



# Intranet 2.0

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Social media becomes mainstream  
on the corporate intranet

By Toby Ward

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# Introduction

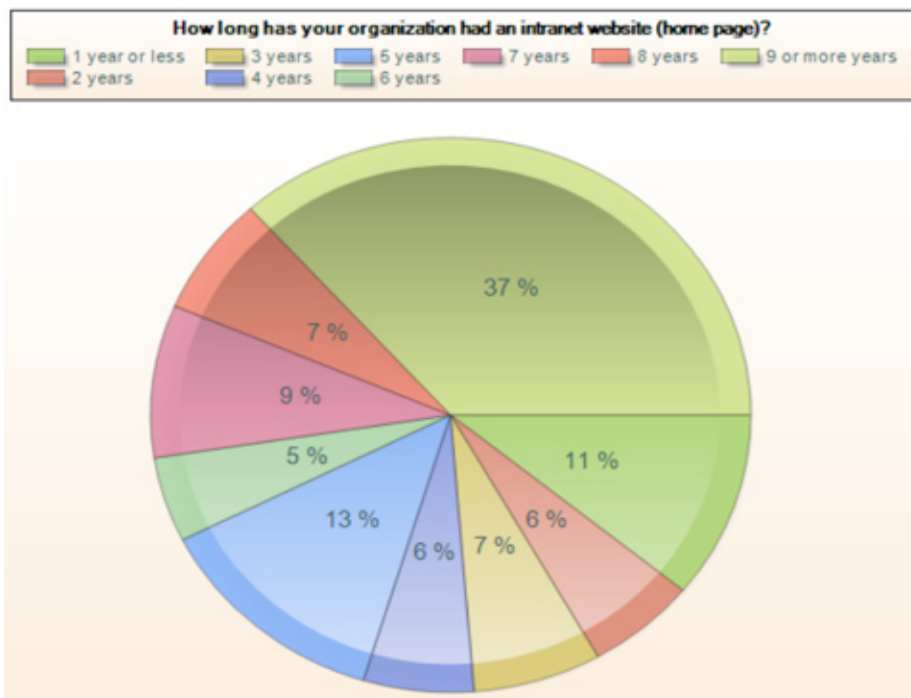
561 organizations of all sizes from across the planet participated in the Intranet 2.0 Global Survey and the results reveal rapid adoption of social media on the corporate intranet in the past year or two. The survey was led by Toby Ward, President, Prescient Digital Media, and conducted online between the fall of 2008, and Spring 2009.

## Geographical representation:

- 36% of respondents/organizations are from the U.S
- 24% from Europe
- 11% from Canada
- 11% from Australia / New Zealand
- 10% from UK
- 8% from Asia, Africa, South & Central America

## Intranet size (Employees with access):

- 61% of the organizations have more than 1,000 employees
- 32% have 6,000 or more employees
- 39% have less than 1000 employees



### **Intranet maturity:**

- 53% of organizations have had an intranet for 7 or more years
- 17% of organizations have had an intranet for 2 years or less

### **Organizations by industry:**

- 13% of the organizations are government
- 13% from technology
- 12% from financial services
- 6% from healthcare
- 5% from each media/entertainment, B2B, non-profit, & telecommunications
- 4% from energy as well as manufacturing and retail/consumer goods

### **For more information**

For more information on the Intranet 2.0 Global Survey or for help identifying, planning and implementing Intranet 2.0 tools, please contact Prescient Digital Media directly via the website ([www.PrescientDigital.com](http://www.PrescientDigital.com)) or phone 416.926.8800.

# Executive Summary

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An organization without a 2.0 strategy risks being left behind or outright failure (death may be slow).

Once a nice-to-have or a future wish, Intranet 2.0 tools such as blogs, wikis and other vehicles have become mainstream, and are present in nearly 50% of organization intranets (regardless of size) in North America, Europe, and Australia and New Zealand.

Intranet blogs, wikis and discussion forums are quite pervasive, while podcasts and mashups remain an after-thought at most organizations:

- 47% have intranet wikis (17% enterprise deployment); 10% have no plans or interest
- 46% have intranet discussion forums (19% enterprise use); 9% have no plans or interest
- 46% have intranet instant messaging (29% enterprise use); 21% have no plans or interest
- 45% have intranet blogs (13% enterprise deployment); 11% have no plans or interest
- 37% have intranet RSS (13% enterprise use); 12% have no plans or interest
- 23% have intranet podcasts (6% enterprise deployment); 30% have no plans or interest
- 21% have intranet content tagging (9% enterprise use); 24% have no plans or interest
- 19% have intranet social networking (6% enterprise use); 20% have no plans or interest
- 8% have intranet mashups (3% enterprise use); 45% have no plans or interest

## Technology platforms

Less than two-third's of organizations use a CMS for their intranet (63%):

- 25% use a custom built CMS (home grown CMS)
- 25% use an off-the-shelf solution CMS
- 11% use a portal solution
- 20% use a hybrid/combination
- 10% use open source

While a CMS is the most popular technology platform to power an intranet, there is no dominant CMS solution – no one vendor has more than 20% market share:

- Microsoft SharePoint is used by 20% of those that use a CMS
- Interwoven, Documentum and Vignette each have 4% market share
- No other solution was cited by more than 8 organizations (2.5% share)



## SharePoint & other Intranet 2.0 solutions

Microsoft is leading the 2.0 charge and dominating all the competition. For those organizations that have deployed 2.0 tools inside the firewall, about half of all organizations have SharePoint (in some shape or form). No other vendor is used in more than 20% of organizations (some organizations use multiple solutions):

- 48% of organizations use SharePoint
- 20% of organizations use Facebook
- 17% of organizations use MediaWiki
- 16% of organizations use WordPress
- 13% of organizations use Confluence

Despite all the hype and regular attention and press they receive, SocialText and Lotus Connections (Quickr) are only present in 3% and 4% of organizations respectively.

## Cost of Intranet 2.0

Intranet 2.0 is cheap. Of those organizations that have implemented 2.0 tools, almost half have spent \$10,000 or less on these tools:

- 46% have spent \$10,000 or less
- 35% have spent between \$10,000 and \$100,000
- 19% have spent \$100,000 or more

## Satisfaction

Satisfaction levels with Intranet 2.0 tools remain satisfactory or poor:

- Only 29% of organizations rate the tool functionality as good or very good; 24% rate them as poor or very poor
- Satisfaction rates with executives is dangerously low: only 23% of executives rate the 2.0 tools as good or very good; 38% rate them as poor or very poor

## Barriers to implementation

Without a proper plan and business case, many organizations will fail to properly implement Intranet 2.0 technologies. Those organizations that don't have 2.0 tools are not getting executive approval to proceed as they don't have a proper plan or business case that convinces senior management of the need.

Of those organizations that have not implemented Intranet 2.0 tools, lack of a business case, executive support, and IT support are the top barriers:

- 33% of respondents cite lack of executive support as the greatest challenge
- 31% of respondents say lack of IT support is the greatest barrier to implementation
- 30% of respondents cite lack of a business case as the greatest challenge

# Key Findings

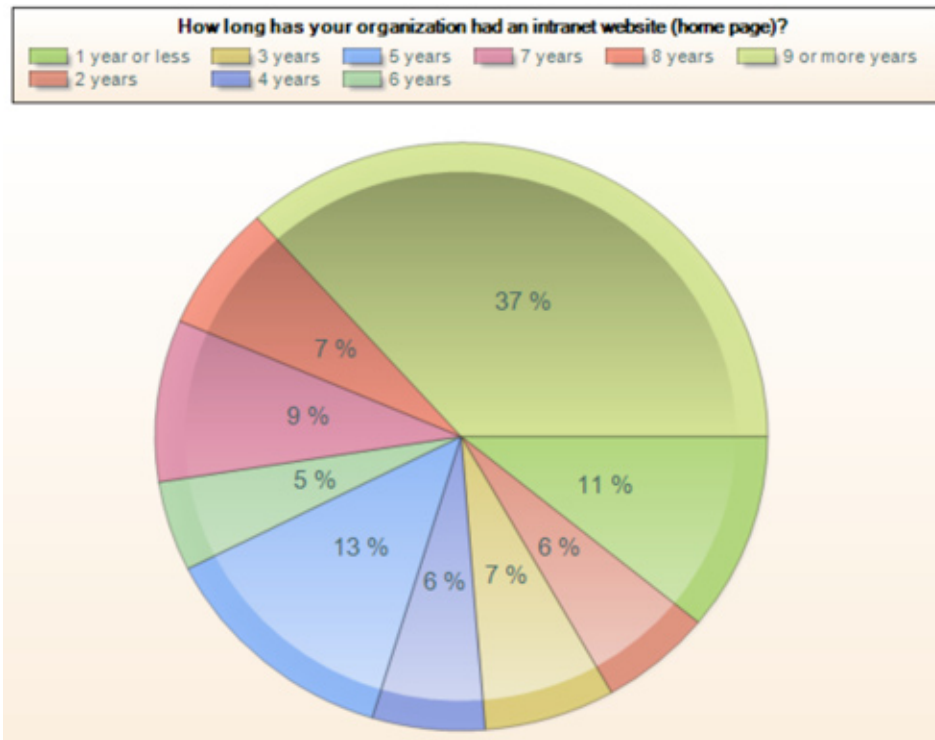
## Question 1: Intranet Age

How long has your organization had an intranet website (home page)?

### Findings:

Most organizations have had an intranet for many years:

- 53% of organizations have had an intranet for 7 or more years
- 71% of organizations have had an intranet for 5 or more years
- 17% of organizations have had an intranet for 2 years or less
- Only 11% of organizations have had an intranet for one year or less



### Analysis:

Most organizations have had intranet for many years, and those intranet home pages have had at least one or two redesigns. While not all organizations have intranets, they are in the minority and badly lagging the rest of the business field when it comes to electronic employee communications.

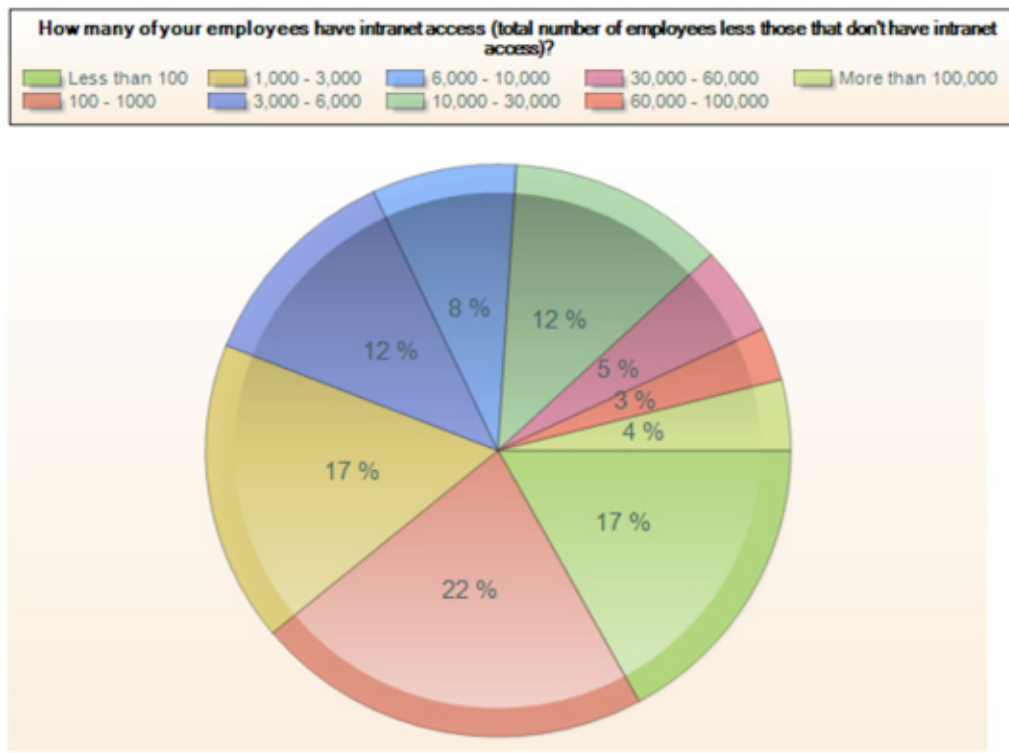
## Question 2: Employee Access (Intranet Size)

How many of your employees have intranet access (total number of employees less those that don't have intranet access)?

### Findings:

The survey sample is a fairly accurate, cross-representative sample of organizations by size:

- 61% have more than 1,000 employees
- 32% have 6,000 or more employees
- 39% have less than 1,000 employees
- 24% have 10,000 or more employees
- 7% have 60,000 or more employees



### Analysis:

Roughly one-third of the respondents would be classified as “large organizations” with 6,000 or more employees; roughly one-third of respondents would be classified as “medium-size organizations” with 1,000 to 6,000 employees; and approximately one-third of the organizations would be classified as “small” with 1,000 employees or less.

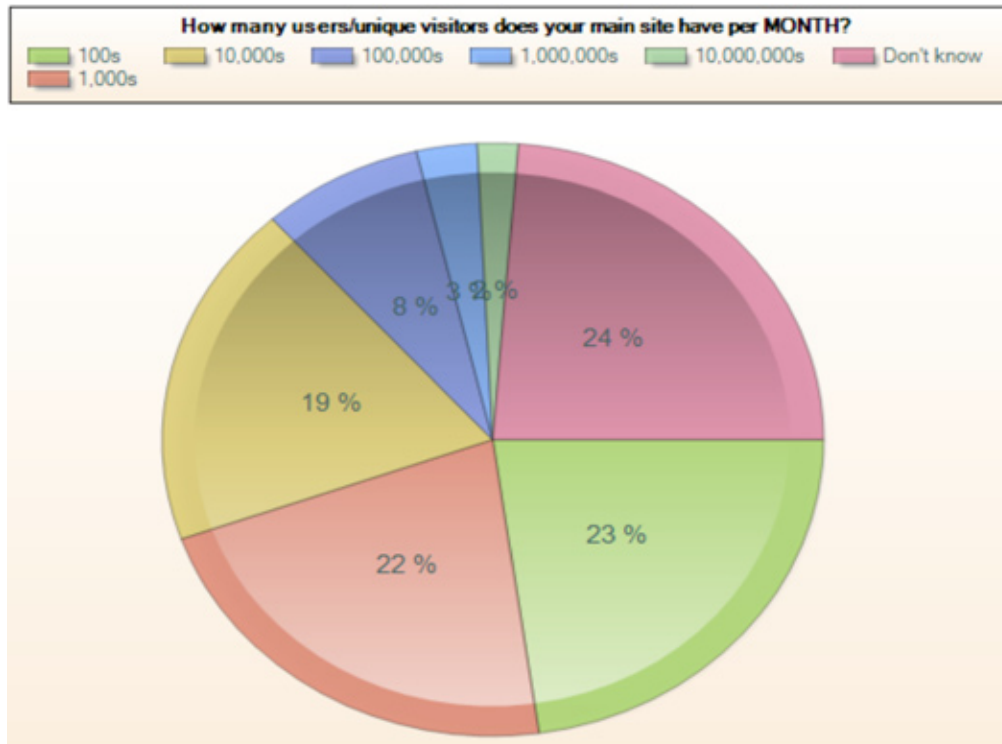
### Question 3: Intranet Use

How many users/unique visitors does your main site have per month?

#### Findings:

Nearly a quarter of organizations don't know how often employees are using the intranet:

- 24% don't know the user traffic of their intranet
- 45% of organizations measure their unique visits for a month in hundreds or thousands
- Only 5% of respondents have unique visits in the millions



#### Analysis:

An employee can only register a unique visit once per day, even if they visit the intranet more than once, to a maximum of 30 unique visits per month (30 day month) by a single employee. The findings therefore show that intranet usage is very low. For example, a look at the cross-tabulation of organizations finds that 37% of the respondents of 1,000 – 3,000 employees measure their monthly unique visitors in the hundreds or thousands. If only half of all employees went to the intranet every day, that alone would register 450,000 unique visits alone (not counting the traffic of the other half). Yet 37% of these organizations have user traffic that is dwarfed by this threshold (number), and one-quarter of organizations don't measure traffic at all.

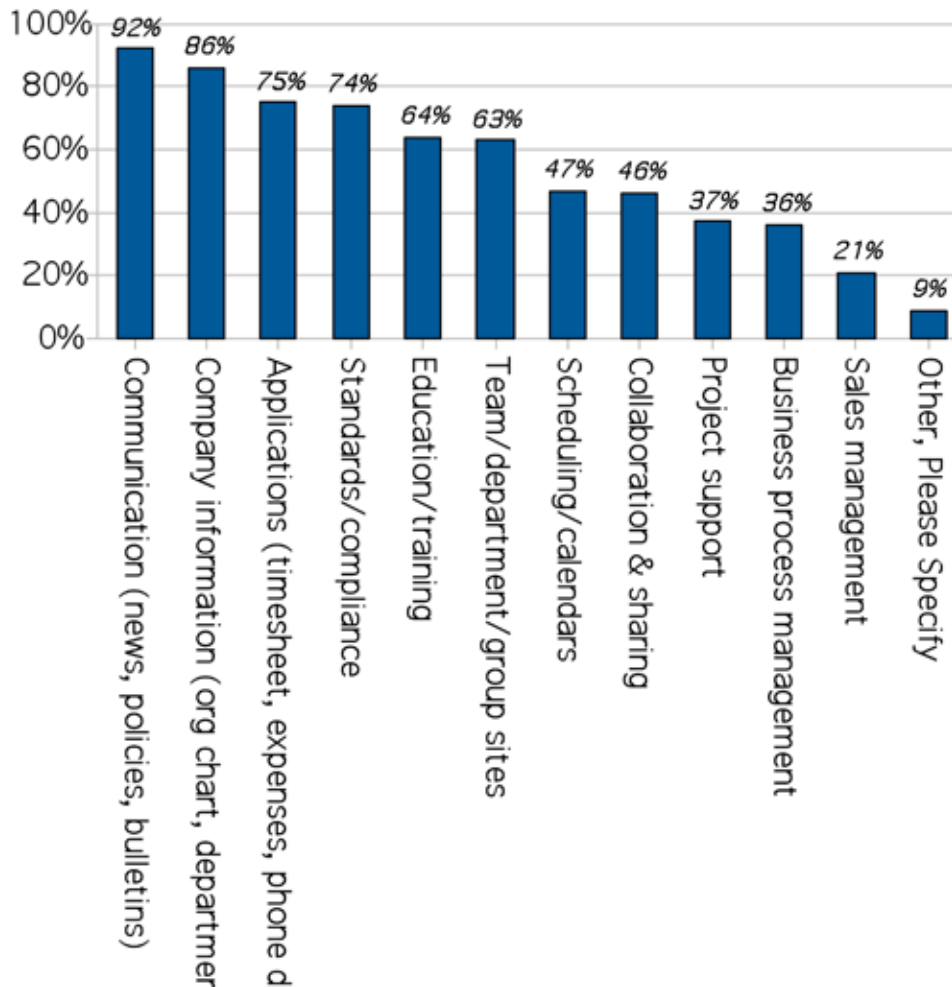
## Question 4: Intranet Functions

What does your intranet offer? Check all that apply.

### Findings:

Traditional corporate communications information dominate most intranets:

- 92% have communication information such as news and policies
- 86% have company information such as org. charts, company vision, values, etc.
- 75% feature applications such as phone directories, expense reporting, etc.
- Despite the importance of sales to the organization, only 21% have sales management features



### Analysis:

Most intranets continue to focus on static content, while high-value tools and applications relating to sales, HR and business processes continue to take a backseat. Collaboration & sharing tools (46% of organizations), such as Intranet 2.0 applications, are examined in later questions.

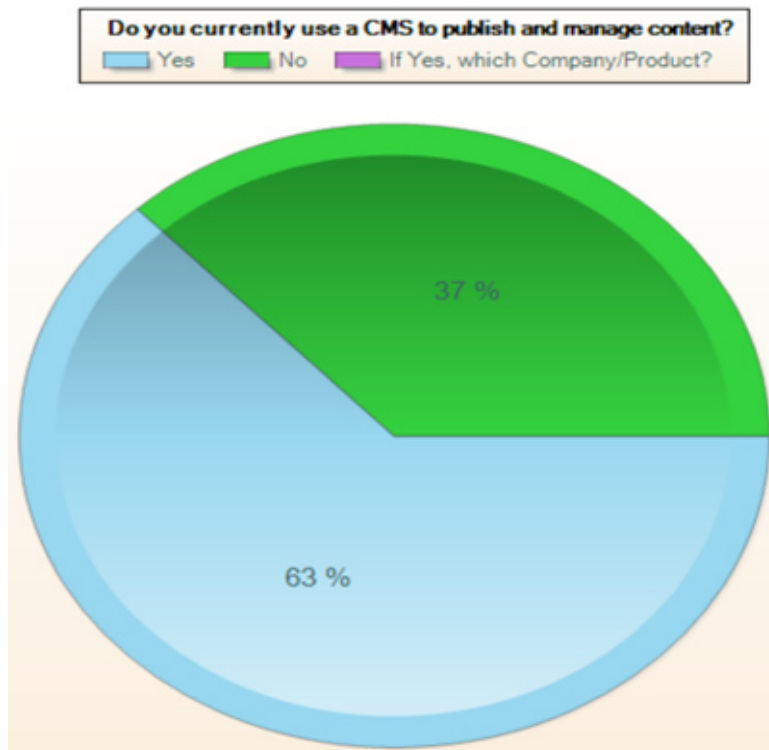
## Question 5: Content Management

Do you currently use a CMS to publish and manage content?

### Findings:

Only 2/3rds of organizations use a CMS. Of those organizations using a CMS, no one solution dominates the market:

- Microsoft SharePoint is used by 20% of those that use a CMS
- Interwoven, Documentum and Vignette each have 4% market share
- No other solution was cited by more than 8 organizations (2.5% share)



### Analysis:

Clearly SharePoint has an edge over the competition, but it does not dominate the CMS marketplace: only 20% of the respondents are using it as a CMS. For those that have implemented Intranet 2.0 tools, SharePoint (MOSS 2007) is present in 46% of the organizations (though some organizations are using multiple tools including SocialText, Confluence and MediaWiki). In other words, SharePoint is being used as a CMS, but content management is not its strength. SharePoint is more often being used for collaboration and portal functionality.

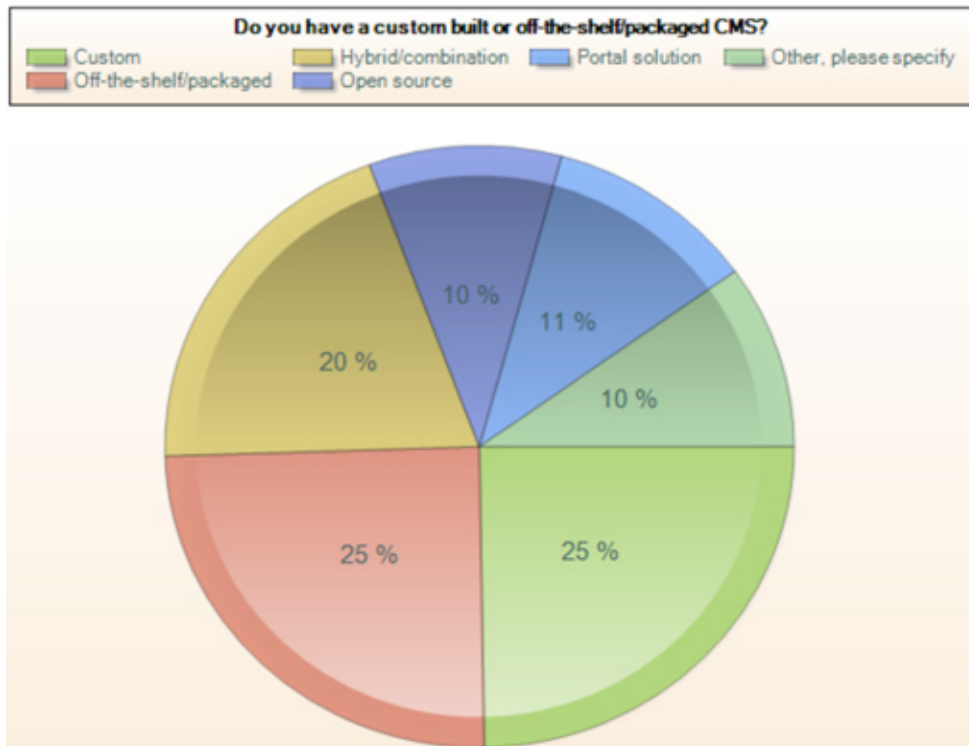
## Question 6: Technology Platform

Do you have a custom built or off-the-shelf/package CMS (or something else)?

### Findings:

CMSs are more popular than portal solutions as the principal platform powering the intranet, but nearly half (45%) of all intranets are powered by custom built or hybrid solutions.

- 25% of intranets use a custom-built CMS
- 25% of intranets use an off-the-shelf (OTS) solution
- 11% of intranets are powered by portal solutions



### Analysis:

The more complex, and expensive portal solutions are present only in a small minority of organizations. Although an examination of the cross-tabulation results by company size (employee access to the intranet) reveals the use of portal solutions are quite consistent across the segments by size, they are slightly more common on the larger organizations of more than 6,000 employees. CMS solutions continue to power most intranets, but only one-quarter are exclusively OTS solutions. Prescient believes that a majority of organizations will surely invest money into brand-name CMS and portal solutions in the next two years.



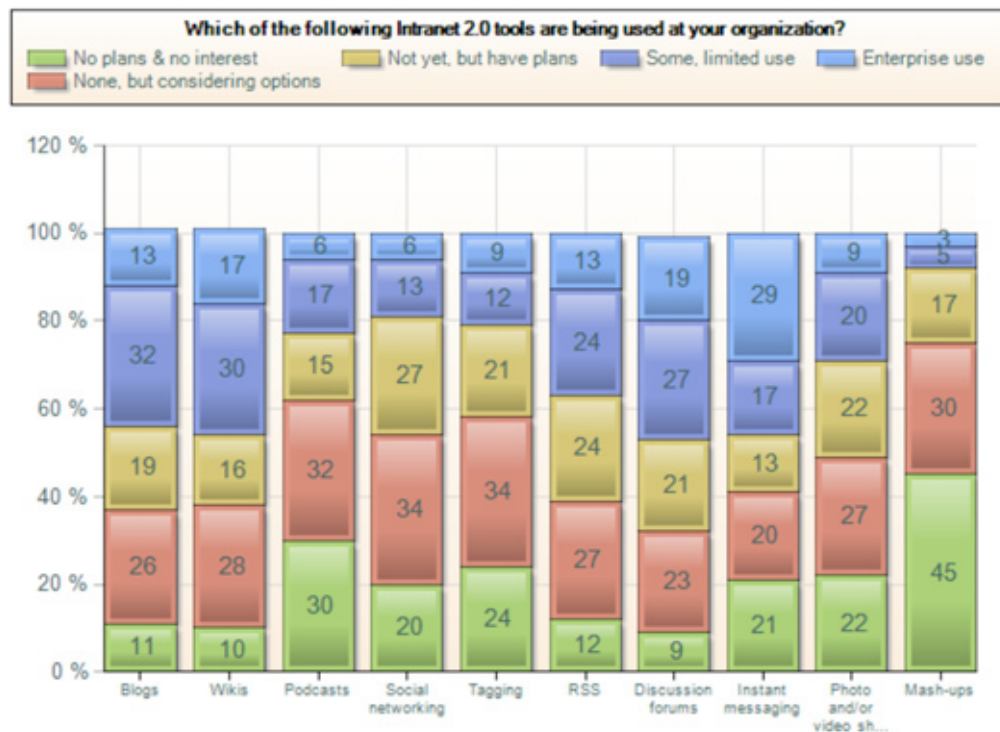
## Question 7: Intranet 2.0 Tools

Which of the following Intranet 2.0 tools are being used at your organization?

### Findings:

Intranet 2.0 tools such as blogs and wikis have become mainstream, and are present in nearly 50% of organization intranets (regardless of size) in North America, Europe, Australia & New Zealand:

- 47% have intranet wikis (17% enterprise deployment); 10% have no plans or interest
- 46% have intranet discussion forums (19% enterprise use); 9% have no plans or interest
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- 23% have intranet podcasts (6% enterprise deployment); 30% have no plans or interest
- 19% have intranet social networking (6% enterprise use); 20% have no plans or interest



## **Analysis:**

An organization without Intranet 2.0 tools, or plans to use them, risks being outmanoeuvred by the competition. While podcasts and photo & video sharing are not well used, and have questionable value when compared to other alternatives, wikis in particular are becoming mission-critical tools. Blogs, social networking, tagging, RSS, discussion forums & mash-ups can also contribute legitimate business value and will continue to increase in popularity. An organization without a 2.0 strategy risks being left behind, or outright failure (death may be slow).

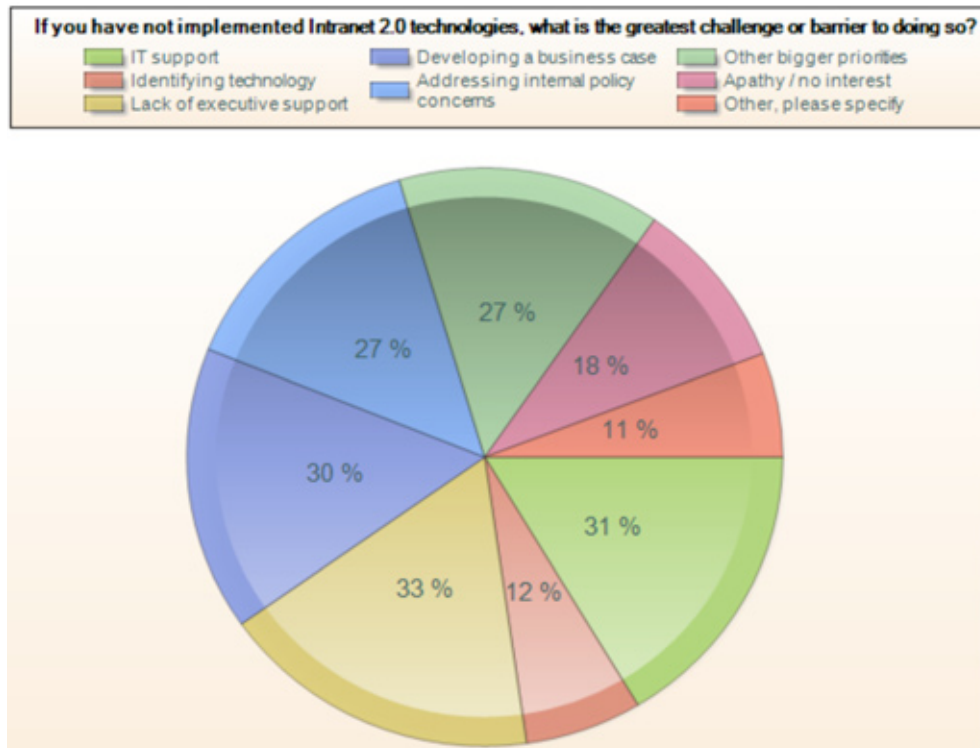
## Question 8: Challenges / Barriers

If you have not implemented Intranet 2.0 technologies, what is the greatest challenge or barrier to doing so?

### Findings:

Of those organizations that have not implemented 2.0 tools, lack of a business case, executive support, and IT support are the top barriers:

- 33% of respondents cite lack of executive support as the greatest challenge
- 31% of respondents say lack of IT support is the greatest barrier to implementation
- 30% of respondents cite lack of a business case support as the greatest challenge
- 27% cite internal policy concerns as the biggest barrier (intimately related to executive support)



### Analysis:

Without a proper plan and business case, many organizations will fail to properly implement Intranet 2.0 technologies. Those organizations that don't have 2.0 tools will not get executive approval to proceed, as they don't have a proper plan or business case that convinces senior management of the need. Business cases need not always have hard ROI and other dollar-driven targets, but a clear need must be established. Each business case should cite employee needs (research) and external benchmarks and comparisons (competitive and industry benchmarks are preferred).

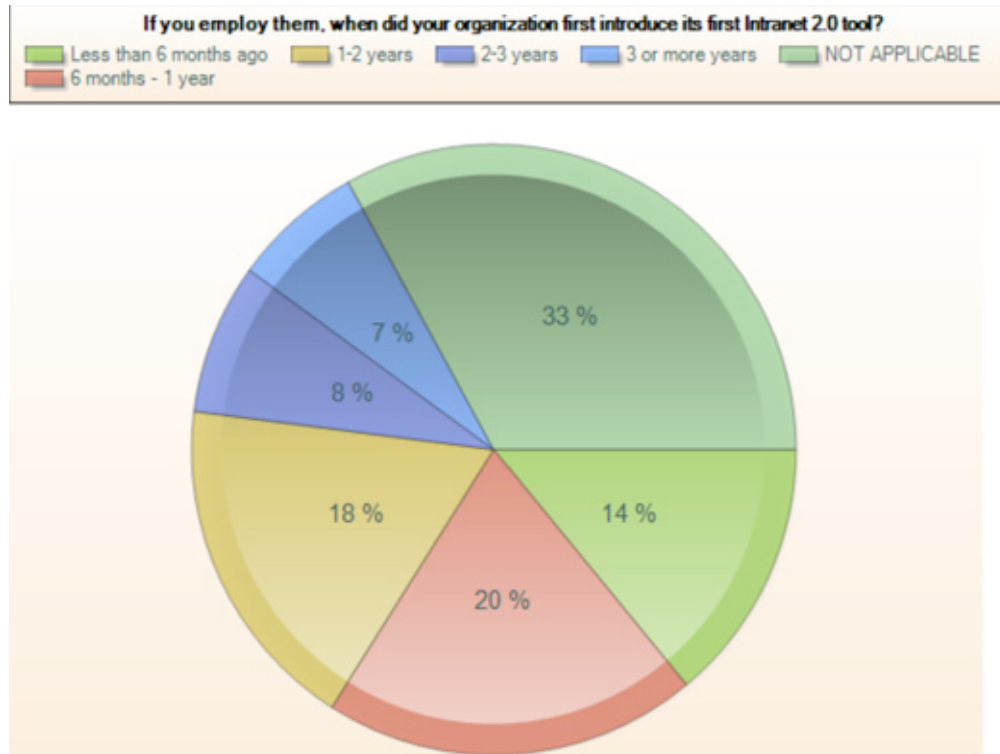
## Question 9: When?

If you employ them, when did your organization first introduce its first Intranet 2.0 tool?

### Findings:

Intranet 2.0 tools are still very new, and green:

- Only 15% of organizations have had Intranet 2.0 tools for more than 2 years
- 35% of organizations have had their Intranet 2.0 tools for less than 1 year



### Analysis:

Of the 50% or so of organizations that have Intranet 2.0 tools, half of those have had them for a year or less. While first mover advantage is gone for most organizations considering Intranet 2.0 tools, very few organizations have had 2.0 tools long enough to perfect their use, or to achieve a critical-mass of acceptance and use by employees.

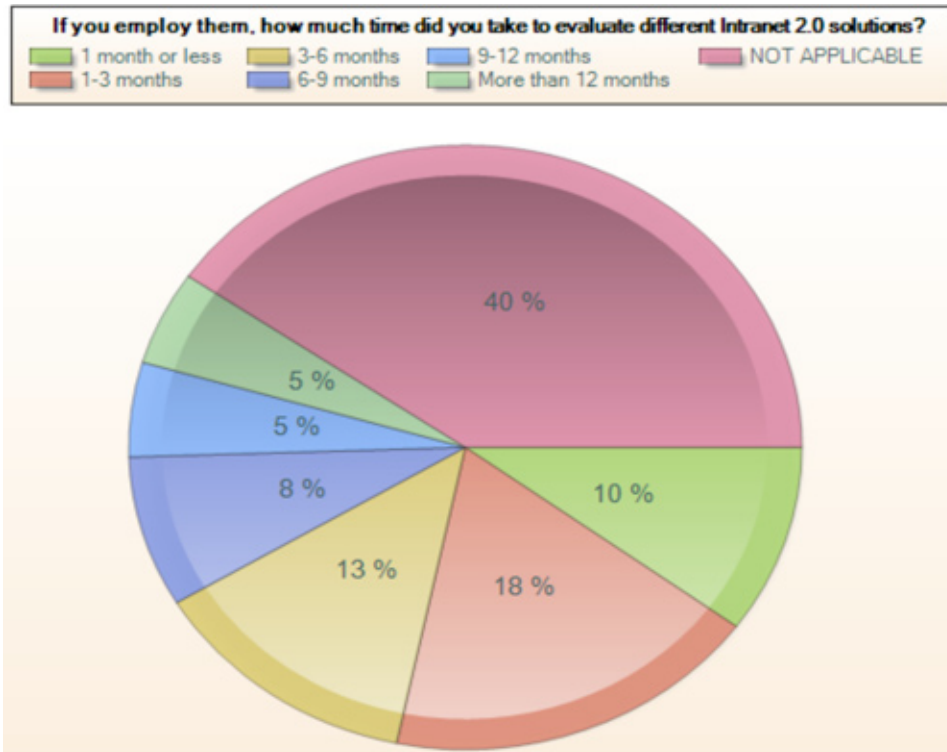
## Question 10: Evaluation Period

If you employ them, how much time did you take to evaluate different Intranet 2.0 solutions?

### Findings:

Nearly half (40%) of respondents have yet to evaluate any Intranet 2.0 tools, or have implemented tools with no evaluation period. Of those that did evaluate 2.0 tools (factoring out the non-applicable respondents):

- 48% spent less than 3 months evaluating different tools
- 30% spent 6 months or more evaluating different tools
- 22% spent between 3 and 6 months to evaluate different tools



### Analysis:

It is important for any organization to evaluate and choose the right technology and tools according to their business and functional requirements, rather than be sold a tool or piece of technology. 70% of those organizations that undertook Intranet 2.0 technology evaluations did so in 6 months or less. An evaluation period (including the requirements gathering and building the evaluation criteria) of 2-4 months per technology solution is considered best practice and par-for-the-course.

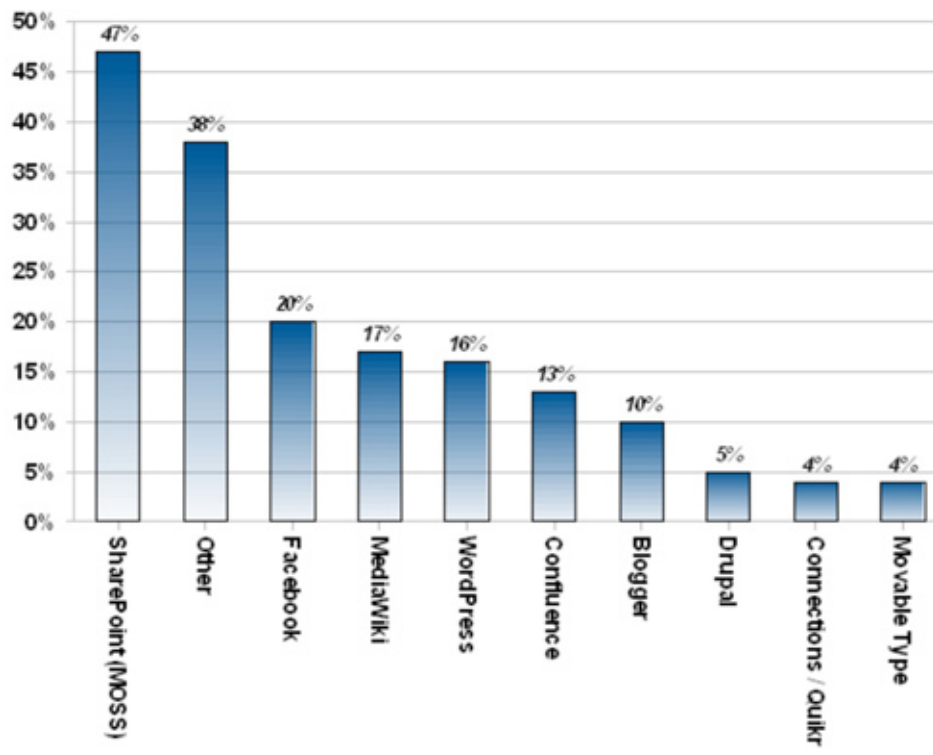
## Question 11: Products

What Intranet 2.0 product(s) do you use? Check all that apply.

### Findings:

One product, above all others stands above all of the vendor solutions used to power Intranet 2.0 tools:

- 47% of organizations with 2.0 tools are using Microsoft SharePoint (MOSS 2007)
- Facebook is being used by employees (employee groups) in 20% of organizations
- Seven Intranet 2.0 vendors have market share of more than 4% led by MediaWiki (17%) and WordPress (16%)
- Vendors (“others”) that have less than 4% market share are present in 38% of organizations



### Analysis:

SharePoint clearly dominates all other technologies. Nearly half of all companies have deployed SharePoint in some shape or form, and many are using it as the defacto platform for wikis, blogs, or integrating third-party plug-ins that work in connection with MOSS. Free services and open-source such as Facebook, MediaWiki, and Blogger are also in use. Few organizations are spending money outside of SharePoint for 2.0 tools, although Confluence is a clear leader (particularly for their wiki tools).

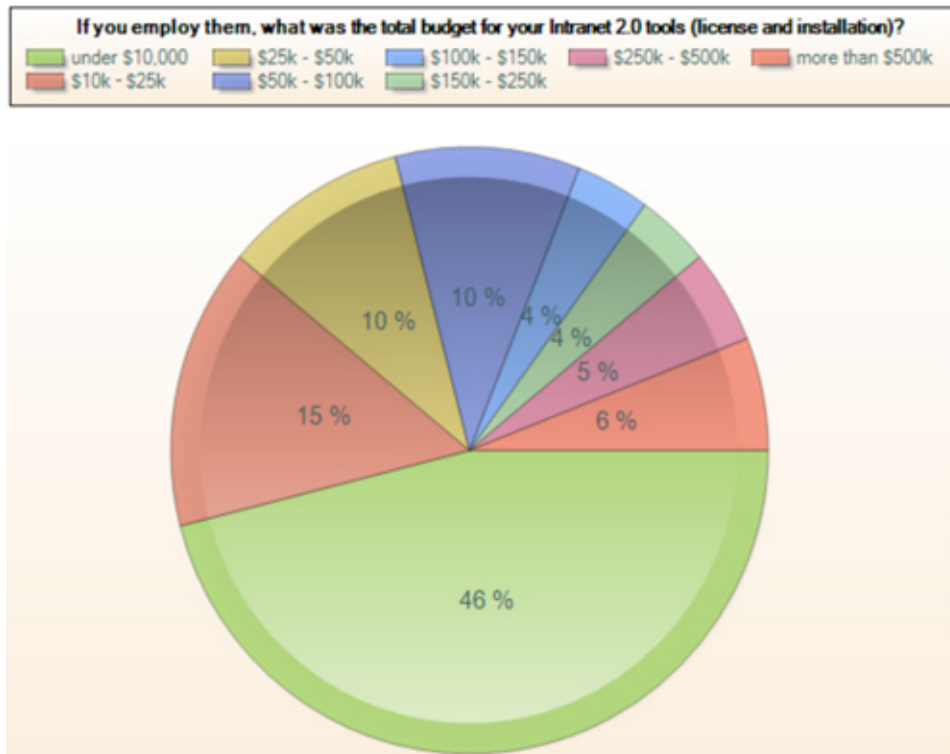
## Question 12: Price

If you employ them, what was the total budget for your Intranet 2.0 tools (license and installation)?

### Findings:

The cost of entry for most Intranet 2.0 tools is very minimal, if not free:

- 46% of organizations have spent \$10,000 or less
- 25% have spent between \$10,000 and \$50,000
- Only 19% have spent \$100,000 or more



### Analysis:

Wikis and blogs are comparatively inexpensive to implement, and many organizations use open-source solutions like WordPress and MediaWiki, or the tools that come bundled in SharePoint, or their respective CMS or portal solution. Solutions for social networking, content tagging and mashups tend to be more expensive and complex, and are less common in organizations. Many organizations start with open-source or bundled components as pilots before making a decision to invest in more robust solutions.

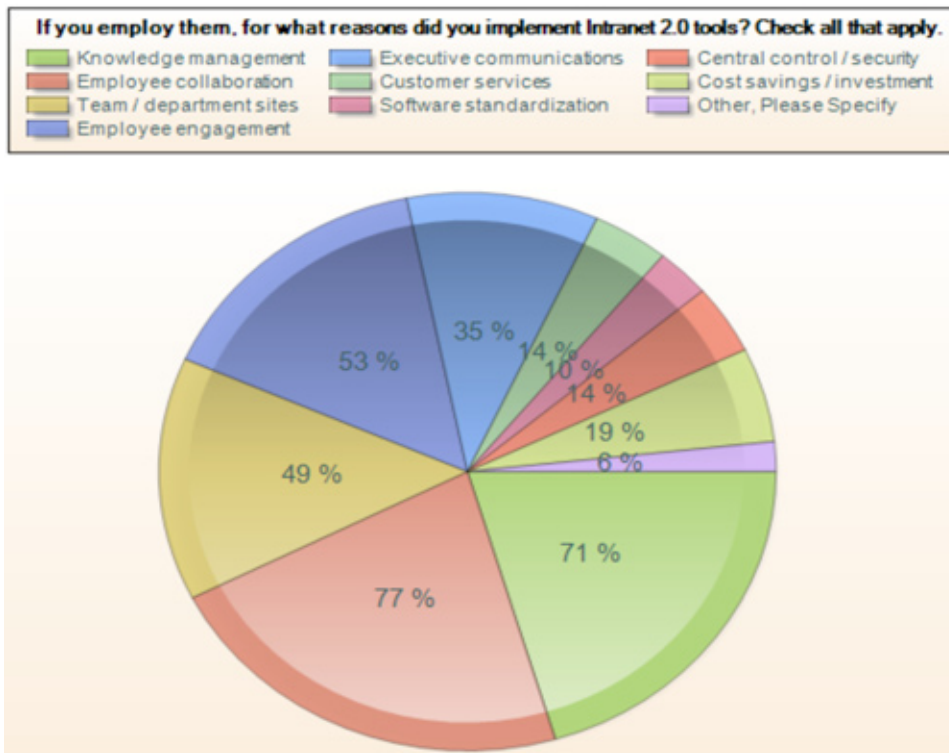
### Question 13: Purpose

If you employ them, for what reasons did you implement Intranet 2.0 tools? Check all that apply.

#### Findings:

The leading need or reason behind Intranet 2.0 implementations is employee collaboration:

- 77% of organizations cite “employee collaboration” as a key reason
- 71% of organizations cite “knowledge management” as a key reason
- 53% of organizations cite “employee engagement” as a key reason
- 35% of organizations cite “executive communications” as a key reason



#### Analysis:

Not surprisingly, most organizations have deployed 2.0 tools as a means of improving employee communications, engagement and collaboration. Knowledge management is also a priority, but closely related to the above employee priorities (if not one in the same). It's worth noting that cost control and cost savings are a low priority for most organizations (cited by only 14% and 19% respectively). And rather than being driven from the top down the executive role is often an afterthought with employees being the priority for most deployments.



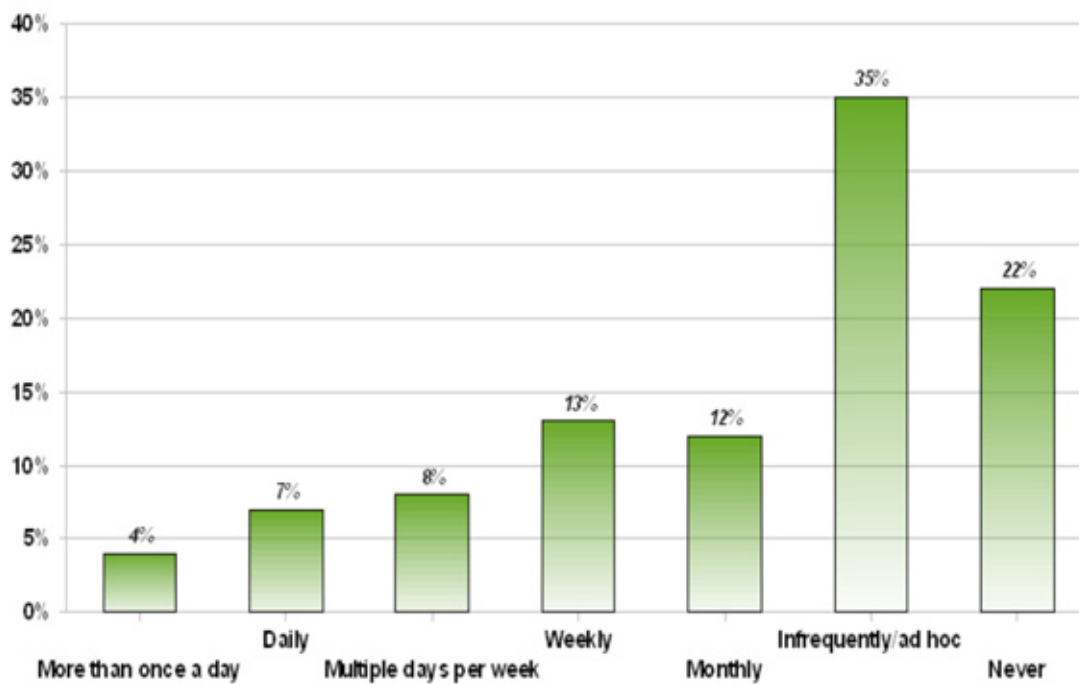
## Question 14: Executive Contribution

If you have the tools, how often do executives contribute content in their own words (or by their own hand) to a blog, podcast or other Intranet 2.0 tool?

### Findings:

While executives have started to participate, most executives have contributed very little, in most organizations that have adopted Intranet 2.0 tools:

- 57% of executives have never contributed content or have done so infrequently (less than once per month)
- Put another way, 88% of organizations that have Intranet 2.0 tools have had executives contribute content to the tools (at the very least, infrequently)
- Only 11% of organizations have executives that contribute content on a daily basis (or multiple times per day)
- 47% of organizations with Intranet 2.0 tools have executives that contribute content on a monthly basis or infrequently



### Analysis:

While more and more executives are approving Intranet 2.0 tools, they themselves are infrequent contributors at most organizations. A rare minority are contributing on a daily basis (11%). However, as these tools become more widely adopted and used, so too will executive participation and contributions increase (dramatically over the next two years).

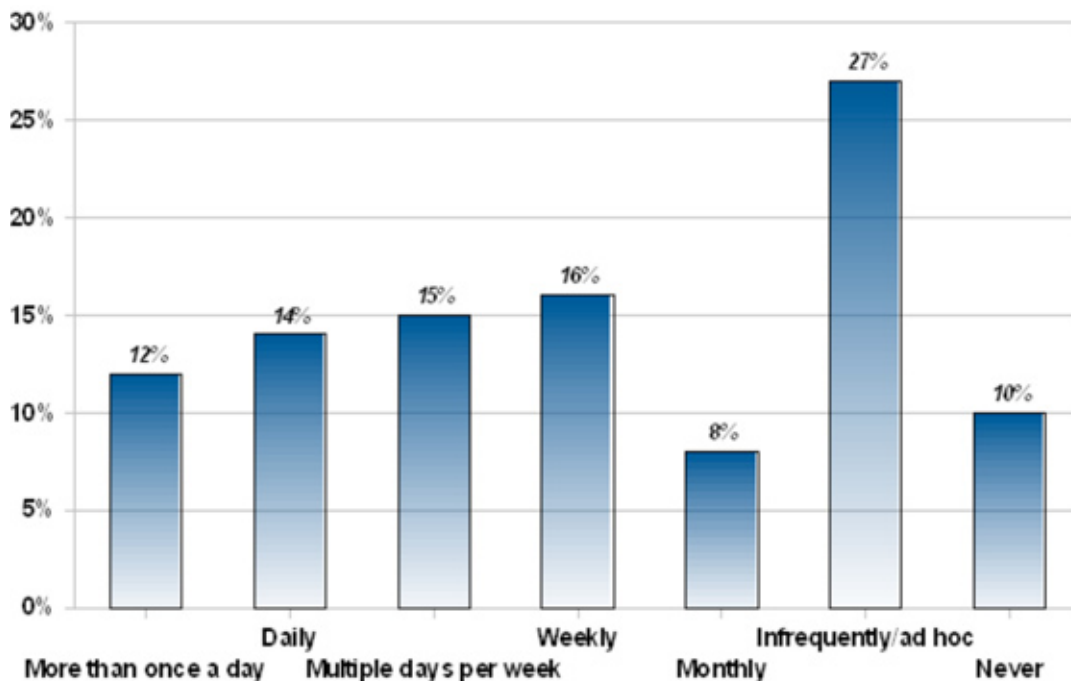
## Question 15: Employee Contribution

If you have the tools, how often do employees contribute content in their own words (or by their own hand) to a blog, podcast or other Intranet 2.0 tool?

### Findings:

Employees are far more engaged than their executive managers and contribute 2-3 times more frequently than executives:

- Only 37% of employees have never contributed content or have done so infrequently (less than once per month)
- Put another way, 90% of organizations that have Intranet 2.0 tools have had employees contribute content to the tools (at the very least, infrequently)
- 26% of organizations have employees that contribute content on a daily basis (or multiple times per day)
- 57% of organizations with Intranet 2.0 tools have employees that contribute content on a weekly basis or more frequently



### Analysis:

Not unlike the Web 2.0 trailblazers, most contributions to Intranet 2.0 tools are from the ground-up, by employees. Not quite half of employees (41%) at those organizations with Intranet 2.0 tools contribute content at least multiple times per week (if not daily or more than once per day). Employee contributions to Intranet 2.0 tools will continue to grow dramatically in the next year.

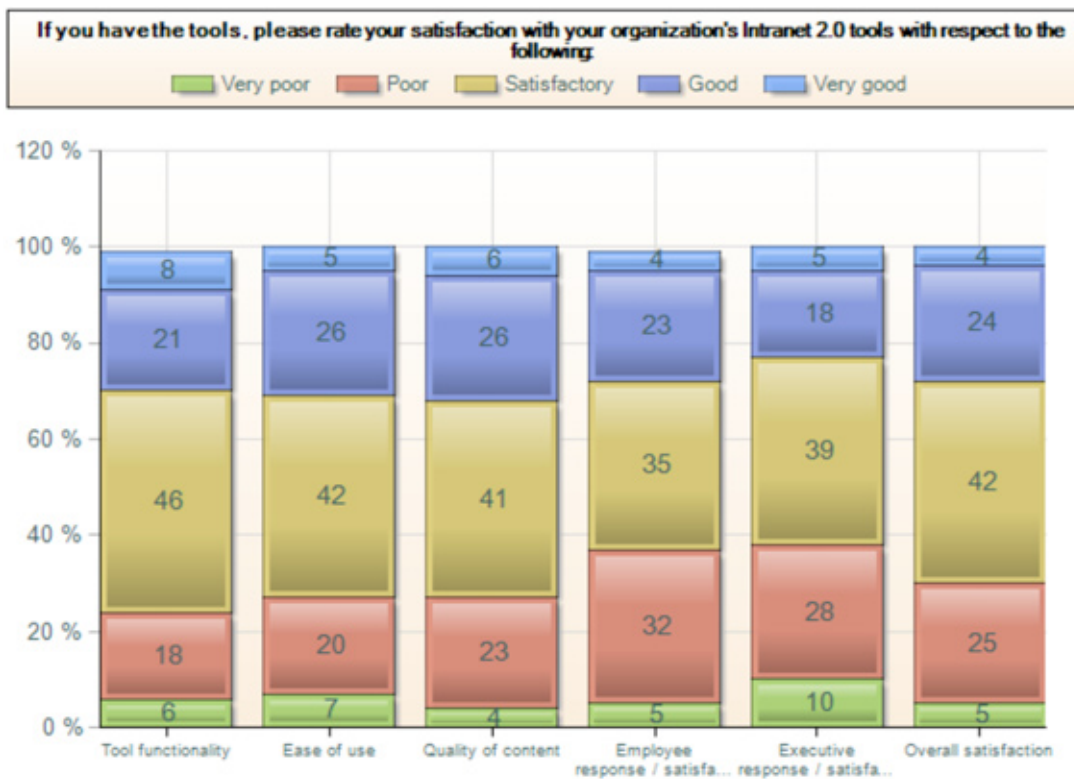
## Question 16: Satisfaction Levels

If you have the tools, please rate your satisfaction with your organization's Intranet 2.0 tools with respect to the following:

### Findings:

Satisfaction levels are thus far underwhelming, and clearly need improvement, particularly amongst executives:

- Only 29% of organizations rate the tool “functionality” as good or very good; 24% rate them as poor or very poor
- Only 31% of organizations rate the tool “ease of use” as good or very good; 27% rate them as poor or very poor
- Satisfaction rates with executives are dangerously low: only 23% of executives rate the 2.0 tools as good or very good; 38%% rate them as poor or very poor



### Analysis:

Clearly many organizations are still learning to use these tools, and the deployment and use are generally sub-optimal. More time is necessary for most organizations to properly deploy these tools (including change management), and for the technology to advance improvements in functionality and ease of use.

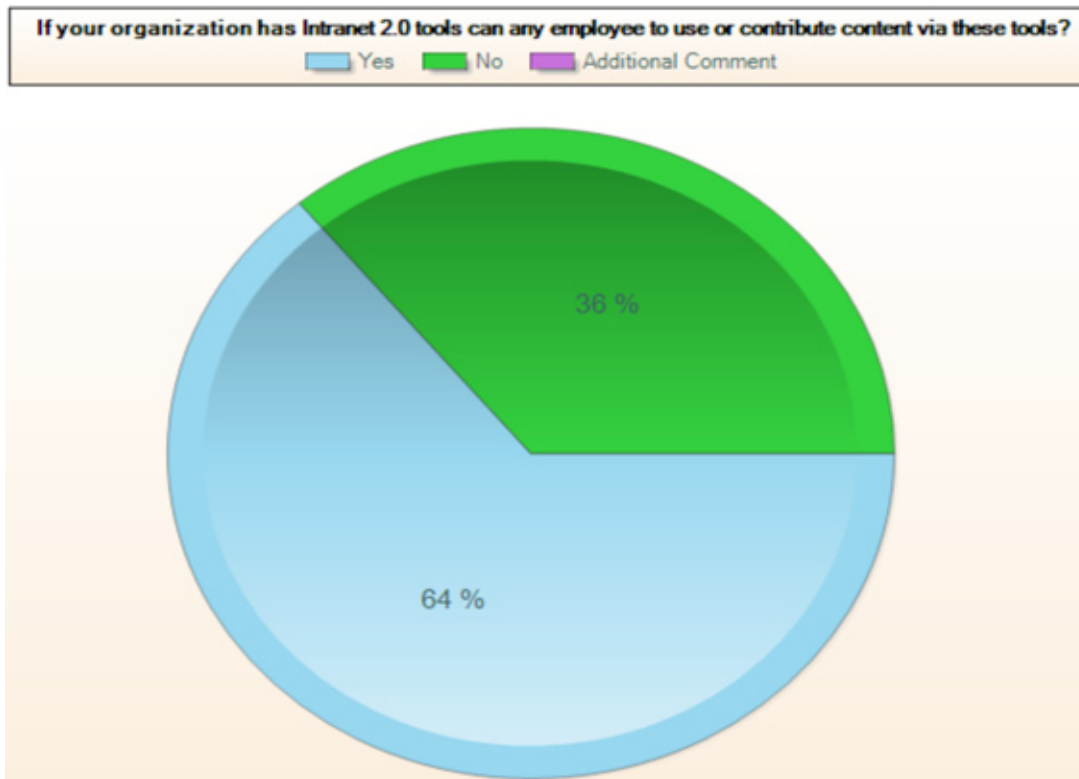
## Question 17: Employee Access

If your organization has Intranet 2.0 tools, can any employee use or contribute content via these tools?

### Findings:

Nearly two-thirds (64%) of organizations with Intranet 2.0 tools allow any employee to contribute content to Intranet 2.0 tools.

- Only 36% of organizations limit the contributions of employees to Intranet 2.0 tools (for many the issue is that of access not prohibition)



### Analysis:

Most organizations with Intranet 2.0 tools have opened the doors to all employees to contribute content. However, some organizations have employees that don't have access to the intranet, or some 2.0 tools are "locked-down" for certain roles. Examples: "Discussion forums are membership only depending on employee function." "No, we just have an executive blog." "Certain pages such as HR and Finance are locked down for editing." "Employees must first be given privileges to add content."

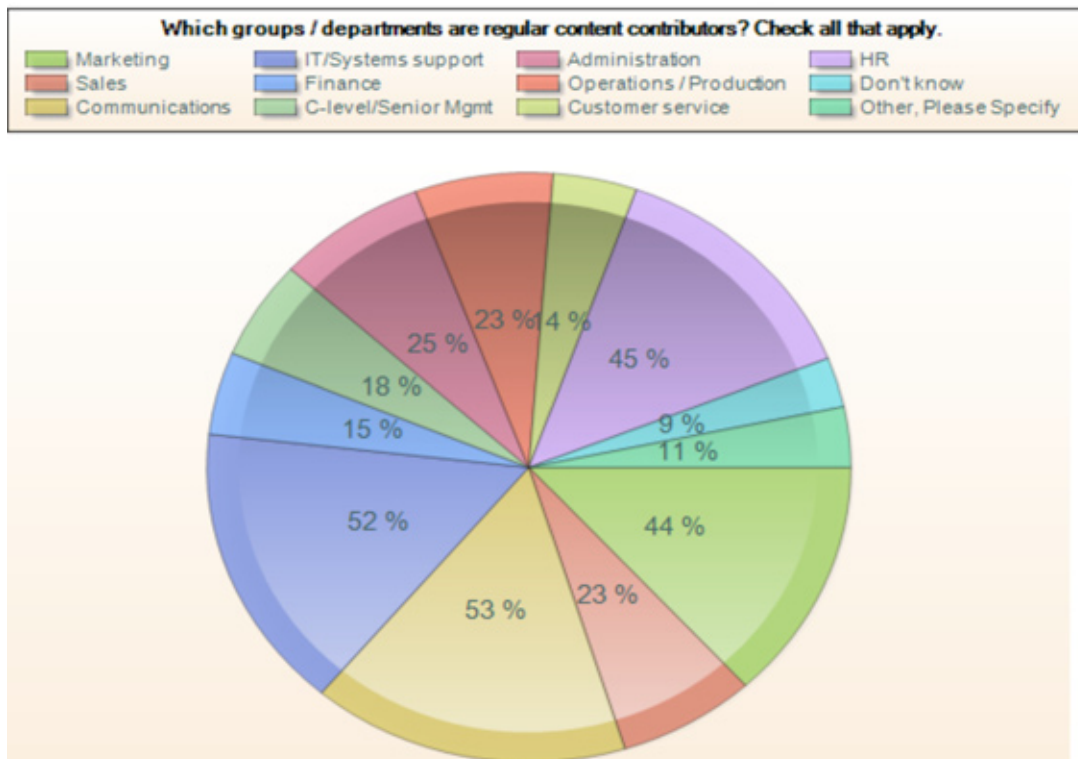
## Question 18: Department Use

Which groups / departments are regular content contributors? Check all that apply.

### Findings:

Not surprisingly, Communications staff are the biggest contributors to Intranet 2.0 tools, followed closely by IT, HR and Marketing staff:

- 53% of organizations with Intranet 2.0 tools have Communications staff as regular contributors
- 52% of organizations with Intranet 2.0 tools have IT/ Systems staff as regular contributors
- 45% of organizations with Intranet 2.0 tools have HR staff as regular contributors
- 44% of organizations with Intranet 2.0 tools have Marketing staff as regular contributors



### Analysis:

The natural born writers in Communications are the biggest, regular contributors to Intranet 2.0 tools (also due to the fact that they are, like IT, HR and Marketing, early adopters and may have purchased or overseen the deployment of these tools). Note that among these organizations, 18% have executives that regularly contribute (though “regularly” could, in some organizations, be defined as including only monthly contributions).

## Question 19: Governance & Standards

Does your organization have user content governance, standards or policies?

### Findings:

A mere majority of organizations have content governance and standards:

- 58% of organizations have user content governance, standards or policies



### Analysis:

It is surprising that more organizations, often obsessed with security and privacy, would not have rules and policies for writing and posting content to websites, blogs and wikis. However, this number would include those organizations that don't yet have Intranet 2.0 tools. Some organizations with Intranet 2.0 tools and no rules will no doubt quickly learn the need for governance and policies.

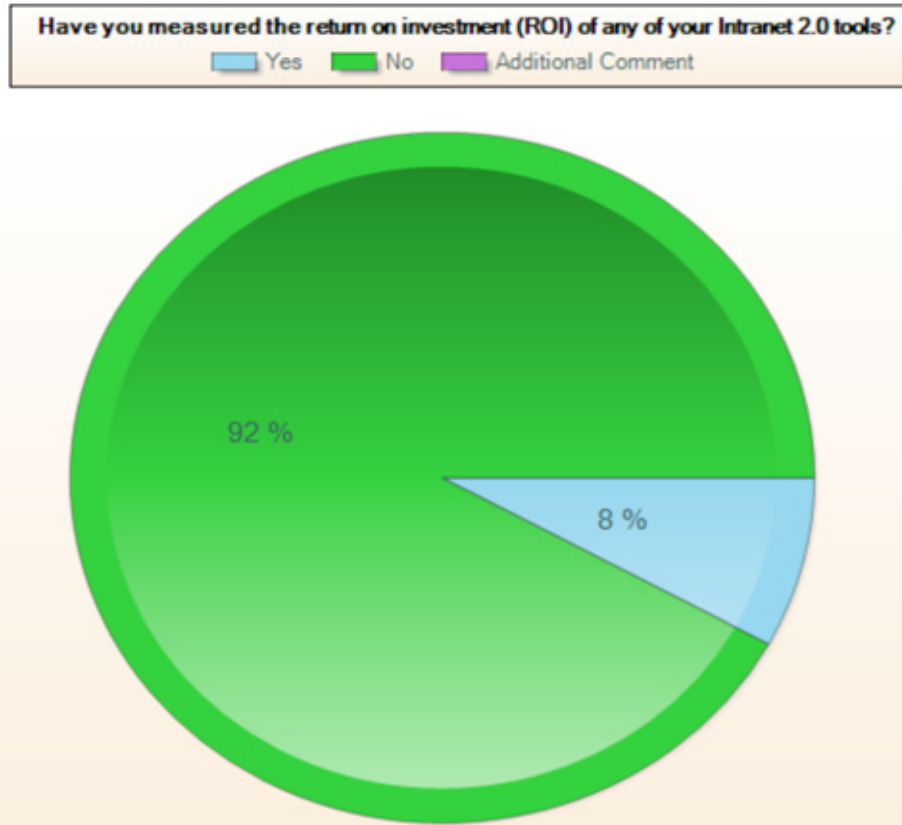
## Question 20: ROI

Have you measured the return on investment (ROI) of any of your Intranet 2.0 tools?

### Findings:

The vast majority of organizations don't measure the ROI of their Intranet 2.0 tools:

- 92% of organizations do not measure ROI for Intranet 2.0 tools



### Analysis:

This comes as no shock as the majority of organizations (less than 10% according to Prescient Digital Media's Intranet ROI Study) do not measure the ROI of an intranet, let alone Intranet 2.0 tools. This is a shame because numerous case study examples (see case studies for Placemaking, Sabre, and others on [www.IntranetBlog.com](http://www.IntranetBlog.com)) show that the ROI of these tools can in fact be measured. However, most organizations do not know how to measure ROI, or where to begin. Recommended reading includes ["Finding ROI": Measuring the Value of Intranet Investments.](#)

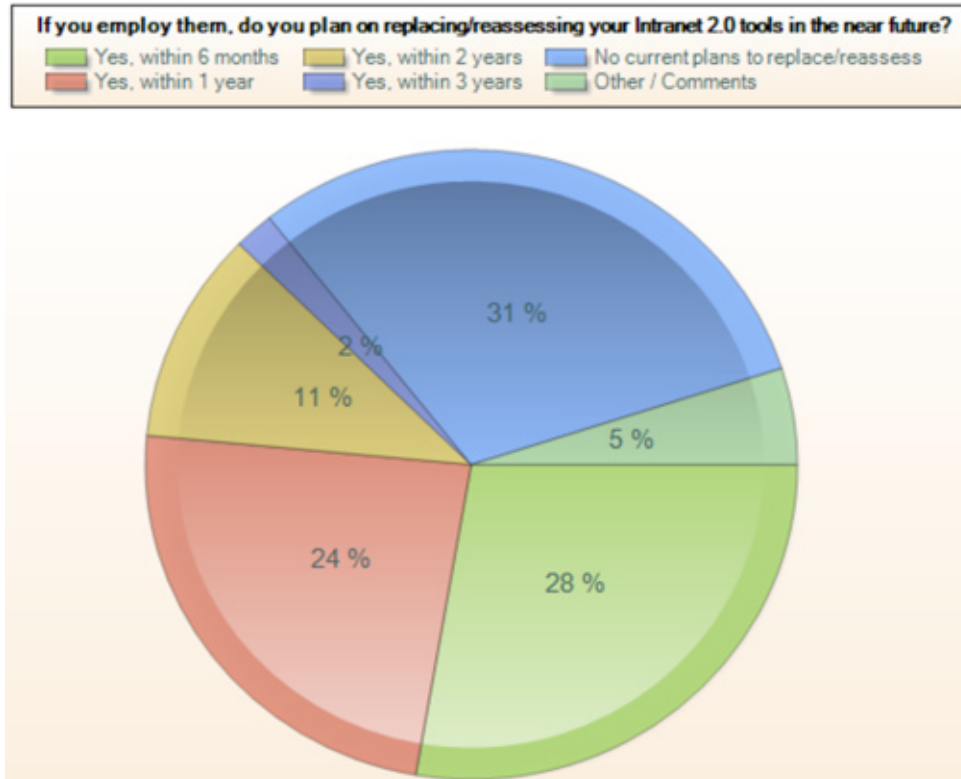
## Question 21: Upgrading Tools

If you employ them, do you plan on replacing/reassessing your Intranet 2.0 tools in the near future?

### Findings:

Low satisfaction levels with current Intranet 2.0 tools have a majority looking to replace or reassess their tools within one year:

- 52% of organizations with Intranet 2.0 tools plan to replace or reassess their tools within one year (28% within 6 months)
- 31% have no plans to replace/reassess their Intranet 2.0 tools



### Analysis:

The low satisfaction levels with Intranet 2.0 tool functionality, as well as ease of use and content contributions (at the executive and employee levels), has prompted many organizations to already look towards replacing their initial 2.0 tools. Many organizations that use the tools use the overly-simplistic tools bundled in SharePoint, their CMS, or open-source solutions that are not very robust, and look and respond like first generation software solutions.



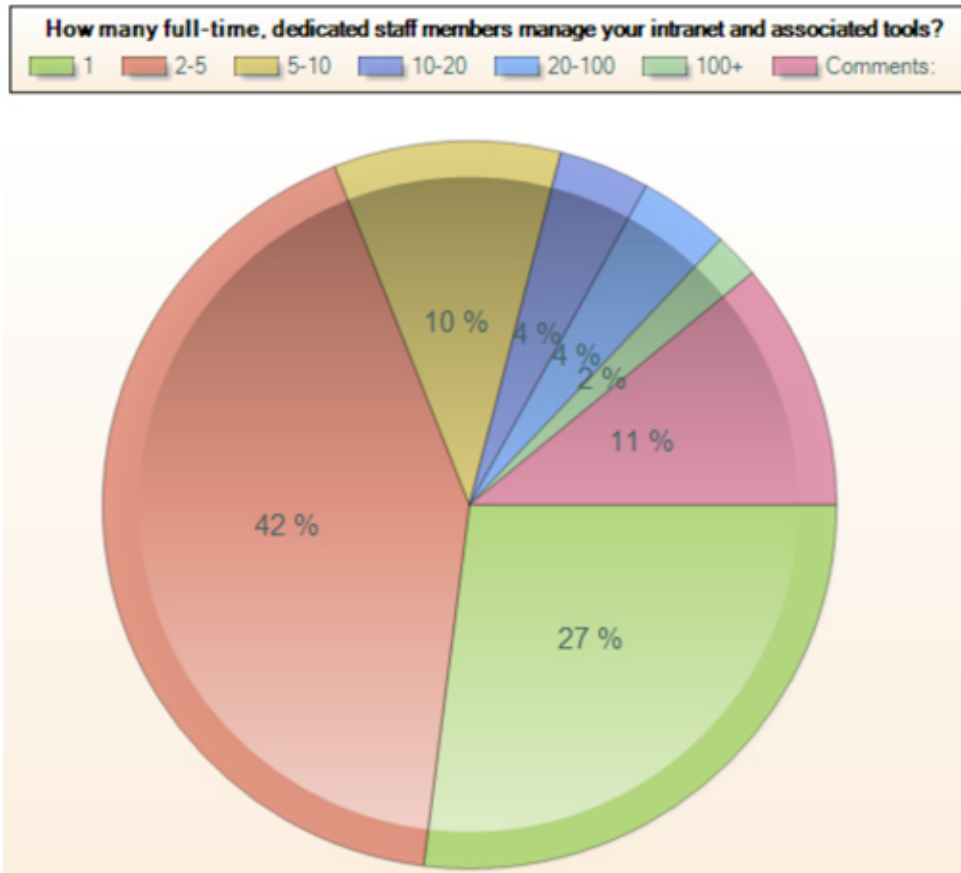
## Question 22: Dedicated Staff

How many full-time, dedicated staff members manage your intranet and associated tools?

### Findings:

The vast majority of organizations have only one or two dedicated staff to managing their intranet and associated tools (including Intranet 2.0 tools):

- 69% of organizations have 5 or fewer staff dedicated to managing the intranet (27% have only a single person)
- 6% have a dedicated compliment of 20 or more staff (2% have 100+ staff)



### Analysis:

Some organizations such as IBM or Cisco have expanded intranet teams that number in the hundreds of individuals; an exception to the rule where most live with one or two dedicated intranet managers. Intranet 2.0 tools usually are owned by the intranet manager / owner which is almost always in the Corporate Communications (sometimes under the HR umbrella) or IT / Systems groups.

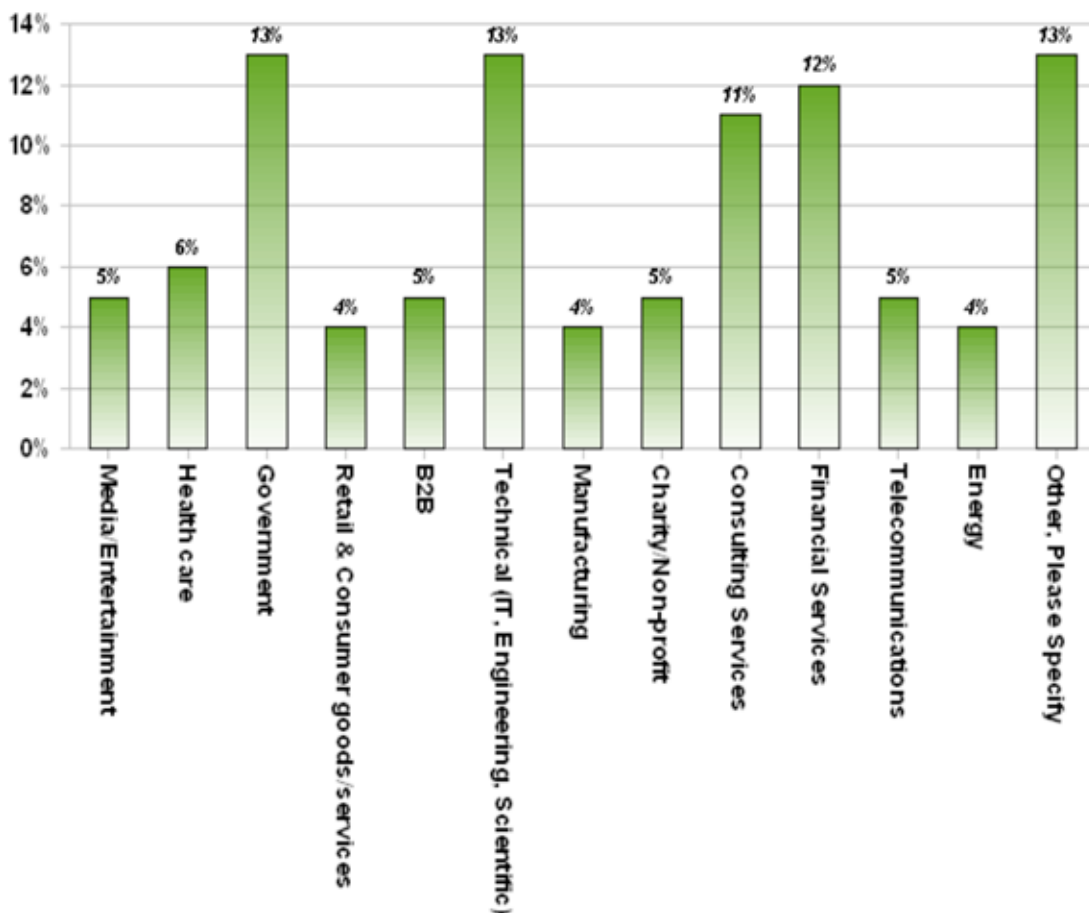
## Question 23: Industry

What industry/sector is your organization in?

### Findings:

The survey sample is a strong, cross-representative sample of industry in the Western World with no industry accounting for more than 13% of the sample size:

- 13% of the organizations are government
- 13% from technology
- 12% from financial services
- 6% from healthcare
- 5% from each media/entertainment, B2B, non-profit, & telecommunications
- 4% from energy as well as manufacturing and retail/consumer goods



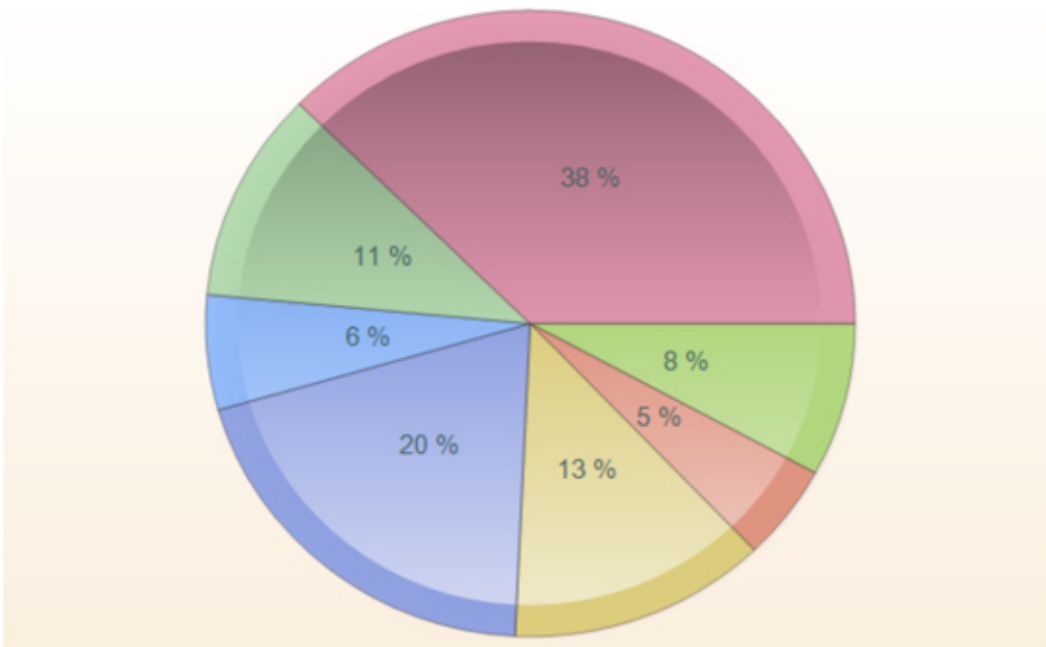
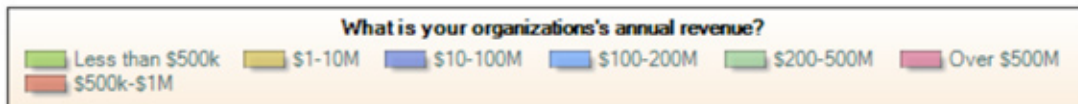
## Question 24: Corporate Revenue

What is your organization's annual revenue?

### Findings:

The survey sample is a strong, cross-representative sample of industry by revenue, although those companies with over \$500 million in revenue compose the biggest segment of the study:

- 38% of the organizations have annual revenue of US\$500 million or more
- 37% of the organizations have annual revenue of between US\$10 and US\$500 million
- 26% of the organizations have revenue of \$10 million or less



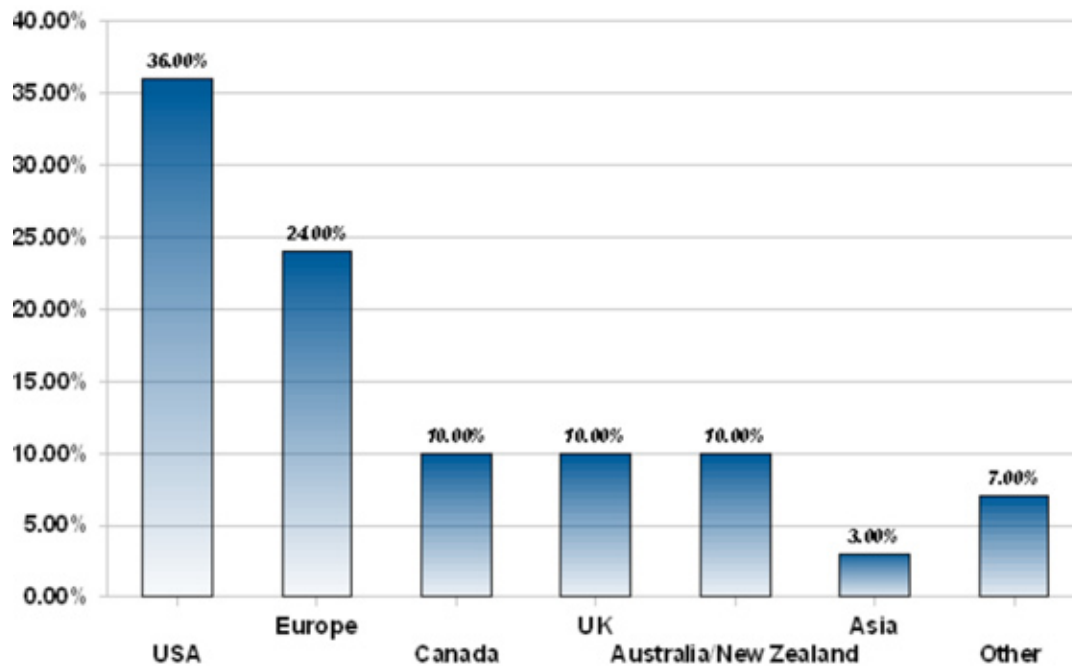
## Question 25: Geographic Location

What is the geographic location of your organization's head office?

### Findings:

60% of the respondents are from the United States and Europe:

- 36% of respondents/organizations are from the U.S
- 24% from Europe
- 11% from Canada
- 11% from Australia / New Zealand
- 10% from UK
- 10% from Asia, Africa, South & Central America

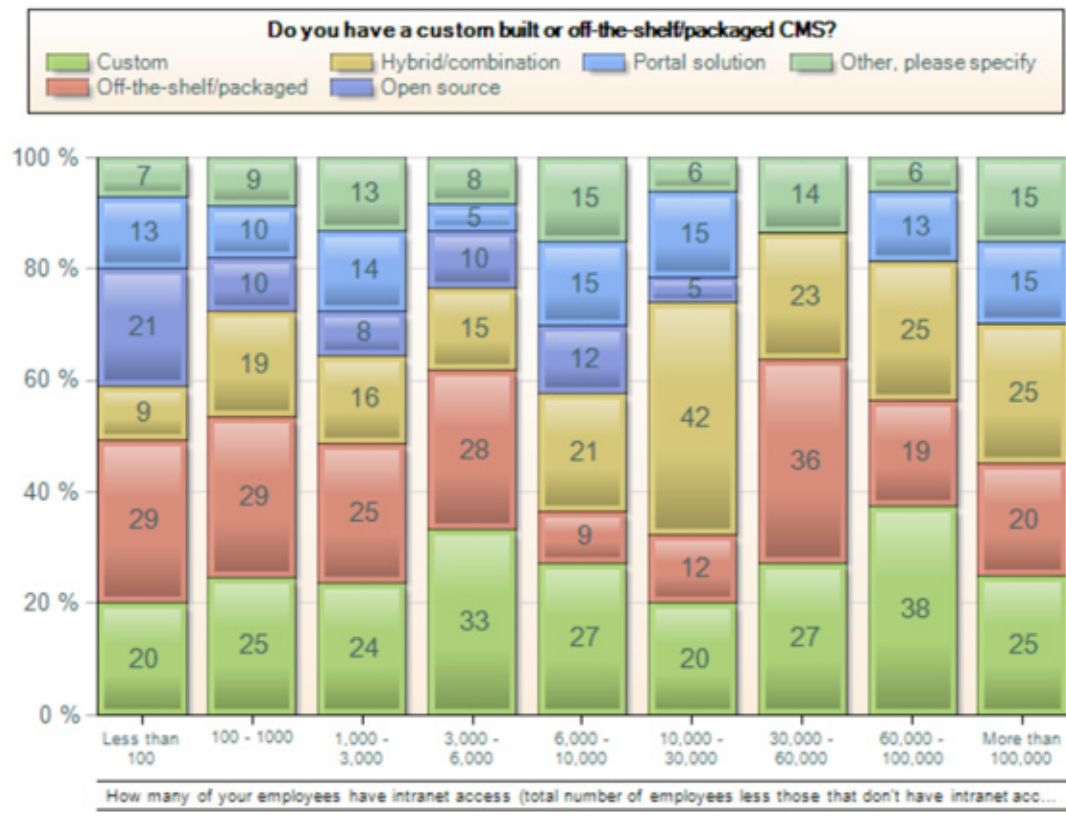


## Cross-Tabulation Results by Geography & Size

Cross-tabulation results reveal the distribution of two or more variables (e.g. results by organization size or industry). Cross-tab results are presented for a number of variables, but for the sake of brevity, only for a few variables. More in-depth cross-tab results by industry, employee population and other variables are available by request (contact Prescient Digital Media at 416.926.8800 or via the website at [www.PrescientDigital.com](http://www.PrescientDigital.com)).

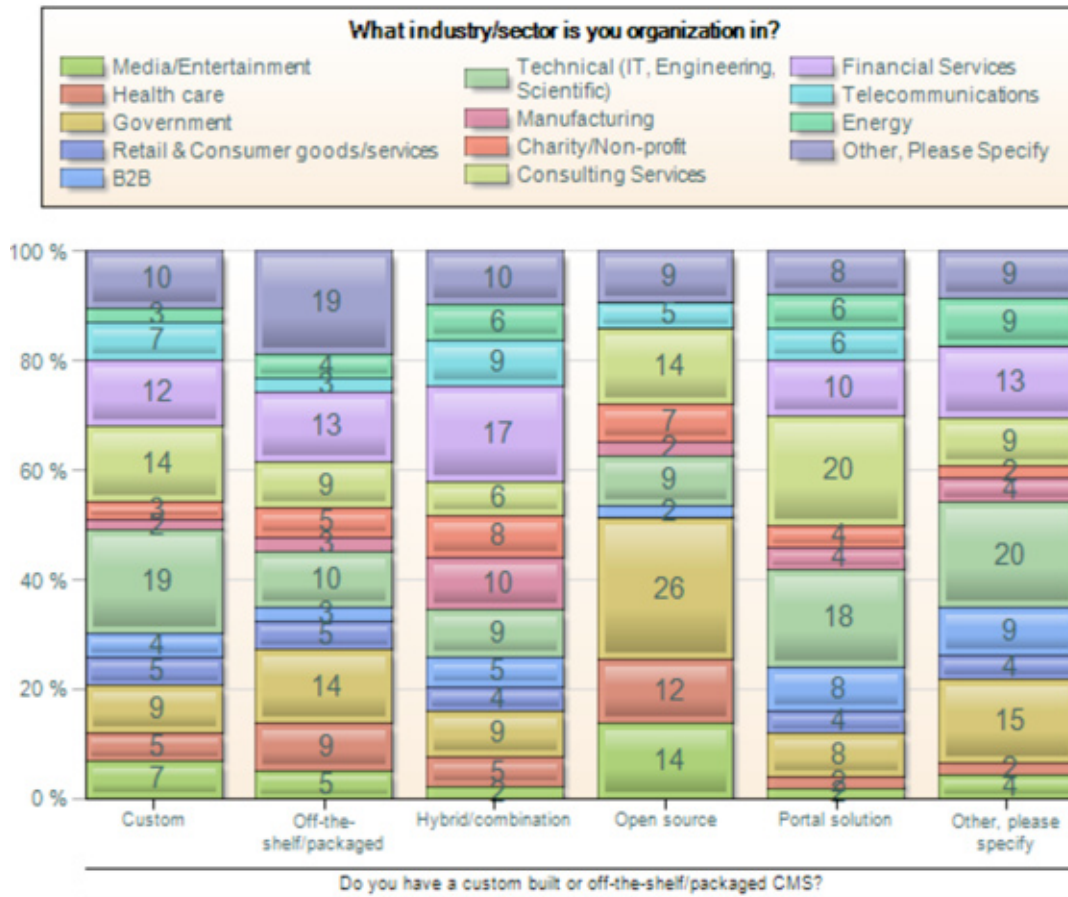
### Technology Platform

#### Technology Platform by Company Size (Employees with Access)



**Findings:** The results are fairly consistent across all organizations, particularly with the use of CMS solutions (custom-built or off-the-shelf CMSs are existent in roughly 50% of all organizations, except in organizations of 6,000 – 30,000 employees with intranet access where portal and hybrid solutions are more prominent). It should be noted that open-source solutions are far more popular in small organizations (under 1000 employees with access) and non-existent in large organizations (over 30,000 employees).

## Technology Platform by Industry



**Findings:** Results are again fairly consistent across different industries with some notable exceptions:

- Governments are the biggest open source users by far with 26% using an open source solution (compared to the average of about 10% for most of the others)
- Custom-built solutions are more common in technology organizations with 19% relying on a custom solution (compared to the average of about 10% for most of the others)
- Off-the-shelf CMS solutions are more common in “other” industries (e.g. transportation and legal)
- Portal solutions are more common in consulting agencies (20%) and technology organizations (18%) (compared to the average of about 8% of other organizations)

## Intranet 2.0 Tools

### Blogs by Company Size (Employees with Access)

	Total*	How many of your employees have intranet access (total number of employees less those that don't have intranet access)?								
		Less than 100	100 - 1000	1,000 - 3,000	3,000 - 6,000	6,000 - 10,000	10,000 - 30,000	30,000 - 60,000	60,000 - 100,000	More than 100,000
		543	88	124	92	66	41	68	27	19
1 No plans & no interest	57 10.5%	20 22.7%	13 10.5%	8 8.7%	3 4.5%	7 17.1%	2 2.9%	1 3.7%	3 15.8%	1 5.0%
2 None, but considering options	143 26.3%	17 19.3%	40 32.3%	30 32.6%	22 33.3%	9 22.0%	14 20.6%	5 18.5%	5 26.3%	1 5.0%
3 Not yet, but have plans	103 19.0%	8 9.1%	31 25.0%	23 25.0%	17 25.8%	9 22.0%	10 14.7%	4 14.8%	1 5.3%	1 5.0%
4 Some, limited use	171 31.5%	21 23.9%	29 23.4%	25 27.2%	23 34.8%	12 29.3%	32 47.1%	12 44.4%	5 26.3%	12 60.0%
5 Enterprise use	69 12.7%	22 25.0%	11 8.9%	6 6.5%	1 1.5%	4 9.8%	10 14.7%	5 18.5%	5 26.3%	5 25.0%

**Findings:** Generally speaking, the bigger the organization the greater the prevalence of intranet blogs:

- A whopping 85% of organizations with more than 100,000 employees with intranet access have blogs on the intranet (compared to only 49% of organizations with less than 100 employees with access, or 32% for those with 100-1000 employees with access)

### Wikis by Company Size (Employees with Access)

	Total*	How many of your employees have intranet access (total number of employees less those that don't have intranet access)?								
		Less than 100	100 - 1000	1,000 - 3,000	3,000 - 6,000	6,000 - 10,000	10,000 - 30,000	30,000 - 60,000	60,000 - 100,000	More than 100,000
		541	87	124	91	67	42	67	27	18
1 No plans & no interest	55 10.2%	12 13.8%	13 10.5%	10 11.0%	9 13.4%	4 9.5%	4 6.0%	2 7.4%	0 0.0%	1 5.0%
2 None, but considering options	150 27.7%	15 17.2%	42 33.9%	28 30.8%	25 37.3%	13 31.0%	17 25.4%	4 14.8%	3 16.7%	3 15.0%
3 Not yet, but have plans	86 15.9%	12 13.8%	16 12.9%	19 20.9%	15 22.4%	9 21.4%	9 13.4%	3 11.1%	2 11.1%	1 5.0%
4 Some, limited use	160 29.6%	23 26.4%	32 25.8%	25 27.5%	15 22.4%	11 26.2%	25 37.3%	15 55.6%	7 38.9%	9 45.0%
5 Enterprise use	90 16.6%	25 28.7%	21 16.9%	9 9.9%	3 4.5%	5 11.9%	12 17.9%	3 11.1%	6 33.3%	6 30.0%

**Findings:** The bigger the organization, the greater the prevalence of intranet wikis, with two exceptions:

- The medium size organizations of 3,000 – 6,000 employees with access, and 6,000 – 10,000 employees with access have the lowest prevalence of wikis (27% and 38% respectively)
- Smaller organizations of less than 100 employees are almost as likely to have enterprise-wide deployment of wikis (29%) as the very large companies of 60,000 – 100,000 employees (33%) and those with more than 100,000 employees (30%)

## Blogs by Industry

	Total*	What industry/sector is your organization in?												
		Media/Entertainment	Health care	Government	Retail & Consumer goods/services	B2B	Technical (IT, Engineering, Scientific)	Manufacturing	Charity/Non-profit	Consulting Services	Financial Services	Telecommunications	Energy	Other, Please Specify
	529	28	30	67	22	26	69	22	24	58	67	25	22	69
1 No plans & no interest	57 10.8%	2 7.1%	3 10.0%	9 13.4%	2 9.1%	2 7.7%	10 14.5%	1 4.5%	1 4.2%	7 12.1%	8 11.9%	1 4.0%	6 27.3%	5 7.2%
2 None, but considering options	139 26.3%	6 21.4%	10 33.3%	21 31.3%	7 31.8%	9 34.6%	17 24.6%	8 36.4%	6 25.0%	7 12.1%	20 29.9%	4 16.0%	5 22.7%	19 27.5%
3 Not yet, but have plans	100 18.9%	4 14.3%	10 33.3%	12 17.9%	4 18.2%	4 15.4%	14 20.3%	3 13.6%	2 8.3%	7 12.1%	10 14.9%	5 20.0%	4 18.2%	21 30.4%
4 Some, limited use	168 31.8%	12 42.9%	6 20.0%	19 28.4%	7 31.8%	8 30.8%	21 30.4%	8 36.4%	13 54.2%	19 32.8%	27 40.3%	8 32.0%	5 22.7%	15 21.7%
5 Enterprise use	65 12.3%	4 14.3%	1 3.3%	6 9.0%	2 9.1%	3 11.5%	7 10.1%	2 9.1%	2 8.3%	18 31.0%	2 3.0%	7 28.0%	2 9.1%	9 13.0%

**Findings:** The penetration rate of intranet blogs in not-for-profits and consulting services are above 60% (62% and 64% respectively). The industries with the lowest use of blogs include:

- Healthcare (23% adoption rate)
- Energy (32% adoption rate)
- Other (34% adoption rate)
- Government (37% adoption rate)

## Wikis by Industry

	Total*	What industry/sector is your organization in?												
		Media/Entertainment	Health care	Government	Retail & Consumer goods/services	B2B	Technical (IT, Engineering, Scientific)	Manufacturing	Charity/Non-profit	Consulting Services	Financial Services	Telecommunications	Energy	Other, Please Specify
	527	27	31	67	22	26	69	22	25	58	67	24	22	67
1 No plans & no interest	54 10.2%	4 14.8%	3 9.7%	9 13.4%	3 13.6%	1 3.8%	6 8.7%	1 4.5%	1 4.0%	5 8.6%	6 9.0%	2 8.3%	7 31.8%	6 9.0%
2 None, but considering options	147 27.9%	8 29.6%	9 29.0%	20 29.9%	9 40.9%	4 15.4%	11 15.9%	6 27.3%	9 36.0%	9 15.5%	28 41.8%	4 16.7%	3 13.6%	27 40.3%
3 Not yet, but have plans	83 15.7%	2 7.4%	10 32.3%	14 20.9%	5 22.7%	5 19.2%	7 10.1%	6 27.3%	2 8.0%	9 15.5%	6 9.0%	4 16.7%	4 18.2%	9 13.4%
4 Some, limited use	157 29.8%	8 29.6%	8 25.8%	18 26.9%	3 13.6%	9 34.6%	27 39.1%	6 27.3%	12 48.0%	17 29.3%	23 34.3%	5 20.8%	7 31.8%	14 20.9%
5 Enterprise use	86 16.3%	5 18.5%	1 3.2%	6 9.0%	2 9.1%	7 26.9%	18 26.1%	3 13.6%	1 4.0%	18 31.0%	4 6.0%	9 37.5%	1 4.5%	11 16.4%

**Findings:** The penetration rate of intranet wikis in B2B, IT, and consulting services are above 60% (62%, 65% and 60% respectively). The industries with the lowest use of wikis include:

- Retail & Consumer goods (22% adoption rate)
- Healthcare (29% adoption rate)
- Government (36% adoption rate)



# Recommendations

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Successful deployment and use of Intranet 2.0 tools begins with proper planning, engaged and supportive executives, and participatory employees:

- **Leadership** – Senior management must set the tone; your executives must be leading the dialogue and controlling the message
- **Plan** - Planning is an essential requisite for success; develop a plan that is based on a thorough assessment and contains key performance indicators (KPIs)
- **Benchmark** - Understand the ingredients of a good blog, wiki or podcast; watch and cherry-pick from the leaders
- **Engage** – gather input and feedback from employees early in the planning process; act quickly on necessary changes
- **Governance** – every tool needs an owner and a policy (terms of use)
- **Technology** – don't be sold a solution, evaluate and select a 2.0 solution based on business requirements & needs (evaluate several solutions via an RFP process)
- **Refresh** – keep your content and tools relevant and fresh, and ensure they cross-promote your latest products, services and key communications & HR messages
- **Monitor** - Ensure you're aware of which external 2.0 websites are popular, how they work, and what users like/dislike about the features
- **Measure** - Document the link between social media and the business and develop a set of performance metrics with baselines that are regularly measured

Finally, consider an Intranet 2.0 undertaking as “evolution not revolution” – there's no need to solve the world on your first attempt; test and pilot solutions and enhance as necessary before trying to conquer the world.

## 10 social media sites that are 'must know':

- Facebook
- YouTube
- Twitter
- Wikipedia
- Flickr
- Deli.co.us
- WordPress
- Google Gadgets
- Digg
- Blogger.com

## About Prescient Digital Media

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Prescient Digital Media is a group of senior intranet and Internet consultants that provide strategic Internet and intranet consulting, planning and communications services to organizations of all sizes.

Prescient plans and builds highly effective websites and intranets that...

- are demonstrably better than the competition;
- make CEOs and users happy; and
- deliver measurable value by increasing sales and employee productivity.

Prescient's focus includes the assessment, planning, technology selection, content and launch of intranets, websites, and web-based tools for:

- Health and life sciences
- Financial services
- Energy
- Government
- Technology

Prescient services for intranet, Internet and e-Health include:

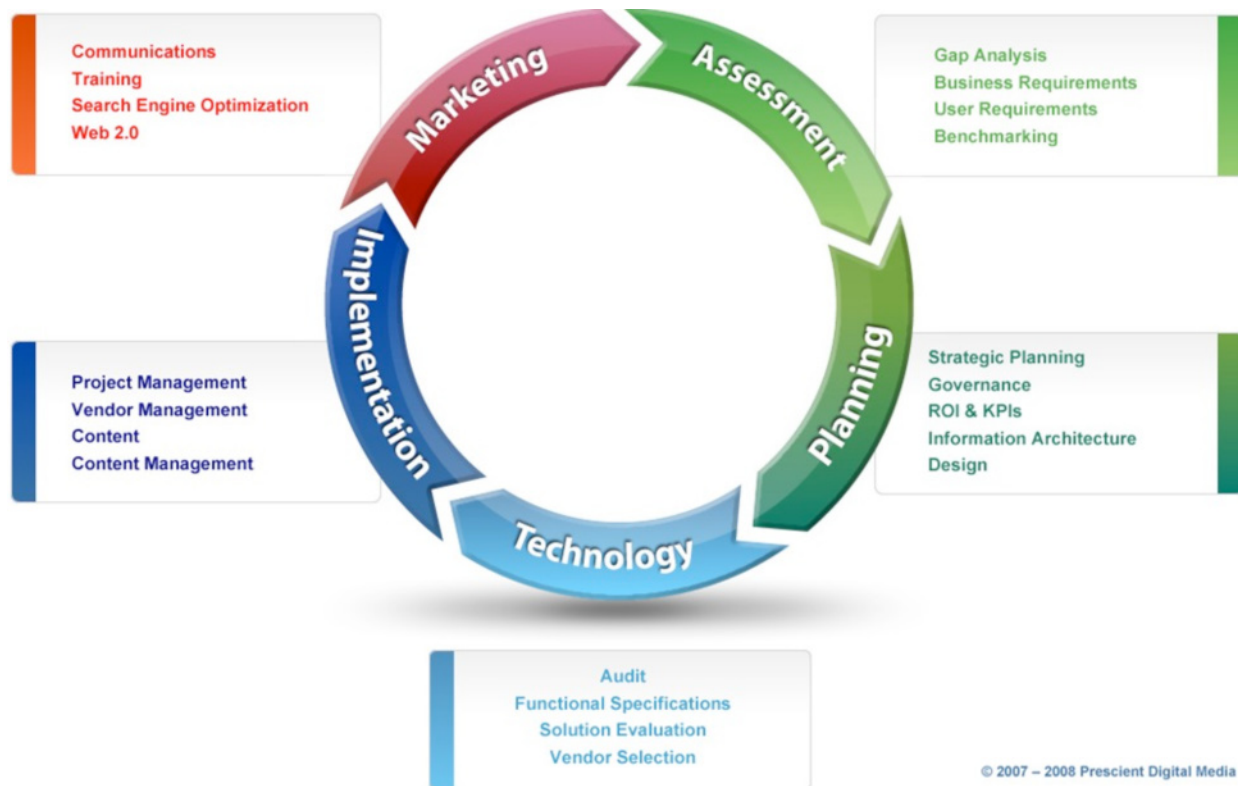
- Analysis (evaluation, business requirements, user research, benchmarking)
- Planning (strategic planning, functional specifications, information architecture)
- Technology (platform and application evaluation, selection, and implementation)
- Implementation (design, integration, content, tools)
- Marketing (communications, content management, operation, marketing, SEO)

### Some of our clients include:



# Intranet Project Methodology

The Intranet Project Methodology © 2001 - 2009 is the all encompassing intranet project methodology for guiding the process of building or redesigning an intranet or enterprise portal. This methodology was initially developed by Toby Ward in 2001, and has been refined two times since the initial iteration (based on market changes in organizational culture, technology, and common project methodologies).



Using our unique intranet methodology, Prescient intranet consultants construct a complete intranet plan that encompasses all the details and functions of an intranet, including information architecture, governance, design and technology.

Prescient encourages all organizations, whether a client or not, to adopt the methodology for their own and to use in steering the development of their intranet, portal, extranet or website.

## Additional Reading

Intranet articles & case studies – [www.IntanetBlog.com](http://www.IntanetBlog.com)

Follow us on Twitter – [www.Twitter.com/Intanet2](http://www.Twitter.com/Intanet2)

Join the Intranet Global Forum on Facebook – [www.Facebook.com/group.php?gid=2723005032](http://www.Facebook.com/group.php?gid=2723005032)

View our presentations on intranets on our SlideShare channel – [www.slideshare.net/prescient](http://www.slideshare.net/prescient)

Watch Toby discussing the future of intranets – [www.YouTube.com/watch?v=kaTMOTpRVQk](http://www.YouTube.com/watch?v=kaTMOTpRVQk)

Watch the slidecast presentation on the preliminary study findings – [www.YouTube.com/watch?v=SgFwltExWG4](http://www.YouTube.com/watch?v=SgFwltExWG4)

### Intranet 2.0 BluePrint:

Based on our early adopter knowledge of Intranet 2.0, a technology-neutral approach to defining business requirements and a proven methodology for aligning online collaboration needs with organizational goals, Prescient uses a customizable Intranet 2.0 Blueprint for our clients.

While the specific scope of the project will vary based on the client's unique requirements and budget, common deliverables in Prescient's Intranet 2.0 Blueprint include:

- Business requirements analysis – we will interview, gather and analyze feedback from key leaders, communications stakeholders, and end-user employees to understand the current needs and opportunities for improvement as well as exactly how Intranet 2.0 tools can be used to improve your business.
- Intranet 2.0 plan – Prescient will develop a detailed plan that documents the organization's need, the intended benefits, the specific strategic directives, suggested technology, and the types of tools (blogs, wikis, RSS, etc.) and functionality required.
- Blogs and wiki policies – we will define the roles and responsibilities of managers and end-users, the dos and don'ts, and recommendations and tips for both Intranet 2.0 users and managers.
- Intranet 2.0 implementation – Prescient will work with your internal IT department to implement two to three social media tools (e.g. 1 blog and 2 wikis with several options, features and content focuses) depending on the requirements analysis and subsequent plan, & the RSS technology used to drive posted content to end users.

For more information or to contact the author:

For more information on the Intranet 2.0 Global Survey or for help identifying, planning and implementing Intranet 2.0 tools, please contact Prescient Digital Media directly via the website ([www.PrescientDigital.com](http://www.PrescientDigital.com)) or phone us at 416.926.8800.