State of the Social Intranet

Results of 2012 Social Intranet Survey

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Note: This is the summarized version of the 2013 Social Intranet Study. It contains high-level data only. The complete 44 page report, which contains the results of all 26 questions, analysis and cross-tab statistics, can be purchased here.

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Introduction

The *Social Intranet Study* examines social media use on corporate intranets and the magnitude, use, and popularity of social media by employees and executives. The study findings and analysis are based on survey results collected in Fall 2012 by Toby Ward, Prescient Digital Media. These results reveal rapid adoption of social media on the corporate intranet in the past year.

The Social Intranet Survey was completed by 651 participants in small, medium, and large organizations in a variety of industries across the world.

Geographical representation

The majority of organizations' head offices are located in North America and Europe:

- ➢ 32% of organizations are based in the United States.
- ➢ 24% of organizations are based in Europe.
- ➢ 15% of organizations are based in Canada.

Intranet size (employees with access)

The Social Intranet Survey sample consists of organization sizes from less than 100 intranet users to more than 50,000:

- ➢ 34% of organizations have one to 999 employees with intranet access.
- ➢ 40% of organizations have 1,000 to 9,999 employees with intranet access.
- ➢ 27% of organizations have 10,000 to 50,000+ employees with intranet access

Intranet size (organization revenue)

The survey was completed by a strong, cross-representative sample of small, medium and large organizations with revenues ranging from less than US$1 million to more than US $1 billion:

- ➢ 12% of organizations have revenues of less than US$1 million.
- ➢ 59% of organizations have revenues between US$1 million and US$1 billion.
- ➢ 30% of organizations have revenues of more than US$1 billion.

Intranet maturity

Most organizations have had an intranet for many years. In fact, 81% of organizations have had an intranet for five or more years:

- ➢ 5% of organizations have had an intranet for less than 1 year.
- ➢ 49% of organizations have had an intranet for more than 10 years.

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Organizations by industry

The following are the 10 most represented industries included in the study:

- Consulting
- Financial Services
- Health Care/Medicine
- Insurance
- Education
- Telecommunication equipment and services
- Banking
- Utility (water/power/energy)
- Computer equipment and services
- Media

In this report, the phrase "social media" and "intranet 2.0" are synonymous labels for describing enterprise or intranet social media tools such as blogs, wikis, and social networking.

For more information on the *Social Intranet Study*, or for help identifying, planning and implementing Intranet 2.0 tools, please contact Prescient Digital Media directly via the website www.PrescientDigital.com or by phone at +1 416.926.8800.

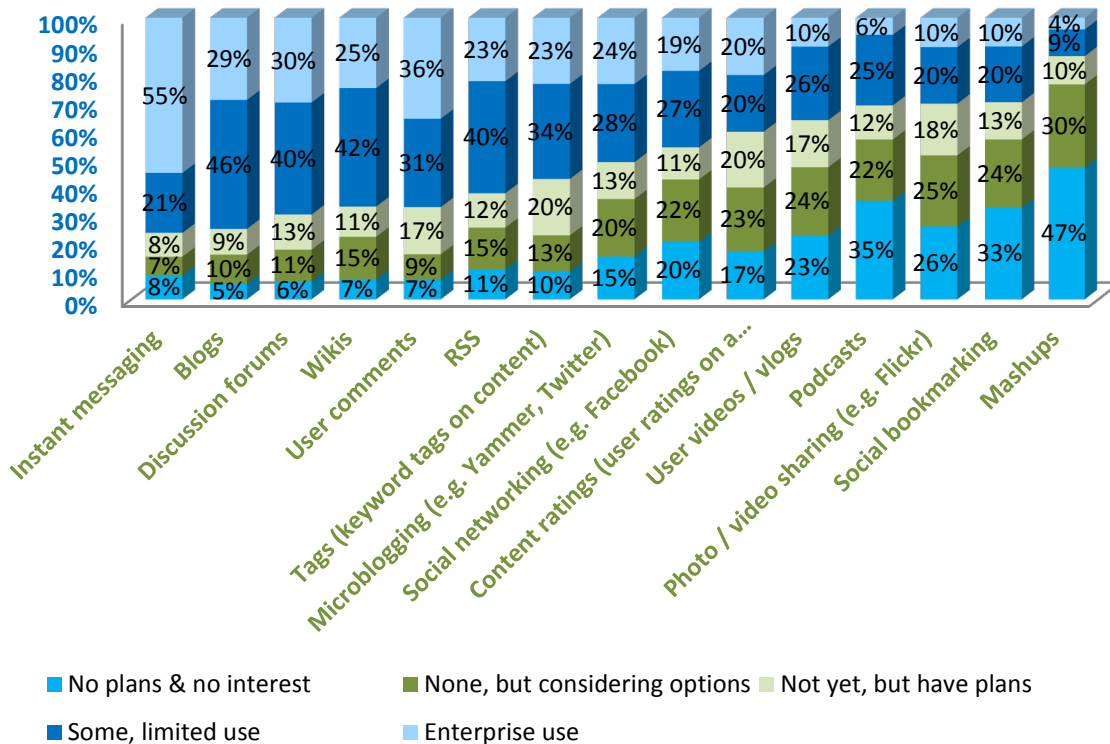*Note: percentages may not total 100 due to rounding.*

Executive Summary

Social media tools such as blogs, wikis and other vehicles, are present on most corporate intranets: 71% have at least one social media tool available to some or all employees. The most popular social media tools are instant messaging, blogs, discussion forums, wikis, and user commenting.

Most common intranet 2.0 tools

The five most popular social media tools are instant messaging, blogs, discussion forums, wikis, and user commenting:

- ➢ 76% of organizations have instant messaging.
- ➢ 75% of organizations have blogs.
- ➢ 70% of organizations have discussion forums.
- ➢ 67% of organizations have wikis.
- ➢ 67% of organizations have user commenting.

The following chart shows the most popular Intranet 2.0 tools in order from most popular (left) to least popular (right).

Legend:
- ■ No plans & no interest
- ■ None, but considering options
- ■ Not yet, but have plans
- ■ Some, limited use
- ■ Enterprise use

Technology platforms

Portal solutions (e.g. SharePoint or WebSphere) are the most popular technology platforms. Almost one half of intranets are powered by a portal solution:

- ➤ 44% of organizations use a portal solution.
- ➤ 24% use a content management system (e.g. Interwoven or Ektron).
- ➤ 15% use a custom-built solution.
- ➤ 13% use a hybrid solution.
- ➤ 4% use a social media platform.

SharePoint and other Intranet 2.0 solutions

Microsoft continues to dominate the enterprise collaboration or intranet 2.0 market. For those organizations that have deployed at least one Intranet 2.0 tool, about half (46%) have SharePoint (in some shape or form). No other vendor is used in more than 15% of organizations (though some organizations use multiple solutions).

- ➤ 46% of organizations with Intranet 2.0 tools are using Microsoft SharePoint (MOSS).
- ➤ WordPress and Facebook (employee groups) are becoming popular Intranet 2.0 products and are currently used in 13% and 10% of organizations, respectively.

Cost of social media

Most organizations spend little or nothing on their enterprise social media tools. Many organizations that implement social media tools spend less than US$10,000:

- ➤ 47% have spent less than US$10,000.
- ➤ 30% have spent between US$10,000 and US$99,999.
- ➤ 23% have spent US$100,000 or more.

Satisfaction

Executives and employees alike are less than thrilled with their enterprise social media. A very small percentage of organizations rate their Intranet 2.0 tools as good or very good:

- ➤ 29% of organizations rate their Intranet 2.0 tools' ease of use as good or very good.
- ➤ 28% of organizations rate their Intranet 2.0 tools' quality of content as good or very good.
- ➤ 26% of organizations rate their Intranet 2.0 tools' functionality as good or very good.
- ➤ 22% of organizations rate employee satisfaction with Intranet 2.0 tools as good or very good.
- ➤ 17% of organizations rate executive satisfaction with Intranet 2.0 tools as good or very good.
- ➤ Only 19% of organizations rate their overall satisfaction with their Intranet 2.0 tools as good or very good.

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Barriers to implementation

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

The two greatest priorities continue to be lack of executive support and "other bigger priorities":

- ➢ 22% cite lack of executive support as the primary barrier to implementation.
- ➢ 18% cite "other, bigger priorities" preventing them from implementation.
- ➢ 13% cite lack of interest as the greatest barrier to implementing social media tools.
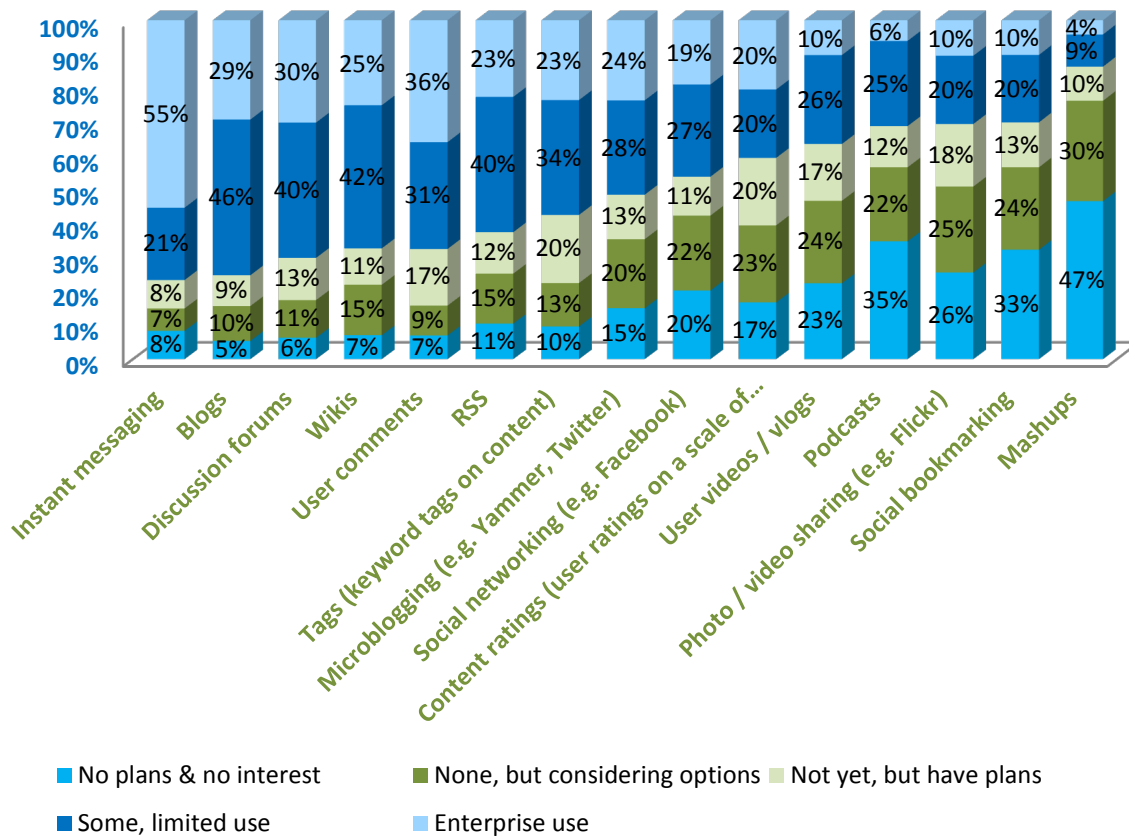
Key Findings

19. SOCIAL MEDIA TOOLS

Q: Which of the following social media tools are being used at your organization?

The five most popular social media tools are instant messaging, blogs, discussion forums, wikis, and user commenting:

- ➢ 76% of organizations have instant messaging.
- ➢ 75% of organizations have blogs.
- ➢ 70% of organizations have discussion forums.
- ➢ 67% of organizations have wikis.
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Legend:
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- None, but considering options
- Not yet, but have plans
- Some, limited use
- Enterprise use

ANALYSIS

The data clearly shows that instant messaging, blogs, forums, and wikis are now commonplace tools in the workplace. Social networking (employee networking) is increasingly popular and on the rise, and is present in 46% of organizations that have at least one social media tool. As the technology that powers intranets continues to improve, intranet vlogs and video-sharing will become more popular.

Recommendations

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; executives must lead the dialogue, control the message, and actively promote social media.

- ➢ **Plan:** Planning is essential 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 supporting policies (terms of use) to govern use and writing.

- ➢ **Technology:** Don't be sold a solution, evaluate and select a social media solution based on business requirements and 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 and HR messages.

- ➢ **Monitor:** Ensure you are 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.

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Final note

Consider an Intranet 2.0 undertaking as an evolution not a revolution. There's no need to solve everything on your first attempt; test and pilot solutions and enhance as necessary before trying to conquer the world.

About Prescient Digital Media

Prescient Digital Media is a veteran web and intranet consulting firm with 10 years of rich history. We provide strategic Internet and intranet consulting, planning, and communications services to many Fortune 500 and big brand clients, as well small and medium-size leaders. We treat each client as unique; we listen to their needs, goals and challenges; understand a client's requirements and potential; and deliver highly effective and innovative website and intranet plans, designs and solutions. In short, we are an intranet consulting firm for hire.

Prescient was founded in 2001 by Toby Ward with the premise that corporate websites and intranets have business value, and should be planned and executed accordingly. Internet and intranet business consulting was and remains our focus today. First and foremost, we are business management consultants that have a superb knowledge of the technology, but we are technology neutral.

Prescient plans and builds highly effective websites and intranets that…
➢ Are demonstrably better than the competition.
➢ Secure stakeholder engagement and support management objectives.
➢ Deliver measurable value by increasing business results and employee productivity.

Prescient's web and intranet experience is wide-ranging and includes, for example:
➢ Planning, launching and managing all aspects of a consumer portal with more than 55 million hits per year;
➢ Transforming an existing intranet (SMB) into a high-powered business system with a two-year ROI of 700% ($1.5 million); and
➢ Transforming an enterprise's intranet and website into highly functional, user-friendly portals that prior to a redesign scored benchmarked ratings of 4 out of 10, and now score better than 8 out of 10, with many accolades from management and customers alike.

Prescient's focus includes the assessment, planning, technology selection, content and launch of intranets, websites, and web-based tools for:
➢ Financial services
➢ Health and life sciences
➢ Energy
➢ Government
➢ Manufacturing and High-Tech

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)

Our clients include:

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