Intranet Focus Ltd

Intranet strategy, design and implementation

Intranet Governance

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Revised April 2007

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Martin White is Managing Director of Intranet Focus Ltd., which he established in 1999. Martin has written the Behind the Firewall column on intranet management issues for the US magazine EContent (http://www.econtentmag.com) since 2001, for which he is a Contributing Editor, a position he also holds for Intranets: Enterprise Strategies and Solutions (http://www.intranetstoday.com) and for which he is Reviews Editor. Martin was a workshop leader for Nielsen Norman User Experience events in 2005 and 2006, and is also taking part in the 2007 event.

Martin is the author of The Content Management Handbook, which was published by Facet Publishing Ltd in early 2005. His latest book, Making Search Work, was published in March 2007, also by Facet Publishing.

Martin was Chairman of the Online Information Conference (http://www.online-information.co.uk) from 1999-2006. In 2005 he was the recipient of the Information Industry Award for Lifetime Contribution. He has been Visiting Professor at the Department of Information Studies, University of Sheffield http://www.shef.ac.uk/is since 2002 and is a member of the Governing Board of CAB International. (http://www.cabi.org), acting as Chairman of the Finance and Audit Committee. He is also a member of the Publications Board of the Royal Society of Chemistry.

The Company: Intranet Focus Ltd

Designing and enhancing intranets and extranets

For organizations that have not yet set up an intranet we can carry out an information audit to confirm the information requirements needed to achieve the objectives of the organization, and from these develop a content strategy, information architecture and governance structure.

For organizations that have an intranet, or a number of departmental intranets, we can assess their design against current good practice, and undertake user surveys and usability tests. We can develop information architectures and metadata schemes. The business experience of our consultants enables us to support multi-national/multi-lingual intranets. We also provide guidance on the integration of intranets as the result of a merger or an acquisition.

Content Management and Search software selection

We support the selection and deployment of content management software. We can develop a content management strategy, and from this prepare a formal RFP that can be sent out to a short list of vendors. To assist in the selection of a vendor we have developed a checklist based on our experience in major projects in North America and Europe. Once the vendor has been selected we can work with the client and the vendor to develop realistic implementation and content migration strategies. We can carry out similar projects for the selection of enterprise search software and corporate portal software. We maintain complete independence from any vendor.

Introduction

There are three elements of an intranet strategy, and they are an information/content strategy, a technology strategy and a governance strategy. It is in the development of a governance strategy that most organisations fail to take account of organisation issues, especially organisation culture. Governance is more than "management", though a management structure is required. However it has to be said that in my experience few organisations do have a formal intranet strategy, or if they do it was prepared several years previously and has never been reviewed and revised.

A governance strategy should include
- Documenting the objectives of the intranet, and ensuring they remain in line with organisational requirements
- Establishing and monitoring performance standards
- Establishing and monitoring standards and good practice
- Improving use and usability on a continuous basis
- Creating rewards and penalties for non-conformance
- Setting out job descriptions for intranet-related tasks
- Marketing the intranet

1. Intranet management structure

A common issue in many organisations is the decision on who should 'own' the intranet. The problem is that there is no standard answer, as it depends on a number of different factors, including organisational structure and organisational culture. Let me try to explain.

2. Information, technology and governance

A look at the Intranet Focus Ltd web site will show that these are the three elements that we see as forming the platform for any intranet strategy. An ownership decision based on organisational structure tends to want to take the 'tidy' route to management. Everything else in the organisation reports into one department so what not the intranet? There is a logic behind that, but a false logic. The fundamental problem with an intranet is that it is on every desk top in the organisation. With the exception of MS Office/Outlook it is probably the only application that is on every desk top and so the normal rules of divide, conquer and take the plaudits do not apply. Of all the departments in an organisation IT, HR and Internal Communications are probably the only ones that touch every employee at every level in an organisation. However only large organisations have an Internal Communications department so the choice usually comes down to HR and IT.
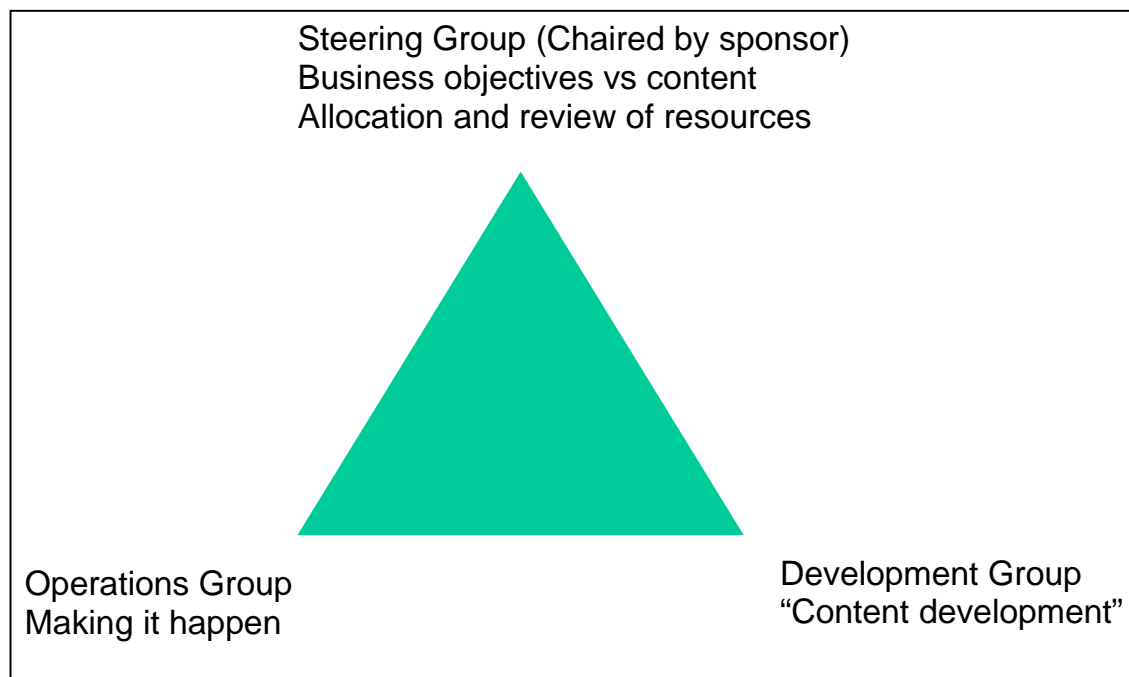
From a technology perspective an intranet is boring. It's nothing more that a heterogeneous mess of HTML, MS Office and pdf files loosely assembled onto a web server. Even the excitement of installing a CMS is soon tempered by the realisation that it is nothing more than a database application. Portals are different! We have yet to find a portal application masquerading as an intranet that was not driven by an IT department

with an interest in using SharePoint or BEA AquaLogic and needing an application to make the business case for the license costs.

There is another aspect of technology though, and that is the CMS implementation that is referred to above. The case is often made that since the same CMS is being used for the web site (which probably got it first) and the intranet then it should be Marketing Communications that take responsibility for the intranet. The case is made on the basis of sharing expertise and of reducing support and training costs. There are some fallacies here that need to be addressed. If there is a major training requirement and a substantial need for ongoing support for an intranet CMS application then you have bought the wrong CMS. An intranet CMS has to support ad hoc use by people who are not being rewarded for intranet content addition and see the need to work through a 500pp user manual as the final frontier. Moreover Marketing Communications is all about communicating with the external world, and employees have very different information and knowledge needs.

So what about either Internal Communications or HR? To an extent Internal Communications is about the bulk transfer of information to employees and HR is about some very specific information to individual employees. Neither really get involved with understanding how better business decisions can be made with effective access to internal and external information.

Over the last few years we have found that the following management structure has worked well. Even if all the members of the Operations Group are in one single department adding in the Steering Group and the Development Group ensures that an organisational view is taken of requirements and resourcing.

Steering Group (Chaired by sponsor)
Business objectives vs content
Allocation and review of resources

Operations Group
Making it happen

Development Group
"Content development"

The Intranet Strategy Group is chaired by the sponsor of the intranet and the roles include

- Monitoring performance against objectives
- Allocating resources and budgets
- Ensuring that the objectives of the intranet remain in line with business requirements
- Ensuring that agreed standards and good practice guidance are met

Of course this brings up the question of who should be the sponsor of the intranet. All the evidence suggests that without a senior level sponsor intranets do not flourish and have a significant benefit to the organization. There is a danger in having a sponsor that is too senior. Although the having the Chief Executive as the sponsor may seem ideal at the time in practice someone at this level just cannot spend the time in the meetings that will be essential if the intranet is to develop to meet changing organization needs. A sponsor who at least reports to a Senior Vice-President/Divisional Director is probably about right. The key issue is the extent to which the sponsor has access (even if indirectly) to the financial and other resources that the intranet will require.

The second group is the Intranet Operations Group. This Group comprises the intranet manager, other members of staff operationally concerned with the intranet, and a member of the IT department. This Group is responsible for the day-to-day operations of the intranet.

The final group is an Intranet Development Group. This is in fact a group of users, but there are merits in giving the Group the remit of identifying ways in which the intranet could be enhanced. The Chairman of the Operations Group and the Development Group are also members of the Strategy Group. This model ensures that there is some creative tension within the governance structure, and that a balance is therefore kept between the requirements of users, the resources allocated by the practice and the overall business requirements of the practice in terms of internal information access.

3. One intranet or many

The issue that many organizations have to address is whether to have "one" intranet, or to allow each department to create their own intranet. There is no right answer. A governance model is set out in Figure 2 illustrates the situation for an intranet which is in effect a federation of sub-sites developed by each department.

At the top are the intranet home pages. These will be a mixture of immediate news and navigation pages. Easily accessible from the top level of the intranet will be directories and glossaries. The directories could include staff and expertise databases, and also links to other database applications.

In the model proposed the home pages of each department are set out to agreed standards which are monitored by the intranet team. The aim of these standards (denoted by the letter S), which are mandatory, is to ensure that there is adequate definition of the scope of each sub-intranet, and that navigation between these sub-intranets can be achieved effectively. In particular all the navigation must be to the end

that it is not necessary to know the departmental location of a document, or that a particular department is responsible for that business activity. Ideally the intranet should support business processes, and not be solely the access route to a document repository.
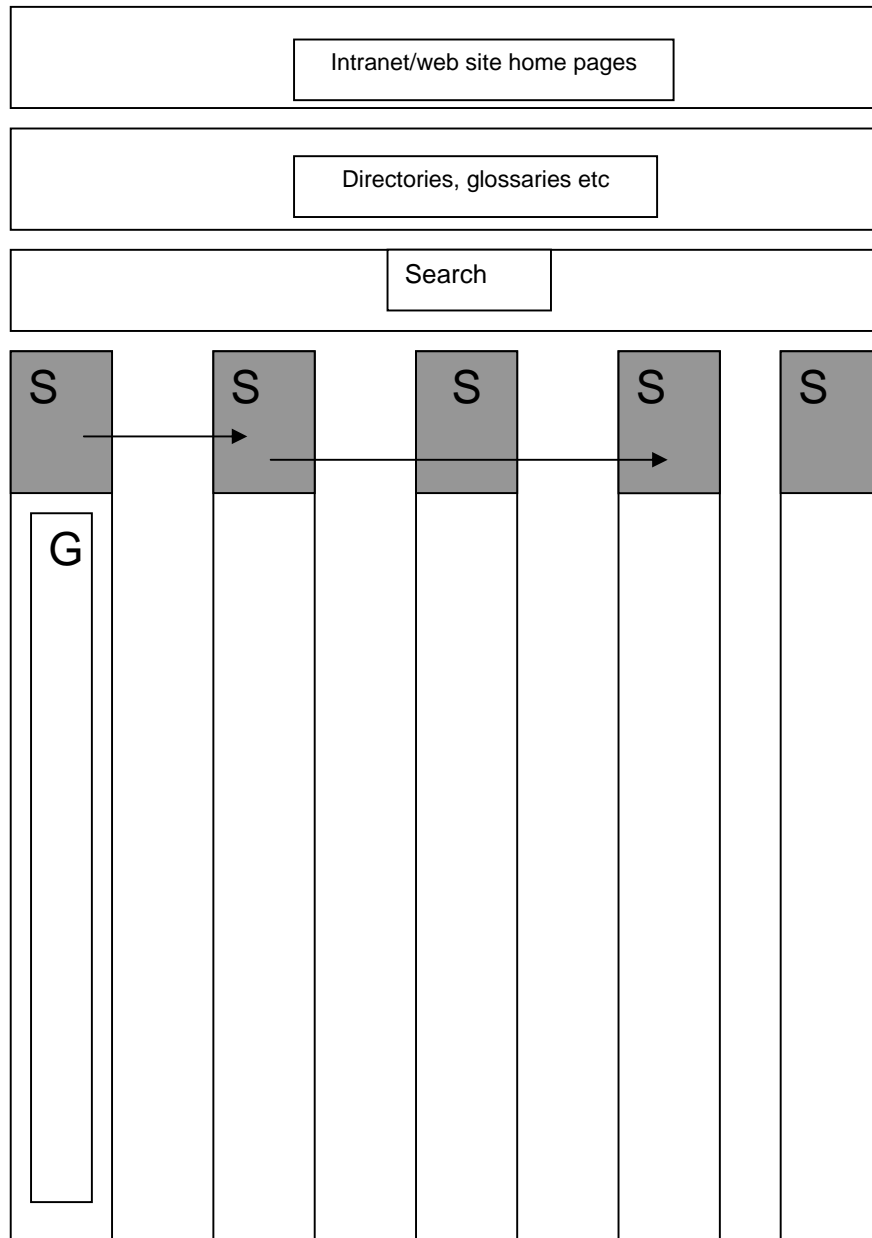
Figure 2. Governance model for federated web environments

Mention has been made of standards and "good practice". It is important not to confuse the two. There should be a minimum number of standards, and these relate to file formats and sizes, metadata, disabled access and the requirement to maintain content. Any failure to meet these standards should be regarded as a serious matter.

In addition there would be good practice guidelines (denoted by the letter G) that evolved over a period of time but which would not be mandatory, and so enable each department to create a look and feel that represented its own work environment, but without sacrificing the integrity and value of the intranet as a whole. These would be maintained primarily by peer pressure. The experience in many other organisations is that once other departments see the benefit of conforming to standards and adopting good practice they are keen to do likewise, leaving any department taking a contrary approach very visible indeed.

Good practice may change from time to time, and could relate to some aspects of the information architecture, the way that pages are laid out and the use of icons and other design elements. There should be encouragement for staff to experiment with these, so that improvements can be introduced to the entire intranet when they have proved their value in one section, or in a departmental intranet.

4. Managing standards and good practice.

The more decentralized intranet content contribution becomes the more important it is to set out workable and beneficial standards. All too often a CMS is installed to enable a wider range of staff to contribute content without the realization of the role of the intranet manager in setting implicit standards as they previously added content to the intranet on behalf of the organization. One excuse for not setting out standards is that they inhibit creativity. On an intranet creativity needs to be encouraged but also managed to prevent individual content contributors and departments turning their intranets into graphics-rich web sites from which no information can escape!

5. There are five aspects of standards management

Standards development, which is best achieved through bringing together staff with relevant experience. It is important to distinguish between 'fitness to specification' and 'fitness to purpose'. A pragmatic view needs to be taken of the level of detail of the standards so that the process does not result in a long list of standards which are not only inappropriate to the intranet but put an enormous burden on staff in adopting them.

These standards might include (for example only)

- The way that pdf files were divided into manageable sections
- No acronyms used unless either defined at a directory level or within the document
- Standard usability tests to be defined and used
- All public documents should have a summary of ca. 200 words.

- Readability tests for documents that may need to be read by visitors who do not have English as their mother tongue
- All material to be conformant with the Web Accessibility standards for users with visual and physical handicaps
- Specification of categories of document that would require Word and/or pdf and/or HTML versions to be made available
- Default format for lists would be alphabetical.

Standards publishing should be achieved by circulating a document which has links into sections of the intranet which demonstrate the standard in action, or even to expernal web sites. The aim is to show the benefits of using standards. A good example is to illustrate the problems caused by multi-page scrolling. Showing an example of bad practice from a web site is much more effective than any strongly-worded standard in print.

Standards conformance lies at the heart of the system. If there is no process by which staff who ignore standards cannot be 'encouraged' to conform then the entire process is a waste of effort. There needs to be an escalation process from a friendly email up to a request from the Chairman of the Steering Group to explain to a meeting of the Group why the standard is being ignored. There may well be a very good reason that could result in a change to the standard being made.

Standards reviews should be carried out on a systematic basis. All too often standards are superceded for a good reason but remain in the standards collection. There should be a process of review which ensures that all standards are reviewed on at least a two year basis. If a change is made attention needs to be given to the extent to which legacy content may need to be changed and the effort involved in doing so. Rather than change a standard (perhaps relating to the layout of tables) with immediate effect it may be better to change the review date of tabular material so that as the material is reviewed so the revised format is adopted. This spreads the effort out across the staff and departments concerned.

Good practice is a much better term than 'best practice'. In my view there is no such thing as 'best practice' as this usually ensures that an intranet stagnates. Good practice may relate to the way that departmental organization charts are laid out. Then one department proposes an alternative. They are allowed to try this out, and feedback gained from users, perhaps through the Development Group set out above. If the reaction is positive then other departments can be encouraged to adapt their organization chart. Setting these charts out as a standard is usually impossible given the wide variation in departmental structures.

6. Job descriptions and evaluations

Intranet roles and responsibilities should be incorporated into job descriptions, so that intranet contribution moves from being a hobby to a key element in the achievement of the organisation's business objectives. All too often I find that intranet managers are having to fit their responsibilities around what is already a full-time position. If the organisation is gaining benefit from the intranet then the staff involved need to have their

contribution recognised. Only in this way can issues of work overload and training requirements be discussed with managers in a formal environment.

For some organisations with highly structured job specifications deciding on the level and scope of 'intranet manager' can be a complicated process. A few years ago I was working for a major financial organisation, and made a number of recommendations about changes to their intranet strategy. All were quickly adopted with the exception of deciding on a job specification for intranet staff as this would require discussions with unions, and the possible regarding of staff working on the web site.

7. Usability

There is gradual, but now accelerating, awareness of the importance of usability in intranet design. On a public web site visitors will either put up with it, or find another site However on an intranet users will take the view that the intranet team should have known better. The usual excuse is that "Staff use it so often they soon work out how to use the intranet". The reality is that they don't – but they don't tell anyone!

Assume that through enhancing usability and content you can improve the information access productivity of each member of staff by 5 minutes a day. On an annual basis that is a saving of around 20 hours per person, or 0.6 of a working week. So for every 90 users you gain the working capacity of an extra member of staff as well as making speedier and better decisions. That is why usability is so important to the bottom line

Usability tests should be carried out with individual, and representative, members of staff. The tests should be based on specific business processes – for example, finding a vacation form, or checking on the progress of a project. The navigation path should be recorded (this can be done by recording the user speaking out aloud as they go through the process), the timing, and the comments made at the test. It is important to provide feedback at the end of the tests, indicating the changes that are being considered. In that way staff participating in the tests feel that their time is being well used.

8. Marketing the benefits

Underlying the entire process has to be an effective marketing strategy. The objectives of this marketing strategy should be to

- Promote the overall business value of the intranet
- Raise awareness of what content is on the intranet and how staff can use this to make more effective decisions
- Develop channels of ongoing communication with staff to ensure that concerns and suggestions are fully considered.

Setting out a full intranet marketing strategy is beyond the scope of this article, but its importance cannot be over-rated.