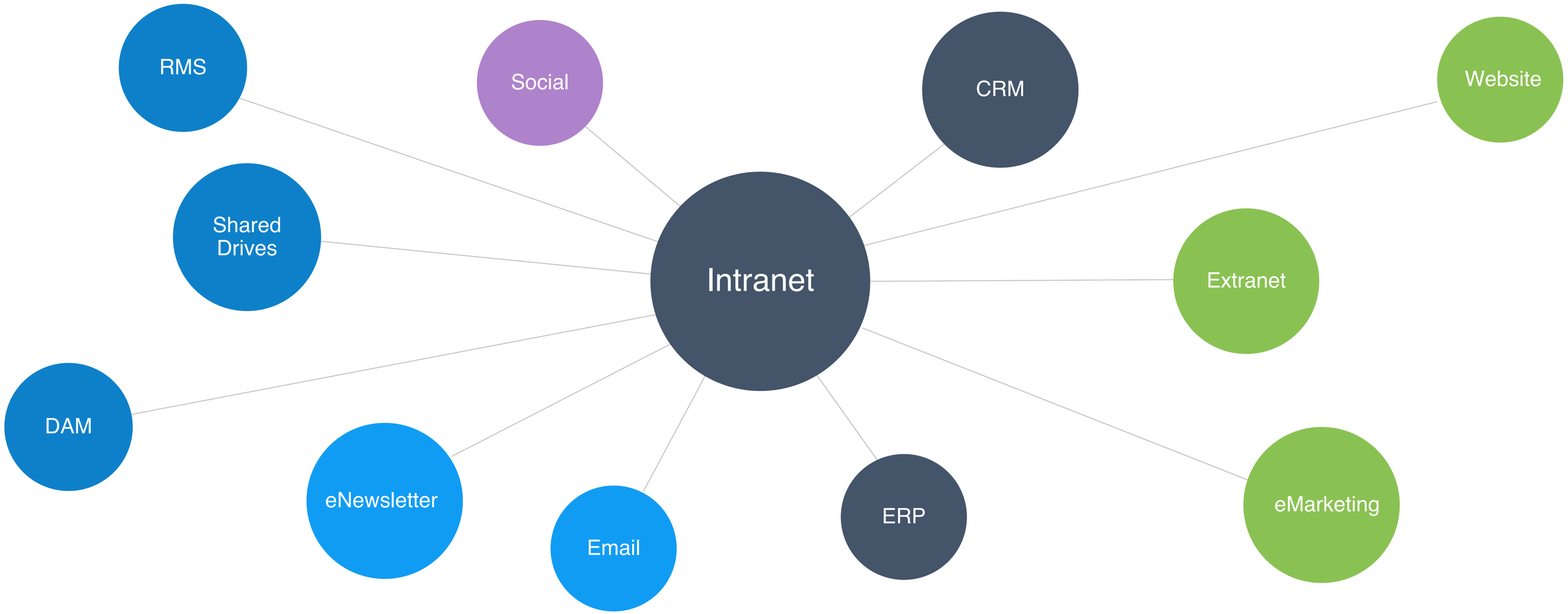
# The Intranet Gateway

## Gateway to the Digital Workplace

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# Typical Intranet



- “The search engine sucks.”
- “I can’t find anything.”
- “I just use email.”

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# Think About…

- Does everyone know who owns the intranet?
- Do you have detailed content policies?
- Do you have detailed job descriptions for content creators/publishers?
- Does all content have an expiry date?

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# Process, Not A Project

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# Methodology

## The First Dedicated Intranet Methodology

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# Assessment

Document the current state & future need

### Heuristic Assessment
Review, analyze, score more than 400 intranet attributes

### Collaboration readiness
Research and analyze appropriateness & readiness for social

### Business Requirements
Understand, document, analyze executive & staff requirements

### Benchmarking
Review, analyze and score leading intranets versus yours

### User Requirements
Understand, document, analyze employee requirements

### Findings & Recommendations
Detailed analysis of all findings and a host (100+ on avg.) of recommendations

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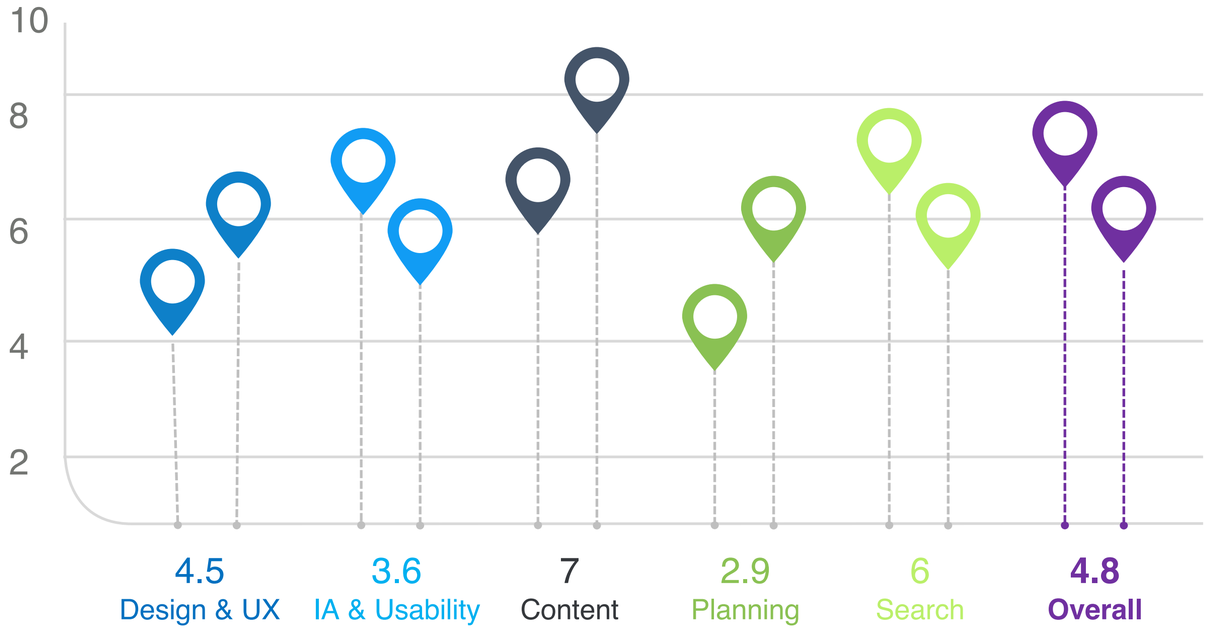
# Strategic & Heuristic Scorecard

Comprehensive scoring of 400+ attributes

## 4.5 / 10

Our complete, proprietary Strategic & Heuristic Intranet Scorecard analyzes, documents and scores more than 400+ intranet attributes and produces a final, overall score out of 10. This 'expert' quantitative scorecard can be used as a baseline KPI for tracking future performance, and/ or a baseline for benchmarking other leading intranets (gap analysis).

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# User Research

## Surveys, Focus Groups, Usability Testing

**6. What is your best idea for improving the Halton.ca website?**

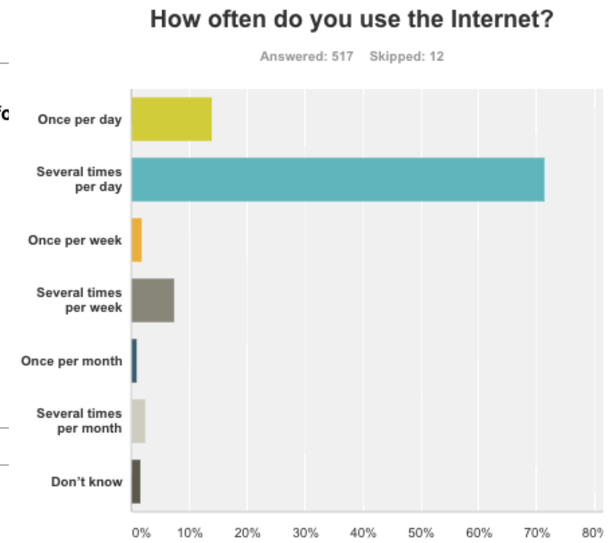
**7. Which of the following best describes your role fo**

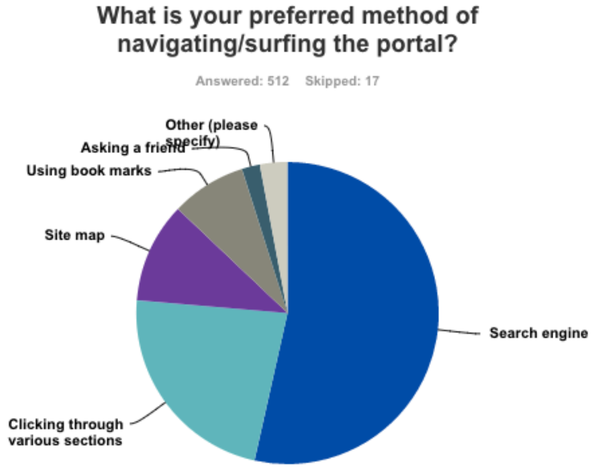
- Business
- Citizen
- Tourist / Traveler
- Halton Employee
- Media
- Contractor / Supplier

Other (please specify)

**8. What is your approximate age?**

- Under 18 years
- 18-34 years
- 34-50 years
- 50-65 years
- Over 65 years




| nswer Choices | Responses |
|---|---|
| Once per day | 13.93% |
| Several times per day | 71.37% |
| Once per week | 1.93% |
| Several times per week | 7.54% |

| Answer Choices | Responses | |
|---|---|---|
| Search engine | 53.52% | 274 |
| Clicking through various sections | 22.85% | 117 |
| Site map | 10.74% | 55 |
| Using book marks | 8.01% | 41 |
| Asking a friend | 1.95% | 10 |
| Other (please specify) | 2.93% | 15 |

Responses

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# Focus Groups

Story telling, content priorities, design concepts

**Content**
What do people want, expect?

**Tools**
What are most used, missing?

**Design**
How much color vs white space?

**Layout**
What should be on the home page vs internal?

**Technology**
Scrolling? Social?

**Navigation**
Preferred navigation: search vs clicking vs site map vs index

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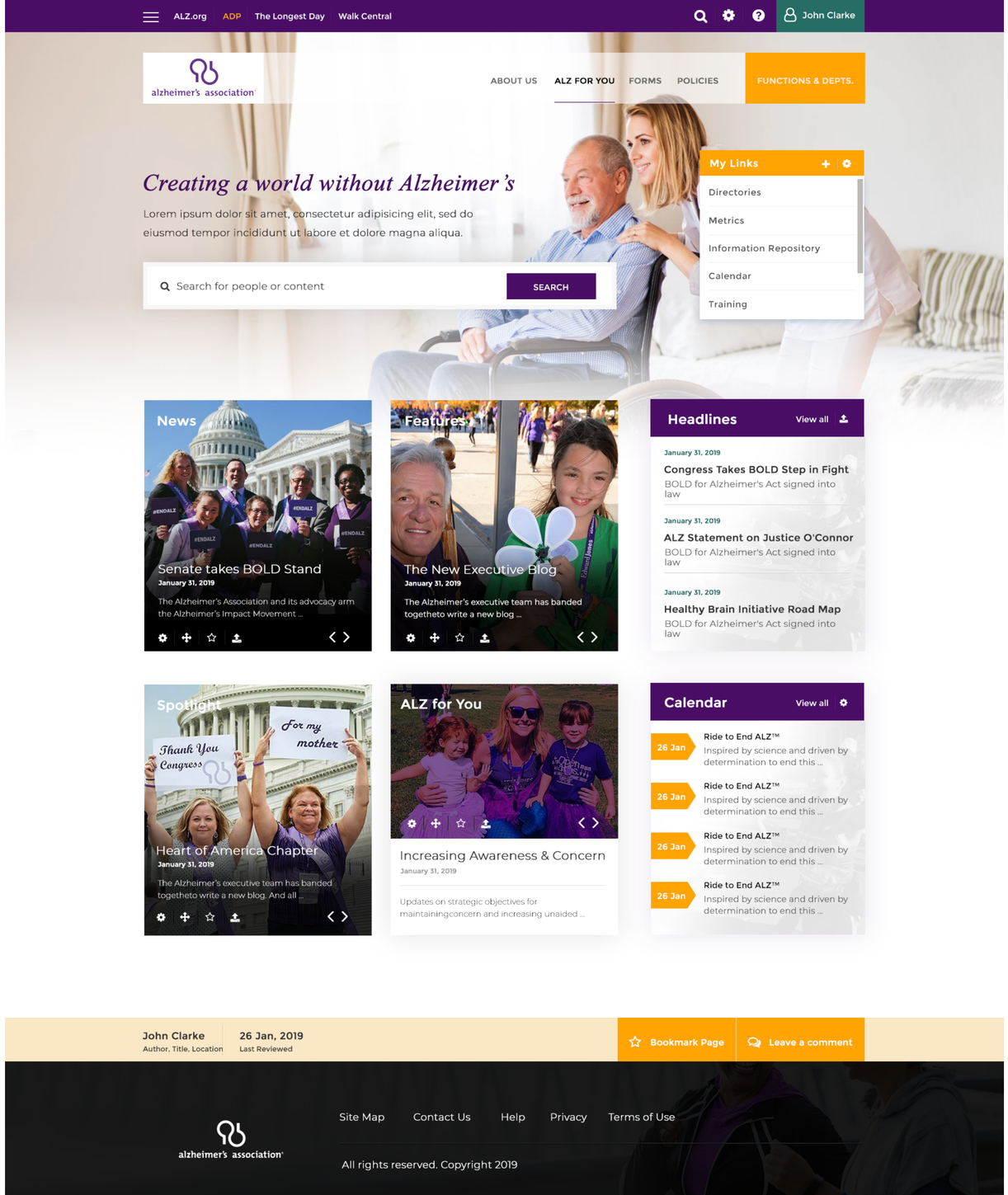


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alzheimer's association

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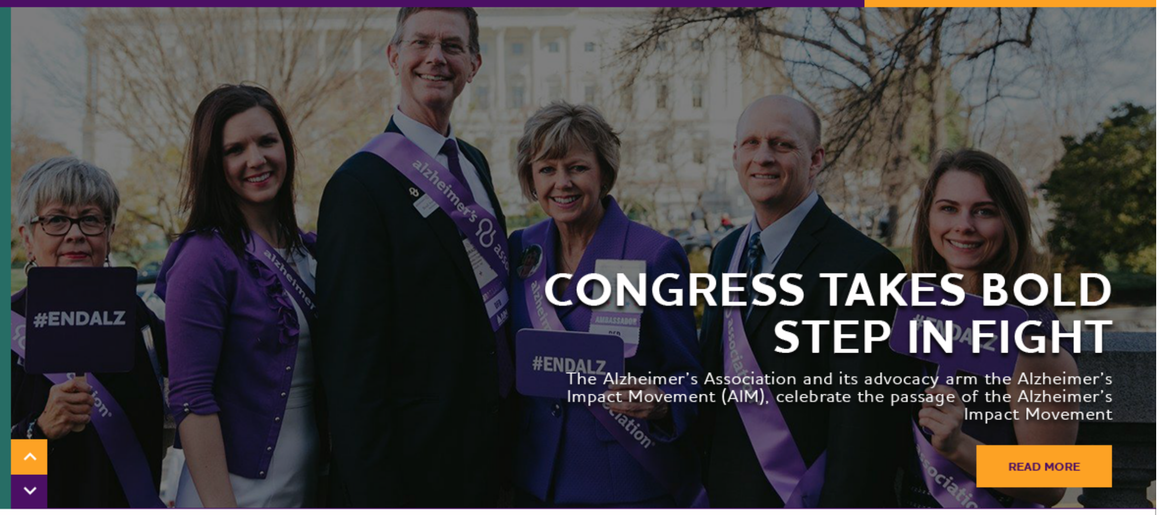
Add Links +




# CONGRESS TAKES BOLD STEP IN FIGHT

The Alzheimer's Association and its advocacy arm the Alzheimer's Impact Movement (AIM), celebrate the passage of the Alzheimer's Impact Movement

READ MORE

## NEWS

**Senate takes BOLD Stand**

The Alzheimer's Association and its advocacy arm the Alzheimer's Impact Movement (AIM), celebrate the passage of the Alzheimer's Impact Movement

1

## FEATURES

**The new Executive Blog**

The Alzheimer's Association and its advocacy arm the Alzheimer's Impact Movement (AIM).

1

## FUNCTIONS

**Increasing Awareness & Concern**

The Alzheimer's Association and its advocacy arm the Alzheimer's Impact Movement (AIM).

1

## HEADLINES

| | | |
|---|---|---|
| Feb 2, 2019. | **The Longest Day** | Planning & prep for June 21, 2019 |
| Jan 31, 2019. | **Congress Takes BOLD Step in Fight** | BOLD for ... |
| Jan 29, 2019. | **ALZ Statement on Justice O'Connor** | ALZ supports... |
| Jan 28, 2019. | **Healthy Brain Initiative Road Map** | ALZ and CDC ... |

## CALENDAR

| | |
|---|---|
| Jan 28, 2019. | Alzheimer Awarness Challange |
| Jan 29, 2019. | World Health Congress - Annual Reports in Berlin |
| Jan 31, 2019. | Awareness Challenge in Houston |
| Feb 2, 2019. | Annual Reports in New York |

Calendar

## SPOTLIGHT

**Heart of America Chapter**

The Alzheimer's Association and its advocacy arm the Alzheimer's Impact Movement (AIM), celebrate the passage of the Alzheimer's Impact Movement

1

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12:45pm, Thurs, March 31, 2019

Good Afternoon
Jane

ALZ.org | ADP | SHOP | The Longest Day | Walk Central | Jane Doe

SEARCH FOR PEOPLE OR CONTENT

SEARCH

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**ALZHEIMERS INSIDER**

MY LINKS

- Branding guidelines
- Jobs
- Metrics
- Logos
- Photos
- Topic Sheets

ADD LINK

## NEWS

**Senate takes BOLD Stand**
January 31, 2019

The Alzheimer's Association and its advocacy arm the Alzheimer's Impact Movement (AIM), celebrate the passage of the Alzheimer's Impact Movement

## FEATURES

**The New Executive Blog**
January 31, 2019

The Alzheimer's executive team has banded together to write a new blog. And all employees can comment.

## ALZ for You

**Increased Awareness & Concern**
January 30, 2019

Updates on strategic objectives for maintaining concern and increasing unaided awareness amongst the champions audience.

## HEADLINES

**The Longest Day**
Planning & prep for June 21, 2019.
January 31, 2019

**Congress Takes BOLD Step in Fight**
BOLD for Alzheimer's Act signed into law
January 31, 2019

**ALZ Statement on Justice O'Connor**
ALZ supports former Justice O'Connor in her fight
January 31, 2019

**Healthy Brain Initiative Road Map**
ALZ and CDC partner on the 3rd edition of the HBI
January 31, 2019

**The Longest Day**
Highlights, photos and video from last year's Day
January 31, 2019

**Congress Takes BOLD Step in Fight**
BOLD for Alzheimer's Act signed into law
January 31, 2019

VIEW ALL NEWS

## SPOTLIGHT

**Heart of America Chapter**
January 29, 2019

Smack in the middle of the country the Heart of America chapter is working hard to spread the word.

## CALENDAR

| | |
|---|---|
| Monthly Chapter Executive Call | JANUARY 28 |
| Flip Cup Tournament (MN) | JANUARY 28 |
| Alzheimer's Comedy Show (CA) | JANUARY 28 |
| Camel's Hump Challenge (VT) | JANUARY 28 |
| Holiday | JANUARY 28 |
| The Longest Day | JANUARY 28 |

VIEW CALENDAR

PAGE INFO: OWNER: Jane Doe, Title, Department LAST REVIEWED: January 15, 2019 Leave a comment Add To My Links

alzheimer's association

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HELP

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# Trends in employee engagement

## More listening, less sending

Continuous listening, feedback is valued and encouraged

## Measurement translated into action - fast

Continuous listening only makes sense if you value quick action

## More peer to peer, not just top down

Build and foster communities

## More personalization

Target comms by org, geo, role, tenure and more

## More visuals and video. Less text.

Use a multimedia approach to engage and inspire employees

## Focus on remote work

Lead, engage and utilize technology for targeted communications

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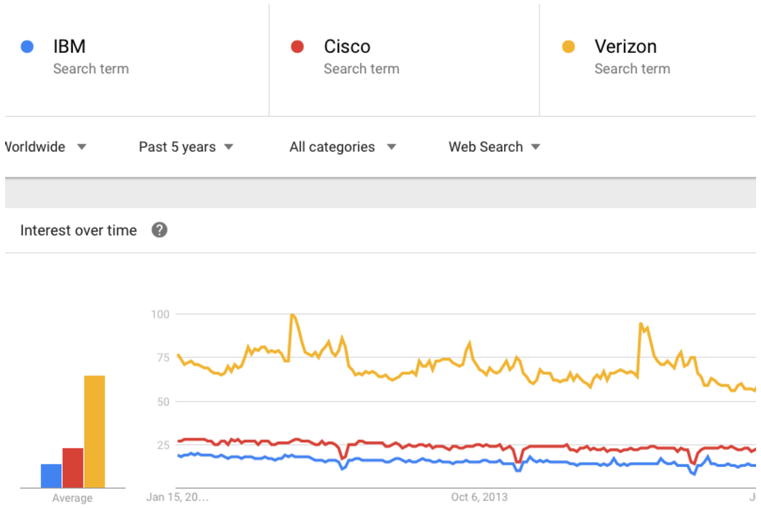
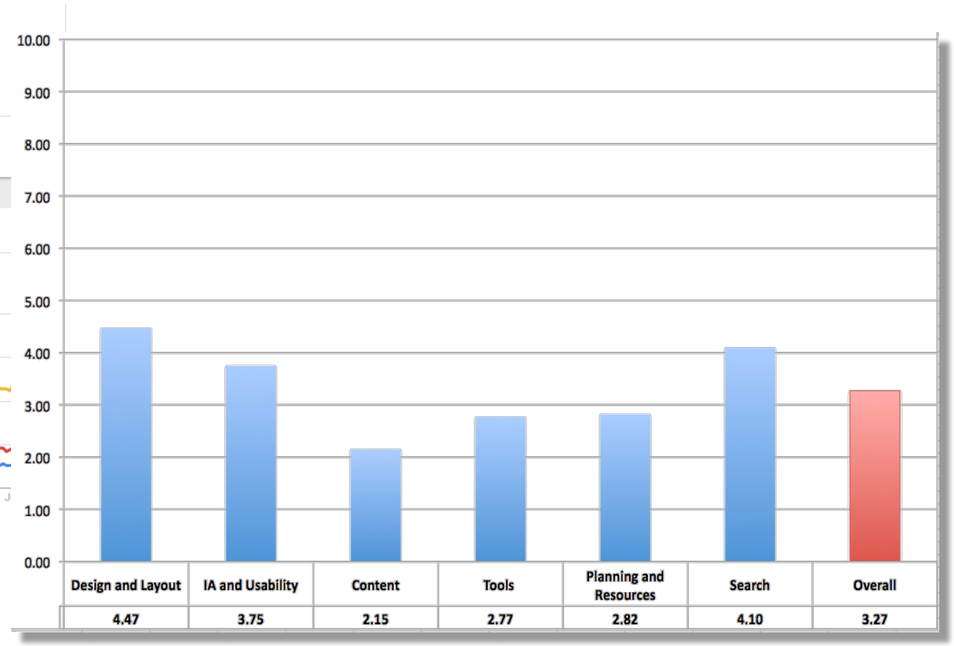
# Benchmarking

Detailed benchmarking of 2-3 intranets; or best practices review of up 5 intranets

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# Business Requirements

Six to Twelve Management Interviews

## Strengths

What works well, what should be kept, and enhanced

## Weaknesses

What works poorly, and should be eliminated or completely redesigned

## Opportunities

Biggest opportunities for improvement and focus in the next iteration

## Threats

Those threats or barriers to success that must be directly addressed

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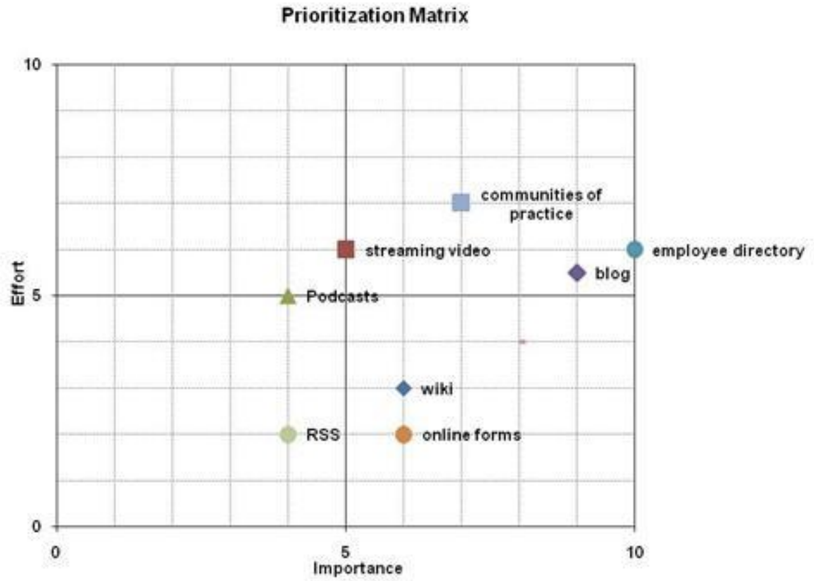
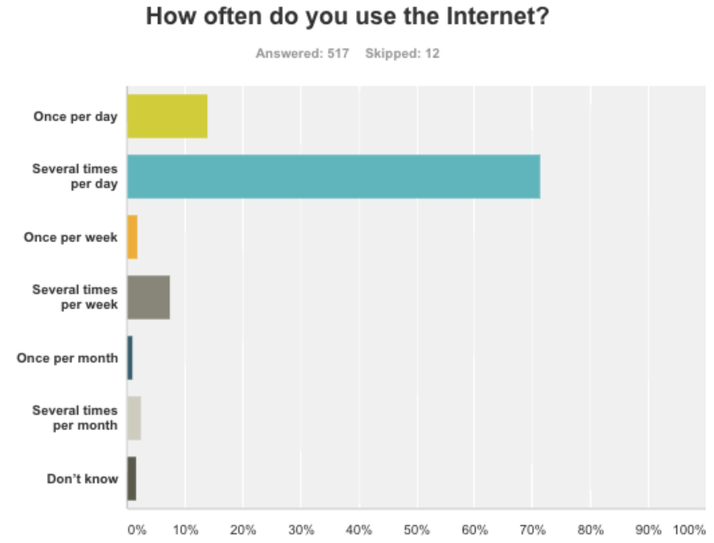
# Business Requirements Analysis



## 6-12 Stakeholder Interviews




| nswer Choices | Responses | |
|---|---|---|
| Once per day | 13.93% | 72 |
| Several times per day | 71.37% | 369 |
| Once per week | 1.93% | 10 |
| Several times per week | 7.54% | 39 |

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# Formal Scoring

Rating scores

**STAKEHOLDERS**

INTRANET OWNERS
& MANAGEMENT

**EXPERT**

PRESCIENT'S
FORMAL SCORING

**EMPLOYEES**

THE TARGET
AUDIENCE

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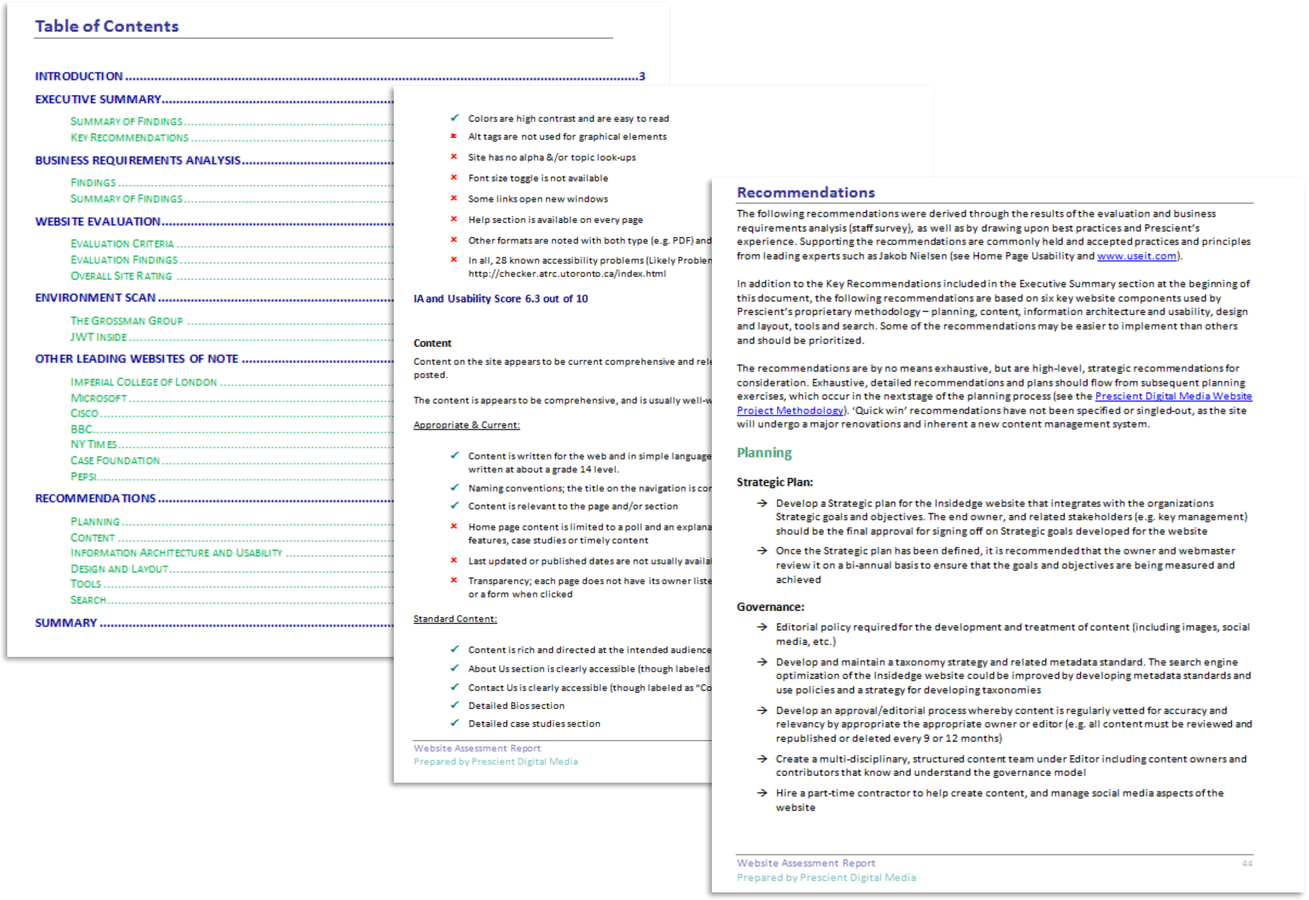
# Key Findings Report

## Gap Analysis, Findings, Recommendations



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Overall Site Rating .....
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Microsoft .....
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Pepsi .....
RECOMMENDATIONS .....
Planning .....
Content .....
Information Architecture and Usability .....
Design and Layout .....
Tools .....
Search .....
SUMMARY .....

✓ Colors are high contrast and are easy to read
× Alt tags are not used for graphical elements
× Site has no alpha &/or topic look-ups
× Font size toggle is not available
× Some links open new windows
× Help section is available on every page
× Other formats are noted with both type (e.g. PDF) and
× In all, 28 known accessibility problems (Likely Proble
http://checker.atrc.utoronto.ca/index.html

IA and Usability Score 6.3 out of 10

Content

Content on the site appears to be current comprehensive and rel
posted.

The content is appears to be comprehensive, and is usually well-w

Appropriate & Current:

✓ Content is written for the web and in simple language
written at about a grade 14 level.
✓ Naming conventions; the title on the navigation is co
✓ Content is relevant to the page and/or section
× Home page content is limited to a poll and an explana
features, case studies or timely content
× Last updated or published dates are not usually availa
× Transparency; each page does not have its owner liste
or a form when clicked

Standard Content:

✓ Content is rich and directed at the intended audience
✓ About Us section is clearly accessible (though labeled
✓ Contact Us is clearly accessible (though labeled as "Co
✓ Detailed Bios section
✓ Detailed case studies section

Website Assessment Report
Prepared by Prescient Digital Media

Recommendations

The following recommendations were derived through the results of the evaluation and business requirements analysis (staff survey), as well as by drawing upon best practices and Prescient's experience. Supporting the recommendations are commonly held and accepted practices and principles from leading experts such as Jakob Nielsen (see Home Page Usability and www.useit.com).

In addition to the Key Recommendations included in the Executive Summary section at the beginning of this document, the following recommendations are based on six key website components used by Prescient's proprietary methodology – planning, content, information architecture and usability, design and layout, tools and search. Some of the recommendations may be easier to implement than others and should be prioritized.

The recommendations are by no means exhaustive, but are high-level, strategic recommendations for consideration. Exhaustive, detailed recommendations and plans should flow from subsequent planning exercises, which occur in the next stage of the planning process (see the Prescient Digital Media Website Project Methodology). 'Quick win' recommendations have not been specified or singled-out, as the site will undergo a major renovations and inherent a new content management system.

Planning

Strategic Plan:

→ Develop a Strategic plan for the Insidedge website that integrates with the organizations Strategic goals and objectives. The end owner, and related stakeholders (e.g. key management) should be the final approval for signing off on Strategic goals developed for the website
→ Once the Strategic plan has been defined, it is recommended that the owner and webmaster review it on a bi-annual basis to ensure that the goals and objectives are being measured and achieved

Governance:

→ Editorial policy required for the development and treatment of content (including images, social media, etc.)
→ Develop and maintain a taxonomy strategy and related metadata standard. The search engine optimization of the Insidedge website could be improved by developing metadata standards and use policies and a strategy for developing taxonomies
→ Develop an approval/editorial process whereby content is regularly vetted for accuracy and relevancy by appropriate the appropriate owner or editor (e.g. all content must be reviewed and republished or deleted every 9 or 12 months)
→ Create a multi-disciplinary, structured content team under Editor including content owners and contributors that know and understand the governance model
→ Hire a part-time contractor to help create content, and manage social media aspects of the website

Website Assessment Report 44
Prepared by Prescient Digital Media

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# Planning

Strategic, functional, and UX

### Strategic Planning
Develop specific goals; align intranet with the enterprise strategy

### Social Planning
Determine the type of tools and how they will be used & governed

### Governance
Create & document ownership & management model & policies

### Functional Planning
Detailed plan for the form, function and application of new solution

### Business Case & ROI
Measure and document the cost benefit analysis of a new solution

### User Experience
From information architecture to wireframes, branding, and design

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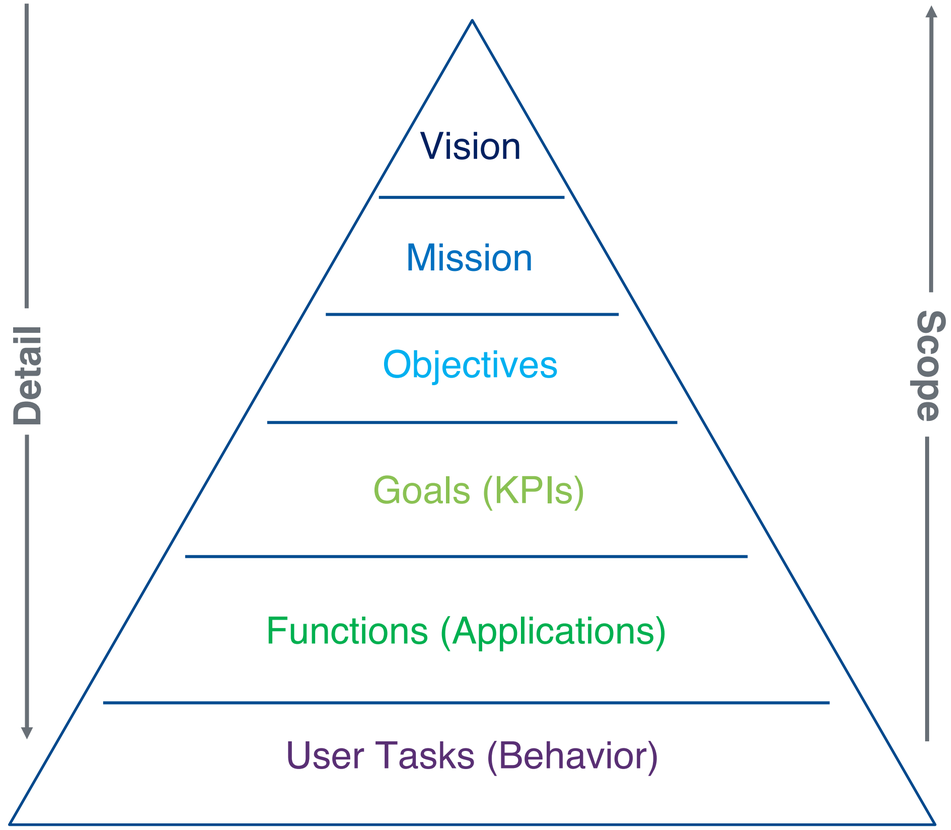
# Strategic Planning

## Gap Analysis, Findings, Recommendations




Intranet Planning Pyramid © 2011 – 2019 Prescient Digital Media

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# Goals & Objectives

Mapping intranet goals & objectives strategy

### Objective 01
Increase employee satisfaction

**USE GOAL**

**ROI GOAL**

### Objective 04
Reduce operating costs

### Objective 02
Decrease stale content

**SAT GOAL**

**PRO GOAL**

### Objective 05
Increase employee productivity

### Objective 03
Increase FTE engagement

**ENG GOAL**

**SVC GOAL**

### Objective 06
Improve customer service

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# Apr 2019 Digital Workplace Scorecard

**Unique Users**

75%

**Page Views**

118,765

**User Sat**

8.2

**Publishers**

32

**ROI**

82%

**Completed Transactions**

778

**How effectively do you feel info. is shared?**

60%

**Balance in comms. between HQ & offices?**

51%

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# Governance

Structure + Policies

## Ownership & Management

The intranet ownership & management model; structure including the ownership team, the decision-making process, roles & responsibilities, & policy.

### Ownership Model

Executive champions to content owner and editor(s).

### Roles & Responsibilities

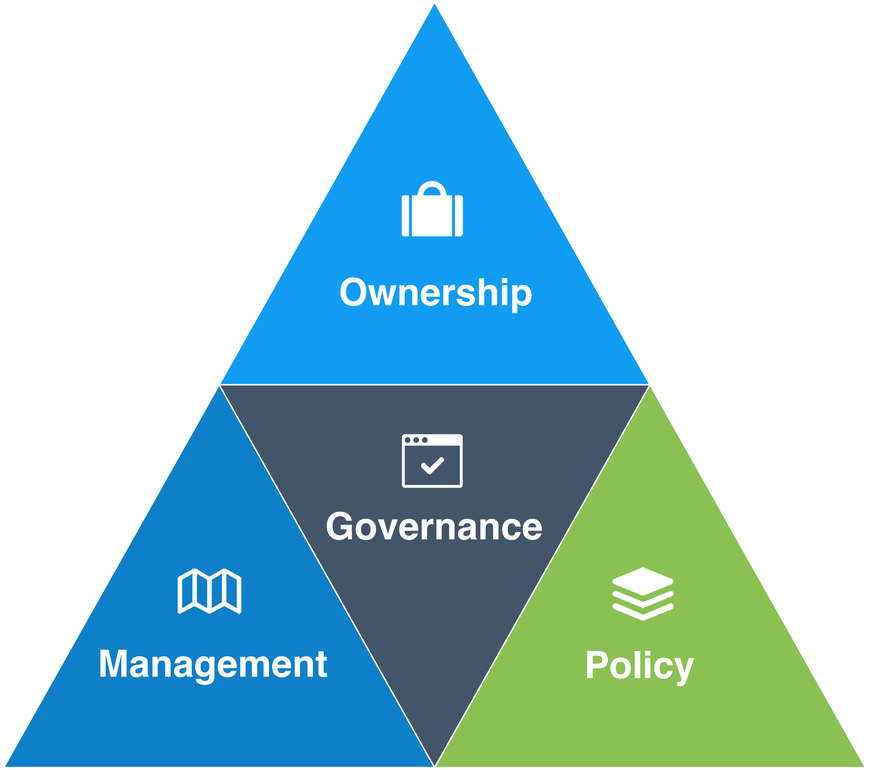
Committees to content owner roles and rules.

### Policies

Content management to taxonomy to social media policy.

### Management Process

Decision-making process for home real estate, new sites, etc.

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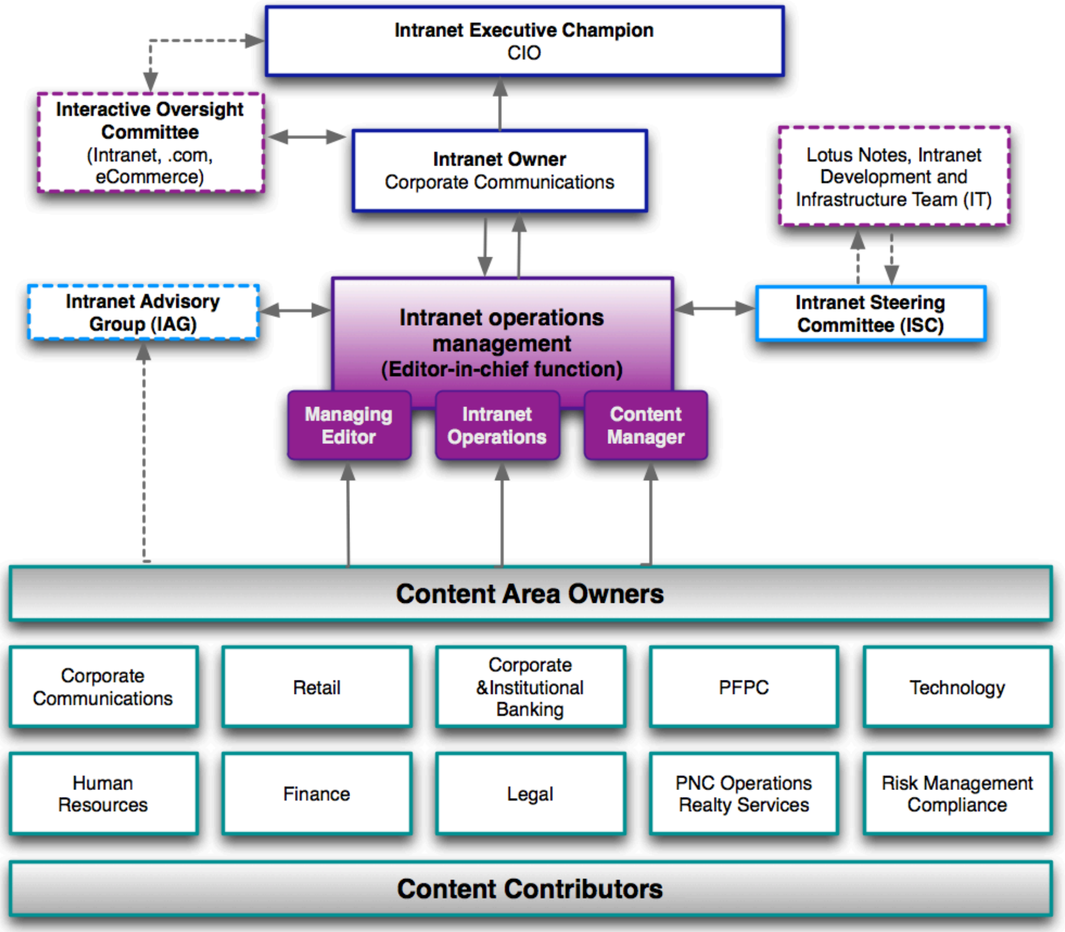
# Governance Model

Hybrid, collaborative model

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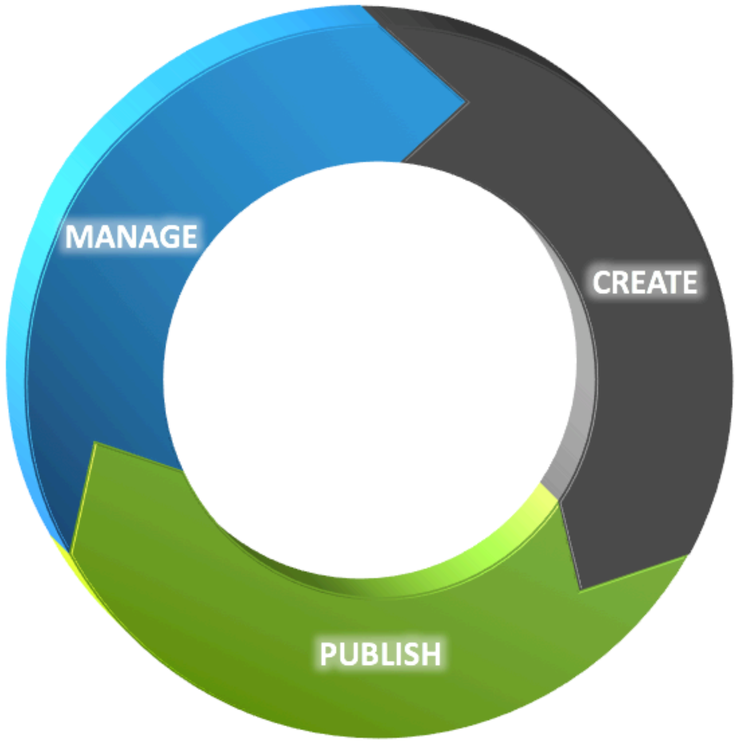
# Content Management

## Content Management Planning




### Roles & Responsibilities
Define roles and responsibilities for all involved with content

### Creating
Content creation and management

### Policies
Define & document the necessary policies including taxonomy

### Managing
Review, refresh and retiring old content

### Types & Templates
Define & document the relevant types of content & templates

### Publishing
Publishing requisites and process

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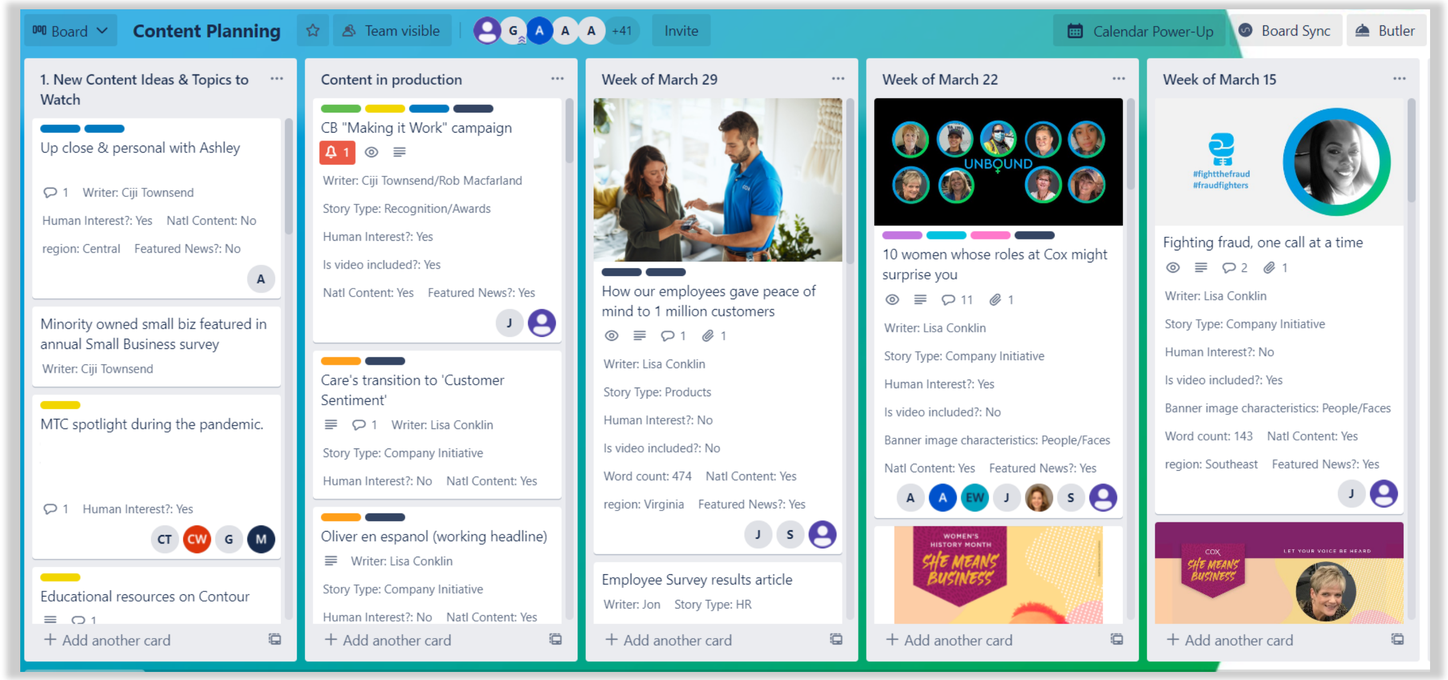
# Content planning

Meet weekly to review editorial calendar.

Use tools like Trello for planning content.

- Align on national and local messaging and newsletter content to avoid duplication.

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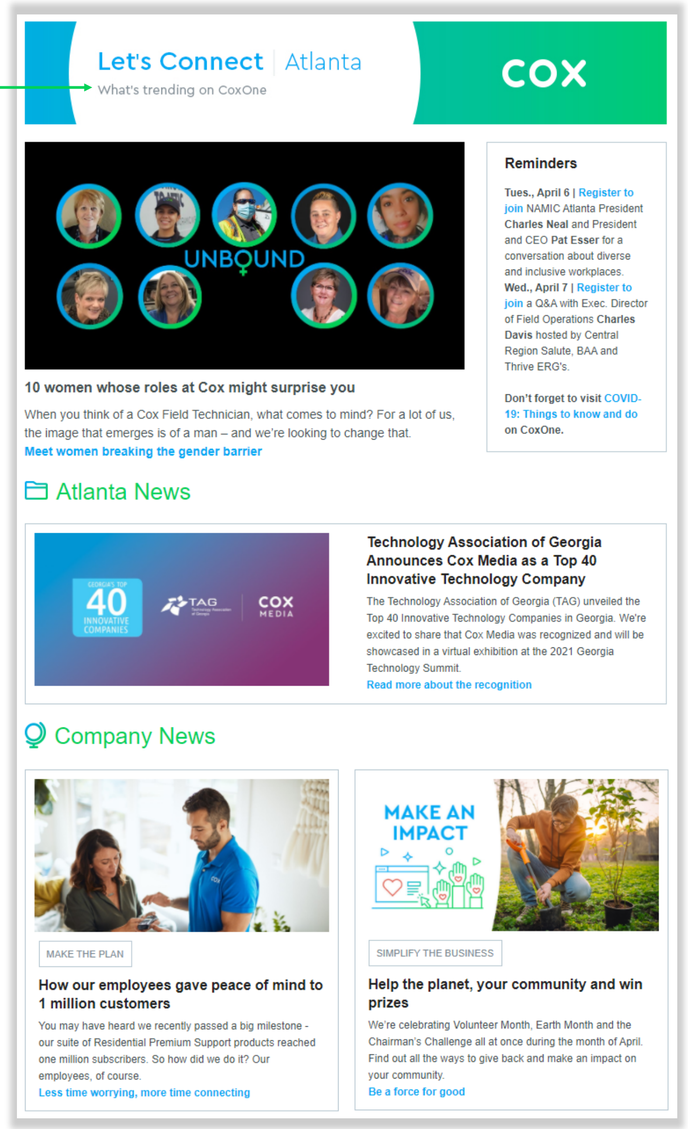
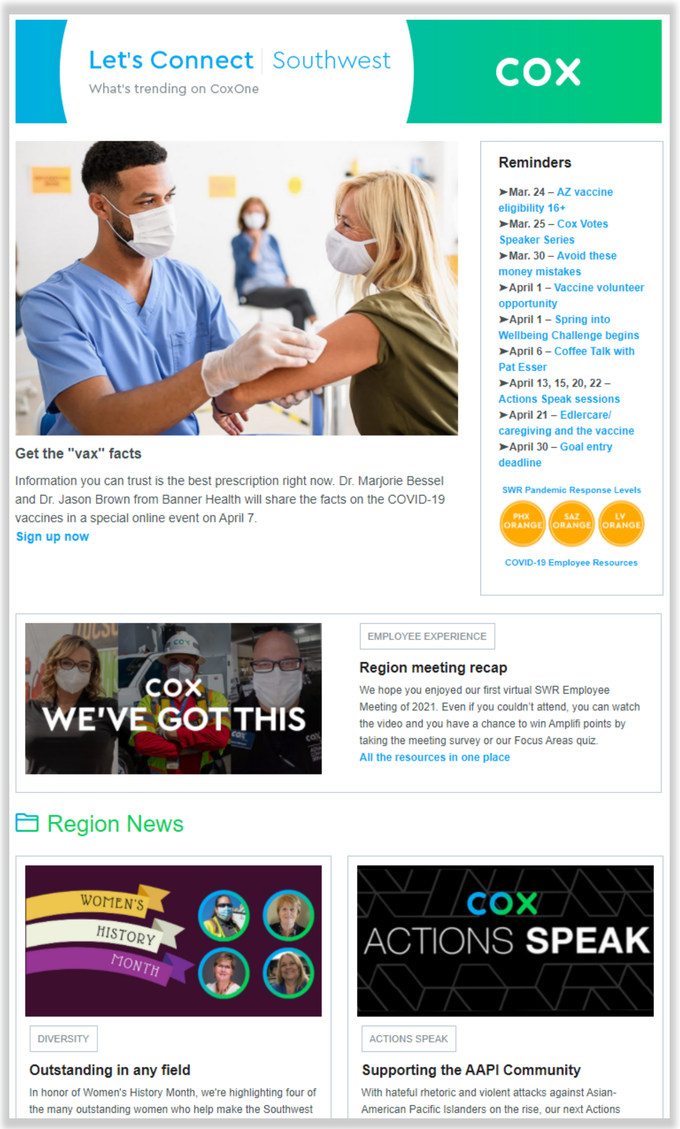
# CoxOne: The source of truth

- Shift in how news is disseminated; news originates on CoxOne.
- *What's trending on CoxOne*: newsletters recap select content already published on the site.

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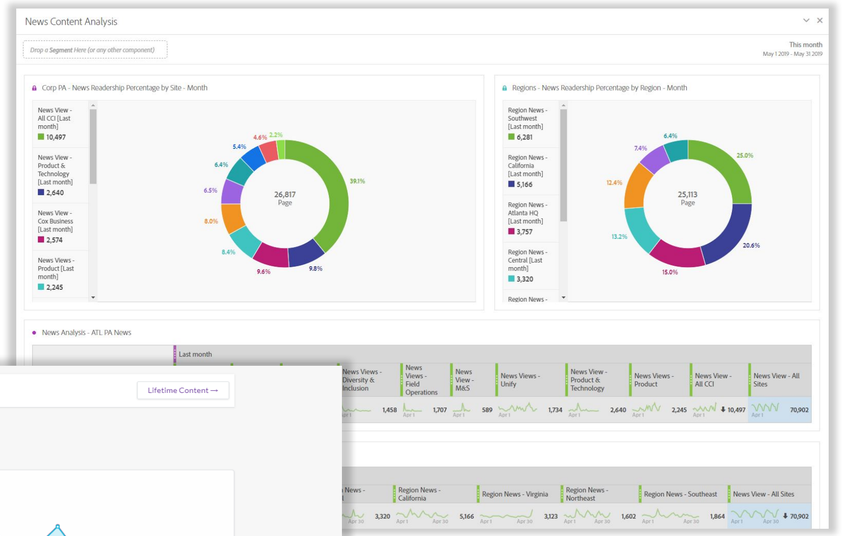
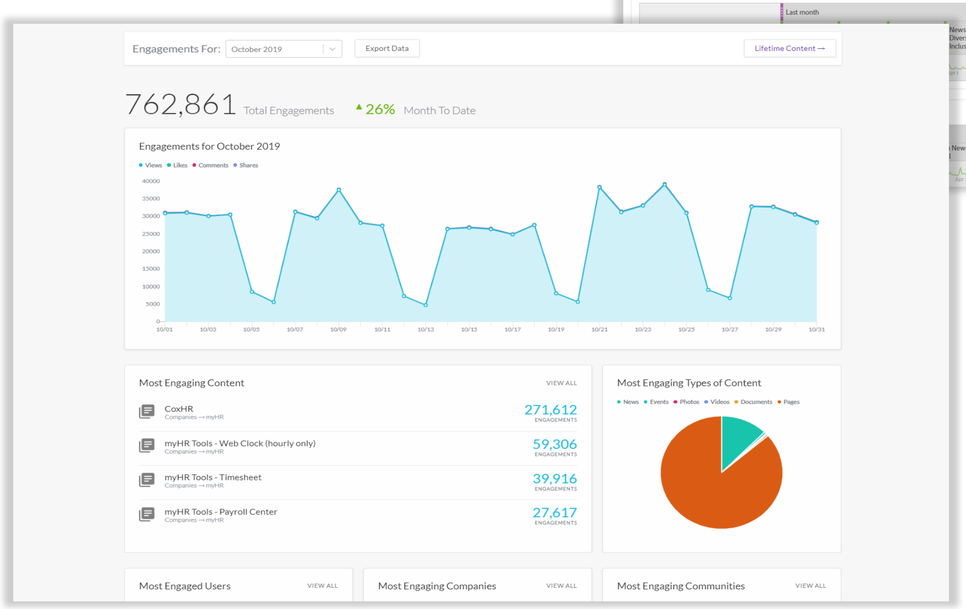
# Tracking content engagements

- Analytics tools provide insights into employee engagements.
- Site admins track engagements and refine content accordingly.
- Key reports include search behaviors and homepage featured news clicks.




**Adobe Analytics**




**Engagements Dashboard**

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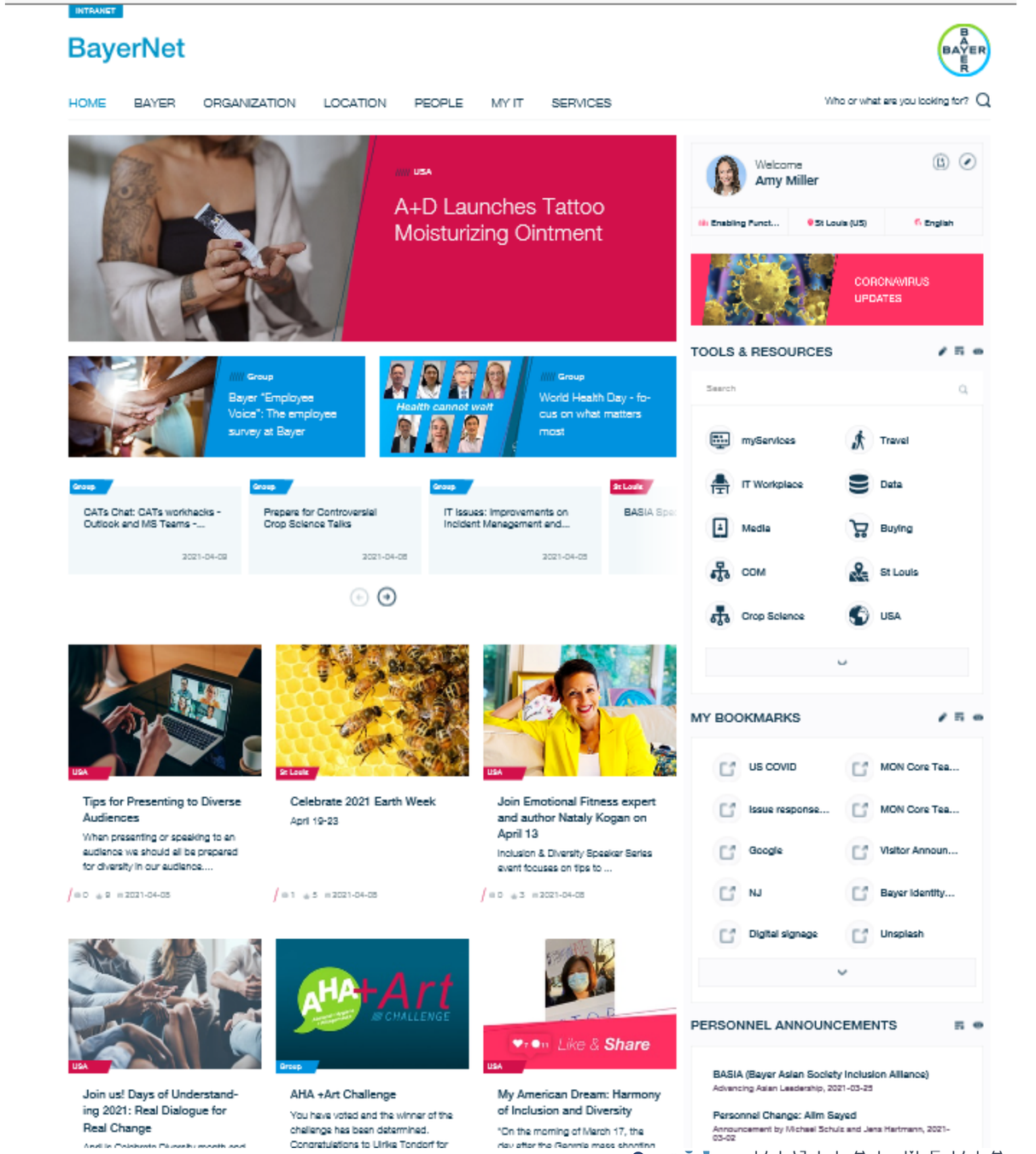
# Three News Tiers

*Blended content based on personalization*

1

2

3

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PROFILE | ADDITIONAL CHANNELS | ADDITIONAL TOPICS | NEWSLETTER

**Welcome to BayerNet!**

This profile is the basis for your individual BayerNet - your news, navigation and quicklinks. **Please check your settings** and complete your profile. You can also subscribe to additional channels and topics. Please note that options may be limited during the roll-out phase.

Find out more about the great range of useful features offered by BayerNet here →

Division / Business Unit

Enabling Functions / Country Platform

Country/Region

USA

Function / Unit

Communications

Site

St Louis

Language

English

SAVE ALL SETTINGS

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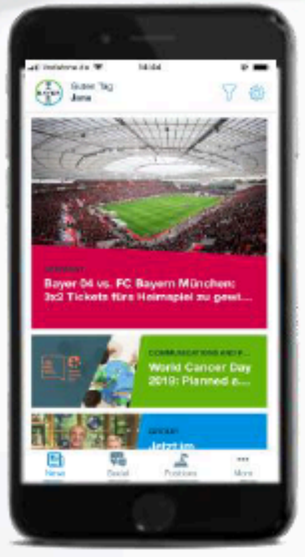
# A new tool for employees



BayerNet

# BayerNet App in a Nutshell

**The new BayerNet App has two main objectives:**

**Easy and fast 24 / 7 mobile access to company news:**
Company news will be easily accessible on smartphones, even via private devices.

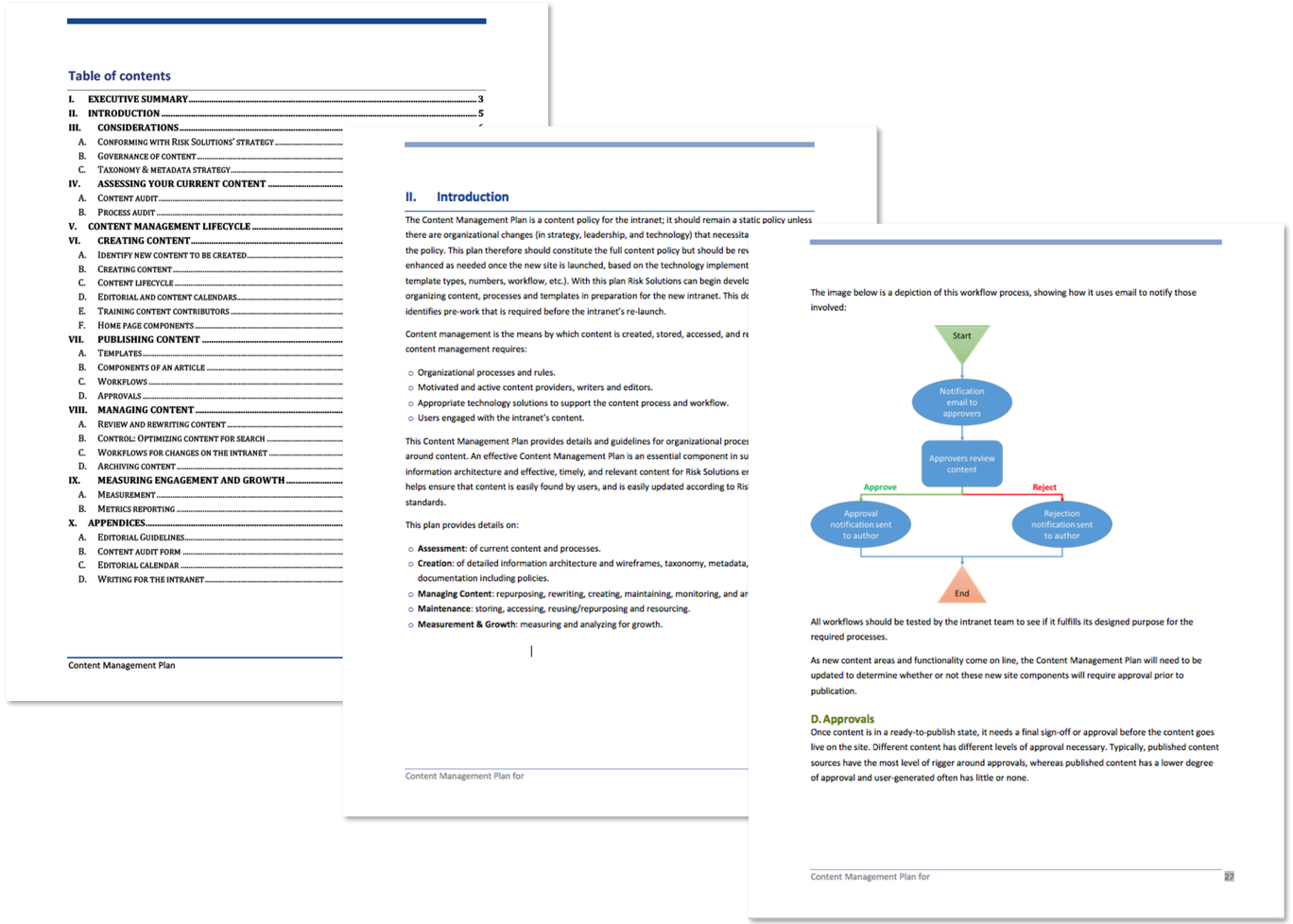
**Support employees in advocating on social media:**
Employees will be able to share content with their peers via social networks and find answers on critical questions and information on Bayer's positions.

The app provides the personalized BayerNet newsflow, an overview of Bayer social media activities, pieces to be shared on social media, as well as static content on critical topics and very important global change projects.

In the future, the BayerNet App will be the only (standard) employee app for internal news and advocacy functionalities on mobile devices.

# Content Management Plan





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D. WRITING FOR THE INTRANET ...


Content Management Plan

## II. Introduction

The Content Management Plan is a content policy for the intranet; it should remain a static policy unless there are organizational changes (in strategy, leadership, and technology) that necessita
the policy. This plan therefore should constitute the full content policy but should be rev
enhanced as needed once the new site is launched, based on the technology implement
template types, numbers, workflow, etc.). With this plan Risk Solutions can begin develo
organizing content, processes and templates in preparation for the new intranet. This d
identifies pre-work that is required before the intranet's re-launch.

Content management is the means by which content is created, stored, accessed, and r
content management requires:

- Organizational processes and rules.
- Motivated and active content providers, writers and editors.
- Appropriate technology solutions to support the content process and workflow.
- Users engaged with the intranet's content.

This Content Management Plan provides details and guidelines for organizational proces
around content. An effective Content Management Plan is an essential component in su
information architecture and effective, timely, and relevant content for Risk Solutions e
helps ensure that content is easily found by users, and is easily updated according to Ris
standards.

This plan provides details on:

- **Assessment**: of current content and processes.
- **Creation**: of detailed information architecture and wireframes, taxonomy, metadata,
documentation including policies.
- **Managing Content**: repurposing, rewriting, creating, maintaining, monitoring, and ar
- **Maintenance**: storing, accessing, reusing/repurposing and resourcing.
- **Measurement & Growth**: measuring and analyzing for growth.

Content Management Plan for

The image below is a depiction of this workflow process, showing how it uses email to notify those involved:




All workflows should be tested by the intranet team to see if it fulfills its designed purpose for the required processes.

As new content areas and functionality come on line, the Content Management Plan will need to be updated to determine whether or not these new site components will require approval prior to publication.

### D. Approvals

Once content is in a ready-to-publish state, it needs a final sign-off or approval before the content goes live on the site. Different content has different levels of approval necessary. Typically, published content sources have the most level of rigger around approvals, whereas published content has a lower degree of approval and user-generated often has little or none.

Content Management Plan for 27

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# Business Planning

## Cost & Benefits

### Requirements
A review of the full requirements for the anticipated solution

### Benefits
The anticipated benefits of implementing the planned solution

### Plans
The strategic and functional plans

### Cost
The anticipated cost of implementing the planned solution

### Future State
The roadmap outlining the planned solution

### ROI
The estimated, expected return on investment of the solution

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# Business Plan

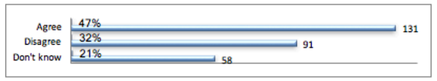
Cost benefit analysis, ROI, aligning plan with business goals

## V) Measurable benefits to demonstrate dollar value ROI

### A. User productivity

In the assessment phase of this project and in the recent employee survey, Prescient noted th
productivity was a principal concern among stakeholders and the users of the PSS employee i
productivity is hard to define, as it means different things to different people and different bu
across PSS. Yet when one employee notes that: "Information is generally very hard to find. Bu
for decision making does not exist," that person is referring to both a perception (something
there, I am not sure) and reality (the information is definitely not there) about their intranet.
frustration is difficult to measure in it's entirely, it speaks to issues if finding key information
perform employee tasks and to make decisions.

The employee Productivity Survey (282 respondents in total) asked users to agree or disagree
following statement: "I am a more productive employee as a result of using my local PSS intra
SharePoint sites)." Som Chart Area and answered accordingly. Just fewer than half agreed
the current employee intranet has helped them be more productive.




A revised employee intranet can increase productivity by enhancing access to information (be
navigation), and making it easier ease to find it (search tools). An enhanced intranet can reduc
unproductive activity, such as updating intranet content to multiple platforms and using up ke
resources (i.e., fielding low-level requests for information) that could be allocated more prod
elsewhere.

*Advantages*

- Time savings for finding information
- Better and accurate information retrieval
- Happier and less frustrated users

*Measurement & Tactics*

- Employee productivity survey to measure:
  - Time spent locating people/projects
  - Difficulties in currently finding information

PSS Employee Intranet Business Case

### B. Manager/Employee portal - self-service tools

One of the top identified priorities for the PSS core team working is to design and build a self-
with social business features using SharePoint 2010. Currently the PSS home page only offers
most common applications used by PSS employees. These applications, in addition to expense
several key forms are highly used and highly valued by all staff. However, they are not collecti
organized for specific user, such as managers.

In the assessment phase Prescient heard that managers did not use the employee intranet be
felt it did not serve their needs. However, they saw that there could be value in collating comr
"toolkits" in a dedicated area on the intranet to help them manage more effectively. Currently
others staff in their department to "find" various policies, forms and other tools they need to
manage staff and their projects. A dedicated manager toolkit and support service – based on
SharePoint features - will help save time, streamline approval process and aid in hiring new st

PSS staff should also have their own self-service center on the employee intranet. This would
complete common tasks, find HR forms and policies, and various help tools.

*Advantages*

- Provide easy access to Leadership development tools

Reduce time and streamlines the effort of approval stages

- Empower managers for time-tracking efficiencies, such as: completing performance review
  staff, identifying project resources, etc.
- Employee self-service model will improve the overall content access for staff
- Captured data better through automating or converting paper or PDF forms to web-based f

*Measurement & Tactics*

- Measure the current time it takes for staff to find new job openings & apply for them
- Digitize the top 10 HR forms: i.e., requisition, new hires, performance management process
  track their usage and download rate. Could compare against previous email requests for sa
- Is PSS now compliant with federal human resources laws (either yes or no)
- Onboarding site – measure engagement of first week/month of a new hire

PSS Employee Intranet Business Case

- User polls and surveys, employee engagement survey – to measure key issues

### G. Search

Search and advanced search tools can make information easier to find on the intranet. Currently most staff have difficulty finding anything as the PSS employee intranet does not currently have Search enabled! Simply providing this tool will achieve benefits for staff, but a search strategy (categorizing information, taxonomy, meta-data, etc.) must also be factored in.

*Advantages*

- Provide access to more relevant information, documents, people, projects, etc.
- Give users the feeling they are working with a reliable and trustworthy tool

*Measurement & Tactics*

- Measure usability improvements
- Using less clicks to find documents and information
- User-testing of common tasks/scenarios – define the tasks to measure
- Examine the scores from the Employee Satisfaction Survey and how they can be improved

### H. File Shares

Sharing files and content is a common daily activity for many PSS users. To be successful in their workday, users want files to be contained in secure online locations that are easily accessible. The disadvantage of file shares is that they are often disorganized, they lack naming conventions, they are overcrowded, and they have a poor archiving strategy in place. However, most users and organizations are reluctant to get rid of file shares altogether and they (servers) are relatively inexpensive and their use is ingrained in most employee behaviour.

What PSS needs to do is rely less on file shares for documents that could otherwise be stored in SharePoint teamsites for projects. That is, reduce the dependence on files stored in shared drives by using the intranet as the primary knowledge repository.

*Advantages*

- Provide easy access to files in the organization
- Better visibility
- Can set Archive policy
- Better access to documents.
- Better retention of "Key" knowledge for staff who retire
- Better archive strategy using SharePoint 2010
- Better information retrieval and accuracy of information
- Data encryption can be provided to sensitive documents that are placed in SharePoint.

PSS Employee Intranet Business Case 23

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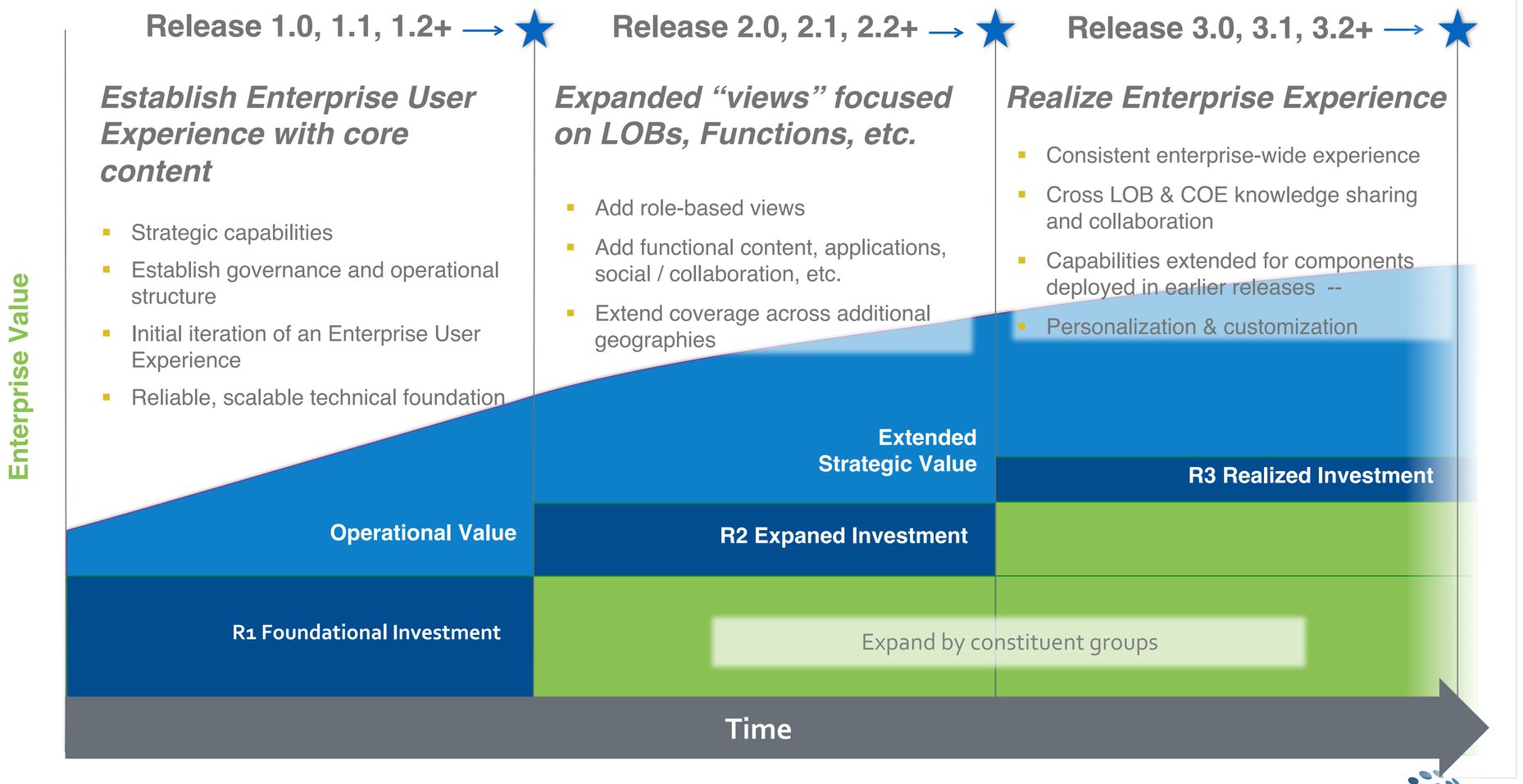
# Phased Road Map

## Think Big, Start Pragmatically, Scale Exponentially

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# Governance

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# Process, Not A Project

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# Executive Champion

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# The Champion

- C-level executive
- Budget
- The champion should have power and influence
- Understands the value of the intranet & the potential
- Only attend an occasional meeting

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# Wide Open

Read and react to the thoughts of Mike Morris, AEP's chairman and CEO.

**Friday**, June 11 2010 at 10:11 a.m. ET | Author: Mike Morris | Category: Personal life

## First job and heroes

Hi, this is Mike with a very tardy blog post, but I thought today would be a great day to do something unique and different.

Over the last couple of weeks, I've been asked by outside organizations to talk about my first job, and to lay out the things I learned in my first job that stick with me today.

And in there were some questions about who are my heroes, so let's start with those two things.

This will be kind of fun, I would hope, as we go down toward the end of the summer and look forward to a three-day weekend the week after next. So, here we go.

My first job was delivering the Toledo Blade to customers on Glenwood Avenue in Toledo, Ohio. I did that as a young kid, probably 10-11 years old, and did it for about four and a half years. I would do my route, and my brother would do his about two streets over on Scottwood, then go back to the station, pick up 50 more papers, and stand on the corner of Central Ave. and Detroit Ave. and sell papers for 7 cents a copy.

I'm sure your first job was interesting. I learned a lot about people and a lot about responsibility, and I'm sure



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# The Key to Intranet Success

- C-level executive
- The champion should have power and influence
- Understands the value of the website & the potential
- Needs to be involved, but not on a day-to-day basis
- Only attend an occasional meeting

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# Talk The Talk



- What does your organization value?
- Success is more than dollars
  - Customer / employee satisfaction
  - User productivity
  - Awareness / Message retention
- ROI is more than just hard cost savings
  - Productivity benefits
  - Time to market

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# Governance Model

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# Traditional Governance



- **Decentralized (most common in larger orgs.)**
    - No single owner
    - Driven by policies and guidelines
    - Organic growth, often leads to site sprawl
- **Centralized (more common in small orgs.)**
    - Single owner (usually department)
    - Bureaucratic
    - Highly controlled

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# Modern Governance

- **Collaborative / Federated**
    - Steering Committee / Council
    - Decentralized content ownership; centralized platform
    - Bureaucratic
- **Centralized Hybrid**
    - Single owner (usually department)
    - Bureaucratic
    - Centrally controlled

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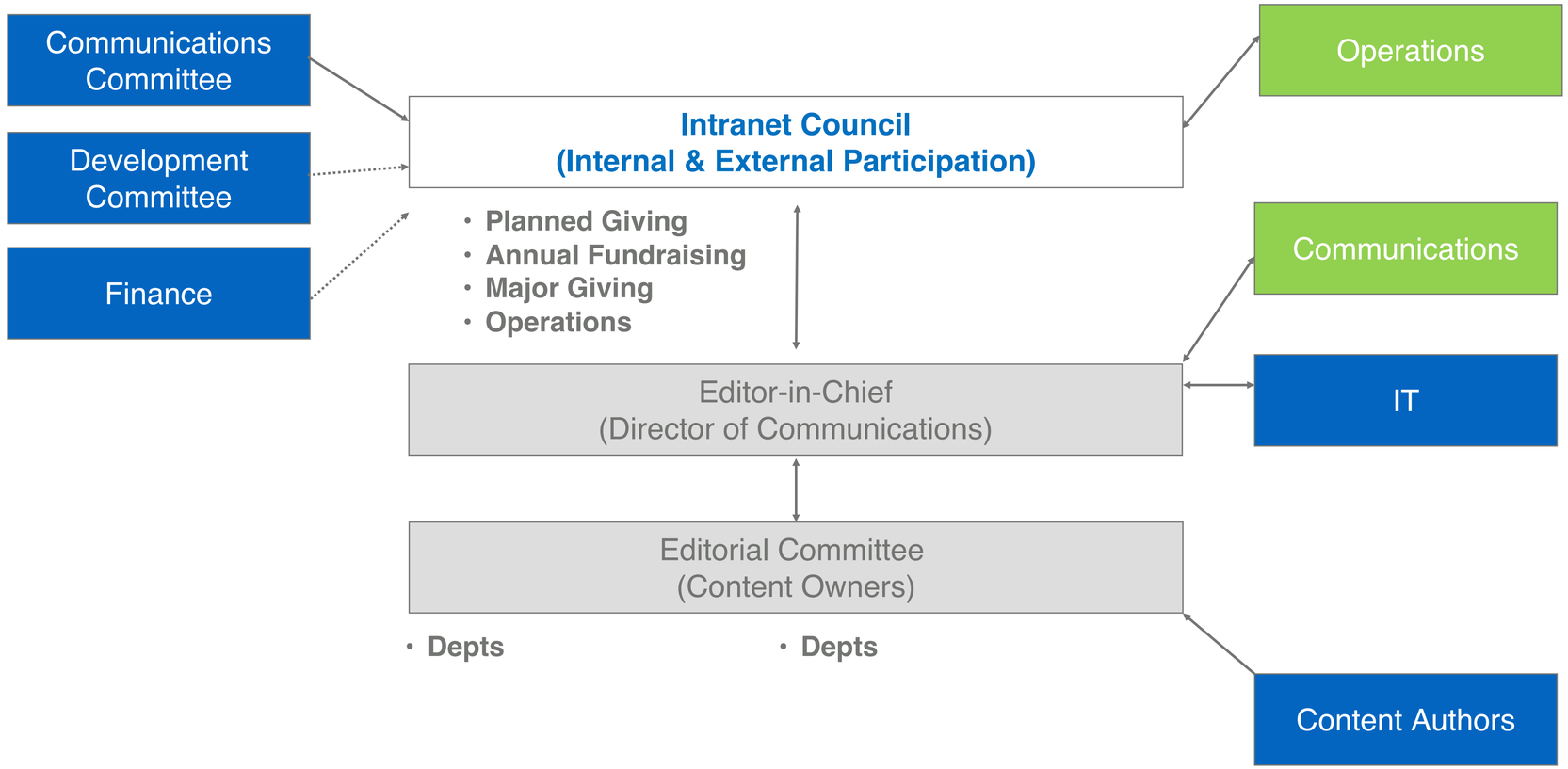
# Collaborative

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# Typical Structure

- Champions: Chief Operating Officer, CIO
- Owner: SVP, Internal Communications
- Steering Committee (10):
  - Representation from: IT, HR, Internal Communications, Europe, USA, UK
  - Members must be representative of the global organization
- Editor-in-Chief: Employee Communications

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# Centralized, Hybrid Governance

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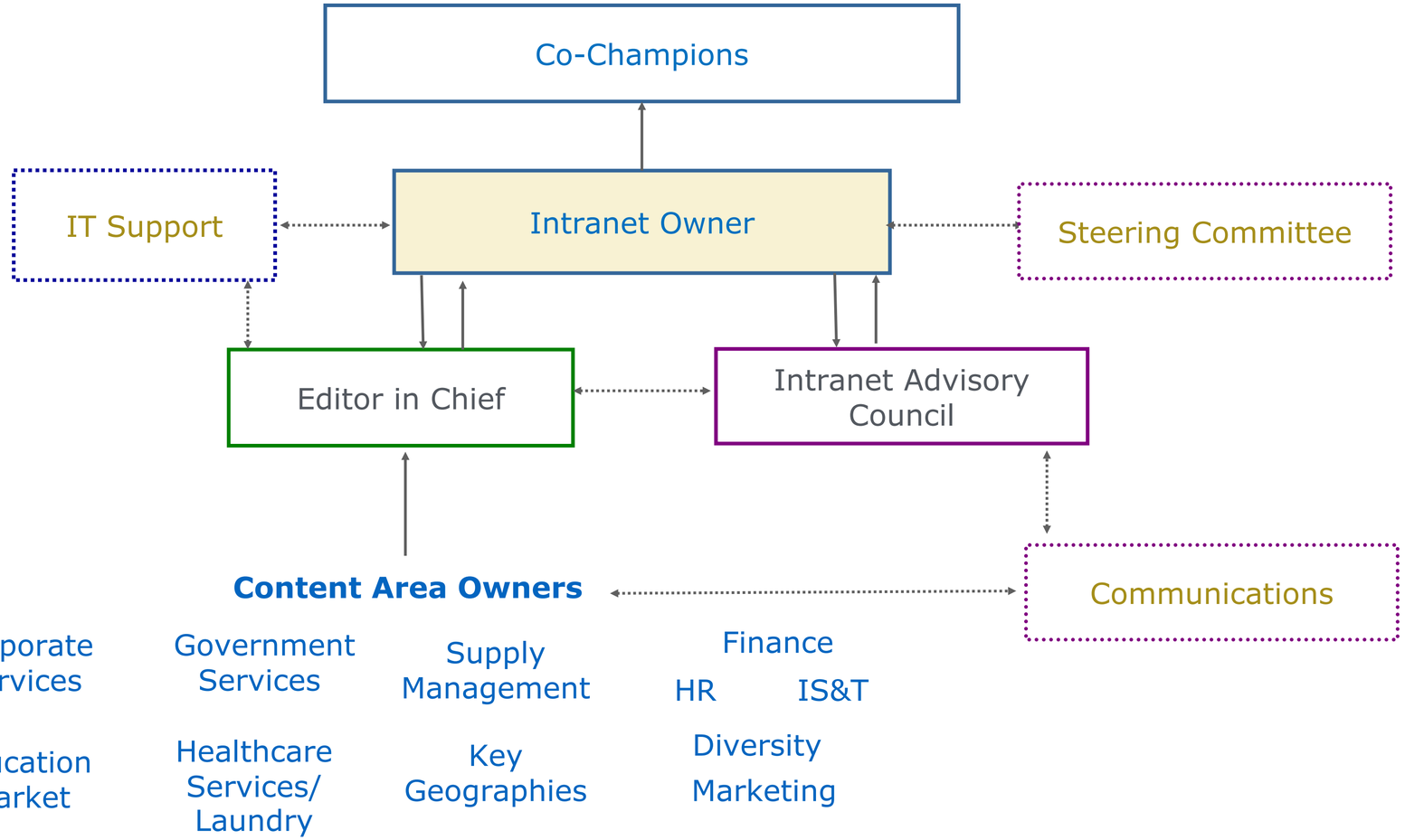
# Centralized, Hybrid

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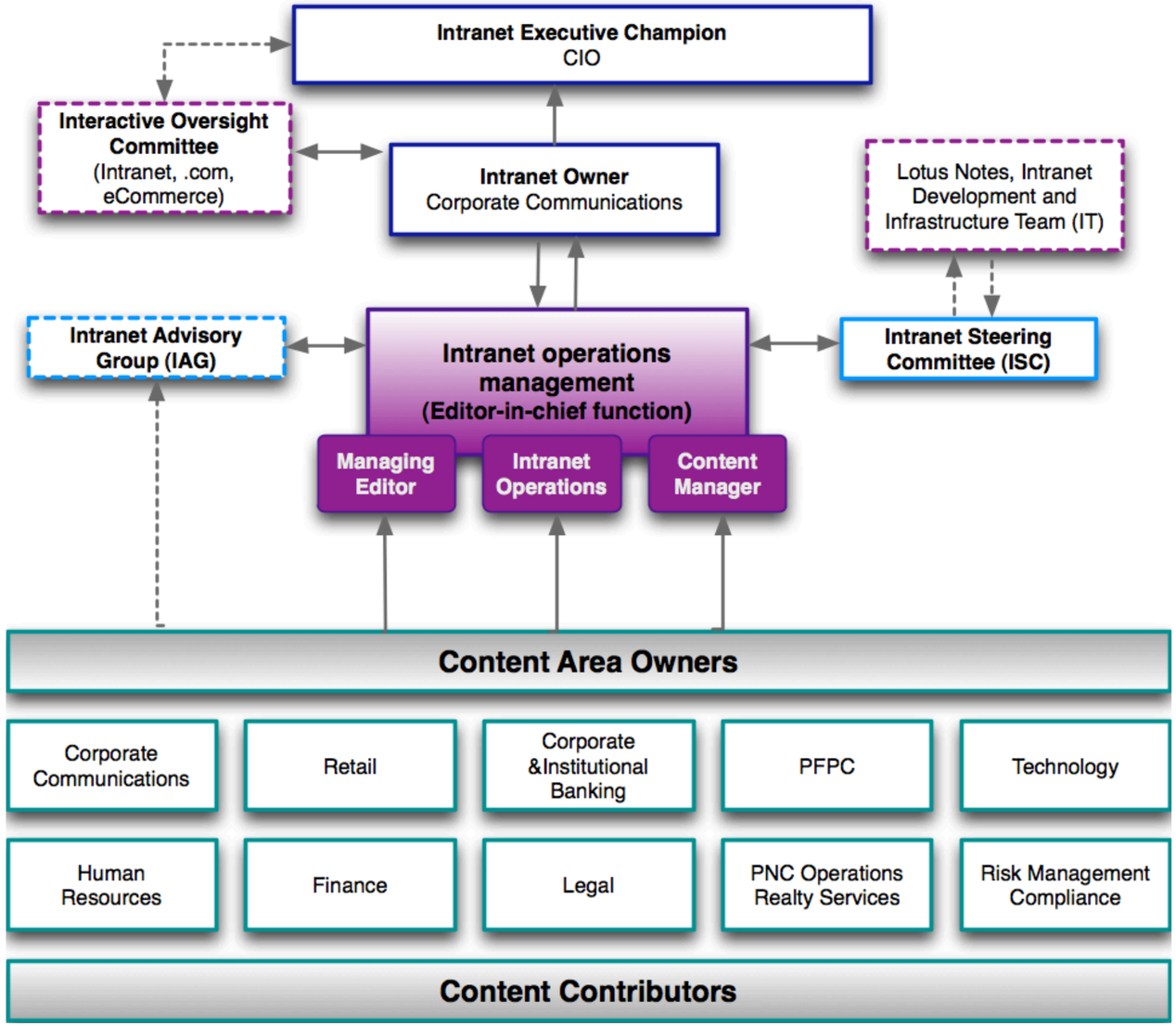
# Centralized Hybrid

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# Sample structure – Centralized Hybrid

- Champions: Chief Operating Officer, CIO
- Owner: SVP, Internal Communications
- Steering Committee:
  - Representation from: IT, HR, Internal Communications, Europe, USA, UK
  - Members must be representative of the global organization
- Editor-in-Chief: Employee Communications

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# Day-to-day Management

- Home page, corporate content & news owned by Editor-In-Chief
- Training of the content owners done by IT
- Content owners adhere to standardization policy and ensure their content is:
  - Up to date
  - Written in web format
  - Appropriate for their target audience

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# Champions

- Champions will participate in:
  - Supporting owner and committee
  - Representing intranet to senior executive
  - Source of funding
  - Trouble-shooting and conflict resolution

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# Owner

- Maintains the intranet vision & mandate
- Manages policy development
- Approves project prioritization
- Monitors performance against objectives
- Allocates resources and budgets

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# Intranet Steering Committee

- Chaired by Intranet Owner
- Includes HR, IT, Comms, and sometimes divisional representatives
- Brings insight from the whole organization
- Discusses policy, evolution of site and drives future enhancements
- Provides input, reviews and signs off on plans & policies
- Troubleshooting

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# Policies

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# Standards & Policies

Critical Necessity: explicitly defined and documented standards & polices to:

- create a uniform user experience
- protect and secure information and intellectual property
- contain sprawl and reduce associated costs
- ensure accuracy and consistency of content

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# Policies

- Editorial policy defining:
  - Content types: front-page news vs. static content
  - How content is developed, formatted, presented
  - Limitations on technical and graphic elements
  - Roles and responsibilities of publishers, editor etc.
- Standardization Policy
  - Compliance details for platform, templates and style guide
- Email Usage Guidelines & Policy

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# Taxonomy

- Editor-in-Chief to implement a complete corporate taxonomy guided by business and function need for:
  - storing, cataloguing and ‘tagging’ content
- A taxonomy ‘rule book’ in tandem with a new Content Management System will ensure effective meta tagging and content categorization by all publishers

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# SharePoint Considerations

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# SharePoint Adoption

80%

Med-Large size Organizations

55% For social media

50% To power main intranet or portal

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# Sprawl

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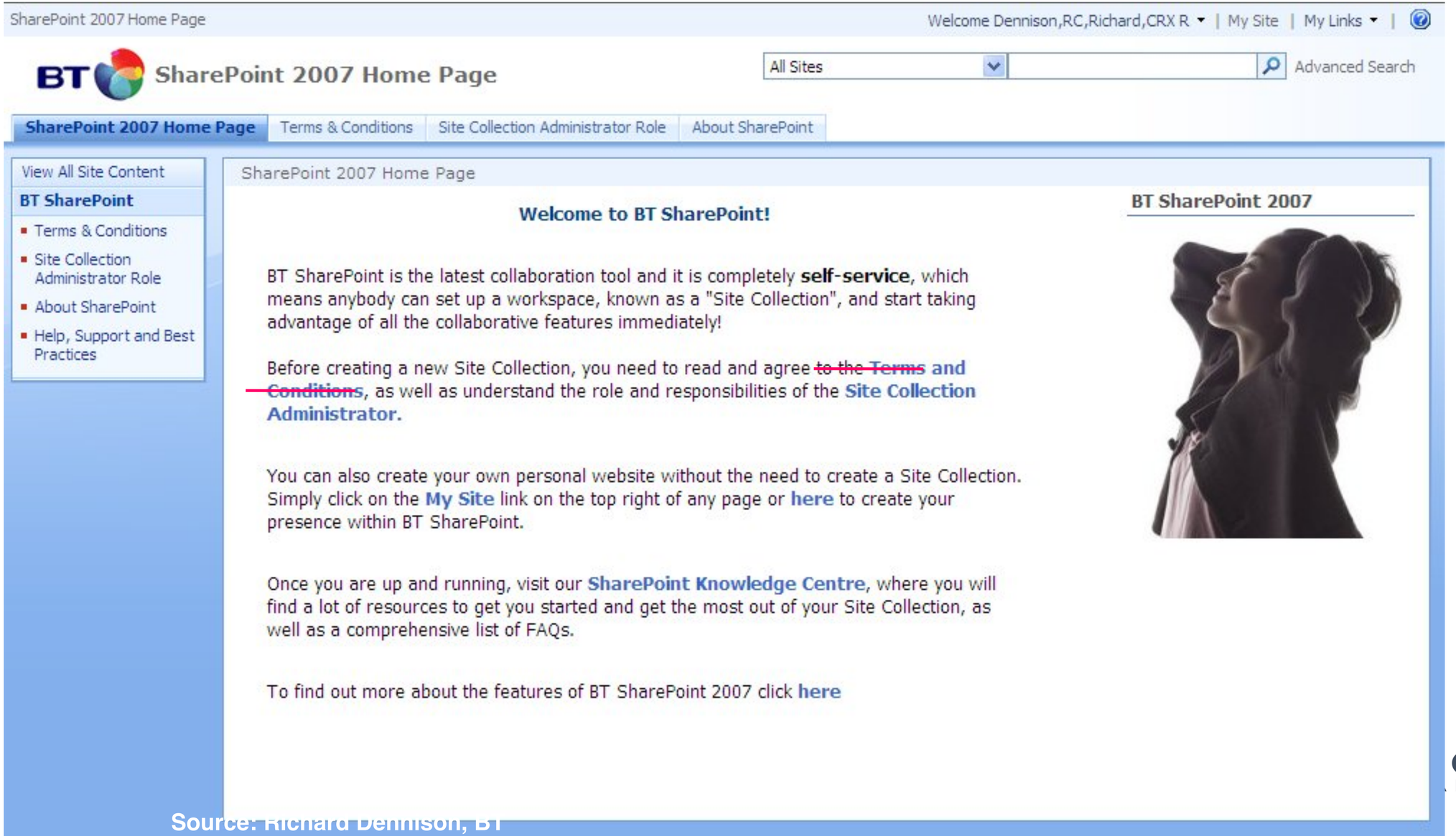
# Team Sites at BT




Source: Richard Dennison, BT

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more information.

7. Customisation of Site Collections is not allowed, apart from using BT approved logos. Colour, branding and features are as supplied and are not negotiable. BT employees should not be developing sub brands.

8. Site Collection Administrators need to ensure that projects have local copies of all data in the event of service failure or accidental deletion. The restoration process is not available to restore data accidentally deleted or overwritten by users. Delete means delete!
Daily backups of the whole SharePoint platform are performed for disaster recovery purposes only and this process may take some time to complete depending upon the circumstances of the failure. Therefore, Site Collection Administrators need to ensure that their data is available in the timescales they require and are responsible for ensuring that their document and data management processes (including backup and restore) continue to meet their quality, contractual, regulatory, and all other business obligations.

9. Site Collection Administrators are responsible for all content published.

10. Site Collection Administrators are responsible for renewing their Site Collection. Alerts will be emailed to both Site Collection Administrators 90 days after the Site Collection has been created. These alerts will continue to be sent for 28 days, until the site is renewed or deleted. If the site is not renewed within 28 days, it will be deleted. If the site is renewed, new alerts will be emailed a further 90 days later.

11. A Site Collection should only be renewed if it conforms to **BT Retention Policy.**

NOTE: if you need any clarification or have any queries, please visit the **Knowledge Centre.**

If you agree to be bound by the above terms and conditions, you are ready to get started!
**Create a new Site Collection**

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10. Site Collection Administrators are responsible for renewing their Site Collection. Alerts will be emailed to both Site Collection Administrators 90 days after the Site Collection has been created. These alerts will continue to be sent for 28 days, until the site is renewed or deleted. If the site is not renewed within 28 days, it will be deleted. If the site is renewed, new alerts will be emailed a further 90 days later.

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# Team Sites @ Transfield

1. Request a Team Site
2. Learn “When” & “What” to use a team site for
3. Read the Quick Reference Guide
4. Review the Team Site user guidelines
5. Checklist for establishing a new site
6. Enroll in a Team Site workshop
7. Watch a Team Site video tutorial
8. Follow a Team Site user tour

**Source: Intranet Innovation Awards / Transfield Services, Step Two**

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# 3rd Party Applications

# 57%

## Have augmented SharePoint with additional products such as Lumapps, Interact, Workgrid, Nintex, et.c

*Gartner, “SharePoint Adoption,” 2011*

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# Top 5 Keys to Governance

- Executive champion
- Detailed model, with roles and responsibilities
- Forced keywords, and expiry controls
- No anonymous content
- Strong policies for use, content creation, collaboration

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CODE OF CONDUCT | ALERTLINE | MY PROFILE | PUBLISHER | WEBMAIL | LOGOUT

NCR Experience a new world of interaction

SEARCH GO

People Search | Advanced Search

News | Products and Services | HR Central | Inside NCR | Resources | Support

## Breaking News: Important News Release about NCR

NCR has made a very important announcement. Please see the press release for details.

Read the Press Release»
View video from Bill Nuti»
Read the email from Bill Nuti»

Breaking | QuickStart | Roadshow | Recycling | Gartner | Kiosk Launch

Find People | Find Products and Services

Last Name | First Name | All Regions | Find

Name | Phone Number | Quicklook ID

Select the Quicklook link to view additional information Quicklook

## Top News | Edit

28 Jun
"Made in USA" Making Comeback as Manufacturers "Onshore"

21 Jun
Mark Grossi featured in Payments Business magazine

17 Jun
Made in USA: Overseas jobs come home

16 Jun
Why One Retailer Chose Blockbuster Kiosks Over Redbox

15 Jun
NCR Financial Kiosks – delivering the ultimate consumer experience

## Blogs

11 Jul
EasyPoint 3800 Training

07 Jul
Employee Engagement Week 13: Recognition in Hyderabad

06 Jul
NCR Engages on YouTube, Twitter and Facebook

05 Jul
Link directly to a book or video in Books 24×7

01 Jul
Books 24×7 – Back up and mobile!

See All Blogs »

## NCR Financials

**Earnings Report**

28 Apr
NCR Announces Strong First-Quarter Results
NCR Corporation (NYSE: NCR) reported financial results today for the three months ended March 31, 2... More Reports»

See All NCR Financials »

**Annual Report**

04 Feb
2009 Annual Report
NCR's Annual Report for 2009 More Reports»

See All NCR Financials »

## Organizational Charts

Industry Solution Group (ISG) Organization Chart

Retail and Hospitality Organization Chart

Travel and Gaming Organization Chart

Financial Services Organization Chart

Corporate Development and Communications Organization Chart

See All Org Charts »

If you have a comment, suggestion or require assistance please contact us.

Hi, Aileen
July 14, 2011 2:34 PM
Collapse

66°F | 19°C
Dundee, Angus

$18.58
NCR CORP

My Favorites | My Tools

- Cash Dispensers »
- NCR SelfServ 25 »
- Competitive Intelligence »
- NCR SelfServ Entertainment Rent/Sell Kiosk Solution »
- Financial Services »

Add Favorites
Set Your Top Five

My Feeds | My Favorites | My Tools
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Popular Topics | Recently Added

15 Jun NCR Financial Kiosks – delivering the ultimate consumer experience »
21 Jun Bill Nuti Q3 QuickStart Message »
21 Jun Chris Askew Q3 QuickStart Message »
23 Jun John Bruno Q3 QuickStart Letter »
07 Jul ATM Refurbishment Program »

Last 30 days »

## My Stocks | Add Index

| Symbol | Last Trade | Change | Change % | |
|---|---|---|---|---|
| NCR | 18.58 | 0.00 | 0.00% | x |
| STU | 29.97 | 0.00 | 0.00% | x |

## NCR Acronyms | Add

Search Acronym... GO

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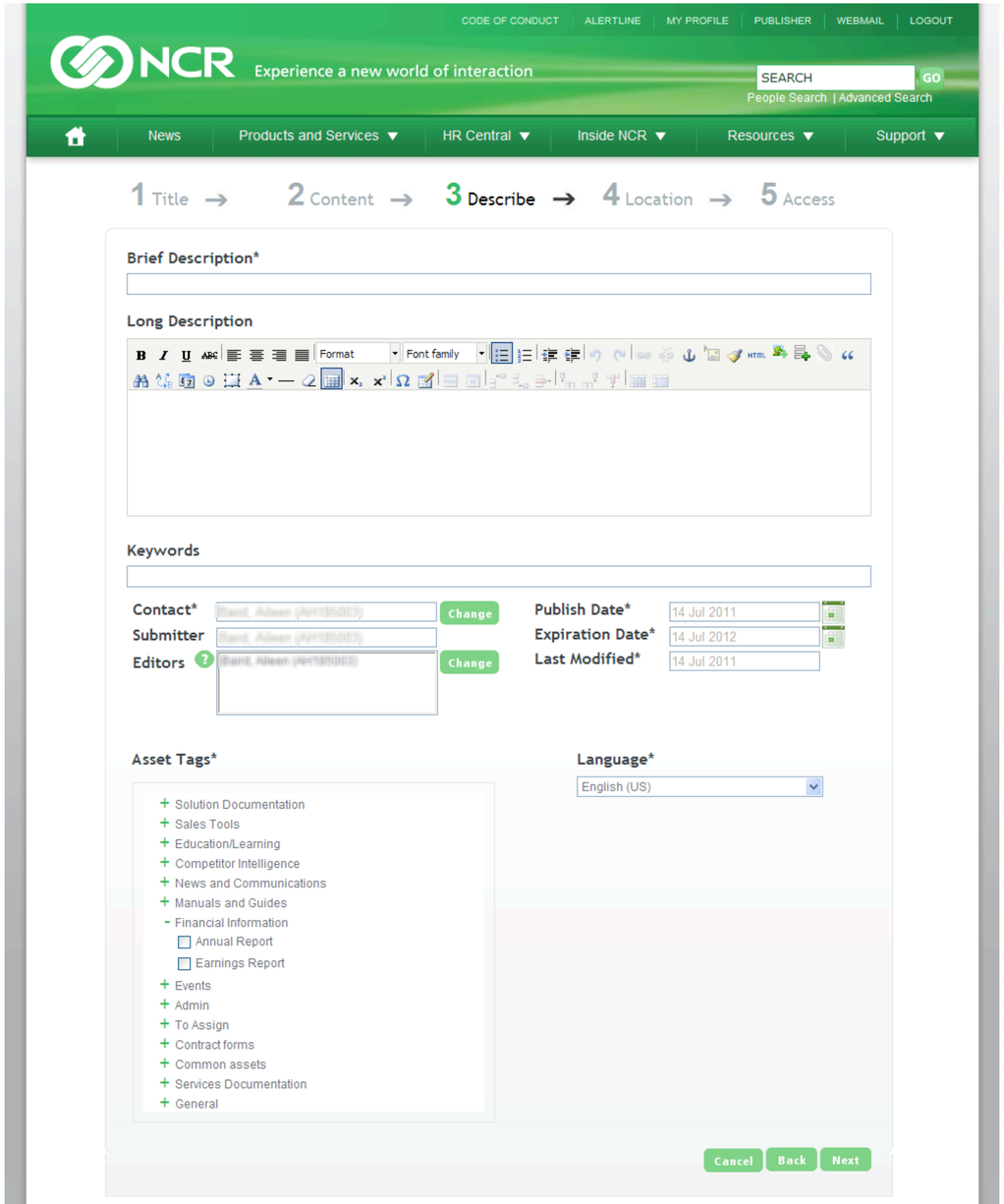
# NCR Governance

| Intranet Team Responsibilities | |
|---|---|
| **Role** | **Responsibilities** |
| Corporate Core Team | Provide governance and program management |
| Online Content Managers | Oversee the daily running of the intranet and activities:<br>• Publish approvals (where required)<br>• Upload corporate collateral<br>• Train and support content owners |
| Content Owners | • Update content and ensure consistency<br>• Can delegate some part of the updates or changes to other members of the team/department by making them editors |

# Content Templates

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# Mandatory Keywords

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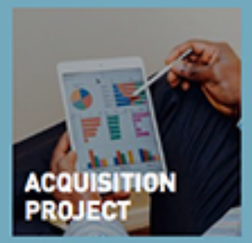
## MY LAST PROJECTS

1




## LIVE

2

**Léa Hawks in All**
Do you like this new portal ?
Unlike (1)

**Matt Bernett in All**
Hi Anton
Like (0)

**Léaticia Buffoni in All**
(raphael@pannier.be) has been #added to the powell-365.com network by Powell Admin.
Unlike (1)

**Nyjah Huston in All**
Hello SharePoint Saturday Portland!
Unlike (1)

VIEW MORE

## MY LAST DOCUMENTS

3

**The New Office in Retail**
by Jim Sand

**Office 365 Development**
by Jim Sand

**Office 365 Power User Training:**
by Jim Sand

**Getting Started with The Skype Developer Platform**
by Jim Sand

## TRENDS

4

**Marketing studies**
by Powell Admin

**Delve**
by Jim Sand

**Elevating Productivity**
by Jim Sand

**The Infrastructure powering Office 365**
by Jim Sand

## VIDEOS

5

POWELL 365 FACEBOOK TWITTER

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# No Anonymous

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# Policies

- Editorial policy defining:
  - Content types: front-page news vs. static content
  - How content is developed, formatted, presented
  - Limitations on technical and graphic elements
  - Roles and responsibilities of publishers, editor etc.
- Standardization Policy
  - Compliance details for platform, templates and style guide
- Email Usage Guidelines & Policy
- Taxonomy (Managed Term Store)

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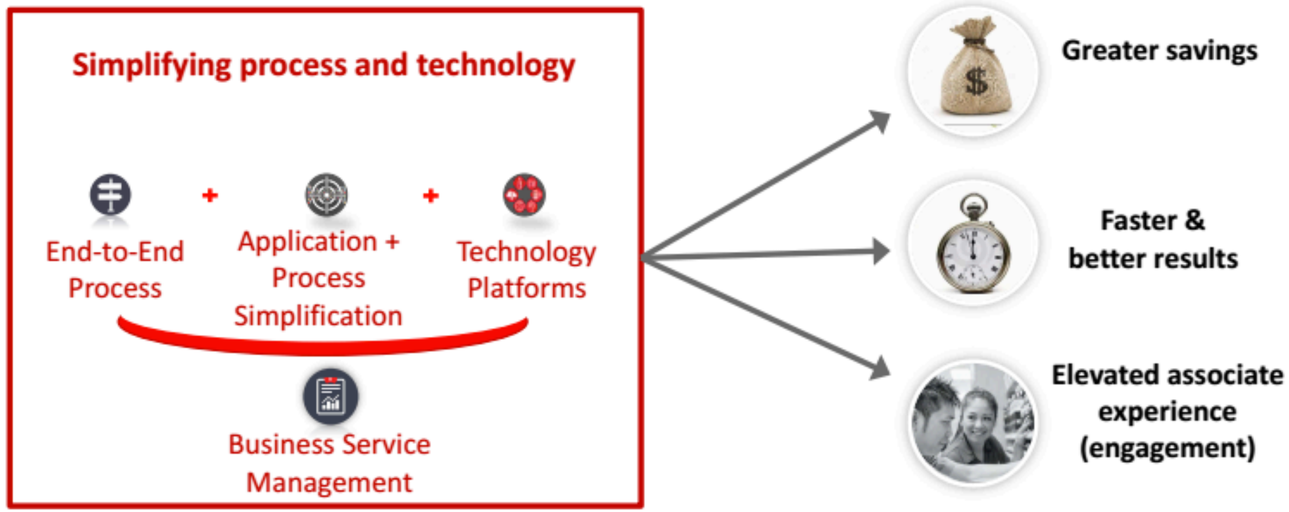
# Business Goals



## We Are Building a Culture of Speed and Agility

## This Focus Will Also Enable New Ways of Working to Drive Efficiency and Effectiveness




**Zero-Based Work Underpins Everything We Do**

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# Consolidation of Multiple Intranets



Many Sites Around The World

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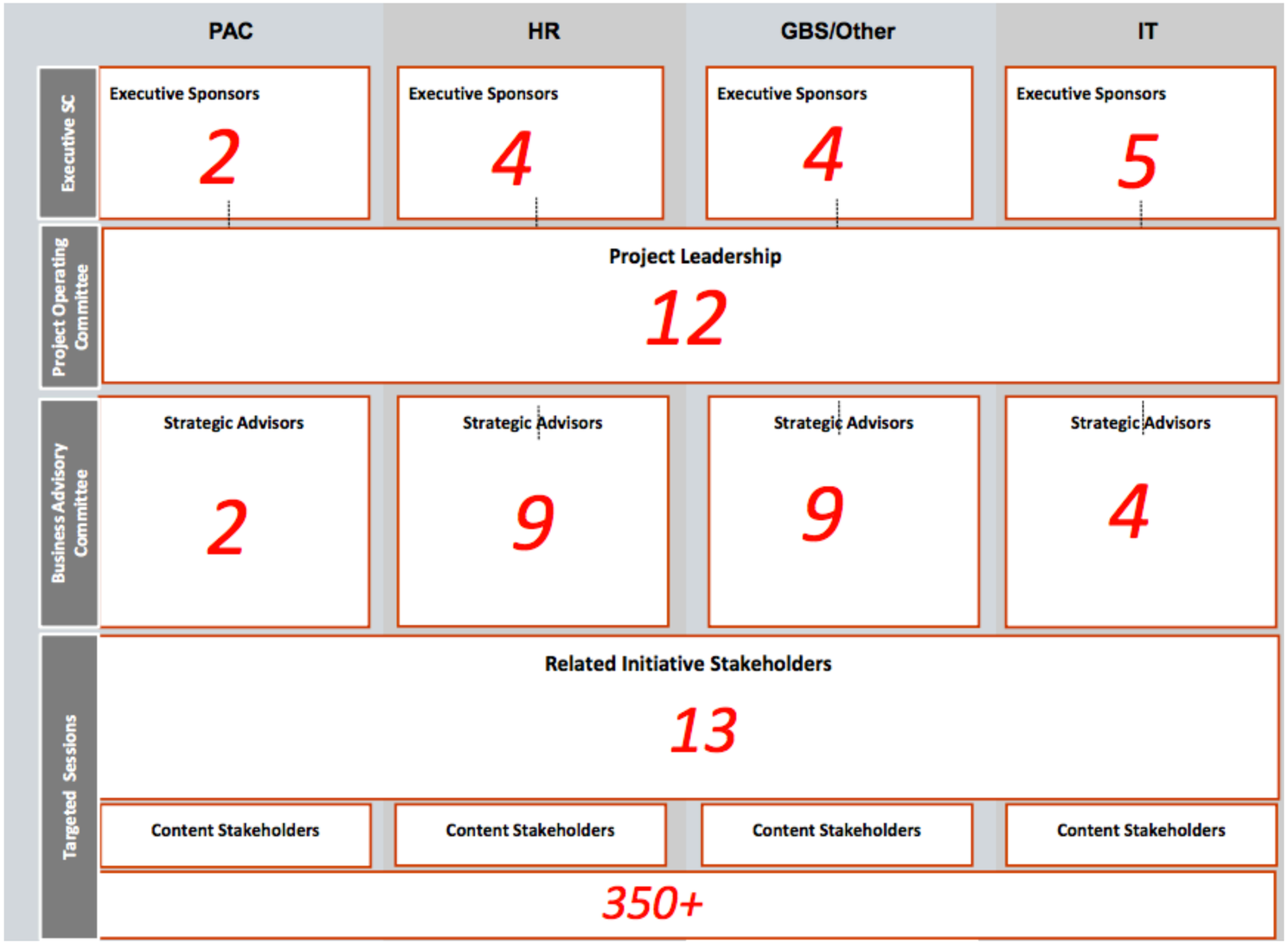
# Governance Is Key

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# User-Centric Design

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# Personas

## Segmenting Employee Population by Role

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# Personas

Segmenting by role & priorities

| Team Name | Search | Files | Data | Forms | Tools | Navigation | Policies |
|---|---|---|---|---|---|---|---|
| Peter | ● | ● | ● | ● | ● | ● | ● |
| Andrea | ● | ● | ● | ● | ● | ● | ● |
| Jessi | ● | ● | ● | ● | ● | ● | ● |
| Joe | ● | ● | ● | ● | ● | ● | ● |
| Kimberly | ● | ● | ● | ● | ● | ● | ● |
| Diego | ● | ● | ● | ● | ● | ● | ● |

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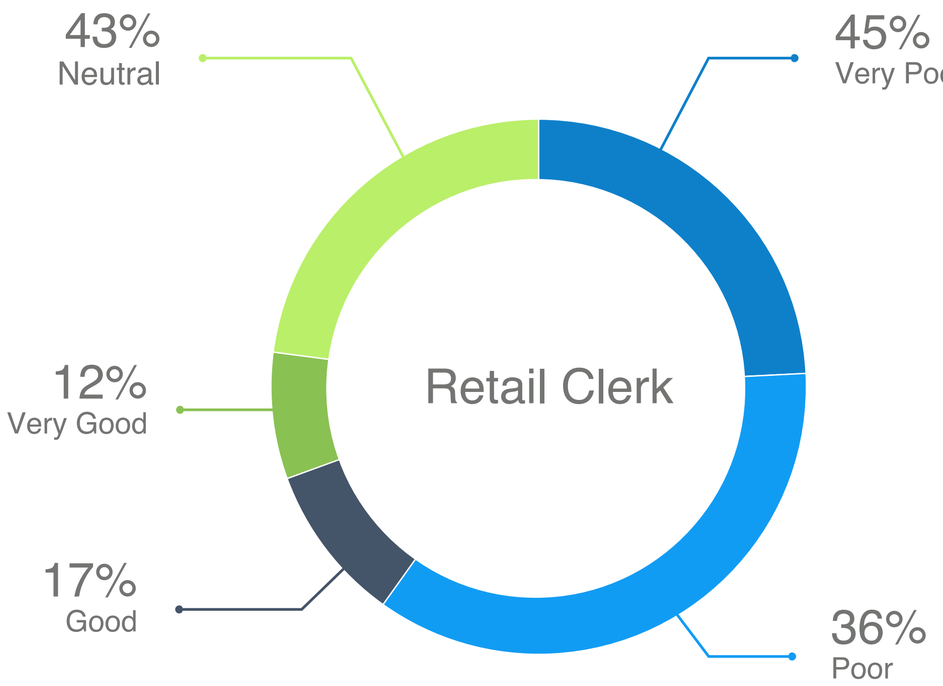
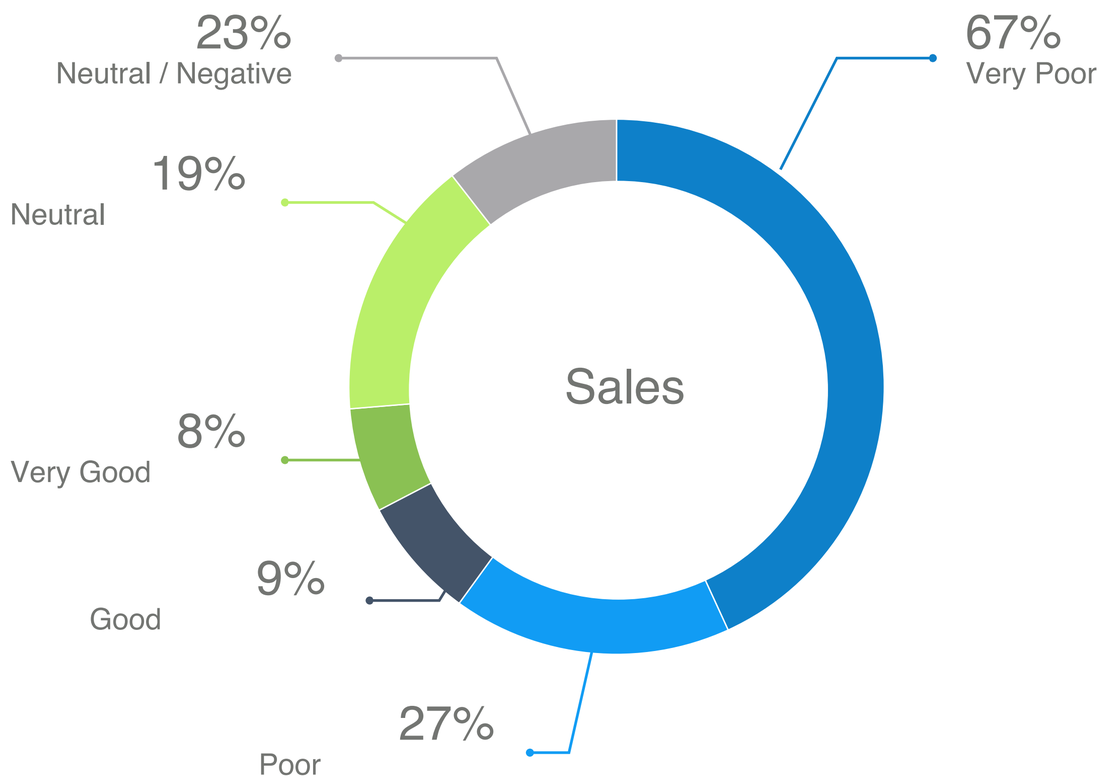
# Persona Segmentation

Data driven personas

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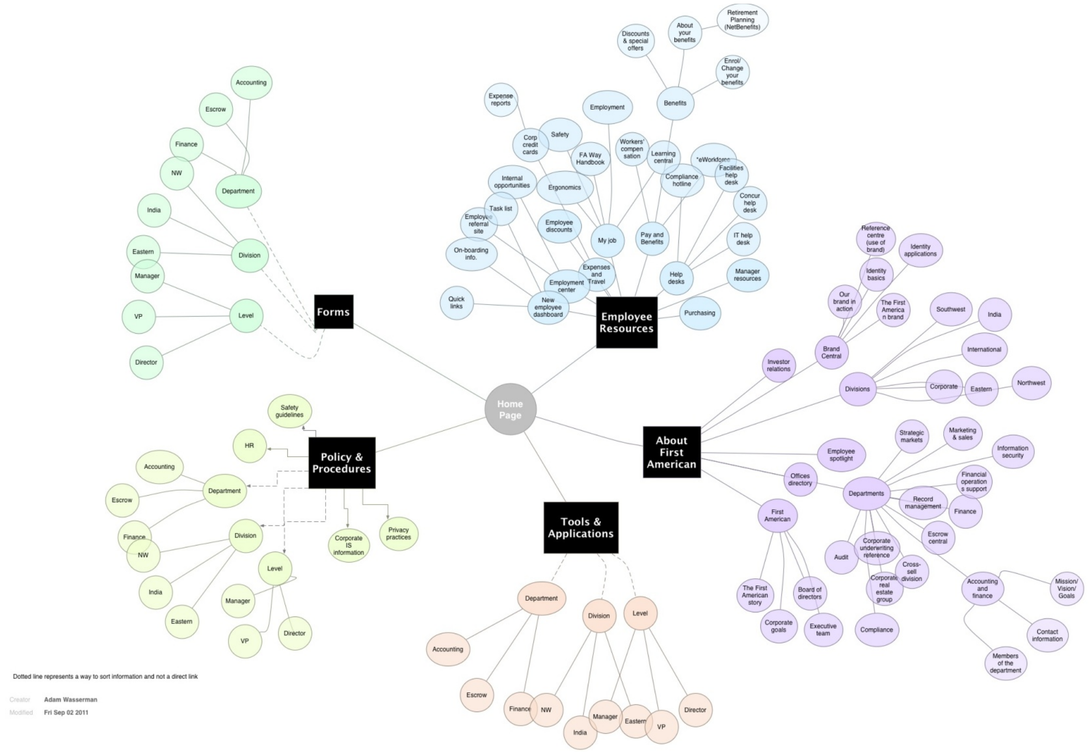
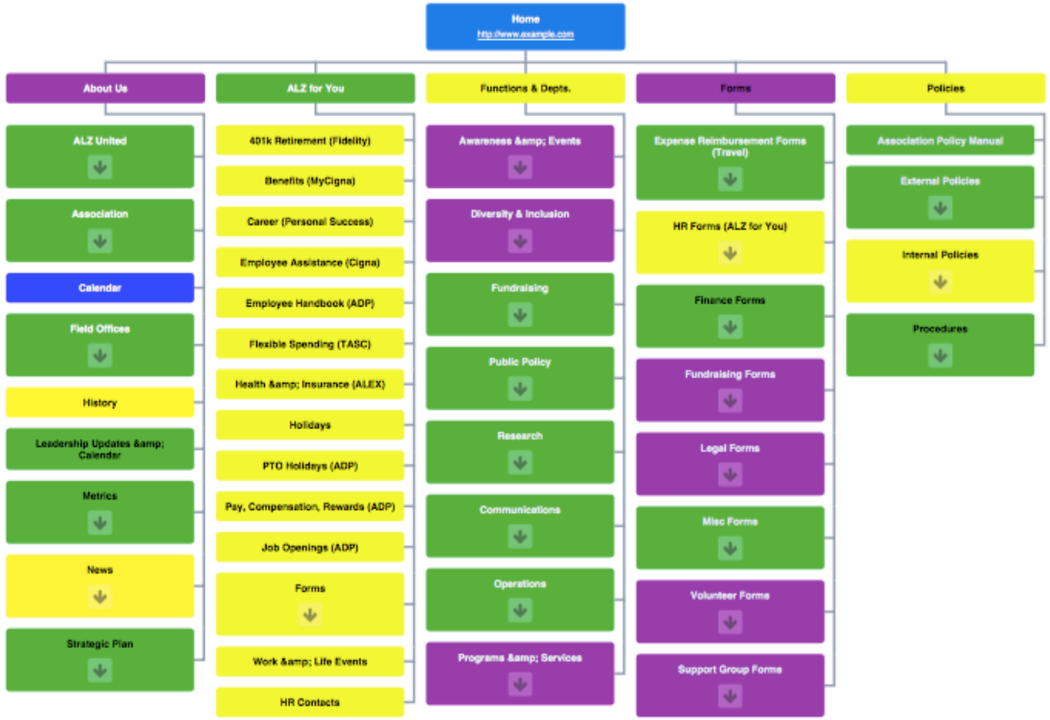
# Information Architecture



## Content categorization & navigation flows

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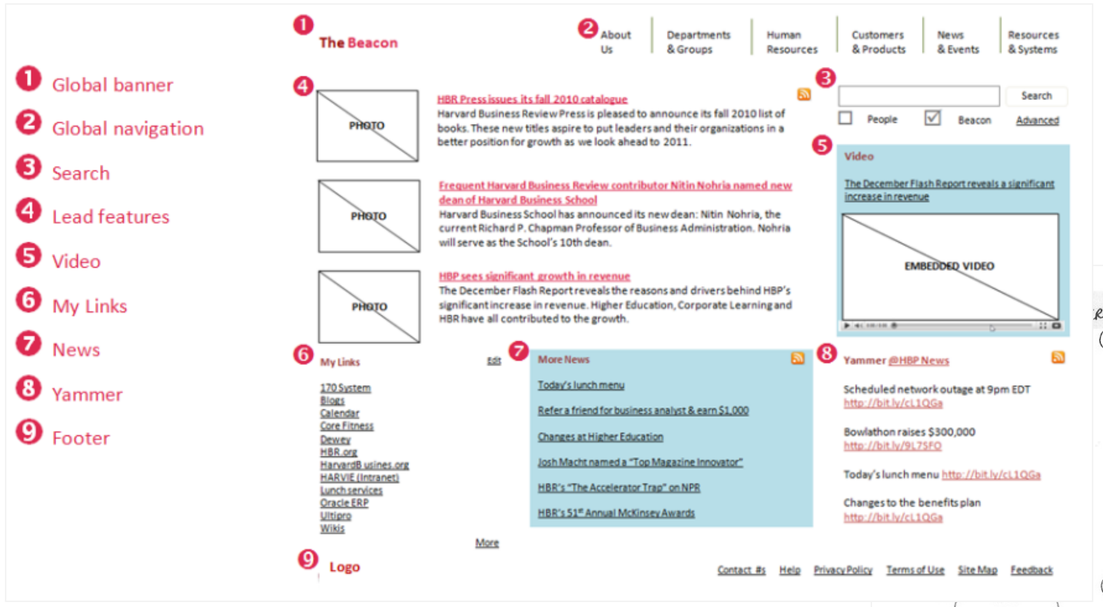
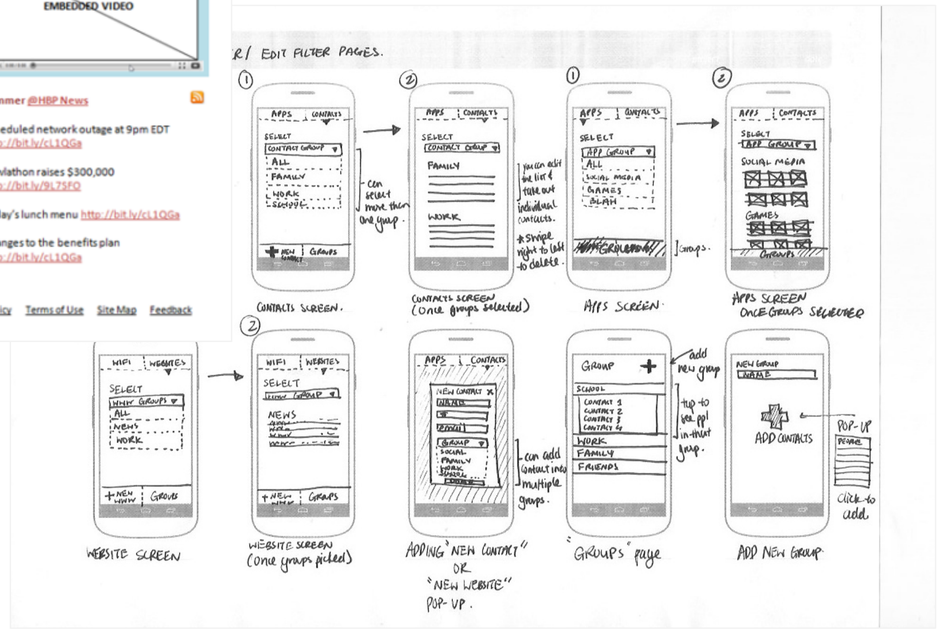
# Wireframes

## Spatial layouts and flows

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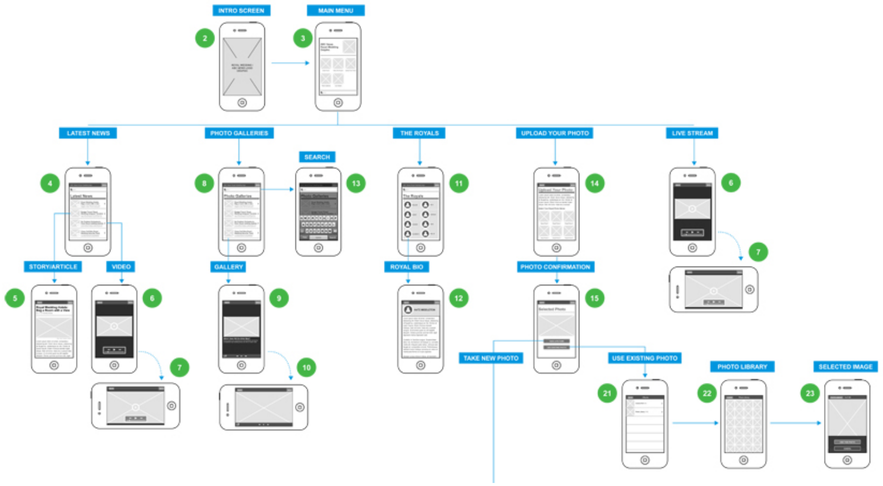
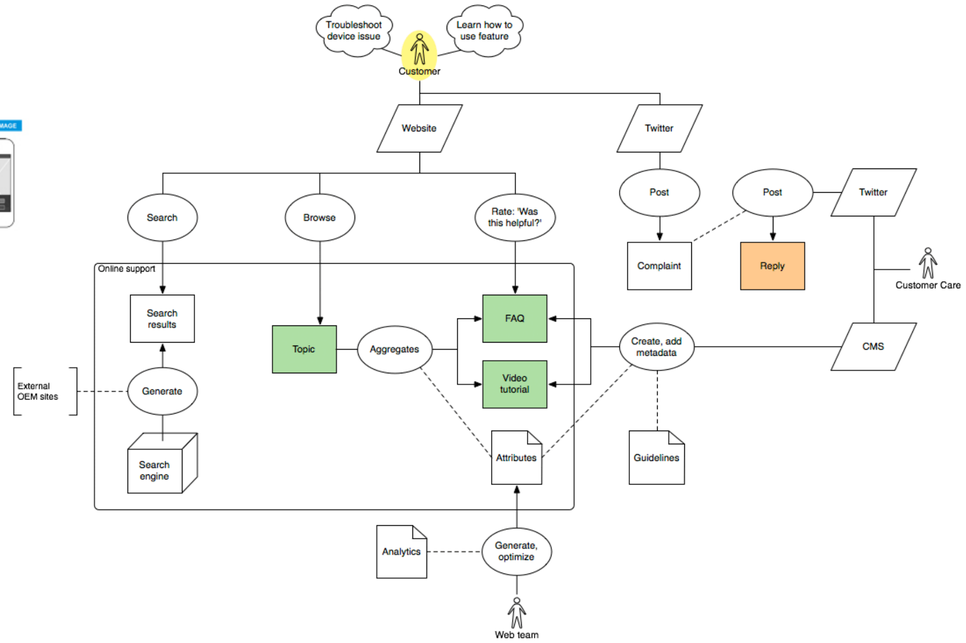
# User Experience Flows



## Persona driven navigation paths

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# Design Brief

## Design rules & guidelines

- Brand guidelines
- Color palette
- Font types, sizes, headers, etc
- Use of images / icons
- Technical parameters / limitations

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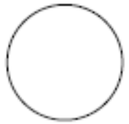
# Branding

## Aligning & supporting corporate brand

| Main Palette | | | | |
|---|---|---|---|---|
| | | |  |  |
| Dark Blue | Light Blue | Red | White | Grey |
| #0053A0 | #009ADA | #EE1C23 | #FFFFFF | #D1D2D4 |
| **Expanded Palette** | | | | |
| |  | |  |  |
| #73A5C9 | #B9D2E4 | #990000 | #EEEEEE | #CCCCCC |

It is important that these color conventions remain consistent for usability

**Dark Blue** is reserved for Links
**Red** is reserved for Rollover Stage of links and navigation elements
**Expanded palette** is used for backgrounds borders and other graphic elements.

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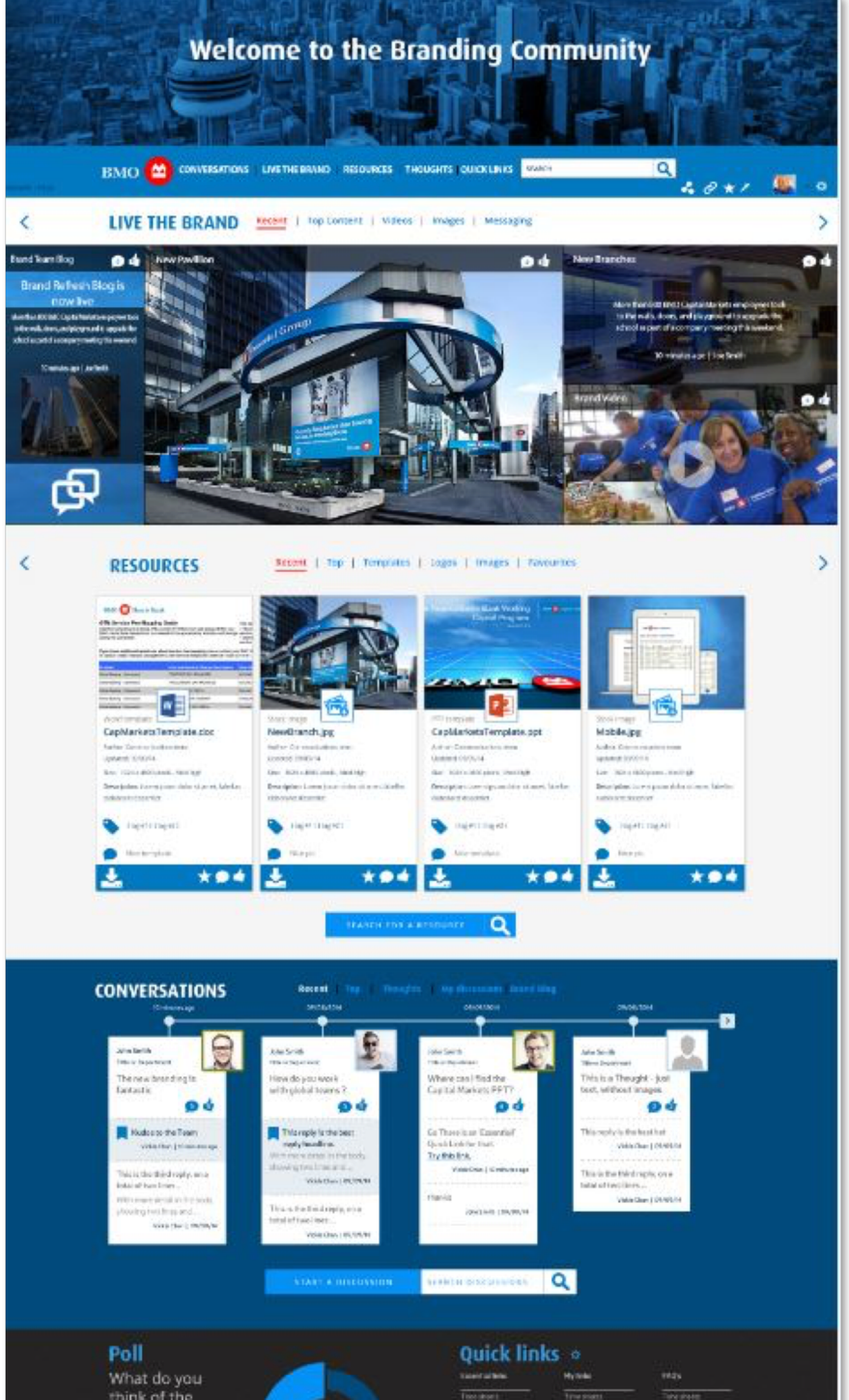


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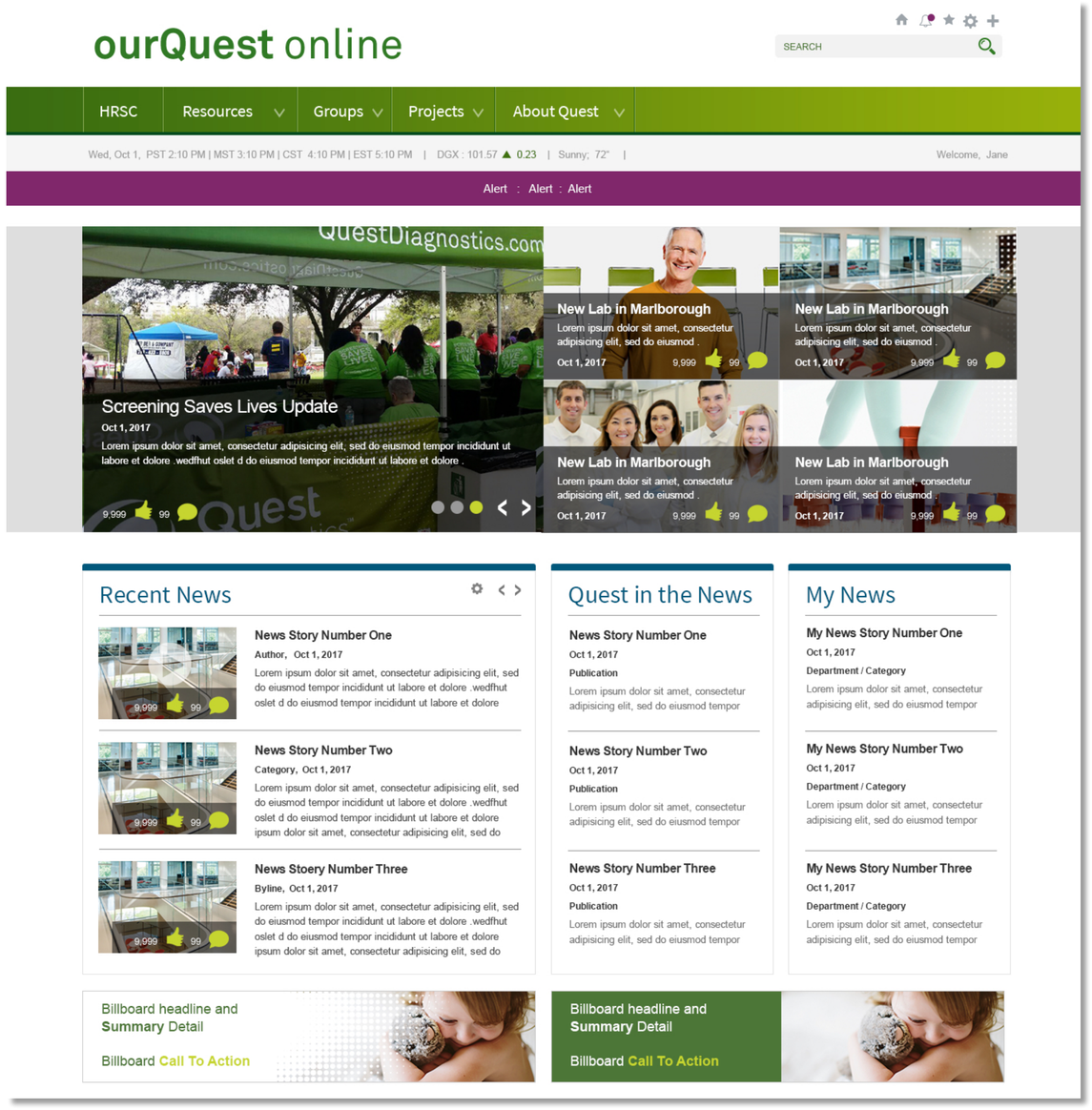


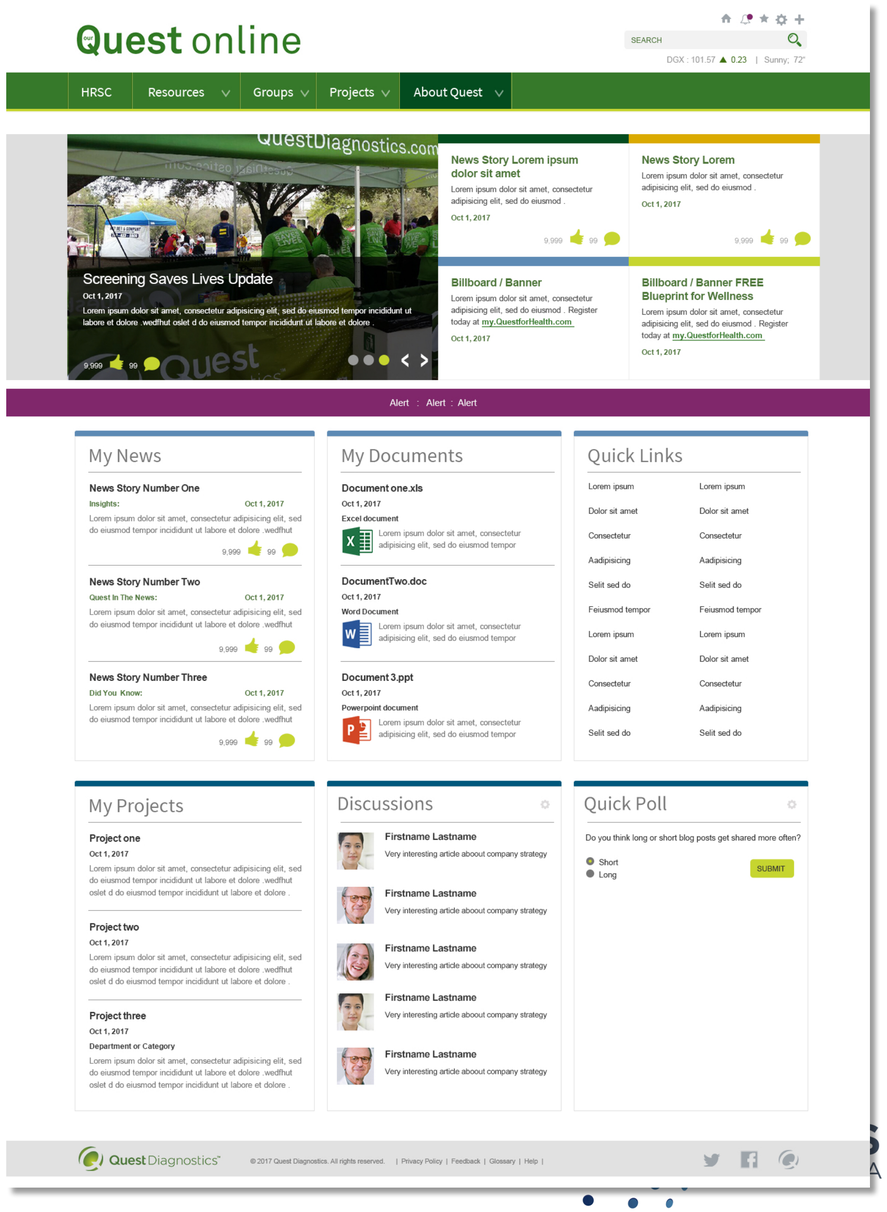


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# Questions

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# Intranet Insight Newsletter

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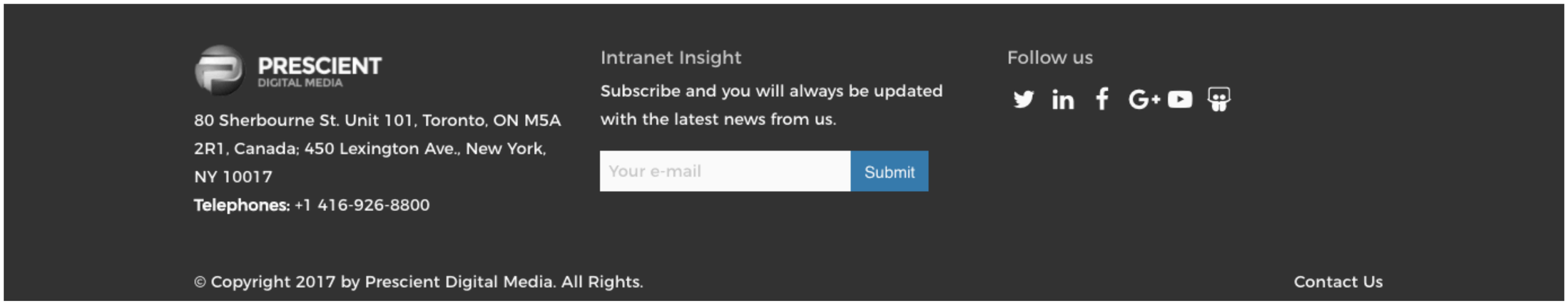


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# IntranetGlobalForum.com

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