



Intranet 2.0

Rise of the Social Intranet:
Summary Report of the Intranet 2.0 Global Study 2010

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From: Prescient Digital Media
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Introduction

This is the free summarized, version of the Intranet 2.0 Global Survey analysis report (11 pages). Participants of the survey will be sent the full version of the report for free. The full \$89 report is also available for free to members of the media (please contact us directly for a copy) at www.PrescientDigital.com or by phone 416.926.8800.

526 participants from organizations of all sizes from across the planet participated in the Intranet 2.0 Global Survey 2010 and the results reveal rapid adoption of social media on the corporate intranet in the past two years. The survey was led by Toby Ward, President, Prescient Digital Media, and conducted online during the winter of 2010.

Geographical representation:

- 35% of respondents/organizations are from the U.S.
- 26% from Europe
- 12% from Canada
- 10% from UK
- 8% from Australia / New Zealand
- 6% from Asia, South America, Africa and the Middle-East

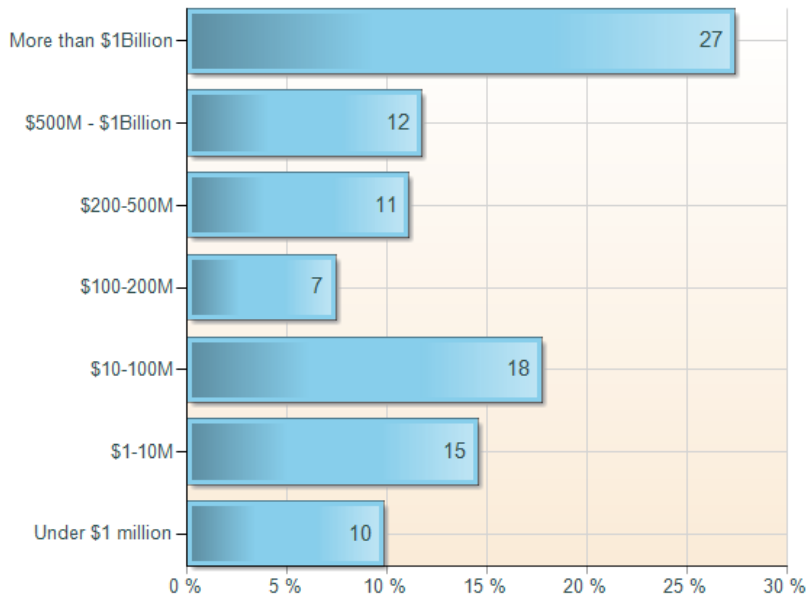
Intranet size (Employees with access):

- 41% of the organizations have 1 to 1,000 employees (small)
- 35% have 1,000 to 7,500 employees (medium)
- 25% have 7,500 or more employees (large)

Intranet size (Organization revenue):

- 25% of the organizations have annual revenue of \$10 million or less
- 36% have annual revenue of \$10 million to \$500 million
- 39% have annual revenue of \$500 million or more

What is your organizations's annual revenue?



Intranet maturity:

- 20% of organizations have had an intranet for 3 years or shorter
- 25% have had one for 4 to 6 years
- 56% have had one for 7 years or longer

Organizations by industry:

- 14% of the organizations are from financial services
- 13% from technology/technical
- 12% from government
- 11% from professional/consulting services
- 8% from healthcare
- 5% from not-for-profit organizations
- 4% respectively from energy, retail/consumer goods, manufacturing, B2B, & telecommunications
- 3% from media/entertainment companies

For more information

For more information on the Intranet 2.0 Global Survey 2010, or for help identifying, planning and implementing Intranet 2.0 tools, please contact Prescient Digital Media directly via the website (www.PrescientDigital.com) or phone 416.926.8800.

Executive Summary

Social media tools such as blogs, wikis and other vehicles, have become mainstream and are present on 87% of organization intranets (regardless of size). Less than 10% of organizations have no interest and no plans for implementing at least one social media tool on their intranet.

Intranet blogs, discussion forums and instant messaging are quite pervasive, while podcasts, mash-ups and social bookmarking remain an after-thought at most organizations. The most common Intranet 2.0 tools found in organizations are as follows:

- 53% have intranet blogs (an 18% increase from last year's survey); 18% have deployed blogs enterprise wide; only 8% have no plans or interest in deploying blogs
- 52% have intranet discussion forums (a 13% increase from last year's survey); 23% enterprise use; 9% have no plans or interest
- 51% have intranet instant messaging (an 11% increase from last year's survey); 34% enterprise use; 19% have no plans or interest
- 49% have intranet wikis (a 4% increase from last year's survey); 17% enterprise deployment; 11% have no plans or interest
- 44% have intranet RSS (an 19% increase from last year's survey); 18% enterprise use; 14% have no plans or interest
- 27% have intranet social networking (a 42% increase from last year's survey); 13% enterprise use; 19% have no plans or interest

Technology platforms

More than three-quarters (77%) of organizations are now using a CMS for their intranet (compared to 63% in September 2009):

- 34% use an off-the-shelf solution CMS
- 16% use a portal solution
- 14% use a custom built CMS (home grown CMS)
- 13% use a hybrid/combination
- 10% use open source (no change)

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 35% market share. Microsoft SharePoint continues to be the leading CMS and its popularity in organizations is growing.

- Microsoft SharePoint is used by 34% of those that use a CMS
- Bitrix, Drupal, IBM WebSphere, Joomla, OpenText and Vignette each have 2-4% market share
- No other solution was cited by more than 9 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):

- 53% of organizations use SharePoint
- 18% of organizations use WordPress
- 15% of organizations use Facebook
- 13% of organizations use Confluence
- 13% of organizations use Google Sites

Despite all the hype and regular attention and press they receive, Lotus Connections (Quickr) and SocialText are only present in 5% and 2% 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:

- 47% have spent \$10,000 or less
- 33% have spent between \$10,000 and \$100,000
- 20% have spent \$100,000 or more

Satisfaction

Satisfaction levels are still underwhelming and need improvement particularly amongst executives, but have risen somewhat over the past year:

- 46% of organizations rate the tool functionality as good or very good; 13% rate them as poor or very poor
- Satisfaction rates with executives are still dangerously low: only 35% of executives rate the 2.0 tools as good or very good; 29% 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:

- 32% of respondents cite lack of a business case as the greatest challenge
- 31% of respondents cite lack of executive support as the greatest challenge
- 27% of respondents say lack of IT support is the greatest barrier to implementation

Key Findings

Question 7: Intranet 2.0 Tools

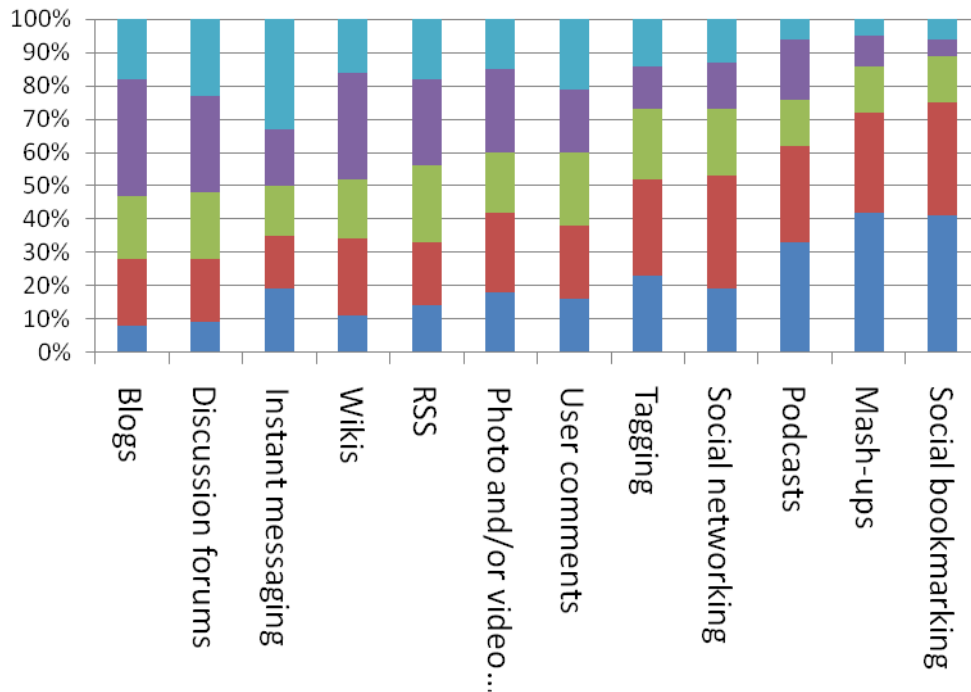
Which of the following Intranet 2.0 tools are being used at your organization?

Findings:

Social media tools such as blogs, wikis and other vehicles, have become mainstream and are present on 87% of organization intranets (regardless of size). Less than 10% of organizations have no interest and no plans for implementing at least one social media tool on their intranet.

Blogs, discussion forums and instant messaging have become mainstream, and are now present in more than 50% of organization intranets (regardless of size):

- 53% have intranet blogs (an 18% increase from last year's survey); 18% have deployed blogs enterprise wide; only 8% have no plans or interest in deploying blogs
- 52% have intranet discussion forums (a 13% increase from last year's survey); 23% enterprise use; 9% have no plans or interest
- 51% have intranet instant messaging (an 11% increase from last year's survey); 34% enterprise use; 19% have no plans or interest
- 49% have intranet wikis (a 4% increase from last year's survey); 17% enterprise deployment; 11% have no plans or interest
- 44% have intranet RSS (an 19% increase from last year's survey); 18% enterprise use; 14% have no plans or interest
- 41% have photo and/or video sharing (first year of study); 16% enterprise use; 18% have no plans or interest
- 40% have intranet user commenting (first year of study); 21% enterprise use; 16 have no plans or interest
- 28% have intranet tagging (first year of study); 15% enterprise use; 23% have no plans or interest
- 27% have intranet social networking (a 42% increase from last year's survey); 13% enterprise use; 19% have no plans or interest
- 24% have intranet podcasts (an 4% increase from last year's survey); 6% enterprise deployment; 33% have no plans or interest
- 14% have intranet mash-ups (a 75% increase from last year's survey); 5% enterprise use; 42% have no plans or interest
- 11% have intranet social bookmarking (a 6% increase from last year's survey); 41% have no plans or interest



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

Analysis:

Nearly a half dozen of these tools are present in nearly 50% of organizations. Not surprisingly, blogs are the most popular. Of those tools that are growing in deployment the fastest: mash-ups, RSS, social networking and blogs. The prevalence of mash-ups on corporate intranets grew 75% over the past year; social networking grew by 42%. This growth is fuelled by the value they deliver, the ease of deployment (particularly when bundled in CMS or portal solutions), and the frequency of use and popularity of these tools amongst frontline employees and executives alike in their personal lives.

An organization without Intranet 2.0 tools, or plans to use them, risks being out-manoeuvred by the competition. While podcasts and photo & video sharing are not well used, and have questionable value when compared to other alternatives, wikis and blogs are becoming mission-critical tools in some organizations. 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).

About Prescient Digital Media

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:

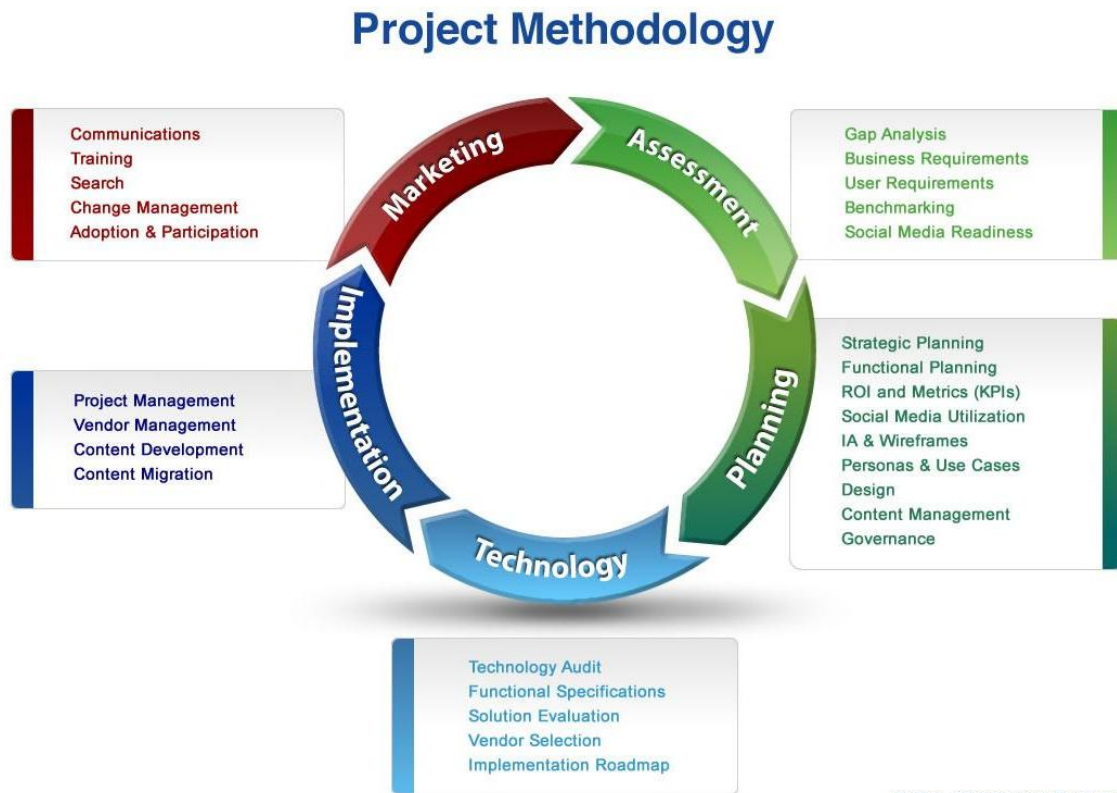
- Analysis (evaluation, business requirements, user research, benchmarking)
- Planning (strategic planning, functional specifications, information architecture)
- Technology (platform and application evaluation, selection, and implementation)
- Implementation (design, integration, content, tools)
- Marketing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

Some of our clients include:



Intranet Project Methodology:

The Intranet Project Methodology © 2001 - 2010 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).



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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.IntranetBlog.com

Follow us on Twitter – <http://twitter.com/intranet2>

Join the Intranet Global Forum on Facebook – www.facebook.com

View our presentations on intranets on our SlideShare channel – www.slideshare.net/prescient

Watch Toby discussing the future of intranets – www.YouTube.com/watch?v=kaTMOTpRVQk

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:

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