

INTRANET TECHNOLOGY PLATFORMS

SELECTING AN INTRANET TECHNOLOGY PLATFORM

A White Paper by Toby Ward, President

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Introduction

What works well in one organization, may be a disaster in another. IBM's intranet is spectacular, but it would fail in many companies.

Different cultures, different people, different industries, and perhaps most importantly, different processes and levels of user capabilities are all factors in determining the ideal solution to power an intranet.

There are many thousands of solutions to choose from when considering an intranet technology platform, spanning several major categories:

- Content management systems (e.g. Open)
- Portals (e.g. Liferay)
- Web development platforms (e.g. SharePoint)
- Customer relationship management platforms (e.g. Salesforce)
- Social media platforms (e.g. SocialText)

Of course there are other options, including custom built CMSs, databases, and just plain old HTML. Additionally, each category has sub-categories and runs the gamut in pricing: from free open source, to millions of dollars for big name commercial products.

It is very dangerous to assume that since you use Outlook and MS-Office that SharePoint is the best product to power your intranet. If you're a .NET organization, then it might make sense, depending on what you need to do; perhaps you cannot afford it and could likely fulfil 90% of your organization's needs with a mid-tier web content management system (WCMS) from EpiServer or Sitecore, or an enterprise content management solution from Open Text or Autonomy.

If you are not a .NET shop, then perhaps a Java-based product from IBM or Oracle might make sense. But what about open source? What about using Salesforce.com or a hosted social media solution?

The answers to these questions lie in the detailed organization, administrator and end-user requirements for your intranet. When <u>Prescient Digital Media</u> selects a solution on behalf of a client, we weigh and score more than 500 intranet requirements criteria (sometimes up to 700 requirements criteria) for each vendor solution, and we may examine and score more than one dozen solutions, including portals and social media platforms, ECM and WCM solutions. After all of the evaluation and scoring, even then, the choice may not be obvious.

The last five categories are often overlooked, or undervalued. It's important to note that if you decide to go with SharePoint, or WebSphere, or Kentico, or whatever, the solution is very rarely if ever implemented by the company that created the solution (namely the software). Each solution has implementation partners or integrators (in the case of Microsoft, IBM or Oracle, there are many thousands of partners). The solution vendor does not do the development, customization and implementation of your new intranet, the partner or integrator builds your new intranet.

Integrators are not created equal. Some spectacular platforms such as SharePoint, WebSphere or WebCenter may in fact be implemented by fabulously underwhelming integrators. In fact, if your new intranet or website has a problem, or there were problems during the implementation, the problem is almost always the partner / integrator, not usually the creator.

Caveat emptor: don't merely evaluate the solution itself; evaluate the partner or intranet integrator (particularly their experience, financial viability, specific team members and skillsets).

Evaluating and selecting an intranet technology platform is not easy, nor should it be easy. A very expensive and complex solution requires a very complex and detailed evaluation process that should, if not undertaken successfully before, require the assistance of an outside intranet consultant who understands the marketplace and the pros and cons of the intranet vendor landscape.

This white paper will make your job easier providing a perspective and an approach to evaluating solutions, understanding the marketplace, and the key vendors that power most of the world's best intranets.

Best of luck,

Toby Ward, a former journalist and a regular e-business columnist and speaker, is the CEO and Founder of Prescient Digital Media.

What is an intranet?

The intranet, or a closed network, first came into being around 1991, as an internal company or organization network using Internet protocols and technology. An intranet is a private network similar to the Internet that is contained within an enterprise and is for employees and designated contractors. It may consist of many inter-linked local area networks (LANs), desktop computers, websites and portals, email system(s), and a firewall.

Intranet website

The intranet website or home page is normally referred to as the de facto "intranet." Using HTML and other Internet protocols and technology, the intranet home page has become synonymous with the term intranet and it is usually a gateway to most of an organization's network assets including various internal websites, databases and applications.

The intranet website is normally one of many on the corporate intranet, though one may be designated as the "intranet home" which points and links to many other intranet sites and tools. The intranet is built on one of three typical technology platforms:

- HTML (custom built)
- Portal (commercial or open source solution)
- Content management system (custom, commercial or open source solution)

Portal

The corporate portal is a gateway to most, if not all, tools and information on the enterprise intranet. The portal can be a 'catch all' for all of the intranet, or a business unit or function specific portal (i.e. Sales or HR portal).

A corporate portal however is usually synonymous with an enterprise portal solution (e.g. SharePoint or WebSphere Portal), a multifaceted piece of software that has three distinguishing characteristics when compared to the standard intranet home page:

- Advanced user personalization capabilities;
- Security (authorization and authentication); and,
- Enterprise application integration (EAI e.g. ERP, CRM, HR applications)

Content management system

A content management system (CMS) is a database solution that allows non-technical content publishers, authors and owners to publish and manage content (data, documents, multimedia, etc.) to a destination such as a web page, database, or third-party client. CMSs are most commonly used for publishing, storing, controlling, and revising web pages and documents, on an intranet or website.

Intranet evolution

The pre-cursor to an intranet was a mishmash of technologies including LANS, WANS, shared drives, bulletin boards, and emerging email and database systems such as Lotus Notes. The intranet came to be after Internet protocols and technology began to rise in popularity and use with the invention of the World Wide Web in late 1990.

The original intranet, intranet 1.0, typically began as a simple web page on a server – a technology outpost under some techie's desk in the corporate basement. The first version of this intranet was nothing more than a welcome page, perhaps a name and a phone number, and a simple welcome message.

Intranet 1.0 grew and evolved rapidly, more so at some organizations than others, but in some respects, faster than corporate websites who had a few years' head start with the advent of the 'super information highway':

- Version 1.0: Welcome page (a welcome message and a phone number)
- Version 1.1: Bulletin board (simple communications)
- Version 1.2: Corporate newsletter (structured news & limited document management)
- Version 1.3: Help Desk (simple transactions like the employee directory)
- Version 1.4: Corporate Store (more complex transactions such as e-HR and self-service)
- Version 1.5: The Portal (authorization, authentication, application & database integration)

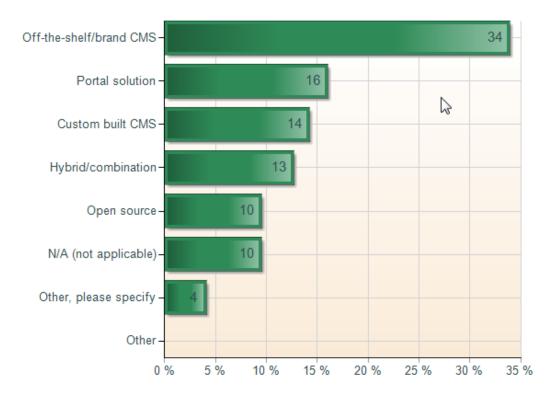
Though not every intranet has followed such a clear evolutionary path; many organizations did not have an intranet until the turn of the millennium, and launched their first intranet with a content management system or portal solution; others skipped versions along the way and have forsaken, for example, a portal solution in favour of today's social media. With the advent of social media, and its explosion in popularity and use, the intranet has made an evolutionary leap to version 2.0 – the social intranet.

Of course not all intranets are created equal; in fact, no two intranets are the same. Many intranets are custom-built using no commercial or proprietary technology (though few are deemed to be successful, there are always exceptions to every rule), while most other intranets are built on content management systems, portals, social media platforms, customer relationship management platforms, or a combination of the above.

Technology platforms

Intranet technology platforms come in all types, sizes and expenses – commercial, open source, or a combination. Many however are built on content management systems (CMS).

According to The Intranet 2.0 Global Study 2010, 77% of organizations use a content management system for their intranet. More than one-third (34%) of those organizations use a commercial or brand name CMS (e.g. Vignette or Sitecore).



Content management systems come in many different varieties:

- Web content management systems (WCMS)
- Enterprise content management systems (ECMS)
- Document management system (DMS)
- Learning management system (LMS)
- Mobile content management system (MCMS)
- And a few other esoteric or uncommon types

Of all the systems, the most common are WCMS and ECMS, representing about 70% of all intranet technology platforms. The remaining intranets are built on portals (about 16%), and custom-built HTML sites, with a handful operating on social media platforms. The remaining systems, such as document management systems and learning management systems, are usually standalone systems on the corporate intranet that serve a specific purpose or business function (e.g. documents), rather than power a central intranet.

Web content management systems (WCMS)

A WCMS or Web CMS is a web software solution for creating, publishing and managing content such as HTML and XML on intranet, extranets and websites. Typically, these systems are database driven solutions that allow non-techie business users, such as those in corporate communications, marketing and HR, to self-publish and manage their own content, including pages, documents, images and other multimedia, without the help of IT.

WCMS solutions come in many, many flavours, sizes, and prices. There are hundreds of solutions on the market, and not one solution owns 50% of the market (note that Microsoft SharePoint is present in nearly 50% of organizations, but does not power 50% of intranets. It is often isolated to a specific business function or unit, and SharePoint is in fact more than a WCMS, it is a fully functioning web development platform that is closer to but even more complex than most portal solutions). Some solutions are free to download (open source solutions such as Plone or Joomla), others are very expensive enterprise solutions that may cost millions of dollars to license and implement in large, complex enterprise scenarios (e.g. 100,000 employee bank).

Of the most popular features that are most commonly considered and evaluated when organizations select and use a WCMS:

- WYSIWYG editor easy to use editor for publishing and editing content
- Search a search engine that indexes the content and returns search query results
- Document management publishing, storing, and managing documents (e.g. Word, PDF)
- Templates pre-configured templates that serve different content types (e.g. news)
- Social media pre-configured templates for blogs, wikis, podcasts, etc.
- Image management feature set for publishing and managing photos
- Link management links always point to the right content, even if the content or URL changes
- Multilingual publishing create, publish and manage content in multiple languages
- Content syndication publish content once and have it update and syndicate to multiple pages and sources (also using an RSS and Atom data feeds to other systems)
- Workflow creating review and approval paths or cycles involving multiple individuals or teams (e.g. communications, HR, legal, etc.)
- Versioning / Archiving ability to retain and restore content for historical purposes or to be repurposed in the future

Pros

- ✓ Quick, easy web page publishing
- ✓ Low cost publishing
- Minimal publisher training
- ✓ Comparatively quick deployment cycle
- ✓ Navigation and design standards
- ✓ Comparatively lower implementation costs (out-of-the-box)
- ✓ Improved managed accessibility compliance

Cons

- Moderate to poor security
- Limited feature set
- Limited or no taxonomies for tagging and classifying content
- Fulfilling legal and regulatory compliance for information management

A list of different WCMS vendors by market type is listed in Intranet Technology Solutions.

Enterprise content management systems (ECMS)

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ECMS solutions are bigger, broader solutions that may include many types of CMSs, including WCMS, DMS, records management (RM), digital asset management (DAM), etc. Moreover, ECM is not merely software or multiple software solutions, but it also encapsulates governance and processes.

In the article, CMS or ECM, Prescient outlines the difference between a standard WCMS and an ECMS:

FEATURE	CMS	ECMS
Capture / Create	Built in editors and integration with MS Office	Built in editors and integration with MS Office, plus integrated scanning or imaging
Manage	Library services and metadata management, approval or editorial workflows	Library services and metadata management, plus records retention and disposal. Complex workflow as part of Business Process Management
Store	Work in progress, staging and 'live' environments may all hold copies of same version	Sophisticated storage management including integration with storage hardware plus 'single instance' storage or other de- duplication technologies
Preserve	Snapshots of websites and content	Long term archiving and digital preservation, more integrated with storage

While there are far fewer ECM solutions than their smaller, less expensive WCM brethren, these solutions are far more complex, and understandably expensive. The market leaders for these solutions include Documentum, Vignette, FileNet, OpenText, Alfresco, and of course SharePoint, to name a few.

As expected, these solutions are generally more expensive than WCMS solutions and typically cost in the hundreds of thousands, if not millions of dollars to implement.

Of the most popular features that are most commonly considered and evaluated when organizations select and use an ECMS:

- Enterprise Search a search engine that indexes the content and returns search query results for content from a variety of sources, including web pages, various databases, document repositories, etc.
- Document management publishing, storing, and managing documents (e.g. Word, PDF)
- Web content management publishing to web pages (WCMS)
- Digital asset management the annotation, cataloguing, storage, and retrieval of digital assets, most notably photos, videos and other multimedia
- Records management storing, classifying, managing (including destroying) organization records, most notably legal, medical and financial records that must maintain a certain form
- Workflow management / Business process management approval and governance processes

Often when many of the above tools are combined with requisite processes and governance they form a collective "knowledge management" strategy, an information management term that is used interchangeably with enterprise content management.

Pros

- Structured and rule-based information management
- ✓ Built-in security
- ✓ Multiple business requirement functions
- ✓ Fulfilling legal and regulatory compliance for information management
- Taxonomies for tagging and classifying content
- ✓ Defined roles and responsibilities
- ✓ Access controls to content
- ✓ Comparatively lower implementation costs (out-of-the-box)

Cons

- Poor usability
- Lengthy and complex user training
- Poor web content management publishing
- Vendor documentation and support

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- Confusing interfaces
- Non-compliant accessibility
- Licensing costs

A list of different ECM vendors by market type is listed in Intranet Technology Solutions.

Portals

Regardless of their moniker – corporate portal, enterprise information portal, or horizontal portals – enterprise intranet portals are relatively new in a fairly small market, dominated by Microsoft

SharePoint, IBM Websphere, and to a lesser extent, Oracle and their portal products (e.g. Webcenter). Portal solutions are extraordinarily complex solutions that tout advanced user personalization, out-of-the-box application integration, and development platforms or framework for building composite applications.

Portals reach multiple points in an organization, and touch many different areas – from finance to operations, HR to IT – and don't necessarily have a single owner. Portals provide a framework for integrating many different applications and processes across organizational boundaries, and can be overwhelming complex for IT organizations that are accustomed to managing simple websites.

Deploying a portal means tackling complex challenges around systems integration, business processes, governance, usability, security, among other issues. In addition to the complexity of these solutions and their implementation, the cost and effort required to deploy a successful enterprise intranet portal is often measured in the millions of dollars.

The drivers behind the decisions by larger organizations to implement a portal tend to be driven more by the business and less by IT. Drivers typically include:

- Improving employee productivity by making it easier to get at information
- Providing customized or personalized access to information & tools
- Reducing ID and password proliferation by providing single sign-on
- Improving security
- Enhancing inventory management and providing supply chain improvements
- Improving operational consistency

While there are many reasons why an organization would implement a portal solution, there exist three principle or over-arching needs fulfilled by a portal solution:

- 1. Enterprise application integration
- 2. Personalization
- 3. Security (authentication / authorization)

With the exception of enterprise resource planning systems (ERP) and enterprise business intelligence systems, there are few software solutions as potentially complex and costly as an enterprise portal solution. And with any complex solution come risks.

Of the most popular features that are most commonly considered and evaluated when organizations select and use a portal:

- Application integration linking enterprise applications such as Business Intelligence (BI),
 Customer Relationship Management (CRM), ECM, WCM, databases, etc., to share information for the benefit of the organization
- Service oriented architecture (SOA) framework for integrating disparate resources and applications written in different languages on different systems to be accessed and retrieved by

- a single composite application, such as a portal, for all to see without the end user having a proprietary piece of software (client) to use each of the different applications
- Security authentication and authorization of users
- Enterprise Search a search engine that indexes the content and returns search query results for content from a variety of sources, including web pages, various databases, document repositories, etc.
- Document management publishing, storing, and managing documents (e.g. Word, PDF)
- Web content management publishing to web pages (WCMS)

Pros

- All-in-one type solutions negating the need for multiple solutions and investments
- Powerful solution and feature sets that can satisfy dozens if not hundreds of business requirements
- One source and destination for information indexing and retrieval
- √ Taxonomies for tagging and classifying content
- ✓ Defined roles and responsibilities
- ✓ Access controls to content
- ✓ Navigation and design standards
- Consistent information architecture
- ✓ Security rules and identity management policies

Cons

- Long deployment cycles
- Poor usability
- × Application and 'gadget' overkill
- Non-compliant accessibility
- Non-standard coding
- Proprietary application servers and software
- Confusing interfaces
- ✗ Limited solution market
- Limited developer / skills / support market
- Expensive licensing
- Expensive support and maintenance

A list of different ECM vendors by market type is listed in Intranet Technology Solutions.

Selecting a solution

Save time, save money – these are the tenets and fundamental drivers behind intranet technology. With thousands of technology solutions to consider – from content management systems to portals and social media platforms, ranging in price from free to millions of dollars - choosing the right system for your organization can be daunting if not an overwhelming exercise.

Any intranet change, implementation or redesign should follow a plan and a process to ensure success. The selection and implementation of a new technology platform requires very careful planning and blueprinting.

Prescient Digital Media uses its own unique intranet project methodology that has been developed over years of experience working with more than 100 intranets.

One prominent financial services firm, a client that wishes to remain anonymous, purchased a CMS for about \$1.5 million. The CMS limited the number of publishers, it limited the number of pages that could be stored and published, and it proved unstable. Worst of all, the company that supported the product went bankrupt, leaving the client with no support. A little more than one year after they implemented the CMS, they decided to scrap it. One wonders if the outcome would be different had they properly addressed requirements and constructed a thorough content management plan.

"I've seen so many organizations that have got burned because they didn't spend the time to really figure out what they wanted," says Gerry McGovern, a Dublin, Ireland-based Web content consultant. "Not all content management systems are the same – not by a long shot. And just because you spend a lot of money on a system doesn't mean that it will do what you need it to do."

Information overload, in particular, continues to plague organizations – especially on corporate intranets where it is eroding employee productivity. Recent studies reveal that the average corporate employee spends 25-35 per cent of their productive time searching for information to do their day-to-day job. "Our ability to create information has substantially outpaced our ability to retrieve relevant information," claims a recent Delphi Group report (Taxonomy & Content Classification, 2002).

"People are lazy," said Cory Doctorow, science fiction writer and technologist, in the Prescient Digital Media article The Search Isn't Broken, We're Broken. "People are remarkably cavalier about their information and how it is stored. This laziness is bottomless..."

In many cases, in most organizations, technology platforms can combat these challenges and significantly improve the content publishing, storage and retrieval process. Specifically, a content management system or portal can offer many benefits and tools including:

- User-friendly, web-based access and use
- Decentralized authoring allowing many authors, in multiple locations
- Document version and time controls

- Content approval workflow
- Database and template creation
- Dynamic page generation
- Link management
- Document conversion
- Personalization
- Access control and built-in security
- Usage analysis

Not all tools offer these benefits, and some offer more or different benefits. Therefore, determining which systems and tools will best benefit your organization depends on the specific requirements of your organization. A content management system's future performance and success is determined before its birth with the identification and documentation of business requirements including:

- Defining the users
- Number of users
- Speed of publishing
- Language requirements
- Page and document limits
- Approval and workflow processes
- Content templates
- Unique features and functionality (e.g. calendar, press releases etc.)
- Content analysis and inventory
- Use of multimedia
- Intranet 2.0 capabilities
- Integration capabilities with existing infrastructure

These requirements and others must be identified prior to evaluating any CMS. Once these requirements are documented, specific evaluation criteria and a content management plan can be developed for evaluating different vendors and CMSs. Failure to develop an integrated plan that for these requirements may result in failure necessitating termination – wasting money, great time and effort, and perhaps your job.

Planning for success

When choosing a CMS or any software product, functional user and stakeholder requirements must be clearly defined. A structured methodology needs to be invoked to not only ensure that the proper vendor is chosen, but that the product has a productive lifespan.

Stanford-based Gartner estimates that one third of IT projects in small to mid-sized companies exceed budgets and schedules by almost 100%; a lot of time and money is wasted due to 'scope creep' in most IT projects.

Scope creep happens when the scope or deliverables of a project change during the project implementation, mainly because of weak planning that doesn't fully account for the business requirements of the organization.

Scope creep is not an 'if', it's a 'when'. Unfortunately none of us has a crystal ball so there is little chance that all future needs can be foreseen. It's the way scope creep is managed that makes for a successful project.

Prescient's proprietary intranet project methodology represents the iterative life cycle for assessing, planning, designing and managing an intranet.



Assessment

Planning begins with the thorough assessment of what an organization needs from an intranet, what employees and users need, the documentation of best practices, and a holistic view of the cost and benefits of a new intranet.

A thorough assessment and the subsequent plan documents the needs of the organization and secures the necessary support and buy-in from multiple stakeholders and business managers – this support is often critical to reducing or eliminating potential scope creep.

An assessment serves two primary purposes:

- 1. Identifies the needs and requirements of users, for the purpose of answering those needs; and
- 2. Identifies stakeholder needs and requirements (and addresses the issue of 'politics' by engaging everyone who has a stake.)

Many will cringe at the idea of trying to document an organization's business requirements for content management even though it need not be a difficult exercise. However, execution is critical. While an external consultant can surely help with such a delicate exercise, especially where there are politics at play, there are a number of tools or steps that should be applied:

- Talk to users: Understand what the user wants and needs, and give them a voice at the table and an opportunity to be heard.
- User survey: Allow the end user community feedback mechanisms to have their voices heard.
- Conduct focus groups: Focus groups allow you to reiterate requirements that were gathered in the preceding steps and to fine-tune your plans.
- Benchmarking and best practices: document successful case studies and practices, and where possible, the competition's intranet and information practices.
- Detail the requirements: Document all the requirements in order to compare and contrast potential vendors.

Planning

Planning is the answer to the assessment – the plan that addresses the needs documented in the assessment.

Failure to develop an integrated plan that accounts for an organization's structure, stakeholder and user requirements will certainly ensure failure and, with it, a loss of significant time, money and jobs.

"Too many intranets and portals fail or don't live up to their potential because they lack direction and often become a political football torn between rival groups and competing priorities within an organization," says Carmine Porco, vice president of Prescient, a veteran consultant who has also worked for Cisco and Deloitte Consulting. "First, you have to get your stakeholders to agree to the strategic plan and vision and on how the intranet should work and evolve. But you also need to understand what employees want and expect; and then marry the two."

Planning incorporates both the strategic vision and the functional plan and maps out the strategic and tactical steps for designing the intranet or portal including:

- Vision and mission
- Goals and objectives
- Governance
- Critical success indicators (KPIs)
- Business case and ROI
- Content management plan & policies
- Change management / communications plans

As well, detailed tactical plans are drafted, including:

- Functional plan
- Information architecture

- Page wireframes
- Design concepts
- Persona development
- Usability testing
- Card sorting

It's never too early to start thinking about a transition plan. A company intranet is an important tool for employees that are most often used daily so employee adoption will be crucial to its success. "One of the most successful intranet adoptions I have experienced was with a company that ran a contest amongst their employees to name the new intranet", says Heather MacFayden. "The contest was a unique way to communicate to all employees that a new intranet was being created and allowed employees to participate in the process."

Technology

The technology phase is where the rubber hits the road in selecting your intranet technology platform — developing your selection criteria, and identifying the vendor solution. There are two aspects to the vendor solution, the CMS platform and the CMS integrator. Typically a short list of potential CMS platforms will be identified first and this will determine the short list of CMS integrators you want to interview.

- Requirements criteria: your criteria should be based on the above planning phases and incorporate the particulars of your information architecture, design, function, security, content management, and application feature set requirements.
- Vendor short list: Make a short list of vendors based on your major criteria such as technology, price range, major functionality, etc.
- Interview vendors: Meet with the short list of vendors to ensure they are a viable solution and try to weed-out the weak ones.
- Conduct an RFP: Build and distribute a request for proposal (RFP) to the short list of vendors and have them compete and 'earn' your business. The quality of vendor RFP responses will be comparable to the quality of the RFP itself. To avoid some if the most common pitfalls, read Falcon-Software's Top Ten Reasons to Reject an RFP.
- Score vendors: Score the vendors based on your detailed requirements in your documentation (Prescient Digital Media utilizes a highly detailed and comprehensive CMS Evaluation Matrix to score each of the requirements which usually number well over 500).

Meet as many people you can: Meet with the company's employees. Talk to the developers, the support team, the account manager, executives, everyone you can to get a feeling for how the company operates. Don't forget about the soft stuff. Don't underestimate the value of pressing the flesh. After all, you will be working closely with the vendor, so you had better like them. Finally, meet with and talk to some of the vendor's clients – if they don't offer client references then back away.

Request demos of the short listed CMS platforms: A demo will allow you to see what the platform looks like, how easy it is to use and how it will meet your requirements. As part of the demo, ask to be shown how to do certain tasks your editors and administrators will need to perform.

Plan for the future: a CMS is a significant investment of time, money and resources – you want to be sure the one you select can support your requirements for the next few years. Many CMS platforms offer out-of-the-box modules to help with rapid development, however these can sometimes be limiting in terms of how much customization can be done. Be sure to evaluate the CMS's customization and extensibility support.

When building detailed requirements for your technology platform consider some of the major criteria:

- Vendor viability (financial viability)
- Vendor experience (specific team members and skillsets)
- Site administration
- Security
- Search
- Managing content (user Interface)
- Template creation and management
- Intranet deployment
- Implementation process
- Bundled applications (e.g. social media)
- Custom application development
- Hardware/software
- Training
- Service and support
- Costs

Ultimately, most organizations are principally concerned with how the technology manages content (managing content) – the CMS's actual publishing functionality and process, and how your employees will use the system. As such, the most important sub-criteria include:

- Web-based interface
- User-friendly editor
- Integration with Microsoft Office/existing publishing tools
- Accessibility guidelines
- Link management
- Navigation and usability
- Application speed
- Metadata, taxonomy
- Multi-site management

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- Personalization
- Search

- Image and multimedia management
- Content expiration, history, version, archive and restore Controls

At the risk of over-simplifying an organization's requirements, the above list is just a sample of the types of criteria one should consider when venturing down the CMS purchase road. Do not underestimate the value of planning ahead, interviewing users/stakeholders, creating and scoring requirements and meeting potential vendors. Without proper due diligence early in the process, an organization runs the risk of wasting a lot of money (sometimes millions), and potentially costing the job(s) of the solution owner. Remember: not all solutions are created equal, and what works well in one organization may not work well in another.

Considerations for short listing CMS Platforms

Open Source vs Commercial — Perhaps just as heated as the MAC vs PC debate is the Open Source vs Commercial debate with equally strong opinions on both sides. As with anything, there are pros and cons to both which need to be considered. The two most important differences are in terms of license cost and support. Although open source solutions do not have any up front licensing fees, this certainly does not mean they are cheaper. There are hidden costs with open source solutions such as support costs and support availability, future development and maintenance. While the initial cash outlay might be less with an open source solution, it can cost more in the time and resources required for development and maintenance. Commercial solutions will include support and upgrades as part of the license fee and by nature of them being a business, are more accountable for their products success.

<u>In-House vs Out Sourced Hosting</u> – This is a very common question for which there is no one answer. The answer will vary depending on project requirements and a company's in-house capabilities. Out sourcing the hosting relieves the pressure from often overburdened IT teams and allows them to focus on other business systems. Deciding to host in-house should be done with full buy-in from the IT team, after all they are the ones that will have to support it and the technology should be compatible with their expertise. For example, if your IT team uses primarily Microsoft products, than a .NET solution would be a clear advantage.

Authentication – Intranets are private, allowing only authenticated users to gain access. How users are authenticated will play into your decision of where to host the site. No employee wants to have multiple username/password credentials, and no IT team wants to manage two sets of credentials for each employee. Most companies are using some form of LDAP to manage employee permissions and roles. Many CMS products (eg Sitecore, Kentico) offer connector modules to allow authentication against a company LDAP. When the site is hosted in-house and all systems are behind the same firewall, there are much fewer security concerns than when the site is hosted externally. There are alternate solutions but understanding your company's security guidelines is important in determining the best method.

Search – Intranets contain a lot of content in a variety of formats – documents, PDFs, spreadsheets etc. and that content needs to easily accessible. Tagging is great but search is key. Most CMS products will include some type of search capability but you need to consider if the search is capable of performing full text searches and if it can search multiple locations. Some CMS products will only be able to search a

single repository and/or search content maintained in their database. Consider how much content you have and where it is located. If your company has multiple repositories you may need to investigate a 3rd party solution such as Google Search Appliance or Coveo.

Check out Falcon-Software's CMS Fight Club for comparisons of leading WCMS products.

Caveat emptor: There is no single solution that will work for all companies. The key is to understand the requirements and including the right balance of people during the evaluation.

Getting help

Prescient's CMS Blueprint assists a company in choosing the proper CMS vendor and end solution. It includes our proven methodology for gathering requirements, a robust CMS Evaluation Matrix, an overview of the present CMS vendor landscape, an RFP template and more.

To engage Prescient for help in selecting the best technology for your organization, please see our <u>CMS</u> or <u>Portal Blueprint</u> service or <u>contact us</u> directly.

To engage Falcon-Software for help in designing, developing and deploying a CMS solution, please visit our website or informative blog site at http://blog.falcon-software.com or contact us directly at 1800-707-1311.

Case Study: ESI International

<u>ESI International</u> is the recognized leader in innovative project management, contract management, business analysis, sourcing management training and business skills training. Serving Fortune Global 500 companies worldwide and nearly every major agency of the U.S. government, ESI provides complete integrated solutions designed to help clients improve business performance. A knowledge-based business based on education, ESI has employees and instructors serving clients in more than 100 countries around the world.

Need

As a company with employees in countries around the world, it is vital that each one has access to the most up to date and relevant information as expediently as possible. The challenge for ESI's existing intranet, ESINet, is that it had not seen any major changes or upgrades since its initial inception more than ten years ago.

There were a number of elements missing from the intranet; interactivity, multi-media, and collaboration, that once implemented would have the potential of turning the resource into a strong business tool that could contribute to ESI's overall business success.

Challenges

- A confusing and incomplete navigation structure: The site needed to provide an intuitive navigation that will enable employees to find key information within a few clicks.
- A design that was void of visual appeal or draw: The tool did not reflect ESI's market-leading position.
- No Content Management System (CMS): Without a robust platform employees could not effectively interact or share their vast knowledge.

ESI was looking to develop a more effective intranet that would support initiatives that advance the business' goals and strategies, including cross-selling, knowledge-sharing across geographic regions and time zones, as well as being able to effectively introduce new offerings around the world.

Solution

Initially engaged only for the initial assessment and planning phase, ESI hired Prescient on for two subsequent phases of the project; technology evaluation and selection, as well as project management of the solution implementation.

Engagement Summary:

Phase 1

- Intranet evaluation
- Benchmarking
- Requirement interviews
- Focus Groups

- Employee survey
- Strategic planning
- Governance
- Design
- Content Management Planning
- Functional Planning

Phase 2

- Technical environment and needs analysis
- CMS Solution selection process

Phase 3

Project Management of selected CMS Solution implementation and launch of new site

Results

The 11 month, three phase project resulted in a total overhaul of ESI's intranet.

The new, rebranded intranet, ESIWord, was launched in January 2008 during ESI's annual Global Sales conference by the organization's president, John Elsey.

The new global site, build on SiteCore's CMS, now provides employees with an engaging online environment in which they can access and share, in real time, information and resources that will support the maintenance of the current position as the world leader in professional Project Management training.



New ESIWorld, ESI's new intranet home Page

Case Study: The Forzani Group

The Forzani Group Ltd. (FGL) is Canada's largest national retailer of sporting goods, offering a comprehensive assortment of brand-name and private-brand products, operating stores from coast to coast. FGL's corporate banners include Sport Chek, Sport Mart, Atmosphere, National Sports, Athletes World and Hockey Experts. The franchise banners include Sports Experts, Intersport, Atmosphere, Nevada Bob's Golf, Hockey Experts, Fitness Source, S3 and Tech Shop. All stores offer brand-name sports and lifestyle products, as well as a number of private brands. The company employs over 14,000 people in communities across Canada and trades on the Toronto Stock Exchange.

Need

- Improve communications between corporate and employees at both head office and the 229 stores.
- To reduce the amount of email received by employees each day by providing them with a better channel for communicating 'light' information.
- Help improve employee engagement at FGL and ideally improving the connection to FGL for store employees.

Challenges

The existing FGL Intranet site was unable to achieve new communication directives. Some of the major issues that contributed to the inflexibility of the Intranet site included:

- An outdated look and feel of the Intranet.
- The site consisted of 80% dead or outdated content.
- The site's code structure as well as its general technology backbone was severely flawed and required major rework as it lacked scalability. It was becoming increasingly difficult for FGL to support and maintain, let alone build upon.
- Initial purpose of the Intranet, with its multitude of user groups had deviated since its creation and was being neglected in adding new features and technology improvements.
- Due to the lack of content focus or ability to update the site, FGL had to resort to workarounds for internal communication (mass internal emails, paper communiqués, etc). This unfortunately resulted in a negative impact counterproductive to the Intranet's intended purpose.

Solution

FGL was looking for a web development firm that specializes in content management software integration, providing services and support for all aspects of the development lifecycle of FGL's proposed new Employee Intranet. Combining the information Falcon-Software collected during the discovery stage, discussions with FGL and Falcon-Software's knowledge and experience developing corporate Intranets, we defined the scope of work for the project to include the following:

 Providing project management, expert knowledge and support specifically around the complexities of implementing a CMS driven Intranet site.

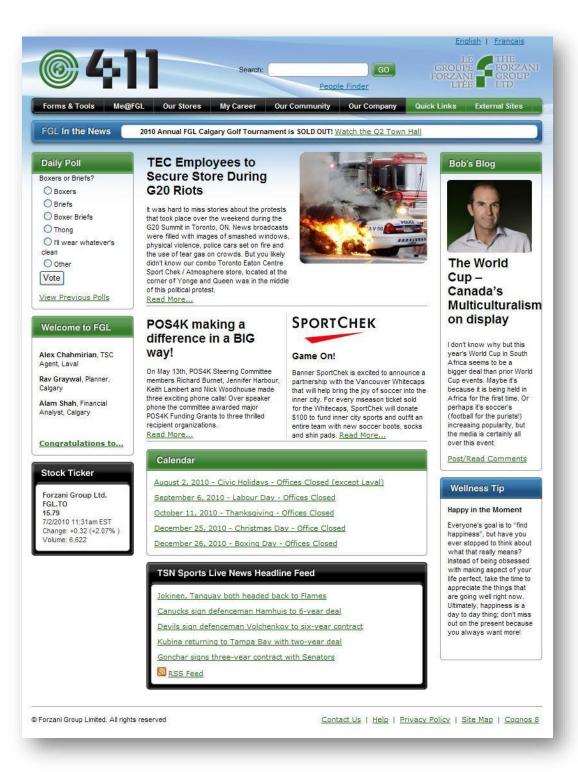
- Work with FGL's graphic team and marketing team to create a user interface for the FLG Employee Intranet that provided a compelling user experience while effectively conveying the values and brand image of FGL.
- Work with FGL's Information Architect to structure the Employee Intranet's information
 architecture, taxonomy, and page layouts to focus on overall usability making it easy for
 everyone to use the Intranet, resulting in a high level of user adoption by employees.
- Architect and develop a scalable and flexible Intranet platform that will serve as the foundation for FGL's Employee Intranet and allow for continuous improvements and advanced web services/applications to be integrated into the system in the future.
- Recommended potential features and functionality additions to the Employee Intranet Project for consideration.
- Provide sufficient training and ensure internal procedures are in place to secure a high adoption rate of FGL's internal users of the CMS.
- Provide support services to FGL's staff during the project and post-project release.

Key Achievements

- Bilingual Intranet With stores across Canada, providing content in both English and French was very important. The CMS allows FGL to translate all content that is presented on the Intranet.
- Active Directory Syncing A key challenge of this Intranet was managing the employee profiles
 and login credentials while minimizing the effort required. User data, including profile and login
 credentials, are synced from FGL's internal Active Directory to the CMS.
- Content Scheduling With content scheduling, FGL is able to prepare content ahead of time and determine when that content will be visible on the website. This allows FGL to keep the Intranet content fresh while minimizes the effort required by content administrators.
- Community Bulletin Board The bulletin board allows FGL store employees from across the country to communicate with each other.
- CEO Blog Another system geared to creating a sense of connection between the employees and executive management.

Result

Falcon-Software provided an Intranet solution that allowed FGL administrators to easily create and modify content in multiple languages keeping the Intranet fresh, current and relevant to their thousands of employees across Canada.



FGL's 411 CMS Intranet Home Page Developed by Falcon-Software

Intranet technology solutions

The following is a thorough, but not exhaustive list of the biggest, most common and secure intranet technology platforms. While there are thousands of solutions, the following list is focused on market leaders and leading solutions:

Enterprise scale solutions

- Alfresco Enterprise (open source ECM)
- Autonomy Interwoven (ECM and search)
- Broadvision Portal (ecommerce and portal solution)
- EMC Documentum (ECM)
- IBM Websphere (portal solution)
- IBM Filenet (ECM)
- IBM Lotus Web Content Management (WCMS)
- Microsoft SharePoint (web development platform & portal solution)
- OpenText ECM Suite (ECM)
- OpenText Vignette Portal (portal and ECM)
- OpenText Vignette Content Management (WCMS)
- Oracle Webcenter (middleware and portal solution)
- Oracle Weblogic (middleware and portal solution)
- Oracle ECM (ECM)
- Oracle Universal Web Content Management (WCMS)
- Red Hat JBoss Enterprise Portal (open source portal solution)
- SAP Netweaver (ERP portal)
- Salesforce (CRM platform)

Large scale solutions

- Day Communique (WCMS)
- Fatwire (WCMS)
- eXo Portal (open source portal)
- Liferay Portal (open source portal)
- Percussion CMS (WCMS)
- Sitecore (WCMS)
- SDL Tridion (WCMS)
- uPortal (open source portal)
- Yammer (social media platform)

Medium scale solutions

- Active (WCMS)
- Alterian (WCMS)

- Alfresco Share (open source ECM and social media platform)
- Atlassian Confluence (social media platform)
- Docuware (ECM)
- ConnectBeam (social media platform)
- CoreMedia (WCMS)
- Clickability (WCMS)
- CrownPeak (WCMS)
- Drupal (open source social media platform & WCMS)
- e-Spirit (WCMS)
- Enonic (WCMS)
- eZ Systems (WCMS)
- Ektron (WCMS)
- EpiServer (WCMS)
- Google Sites (ECM and social media platform)
- Hannon Hill (WCMS)
- Ingeniux (WCMS)
- Jive (social media platform)
- Joomla (open source WCMS)
- Kentico (WCMS)
- KnowledgeTree (DMS)
- Mindtouch (ECM and social media platform)
- Newsgator (social media platform)
- Ning (social media platform)
- OpenText RedDot (WCMS)
- pTools (WCMS)
- PaperThin (WCMS)
- PB Works (social media platform)
- SocialText (social media platform)
- Spring CM (ECM)
- Telligent (social media platform)
- Telrik SiteFinity (WCMS)
- Traction (social media platform)
- ThoughtFarmer (social media platform)
- The Level (WCMS)
- VYRE Unify (WCMS)

Small scale solutions

- Blogger (open source blogging platform)
- DotNetNuke (open source WCMS)
- Hippo (open source WCMS)

- IGLOO (social media platform & WCMS)
- Lyris Hot Banana
- OpenCMS (open source WCMS)
- Plone (open source WCMS)
- SocialCast (social media platform)

INTRANET TECHNOLOGY PLATFORMS

- TYPO3 (open source WCMS)
- Umbraco (open source WCMS)
- WordPress (open source blogging platform and WCMS)

To engage Prescient for help in selecting the best technology for your organization, please see our CMS_ or Portal Blueprint service or contact us directly.

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Social intranet matrix

From mundane to social: intranets are rapidly evolving into social media systems that greatly distance themselves from their former, glorified brochure ware sites.

To be clear, for those still learning about a concept that has really only emerged in recent months, and was only formally defined this year (see <u>The Social Intranet white paper</u>), a social intranet incorporates multiple social media tools that are available to most if not all employees (with at least some minimal integration into the intranet or portal home page).

The following is a success factor comparison matrix for traditional intranet 1.0 and the social intranet, intranet 2.0. This matrix is based on real experience with dozens of intranets of various sizes and industries (approximately 5000 employees on average). The table below represents a summary matrix of the evaluation methodology used by Prescient Digital Media.

Success Factors	Intranet (1.0)	Social Intranet (2.0)
Design	 Design reinforces corporate brand Site has limited employee presence Utilizes the corporate color palette and brand 	 More simplistic design, less colour, bigger fonts and buttons Greater incorporation of employee presence, including real employee photos Design employs shading behind priority content; icons for ratings and key information
Layout	 Three to four columns Significant banner Emphasis on content, links, and standard / stock photos Global navigation is largely contained to banner Text to white space ratio of 70/30 Search engine may be in banner or on home page Publishing mechanism is hidden and not accessible from home page 	 Two to three columns Minimal banner or no banner Emphasis on one or a few headlines with supporting text; minimal navigation links Text to white space ratio of 60/40 (or approaching 50/50) Global navigation is minimal if not limited to a single home button & search engine Search engine is an input box rather than a link Access to social media tools from home page Content is supported by employee photos
Content	 Centralised content publishing; some distributed authorship Limited content standards (if any) Limited if any content management platform (possibly some 	 Decentralized content publishing; full database driven content management Open opportunity to use social media tools for most or all employees with

	standardized templates) - Content publishers are sometimes trained and follow central standards	 intranet access Increasing amounts of EGC (employee generated content) including wiki and blog posts, user comments, tags, bookmarks, etc. Content is published via a central platform, that usually includes blogs, wikis and other social media tools (though sometimes these tools are separate from the central platform)
Usability	 Confused navigation and top heavy information architecture A working search engine (limited value) Some use of meta tagging Has working links and global navigation 	 Employees can locate information based on "people" (e.g. employee profiles, blogs, tags, etc.) Intuitive technology enables easy self-creation and updating of employee profiles Search is still an enabler, but less of a navigation necessity
Planning & Governance	 No explicit or documented plan Performance measures are minimal and often limited to HITS No explicit or documented ownership and governance model Intranet stakeholders often mired in politics over ownership and how to evolve the intranet No intranet policy 	 Plan with mission, goals and objectives is understood and agreed upon by key stakeholders Intranet is supported with critical success factor tracking and measures (KPIs), possibly including ROI and user satisfaction and engagement metrics Performance measures are actively monitored and tracked versus the baseline An explicit ownership and governance model is documented and supported by all (most) Intranet and social media policies dictate the dos and don'ts, and the rules for owning and publishing content, and for contributing blog and wiki posts, and user comments and tags
Tools	 Basic search Employee directory Some employee self-service Preliminary content management Some multimedia features Occasional instances of personalized portal 	 Executive and/or employee blogs Discussion forms / user comments Wikis RSS Instant messaging Social networking (employee networking)

 Social bookmarking Podcasts, vlogs User tags, folksonomy Mash-ups / composite applications

To learn more about the complete Prescient Digital Media intranet evaluation methodology of over 400 intranet variables, please contact us at prescient@prescientdigital.com or call us at 416-926-8800 (www.prescientdigital.com).

ABOUT PRESCIENT DIGITAL MEDIA

Listen. Understand. Deliver.

We are the original intranet consultants; The Intranet Experts.

Prescient Digital assesses, plans, designs and builds world-class intranets and enterprise solutions for Fortune 500 and big brand leaders. We are recognized experts in this space for more than 18 years working with over 300 organizations. We are technology agnostic, working with many technology platform, but most of our clients run SharePoint and Office 365, for which we have particular expertise.

Headquartered in Toronto, Prescient works for global corporations in various industries and sectors worldwide. Our core strength lies in understanding and balancing the digital needs of our clients' business models, with the goals and intents of the people who will ultimately use these digital solutions. We see the digital workplace as the primary means to manage your most important relationships with your employees, beginning with the hub or gateway, the intranet.

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.

Some of our clients:



Having worked on more intranets than any firm of our size, we are simply one of the best at planning, designing and delivering highly effective intranets and digital workplaces. We are the:

- First to develop an intranet specific methodology and service approach
- First to study and define a social intranet
- First to study and define intranet governance
- 15+ awards including a Webby Award.

Why Prescient

- Prescient boasts a full roster of world class, Fortune 500 clients.
- We build success measures (key performance indicators) into every project.
- Prescient has an extensive list of global, expert speaking engagements with dozens of conference, seminar and webinar events every year.
- Our work has won more than 15 awards including a prestigious Webby Award.
- Prescient has the most published team of experts of any firm in its class with hundreds of published articles to date.

Expertise

Our leaders have rich, hands-on expertise and 25 years of experience. We know the industry inside out because we've been inside it as it evolved. We have worked alongside hundreds of customers, from Fortune 500 companies to small and medium sized businesses alike. Our leaders have held senior management positions at reputable companies and brought all their expertise and knowledge together in Prescient. We use proven methodologies, to deliver measurable results that are superior relative to other companies.

Focused on Each Client

No two clients are the same. All organizations have different cultures, structures, workflows, communication channels, resources, directions, objectives, and so on. Therefore, your intranet must be customized to your business, to meet all your unique needs. This is the reason why our in-depth consulting methodology (Listen. Understand. Deliver.) is so central to our work and focus on our clients.

We are the original intranet consultants; The Intranet Experts.

For more information, call us at 416.926.8800 or visit www.PrescientDigital.com